

efi PrintSmith Vision™



SugarCRM® Integration Guide

PrintSmith™ Vision
Version 3.2

December / 2015

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EFI PrintSmith Vision | *SugarCRM Integration Guide*

December 2015 PrintSmith Vision 3.2

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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

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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, configure the CRM URL for you in PrintSmith Vision. You can then complete the connection process.

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

Before you can connect PrintSmith Vision and Sugar, EFI Support must configure the CRM URL for you.

After Support confirms that the CRM URL was configured for you:

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.)

Note The **CRM URL** field will already include the URL for your Sugar site; you cannot change this. If this field is blank, contact EFI Support.

4. Click **Save**.
5. *Log out of PrintSmith Vision and log back in.*
6. 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.
7. Click **Start Synchronization**.

The screenshot shows a configuration window for CRM integration. At the top, there is a checkbox labeled 'Enable CRM Integration' which is checked. Below this, there is a label 'CRM URL' followed by a text input field containing the URL 'http://sugqaapp01-ext.myprintdesk.net/'. To the right of the URL field is a button labeled 'Check Connection'. Below the URL field is another button labeled 'Start Synchronization'.

Note If at any point you need to stop synchronization between PrintSmith and the CRM system, click **Stop Synchronization** in the Integration preferences (but then remember to start it 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.

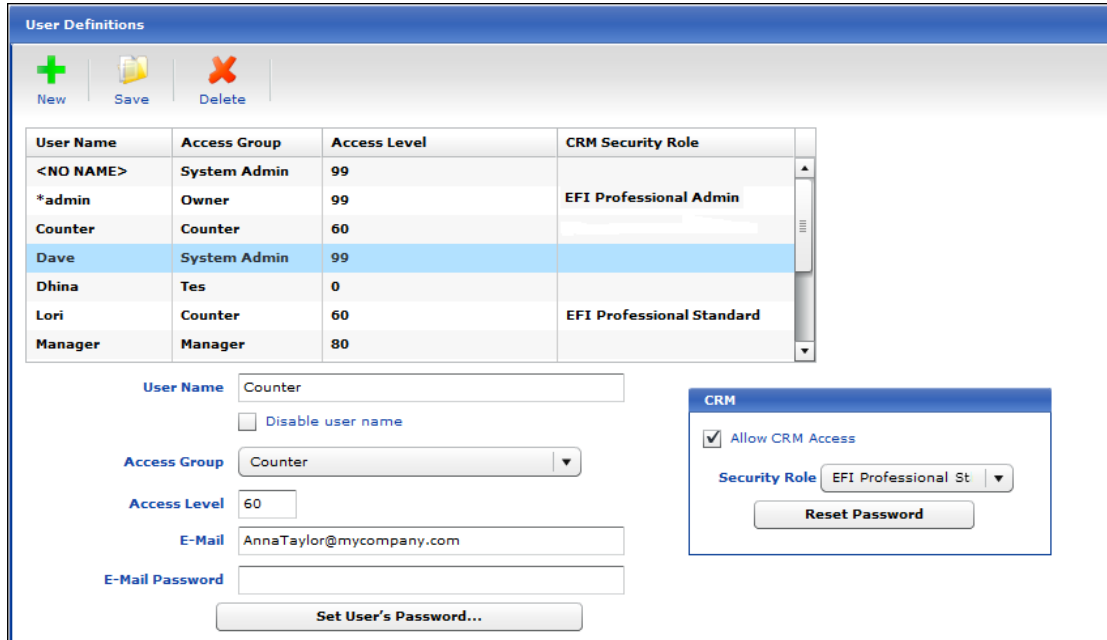
For e-mail to be sent, e-mail must be configured in PrintSmith.

- 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).



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

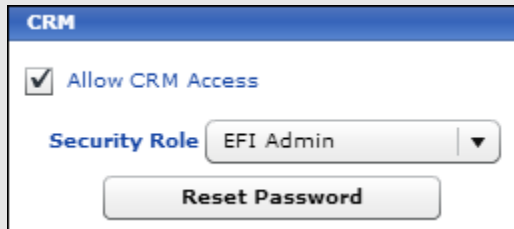
After you save a CRM user in the User Definitions window, an e-mail is sent to the e-mail address you specified for the CRM user. This e-mail:

- 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.

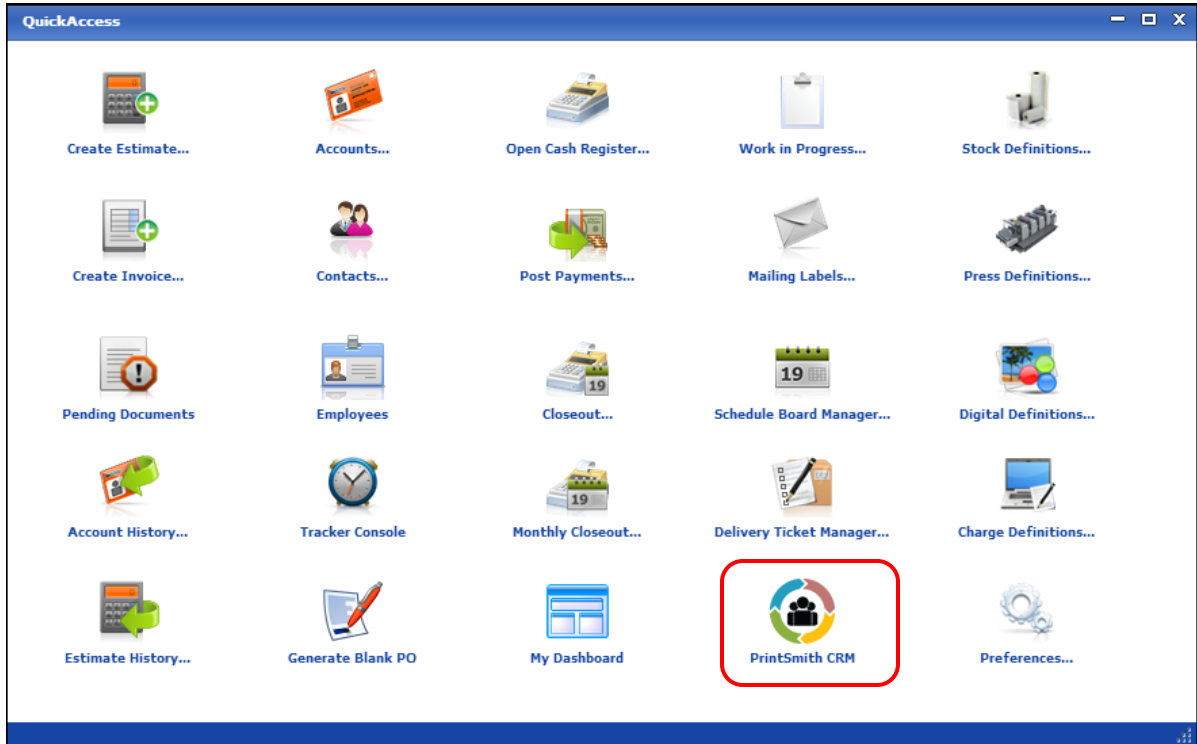


The screenshot shows a window titled "CRM" with a blue header. Inside the window, there is a checked checkbox labeled "Allow CRM Access". Below this is a "Security Role" dropdown menu currently set to "EFI Admin". At the bottom of the window is a button labeled "Reset Password".

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

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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 manually 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

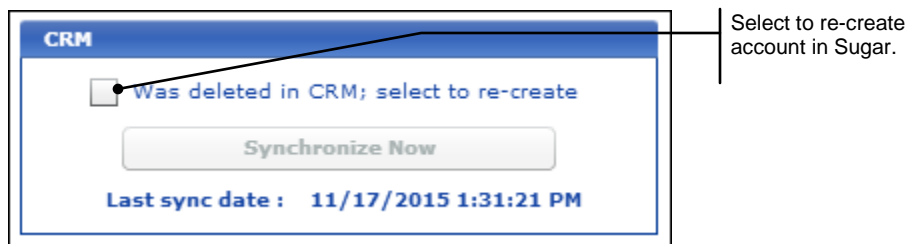
Accounts in PrintSmith can be either customers or prospects. When you create an account in Sugar, additional account types are available in the **Type** field. If you select **Prospect** in Sugar, a prospect is created in PrintSmith; if you select **Customer** or *any other type* (except for **Prospect**) 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 still exists in PrintSmith, but the **CRM** pane on the **Settings** tab in the account window indicates the account was deleted in the CRM system (and gives you the option of re-creating it). No further synchronization takes place for this account.

If the account was deleted by mistake in Sugar, *and it is an account that cannot be deleted in PrintSmith*, you can re-create the account in Sugar from PrintSmith Vision:

1. In PrintSmith, click **Accounts** in the QuickAccess panel (or select **AR > Accounts**).
2. Select the account that was deleted in Sugar.
3. Click the **Settings** tab.
4. Select the **Was deleted in CRM; select to re-create** check box and click **Save**.



When data is next synchronized, the account is re-created in Sugar using the information about the account that is in PrintSmith Vision.

Note If you entered additional information in Sugar about the account (for example, notes or calls), that information is *not* restored.

Master accounts

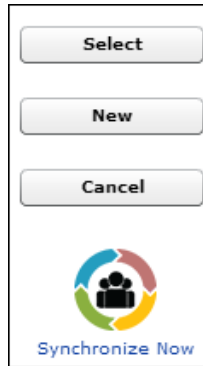
A master account in PrintSmith is equivalent to making an account a “member of” another account in Sugar. This information is synchronized between the two systems.

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

The accounts in Sugar and PrintSmith are automatically synchronized every 10 minutes, but you can also synchronize accounts manually at any time from PrintSmith Vision:

- When you create an account in Sugar, you may want to use the account immediately in PrintSmith Vision (for example, to create an estimate or invoice for the account). In the Account Picker window, click **Synchronize Now**. The synchronization is two-way – if you made a change to an account in PrintSmith, the information flows to Sugar.



- If you make changes to an account in Sugar and want to see the results right away in PrintSmith, open the account (**AR > Accounts**), click the **Settings** tab, and then click **Synchronize Now** under **CRM**. (You can also do this if you make changes to an account in PrintSmith and want to see them in Sugar right away.)

Customer #2003 Anna Company B

Previous Next New Save Get Revert Delete

Address Credit Control **Settings** Sales Info Log Notes Marketing Templates Web

Select Master Account... []

Sales Rep: []

Business Type Code []

Ship Via: []

PO Number []

PO required on Invoice

Do NOT generate statements

Account is commissioned

Always file originals

Default Invoice [No default specified]

Default Estimate [No default specified]

Preset Charges

Add to Invoices and Estimates [Add Charges...]

Add to Jobs [Add Charges...]

Tax Setup

Tax Table [VAT]

Tax Code []

Resale # []

Cert. Expires []

Tax Exempt

Security level of this account [0]

File Expiration

Use Account level setting

Specify how long customer files remain in the system before being deleted. Too many files can deplete system resources (hard drive space)

Duration [0] Day

(Using system limit of 180 Day(s))

CRM

Synchronize Now

Last sync date : 11/13/2015 11:11:28 AM

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
Industry ****	Account > Marketing > Business Type


** 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.

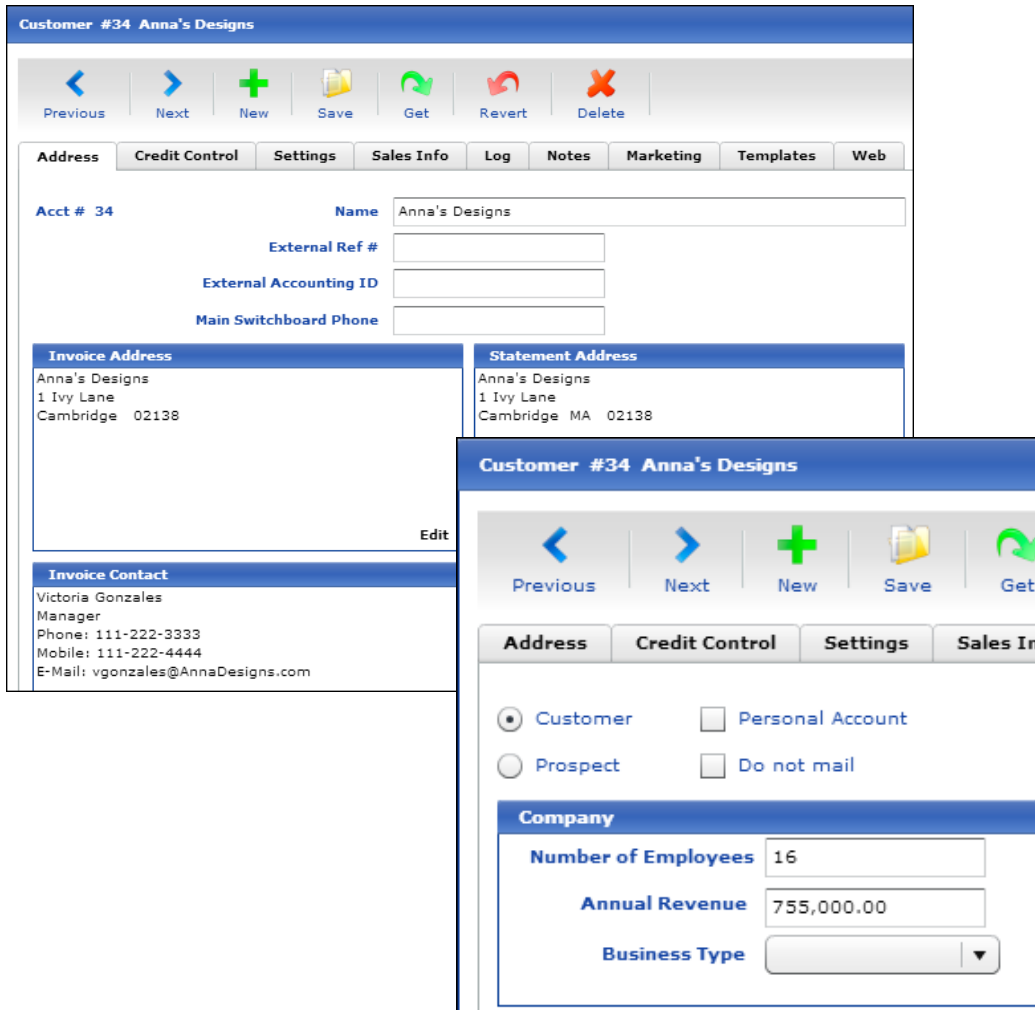
**** When you specify an industry for an account in Sugar, the information flows to PrintSmith, but not vice versa. If you enter a business type in PrintSmith, the industry in Sugar is not updated.

Example of account mapping

For example, here is an account in Sugar:

 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 still exists in PrintSmith, but the **CRM** pane on the **Marketing** tab in the Contact window indicates that the contact was deleted in the CRM system (and give you the option of re-creating it). 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.

If a contact was deleted by mistake in Sugar, *and it is a default contact for an account (which cannot be deleted in PrintSmith)*, you can re-create the contact in Sugar from PrintSmith Vision:

1. In PrintSmith, click **Contacts** in the QuickAccess panel (or select **AR > Contacts**).
2. Select the contact that was deleted in Sugar.
3. Click the **Marketing** tab.

4. Select the **Was deleted in CRM; select to re-create** check box and click **Save**.

The screenshot shows a CRM window with a blue header. Below the header, there is a checkbox with the label "Was deleted in CRM; select to re-create". Below the checkbox is a button labeled "Synchronize Now". At the bottom of the window, it says "Last sync date : 11/17/2015 1:31:21 PM". A callout box on the right side of the window points to the checkbox with the text "Select to re-create contact in Sugar."

When data is next synchronized, the contact is re-created in Sugar using the information about the contact that is in PrintSmith Vision.

Note If you entered additional information in Sugar about the contact (for example, notes or calls), that information is *not* restored.

Contact reassignments in Sugar

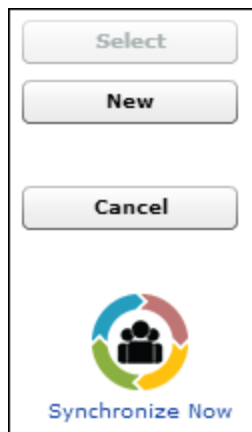
If you assign a contact to a different account in Sugar, and the contact was the default contact for the original account, one of the following happens in PrintSmith Vision:

- 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.

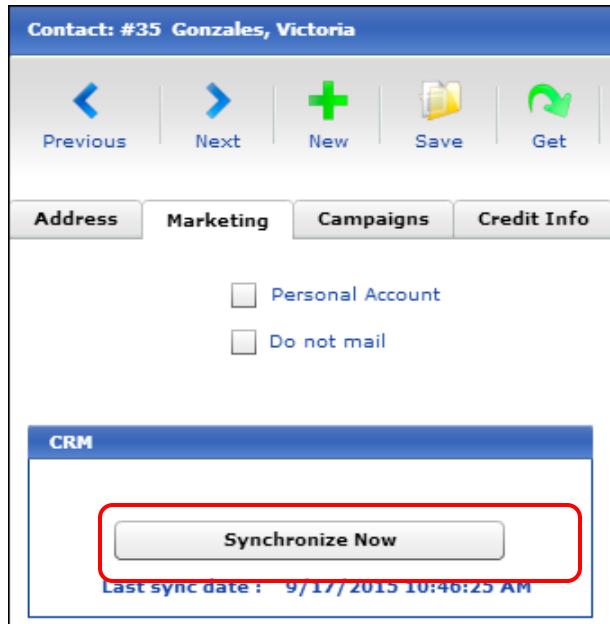
Synchronizing immediately

The contacts in Sugar and PrintSmith are automatically synchronized every 10 minutes, but you can also synchronize contacts manually at any time from PrintSmith Vision:

- When you create a contact in Sugar, and want the contact to be available in PrintSmith Vision immediately, in the Contact Picker window, click **Synchronize Now**. The synchronization is two-way – if you made a change to a contact in PrintSmith, the information flows to Sugar.



- If you make changes to a contact in Sugar and want to see the results right away in PrintSmith, open the contact (**AR > Contacts**), click the **Marketing** tab, and then click **Synchronize Now** under **CRM**. (You can also do this if you made changes to a contact in PrintSmith and want to see the changes in Sugar right away.)



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) **
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 **
Lead Source ***	Contact > Marketing > Lead Source

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

*** When you specify a lead source for a contact in Sugar, the information flows to PrintSmith, but not vice versa. If you enter or edit a lead source in PrintSmith, the lead source in Sugar is not updated.

Example of contact mapping

For example, here is a contact in Sugar:

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

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

The screenshot shows the contact details for Victoria Gonzales in PrintSmith Vision. The main view includes a navigation bar with icons for Previous, Next, New, Save, Get, Notify, Revert, and Delete. Below this are tabs for Address, Marketing, Campaigns, Credit Info, and Web. The contact information is displayed in a structured layout:

- ID #**: 35
- Acct #**: 34
- Account**: Anna's Designs

A 'Contact' summary box shows: Ms. Victoria Gonzales, Manager, Phone: 111-222-3333, Mobile: 111-222-4444, E-Mail: vgonzales@AnnaDesigns.com. An 'Edit Contact' dialog box is overlaid, containing the following fields:

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

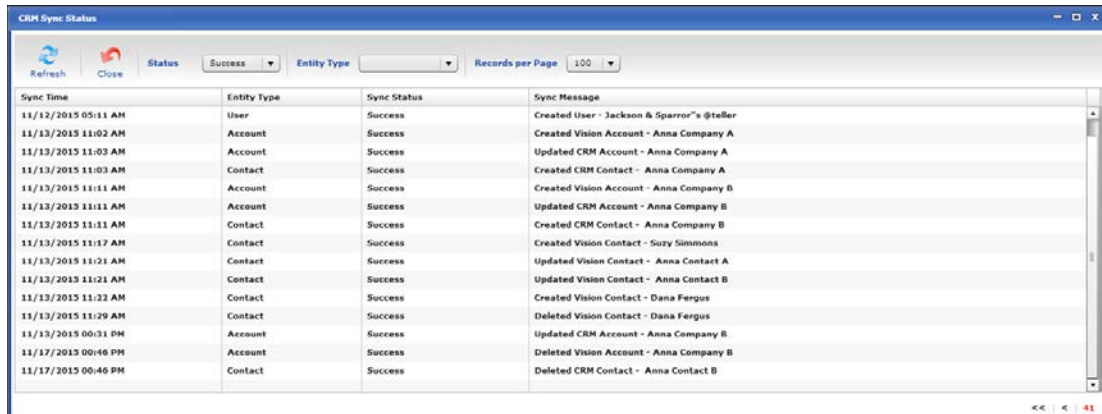
Buttons for 'OK' and 'Cancel' are at the bottom of the dialog. A 'Change Account...' button and a 'Use Contact Address' checkbox are also visible in the main contact view.

Synchronization Logs

The synchronization between PrintSmith Vision and Sugar is logged. The logs confirm successful synchronization as well as identify any failures. Log entries are kept for 15 days, after which they are automatically deleted.

1. In PrintSmith Vision, select **Admin > System Monitor**.
2. Click **CRM Sync Status**.
3. Do any of the following:
 - Click **Refresh** to update the list.
 - In the **Status** field, select **Success**, **Failure**, or **Warning** to see a particular type of condition.
 - In the **Entity Type** field, leave it blank to see information about accounts, contacts, *and* users or select **Account**, **Contact**, or **User** to narrow the list.

- By default 100 **Records per Page** are listed. Change this number if necessary.
- Use the pagination controls to move among pages. The current page is always displayed in red.



The screenshot shows a window titled "CRM Sync Status" with a toolbar containing "Refresh" and "Close" buttons. Below the toolbar are filters for "Status" (set to "Success"), "Entity Type", and "Records per Page" (set to "100"). The main area contains a table with the following columns: "Sync Time", "Entity Type", "Sync Status", and "Sync Message".

Sync Time	Entity Type	Sync Status	Sync Message
11/12/2015 05:11 AM	User	Success	Created User - Jackson & Sparror's @teller
11/13/2015 11:02 AM	Account	Success	Created Vision Account - Anna Company A
11/13/2015 11:03 AM	Account	Success	Updated CRM Account - Anna Company A
11/13/2015 11:03 AM	Contact	Success	Created CRM Contact - Anna Company A
11/13/2015 11:11 AM	Account	Success	Created Vision Account - Anna Company B
11/13/2015 11:11 AM	Account	Success	Updated CRM Account - Anna Company B
11/13/2015 11:11 AM	Contact	Success	Created CRM Contact - Anna Company B
11/13/2015 11:17 AM	Contact	Success	Created Vision Contact - Suzy Simmons
11/13/2015 11:21 AM	Contact	Success	Updated Vision Contact - Anna Contact A
11/13/2015 11:21 AM	Contact	Success	Updated Vision Contact - Anna Contact B
11/13/2015 11:22 AM	Contact	Success	Created Vision Contact - Dana Fergus
11/13/2015 11:29 AM	Contact	Success	Deleted Vision Contact - Dana Fergus
11/13/2015 00:31 PM	Account	Success	Updated CRM Account - Anna Company B
11/17/2015 00:46 PM	Account	Success	Deleted Vision Account - Anna Company B
11/17/2015 00:46 PM	Contact	Success	Deleted CRM Contact - Anna Contact B

At the bottom right of the table, there are pagination controls: "<< | < | 41 | > | >>".