Four51 Integration Guide

PrintSmith Vision
Version 3.1

October / 2015

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Introduction

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PrintSmith Vision and Four51

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

Four51 OrderCloud™ is an e-commerce solution allowing your customers (users) to order print products online. 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 Four51 work together. As orders are placed and paid for in Four51 OrderCloud, they are ready to be requested by PrintSmith Vision. After the orders come into PrintSmith Vision, the production workflow is then managed in PrintSmith Vision based on information included in the orders. The communication is one-way: information comes from Four51, but nothing is sent back to Four51 from PrintSmith Vision.

Note   Four51 integration is an optional PrintSmith Vision module that requires a license.

About this Guide

This guide explains how to set up PrintSmith Vision with Four51, what takes place when users 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 is already set up and you have a Four51 account and know how to use Four51. This guide focuses on how to integrate and use the two products. *It does not document Four51 procedures.*

Additional Sources

For information about	See
Installing PrintSmith Vision	*PrintSmith Vision Installation and Upgrade Guide*
Setting up and using PrintSmith Vision	*PrintSmith Vision Setup and User Guide*

If You Are Upgrading

If you were already using Four51 with PrintSmith Classic 8.1, and are upgrading to PrintSmith Vision:

- Follow the instructions in "Upgrading from PrintSmith Classic 8.1" starting on page 17.

- The procedures for handling Four51 orders are very similar to those in PrintSmith 8.1, but be sure review the information in the "Order Workflow" chapter starting on page 19 to understand the few differences.

If you are upgrading from PrintSmith Classic 8.1, and were *not* using Four51 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 Four51 starting on page 9 of this guide.

- Familiarize yourself with the order workflow. See page 19 of this guide.

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

Setup

In this chapter

Overview

Important	The instructions that follow apply to *new* integrations of PrintSmith Vision and Four51. If you were already using Four51 with PrintSmith Classic and are upgrading to PrintSmith Vision, see "Upgrading from PrintSmith Classic 8.1" starting on page 17.

The process of setting up PrintSmith Vision with Four51 involves these main tasks:

- Activate the license for Four51.

- Contact Four51 Support to ensure certain key preparations are completed to make the integration possible. (This is a critical step.)

- In PrintSmith Vision, specify integration preferences to establish a connection with Four51.

- Link products in PrintSmith Vision to products in Four51.

- Link contacts in PrintSmith Vision to users in Four51.

- (Optional) Define a "taken by" value.

- (Optional) Define a receive state for orders.

Note	The process of linking products and contacts/users is an ongoing activity. As you add new products in PrintSmith Vision that you want available in Four51, or as you add contacts to PrintSmith, you must establish new links between PrintSmith Vision and Four51.

Licensing

In order to use Four51 with PrintSmith Vision, you must have an activated license for Four51 integration.

If you are new to PrintSmith Vision and Four51, your Four51 license is activated when you activate your PrintSmith Vision license (as described in the *PrintSmith Vision Installation and Upgrade Guide*).

If you were previously using PrintSmith Vision, and now want to use Four51, contact PrintSmith.Sales@efi.com and purchase a license for Four51 integration. You will then need to *update* your license in PrintSmith Vision before you can integrate Four51 with PrintSmith Vision.

1. After you receive a confirmation e-mail from PrintSmith Sales, log into PrintSmith Vision.

2. Select **Help > About PrintSmith**.

3. Click **Update License**.

4. Click **Update** to activate the additional features you purchased.

Note	After you update your license, you must log out of PrintSmith Vision and log in again to see the newly activated features.

Task 1: Contact Four51 Support to Enable the Integration

The first step is to contact Four51 Support. Four51 Support will take care of certain critical tasks in Four51 to make the integration possible.

Do not omit this step.

Notes	If you have been using Four51 and now want to integrate it with PrintSmith Vision, you will need to inform Four51 Support of the starting date of orders you want pulled into PrintSmith Vision so that completed orders are archived (and not brought into PrintSmith Vision).
	If you were using PrintSmith Classic with Four51, and are upgrading to PrintSmith Vision, see "Upgrading from PrintSmith Classic 8.1" starting on page 17. In this case you must also work with Four51 Support to ensure a smooth migration.

To coordinate with Four51 Support

1. Contact Four51 Support so to enable the integration on the Four51 side.

2. If you are an existing Four51 user, *be sure* to inform Four51 Support of the starting date of orders you want pulled into PrintSmith Vision (i.e., how far back you want to go). You want to avoid having completed orders coming over to PrintSmith.

3. After Four51 Support informs you that the necessary preparations were done in Four51, continue to the next task to establish a connection between PrintSmith Vision and Four51.

Task 2: Set Integration Preferences to Establish a Connection

To establish the connection between PrintSmith Vision and Four51, you must copy some information from Four51 to some fields in the Integration preferences in PrintSmith Vision.

1. In Four51, go to **Admin > Web Services** and note the *shared secret* and the *site key* (the key follows **id=**). You will need to enter this information in PrintSmith Vision to connect the two systems.

2. In PrintSmith Vision, click **Preferences** in the QuickAccess panel (or select **Admin > Preferences**).

3. Under **System**, select **Integration**.

4. Select the **Enable Four51 Integration** check box.

5. Enter the **Shared Secret** and **Site Key** that you obtained in Four51.

6. Click **Save**.

7. *Log out of PrintSmith Vision and log back in.*

8. Open the Integration preferences again and check that the integration is working by clicking **Check Now**. You will receive a message that the connection was successful.

    If the connection fails, make sure you entered the correct **Shared Secret** and **Site Key** and click **Check Now** again.

Note	If for any reason you need to disable the integration altogether, click **Reset**. Doing so will clear the **Enable Four51 Integration** check box and the **Shared Secret** and **Site Key** fields.

Task 3: Link Products

Any PrintSmith Vision product that you want to be linked to a product in Four51 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 Four51.

Each Web product in PrintSmith Vision is assigned a unique SKU. To link the PrintSmith product to a product in Four51, you enter this SKU as the Interop ID for a product in Four51.

Important	This SKU linking is required only for products that you want defined in both PrintSmith Vision and Four51. You can set up other products (and pricing for those products) just in Four51, and orders for these kinds of products will come through as outside service jobs (buyouts) in PrintSmith Vision. For more information, see page 25.

About product pricing

Four51 and PrintSmith Vision use different approaches for pricing products so pricing will not necessarily match.

Note the following

- The pricing for products set in Four51 *always* overrides any pricing defined in PrintSmith Vision. When an order comes into PrintSmith Vision from Four51, the price is fixed since the user has already paid for the order. If you change any job specifications for a Four51 order in PrintSmith Vision (for example, select a different stock), the price remains unaffected.

- Whenever an order comes in from Four51, you can see (in the Web worksheet for the job) whether the price the user paid was higher or lower than the price in PrintSmith Vision.

- If a product is defined only in Four51 (is not matched by SKU to a PrintSmith Vision product), the price the user 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 Four51 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 Four51 are defined in the Web Administration window in PrintSmith. Each product must have a job template associated with it.

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 Four51, *unless* you are also using PrintSmith Site®.)

Important	If you are also using PrintSmith Site, many fields that are available on the **Products** tab do not apply to Four51. Only complete the fields described below.

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

Click to create a new product.
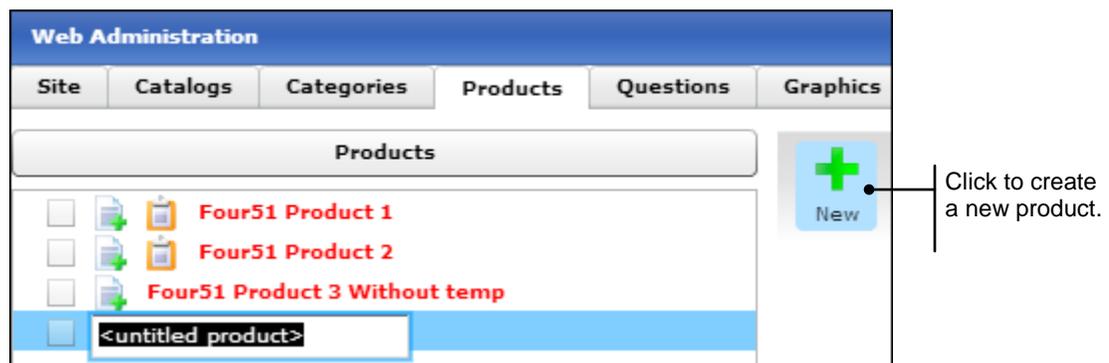
4. Enter a name for the product and press Tab.

> **Note** A unique SKU is automatically assigned to the product. You will need to enter it in Four51 as described in "Define and link products in Four51" below.

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.

6. Leave the **Description** field blank; the product name from Four51 serves as the description when the product is ordered. Also ignore the remaining fields on the **Products** tab.

7. Click **Save** on the toolbar.

8. Repeat steps 3 through 7 for all the products you want to offer in Four51.

> **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 and link products in Four51

Any product that was defined in PrintSmith Vision as a Web product must also be defined in Four51 and linked to the PrintSmith product by SKU. Either edit existing products in Four51 to link them to PrintSmith Vision products or create new products.

> **Note** Keep in mind you can also define products just in Four51 and not link them to Web products in PrintSmith Vision. These products then come in as outside services to PrintSmith Vision, with all the job specifications coming from Four51. For more information, see page 25.

- In Four51, go to the product settings and enter the SKU from PrintSmith Vision in the **Interop ID** field.

  Use the format **PS-SKU-*n*** where *n* is the SKU, for example, **PS-SKU-5**.

Task 4: Link Four51 Users to PrintSmith Vision Contacts

In Four51, users place orders. As part of the setup process, you link these users to the contacts for a customer account in PrintSmith Vision. Once these links exist, when users place orders, PrintSmith has all the necessary account information for the orders.

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.

To link a PrintSmith contact to a Four51 user

- In Four51, enter the PrintSmith contact ID in the **Interop ID** field for the user you are linking to the contact. For example, if the contact ID in PrintSmith is 2, you would enter 2 in the **Interop ID** field.

Note   If a user places an order on the site, and the user is *not* associated with a contact in PrintSmith Vision, the order comes in as a walk-in order. For information, see "Orders Placed by Users Without PrintSmith Contact IDs" on page 26.

Task 5: (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 Four51, 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 Four51; ignore the other fields.

2. In the **Taken by** field, enter any identifying information you want to use for orders coming in from Four51, for example, **System** or **Web**.

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

Task 6: (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 Four51. 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 Four51, it is assigned this hold state.

Receive State	Hold ▼	Reject State	▼

3. *Ignore* the **Reject State** field; it is not used for Four51 integrations.

4. Close the Web Administration window and *save* the information when prompted.

Task 7: Place a Test Order

Once you have some product and user links between Four51 and PrintSmith, EFI recommends you place a test order to make sure orders are being placed as expected.

1. Log into Four51 as a user *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*.

3. In PrintSmith Vision, open the Pending Documents window. Orders from Four51 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 include the Four51 order number in the Pending Documents window, set your pending list preferences (**Admin > Preferences > POS > Pending List**) to include the **Web Reference** column.

Pending Documents

		Account	Document No. ▲	Document Title	Wanted Date	Web Reference
○	Pick Up					
○	Status	🌐 BRITGAR M 158		Blank Cards 1	11/29/2014 1:3...	1022 (Four51)
○	Location	🌐 DAYS INN	159	Blank Cards 1	11/28/2014 1:3...	1023 (Four51)
○		🌐 DAYS INN	160	Wheeler BC-Pwr	11/24/2014 1:3...	1024 (Four51)

4. Open the invoice for the order you just placed. Notice the following:

    •   The Four51 order number is shown after the invoice number in the window title bar.

    •   The customer account is based on the user who placed the order. For example, if the Four51 user is linked to a contact for the Special Designs account in PrintSmith, the invoice is created for the Special Designs account.

    •   The job prices are locked in the invoice.

    •   The **Special Instructions** field provides shipping and payment information.
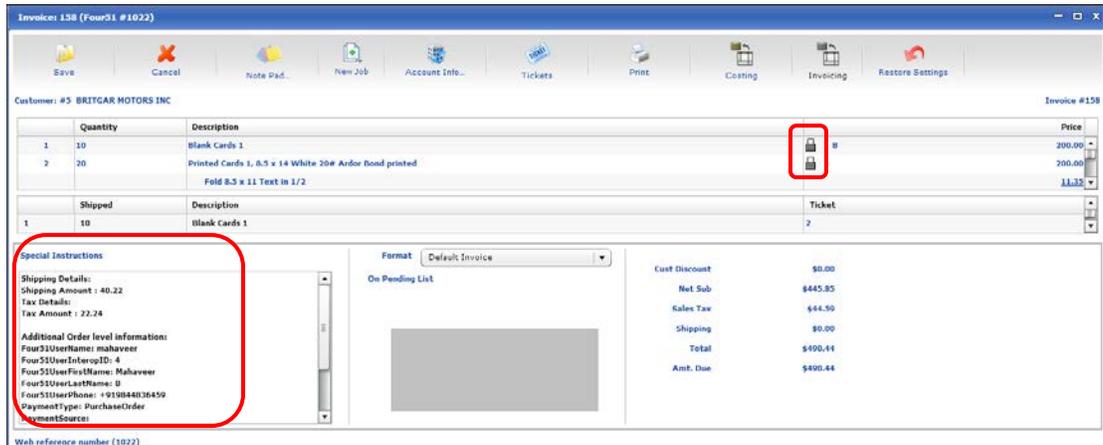
Tip	You can also use **Invoice > Review Any Document** to open an invoice if you know its Four51 order number.

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 in Four51 when the order was placed.

    •   The **Special Instructions** field shows shipping and payment information (the same as in the Invoice window); the **Customer Comment** field shows any comment that the user entered in Four51 (if any).

6. 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 this order, you can see the product specifications. This information can be copied to the job ticket. For information about the Web Worksheet, see page 23.
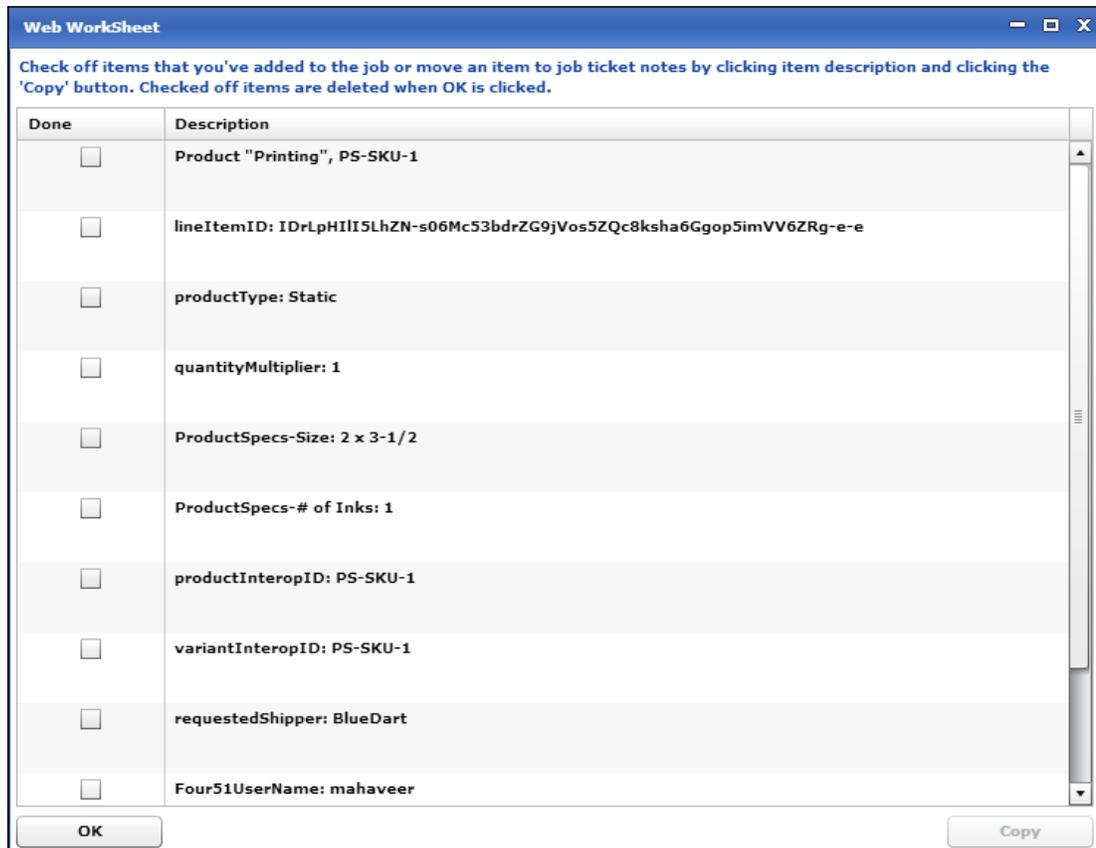
Done	Description
☐	Product "Printing", PS-SKU-1
☐	lineItemID: IDrLpHIlI5LhZN-s06Mc53bdrZG9jVos5ZQc8ksha6Ggop5imVV6ZRg-e-e
☐	productType: Static
☐	quantityMultiplier: 1
☐	ProductSpecs-Size: 2 x 3-1/2
☐	ProductSpecs-# of Inks: 1
☐	productInteropID: PS-SKU-1
☐	variantInteropID: PS-SKU-1
☐	requestedShipper: BlueDart
☐	Four51UserName: mahaveer

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.

OK   Copy

Note In the case of a real order, you would now produce the job as usual. After the job was complete, you would change the status of the order *in Four51*, and the user would be notified.

Upgrading from PrintSmith Classic 8.1

Overview

If you were already using Four51 with PrintSmith Classic, you can upgrade to PrintSmith Vision and continue to use Four51 (if you purchased a license for Four51).

Decide on the timing of the update – you must figure out when to stop Four 51 orders from going to PrintSmith Classic and start going to PrintSmith Vision instead. *This must be coordinated with Four51 Support.*

After you complete the upgrade, orders can start flowing from Four51 to PrintSmith Vision. The links between products in PrintSmith and Four51 will still be in place, as will the links between PrintSmith accounts and Four51 buyers.

Task 1: Upgrade to PrintSmith Vision

Export your data from PrintSmith Classic 8.1, install PrintSmith Vision, and import your data.

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

Task 2: Contact Four51 Support to transition from PrintSmith Classic

Important	Be sure to contact Four51 Support *before* you establish a connection between Vision and Four51 (as described in "Task 3: Establish connection between PrintSmith Vision and Four51" below).

If you were using Four51 with PrintSmith Classic, as part of the upgrade to PrintSmith Vision, you must contact Four51 Support and give them the date you no longer want Four51 orders sent to PrintSmith Classic.

- Contact Four51 Support and give them the date you no longer want Four51 orders sent to PrintSmith Classic.

Four51 Support will discuss the timing of the transition with you and then coordinate the necessary steps for breaking the connection to PrintSmith Classic.

Important	Only Four51 Support can complete this critical upgrade step.

Task 3: Establish connection between PrintSmith Vision and Four51

After the connection to PrintSmith Classic is broken (and this is confirmed by Four51 Support), the final step is to set the Integration preferences in PrintSmith Vision to establish a connection with Four 51.

1. Wait for EFI Support to inform you that the connection to PrintSmith Classic was broken.

2. Follow the instructions in "Task 2: Set Integration Preferences to Establish a Connection" on page 11.

Next steps

Four51 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.* Review the procedures in the chapter that follows to make sure you understand the changes.

Order Workflow

In this chapter

Overview

As orders are placed and paid for in Four51, 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 Four51. For details, see "Orders for Products with SKUs" on page 25.

- 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 Four51. For details, see "Orders for Products without SKUs" on page 25.

- If the order was placed by a Four51 user who is not linked to a contact in PrintSmith Vision, the order is assigned to the walk-in account. See "Orders Placed by Users Without PrintSmith Contact IDs" on page 26.

Important	The communication between Four51 and PrintSmith Vision is one-way: information comes from Four51 to PrintSmith Vision, but nothing is sent back to Four51 from PrintSmith Vision. So for example, once you complete the job, you must manually change the status of the order in Four51 so the user is notified.

General Workflow

As Four51 orders come into PrintSmith Vision you can process them.

1. Open the Pending Documents window. Orders from Four51 are identified with a globe icon. For more information about the Pending Documents window, see page 21.

2. Open the invoice for a Four51 order. Notice that the **Web reference number** (Four51 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 information about the Four51 order. For more information about the Invoice window, see page 22.

3. Review the account information by clicking **Account Info** on the toolbar of the Invoice window. The Account Info window also provides information about the order that was placed. For more information about the Account Info window, see page 23.

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 23.

5. Produce the job as usual and generate a delivery ticket. For information about delivery tickets, see page 25.

6. When the job is complete, *change the status of the order in Four51*. The user is then informed.

Note	The status *must* be changed manually in Four51 because PrintSmith Vision does not send any information to Four51.

Orders for Products with SKUs

Four51 orders for products that are linked by SKU are all handled the same way.

When a Four51 order comes into PrintSmith Vision, an invoice is created for it and is listed in the Pending Documents window. The invoices for Four51 orders are identified by a globe icon and the **Web Reference** column has **(Four51)** after the order number.

Information about Four51 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 Four51.)

The sections that follow explain the information that is available about Four51 orders.

Pending Documents window

Each order that is placed in Four51 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 Four51 product is automatically used for the document title.

Tip	To see the order number that was assigned in Four51, 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 Four51 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.)

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 Four51 order number to locate the invoice:

1. Select **Invoice > Review Any Document**.

2. Select **External ID** and then select **Four51**.

3. Enter the Four51 order number and click **OK**.

In the Invoice window, note the following:

Job pricing is locked.

- The title bar of the window includes the Four51 order number.

- The customer account is based on the contact (user) who placed the order.

  Note   If the user who placed the order is not associated with a contact in PrintSmith Vision, the invoice is created for the walk-in account. See page 26.

- The items listed in the invoice are based on the job template that was associated with the product in PrintSmith Vision (see page 12).

- Job pricing is locked because the price in Four51 *always* overrides the price in PrintSmith Vision. (The user has already paid this price.)

- 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, as well as a price breakdown (for example, shipping, taxes, or rush fees), shipping instructions, and payment information.

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 customer account is based on the user who placed the order. For example, if the Four51 user is linked to a contact for the Special Designs account in PrintSmith, the invoice is created for the Special Designs account

- The user who placed the order is created as a temporary contact for the invoice.

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

Ordered on	11/13/2014		8:45 PM	Thu
Wanted by	12/2/2014		1:30 PM	Tue
Deliver on	12/2/2014		1:30 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), shipping information, and payment information. (The information here is the same as in the **Special Instructions** field on the invoice.)

Special Instructions

Site Price Details: Brochure Copies at $50.43 per unit for 5 Quantities and Totaled to $252.15,Shipping:USD 0.00,Rush Fees:USD 0.00,Taxes:USD 0.00,Order Total:USD 252.15,Delivery Instructions:Customer Pick-Up:,

- The **Customer Comment** field shows any comments (if any) entered by the user who placed the order.

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 Four51 are taken by **System**.

Taken by	System

Job and Web Worksheet windows

When a job is the result of a Four51 order, a Web worksheet is created for the job. This worksheet contains production information from Four51 about the order, for example, print specifications, 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 may need to 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 user when purchasing the product, for example, size or number of inks.

- 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.
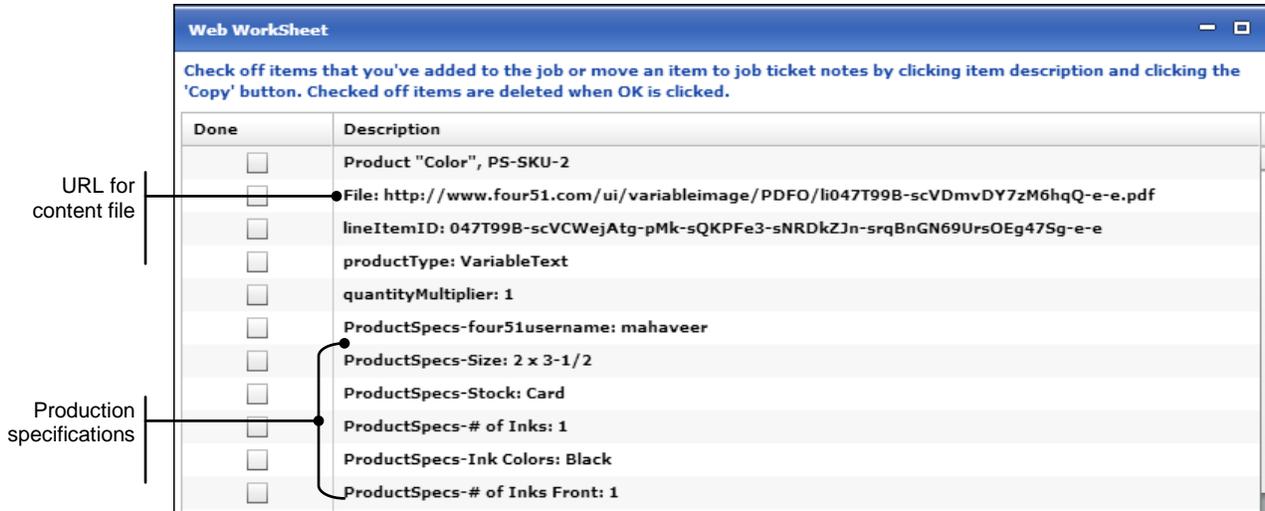
- A price adjustment indicating whether the price for the product on the site was higher or lower than that in PrintSmith Vision. A positive number indicates the price on the site was higher; a negative number indicates it was lower. You can use this information to adjust your pricing on either side in the future. (This price adjustment does *not* include shipping, tax, and so on – those details are available in the **Special Instructions** field in the Invoice and Account Info windows.)

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.

	Copy	ProductSpecs-Stock: Card
	Copy	ProductSpecs-# of Inks: 1
	Copy	ProductSpecs-Ink Colors: Black
	Copy	ProductSpecs-# of Inks Front: 1
	Copy	ProductSpecs-Ink Colors on Front: Black
	Copy	ProductSpecs-# of Inks Back: 1

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.

Job Ticket Notes

Enter special instructions for Job Ticket

ProductSpecs-Stock: Card

ProductSpecs-# of Inks: 1

ProductSpecs-Ink Colors: Black

ProductSpecs-# of Inks Front: 1

OK   Cancel

Delivery Ticket Window

When generating a delivery ticket for a Four51 order, always check the shipping information that is available in the **Special Instructions** field in the Invoice or 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 user selected to make sure the information on the **Deliver How** tab is correct.

Orders for Products without SKUs

When a Four51 order is placed for a product 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 23).

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

Note	Depending how your pricing methods are set up in PrintSmith Vision (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 user paid for the product on the site.

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.

Orders Placed by Users Without PrintSmith Contact IDs

When a user places an order, and is not linked to a PrintSmith Vision contact, the order comes into PrintSmith Vision assigned to the walk-in account.

🌐	WALK-IN	163	Blank Cards 1	11/29/2014 1:3...	1027 (Four51)

In this case, information about the user who placed the order is in the **Special Instructions** field in the Invoice window and Account Info window.

Completing the Process in PrintSmith Vision

When the job is completed in PrintSmith Vision, you should pick up the invoice as usual, using the information that was transmitted from Four51 about the total order amount and payment method.

Tip	The total order amount and payment methods are available in the **Special Instructions** field in the Invoice and Account Info windows.

Updating the Status of Orders

Because PrintSmith Vision does not send any information to Four51, you must manually change the status of orders in Four51 (especially when orders are complete) so users are notified. Users can also review their order history in Four51.

Troubleshooting

Orders that are received from Four51 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**.

Web Connection

Check Now	✓ Download when checking
Web Status	✓ Upload when checking

Status: idle

Date and Time	Description
11/18/2014 1:08 A	Four51: Missing template PS-SKU-3
11/18/2014 1:08 A	received order # Four51:1029 created Invoice # 171

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