Release Notes

PrintSmith™ Vision
Version 3.3
March / 2016

EFI PrintSmith Vision | *Release Notes*

March 2016 PrintSmith Vision 3.3

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About this Document

This document describes the enhancements and corrections that were made in PrintSmith™ Vision 3.3.

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 no longer supported 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 PrintSmith Vision to version 3.3, you must be at version **3.2** or **3.2.1**. 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

Mac OS X: PrintSmith server may be slow to start after update to 3.3

On some Macs, after you update PrintSmith Vision to version 3.3, the server may take a few minutes to start automatically the first time after the update.

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

Operating system:	Windows 8 Windows 10 ** Windows Server 2012 R2 Standard or Essentials***
Processor:	Intel Quad Core i7 2.3 GHz
Memory:	16 GB (more memory will improve performance)
Hard drive:	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*.

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

Operating system:	OS X 10.10, 10.10 Server, 10.11, or 10.11 Server
Processor:	Intel Quad Core i7 2.3 GHz
Memory:	16 GB (more memory will improve performance)
Hard drive:	50 GB free space

OS X and new PrintSmith Vision installations

Macs running OS X 10.10 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-3.3 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 3.3 *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:

Operating system:	Windows 7, 8, or 10 Macintosh OS X 10.8 or higher
Memory:	4 GB minimum (more memory will improve performance)
Browser:	See “Browser Requirements” below.
Monitor:	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 700ll 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 3.3 includes the following enhancements.

E-Mail Enhancements

Several enhancements were made to e-mail support in PrintSmith Vision 3.3.

Additional types of documents can be e-mailed

In addition to e-mailing estimates, invoices, and purchase orders as in earlier releases, you can now e-mail the following:

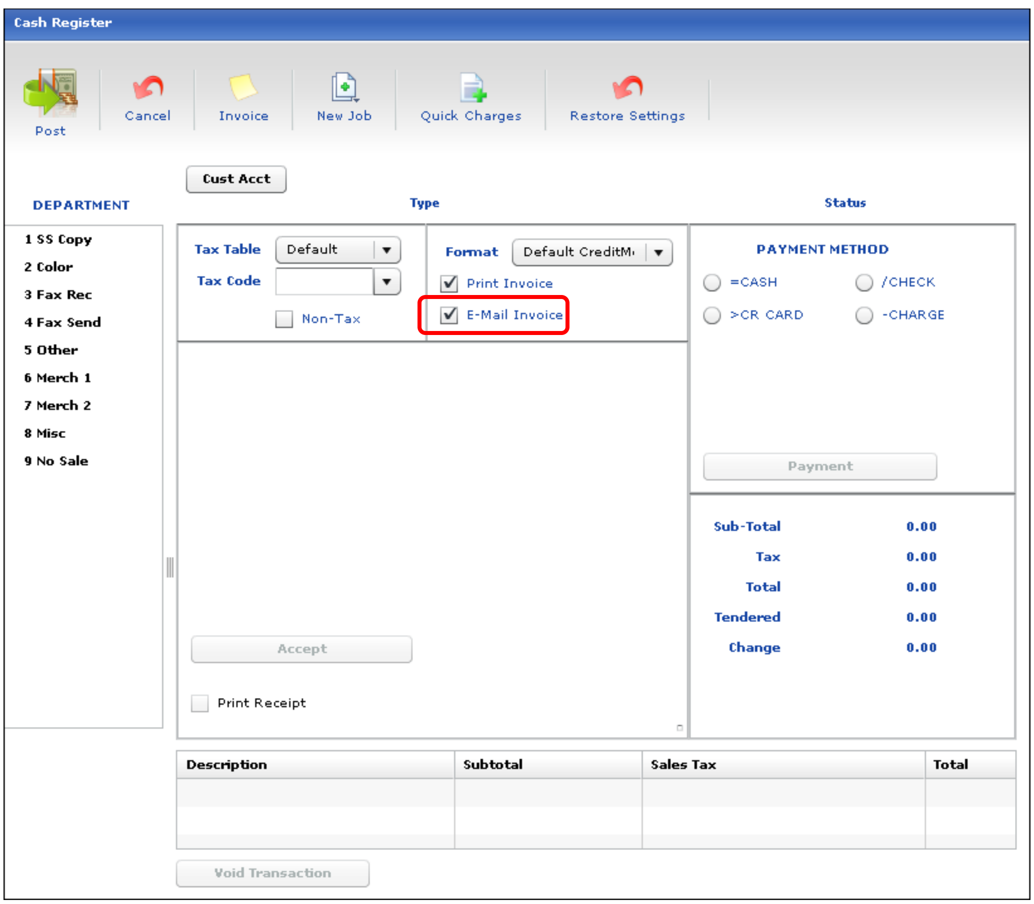
- Invoices posted in the Cash Register and Post Payments windows
- Credit memos for journal entries
- Statements

Posted invoices

When e-mail is configured in PrintSmith Vision, you can now e-mail posted invoices from both the Cash Register and Post Payments windows.

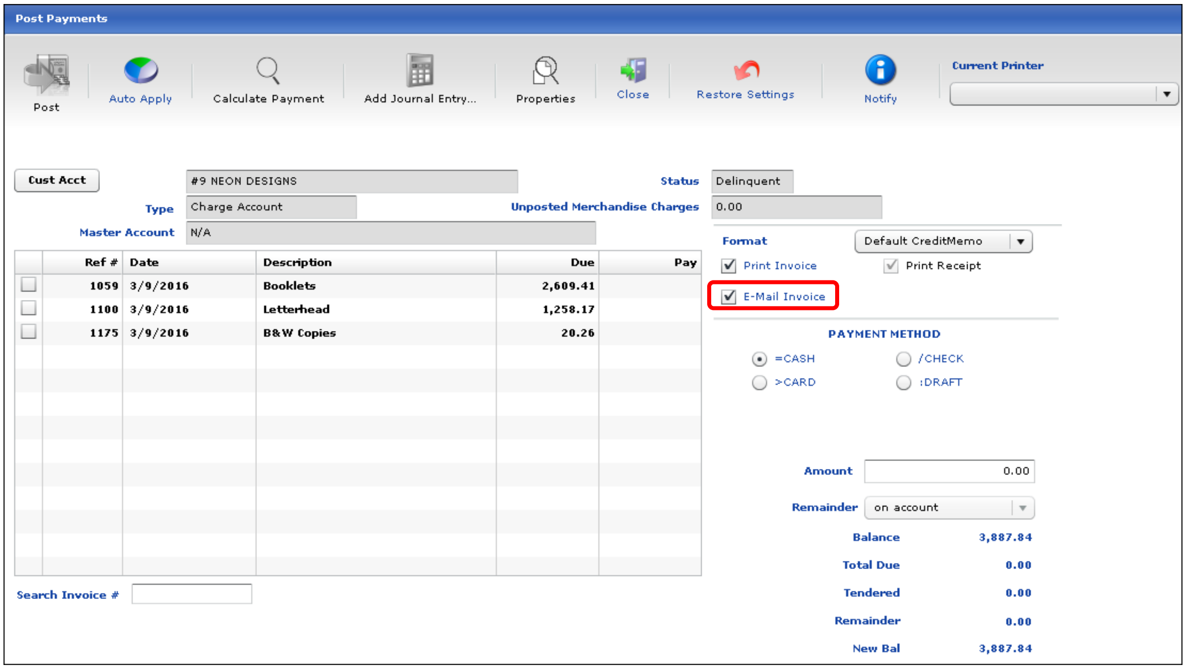
If you select the **E-Mail Invoice** check box in the Cash Register window, the invoice is automatically e-mailed to the invoice contact after you post the invoice.

For more information, see the “E-mailing invoices from the Cash Register window” section of the *PrintSmith Vision – Setup and User Guide*.



Similarly, if you select the **E-Mail Invoice** check box in the Post Payments window, the invoice is automatically e-mailed to the invoice contact after you post the invoice.

For more information, see the “E-mailing posted payments” section of the *PrintSmith Vision – Setup and User Guide*.

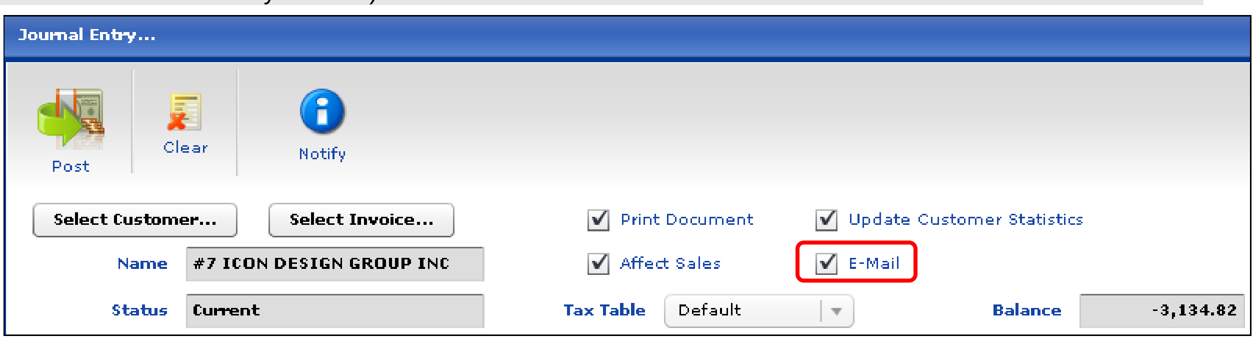


Note When you e-mail invoices from the Cash Register and Post Payments window, they are sent directly (you cannot review them before they are sent).

Credit memos

You can now e-mail a credit memo to a customer after you post a journal entry – just select the **E-Mail** check box before posting the journal entry. The credit memo is sent to the contact for the invoice (or the invoice contact for the account).

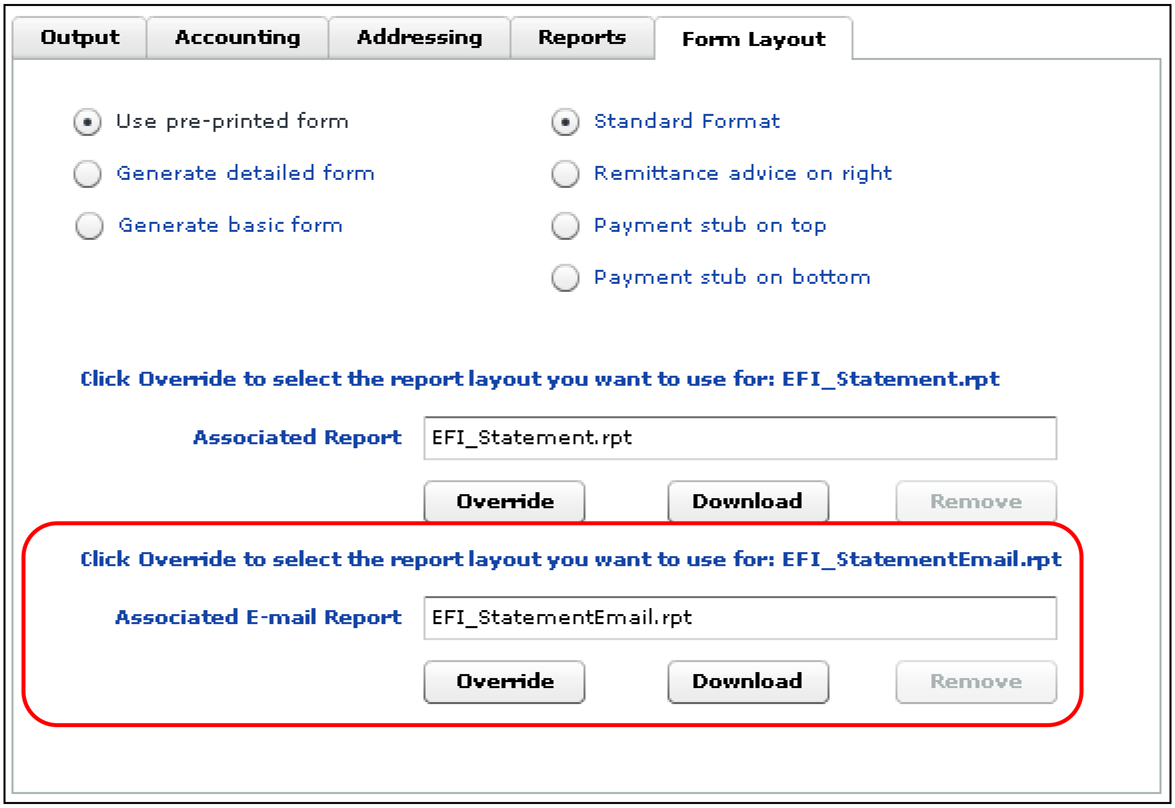
Note When you e-mail credit memos from the Journal Entry window, they are sent directly (you cannot review them before they are sent).



For more information, see the “E-mailing credit memos” section of the *PrintSmith Vision – Setup and User Guide*.

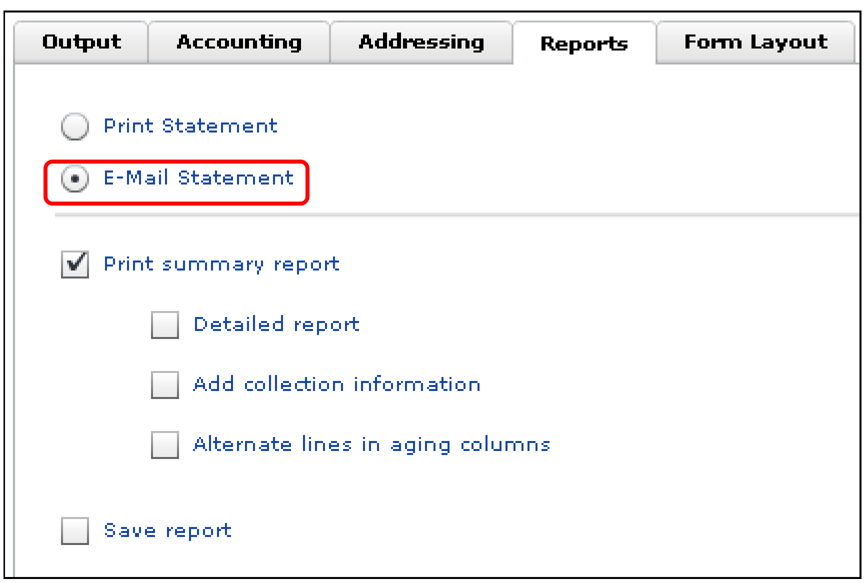
Statements

For e-mailed statements, you can customize the underlying report file. The procedure is identical to customizing the report file for printed statements, but for e-mailed statements you download and override **EFI_StatementEMail.rpt**. (For more information, see the section on “Customizing your statements” in the *PrintSmith Vision – Setup and User Guide*.)

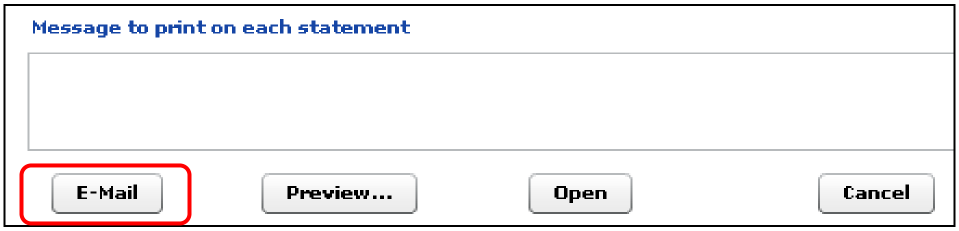


Statements are mailed either to the statement contact or invoice contact, depending whether **Use Statement address** or **Use Invoice address** is selected on the **Addressing** tab in the Generate Statements window.

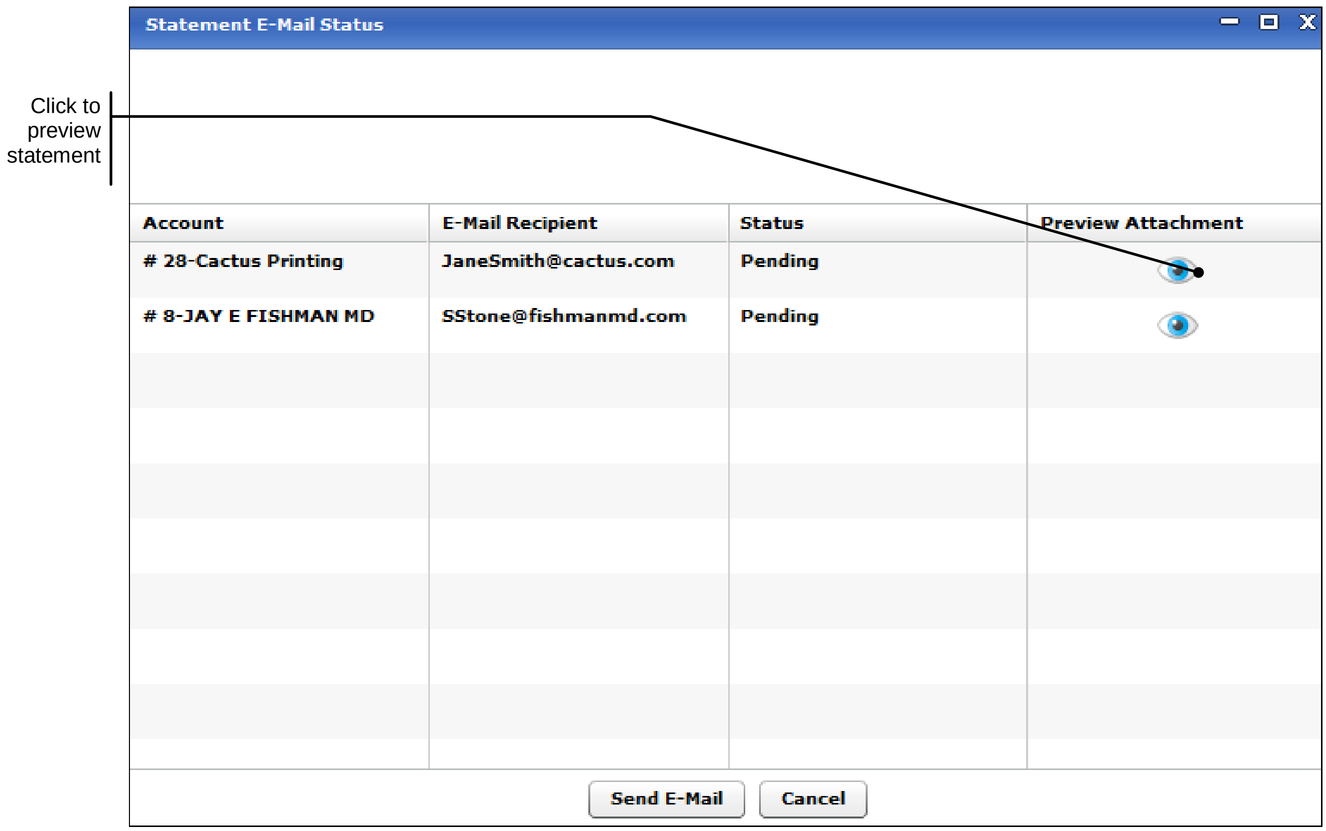
For statements to be e-mailed, you must select **E-Mail Statement** on the **Reports** tab.



When **E-Mail Statement** is selected, the **Print** button at the bottom of the Generate Statements window changes to **E-Mail**.



After you click **E-Mail** (and select accounts if necessary), the Statement E-Mail Status window opens. Here you can preview statements before clicking **Send E-Mail**.

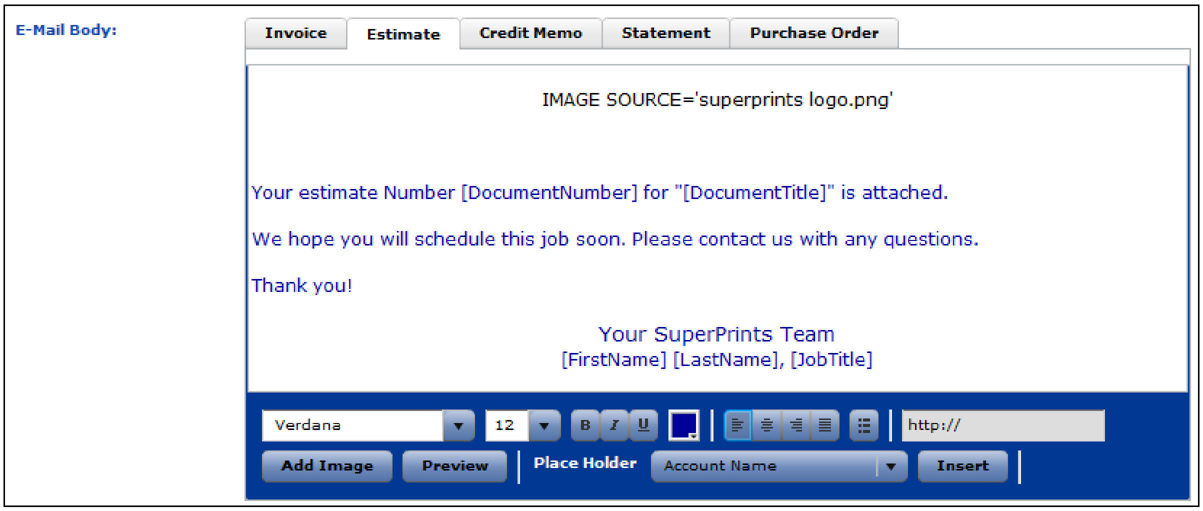


For more information, see the “E-mailing statements” section of the *PrintSmith Vision – Setup and User Guide*.

Customization of e-mail body

In previous release of PrintSmith Vision, the e-mail body you defined in the E-Mail preferences was the same for all types of documents that you e-mailed (estimates, invoices, and purchase orders) so the text of the body had to be generic. Now you can set up a different e-mail body for invoices, estimates, credit memos, statements, and purchase orders.

Note The body you define on the **Invoice** tab applies to invoices e-mailed from the Invoice, Cash Register, and Post Payments windows.

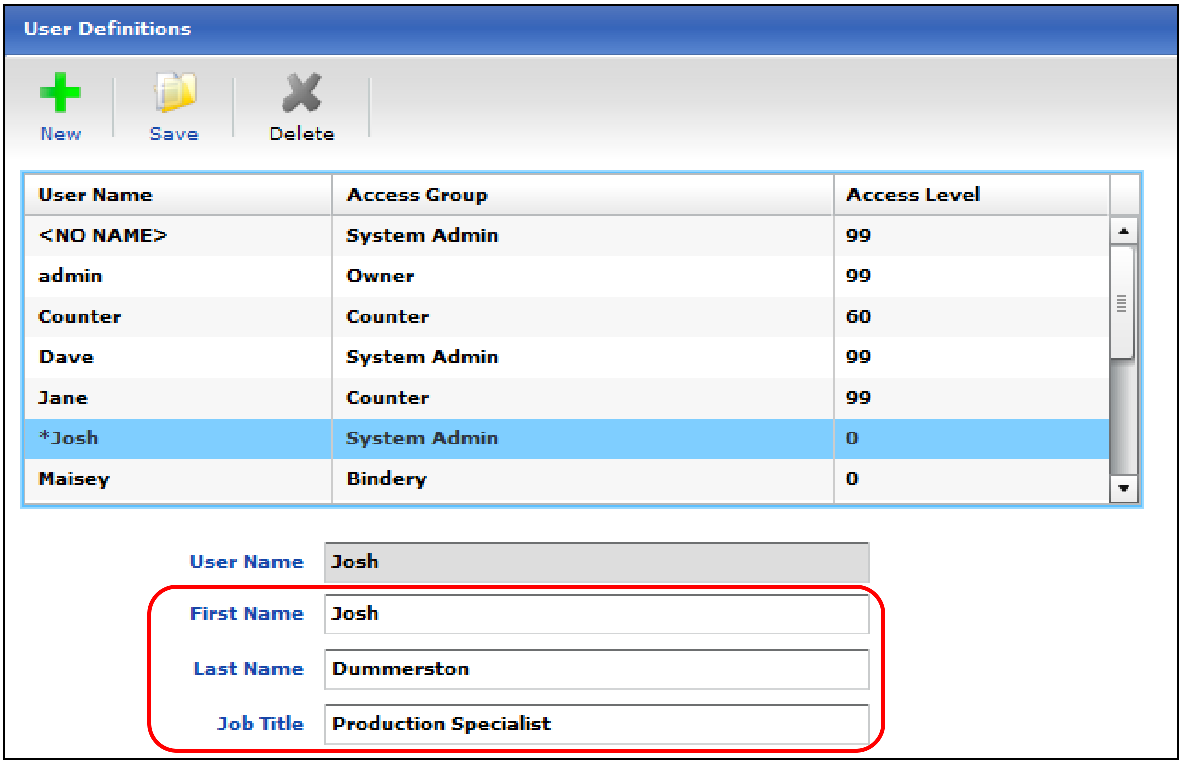


In addition, you can now insert *place holders* which are replaced with actual data when the e-mail is sent. For example, **[DocumentNumber]** is replaced with the number of an invoice or estimate; **[AccountName]** is replaced with the name of the account; **[Supplier]** is replaced with the name of the supplier for purchase orders; and so on. The available choices depend on the type of e-mail you are sending.

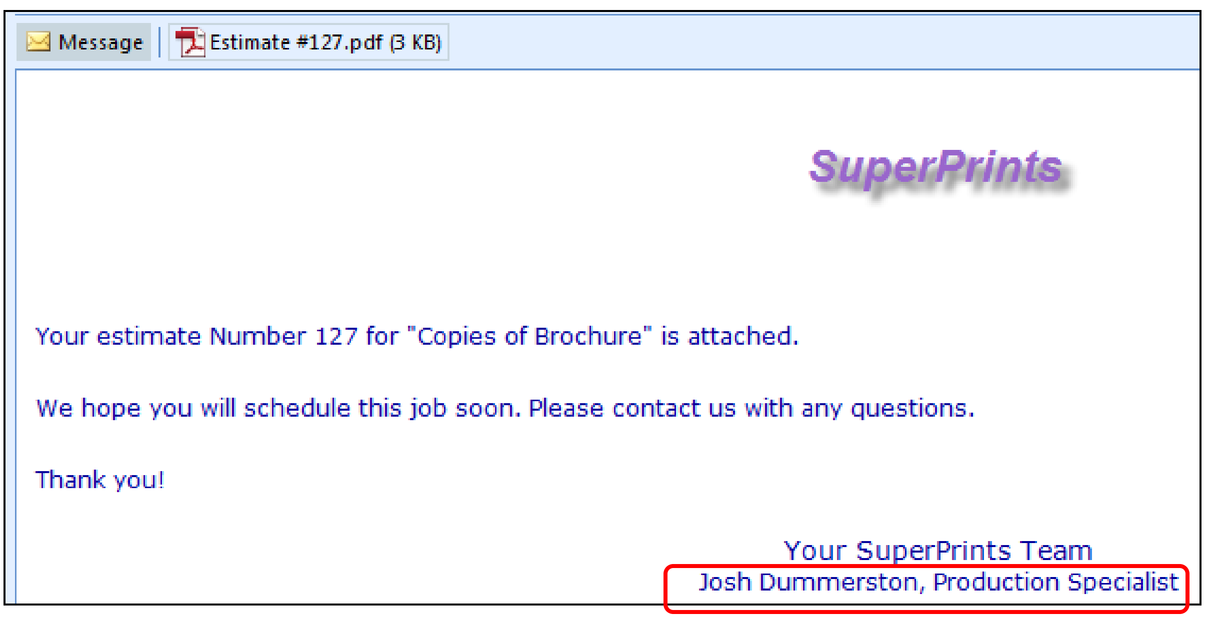
Tip When you insert a place holder, it is always added at the end of the body. Cut the place holder and paste it where you want it.

The **[FirstName]**, **[LastName]**, **[JobTitle]**, **[UserName]**, and **[EmailAddress]** place holders are replaced with information from the user definition of the logged-in user so are helpful if you want to automatically identify the user who sent the e-mail.

The **First Name**, **Last Name**, and **Job Title** fields are new fields in the User Definitions window. Complete these fields for all your users if you want to take advantage of the user-related place holders in your e-mails.



Based on the examples above, this is the e-mail that the customer will receive when user Josh e-mails an estimate:



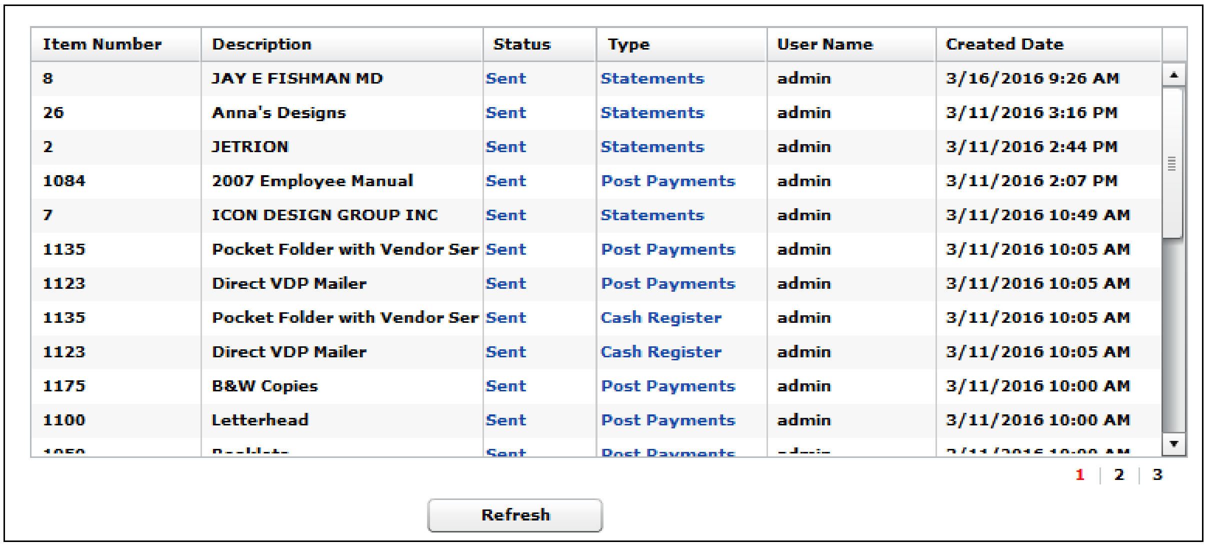
E-mail logging

E-mail logging lets you track when (or if) particular documents were e-mailed to customers.

When documents are e-mailed from the Cash Register, Post Payments, or Generate Statements window, the e-mails are automatically logged in System Monitor (**Admin > System Monitor > E-Mail Status**).

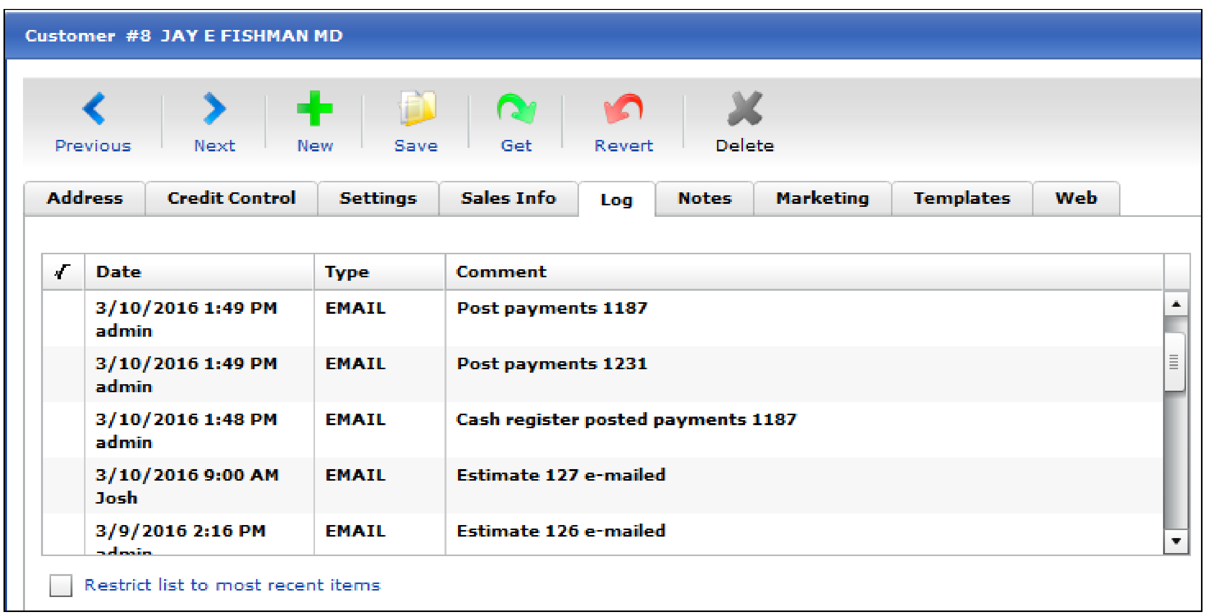
Note E-mailing logging for credit memos and purchase orders will be available in a future release.

You can see what types of documents were sent, who sent them, and when they were sent. Statements are identified by account number and name; invoices mailed from the Cash Register or Post Payments window are identified by invoice number and description.



Item Number	Description	Status	Type	User Name	Created Date
8	JAY E FISHMAN MD	Sent	Statements	admin	3/16/2016 9:26 AM
26	Anna's Designs	Sent	Statements	admin	3/11/2016 3:16 PM
2	JETRION	Sent	Statements	admin	3/11/2016 2:44 PM
1084	2007 Employee Manual	Sent	Post Payments	admin	3/11/2016 2:07 PM
7	ICON DESIGN GROUP INC	Sent	Statements	admin	3/11/2016 10:49 AM
1135	Pocket Folder with Vendor Ser	Sent	Post Payments	admin	3/11/2016 10:05 AM
1123	Direct VDP Mailer	Sent	Post Payments	admin	3/11/2016 10:05 AM
1135	Pocket Folder with Vendor Ser	Sent	Cash Register	admin	3/11/2016 10:05 AM
1123	Direct VDP Mailer	Sent	Cash Register	admin	3/11/2016 10:05 AM
1175	B&W Copies	Sent	Post Payments	admin	3/11/2016 10:00 AM
1100	Letterhead	Sent	Post Payments	admin	3/11/2016 10:00 AM

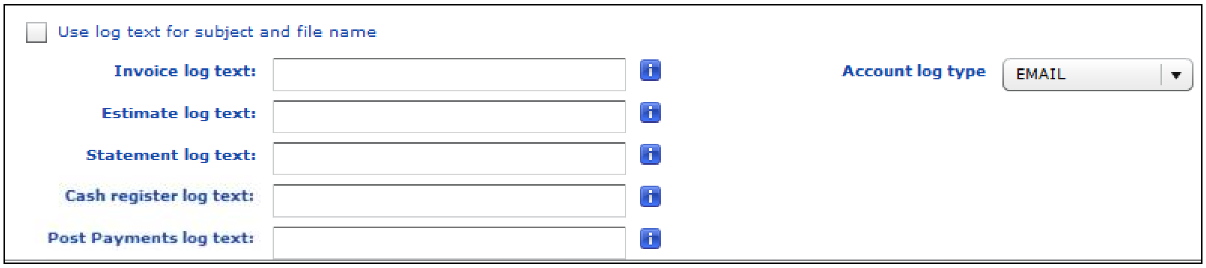
In addition, on the **Log** tab in customer accounts, you can track the e-mails that are sent from the Invoice, Estimate, Cash Register, Post Payments, and Generate Statements windows.



✓	Date	Type	Comment
	3/10/2016 1:49 PM admin	EMAIL	Post payments 1187
	3/10/2016 1:49 PM admin	EMAIL	Post payments 1231
	3/10/2016 1:48 PM admin	EMAIL	Cash register posted payments 1187
	3/10/2016 9:00 AM Josh	EMAIL	Estimate 127 e-mailed
	3/9/2016 2:16 PM	EMAIL	Estimate 126 e-mailed

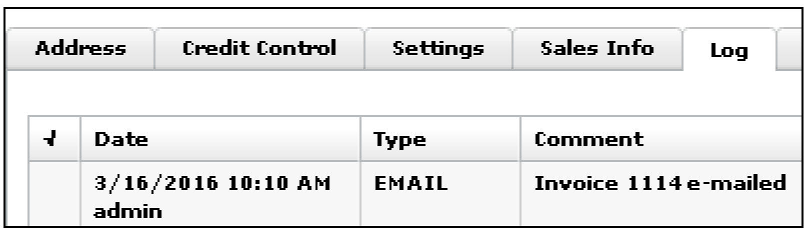
For this type of logging to occur, you must enter some text in the **log text** fields in the E-Mail preferences.

This text serves as the log entry that is recorded on the **Log** tab. The log text can include a **^0** place holder. Move the pointer over the to see what **^0** will be replaced with, for example, an invoice number or account number. For example, if you are e-mailing invoice number 2323, and the **Invoice log text** is **Invoice ^0 e-mailed**, the entry on the **Log** tab in the account will be **Invoice 2323 e-mailed**.

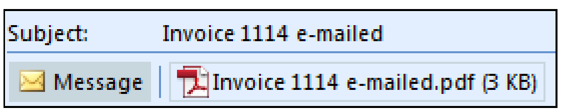


If a **log text** field is left blank, *nothing* is logged on the **Log** tab in customer accounts for that type of e-mail.

If you enter log text and also want to use it for the subject line of e-mails *and* the name of the attached PDF file, you can select the **Use log text for subject and file name** check box. Suppose the **Invoice log text** field includes **Invoice ^0 e-mailed**. This will be reflected in the **Comment** column on the **Log** tab in a customer account, for example, **Invoice 1114 e-mailed**.



If the **Use log text for subject and file name** check box is selected in the E-Mail preferences, the subject and PDF name will also be based on the same log text.

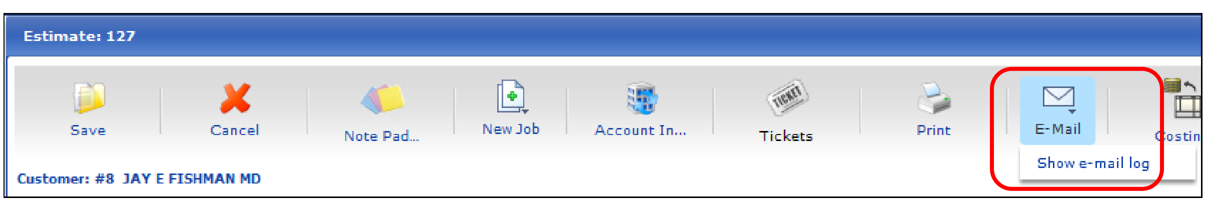


When the **Use log text for subject and file name** check box is *cleared*, the log text is used just for log entries, and the subject and PDF name follow the default conventions:

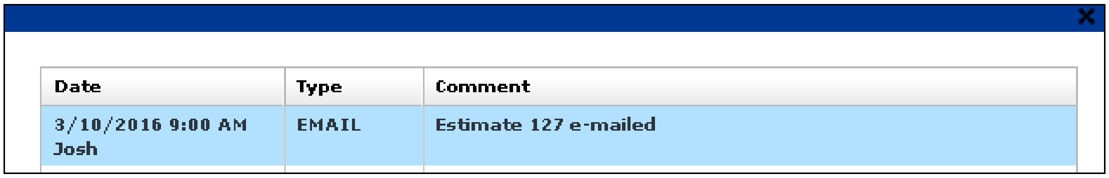
- The subject of the e-mail is ***Company Name*: *Document Type* #*xxx***, for example, **Vermont SuperPrints: Estimate #323**. (The company name is taken from the first line (**Company**) of the **Address** in your Company preferences.)
- The name of the PDF attachment is ***Document Type* #*xxx*.pdf**, for example, **Estimate #2334.pdf** or **Credit Memo #432.pdf**.

Note If you leave the log text fields blank, but select the **Use log text for subject and file name** check box, the subject and PDF name follow the default conventions above.

When the **Invoice log text** field or **Estimate log text** field includes text, an e-mail log is also available in the Invoice or Estimate window. While in one of these windows, you can click *and hold* **E-Mail** on the toolbar and then select **Show e-mail log**.



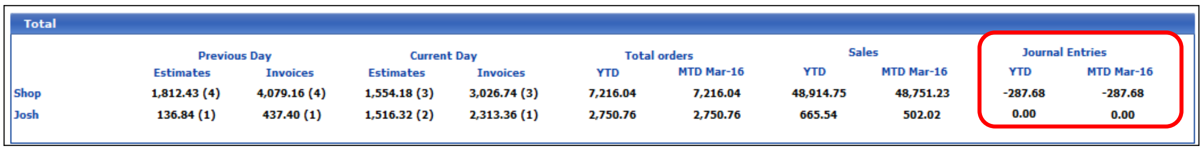
The window that opens lists any e-mails that were sent and indicates the date and time the e-mail was sent, the name of the logged-in user who sent the e-mail, and what was sent. If an estimate or invoice was e-mailed more than once, you will see multiple entries in the log.



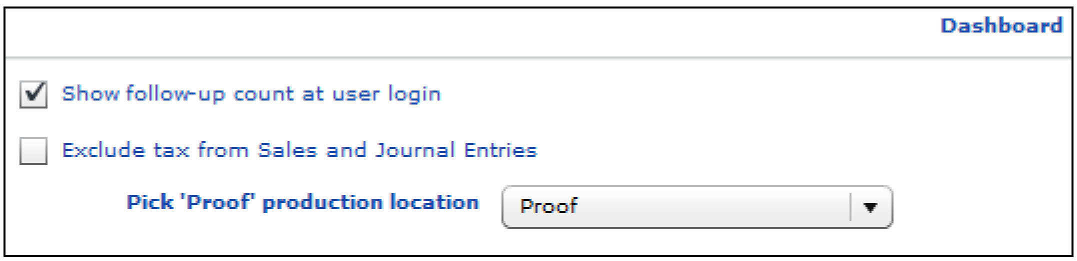
For more information about configuring e-mail, see the “E-Mail preferences” section of the *PrintSmith Vision – Setup and User Guide*.

Dashboard Enhancements

In both the desktop version of PrintSmith Vision and the mobile views, the Dashboard now includes figures for journal entries recorded and posted year-to-date and month-to-date. (These numbers may be negative.)



In addition, a new Dashboard preference, **Exclude tax from Sales and Journal Entries**, lets you control whether tax is part of the sales and journal entry totals in the Dashboard.



Temporary Contact Handling

As of PrintSmith Vision 3.3, if you edit the invoice contact in the Account Info window, you are now asked if you want to update the current permanent contact or create a new temporary contact. (Previously any changes to the contact always resulted in a temporary contact being created.)

In addition, if an invoice you are copying has a temporary contact, you are now asked if you want to convert the contact to a permanent one (so it is stored as part of the account). You can click **Yes** to convert the temporary contact or click **No** to leave it temporary.

Note If you are integrated with SugarCRM, keep in mind that temporary contacts are never synchronized with Sugar.

Corrections

The sections that follow describe the corrections that were made in PrintSmith Vision version 3.3. For your convenience they are categorized.

Localization

- Several labels were changed or added for Australian English. (Ref. 16224, 16320, 16340, 16455)
- The **Do not allow purchase order** label in the Charge Definitions window was added to the English UK and English Australian versions. (Ref. 16402, 16491)

Charges

- For shipping charges, the list of available shipping methods is now complete and matches what is in the Ship Via table. (Ref. 16225)

Digital Definitions

- The **Machine Cost per Copy/Sq. Unit** field now includes eight decimal places, which means calculations in millimeters are now correct. (Ref. 16148)

Stocks

- Clicking a stock more than once in the Stock Picker window was causing the system to hang. This was fixed. (Ref. 15077)
- When importing stocks if sheets/set = 0 for blank stock, the price of the imported blank stock is no longer zero. (Ref. 15928)
- If you select the **Price 1** thought **Price 5** check boxes under **Import Brackets** in the Import Stock Catalog window, close the window, and then re-open it, your **Import Brackets** selections are now retained. (Ref. 15768)
- If you select a stock for which inventory is tracked, but indicate it is customer-supplied, inventory levels are no longer adjusted. (Ref. 13415)

Accounts

- An error no longer occurs when you search for accounts in the Account Picker window. (Ref. 16471)
- The **Finance Charges YTD** field on the **Credit Control** tab for accounts now correctly shows two decimal places. (Ref. 7932)
- Values are now correctly saved in the **Annual Revenue** field on the **Marketing** tab for accounts. You can enter a number that includes . or , as well as a negative number. (Ref. 7476)
- If you change the invoice or statement address for an account and then edit and save the contact list, your changes to the invoice or statement address are no longer lost. (Ref. 15826)
- When a contact is the default contact for an account, the **Use Contact Address** check box in the contact record is now always cleared. (Ref. 16092)
- If a mandatory field is missing from an account or contact, the correct tab (e.g., **Marketing** tab) is now automatically displayed if the missing field is not on the default tab. (Ref. 16030)
- When accounts or contacts are imported into PrintSmith, if a record does not include information such as a phone or e-mail address, the labels for those fields are no longer displayed. (Ref. 15382)
- When you import accounts with a blank sales rep field, a warning about an unrecognized sales representative is no longer displayed. (Ref. 16200)
- When you import prospects into PrintSmith Vision, they are now correctly identified as prospects instead of customers. (Ref. 16188)

Estimating

Invoices and estimates

- In the Pending Documents window you can double-click any part of a line to open the document. (Ref. 15296)
- Mandatory fields are no longer checked in locked documents. (Ref.16206)
- You can now copy text such as the address, document name, or job description from locked or voided documents. (Ref. 16261)
- When you copied or converted a document, the document format was not always set correctly. This was fixed. (Ref. 16043)
- When you copy an estimate from history, the printed estimate now includes the correct ink color for jobs with special order stock. (Ref. 16439)
- If you change the due date from the Pending Documents window (by clicking **Due Date**), and a time was previously specified, the time no longer gets removed when the date is changed. (Ref. 16462)
- If you specify multiple quantities for a job (with **Multi-Quantity** under **Commands**) and apply a discount to the invoice, the printed invoice now includes the words **(with discount)** after the multiple quantities and prices to indicate a discount was applied. (Ref. 14409)
- If you specify multiple quantities for parts of a multi-part job (with **Multi-Quantity** under **Commands)**, and the invoice includes a discount percentage, the discount is now correctly calculated. *Known issue*: for discount amounts (versus percentages), the discount is not currently calculated properly. (Ref. 15588)
- In some situations, when multiple quantities were specified for a job (with **Multi-Quantity** under **Commands**), the prices in printed documents were incorrect. This was fixed. (Ref. 16396)
- Some corrections/improvements were made to the default invoice report (EFI_DefaultInvoice.rpt). (Ref. 16326)

Note	The way you customize an invoice is to base it on the pre-defined report (.rpt) file supplied by EFI. If you customized the invoice (for example, added your logo) in an earlier version of PrintSmith Vision, your customized invoice will not include the corrections made in version 3.3; the correction is just in the new EFI-supplied report file. You must re-create your custom invoice using the new EFI_DefaultInvoice.rpt file as the basis for your custom invoice.

Jobs

- If a stock without a size is selected for a job, the **Up / On** fields are now automatically set to **1**. (Ref. 14167)
- The time it takes to select a stock for a job was decreased. (Ref. 16247)
- If a double-sided printing job is converted to a large format job, the total copies are now calculated correctly. (Ref. 15865)
- The value in the **Markup** field for an outside services job can now include four decimal places. (Ref. 14683)
- The value in the **Unit Cost** field for an outside services job can now include eight decimal places. (Ref. 16226)
- When a multi-part job with multiple quantities (defined with **Multi Quantity** under **Commands**) includes an outside services, merchandise, or charges only sub-job *without* multi-quantity pricing defined, the price of the entire job now includes the price of the sub-job. (Ref. 15589)
- A **** (backslash) in the logged in user's name (e.g., **Counter\\Maria**) no longer causes job tickets to be blank. (Ref. 15961)
- Some user names were preventing job tickets from being printed. This was fixed. (Ref. 16395)

- Some corrections/improvements were made to the default job ticket report (EFI_JobTicket.rpt). (Ref. 16326)

Note	The way you customize a job ticket is to base it on the pre-defined report (.rpt) file supplied by EFI. If you customized the job ticket in an earlier version of PrintSmith Vision, your customized job ticket will not include the corrections made in version 3.3; the correction is just in the new EFI-supplied report file. You must re-create your custom job ticket using the new EFI_JobTicket.rpt file as the basis for your custom job ticket.

- Sometimes when you searched a large number of delivery tickets by account name, an error occurred. This was fixed. (Ref. 14940)
- You can now update the location in a delivery ticket without a needless warning being displayed. (Ref. 15340)
- If you remove a job from a delivery ticket, it is no longer included on the printed delivery ticket. (Ref. 16195)
- When you print labels from the delivery ticket (or from other places in PrintSmith Vision), and the name of the contact includes a prefix and/or suffix, the prefix and/or suffix is now included on the printed labels. (Ref. 16259)

POS

- If the invoice you are picking up exceeds the credit limit for a charge account and you click **No** when asked if you want to override the credit limit, you must now select a payment method in order to continue with the invoice pickup. (Ref. 14576)
- The time it takes to post invoices was significantly reduced. (Ref. 16123)
- If you void a picked-up invoice on the register tape and then pick up the invoice again, the total due in the cash register is now correct. (Ref. 16172)

Purchase Orders

- If you delete a purchase order in the Purchase Order History window, the buyer associated with that purchase order is no longer deleted. (Ref. 16276)
- When you generate a purchase order for an outside services job, the unit price in the purchase order is now taken from the unit cost (not sell price) in the job. (Ref. 15717)

Accounting

- The system now prevents you from doing more than one daily or monthly closeout at the same time. (Ref. 13997)
- When you perform a closeout and print the tape, the end of the tape now includes "Taken by" information. (Ref. 14060)
- The daily/monthly total sales amounts now match the categories total. (Ref. 16424)
- The **Avg. Days to Pay** (on the **Credit Control** tab in the customer account) is now correctly updated. You will see this after you update PrintSmith Vision to 3.3 and perform a monthly closeout. (Ref. 14564)
- Some transactions were being duplicated on the register tape and in the Invoice Pickup report. This was fixed. (Ref. 15593)
- When you post a journal entry for the walk-in account, and the **Update Customer Statistics** check box is selected, an error no longer occurs. (Ref. 16414)
- In the summary statement report, if an account does not have any unapplied credit, an **Unapplied Credits** line is still displayed between the statement information and the total. (Ref. 16039)
- The time it takes to generate a statement or account aging summary report for large amounts of data was reduced. (Ref. 16246)

- If you use the **Save report** option (on the **Reports** tab) for a statement or account aging report, the time it takes to generate the PDF for a large amount of data was significantly reduced. (Ref. 16183)
- Some corrections/improvements were made to the default journal entry report (EFI_JournalEntry.rpt) used for credit memos. (Ref. 16326)

Note	The way you customize a credit memo is to base it on the pre-defined report (.rpt) file supplied by EFI. If you customized the credit memo (for example, added your logo) in an earlier version of PrintSmith Vision, your customized credit memo will not include the corrections made in version 3.3; the correction is just in the new EFI-supplied report file. You must re-create your custom credit memo using the new EFI_JournalEntry.rpt file as the basis for your custom credit memo.

Reports

General

- You are now prevented from generating reports if you are not logged into PrintSmith Vision. (Ref. 16258)

Account History

- The time it takes to generate an Account History report when you click **Analyze** or **Analyze Selection** was reduced. (Ref. 14178)

Work in Progress

- When an invoice includes just a line item charge, its location is now correctly reflected in the Work in Progress Location report. (Previously the location was identified as "Unassigned.") (Ref. 14485)

Account Ranking

- The walk-in account is now in the correct order in the list when you run an Account Ranking report using one of the **Sales by…** ranking options. (Ref. 16204, 16295)

Administration

Users

- If a user who was imported from PrintSmith Classic enters an incorrect password when logging into PrintSmith Vision, a message now correctly explains the problem. (Ref. 16038)
- Other actions in PrintSmith Vision (e.g., creating or picking up an invoice) were removing the focus from the selected user in the User Definitions window. This was fixed. (Ref. 16263)

Table Editor

- When the **Table Status** of the Vendor table is set to **Add from Input and Edit**, and a vendor is entered during some procedure (e.g., while creating a new stock), the vendor is now retained for future use. The other **Table Status** properties for the Vendor table also now work correctly (Ref. 16208, 16262)
- By default, the Vendor table now includes a blank value. (Ref. 16209)
- Selections made in the **Table Status** field in the Table Properties window now work correctly for the Buyer, Driver, and Products tables. (Ref. 16311, 16387)

Delivery Ticket Manager

- On the **History** tab in the Delivery Ticket Manager window, completed tickets are now displayed in the same color that is used for documents that are ready for pickup in the Pending Documents window. (This color is specified in the Pending List preferences.) (Ref. 5506)

Digital StoreFront Integration

- When a Digital StoreFront order comes into PrintSmith Vision, the invoice address for the account is now used in the invoice that is created for the order. (Ref. 15756)
- The **Special Instructions** field in the Invoice window now includes just the delivery method and instructions specified in Digital StoreFront and any account notes specified in PrintSmith. (Ref. 16149)
- If a handling fee is specified for a Digital StoreFront order, it is now reflected in the shipping amount in PrintSmith Vision. (Ref. 15353)

Four51 Integration

- The invoice address in Four51 orders is now mapped correctly in the Account Info window. (Ref. 14513)
- The layout of the Web Worksheet window for Four51 jobs was improved. (Ref. 16186)

PrintSmith Site Integration

- When an invoice for an order from PrintSmith Site is accepted, its hold status is cleared from the Pending Documents window. (Ref. 14297)