PrintSmith™ Vision 3.4.1 – Digital StoreFront® 9.2 Integration

This document summarizes what you can expect when using PrintSmith Vision and Digital StoreFront together.

Note	The information in this document is for the eFlow-based integration introduced in PrintSmith Vision 3.4 and Digital StoreFront 9.2.

PrintSmith Vision and Digital StoreFront

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

EFI Digital StoreFront is an online storefront where your customers can order print products and services. You can offer a variety of products – including booklets, manuals, business cards, brochures, sell sheets, flyers, and postcards – most of which buyers can customize with a wide selection of printing and finishing options that you offer.

PrintSmith Vision and Digital StoreFront work together. As orders are placed on your Digital StoreFront site, they are sent to PrintSmith Vision. As orders come into PrintSmith Vision, the production workflow is then managed in PrintSmith Vision based on information included in the order. Status information about orders is sent back to Digital StoreFront.

Pricing

PrintSmith Vision and Digital StoreFront use different approaches for pricing products.

In PrintSmith Vision: Pricing is item-specific with many production variables affecting the price calculations. For example, the copier or digital press used for the job, and the stock and charges that make up a job all affect the final price. A job price can also be marked up or down for particular buyers.

In Digital StoreFront: Pricing is buyer-specific and defined in price sheets, which can include tiered (quantity-based) and special pricing. When buyers make purchases on your Digital StoreFront site, the product prices come directly from the price sheet for the buyer's print shop or company.

No job production costs are defined or tracked in Digital StoreFront. In PrintSmith Vision, however, you can specify your costs (and then see how they compare to your sales prices).

Important points about pricing

- The pricing for products set in Digital StoreFront will override any pricing defined in PrintSmith Vision. (The pricing includes media and print services.) When an order comes into PrintSmith Vision from Digital StoreFront, the price of the product is fixed since the buyer has already paid for the order. If you change any job specifications for a Web order in PrintSmith Vision (for example, select different paper), the product price remains unaffected.

- If you want to offer the same product on your Digital StoreFront site and to buyers who walk into your print shop, be aware that the price of the product on the site and the price of the product in the print shop might be different because Digital StoreFront and PrintSmith Vision calculate pricing differently. At any time, however, you can see the price difference in PrintSmith Vision (in the Web worksheet).

- Although you can take some steps in PrintSmith Vision to align pricing with the pricing defined on your Digital StoreFront site, the prices might not match exactly. For example, for digital work, you would need to use the copy cost method with no interpolation or step tables, and not give discounts or markups to buyers; for large format work, you would need to use the finish size (and no interpolation).

- If a product is defined only in Digital StoreFront (is not mapped to a PrintSmith product), the price the buyer paid comes through as a price adjustment. Because no pricing is available in PrintSmith Vision, this "adjustment" is the actual price.

Accounts and Contacts

A *customer account* in PrintSmith Vision is equivalent to a *company* in Digital StoreFront. A *contact* in PrintSmith Vision is a *user* in Digital StoreFront. Users are the buyers on the storefront.

Accounts and contacts must always be managed from PrintSmith Vision. You register accounts and contacts so that companies and users are created in Digital StoreFront. You can also update and unregister accounts and contacts from PrintSmith Vision.

If you add, edit, or delete a company or user in Digital StoreFront, that information is not sent to PrintSmith Vision – you must always manage the accounts (companies) and contacts (users) from PrintSmith Vision.

If a user who is not associated with a registered company places an order on your Digital StoreFront site, the order will come into PrintSmith Vision as a walk-in order.

Products

Products are always created and priced in Digital StoreFront. In PrintSmith Vision, you then map these products to PrintSmith Vision Web products (and their associated job templates).

You can map each of your Web products in PrintSmith Vision to *one or more* Digital StoreFront products. For example, on the Web site you may offer several types of business cards, but they are all produced the same way. You can therefore map all the business card products to a single business card Web product in PrintSmith Vision.

When a buyer orders a product on the Digital StoreFront site, and the product is mapped to a PrintSmith Vision Web product, some information about the job is automatically available from the template assigned to the PrintSmith Vision Web product. Digital StoreFront sends additional production information to PrintSmith as part of the order, and this is used along with the template to produce the job.

Your buyers can, of course, order any product on your site, not just those mapped to products in PrintSmith Vision. When a buyer places an order for a product that is *not* mapped to a PrintSmith product, the order comes through as an outside service (buyout) job in PrintSmith Vision, and all the production information for the job comes from Digital StoreFront. You then use this information to produce the job.

Stocks

Stocks are known as media in Digital StoreFront. You can control all your stocks from PrintSmith Vision by registering them as media in Digital StoreFront.

After you register stocks, you then price the corresponding media in Digital StoreFront and add the media to ticket templates. When buyers place an order for a product, the available media selections will be based on the ticket template associated with the product.

When a Digital StoreFront order comes into PrintSmith Vision and includes a registered stock, the stock is "recognized," and information (for example, costing or inventory tracking) is available for it. The price of the stock, however, always comes from Digital StoreFront (and overrides the price of the mapped stock in PrintSmith Vision).

Shipping Methods

Shipping methods are known as delivery methods in Digital StoreFront . Just as with stocks, you can register shipping methods to create delivery methods in Digital StoreFront.

The registered shipping methods must then be priced in Digital StoreFront. You must also associate the shipping methods with your print shop and optionally your companies so they are available to buyers during checkout. It is a good idea to set up estimated shipping in Digital StoreFront so buyers are notified during checkout that the shipping amount is an estimate. The shipping amount is then finalized in PrintSmith Vision.

When a registered shipping method is selected for a Digital StoreFront order, the method is automatically displayed in the **Ship Via** field in various places in PrintSmith Vision so you can easily see what the buyer selected.

Print Services

Digital StoreFront includes numerous print services and options such as binding or folding that you can add to a ticket template. In turn, you associate a ticket template with print products in Digital StoreFront. (Typically a template is associated with multiple products that share similar characteristics.)

When buyers order products, the print services they can choose depend on the ticket template that was associated with the product.

In PrintSmith Vision you can map the print services to finishing charges. As a result, when a buyer selects a print service like blue coil binding for the job, and this print service is mapped to a blue coil binding finishing charge in PrintSmith, the invoice for the order will automatically have this print service/finishing charge included as a line item. If a print service is not mapped to a charge, it is not a line item in the invoice, but is listed on the Web worksheet.

Notes	The price for a print service in the job always comes from Digital StoreFront and overrides the price of the corresponding charge in PrintSmith Vision.
	If you are also integrated with a Fiery, mapped print services can ensure that the Fiery gets finishing instructions.

Communication

What is sent from Digital StoreFront

When a Web order comes into PrintSmith Vision from Digital StoreFront, an invoice is created for it automatically, and Digital StoreFront sends the following information to PrintSmith:

- Order and due dates
- Order number
- Order total (and breakdown of pricing)
- Shipping and billing addresses
- Shipping amount and handling fee (reflected in the **Shipping** line of the invoice)
- Rush fee (added to the invoice total)

Note	In a multi-job order, the rush fee is added to the first job in the order. If this job is deleted, the rush fee is lost.

- Special and delivery instructions
- Payment method and amount
- Print (production) specifications selected by the buyer on the site (for example, media/stock or binding)

Note	Typically, you would copy the print specifications to the job ticket in PrintSmith Vision so the job can be produced as the buyer requested.

- URLs for content files that were uploaded to the site

Status updates

Certain events in PrintSmith Vision trigger a change to the order status in Digital StoreFront:

- When a production location is selected in PrintSmith Vision for a Digital StoreFront order, for example, Design or Bindery, the status of the order in Digital StoreFront changes to **In production**.

  Note   If an order includes more than one job, the timing of the status change to **In Production** depends on how **Status changes for jobs and multipart orders** is set in Digital StoreFront (**Site Settings > Basic Settings**).

- When an invoice is marked **Ready for pickup**, or all the jobs in a delivery ticket are marked as **Delivered** (on the **Status** tab in the Delivery Ticket window in PrintSmith Vision), the status of the order in Digital StoreFront changes to **Shipped**.

- If you cancel an invoice in PrintSmith Vision *before* marking it ready for pickup or marking jobs as delivered, the status of the order in Digital StoreFront changes to **Canceled**.

  Note   Once the status of an order in Digital StoreFront is **Shipped**, it cannot be canceled. If you do need to cancel the order, and a credit card payment was involved, you must reverse it manually (either in Digital StoreFront or on the payment gateway).

- If the payment method was *not* a credit card, when an invoice in PrintSmith Vision is picked up and posted, the status of the order in Digital StoreFront changes to **Invoiced and Completed**. If the payment amount in PrintSmith Vision changed (due to taxes or adjustments to shipping), this will be reflected in Digital StoreFront.

- If the buyer selected a credit card as the payment method, Digital StoreFront contacts a payment gateway (configured in Digital StoreFront) to authorize the credit card payment, but the credit card is not charged when the order is placed. After the invoice is marked ready for pick up, the status of the order in Digital StoreFront changes to **Shipped**, but the card is not charged yet. When you pick up and post the invoice in PrintSmith Vision, the credit card is now charged the final invoice amount (as calculated in PrintSmith Vision) and the status of the order in Digital StoreFront changes to **Invoiced and Completed**.

  Note   Digital StoreFront handles both the authorization and charging of a credit card, but the final charge amount comes from PrintSmith Vision.