

efi PrintSmith Vision™



Release Notes

PrintSmith Vision
Version 3.0
June / 2015

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EFI PrintSmith Vision | *Release Notes*

July 2015 PrintSmith Vision 3.0

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About this Document

This document describes the enhancements and corrections that were made in PrintSmith™ Vision 3.0.

Contact Information

You can contact PrintSmith Vision Customer Support in any of the following ways.

Phone

North America

888.731.2618
480.538.5800
Monday - Friday 7 A.M. - 5 P.M. US Mountain Standard Time

UK

0800 783 2737
Monday - Friday 8 A.M. - 5 P.M. UK Time

EMEA

+49 2102 745 4500
Monday - Friday 9 A.M. - 6 P.M. Central European Time

Fax

480.538.5804 (North America)

E-Mail

printsmith.support@efi.com

Important Information – Read This!

Do You Meet System Requirements?

Be sure you meet the system requirements listed on page 8.

Important Mac OS X 10.8 is no longer a supported operating system for PrintSmith Vision servers.

Macintosh OS X Installation Folder

When you install PrintSmith Vision on a Mac, be sure to install it in the default **Applications** folder. Custom folders are not currently supported, and will prevent PrintSmith Vision from running.

If You Are Upgrading from PrintSmith Classic 8.1 to PrintSmith Vision

If you are upgrading from PrintSmith 8.1, make sure you have PrintSmith Classic 8.1.27 installed before you export your data. For complete details of upgrading, see the *PrintSmith Vision Installation and Upgrade Guide*.

If You Are Updating PrintSmith Vision

If you already have PrintSmith Vision installed, and are updating it, see the instructions starting on page 35 of the *PrintSmith Vision Installation and Upgrade Guide*.

Warning To update to PrintSmith Vision 3.0, you must be at version **2.4**. You cannot update directly from an earlier version of PrintSmith Vision.

Before you start the update

- Back up the PrintSmith Vision database (and Scheduler database if you use Scheduler); the InvoiceRepository and ReportRepository folders that contain custom documents and reports; and the DigitalAssetsRepository folder that contains all the content files that were uploaded for jobs. For details of backing up, see the *PrintSmith Vision Setup and User Guide*.
- Close PrintSmith Vision Monitor, pgAdmin, and any PrintSmith Vision installation folders that are open.

After the update

To ensure you are seeing all the latest changes to the user interface, clear your browser cache. You only need to do this for any browser that you used to run PrintSmith Vision in the past. For instructions on clearing the browser cache:

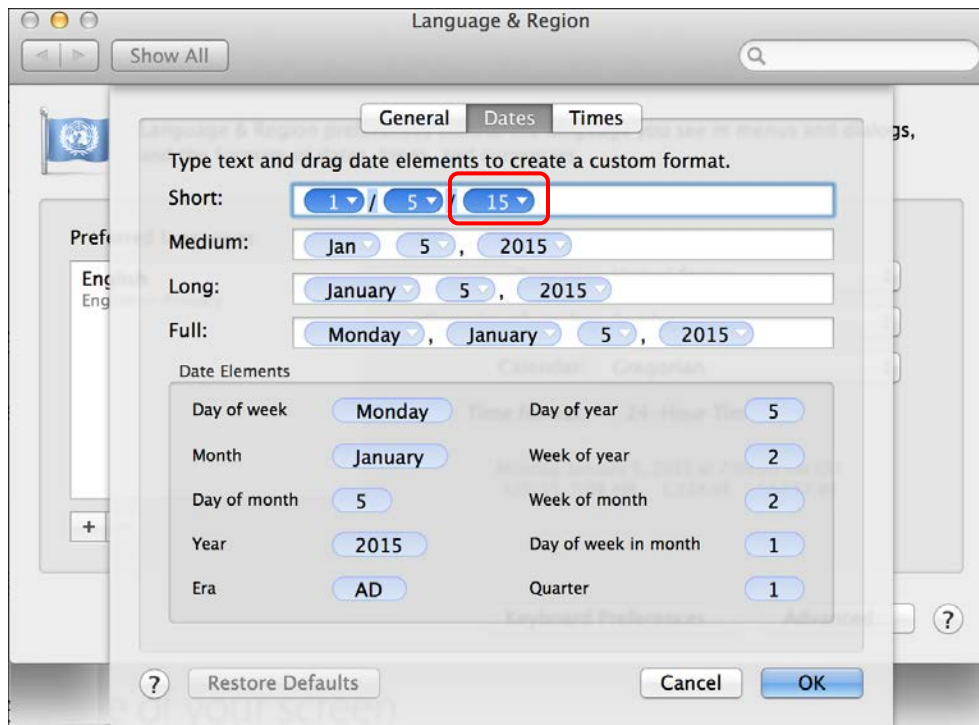
Chrome	https://support.google.com/chrome/answer/95582?hl=en
Firefox	https://support.mozilla.org/en-US/kb/how-clear-firefox-cache
Internet Explorer	http://windows.microsoft.com/en-in/windows7/how-to-delete-your-browsing-history-in-internet-explorer-9
Safari	https://answers.syr.edu/display/software/Clear+Cache+in+Safari+version+7+on+Mac+OSX

Important Make sure all your users clear their browser cache, too.

Known Issues

Dates when using Mac OS X 10.10 (Yosemite)

When you access PrintSmith Vision from a Mac running 10.10, dates selected in the Account Info window, Generate Statements window, and so on, may change to a different date. As a workaround, select the YY (e.g., 15) format for the **Short** date in System Preferences (**Date & Time > Open Language & Region > Advanced > Dates**).



Firefox v. 37 and 38 on Macs

Do not use Firefox v. 37 or 38 on a Mac; a known issue prevents users from entering their PrintSmith Vision user name and password with this version of Firefox. Firefox v. 36 works fine.

System Requirements

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 9).

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 11.

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 7 Windows 8 Windows Server 2008 R2 Standard 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

** If you use Internet Explorer 11 on Windows Server 2012, some additional configuration may be required. See the section on “Windows Server 2012 and Internet Explorer 11” in the *PrintSmith Vision Installation and Upgrade Guide*.

Macintosh

<i>Operating system:</i>	OS X 10.9, 10.9 Server, 10.10, or 10.10 Server **
<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

** If you currently have a pre-3.0 version of PrintSmith Vision installed on a Mac, and want to upgrade your Mac to OS X 10.10, you must update PrintSmith Vision to 3.0 *before* you upgrade the operating system. After you upgrade the operating system, you must download and re-install Java. (When Apple upgrades the operating system, it removes Java, which is required to uninstall PrintSmith Vision and to install future versions of PrintSmith Vision.)

Macs 10.9 and higher do not have Java installed, which is required to install PrintSmith Vision. Download and install Java *before* starting the PrintSmith Vision Installer.

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.
- 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.

PrintSmith Vision Client Requirements

The requirements for running PrintSmith Vision on a client computer (one on which PrintSmith Vision is *not* installed) are:

<i>Operating system:</i>	Windows 7 Windows 8 Macintosh OS X 10.8 or higher
<i>Memory:</i>	4 GB minimum (more memory will improve performance)
<i>Browser:</i>	See “Browser Requirements” below.
<i>Monitor:</i>	See “Monitor and Resolution Requirements” on page 10.

Browser Requirements

The following browsers are supported for running PrintSmith Vision on a desktop:

- Internet Explorer 10 or 11

Note When using Internet 11 with Windows Server 2012 R2 Standard or Essentials, some additional configuration may be required. See the section on “Windows Server 2012 and Internet Explorer 11” in the *PrintSmith Vision Installation and Upgrade Guide*.

- Mozilla Firefox® 36.x or later

Note Do not use Firefox 37 or 38 on a Macintosh; a known issue prevents users from entering their PrintSmith Vision user name and password with this version of Firefox.

- Safari® 7.x or later
- Chrome® 41 or later

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

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 the 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 of installing 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 Guide*.

Fiery Integrations

If you are using PrintSmith Vision with a Fiery[®], Fiery JDF version 1.3.0.22 is required.

Digital StoreFront Integrations

If you are using PrintSmith Vision with Digital StoreFront[®], Digital StoreFront 8.4 is required to take advantage of the two-way integration introduced in PrintSmith Vision 3.0.

Mobile View Requirements

As of PrintSmith Vision 3.0, mobile views of parts of the PrintSmith system are available from smartphones and tablets. (For more information, see page 12.) 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:

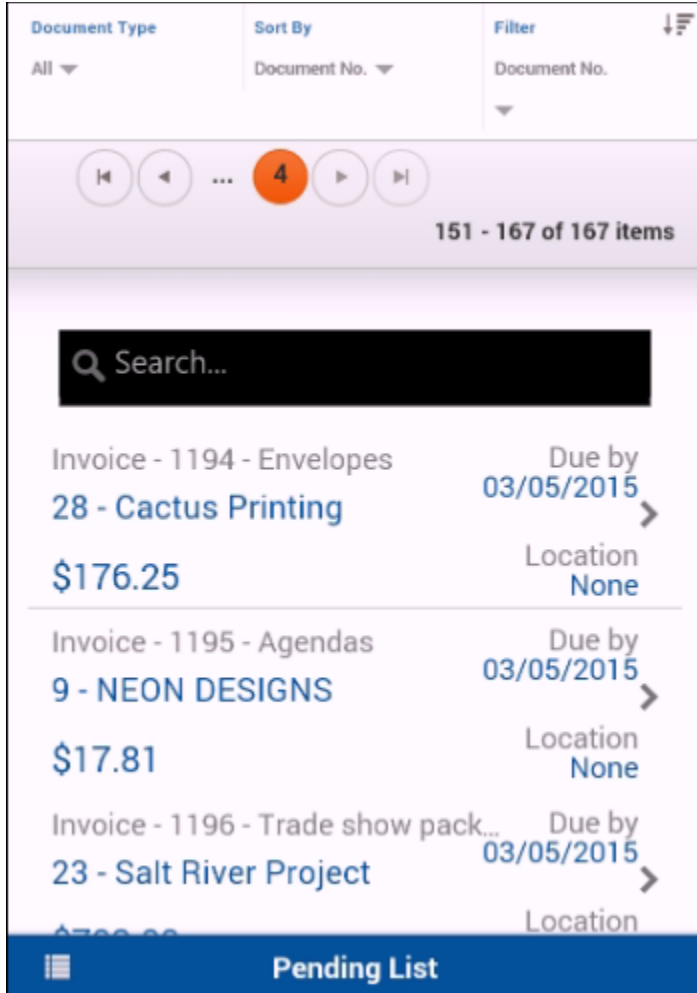
- Chrome 21 or higher
- Safari 5 or higher

Note Mozilla Firefox is *not* supported.

Enhancements

PrintSmith Vision 3.0 includes the following new features and enhancements.

Mobile Views



Using a mobile device such as a smartphone or tablet, you can now view summaries of parts of your PrintSmith Vision system:

- Pending List – your active estimates and invoices
- Work in Progress – work due in your shop with standard, weekly, and press weekly views available
- Account History – records of accounting activity for customers and prospects

The ability to use a mobile device to view this information while away from your desk or on the road means you can perform tasks such as check the status of a job, find contact information for a job, or review the history of an account.

Note For supported devices, operating systems, and browsers, see “Mobile View Requirements” on page 11.

Accessing the mobile views

To gain access to the PrintSmith Vision mobile views, you enter a URL in a supported browser on your mobile device. (For supported browsers and devices, see page 11.) This URL is very similar to the URL you normally use to access PrintSmith Vision, except the last part of the URL must be **PrintSmithMobile.html** (instead of PrintSmith.html):

http://IP address:port number/PrintSmith/PrintSmithMobile.html

where *IP address* is the address of your PrintSmith Vision server and *port number* is the port being used, for example:

http://192.168.1.142:9191/PrintSmith/PrintSmithMobile.html

Important To make use of the mobile views, you must have Wi-Fi access to your company network.

You then log in with your regular PrintSmith Vision user name and password.

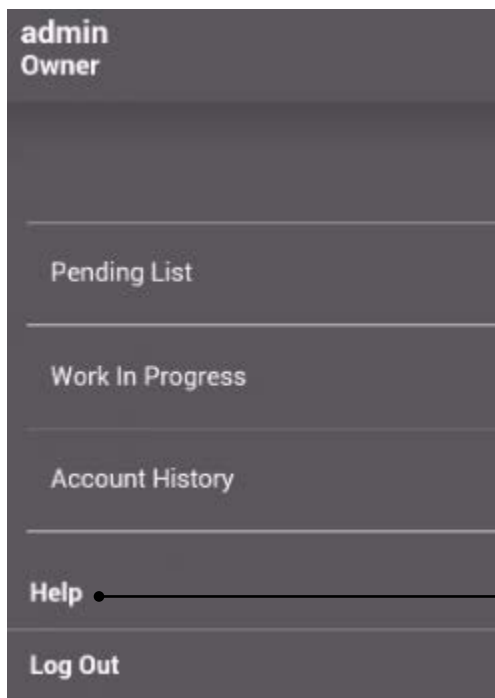
Note What you can view from a mobile device depends on your PrintSmith Vision permissions. For example, if you cannot view account history when running PrintSmith Vision on a desktop, you will not be able to view it from a mobile device either.

Using the menu

After you log in, the Pending List opens automatically.

Tap the menu icon  if you want to:

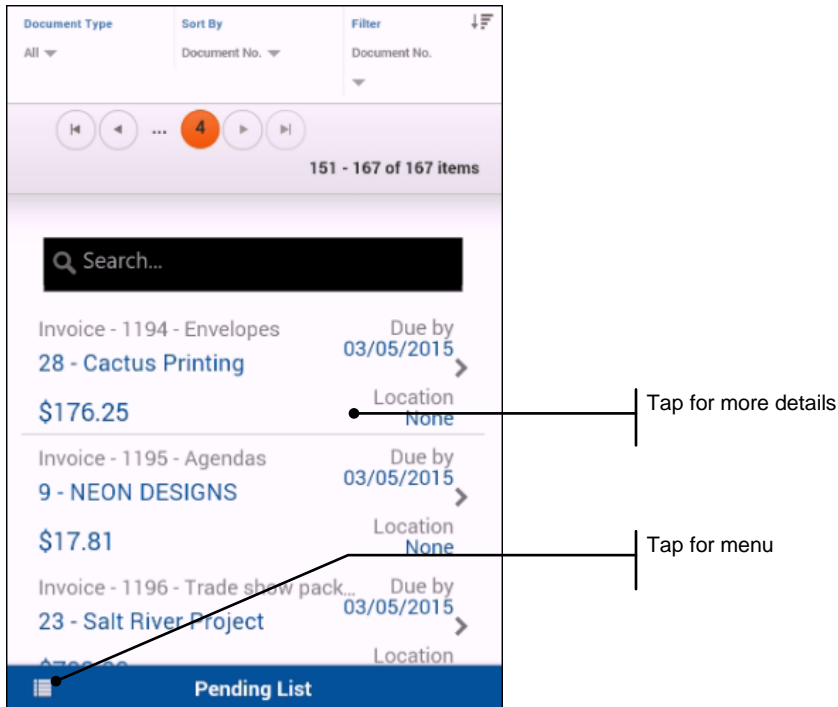
- Switch to another view
- View online Help
- Log out



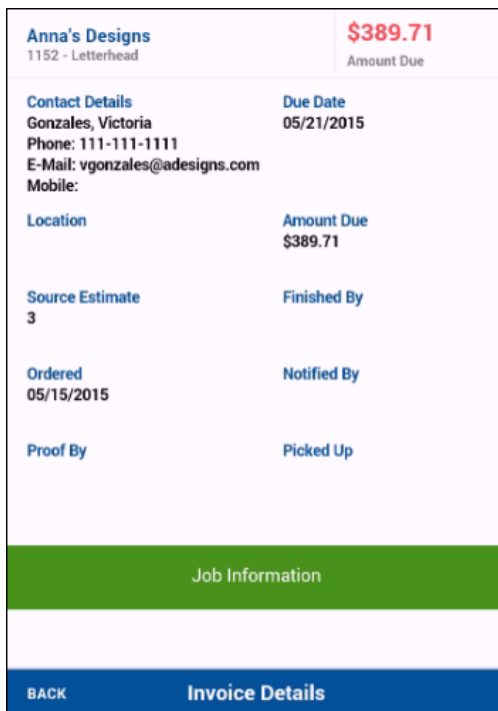
Tap for information about working with mobile views

Pending List

Here you can see a summary of your active invoices and estimates. Controls at the top of the page let you narrow down the list, sort the list, filter and search the list, and navigate through the list (50 items can be displayed at a time).



Tap a document to drill down for more details such as contact information in case you want to reach the customer:



Drill further down by tapping **Job Information** when viewing invoice details:

Anna's Designs		\$389.71
1152 - Letterhead		Amount Due
Customer Discount		\$0.00
Net Sub		\$360.84
Sales Tax		\$28.87
Shipping		\$0.00
Total		\$389.71

Letterhead	
Quantity	Price
1000	\$174.16

Envelopes	
Quantity	Price
1000	\$186.68

BACK Job Information

Work in Progress

Work in Progress includes three views: Standard, Weekly Schedule, and Press Schedule. In each case settings at the top of the page let you control what is displayed.

Just as with the pending list, you can tap a document for more details and then drill down for job information.

The Work in Progress standard view provides an overview of all orders with their due dates, locations, and amounts.

Report Type	Filter	
Standard	Document No.	
Sort By	Options	Include
Customer	All	Invoices

1 - 50 of 85 items

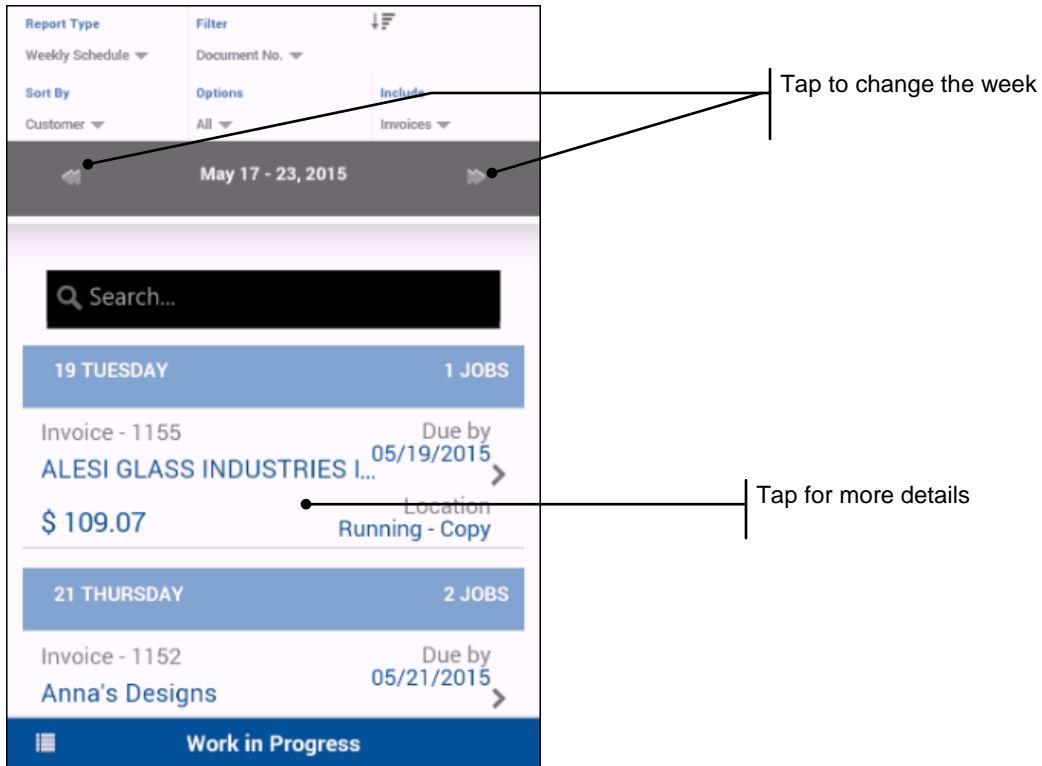
Q Search...

Invoice - 1155 - Route Maps	Due by 05/19/2015
3 - ALESI GLASS INDUSTRIE...	Location Running - Copy
\$ 100.99	
Invoice - 1210 - Flyer	Due by 06/04/2015
3 - ALESI GLASS INDUSTRIE...	Location None
\$ 93.55	
Invoice - 1146 - Manuals	Due by 06/05/2015
26 - Anna's Designs	Location
\$ 175.00	

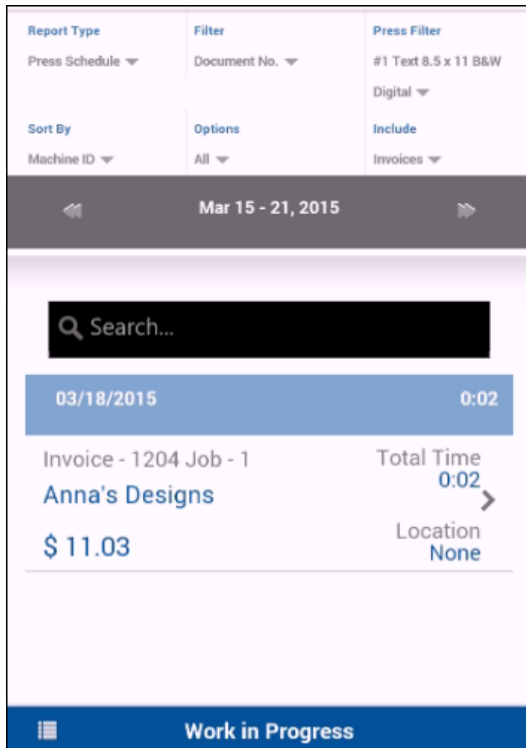
Work in Progress

Tap for more details

The Work in Progress weekly schedule view summarizes the jobs due during a particular week. By default the current week is shown, but you can display earlier or later weeks.



The Work in Progress press schedule view lets you see what is due to be run on a press or piece of digital equipment during a particular week. As with the weekly schedule view, you can change the week that is displayed and drill down through a document.



Account History

This view summarizes the accounting activity for a customer or prospect. You can check account history for payments, open invoices, deposits taken, and so on.

Filter
Account Name ▾

Customers Prospects

1 - 16 of 16 items

Search...

1 - <<< WALK-IN >>>

Current Balance	Merchandise Balance
\$ 0.00	\$ 0.00

3 - ALESI GLASS INDUSTRIES ...

Current Balance	Merchandise Balance
\$ 84,354.87	\$ 0.00

26 - Anna's Designs

Current Balance	Merchandise Balance
-----------------	---------------------

Account History

Tap an account for history details:

Show History Type: All types ▾
Sort By: Posted ▾
Filter: Posted ▾

1 - 17 of 17 items

Anna's Designs

Search...

Payment Visa(#006131)	Posted 08/14/2012
\$ -16.20	User / Rep System

Invoice - 1166 Bags	Posted 08/14/2012
\$ 16.20	User / Rep Ron

Payment CR CARD(#351924)	Posted 08/15/2012
\$ -16.20	User / Rep System

BACK Account History Details

Tip For more information about the mobile views, use online Help while in the views on your mobile device.

Backup Manager

Backup Manager preferences (**Admin > Preferences > System > Backup Manager**) were added so you can schedule daily backups of your PrintSmith Vision system or perform a backup right away (manually).

Backup Manager

Enable Automatic Backup Manager

Choose a backup destination:

i

Time of day to back up:

Number of backups to keep:

Warning before backup: seconds

Backup scheduled for:

Last backup performed: 6/8/2015 1:32:10 PM

When you use Backup Manager, the following are backed up:

- The PrintSmith Vision database
- The Scheduler database if you are licensed to use Scheduler
- All standard (EFI-supplied) and custom reports (including estimate and invoice reports)
- The DigitalAssetsRepository folder that contains all the content files that were uploaded for jobs

Backups are stored in a backup destination folder you specify.

Important! If the backup destination folder is on the same computer where PrintSmith Vision resides, always copy the backups to an external device, or take advantage of a cloud-based backup service. Otherwise, if the hard disk crashes, you will lose your backups along with your data.

Once you specify a backup destination folder you can:

- Click **Perform Backup Now** to back up your system right away.
- Configure backups to take place automatically at the same time each day. You can also control how much warning users are given before a backup begins and how many days of backups are kept.

Note If you need to restore your PrintSmith data from a backup for any reason, you use the Postgres pgAdmin utility just as before.

For details about configuring Backup Manager and restoring PrintSmith from backups, see the *PrintSmith Vision Setup and User Guide*.

Enhancements to the Integration with Digital StoreFront

The integration between PrintSmith Vision and Digital StoreFront® includes two major enhancements:

- Status information is now sent from PrintSmith Vision to Digital StoreFront to indicate whether an order is in production, shipped (complete), or canceled.
- A new credit card workflow ensures credit cards are charged the final invoice amount calculated in PrintSmith Vision.

Status updates

In previous releases, no order status information was sent from PrintSmith Vision to Digital StoreFront. The status had to be manually updated in Digital StoreFront.

The following events in PrintSmith Vision now trigger a change to the status of an order in Digital StoreFront:

- If you select a production location for an order using any of the available methods in PrintSmith Vision (using a bar code scanner, clicking **Location** in the Pending Documents window, and so on), the status of an order in the Order View in Digital StoreFront changes to **In Production**.

 4148 Danney Rogers	Status: In Production
Due: 6/5/2015 12:00 PM	Quote: \$22.40

Notes Digital StoreFront does not distinguish among different production locations in PrintSmith Vision. For example, if you first select Design as the location, the status of the order in Digital StoreFront changes to **In Production**. If you later select Bindery as the location, the order status in Digital StoreFront remains **In Production**.

If an order includes more than one job, the timing of the status change to **In Production** depends on how **Status changes for jobs and multipart orders** is set in Digital StoreFront (**Site Settings > Basic Settings**).

- When an invoice in PrintSmith Vision is marked ready for pickup, the status of the order in Digital StoreFront changes to **Shipped**, meaning the order is now complete. Likewise, when all the jobs are marked as **Delivered** on the **Status** tab in the Delivery Ticket window in PrintSmith Vision, the status of the order in Digital StoreFront changes to **Shipped**. *Except* for credit card orders, if the payment amount in PrintSmith Vision changed, this will *not* be reflected in Digital StoreFront.

 4148 Danney Rogers	Status: Shipped
Due: 6/5/2015 12:00 PM	Quote: \$22.40

- If you cancel an invoice in PrintSmith Vision *before* marking it ready for pickup, the status of the order in Digital StoreFront changes to **Canceled**. (You cannot cancel a shipped order in Digital StoreFront.)

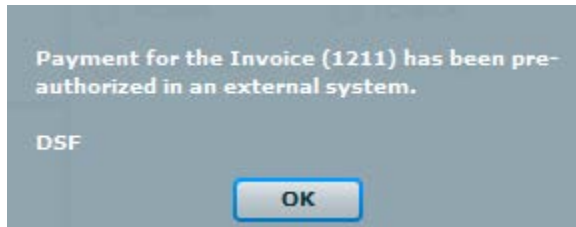
 4147 Danney Rogers	Status: Canceled
Due: 6/4/2015 7:30 PM	Quote: \$2.24

Credit card workflow

When buyers pay for an order with a credit card, the workflow is as follows:

1. Digital StoreFront contacts a payment gateway (configured in Digital StoreFront) to authorize the credit card payment, but the credit card is not charged now.
2. When the invoice is marked ready for pick up in PrintSmith Vision, the status of the order in Digital StoreFront changes to **Shipped**, but the card is not charged yet.

- When you pick up the invoice a message alerts you that payment was preauthorized in an external system (DSF for Digital StoreFront).



- After you click **OK** in response to the message and then post the invoice, the credit card is now charged the final invoice amount (as calculated in PrintSmith Vision).

Notes Digital StoreFront handles both the authorization and charging of a credit card, but the final charge amount comes from PrintSmith Vision.

Credit cards in Digital StoreFront must be configured to add a percentage – often 25% – to the amount in the shopping cart when a credit card is authorized. This is standard industry practice to cover additional costs such as taxes. The authorized amount is not the amount that is ultimately charged to the credit card. The buffer is necessary, however, because the card is charged the amount calculated by PrintSmith, which is likely to be higher than the original order amount (due to taxes, shipping, and so on.)

Setup

To take advantage of these new features, you must do the following:

- If your Digital StoreFront installation is self-hosted:
 - Upgrade to Digital StoreFront **8.4**.
 - Contact EFI Support. Support must run the enhanced integration script on your database to add some new values to the MIS Systems page in Digital StoreFront.

If your Digital StoreFront installation is hosted by EFI (cloud-based), this enhanced integration script will automatically be applied to your database.

After the script is run, the MIS Systems page for your MIS includes two new fields: **Site callback URL** and **Routing Identifier**.

- Copy the contents of these two new fields to the corresponding fields in the Integration preferences in PrintSmith Vision.

<input checked="" type="checkbox"/> Enable DSF Integration	<input type="button" value="Reset"/>	<input type="button" value="Check Now"/>
Web Services URL	<input type="text" value="shirleyf-vs2012/rel82/WebServices/OrderInfoXml.asmx"/>	
Facility Name	<input type="text" value="Vision"/>	
Shared Secret	<input type="text" value="XNu8Xhvh"/>	
Site Key	<input "="" type="text" value="Y9CMR4/OYFJ+Cj6Uc9WtgTVFX0A="/>	
Status Callback URL	<input type="text" value="?:SITEGUID=4c6bcdfe-0907-4f12-bb19-eb1585e026c8"/>	
Routing Identifier	<input type="text" value="RID"/>	

- Click **Save** and then click **Reset** to restart the connection between PrintSmith Vision and Digital StoreFront using the new settings. (You must click **Reset** to ensure that the status of orders is now updated in Digital StoreFront as certain events occur in PrintSmith Vision.)

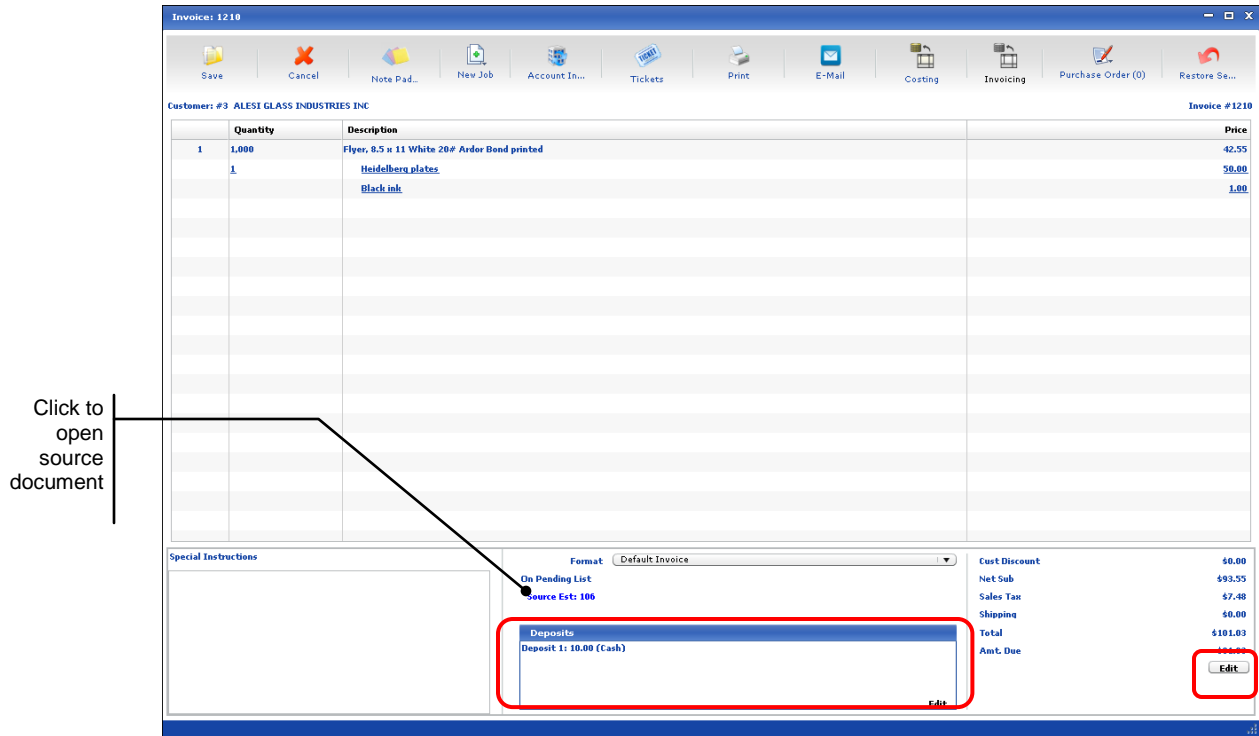
Notes For more information about setup, status updates, and credit card workflow, see the *PrintSmith Vision and Digital StoreFront Integration Guide*.

If you choose not to complete the integration tasks described above, single-way integration will continue to work as before, with no information flowing back to Digital StoreFront.

Invoice Window Enhancements

The following improvements were made to the Invoice window:

- The window can be re-sized and moved more easily so you can have more than one Invoice window open at a time. The size and position of the window are retained.
- The Invoice window was redesigned to display more items in the body of the window.
- The deposits area was redesigned. A **Deposits** label now makes its purpose clear and an **Edit** button is available for recording and managing deposits. (You can still click or double-click the area to open the Deposit Entry window if you want.)
- An **Edit** button was added to the totals area to clarify that you can open the Document Totals window from here. (You can still click or double-click the area to open the Document Totals window.)
- When a source document exists, you can now click it (for example, **Source Est: 106**) to open it.

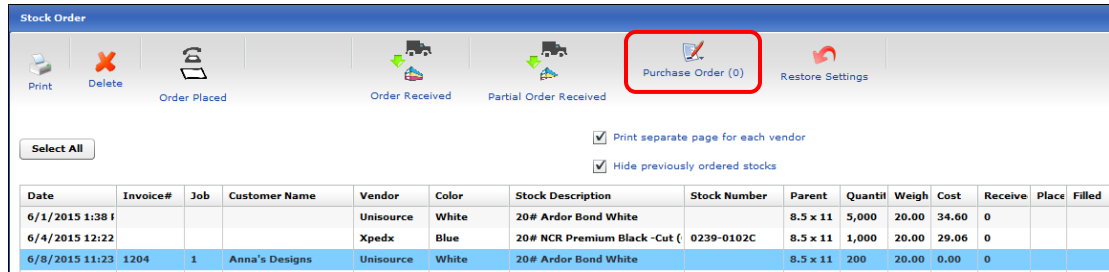


Purchase Order Enhancements

PrintSmith Vision version 3.0 includes the following enhancements to the purchase order workflow:

- **Integration with stock order workflow**

If you already manage and track your stock orders with **Admin > Order Stock** and **Reports > Stock Order**, you can now take advantage of a new **Purchase Order** button in the Stock Order window to create purchase orders for stocks you recorded with **Admin > Order Stock**.



The screenshot shows the 'Stock Order' window with a toolbar at the top. The 'Purchase Order (0)' button is highlighted with a red box. Below the toolbar is a table with columns: Date, Invoice#, Job, Customer Name, Vendor, Color, Stock Description, Stock Number, Parent, Quantil, Weigh, Cost, Receive, Place, Filled. The table contains three rows of data.

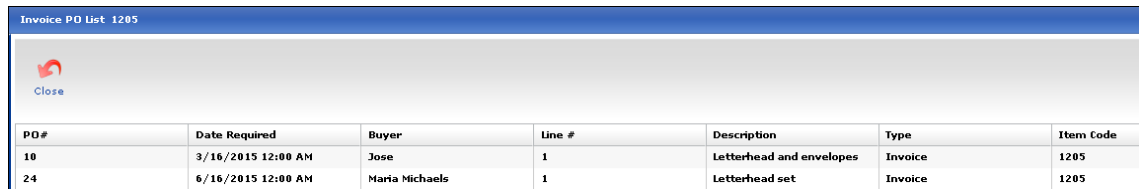
Date	Invoice#	Job	Customer Name	Vendor	Color	Stock Description	Stock Number	Parent	Quantil	Weigh	Cost	Receive	Place	Filled
6/1/2015 1:38 f				Unisource	White	20# Ardor Bond White		8.5 x 11	5,000	20.00	34.60	0		
6/4/2015 12:22				Xpedx	Blue	20# NCR Premium Black -Cut (0239-0102C	8.5 x 11	1,000	20.00	29.06	0		
6/8/2015 11:23	1204	1	Anna's Designs	Unisource	White	20# Ardor Bond White		8.5 x 11	200	20.00	0.00	0		

When you create a purchase order from the Stock Order window and then edit the purchase order to indicate it is complete, the **Received** column in the Stock Order window is automatically updated and * is displayed in the **Filled** column. Similarly, if you edit a line item in the purchase order to enter a **Partial Received** quantity, that quantity is reflected in the **Received** column in the Stock Order window.

Note A new setting was added to the PO Settings preferences to control whether purchase orders can be created from the Stock Order window.

- **List of all purchase orders created for an invoice**

When you have an invoice open, you can now select **Invoice > Invoice PO List**. The Invoice PO List window opens and displays all the purchase orders that were created for the invoice. You can double-click an invoice in the list to review it.

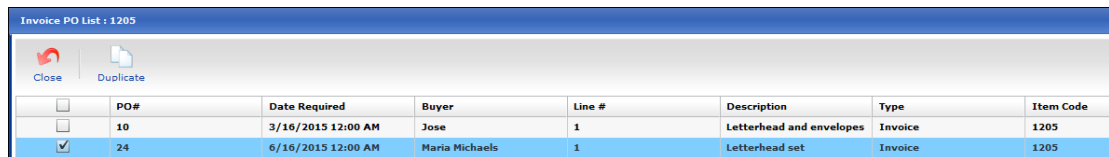


The screenshot shows the 'Invoice PO List' window with a table of purchase orders. The table has columns: PO#, Date Required, Buyer, Line #, Description, Type, and Item Code. There are two rows of data.

PO#	Date Required	Buyer	Line #	Description	Type	Item Code
10	3/16/2015 12:00 AM	Jose	1	Letterhead and envelopes	Invoice	1205
24	6/16/2015 12:00 AM	Maria Michaels	1	Letterhead set	Invoice	1205

- **Ability to copy purchase orders from historical invoices**

When you copy an invoice that includes purchase orders, you are given the option of copying some or all of the purchase orders to the new invoice. After you select **Invoice > Copy to New Invoice**, you are asked if you want to copy its purchase orders. If you click **Yes**, you can then select the purchase orders you want to copy to the invoice and click **Duplicate**:



The screenshot shows the 'Invoice PO List' window with a 'Duplicate' button and a table of purchase orders. The table has columns: PO#, Date Required, Buyer, Line #, Description, Type, and Item Code. There are two rows of data, with the second row selected.

PO#	Date Required	Buyer	Line #	Description	Type	Item Code	
<input type="checkbox"/>	10	3/16/2015 12:00 AM	Jose	1	Letterhead and envelopes	Invoice	1205
<input checked="" type="checkbox"/>	24	6/16/2015 12:00 AM	Maria Michaels	1	Letterhead set	Invoice	1205

You can then edit and re-issue the purchase orders in the new invoice.

For more information about the new purchase order features, see the *PrintSmith Vision Setup and User Guide*.

Business Calendar

The fiscal year that is specified in the Business Calendar preferences is now reflected in any reports that include sales history for the current or previous years, for example, the Account History and Account Ranking reports, as well as the **Sales Info** tab in the Customer window, the Dashboard, and so on.

Business Calendar

Fiscal year starts first day of January ▼

Current Range 1/1/2015 - 12/31/2015

A change to the business calendar will affect the way sales history is reported throughout PrintSmith Vision in terms of current and previous years.

Work days

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First Day of Work Week

Future dates exclude days that company is Closed

For example, if your fiscal year begins in April, the current year in reports will also begin in April. In the Dashboard, the range of the current year-to-date is now shown in the bottom left corner. In the figure below the fiscal year begins on January 1.

Pending Estimates (2,622.07)		Customer Log			
Estimate #	Customer	Description	Total	Created Date	Convert
89	Anna's Designs	Booklet	611.53	2/26/2015	Open
94	JAY E FISHMAN MD	Flyer	129.73	2/27/2015	Open
96	ORGANIC EXPRESS INC	Yellow copies	30.94	3/3/2015	Open
104	JETRION	Tradeshaw packages	1,053.00	3/10/2015	Open
98	NEON DESIGNS	Brochures	154.90	3/4/2015	Open

YTD Current Range: 2015/01/01 - 2015/05/28

More
All

When you change the fiscal year in the Business Calendar preferences, your account histories are rebuilt (a message informs you this is occurring).

Corrections

The sections that follow describe the corrections that were made in PrintSmith Vision version 3.0. For your convenience they are categorized.

General

- When there is a 5-minute or greater difference between the server and client date/time, users are now prevented from logging in until the date/time is manually corrected on either the server or client computer. If you change the time on the server, you must restart it for the change to take effect. (Ref. 15101)
- When a user is automatically logged out due to inactivity, the license is now freed up. (Ref. 15356)
- If you had i-net Designer installed, and you uninstall PrintSmith Vision, the Uninstaller automatically uninstalls i-net Designer if it was installed in the standard location. If you specify a custom path, Uninstaller removes *only* the i-net Designer components, not the entire contents of the specified folder. (Ref. 15116)

Imports

- If an invoice had a contact that was deleted in PrintSmith Classic, after the import to PrintSmith Vision, the contact is now identified as a temporary contact (instead of a deleted contact). (Ref. 15124)

Localization

- When English (UK) is the selected language, the values in the **Method** field in the List Price Schedule window are now displayed correctly. (Ref. 15192)

Charge Definitions

- When a charge has an underlying unit cost with a rate list, only the rate from the rate list is used in the price calculation. (Ref. 14460)

Stock Definitions

- The order in which colors are listed in the **Color** field in the Stock Picker window now matches the order of the colors in the Stock Colors table. (Ref. 15118)
- If you enter a new color in the **Color** field in the Stock Definitions window and click **No**, the color is retained in the stock definition but is not added to the Stock Colors table. (Ref. 10053)
- The price displayed in the Stock Picker window now includes four decimal places to match what is in the Stock Definitions window. (Ref. 13874)
- For improved readability, the color of the **Quantity on Hand** field in the Stock Picker window is now a darker shade of green. (Ref. 13908)
- The **Last Updated** field and expiration date are now updated after a full stock import. (Ref. 15316)
- After a stock import the **Last Updated** field is now always updated and the **Last Price Change** field is updated if prices changed. (15367)

Accounts

- If you select the **Search all accounts** check box in the Account Picker window, the setting will now be retained wherever it is applicable. (For example, it does not apply when selecting an account in the Cash Register, Post Payments, Journal Entry, and Generate Statements windows.) (Ref. 14945)
 - When logging your interactions with a customer (in the Notify Customer window or on the **Log** tab in the Customer window), you can now type a **Follow-up date** instead of selecting it on the calendar. (Ref. 15138)
-

- Changes made to the statement address for an account are now retained. (Ref. 15213)

Estimating

Invoices and Estimates

- If you tab through the Account Info window when creating an estimate or invoice, you no longer end up in the ****new**** field. You can, however, click the field to enter a document number. (Ref. 13529)
- An error no longer occurs if you try to save an invoice that you created for a prospect and added a new contact. (Ref. 15099)
- A duplicate invoice is no longer created if you create an invoice for a prospect and add a temporary contact. (Ref. 15100)
- If you select a contact for an invoice, and the contact is not assigned to an account, an error no longer occurs. Instead, a message informs you that contacts must be associated with accounts before they can be selected for invoices. (Ref. 15195,15209)
- To prevent errors from occurring, the system now checks for deleted addresses when you copy an invoice to a new invoice. (Ref. 15315)
- If you change the invoice address for an account and copy an invoice from history to a new invoice, the invoice address is now updated in the new invoice. (Ref. 14129)
- An error no longer occurs if a template name includes an apostrophe. (Ref. 15278)
- A tax rounding error no longer occurs in invoices. If the sales tax is incorrect in existing invoices, open the Document Totals window, click **OK**, and save the invoice. (Ref. 15207)
- The delivery ticket section in the Invoice window now handles long job descriptions better. A scroll bar is available if a job description consists of multiple line or if there are more than two jobs. (Ref. 15206)
- The due amount is now correctly updated in the Document Totals window. (Ref. 15102)

Jobs

- When the Job window opens, the focus is on the **Description** field. If you move to the **Ordered** field, the focus remains there. (Ref. 14292)
- You are now warned that semi-colons (;) cannot be part of the text for carton labels and asked to remove them. Semi-colons prevent the labels from being printed. (Ref. 14164)
- The **Show Logo** option was removed from the Delivery Ticket Layout window since logos are not controlled from here but are added with i-net Designer. (Ref. 14422)
- Long job descriptions no longer cause errors in delivery tickets. (Ref. 14072, 15188)
- The invoice number in the delivery ticket is no longer displayed with a separator (e.g., a comma for thousands). (Ref. 9079)

Purchase Orders

- If you entered buyers for purchase orders in PrintSmith Vision 2.4, they are now assigned IDs in the Buyer table when you upgrade to PrintSmith Vision 3.0. (Ref. 15097)
 - If you click **Special Order** when selecting a stock for a job, the **Purchase Order** button is no longer available in the Stock Definitions window. (Ref. 15096)
 - If you make the Purchase Order window smaller, the buttons for adding/deleting line items now stay visible. (Ref. 15075)
 - When creating a generic purchase order (with Generate Blank PO), you are now prevented from selecting the walk-in account. (Ref. 15135)
-

Accounting

- If a user exits the browser in the middle of a closeout or if the user is logged out due to inactivity, members of the system admin/owner groups can now end the closeout when they log into the system. (Ref. 13393,15139)
- When a journal entry is made for the walk-in account and the **Affect sales** check box is selected, the sales history for the account is now updated. (Ref. 14489)
- The Account Aging report no longer includes **Unapplied credits** if an account has no unapplied credit. (Ref. 15115)

Reports

Account History

- You can now select an item in the Account History window and use Shift+double-click to open the history details for the selected item (this is equivalent to clicking the **Properties** button). (Ref. 14004)

Account Ranking

- The Account Ranking report now correctly ranks the walk-in account if one of the following rankings is selected: Sales by sales category, Sales by date range, or Sales by category and date. (Ref. 15114)

Customer List

- When you run the Customer List report for **Posting Dates**, the **Invoice** column now shows either the invoice creation date or invoice pickup date (whichever is the most recent date). (Ref. 15129)

Work in Progress

- The size and location of the Work in Progress window are now retained. (Ref. 12972)
- Sorting by **Taken by** is no longer case sensitive so results are now correct. (Ref. 9598)

Mailing Labels

- When the **Account Source** for mailing labels is set to **Customer** and bar codes are included, the mailing labels are now generated. (Ref. 15359)
- An error no longer occurs if the **Account Source** is set to **Customer**, and you try to create a mail merge file. (Ref. 15361)

Administration

Table Editor

- When you sort entries in a table with Table Editor (by clicking a column heading), that sort order is now reflected in the corresponding fields in PrintSmith Vision. (Ref. 9180)
- If you change a **Name** in the Phone Tags table, the change is now reflected in the corresponding label in the Edit Contact window. (Ref. 14886)

Security

- If you use **File > Save As** to duplicate an access group, and then rename one of the groups, the other one is no longer also renamed. (Ref. 13864)
-

Credit Card Integration

- You can now remove a saved credit card for a contact. A delete button (✖) was added next to the **Card Number** field on the **Credit Info** tab in the Contact window. In addition, if you have turned on **Activate user event logging** in the System Behavior preferences, the user event log (**Admin > System Monitor > User Events**) now tracks when a credit card is saved for a contact and when a credit card is deleted. (Ref. 14482)

E-Mail Integration

- An e-mail suffix (after @) can now be up to 15 characters long, for example, **Help@My.Solutions.com**. (Ref. 15179)
- When a user definition includes an SMTP e-mail address and password, and that user e-mails a document to a customer, replies to that e-mail will be sent to that user. (Ref. 14302)

Preferences

- If you add a new sales category to the Sales Categories preferences without providing a name, you are now asked to enter a name when you try to save the preferences. If you choose not to save your changes, the new sales category is not saved. (Ref. 13249)

Tracker

- If the location associated with a press/copier/charge was deleted, you are prompted to choose a location when you start the job. (Ref. 15336)

Scheduler

- A job with a description longer than 1,000 characters can now be scheduled without an error occurring, but the job description in Scheduler is truncated to 200 characters. (Ref. 14351)
- Charges with long descriptions no longer cause errors in Scheduler. (Ref. 15198)
- When scheduling jobs that were imported from PrintSmith Classic, an error occurred if charges in the job were missing charge definitions. This was fixed. (Ref. 14961)
- For clarity and consistency, on the Schedule Board, the label **Output Devices** was changed to **Cost Centers**. (Ref. 14021)
- To support localization, you can now make changes to labels in Scheduler by downloading and editing the resource file and then uploading the changed file. (Ref. 15095)
- If you select a task in Scheduler and select **Change Duration of this Task**, the label in the next window is now **Task Duration**. (Previously it was **Shut Duration**.) (Ref. 14305)
- Scheduler permissions now work correctly when user names in PrintSmith include special characters. (Ref. 14627)
- An error no longer occurs if you cancel an invoice that has tasks that were released to production. (Ref. 13966)

Digital StoreFront Integration

- A rush fee for a Digital StoreFront order is now added to the first job's production amount (in the Production Data window) and is also reflected in the invoice total. The shipping amount calculated by Digital StoreFront is now the **Shipping** line item in the Invoice window and is added to the invoice total. (Ref. 15132, 15134)
 - The price adjustment in the Web Worksheet window is now rounded to two decimal places. (Ref. 14995)
 - When a walk-in buyer places an order in Digital StoreFront, the tax settings specified for the walk-in account in PrintSmith Vision are now used. (Ref. 15298)
-

- When a walk-in order comes into PrintSmith Vision, the Account Info window now shows the account status and type after an account is selected. (Ref. 13858)

Fiery Integration

- The job ticket link that is sent as part of the JDF ticket can now be used to print the job ticket. (Ref. 14948)

PrintSmith Site Integration

- You can now delete a delivery ticket for a PrintSmith Site order without receiving any unnecessary messages. (Ref. 14321)
- If a payment method requires a purchase order, that requirement is now retained. (Ref. 14905)
- The correct shipping address is now shown for orders coming in from PrintSmith Site. (Ref. 14965)
- If you remove a graphic for a category by entering a blank, the graphic is now removed from the site. (Ref. 14986)

Four51 Integration

- When a multiplier is used to specify a quantity when placing the order, the ordered quantity in PrintSmith Vision now reflects the multiplier. (Ref. 15310)
-