efi *Productivity Suite*

PrintSmith™ Vision Release Notes

Version 4.4.0

Patents

This product may be covered by one or more of the following U.S. Patents: 4,716,978, 4,828,056, 4,917,488, 4,941,038, 5,109,241, 5,170,182, 5,212,546, 5,260,878, 5,276,490, 5,278,599, 5,335,040, 5,343,311, 5,398,107, 5,424,754, 5,442,429, 5,459,560, 5,467,446, 5,506,946, 5,517,334, 5,537,516, 5,543,940, 5,553,200, 5,563,689, 5,565,960, 5,583,623, 5,596,416, 5,615,314, 5,619,624, 5,625,712, 5,640,228, 5,666,436, 5,745,657, 5,760,913, 5,799,232, 5,818,645, 5,835,788, 5,859,711, 5,867,179, 5,940,186, 5,959,867, 5,970,174, 5,982,937, 5,995,724, 6,002,795, 6,025,922, 6,035,103, 6,041,200, 6,065,041, 6,112,665, 6,116,707, 6,122,407, 6,134,018, 6,141,120, 6,166,821, 6,173,286, 6,185,335, 6,201,614, 6,215,562, 6,219,155, 6,219,659, 6,222,641, 6,224,048, 6,225,974, 6,226,419, 6,238,105, 6,239,895, 6,256,108, 6,269,190, 6,271,937, 6,278,901, 6,279,009, 6,289,122, 6,292,270, 6,299,063, 6,310,697, 6,321,133, 6,327,047, 6,327,050, 6,327,052, 6,330,071, 6,330,363, 6,331,899, 6,340,975, 6,341,017, 6,341,018, 6,341,307, 6,347,256, 6,348,978, 6,356,359, 6,366,918, 6,369,895, 6,381,036, 6,400,443, 6,429,949, 6,449,393, 6,476,927, 6,490,696, 6,501,565, 6,519,053, 6,539,323, 6,543,871, 6,546,364, 6,549,294, 6,549,300, 6,550,991, 6,552,815, 6,559,958, 6,572,293, 6,590,676, 6,606,165, 6,633,396, 6,636,326, 6,643,317, 6,647,149, 6,657,741, 6,662,199, 6,678,068, 6,707,563, 6,741,262, 6,748,471, 6,753,845, 6,757,436, 6,757,440, 6,778,700, 6,781,596, 6,816,276, 6,825,943, 6,832,865, 6,836,342, RE33,973, RE36,947, D341,131, D406,117, D416,550, D417,864, D419,185, D426,206, D439,851, D444,793.

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Table of Contents

About This Document

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

Contact Information

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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.

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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

Operating system:		*Wi*ndows 8 Windows 10 * Windows Server 2012 R2 Standard or Essentials
Processor:	Intel	Quad Core i7 2.3 GHz
Memory:		16 GB (more memory will improve performance)
Hard drive:		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

Operating system:	OS X version 10.11, 10.11 Server, 10.12*, 10.12 Server*, 10.13.6 High Sierra
Processor:	Intel Quad Core i7 2.3 GHz
Memory:	16 GB (more memory will improve performance)
Hard drive:	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 **Windows2008 R2 Standard**	Google chrome	Version 74.0.3729.169 (64-bit)	Certified
	Mozilla	67.0.4 (64-bit)	Certified
	Microsoft Edge	44.17763.1.0	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 700ll 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:

Operating system:	Any 64-bit version of Windows or Macintosh OS X
Processor:	Dual core
Memory:	4 GB
Hard Drive: 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 History

The Account History report provides a historical record of all accounting activity for a customer or prospect and is a powerful tool for managing your business. For example, you can use the history to answer specific questions about payments, determine when a particular order was placed, examine the unpaid (open) invoices on the account, print a detailed account activity report, and open an old invoice so you can copy it (and re-use it).

Estimate History

The Estimate History report provides a record of the estimate activity for each customer or prospect. Use this report to answer questions about past estimates, to determine when a particular estimate was entered, to see whether an order was won or lost, or to open an old estimate and re-use its information in a new estimate or invoice.

Line Item Taxation

With line item taxation you can tax individual line items in an invoice independently. For example, in some tax jurisdictions an item that involves just labor (such as folding) may be taxed differently from an item that involves both labor and materials (such as printing). In addition, jobs in an invoice may be delivered to different locations that are subject to different taxes. When using line-item taxation you can have up to five different tax tables per invoice

Reason Table Editor

You can define reasons for a lost estimate and identify the appropriate reason for an estimate from Estimate History or from Pending Documents.

Monthly Closeout

 A monthly closeout will summarize the daily closeouts.

Import Stock

The Stock Import feature allows you to import stock definitions and update prices from an electronic price catalog from a vendor. You can also use this feature to manually map stock to stock already registered in Digital Store Front.

Customer Enhancements/Defects Addressed in this Release

Expand/Collapse Invoice Summary

Under User Preferences there is a listing for Summary configuration. Here you have the option to expand the Estimate/Invoice Summary or not. The estimate summary and invoice summary screens have a portion of the screen that is collapsed. If you check this box then it will open the summary screens expanded and if unchecked the summary screens will open with it collapsed. (Issue Reference 24454)

DSF Sync Status

The DSF sync status will now show in account/contact view page (Issue Reference 24425)

Menu Scroll for Side Bar

A scroll has been added when the icons cannot fit in low resolution screens. (Issue Reference 24422)

Increase in size of some elements

The Fiery Button, quantity and total price images have been increased in size on the job details page. (Issue Reference 24421)

Individual User Sales Summary

An individual user sales summary has been added to the dashboard/Quick Access page. (Issue Reference 24385)

Delivery on Date

In the pending documents window the delivery on date will now show. This column can also be sorted and filtered. Using the User Preference window you can also determine if this column will be displayed or not. (Issue Reference 24357)

Account and Estimate History Search Fields

Contact Name has been added to the search fields. (Issue Reference 20334)

Contact name for each order will show in account history window. (Issue Reference 18516)

PO Number on Locked Invoices

You can now add a PO number from the account history window on an invoice for locked or picked up documents. (Issue Reference 18358)

User/rep Field in Account History

The user/rep field in account history has been split into two fields, user and sales rep. (Issue Reference 12706)

Posting JE Total Fields

While posting JE total fields will disable for Invoice level. They will be enabled if JE is created at an Account level. If you want to change the total for the invoice you can adjust by Calculate (%) or New Balance field. (Issue Reference 24382).