



## Release Notes

PrintSmith Vision  
Version 2.3.1  
December / 2014

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EFI PrintSmith Vision | *Release Notes*

December 2014 PrintSmith Vision 2.3.1

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## About this Document

This document describes the enhancements and corrections that were made in PrintSmith™ Vision 2.3.1.

## Contact Information

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

### 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

#### North America

[Printsmith.service@efi.com](mailto:Printsmith.service@efi.com)

#### EMEA

[Europe\\_support@efi.com](mailto:Europe_support@efi.com)

## Important Information – Read This!

### Do You Meet System Requirements?

Be sure you meet the system requirements listed on page 8.

### 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 8.1.25 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 33 of the *PrintSmith Vision Installation and Upgrade Guide*.

**Warnings** As of PrintSmith Vision 2.1.9, the Postgres database is 64-bit. Because of this change to the database, when you update to PrintSmith Vision 2.3.1, you must be at version 2.1.9 or higher. You cannot update from a pre-2.1.9 version of PrintSmith Vision.

In PrintSmith Vision version 2.2.1, performance and architectural improvements were made. If you did not install 2.2.1 and are updating from 2.1.9 to 2.3.1 or from 2.2 to 2.3.1, the update *will take significant time*, especially for large databases.

Be aware that i-net Designer 9.1 is no longer supported – see below.

### Before you start the update

- Back up the PrintSmith Vision database (and Scheduler database if you use Scheduler); the InvoiceRepository and ReportRepository folders that contain custom documents and reports; and the DigitalAssetsRepository folder that contains all the content files that were uploaded for jobs. 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.

## i-net Designer v 9.1 Is No Longer Supported

If you are updating PrintSmith Vision from 2.1.9, and did not yet convert your custom documents and reports to i-net Designer 12.1, do so before updating to PrintSmith Vision version 2.3.1. As of PrintSmith Vision 2.2, i-net Designer v. 9.1 is no longer supported so custom documents and reports based on that version *will not run*. For now, the 9.1 report repository folder is still installed, however.

For instructions about converting custom documents and reports, see Appendix C in the *PrintSmith Vision 2.1.9 Setup and User Guide*.

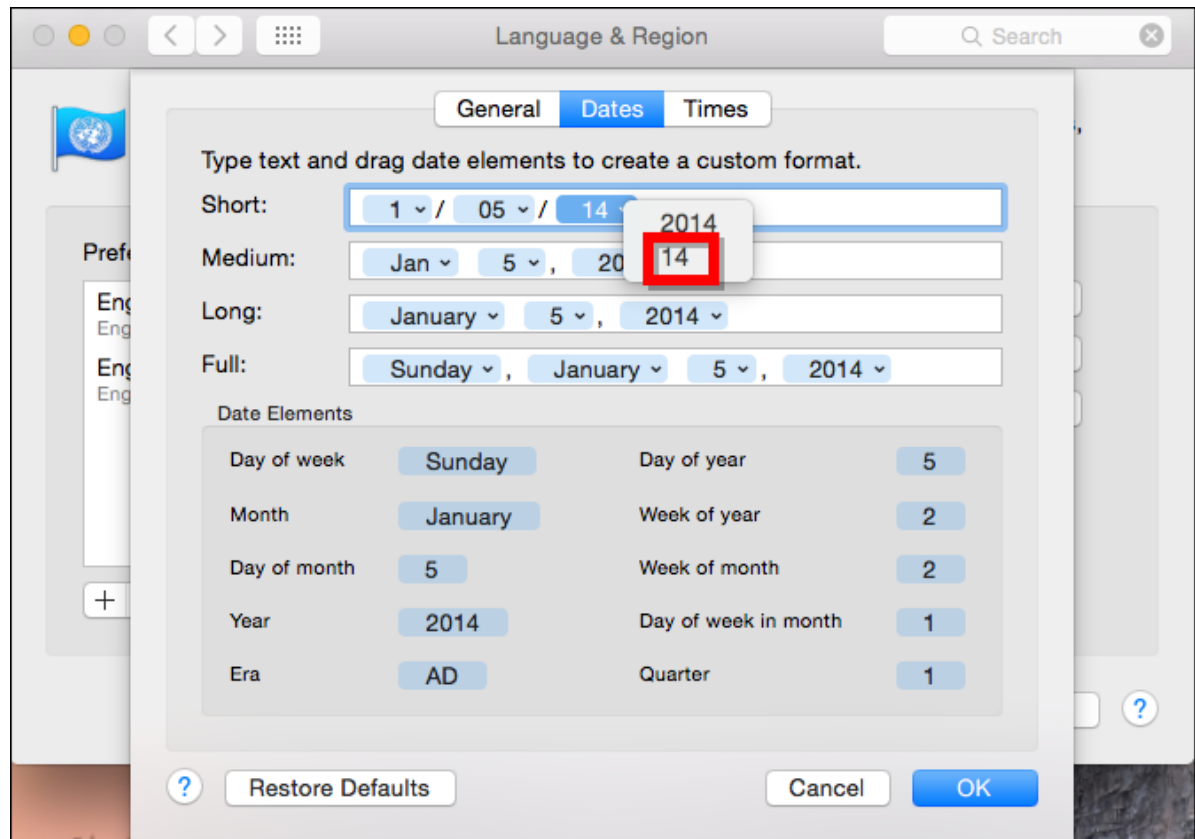
## Known Issues

### Digital StoreFront integrations

When an EFI VDP powered by DirectSmile® product (including direct mail products) is ordered on the site, print specifications are not being sent to PrintSmith Vision. As a result, the Web worksheet in PrintSmith Vision does not include any print specifications. This will be fixed in a future release of Digital StoreFront.

### 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., 14) format for the **Short** date in System Preferences.



## Target pricing issue

If the press used for a job has target pricing associated with it, and you change the pricing press, the original target pricing continues to be used so the job price is incorrect.

# System Requirements

## Overview

The computer where PrintSmith Vision and its database are installed is known as the *server*. PrintSmith Vision is then accessed by users through a browser on Windows or Macintosh computers. These computers are also known as *clients*.

This section describes the technical requirements you must meet for the PrintSmith Vision server (see below) and for the client computers (see page 9).

In addition, to run PrintSmith Vision, you must meet some miscellaneous requirements such as browser version and monitor size and resolution.

**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 virtual machine or 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.

### Windows 64-bit

<i>Operating system:</i>	Windows 7 Windows 8 Windows Server 2008 R2 Standard Windows Server 2012 R2 Standard or Essentials**
<i>Processor:</i>	Intel Quad Core i7 2.3 GHz
<i>Memory:</i>	16 GB
<i>Hard drive:</i>	50 GB free space

\*\* If you use Internet Explorer 11 on Windows Server 2012, some additional configuration may be required. See the section on “Windows Server 2012 and Internet Explorer 11” in the *PrintSmith Vision Installation and Upgrade Guide*.

### Macintosh

<i>Operating system:</i>	OS X 10.8, 10.8 Server, 10.9, 10.9 Server, or 10.10 (Yosemite) **
<i>Processor:</i>	Intel Quad Core i7 2.3 GHz
<i>Memory:</i>	16 GB
<i>Hard drive:</i>	50 GB free space

\*\* Only the standard client version of Mac 10.10 is supported (*not* 10.10 Server).

If you currently have a pre-2.3 version of PrintSmith Vision installed on a Mac, and want to upgrade your Mac to OS X 10.10, you must update PrintSmith Vision to 2.3 *before* you upgrade the operating system. After you upgrade the operating system, you must download and re-install Java. (When Apple upgrades the operating system, it removes Java, which is required to uninstall PrintSmith Vision and to install future versions of PrintSmith Vision.)

New Macs (10.9 and higher) do not have Java installed, which is required to install PrintSmith Vision. Download and install Java before starting the PrintSmith Vision Installer.



## Important Notes About the Server

- If PrintSmith Vision is going to be run from other computers (clients), the server computer should have a static IP address. This IP address is part of the URL users enter to run PrintSmith Vision; if the IP address keeps changing (because it is not static), the URL will also keep changing.
- In addition, the server computer must be configured not to go to sleep. If the server goes to sleep, users who are running PrintSmith Vision from other computers will get a “server down” message, and will be unable to use PrintSmith while the server is in sleep mode. On a Windows computer, turn off sleep mode in the **Power Options** settings in the Control Panel; on a Macintosh, turn off sleep mode in the **Energy Saver** settings.

## PrintSmith Vision Client Requirements

The requirements for running PrintSmith Vision on a client computer (one on which PrintSmith Vision is *not* installed) are:

<i>Operating system:</i>	Windows 7 Windows 8 Macintosh OS X 10.6 or higher
<i>Memory:</i>	4 GB
<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:

- Internet Explorer 9, 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 22.x or later
- Safari 6.05 or later
- Chrome 32 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 768

## 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 EFI Support team

## Custom Document and Report Requirements

PrintSmith Vision reports and other documents (such as estimates or invoices) are written in i-net Clear Reports.

If you want to customize your estimates or invoices (for example, include your logo) or if you plan to create custom reports, you must install i-net Designer, which is part of Clear Reports. You will be given the option of installing i-net Designer during the PrintSmith Vision server installation.

## Receipt Printer Requirements

A receipt printer is optional in PrintSmith Vision, but if you want to use one, you must purchase the Star TSP 700II printer *from EFI*.

For important information about configuring the receipt printer, see the *PrintSmith Vision Configuring Receipt Printers Guide*.

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## Enhancements

### Four51 Integration

PrintSmith Vision now offers integration with Four51 OrderCloud™ – an e-commerce solution for ordering print products.

PrintSmith Vision and Four51 work together. As orders are placed and paid for in Four51 OrderCloud, they are ready to be requested by PrintSmith Vision. After the orders come into PrintSmith Vision, the production workflow is then managed in PrintSmith Vision based on information included in the orders. The communication is one-way: information comes from Four51, but nothing is sent back to Four51 from PrintSmith Vision.

**Note** Four51 integration is an optional PrintSmith Vision module that requires separate licensing.

For information about setting up and using Four51 with PrintSmith Vision, see the *PrintSmith Vision and Four51 Integration Guide*.

### Ability to Use PrintSmith Classic Approach to Pricing Updates

PrintSmith Vision and PrintSmith Classic handle pricing updates differently.

In PrintSmith Vision, the latest pricing is always used when you open an existing document – this information is pulled in from your pricing definitions.

In PrintSmith Classic, the pricing details are stored as part of the jobs that make up your documents, and do not get updated unless you explicitly recalculate the document (or make certain kinds of changes such as selecting a different stock or press). For example, if you create an invoice for a printing job, and then later change the press definition and re-open the invoice, the original pricing details are retained. If, however, you open the Document Totals window and click **Recalculate**, the pricing is updated based on the changes made to the press definition.

Starting with PrintSmith Vision 2.3.1, you can choose how pricing updates are handled.

EFI recommends that you use the PrintSmith Vision approach to pricing because it guarantees your documents are always based on the latest pricing you have defined. If, however, you prefer the approach used in PrintSmith Classic, you can switch to that method as described on the next page.

**Important** If you are an existing PrintSmith Vision user who likes the way pricing updates are handled, *no action is required*. PrintSmith Vision will continue to work as it has.

### ***To switch to the PrintSmith Classic approach for updating pricing***

Two steps are required to switch the way pricing is handled: you must set a system behavior preference and you must import some data that was exported from PrintSmith Classic but not previously imported into PrintSmith Vision.

#### **Set the system behavior preference**

1. Click **Preferences** in the QuickAccess panel. The system behavior preferences are automatically displayed.
2. Select the **When possible, maintain original pricing for documents** check box.
3. Click **Save**. You will be warned that changing this setting affects how all pricing updates are handled in your system.

The screenshot shows the 'Behavior' preferences window in PrintSmith Vision. The window has a title bar with the word 'Behavior' in blue. Below the title bar is a list of checkboxes for various system behaviors. The checkbox 'When possible, maintain original pricing for documents' is highlighted with a red rectangle. Other checkboxes include 'Eliminate some warning messages', 'Only post invoices marked ready', 'Enable E-Mail Settings', 'Automatic Print Dialog for Reports', 'Activate user event logging', 'Enable automatic log out', 'Show invoices with firm due date of "today" at login', 'Import Account History', and 'Enable automatic quit'. Below the checkboxes is a section for 'Time of day to quit' with a time picker set to '0 : 00 pm'. At the bottom, there is a 'Shut down notification message' section with a warning message: 'Warning: PrintSmith is automatically shutting down at ^0. This is your only warning. Please finish up and quit now.'

#### **Import the historical job and charge data you exported from PrintSmith Classic**

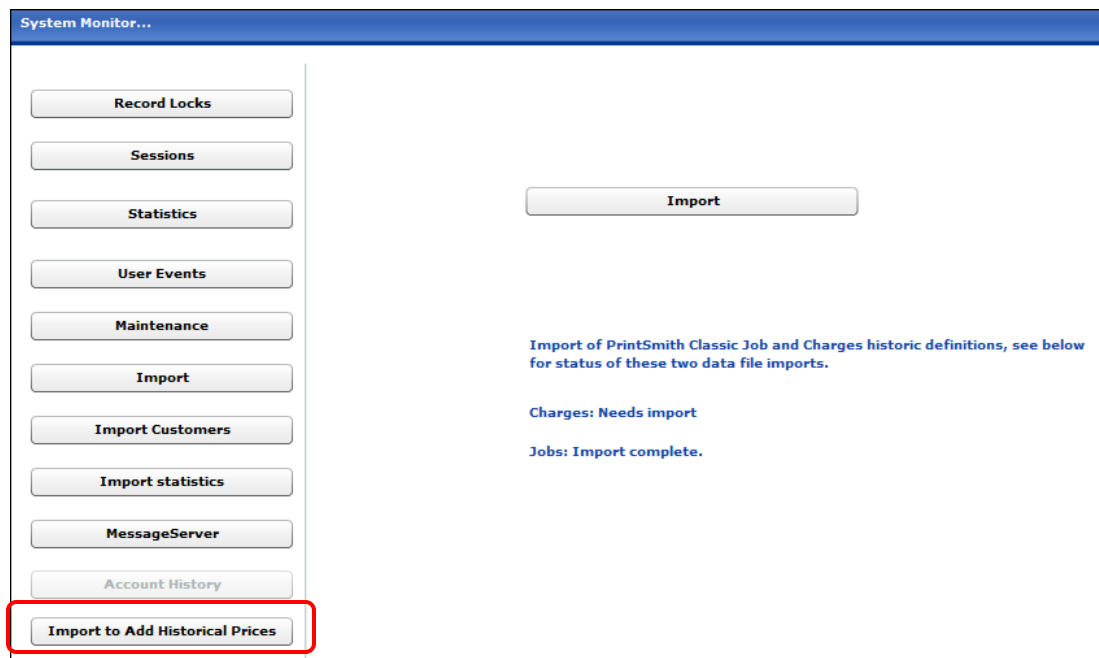
When you exported your data from PrintSmith Classic, it included job and charge details as part of your documents. These details now need to be separately imported. The procedure is different if you are new to PrintSmith Vision as of version 2.3.1 or are an existing PrintSmith Vision user.

**Warning** The import of these additional details takes time, especially if you have many invoices. Plan the import accordingly.

### ***If you are new to PrintSmith Vision as of 2.3.1***

After you import your data into PrintSmith Vision as explained in the upgrade section of the *PrintSmith Vision Installation and Upgrade Guide*, do the following:

1. In PrintSmith Vision, select **Admin > System Monitor**.
2. Click **Import to Add Historical Prices**. (This button is available only if you selected the **When possible, maintain original pricing for documents** check box in the System Behavior preferences.)



**Tip** A message on the right side of the window indicates what you need to import.

3. Click **Import**, navigate to the folder that has your exported data, and select **DL Charges Data.TXT**.
4. After the import is done, re-start the PrintSmith Vision server. (This may take longer than usual.)

### ***If you are an existing PrintSmith Vision user***

1. Complete steps 1 and 2 as for “If you are new to PrintSmith Vision as of 2.3.1” above.
2. Click **Import**, navigate to the folder that has your exported data, and select **DL Charges Data.TXT** and **DL Job Data.TXT**.
3. After the import is done, re-start the PrintSmith Vision server. (This may take longer than usual.)

## Corrections

The sections that follow describe the corrections that were made in PrintSmith Vision version 2.3.1. For your convenience they are categorized.

### Imports

- When always ask charges are imported, the material cost is now also included. (Ref. 14343)

### Charge Definitions

- When a charge uses the unit cost method with a rate list, prices are now calculated correctly. (Ref. 14345)

### Stock Definitions

- The weight of roll fed stock is now imported correctly. (Ref. 14417)

### List Price Schedules

- For pass list price schedules, the last two "over quantity" prices are now saved. (Ref. 14208)

### Accounts

- In the Account Picker window you can now use the arrow keys to move among accounts, use the Enter key to select the highlighted account, and use the Esc key to close the Account Picker window. (Ref. 14099)

## Estimating

### Invoices and Estimates

- In some situations, the invoice contact in the Account Info window was reverting to the default contact for the account. This was fixed. (Ref. 14312)
- The **Customer Comment** field in the Account Info window is now displayed only for Web orders with comments that originated in Digital StoreFront, PrintSmith Site, or Four51. (Ref. 14152)

### Jobs

- When you open an existing job, you no longer get asked about updating the pricing.
- When you use the **Multi-Quantity** command, the focus is now correctly on the **Quantity** field as you tab through the Job window. (Ref. 14287)

## POS

- When you delete a record from the register tape, the position of the scroll bar is now retained (you do not end up at the bottom of the tape). (Ref. 14226)

## Accounting

- When **Only master billing accounts** is selected, just the master billing account details are now included in the statement reports. (Ref. 13176)
  - The statement reports now include the correct information when **Selected Accounts** and **Only master billing accounts** are selected. (Ref. 13977)
-

- Accounts with negative balances in the range -0.001 to 0.10 are no longer omitted from the detailed statement report. (Ref. 14294)
- Accounts with no open items and a zero balance are no longer included in the summary statement report. (Ref. 13123)
- When **Skip accounts with current status is selected**, accounts are now correctly and consistently skipped in statements. (Ref. 13246)
- Statements are now printed correctly if **Skip accounts with current balance** is selected, and you do not preview the statements. (Ref. 13296)
- The status of a new account without a balance or open items now changes if **Ask before changing status** is selected on the **Accounting** tab in the Generate Statements window and you click **Yes** in the Aging Confirmation window. (Ref. 13971)

## Reports

### Work in Progress

- The Date and Time Work in Progress report now includes the time. To fit the report on a single page, take advantage of the **Print Options** introduced in version 2.3. (Ref. 14214)

### Estimate History

- Titles are now sorted correctly for the walk-in account. (Ref. 14358)

## Administration

### E-Mail Configuration

- Outlook and Hotmail accounts can be configured in the E-Mail preferences. For details see the *PrintSmith Vision Setup and User Guide*. (Ref. 14328)

### Stock Orders

- If you try to click the **Order Received** button for a stock order, and the stock definition was deleted, you now receive an explanatory message. (Ref. 14181)

## Scheduler

- Job descriptions can now be up to 1,000 characters long, preventing errors from occurring when tasks are scheduled. (Ref. 14284)

## Digital StoreFront Integration

- The **Deliver Where** tab in the Delivery Ticket window now shows the shipping address specified by the buyer when placing the order in Digital StoreFront. Previously, the address of the customer account was shown instead. (Ref. 13777, 14150)
- When a buyer who is not associated with a PrintSmith Vision contact places an order, the information provided by the buyer will result in a walk-in order (unless a different account is selected for the order in PrintSmith Vision). (Ref. 13943)
- Special instructions in a Digital StoreFront order can now be up to 2,000 characters long and delivery instructions can be up to 500 characters long. Previously, longer instructions were preventing an invoice from being created in PrintSmith Vision. (Ref. 14174)
- An error no longer occurs when an order comes into PrintSmith Vision for a multi-part job template. (Ref. 14425)

- The Web Worksheet window now supports text wrapping so longer items do not get cut off. (Ref. 14205)
- When **Document Type** in the Pending Documents window is set to **Web Orders**, the **Web Reference** filter now works correctly. (Previously, orders were not being found.) (Ref. 14267)
- The labels in the PrintSmith Vision Integration preferences now match the labels in Digital StoreFront on the MIS Systems page. (Ref. 13833)

## Fiery Integration

- PrintSmith stocks with dimensions in the name, e.g., A3, are now available for selection during media mapping. (Ref. 14290)
- The bleed and gutter in the JDF ticket are now converted to points (so are not being sent as inches). (Ref. 14308)

## PrintSmith Site Integration

- An error no longer occurs when an order comes into PrintSmith Vision for a multi-part job template. (Ref. 14425)
  - Web orders originating in PrintSmith Site are now identified by **(PSS)** in the **Web Reference** column in the Pending Documents window. (Ref. 13795)
  - The **Change Design** button is now available on the **Products** tab in the Web Administration window for XMPie products. (Ref. 14075)
-