

efi PrintSmith Vision™



Release Notes

PrintSmith™ Vision
Version 3.2.1
January / 2016



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EFI PrintSmith Vision | *Release Notes*

January 2016 PrintSmith Vision 3.2.1

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About this Document

This document describes the enhancements and corrections that were made in PrintSmith™ Vision 3.2.1.

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

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 3.2.1, you must be at version **3.2**. 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

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

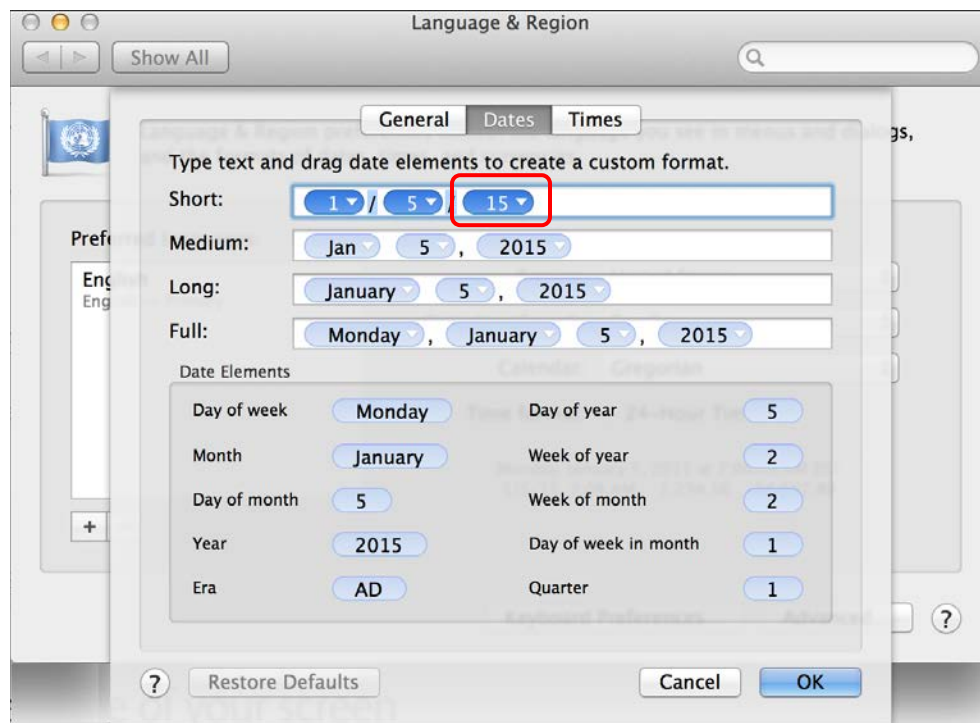
If you use Internet Explorer 10 or 11 as your browser, the following reports will not be generated and printed:

- 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 ** 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

** For Windows 10, be sure to read “Windows 10 and existing PrintSmith Vision installations” on page 9.

*** 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-3.2.1 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 3.2.1 *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 3.2.1 includes the following enhancement.

Duplicating Invoices from Mobile Views

You can now duplicate an invoice from the PrintSmith Vision mobile views. This saves time when a customer re-orders a job.

Whenever you are viewing invoice details, tap  and then tap **Duplicate**. You can then update the pricing, change the quantity, and re-calculate the invoice.

Four51 Integration

The following enhancements/changes were made to the integration with Four51:

- The **SKU** field on the **Products** tab in the Web Administration window can now be edited, but must be unique.
- The shipping address for the order is now copied to the Web Worksheet window instead of the **Special Instructions** field in the invoice.
- The Four51 order number is consistently displayed as the **Web reference number** in the bottom left corner of the Invoice window.
- Content files (digital assets) that are part of a Four51 job are now listed in the Digital Assets window where they can be previewed.
- The order/job description now includes additional information from Four51 (Ref. 16120).

The description always includes the following:

- Product ID. This is always the first part of the description, for example, **E103 – Envelopes** in the figure below.
- Product name. This is always in square brackets, for example, **[10 x 13 Envelope]** in the figure below.
- Cost center. This is always the last item in the description, for example, **Marketing** in the figure below.

Description	E-103 - Envelopes [10 x 13 Envelope]Marketing
--------------------	--

In addition, the description may include the following:

- A variant if the order was for a particular customer, for example, **CustomerName2** in the figure below. The variant always follows the product ID.
- An InteropID (SKU), for example, **PS-SKU-19** in the figure below. The SKU precedes the product name in square brackets.

Description	BC - CustomerName2 [PS-SKU-19 - Business Card W/Backer]Finance
--------------------	---

Corrections

The sections that follow describe the corrections that were made in PrintSmith Vision version 3.2.1. For your convenience they are categorized.

Auto Logouts

- If there is no connection between the client and server for more than 10 minutes (for example, the network is down, or the user closed the browser instead of logging out), the user is automatically logged out, the user session is canceled (freeing up a license), and any records locked by the user are automatically unlocked. (Ref. 16127)

Localization

- When UK is selected in the Installer, the currency symbol is now automatically set to pound (instead of dollar). (Ref. 16061)
- When the language is set to English (Australia), the word "tax" is now consistently used instead of "VAT." (Ref. 16071)

Stocks

- The sort order of the **Vendor** field in the Stock Picker and Stock Definitions window now matches the sort order saved for the Vendor table in Table Editor. (Ref. 16079)
- If you order stock while creating a job, the stock is now reflected in the Stock Order report after you save the invoice. (Ref. 16075)

Accounts

- When you search for accounts in the Account Picker window by typing characters, accounts are now listed correctly. (Ref. 15705)
- If **Use Contact Address** is selected on the **Address** tab for a contact, that address is now used consistently. (Ref. 16085)
- When you add a contact from the Customer window, the contact details are now added without an error occurring. (Ref. 16094)
- If the first name or last name field is blank in the contact CSV import file, duplicate contacts are no longer created. (Ref. 16042)
- If the account status in the customer CSV import file does not match an account status in PrintSmith, the status is set to **New** when the data is imported. If the account type does not match, it is set to **Cash/Check/Credit Card**. (Ref. 16077)

Estimating

Invoices and estimates

- The contacts in the **Contact Ship Address** field in the Account Info window are now listed alphabetically. (Ref. 14484)
 - If **Change address on ALL documents** is selected in the Estimator Behavior preferences, the contact for an invoice has **Use Contact Address** selected, and you edit the invoice or shipping address and save and re-open the invoice, the changed address (not the contact address) is now shown. (Ref. 16101)
-

- If the **Round tax up** check box is selected in the Numbers preferences and **Round to** is set to **2**, the total and amount due in the invoice now match. Likewise, journal entries are now correctly rounded. (Ref 16090)

Note *Known issue:* when **Round to** is greater than 2, rounding inaccuracies still occur when either rounding up or down.

- When printing invoices from account history, you no longer get warnings about a customer's credit balance. (Ref. 16093)
- If you specify a prefix or suffix in the Order Number Format preferences, the prefix or suffix is now included when you print an invoice from account history. (Ref. 16080)
- If you update actual costs in the Costing window, switch back to the Invoice window, and close the invoice, you are now prompted to save your changes (to avoid losing your costing changes). (Ref. 14238)

Jobs

- The second address line is now included on carton labels. (Ref. 16091)

POS

- A series of steps taken in the Account Info window could prevent an invoice from being picked up. This was fixed. (Ref. 16059)

Purchase Orders

- If you specify a prefix or suffix in the PO Settings preferences, it is now included as part of the purchase order number. (Ref. 16072)
- A supplier e-mail address can now be up to 255 characters long. (Ref. 16144)

Mobile Views

- If all licenses are in use when you try to log into the PrintSmith Vision mobile views, you now get a message explaining the problem. (Ref. 16070)

Accounting

- When the walk-in account is locked, other users are no longer prevented from working with journal entries (**AR > Journal Entry**). (Ref. 16081)
- The settings of the **Always round down** and **Round tax up** Numbers preferences are now reflected in journal entries. (Ref. 16003)
- If the **Round tax up** check box is selected in the Numbers preferences, the tax is now calculated correctly when an invoice includes shipping charges. (Ref. 16009)
- The sales for the walk-in account in the Customer List report and on the **Sales Info** tab in the Customer window were not being correctly calculated. *To correct your current statistics*, open the walk-in account and click **Update Customer Statistics** on the **Sales Info** tab. Going forwards, the sales statistics will be correct. (Ref. 16124)

Reports

Account Ranking

- When you run an Account Ranking report for the walk-in account for **Sales Current Year** and for **Sales by Date Range** (for the same time period), the results are now the same. (The statistics were not being updated after a monthly closeout.) For this fix to be reflected in the Account Ranking report, open the walk-in account, click the **Sales Info** tab, and click **Update Customer Statistics**. (Ref. 16099)
-

- Performance was improved for a large database when generating an Account Ranking report by **Sales by sales category**, **Sales by date range**, or **Sales by category and date**. (Ref. 16150)

Sales

- The WIP total in the Sales Summary report and Work in Progress report is now the same. Future closeouts will have the correct numbers. (Ref. 16134)

Custom

- When you run a custom report for the first time, the default search values for date and time fields are the current date and time; for combo string fields there is no default. If you modify the search values, these new values are used the next time you run the report. (Ref. 16084)

Table Editor

- Several corrections were made to the way table properties work in Table Editor for the Sales Rep, Production Presses, Production Copiers, Ship Via, and Vendor tables. (1) If the **Table Status** in the Table Properties window is set to **Editable**, the table can be edited with Table Editor. (2) If the **Table Status** is set to **Add Edit command**, **Edit** is available in the list users see when selecting a value from the table in PrintSmith Vision. If the user clicks **Edit**, Table Editor opens, and the user can add/delete/edit records in the table. (3) If the **Table Status** is set to **Add from Input**, users can enter a new value instead of selecting one from the list (e.g., enter a new sales rep). This value, however, is saved only in the context of what the users are currently doing (e.g., specifying a sales rep for an account); it is not saved in the table available from Table Editor (e.g., Sales Rep table). (4) If the **Table Status** is set to **Add from Input and Edit**, users can either select **Edit** as described for (2) or enter a value as described for (3). (Ref. 16180)

Tracker

- If you do not have permission to edit employee settings and try to do so, that employee's user preferences are no longer removed. (Ref. 16064)

Digital StoreFront Integration

- The integration with Digital StoreFront now works when the Digital StoreFront site is using an SSL connection (HTTPS). (Ref. 16024)
- Firefox does not support copying from read-only fields. When you are integrating PrintSmith Vision with Digital StoreFront, use another browser to copy the required values from the MIS Systems page in Digital StoreFront to the Integration preferences in PrintSmith Vision. (Ref. 15646)

SugarCRM Integration

- If an account created in Sugar included decimal values in the **Annual Revenue** or **Employees** fields, the information from those fields was not being synchronized with PrintSmith Vision. This was fixed. (Ref. 16178)

Four51 Integration

- When you create products on the **Products** tab in the Web Administration window either by clicking **New** or by dragging, and then sort the products, the products are now saved. (Ref. 16131)
- The attention line in a shipping address in a Four51 order now comes into PrintSmith Vision. (Ref. 16109)

PrintSmith Site Integration

- If you sorted existing products on the **Products** tab in the Web Administration window and then added a new product and saved it, the new product was not being saved. This was fixed. (Ref. 16096)
-