

efi PrintSmith Vision™



Release Notes

PrintSmith™ Vision
Version 3.2
December / 2015

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EFI PrintSmith Vision | *Release Notes*

December 2015 PrintSmith Vision 3.2

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About this Document

This document describes the enhancements and corrections that were made in PrintSmith™ Vision 3.2.

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

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 systems for PrintSmith Vision servers, but Mac OS X 10.11 is now supported.
Windows 7 and Windows Server 2008 are supported *only for existing PrintSmith Vision installations*, not new installations.

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 PrintSmith Vision to version 3.2, you must be at version **3.0**. You cannot update directly from an earlier version of 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 <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

Integration with Digital StoreFront sites using SSL (HTTPS)

When a Digital StoreFront site uses an SSL connection (HTTPS), communication with PrintSmith Vision is not occurring. This will be fixed in an upcoming patch release of PrintSmith Vision.

Overriding/uploading reports

On some browsers an error occurs if you try to override a report from Report Manager or upload your own version of a report (for example, a customized statement, estimate, or delivery ticket).

Workaround: Make sure the report you are trying to upload is *not* in one of the PrintSmith Vision report repository folders. Move the report to another folder (or the desktop) and then try overriding or uploading.

Internet Explorer 10 or 11 and closeout and sales reports

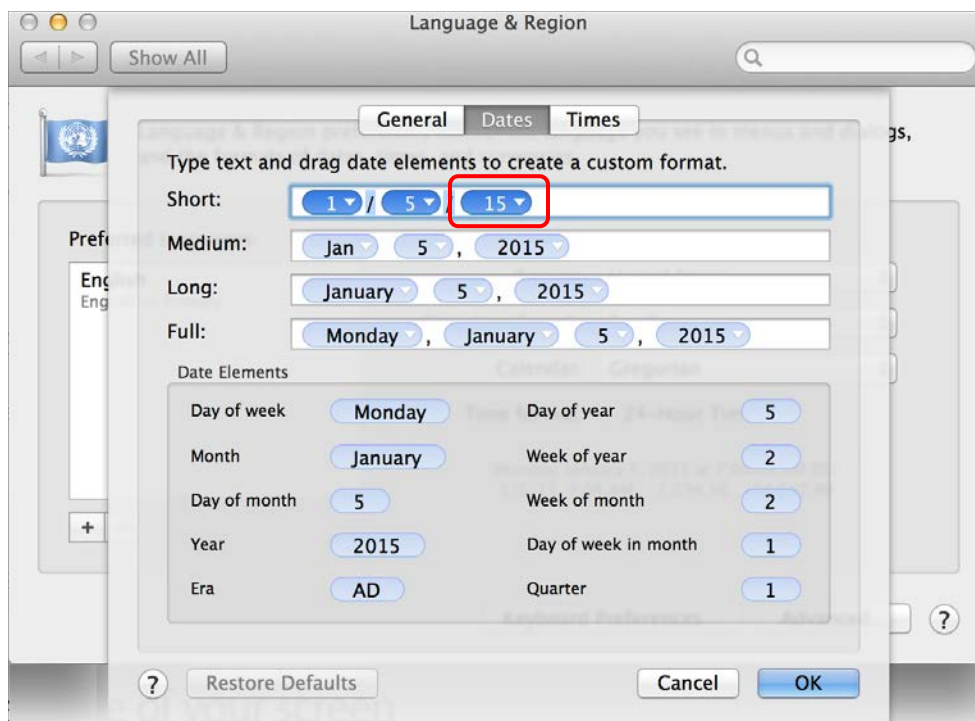
If you use Internet Explorer 10 or 11 as your browser, the following reports will not be generated and printed:

- All reports during a closeout
- Daily sales reports (**Reports > Daily Sales**)
- Monthly sales reports (**Reports > Monthly Sales**)

Please use a different supported browser for performing closeouts and for printing sales reports.

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 10).

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 (existing installations only, not new installations) Windows 8 Windows 10 (<i>Be sure to read “Windows 10 and existing PrintSmith Vision installations” on page 9.</i>) Windows Server 2008 R2 Standard (existing installations only, not new installations) 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 Server 2008 and Windows 7 are supported *only* for existing installations, not new installations of PrintSmith Vision.

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 update your server to Windows 10, be sure to follow the instructions below for 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 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*.

Macintosh

<i>Operating system:</i>	OS X 10.9, 10.9 Server, 10.10, 10.10 Server, 10.11, or 10.11 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

OS X and new PrintSmith Vision installations

Macs running OS X 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.

Existing PrintSmith installations and upgrades to OS X 10.11

If you currently have a pre-3.2 version of PrintSmith Vision installed on a Mac, and want to upgrade your Mac to **OS X 10.11** (El Capitan), you must update PrintSmith Vision to 3.2 *before* you upgrade the operating system.

After you upgrade the operating system, do the following:

- When Apple upgrades the operating system, it removes Java, which is required to uninstall PrintSmith Vision and to install future versions of PrintSmith Vision.
 - Download and re-install Java (version 7).
- When Apple upgrades the operating system, it removes your printer settings both in the operating system and PrintSmith Vision.
 - a. On the Mac, open **System Preferences > Sharing**, make sure **Printer Sharing** is selected for the printer, and make sure **Everyone Can Print** is selected under **Users**.
 - b. In PrintSmith Vision, select **Admin > Preferences > POS > Cash Drawer** and select your printer in the **Printer** field.

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, 8, or 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” below.

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 are 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 guide *PrintSmith Vision - Configuring Receipt Printers*.

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 or higher 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. 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 3.2 includes the following new features and enhancements.

Mobile Views

Several enhancements were made to the mobile views in PrintSmith Vision 3.2.

Customer logs

When viewing the Dashboard, you can now tap **Customer Follow-ups** to open the Customer Log page and see all customer issues that you logged that need follow-up today, this week, or next week.



You can tap an entry to review or edit the details.

[←](#) Customer Log

[Show Invoice Info.](#)

#26 Anna's Designs

Attn: Josh Fisher	Mobile:
Phone: 111-111-1111	Other:
Fax:	E-mail: josh@company.com

Type

CALL ▼


Comments

Called about paper selection

Follow up **Completed**

Follow-up required ON

Follow-up date

11/10/2015 

Follow-up by


admin ▼

Follow up Comments


Find out about final paper selection

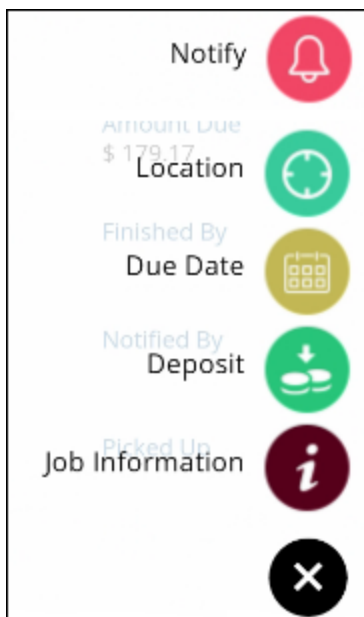
Cancel **Save**

You can also indicate that an issue was resolved (completed).

Tip You can also log interactions with a customer while viewing invoice details (except in account history). Just tap  and then tap **Notify**.

More options for managing invoices

When viewing invoice details, more options are now available if you tap .



Note When viewing invoice details in account history, only **Job Information** is an available choice.

- Tap **Notify** to log your interactions with the customer, indicate an issue needs follow-up, or indicate an issue was completed (resolved). You complete the Customer Log page as shown earlier for Dashboard customer follow-ups.
- Tap **Location** to change the job location or hold state or to indicate that the order is complete and the invoice is ready for pickup.

< Document Location

Jobs

1 Rush Color Copies ▼

Document Location

▼

Job Location

▼

Comments

Hold State

▼

Ready for pickup/delivery OFF

Cancel

Save

- Tap **Due Date** to change the wanted by date.

Due Date

#26: Anna's Designs
Invoice# 1229 - Multiple copies

Wanted Date

11/12/2015 12:00 AM

Cancel Save

- Tap **Deposit** to record a deposit for the invoice.

Important Integrated credit card processing (with USA ePay) is not currently supported for credit card deposits made through the PrintSmith Vision mobile views.

Deposits on Invoices

#26: Anna's Designs
Invoice# 1229 - Multiple copies

Deposit 1

Cash Check Credit Card

Ref # Amount

25.00

Void

Deposit 2

Cash Check Credit Card

Ref # Amount

0.00

Void

Deposit 3

- Tap **Job Information** for job details (this information is the same as in earlier releases).

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

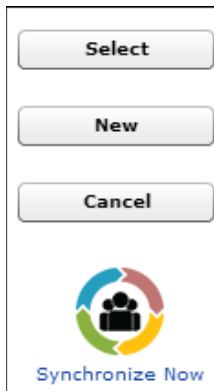
Enhancements to SugarCRM Integration

As of version 3.1, PrintSmith Vision is integrated with SugarCRM® Professional. In PrintSmith Vision 3.2, the following enhancements were made to the integration.

Additional synchronization option

If you create an account or contact in Sugar, and immediately want the account or contact to be available in PrintSmith (without waiting for the 10-minute synchronization cycle that occurs automatically), you can now do so from PrintSmith Vision. This is useful, for example, if you create an account in Sugar and want to create an estimate for the account right away.

The Account Picker and Contact Picker windows include a new **Synchronize Now** button. When you click this button, an account or contact created in Sugar is immediately available in PrintSmith Vision.



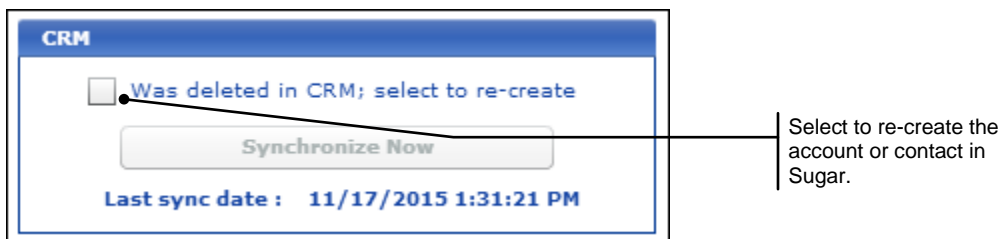
So, for example, if you create an account in Sugar, click **Create Estimate** in the PrintSmith Vision QuickAccess panel, and click **Synchronize Now** in the Account Picker window, as soon as the synchronization is confirmed, you can select the account for the estimate.

Ability to restore some accounts and contacts that were deleted in Sugar

In PrintSmith Vision, you cannot delete an account in some situations, for example, if the account has an open balance. Likewise, you cannot delete some contacts, for example, the default contact for an account. Sugar has no such restrictions, however.

Previously, if you deleted an account or contact in Sugar that cannot be deleted in PrintSmith, the account or contact still existed in PrintSmith, and the **CRM** pane (on the **Settings** tab in the Customer window or **Marketing** tab in the Contact window) would indicate that the account or contact was deleted in the CRM system. As of PrintSmith Vision 3.2, you can now re-create the account or contact in Sugar using the information about it in PrintSmith Vision. This is useful if you deleted the account or contact by accident in Sugar.

To re-create the account or contact in Sugar, in PrintSmith you select the **Was deleted in CRM; select to re-create** check box and click **Save**.



When data is next synchronized, the account or contact is re-created in Sugar using the information about the account or contact that is in PrintSmith Vision.

Note If you entered additional information in Sugar about the account or contact (for example, notes or calls), that information is *not* restored.

Synchronization logs

The synchronization between PrintSmith Vision and Sugar is now logged in PrintSmith. The logs confirm successful synchronization as well as identify any failures.

To view the logs, select **Admin > System Monitor** and click **CRM Sync Status**.

You can then check on account, contact, and/or user synchronization by status (success, failure, or warning).

The screenshot shows a window titled "CRM Sync Status" with a table of logs. The table has four columns: Sync Time, Entity Type, Sync Status, and Sync Message. The logs show various synchronization events for users, accounts, and contacts, all with a "Success" status.

Sync Time	Entity Type	Sync Status	Sync Message
11/12/2015 05:11 AM	User	Success	Created User - Jackson & Sparrow's @teller
11/13/2015 11:02 AM	Account	Success	Created Vision Account - Anna Company A
11/13/2015 11:03 AM	Account	Success	Updated CRM Account - Anna Company A
11/13/2015 11:03 AM	Contact	Success	Created CRM Contact - Anna Company A
11/13/2015 11:11 AM	Account	Success	Created Vision Account - Anna Company B
11/13/2015 11:11 AM	Account	Success	Updated CRM Account - Anna Company B
11/13/2015 11:11 AM	Contact	Success	Created CRM Contact - Anna Company B
11/13/2015 11:17 AM	Contact	Success	Created Vision Contact - Suzy Simmons
11/13/2015 11:21 AM	Contact	Success	Updated Vision Contact - Anna Contact A
11/13/2015 11:21 AM	Contact	Success	Updated Vision Contact - Anna Contact B
11/13/2015 11:22 AM	Contact	Success	Created Vision Contact - Dana Fergus
11/13/2015 11:29 AM	Contact	Success	Deleted Vision Contact - Dana Fergus
11/13/2015 00:31 PM	Account	Success	Updated CRM Account - Anna Company B
11/17/2015 00:46 PM	Account	Success	Deleted Vision Account - Anna Company B
11/17/2015 00:46 PM	Contact	Success	Deleted CRM Contact - Anna Contact B

For more information about the integration between PrintSmith Vision and Sugar, see the *PrintSmith Vision – SugarCRM Integration Guide*.

Simplified Procedure for Customizing Delivery Tickets

Report Manager is no longer required or used for customizing delivery tickets (for example, to add a logo or make minor formatting changes). In addition, you can now have more than one version of a customized delivery ticket.

The process of customizing delivery tickets is very similar to the way you customize invoices and estimates.

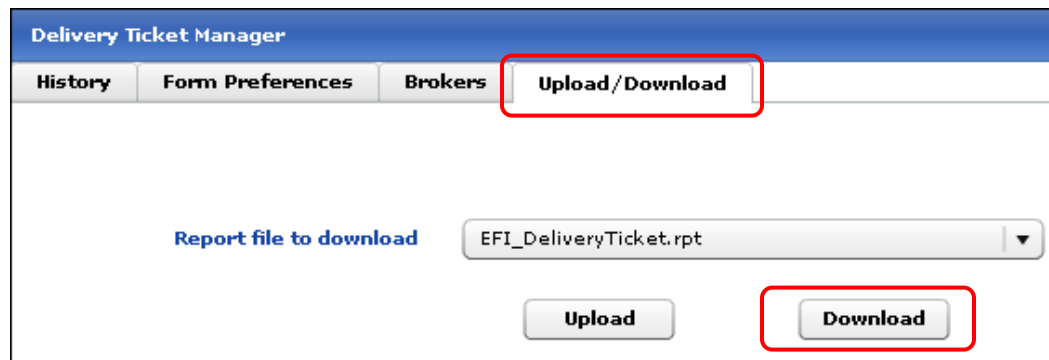
In PrintSmith Vision, the information that makes up printed delivery tickets comes from two sources: the delivery ticket form (as defined in the Delivery Ticket Layout window) and a report file (.rpt). The delivery ticket form controls what the ticket includes while the report controls the layout and appearance of the ticket as well as some of its contents (such as a logo). To edit the report, you must use i-net Designer. You then associate the report with a delivery ticket form in the Delivery Ticket Layout window.

The EFI-supplied delivery ticket is named **EFI_DeliveryTicket.rpt**, and is your starting point for customizing the delivery ticket.

Note A new repository on the PrintSmith Vision server is now used for delivery tickets:
 (Windows) **C:\Program Files (x86)\EFI\PrintSmith\PrintSmith Reports\Crystalclear Reports 12.1\delivery TicketRepository**
 (Macintosh) **Applications/EFI/PrintSmith/PrintSmith Reports/Crystalclear Reports 12.1/deliveryTicketRepository**

The procedure for customizing delivery tickets is now as follows:

1. In Delivery Ticket Manager, click the new **Upload/Download** tab and then click **Download** to download EFI_DeliveryTicket.rpt to your Downloads folder.



2. Edit the report with i-net Designer:
 - a. 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_.)
 - b. Add your logo and make any other minor formatting changes (for example, change the font). Then save the report.
3. Upload your customized report:
 - a. In PrintSmith Vision, go to the **Upload/Download** tab in the Delivery Ticket Manager window.
 - b. Click **Upload**, and select your customized report file. (Its name cannot begin with EFI_.)

4. Associate your report with a delivery ticket form:
 - a. In the Delivery Ticket Manager window, click the **Form Preferences** tab.
 - b. Select the form you want to associate with the report and click **Change**.
 - c. In the Delivery Ticket Layout window, select your delivery ticket report in the **Associated Report** field.
 - d. Change other settings as necessary (to control what is included on the delivery ticket) and click **OK**.

The screenshot shows the 'Delivery Ticket Layout' window. At the top, the title is 'Detail Form'. Below this, there are two columns of checkboxes for various fields to be shown or hidden on the delivery ticket. The 'Associated Report' field at the bottom is highlighted with a red box and contains the value 'AT_DeliveryTicket.rpt'.

Field	Checked
Show From Address	Yes
Show To Address	Yes
Show Attn	Yes
Show Ship Via	Yes
Show Delivery Date	Yes
Show Customer PO	No
Show Order Number	No
Show Part Number	No
Show Tracking Number	No
Hide Weight	No
Show Reference	No
Show Description	Yes
Show Comment	Yes
Show Signature Line	No
Show Barcodes	No
Show Delivery Number	Yes
Show Driver	No
Show Carton Count	No

Associated Report: AT_DeliveryTicket.rpt

The next time you print delivery tickets using this form, they will reflect the changes you made. For more information about customizing delivery tickets, see the *PrintSmith Vision – Setup and User Guide*.

Ability to Make Certain Fields Required

The new Mandatory Fields preferences let you make certain account and contact-related fields required. (By default none of the fields are required.) In addition, for consistency and convenience, the setting for requiring a product for a job was moved from the Estimating Behavior preferences to the Mandatory Fields preferences.

When a field is mandatory, users will not be able to complete a particular task without providing the required information.

Mandatory Fields		
Mandatory	Area	Field Name
<input checked="" type="checkbox"/>	Account	Name
<input type="checkbox"/>		Address Street
<input type="checkbox"/>		Address City
<input type="checkbox"/>		Address State
<input type="checkbox"/>		Address Postal Code
<input type="checkbox"/>		Address Country
<input type="checkbox"/>		Company Web Page
<input type="checkbox"/>		Business Type
<input type="checkbox"/>		Number of Employees
<input type="checkbox"/>		Contact
<input type="checkbox"/>	Contact Last Name	
<input type="checkbox"/>	Contact Job Title	
<input type="checkbox"/>	Contact Phone	
<input type="checkbox"/>	Contact Email	
<input type="checkbox"/>	Contact Lead Source	
<input type="checkbox"/>	Contact Shipping Street	
<input type="checkbox"/>	Contact Shipping City	
<input type="checkbox"/>	Contact Shipping State	
<input type="checkbox"/>	Contact Shipping Postal Code	
<input type="checkbox"/>	Contact Shipping Country	
<input type="checkbox"/>	Job	Product Type

For example, if the **Business Type** field is required for an account, you cannot save the account until you specify a **Business Type**. Required fields are outlined in red.

The screenshot shows the 'Account Info' window with tabs for 'Address', 'Credit Control', 'Settings', and 'Sales In'. Under the 'Company' section, there are three fields: 'Number of Employees' (text input with value 0), 'Annual Revenue' (text input with value 0.00), and 'Business Type' (dropdown menu). The 'Business Type' dropdown is outlined in red. A callout box points to this field with the text: "Red outline indicates field is required."

Similarly, if you try to create an estimate or invoice for an account – including the walk-in account – and required account/contact information is missing, you will need to provide it in the Account Info window before you can continue.

Note If you make a field required, any *existing* records in PrintSmith Vision are not affected by the requirement until you edit a record and try to save it – you will then need to provide the required information.

Enhancements to Fiery Integration

After a job is completed on the Fiery, the following information is now updated in PrintSmith Vision.

- For inventoried stock, the available stock quantity is adjusted based on the stock that was consumed for the job on the Fiery.

Stock Definitions...

Group: Envelopes | Class: 24 | Metric: | Envelope: | Sheet Stock: | Roll Stock: | Large Format: | Rigid Substrate:

Name: Coin Envelopes White | Finish: | Weight: 24,0000 | Coated: | Last Updated: 12/2/2015 11:39 AM | Last Price Change: 8/21/2001 12:00 AM

Color: White | Generic Color: White

Specification and Pricing | Pricing Options | Inventory | **Fiery Paper Catalog**

Inventory Settings

Stock is Standard Inventory Item

Stock On Hand: -40 | On Order: 0 | Target Level: 0 | Reorder Point: 0 | Min. Order Qty.: 0 | Even increments, like ream size

Committed: 0 | Available: -40

Stock Expires: | Bin Location: | Shell Item | Assign Customer Account...

Inventory History

User	Date	How Changed	Quantity	Reference
	12/2/2015 11:46 AM	Stock consumed - step comp	40	Invoice: 189
admin	12/2/2015 11:45 AM	Stock Committed	40	Invoice: 189

- If you use Tracker, the Tracker Status window shows the estimated and actual times spent on the job.

Tracker Status

Release to production

Total estimated time: 0 Hrs 03:33 | Current status: | Total actual time: 0 Hrs 01:07

Status	Item	Description	Location	Facility	Employee	Estimated	Actual	Date Completed	Costing
<input checked="" type="checkbox"/>	189/1/-	B&W	Running - Digi...			0 Hrs 01:46	34 Second(s)	12/2/2015 11...	0.08
<input checked="" type="checkbox"/>	189/2/-	B&W	Running - Digi...			0 Hrs 01:46	33 Second(s)	12/2/2015 1:...	2.24

Refresh

If you double-click an item in the Tracker Status window, the Tracker Details window shows the estimated/ actual setup and run times and the number of impressions.

Tracker Details

Item: 189/2/-

Account: #226 A. Cloutier

Description: B&W

Status: Completed

Facility:

Station:

Location: Running - Digital

Employee:

Completed:

Exception code:

	Estimated	Actuals
Total time:	0 Hrs 01:46	33 Second(s)
Setup:	0:00	0:00
Run time:	0 Hrs 01:46	33 Second(s)
Washup:	0:00	0:00
Ordered:	40	40
Impressions:	80	80
Spoilage:	0	0
Stock Cost:	1.14	
Labour Cost:	0.00	





- If you use Tracker, the costing information is updated for the invoice.

Invoice: 189 Costing

Customer: #226 A. Cloutier Invoice #189

	Description	Estimated	Actual	Difference	Price	Margin
1	40 B&W	4.37	0.08	-4.29 -5363%	13.55	13.47 99%
2	40 B&W	4.37	2.24	-2.13 -95%	13.55	11.31 83%

Special Instructions

	Cost entered	Actual	2.32
	Historical cost	Price	27.10
	Data Collections	Margin	24.78
	Priced below cost	Est. Profit	91%

Special Notes

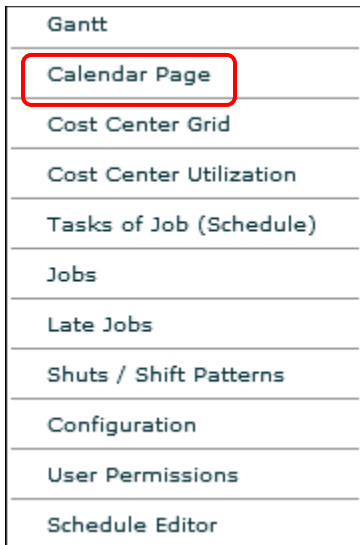
- If you track stock inventory in PrintSmith, for accurate results do *not* configure Command WorkStation to close jobs automatically. When a job is closed automatically on the Fiery, the stock quantity is sent back to PrintSmith right away, and does *not* include the actual sheet count that the operator may enter

after the job is done. For the actual sheet count to be sent back to PrintSmith, make sure Command WorkStation is configured for manual closing of jobs. This gives the operator the opportunity to enter an actual sheet count (if it differs from the original sheet count for the job) before the information is sent to PrintSmith. Stock inventory in PrintSmith is then adjusted correctly.

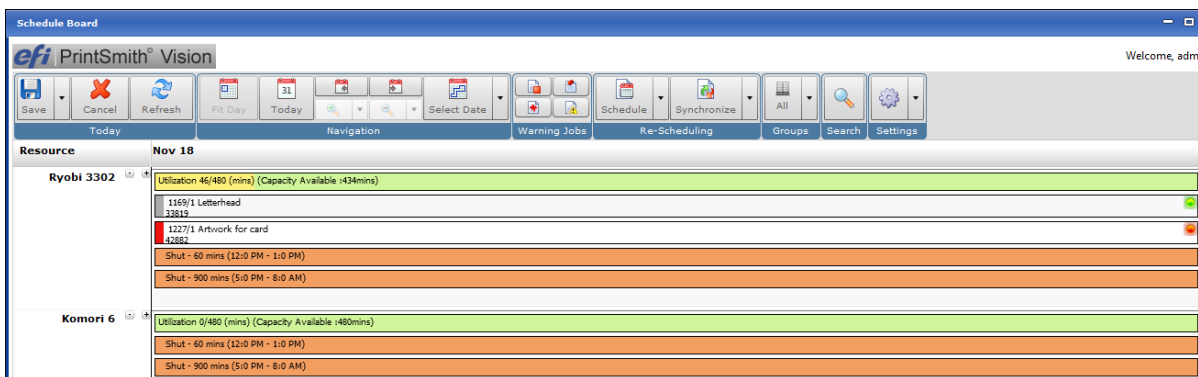
- Currently the sheet count that is sent from PrintSmith Vision to the Fiery is based on the pages in the PDF content file and the ordered quantity. It does not account for any waste or “in sets of” specified for the job.

Scheduler – New Calendar Page

A new Calendar page is available for seeing how cost centers are being used during a given time. Click **Calendar Page** on the Scheduler menu.



Initially, the page shows the current day, but you can click the down arrow next to **Select Date** to change this to some number of hours, days, or weeks.



For each cost center you can see its capacity and utilization, as well as the tasks (if any) scheduled during a particular period.

Green and red icons to the right of a task indicate whether it is ready to start or not. Hover over an icon to display additional information on the task in a popup window.

The screenshot shows the utilization bar for 'Ryobi 3302'. The bar is green, indicating it is ready to start. Below the bar, there are two tasks: '1169/1 Letterhead 33819' with a green icon and '1227/1 Artwork for card 42882' with a red icon. Below the tasks, there are two 'Shut' bars: 'Shut - 60 mins (12:0 PM - 1:0 PM)' and 'Shut - 900 mins (5:0 PM - 8:0 PM)'. A callout box points to the icons with the text: 'Hover over an icon to view additional task details.'

If you hover over the utilization bar, you can see how much time is available for the day and how much is being used.

The screenshot shows the utilization bar for 'Cutter1'. The bar is green, indicating it is ready to start. Below the bar, there are two tasks: 'S11427' and 'S11428'. A popup window is open over the 'S11427' task, showing 'Utilization 34/1080 (mins) (Capacity Available :1046mins)'. The popup also shows the task details: '03/03/02015 08:01:03 AM' and '03/03/02015 12:00:00 AM'. The main bar also shows 'Utilization 0/1080 (mins) (Capacity Available :1080r)' and '11:0 PM (360 mins) Shut'.

If you double-click the utilization bar, a popup window shows you all the day's tasks scheduled for the cost center.

The screenshot shows a popup window titled 'Utilization 34/1080 (mins) (Capacity Available :1046mins)'. It lists the following tasks:

- S11427: 03/03/02015 08:01:03 AM to 03/03/02015 12:00:00 AM
- S11428: 12/07/02015 02:15:37 PM to 04/16/02015 12:00:00 AM
- S11429: 12/07/02015 02:36:37 PM to 04/25/02015 12:00:00 AM
- S11431: 12/07/02015 04:44:37 PM to 09/01/02015 12:00:00 AM
- 11:0 PM (360 mins) Shut

In addition, just as on the Gantt chart, when on the Calendar page you can control which cost centers are listed; click a task for a menu of options (for example, to change the duration of the task or open the job ticket); or click a shut to add shuts or overtime.

New Contact Fields

To help with marketing efforts, the **Marketing Tags** section on the **Marketing** tab in the Contact window includes new **Gender** and **Age Range** fields. These fields correspond to two new tables (Gender and Age Range) which you can edit with Table Editor.

Marketing Tags

Lead Source	<input type="text"/>	Lead Source	<input type="text"/>
Common In...	<input type="text"/>	Sport Interest	<input type="text"/>
Likes	<input type="text"/>	User 8	<input type="text"/>
User 4	<input type="text"/>	User 9	<input type="text"/>
Type of Work	<input type="text"/>	Mailer Type	<input type="text"/>
Gender	<input type="text"/>	Age Range	<input type="text"/>

Additional E-Mail Fields for Suppliers

You can now specify e-mail addresses for all four supplier contacts. Purchase orders are always e-mailed to the e-mail address for the main contact.

Address | Misc | Supply Type

Address

Company: Omega Best Inks
 Street: 100 Best Way
 City: Lebanon
 State: NH
 Zip: 03766
 Country: USA
 Phone: 666-666-6666
 FAX: 666-666-6667
 E-Mail: Roger.Smith@obi.com

	First	Last	Salution	Phone	E-Mail
Main Contact	Roger	Smith		666-666-6668	er.Smith@obi.com
Sales Contact	Maggie	Alexander		666-666-6669	alexander@obi
Account Contact	Luisa	Rubio		666-666-6665	a.Rubio@obi.com
Other Contact					

Corrections

The sections that follow describe the corrections that were made in PrintSmith Vision version 3.2. For your convenience they are categorized.

Installation/Updates

- When you update PrintSmith Vision, unnecessary backup files are no longer created in the PrintSmith installation folders. (Ref. 15515)

Server/Network

- If a connection cannot be made to the PrintSmith Vision server, you now get the message “Unable to establish connection to the server” instead of “Server is down” (which was misleading). (Ref. 14440)
- If the network is down and the user is idle for more than a minute, the user is no longer logged out with a warning. (Ref. 15956)

Localization

- When installing PrintSmith Vision for the first time, English (UK) is now available as a language selection.

Important Currently, after you install PrintSmith Vision, you must manually change the currency symbol in the Numbers preferences from dollar to pound.

(Ref. 15813)

- The zip code validation for the U.S. was causing problems in countries (like Australia) where the postal code is fewer than five digits. This was fixed. (Ref. 15536)
- In a number of places English Australian strings were added or corrected. (Ref. 14908, 15937)
- Some English UK strings were corrected.

Users

- An error no longer occurs when a user logs in with a user name that includes an apostrophe ('). (Ref. 15098)
- If you enable a user who was disabled after entering the wrong login credentials eight times, the user now gets eight more tries to log in. (Ref. 16010)

Charges

- When you set up a rate list (the **Use as Rate List** check box is selected), the column header now changes to **Rate** instead of remaining as **Amount**. (Ref. 2901, 7514)

Stocks

- If you select a stock twice in the Stock Picker window, the system no longer hangs. (Ref. 15957)
- If you import stocks and sheets/set for a stock is 0, sheets/set now defaults to 1 after the stock is imported. (Ref. 15927)
- When you tab through the Stock Order window (e.g., after entering a quantity received), pressing the Enter key is now equivalent to clicking **OK**. (Ref. 14299)
- When you order stock for an invoice, the cost of the ordered stock is now correct in the Stock Order window (**Reports > Stock Order**). (Ref. 15629)
- Sorting by column now works correctly in the Stock Order window (**Reports > Stock Order**). (Ref. 3378)

Accounts

- If you filter by **Master Billing** in the Contact Picker window, the contacts for the specified master account are now listed. (Ref. 3117)

List Price Schedules

- If a list price schedule is already open, clicking **Select** does not open it again in a new window. (Ref. 6704)

Estimating

Invoices and estimates

- The sort order in the Pending Documents window is now retained when orders come in from Digital StoreFront, PrintSmith Site, or Four51. (Ref. 14499)
- If you select multiple documents for pickup in the Pending Documents window, you are now prevented from picking up estimates (only invoices can be picked up). (Ref. 15794)
- If you add a shipping charge to an invoice, and select **Other Address** under **Delivery Intent** in the Account Info window, the address is now set correctly. (Ref. 4557)
- The system now prevents different users from creating invoices with the same invoice number. (Ref. 15501)
- If you convert or copy an estimate to an invoice or copy an invoice to an estimate, the default format associated with the account is now carried over to the new document. (Ref. 13441)
- If required invoice data is being loaded when you click **Save** in the Invoice window, you are now told to try saving again in a little while. (Ref. 15775)
- When you use Ctrl+Atl+S to save a document, the associated document format (preferences) no longer change. (Ref. 14554)
- The **Ready for pickup/delivery** check box in the Location window is not available when an estimate is selected in the Pending Documents window. (Ref. 15977)

Jobs

- You are now prevented from opening more than one Paper Calculator window to avoid losing changes you made to settings (e.g., run and finish sizes). (Ref. 13140, 14059)
 - In some situations a slow connection was causing Paper Calculator data not to be saved as expected. This was fixed. (Ref. 15809)
 - When you enter a cost for a special order stock, the job price is now updated automatically. (Ref. 14980)
 - In some situations if you overrode the price in the Job window, opened the Paper Calculator window and clicked **Save**, clicked the **Price** field in the Job window, and then tabbed out, the system would hang. This was fixed. (Ref. 15761)
 - If you start to type a vendor name for a job so that PrintSmith automatically completes the name (based on information in the Vendor table), the vendor is now saved as part of the job. (Ref. 15953)
 - When a printing, color, B&W, or large format job includes odd signatures, the number of copies is now calculated correctly. (Ref. 15746)
 - When you copy an invoice and update pricing, the number of passes on the back for work and turn jobs is now correct. (Ref. 15922)
 - The height of the **Back Passes** and **Ink** fields in the Job window was corrected so text is now displayed in full. (Ref. 15815)
-

- You can now select a **Run Method (Work and Turn or Work and Tumble)** for a job even when no stock is associated with the job or when a special order stock is specified. (Ref. 15936, 16055)
- A performance issue related to overriding the job price was fixed. (Ref. 15796)
- After editing certain types of jobs, pressing Escape would hang the system. This was fixed. (Ref. 15952)

POS

- You can now override the **Total** field in the Cash Register if the field includes cents (e.g., 10.23). Previously you could only override whole numbers. (Ref. 15749)

Purchase Orders

- If a Purchase Order window is open, you are no longer prevented from creating another purchase order (and opening a new Purchase Order window). (Ref. 15715)
- You can now add a line item to a purchase order without a cost associated with it. (Ref. 15346)
- An error no longer occurs if the **Line Item Description** or **Additional Description** in the Purchase Order Line Item window is longer than 255 characters. (Ref. 15931)

Mobile Views

- The search icon is now displayed correctly (within the search field) in iOS. (Ref. 15267)

Accounting

- When you pick up an invoice for a frozen account, cash is no longer selected as the payment method in the Cash Register window, nor is an amount tendered shown. (Ref. 14111)
- When the **Round tax up** check box is selected in the Numbers preferences, tax is now calculated correctly. (Ref. 15711)
- The time it takes to generate account aging and statement reports for all accounts was improved when **Always change account status** or **Never change account status** is selected. (Ref. 15820)
- If you post POS charges to the walk-in account, the balance is now updated correctly for the walk-in account (on the **Sales Info** tab). (Ref. 15712, 15713)
- You are now prevented from making a journal entry on an invoice for a prospect account. (You must first change the account to a customer account.) (Ref. 8154)
- The CSV export file that is generated for Sage Line 50 (using the **Accounting Links** option in the Sales reports) is now correct (and matches what PrintSmith Classic generated). (Ref. 15750)
- The export file that is generated for Peachtree Accounting (using the **Accounting Links** option in the Sales reports) now includes the date of export instead of the closeout date. (Ref. 15811)
- The export file that is generated for MyOB (using the Accounting Links option in the Sales reports) no longer includes an extra line. (Ref. 15751)

Reports

Customer List

- If you run a Customer List report with **Report Type** set to **Balance Summary** and **Sort by** set to **Account Status**, the **Acct#** column now shows the status groups in a logical order (new, current, inactive, past due, delinquent, and frozen). (Ref. 12672)
 - The printed Customer List report with **Report Type** set to **Sales Summary** and **Sort by** set to **Sales Rep** is now correct (and matches what PrintSmith Classic generated). (Ref. 13150)
-

Account Ranking

- If you run an Account Ranking report with **Rank accounts by** set to **Sales by Date Range**, merchandise charges are now included in the results. (Ref. 15710)
- When you run an Account Ranking report with **Rank accounts by** set to **Sales by Date Range**, the report now includes invoice shipping charges. For the walk-in account, the report also includes sales data that was imported from PrintSmith Classic. (Ref. 15939)

Report Manager

- In Report Manager, the deposit ticket report was moved from the **System** category to the **Closeout Reports** category. (Ref. 15810)
- If you enter search rules when running a custom report, the settings are now retained so you do not have to re-enter them. (Ref. 15344)

Administration

Backups

- If a backup fails for any reason, the admin (owner) is now warned when next logging into PrintSmith Vision. (Ref. 15333, 15381)

E-Mail configuration

- The "from" address for invoices and estimates is now taken from the user's definition if the correct fields are filled in. This applies to all kinds of e-mail that can be configured in PrintSmith. For EFI mail (EFI-hosted only) and SMTP mail, you must provide an e-mail address and password. For Microsoft Exchange Server mail, you must provide an e-mail address, plus the login credentials (user name and password) for accessing the e-mail account. For more information, see the *PrintSmith Vision – Setup and User Guide*. (Ref. 15807)

Table Editor

- When you open a table in Table Editor and highlight a record but make no changes, you are no longer unnecessarily prompted to save your changes. (Ref. 14307)
- You can now select multiple items in a table (e.g., several colors in the Stock Colors table) and delete them all at once. (Ref. 15477)
- When a table (e.g., Phone Tags or Account Custom Labels) is locked, the + (add) and x (delete) buttons are now grayed out because records cannot be added or deleted. (Ref. 15486)
- Some colors in the Stock Colors table were not being displayed after being entered and saved. This was fixed. (Ref. 15648)

System Monitor

- When viewing **Sessions** in the System Monitor, you can now sort the list by **User Name**. (Ref. 15478)

Tracker

- If you double-click (instead of click) an "activity" button (e.g., **Start**) in the Tracker Console, the system no longer hangs. (Ref. 15805)

Digital StoreFront Integration

- A problem that was causing Digital StoreFront sites to go down was resolved. (Ref. 15907)
 - If the connection between Digital StoreFront and PrintSmith fails, it is now automatically reset. (Ref. 15911)
-

- If a Digital StoreFront order includes a company name in the shipping address, the company name is now included in the appropriate places in PrintSmith Vision (e.g., Account Info window and delivery ticket). (Ref. 15757)
- If your Order Number Format preferences specify a suffix or prefix for invoices, the invoices created for orders coming in from Digital StoreFront now include the suffix or prefix. (Ref. 15929)
- When you create new products or duplicate products in the Web Administration window, existing products are now automatically saved (if they were not already saved). (Ref. 16005)
- A performance issue related to Digital StoreFront orders with file attachments was resolved. (Ref. 15838)
- When the URL for a file attachment was long (exceeded a certain number of characters), the Digital StoreFront order was not coming into PrintSmith. This was fixed. (Ref. 15965)
- Files attached to Digital StoreFront orders are now consistently available in PrintSmith (and listed in the Digital Assets window for jobs). (Ref. 15966)

SugarCRM Integration

- When a new business type (industry in Sugar) or lead source comes over from Sugar, the records are created correctly in the associated tables in PrintSmith Vision. (Ref. 15917)

Fiery Integration

- Once a job is finished on the Fiery and the status in PrintSmith changes to **Complete**, it now remains that way (and does not change back to **Ready**). (Ref. 15988)

PrintSmith Site Integration

- If a product includes a template for a multi-part job, the template is now correctly preserved when you duplicate the product (sub jobs are no longer removed). (Ref. 15974)
 - If you update the Ship Via table and then click **Send Shipping List** on the **Admin** tab in the Web Administration table, the information is sent to PrintSmith Site as follows: if a shipping method has an entry in the **Key (Alpha)** column in the Ship Via table, this value is sent to PrintSmith Site; if a shipping method has no entry in the **Key (Alpha)** column, the name of the shipping method (from the **Name** column in the Ship Via table) is sent. (Ref. 15464)
-