

PrintSmith™ Vision Release Notes

Version 3.4
July / 2016

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EFI Productivity Suite | *PrintSmith Vision Release Notes*

July 2016 PrintSmith Vision 3.4

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About This Document

This document describes the enhancements and corrections that were made in PrintSmith™ Vision 3.4.

Contact Information

EFI Support

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Regular US Service Desk hours are 7 A.M. to 5 P.M. Mountain Standard Time, Monday – Friday

Regular UK Service Desk hours are 8 A.M. to 5 P.M. Greenwich Mean Time, Monday – Friday

Regular EU Service Desk hours are 9 A.M to 6 P.M. Central European Time, Monday – Friday

Note For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

EFI Professional Services

US Phone:	651.365.5321
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EFI Professional Services can help you perform EFI software installations and upgrades. This group can also help you implement, customize, and optimize your EFI software, plus offers a range of training options.

Important Information – Read This!

Do You Meet System Requirements?

Be sure you meet the system requirements listed on page 9.

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 Upgrading PrintSmith Vision

If you have PrintSmith Vision installed, and are updating it, see “Upgrading PrintSmith Vision” on page 39.

Known Issues

Mac OS X: PrintSmith server may be slow to start after upgrade to 3.4

On some Macs, after you upgrade PrintSmith Vision to version 3.4, the server may take a few minutes to start automatically the first time after the upgrade.

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

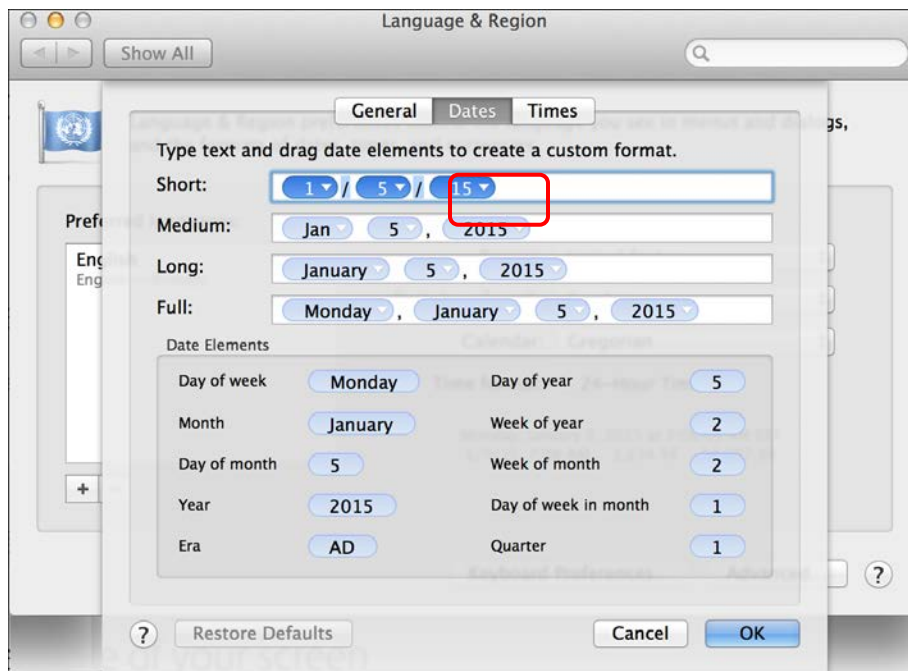
If you use Internet Explorer 10 or 11 as your browser, the following reports will not be generated and printed:

- 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**).



Digital StoreFront integration and account-level invoice charges

If an order is placed for an account with an invoice-level charge, the price of the charge is not included in the price that PrintSmith Vision sends back to Digital StoreFront so there will be a price mismatch.

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*.

Note If EFI is hosting PrintSmith Vision for you, the server requirements do not apply to you, but the client and other requirements do.

This section describes the technical requirements you must meet for the PrintSmith Vision server (see below) and for the client computers (see page 12).

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 13.

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 8 Windows 10 ** 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 10.

Windows 10 and existing PrintSmith Vision installations

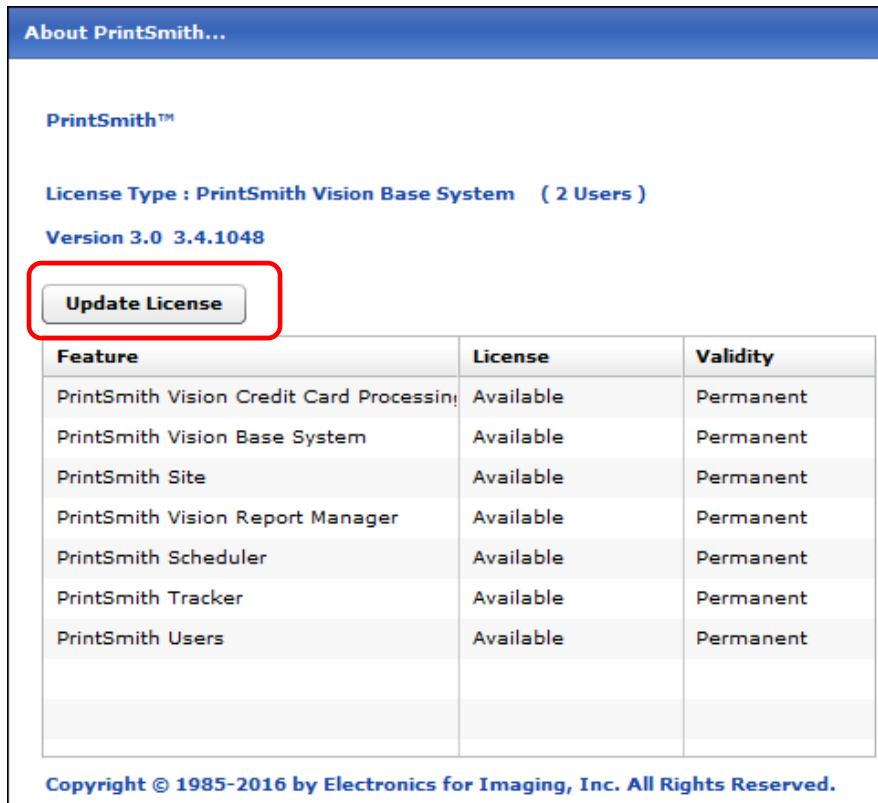
Windows 10 is supported for both the PrintSmith Vision server computer and client computers. If you want to upgrade your server to Windows 10, be sure to follow the instructions below for existing PrintSmith Vision installations.

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:*
 - a. *Before you uninstall PrintSmith Vision, log into the system.*
 - b. Select **Help > About PrintSmith**.
 - c. Click **Update License**.



About PrintSmith...

PrintSmith™

License Type : PrintSmith Vision Base System (2 Users)

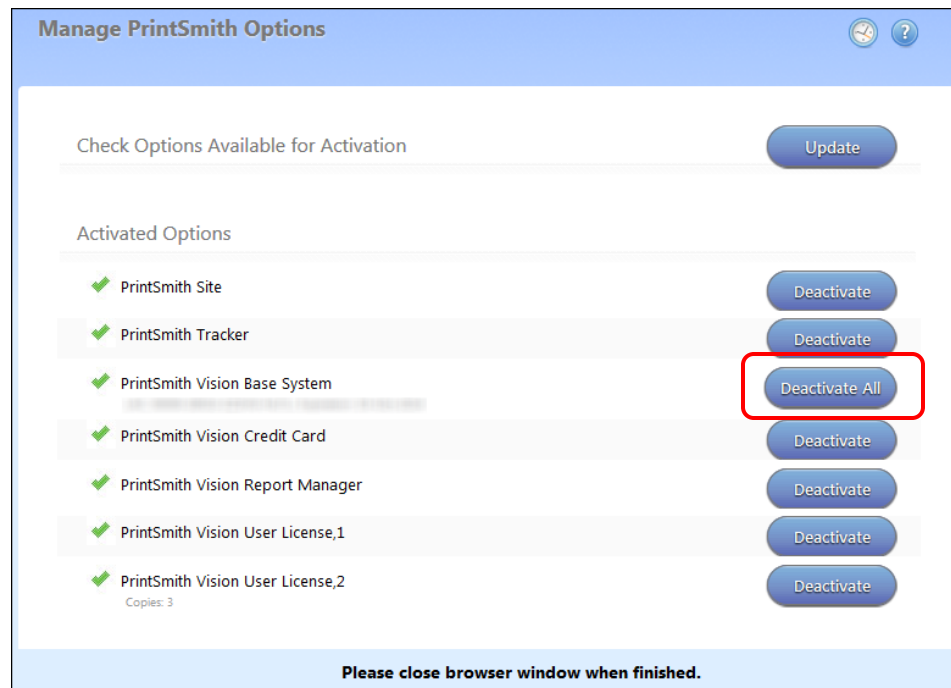
Version 3.0 3.4.1048

Update License

Feature	License	Validity
PrintSmith Vision Credit Card Processing	Available	Permanent
PrintSmith Vision Base System	Available	Permanent
PrintSmith Site	Available	Permanent
PrintSmith Vision Report Manager	Available	Permanent
PrintSmith Scheduler	Available	Permanent
PrintSmith Tracker	Available	Permanent
PrintSmith Users	Available	Permanent

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- d. In the Manage PrintSmith Options window, click **Deactivate All**.



- e. After the deactivation is confirmed, click **Finish**.
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 10.10, 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 10.10 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-3.4 version of PrintSmith Vision installed on a Mac, and want to upgrade your Mac to **OS X 10.11** (El Capitan), you must upgrade PrintSmith Vision to 3.4 *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® 51 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 1.5.0.25 is required.

Digital StoreFront Integrations

If you use PrintSmith Vision with Digital StoreFront®, Digital StoreFront 9.2 is required to take advantage of the new eFlow-based integration introduced in PrintSmith Vision 3.4 and Digital StoreFront 9.2.

Note If you are currently integrated with Digital StoreFront, *your integration will continue to work as is* after you upgrade to PrintSmith Vision 3.4. Once you upgrade to Digital StoreFront 9.2, you have the option of upgrading to the eFlow-based integration as described in the “Upgrading” chapter of the *PrintSmith Vision – Digital StoreFront Integration Guide*.

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.

New Features and Enhancements in PrintSmith Vision 3.4

PrintSmith Vision 3.4 includes the following enhancements.

New and Enhanced Integration with Digital StoreFront

The integration between PrintSmith Vision 3.4 and Digital StoreFront 9.2 is greatly enhanced, with far more data being exchanged and synchronized between the two systems.

Important The information below is a *summary* of the changes and new features in the integration to Digital StoreFront. For details of upgrading and using all the new features, see the *PrintSmith Vision - Digital StoreFront Integration Guide*.

If you are currently integrated with Digital StoreFront, *your integration will continue to work as is after you upgrade to PrintSmith Vision 3.4*. Once you upgrade to Digital StoreFront 9.2, you have the option of upgrading to the eFlow-based integration as described in the “Upgrading” chapter of the *PrintSmith Vision – Digital StoreFront Integration Guide*.

As with earlier integrations, product pricing is always controlled in Digital StoreFront. This now also includes pricing for media, print services, and shipping.

eFlow-based integration

The new integration between PrintSmith Vision and Digital StoreFront uses a completely different method (named eFlow) for exchanging data and messages between the two systems. This method is based on BOD (Business Object Definition), a standard for data created by an independent organization.

To connect PrintSmith Vision to Digital StoreFront, you must define an eFlow MIS communication channel in Digital StoreFront and then define your MIS system in Digital StoreFront to use that channel, as well as specify some other settings to configure the MIS. In PrintSmith Vision, you must then set your Integration preferences to connect to Digital StoreFront using eFlow.

Note If you are currently integrated with Digital StoreFront, you must complete the same steps as new users, but you will be re-defining your current MIS in Digital StoreFront and editing your current Integration preferences in PrintSmith Vision.

For complete details of setting up an eFlow-based integration, see the *PrintSmith Vision - Digital StoreFront Integration Guide*.

Accounts and contacts

If you are currently integrated with Digital StoreFront, you have contacts in PrintSmith linked to users in Digital StoreFront via contact IDs (which had to be entered in both systems). When you upgrade to the new integration, you will synchronize the existing contacts from the **Settings** tab on the MIS Systems page in Digital StoreFront. These contacts will now be linked using the new communication method.

New accounts or contacts, however, are now always created in PrintSmith Vision, and information about them is sent to Digital StoreFront (to create companies or users) using a process known as *registration*. If you change some information about a contact in PrintSmith Vision, you can update the information in Digital StoreFront. You can also *unregister* accounts and contacts, which removes them from Digital StoreFront.

Information about accounts and contacts is always controlled by PrintSmith Vision. As a result, information about companies (accounts) and users (contacts) is *never* sent from Digital StoreFront to PrintSmith Vision. For example, if you update a company or user in Digital StoreFront, the corresponding account or contact is *not* updated in PrintSmith Vision.

Typically, if an account has many contacts, you will want only some of them to be users (buyers) in Digital StoreFront. Each such contact *must* have an e-mail address and a DSF user name defined in PrintSmith Vision.

You can register accounts and contacts in several ways:

- From the **Web** tab in the Customer window

The screenshot shows the 'Customer #24 AR Wedding Planners' window. At the top, there is a navigation bar with icons for Previous, Next, New, Save, Get, Revert, and Delete. Below this is a tabbed interface with 'Address', 'Credit Control', 'Settings', 'Sales Info', 'Log', 'Notes', 'Marketing', 'Templates', and 'Web'. The 'Web' tab is active. Underneath, there are two main sections: 'Site Info' and 'DSF Info'. The 'Site Info' section contains a 'Web Company ID' field with a 'Register Account' button and a message: 'Unable to register without a valid phone number.' Below that is an 'Assign Catalog' button and a dropdown menu. The 'DSF Info' section is highlighted with a red box and contains a 'Register Account' button, 'Last Registration Date', 'Registration Status', and an 'Unregister Account' button.

If the account you are registering includes multiple contacts, you are given a choice of registering all or some of the contacts.

- From the **Web** tab in the Contact window

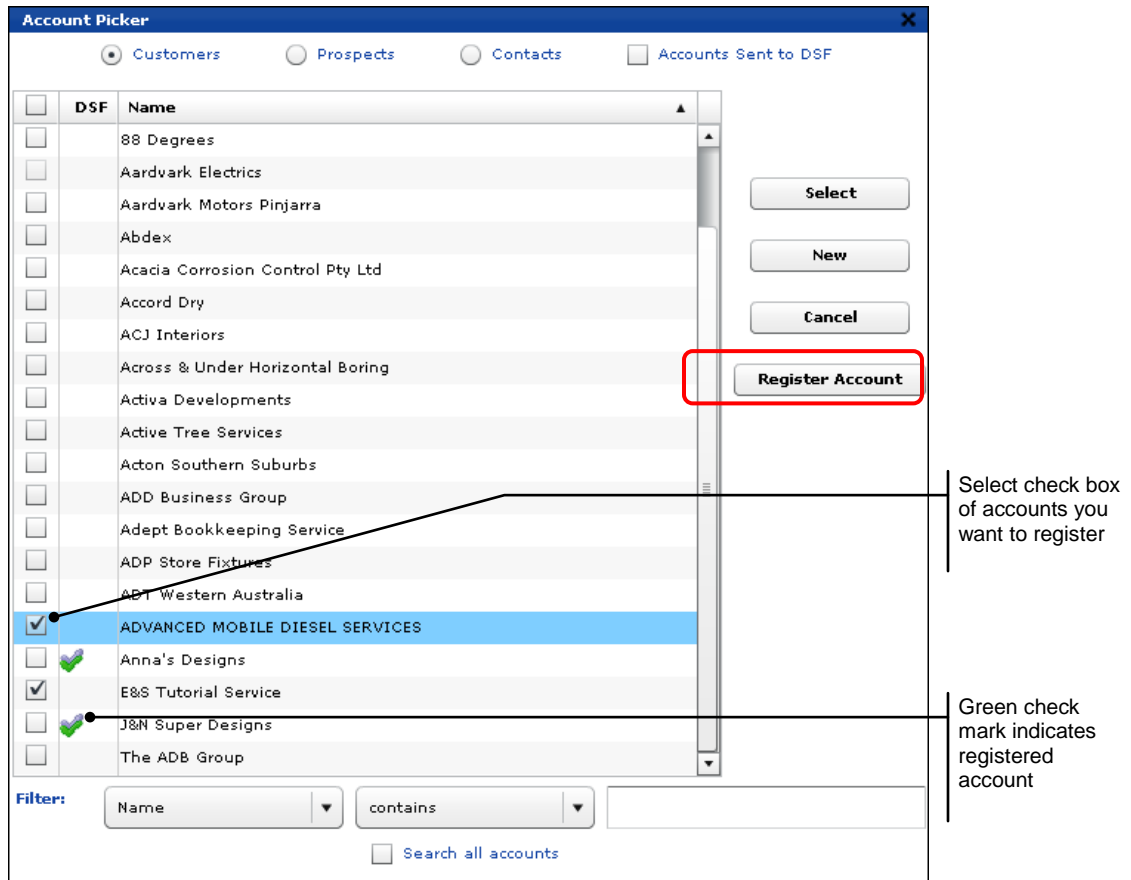
When the contact is registered, the contact's account is also registered (if not already registered).

DSF User Name is required for registration

The screenshot shows the 'Contact' window with tabs for 'Address', 'Marketing', 'Campaigns', 'Credit Info', and 'Web'. The 'Web' tab is active. There is an 'Assign Catalog' button and a dropdown menu. Below this is the 'DSF Info' section, which is highlighted with a red box. It contains a 'DSF User Name' field with the value 'Roger Richards', a 'Register Contact' button, 'Last Registration Date', 'Registration Status', and an 'Unregister Contact' button. A red box also highlights the 'DSF Info' section header.

- From the Account Info window

If the default invoice contacts for accounts that you want to register in Digital StoreFront *already* have an e-mail address and DSF user name defined, you can register all the accounts and all their default invoice contacts in one step from the Account Picker window.



For complete details of registering accounts and contacts, see the *PrintSmith Vision - Digital StoreFront Integration Guide*.

Stocks

You can now fully control the stocks (and their pricing) that are available to buyers when they place orders in Digital StoreFront. You define stocks in PrintSmith Vision and send information about them to Digital StoreFront (where they are known as media). As with accounts and contacts, this process is known as *registering* stocks.

The registered stocks must then be priced in Digital StoreFront – which always controls the pricing. (You should still price stocks in PrintSmith for non-Digital StoreFront orders, but this pricing is ignored for Digital StoreFront orders.)

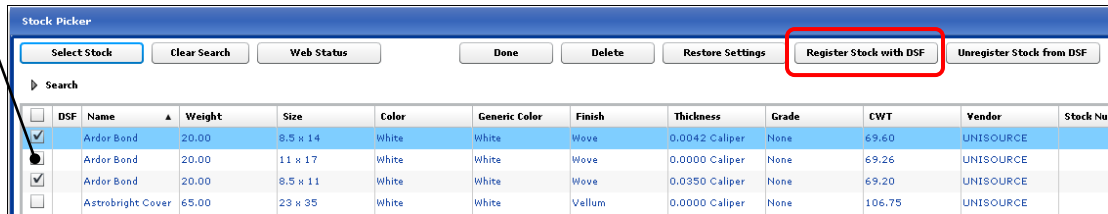
Except for pricing, information about stocks is always controlled from PrintSmith Vision – the information is sent from PrintSmith Vision to Digital StoreFront. Information about stocks is never sent from Digital StoreFront to PrintSmith Vision. For example, if you create media in Digital StoreFront, no corresponding stock is created in PrintSmith Vision.

Note For stock to be registered as media in Digital StoreFront, the stock definition must include a **Thickness** (on the **Specification and Pricing** tab) and a **Normal Run Size** (on the **Pricing** tab) in the Stock Definitions window.

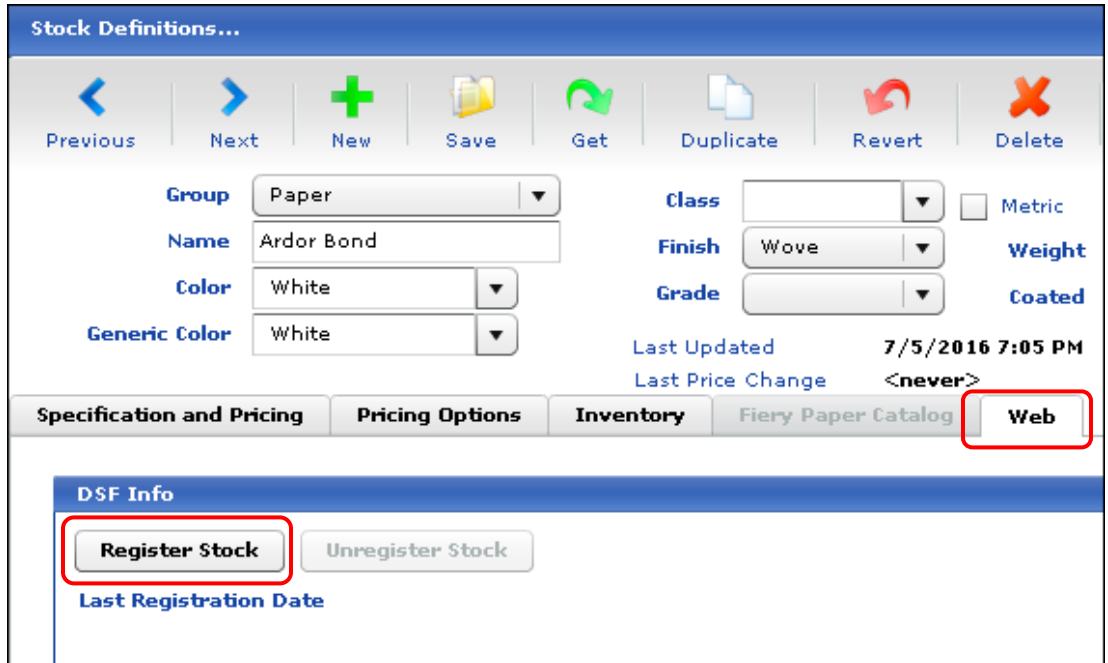
You can register and unregister stocks in two ways:

- Register multiple stocks at the same time from the Stock Picker window.

Select check boxes of stocks you want to register



- Register stocks individually from the **Web** tab in the Stock Definitions window.

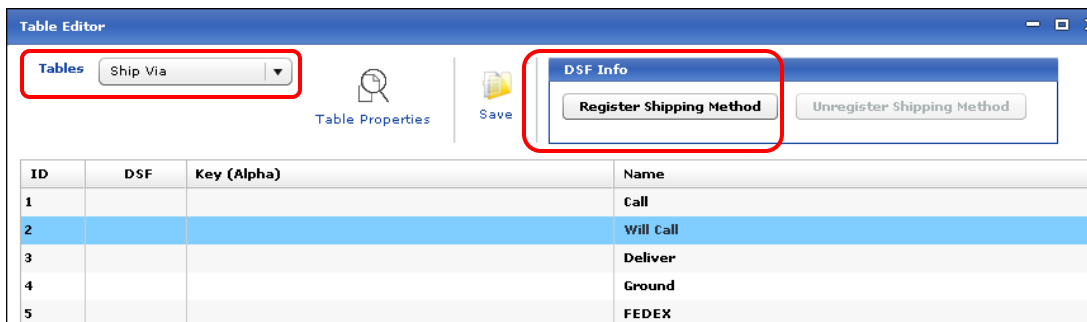


Once registered, the stocks are part of the media catalog in Digital StoreFront and can be priced and included in ticket templates. When a ticket template is associated with a product in Digital StoreFront, buyers ordering that product will be able to choose the media specified in the ticket template.

Shipping methods

Any shipping method that you want to be available to buyers in Digital StoreFront must be registered in Digital StoreFront, where it is known as a *delivery method*.

You register and unregister shipping methods by editing the Ship Via table with Table Editor.



Once registered, the shipping methods are listed on the Delivery Methods page in Digital StoreFront. The registered shipping methods must then be priced in Digital StoreFront – which always controls the pricing. You

must also associate the shipping methods with your print shop and optionally your companies so the shipping methods are available to buyers when they place orders. The shipping costs then come through in the orders.

In addition, when a registered shipping method is selected for a Digital StoreFront order, the method is automatically displayed in the **Ship Via** field in the Account Info window, as well as in the **Ship Via** field on the **Deliver How** tab in the Delivery Ticket window.

Products

If you are currently integrated with Digital StoreFront, you have Web products in PrintSmith linked to products in Digital StoreFront via SKUs (which had to be entered in both systems). When you upgrade to the new integration, you will synchronize the existing products from the **Settings** tab on the MIS Systems page in Digital StoreFront. These products will now be linked using the new communication method.

In the new integration, product mapping is handled differently. You no longer have to enter SKUs in both systems to create a one-to-one mapping. Instead you map your Web product templates in PrintSmith Vision to one or more Digital StoreFront products. For example, on the Web site you may offer several types of business cards, but they are all produced the same way. You can therefore map all the business card products to a single business card template in PrintSmith Vision.

The **Products** tab in the PrintSmith Vision Web Administration window includes a new **DSF Info** section.



After you create a Web product with a template, you can click **Map to DSF Product** to select the products you want to map to this product template.

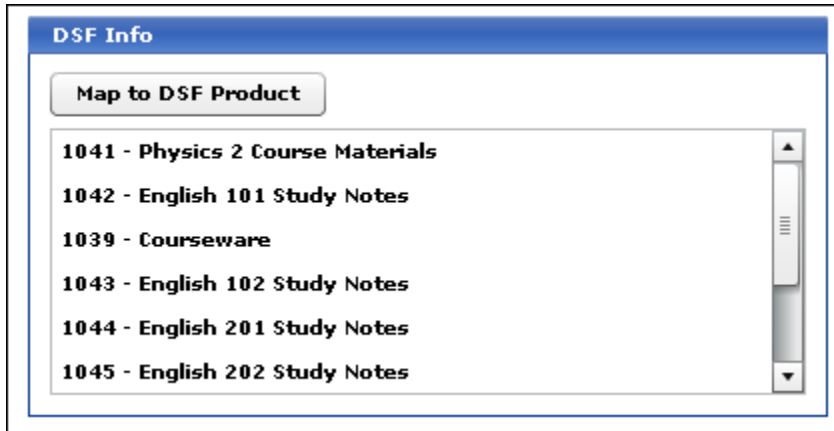
Notes These products must already exist in Digital StoreFront.

While a product template can be mapped to many Digital StoreFront products, a Digital StoreFront product can only be mapped to one product template.

Selected	DSF Product Name	DSF Product Display	Description	DSF Product ID	DSF SKU ID
<input checked="" type="checkbox"/>	Physics 2 Course Mate	Physics 2 Course Mate		1041	
<input checked="" type="checkbox"/>	English 101 Study Note	English 101 Study Note		1042	
<input checked="" type="checkbox"/>	Courseware	Chemistry 100 Course		1039	
<input checked="" type="checkbox"/>	English 102 Study Note	English 102 Study Note		1043	
<input checked="" type="checkbox"/>	English 201 Study Note	English 201 Study Note		1044	
<input checked="" type="checkbox"/>	English 202 Study Note	English 202 Study Note		1045	
<input checked="" type="checkbox"/>	Physics 3 Course Mate	Physics 3 Course Mate		1046	
<input checked="" type="checkbox"/>	Physics 4 Course Mate	Physics 4 Course Mate		1047	
<input type="checkbox"/>	Promotional Hats	Promotional Hats		1049	

Filter:

The products mapped to the currently selected Web product are then listed under **DSF Info**.



When an order for one of these products comes into PrintSmith Vision, the mapped Web product template will automatically open in the Job window for the order.

Digital StoreFront print services and PrintSmith Vision finishing charges

Digital StoreFront includes numerous print services and options such as binding or folding. These are similar to finishing charges in PrintSmith Vision.

In Digital StoreFront, you add print services to a ticket template. You then associate a ticket template with print products in Digital StoreFront. (Typically a template is associated with multiple products that share similar characteristics.)

When buyers order a print product, the print services they can choose depend on the ticket template that was associated with the product.

In PrintSmith Vision you can map print services to finishing charges. As a result, when a buyer selects a print service like blue coil binding for the job, and this print service is mapped to a blue coil binding finishing charge in PrintSmith, the job coming into PrintSmith will automatically have this print service/finishing charge included.

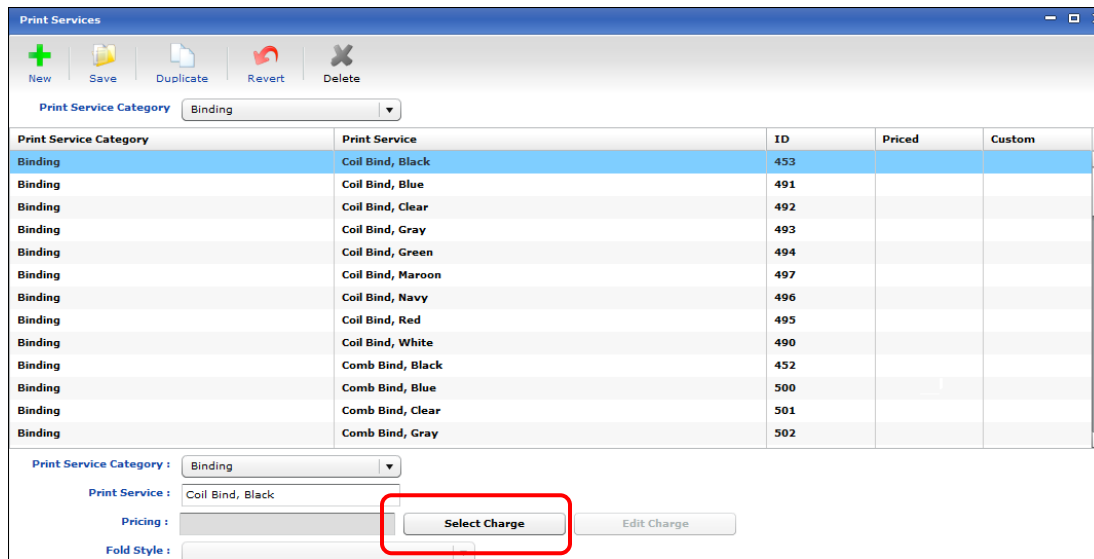
Important The price for a print service in the job *always* comes from Digital StoreFront and overrides the price of the corresponding charge in PrintSmith Vision.

In addition, if you are using a Fiery, the print services in a job can be passed along to the Fiery. For example, if the job includes a folding or binding print service, the Fiery receives the instructions it needs to produce the job in terms of the kind of folding or binding that was requested. (For information about how print services are used when you are integrated with a Fiery, see page 25.)

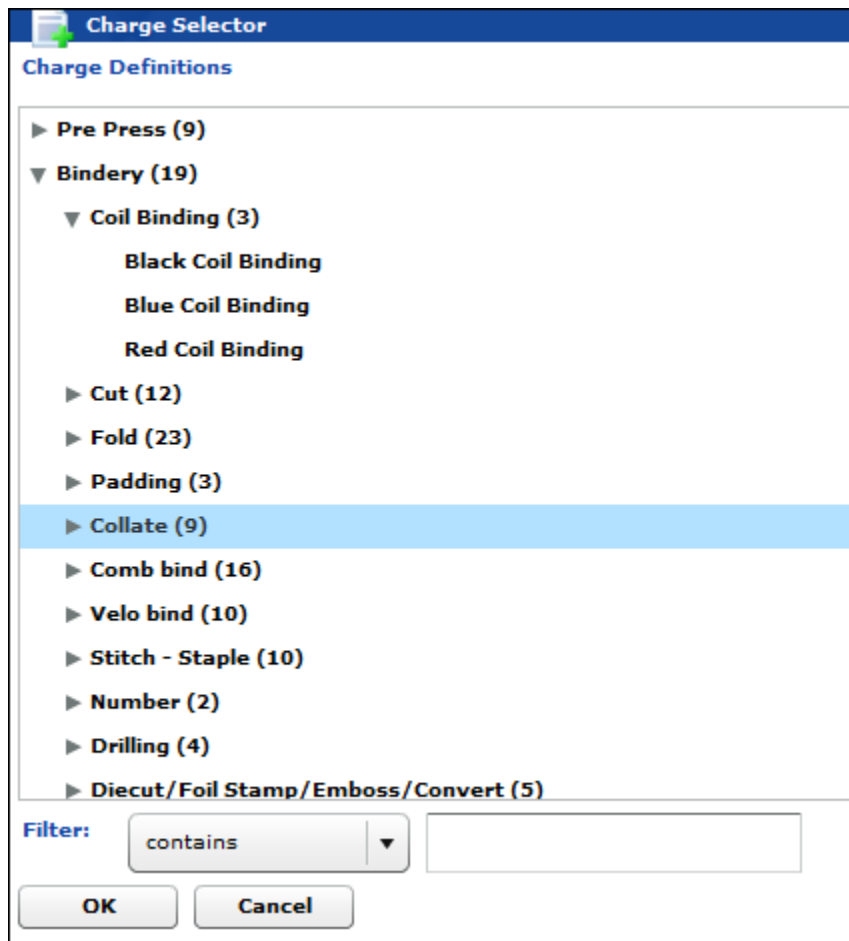
By default, all the standard print services that are available in Digital StoreFront are available for mapping in PrintSmith Vision. You do not need to map all the print services to charges, just the ones that you commonly include in your Digital StoreFront ticket templates.

Note The pricing for the print services is defined in Digital StoreFront. When a print service that is mapped to a PrintSmith charge is selected for a Digital StoreFront order, the price of the print service overrides the price of the corresponding PrintSmith charge.

In PrintSmith Vision, you map print services to finishing charges by selecting **Pricing > Print Services**. You then select a print service in the list and click **Select Charge**.



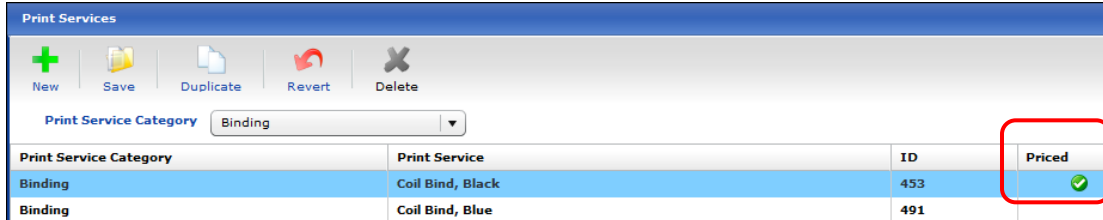
In the Charge Selector window, you select the charge you want to map to the print service you selected.



The **Pricing** field at the bottom of the Print Services window now displays the name of the charge you selected.

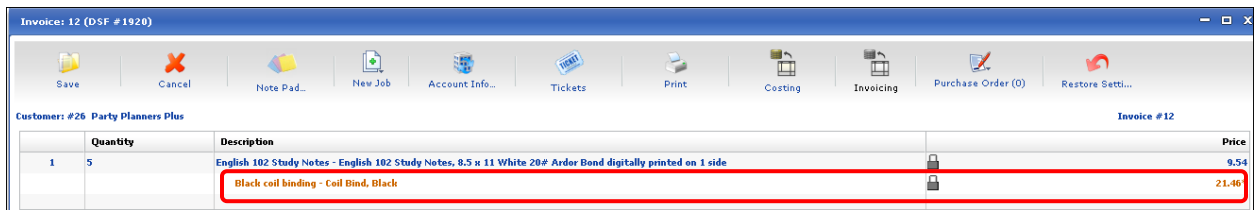


After you click **Save** on the toolbar, the **Priced** column now includes a check mark.



When a mapped print service is part of an order coming in from Digital StoreFront, it is displayed in orange as a line item in the Invoice window. The price has an * (asterisk) next to it to indicate that the price comes from Digital StoreFront and is overriding the charge price as defined in PrintSmith.

Note If a buyer selected a print service that is not mapped to a charge, it is not shown as a line item in the invoice, but is still listed on the Web worksheet.



Custom print services

You can also define custom print services in Digital StoreFront and send them to PrintSmith Vision (by clicking **Synchronize Print Services** on the **Settings** tab on the MIS Systems page). As with other print services, you can map custom print services to PrintSmith Vision charges. In addition, if you are also integrated with a Fiery, you can map the custom print service to a Fiery capability (select **Admin > Fiery Integration**, select your Fiery device, and click **Edit**).

When this mapped custom print service is then part of a job that is submitted to the Fiery, the Fiery will receive the appropriate instructions.

Special pages

Digital StoreFront supports *special pages*. When a ticket template allows it, buyers can treat certain pages in a job differently, for example, buyers may want most of the job printed in black-and-white, but want some pages printed in color on different paper or even with a different orientation (for example, landscape to accommodate a foldout insert). What buyers can do depends on how a ticket template was configured.

Note If the buyer selects mapped media (stock that was registered) for special pages, and the stock is inventoried in PrintSmith Vision, the inventory is not adjusted for the special pages.

When buyers define special pages, for example, select a different colored paper for the cover sheet of a job, that information is displayed in a new **Special Pages** section in the PrintSmith Job window.

Special Pages

Single Sided

Double Sided

From 1 to 2, Duplex, B&W

You cannot add or delete special pages in a Digital StoreFront order, but you can click **Edit** to review or change the special page(s).

Note If the buyer's media selection for special pages was not mapped to a stock in PrintSmith (by being registered), the buyer's stock selection will not be reflected in the Special Page window in PrintSmith. Instead, the **Stock** field will default to the stock selected in the associated Web product template in PrintSmith. For this reason, you should avoid including unmapped media in your Digital StoreFront ticket templates.

Special Page

Previous Next Save Cancel

From 1 To 2

Print Service Category	Print Service	ID
Print In Color/Sides	Print In Black and White, Double Sided	539

Single Sided B&W
 Double Sided Color

Stock: 65.0# Classic Crest Cover

Color:

Tip Special pages can be created for any digital job you create in PrintSmith Vision, but your selections will not be reflected in the pricing. For example, if you select a more expensive paper for some pages, the price of the job will not account for this (it will still use the price of the stock selected for the job).

Single Sign-On (SSO) from PrintSmith Vision to Digital StoreFront

You now have a way to allow users who are logged into PrintSmith Vision to get to Digital StoreFront directly from the QuickAccess panel and not have to log into Digital StoreFront. A user just needs to sign in once to PrintSmith Vision.

Important SSO in Digital StoreFront means something different, and typically involves the use of Active Directory or a similar solution. The SSO feature in PrintSmith Vision is simply a way to click a button in PrintSmith Vision to get to Digital StoreFront and be automatically logged in.

The automated signon works in one direction only – from PrintSmith to Digital StoreFront. You cannot log into Digital StoreFront and be logged into PrintSmith automatically.

Before you can set up SSO to Digital StoreFront, PrintSmith Vision must already be integrated with Digital StoreFront using the new eFlow method.

Note Users in Digital StoreFront must be part of the CSR group to take advantage of SSO from PrintSmith Vision.

To make this type of single sign-on available for a user, you must generate a unique token in the User Definitions window in PrintSmith Vision. When you click **Generate Token** next to the **DSF SSO Token** field, a unique set of characters is generated. (You cannot edit the **DSF SSO Token** field.)

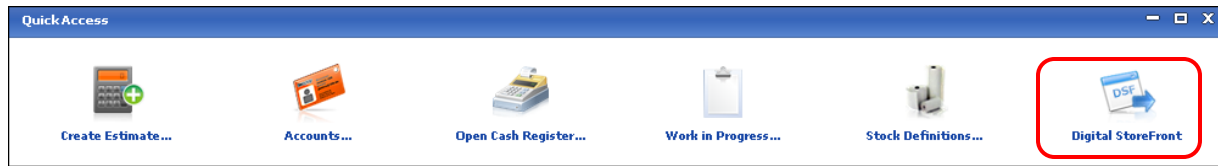
User Definitions		
Lori	Counter	60
Manager	Manager	80
Mary	System Admin	99

User Name	<input type="text" value="Mary"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>
Job Title	<input type="text"/>
	<input type="checkbox"/> Disable user name
Access Group	<input type="text" value="System Admin"/>
Access Level	<input type="text" value="99"/>
E-Mail	<input type="text" value="MaryJones@mycompany.com"/>
E-Mail User Name	<input type="text"/>
E-Mail Password	<input type="password"/>
DSF SSO Token	<input type="text" value="SBCMQntvAWsg8QbWTZym"/> <input type="button" value="Generate Token"/>

After you generate the DigitalStoreFront SSO token in PrintSmith Vision, you must enter it in the user's profile in Digital StoreFront. (The user must be part of the CSR group.) Edit the user's profile and copy the token that was generated in PrintSmith to the **SSOToken** field (near the bottom of the user profile fields). What you enter here must match exactly what was generated in PrintSmith.

SSOToken:	<input type="text" value="SBCMQntvAWsg8QbWTZym"/>
------------------	---

When the tokens match on both sides, the user can now click **Digital StoreFront** in the PrintSmith Vision QuickAccess panel, and be taken directly to Digital StoreFront where the user is automatically logged in without having to enter his or her Digital StoreFront login credentials.



Fiery Integrations

The integration with the Fiery was enhanced to take advantage of Fiery capabilities.

Mapping Fiery capabilities to print services

When you run the wizard to add a Fiery, the capabilities of the Fiery device are automatically mapped to print services. These are print services that are defined in Digital StoreFront, but you do *not* need to be integrated with Digital StoreFront to take advantage of this feature.

Note This feature does not apply Fiery Central – a message will inform you that the device has no capabilities that can be mapped.

Typically, you do not need to map anything manually in the wizard, but you can do so if you want. For example, if you create a custom print service in PrintSmith Vision, you can map it here to a Fiery capability. (For information about custom print services, see page 27.)

28 out of 51 capabilities could not be mapped automatically.
Please click the below grid and then do manual mapping.

Fiery Capabilities	Print Services
▶ ColorantControl	Print In Color/Sides
▼ Component	Orientation
✔ Orientation:Rotate0	Portrait
✔ Orientation:Rotate180	Landscape
! Orientation:Flip0	Please select a print service
! Orientation:Flip180	Please select a print service
! Orientation:Flip270	Please select a print service
! Orientation:Flip90	Please select a print service
! Orientation:Rotate90	Please select a print service
▶ FoldingParams	Fold
▶ HoleMakingParams	Drill
▶ LayoutPreparationParams	Duplex
▶ StitchingParams	Staple

Mapping print services to finishing charges

In PrintSmith Vision you must then map the print services to finishing charges. When a print service is mapped to a finishing charge in PrintSmith, the print service can be added to a job that you submit to the Fiery. For example, if you add a folding or binding print service to a job, the Fiery receives the instructions it needs to produce the job in terms of the kind of folding or binding that was requested.

Tips You do not need to map all the print services to charges, just the ones that are most likely to be used for the jobs you submit to the Fiery.

You may not have charge definitions that correspond to the available print services. In this case you can create new charges and then map them.

In addition, because the print service is mapped to a charge in PrintSmith, the pricing for the charge is reflected in the job.

Note If you are integrated with Digital StoreFront, the price for a print service in the job *always* comes from Digital StoreFront (and overrides the price of the charge in PrintSmith).

In PrintSmith Vision, you map print services to finishing charges by selecting **Pricing > Print Services**. The procedure is identical to the one described on page 21.

When you create a job that you plan to submit to the Fiery, you can select print services for it.

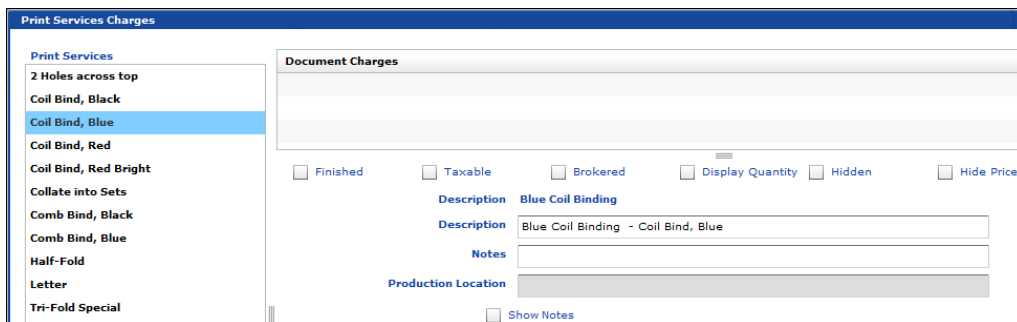
Notes To provide finishing instructions to the Fiery, always add print services, not charges to the job. You can still include charges, but that information is not conveyed to the Fiery.

If a job originated in Digital StoreFront, the print services are already included and passed onto the Fiery when you submit the job.

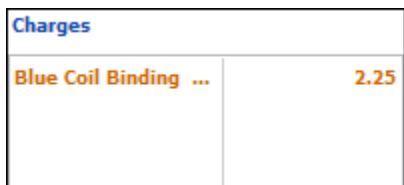
To add print services for any finishing options you want to convey to the Fiery, click **Print Services** under **Charges** in the Job window.



The Print Services Charges window opens and lists all the print services that are mapped to PrintSmith charges (the ones you mapped with **Pricing > Print Services**). You select the print service you want and click **Add**.



After you add all the print services you want and click **Done**, the print service is listed under **Charges** in the Job window. It is in orange to distinguish it from any regular charges you might add (which are displayed in black).



When a job with print services is submitted to the Fiery, you can see the print service on the **Job Info** tab in the JDF Settings window:

The screenshot shows the 'JDF Settings' window with the 'Job Info' tab selected. The job name is 'Coil bound copies', Job ID is '1243_1 (50054)', and the source is 'PrintSmith Digital Press Connector'. The 'Job Header' section contains Job Part ID, Related Job ID, Related Job Part ID, and Project ID. The 'Scheduling' section shows Priority, Due Date (7/14/2016 9:30:00 AM), Start, End, and Created (7/7/2016 11:46:01 PM). The 'MIS Details' section has dropdown menus for Chargeable, Work Type, Work Type Details, and Operation Mode, all set to 'Unknown'. The 'Comments' section has an 'Add' button and a comment box containing 'Binding: Coil Bind, Blue', which is highlighted with a red rectangle.

Custom print services

You can also create custom print services using **Pricing > Print Services** in PrintSmith Vision and clicking **New**.

If you then edit your Fiery device (by selecting **Admin > Fiery Integration**, selecting your Fiery device, and clicking **Edit**), you can map the custom print service to a Fiery capability.

When this mapped custom print service is then added to a job that you submit to the Fiery, the Fiery will receive the appropriate instructions.

Tip For information about the Fiery integration, see the *PrintSmith Vision – Fiery Integration Guide*.

Ability to Make Additional Fields Required

You can now use the Mandatory Field preferences to make *any* of the fields on the **Marketing** tab for accounts required.

Mandatory Fields		
Mandatory	Area	Field Name
<input checked="" type="checkbox"/>	Account	Name
<input checked="" type="checkbox"/>		Address Street
<input checked="" type="checkbox"/>		Address City
<input checked="" type="checkbox"/>		Address State
<input checked="" type="checkbox"/>		Address Postal Code
<input type="checkbox"/>		Address Country
<input type="checkbox"/>		Ref 1 Desc
<input type="checkbox"/>		Ref 2 Desc
<input type="checkbox"/>		Ref 3 Desc
<input type="checkbox"/>		Freq Flyer 1
<input type="checkbox"/>		Freq Flyer 2
<input type="checkbox"/>		Business Number
<input type="checkbox"/>		Business Account
<input type="checkbox"/>		Membership
<input type="checkbox"/>		LinkedIn
<input type="checkbox"/>		Company Web Page
<input type="checkbox"/>		Business Type
<input type="checkbox"/>	Number of Employees	
<input type="checkbox"/>	Lead Source	
<input type="checkbox"/>	Common Interest	
<input type="checkbox"/>	Sport Interest	
<input type="checkbox"/>	Likes	
<input type="checkbox"/>	User 8	
<input type="checkbox"/>	User 4	
<input type="checkbox"/>	User 9	
<input type="checkbox"/>	Type of Work	
<input type="checkbox"/>	Mailer Type	
<input type="checkbox"/>	Contact	Contact First Name
<input type="checkbox"/>		Contact Last Name
<input type="checkbox"/>		Contact Job Title

In addition, you can make the **Gender** and **Age Range** fields on the **Marketing** tab for contacts required.

Purchase Order Enhancements

- Purchase order numbers are assigned automatically, but you now have the option of entering a specific PO number or changing the numbering sequence. (This works the same as for estimates and invoices.) (Ref. 16509, 16605)

Purchase Order ** new **

Purchase Order DES ** new **

Supplier **Change Supplier...**

Buyer **Phone**

- The **Description** field in the Purchase Order window no longer has a character limit. If the description is very long a scroll bar is available. (Ref. 16565)
- You can now use **Invoice > Review Any Document** to open a purchase order by entering its PO number. (Ref. 16653)

Invoice Estimate Web Reference External ID **PO #**

PO #:

OK **Cancel**

- The PO Settings preferences include new check boxes (**Allow Prefix modification** and **Allow Suffix modification**) to control whether a prefix or suffix can be edited in purchase orders. (Ref. 16805)

PO Settings

Purchase Order

Prefix	Document#	Suffix
DES	123456789	
(max 6)		(max 6)

Sample DES123456789

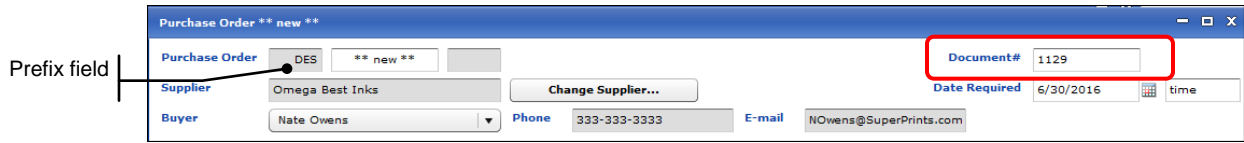
Allow Prefix modification

Allow Suffix modification

Allow Raised PO

- Invoices
- Jobs
- Charges
- Stocks
- Generic Blank
- Stock Orders

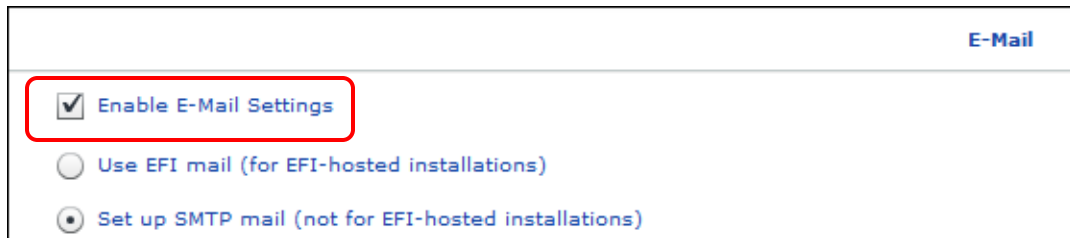
- The Purchase Order window now includes a **Document#** field for the invoice number. This document number is included in Purchase Order History, as well as in printed purchase orders. The Purchase Order window also includes prefix/suffix fields which you can edit if the PO Settings preferences allow this. In the figure below, they cannot be edited. (Ref. 16653)



- When you click **Save** to save a purchase order, the Purchase Order window closes. You can now use **File > Save** to save a purchase order but leave the Purchase Order window open. (Ref. 16653)

E-Mail Enhancements

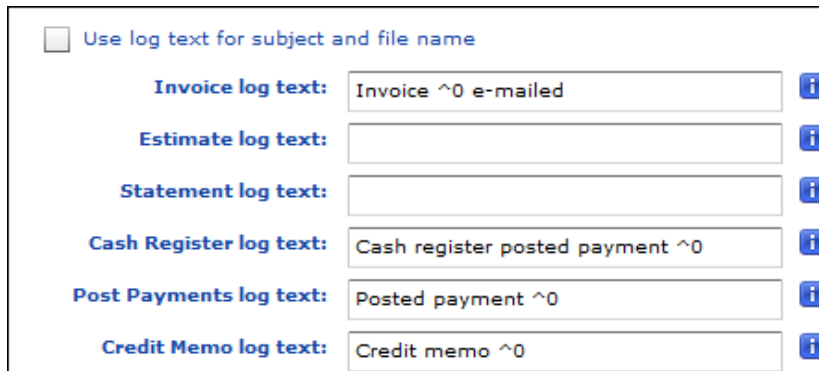
- To consolidate all the e-mail settings in one place, the **Enable E-Mail Settings** check box was moved from the Behavior preferences to the E-Mail preferences. (Ref. 16529)



- In the E-Mail preferences, additional place holder fields can now be included in the body of e-mails, for example, Contact First Name, Contact Last Name, and Salutation. (Ref. 16685,16820)
- If multiple contacts are available for estimates and invoices, you can select them from a list when previewing the e-mail before sending it. Addresses that you select are automatically separated with semi-colons. (Ref. 16820)



- You can now log e-mailed credit memos for journal entries if you enter text in **Credit Memo log text** field. (Ref. 16461,16820)



When a credit memo is e-mailed, it is then recorded on the **Log** tab in the account window using the text entered in the **Credit Memo log text** field.

	Date	Type	Comment
	6/16/2016 1:27 PM admin	EMAIL	Credit memo 1229
	3/11/2016 3:16 PM admin	EMAIL	Statement 26 e-mailed

Licensing for PrintSmith Vision E-Commerce API

PrintSmith Vision now includes licensing for an e-commerce API.

If you are an existing customer who uses this API, you must update your license to include **PrintSmith Vision Ecom API Activation** and then log out of PrintSmith Vision and log back in.

Additional Enhancements

- For your convenience, the Change Due date window (accessible from the Pending Documents window) now includes a **Firm wanted by date** check box. (Ref. 16723)

Change Due Date

Invoice: 1147 Posters
 (#7) ICON DESIGN GROUP INC

Wanted by: 6/22/2016 time Wed

Firm wanted by date

OK Cancel

- A **Lead Source** field was added to the Account Info window. The selections for this field come from the Lead Source table, which you can edit with Table Editor. (Ref. 16613)

The screenshot displays the 'Account Info' window with the following fields and values:

- Account Status:** Current
- Account Type:** Charge Account
- Taken by:** (empty text field)
- Sales Rep:** Mike (dropdown menu)
- Ship Via:** UPS Blue (dropdown menu)
- Hold:** (dropdown menu)
- Lead Source:** Direct Mail (dropdown menu, highlighted with a red box)
- PO #:** (empty text field)
- Resale #:** (empty text field)
- Expense Code:** (empty text field)
- Proofreader:** (empty text field)
- Special Instructions:** (empty text area)

- In dropdown fields (for example, **Product** and **Location** in the Job window), you can now type a character to get to the first selection beginning with that character and then type the character again to get to the next matching selection, etc. (This applies only to dropdown fields that are not editable.) (Ref. 16634)
- Receipts for payments made in the Post Payments window now include the payment method and invoice number. (Ref. 16089)
- When you are integrated with USAePay, the receipt produced by USAePay for a credit card payment now includes the invoice number and description. (Ref. 16624)

Corrections

The sections that follow describe the corrections that were made in PrintSmith Vision version 3.4. For your convenience they are categorized.

General

- If PrintSmith Vision is using SSL and a user is inactive for 10 minutes, only that user is logged out automatically, not all users. (Ref. 16522)

Localization

- In the Digital Definitions window, for English AU and English UK, **Copies per Original** in the **Method** field is now displayed correctly. (Ref. 16552)

EFI-Hosted Installations

- When PrintSmith Vision is EFI-hosted, you are now prevented from creating a job without a **Pricing Copier** selected. (This was resulting in the sales total not being associated with any sales category.) (Ref. 16587)

Charges

- When setting up a price list for a price list charge definition, the columns are now correctly labeled. (Ref. 4118)

Stocks

- If you select the **Disable FSC Options** check box in the Paper Calculator, the stock name no longer includes FSC information, for example, in the job ticket and invoices. (Ref. 2960, 15345)
- If subjobs in a multi-part job use inventoried stock and you delete such subjobs, the stock inventory levels are now adjusted accordingly. (Ref. 16776)
- When importing stock you now have more control over the stock groups to which imported stocks are assigned. By default, column E of the stock import file includes a single uppercase letter corresponding to a stock group, e.g., S= sheet, R = roll. If you want to use a different character for a stock group, you can now edit the Stock Group table and enter a different uppercase letter in the **Key (Alpha)** column for a particular stock group. During a stock import, if the character in column E of the import file matches a value in the **Key (Alpha)** column in the Stock Group table, the stock is assigned to that stock group. Otherwise, the stock import works as before and the standard S, R, E, C, O values are used to assign stocks to stock groups. (Ref. 15875)
- When Tracker or the Fiery is tracking the consumption of inventoried stock, stock no longer gets re-committed if you open and save a job. (Ref. 16590)


Accounts

- A sub-account always includes the master billing account number on the **Settings** tab. A master account can never be a prospect account. (Ref. 16551)
- If the **Lead Source** field is required for contacts (as specified in the Mandatory Field preferences), only one of the **Lead Source** fields on the **Marketing** tab in the Contact window needs to be completed. (Ref. 16796)
- When you select **Admin > System Monitor > Import Customers**, two new buttons are now available: **Update Customers** and **Update Prospects**. If you previously imported a customer/prospect you can use these buttons to update the customer/prospect information. For an account to be updated, the name in the import file (in column A) must *exactly* match the name in PrintSmith Vision. For example, if an external reference number (from column B of the import file) was appended to the name in

PrintSmith Vision as a result of the original import, you must manually change the name in the import file to match what is in PrintSmith Vision before trying to update accounts. (Ref. 15686)

Estimating

Invoices and estimates

- Web orders coming from API integrations are now identified with  in the Pending Documents window, and the Web reference number is also included. (Ref. 16284)
- Account sorting in the Pending Documents window now works correctly no matter what is selected in the **Document Type** field. (Ref. 16616)
- If the account for an invoice is missing some required information and the invoice does not include a job, the system no longer hangs when you try to open the invoice from the Pending Documents window. (Ref. 16503)
- If required information (as specified by the Mandatory Field preferences) is missing in the **Other Address** pane in the Account Info window, the invoice is no longer created until the missing information is entered. (Ref. 16498)
- In some situations, if an account had a single default contact, and you edited the contact in the Account Info window creating a temporary contact, the default contact was deleted. This was fixed. (Ref. 16528)
- If the invoice contact for an account is moved to another account, you no longer get an error when you edit the contact (in the Account Info window) and then try to save an invoice that originally had that contact. (Ref. 16817)
- If you create and save an invoice, and then make any changes to the account (e.g., to the address), these changes are no longer applied to the invoice (in the Account Info window). (Ref. 16519)
- If an invoice includes multi-part jobs, and you delete the subjobs and then the main job, an error no longer occurs when you try to save the invoice. (Ref. 16917)
- If the walk-in account has a **Default Invoice** or **Default Estimate** format defined, that format is now automatically set in the Invoice or Estimate window. The default invoice format is also selected if you convert an estimate for the walk-in account to an invoice or copy the estimate to a new invoice. (Ref. 16897, 16939)
- If **Show phone number** and **Show FAX number** are selected in the Document Preferences (on the **Header** tab), that information is now included on invoices. (Ref. 16931)
- A correction was made to all the default invoice and estimate reports to prevent a "continued on page 2" message when there was no page 2. (Ref. 16550)

Note Since the way you customize invoices and estimates is to base them on the pre-defined report (.rpt) files supplied by EFI, if you customized documents (for example, added your logo) in an earlier version of PrintSmith Vision, your customized documents will not include the correction made in version 3.4; the correction is just in the new EFI-supplied report files. If you have custom documents, you must re-create your documents using the new EFI ones as the basis for your custom documents.

- When you open the Document Totals window for an invoice that is not on the pending list, the invoice totals are no longer calculated (to prevent problems with tax codes). (Ref. 16913)
- When you use **Admin > Clear Estimates** or click **Archive** in the Pending Documents window, only estimates are now processed. (Ref. 16875)
- A delivery ticket is no longer created if any required address fields (as specified in the Mandatory Field preferences) are missing. (Ref. 16499)
- When you e-mail a delivery ticket, all the items on the delivery ticket are now included in the e-mail. (Ref. 16187)

Jobs

- Performance was improved when pricing is calculated for a multi-part job with a large number of subjobs. *To take advantage of this feature, contact EFI Support, who will turn it on for you.* (Ref. 16782)
- When a job is based on a digital definition and copies per minute, the labels in different windows now consistently indicate minutes versus hours. (Ref. 15421)
- When a large format job is based on the total of square area method, the stock markup is now calculated. (Ref. 17017)
- When you edit a list-based job, the **Change** button next to the **Schedule** field now works. (Ref. 14990)
- When an invoice is picked up and locked, you can still preview the digital assets for jobs in the invoice (but you cannot add or remove digital assets). (Ref. 16610)
- If a document includes a shipping charge, you change the **Ship Via** method, open a job in the document with the same shipping charge, **Ship Via** is now automatically set the same way as in the document. (Ref. 16397)
- The **Finish Qty Press** amount is now correct in the job ticket. (Ref. 16924)

POS

- For tax to be included on a receipt for a POS transaction, all elements of the tax must have the **Show** check box selected in the tax table. (Ref. 16640)

Accounting

- You can now pick up multiple invoices at a time for the walk-in account. (Ref. 16273)
- When posting payments you can now open an invoice and print or e-mail it. (You no longer get a message that the invoice is locked.) (Ref. 15447)
- When the Post Payments window includes many invoices, and you search for an invoice, if an **Amount** was entered, the invoice is selected with the **Pay** field updated based on the amount in the **Remainder** field. If an **Amount** was not entered, the invoice is just selected. (Ref. 16537)
- When you search for an invoice in the Post Payments window by entering a number in the **Search Invoice #** field, the invoice is now selected in the list. (Ref. 16201)
- The MYOB accounting links export file no longer includes an unnecessary blank line, which prevented the data from being imported into MYOB. (Ref. 16398)
- Sometimes duplicate closeouts were occurring due to corrupt data in the database. Now when you either log into PrintSmith or start a daily or monthly closeout, the system will fix any corrupt data. (Ref. 16560)
- When balancing the cash drawer during a closeout, the Change Item window is now displayed in the middle of the workspace. (Ref. 6246)
- The statement address for master accounts in the default statement forms is now correct. (Ref. 16783)

Dashboard

- If you void journal entries, the journal entry figures in the Dashboard are now updated. Previously, voided journal entries were not being removed. (Ref. 16738)

Reports

Account History

- If you apply a payment to an account and then later use that payment to pay off invoices, the reference number for the original payment is now shown in account history. (Ref. 15394)
-

Customer List

- If the **Report Type** for a Customer List report is set to **Address List**, the report now includes complete invoice and statement contact details. (Ref. 5968)5

Work in Progress

- Comments for jobs are now consistently included in the Work in Progress report. (Ref. 16737)

Report Manager

- When a report is selected in the left pane in Report Manager, the field on the right now includes more information about it. (This does not apply to all custom reports.) (Ref. 9604)

Note New installations of PrintSmith Vision (including upgrades from PrintSmith Classic) will not have this information in Report Manager. Please contact EFI Support for help.

- Two reports (Account Aging Detail and Account Aging Summary) were removed from the **Accounts** category in the Report Manager window because they are never used for printing reports. (Ref. 16561)
- You can now export reports with dates/times from Report Manager without an error occurring. (Ref. 16657)

Administration

E-Mails

- When **Enable E-Mail Settings** is not selected in the E-Mail preferences, e-mail functionality is not available elsewhere in the system. (Ref. 16485)
- If **SMTP Port** is set to **587** in the E-Mail preferences, the **Enable TLS Connection** check box is selected, and the **Enable SLL Socket** check box is cleared, but when you click **Check Connection** you get an error message about the connection failing due to "Could not convert to TLS," you can now select the new **Trust SMTP Host** check box to correct this problem. (Ref. 16105)
- The **Use log text for subject and file name** check box in the E-Mail preferences is now only available if some text was entered in the log text fields below. (Ref. 16501)
- A name in an e-mail address can now include ' (single quote), for example, James.O'Toole@mycompany.com. (Ref. 16626)
- Sometimes e-mailing an invoice resulted in an error. This was fixed. (Ref. 16662)

Preferences

- The **Hide tax in line items** setting in the Receipt preferences now works. (Previously selecting this preference had no effect.) (Ref. 7521)

Scheduler

- A long job description in the Tasks for Job window is now shown in a single line. If you move over a description, the full description is displayed in a tooltip. (Ref. 15272)
 - If a job has a due date of the same day, and a time is not specified, it now defaults to 11:59:59 PM to prevent the job from being immediately late in Scheduler. (Ref. 16574, 16867)
 - If you release the tasks in an invoice to Scheduler and then change the due date/time in the invoice, that change is now reflected in Scheduler. (Ref. 13664, 16579)
-

Tracker

- To help you find particular jobs, you can now highlight any item in the Tracker Console list and start typing an invoice number. The system will try to find a matching item in the **Item** column and highlight the item if it finds it. (Ref. 16133)
- You cannot delete an employee if the employee has any active jobs (or charges) running in Tracker. (Ref. 16622)
- If an employee is allowed to view jobs not released to production (the **Hide items not released to production** check box is cleared in the employee's profile), the unreleased jobs are now displayed in Tracker. (Ref. 15502)
- Orders resulting from integrations like Digital StoreFront or Four51 now are reflected in Tracker. (Ref. 16885)

Fiery Integration

- When a Digital StoreFront job is submitted to a Fiery from the Work in Progress window, an unnecessary warning about the file format is longer displayed when a PDF file is attached to the job. (Ref. 16475)
- If you select a Fiery device for a job that is different from the one associated with the digital press you are using, the Work in Progress report now shows the correct **Device ID**. (Ref. 16930)
- If a Fiery device is deleted, the **Submit/Void** button is no longer available in the Job window. (Ref. 16476)

Digital StoreFront Integration

- When an order comes in from Digital StoreFront, the invoice format no longer defaults to Default CreditMemo. The system first checks the account for a default invoice format. If no default is set for the account, the system uses the default invoice format specified in the Estimator Printing preferences. (Ref. 16553)
- Special instructions entered in Digital StoreFront can now be included in Job Ticket Notes in PrintSmith (by being copied from the Web worksheet). (This applies only to the new eFlow-based integration.) (Ref. 16892)
- If the invoice total for a non-credit card order changes in PrintSmith Vision, that information is now sent to Digital StoreFront. (This applies only to the new eFlow-based integration.)

SugarCRM Integration

- If a contact is disassociated from an account in SugarCRM, this is handled as follows in PrintSmith Vision: (1) If the contact is a single contact for an account, the account name is used as the name for contact 2. (2) If the account includes two contacts, and the first contact was disassociated, the second contact becomes the default contact 3. (3) If the account includes three contacts (with contact 1 being the default invoice contact and contact 3 being the default statement contact), and the first contact was disassociated, contact 3 will become default invoice contact. In all cases, if an invoice includes a disassociated contact it becomes a temporary contact. (Ref. 16769)

Four51 Integration

- If a Four51 product has pricing set to 0 and it is mapped to a PrintSmith Vision product, the pricing for the order in PrintSmith Vision is not locked. If a mapped product has pricing defined in Four51, the pricing in PrintSmith Vision is locked. (Ref. 16562)

PrintSmith Site Integration

- If you add a new product on the **Products** tab in the Web Administration window and then click **New**, the first product is automatically saved. (Ref. 15980)
-

- If you create a product in the Web Administration window, assign a template to it, save the product (but leave the Web Administration window open), create and save a new invoice and job, and then change the template for the product in the Web Administration window, you no longer get a server processing error. (Ref. 16638)
- When you drag a job onto the **Products** tab in the Web Administration window, the job name is now truncated if it exceeds the character limit for product names. Previously, long names were preventing the product from being transmitted. (Ref. 16652)
- When a PrintSmith Site order comes into PrintSmith Vision, the job name now includes the product name (from PrintSmith Site) in brackets. (Ref. 14329)
- When an account includes a default invoice format, that is now selected in the invoice created for a Web order or RFQ from PrintSmith Site. (Ref. 16906)
- If you void a Web order, the information is sent to PrintSmith Site only if the order originated in PrintSmith Site. (Ref. 16663)

Upgrading PrintSmith Vision

About Upgrading

If you were already using an earlier version of PrintSmith Vision, but want to upgrade to version 3.4, you update your existing installation by running the 3.4 installer. *You must, however, be upgrading from PrintSmith Vision 3.2.1 or higher, not a pre-3.2.1 version.*

An upgrade requires a re-start of the server computer.

Important: Before You Begin the Upgrade

If you also plan to upgrade the operating system

If you plan to upgrade your operating system *as well as* PrintSmith Vision, be sure to follow these instructions:

- For upgrades to Windows 10, see “Windows 10 and existing PrintSmith Vision installations” on page 10
- For upgrades to Mac OS X 10.11 (El Capitan), *upgrade PrintSmith Vision first* and then follow the instructions in “Existing PrintSmith installations and upgrades to OS X 10.11” on page 11.

If you want to use an SSL connection

Support for SSL (Secure Sockets Layer) connections was introduced in PrintSmith Vision 2.3. SSL creates an encrypted connection between the PrintSmith Vision server and your users' browser, preventing eavesdropping and data tampering. When you use SSL, the URL to your server is prefaced by `https://` instead of `http://`.

Note To use SSL, you must purchase an SSL certificate from a certificate authority (CA) and then install and configure it (with the help of EFI Support). *The certificate must be compatible with Apache Tomcat version 7.*

A non-SSL connection (which is the default connection between PrintSmith Vision and users' browsers) is not encrypted. This means data transmitted to and from the server could in theory be seen by others.

Important Even if you use non-SSL, credit card information is never at risk. This information is never stored in PrintSmith Vision, and USA ePay ensures the security of the transmission of credit card information.

If you are unfamiliar with SSL and SSL certificates, EFI strongly recommends you use the default non-SSL connection.

Some organizations may have policies requiring SSL for all data exchange over the Internet, in which case they can take advantage of this new SSL functionality in PrintSmith Vision.

If you did not previously configure SSL, during the upgrade process, you will be given the choice of using a non-SSL (the default) or SSL connection. Keep in mind that an SSL connection:

- Requires the purchase and installation of an SSL certificate. The certificate must be purchased from a Certificate Authority (CA) and be compatible with Apache Tomcat v. 7.
- Requires the help of PrintSmith Support to install and configure the signed certificate you purchased.
- Changes the PrintSmith Vision URL: the URL begins with `https://` and uses port 8443 by default.

Upgrade Your System

Warning You must have PrintSmith Vision 3.2.1 or higher installed before you can upgrade to 3.4.

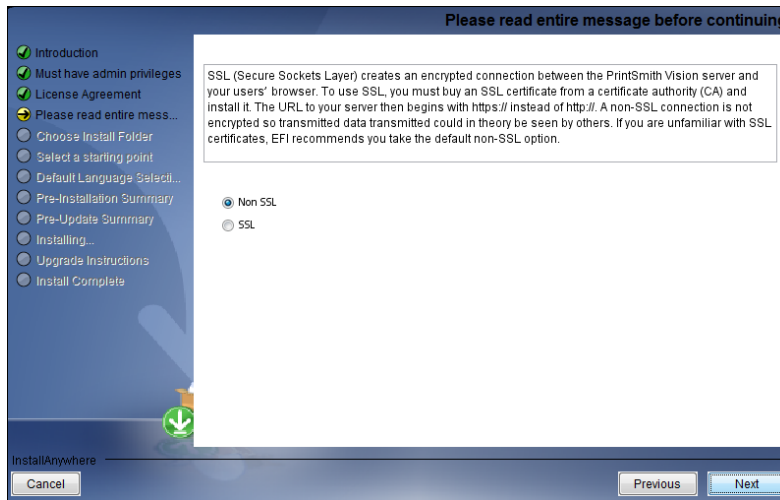
1. Back up your entire system as described in the section on “Backup Manager preferences” in the *PrintSmith Vision - Setup and User Guide*.
2. Obtain the PrintSmith Vision Server 3.4 installer.

Caution Before you start the installer, close PrintSmith Vision Monitor, pgAdmin, and any PrintSmith Vision installation folders that are open.

3. Start the installer.
4. After you accept the license agreement and read some warnings about performing backups and closing all PrintSmith applications, if you are given this option, select **Non SSL** (the default) or **SSL**. For more information about this choice, see “If you want to use an SSL connection” on page 39.

Notes If you selected **SSL** in a previous release of PrintSmith Vision, you will not be given the choice to select **Non SSL** or **SSL**.

If you select **SSL**, you must install and configure your SSL certificate after you upgrade PrintSmith Vision. Contact PrintSmith Support for help with this.



5. Follow the remaining instructions to complete the upgrade. A re-start of the computer is required at the end of the upgrade.

After the Upgrade

To ensure you are seeing all the latest changes to the user interface, clear your browser cache after upgrading PrintSmith Vision. 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.