Crouser Pricing

PrintSmith Vision
Version 3.3
March / 2016

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EFI PrintSmith Vision | *Crouser Pricing*

March 2016 PrintSmith Vision 3.3

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Introduction

What Is Crouser Pricing?

Crouser & Associates offer subscription-based price lists that can be imported into PrintSmith Vision and used for list-based jobs. The subscription is renewable annually.

This document describes how to activate Crouser pricing in PrintSmith Vision and then how to use the price lists. The document assumes that PrintSmith Vision is already installed and set up and that you are familiar with job creation and workflow.

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*

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

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Activating and Importing Crouser Pricing

Overview

The process of activating Crouser pricing has three main steps:

1. Purchase the price lists from Crouser & Associates.
2. Provide Crouser with the Crouser ID that is created in PrintSmith Vision.
3. Once Crouser validates the ID, import the price lists.
4. (Optional) Import the Crouser stock catalog.

Contact Information for Crouser & Associates

You will need to contact Crouser & Associates to purchase or renew a subscription as well as to provide your Crouser ID so that you can import the price lists into PrintSmith Vision.

- www.Crouser.com
- 888-427-3714

Task 1: Purchase Crouser Price Lists

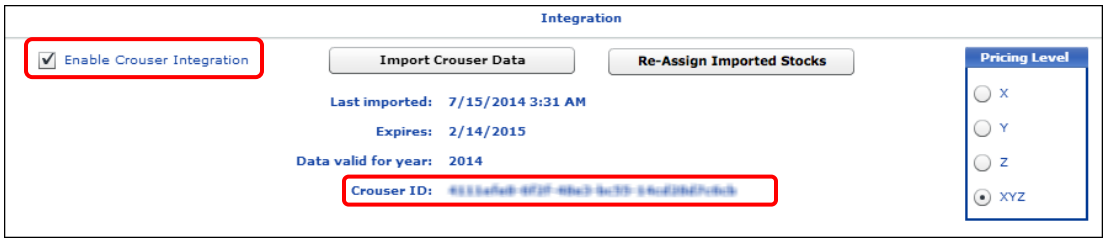
- Contact Crouser & Associates to purchase the price lists.

Task 2: Send Crouser ID to Crouser

When PrintSmith Vision is integrated with Crouser, a unique ID is generated in PrintSmith. This ID must be given to Crouser so they can validate you as a subscriber and allow you to import the price lists to PrintSmith Vision.

1. In PrintSmith Vision, click **Preferences** in the QuickAccess panel (or select **Admin > Preferences**).
2. Under **System**, select **Integration**.
3. Select the **Enable Crouser Integration** check box and click **Save** on the toolbar.

   The **Crouser ID** is now displayed.



4. Contact Crouser & Associates (as described above) to provide them with your Crouser ID. Crouser will now validate you in their system.

Task 3: Import Crouser Price Lists

After Crouser validates your ID:

1. In the PrintSmith Vision Integration preferences, click **Import Crouser Data**.
2. By default all the Crouser price lists are imported. To control which particular price lists are available (displayed) to users in PrintSmith Vision, under **Pricing Level**, select **X**, **Y**, **Z**, or **XYZ**.

Note	X, Y, and Z represent specific price lists, for example, X has the schedules *only* from the *X Crouser Guide to Estimating*. XYZ includes all the price schedules.

Task 4: (Optional) Import the Crouser Stock Catalog

You may find it useful to import stocks from the Crouser catalog. When you select these stocks for jobs, the stock cost is automatically added to the job.

Note If you prefer to attach price lists to your own stock definitions (as described in “Assigning Crouser List Price Schedules to Stocks” on page 8) or to select a list price schedule for a job, skip the import of the stock catalog.

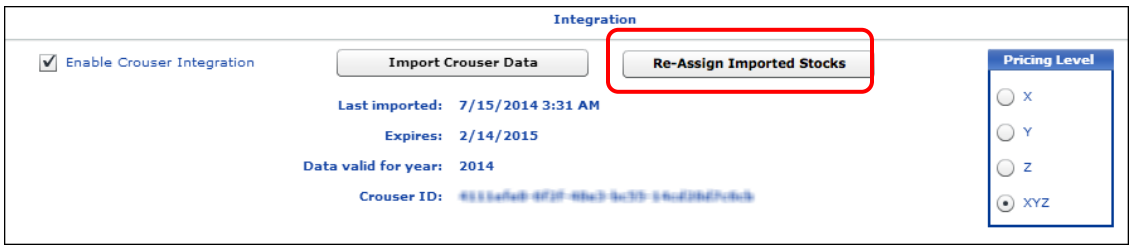
1. Obtain the import file (in CSV format) from Crouser & Associates.
2. In PrintSmith Vision, select **Pricing > Import Stock Catalog**.
3. In the **Import File** field, specify the location and name of the import file. (Click **Browse** to locate the file.)
4. Click **Import All**.

Note The stocks that are imported are based on the pricing level selected in your Integration preferences: X, Y, or Z. If XYZ is selected, X-level stocks are imported.

If You Upgraded from PrintSmith Classic

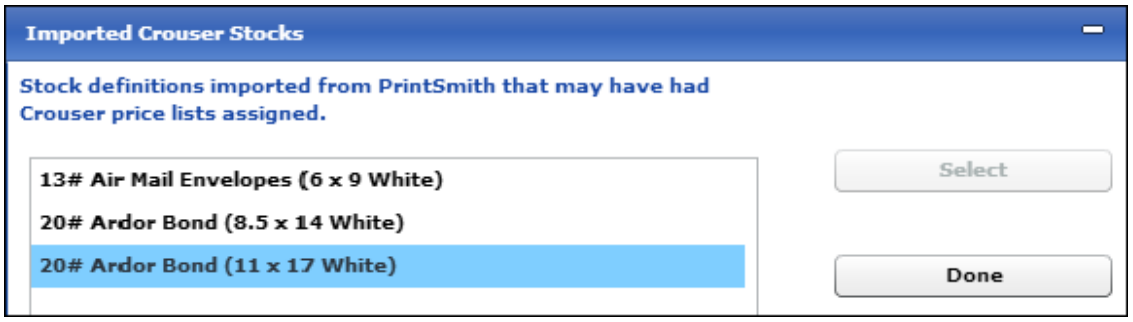
If you upgraded to PrintSmith Vision from PrintSmith Classic, and were using Crouser pricing, the associations between your stock definitions and Crouser list price schedules could not be imported when you upgraded to PrintSmith Vision. You will need to re-associate stock definitions with Crouser list price schedules. To help you in this process, you can obtain a list of stocks that previously had Crouser list price schedules associated with them.

1. In PrintSmith Vision, click **Preferences** in the QuickAccess panel (or select **Admin > Preferences**).
2. Under **System**, select **Integration**.
3. Click **Re-Assign Imported Stocks**.



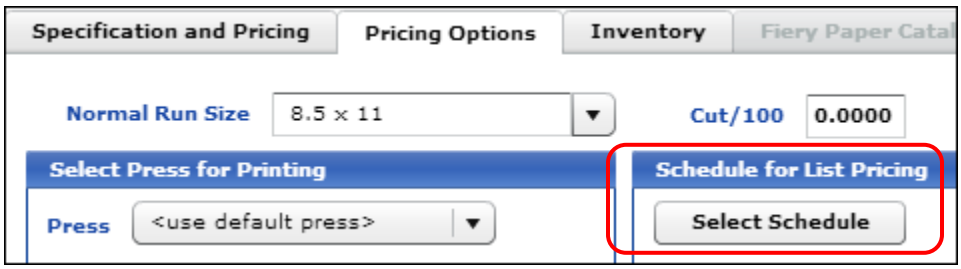
The window that opens lists all the stocks that had Crouser list price schedules associated with them in PrintSmith Classic.

4. To edit a stock definition (so you can associate a Crouser schedule with it), select the stock name and then click **Select**.



The stock you selected opens in the Stock Definitions window.

5. In the Stock Definitions window, click the **Pricing Options** tab and then click **Select Schedule**.



6. Select the Crouser list price schedule you want to associate with the stock and then save the stock definition. (For more information about viewing and selecting Crouser list price schedules, see the section that follows.)

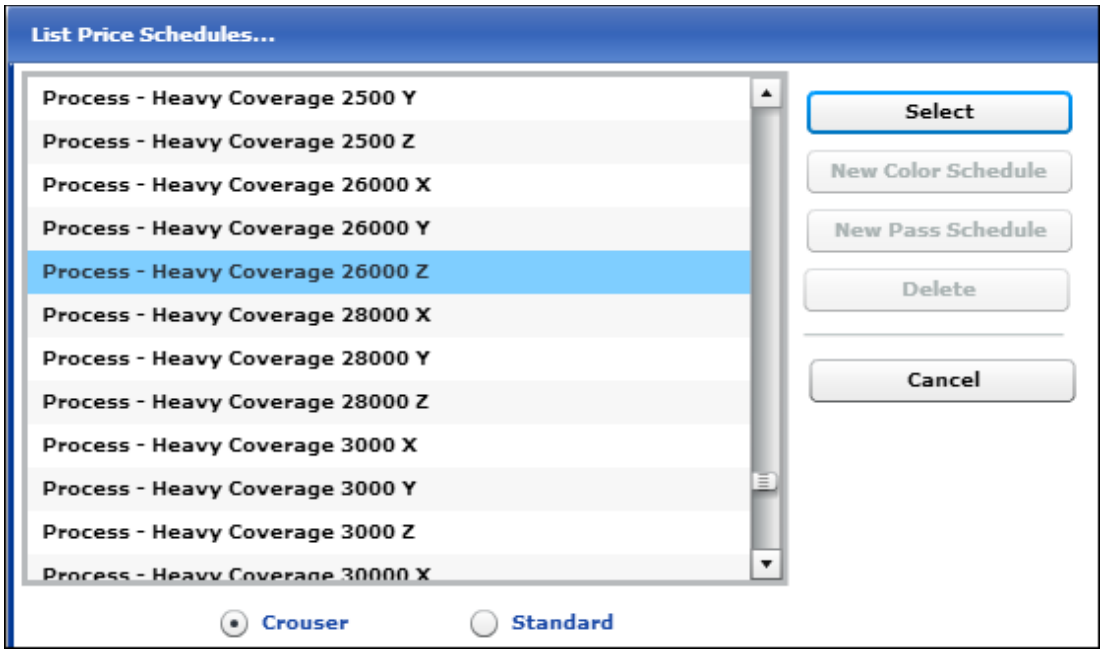
Using Crouser List Price Schedules

Crouser list price schedules are like other list price schedules in PrintSmith Vision, except that you cannot delete them, change their names, or edit their contents.

Viewing Crouser List Price Schedules

1. In PrintSmith Vision, select **Pricing > List Price Schedules**. The List Price Schedules window opens with Crouser lists displayed by default.

Note When **Crouser** is selected in the List Price Schedules window, you cannot delete a list price schedule nor create a new list price schedule.

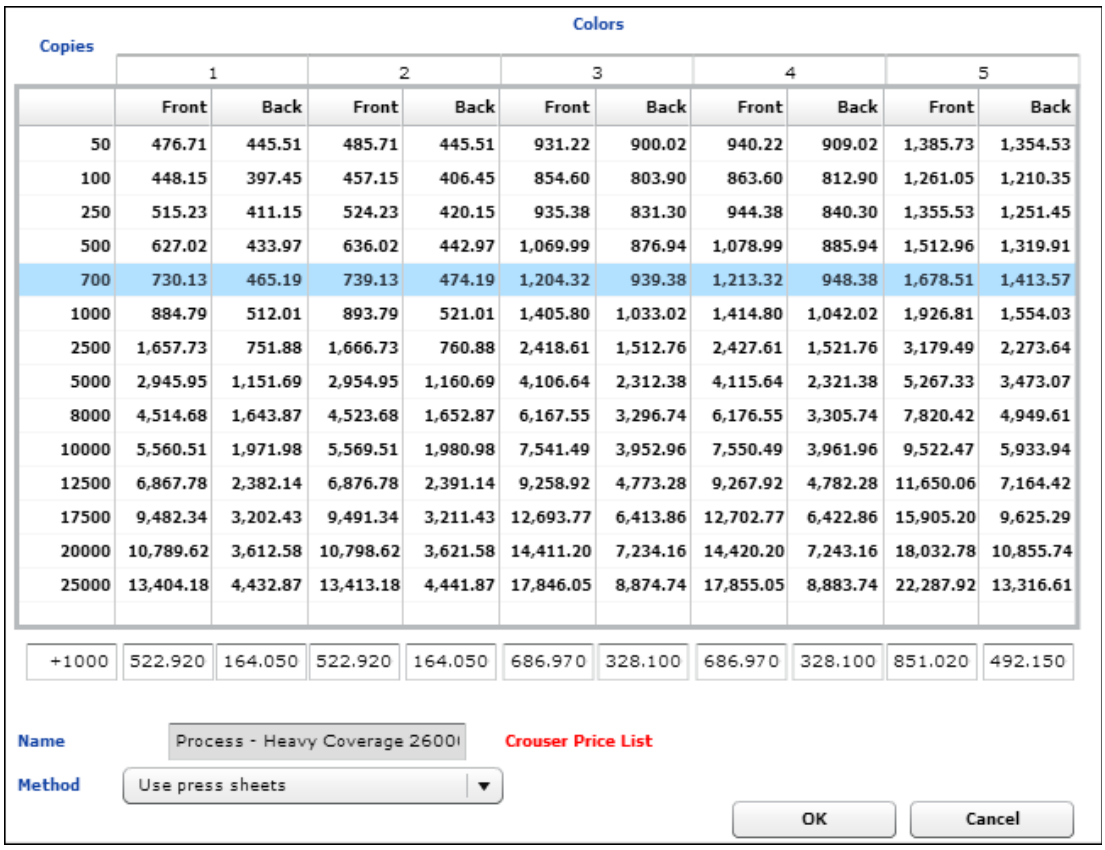


2. Scroll through the list to locate the schedule you want.

Tip You can type the first few characters of a schedule name to move to the first instance of a schedule that begins with those characters. For example, typing **bond** will take you to the first instance of bond schedules.

3. Double-click the list you want to open (or highlight the list and click **Select**).

The price list opens.



Colors

Copies	1		2		3		4		5	
	Front	Back	Front	Back	Front	Back	Front	Back	Front	Back
50	476.71	445.51	485.71	445.51	931.22	900.02	940.22	909.02	1,385.73	1,354.53
100	448.15	397.45	457.15	406.45	854.60	803.90	863.60	812.90	1,261.05	1,210.35
250	515.23	411.15	524.23	420.15	935.38	831.30	944.38	840.30	1,355.53	1,251.45
500	627.02	433.97	636.02	442.97	1,069.99	876.94	1,078.99	885.94	1,512.96	1,319.91
700	730.13	465.19	739.13	474.19	1,204.32	939.38	1,213.32	948.38	1,678.51	1,413.57
1000	884.79	512.01	893.79	521.01	1,405.80	1,033.02	1,414.80	1,042.02	1,926.81	1,554.03
2500	1,657.73	751.88	1,666.73	760.88	2,418.61	1,512.76	2,427.61	1,521.76	3,179.49	2,273.64
5000	2,945.95	1,151.69	2,954.95	1,160.69	4,106.64	2,312.38	4,115.64	2,321.38	5,267.33	3,473.07
8000	4,514.68	1,643.87	4,523.68	1,652.87	6,167.55	3,296.74	6,176.55	3,305.74	7,820.42	4,949.61
10000	5,560.51	1,971.98	5,569.51	1,980.98	7,541.49	3,952.96	7,550.49	3,961.96	9,522.47	5,933.94
12500	6,867.78	2,382.14	6,876.78	2,391.14	9,258.92	4,773.28	9,267.92	4,782.28	11,650.06	7,164.42
17500	9,482.34	3,202.43	9,491.34	3,211.43	12,693.77	6,413.86	12,702.77	6,422.86	15,905.20	9,625.29
20000	10,789.62	3,612.58	10,798.62	3,621.58	14,411.20	7,234.16	14,420.20	7,243.16	18,032.78	10,855.74
25000	13,404.18	4,432.87	13,413.18	4,441.87	17,846.05	8,874.74	17,855.05	8,883.74	22,287.92	13,316.61
+1000	522.920	164.050	522.920	164.050	686.970	328.100	686.970	328.100	851.020	492.150

4. Review the contents of the price list and click **OK**.

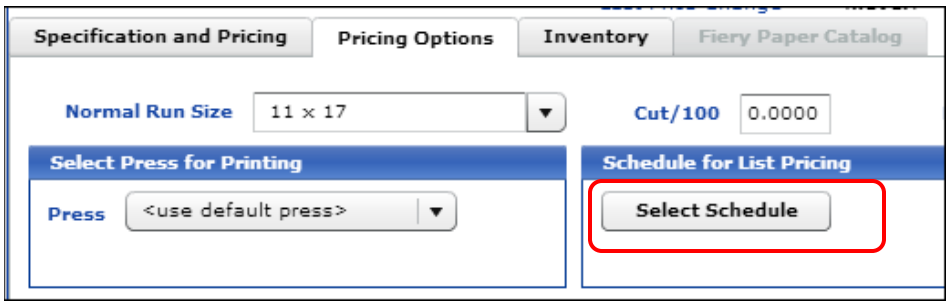
Note You cannot change any information in the price list, but you can select a different **Method**.

Assigning Crouser List Price Schedules to Stocks

When you use list pricing as the job method, your stock definitions can be (but do not have to be) associated with list price schedules. When a list price schedule is associated with a stock that you select for a list-based job, the list price schedule is used to price the job. If the selected stock does not have an assigned list price schedule, you are warned that the default list price schedule will be used for the list-based job; you can then select a Crouser list price schedule for the job.

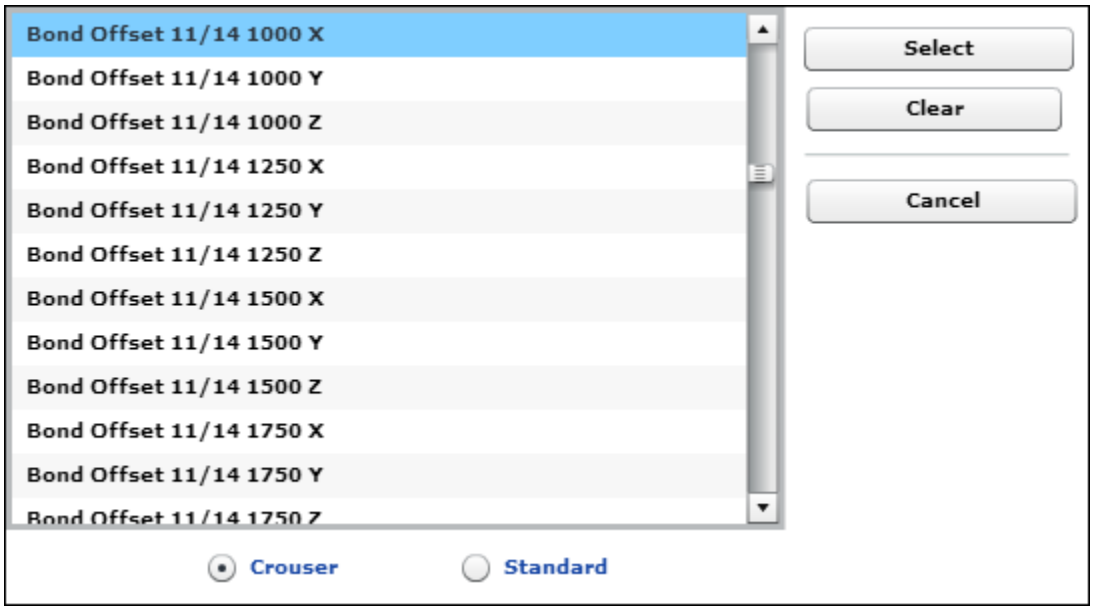
To assign Crouser list price schedules to stocks

1. Open a stock.
2. In the Stock Definitions window, click the **Pricing Options** tab.
3. Under **Schedule for List Pricing**, click **Select Schedule**.



A window opens with a list of all the price schedules. Crouser list price schedules are displayed by default.

4. Locate the price list you want to use and click **Select**.



The name of the schedule is now displayed to the right of the **Select Schedule** button on the **Pricing Options** tab.

5. Save the stock definition.
6. Repeat this procedure for each stock in your system that you want to be assigned to a Crouser list price schedule.

Once each stock has an assigned schedule, you can start to create jobs based on Crouser pricing.

Creating Jobs Based on Crouser List Price Schedules

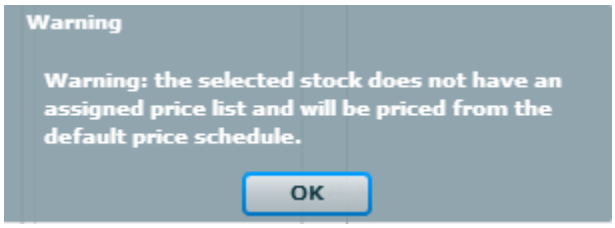
When you select **List** as the job method, you must also select a list price schedule. If the stock you select for the job is associated with a list price schedule (see above), that schedule is used automatically (although you can change it). Otherwise, you must select a schedule while creating the job.

1. When creating a job, select **List** as the **Job Method**.

2. Select a stock for the job.
3. If the stock has a list price schedule associated with it, the schedule will be used for the job automatically. If you want to select a different price schedule, click **Change** to the right of the **Schedule** field and select the price schedule.

If the stock does *not* have a list price schedule associated with it, you are warned that the default price schedule will be used.

Note The default price schedule is the first price schedule in the List Price Schedules window (**Pricing > List Price Schedules**).



In this case,

a. Click **OK** to close the warning.

b. Click **Change** to the right of the **Schedule** field and select a Crouser list price schedule. (Alternatively, click **Change Schedule Selection** under **Commands** in the Job window to select the price schedule).

4. Provide the other job details (such as order quantity) as usual and then save the job and the document.

If the Pricing Level Is Changed

When you imported the Crouser price lists you selected the pricing level you wanted to use in PrintSmith Vision: X, Y, Z, or XYZ. This selection controls which Crouser list price schedules are displayed and used in PrintSmith Vision.

If you later decide to try another pricing level, you can select it in the Integration preferences. After you save the change, you are informed that stock definitions and job templates will now use the new pricing level. For example, if a stock was associated with an X price list and you changed the pricing level to Y, the stock will now be associated with the corresponding Y price list.

In addition, note the following:

- Changes to the pricing level do *not* change the selected Crouser price list in documents currently on the pending list.
- If you do any of the following, any documents that use a Crouser price list are updated to use the selected pricing level:
  - Convert an estimate to an invoice
  - Copy a document to a new invoice
  - Copy a document to a new estimate
- If a template uses a Crouser price list, and you base a document or job on it after changing the pricing level, you are asked if you want to update the pricing. If you click **No**, the price remains what it was based on the old pricing level; if you click **Yes**, the pricing is updated. You will also get the price update warning if you open a job that was based on the old pricing level.

If Your Crouser Subscription Expires

Crouser subscriptions are renewable annually. Two weeks before the expiration date, you will receive a warning and be advised to contact Crouser & Associates to renew your subscription.

If your subscription expires:

- Crouser price lists will no longer be available in PrintSmith Vision. Only standard price lists will be available when you select **Pricing > List Price Schedules** or when you try to create a new list-based job.
- If you try to edit an existing job that was using a Crouser price list, you will get a price update warning. After the price is updated, the default price list will be used for the job.
- If you try to:
  - Convert an estimate to an invoice
  - Copy an invoice or estimate
  - Copy a job
  - Create an invoice or estimate from a template

  for which a Crouser price list was used, you are warned that Crouser pricing was used and asked if you want to update the pricing. If you click **No** when asked about updating the pricing, the original Crouser-based price is preserved; if you click **Yes** to update the pricing, the first standard price list is selected for the job and the price is updated accordingly.

Contact Crouser & Associates (as described on page 5) to renew your subscription.

Note	If you disable the integration (in the Integration preferences), users will no longer have access to the Crouser price lists and will be warned about their unavailability.