

**efi** PrintSmith Vision™



Release Notes

PrintSmith™ Vision  
Version 3.1  
October / 2015

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EFI PrintSmith Vision | *Release Notes*

October 2015 PrintSmith Vision 3.1

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## About this Document

This document describes the enhancements and corrections that were made in PrintSmith™ Vision 3.1.

## Contact Information

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

### EFI Customer Care Site

<https://customer.efi.com/support>

Use the EFI Customer Care site to report issues, as well as to track the status of issues you reported.

**Important** You need a user name and password to log into the EFI Customer Care site. Please contact your Customer Support representative to have an account created for you.

### 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](mailto:printsmith.support@efi.com)

## Important Information – Read This!

### UK Customers

If you are *either* updating PrintSmith Vision to 3.1 *or* installing PrintSmith Vision for the first time, *contact PrintSmith Support (as described on page 5) right after you update or install the software.* Support will ensure that the date format and tax descriptions are localized in reports.

### 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 8.1.28 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 3.1, you must be at version **3.0**. You cannot update directly from an earlier version of PrintSmith Vision.

**UK customers:** *please contact PrintSmith Support right after you update PrintSmith Vision.*

### Before you start the update

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

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

---

## Known Issue: 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**).



# 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 10 ( <i>Be sure to read "Windows 10: Important Information" on page 25.</i> ) 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*.

**Important** As of PrintSmith Vision 3.2, Windows 7 and Windows Server 2008 will no longer be supported.



## 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-3.1 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 3.1 *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 Windows 10 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® 40.x or later
- 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<sup>®</sup>, Fiery JDF version 1.3.0.22 is required.

## Digital StoreFront Integrations

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

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## 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® 4<sup>th</sup> and 5<sup>th</sup> 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 3.1 includes the following new features and enhancements.

### SugarCRM Integration

PrintSmith Vision is now integrated with SugarCRM® Professional.

Sugar Professional is a CRM system that lets you control and track your customer relationships to improve customer satisfaction as well as to increase your sales. With Sugar you can manage your customers, contacts, and prospects; understand the markets your customers are in and what they buy; and track your interactions with customers. You can use the information provided by Sugar to market and sell your products more effectively.

When PrintSmith Vision and Sugar are integrated, information about customers, prospects, and contacts is synchronized between the two systems. When an addition or change is made in one system, it is reflected in the other system. For example, if a new customer is entered in Sugar, a customer is created in PrintSmith Vision, and vice versa.

**Notes** Sugar integration is an optional PrintSmith Vision module that requires a license for a particular number of CRM users.

Sugar is hosted for you by EFI – you access Sugar via a browser.

After you purchase a CRM license, you will contact PrintSmith Support to get your Sugar site set up. Once this is done, setup involves:

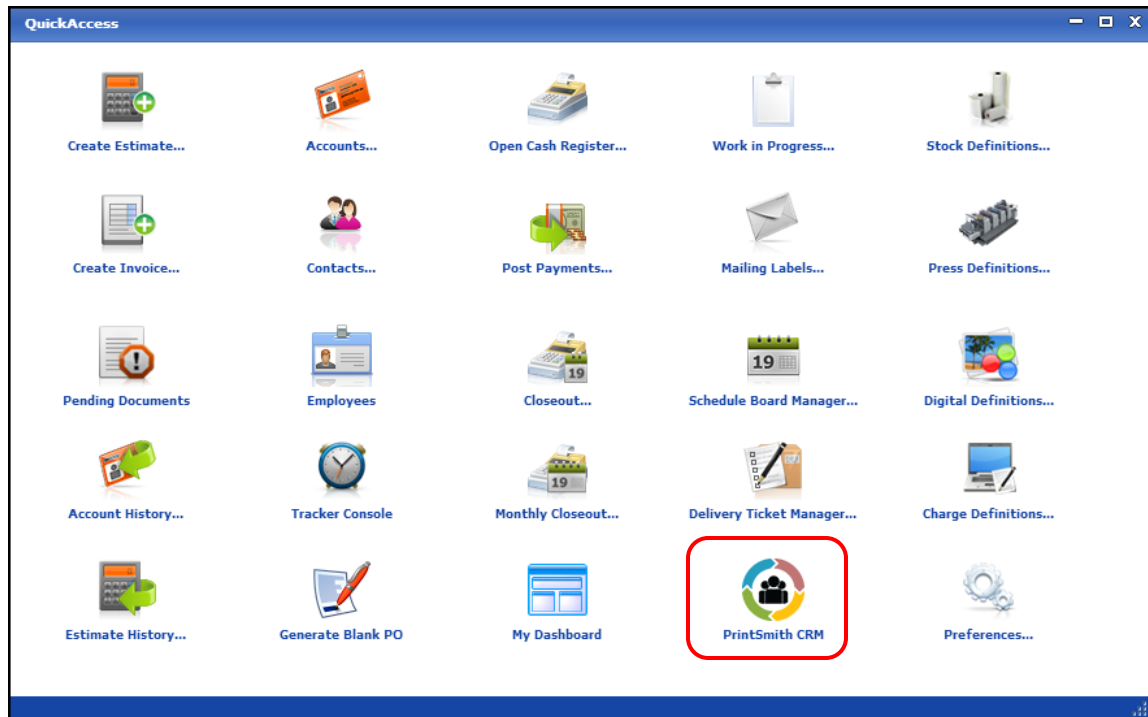
- Activating your license in PrintSmith.
- Enabling the Sugar CRM integration in the Integration preferences in PrintSmith Vision.

- Defining your CRM users (up to your license limit) in the User Definitions window in PrintSmith Vision. (E-mail must be configured in PrintSmith Vision before you can define CRM users.)

User Name	Access Group	Access Level	CRM Security Role
<NO NAME>	System Admin	99	
*admin	Owner	99	EFI Professional Admin
Counter	Counter	60	
Dave	System Admin	99	
Dhina	Tes	0	
Lori	Counter	60	EFI Professional Standard
Manager	Manager	80	

After CRM users are defined in PrintSmith, users receive an e-mail with the URL of their Sugar site, as well as their Sugar user name and password. They can then log into Sugar and start to use it.

Users can always access Sugar by clicking **PrintSmith CRM** in the QuickAccess panel in PrintSmith Vision:



Once PrintSmith Vision and Sugar are connected, information about accounts and contacts is synchronized between the two systems.

For example, here is an account in Sugar:

Ac Anna's Designs ☆ Follow	
Assigned to	Customer
	Office Phone 111-222-4444
Billing Address 1 Ivy Lane Cambridge, MA 02138 USA	Shipping Address 1 Ivy Lane Cambridge, 02138 USA
Alternate Phone	Email
Fax	Campaign
Twitter Account	
Description	
SIC Code	Ticker Symbol
Annual Revenue 755000	Employees 16

In PrintSmith, some of the mapped information is on the **Address** tab and some on the **Marketing** tab:

**Customer #34 Anna's Designs**

Navigation: Previous, Next, New, Save, Get, Revert, Delete

Tabs: Address, Credit Control, Settings, Sales Info, Log, Notes, Marketing, Templates, Web

Acct # 34      Name: Anna's Designs

External Ref #:

External Accounting ID:

Main Switchboard Phone:

**Invoice Address**  
 Anna's Designs  
 1 Ivy Lane  
 Cambridge 02138

**Statement Address**  
 Anna's Designs  
 1 Ivy Lane  
 Cambridge MA 02138

**Invoice Contact**  
 Victoria Gonzales  
 Manager  
 Phone: 111-222-3333  
 Mobile: 111-222-4444  
 E-Mail: vgonzales@AnnaDesigns.com

**Customer #34 Anna's Designs**

Navigation: Previous, Next, New, Save, Get

Tabs: Address, Credit Control, Settings, Sales Info

Customer       Personal Account  
 Prospect       Do not mail

**Company**

Number of Employees: 16

Annual Revenue: 755,000.00

Business Type:

Similar mapping is done for contacts.

For information about configuring the integration with Sugar and understanding what account and contact data is synchronized, see the *PrintSmith Vision and SugarCRM Integration Guide*.

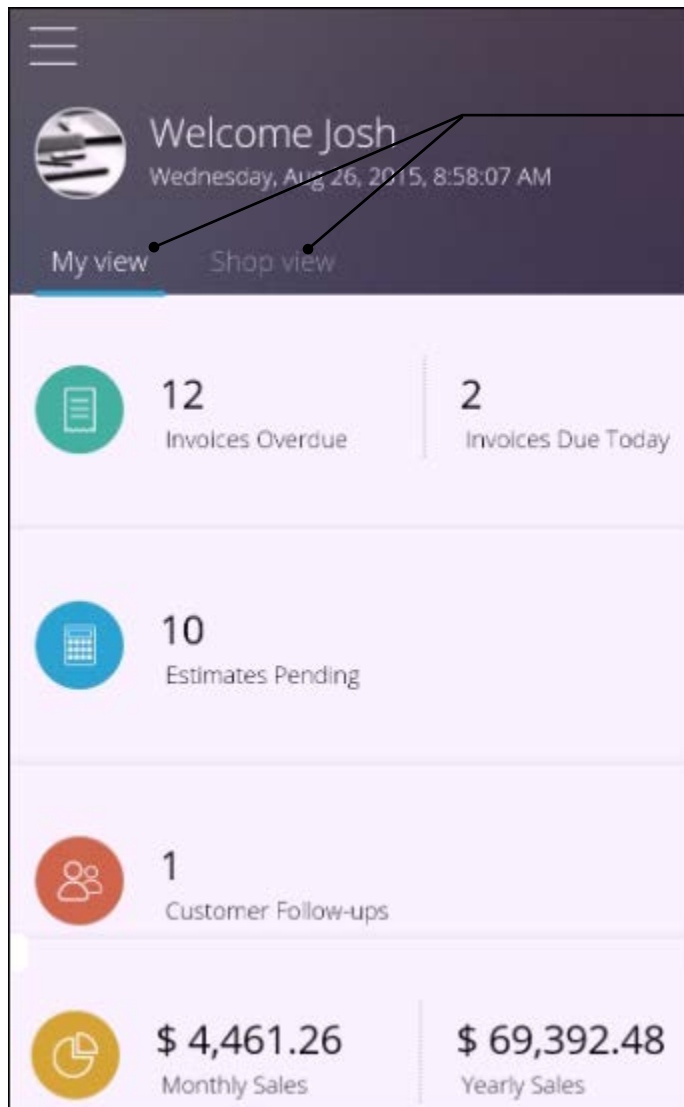
## Mobile Views

### Dashboard

A new Dashboard is available in PrintSmith Vision 3.1. The Dashboard opens automatically after you log into the mobile views (if you have permission to view the Dashboard).

The Dashboard displays some statistics: the number of invoices due today, overdue invoices, pending estimates, and customer follow-ups you (the logged in user) have. In addition, if you have permission to view them, you can see monthly and yearly sales to date. This is **My view**. To see the same information for the entire shop you can tap **Shop view**.

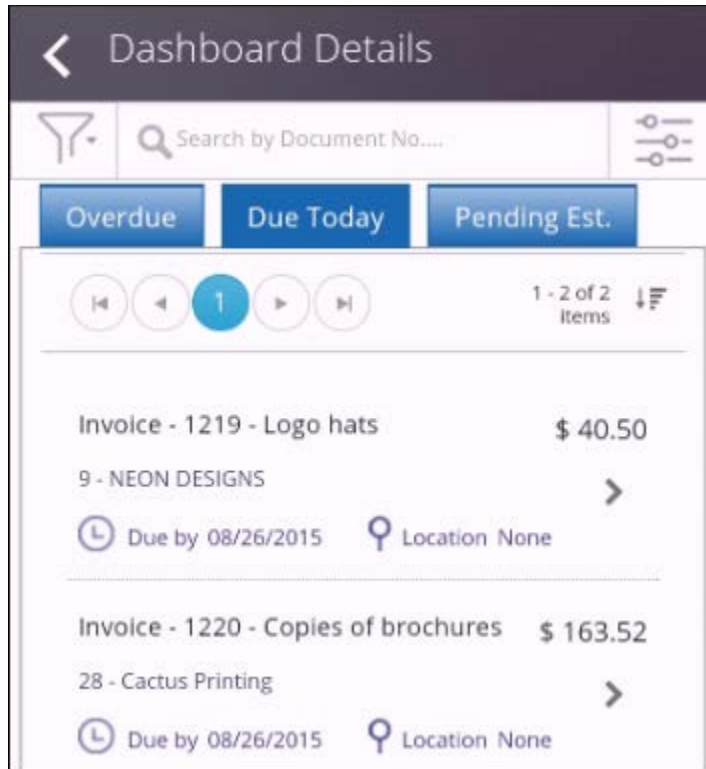
**Note** A new security permission (**Show shop data on mobile dashboard**) controls who can see shop information. Members of the owner and system admin groups automatically have this permission.



Switch between your data and that for entire shop

For details, you can tap **Invoices Overdue**, **Invoices Due Today**, or **Estimates Pending**. The Dashboard Details page opens.

**Notes** The Dashboard shows you how many customer follow-ups you have, but you cannot view the details from a mobile device. For details of follow-ups, use the desktop version of PrintSmith Vision. The Dashboard Details that are displayed depend on whether **My view** or **Shop view** was selected on the Dashboard page.



When viewing dashboard details, you can:

- Tap **Overdue** to see all the invoices that have a due date in the past.
- Tap **Due Today** to see the invoices that are due today.
- Tap **Pending Est.** to see all active estimates. These are quotes that either were not yet accepted by the customer or were accepted but were not converted to invoices yet.

In addition, just as in other mobile views, you can:

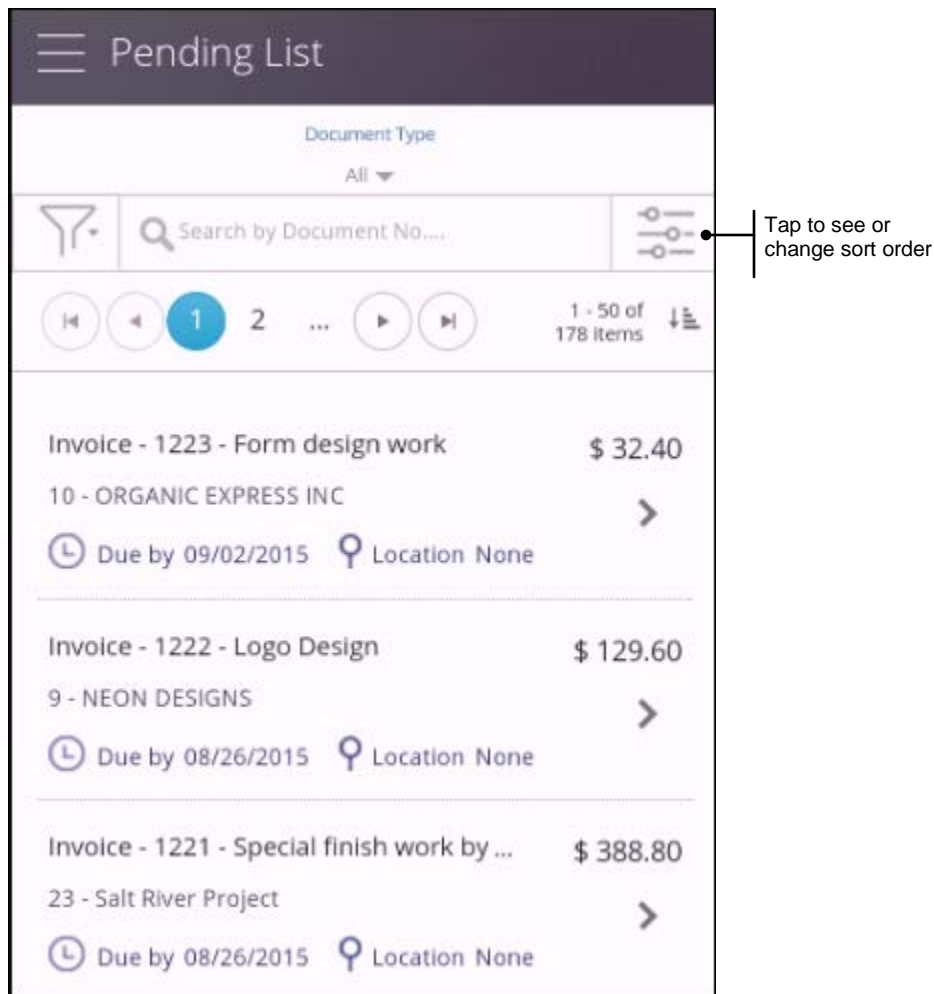
- Use the controls at the top of the page to find particular documents or sort the list.
- Use the navigation bar to navigate through the list.
- Tap a document to see invoice details including contact information.
- Review job information – a summary of the jobs in a document.

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




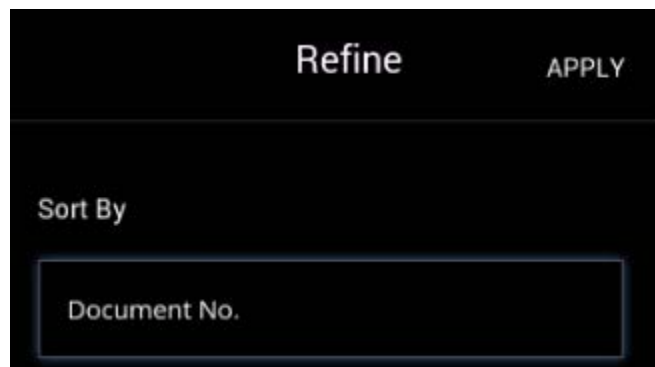
## Appearance

Changes were made to the appearance and layout of the views.



In some cases the way you perform tasks is slightly different, but the underlying functionality remains the same. For example, to sort items in a view, you now do the following:

1. When  is available at the top of a page, tap it to see the current sort order or to change it. The Refine page opens. The choices you get depend on the view you were in.



2. You can then tap the current selection under **Sort By**, select something different, and tap **APPLY**.

For Work in Progress, the Refine page also has **Options** and **Include** settings that you can change:

Refine APPLY

Sort By

Customer

Options

All

Include

Invoices

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

## Simplified Procedures for Customizing Documents

Several changes were made to simplify the process of customizing documents, in particular statements, credit memos for journal entries, and estimates/invoices.

### Ability to customize statements without Report Manager

You no longer need to have Report Manager if you want to customize statements with a logo and minor formatting changes. Instead:

1. On the **Form Layout** tab in the Generate Statements window, select the layout options you want to use. These correspond to an EFI-supplied report, which is identified in the **Associated Report** field. (For example, **Use pre-printed form** and **Standard Format** correspond to **EFI\_Statement.rpt**.)
2. Click **Download**. The report is placed in your Downloads folder.
3. Open the downloaded report in i-net Designer with **File > Open** and use **File > Save As** to save the report under another name (the name cannot begin with EFI\_.)
4. Add your logo and make any other minor formatting changes (for example, change the font). Then save the report.
5. Back on the **Form Layout** tab in the Generate Statements window, click **Override** and locate the report you just customized. The name of this report will now be displayed in the **Associated Report** field and your printed statements will reflect your customization.

The screenshot shows the 'Form Layout' tab of the Generate Statements window. It features several radio button options for report layouts. The 'Use pre-printed form' and 'Standard Format' options are selected. Below these options is a text box labeled 'Associated Report' which contains the text 'EFI\_Statement.rpt'. At the bottom of the window are three buttons: 'Override', 'Download', and 'Remove'.

**Note** For more information about customizing statements, see “Customizing your statements” in the *PrintSmith Vision Setup and User Guide*.

### Customizing credit memos for journal entries

The procedure for customizing credit memos was changed slightly to be similar to statements – you no longer have to find a report in the report repository folder. Instead, if you want to customize the credit memo (which is based on **EFI\_JournalEntry.rpt**), you do the following:

1. Open the Journal Entries preferences and click **Download**. **EFI\_JournalEntry.rpt** is placed in your Downloads folder.
2. Open the downloaded report in i-net Designer with **File > Open** and use **File > Save As** to save the report under another name (the name cannot begin with EFI\_.)
3. Add your logo and make any other minor formatting changes (for example, change the font). Then save the report.

4. Back in the Journal Entries preferences, click **Override** and locate the report you just customized. Its name is displayed in the **Associated Report** field.
5. Save the preferences.

**Journal Entries**

Print Document

Select the format (defined in Document Preferences) that has the settings you want to use for your credit memos

Journal Document Preference: Default Journal

Click Override to select the report layout you want to use for your credit memos

Associated Report: EFI\_JournalEntry.rpt

Override Download Remove

**Note** For more information about customizing credit memos for journal entries, see “Customizing credit memos for journal entries” in the *PrintSmith Vision Setup and User Guide*.

## Customizing estimates and invoices

To streamline the process of editing estimate and invoice reports, the Document Preferences window has a new **Upload/Download** tab.

Page Header Body Footer Text **Upload/Download**

Report file to download: EFI\_DefaultInvoice.rpt

Upload Download

To edit a report file, you no longer have to find a report file in the invoice repository folder. Instead, you can select it in the **Report file to download** field and then click **Download**. The file is placed in your Downloads folder.

After you edit the report with i-net Designer and give it a different name, you then click **Upload** on the **Upload/Download** tab to place the report file in the invoice repository. (The report file you upload cannot begin with EFI\_.)

After you upload a file, it is available as a selection in the **Associated Report** field on the **Page** tab of the Document Preferences window so you can associate the report with a set of document preferences as usual.

The screenshot shows the 'Document Preferences' dialog box with the 'Page' tab selected. The 'Format Name' is 'Special Invoice' and the 'Format Type' is 'Invoice/Estimate'. The 'Associated Report' field is set to 'SpecialInvoice.rpt'. A callout box points to this field with the text: 'Report files you upload from the Upload/Download tab are available as selections here.'

**Document Preferences**

Format Name: Special Invoice

Format Type:

- Invoice/Estimate
- Credit Memo

Page | Header | Body | Footer | Text | **Upload/Download**

Print form image       Hide alternate currency

Print document type       Format name is document type

Print custom order number

Print store address

Add amount due line

Remove shipping line

Remove tax line

Print tax name from table

Print standard text in remarks

**Associated Report**: SpecialInvoice.rpt

New      Delete      OK      Cancel

Report files you upload from the **Upload/Download** tab are available as selections here.

## Enhancements to Digital StoreFront Integration

PrintSmith Vision 3.1 includes the following enhancements to the integration with Digital StoreFront:

- Content files for a Digital StoreFront order are now listed in the Digital Assets window in PrintSmith Vision where you can preview them. In addition, if the job is submitted to a Fiery, the digital assets information is sent to the Fiery so the job can be produced.

Name	File Form	Repository Path	Date
DigitalAssetDSFFile375681.pdf	pdf	http://dsfprintsmith/DSF/PreviewPdf.ashx...	8/5/2015 11:31

Buttons: Cancel, OK, Remove, Add, Show Preview

- PrintSmith Vision checks every 5 minutes for orders from Digital StoreFront. You can now decrease or increase this **Polling interval** in the Integration preferences. The maximum number of minutes you can set is 10.

**Note** For a new polling interval to take effect, you must click **Reset** and then **Save** in the Integration preferences.

Enable DSF Integration

Buttons: Reset, Check Now

Web Services URL: shirleyf-vs2012/rany/WebServices/OrderInfoXml.aspx

Facility Name: Vision

Shared Secret: XNu8Xhvh

Site Key: Y9CMR4/OYfJ+Cj6Uc9WtgtVFX0A=

Status Callback URL: shirleyf-vs2012:80/rany/AsyncCommHandler.ashx?SITEGUID=4c6bcd...

Routing Identifier: Vision20150623

Polling Interval: 5 (minutes)

## Additional Account and Company-Related Fields

### Customer Window

New fields are available on several tabs in the Customer window.

#### Address tab

The **Address** tab includes a new **Main Switchboard Phone** field. You can use this for the central phone number for a customer.

Address	Credit Control	Settings	Sales Info	Log	Notes
Acct # 26	Name	Anna's Designs			
	External Ref #				
	External Accounting ID				
	Main Switchboard Phone				

#### Credit Control tab

The **Credit Control** tab now includes a **Royalty Exempt** check box. In a franchise situation, you can select the **Royalty Exempt** check box if jobs for the account are not subject to royalty payments. (Ignore this check box if royalty payments do not apply to you.) The check box is displayed only if you are a member of the owner or system admin access group.

**Note** Individual invoices can be flagged as royalty exempt (or non-exempt) in the Document Totals window.

Address	Credit Control	Settings	Sales Info	Log	Notes	Marketing	Templates	Web
	Credit Limit	5,000.00						
	Due days from posting	5	Avg. Days to Pay					
	Monthly Finance Charge Pct	0.00%	(Using standard rate of 1.50%)					
	Finance Charges YTD	0	<input type="checkbox"/> Never calculate finance charges					
	Current Balance	11.34	<input type="checkbox"/> Royalty Exempt <input type="checkbox"/> National Pricing					

**Note** The **National Pricing** check box is for future use to indicate whether the customer uses standard corporate-wide pricing or specialized pricing.

#### Marketing tab

The **Marketing** tab has a new **Custom Data** section.

Custom Data	
Ref 1 Desc	Business Number
Ref 2 Desc	Business Account
Ref 3 Desc	Membership
Freq Flyer 1	LinkedIn
Freq Flyer 2	Company Web Page

The **Custom Data** fields are text fields that can be used for *any* purpose (up to 255 characters per field). The labels of the fields shown in the figure above are the default labels, but you can change these to anything you

want by editing the Account Custom Labels table with Table Editor. (You can edit the records in the Account Custom Labels table, but you cannot delete or add records.)

### Contact Information

When editing contacts, new social media and home phone fields are available for including more information about contacts:

**Edit Contact**

**First** Victoria

**Last** Gonzales

**Prefix**  **Suffix**

**Phone:** 111-222-3333 **Fax:**

**Mobile:** 111-222-4444 **Other:**

**E-Mail** vgonzales@AnnaDesigns.com

**Twitter**  **Facebook**

**Web Site**

**Home Phone**

**Job Title** Manager

**Salutation**

### Company Preferences

The company preferences include a new section for banking information:

**Company**

**Address**  
SuperPrints  
1 James Avenue  
Cambridge MA 02139

**Phone** 333-333-3333 **FAX** 333-333-3334

**E-Mail** sales@SuperPrints.com

**Banking Info**

**Bank Description**

**Bank Routing Number**

**Bank Name**



## Requiring a Product for Jobs

You can now require users to select a product for all jobs. The Estimator Behavior preferences include a new **Make Product field required for all jobs** check box.

**Estimator Behavior**

- Close source document after copying
- Enter Stock Cost in Estimator
- Can change address on ALL documents
- Auto show Paper Calculator on new jobs
- Always use Stock's Parent Size
- Calculate Re-order date on invoice copy
- Validate sales rep
- Leave Folded size empty on new jobs.
- Do not perform Costing during invoice POST
- Make Product field required for all jobs**
- Auto show Charges on new jobs
- Never use preset press on stock changes
- Add fixed waste for each pass (Affects historic documents)
- Add fixed waste for each color (Affects historic documents)
- Calculate INK by Impressions, includes waste. (Affects history)
- Use the History title for new document title
- History view should always default to "This Year" when opened.
- Show Word count in the job ticket notes window
- Do not ask about updating prices for jobs copied from a document in history
- Close Invoices and Estimates after sending email

**Normal due date (days)**  (Changes will be reflected upon reopening the Web Administration window)

When this check box is selected, users cannot save a job until they select a product for it.

## Windows 10: Important Information

Windows 10 is now supported for both the PrintSmith Vision server computer and client computers.

### Existing PrintSmith Vision installations

*During an upgrade to Windows 10, PrintSmith Vision is currently removed so you will lose your PrintSmith system unless you follow these steps:*

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.* For information about deactivating your license, see "Deactivating a license" in the *PrintSmith Vision Installation and Upgrade Guide*.
3. Uninstall PrintSmith Vision.

4. Upgrade your operating system to Windows 10.
5. After the operating system is upgraded, install PrintSmith Vision with the **UPGRADE** (not NEW USER) option 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*.

## **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*.

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## Corrections

The sections that follow describe the corrections that were made in PrintSmith Vision version 3.1. For your convenience they are categorized.

### General

- Some changes were made to improve overall performance. (Ref. 15531)

### Imports

- The export from PrintSmith Classic was fixed (in version 8.1.28) so that data imported to PrintSmith Vision is no longer missing costing information. (Ref. 15454)
- When PrintSmith Classic (8.1.28) ages accounts before exporting data it now ignores the **Inactive acct to prospect** and **Mark inactive account** aging settings. (This prevents customers from being converted to prospects.) (Ref. 15423)
- If you used Tracker in PrintSmith Classic, the start date of jobs/charges is now imported into PrintSmith Vision. (Ref. 15542)
- For walk-in invoices imported from PrintSmith Classic, the Account Info window now displays the **Account Status** and **Account Type**. (Ref. 15622)

### User Definitions

- The **User Name** field in the User Definitions window can now include up to 40 characters. (Ref. 15638)

### Charges

- When a charge is based on **In Sets** and includes a waste chart, the waste is now calculated correctly when the charge is used in a job. (Ref. 13888)
- The estimated cost (in the Costing window) is now calculated correctly for job aware charges that use **Number of Sets/Setup**. (Ref. 15372)

### Stocks

- The blank stock markup is no longer zeroed out if the parent sheets required are fewer than the minimum quantity defined for blank sheet pricing in the Stock Definitions window. (Ref. 13962)
- When you auto-order stock based on the pending list, the preview now correctly reflects the invoice and job number sequences. (Ref. 12589, 14154)
- When you auto-order stock based on the pending list, and a stock does not include a color, the color field in the preview now remains blank instead of being set to the color of the previous stock. (Ref. 15214)
- When you auto-order stock and select both the **Pending List Items** and **Search for low stock inventory items** check boxes, the pending list items are now processed first. (Ref. 14155)
- When you order stock manually (**Admin > Order Stock**) for an invoice, the cost of the stock is now calculated correctly. (Ref. 14080, 15528)
- When you order stock for an invoice, and the stock has a minimum order amount, the order quantity is now calculated correctly. (Ref. 15678)

### Accounts

- If you change the **Account Status** and **Type** for the walk-in account, those settings are now retained when you create an invoice for the walk-in account. (Ref. 15626)
-

- The number in the **Annual Revenue** field on the **Marketing** tab in the Customer window is now correctly retained. (It is no longer fractionalized.) (Ref. 15624)
- In the Account Picker window, you can now double-click anywhere on a line to select the account. (Ref. 13187)

## Estimating

### Invoices and Estimates

- You can now filter the Pending Documents window for walk-in accounts by setting **Customer#** to 1. (Ref. 15230)
- When a contact assigned to an invoice is deleted from the system, all the contact information is now retained in the Account Info window for the invoice, but as a temporary contact. Previously, only the name was retained. (Ref. 15425, 15468)
- When a contact has **Use Contact Address** selected, and the contact is selected for an invoice, the contact's address is now used instead of the account address in the **Invoice Address** field in the Account Info window. (Ref. 15461)
- In some situations the message about an estimate or invoice being successfully saved was remaining on the screen. This no longer happens. (Ref. 13665)
- When a multi-part job with multi-quantities includes an outside service subjob, the prices in the printed estimate are now correct. The outside service job is no longer added on top of the correct multi-quantity prices. (Ref. 14507, 15533)

### Jobs

- If the **Ordered** quantity is not changed, the **Press** quantity no longer changes if you tab through the fields a second time (or click the **Ordered** field). (Ref. 15654)
- When selecting a vendor for an outside service job, you can now type more than one character to match those characters in the vendor name. (Ref. 13386)
- In some situations, a job description you entered was reverting to the job method being used. This no longer happens. (Ref. 14138)
- When you create a large format job, you can now enter a **Cutoff** greater than 999. (Ref. 15163)
- When a list-based job includes a job aware charge (e.g., for plates) with **Colors** selected under **Select values in job to be used in calculating price**, the price of the job is now calculated correctly. (Ref. 15212)
- If you create a multi-part job and click out of the **Overs Unit Price** field, the screen no longer locks up. (Ref. 15471)
- If the number of parent sheets required for a blank stock job is less than the first quantity break for the blank stock price, the price is now calculated (it is no longer zero). (Ref. 14522)
- In some cases, the system would hang after you made changes to the Paper Calculator settings. This was fixed. (Ref. 15532)

## POS

- If you create a QuickEst job in the Cash Register window and apply a discount charge, the total now reflects the discount. (Ref. 15413)
  - The system now prevents you from picking up the same invoice more than once. (This was resulting in incorrect information during closeouts.) (Ref. 15562)
  - When you click **Post** in the Cash Register window, the system now ensures account details are loaded before posting the transaction. (This was causing data corruption on the register tape and incorrect account balances.) (Ref. 15572)
-

## Mobile Views

- Except for very long e-mail addresses, the e-mail address for a contact (in the invoice details) is now displayed next to the **E-mail** label instead of on the next line. (Ref. 15232)

## Accounting

- You can now select the walk-in account in the Post Payments window without an error occurring. (Ref. 15436)
- When you enter a partial payment in the **Pay** column in the Post Payments window and press the Tab key, the partial payment is now retained. (Ref. 3869)
- When a tax table is assigned to an account, this tax table (instead of the default tax table) is now used for finance charges. (Ref. 15535)
- Statements with a large amount of data no longer time out when being run from a client computer. (Ref. 14555)
- The Account Aging report is now generated more quickly for large amounts of data. (Ref. 15500)
- The Peachtree CSV accounting links file is now exported correctly so data can be imported into Peachtree. (Ref. 15467)

## Campaigns

- If a contact has campaigns associated with him/her, and you change the default contact for the account, the campaigns associated with the contact are no longer removed. (Ref. 15497)

## Reports

### Account History

- If you select **First Open**, you now see open (unpaid) items starting with the first open item (instead of seeing all items). (Ref. 13732)
- If you specify a prefix or suffix for invoices in the Accounting Order Number Format preferences (or allow a prefix or suffix to be added to an invoice number), the prefix or suffix is now displayed before or after invoice numbers in account history. (Ref. 15371)

### Customer List

- The **Sort by** field no longer includes duplicate selections. (Ref. 14537, 15388)
- For the walk-in account, the **Invoice** column in the Customer List report now shows either the last invoice creation date or the last invoice pickup date (whichever was the latest). (Ref. 15707)

### Account Ranking

- For the walk-in account, the account ranking now correctly reflects invoice totals and merchandise charges. (Ref. 15706)

### Sales

- When you select multiple periods for a daily or monthly sales summary report, the report now includes the correct data. (Ref. 13185)

### Work in Progress

- The sort direction (ascending or descending) is now retained in the Work in Progress window. (Ref. 13284)
-

## Custom

- The **EFI\_Voided Invoice Report** no longer includes invoices that were permanently deleted (cancelled twice). (Ref. 15563)
- When a report has enough search rules to require scrolling, the scrolling is now handled correctly. (Ref. 15426)

## Administration

### Backups

- In the Backup Manager preferences, you can now specify a shared network folder for backups. This requires specifying a user name and password (and optionally a domain). For information, see the section on “Backup Manager preferences” in the *PrintSmith Vision Setup and User Guide*. (Ref. 15519)

### Table Editor

- The Phone Tags table is now locked so you cannot add or delete entries in the table. (Ref. 15211)

### Security

- If a security access group does not give access to Preferences, but does give access to Document Preferences, users in the group no longer get an “insufficient access level” error when trying to open the document preferences. (Ref. 15090)

## Tracker

- Sometimes an error occurred when you stopped a job and selected the next location. This was fixed. (Ref. 15557)
- Clock in/out now works correctly. Previously, sometimes after employees clocked out they would find themselves still clocked in. Now, whenever an employee is selected in the Clock In/Out window, the system checks for corrupt time card data and repairs it if necessary. (Ref. 15581, 15627)
- Pay period numbers are now correctly retained. (Ref. 15665)
- When previewing employee time reports, **Print Options** are now available so you can select **Print Screen**, **Shrink to Fit**, or **Custom** (just as for Work in Progress or Customer List reports). (Ref. 12684)

## Scheduler

- When you open the Schedule Board, it now automatically displays the current week not some earlier week. (Ref. 14844)
- Sometimes an error occurred when you tried to release all tags and invoices. This was fixed. (Ref. 15399)

## Digital StoreFront Integration

- The **Products** tab in the Web Administration window now includes a **Save** button to make it more obvious how to save products when Digital StoreFront is integrated with PrintSmith Vision. (Ref. 14035)
-