Understanding the PrintSmith™ Vision and Digital StoreFront® Integration

This document summarizes what you can expect when using PrintSmith Vision and Digital StoreFront together.

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 (buyers) can order print products and services from the convenience of their office or home. You can offer a variety of products – including booklets, manuals, business cards, brochures, sell sheets, flyers, and postcards – most of which can be customized with a wide selection of printing and finishing options that you offer.

PrintSmith Vision and Digital StoreFront work together. As orders are placed and paid for on your Digital StoreFront site, they are available for request by 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.

Products

To get your Digital StoreFront site up and running and open for business, define the products and pricing you want to offer on your online store in Digital StoreFront. If you have products in PrintSmith Vision that you want to make available in your online store, set up the products in both PrintSmith Vision and Digital StoreFront and then link them through matching SKUs (product IDs). (In PrintSmith Vision, you set up these products as Web products and include job templates.)

When a buyer orders a product on your Digital StoreFront site, and the product is linked to a PrintSmith Vision product, information about the job is automatically available from the template assigned to the product in PrintSmith Vision. Digital StoreFront sends additional production information to PrintSmith Vision, which is available in the form of a Web worksheet. The template and the worksheet are then used together to produce the job.

Your buyers can, of course, order any product on your site, not just those linked to products in PrintSmith Vision. When a buyer places an order for a product that is *not* linked to a PrintSmith product by SKU, 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.

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 (and then see how they compare to your sales prices).

Important points about pricing

- The pricing for products set in Digital StoreFront will override any pricing defined in PrintSmith Vision. When an order comes into PrintSmith Vision from your Digital StoreFront site, the price 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 a different media stock), the price remains unaffected, *except for* credit card orders where the final amount charged to the credit card comes from PrintSmith Vision.

- 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).

- 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 (not matched by SKU 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.

Buyers on the Site

A *customer account* in PrintSmith Vision is equivalent to a *company* in Digital StoreFront. Although accounts in PrintSmith Vision are not directly linked to companies in Digital StoreFront, you can link PrintSmith contacts to users in Digital StoreFront by entering the PrintSmith contact ID in a user's profile in Digital StoreFront. Then, when a linked user places an order in Digital StoreFront, PrintSmith will know which contact placed the order and have information about that contact's account.

If a user without a PrintSmith contact ID places an order on your Digital StoreFront site, the order will come into PrintSmith Vision as a walk-in order.

Communication

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 (reflected in the **Shipping** line of the invoice)

- Rush fee (added to the invoice total)

Notes	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.
	In Digital StoreFront, a print shop can apply a handling fee; this is *not* transmitted to PrintSmith Vision so is not part of the invoice total.

- Payment method

- Print (production) specifications selected by the buyer on the site (for example, media/stock or binding)

Note	Typically, you would copy the print specifications to the job ticket in PrintSmith Vision so the job can be produced as the buyer requested.

- URLs for content files that were uploaded to the site

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**).

- 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 in PrintSmith Vision (which means the order is complete), the status of the order in Digital StoreFront changes to **Shipped** (complete), 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).

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

- If the payment method was *not* a credit card, when an invoice in PrintSmith Vision is marked ready for pickup, the status of the order in Digital StoreFront changes to **Shipped** (complete). If the payment amount in PrintSmith Vision changed, this will *not* be reflected in Digital StoreFront.

- When all the jobs 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** (complete).

- If you cancel an invoice in PrintSmith Vision *before* marking it ready for pickup, 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).