

PrintSmith™ Vision Release Notes

Version 4.6.0

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EFI Productivity Suite | *PrintSmith Vision Release Notes*

March 2020 PrintSmith Vision 4.6.0

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About This Document

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

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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

<i>Operating system:</i>	Windows OS Windows Server 2016 Windows Server 2012 R2 Standard or Essentials Windows 8 Windows 10
<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

Macintosh

<i>Operating system:</i>	10.13.6 High Sierra, macOS Mojave (10.14)
<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

Windows 10 and existing PrintSmith Vision installations

Windows 10 is supported for both the PrintSmith Vision server computer and client computers. If you want to upgrade your server to Windows 10, be sure to follow the instructions below for existing PrintSmith Vision installations.

Important During an upgrade to Windows 10, PrintSmith Vision is currently removed so you will lose your PrintSmith system unless you follow the steps below.

1. Back up your entire PrintSmith Vision system using the Backup Manager preferences as described in the "Backup Manager preferences" section of the *PrintSmith Vision - Setup and User Guide*.

Important Store the backup on an external device or in the cloud to make sure your backed-up data stays safe during the upgrade.

2. Deactivate your PrintSmith Vision license:
 - a. Before you uninstall PrintSmith Vision, log into the system.
 - b. Select **Help > About PrintSmith**.
 - c. Click **Update License**.

About PrintSmith...

PrintSmith™

License Type : PrintSmith Vision Base System (2 Users)

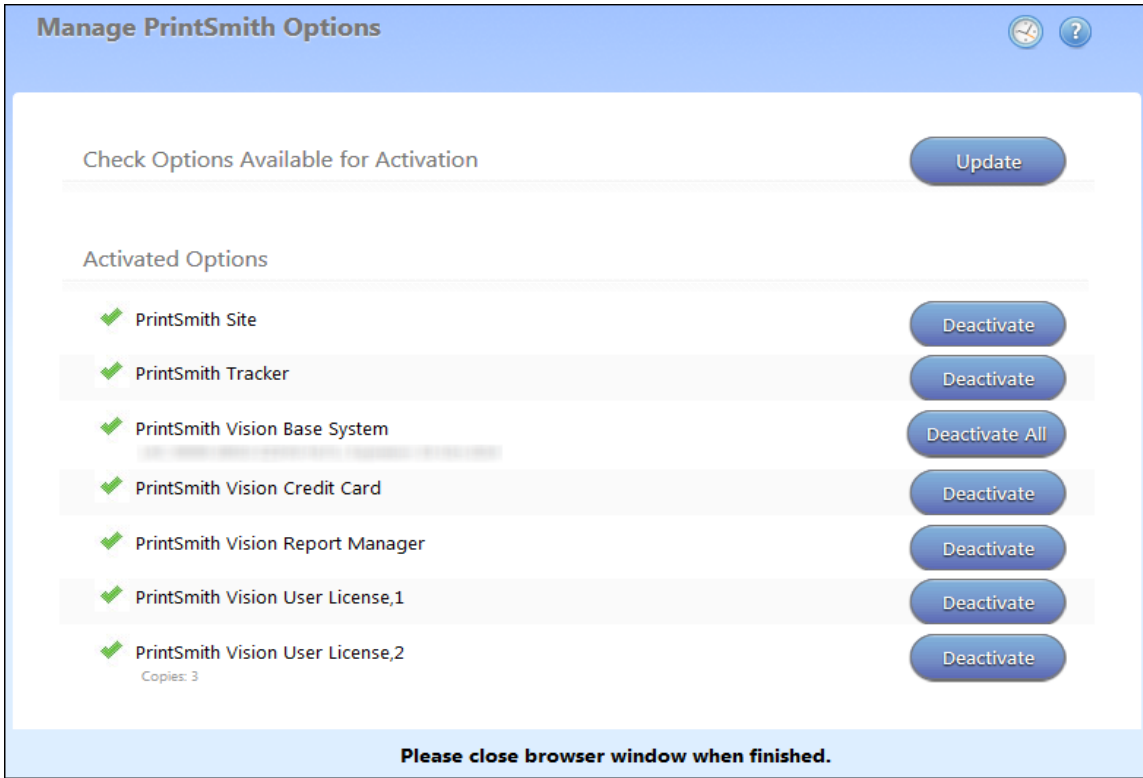
Version 3.0 3.4.1048

Update License

Feature	License	Validity
PrintSmith Vision Credit Card Processing	Available	Permanent
PrintSmith Vision Base System	Available	Permanent
PrintSmith Site	Available	Permanent
PrintSmith Vision Report Manager	Available	Permanent
PrintSmith Scheduler	Available	Permanent
PrintSmith Tracker	Available	Permanent
PrintSmith Users	Available	Permanent

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- d. In the Manage PrintSmith Options window, click **Deactivate All**.



e. After the deactivation is confirmed, click **Finish**.

3. Uninstall PrintSmith Vision.

4. Upgrade your operating system to Windows 10.

5. After the operating system is upgraded, install PrintSmith Vision and activate your license. (For installation instructions, see the *PrintSmith Vision - Installation and Upgrade Guide*.)

6. Restore your database, custom documents/reports, and digital assets (content files) as described in the “Restoring the entire PrintSmith Vision system” section of the *PrintSmith Vision - Setup and User Guide*.

Windows 10 and new installations of PrintSmith Vision

If you are new to PrintSmith Vision, just install it on your Windows 10 computer as described in the *PrintSmith Vision - Installation and Upgrade Guide*.

For Existing PSV server who are upgrading to Windows Server 2016

1. Back up your entire PrintSmith Vision system using the Backup Manager preferences as described in the “Backup Manager preferences” section of the *PrintSmith Vision - Setup and User Guide*.

Important Store the backup on an external device or in the cloud to make sure your backed-up data stays safe during the upgrade.

2. Deactivate your PrintSmith Vision license:
 - a) Before you uninstall PrintSmith Vision, log into the system.
 - b) Select Help > About PrintSmith.
 - c) Click Update License.
 - d) In the Manage PrintSmith Options window, click Deactivate All.
 - e) After the deactivation is confirmed, click Finish.

3. Uninstall PrintSmith Vision.
4. Upgrade your operating system Windows Server 2016
5. Install PrintSmith Vision and activate your license. (For installation instructions, see the PrintSmith Vision - Installation and Upgrade Guide.)
6. Restore your database, custom documents/reports, and digital assets (content files) as described in the “Restoring the entire PrintSmith Vision system” section of the PrintSmith Vision - Setup and User Guide.

OS X and new PrintSmith Vision installations

Macs running OS X 10.11 and higher do not have Java installed, which is required to install PrintSmith Vision. Download and install Java *before* starting the PrintSmith Vision Installer.

OS X 10.13 (High Sierra) and existing PrintSmith Vision installations

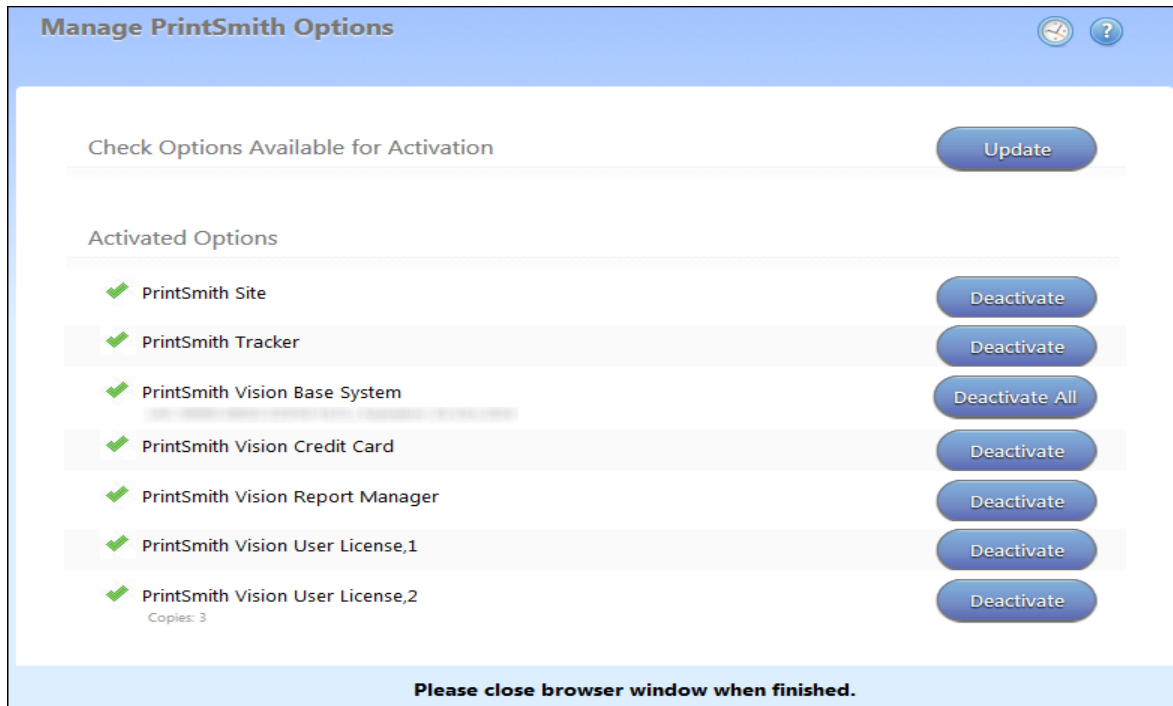
OS X 10.13 is supported for both the PrintSmith Vision server computer and client computers. If you want to upgrade your *server* to OS X 10.13, be sure to follow the instructions below for existing PrintSmith Vision installations.

Important *During an upgrade to OS X 10.13, Apple currently removes a critical part of the PrintSmith Vision system. Follow the steps below to avoid having a non-functioning PrintSmith system.*

1. Back up your entire PrintSmith Vision system using the Backup Manager preferences as described in the “Backup Manager preferences” section of the *PrintSmith Vision - Setup and User Guide*.

Important Store the backup on an external device or in the cloud to make sure your backed-up data stays safe during the upgrade.

2. *Deactivate your PrintSmith Vision license:*
 - a. *Before* you uninstall PrintSmith Vision, log into the system.
 - b. Select **Help > About PrintSmith**.
 - c. Click **Update License**.
 - d. In the Manage PrintSmith Options window, click **Deactivate All**.



- e. After the deactivation is confirmed, click **Finish**.
3. Uninstall PrintSmith Vision.
4. Upgrade your operating system to 10.13
5. After the operating system is upgraded, install Java. (Java is required for PrintSmith Vision installation.)
6. Install PrintSmith Vision and activate your license. (For installation instructions, see the *PrintSmith Vision - Installation and Upgrade Guide*.)
7. Restore your database, custom documents/reports, and digital assets (content files) as described in the “Restoring the entire PrintSmith Vision system” section of the *PrintSmith Vision - Setup and User Guide*.

OS 10.14 (Mojave) and existing PrintSmith Vision installations

OS 10.14 is supported for both the PrintSmith Vision server computer and client computers. If you want to upgrade your server to OS 10.14, be sure to follow the instructions below for existing PrintSmith Vision installations.

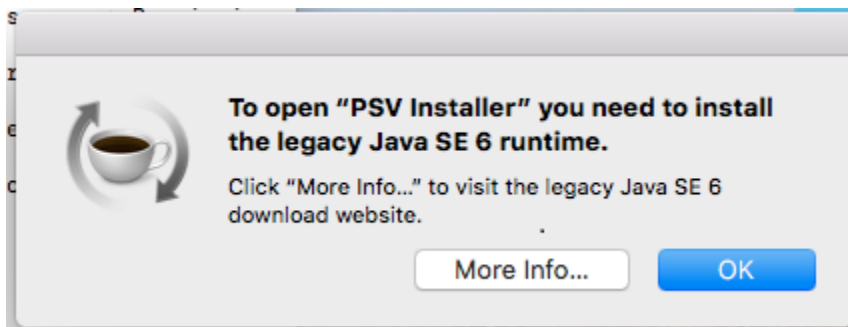
Important During an upgrade to OS 10.14, Apple currently removes a critical part of the PrintSmith Vision system. Follow the steps below to avoid having a non-functioning PrintSmith system.

1. Back up your entire PrintSmith Vision system using the Backup Manager preferences as described in the “Backup Manager preferences” section of the *PrintSmith Vision - Setup and User Guide*.
Important: Store the backup on an external device or in the cloud to make sure your backed-up data stays safe during the upgrade.
2. Deactivate your PrintSmith Vision license:
 - a. Before you uninstall PrintSmith Vision, log into the system.
 - b. Select Help > About PrintSmith.
 - c. Click Update License.
 - d. In the Manage PrintSmith Options window, click Deactivate All.
 - e. After the deactivation is confirmed, click Finish.
3. Uninstall PrintSmith Vision.
4. Upgrade your operating system to 10.14

5. After the operating system is upgraded, install Java. (Java is required for PrintSmith Vision installation.)
6. Install PrintSmith Vision and activate your license. (For installation instructions, see the PrintSmith Vision - Installation and Upgrade Guide.)
7. Restore your database, custom documents/reports, and digital assets (content files) as described in the "Restoring the entire PrintSmith Vision system" section of the PrintSmith Vision - Setup and User Guide.

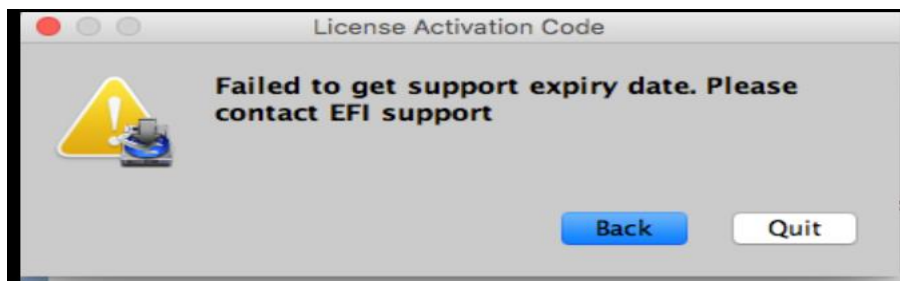
Fixing PSV Installation and license maintenance support check on MAC OS Mojave

While running the PSV installer on Mojave, following error message will be displayed. Steps mentioned below needs to be performed **only** during this error



Steps to resolve installation issue

1. Download and Install the JRE 1.6 from the following dropbox location (Unzip the downloaded zip file and install the JRE through dmg file)
https://efi365-my.sharepoint.com/:u:/g/personal/parvez_shaikh_efi_com/Efpt3Yjlok5Bk-ryKm0qiDEBez9-WokelwQf159ofe5mlA?e=l8z7HS
2. Once the installation is complete, download the Java security files from the following dropbox link
https://efi365-my.sharepoint.com/:u:/g/personal/parvez_shaikh_efi_com/EUQpn6Fz_hZHt54d58v1ZdoBxV5o33sBVp-TYtTo8hDt-w?e=A2A3Yp
3. Open Finder, Navigate to menu Go->Go To Folder and paste the following path and click OK
/Library/Java/JavaVirtualMachines/1.6.0.jdk/Contents/Home/lib/security
4. Once in this folder, copy and overwrite the files from the zip file downloaded in Step 2. Ensure that following files are overwritten
 - a. blacklist
 - b. cacerts
 - c. trusted.libraries
5. Now perform the installation of PSV



Note: If the users have already installed legacy Java SE 6 runtime through apple website and during installation if customer see above message during license maintenance check, then please follow the instructions from Step 2.

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 8, or 10 and above
- Macintosh OS X 10.13 (High Sierra) and above

Browser Requirements

OS	Browser	Browser Version	Comments
Windows 10 Professional Windows 2008 R2 Standard Windows 2016	Google chrome	Version 80.0.3987.149 (64-bit)	Certified
	Mozilla	74.0 (64-bit)	Certified
	Microsoft Edge	44.18362.449.0	Certified
Mac OS 10.14	Safari	12.0 (14606.1.36.1.9)	Certified
	Chrome	Version 80.0.3987.149 (64-bit)	Certified
iOS 13.3.1 iPad	Safari	13.0	Certified
	Chrome	80.0.3987.95	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.

Market Direct StoreFront Integrations

To use the eFlow-based integration of PrintSmith Vision with Market Direct StoreFront®, Market Direct 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 80.0 or higher
- Safari 10 or higher

Note Mozilla Firefox is *not* supported.

New Features

Account Utility

To display account & order balance data in a more efficient manner, we now have an Account utility page, which includes the balance information, previously scattered in different places like, Verify Customer Balance, Verify All Balances. This is now stream-lined and displayed in one place. Also, now you have ability to sort and filter the columns to fully capitalize the information that is displayed. Now if there is a difference in balance, the Fix button will be visible on this page and on click of it, the balance will be fixed.

Additionally, the account utility also incorporates Generate Statements, Account Aging, and Aging and Statement reports (Please refer to the user guide for more details about this feature).

Generate Statements

You can now Generate Statements by going into the Account Utility and clicking on Generate Statements button. Here you can review the status of accounts by aging them and applying finance charges as necessary. Typically, you could generate statements at regular intervals (such as monthly) so that you can let customers know of their outstanding balances. There is an option to either print or e-mail statements. (Please refer to the user guide for more details about this feature).

Account Aging

You can now Age Accounts by going into the Account Utility and clicking on Account Aging. Additionally, there is now an option to age a single account or group of accounts from the list. The purpose of Account Aging is to determine the status of customer accounts and warn you of accounts that may need collection action. An accurate gauge of your receivables is essential to running a healthy business. (Please refer user guide for more details about this feature)

Aging and Statement reports

While generating a statement report or during account aging, if you select a Save report check box option on the Report Tab, a copy of the report is saved so that you can reprint it later if necessary.

A save statement report will be named as "Statements" followed by the date you generated the statements. For example; Statements – 03-19-2020.

A save account aging report will be named as "Account Aging" followed by the date you generated the statements. For example; Account Aging – 03-19-2020

Report Manager

Report Manager is a separately licensed tool that is fully integrated with PrintSmith Vision and available from the **Reports** menu. You can use Report Manager to do the following:

- Replace one of the standard PrintSmith Vision reports with one of your own reports.
- Add and run custom reports.
- Sort and filter the list to choose your desired report.
- Schedule Reports, now supports both FTP and SFTP (Please refer user guide for more details about this feature).

Account Ranking

You could now access the new and improved Account Ranking page from Report Manager. The Account Ranking report lists accounts in order by different criteria. For example; you can sort it by balance, number of orders, or sales. You can save these rankings so that they are available elsewhere in PrintSmith. For example; on the **Sales Info** tab in the Customer window. Additionally, you are now able to sort and filter the page to see relevant data. (Please refer user guide for more details about this feature).

Cash Drawer Status

You can now access the Cash Draw Status window from Accounting >> POS (Point of Sales)>> Cash Drawer Status. Now we have an improved Cash Drawer Status page, where you can see Accounts Receivable Balance and Total Customer Accounts Balance. If there is Difference you can Fix it. The Cash Drawer Status window is set up to aid in balancing your accounts and sales. (Please refer user guide for more details about this feature).

Sales Tax Table

You can now access the Sales Tax page from Pricing > Sales Tax. You can setup tax tables which are used for properly calculating and reporting your sales taxes, Also, now you are able to filter and sort tables for ease of use.

Ordering Stock

There is a new improved stock order window. You will now be able to perform the following actions:

- In the To Order Tab, there are two distinct views to see pending list stock and low inventory stocks.
- The "To Order" list page quickly allows you to sort and filter stock that needs to be ordered.
- In the Stock Order list page, columns can be rearranged per user preference.
- On the Stock Order page, you can now select multiple stocks for ordering (it can be manual order or purchase order).
- On the Stock Order page, the user can now complete order by receiving the order fully or partially.
- In the Stock Order page, we have added legends to distinguish between the purchase order, manual order, partial order, or fully received order.
- In the Order Stock page, there is an option for manually adding order from option Select stock.
- From the Stock Order page, you can print report (Please refer user guide for more details about this feature).

ShipExpress

Now PrintSmith Vision has an Integration with ShipExpress (Process Shipper). This module is accessible to PrintSmith customers when the option for ShipExpress is added to your license. It allows you to send your delivery information to shipping vendors like FedEx and UPS. Get live rates based on shipping location and weight of packages. When vendor is pricing is finalized, the shipping price is updated to the PrintSmith invoice. (Please refer user guide for more details)

Customer Enhancements/Defects Addressed in this Release

Journal Entry

Error message when adding a journal entry about a tax element. It has been addressed by modifying the message displayed when the tax elements are missing in the tax table.

The Affect Sales toggle was showing as OFF when the toggle was ON when a Journal entry was added. Now when you open an existing journal entry, the Affects sales will display the correct status.

Account History

User was not able to sort by the document number in the Account History window. The sort query was happening on the document display number. If the document number had a prefix and suffix, it was giving an error. This has been resolved.

When multiple walk in invoices were picked up and a payment was made, in Account History, the account name of all the invoices that were picked up were getting changed to the first invoice's company name. This was due to the ID association getting changed. This has been resolved.

Account/Contact

User was not able to add the city name with an apostrophe. This has been resolved

User was not able to search account names if they contained an apostrophe. This has been resolved.

Invoice

When a new Invoice/Estimate is created from Account History, a new column has been added to display the PO number. User will now be able to search Invoice/Estimate using the PO number.

Job Details

When a job is changed from Outside Services to Charges Only, and a vendor was selected, the vendor would not be printed on the Job ticket since Vendor is not applicable for Charges only jobs. This issue has been resolved.

User was not able to view the full description of the job in certain browsers. This has been resolved.

Unable to search stock by all words in Stock Picker. The issue was due to the search looking for an exact word. This has been addressed by adding like search in the name column.

User was able to add a deposit to a locked invoice. Now the confirm button on the deposit window will be disabled on a locked invoice.

Stock Price expired warning is now displayed in Fast Track while creating a job if the selected stock price is expired.

Error message was displayed for some users who didn't have permission to use a Paper Template when they were accessing the Paper Calculator in the job window. This has been resolved.

User was not able to print carton labels on a custom page setup size. The labels were always printed on a A4 sheet size. This has been resolved.

Pending Document

System was reverting to 25 records when a user filters the data and then later clear the filters from Pending Documents. This has been addressed now and system remembers the last set value.

Shipping method (Ship Via) column is available on the pending list. This option needs to be enabled from customize list.

Post Payment

User was unable to see the data when the Post Payment window had many records, they start selecting the first few items, and then select the last few items. The page was showing blank. This has been resolved.

Market Direct StoreFront (Formerly known as Digital StoreFront) PrintSmith Vision issues.

When an MDSF Static type order had multiple PDF's attached to it, the page count was referring to only the first PDF. This has been addressed so the page count will be recorded based on all the PDF files available in the order.

User in PSV was not able to view the final width and height entered in MDSF. Now the web worksheet would display the final width and height coming from MDSF.

A product ordered in MDSF mapped with a PSV template that has an adjustment charge in it, would have a difference between the PSV invoice total and the MDSF order total. Now when an MDSF order is received, the correct calculation will happen.

Closeout

When generating a monthly Accounting links report, the date in the header would not print correctly when the user selected a date range. This has been addressed

If two payment transactions are done simultaneously by two different users, one of the transaction details was not getting recorded. This was causing an issue with the AR balance in the Sales Summary report. This has been addressed in Fast Track (Only). When a closeout is initiated, the AR balance will be fixed automatically and displayed on the Sales Summary report. Additionally, the user can manually fix this before initiating a closeout from the cash drawer window by clicking the "Fix" button, which will be available when there is a difference between the AR balance and the Account History balance.

Note This fix is available only when the closeout is initiated from Fast Track. Doing an Auto Closeout will not fix this issue.

QuickBooks

New changes to support QuickBooks 19 & above are addressed, Now the user will need to enable the "QuickBooks 2019 and above check box which is available under the Legacy Admin>Preferences>Accounting>GL profile. The new Account links IIF file can then be exported and Imported into QuickBooks 19.
