

efi PrintSmith Vision™



SugarCRM® Integration Guide

PrintSmith™ Vision
Version 3.1

November / 2015

Copyright © 1997 - 2015 by Electronics for Imaging, Inc. All Rights Reserved.

EFI PrintSmith Vision | *SugarCRM Integration Guide*

November 2015 PrintSmith Vision 3.1

This publication is protected by copyright, and all rights are reserved. No part of it may be reproduced or transmitted in any form or by any means for any purpose without express prior written consent from Electronics for Imaging, Inc. Information in this document is subject to change without notice and does not represent a commitment on the part of Electronics for Imaging, Inc.

Patents

This product may be covered by one or more of the following U.S. Patents: 4,716,978, 4,828,056, 4,917,488, 4,941,038, 5,109,241, 5,170,182, 5,212,546, 5,260,878, 5,276,490, 5,278,599, 5,335,040, 5,343,311, 5,398,107, 5,424,754, 5,442,429, 5,459,560, 5,467,446, 5,506,946, 5,517,334, 5,537,516, 5,543,940, 5,553,200, 5,563,689, 5,565,960, 5,583,623, 5,596,416, 5,615,314, 5,619,624, 5,625,712, 5,640,228, 5,666,436, 5,745,657, 5,760,913, 5,799,232, 5,818,645, 5,835,788, 5,859,711, 5,867,179, 5,940,186, 5,959,867, 5,970,174, 5,982,937, 5,995,724, 6,002,795, 6,025,922, 6,035,103, 6,041,200, 6,065,041, 6,112,665, 6,116,707, 6,122,407, 6,134,018, 6,141,120, 6,166,821, 6,173,286, 6,185,335, 6,201,614, 6,215,562, 6,219,155, 6,219,659, 6,222,641, 6,224,048, 6,225,974, 6,226,419, 6,238,105, 6,239,895, 6,256,108, 6,269,190, 6,271,937, 6,278,901, 6,279,009, 6,289,122, 6,292,270, 6,299,063, 6,310,697, 6,321,133, 6,327,047, 6,327,050, 6,327,052, 6,330,071, 6,330,363, 6,331,899, 6,340,975, 6,341,017, 6,341,018, 6,341,307, 6,347,256, 6,348,978, 6,356,359, 6,366,918, 6,369,895, 6,381,036, 6,400,443, 6,429,949, 6,449,393, 6,476,927, 6,490,696, 6,501,565, 6,519,053, 6,539,323, 6,543,871, 6,546,364, 6,549,294, 6,549,300, 6,550,991, 6,552,815, 6,559,958, 6,572,293, 6,590,676, 6,606,165, 6,633,396, 6,636,326, 6,643,317, 6,647,149, 6,657,741, 6,662,199, 6,678,068, 6,707,563, 6,741,262, 6,748,471, 6,753,845, 6,757,436, 6,757,440, 6,778,700, 6,781,596, 6,816,276, 6,825,943, 6,832,865, 6,836,342, RE33,973, RE36,947, D341,131, D406,117, D416,550, D417,864, D419,185, D426,206, D439,851, D444,793.

Trademarks

The APPS logo, AutoCal, Auto-Count, Balance, Best, the Best logo, BESTColor, BioVu, BioWare, ColorPASS, Colorproof, ColorWise, Command WorkStation, CopyNet, Cretachrom, Cretaprint, the Cretaprint logo, Cretaprinter, Cretaroller, DockNet, Digital StoreFront, DirectSmile, DocBuilder, DocBuilder Pro, DocStream, DSFdesign Studio, Dynamic Wedge, EDOX, EFI, the EFI logo, Electronics For Imaging, Entrac, EPCount, EPPhoto, EPRegister, EPStatus, Estimate, ExpressPay, Fabrivu, Fast-4, Fiery, the Fiery logo, Fiery Driven, the Fiery Driven logo, Fiery JobFlow, Fiery JobMaster, Fiery Link, Fiery Prints, the Fiery Prints logo, Fiery Spark, FreeForm, Hagen, Inktensity, Inkware, Jetrion, the Jetrion logo, LapNet, Logic, MiniNet, Monarch, MicroPress, OneFlow, Pace, PhotoXposure, PressVu, Printcafe, PrinterSite, PrintFlow, PrintMe, the PrintMe logo, PrintSmith, PrintSmith Site, Printstream, Print to Win, Prograph, PSI, PSI Flexo, Radius, Rastek, the Rastek logo, Remoteproof, RIPChips, RIP-While-Print, Screenproof, SendMe, Sincolor, Splash, Spot-On, TrackNet, UltraPress, UltraTex, UltraVu, UV Series 50, VisualCal, VUTEK, the VUTEK logo, and WebTools are trademarks of Electronics For Imaging, Inc. and/or its wholly owned subsidiaries in the U.S. and/or certain other countries.

All other terms and product names may be trademarks or registered trademarks of their respective owners, and are hereby acknowledged.

Contents

Introduction	5
PrintSmith Vision and SugarCRM.....	6
About this Guide.....	6
Additional Sources	6
Contact Information	7
Setup	9
About Setup	10
Task 1: Contact PrintSmith Support to Set Up Your Sugar Site.....	10
Task 2: Activate CRM Licensing in PrintSmith Vision.....	10
Task 3: Establish a Connection Between PrintSmith Vision and Sugar.....	11
Task 4: Define CRM Users in PrintSmith Vision.....	12
Before you begin: make sure e-mail is configured in PrintSmith	12
Set up your CRM users.....	12
After a CRM user is created.....	13
Next Steps	14
Account and Contact Synchronization	15
Overview.....	16
Accounts	16
Account types.....	16
Account deletions.....	16
Master accounts.....	16
Synchronizing immediately	16
Mapping for accounts.....	17
Example of account mapping.....	18
Contacts	19
Contact deletions	19
Contact reassignments in Sugar	20
Synchronizing immediately	20
Mapping for contacts.....	20
Example of contact mapping.....	21



Introduction

In this chapter

PrintSmith Vision and Sugar	6
About this Guide	6
Additional Sources	6
Contact Information	7

PrintSmith Vision and SugarCRM

EFI PrintSmith™ Vision is integrated with SugarCRM® Professional.

PrintSmith is a complete print management system that automates a print or copy shop's estimating, production, and invoicing workflow. Customers, prospects, and contacts are part of this system.

Sugar Professional is a CRM system that lets you control and track your customer relationships to improve customer satisfaction as well as increase your sales. With Sugar you can manage your customers, contacts, and prospects; understand the markets your customers are in and what they buy; and track your interactions with customers. You can use the information provided by Sugar to market and sell your products more effectively.

When PrintSmith Vision and Sugar are integrated, information about customers, prospects, and contacts is synchronized between the two systems. When an addition or change is made in one system, it is reflected in the other system. For example, if a new customer is entered in Sugar, a customer is created in PrintSmith Vision, and vice versa.

Notes SugarCRM integration is an optional PrintSmith Vision module that requires a license for a particular number of CRM users.

Sugar is hosted by EFI – you access Sugar via a browser.

About this Guide

This guide explains how to configure PrintSmith Vision with Sugar, and how customers and contacts are synchronized.

The guide assumes that PrintSmith Vision is already set up and that you have purchased a license for the Sugar integration. This guide focuses on how to integrate the two products and understand how customer data is synchronized. *It does not document Sugar procedures. For Sugar procedures, refer to the online documentation provided by Sugar.*

Additional Sources

For information about	See
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 Sugar	Sugar online documentation (available while using Sugar)

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

About Setup	10
Task 1: Contact PrintSmith Support to Set Up Your Sugar Site	10
Task 2: Activate CRM Licensing in PrintSmith Vision	10
Task 3: Establish a Connection Between PrintSmith Vision and Sugar	11
Task 4: Define CRM Users in PrintSmith Vision	12
Next Steps	14

About Setup

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

- Contact PrintSmith Support to set up your Sugar site.
- In PrintSmith Vision, activate the license for Sugar.
- In PrintSmith Vision, establish a connection with Sugar.
- In PrintSmith Vision, define your CRM users. (These are the users who will be able to use Sugar.)

Details of these tasks follow.

Task 1: Contact PrintSmith Support to Set Up Your Sugar Site

After you purchase a license to use Sugar with PrintSmith Vision:

- Contact PrintSmith Support (for contact information, see page 7).

PrintSmith Support will:

1. Discuss the timeline with you.
2. Set up your Sugar site. This is hosted for you by EFI.
3. After the site is set up, give you the URL to the site so you can enter it in PrintSmith Vision as described in “Task 3: Establish a Connection Between PrintSmith Vision and Sugar” on page 11.

Task 2: Activate CRM Licensing in PrintSmith Vision

In order to use Sugar with PrintSmith Vision, you must have an activated license for a set number of Sugar CRM users.

If you are new to PrintSmith Vision and Sugar, your Sugar 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 Sugar, contact PrintSmith.Sales@efi.com and purchase a license for a set number of Sugar CRM users. You will then need to update your license in PrintSmith Vision before you can integrate Sugar 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 3: Establish a Connection Between PrintSmith Vision and Sugar

To establish the connection between PrintSmith Vision and Sugar, you must have the URL to your Sugar site so that you can enter this in the Integration preferences in PrintSmith Vision.

1. In PrintSmith Vision, click **Preferences** in the QuickAccess panel (or select **Admin > Preferences**).
2. Under **System**, select **Integration**.
3. Scroll down until you see the **Enable CRM Integration** check box. (This is displayed only if you are licensed to use Sugar with PrintSmith Vision.)
4. Select the **Enable CRM Integration** check box.
5. In the **CRM URL** field, enter the URL of your site (given to you by PrintSmith Support).
6. Click **Save**.



Enable CRM Integration

CRM URL

Check Connection

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 Connection**. You will receive a message that the connection was successful.

If the connection fails, make sure you entered the correct **CRM URL** and click **Check Connection** again.

Task 4: Define CRM Users in PrintSmith Vision

The final setup step is to define your CRM users – these are the PrintSmith Vision users who can use Sugar.

Important CRM users must always be defined in PrintSmith Vision. Information about the users is sent to Sugar, but you cannot define the users in Sugar.

You can define as many CRM users as your license allows. To check this number, select **Help > About PrintSmith**. The number of users is displayed next to **PrintSmith CRM**.

PrintSmith CRM (20 Users)

Before you begin: make sure e-mail is configured in PrintSmith

The definition of each CRM user must include an e-mail address. The system uses this e-mail address to send the CRM user the URL to the Sugar site, as well as the user name and password to log into the Sugar site. The e-mail address is also used to send the user information to Sugar so PrintSmith and Sugar are synchronized.

For e-mail to be sent, e-mail must be configured in PrintSmith.

- If you do not already have e-mail configured in PrintSmith Vision, configure it now as described in the section on “E-mail preferences” in the *PrintSmith Vision Setup and User Guide*.

Set up your CRM users

When you are licensed to use Sugar, the User Definitions window includes additional fields for indicating that a user is allowed to use CRM.

1. In PrintSmith Vision, select **Admin > User Definitions**. The User Definitions window opens.
2. Select an existing user in the list at the top of the window (or create a new user).

The screenshot shows the 'User Definitions' window. At the top, there are icons for 'New', 'Save', and 'Delete'. Below is a table with columns: 'User Name', 'Access Group', 'Access Level', and 'CRM Security Role'. The 'Dave' user is selected. Below the table, there are input fields for 'User Name', 'Access Group', 'Access Level', 'E-Mail', and 'E-Mail Password'. A 'CRM' panel is open on the right, showing a checked 'Allow CRM Access' checkbox and a 'Security Role' dropdown menu set to 'EFI Professional St'. A 'Reset Password' button is also visible.

User Name	Access Group	Access Level	CRM Security Role
<NO NAME>	System Admin	99	
*admin	Owner	99	EFI Professional Admin
Counter	Counter	60	
Dave	System Admin	99	
Dhina	Tes	0	
Lori	Counter	60	EFI Professional Standard
Manager	Manager	80	

Form fields for the selected user 'Counter':

- User Name: Counter
- Access Group: Counter
- Access Level: 60
- E-Mail: AnnaTaylor@mycompany.com
- E-Mail Password: [Empty]

CRM Panel:

- Allow CRM Access
- Security Role: EFI Professional St
- Reset Password

3. In the **E-Mail** field, enter the user's e-mail address. (E-mail must already be configured in PrintSmith Vision.)
4. Under **CRM**:
 - a. Select the **Allow CRM Access** check box.

- b. In the **Security Role** field, select one of the following pre-defined roles for the user:
- **EFI Professional Standard** – assign to all your regular users so they can add and modify data in Sugar and take advantage of all the Sugar features available to them.
 - **EFI Professional Minimum** – assign to users (perhaps salespeople) who should just view data, but not add, change, or delete data.
 - **EFI Professional Admin** – assign to anyone who needs to perform limited administrative tasks (for example, manage the content of pop-up lists) in addition to performing all the tasks the EFI Professional Standard role allows.

For your convenience, the role you assigned is listed in the **CRM Security Role** column in the list of users. You can therefore easily see who your CRM users are.

5. Click **Save** on the toolbar.
6. Repeat steps 2 through 5 for each CRM user you want to create.

Note If you try to create another CRM user after you reach your license limit, the system will prevent you from doing so. Either purchase a license for an increased number of users or disable (or delete) an existing CRM user to free up a license.

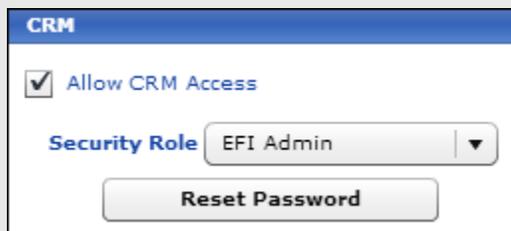
After a CRM user is created

After you save a CRM user in the User Definitions window, an e-mail is sent to the e-mail address you specified for the CRM user. This e-mail:

- Is from **printsmith.support@efi.com** and has the subject **PrintSmith CRM User Account Information**.
- Contains the user name and password for the Sugar site, as well as a link to the site.

Notes The initial password is always PrintSmith123, but users should change this after they log into Sugar. (To change the password, users must click **Edit** in their user profile and then make the change on the **Password** tab.)

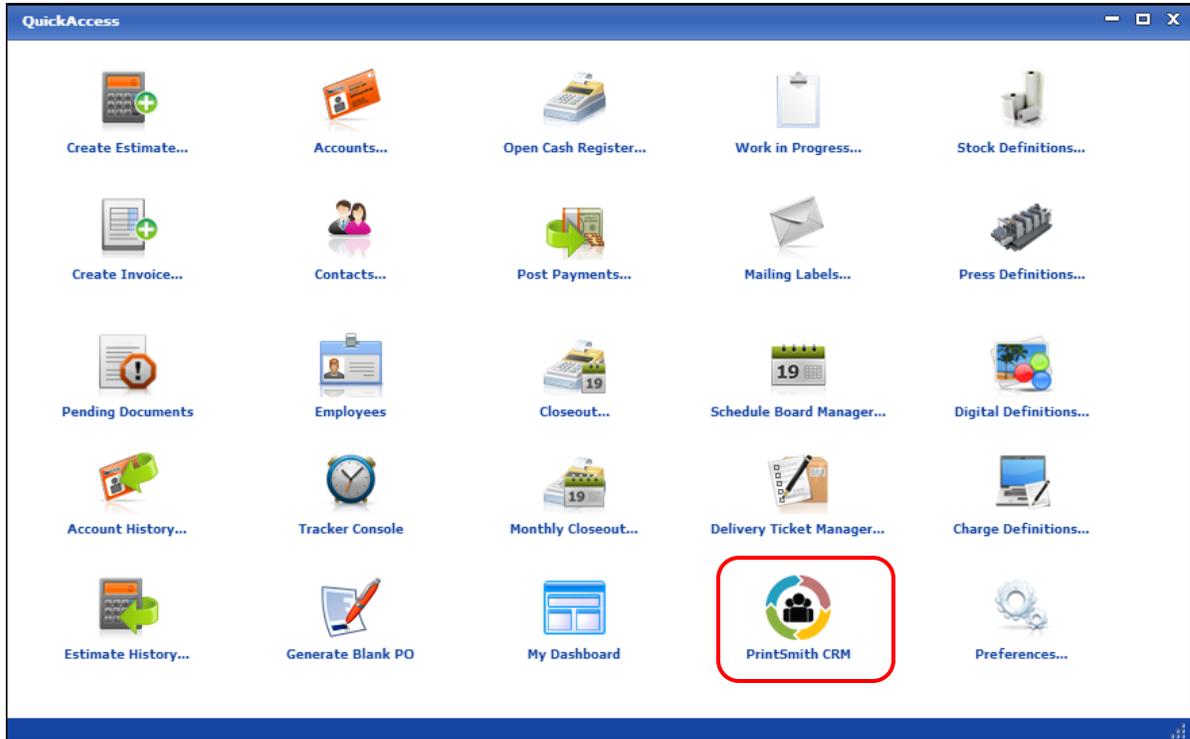
If a user forgets his or her password, you can reset it in PrintSmith Vision in the User Definitions window. Select the user, click **Reset Password** under **CRM**, and click **Save**. The user receives an e-mail about the password being reset to PrintSmith123. The user can then change the password in Sugar.



When PrintSmith and Sugar are next synchronized (every 10 minutes), the CRM user created in PrintSmith is created in Sugar. If you make any changes to the user in PrintSmith, those changes are reflected in Sugar the next time synchronization takes place.

Next Steps

After you define your CRM users, they can start to log into Sugar and use it. Users can either follow the link in the e-mail they received (and then bookmark the Sugar site) or they can always open Sugar directly from the QuickAccess panel in PrintSmith Vision by clicking **PrintSmith CRM**:



The next chapter explains how account and contact data is synchronized between the two systems.

Account and Contact Synchronization

In this chapter

Overview	16
Accounts	16
Contacts	19

Overview

When PrintSmith Vision and Sugar are integrated, information about accounts (customers and prospects) and contacts is synchronized between the two systems. When an addition or change is made in one system, it is reflected in the other system. For example, if a new account is entered in Sugar, an account is created in PrintSmith Vision, and vice versa.

Information between the two systems is synchronized every 10 minutes, but in PrintSmith Vision you can also choose to synchronize customers and contacts at any time.

This chapter describes the data that is mapped for customers/prospects and contacts so you know what to expect when entering or changing information in either Sugar or PrintSmith Vision.

Accounts

Account types

Accounts in PrintSmith can be either customers or prospects. When you create an account in Sugar, additional account types are available in the **Type** field. If you select **Prospect** in Sugar, a prospect is created in PrintSmith; if you select **Customer** or *any other type* (except for **Prospect**) in Sugar, a customer is created in PrintSmith.

Account deletions

In PrintSmith, you cannot delete an account in some situations, for example, if the account has an open balance. Sugar has no such restrictions, however. If you delete an account in Sugar that cannot be deleted in PrintSmith, the account will still exist in PrintSmith, but a message in the **CRM** pane on the **Settings** tab in the account window will let you know the account was deleted in the CRM system. No further synchronization takes place for this account.

Master accounts

A master account in PrintSmith is equivalent to making an account a “member of” another account in Sugar. This information is synchronized between the two systems.

Note In Sugar, you can make a prospect a member of an account, but in PrintSmith master accounts for prospects are not supported.

Synchronizing immediately

Data is automatically synchronized every 10 minutes. If you want to synchronize an account right away, click **Synchronize Now** on the **Settings** tab in the account window:

The screenshot shows the 'Settings' tab of an account window in PrintSmith. The interface includes several sections: 'Select Master Account...', 'Sales Rep:', 'Business Type Code', 'Ship Via:', 'PO Number', 'Tax Setup' (with fields for Tax Table, Tax Code, Resale #, Cert. Expires, and Tax Exempt), 'Preset Charges', and 'CRM'. The 'Synchronize Now' button is located in the CRM section and is highlighted with a red rectangle. Below the button, the text 'Last sync date: 9/27/2015 12:22:54 PM' is visible.

Mapping for accounts

Field in Sugar	Corresponds to this in PrintSmith
Account Name	Name of account
Type = Prospect	A prospect account
Type = Customer or any other type	A customer account
Billing Street (1 and 2)	Account > Address > Invoice Street (1 and 2)
Billing City	Account > Address > Invoice City
Billing State	Account > Address > Invoice State
Billing Postal Code	Account > Address > Invoice Zip
Billing Country	Account > Address > Invoice Country
Office Phone	Account > Address > Main Switchboard Phone
Shipping Street (1 and 2)	Account > Address > Statement Street (1 and 2)
Shipping City	Account > Address > Statement City
Shipping Postal Code	Account > Address > Statement Zip
Shipping Country	Account > Address > Country
Rating **	Account > Sales Info > Sales Ranking
Employees ***	Account > Marketing > Number of Employees
Annual Revenue ***	Account > Marketing > Annual Revenue

** The **Rating** cannot be set or edited in Sugar; it always comes from the **Sales Ranking** in PrintSmith Vision.

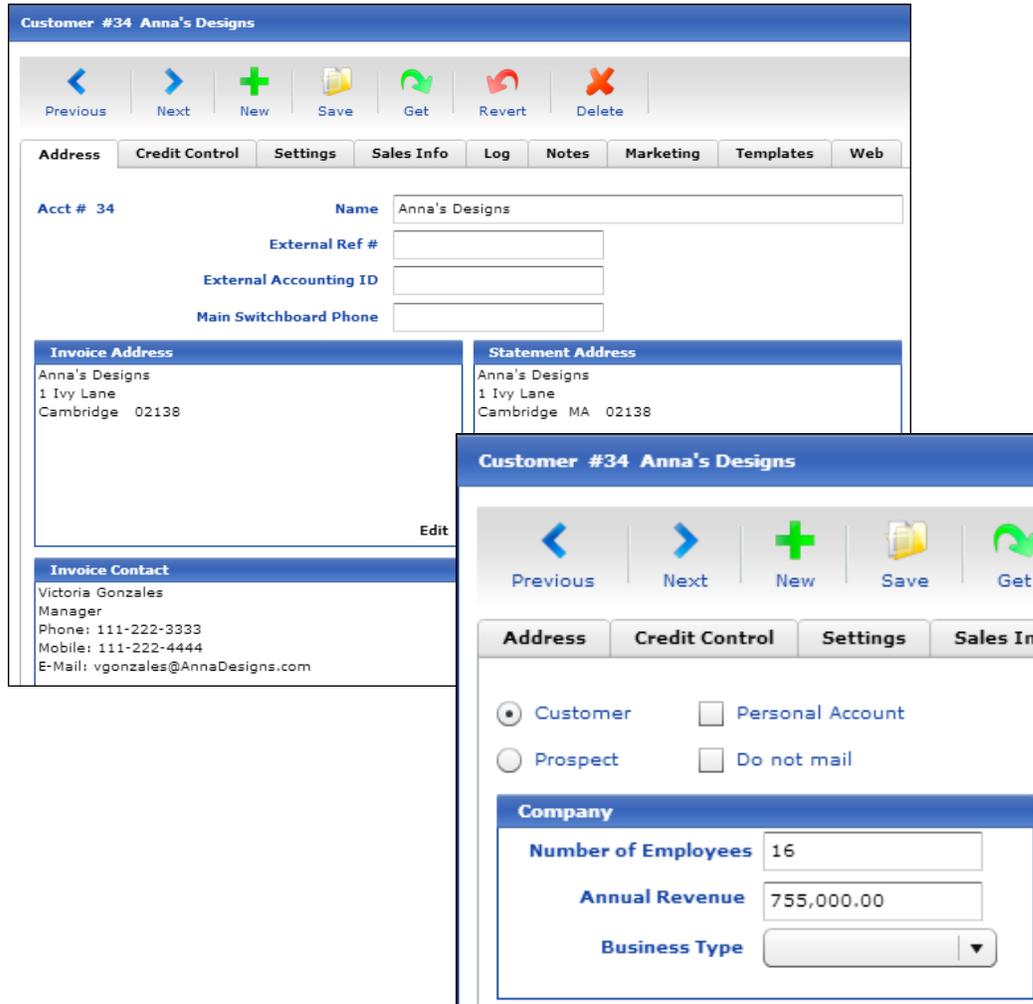
*** In Sugar, you can enter a non-numeric value in the **Employees** and **Annual Revenue** fields. PrintSmith can only accept numeric values in the corresponding fields. If you enter a non-numeric value in these fields in Sugar, the values will *not* be mapped to PrintSmith.

Example of account mapping

For example, here is an account in Sugar:

Ac Anna's Designs ☆ Follow	
	Customer
Assigned to	Office Phone 111-222-4444
Billing Address 1 Ivy Lane Cambridge, MA 02138 USA	Shipping Address 1 Ivy Lane Cambridge, 02138 USA
Alternate Phone	Email
Fax	Campaign
Twitter Account	
Description	
SIC Code	Ticker Symbol
Annual Revenue 755000	Employees 16

In PrintSmith, some of the mapped information is on the **Address** tab and some on the **Marketing** tab:



Contacts

Contact deletions

In PrintSmith, you cannot delete the default contact for an account. Sugar has no such restrictions, however. If you delete a contact in Sugar that cannot be deleted in PrintSmith, the contact will still exist in PrintSmith, but a message in the **CRM** pane on the **Marketing** tab in the Contact window will let you know the contact was deleted in the CRM system. No further synchronization takes place for this contact.

If a non-default contact is deleted in Sugar, but the contact was used on an invoice (and was the only contact available as a selection), the Account Info window now displays a "temporary contact" for the invoice.

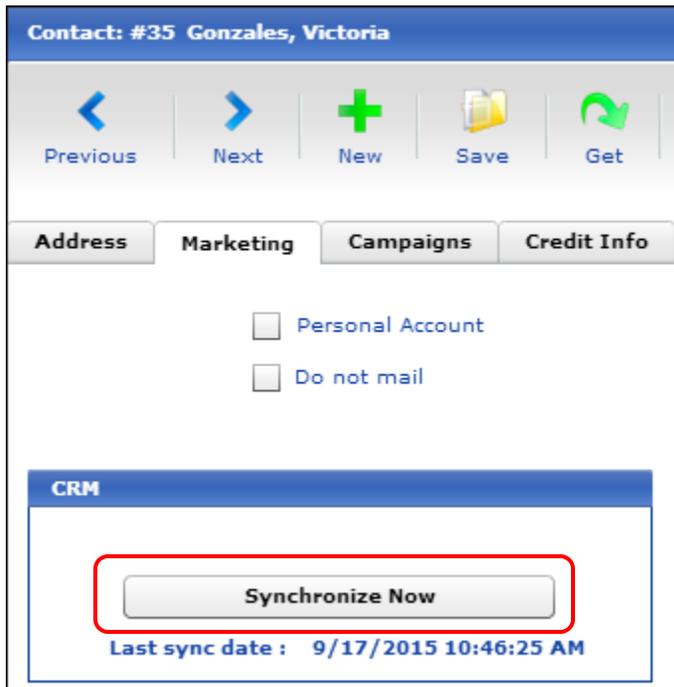
Contact reassignments in Sugar

If you assign a contact to a different account in Sugar, and the contact was the default contact for the original account, one of the following happens in PrintSmith Vision:

- If the original account has additional contacts, the default contact is assigned to the new account and one of the additional contacts for the original account becomes the new default contact.
- If the default contact was the only contact for the original account, the contact is moved to the new account and a new default contact is created for the account with just the account name as a last name.

Synchronizing immediately

Data is automatically synchronized every 10 minutes. If you want to synchronize an account right away, click **Synchronize Now** on the **Marketing** tab in the Contact window:



Mapping for contacts

Field in Sugar	Corresponds to this in PrintSmith
Contact Name	Name of contact
Email	Edit Contact window > E-Mail
Salutation	Edit Contact window > Prefix
First Name	Edit Contact window > First
Last Name	Edit Contact window > Last
Title	Edit Contact window > Job Title
Mobile	Edit Contact window > Mobile
Home	Edit Contact window > Home Phone
Office Phone	Edit Contact window > Phone
Other Phone	Edit Contact window > Other
Primary Address Street (1 and 2)	Edit Address window > Street (1and 2) **

Field in Sugar	Corresponds to this in PrintSmith
Primary Address City	Edit Address window > City **
Primary Address State	Edit Address window > State **
Primary Address Postal Code	Edit Address window > Zip **
Primary Address Country	Edit Address window > Country **

** These fields in PrintSmith Vision apply only if the **Use Contact Address** check box is selected on the **Address** tab in the Contact window.

Example of contact mapping

For example, here is a contact in Sugar:

Co

Ms. Victoria Gonzales

☆

Follow

<p>Title Manager</p> <p>Department</p> <p>Account Name Anna's Designs</p> <p>Other Phone <input type="text"/></p> <p>Home</p> <p>Primary Address</p> <p>Fax</p> <p>Twitter Account</p>	<p>Mobile 111-222-4444</p> <p>Do Not Call <input type="checkbox"/></p> <p>Email vgonzales@AnnaDesigns.com</p> <p>Lead Score</p> <p>Alternate Address</p> <p>Office Phone 111-222-3333</p> <p>D&B Principal Id</p>
--	--

In PrintSmith Vision, here is the same information about the contact:

The screenshot displays the PrintSmith Vision interface for managing a contact. The main window shows contact details for Victoria Gonzales, including ID # 35, Acct # 34, and Account Anna's Designs. A 'Contact' tab is active, showing her name, title (Manager), and contact information (Phone: 111-222-3333, Mobile: 111-222-4444, E-Mail: vgonzales@AnnaDesigns.com). An 'Edit Contact' dialog box is overlaid on the main window, allowing for updates to the contact's information.

Contact: #35 Gonzales, Victoria

Previous Next New Save Get Notify Revert Delete

Address Marketing Campaigns Credit Info Web

ID # 35
Acct # 34
Account Anna's Designs

Change Account... <invoice contact
 Use Contact Address

Contact
Ms. Victoria Gonzales
Manager
Phone: 111-222-3333
Mobile: 111-222-4444
E-Mail: vgonzales@AnnaDesigns.com

Edit Contact

First: Victoria
Last: Gonzales
Prefix: Ms. Suffix:
Phone: 111-222-3333 Fax:
Mobile: 111-222-4444 Other:
E-Mail: vgonzales@AnnaDesigns.com
Twitter: Facebook:
Web Site:
Home Phone:
Job Title: Manager
Salutation:
OK Cancel