

**efi** PrintSmith Vision™



## Digital StoreFront® Integration Guide

PrintSmith Vision  
Version 3.0

Digital StoreFront  
Version 8.4

August / 2015

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EFI PrintSmith Vision | *Digital StoreFront Integration Guide*

August 2015 PrintSmith Vision 3.0, Digital StoreFront 8.4

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# Introduction

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## 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 on the storefront – 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 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. PrintSmith Vision then sends information about the status of orders to Digital StoreFront.

## About this Guide

This guide explains how to set up PrintSmith Vision with Digital StoreFront®, what takes place when buyers order products on the site and the orders come into PrintSmith Vision, and what you do to manage these Web orders.

The guide assumes that PrintSmith Vision and Digital StoreFront are already set up and focuses on how to integrate and use the two products.

## Additional Sources

For information about	See
Setting up and administering Digital StoreFront	<i>Digital StoreFront Installation Guide</i> and online Help on the site
Installing PrintSmith Vision	<i>PrintSmith Vision Installation and Upgrade Guide</i>
Setting up and using PrintSmith Vision	<i>PrintSmith Vision Setup and User Guide</i>
Using the Web site	Online Help <i>Digital StoreFront User Guide</i> (which you can customize for your print buyers)

## If You Are Upgrading

If you were already using Digital StoreFront with PrintSmith 8.1, and are upgrading to PrintSmith Vision:

- Follow the instructions in “Upgrading from PrintSmith Classic 8.1” starting on page 25.
- The procedures for handling Web orders are very similar to those in PrintSmith 8.1, but be sure review the information in the “Order Workflow” chapter starting on page 33 to understand the few differences.

If you are upgrading from PrintSmith 8.1, and were *not* using Digital StoreFront before but want to do so now:

- Upgrade to PrintSmith Vision as described in the *PrintSmith Vision Installation and Upgrade Guide*.
- Once PrintSmith Vision is installed, follow the instructions for setting up PrintSmith Vision with Digital StoreFront starting on page 9 of this guide.
- Familiarize yourself with the order workflow. See page 34 of this guide.

## If You Are Updating a PrintSmith Vision Digital StoreFront Integration

If you were integrated with Digital StoreFront using an earlier version of PrintSmith Vision (pre-3.0), you must update your integration in order to take advantage of the new two-way communication between PrintSmith Vision and Digital StoreFront. For instructions, see page 29.

## Contact Information

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

### EFI Customer Care Site

<https://customer.efi.com/support>

Use the EFI Customer Care site to report issues, as well as to track the status of issues you reported.

**Important** You need a user name and password to log into the EFI Customer Care site. Please contact your Customer Support representative to have an account created for you.

### 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

[printsmith.support@efi.com](mailto:printsmith.support@efi.com)

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# Setup for New Integrations

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## Overview

**Important** The instructions in this chapter apply to those who are *new* to Digital StoreFront.  
 If you were already using Digital StoreFront with PrintSmith Classic and are upgrading to PrintSmith Vision, see “Upgrading from PrintSmith Classic 8.1” starting on page 25.  
 If you are updating an existing PrintSmith Vision-Digital StoreFront integration, see page 29.

The process of setting up PrintSmith Vision with Digital StoreFront involves these main tasks:

- Make sure you meet system requirements.
- In Digital StoreFront, make sure you are licensed for integration with an MIS (PrintSmith Vision).
- Coordinate the integration process with EFI Support – a Support member *must* run the enhanced integration script on your Digital StoreFront database for the two-way integration between PrintSmith Vision and Digital StoreFront to work. (This applies whether your Digital StoreFront installation is EFI-hosted or self-hosted.)
- In Digital StoreFront, create a PrintSmith Vision MIS.
- In Digital StoreFront, associate this MIS with a print shop and define some print shop settings.
- In PrintSmith Vision, specify integration preferences to establish a connection with Digital StoreFront.
- Link products in PrintSmith Vision to products in Digital StoreFront.
- Link contacts in PrintSmith Vision to users in Digital StoreFront.

**Note** The process of linking products and users/contacts is an ongoing activity. As you add new products in PrintSmith Vision that you want available on the Web site, or as contacts/users change, you must establish new links between PrintSmith Vision and Digital StoreFront.

- (Optional) Define a “taken by” value.
- (Optional) Define a receive state for orders.
- Place a test order.

### Task 1: Meet System Requirements

To take advantage of the integration between PrintSmith Vision and Digital StoreFront, the following versions of the products are required:

- PrintSmith Vision 3.0
- Digital StoreFront 8.4 (if you are self-hosted, be sure you have this version installed)

### Task 2: Check Your Digital StoreFront License for MIS Integration

To use Digital StoreFront with an MIS like PrintSmith Vision, you must be licensed to do so.

1. Log into Digital StoreFront as an administrator.
2. Go to **Administration > Licensing**.
3. Make sure the **EFI MIS Connector** check box is selected.
4. If the **EFI MIS Connector** check box is selected, you are licensed to use an MIS with Digital StoreFront; continue with Task 2 below.

If the **EFI MIS Connector** check box is *not* selected, contact your EFI Sales Representative to purchase the license.

**Note** You can continue with some aspects of setup (for example, set up products in PrintSmith Vision) while waiting for your license.

## Task 3: Contact PrintSmith Support

- Contact PrintSmith Support as described on page 7.

Support must run the enhanced integration script on your Digital StoreFront database for the two-way integration with PrintSmith Vision to work. (This applies whether your Digital StoreFront installation is EFI-hosted or self-hosted.)

*Do not omit this step.*

## Task 4: Configure a PrintSmith Vision MIS in Digital StoreFront

**Important** The instructions here apply to those who are *new* to Digital StoreFront. If you were already using Digital StoreFront with PrintSmith Classic and are upgrading to PrintSmith Vision, see “Upgrading from PrintSmith Classic 8.1” starting on page 25.

The first step is to configure an MIS in Digital StoreFront. PrintSmith Vision must always be configured as a basic integration with Digital StoreFront. In addition, a PrintSmith Vision MIS must always be configured to request orders to be sent from Digital StoreFront as the orders are placed and paid for.

1. Log into Digital StoreFront as an administrator.
2. Go to **Administration > MIS CONFIGURATION > MIS Systems**.
3. Click **Add New MIS**.



4. Complete the MIS Systems page:
  - a. In the **MIS Type** field, select **EFI PrintSmith Vision** and enter a descriptive **Name** for the MIS.
  - b. Select the **Basic Integration** check box.
  - c. Select the **Enable Order Requests** check box.
  - d. *Ignore* the **URL or Network Location** field; it does not apply to PrintSmith Vision.
  - e. Click **Save**.

The system now completes all but the **Routing Identifier** and **Facility Name** under **Request Order Connectivity Info**.

5. In the **Routing identifier** field, enter any kind of identifier you want to use, for example, **RID** and then click **Save**. (This same identifier must be used on the PrintSmith Vision side.)

**Note** The **Facility Name** will be added automatically after you associate the MIS with a print shop as described next. You will need the information in these six fields when you set your integration preferences in PrintSmith Vision, as described in “Task 6: Set Integration Preferences to Establish a Connection” on page 14.

## Task 5: Associate MIS with Print Shop and Define Print Shop Settings

After you configure PrintSmith Vision on the MIS Systems page, you must associate it with a print shop in Digital StoreFront. A print shop is the facility that handles the orders placed on the site, for example, a print center or copy shop.

In addition to associating the MIS with a print shop, if you plan to offer digital downloads of products or direct mail products on your site, you must configure some default shipping methods for the print shop. When buyers order a digital download or direct mail product, no shipping information is required in the cart. When the order is sent to the PrintSmith Vision, however, a delivery method is required (even if it does not apply to the type of product being ordered). To support this, you must map three default shipping methods to delivery methods that are available for this purpose in Digital StoreFront.

**Note** Direct mail products and the print shop settings described here were introduced in Digital StoreFront v. 7.6.

1. Go to **Administration** in Digital StoreFront and click **Print Shops**.
2. Double-click the print shop you want to associate with the MIS (or add a new print shop).
3. Scroll down to the **MIS System** section and select the MIS to associate with the print shop. (This is the PrintSmith Vision MIS that you just configured on the MIS Systems page in Task 4 on page 11.)

4. If you plan to offer digital downloads or direct mail products on the site:
  - a. Select the delivery methods to be used for digital download or direct mail orders by clicking **Assign/Update Delivery Methods** and then selecting **Digital Delivery**, **USPS First Class**, and **USPS Standard Mail**.

<input type="checkbox"/>	Description	Display Priority
<input checked="" type="checkbox"/>	Airborne Overnight	<input type="text"/>
<input checked="" type="checkbox"/>	Courier	<input type="text"/>
<input checked="" type="checkbox"/>	Customer Pick-Up	<input type="text"/>
<input checked="" type="checkbox"/>	Digital Delivery	<input type="text"/>
<input checked="" type="checkbox"/>	FedEx Overnight	<input type="text"/>
<input checked="" type="checkbox"/>	UPS Overnight	<input type="text"/>
<input checked="" type="checkbox"/>	USPS First Class	<input type="text"/>
<input checked="" type="checkbox"/>	USPS Standard Mail	<input type="text"/>

Save Cancel

- b. For **Default Shipping Method for Digital Download**, select **Digital Delivery**.
- c. For **Default Shipping Method for Direct Mail (Standard)**, select **USPS Standard Mail**.
- d. For **Default Shipping Method for Direct Mail (First Class)**, select **USPS First Class**.

Default Shipping Method for Digital Download:	Digital Delivery ▼
Default Shipping Method for Direct Mail (Standard):	USPS Standard Mail ▼
Default Shipping Method for Direct Mail (First Class):	USPS First Class ▼

**Note** These three default shipping methods will never be available as selections in the cart; they are used “behind the scenes” to support the MIS order workflow for digital downloads and direct mail.

5. Click **Save**.

The print shop you associated with your MIS is now added to the **Facility Name** field under **Request Order Connectivity Info** on the MIS Systems page.

Request Order Connectivity Info	
Web Service Url:	<input type="text" value="http://shirleyf-vs2012/rel82/WebServices/OrderInfoXml.asmx"/>
Facility Name:	<input type="text" value="Vision"/>
Shared Secret:	<input type="text" value="XNu8Xhvh"/>
Site Key:	<input "="" type="text" value="Y9CMR4/OYfJ+Cj6Uc9WtgtVFX0A="/>
Site Callback Url	<input type="text" value="http://shirleyf-vs2012:80/rel82/AsyncCommHandler.ashx?SITEGUID=4c6bcdfc-090"/>
Routing Identifier	<input type="text" value="RID"/>


## Task 6: Set Integration Preferences to Establish a Connection

To establish the connection between PrintSmith Vision and Digital StoreFront, you must now copy the information from the **Request Order Connectivity Info** fields on the MIS Systems page in Digital StoreFront to the corresponding fields in the Integration preferences in PrintSmith Vision.

1. In Digital StoreFront, open the MIS Systems page for the PrintSmith Vision MIS that you configured in Task 4 on page 11. You will need to copy information from the MIS Systems page.
2. In PrintSmith Vision, click **Preferences** in the QuickAccess panel (or select **Admin > Preferences**).
3. Under **System**, select **Integration**.
4. Select the **Enable DSF Integration** check box.
5. One field at a time, copy the information from each of the six fields (**Web Services URL** through **Routing Identifier**) on the MIS Systems page in Digital StoreFront (see the figure on the previous page) to the corresponding field in the PrintSmith Vision Integration preferences.

**Tips** The fields (except for **Routing Identifier**) in Digital StoreFront are read-only, but you can select the information in a field and use Ctrl+C to copy it. Then use Ctrl+V to paste it into the corresponding field in PrintSmith Vision.

To ensure you copy the entire URL in the **Site Callback Url** field, use Ctrl+A to select everything in the field and then use Ctrl+C to copy it.

On a Macintosh computer the Command key  is the equivalent of Ctrl on a Windows computer.

6. Click **Save**.

<input checked="" type="checkbox"/> <b>Enable DSF Integration</b>	<b>Reset</b>	<b>Check Now</b>
<b>Web Services URL</b>	shirleyf-vs2012/rel82/WebServices/OrderInfoXml.asmx	
<b>Facility Name</b>	Vision	
<b>Shared Secret</b>	XNu8Xhvh	
<b>Site Key</b>	Y9CMR4/OYfj+Cj6Uc9WtgtVFX0A=	
<b>Status Callback URL</b>	:SITEGUID=4c6bcdfc-0907-4f12-bb19-eb1585e026c8	
<b>Routing Identifier</b>	RID	

7. *Log out of PrintSmith Vision and log back in.*
8. Open the Integration preferences again and check that the integration is working:
  - a. Click **Check Now**.
  - b. Click **History**.

The section below the **History** button should now show some sample XML code similar to what is shown in the figure below.

History	
Date/Time	XML Info
Sun Aug 3 20:06:16 GMT- 0400 2014	<?xml version="1.0" encoding="utf-8"?><soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:wsa="http://schemas.xmlsoap.org/ws/2004/03/addressing" xmlns:wssse="http://docs.oasis-open.org/wss/2004/01/oasis-200401- wss-wssecurity-secext-1.0.xsd" xmlns:wsu="http://docs.oasis-open.org/wss/2004/01/oasis-200401-wss-wssecurity-utility- 1.0.xsd"><soap:Header><wsa:Action>http://www.efi.com/dsf/DataRequestServices/RequestNewOrderResponse</wsa:Action><wsa:Message ID>uuid:307382f4-adf7-4d70-9331-ea870a8eeeb5</wsa:MessageID><wsa:RelatesTo>uuid:0573120d-3ef6-40ee-b6ae- 2744570e2a84</wsa:RelatesTo><wsa:To>http://schemas.xmlsoap.org/ws/2004/03/addressing/role/anonymous</wsa:To><wssse:Security> <wsu:Timestamp wsu:Id="Timestamp-eccadd1b-931c-4456-ade7-e521dcac253c"><wsu:Created>2014-08- 04T00:06:16Z</wsu:Created><wsu:Expires>2014-08- 04T00:11:16Z</wsu:Expires></wsu:Timestamp></wssse:Security></soap:Header><soap:Body><RequestNewOrderResponse xmlns="http://www.efi.com/dsf/DataRequestServices"><RequestNewOrderResult>&lt;?xml version="1.0" encoding="utf-16"?&gt;&lt;POD xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns="com.efi.enetwork.ps.pwa"&gt;&lt;PORTALSOURCE&gt;DSF&lt;/PORTALSOURCE&gt;&lt;PORTALDESTINATION&gt;PS&lt;/PORTALDESTINAT ION&gt;&lt;VERSION&gt;1.8&lt;/VERSION&gt;&lt;ORDERSVCRQ&gt;&lt;ORDERMGMTSVCRQ&gt;&lt;ACTION&gt;ORDER&lt;/ACTION&gt;&lt;TRANS ACTIONID&gt;d4e6082-15c3-4c75-b291- b2d63fce252e&lt;/TRANSACTIONID&gt;&lt;ORDERID&gt;140&lt;/ORDERID&gt;&lt;REFERENCEID&gt;140&lt;/REFERENCEID&gt;&lt;EXPECTED DATE &gt;1407544200000&lt;/EXPECTED DATE&gt;&lt;SHIPMENTNOTES&gt;Site Price Details: Promotional Pens at \$5.00 per unit for 10 Quantities and Totalled to 550.00,Shipping:USD 0.00,Rush Fees:USD 0.00,Taxes:USD 0.00,Order Total:USD 50.00,Delivery Instructions:Customer Pick- Up.,&lt;/SHIPMENTNOTES&gt;&lt;COMMENTS&gt;Shipping Address: 1 Main St Bldg 3 Suite 101 Norwich

9. If no XML code is displayed:
  - a. Verify that you copied information correctly from the MIS Systems page in Digital StoreFront to the fields in the Integration preferences.
  - b. If a correction is required, click **Reset**, copy the fields again, and click **Save**.
  - c. Repeat step 8 again.
  - d. If the problem continues on a Mac-based PrintSmith Vision server, edit the **Services URL** field and replace the domain name with an IP address. For example, if the domain name is **mydsf**, replace it with the IP address (**10.110.36.121** in the example below). So instead of:

**http://mydsf/dsf/WebServices/OrderInfoXml.asmx**

enter

**http://10.110.36.121/dsf/WebServices/OrderInfoXml.asmx**

**Notes** Once PrintSmith Vision is integrated with Digital StoreFront, do *not* use the **Reset** button unless advised to do so by EFI Support.

If you cannot complete the integration at this time, you can still begin to create products and templates in PrintSmith Vision, as long as the **Enable DSF Integration** check box is selected in the PrintSmith Vision Integration preferences.

## Task 7: Link Products

Any PrintSmith Vision product that you want to be linked to a product in Digital StoreFront must be defined as a Web product in PrintSmith Vision and must have a job template associated with it. The template is used to define the job when an order for the product comes in from the site.

Each Web product in PrintSmith Vision is assigned a unique SKU. To link the PrintSmith product to a product in Digital StoreFront, you enter this SKU as part of the product settings on the site.

**Important** This SKU linking is required *only* for products that you want defined in both PrintSmith Vision and Digital StoreFront. You can set up other products (and pricing for those products) just in Digital StoreFront, and orders for these kinds of products will come through as outside service jobs (buyouts) in PrintSmith Vision. For more information, see page 41.

### About products in Digital StoreFront

Products in Digital StoreFront include:

- *Static products* which have fixed content, for example, application forms, course materials, and so on. Some static products are ordered as they are; others can be customized with print options (type of paper, stapling, and so on).
- *Non-printed products* such as merchandise, coffee mugs, or boxes of pencils.
- *Ad hoc products* such as booklets, brochures, or specialized copy jobs for which buyers supply the content (typically a PDF) and print specifications (type of paper, binding, and so on).
- *Digital downloads* of course notes, forms, photographs, e-books, and so on. (These are treated as non-printed products when they come into PrintSmith Vision.)
- Products (such as conference materials, flyers, or cards) for which a digital download is available *in addition to* the printed version.
- *Matrix products* are composite products that combine two or more related products into a single product with various options so that buyers have a convenient way of choosing the options they want, for example, a shirt in a choice of sizes and colors.
- *Kits* are made up of other products packaged together. For example, a wedding kit might include an invitation photo card, envelopes, a wedding program, and key chains for the guests.
- *DSFdesign Studio™ products* which are template-based printed products such as cards or posters that buyers personalize in various ways, for example, position and size text, images, and shapes; add new text, images, and shapes; edit and format text; or enhance images.
- *Variable data products* (VDPs) which are template-based printed products that buyers can customize for a range of recipients with different names, addresses, and so on.
- *Direct mail products* can be personalized and mailed to recipients on a mailing list.

**Notes** DSFdesign Studio products, VDPs, and direct mail products are optional features in Digital StoreFront and are licensed separately.

Digital downloads, matrix products, and direct mail products are available only for SmartStores, not classic storefronts.

Although PrintSmith Vision products can be linked to any kind of product in Digital StoreFront, it is best to link products for which a job template in PrintSmith Vision makes sense. Products that do not benefit from a job template should be defined just in Digital StoreFront. When ordered, they will come into PrintSmith Vision as outside service jobs.

**Tip** A job template can always be edited (and often *must* be edited) when an order comes into PrintSmith Vision so the template does not have to be exact. For example, an order for an ad hoc product is always “new” to PrintSmith Vision so a template for an ad hoc product is typically generic. If you process many ad hoc jobs of different types, you may want to create Web products and templates for each type, for example, “Ad Hoc Digital” or “Ad Hoc Booklet.”



## About product pricing

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

**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.

**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.

### Important points about pricing

- The pricing for products set in Digital StoreFront *always* overrides 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 stock), the price remains unaffected, *except for credit card orders* where the final amount charged to the credit card comes from PrintSmith Vision.
- Whenever an order comes in from the site, you can see (in the Web worksheet for the job) whether the price the buyer paid was higher or lower than the price in PrintSmith Vision. You can use this information to adjust the pricing on either side if you want.
- 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 calculate pricing differently. At any time, however, you will be able to see the price difference in PrintSmith Vision (in the Web worksheet).
- Although you can take some steps in PrintSmith to align pricing with the pricing in Digital StoreFront, the prices might not match exactly. For example, for digital work, you can only use the copy cost method with no interpolation or step tables, and not give discounts or markups to buyers; for large format work, you must use the finish size (and no interpolation).
- If a product in Digital StoreFront has no pricing defined, it automatically results in a "request for quote" when ordered on the site. In this case, you send the buyer a quote for acceptance or rejection. If the buyer accepts the quote, the buyer pays for the order, and the order is sent to PrintSmith Vision. *The quote process takes place entirely on the Digital StoreFront side.*
- If a product is defined only in Digital StoreFront (is not matched by SKU to a PrintSmith Vision 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 of the product.

**Note** Although the pricing you define in PrintSmith Vision is not used for Web orders, you can still use PrintSmith Vision for *costing* so that you can see what you are spending to produce jobs and understand your profit margins.

## Define Web products in PrintSmith Vision

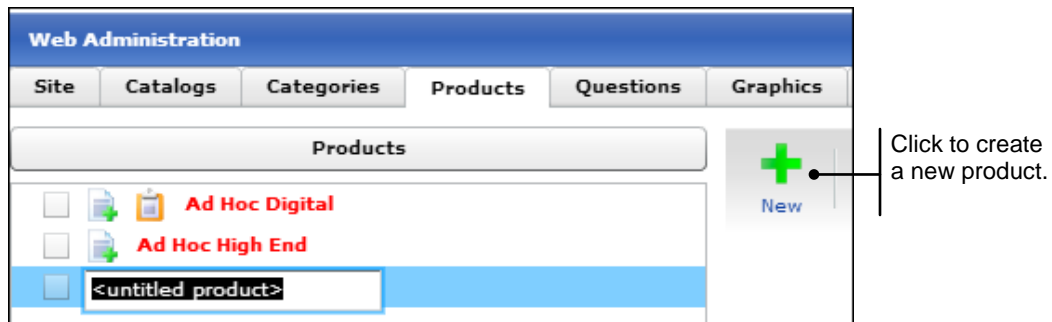
The products in PrintSmith Vision that you want to link to products in Digital StoreFront are defined in the Web Administration window in PrintSmith. Each product must have a job template associated with it.

**Tip** You can begin to create products and templates in PrintSmith Vision even if the integration with Digital StoreFront is incomplete. Just make sure that the **Enable DSF Integration** check box is selected in the PrintSmith Vision Integration preferences.

1. In PrintSmith Vision, select **Admin > Web Administration**. The Web Administration window opens.
2. Click the **Products** tab. (Most of the tabs in this window are unavailable when you are integrated with Digital StoreFront, *unless* you are also using PrintSmith Site®.)

**Important** If you are also using PrintSmith Site, many fields are available that do not apply to Digital StoreFront. Only complete the fields described below.

3. Click **New**. An **<untitled product>** field is displayed under **Products** in the left pane.

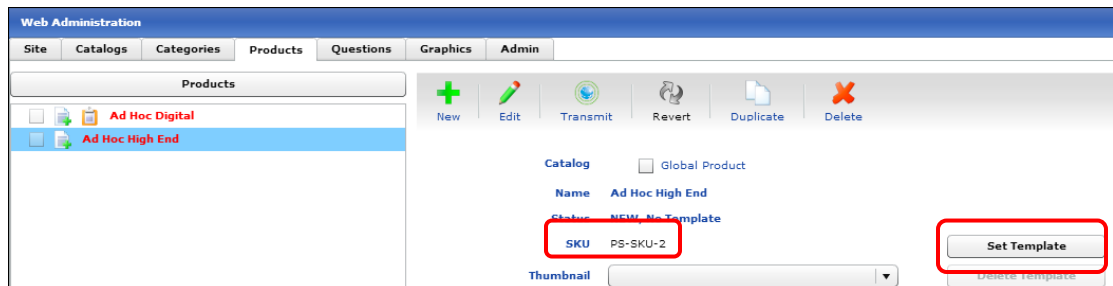


4. Enter a name for the product and press Tab.

**Note** A unique SKU is automatically assigned to the product. You will need to enter it in Digital StoreFront as described in "Define products in Digital StoreFront" on page 19.

5. Associate a job template with the product. When an order for the product comes in from the site, the template is used to produce the job (but the template can always be modified at that point). Do one of the following:
  - Click **Set Template** and create a job from the beginning. *Be sure to add charges to the job.*
  - Drag an existing job onto the product. You can open an invoice from history or from the pending list, and drag the job from there.

**Tip** If you are creating a template for an ad hoc product (which will be different each time an order is placed for it), make the template generic. For example, select a typical stock, select the pricing and costing press or copier that you are most likely to use, and add the charges that typically apply. 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.



6. Leave the **Description** field blank; the product name from Digital StoreFront serves as the description when the product is ordered. Also ignore the remaining fields on the **Products** tab.
7. Repeat steps 3 through 6 for all the products you want to offer on your Digital StoreFront site.
8. Close the Web Administration window and *be sure to save your changes when prompted.*

**Tip** After you associate a template with a product, you can later edit the template (by clicking **Change Template**) or remove it altogether (by clicking **Delete Template**).

## Define products in Digital StoreFront

Any product that was defined in PrintSmith Vision as a Web product must also be defined in Digital StoreFront and linked to the PrintSmith product by SKU. Either edit existing products in Digital StoreFront to link them to PrintSmith Vision products or create new products.

**Tip** Keep in mind you can also define products just in Digital StoreFront and not link them to Web products in PrintSmith Vision. These products come in as outside services to PrintSmith Vision, with all the job specifications coming from Digital StoreFront. For more information, see page 41.

1. Log into Digital StoreFront as an administrator.
2. Go to **Administration > Site Configuration > Products**. The Manage Products page opens.

3. Either open an existing product or click **Create Product** to add a new product.
4. Follow the usual procedure for editing/creating a product *with one exception*: in the **Product Id** field under **Product Information**, enter the SKU number that was assigned to the same product in PrintSmith Vision.

Use the format **PS-SKU-*n*** where *n* is the SKU, for example, **PS-SKU-2**.

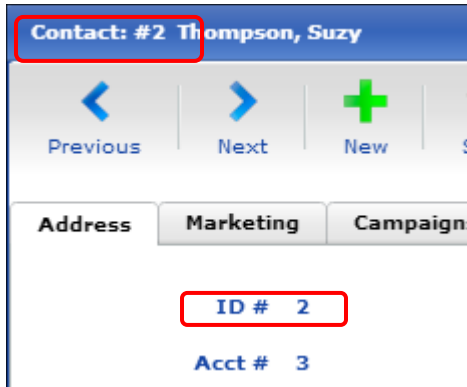
Product ID must match SKU of Web product in PrintSmith Vision.

5. Save the product and publish it to the storefront (if the product was not published before).

## Task 8: Link Site Users and Contacts

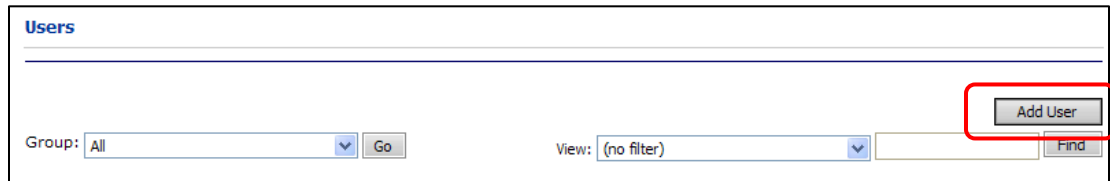
In Digital StoreFront, the users (buyers) associated with a company place orders on the site. These users must be linked to the contacts for a customer account in PrintSmith Vision. (A customer account in PrintSmith Vision is equivalent to a company on the site, but the two are not linked; only users and contacts are linked.)

Each contact in PrintSmith Vision has a unique ID that is assigned automatically when you create a contact (with **AR > Contacts**). This ID is displayed in the title bar of the Contact window as well as on the **Address** tab.



When you create (or edit) a user profile in Digital StoreFront, you must enter this contact ID to link the user to the PrintSmith contact.

1. Log into the Digital StoreFront site as an administrator.
2. Go to **Administration > USERS / ACCESS > Users**. The Users Page opens.



3. Click **Add User** to create a new user. (Alternatively, edit an existing user.)
4. Enter the information about the user as you normally do *with one exception*: in the **PrintSmith Contact ID** field in the user profile, enter the ID of the contact as it is defined in PrintSmith and then click **Save**.

**Note** If a user without a PrintSmith contact ID places an order on the site, the order comes in as a walk-in order.

## Task 9: (Optional) Define Value for “Taken by”

In some places in PrintSmith Vision (for example, the Account Info window), a **Taken by** field identifies who took the order. When you are integrated with Digital StoreFront, the system is essentially taking the order. If you want this indicated in the **Taken by** field, you can set a value for this field.

1. In PrintSmith Vision, select **Admin > Web Administration**.

**Note** The fields on the **Site** tab are primarily used to integrate PrintSmith Vision with PrintSmith Site. Only the **Taken by** field applies to an integration with Digital StoreFront; ignore the other fields.

2. In the **Taken by** field, enter any identifying information you want to use for orders coming in from Digital StoreFront, for example, **System** or **Web**.



3. Close the Web Administration window and save the information when prompted.

## Task 10: (Optional) Define Receive State

If you have defined any “hold” states – in the Hold State table in PrintSmith Vision – you can assign one of these states to orders that come into PrintSmith Vision from Digital StoreFront. For example, if all incoming Web orders are put on hold, you are forced to review them and change their status before the jobs can be produced.

1. In PrintSmith Vision, select **Admin > Web Administration** and click the **Administration** tab.
2. In the **Receive State** field, select a hold state. (These are defined in the Hold State table.) When an order comes in from Digital StoreFront, it is assigned this hold state.



3. *Ignore* the **Reject State** field; it is not used for Digital StoreFront integrations.
4. Close the Web Administration window and save the information when prompted.



## Task 11: Place a Test Order

Once you have some product and user links between the site and PrintSmith, EFI recommends you place a test order to make sure orders are being placed as expected and the status of orders is being updated in Digital StoreFront.

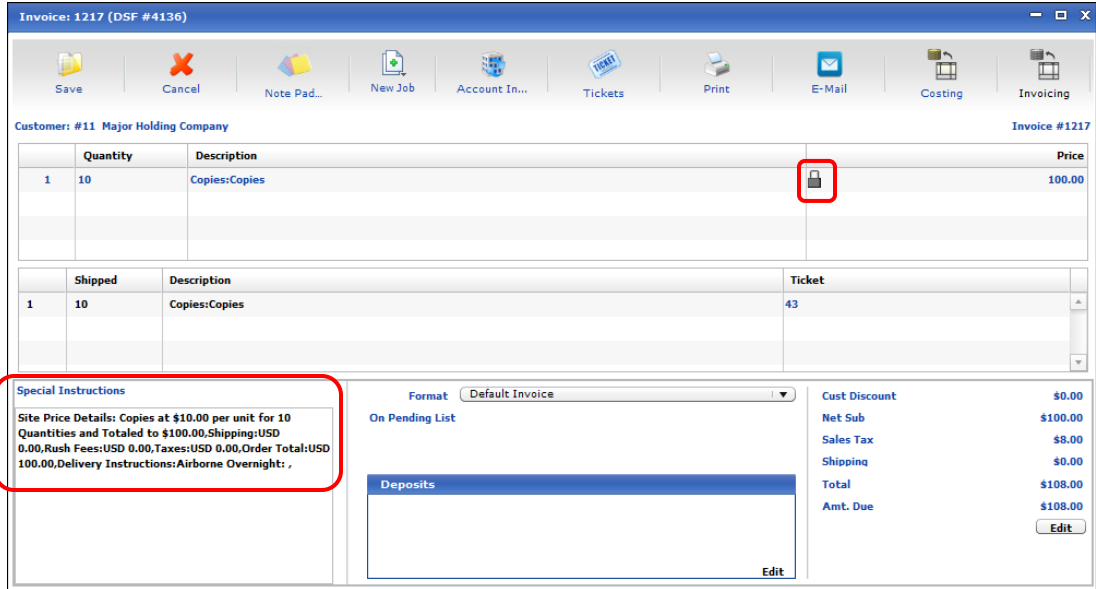
1. Log into the Digital StoreFront site as an administrator *who is linked to a contact in PrintSmith Vision*.
2. Place an order for a product *that is linked to a product in PrintSmith Vision*. (A static product makes a good test case because it is simple to order.)
3. In PrintSmith Vision, open the Pending Documents window. Orders from the site are identified with a globe icon. The invoice for your order should be listed. The name of the product on the site is automatically used for the document title.

**Tips** PrintSmith Vision checks every five minutes for incoming orders so you may experience a slight delay if you open the Pending Documents window immediately after placing your test order. To force a check sooner, go to the Integration preferences and click **Check Now**.

To include the order number that was assigned on the Digital StoreFront site in the Pending Documents window, set your pending list preferences (**Admin > Preferences > POS > Pending List**) to include the **Web Reference** column.

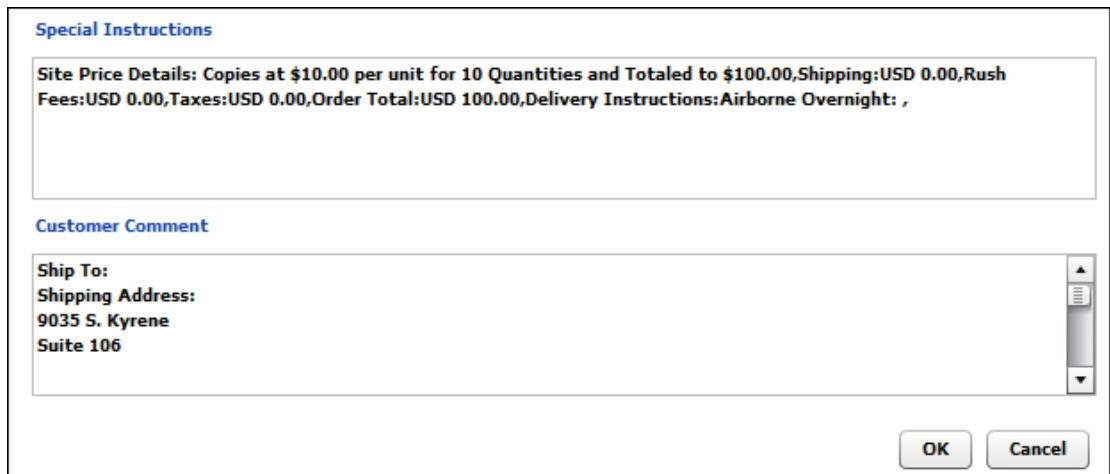
Pending Documents						
	Pick Up	Account	Document No.	Document Title	Wanted Date	Web Reference
<input type="radio"/>	Status	 Major Holding C 1217	1217	Copies:Copies	6/23/2015 12:3...	4136 (DSF)
<input type="radio"/>	Location	 Major Holding C 1216	1216	NPP:NPP	6/23/2015 12:3...	4135 (DSF)

4. Open the invoice for the order you just placed. Notice the following:
  - The Digital StoreFront order number is shown after the invoice number in the window title bar.
  - All the pricing is locked in the invoice.
  - The **Special Instructions** field shows pricing information and the delivery method.



**Tip** You can also use **Invoice > Review Any Document** to open an invoice if you know its Digital StoreFront order number.

5. Review the account information by clicking **Account Info** on the toolbar in the Invoice window. (Alternatively, select **Invoice > Account Info**). Notice the following:
  - The **Wanted by** date is the due date specified on the site when the order was placed.
  - The **Special Instructions** field shows pricing and the delivery method (the same as in the invoice); the **Customer Comment** field shows shipping information, billing information, and the payment method.



- In the Invoice window, open the job by double-clicking it. The Job window and the Web Worksheet window open. The contents of the Web Worksheet window depend on the product that was ordered. For a print order, you see all the product specifications, including the URL to the content file for the order as shown below. All this information can be copied to the job ticket. For more information about the Web Worksheet, see page 38.

Web WorkSheet	
Check off items that you've added to the job or move an item to job ticket notes by clicking item description and clicking the 'Copy' button. Checked off items are deleted when OK is clicked.	
Done	Description
<input type="checkbox"/>	Product "Merchandise", PS-SKU-1
<input type="checkbox"/>	Print In Color/Sides : Print in Color, Double Sided
<input type="checkbox"/>	Media : Standard White,White,US Letter,White
<input type="checkbox"/>	Scale to Fit : Standard White,White,US Letter,Bond (20 pound)/ 75 gsm:Scale to Fit:False
<input type="checkbox"/>	Price adjusted by "-110.00" to match published WEB price
<input type="checkbox"/>	file: <a href="http://shirleyf-vs2012/rany/PreviewPdf.ashx?FileId=te_T%25eBnYKCo-&amp;SITEGUID=4c6bcdfe-0907-4f12-bb19-eb1585e026c8&amp;SITEGUID=4c6bcdfe-0907-4f12-bb19-eb1585e026c8&amp;WMK=-1&amp;ULR=False">http://shirleyf-vs2012/rany/PreviewPdf.ashx?FileId=te_T%25eBnYKCo-&amp;SITEGUID=4c6bcdfe-0907-4f12-bb19-eb1585e026c8&amp;SITEGUID=4c6bcdfe-0907-4f12-bb19-eb1585e026c8&amp;WMK=-1&amp;ULR=False</a>

**Note** In the case of a real order, you would now produce the job as usual.

When the order is placed in Digital StoreFront, its status in the Order View is **User accepted**. If a production location is selected in PrintSmith Vision, the order status in Digital StoreFront changes to **In Production**.

- Select any production location for the job. (You can do this by clicking **Location** in the Pending Documents window, by using a bar code scanner, by editing the job, or by editing the delivery ticket.)
- Open the Order View in Digital StoreFront and locate the order (by its Digital StoreFront order number). Its status should now be **In Production**.

 <a href="#">4136</a> Danney Rogers	Status: <a href="#">In Production</a>
Due: 6/23/2015 12:30 PM	Quote: <a href="#">\$100.00</a>

9. Mark the invoice as ready for pickup:
  - a. In the Pending Documents window, select the invoice and click **Location**.
  - b. Select the **Ready for pickup/delivery** check box.
  - c. Click **OK**.

The screenshot shows a dialog box titled "Location" with a close button (X) in the top right corner. The content includes:  
- Invoice: 1217 Copies:Copies  
- (#11) Major Holding Company  
- Jobs(1): 1: Copies:Copies @ Running - Copy (dropdown)  
- Document Location: Running - Copy (text field)  
- Job Location: Running - Copy (dropdown)  
- Comment: (empty text area)  
- Hold State: (dropdown menu)  
- A red box highlights the checked checkbox "Ready for pickup/delivery" under the Hold State section.  
- Buttons for "OK" and "Cancel" are at the bottom.

- d. Go to the Order View in Digital StoreFront and locate the order. Its status is now **Shipped**, meaning it is complete. The order amount remains the same; any changes made in PrintSmith Vision are *not* reflected here. (Credit card orders are the exception; see page 43.)

**Tip** For more information about status updates, see "What Gets Updated in Digital StoreFront?" on page 42.



## Upgrading from PrintSmith Classic 8.1

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## Overview

If you were already using Digital StoreFront with PrintSmith Classic, and are now planning to upgrade to PrintSmith Vision, you must perform the upgrade in a certain sequence and keep timing in mind to maintain a smooth transition of your integration with Digital StoreFront.

After you complete the upgrade, orders can start flowing from Digital StoreFront to PrintSmith Vision. The links between products in PrintSmith and Digital StoreFront will still be in place, as will the links between PrintSmith Vision contacts and Digital StoreFront users.

The main tasks you must complete in an upgrade are:

1. Contact EFI Support. Support must run the enhanced integration script on your Digital StoreFront database to ensure the two-way integration between PrintSmith Vision and Digital StoreFront works correctly.
2. In Digital StoreFront, change the MIS to PrintSmith Vision (this breaks the connection with PrintSmith Classic).
3. If you plan to offer digital downloads or direct mail products on the site, define some print shop settings.
4. Export your data from PrintSmith 8.1, install PrintSmith Vision, and import the data.
5. Set integration preferences in PrintSmith Vision to connect it to Digital StoreFront.

**Important** Review the detailed upgrade instructions below *before* you start the process. The timing of some steps is important to a successful upgrade.

## Task 1: Contact PrintSmith Support

- Contact PrintSmith Support as described on page 7.

Support must run the enhanced integration script on your Digital StoreFront database for the two-way integration with PrintSmith Vision to work. (This applies whether your Digital StoreFront installation is EFI-hosted or self-hosted.)

*Do not omit this step.*

**Important** If you are self-hosted, you must have Digital StoreFront v. **8.4** installed.

## Task 2: Change the MIS to PrintSmith Vision

Currently, the MIS you have defined in Digital StoreFront is for PrintSmith Classic. Start by changing this to PrintSmith Vision.

**Important** This step breaks the connection between Digital StoreFront and PrintSmith Classic. No more orders will flow through to PrintSmith Classic. Orders placed after this will be held in a queue until the integration with PrintSmith Vision is complete. You may not want to complete this task until you are ready to complete all the additional tasks involved in the upgrade to PrintSmith Vision.

1. Log into Digital StoreFront as an administrator.
2. Go to **Administration > MIS CONFIGURATION > MIS Systems**.
3. Locate your PrintSmith Classic MIS and click its name.

**Caution** Do *not* add a new MIS for PrintSmith Vision. If you do so, all your links between users in Digital StoreFront and contacts in PrintSmith will be lost, and you will have to re-create them.

4. On the MIS Systems page:
  - a. In the **MIS Type** field, change the **MIS Type** to **PrintSmith Vision** and enter a descriptive **Name** for the MIS.
  - b. Select the **Basic Integration** check box.
  - c. Select the **Enable Order Requests** check box.
  - d. *Ignore* the **URL or Network Location** field; it does not apply to PrintSmith Vision.

MIS Type:	EFI PrintSmith Visior ▾	<input checked="" type="checkbox"/> Basic Integration
Name:	DVIT	
Enable Order Requests:	<input checked="" type="checkbox"/>	
URL or Network Location:		

- e. Click **Save**.

The system now completes all the fields under **Request Order Connectivity Info**. You will need the information in these six fields when you set your integration preferences in PrintSmith Vision as described in Task 5 below.

### Task 3: Define Some Print Shop Settings

If you plan to offer digital downloads of products or direct mail products on your site, you must configure some default shipping methods for the print shop that is associated with your PrintSmith Vision MIS. When buyers order a digital download or direct mail product, no shipping information is required in the cart. When the order is sent to the PrintSmith Vision, however, a delivery method is required (even if it does not apply to the type of product being ordered). To support this, you must map three default shipping methods to delivery methods that are available for this purpose in Digital StoreFront.

**Note** Direct mail products and the print shop settings described here were introduced in Digital StoreFront v. 7.6.

1. In Digital StoreFront, open the print shop associated with your MIS.
2. Follow the instructions in step 4 under “Task 5: Associate MIS with Print Shop and Define Print Shop Settings” on page 12.

### Task 4: Upgrade to PrintSmith Vision

Next you must export your data from PrintSmith Classic 8.1, install PrintSmith Vision, and import your data.

- Follow the instructions in the “Upgrading from PrintSmith Classic to PrintSmith Vision” chapter of the *PrintSmith Vision Installation and Upgrade Guide*.

### Task 5: Set Integration Preferences

The final step is to set the Integration preferences in PrintSmith Vision to establish a connection with Digital StoreFront.

- Follow the instructions in “Task 6: Set Integration Preferences to Establish a Connection” on page 14.

### Next Steps

Orders will now start coming into PrintSmith Vision. *While the workflow is very similar to what it was in PrintSmith 8.1, there are a few differences.* In particular, the status of orders is now updated in Digital StoreFront when certain events occur in PrintSmith Vision. Review the procedures in the “Order Workflow” chapter that begins on page 33 to make sure you understand the changes.



# Updating a PrintSmith Vision-Digital StoreFront Integration

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## Overview

If you were integrated with Digital StoreFront using an earlier version of PrintSmith Vision (pre-3.0), you must update your integration in order to take advantage of the new two-way communication between PrintSmith Vision and Digital StoreFront introduced in PrintSmith Vision 3.0.

The enhanced integration requires PrintSmith Vision 3.0 and Digital StoreFront 8.4. If you self-host Digital StoreFront, make sure you update your installation to version 8.4.

You must complete two tasks to update your integration:

1. Contact PrintSmith Support. Support must run the enhanced integration script on your Digital StoreFront database to ensure the two-way integration works correctly. (This applies whether your Digital StoreFront installation is EFI-hosted or self-hosted.)
2. Update your PrintSmith Vision Integration preferences to allow two-way communication between PrintSmith Vision and Digital StoreFront.

**Note** If you choose not to complete these tasks, your integration will continue to be one-way only – no status information will be sent from PrintSmith to Digital StoreFront.

## Task 1: Contact PrintSmith Support

- Contact PrintSmith Support as described on page 7.

Support must run the enhanced integration script on your Digital StoreFront database for the two-way integration with PrintSmith Vision to work. (This applies whether your Digital StoreFront installation is EFI-hosted or self-hosted.)

*Do not omit this step.*

**Important** If you are self-hosted, you must have Digital StoreFront v. **8.4** installed.

## Task 2: Update Your PrintSmith Vision Integration Preferences

After the enhanced integration script is run on your Digital StoreFront database, the MIS Systems page for your MIS includes two new fields: **Site callback Url** and **Routing Identifier**. The **Site callback Url** field is filled in automatically, but you must manually enter a **Routing Identifier**.

The screenshot shows the 'MIS Systems' page with a 'Connectivity' tab selected. The 'MIS Type' is set to 'EFI PrintSmith Vision' and 'Basic Integration' is checked. The 'Name' field contains 'Vision'. 'Enable Order Requests' is checked. The 'URL or Network Location' field is empty. Under 'Request Order Connectivity Info', the 'Web Service Url' is 'http://shirleyf-vs2012/rel82/WebServices/OrderInfoXml.aspx', 'Facility Name' is 'Vision', 'Shared Secret' is 'XNu8Xhvh', and 'Site Key' is 'Y9CM84(OVF)+C6Uc9WrtvFX0A='. The 'Site Callback Url' is 'http://shirleyf-vs2012:80/rel82/AsyncCommHandler.ashx?SITEGUID=4c6bcdfe-09...' and the 'Routing Identifier' is 'RID'. A red box highlights the 'Site Callback Url' and 'Routing Identifier' fields. At the bottom right, there are 'Test', 'Save', and 'Back' buttons.

1. In Digital StoreFront, in the **Routing Identifier** field on the MIS Systems page, enter any kind of identifier you want to use.
2. Copy the contents of the **Site callback Url** and **Routing Identifier** fields from Digital StoreFront to the corresponding fields in the PrintSmith Vision Integration preferences. (The **Site callback Url** field corresponds to the **Status Callback URL** field.)

**Tips** You can select the information in a field in Digital StoreFront and use Ctrl+C to copy it. Then use Ctrl+V to paste it into the corresponding field in PrintSmith Vision. (On a Mac, the Command key is equivalent to Ctrl on a Windows computer.)

To ensure you copy the entire URL in the **Site Callback Url** field, use Ctrl+A to select everything in the field and then use Ctrl+C to copy it.

<input checked="" type="checkbox"/> Enable DSF Integration	<input type="button" value="Reset"/>	<input type="button" value="Check Now"/>
Web Services URL	shirleyf-vs2012/rel82/WebServices/OrderInfoXml.asmx	
Facility Name	Vision	
Shared Secret	XNu8Xhvh	
Site Key	Y9CMR4/OYFJ+Cj6Uc9WtgtVFX0A=	
Status Callback URL	:SITEGUID=4c6bcdfe-0907-4f12-bb19-eb1585e026c8	
Routing Identifier	RID	

3. Click **Save**.
4. Click **Reset** to restart the connection between PrintSmith Vision and Digital StoreFront using the new settings.

**Note** You must click **Reset** to ensure that the status of orders is now updated in Digital StoreFront as certain events occur in PrintSmith Vision.

## Next Steps

Review the information in “What Gets Updated in Digital StoreFront?” on page 42 to understand the changes to the integration.





# Order Workflow

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## Overview

As orders are placed and paid for on the site, they are available for request by PrintSmith Vision. PrintSmith Vision requests orders every five minutes. When the orders come into PrintSmith Vision you can then process them.

What comes through to PrintSmith Vision depends on the order:

- If the order is for a product that is linked to a PrintSmith Vision product via a SKU, information about the job is automatically available from the template that was assigned to the product in PrintSmith Vision. Additional production information is sent from the site. For details, see “Orders for Products with SKUs” on page 40.
- If the order is for a product that is *not* linked to a PrintSmith Vision product, the order comes through as an outside service (buyout) job in PrintSmith Vision. In this case, all the production information comes from the site. For details, see “Orders for Products without SKUs” on page 41.
- If the order went through the manual quote system on the site (because a product had no pricing), how it comes through to PrintSmith Vision depends on whether the product had a SKU, as described above.
- If the order was placed by a buyer who was not linked to a contact in PrintSmith Vision, the order comes in as a walk-in order.

## General Workflow

As Digital StoreFront orders come into PrintSmith Vision you can process them.

1. Open the Pending Documents window. Orders from the site are identified with a globe icon. For more information about the Pending Documents window, see page 35.
2. Open the invoice for a Web order you just placed. Notice that the **Web reference number** (Digital StoreFront order number) is displayed in the title bar of the window, all the pricing is locked in the invoice, and the **Special Instructions** field shows pricing information for the order and the delivery method. For more information about the Invoice window, see page 36.
3. Review the account information by clicking **Account Info** on the toolbar of the Invoice window. The **Special Instructions** and **Customer Comment** fields provide information about the order that was placed. For more information about the Account Info window, see page 37.
4. In the Invoice window, double-click the job description. The Job window and the Web Worksheet window open. The Web Worksheet window includes production information that you typically use to correct the job specifications and to add information to the job ticket. The Web Worksheet also shows price adjustments. For information, see page 38.
5. Produce the job as usual and generate a delivery ticket. For information about delivery tickets, see page 40.
6. Pick up and post the invoice.

**Note** As certain events take place in PrintSmith Vision, the status of the order is updated in Digital StoreFront or the credit card gets charged for credit card orders. For information, see “What Gets Updated in Digital StoreFront?” on page 42.

## Orders for Products with SKUs

Web orders for products that are linked by SKU are all handled the same way regardless of the type of product involved. The only difference is that in some cases (especially for ad hoc products which are always different) you rely on information that comes from the site for the production specifications.

When a Web order comes into PrintSmith Vision, an invoice is created for it and is listed in the Pending Documents window. The invoices for Web orders are identified by a globe icon.

Information about Web orders is available in these places in PrintSmith Vision:

- Pending Documents window
- Invoice window
- Account Info window
- Web Worksheet window
- Delivery Ticket window

In addition, the Job window has job specifications based on the template that was defined for the product in PrintSmith Vision. (This template typically needs to be modified based on information provided from Digital StoreFront.)



The sections that follow explain the information that is available about Web orders coming from Digital StoreFront.

### Pending Documents window

Each order that is placed on the site has an invoice created for it in PrintSmith Vision and is listed as a Web order in the Pending Documents window. A globe icon identifies these orders. The name of the product on the site is automatically used for the document title.

**Tip** To see the order number that was assigned on the Digital StoreFront site, set your pending list preferences (**Admin > Preferences > POS > Pending List**) to include the **Web Reference** column in the Pending Documents window.

PrintSmith Vision sends a request for orders to Digital StoreFront every five minutes so you can expect updates to the pending list at those intervals. If **Document Type** in the Pending Documents window is set to **Web Orders**, a “throbber” is displayed whenever the request for orders is made. (You may not see this unless the request is being made while you are viewing the window.)

Pending Documents						
<input type="radio"/>	Pick Up	Account	Document No.	Document Title	Wanted Date	Web Reference
<input type="radio"/>	Status	 Major Holding C	1217	Copies:Copies	6/23/2015 12:3...	4136 (DSF)
<input type="radio"/>	Location	 Major Holding C	1216	NPP:NPP	6/23/2015 12:3...	4135 (DSF)

**Tips** If you want PrintSmith Vision to request orders right away, go to the Integration preferences in PrintSmith Vision and click **Check Now**.

If you select an order, click **Location**, and select a production location, the status of the order in Digital StoreFront is updated to **In Production**. For more information, see “Order status updates” on page 42.

## Invoice window

Open the invoice as usual. You can open it from the Pending Documents window or use **Invoice > Review Any Document**. When using **Invoice > Review Any Document**, you can either enter the invoice number or enter the Digital StoreFront order number to locate the invoice:

1. Select **Invoice > Review Any Document**.
2. Select **External ID** (DSF is selected automatically).
3. Enter the Digital StoreFront order number and click **OK**.

Note the following in the Invoice window:

- The title bar of the window includes the Digital StoreFront (DSF) order number.
  - The customer account is based on the contact (buyer) who placed the order.
- Note** If the buyer who placed the order was not associated with a contact in PrintSmith Vision, the order comes in as a walk-in order.
- The items listed in the invoice are based on the job template that was associated with the product in PrintSmith Vision (see page 16).
  - Pricing is locked because the price on the site *always* overrides the price in PrintSmith Vision. (The buyer has already paid this price.)

Pricing is locked

Quantity	Description	Price
1	10 Copies:Copies	100.00

**Special Instructions**  
 Site Price Details: Copies at \$10.00 per unit for 10 Quantities and Totaled to \$100.00.Shipping:USD 0.00,Rush Fees:USD 0.00,Taxes:USD 0.00,Order Total:USD 100.00,Delivery Instructions:Airborne Overnight: ,

Format	Cust Discount
Default Invoice	\$0.00
On Pending List	Net Sub \$100.00
	Sales Tax \$8.00
	Shipping \$0.00
	Total \$108.00
	Amt. Due \$108.00

- If more than one product was part of the order, each product is listed on the invoice.
- The **Special Instructions** field shows the total amount of the order calculated on the site, as well as a price breakdown (for example, shipping, taxes, or rush fees) and the delivery method that was selected.
- If shipping was calculated in Digital StoreFront, it is reflected on the **Shipping** line in the invoice totals. (No shipping was calculated for the sample order in the figure above.)
- If a rush fee was added in Digital Storefront, the rush fee is included in the invoice total. (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.)

**Note** In Digital StoreFront, a print shop can apply a handling fee. Handling fees, however, are *not* transmitted to PrintSmith Vision so are not part of the invoice total.

## Account Info window

When the Invoice window is open, click **Account Info** on the toolbar (or select **Invoice > Account Info**) to see additional details about the order. Note the following:

- The contact corresponding to the user who placed the order is automatically displayed.

**Note** The contact never changes, even if another account was used for payment on the site.

- The **Ordered on** and **Wanted by** fields are automatically filled in with dates from the order.

<b>Ordered on</b>	6/23/2015	12:30 PM	Tue
<b>Wanted by</b>	6/23/2015	12:30 PM	Tue <input type="checkbox"/> Firm wanted by date
<b>Deliver on</b>	6/23/2015	12:30 PM	Tue

- The **Special Instructions** field shows the total amount of the order calculated on the site, as well as a pricing breakdown (for example, shipping, taxes, or rush fees) and the delivery method that was selected. (The information here is the same as in the **Special Instructions** field on the invoice.)

<p><b>Special Instructions</b></p> <p>Site Price Details: Copies at \$10.00 per unit for 10 Quantities and Totaled to \$100.00,Shipping:USD 0.00,Rush Fees:USD 0.00,Taxes:USD 0.00,Order Total:USD 100.00,Delivery Instructions:Airborne Overnight: ,</p>
---

- The **Customer Comment** field provides the shipping address and billing address, PO number (if any), and the payment method. Be sure to scroll through the field to see all the information.

**Note** For information about credit card payments, see page 43.

<p><b>Customer Comment</b></p> <p>Ship To: Shipping Address: 9035 S. Kyrene Suite 106</p>
---

**Tip** If you want the **Taken by** field to provide some identifying information about how the order was placed, complete the **Taken by** field on the **Site** tab in the Web Administration window in PrintSmith Vision. For example, in this case **Taken by** was defined as **System** so that all orders that come from Digital StoreFront are taken by **System**.

<b>Taken by</b>	System
-----------------	--------

## Job and Web Worksheet windows

When a job is the result of a Web order, a Web worksheet is created for the job. This worksheet contains production information from the Web site about the order, for example, the media the buyer selected, as well as price adjustments. When you open a job by double-clicking it in the Invoice window, both the Job and Web Worksheet windows open automatically, with the Web worksheet on top.

**Tip** If you close the Web worksheet, you can always open it again by selecting **Web Worksheet** under **Commands** in the Job window.

The information in the Job window is based on the template you associated with the Web product in PrintSmith Vision.

**Note** Change the information in the Job window as necessary. For example, you select a different copier or press or change the stock selection based on what is in the Web worksheet.

The Web Worksheet window may include the following:

- Production specifications as selected by the buyer on the site, for example, print options such as media and binding. This information in the Web Worksheet window is particularly important for ad hoc products for which you typically have very generic job templates because an order for an ad hoc product is always different.
- URLs for the content files that were uploaded as part of the order on the site. You can copy the URL to the job ticket notes so this is available in the job ticket.
- A price adjustment indicating whether the price for the product on the site was higher or lower than that in PrintSmith Vision. A positive number indicates the price on the site was higher; a negative number indicates it was lower. You can use this information to adjust your pricing on either side in the future. (This price adjustment does *not* include shipping, tax, handling, and so on – those details are available in the **Special Instructions** field in the Invoice and Account Info windows.)

Done	Description
<input type="checkbox"/>	Product "B&W Copies", PS-SKU-1
<input type="checkbox"/>	Orientation : Portrait
<input type="checkbox"/>	Collate : Collate into Sets
<input type="checkbox"/>	Binding : Perfect Bind
<input type="checkbox"/>	Cutting : Cut in Half
<input type="checkbox"/>	Drill : No Drill
<input type="checkbox"/>	Fold : No Folding
<input type="checkbox"/>	Staple : No Stapling
<input type="checkbox"/>	Print In Color/Sides : Print in Color, Single Sided
<input type="checkbox"/>	Media : US Letter, 3-Hole Punch, White, US Letter, Paper (Generic)
<input type="checkbox"/>	Scale to Fit : US Letter, 3-Hole Punch, White, US Letter, Bond (20 pound) / 7:
<input type="checkbox"/>	Price adjusted by "50.25" to match published WEB price
<input type="checkbox"/>	file: <a href="http://dsfprintsmith/dsf/PreviewPdf.ashx?nKrnYtbjr8gIEHufpiFuAv">http://dsfprintsmith/dsf/PreviewPdf.ashx?nKrnYtbjr8gIEHufpiFuAv</a>

As you review the contents of the Web worksheet, EFI strongly recommends that you copy items to the job ticket so production staff are aware of them.

### To copy items from the Web worksheet to the job ticket

1. In the Web Worksheet window, *highlight* the items you want to copy (do *not* select the check boxes). Use Shift or Ctrl to highlight multiple items while clicking them.
2. Click **Copy**. The selected items now have the word **Copy** next to them.

Done	Description
<input type="checkbox"/>	Binding : Perfect Bind
<input type="checkbox"/> Copy	Cutting : Cut in Half
<input type="checkbox"/> Copy	Drill : No Drill
<input type="checkbox"/> Copy	Fold : No Folding
<input type="checkbox"/> Copy	Staple : No Stapling
<input type="checkbox"/> Copy	Scale to Fit : US Letter, 3-Hole Punch,White,US Letter,Bond (20 pound)/ 7:
<input type="checkbox"/> Copy	Price adjusted by "50.25" to match published WEB price
<input checked="" type="checkbox"/> Copy	file: http://dsfprintsmith/dsf/PreviewPdf.ashx?nKrnYtbjr8jXa3umVihcTr

3. Click **OK**. The selected items are removed from the Web worksheet and copied to the Job Ticket Notes window where you can click **OK** to add them to the job ticket.

Enter special instructions for Job Ticket

Orientation : Portrait

Collate : Collate into Sets

Print In Color/Sides : Print In Black and White, Double Sided

## Delivery Ticket Window

When generating a delivery ticket for an order that originated in Digital StoreFront, always check the shipping information that is available in the **Customer Comment** field in the Account Info window to make sure it matches what is on the **Deliver Where** tab in the Delivery Ticket window.

Also check the delivery method the buyer selected to make sure the information on the **Deliver How** tab is correct.

**Note** When all the jobs are marked as **Delivered** on the **Status** tab of the Delivery Ticket window, the status of the order in Digital StoreFront changes to **Shipped**. For more information, see “Order status updates” on page 42.



## Orders for Products without SKUs

When an order is placed for a product on the site that is *not* linked to a PrintSmith Vision product by SKU, the order comes through as an outside service (buyout) job in PrintSmith Vision. In this case, *all* the production information comes from the site.

An invoice for the order is still created, and the Account Info window includes the same type of information as for products with SKUs (see page 37).

The invoice includes an outside service job for the product that was ordered.

**Note** Depending how your pricing methods are set up (in your Pricing Methods preferences), the job may be categorized as merchandise, mailing, or outside service.

The Web Worksheet window includes production specifications (if any) and a price adjustment. Since in this case there is no product pricing available in PrintSmith Vision, the “adjustment” is the actual price the buyer paid for the product on the site. For example, for a non-printed product (like an order for pens), only a price adjustment is included, but for other products that are defined just in Digital StoreFront production specifications may be included.

**Tip** The total price of the order (including shipping, taxes, and so on) is available in the **Special Instructions** field in the Invoice and Account Info windows. The adjustment is just for the product.

Done	Description
<input type="checkbox"/>	Price adjusted by "75.00" to match published WEB price

## Completing the Process in PrintSmith Vision

When the job is completed in PrintSmith Vision, you should pick up and post the invoice as usual.

## What Gets Updated in Digital StoreFront?

As orders are processed in PrintSmith Vision, some status information is sent to Digital StoreFront. In addition, for credit card orders, PrintSmith Vision lets Digital StoreFront know when to charge the credit card and what the final charge amount should be.


### Order status updates

Certain events in PrintSmith Vision result in the status of orders being updated in Digital StoreFront.

#### Selecting a production location

If you select a production location for an order using any of the available methods in PrintSmith Vision, the status of an order in the Order View in Digital StoreFront changes to **In Production**.

**Tip** You can select a production location by using a bar code scanner, clicking **Location** in the Pending Documents window, or selecting a location in the Job or Delivery Ticket windows. In addition, if you use Tracker, the location is updated when you start or stop a job.

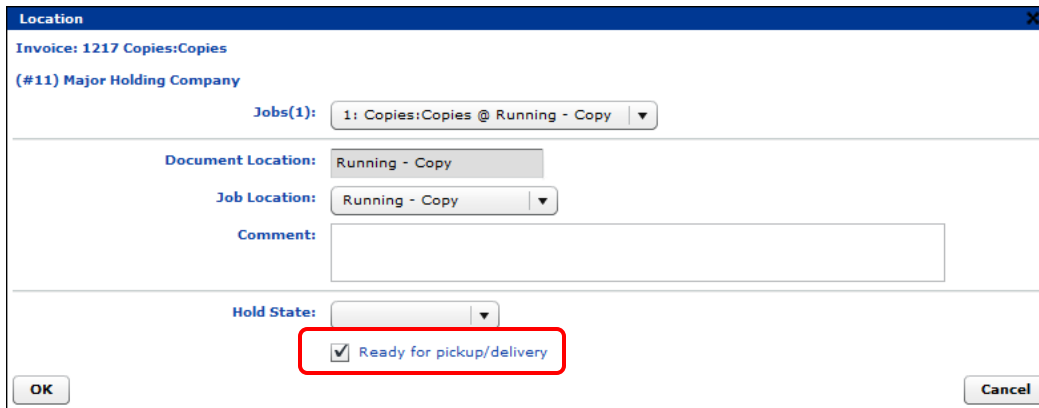
	<u>4148</u> Danney Rogers	Status: <b>In Production</b>
	Due: 6/5/2015 12:00 PM	Quote: <b>\$22.40</b>

**Notes** Digital StoreFront does not distinguish among different production locations in PrintSmith Vision. For example, if you first select Design as the location, the status of the order in Digital StoreFront changes to **In Production**. If you later select Bindery as the location, the order status in Digital StoreFront remains **In Production**.

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**). For example, if this is set to **Changing status of FIRST job**, when you first select a location in PrintSmith for *any* job in the order, the status changes to **In Production**. If this is set to **Changing status of LAST job**, *all* jobs in the order must have a location selected in PrintSmith before the status changes to **In Production**.

#### Marking an invoice as ready for pickup

When an invoice in PrintSmith Vision is marked ready for pickup, the status of the order in Digital StoreFront changes to **Shipped**, meaning the order is now complete.



*Except* for credit card orders (see page 43), if the payment amount in PrintSmith Vision changed, this will *not* be reflected in Digital StoreFront.

	<u>4148</u> Danney Rogers	Status: <b>Shipped</b>
	Due: 6/5/2015 12:00 PM	Quote: <b>\$22.40</b>


**Note** If you use both Scheduler and Tracker, in PrintSmith Vision you can configure a cost center to **Mark INV ready for pickup** when a task in that cost center is stopped in Tracker. In this case, users are asked if they want to mark the invoice as ready for pickup. If they click **Yes**, the status of the order in Digital StoreFront changes to **Shipped**.

### Marking jobs as delivered

When all the jobs in an order are marked as **Delivered** on the **Status** tab of the Delivery Ticket window, the status of the order in Digital StoreFront changes to **Shipped**.

### Canceling an invoice

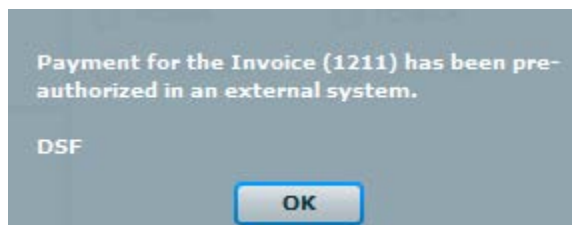
If you cancel an invoice in PrintSmith Vision (**Invoice > Cancel Document**) *before* marking it ready for pickup, the status of the order in Digital StoreFront changes to **Canceled**. (You cannot cancel a shipped order in Digital StoreFront.)

	4147 Danney Rogers	Status: <b>Canceled</b>
	Due: 6/4/2015 7:30 PM	Quote: \$2.24

### Credit card workflow

When buyers pay for an order with a credit card, the workflow is as follows:

1. Digital StoreFront contacts a payment gateway (configured in Digital StoreFront) to authorize the credit card payment, but the credit card is not charged now.
2. When the invoice is marked ready for pick up in PrintSmith Vision, the status of the order in Digital StoreFront changes to **Shipped**, but the card is not charged yet.
3. When you pick up the invoice, a message alerts you that payment was preauthorized in an external system (DSF for Digital StoreFront).



4. After you click **OK** in response to the message and then post the invoice, the credit card is now charged the final invoice amount (as calculated in PrintSmith Vision).

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

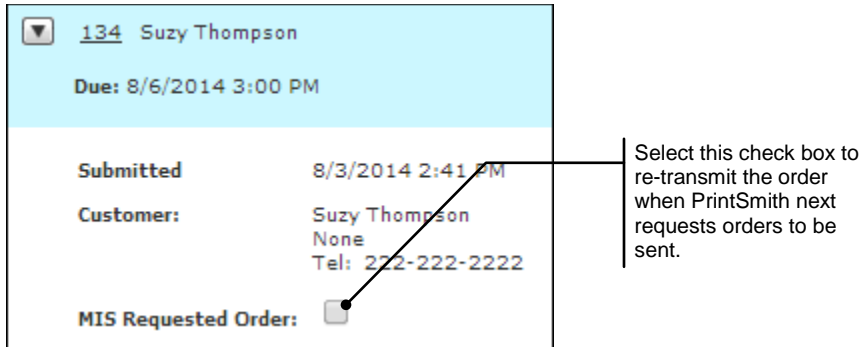
Credit cards in Digital StoreFront must be configured to add a percentage – often 25% – to the amount in the shopping cart when a credit card is authorized. This is standard industry practice to cover additional costs such as taxes. The authorized amount is not the amount that is ultimately charged to the credit card. The buffer is necessary, however, because the card is charged the amount calculated by PrintSmith, which is likely to be higher than the original order amount (due to taxes, shipping, and so on.)

If you need to cancel order after posting the invoice, you must reverse the credit card payment manually (either in Digital StoreFront or on the payment gateway).

## If Orders Need to Be Resubmitted to PrintSmith Vision

After it receives a request for orders from PrintSmith, Digital StoreFront sends the order XML files to PrintSmith and marks the orders as delivered. *This is a one-time delivery.*

If an order fails to reach PrintSmith Vision (for example, due to network issues) you can go to the Order View in Digital StoreFront, locate the order, expand the details, and select the **MIS Requested Order** check box. (You cannot resubmit an order if it reached PrintSmith Vision.)



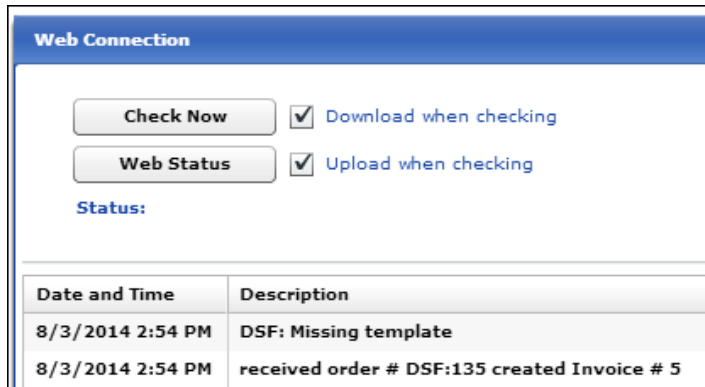
The next time PrintSmith Vision requests orders, the order will be re-transmitted.

**Tip** To order the same product again, a buyer would re-order it in Digital StoreFront. This results in a new order coming into PrintSmith Vision.

## Troubleshooting

Orders that are received from Digital StoreFront are recorded in the Web Connection window. You can check this window for information about orders. For example, this window will confirm an order was received or indicate that an order came in without a template.

- In PrintSmith Vision, select **Admin > Web Administration**, click the **Admin** tab, and click **Show Web Connection**.



Date and Time	Description
8/3/2014 2:54 PM	DSF: Missing template
8/3/2014 2:54 PM	received order # DSF:135 created Invoice # 5

If you encounter a problem with an order coming in, you may need to contact EFI Support and use the current day's history in the Integration preferences to analyze the XML information for the orders that came into PrintSmith Vision. (Order information is in XML format.)

- If advised by EFI Support, open the Integration preferences and click **History**.

History	
Date/Time	XML Info
Sun Aug 3 20:06:16 GMT- 0400 2014	<?xml version="1.0" encoding="utf-8"?><soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:wsa="http://schemas.xmlsoap.org/ws/2004/03/addressing" xmlns:wss="http://docs.oasis-open.org/wss/2004/01/oasis-200401- wss-wssecurity-secext-1.0.xsd" xmlns:wsu="http://docs.oasis-open.org/wss/2004/01/oasis-200401-wss-wssecurity-utility- 1.0.xsd"><soap:Header><wsa:Action>http://www.efi.com/dsf/DataRequestServices/RequestNewOrderResponse</wsa:Action><wsa:Message ID>uuid:307382f4-adf7-4d70-9331-ea870a8eeeb5</wsa:MessageID><wsa:RelatesTo>uuid:0573120d-3ef6-40ee-b6ae- 2744570e2a84</wsa:RelatesTo><wsa:To>http://schemas.xmlsoap.org/ws/2004/03/addressing/role/anonymous</wsa:To><wsse:Security> <wsu:Timestamp wsu:Id="Timestamp-eccadd1b-931c-4456-ade7-e521dcac253c"><wsu:Created>2014-08- 04T00:06:16Z</wsu:Created><wsu:Expires>2014-08- 04T00:11:16Z</wsu:Expires></wsu:Timestamp></wsse:Security></soap:Header><soap:Body><RequestNewOrderResponse xmlns="http://www.efi.com/dsf/DataRequestServices"><RequestNewOrderResult>&lt;?xml version="1.0" encoding="utf-16"?&gt;&lt;POD xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns="com.efi.network.ps.pwa"&gt;&lt;PORTALSOURCE&gt;DSF&lt;/PORTALSOURCE&gt;&lt;PORTALDESTINATION&gt;PS&lt;/PORTALDESTINAT ION&gt;&lt;VERSION&gt;1.8&lt;/VERSION&gt;&lt;ORDERSVCRQ&gt;&lt;ORDERMGMTSVCRQ&gt;&lt;ACTION&gt;ORDER&lt;/ACTION&gt;&lt;TRANS ACTIONID&gt;d4e6082-15c3-4c75-b291- b2d63fce252e&lt;/TRANSACTIONID&gt;&lt;ORDERID&gt;140&lt;/ORDERID&gt;&lt;REFERENCEID&gt;140&lt;/REFERENCEID&gt;&lt;EXPECTEDDATE &gt;1407544200000&lt;/EXPECTEDDATE&gt;&lt;SHIPMENTNOTES&gt;Site Price Details: Promotional Pens at \$5.00 per unit for 10 Quantities and Totaled to \$50.00,Shipping:USD 0.00,Rush Fees:USD 0.00,Taxes:USD 0.00,Order Total:USD 50.00,Delivery Instructions:Customer Pick- Up,&lt;/SHIPMENTNOTES&gt;&lt;COMMENTS&gt;Shipping Address: 1 Main St Bldg 3 Suite 101 Norwich

This provides a record of all the incoming orders for the current day.



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