



## Release Notes

PrintSmith Vision  
Version 2.4  
March / 2015

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EFI PrintSmith Vision | *Release Notes*

April 2015 PrintSmith Vision 2.4

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## About this Document

This document describes the enhancements and corrections that were made in PrintSmith™ Vision 2.4.

## 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.

**Important** Mac OS X 10.8 is no longer a supported operating system 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 8.1.26 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*.

**Warning** To update to PrintSmith Vision 2.4, you must be at version 2.3 or higher. You cannot update directly from an earlier version of PrintSmith Vision.

### 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	<a href="https://support.google.com/chrome/answer/95582?hl=en">https://support.google.com/chrome/answer/95582?hl=en</a>
Firefox	<a href="https://support.mozilla.org/en-US/kb/how-clear-firefox-cache">https://support.mozilla.org/en-US/kb/how-clear-firefox-cache</a>
Internet Explorer	<a href="http://windows.microsoft.com/en-in/windows7/how-to-delete-your-browsing-history-in-internet-explorer-9">http://windows.microsoft.com/en-in/windows7/how-to-delete-your-browsing-history-in-internet-explorer-9</a>
Safari	<a href="https://answers.syr.edu/display/software/Clear+Cache+in+Safari+version+7+on+Mac+OSX">https://answers.syr.edu/display/software/Clear+Cache+in+Safari+version+7+on+Mac+OSX</a>

**Important** Make sure all your users clear their browser cache, too.

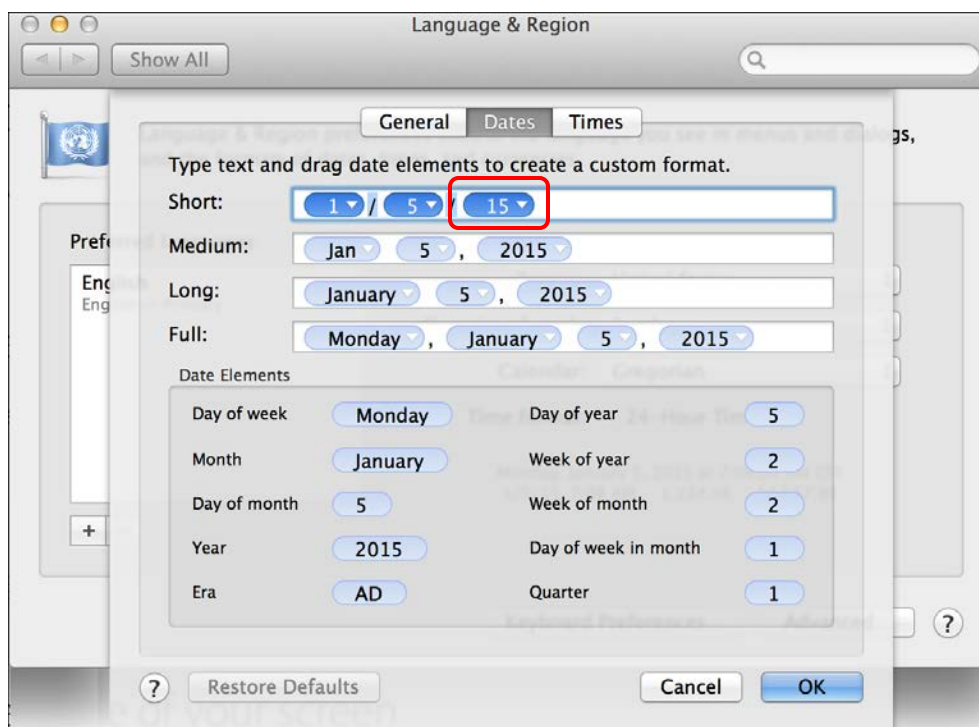
## Known Issues

### 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., 15) format for the **Short** date in System Preferences (**Date & Time > Open Language & Region > Advanced > Dates**).



# System Requirements

## Overview

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

This section describes the technical requirements you must meet for the PrintSmith Vision server (see below) and for the client computers (see page 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 10.9, 10.9 Server, 10.10, or 10.10 Server **
<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 currently have a pre-2.4 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 2.4 *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.)

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 10.8 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:

- 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 36.x or later
- Safari 7.x or later
- Chrome 41 or later

## Monitor and Resolution Requirements

PrintSmith Vision is designed to be viewed and used on a large monitor with high resolution:

- 19-inch monitor
- Minimum resolution of 1280 x 1024

**Important** If you are attaching an external monitor to a laptop, the resolution on the laptop monitor must also meet the minimum resolution requirements.

## 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 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*.

## Fiery Integrations

If you are using PrintSmith Vision with a Fiery®, Fiery JDF version 1.3.0.22 is required.

# Enhancements

## My Dashboard

The Dashboard provides a view of the status of orders taken by the logged in user, as well as orders for the entire shop.

**My Dashboard:admin**

Refresh

Shop	Previous Day		Current Day		Total orders		Sales	
	Estimates	Invoices	Estimates	Invoices	YTD	MTD Mar-15	YTD	MTD Mar-15
Shop	1,733.22 (3)	854.97 (2)	1,236.60 (2)	664.09 (3)	5,338.20	4,613.25	23,912.59	1,682.94
admin	583.02 (1)	702.00 (1)	1,053.00 (1)	383.42 (2)	3,443.74	3,203.66	0.00	1,682.94

**Due Today (464.27)**

Invoice #	Customer	Total
1203	Salt River Project	323.08
1190	JAY E FISHMAN MD	80.85
1202	Buzz Coffee	60.34

**Overdue (5,331.55)**

Invoice #	Customer	Due Today
1168	BP OIL	Tue Jul 29 2014
1170	EFI	Tue Jul 29 2014
1169	Anna's Designs	Fri Aug 1 2014
1173	Cactus Printino	Fri Aug 1 2014
1174	Cactus Printino	Mon Aug 4 2014

**On Proof (540.00)**

Invoice #	Customer	Item#
1174	Cactus Printino	1

Pending Estimates (2,633.59) Customer Log

Estimate #	Customer	Description	Total	Created Date	Convert
91	Anna's Designs	Lined pads	70.47	Wed Feb 11 2015	Open
89	Anna's Designs	Booklet	611.53	Thu Feb 26 2015	Open
94	JAY E FISHMAN MD	Flyer	129.73	Fri Feb 27 2015	Open
96	ORGANIC EXPRESS INC	Yellow copies	30.94	Tue Mar 3 2015	Open
104	JETRION	Tradeshaw packages	1,053.00	Tue Mar 10 2015	Open

You can open the Dashboard directly from the QuickAccess panel or you can select **Help > My Dashboard**.

**Note** Security permissions control which users can open the Dashboard, what information they can see, and what they can do on the Dashboard.

The Dashboard includes:

- Estimate and invoice totals for the previous day and current day.
- Year to date and month to date totals of orders and sales.
- Lists of invoices due today, overdue, and on proof.
- A list of estimates still in a pending state, with the ability to open them and then convert them to invoices so you can go ahead and produce the job and bill the customer.

Pending Estimates (2,633.59) Customer Log					
Estimate #	Customer	Description	Total	Created Date	Convert
91	Anna's Designs	Lined pads	70.47	Wed Feb 11 2015	Open
89	Anna's Designs	Booklet	611.53	Thu Feb 26 2015	Open
94	JAY E FISHMAN MD	Flyer	129.73	Fri Feb 27 2015	Open
96	ORGANIC EXPRESS INC	Yellow copies	30.94	Tue Mar 3 2015	Open
104	JETRION	Tradeshaw packages	1,053.00	Tue Mar 10 2015	Open

- A log of the communication that you have had with customers, with the ability to follow up on issues. Any entry that you logged with a follow-up date of today or in the past is listed in the Dashboard.

Pending Estimates (997.57)		Customer Log	
Date	Type	Customer	Comment / Follow-up comment
Thu Feb 12 2015	CALL	Anna's Designs	(Notified) Called Victoria again but couldn't reach / Concerning status
Tue Feb 17 2015	ESTIMATE	Anna's Designs	Estimate feedback indicated they still haven't decided on the job
Tue Feb 17 2015	CALL	Cactus Printing	(Notified) Called to find out if decision made on job - not yet / Check estimate status
Thu Mar 5 2015	CALL	NEON DESIGNS	(Notified) Called to notify of delay / Inform when job is done

**Tip** As of PrintSmith Vision 2.4 you can now log customer issues in many places (not just on the **Log** tab in the Customer window, or by clicking **Notify** in the Pending Documents window). The following windows now have a **Notify** button that you can click to log an issue: Contact, Work in Progress, Customer History, Post Payments, and Journal Entry.

You can open any log entry listed on the Dashboard and edit it or indicate it was resolved (completed).

Customer

Cactus Printing

Attn: Jane Smith

Phone: 111-111-1111

Fax:

Mobile: 333-333-3333

Other:

E-mail: jsmith@cactusprinting.com

Invoice/Estimate

Estimate: 90 Printing

Attn: Jane Smith

Phone: 111-111-1111

Fax:

Mobile: 333-333-3333

Other:

E-mail: jsmith@cactusprinting.com

PO #:

Type

CALL

Add to customer account log:

(Notified) Called to find out if decision made on job - not yet

☒ Follow-up required

Follow-up date

2/17/2015

Follow-up by

admin

Follow-up comment

Check estimate status

☒ Completed

Date Completed

3/5/2015

Completed by

admin

Action taken

Customer accepted the estimate.

OK

Cancel

**Tip** The **Log** tab in the Customer window is another place you can now indicate a log entry was resolved and completed.

For details of the Dashboard, as well as the enhancements to the customer logging process (in the Notify Customer window), see the *PrintSmith Vision Setup and User Guide*.

## Purchase Orders

You can now create and manage purchase orders in PrintSmith Vision. Purchase orders can be created for stock, charges, jobs, and invoices. You can also create generic purchase orders for other types of items, for example, toner or ink that you like to keep in stock.

New PO Settings preferences let you control what types of purchase orders can be created and security permissions let you control who can create and manage purchase orders.

Besides setting preferences and security permissions, you must complete some additional setup tasks before you can start creating purchase orders. For example, you must define your suppliers (**Admin > Purchase Orders > Suppliers**), as well as edit some supplier-related tables with Table Editor.

**Supplier #2 Omega Best Inks**

Previous Next New Save Get Revert Delete

ID 2

Name Omega Best Inks 3/10/2015

Address Misc Supply Type

**Address**

Company Omega Best Inks

Street 100 Best Way

City Lebanon

State NH

Zip 03766

Country USA

Phone 666-666-6666

FAX 666-666-6667

E-Mail Roger.Smith@obi.com

**Contact**

	First	Last	Salution	Phone
Main Contact	Roger	Smith		666-666-6668
Sales Contact	Maggie	Alexander		666-666-6669
Account Contact	Luisa	Rubio		666-666-6665
Other Contact				

When you are in an area of PrintSmith Vision where purchase orders can be created (Stock Definitions, Invoice, or Job window), you click **Purchase Order** on the toolbar to create a purchase order for the type of item you have open.

**Stock Definitions...**

Previous Next New Save Get Duplicate Revert Delete Price List **Purchase Order (0)**

Group Paper

Name NCR Premium Black -Cut (C

Color Pink

Generic Color Pink

Class CF

Finish

Grade

Weight 20.0000

Coated

Envelope

☒ Sheet Stock

☐ Roll Stock




☐ Large Format

☐ Rigid Substrate

Last Updated 1/21/2007 12:00 AM

For charges, a **Purchase Order** button is available at the bottom of the **Charges** pane in the Job window when a charge is selected:

Charges	
Paper plates	13.00
Black ink	1.00
Standard PMS Ink	12.50
Complex envelope d	30.00

Purchase Order (0)   

**Tip** If you do not want purchase orders to be created for particular charges, you can select the new **Do not allow purchase order** check box in the Charge Definitions window.

For generic purchase orders, you can click **Generate Blank PO** in the QuickAccess panel or select **Admin > Purchase Orders > Generate Blank PO**.

For each purchase order you select a supplier, select the date you want the item or service, and provide information about the buyer:

Purchase Order \*\* new \*\*

Supplier: Fancy Papers Change Supplier... Date Required: 3/19/2015 time

Buyer: Maria Michaels Phone: 333-333-3333 E-mail: MMichaels@SuperPrints.com

Additional text to appear on purchase order: Different paper vendor would be OK

Item#	Item Name	Supplier Quote#	Qty	Unit Price	Type	Description
1	NCR Premium Bl		1,000.00	0.0291	Stock	8.5 x 11 Pink 20

Save Print E-mail Cancel

☐ Complete All

You can also provide additional information about line items if necessary. (Except in generic purchase orders, details for line items come from the stock, invoice, job, or charge.) For example, you may want to provide an *item code*, which is typically the reference number the supplier uses for the item (such as a stock or ink reference number). Also, a line item description is important for providing details of what you are ordering.

The screenshot shows a dialog box titled "Purchase Order Line Item - Item#1". It contains the following fields and controls:

- Item#**: Text box with value "1".
- Supplier Quote#**: Empty text box.
- Account**: Text box with a "Change Account..." button next to it.
- Total Quantity**: Text box with value "1,000.00".
- Unit Price**: Text box with value "0.0291".
- Type**: Dropdown menu with "Stock" selected.
- Item Code**: Text box with value "0239-0102K".
- Item Name**: Text box with value "NCR Premium Black -C".
- Partial Received**: Text box with value "0.00".
- Complete**: A checkbox that is currently unchecked.
- Line Item Description**: Text box with value "8.5 x 11 Pink 20.00 NCR Premium Black -Cut (CF)".
- Additional Description**: Empty text box.
- Buttons**: "OK" and "Cancel" buttons at the bottom.

Once a purchase order is created, you can print it or e-mail it to the supplier.

You can also do the following with purchase orders:

- Customize the way your purchase orders look, for example, add your logo.
- Edit purchase orders, for example, enter a reference number from the supplier, record a partially received item, or indicate that an item or the entire purchase order is complete. (Until a purchase order is complete it is considered *active*.)
- Add items to active purchase orders.
- Check the purchase order history for a supplier.

For more information about creating and managing purchase orders, see the "Purchase Orders" chapter in the *PrintSmith Vision Setup and User Guide*.

## E-Mail Enhancements

Numerous enhancements were made to e-mail functionality in PrintSmith Vision:

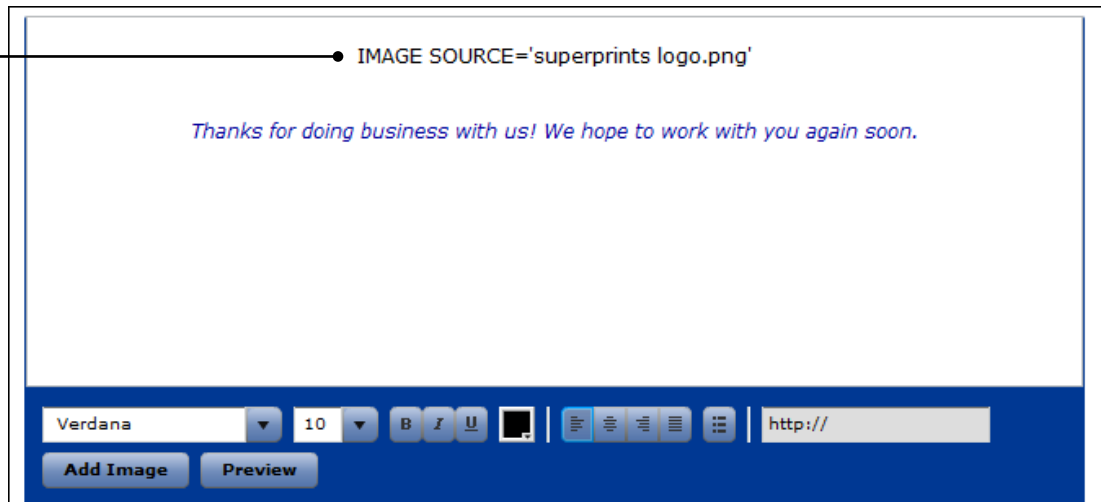
- You can e-mail purchase orders (see above) in addition to estimates and invoices.
- A new Estimator Behavior preference lets you control whether the Invoice or Estimate window closes automatically after you e-mail the invoice or estimate.



- In the e-mail preferences, you can now configure e-mail for an Outlook Microsoft Exchange server account. For information, see the *PrintSmith Vision Setup and User Guide*.
- The User Definitions window now includes both an **E-Mail** and **E-Mail Password** field for providing SMTP account information. When a user definition has this information included, documents e-mailed from PrintSmith Vision by the user are sent from this account.
- When providing the default text for the e-mail body, you can format the text (e.g., change the font, style, or alignment); add images (e.g., a logo); and include hyperlinks to sites. You can also preview the body to make sure it looks the way you want.

**Notes** Any text you enter should be generic since the same text is used when you e-mail estimates, invoices, and purchase orders.  
To see an image you added, click **Preview**.

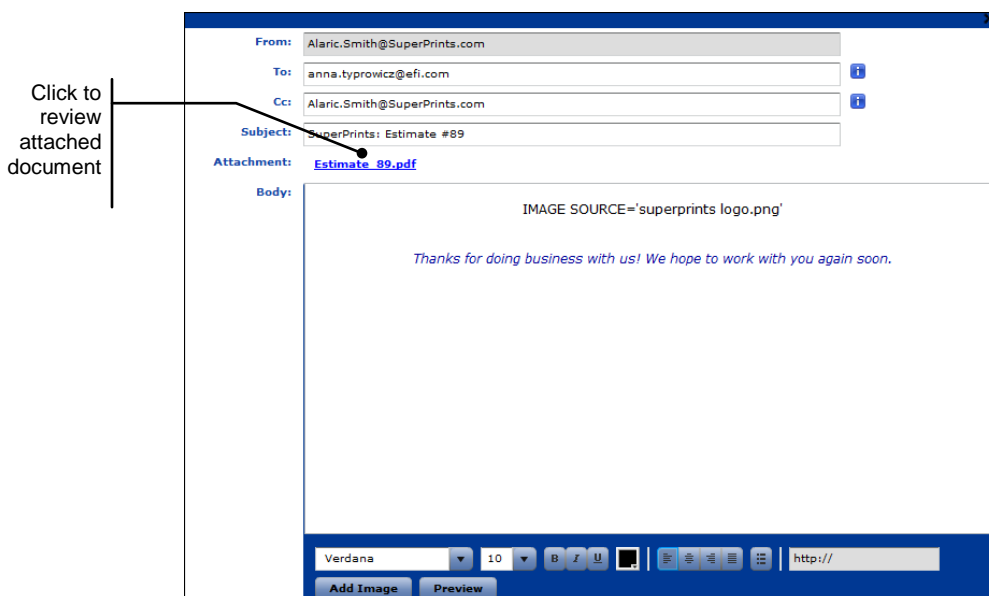
To view  
this image,  
click  
**Preview**



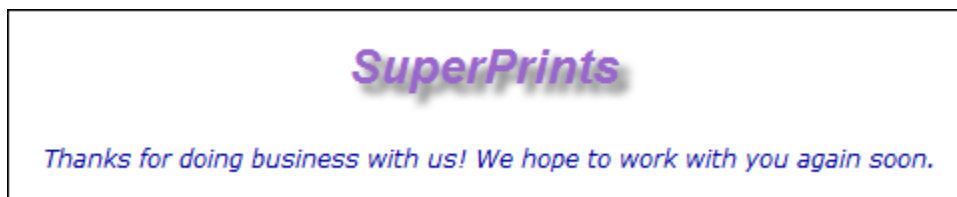
- If your e-mail preferences allow users to customize e-mails before sending them (**Customize e-mail fields before sending** is selected), users can now do the following:
  - Enter multiple e-mail addresses (separated by ;) on both the **To** and **CC** lines.
  - Review the attached document before sending the e-mail.
  - Edit and format the body of the e-mail, e.g., change the text or include images and hyperlinks.



- Preview the e-mail before sending it.



When users click **Preview**, they will see the formatted text including any images and hyperlinks.



**Note** For more information about customizing the body of e-mails, see the *PrintSmith Vision Setup and User Guide*.

#### Known issues with e-mail enhancements:

- When you add an image to the body of the e-mail, the image is currently always added at the bottom of the page. You can move the image where you want it by copying and pasting the image source text.
- If a space in the e-mail body is formatted with underlining, all the subsequent text is also underlined.
- The E-Mail and E-Mail Password fields in the User Definitions window apply only to SMTP accounts, not to Microsoft Exchange Server accounts.

## Previews of content files (digital assets)

The Digital Assets window now includes a **Show Preview** button for previewing a content file you added to a job. You can preview files that are in PDF, JPG, or PNG format.

[illegible]

## Ability to Limit Estimates Displayed in Pending Documents Window

To keep the pending list more manageable and to improve performance, you can now limit the number of days of estimates that are displayed. A new field is available at the bottom of the Pending Documents window. The default is 90 days, but you can change this to fewer or more days and then click **Display**. (To display all estimates, enter **-1**.)

Filter:    **No. of Days of Estimates to Display**

**Note** This setting is global – it applies to all users.

## Scheduler Enhancements

### Ability to customize labels and text used in Scheduler

You can now change labels and text displayed in Scheduler. For example, you may want to use terminology that is standard at your company or that is more familiar to your users.

While on the Configuration page in Scheduler, you can click **Customize Labels and Text** to begin the process of changing labels. For information, see the *PrintSmith Vision Scheduler and User Guide*.

The screenshot shows the top section of the Scheduler Configuration page. At the top, there are four buttons: 'Save', 'Refresh', 'Back', and 'Customize Labels and Text'. The 'Customize Labels and Text' button is highlighted with a red rectangular box. Below these buttons is a 'Today' button. Underneath, there are three tabs: 'General Configuration', 'Split and Merge Configuration', and 'Popup Fields Configuration'. The 'General Configuration' tab is active, showing settings for 'Version Number' (15.1.1.107), 'Show Late Indicator After' (0 minutes), and 'Automatically propagate updates to Gantt Page' (checked).

### New option for starting/stopping scheduled tasks

If you are licensed to use Tracker as well as Scheduler, you can now start/stop tasks with Scheduler instead of Tracker.

Scheduler includes a new general configuration setting: **Use Tracker for Data Collection**. By default, this is turned on if you are licensed to use Tracker. Turn it off if you want to start/stop tasks with Scheduler instead of Tracker.

For more information about starting and stopping tasks, see the *PrintSmith Vision Scheduler User Guide*.

The screenshot shows the 'General Configuration' tab in the Scheduler Configuration page. It displays various settings including 'Version Number' (15.1.1.107), 'Show Late Indicator After' (0 minutes), 'Automatically propagate updates to Gantt Page' (checked), 'Turn on Scheduling Assistant' (unchecked), 'Overrun minutes' (0 minutes), 'Schedule Buffer' (0 minutes), 'Enable switchover calculation' (checked), 'Switch over minutes' (10 minutes), 'Enable Edit Shuts/Overtime creation' (checked), 'No of Reschedule history records to be maintained' (100), 'Enable grouping of tasks' (unchecked), 'Date Format for datagrids and tool tips' (03/24/2015 08:22:56 AM), 'Allow users to manually move task in running state' (checked), and 'Use Tracker for Data Collection' (checked). The 'Use Tracker for Data Collection' checkbox is highlighted with a red rectangular box. To the right, there is a 'Gantt Color Settings' section with color swatches for 'Normal Task Color', 'Late Task Color', 'Running Task Color', 'Setup Color', 'Shut Color', 'Overtime Color', 'Switch over Color', 'Task Group Color', and 'Paused Task Color'.

## Corrections

The sections that follow describe the corrections that were made in PrintSmith Vision version 2.4. For your convenience they are categorized.

### General

- You are now instructed to clear the cache if a mismatch between the client and server versions is detected. (Ref. 14335)

### Imports

- After you start an import of Classic data from the System Monitor window, all the buttons except **Import** and **Import Statistics** are now disabled. (Ref. 11011)

### Internationalization

- When the language is Australian, carton labels now include the quantity per box. (Ref. 14808)
- The **Amount** fields in the Deposit Entry window are now localized to reflect the correct thousands separator. (Ref. 11493)
- Fields in paper templates (**Admin > Paper Calculator**) are now localized to show the correct thousands and decimal separators. (Ref. 11511)
- All fields in the Production Data window are now localized to show the correct separators. (Ref. 11571)

### Charge Definitions

- If the **In sets** value is changed for a charge definition, a full recalculation of a document now uses the changed value. (Ref. 14346, 14622)
- For cutting charges, the latest **Sheets/Lift** value is now used during a full recalculation of a document. (Ref. 14382)
- If you override the default **Sheets/Lift** value for a cutting charge (either in the charge definition or Update Charge window), this value is now retained. (Ref. 14008, 14802)
- For ink charges, the latest **Cover/lb** value is now used during a full recalculation of a document. (Ref. 14384)
- If you change the **Material Cost** or **Material In Sets** value in a charge definition, the latest value is now used during a full recalculation of a document. (Ref. 14362, 14639)
- If you are using the PrintSmith Classic approach to pricing updates, a charge that was duplicated is now correctly included in jobs. (Ref. 14514)

### Press Definitions

- If you enter incomplete values in the **Max Paper Size** and **Min Paper Size** fields in a press definition, they now result in available sizes, e.g., if you enter **17** in the **Max Paper Size** field it results in **17 x 22**, while **8** in the **Min Paper Size** field results in **8.5 x 11**. (Ref. 1422)
- If target pricing is defined for a press definition, but you later change the pricing press for a job, the **Target Adjust** field in the Production Data window is now reset, and the job price no longer reflects the original target pricing. (Ref. 14458)

### Stock Definitions

- When you enter a value in the **Min Size** field in the Stock Picker window and press Tab, the same value is automatically entered in the **Max Size** field. (Ref. 3320)
-

- The time it takes to save an inventoried stock after making changes was significantly reduced. (Ref. 14500)

## Stamp Schedules

- If you enter invalid values when using **Pricing > Stamp Schedule**, all the fields now revert to zero. (Ref. 6713)

## Accounts

- The time it takes to display large numbers of accounts in the Account Picker window was reduced. (Ref. 14595)
- To prevent duplicate contacts from being created, you can only click the **Save** button once. (Ref. 14558)
- You are now warned if you try to create a contact with the same first and last name as an existing contact. (Ref. 14566)

## Estimating

### Invoices and Estimates

- The size and position of the Pending Documents window is now remembered. (Ref. 14636)
- You can now use Ctrl+Atl+O to open the selected document in the Pending Documents window. (Ref. 8044)
- When you copy a historical document or convert an estimate to an invoice, and the original document includes jobs with digital assets (content files), you are now asked if you want to keep those digital assets as part of the new document. (Ref. 14608)
- If another user unlocks a document you have open, you are now warned. (Ref. 14788)
- If a job has predefined charges, and you delete or modify the charges and then recalculate the document, the order of the charges no longer changes on the document. (Ref. 14611)
- Sometimes the grand total in an invoice was off by 1 cent. This was corrected. If you notice this in an existing invoice, open the invoice, open the Document Totals, and save the invoice. (Ref. 14591)
- If you select **Invoice > Update Pending Document**, clicking **Cancel** now closes the window. (Ref. 14851)
- When you make a selection in the **Ship Via** field in the Account Info window, the selection is now retained. (Ref. 14087)
- The **Comments** field in the Account Info window applies only to jobs coming from Digital StoreFront, PrintSmith Site, or Four51. The field is unavailable for other types of jobs.. (Ref. 14058)
- The names in the **Contact List** field in the Account Info window are now in alphabetical order. (Ref. 14477)
- If you add a new contact in the Account Info window, you are warned if the name matches an existing contact name. (Ref. 14603)
- You can no longer create a contact in the Account Info window without entering a first and last name. (Ref. 14607)
- If you create a new contact in the Account Info window but then cancel it, the invoice no longer locks up. (Ref. 14614)
- To avoid duplicated sales categories in documents, you are now warned if the Account Info window is open when you try to save a document. In addition, when the PrintSmith Vision server is started, any duplicate sales categories will be automatically removed. (Ref. 14729)
- If the contact for an invoice is deleted, the contact is no longer locked in the system (preventing the invoice from being saved). (Ref. 14605)

- You are now prevented from saving an estimate or invoice if you enter its number manually and the number already exists in the system. (Ref. 14342)
- Users are now warned if a document was already e-mailed when they click the **E-Mail** button in the Invoice or Estimate window. (Ref. 14686)
- To prevent problems with tax calculations, you are now prevented from deleting a tax table in Table Editor if the table is being used in any pending documents. (Ref. 14592)
- You can no longer use the Delete key to delete charges on a locked invoice. (Ref. 14670)
- If **Print tax name from table** is selected in the page document preferences, the tax on the printed document is now rounded correctly. (Ref. 14120)
- When both **Use invoice address** and **Use statement address** are selected in the header document preferences, the statement address is printed to the right of the invoice address. If only **Use statement address** is selected, the statement address is printed instead of the invoice address. (Ref. 14130)

## Jobs

- You are now warned if you try to open (instead of select) a template to base a job on. (Opening a template modifies it.) (Ref. 14040)
- If you print a job ticket for a locked (historical) invoice, the job price is no longer updated. (Ref. 14673)
- When you are adding charges to a job, you can click the name of a category or command to expand it; you do not have to click the triangle next to the name. (Ref. 13844)
- Order numbers in delivery tickets no longer include separators (like commas for thousands). (Ref. 8643)

## POS

- You can now expand the DEPARTMENT pane in the Cash Register window so longer department names are displayed in full. (Ref. 14108)

## Accounting

- The sales tax summary is now correct for cash register transactions. In a few situations, tax was being doubled. (Ref. 14474)
- Credits and debits can now be posted from the Post Payments window. (Ref. 14517)
- If **Finance Charge** in the Credit/Defaults preferences is set to **0%**, a line for finance charges is no longer included in statements. (Ref. 9861)
- An Account Aging summary report is no longer printed if the **Print summary report** check box on the **Reports** tab is cleared (off). (Ref. 13131)

## Reports

### Work in Progress

- When a standard Work-in-Progress report is sorted by **Taken By**, the report now includes details and totals for each **Taken By**. (Ref. 14588)

### Account History

- The time it takes to generate an Account History report for large data sets was significantly reduced. (Ref. 14625)
- You can now resize the Customer History window to see more information at a time. (Ref. 14610)

## Estimate History

- The sort order in the Estimate History window is now retained. (Ref. 14832)

## Account Ranking

- When you run an Account Ranking report, dates in the **Date Range** fields are now displayed in full. (Ref. 12673)
- You can now adjust column widths in an Account Ranking report so you can display data more effectively. (Ref. 12674)

## Sales

- When the **Sort by Sales Rep** check box is selected for a sales report (e.g., New Invoices or Invoice Pickups), the resulting report is now correctly sorted. (Ref. 14508)

## Re-Order List

- Dates in the Re-Order List report are now correctly formatted. (Ref. 7147)

## Report Manager

- If an EFI standard report (e.g., EFI\_JobTicket.rpt) is part of another report category, you are now prevented from adding it to the Custom report category. (Ref. 14476)

## Administration

### E-Mail Configuration

- You can now configure an e-mail account that ends in .email. (Ref. 14563)

### Stock Orders

- When you press Tab in the Order Stock window (**Admin > Order Stock**), you are now taken through the fields in a logical order. (Ref. 3303)

### Security

- When new features are added to PrintSmith Vision, the System Admin group is now automatically given access to these features. (Ref. 13920, 14320)

### Preferences

- The **Delimiter** fields in the numbers preferences in PrintSmith Vision can no longer be left blank. (When left blank they were causing the Web Worksheet window – used for PrintSmith Site, Digital StoreFront, and Four51 integrations – to hang.) (Ref. 14240)

## Tracker

- If a location is selected in the **Next Location** field in the Stop Tracker Step window, the location is now updated in the Pending List window, as well as in the Location window (when you click **Location** in the Pending Documents window). (Ref. 13346, 14518)
- The time it takes for a change in the Stop Tracker Step window to be completed was significantly reduced. (Ref. 14618)
- When you start and stop a charge and do not change the next location in the Stop Tracker Step window, the job location (if the charge is attached to job) is not updated, but the document location is updated. When you start and stop a charge and change the next location in the Stop Tracker Step window, the job location is also updated. (Ref. 14617)

- The data collected by Tracker now correctly accounts for the hourly costing rate in digital definitions. (Ref. 14491)

## Scheduler

- If an invoice has scheduled tasks, and you mark the invoice as ready for pickup or try to pick it up, you are now prompted to mark the scheduled tasks as complete. You must click **Yes** before you can pick up the invoice. (Ref. 14540)
- Web orders, for example, from PrintSmith Site, Digital StoreFront, or Four51 can now be scheduled. (Ref. 14543)
- The Set View feature in Scheduler was disabled (it was causing PrintSmith Vision to crash). (Ref. 14020)
- When an invoice is voided (canceled), any scheduled tasks for the invoice are now marked as complete and removed from the schedule. (Ref. 14542)

## Digital StoreFront Integration

- When an order comes in from Digital StoreFront, the adjusted price (as calculated in Digital StoreFront) is now distributed across the job and charges in PrintSmith Vision. (Ref. 14094)
- When a buyer who is not associated with a contact in PrintSmith Vision places an order, the company name in the invoice address in the Account Info window is now set to the company name from Digital StoreFront. (Ref. 14314)

## Fiery Integration

- A single quote in a machine name in PrintSmith no longer prevents a Fiery device from being added. (Ref. 14301)
- Media mapping now takes place even if the image-able side of the media is blank in the Fiery media catalog. (Ref. 14441)
- Fiery media mapping first tries to map by the stock number in PrintSmith Vision and the product ID in the Fiery media catalog. If those do not match, the system tries to match by other attributes (size, color, weight, thickness, and recycled percentage). (Ref. 14533)
- The final quantity sent to the Fiery consists of the ordered quantity for the job divided by the number of ups. (Ref. 14609)

## PrintSmith Site Integration

- Occasionally items fail to transmit and are left in state where you can do nothing with them. You can now click **Reset Hung Transactions** on the **Admin** tab of the Web Administration window to clear items that failed to transmit. Any item that has failed to transmit for 45 minutes or longer will be reset. You can then re-transmit it. (Ref. 14531)
- The **Set Design** and **Change Design** buttons are now consistently available for XMPie products. (Ref. 13737, 14053)
- In orders that include multiple items, the price shown for each item is now correct in the order acceptance e-mail. (Ref. 14449)
- When orders come into PrintSmith Vision from PrintSmith Site, the invoice format is now correctly set to the default invoice format. (Ref. 14510)
- The **Delimiter** fields in the numbers preferences in PrintSmith Vision can no longer be left blank. (When left blank they were causing the Web Worksheet window to hang.) (Ref. 14240)