

## PrintSmith™ Vision 3.6 - Digital StoreFront® 9.6 Integration

This document summarizes what you can expect when using the eFlow-based integration of PrintSmith Vision and Digital StoreFront.

For information about integrating PrintSmith Vision with Digital StoreFront and the order workflow in an integrated system, see the *PrintSmith Vision – Digital StoreFront Integration Guide*.

### PrintSmith Vision and Digital StoreFront

EFI PrintSmith Vision is a complete print management system that automates a print or copy shop's estimating, production, and invoicing workflow.

EFI Digital StoreFront is an online storefront where your customers can order print products and services. You can offer a variety of products – including booklets, manuals, business cards, brochures, sell sheets, flyers, and postcards – most of which buyers can customize with a wide selection of printing and finishing options that you offer.

PrintSmith Vision and Digital StoreFront work together. As orders are placed on your Digital StoreFront site, they are sent to PrintSmith Vision. As orders come into PrintSmith Vision, the production workflow is then managed in PrintSmith Vision based on information included in the order. Status information about orders is sent back to Digital StoreFront.

### Pricing

PrintSmith Vision and Digital StoreFront use different approaches for pricing products.

**In PrintSmith Vision:** Pricing is item-specific with many production variables affecting the price calculations. For example, the copier or digital press used for the job, and the stock and charges that make up a job all affect the final price. A job price can also be marked up or down for particular buyers.

**In Digital StoreFront:** Pricing is buyer-specific and defined in price sheets, which can include tiered (quantity-based) and special pricing. When buyers make purchases on your Digital StoreFront site, the product prices come directly from the price sheet for the buyer's print shop or company.

No job production costs are defined or tracked in Digital StoreFront. In PrintSmith Vision, however, you can specify your costs so that you can see what you are spending to produce jobs and understand your profit margins.

#### Important points about pricing

- The pricing for products set in Digital StoreFront will override any pricing defined in PrintSmith Vision. (The pricing includes media and print services.) When an order comes into PrintSmith Vision from Digital StoreFront, the price of the product is fixed since the buyer has already paid for the order. If you change any job specifications for a Web order in PrintSmith Vision (for example, select different paper), the product price remains unaffected.
- If you want to offer the same product on your Digital StoreFront site and to buyers who walk into your print shop, be aware that the price of the product on the site and the price of the product in the print shop might be different because Digital StoreFront and PrintSmith Vision calculate pricing differently. At any time, however, you can see the price difference in PrintSmith Vision (in the Web worksheet for the job).
- Although you can take some steps in PrintSmith Vision to align pricing with the pricing defined on your Digital StoreFront site, the prices might not match exactly. For example, for digital work, you would need to use the copy cost method with no interpolation or step tables, and not give discounts or markups to buyers; for large format work, you would need to use the finish size (and no interpolation).
- If a product is defined only in Digital StoreFront (is not mapped to a PrintSmith product), the price the buyer paid comes through as a price adjustment. Because no pricing is available in PrintSmith Vision, this "adjustment" is the actual price.

## Accounts/Companies and Contacts/Users

A *customer account* in PrintSmith Vision is equivalent to a *company* in Digital StoreFront. A *contact* in PrintSmith Vision is a *user* in Digital StoreFront. Users are the buyers on the storefront.

When PrintSmith Vision is integrated with Digital StoreFront, accounts and companies are mapped and their contacts and users are mapped. The mapping occurs as follows:

- When information about accounts and contacts is sent from PrintSmith Vision to Digital StoreFront, corresponding companies and users are created in Digital StoreFront. This process is also known as *registering* accounts and contacts.
- When a user self-registers on the Digital StoreFront site, a contact is created in PrintSmith Vision. Also, the user's company is used to create an account in PrintSmith Vision if the account does not already exist. If the account does exist, the user is associated with it.
- If Active Directory/SSO is configured in Digital StoreFront, a contact is created in PrintSmith Vision the first time a user logs into Digital StoreFront.

**Note** *Except for self-registered users and SSO users who originate in Digital StoreFront, all other users are created from contacts registered in PrintSmith Vision. If you create a user or a company manually in Digital StoreFront, that information is not sent to PrintSmith Vision.*

Always edit accounts in PrintSmith Vision. Never edit a company in Digital StoreFront because that information is not sent to PrintSmith Vision. For the same reason, always delete accounts (by unregistering them) in PrintSmith Vision, not Digital StoreFront.

You can edit registered contacts/users in either PrintSmith Vision or Digital StoreFront, and the information is automatically updated in the other system. In Digital StoreFront, users can edit their own profiles, or an administrator can edit user information, and the corresponding contact is updated in PrintSmith Vision.

Always delete users (by unregistering contacts) in PrintSmith Vision. Never delete a user in Digital StoreFront because that information is not sent to PrintSmith Vision.

**Note** If a user who is not associated with a registered company places an order on your Digital StoreFront site, the order will come into PrintSmith Vision as a walk-in order.

## Products

Products are always created and priced in Digital StoreFront. In PrintSmith Vision, you then map these products to PrintSmith Vision Web products (and their associated job templates).

**Note** Static products with their fixed content and limited (or no) print options can be mapped to very comparable Web products/job templates in PrintSmith Vision. Ad hoc products, on the other hand, are different each time an order is placed for them so the job templates in PrintSmith are typically generic. You can, however, set similar product defaults in Digital StoreFront and PrintSmith Vision to address the most common use case. You will still need to make changes to the job when the order comes in, but you will at least have some job specifications in place.

You can map each of your Web products 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 Web product in PrintSmith Vision.

When a buyer orders a product on the Digital StoreFront site, and the product is mapped to a PrintSmith Vision Web product, some information about the job (e.g., finish and parent sizes, number of ups) is automatically available from the template assigned to the PrintSmith Vision Web product. Digital StoreFront sends additional production information to PrintSmith as part of the order, and this is used along with the template to produce the job. For example, Digital StoreFront sends information about the media and print and finishing options the buyer selected, as well as URLs for content files.

Your buyers can, of course, order any product on your site, not just those mapped to products in PrintSmith Vision. When a buyer places an order for a product that is *not* mapped to a PrintSmith product, the order comes through as an outside service (buyout) job in PrintSmith Vision, and all the production information for the job comes from Digital StoreFront. You then use this information to produce the job.

## Stocks/Media

*Stocks* in PrintSmith Vision are equivalent to *media* in Digital StoreFront. You can control all your stocks from PrintSmith Vision by registering them as media in Digital StoreFront.

After you register stocks, you then price the corresponding media in Digital StoreFront and add the media to ticket templates. When buyers place an order for a product, the available media selections will be based on the ticket template associated with the product.

When a Digital StoreFront order comes into PrintSmith Vision and includes a registered stock, the stock is “recognized,” and information (for example, costing or inventory tracking) is available for it. The price of the stock, however, always comes from Digital StoreFront (and overrides the price of the mapped stock in PrintSmith Vision).

## Shipping/Delivery Methods

*Shipping methods* in PrintSmith Vision are equivalent to *delivery methods* in Digital StoreFront. Just as with stocks, you can register shipping methods to create delivery methods in Digital StoreFront.

The registered shipping methods must then be priced in Digital StoreFront. You must also associate the shipping methods with your print shop and optionally your companies so they are available to buyers during checkout.

EFI recommends that you set up estimated shipping in Digital StoreFront so that buyers are notified during checkout that the shipping amount is an estimate. The shipping amount is then finalized in PrintSmith Vision.

When a registered shipping method is selected for a Digital StoreFront order, the method is automatically displayed in the **Ship Via** field in various places in PrintSmith Vision so you can easily see what the buyer selected.

## Print Services

Digital StoreFront includes numerous print services and options such as binding or folding that you can add to a ticket template. In turn, you associate a ticket template with print products in Digital StoreFront. (Typically a ticket template is associated with multiple products that share similar characteristics.)

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

In PrintSmith Vision you can map the 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 invoice for the order will automatically have this print service/finishing charge included as a line item. If a print service is not mapped to a charge, it is not a line item in the invoice, but is listed on the Web worksheet for the job, as are all the selections made by the buyer.

Not all Digital StoreFront print options can be mapped directly to charges in PrintSmith Vision. For example, if buyers select an orientation (portrait or landscape) for a job, there is no equivalent mapping in PrintSmith. If you are using a Fiery for production, you must select the correct orientation when submitting the job to the Fiery. Similarly, the Digital StoreFront option to print in color or black-and-white is not automatically mapped in PrintSmith Vision which has color or B&W jobs. If the job template in PrintSmith is for a color job, but the Digital StoreFront order has the B&W print option selected, the job type in PrintSmith will remain color. The Web worksheet will indicate what the buyer selected.

**Notes** 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.

If you are also integrated with a Fiery, mapped print services can ensure that the Fiery gets finishing instructions.

## Taxes

If taxes are calculated in Digital StoreFront, they are treated as estimates in PrintSmith Vision. The final tax is always calculated in PrintSmith Vision.

## Communication

### What is sent from Digital StoreFront

When a Web order comes into PrintSmith Vision from Digital StoreFront, an invoice is created for it automatically, and Digital StoreFront sends the following information to PrintSmith:

- Order and due dates
- Order number
- Order total (and breakdown of pricing)
- Shipping and billing addresses
- Shipping amount and handling fee

**Note** A handling fee (if any) is included in the **Shipping** line of the invoice.

- Rush fee (added to the invoice total)

**Note** In a multi-job order, the rush fee is added to the first job in the order. If this job is deleted, the rush fee is lost.

- Special and delivery instructions
- Payment method and amount
- Print (production) specifications selected by the buyer on the site (for example, media/stock or binding)
- URLs for content files that were uploaded to the site
- Page count for content files

**Note** For B&W or color jobs, the number of *sheets* in PrintSmith Vision is automatically calculated based on the page count and number of sides (single-sided vs. double-sided) in the Digital StoreFront order. For example, if the page count in the order is 10, and the buyer selected single-sided (simplex), the **Sheets** field in the job will be set to 10. If the buyer selected double-sided (duplex), **Sheets** will be set to 5 because the number of pages is divided by 2. The total number of copies in PrintSmith Vision is the number of sides to be printed based on the ordered quantity.

### Status updates

Certain events in PrintSmith Vision trigger a change to the order status in Digital StoreFront:

- When a production location is selected in PrintSmith Vision for a Digital StoreFront order, for example, Design or Bindery, the status of the order in Digital StoreFront changes to **In production**.

**Note** If an order includes more than one job, the timing of the status change to **In Production** depends on how **Status changes for jobs and multipart orders** is set in Digital StoreFront (**Site Settings > Basic Settings**).

- When an invoice is marked **Ready for pickup**, or all the jobs in a delivery ticket are marked as **Delivered** (on the **Status** tab in the Delivery Ticket window in PrintSmith Vision), the status of the order in Digital StoreFront changes to **Shipped**.
- If you cancel an invoice in PrintSmith Vision *before* marking it ready for pickup or marking jobs as delivered, the status of the order in Digital StoreFront changes to **Canceled**.

**Note** Once the status of an order in Digital StoreFront is **Shipped**, it cannot be canceled. If you do need to cancel the order, and a credit card payment was involved, you must reverse it manually (either in Digital StoreFront or on the payment gateway).

- If the payment method was *not* a credit card, when an invoice in PrintSmith Vision is picked up and posted, the status of the order in Digital StoreFront changes to **Invoiced and Completed**. If the payment amount in PrintSmith Vision changed (due to taxes or adjustments to shipping), this will be reflected in Digital StoreFront.

- If the buyer selected a credit card as the payment method, Digital StoreFront contacts a payment gateway (configured in Digital StoreFront) to authorize the credit card payment, but the credit card is not charged when the order is placed. After the invoice is marked ready for pick up, the status of the order in Digital StoreFront changes to **Shipped**, but the card is not charged yet. When you pick up and post the invoice in PrintSmith Vision, the credit card is now charged the final invoice amount (as calculated in PrintSmith Vision) and the status of the order in Digital StoreFront changes to **Invoiced and Completed**.

**Note** Digital StoreFront handles both the authorization and charging of a credit card, but the final charge amount comes from PrintSmith Vision.