

PrintSmith™ Vision - Four51 Integration Guide

Version 3.4
July / 2016

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EFI Productivity Suite | *PrintSmith Vision - Four51 Integration Guide*

July 2016 PrintSmith Vision 3.4

Document Version 1.0

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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	<i>PrintSmith Vision - Installation and Upgrade Guide</i>
Setting up and using PrintSmith Vision	<i>PrintSmith Vision - Setup and User Guide</i>
Using PrintSmith Vision when it is EFI-hosted	<i>PrintSmith Vision - EFI-Hosted Guide</i>

If You Are Upgrading

Note If PrintSmith Vision is *EFI-hosted*, EFI takes care of the upgrade process for you, but you must still integrate PrintSmith Vision with Four51 after the upgrade and then familiarize yourself with the order workflow. *The upgrade process must be coordinated with EFI Support.*

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 18.
- 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

EFI Support

Web Site:	https://customer.efi.com/support
US Phone:	1.855.EFI.4HLP 480.538.5800
UK Phone:	+44 (0) 800.783.2737
EU Phone:	+49 (0) 2102.745.4500
E-Mail:	printsmith.support@efi.com

Regular US Service Desk hours are 7 A.M. to 5 P.M. Mountain Standard Time, Monday – Friday

Regular UK Service Desk hours are 8 A.M. to 5 P.M. Greenwich Mean Time, Monday – Friday

Regular EU Service Desk hours are 9 A.M to 6 P.M. Central European Time, Monday – Friday

Note For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

EFI Professional Services

US Phone:	651.365.5321
US Fax:	651.365.5334
E-Mail:	ProfessionalServicesOperations@efi.com

EFI Professional Services can help you perform EFI software installations, upgrades, and updates. This group can also help you implement, customize, and optimize your EFI software, plus offers a range of training options.



Setup

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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 18.

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 and/or link customer accounts in PrintSmith Vision to companies 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.

If EFI is hosting PrintSmith Vision for you, your license will be updated for you.

If you are hosting PrintSmith Vision, you will 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 18. 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**.

<input checked="" type="checkbox"/> Enable Four51 Integration	<input type="button" value="Reset"/>	<input type="button" value="Check Now"/>
Services URL	<input type="text" value="www.four51.com/services"/>	
Shared Secret	<input type="text" value="efisharedsecret"/>	
Site Key	<input type="text" value="ZAQY02UPGWJNFeGJ9yDE4a9sVJZm0OBk1MyO-pKt"/>	

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. You can also enter an Interop ID first in Four51 and then enter a matching SKU in PrintSmith – as long as the SKU is unique.

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 27.

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.

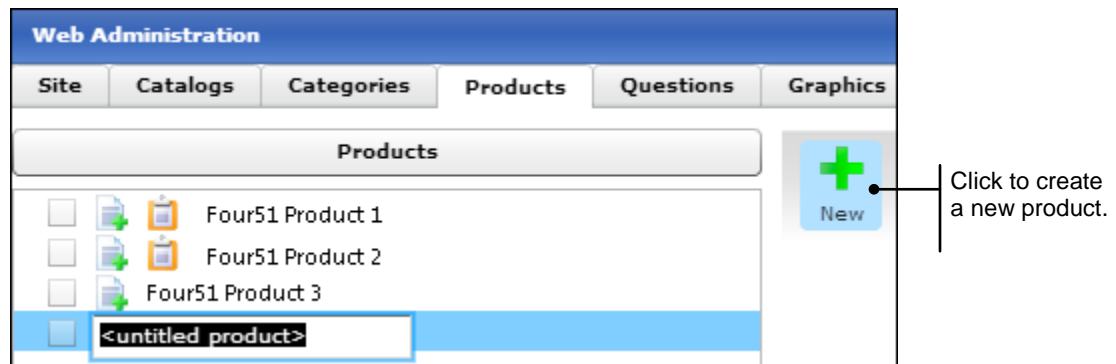
Define Web products in PrintSmith Vision

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.



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 this SKU in Four51 as the Interop ID as described in “Define and link products in Four51” below. Alternatively, you can enter an Interop ID in Four51 first and then enter the SKU in PrintSmith Vision – *as long as the SKU is unique*.

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.

The screenshot shows a product configuration interface. At the top, there is a 'Catalog' section with 'Test Catalog' selected and a 'Global Product' checkbox. Below this is the 'Name' field with 'Glossy Copies' entered. The 'Status' is 'NEW, No Template'. The 'SKU' field contains 'PS-SKU-21'. To the right of the SKU field is a 'Set Template' button. Below the SKU field is a 'Thumbnail' field with a dropdown arrow. At the bottom right is a 'Delete Template' button.

6. Leave the **Description** field blank; information from Four51 provides a description when buyers order the product. (See “About order/job descriptions” on page 23.) 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 27.

- 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-21**.

Note You can also assign the SKU (Interop ID) to the product in Four51 first, and then enter the same SKU in PrintSmith Vision, *as long as the SKU is unique*. See “Define Web products in PrintSmith Vision” on page 12.

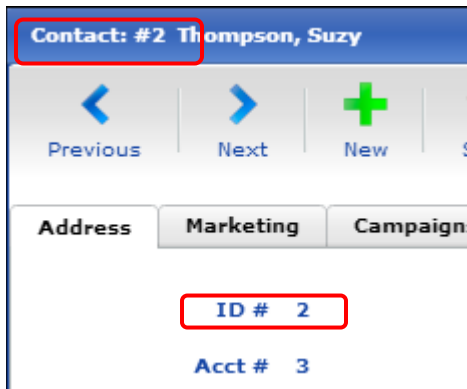
Task 4: Link Contacts and Accounts

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.

You can also link companies in Four51 to customer accounts in PrintSmith Vision. When a user for a linked company places an order in Four51, the order in PrintSmith Vision is automatically associated with the correct customer account.

Linking PrintSmith contacts to Four51 users

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.

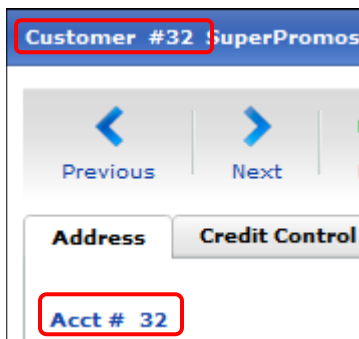


- In Four51, enter the PrintSmith contact ID in the **Interop ID** field for the user you are linking to the contact. For example, if the contact ID in PrintSmith is 2, you would enter 2 in the **Interop ID** field.

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 27.

Linking PrintSmith customer accounts to Four51 companies

A customer account in PrintSmith Vision is equivalent to a company in Four51. Each customer account in PrintSmith Vision has a unique number. This number is displayed in the title bar of the Customer window as well as on the **Address** tab.



- In Four51, enter the PrintSmith customer number in the **DUNS ID** field for the company you are linking to the customer account.

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.



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 (or customer account) in PrintSmith Vision*.
2. Place an order for a product *that is linked to a product in PrintSmith Vision*.

- 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. The **Web Reference** is always followed by **(Four51)** to make the source of the order clear.

Pending Documents					
	Pick Up	Account	Document No.	Document Title	Web Reference
<input type="radio"/>	Status	ORGANIC E	Inv P-175-S Inv	BC-2 - Alabam...	1222 (Four51)
<input type="radio"/>	Location	ORGANIC E	Inv P-176-S Inv	BC - Customerl...	324 (Four51)
<input type="radio"/>	Open	ORGANIC E	Inv P-177-S Inv	BC - Customerl...	3444 (Four51)
<input checked="" type="radio"/>	Notify	ORGANIC E	Inv P-178-S Inv	E-103 - Envelo...	34344 (Four51)
<input type="radio"/>	Due Date	ORGANIC E	Inv P-179-S Inv	pss255 [Interop...	1223 (Four51)
<input type="radio"/>	Deliver	ORGANIC E	Inv P-180-S Inv	BC - Dhina [PS-...	5655 (Four51)
<input type="radio"/>	Schedule	ORGANIC E	Inv P-183-S Inv	PS-SKU-7 [PS-...	1224 (Four51)
<input type="radio"/>		ORGANIC E	Inv P-186-S Inv	PS-SKU-7 [PS-...	1225 (Four51)

- 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, as well as in the bottom left of the Invoice window.
 - 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 includes the shipping charges and tax calculated in Four51. The shipping charge is reflected in the **Shipping** line on the invoice, but the tax is always calculated in PrintSmith Vision.

Four51 order number

Tip You can 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 **Date Needed** if one was specified in Four51 when the order was placed. (Otherwise, you must enter a **Wanted by** date.)
 - The **Special Instructions** field shows the shipping charges and tax calculated in Four51 (the same as in the Invoice window).
 - The **Customer Comment** field shows any comments entered when the order was placed.

Special Instructions
Four51 order ID : 1225 Shipping Amount : 170.00 Tax Details: Tax Amount : 0
Customer Comment
Need by Jan 26 at latest

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 example, you may see the product specifications. This information can be copied to the job ticket. For information about the Web Worksheet, see page 24.

Web Worksheet	
Check off items that you've added to the job or move an item to job ticket notes by clicking item description and clicking the 'Copy' button. Checked off items are deleted when OK is clicked.	
Done	Description
<input type="checkbox"/>	Ship To: Super Designs, Attn: Suzy Jones, 1 Ivy Lane , Cambridge MA 02138 US
<input type="checkbox"/>	lineItemID: WfIwDWijNqA96LxX44CjfqnDqeKoUUzwDuJjNT9RJI-pHvii8dubgUQ-e-e
<input type="checkbox"/>	productType: Static
<input type="checkbox"/>	quantityMultiplier: 1
<input type="checkbox"/>	costCenter: Finance

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

Important If PrintSmith Vision is *EFI-hosted*, EFI takes care of the upgrade process for you. You must still, however, complete Tasks 2 and 3 below.

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

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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 27.
- 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 27.
- If the order was placed by a Four51 user who is not linked to a contact or account in PrintSmith Vision, the order is assigned to the walk-in account. See “Orders Placed by Users Without PrintSmith Contact IDs” on page 27.
- An order placed for a Four51 company with DUNS id = Sandbox-9999 does *not* come into PrintSmith Vision. The Web Connection window (see “Troubleshooting” on page 28) will indicate the order was rejected.

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 and bottom left of 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 24.
5. Produce the job as usual and generate a delivery ticket. For information about delivery tickets, see page 27.
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.

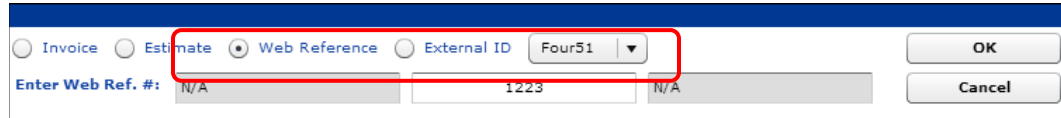
PrintSmith Vision sends a request for orders to Four51 every five minutes so you can expect updates to the pending list at those intervals. If **Document Type** in the Pending Documents window is set to **Web Orders**, a “throbber” is displayed whenever the request for orders is made. (You may not see this unless the request is being made while you are viewing the window.)

Pending Documents					
	Pick Up	Account	Document No.	Document Title	Web Reference
<input type="radio"/>	Status	ORGANIC E	Inv P-175-S Inv	BC-2 - Alabam...	1222 (Four51)
<input type="radio"/>	Location	ORGANIC E	Inv P-176-S Inv	BC - Customerl...	324 (Four51)
<input type="radio"/>	Open	ORGANIC E	Inv P-177-S Inv	BC - Customerl...	3444 (Four51)
<input checked="" type="radio"/>	Notify	ORGANIC E	Inv P-178-S Inv	E-103 - Envelo...	34344 (Four51)
<input type="radio"/>	Due Date	ORGANIC E	Inv P-179-S Inv	pss255 [Interp...	1223 (Four51)
<input type="radio"/>	Deliver	ORGANIC E	Inv P-180-S Inv	BC - Dhina [PS-...	5655 (Four51)
<input type="radio"/>	Schedule	ORGANIC E	Inv P-183-S Inv	PS-SKU-7 [PS-...	1224 (Four51)
<input type="radio"/>		ORGANIC E	Inv P-186-S Inv	PS-SKU-7 [PS-...	1225 (Four51)

Invoice window

Open the invoice as usual. For example:

- Open the invoice from the Pending Documents window.
- 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 price is locked.

- The title bar of the window includes the Four51 order number. The order number is also displayed in the lower left corner.
- 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.
- 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 order number, as well as shipping amount and taxes. The shipping charge is reflected in the **Shipping** line on the invoice, but the tax is always calculated in PrintSmith Vision.

About order/job descriptions

The order/job description for orders coming from Four51 always includes the following:

- Product ID. This is always the first part of the description, for example, **E103 – Envelopes** in the figure below.
- Product name. This is always in square brackets, for example, **[10 x 13 Envelope]** in the figure below.
- Cost center. This is always the last item in the description, for example, **Marketing** in the figure below.

Description	E-103 - Envelopes [10 x 13 Envelope]Marketing
--------------------	---

In addition, the description may include the following:

- A variant if the order was for a particular customer, for example, **CustomerName2** in the figure below. The variant always follows the product ID.
- An InteropID (SKU), for example, **PS-SKU-19** in the figure below. The SKU precedes the product name in square brackets.

Description	BC - CustomerName2 [PS-SKU-19 - Business Card W/Backer]Finance
--------------------	--

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 title is the order description with information from Four 51. See above.
- 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** field is automatically filled in with the date from the order; the **Wanted by** date is the **Date Needed** if one was specified in Four51 when the order was placed. (You may need to select a **Wanted by** date.)
- The **Special Instructions** field shows the shipping charges and tax calculated in Four51 (the same as in the Invoice window).
- The **Customer Comment** field shows any comments entered when the order was placed.

Special Instructions
Four51 order ID : 1225 Shipping Amount : 170.00 Tax Details: Tax Amount : 0
Customer Comment
Need by Jan 26 at latest

Tip If you want the **Taken by** field to provide 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, if **Taken by** is defined as **System**, all orders that come from Four51 are taken by **System**.

Taken by	System
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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 shipping and 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.

Notes The information in the Job window is based on the template you associated with the Web product in PrintSmith Vision. 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 job **Description** is based on information from Four51, as described in “About order/job descriptions” on page 23.

Web WorkSheet	
Check off items that you've added to the job or move an item to job ticket notes by clicking item description and clicking the 'Copy' button. Checked off items are deleted when OK is clicked.	
Done	Description
<input type="checkbox"/>	Ship To: Super Designs, Attn: Suzy Jones, 1 Ivy Lane , Cambridge MA 02138 US
<input type="checkbox"/>	lineItemID: Wf1wDWijNqA96LxX44CjfqnDqeKoUUzwDuJjNT9RJI-pHvii8dubgUQ-e-e
<input type="checkbox"/>	productType: Static
<input type="checkbox"/>	quantityMultiplier: 1
<input type="checkbox"/>	costCenter: Finance

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

Web Worksheet contents

The Web Worksheet window may include the following:

- The shipping address for the order.

Ship To: Super Designs, Attn: Suzy Jones, 1 Ivy Lane , Cambridge MA 02138 US

- The cost center to be charged for the order.

costCenter: Finance

- Production specifications for the product, for example, size, number of inks, colors, or fonts. Typically you would copy this to the job ticket as described in "Copying items from the Web worksheet to the job ticket" on page 26.

<input type="checkbox"/>	ProductSpecs-Size: 2 x 3-1/2
<input type="checkbox"/>	ProductSpecs-# of Inks: 1

- 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.

File: <http://www.four51.com/ui/variableimage/PDFO/livq58EXgfE6vVa3WiwsVh-pQ-e-e.pdf>

When a URL is listed in the Web Worksheet window, you can also preview the content file in the Digital Assets window. Click **Digital Assets** under **Commands** in the Job window, select the file in the Digital Assets window, and click **Show Preview**.

Digital Assets			
Name	File Form	Repository Path	Date
livq58EXgfE6vVa3WiwsVh-pQ-e-e...	pdf	http://www.four51.com/ui/variableimage/...	1/19/2016 4:40

Cancel OK Remove Add Show Preview

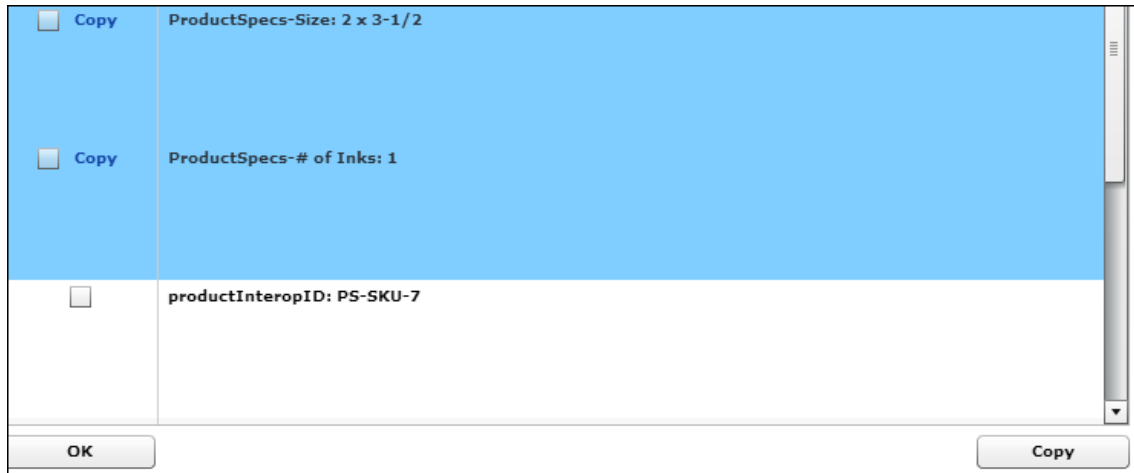
- A price adjustment indicating whether the price for the product on the site was higher or lower than that in PrintSmith Vision. A positive number indicates the price on the site was higher; a negative number indicates it was lower. You can use this information to adjust your pricing on either side 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.)

Price adjusted by "3000.0" to match published WEB price

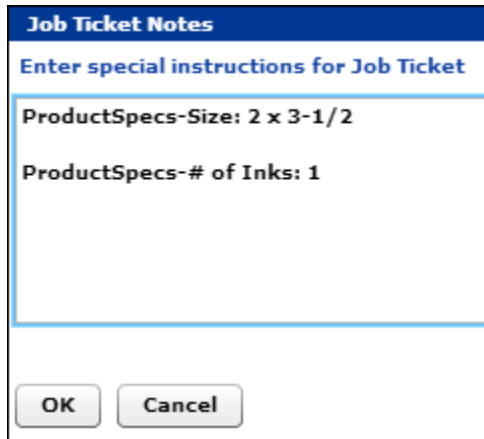
Copying items from the Web worksheet to the job ticket

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.

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.



3. Select the check boxes of the items with **Copy** next to them and click **OK**. The selected items are removed from the Web worksheet and copied to the Job Ticket Notes window. Here you can click **OK** to add them to the job ticket.



Delivery Ticket Window

When generating a delivery ticket for a Four51 order, the shipping information entered by the buyer is displayed on the **Deliver Where** tab.

If the buyer entered comments when placing the order, they are displayed in the Delivery Comments field on the **Deliver How** tab.

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.

Orders Placed by Users Without PrintSmith Contact IDs

When a user places an order, and is not linked to a PrintSmith Vision contact or account, 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)
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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**.

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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