

PrintSmith™ Vision Release Notes

Version 4.3.0

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EFI Productivity Suite | *PrintSmith Vision Release Notes*

March 2019 PrintSmith Vision 4.3.0

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Table of Contents

| | |
|--|-----------|
| About This Document | 5 |
| Contact Information | 5 |
| Overview | 6 |
| PrintSmith Vision Server Requirements | 6 |
| Windows 64-Bit | 6 |
| Macintosh | 6 |
| Important Notes About the Server | 7 |
| Client Requirements | 7 |
| Browser Requirements | 7 |
| Monitor and Resolution Requirements | 8 |
| Network Requirements | 8 |
| Internet Requirements | 8 |
| Custom Document and Report Requirements | 8 |
| Receipt Printer Requirements | 8 |
| Fiery Integrations | 8 |
| Remote Print Center (RPC) – EFI-Hosted Installations | 8 |
| Digital StoreFront Integrations | 9 |
| Mobile View Requirements | 9 |
| Mobile Devices | 9 |
| Mobile Operating Systems | 9 |
| Browser Requirements for Mobile Views | 9 |
| New Features | 10 |
| Accounts | 10 |
| Contacts | 10 |
| Customer Enhancements/Defects Addressed in this Release | 11 |
| Billing address for contact linked to API | 11 |
| DSF/PSV Delivery Instructions | 11 |
| Apache Tomcat and PCI compliance | 11 |
| Additions to Pending Documents window | 11 |
| Charge notes displaying in Fast Track description | 11 |
| Contact Phone Field Length | 11 |
| Notes when copying an estimate or invoice | 11 |



| | |
|---|-----------|
| Wanted Date in Pending Documents..... | 11 |
| Frozen Customers..... | 11 |
| The fourth phone tag option missing..... | 11 |
| Canceling an Estimate | 11 |
| Overs/Unders Field | 12 |
| Name for Walk in account history | 12 |
| Email Window address field..... | 12 |
| Creating Customer/Prospect from Document..... | 12 |
| Copy a job to an existing estimate or invoice..... | 12 |
| Add items from different invoices to one delivery ticket..... | 12 |
| Editing Quick Stock Picker..... | 12 |
| Disabling HTML Available Features..... | 12 |
| Sales Tax Summary Report..... | 12 |
| PrintSmith Vision API..... | 12 |
| Known Issues | 13 |
| PSV-DSF Integration..... | 13 |
| Multi-part Job | 13 |
| Template List..... | 13 |
| Accounts and contact window..... | 13 |
| Invoice/Estimate reports..... | 13 |



About This Document

This document summarizes system requirements, new features, customer enhancements and defects that were addressed in this release.

Contact Information

EFI Support

| | |
|------------------|---|
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Regular US Service Desk hours are 7 A.M. to 5 P.M. Mountain Standard Time, Monday – Friday

Regular UK Service Desk hours are 8 A.M. to 5 P.M. Greenwich Mean Time, Monday – Friday

Regular EU Service Desk hours are 9 A.M to 6 P.M. Central European Time, Monday – Friday

Note For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

EFI Professional Services

| | |
|---------------------------|--|
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EFI Professional Services can help you perform EFI software installations and upgrades. This group can also help you implement, customize, and optimize your EFI software, plus offers a range of training options.

Overview

The computer where PrintSmith Vision and its database are installed is known as the *server*. PrintSmith Vision is then accessed by users through a browser on Windows® or Macintosh® computers. These computers are also known as *clients*.

This section describes the technical requirements you must meet for the PrintSmith Vision server (see below) and for the client computers (see page 6). In addition, to run PrintSmith Vision, you must meet some miscellaneous requirements such as browser version and monitor size and resolution.

Starting with PrintSmith Vision 3.0, mobile views of parts of the PrintSmith system are available from smartphones and tablets. Requirements for taking advantage of mobile views are on page 8.

Important Below are the system requirements for running PrintSmith Vision based on what was certified by EFI. If your environment is not listed below, then it has not been certified, and EFI cannot guarantee or support the results.

PrintSmith Vision Server Requirements

You can install PrintSmith Vision on a Windows or Macintosh computer as long as it meets the requirements listed below.

Important Although you can run PrintSmith Vision on a shared server, EFI strongly recommends a dedicated server. Not only does performance degrade when several applications run on the server, but issues resulting from conflicting applications can be very difficult to diagnose. This type of diagnosis is therefore not supported by EFI.

PrintSmith Vision can run on a virtual machine (VM). *While EFI supports PrintSmith Vision running in a virtual environment, EFI is not responsible for your virtual environment or its setup.* EFI will use commercially reasonable efforts to investigate potential issues with PrintSmith Vision running on a virtual machine, but as part of that investigation, EFI may require the issue to be reproduced independently of the virtual machine environment. When issues are confirmed to be unrelated to the virtual environment, EFI will support PrintSmith Vision in a way that is consistent with the support provided when PrintSmith Vision is running in a non-virtual environment.

Windows 64-Bit

| | |
|--------------------------|---|
| <i>Operating system:</i> | Windows 8 Windows 10 * Windows Server 2012 R2 Standard or Essentials |
| <i>Processor:</i> Intel | Quad Core i7 2.3 GHz |
| <i>Memory:</i> | 16 GB (more memory will improve performance) |
| <i>Hard drive:</i> | 50 GB free space |

Important * If you currently use PrintSmith Vision and want to upgrade to Windows 10, be sure to follow the instructions under “Windows 10 and existing PrintSmith Vision installations” in the *PrintSmith Vision - Release Notes*.

Macintosh

| | |
|--------------------------|---|
| <i>Operating system:</i> | OS X version 10.11, 10.11 Server, 10.12*, 10.12 Server*, 10.13.6 High Sierra |
| <i>Processor:</i> | Intel Quad Core i7 2.3 GHz |
| <i>Memory:</i> | 16 GB (more memory will improve performance) |
| <i>Hard drive:</i> | 50 GB free space |

Important * If you currently use PrintSmith Vision and want to upgrade to OS X 10.12, be sure to follow the instructions under “OS X 10.12 (Sierra) and existing PrintSmith Vision installations” in the *PrintSmith Vision - Release Notes*.

Important Notes About the Server

- If PrintSmith Vision is going to be run from other computers (clients), the server computer should have a static IP address. This IP address is part of the URL users enter to run PrintSmith Vision; if the IP address keeps changing (because it is not static), the URL will also keep changing.
- In addition, the server computer must be configured not to go to sleep. If the server goes to sleep, users who are running PrintSmith Vision from other computers will get a “server down” message and will be unable to use PrintSmith while the server is in sleep mode. On a Windows computer, turn off sleep mode in the **Power Options** settings in the Control Panel; on a Macintosh, turn off sleep mode in the **Energy Saver** settings.

Client Requirements

PrintSmith Vision Client Requirements (one on which PrintSmith Vision is not installed) are:

- Operating system: Windows 7, 8, or 10
- Macintosh OS X 10.13 (High Sierra)
- Memory: 4 GB minimum (more memory will improve performance)

Browser Requirements

| OS | Browser | Browser Version | Comments |
|---|----------------|--------------------------------|-----------|
| Windows 10 Professional Windows 2008 R2 Standard | Google chrome | Version 69.0.3497.100 (64-bit) | Certified |
| | Mozilla | 62.0.3 (64-bit) | Certified |
| | Microsoft Edge | 42.17134.1.0 | Certified |
| Mac OS 10.13 (High Sierra) | Safari | 12.0 (13606.2.11) | Certified |
| | Chrome | Version 65.0.3325.181 (64 bit) | Certified |
| iOS 11.0.3 (15a432) iPad | Safari | 11.0 (13604.1) | Certified |
| | Chrome | 62.0.3202.60 | Certified |

Monitor and Resolution Requirements

PrintSmith Vision is designed to be viewed and used on a large monitor with high resolution:

- 19-inch monitor
- Minimum resolution of 1280 x 1024

Note Important If you are using a laptop, to see estimates and invoices in full, the height (second number) must be at least 1024 pixels.

Network Requirements

- 100 base T Ethernet

Internet Requirements

In addition to being required to run PrintSmith Vision, Internet connectivity is required as follows:

- For initial licenses of software
- For upgrades and upgrade licenses
- For Payment Plan users during defined periods of plan
- For interaction with EFI Support team

Custom Document and Report Requirements

PrintSmith Vision reports and other documents (such as estimates or invoices) are written in i-net Clear Reports. If you want to customize your estimates or invoices (for example, include your logo) or if you plan to create custom reports, you must install i-net Designer, which is part of Clear Reports. You will be given the option to install i-net Designer during the PrintSmith Vision server installation.

Receipt Printer Requirements

A receipt printer is optional in PrintSmith Vision, but if you want to use one, you must purchase the Star TSP 700II printer *from EFI*.

For important information about configuring the receipt printer, see the *PrintSmith Vision - Configuring Receipt Printers*.

Fiery Integrations

If you are using PrintSmith Vision with a Fiery®, Fiery JDF version 1.5.0.36 is required.

When PrintSmith Vision is EFI-hosted, Remote Print Center (RPC) is also required.

Remote Print Center (RPC) – EFI-Hosted Installations

When PrintSmith Vision is EFI-hosted, Remote Print Center (RPC) is required for Fiery integrations and strongly recommended for receipt printing.

The computer on which you install RPC must meet these hardware and software requirements:

| | |
|--------------------------|---|
| <i>Operating system:</i> | Any 64-bit version of Windows or Macintosh OS X |
| <i>Processor:</i> | Dual core |
| <i>Memory:</i> | 4 GB |
| <i>Hard Drive:</i> 50 | – 100 GB |

In addition, the computer where you install RPC must:

- For Fiery integration, have access to the Fiery device(s) you are using.
- For receipt printing, be connected to the receipt printer.
- Have access to the Internet, including access to PrintSmith Vision.
- Run 24/7 and *not go to sleep*. It must be available for communication all the time.

Digital StoreFront Integrations

To use the eFlow-based integration of PrintSmith Vision with Digital StoreFront®, Digital StoreFront 9.6 or higher is required.

Mobile View Requirements

As of PrintSmith Vision 3.0, mobile views of parts of the PrintSmith system are available from smartphones and tablets. Mobile views are based on HTML5 technology. This section describes devices, operating systems, and browsers that are fully compatible with HTML5 and can therefore support PrintSmith Vision mobile views.

Mobile Devices

The following mobile devices are supported:

- iPad® 4th and 5th generation
- iPhone® 5 and 6
- Android™ tablets
- Android smartphones

Mobile Operating Systems

- iOS 8.3
- Android 4.1, 5.1

Browser Requirements for Mobile Views

The following browsers are supported:

- Chrome 21 or higher
- Safari 5 or higher

Note Mozilla Firefox is *not* supported.

New Features

Accounts

Accounts are a key part of your PrintSmith Vision system. Invoices are assigned and posted to accounts, payments are made for accounts, account histories are tracked, and sales statistics are kept for each account.

In PrintSmith Vision, you can define accounts for both prospects and customers. Prospects have not yet done business with you, but you hope to turn them into customers. Customers have done business with you, and invoices have been created for them. Once you create an invoice for a prospect, that prospect is automatically converted to a customer. If customers become inactive, they can be turned into prospects again.

Contacts

Contacts are the people associated with an account, for example, those who receive statements or invoices or to whom you send promotional mailings. An account may have a single contact or may have many; it depends on the account.



Customer Enhancements/Defects Addressed in this Release

Billing address for contact linked to API.

When the Contact ID is passed to the API and when the invoice is being built the alternative billing address will now be used. The contact content will be the default when the contact ID is invoked with the API and the details of the contact will be the result of this invoice creation. (Issue Reference 23365).

DSF/PSV Delivery Instructions

Delivery instruction added in DSF will now be transferred to PSV. (Issue Reference 23339)

Apache Tomcat and PCI compliance

Tomcat upgrade for 9.2 version is included with the 4.3 release. (Issue Reference 23324)

Additions to Pending Documents window

New columns for deposit amount, document total and ordered date have been added to the Pending Documents window. Time has been added in the proof date column. (Issue Reference 23157).

Charge notes displaying in Fast Track description

Charge notes will now show in Fast Track description if "Show notes" check box is selected. In case of inline edit, only charge description will be changed and charge notes will get appended after edit is complete. (Issue Reference 22902)

Contact Phone Field Length

The length of the phone field has been changed to 255 characters. (Issue Reference 22766)

Notes when copying an estimate or invoice

When copying an Invoice/ Estimate an account notes warning will now be displayed. (Issue Reference 22636)

Wanted Date in Pending Documents

In Pending Documents the wanted date will now also display time. (Issue Reference 21741)

Frozen Customers

Frozen customers will now show on the list when creating estimates/invoices. There will be a message that the account is frozen. (Issue Reference 21685) This would also apply to the Walk-In account. (Issue Reference 21392)

The fourth phone tag option missing

Now the 4th "others" field is added in the Invoice/Estimate account information window. The Data added in fourth field is displayed in Fax field when in editable mode. Displays correct data when in collapse mode. (Issue Reference 21638)

Canceling an Estimate

You can now void an estimate from Pending Documents. (Issue Reference 21353)

Overs/Unders Field

The overs/unders field has been added to the job windows in estimating and invoicing (Issue Reference 21330)

Name for Walk in account history

For Walk in Account, while creating a new job from account history on Invoice or Estimate a new column "Account Name" has been added so that the user can filter the posted invoice based on name. Default sorting is now based on the posted date. The user will now be able to see at least 5-6 rows on minimum supported resolution. Tooltip has been added on description column. (Issue Reference 21243)

Email Window address field

User is now able to select email id of contacts that are present in account. (Issue Reference 21237)

Creating Customer/Prospect from Document

The user is now able to create an account from the document for walk in Invoice, Estimate and DSF order. (Issue Reference 21219)

Copy a job to an existing estimate or invoice

Now user will be able to copy any job from an invoice to another invoice. New arrow button is provided against each invoice to expand and select the required job. (Issue Reference 21204)

Add items from different invoices to one delivery ticket

Now user can add more invoices belonging to the same account when creating delivery ticket. Added '+' button on delivery ticket page to allow user to add invoices from the same account to delivery ticket. (Issue Reference 21128)

Editing Quick Stock Picker

A stock and size feature has been added which allows you to select the stock identifies to be displayed in stock picker. Go to Configuration > Settings > Preferences. (Issue Reference 21105).

Disabling HTML Available Features

You now have the option to disable HTML Available features on Flex UI. It is found under Preference > HTML View. When upgrading, by default, all options would be enabled for this newly added option. Per user preference you can then enable or disable the options. This setting will apply to flex side only. (Issue Reference 23615)

Sales Tax Summary Report

The sales tax summary report has been fixed. Now user will be warned when trying to save an invoice if the tax element is missing in the selected tax table. Once the tax element is added, historical Invoice/estimate will ask to update the tax table. (Issue Reference 23563)

PrintSmith Vision API

When an invoice is created from the API and the SKU is invoked, the job will now build from the Products template and pick up the SKU from API. (Issue Reference 23703)

Known Issues

PSV-DSF Integration

- If a Web order job contains a rush fee, then adding a new job to invoice is sending negative adjustment to DSF.
- Rush Fee is coming as adjustment entry on DSF once you pick the invoice in PSV

Multi-part Job

- Job level charges are not getting added to multi-part job when an existing job method is changed to multi-part

Template List

- On Account list settings tab, when selecting add template the list is not correct

Accounts and contact window

- Search is not functional properly if user types the data quickly on big database.
- Use permission at tab level is not working, it is only applied at account level.

Invoice/Estimate reports

- Historical jobs which have multi-qty added from command line would still be printed in Invoice/Estimate report when printed from HTML although this option is not available in HTML. Make sure to remove from flex UI if not required.
-