Table of Contents

Introduction ................................................................................................................... 5
PrintSmith Vision and Digital StoreFront ........................................................................... 6
About Pricing ................................................................................................................... 6
About This Guide ............................................................................................................. 7
Additional Sources ......................................................................................................... 7
If You Are Upgrading ...................................................................................................... 7
Contact Information ....................................................................................................... 7

Setup for New Integrations ............................................................................................ 9

Overview of Setup for New Integrations ......................................................................... 10
Task 1: Meet System Requirements ................................................................................. 10
Task 2: Check Your Digital StoreFront License for MIS Integration ............................... 10
Task 3: If Digital StoreFront Is Customer-Hosted Edit the Registry ................................. 11
Task 4: Establish eFlow-Based Communication Channel ............................................... 13
  If both PrintSmith Vision and Digital StoreFront are EFI-hosted .................................. 13
  If both PrintSmith Vision and Digital StoreFront are customer-hosted .......................... 13
  If PrintSmith Vision is customer-hosted and Digital StoreFront is EFI-hosted ............... 15
Task 5: Configure a PrintSmith Vision MIS in Digital StoreFront ................................. 16
Task 6: Associate MIS with Print Shop and Define Print Shop Settings ......................... 19
Task 7: Set Integration Preferences to Establish a Connection ....................................... 21
Task 8: Set Up Single Sign On from PrintSmith to Digital StoreFront .......................... 23
Task 9: Register Accounts and Contacts in Digital StoreFront ...................................... 25
  Method 1: Register a contact and automatically register the account ............................ 25
  Method 2: Register individual accounts and their contacts .......................................... 27
  Method 3: Register multiple accounts in one step ....................................................... 29
  Updating accounts and contacts .................................................................................. 31
  Unregistering accounts and contacts ......................................................................... 32
  If an item fails to transmit ............................................................................................ 32
Task 10: Register Stocks in Digital StoreFront ............................................................... 34
  Method 1: Register multiple stocks at a time ............................................................... 34
  Method 2: Register one stock at a time ....................................................................... 35
  Price media and add to ticket templates .................................................................... 36
  Updating stocks .......................................................................................................... 37
  Unregistering stocks ................................................................................................... 37
Task 11: Register Shipping Methods in Digital StoreFront ........................................... 39
  Register shipping methods .......................................................................................... 39
  Price shipping methods and associate with your print shop ......................................... 39
  Unregistering shipping methods ................................................................................ 40
Task 12: Map Products ................................................................................................. 41
  Define products in Digital StoreFront ........................................................................ 41
  Send the products to PrintSmith Vision ...................................................................... 42
  Map products in PrintSmith Vision ............................................................................ 42
Task 13: Map Print Services to PrintSmith Vision Finishing Charges ............................ 44
  Map print services to charges .................................................................................... 45
  Updating charges ........................................................................................................ 47

Contact Information ....................................................................................................... 7
If you create custom print services in Digital StoreFront .................................................. 48
Deleting print services ........................................................................................................ 48
About special pages ............................................................................................................. 49
Task 14: (Optional) Define Value for "Taken by" ................................................................. 49
Task 15: (Optional) Define Receive State .............................................................................. 49
Next Steps ............................................................................................................................ 50

Upgrading ........................................................................................................................................ 51

Overview .............................................................................................................................. 52
Task 1: Meet System Requirements ....................................................................................... 53
Task 2: Establish an eFlow-Based Communication Channel ............................................... 53
Task 3: Edit Your PrintSmith Vision MIS .............................................................................. 53
Task 4: Set Integration Preferences to Establish a Connection ........................................... 53
Task 5: Synchronize Contacts ............................................................................................... 54
Task 6: Synchronize Products and Review Product Mapping ............................................... 55
Task 7: Register Stocks in Digital StoreFront ....................................................................... 55
Task 8: Register Shipping Methods in Digital StoreFront.................................................... 56
Task 9: Map Print Services to Finishing Charges .................................................................. 56
Task 10: Set Up Single Sign On from PrintSmith to Digital StoreFront .................................. 56
Next Steps ............................................................................................................................ 56

Order Workflow ...................................................................................................................... 57

Overview .............................................................................................................................. 58
Pending Documents Window .................................................................................................. 59
Invoice Window .................................................................................................................... 60
Account Info Window ........................................................................................................... 61
Web Worksheet and Job Windows ........................................................................................... 63
  Web Worksheet window ....................................................................................................... 63
  Digital assets ....................................................................................................................... 65
  Job window ........................................................................................................................ 66
  Special pages ..................................................................................................................... 67
Delivery Ticket Window ........................................................................................................ 68
Orders for Unmapped Products ............................................................................................. 68
Completing the Process in PrintSmith Vision ....................................................................... 69
What Gets Updated in Digital StoreFront? ............................................................................ 69
  When you select a production location ............................................................................... 69
  When you indicate an invoice is ready for pickup .............................................................. 70
  When you indicate jobs were delivered ............................................................................. 70
  If you cancel an invoice ..................................................................................................... 70
  When you pick up and post an invoice ............................................................................. 71
Credit Card Workflow .............................................................................................................. 71
Troubleshooting ...................................................................................................................... 72

Index ....................................................................................................................................... 73
Introduction

In this chapter

PrintSmith Vision and Digital StoreFront 6
About Pricing 6
About This Guide 7
Additional Sources 7
If You Are Upgrading 7
Contact Information 7
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 on the storefront – 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 and paid for on your Digital StoreFront site, information about the orders is sent to 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. PrintSmith Vision then sends information about the status of orders to Digital StoreFront.

About Pricing

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

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. Price sheets include products, media, print services, and shipping.

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.

Note the following:

- The product pricing set in Digital StoreFront always overrides any pricing defined in PrintSmith Vision.
- When an order comes into PrintSmith Vision from your Digital StoreFront site, the price of the product(s) 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 a different stock), the product price remains unaffected.
- Whenever an order comes in from the site, you can see (in the Web worksheet for the job) whether the price the buyer paid was higher or lower than the price in PrintSmith Vision. You can use this information to adjust the product pricing in either Digital StoreFront or PrintSmith Vision if you want.
- 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 calculate pricing differently. At any time, however, you will be able to see the price difference in PrintSmith Vision (in the Web worksheet).
- Although you can take some steps in PrintSmith to align pricing with the pricing in Digital StoreFront, the prices might not match exactly. For example, for digital work, you can only use the copy cost method with no interpolation or step tables, and not give discounts or markups to buyers; for large format work, you must use the finish size (and no interpolation).
- If a product in Digital StoreFront has no pricing defined, it automatically results in a “request for quote” when ordered on the site. In this case, the buyer is sent a quote for acceptance or rejection. If the buyer accepts the quote, the buyer pays for the order, and the order is sent to PrintSmith Vision. The quote process takes place entirely on the Digital StoreFront side.

Note: Although the pricing you define in PrintSmith Vision is not used for Web 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.
About This Guide

This guide explains how to set up PrintSmith Vision with Digital StoreFront, what takes place when buyers 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 and Digital StoreFront are already set up and focuses on how to integrate and use the two products.

Additional Sources

<table>
<thead>
<tr>
<th>For information about</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setting up and managing Digital StoreFront</td>
<td>Digital StoreFront Installation Guide and online Help on the site</td>
</tr>
<tr>
<td>Installing PrintSmith Vision</td>
<td>PrintSmith Vision - Installation and Upgrade Guide</td>
</tr>
<tr>
<td>Setting up and using PrintSmith Vision</td>
<td>PrintSmith Vision - Setup and User Guide</td>
</tr>
<tr>
<td>Using the Web site</td>
<td>Online Help</td>
</tr>
<tr>
<td></td>
<td>Digital StoreFront User Guide (which you can customize for your print buyers)</td>
</tr>
</tbody>
</table>

If You Are Upgrading

If you were integrated with Digital StoreFront using an earlier version of PrintSmith Vision (pre-3.4), you must update your integration in order to take advantage of the new eFlow-based integration introduced in PrintSmith Vision 3.4 and Digital StoreFront 9.2. For upgrade instructions, see “Upgrading” on page 51.

Contact Information

EFI Support

<table>
<thead>
<tr>
<th>Web Site:</th>
<th><a href="https://customer.efi.com/support">https://customer.efi.com/support</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>US Phone:</td>
<td>1.855.EFI.4HLP 480.538.5800</td>
</tr>
<tr>
<td>UK Phone:</td>
<td>+44 (0) 800.783.2737</td>
</tr>
<tr>
<td>EU Phone:</td>
<td>+49 (0) 2102.745.4500</td>
</tr>
<tr>
<td>E-Mail:</td>
<td><a href="mailto:printsmith.support@efi.com">printsmith.support@efi.com</a></td>
</tr>
</tbody>
</table>

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 for New Integrations

In this chapter

Overview of Setup for New Integrations 10
Task 1: Meet System Requirements 10
Task 2: Check Your Digital StoreFront License for MIS Integration 10
Task 3: If Digital StoreFront Is Customer-Hosted Edit the Registry 11
Task 4: Establish eFlow-Based Communication Channel 13
Task 5: Configure a PrintSmith Vision MIS in Digital StoreFront 16
Task 6: Associate MIS with Print Shop and Define Print Shop Settings 19
Task 7: Set Integration Preferences to Establish a Connection 21
Task 8: Set Up Single Sign On from PrintSmith to Digital StoreFront 23
Task 9: Register Accounts and Contacts in Digital StoreFront 25
Task 10: Register Stocks in Digital StoreFront 34
Task 11: Register Shipping Methods in Digital StoreFront 39
Task 12: Map Products 41
Task 13: Map Print Services to PrintSmith Vision Finishing Charges 44
Task 14: (Optional) Define Value for “Taken by” 49
Task 15: (Optional) Define Receive State 49
Next Steps 50
Overview of Setup for New Integrations

Important The instructions in this chapter apply to those who are new to Digital StoreFront.
If you were already using Digital StoreFront with an earlier version of PrintSmith Vision, see the upgrade instructions that begin on page 51.

The process of setting up PrintSmith Vision with Digital StoreFront involves these tasks.

1. Make sure you meet system requirements.
2. In Digital StoreFront, make sure you are licensed for integration with an MIS (PrintSmith Vision).
3. If Digital StoreFront is customer-hosted, edit the registry.
4. In Digital StoreFront, define an eFlow-based communication channel. (When PrintSmith Vision is customer-hosted, eFlow must be installed locally.)
5. In Digital StoreFront, create a PrintSmith Vision MIS.
6. In Digital StoreFront, associate this MIS with a print shop and define some print shop settings.
8. (Optional) Set up single sign on (SSO) from PrintSmith Vision to Digital StoreFront.
9. Register accounts and contacts in PrintSmith Vision as companies and users in Digital StoreFront.
10. Register stocks in PrintSmith Vision as media in Digital StoreFront.
11. Register shipping methods in PrintSmith Vision as delivery methods in Digital StoreFront.
12. Map products between PrintSmith Vision and Digital StoreFront.
13. Map print services to finishing charges.
14. (Optional) Define a “taken by” value.
15. (Optional) Define a receive state for orders.

Details of these tasks follow.

Task 1: Meet System Requirements

To take advantage of the enhanced eFlow-based integration between PrintSmith Vision and Digital StoreFront, the following versions of the products are required:

- PrintSmith Vision 3.4.1 or higher
- Digital StoreFront 9.2 or higher
- If PrintSmith Vision is customer-hosted (you are hosting), eFlow is required. See “eFlow installation requirements” on page 13.

Task 2: Check Your Digital StoreFront License for MIS Integration

To use Digital StoreFront with an MIS like PrintSmith Vision, you must be licensed to do so.

1. Log into Digital StoreFront as an administrator.
2. Go to Administration > Licensing.
3. Make sure the EFI MIS Connector check box is selected.
4. If the EFI MIS Connector check box is selected, you are licensed to use an MIS with Digital StoreFront; continue with Task 3 below.
   If the EFI MIS Connector check box is not selected, contact your EFI Sales Representative to purchase a license.
Task 3: If Digital StoreFront Is Customer-Hosted Edit the Registry

When Digital StoreFront is customer-hosted, before you can establish a communication channel between Digital StoreFront and PrintSmith Vision (in Task 4), you must edit the registry to grant full control to some certificate entries.

1. Start the Registry Editor (regedit).
2. Go to HKEY_LOCAL_MACHINE > Software > WOW6432Node > Electronics for Imaging > DSF > Certification and do the following:
   a. Right-click Certification and choose Permissions.

   ![Registry Editor Permissions window]

   b. Add the local computer accounts ASPNET and IUSR, select the Allow check box for Full Control, and click Apply for each of these.
3. Go to HKEY_LOCAL_MACHINE > SOFTWARE > WOW6432Node > Microsoft > SystemCertificates > ROOT and do the following:
   a. Right-click ROOT and choose Permissions.

   ![Registry Editor Permissions window]

   b. Add the local computer accounts ASPNET and IUSR, select the Allow check box for Full Control, and click Apply for each of these.
   c. Click Advanced.
d. Select the Replace all child object permissions with inheritable permissions from this object check box and click Apply.

4. Click OK and close regedit.
Task 4: Establish eFlow-Based Communication Channel

All communication between PrintSmith Vision and Digital StoreFront is handled by eFlow. What you need to install and configure depends on where PrintSmith Vision and Digital StoreFront are hosted (reside). Three scenarios are possible:

- PrintSmith Vision and Digital StoreFront are both hosted by EFI. See below.
- PrintSmith Vision and Digital StoreFront are both customer-hosted (you are hosting). See below.
- PrintSmith Vision is customer-hosted and Digital StoreFront is EFI-hosted. See page 13.

If both PrintSmith Vision and Digital StoreFront are EFI-hosted

If is EFI is hosting both PrintSmith Vision and Digital StoreFront, eFlow is installed for you in the EFI Hosting Center. EFI will provide you with the eFlow URL so you can define the communication channel as follows.

1. Log into Digital StoreFront as an administrator.
2. Go to Administration > MIS CONFIGURATION > Manage Communication Channels.
3. Click Add New Channel.
4. In the Type field, select eFlow.
5. Enter a Name for the channel (up to 13 characters) and optionally enter a Description.

   Note After you register the communication channel, the system adds an _ (underscore) followed by the site GUID (an identifier for your Digital StoreFront installation) to the Name you entered. If you enter a name with more than 13 characters, the extra characters will be removed.

6. In the Configuration Url field, enter the eFlow URL you were given by EFI.
7. Click Register.
8. Click Subscribe.

If both PrintSmith Vision and Digital StoreFront are customer-hosted

If you are hosting both PrintSmith Vision and Digital StoreFront, you must install eFlow at your facility before you can establish a communication channel.

Important Be sure you completed “Task 3: If Digital StoreFront Is Customer-Hosted Edit the Registry” on page 11 before you try to establish a communication channel.

eFlow installation requirements

You must install eFlow on a Windows computer that meets the following requirements:

- Windows 8, Windows 10, or Windows 2012 Server R2 Standard or Essentials
- Static IP address

Warning Although you can install eFlow on the PrintSmith Vision server (if it is a Windows computer with a static IP address), a separate computer is strongly recommended. You will require technical assistance if you try to install eFlow and PrintSmith Vision on the same computer.
Install eFlow

1. Obtain the eFlow Installer as directed by your EFI representative.

2. Start the Installer.
   
   **Note** Make sure you are running the installer as an administrator. If you are not an administrator, right-click the `install.exe` file and select `Run as Administrator`.

3. Follow the instructions in the Installer being sure to accept the default location (C:\eFlow) in the Choose Installer Folder window.

**Tip** To log into eFlow, in Windows select Start > All Programs > eFlow > Login to eFlow (which you may want to bookmark for future use). The User Name and Password are both `admin`.

Define the eFlow channel in Digital StoreFront

After you install eFlow, you can define an eFlow channel in Digital StoreFront. To do so, you must have the URL of your local eFlow installation.

1. Obtain your local eFlow URL:
   
   a. On the computer where you installed eFlow, select Start > All Programs > eFlow > Login to eFlow
   
   **Tip** You may want to bookmark the eFlow login page for future use.
   
   b. Enter admin as the User Name and admin as the Password and click Login.
   
   c. Note the URL (IP address) that is displayed. It should end with `view=home` and be similar to this:

   ![eFlow URL](image)

2. Log into Digital StoreFront as an administrator.

3. Go to Administration > MIS CONFIGURATION > Manage Communication Channels.

4. Click Add New Channel.

5. In the Type field, select eFlow.

6. Enter a Name for the channel (up to 13 characters) and optionally enter a Description.

   **Note** After you register the communication channel, the system adds an _ (underscore) followed by the site GUID (an identifier for your Digital StoreFront installation) to the Name you entered. If you enter a name with more than 13 characters, the extra characters will be removed.

7. In the Configuration Url field, enter your local eFlow URL (see step 1c above).

   **Notes** Keep in mind the IP address must be static as described in "eFlow installation requirements" on page 13. Currently only HTTP is supported.

8. Click Register.
When you click **Subscribe**, a set of WEB2PRINT topics is created in eFlow. These topics make the exchange of information possible between Digital StoreFront and the MIS you will configure next. You can see these topics if you click **TOPICS** in eFlow (but do *not* do anything except look at them).

**If PrintSmith Vision is customer-hosted and Digital StoreFront is EFI-hosted**

If you are hosting PrintSmith Vision, but EFI is hosting Digital StoreFront, you will need to install eFlow locally in order to communicate with a Super eFlow installed for you in the EFI Hosting Center. EFI will give you the URL of the Super eFlow so you can enter it in step 7 below.

1. Be sure you meet the “eFlow installation requirements” on page 13.
2. Install your local eFlow by following the instructions in “Install eFlow” on page 14.
3. Log into Digital StoreFront as an administrator.
4. Go to **Administration > MIS CONFIGURATION > Manage Communication Channels**.
5. Click **Add New Channel**.
6. In the **Type** field, select **Super eFlow**.
7. Enter a **Name** for the channel (up to 13 characters) and optionally enter a **Description**.
   
   **Note** After you register the communication channel, the system adds an underscore followed by the site GUID (an identifier for your Digital StoreFront installation) to the **Name** you entered. If you enter a name with more than 13 characters, the extra characters will be removed.
8. In the **Configuration Url** field, enter the Super eFlow URL you were given by EFI.
9. Click **Register**.
10. Click **Subscribe**.

When you set the Integration preferences in PrintSmith Vision (see page 21), you will indicate that your local eFlow is connected to a Super eFlow.
Task 5: Configure a PrintSmith Vision MIS in Digital StoreFront

The next task is to create and configure your PrintSmith Vision MIS in Digital StoreFront.

The steps are the same except when Digital StoreFront is EFI-hosted and PrintSmith Vision is customer-hosted. In this case you have one additional field to complete, for which you must obtain a client ID from your eFlow installation as described in step 5 below.

1. Log into Digital StoreFront as an administrator.
2. Go to Administration > MIS CONFIGURATION > MIS Systems.
3. Click Add New MIS.

4. Complete the Connectivity tab on the MIS Systems page:
   a. In the MIS Type field, select EFI PrintSmith Vision and enter a descriptive Name (up to 50 characters) for the MIS.
   b. In the Communication Channel field, select the eFlow channel you created in Task 4 above.
   c. In the Routing identifier field, enter any kind of unique identifier. For tracking reasons, EFI recommends that the Routing Identifier is the same as the Communication Channel.
   d. Ignore the Transaction Node Name field; it will automatically get filled in with MIS after you click Save.
5. If Digital StoreFront is EFI-hosted and PrintSmith is customer-hosted:
   a. On the computer where you installed your local eFlow (as described on page 14), go to the C:\eFlow folder.
   b. Open the instance.properties file with a text editor like Notepad.
   c. Look for instance id and copy the ID.
   d. On the Connectivity tab on the MIS Systems page in Digital StoreFront, click Associate eFlow Client (to the right of the Client eFlow Instance ID field).
   e. Paste the ID you copied from the properties file and click Assign. The ID is now displayed in the Client eFlow Instance ID field.

6. Click the Settings tab.

7. Set the Order Settings as follows:
   - Asynchronous Order Submission = Selected
     This ensures buyers receive an order confirmation immediately (with no delay during checkout), but are not informed of any communication or data errors. (The site administrator is always notified of communication errors.)
   - Accepts Single Order = Selected
     This ensures Digital StoreFront sends a single XML file to PrintSmith for the entire order (instead of separate XML files for each line item in a multiple-item order).
   - Include Print Preview Thumbnail = Cleared
     This does not apply to PrintSmith Vision.
   - Show Inventory Buyer by Default = Cleared
     This does not apply to PrintSmith Vision.
   - Allow Multiple Delivery Address = Cleared
     This currently does not apply to PrintSmith Vision.
8. Set the **Invoice Settings** as follows:
   - **Transmits Invoice PDF** = Selected
   - **Update Order With Final Invoice** = Selected
     
     These two settings ensure that when PrintSmith Vision sends a final invoice, the status of the order in Digital StoreFront changes to **Completed and Invoiced**.
   - **Credit Cards = Charge on MIS Request**
     
     This ensures that credit cards are charged by Digital StoreFront when a request to do so is received from PrintSmith Vision. The amount charged is the final invoice amount provided by PrintSmith Vision. After it receives the request from PrintSmith Vision, Digital StoreFront attempts the delayed capture on the credit card and sends a message to PrintSmith Vision to indicate whether the capture was successful or not.

   ![Invoice Settings](image)

   The Invoice Settings must be set like this

9. Set the **Other Settings** as follows:
   - **Display MIS Shipping Amounts to Buyer** = Cleared
     
     This does not apply to PrintSmith Vision (only to those MIS that send shipping and tracking information to Digital StoreFront).
   - **Allow MIS Company/user creation from self registration** = Cleared
     
     This setting does not apply to PrintSmith Vision.
   - **Number of Decimals through Job Cancelled Statuses** = Leave as they are

   ![Other Settings](image)

10. Click **Save**.

    **Note** After you click **Save**, a set of MIS topics is created in eFlow to allow the exchange of information between Digital StoreFront and the PrintSmith Vision MIS you just created.
Note  The BOD Message Versions section is informational and applies only to integrations like PrintSmith Vision that use an eFlow communications channel.

Task 6: Associate MIS with Print Shop and Define Print Shop Settings

After you configure PrintSmith Vision on the MIS Systems page, you must associate it with a print shop in Digital StoreFront. A print shop is the facility that handles the orders placed on the site, for example, a print center or copy shop.

In addition to associating the MIS with a print shop, if you plan to offer digital downloads of products or direct mail products on your site, you must configure some default shipping methods for the print shop. When buyers order a digital download or direct mail product, no shipping information is required in the cart. When the order is sent to the PrintSmith Vision, however, a delivery method is required (even if it does not apply to the type of product being ordered). To support this, you must map three default shipping methods to delivery methods that are available for this purpose in Digital StoreFront.

1. In Digital StoreFront go to Administration > Print Shops.
2. Double-click the print shop you want to associate with the MIS (or add a new print shop).
3. Scroll down to the **MIS System** section and select the MIS to associate with the print shop. (This is the PrintSmith Vision MIS that you just configured on the MIS Systems page in Task 5 above.)

![MIS System section](image)

4. If you plan to offer digital downloads or direct mail products on the site:

   a. Select the delivery methods to be used for digital download or direct mail orders by clicking **Assign/Update Delivery Methods** and then selecting **Digital Delivery**, **USPS First Class**, and **USPS Standard Mail**.

   ![Delivery Methods](image)

   b. For **Default Shipping Method for Digital Download**, select **Digital Delivery**.

   c. For **Default Shipping Method for Direct Mail (Standard)**, select **USPS Standard Mail**.

   d. For **Default Shipping Method for Direct Mail (First Class)**, select **USPS First Class**.

   ![Default Shipping Methods](image)

   **Note** These three default shipping methods will never be available as selections in the cart; they are used “behind the scenes” to support the MIS order workflow for digital downloads and direct mail.

5. Click **Save**.
Task 7: Set Integration Preferences to Establish a Connection

The next step is to establish the connection between PrintSmith Vision and Digital StoreFront. To do so, you must copy some information from Digital StoreFront to the corresponding fields in the Integration preferences in PrintSmith Vision.

**Important** If EFI is hosting Digital StoreFront and you are hosting PrintSmith Vision, you must indicate that your local eFlow is connected to the Super e-Flow used by Digital StoreFront and create eFlow topics (required for communication). See step 7 on page 22.

**To set integration preferences to establish a connection**

1. In Digital StoreFront, go to **Administration > MIS CONFIGURATION > MIS Systems**. On the MIS Systems page you will see the PrintSmith Vision MIS that you configured in Task 5. Keep this page open so you can copy the Communication Channel name and Routing Identifier to PrintSmith Vision.

<table>
<thead>
<tr>
<th>MIS Systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td>PSV204</td>
</tr>
</tbody>
</table>

2. In PrintSmith Vision, click **Preferences** in the QuickAccess panel (or select **Admin > Preferences**) and under **System**, select **Integration**.

3. Scroll down and select the **Enable DSF Integration** check box.

4. Select **eFlow Based DSF Integration**.

5. Complete the **eFlow URL** field as follows:
   - If both Digital StoreFront and PrintSmith Vision are EFI-hosted, enter the same URL you entered when establishing the communication channel in Task 4.
   - If both Digital StoreFront and PrintSmith Vision are customer-hosted, enter the URL of your local eFlow (the same one you entered when establishing the communication channel in Task 4).
   - If Digital StoreFront is EFI-hosted and PrintSmith Vision is customer-hosted, enter the URL of your local eFlow. (This is not the same URL you entered when establishing the communication channel in Task 4.)

**Tip** To find the URL of your local eFlow, see step 1c under “Define the eFlow channel in Digital StoreFront” on page 14.

6. Complete these fields as follows:
   a. Copy the name of the Communication Channel from the MIS Systems page in Digital StoreFront and paste it in the **MIS Communication channel** field.
   b. Copy the part of the MIS Communication channel name _after the _ (underscore) and paste it in the **DSF Site GUID** field.
   c. Copy the Routing Identifier from the MIS Systems page in Digital StoreFront and paste it in the **DSF Routing Identifier** field.
d. (Optional) If you want to use single sign on (SSO) from PrintSmith Vision to Digital StoreFront, in the **DSF URL** field, the enter the URL of your Digital StoreFront server. For information about configuring single sign on, see page 23.

```
<table>
<thead>
<tr>
<th>Enable DSF Integration</th>
<th>Reset</th>
<th>Test Connection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Service Based DSF Integration</td>
<td></td>
<td></td>
</tr>
<tr>
<td>eFlow Based DSF Integration</td>
<td>Connected to Super eFlow</td>
<td>Create eFlow Topics</td>
</tr>
</tbody>
</table>
```

The GUID is the part of the MIS Communication channel name after _

7. If EFI is hosting Digital StoreFront, but you are hosting PrintSmith Vision:
   a. Select the **Connected to Super eFlow** check box.
   b. Click **Create eFlow Topics**.

   **Note** You must create the eFlow topics before you test the connection in the next step, or the connection will fail.

8. After you complete the **eFlow URL** through **DSF Routing Identifier** fields, click **Test Connection**.
   You should get a message that the connection to eFlow was successful. If not, make sure you entered all the information in the Integration preferences correctly.

9. Click **Save**.

   **Note** After PrintSmith Vision is integrated with Digital StoreFront, do not use the **Reset** button unless advised to do so by EFI Support.
Task 8: Set Up Single Sign On from PrintSmith to Digital StoreFront

You can allow users who are logged into PrintSmith Vision to get to Digital StoreFront directly from the QuickAccess panel and not have to log into Digital StoreFront. A user just needs to sign in once to PrintSmith Vision. This is known as Single Sign On (SSO). Setting up SSO is optional, but it can save your users time.

**Important**  
SSO in Digital StoreFront means something different, and typically involves the use of Active Directory or a similar solution. The SSO feature in PrintSmith Vision is simply a way to click a button in PrintSmith Vision to get to Digital StoreFront and be automatically logged in.

The automated signon works in one direction only – from PrintSmith to Digital StoreFront. You cannot log into Digital StoreFront and be logged into PrintSmith automatically.

Before you can set up SSO to Digital StoreFront, PrintSmith Vision must already be integrated with Digital StoreFront. (Task 7 must be completed – see page 21).

**Note**  
Users in Digital StoreFront must be part of the CSR group to take advantage of SSO from PrintSmith Vision.

SSO is enabled through a token that is generated in PrintSmith Vision and then entered in Digital StoreFront.

**To set up SSO from PrintSmith to Digital StoreFront**

1. In PrintSmith Vision, make sure the **DSF URL** field in the Integration preferences includes the URL of your Digital StoreFront installation.
2. In PrintSmith Vision:
   a. Select **Admin > User Definitions**.
   b. In the list of users, select the user for whom you want to allow SSO.
   c. To the right of the **DSF SSO Token** field, click **Generate Token**.  
      A unique set of characters is generated in the **DSF SSO Token** field. (You cannot edit this field.)
   d. Click **Save** to save the user definition and then select the user again so the **DSF SSO Token** field is displayed. Leave the User Definitions window open.
3. In Digital StoreFront:
   a. Log into Digital StoreFront as an administrator.
   b. Go to Administration > Users.
   c. Select the user who corresponds to the PrintSmith user you just edited and click Edit Profile. (The user must be part of the CSR group.)
   d. Scroll down to the SSOToken field and copy the token from the DSF SSO Token field in PrintSmith to the SSOToken field in Digital StoreFront. What you enter here must match exactly what was generated in PrintSmith.
   e. Click Save Profile.

4. Repeat steps 2 and 3 for each user you want to allow to use SSO.

When the tokens match on both sides, the user can now click Digital StoreFront in the PrintSmith Vision QuickAccess panel, and be taken directly to Digital StoreFront where the user is automatically logged in without having to enter his or her Digital StoreFront user name and password.
Task 9: Register Accounts and Contacts in Digital StoreFront

A customer account in PrintSmith Vision is equivalent to a company in Digital StoreFront.

Contacts in PrintSmith Vision are equivalent to users in Digital StoreFront. The users, also known as buyers, place orders on the Digital StoreFront site.

Information about accounts and contacts is always controlled from PrintSmith Vision – the information is sent from PrintSmith Vision to Digital StoreFront. This process is also known as registering accounts and contacts. Information about companies (accounts) and users (contacts) is never sent from Digital StoreFront to PrintSmith Vision. If you update a company or user in Digital StoreFront, the corresponding account or contact is not updated in PrintSmith Vision. Likewise, if you delete a company or user in Digital StoreFront, the corresponding account or contact remains in PrintSmith with no indication it is no longer present in Digital StoreFront.

**Note** If you make changes to an account or contact in PrintSmith Vision after the account or contact is registered, the changes are sent to Digital StoreFront automatically.

Typically, if an account has many contacts, you will want only some of them to be users (buyers) in Digital StoreFront. Each such contact must have an e-mail address and a DSF user name defined in PrintSmith Vision.

Before you can register an account with Digital StoreFront, the account must have at least one contact with an e-mail address and DSF user name defined.

You can register accounts and contacts in different ways, but in all cases you must first make sure that contacts have e-mail addresses and DSF user names.

**Method 1: Register a contact and automatically register the account**

Start by going through your accounts and identifying those contacts you want to register as buyers for the account. When you register a contact, the contact’s account is also automatically registered (if not already registered).

1. For each account you want to register in Digital StoreFront as a company, do the following:
   a. Click Accounts in the QuickAccess panel (or select AR > Accounts).
   b. In the Account Picker window, select an account.
   c. On the Address tab, in the Contact List field, select a contact you want to be a buyer in Digital StoreFront and click Edit.

The Contact window opens.

**Tips** You can also open a contact by clicking Contacts in the QuickAccess panel and selecting a contact in the Contact Picker window (contacts are always identified by their accounts).

If you are creating a new contact, you must save the contact before you can register the contact. The contact must also be associated with an account.
2. In the Contact window, click the **Web** tab.

3. **Under DSF Info:**
   a. In the **DSF User Name** field, enter a unique name. The contact will use this name to log into the Digital StoreFront site.
   b. Click **Register Contact**.
   c. If the name is not unique, you will be asked if you want to use the e-mail address as the user name. Click **Yes** or **No**. If you click **No**, enter a different name and click **Register Contact** again.

4. After you click **Register Contact**, a message informs you that registration was initiated, and that the contact will be e-mailed login information after registration is complete. Click **OK** to continue.

After registration is complete:
- The contact is registered as a user in Digital StoreFront.
- The contact receives an e-mail with a link to the Digital StoreFront site and a user name and password. After first logging in, the user will be forced to change the password.

---

**Important** Never add, edit, or delete a user in Digital StoreFront because that information is not sent to PrintSmith Vision. Users (meaning contacts) must always be managed from PrintSmith Vision.
• The account with which the contact is associated is also registered in Digital StoreFront (unless it was already registered).

![Company List](image)

**Important** Never add, edit, or delete a company in Digital StoreFront because that information is not sent to PrintSmith Vision. Companies (meaning accounts) must always be managed from PrintSmith Vision.

• On the Web tab in the Contacts window:

  • The Register Contact button on the Web changes to Update Contact so you can update contact information in Digital StoreFront if it changes.
  
  • The Last Registration Date and Registration Status are updated.
  
  • The Unregister Contact button becomes available. You can use this if you no longer want the contact to be a user in Digital StoreFront.

![DSF Info](image)

5. Repeat steps 1 through 4 for all the contacts you want to be users in Digital StoreFront.

**Method 2: Register individual accounts and their contacts**

You can also register an account from the Customer window, as long as the default invoice contact for the account has an e-mail address and DSF user name defined. If the account has other contacts that you want to register as users in Digital StoreFront, they must also have an e-mail address and DSF user name defined.

1. Click Accounts in the QuickAccess panel (or select AR > Accounts).
2. In the Account Picker window, double-click the account you want to register.
3. Click the Web tab.
4. Under **DSF Info**, click **Register Account**.

5. If the account has multiple contacts, you are asked whether you want to register all of them or selected contacts.
   a. Click **Yes** to register all the contacts or **No** to select the contacts.

   If you clicked **Yes**, registration is initiated.

   **Warning**

   All contacts for this account will be sent to Digital StoreFront. Click **Yes** to continue or **No** to select specific contacts to send to Digital StoreFront.
b. If you clicked No, in the Customer’s Contacts List window, select the check boxes of the contacts you want to register as users in Digital StoreFront and then click Select Contact(s).

**Note** If a contact is missing a DSF User Name or E-mail, it is displayed in red. You cannot register the contact without providing the missing information in the Contact window.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>DSF User Name</th>
<th>E-mail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norman</td>
<td>Boswell</td>
<td>Norman Boswell</td>
<td>nbowell@cardsforev...</td>
</tr>
<tr>
<td>Aaron</td>
<td>Goldstein</td>
<td>Aaron Goldstein</td>
<td>agoldstein@cardsfore...</td>
</tr>
<tr>
<td>Oliver</td>
<td>Halloway</td>
<td>Oliver Halloway</td>
<td>ohalloway@cardsfore...</td>
</tr>
</tbody>
</table>

6. When you receive a message informs you that registration was initiated, and that the contacts will be e-mailed login information after registration is complete, click OK to continue.

![Registration Successful Message]

After registration is complete, the information under **DSF Info** is updated, and the contacts receive an e-mail with login information.

**DSF Info**

- **Update Account**
- **Last Registration Date:** 6/29/2016 11:56:24 AM
- **Registration Status:** Successful
- **Unregister Account**

As with the first method of registering accounts and contacts, both a company and user(s) are created in Digital StoreFront.

**Method 3: Register multiple accounts in one step**

If the default invoice contacts for accounts you want to register in Digital StoreFront already have an e-mail address and DSF user name defined, you can register all the accounts and all their default invoice contacts in one step.

**Important** When you register several accounts in one step, only the default invoice contacts for the accounts are registered as users in Digital StoreFront. If an account has multiple contacts that you want to register, either register the account as described for Method 2 above or register the contacts individually from the **Web** tab in the Contact window as described for Method 1 starting on page 25.

1. Click **Accounts** in the QuickAccess panel (or select **AR > Accounts**).
2. In the Account Picker window, select the check boxes of the accounts you want to register.
If the default invoice contact for an account is missing a DSF user name, you are notified, and will not be able to select the account until the contact has a **DSF User Name** (on the **Web** tab in the Contact window).

**Note** If an account is already registered it has a green check mark in the **DSF** column.

3. Click **Register Account**.

4. After you click **Register Account**, a message informs you that registration was initiated, and that the contacts will be e-mailed login information after registration is complete. Click **OK** to continue.

After registration is complete, the accounts will have green check marks in the **DSF** column in the Account Picker window.
If you have a long list of accounts, you can select the Accounts sent to DSF check box in the Account Picker window to see all the accounts that are registered with Digital StoreFront.

<table>
<thead>
<tr>
<th>Account Picker</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customers</td>
</tr>
<tr>
<td>7th Dimension Technology</td>
</tr>
<tr>
<td>ADVANCED MOBILE DIESEL SERVICES</td>
</tr>
<tr>
<td>Anna's Designs</td>
</tr>
<tr>
<td>E&amp;S Tutorial Service</td>
</tr>
<tr>
<td>J&amp;S Super Designs</td>
</tr>
</tbody>
</table>

In Digital StoreFront, you will see these companies listed on the Companies page.

In addition, if a transaction for an account or contact fails to transmit, you must reset the item and then update the account or contact manually. For information about resetting items, see “If an item fails to transmit” on page 32.

1. Open the account or contact in PrintSmith Vision and click the Web tab in the Customer or Contact window.

Important Never add, edit, or delete a company in Digital StoreFront because that information is not sent to PrintSmith Vision. Companies (meaning accounts) must always be managed from PrintSmith Vision.

Important Never edit a company or user in Digital StoreFront because that information is not sent to PrintSmith Vision. Companies (meaning accounts) and users (contacts) must always be managed from PrintSmith Vision.
2. Under DSF Info, click Update Account or Update Contact depending on what you are updating.

### DSF Info
- **Last Registration Date:** 6/30/2016 10:35:38 AM
- **Registration Status:** Successful
- **Unregister Account**

#### Unregistering accounts and contacts

If you want to delete a particular company or user in Digital StoreFront, you must unregister the account or contact in PrintSmith Vision. The account or contact will still exist in PrintSmith Vision, but the corresponding company or user will be deleted in Digital StoreFront.

When you unregister an account, no contacts (users) associated with the account can place orders in Digital StoreFront. When you unregister a contact, that person can no longer place orders in Digital StoreFront.

**Important**

Never delete a company or user in Digital StoreFront because that information is not sent to PrintSmith Vision. Companies (meaning accounts) and users (contacts) must always be removed from Digital StoreFront by being unregistered in PrintSmith Vision.

1. In PrintSmith Vision, open the account or contact you want to unregister (delete from Digital StoreFront).
2. Click the **Web** tab in the Customer or Contact window.
2. Under DSF Info, click **Unregister Account** or **Unregister Contact** depending on what you are deleting.

### DSF Info
- **Last Registration Date:** 6/30/2016 10:35:38 AM
- **Registration Status:** Successful
- **Unregister Account**

The company or user is then removed from Digital StoreFront.

#### If an item fails to transmit

In some windows (for example, the Account Picker window), a ![icon] indicates that an item is being transmitted to Digital StoreFront so it can be registered there. After the item is successfully registered, the icon changes to a green check mark. Occasionally, an item fails to transmit (perhaps due to a network issue) so no green check mark is displayed.

You can check the Integration preferences to see what has failed to transmit and reset those items. You can then send the items to Digital StoreFront again.

**Note**

Until you reset an item that failed to transmit, you cannot try to register, update, or unregister it.
To reset items

1. In PrintSmith Vision, open the Integration preferences.
2. Scroll below the DSF URL field.
3. Click View Unsuccessful Transactions. Any items that failed to transmit are listed.
   
   **Note**  No transactions are listed until you click DSF Unsuccessful Transaction.

<table>
<thead>
<tr>
<th>DSF Routing Identifier</th>
<th>DSF URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>ROI</td>
<td><a href="http://dsfprintsmith/DSF">http://dsfprintsmith/DSF</a></td>
</tr>
</tbody>
</table>

   ![Table with columns: Transaction Date/Time, Type, Record, Name, Description]
<table>
<thead>
<tr>
<th>Transaction Date/Time</th>
<th>Type</th>
<th>Record</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/30/2016 10:35:34 AM</td>
<td>Contact</td>
<td>34</td>
<td>Jamie</td>
<td>Message is in transit</td>
</tr>
</tbody>
</table>

4. Make a note of the items you want to resend, select them in the list, and click Reset Selected Items.

   You can now try registering, updating, or unregistering the items again, depending on what you were trying to do when the transaction failed.

   **Note**  If an account or contact failed to transmit, after you reset the transaction, update the account or contact as described on page 31.
Task 10: Register Stocks in Digital StoreFront

You can fully control the stocks that are available to buyers when they are placing orders in Digital StoreFront. You should always define stocks in PrintSmith Vision and send information about them to Digital StoreFront. As with accounts and contacts, this process is known as registering stocks. In Digital StoreFront, stocks are known as media.

**Note** Digital StoreFront comes with some pre-defined media. Typically you should delete the media before registering the stocks from PrintSmith Vision so the only media in Digital StoreFront are mapped to stocks in PrintSmith Vision.

The registered stocks must then be priced in Digital StoreFront – which always controls the pricing. (You should still price stocks in PrintSmith for non-Digital StoreFront orders, but this pricing is ignored for Digital StoreFront orders.)

With the exception of pricing, information about stocks is always controlled from PrintSmith Vision – the information is sent from PrintSmith Vision to Digital StoreFront. Information about stocks (known as media in Digital StoreFront) is never sent from Digital StoreFront to PrintSmith Vision. For example, if you create media in Digital StoreFront, no corresponding stock is created in PrintSmith Vision. Likewise if you update media in Digital StoreFront, the corresponding stock definition is not updated in PrintSmith Vision. As a result, avoid creating or updating media in Digital StoreFront.

When stocks are registered, PrintSmith Vision sends the name, size, and color of the stock to Digital StoreFront.

When a Digital StoreFront order comes into PrintSmith Vision and includes a registered stock, the stock is “recognized.” For example, costing information is available. In addition, with the exception of stock for special pages, if the stock is inventoried, inventory is adjusted. (For more information about special pages, see page 49.)

You can register (send) stocks in two ways:

- Register multiple stocks at the same time.
- Register stocks individually.

**Important** For stock to be registered in Digital StoreFront, the stock definition must include a Thickness (on the Specification and Pricing tab) and a Normal Run Size (on the Pricing tab) in the Stock Definitions window.

**Method 1: Register multiple stocks at a time**

You can register multiple stocks at a time from the Stock Picker window.

1. In PrintSmith Vision, click Stock Definitions in the QuickAccess panel (or select Pricing > Stock Definitions).
2. Select the check boxes of the stocks you want to register.
3. If you select a stock without a Thickness defined (on the Specification and Pricing tab), you get a message informing you. Edit the stock to include a thickness. (You cannot register the stock without this.)
4. Click **Register Stock with DSF**.

5. A message informs you that registration has started. Click **OK**.

After the stocks are registered, a green check mark is displayed in the **DSF** column in the Stock Picker window.

6. In Digital StoreFront, the stocks are now listed in the Media Catalog. Price the media in Digital StoreFront and add it to ticket templates. See page 36.

**Note** Very occasionally a stock may not be registered (perhaps due to a network issue). For information about resetting the item so you can re-send it, see “If an item fails to transmit” on page 32.

**Method 2: Register one stock at a time**

You can also register stocks as media in Digital StoreFront one at a time from the Stock Definitions window.

1. In PrintSmith Vision, click **Stock Definitions** in the QuickAccess panel (or select **Pricing > Stock Definitions**).

2. In the Stock Picker window, find and select the stock you want to register in Digital StoreFront, and click **Select Stock** (or double-click the stock).

3. In the Stock Definitions window, click the **Web** tab.
4. Under DSF Info, click Register Stock.

5. A message informs you that registration has started. Click OK.

After the stock is registered, the Last Registration Date is updated and the Register Stock button changes to Update Stock.

In addition, a green check mark is displayed next to the stock in the DSF column in the Stock Picker window.

6. In Digital StoreFront, the stock is now listed in the media catalog. Price the media in Digital StoreFront and add it to ticket templates. See below.

**Note**  Very occasionally a stock may not be registered (perhaps due to a network issue). For information about resetting the item so you can re-send it, see “If an item fails to transmit” on page 32.

**Price media and add to ticket templates**

After you register stocks as media in Digital StoreFront, they are listed in the Digital StoreFront media catalog. (PrintSmith Vision sends the name of the stock, its size, and its color to Digital StoreFront.)

**Note** If you did not delete the pre-supplied media in Digital StoreFront, you can recognize your registered stocks in the Digital StoreFront media catalog by their ID – they will all have an ID numbered in the hundred thousands, for example, 100009 or 100014.

You must now price the media in Digital StoreFront and add media to ticket templates.
The price you set for the media is what buyers pay, and this price overrides the price of the associated stock defined in PrintSmith Vision.

In Digital StoreFront, the recommended way to price media is by editing a price sheet (although you can price media individually). Go to Administration > Pricing, open a price sheet, select Media in the View By field, and then edit a group of related media to add prices. For information about price sheets in Digital StoreFront, see the online Help in Digital StoreFront when on the Administration tab.

**Tip**  Click to open Help in Digital StoreFront.

After your media is priced, you can add selected media to your ticket templates. When a ticket template is associated with a product in Digital StoreFront, buyers ordering that product will be able to choose the media specified in the ticket template. For information about creating ticket templates and products, see the online Help in Digital StoreFront when on the Administration tab.

### Updating stocks

If you change some information about a stock in PrintSmith Vision, you can update the corresponding media in Digital StoreFront.

**Important**  With the exception of pricing, never edit mapped media in Digital StoreFront because that information is not sent to PrintSmith Vision. Stocks must always be managed from PrintSmith Vision.

1. After you make changes to a stock in PrintSmith Vision, click the Web tab in the Stock Definitions window.
2. Under **DSF Info**, click **Update Stock**.

```
**DSF Info**

[Update Stock] [Unregister Stock]

Last Registration Date  7/11/2016 10:44:09 AM
```

### Unregistering stocks

If you want to delete a particular media in Digital StoreFront, you must unregister the stock definition in PrintSmith Vision. The stock definition will still exist in PrintSmith Vision, but the corresponding media will be deleted in Digital StoreFront.

When you unregister stock, it is no longer available as a selection to buyers placing orders in Digital StoreFront.

**Important**  Never delete a mapped media in Digital StoreFront (one that you registered from PrintSmith Vision) because that information is not sent to PrintSmith Vision. Media (meaning stocks) must always be unregistered in PrintSmith Vision so they are deleted in Digital StoreFront.

You can unregister stocks either from the Stock Picker window or the Stock Definitions window.

**To unregister stocks from the Stock Picker window**

1. In PrintSmith Vision, click **Stock Definitions** in the QuickAccess panel.
2. In the Stock Picker window, select the check boxes of registered stocks (ones with green check marks in the **DSF** column) that you want to unregister.
3. Click **Unregister Stock from DSF** (in the top right of the Stock Picker window).
To unregister a stock from the Stock Definitions window

1. In PrintSmith Vision, click Stock Definitions in the QuickAccess panel.
2. From the Stock Picker window, open the registered stock definition you want to unregister. (These stock definitions have a green check mark in the DSF column.)
3. In the Stock Definitions window, click the Web tab.
4. Under DSF Info, click Unregister Stock.

<table>
<thead>
<tr>
<th>DSF Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update Stock</td>
</tr>
<tr>
<td>Unregister Stock</td>
</tr>
<tr>
<td>Last Registration Date 7/11/2016 10:44:09 AM</td>
</tr>
</tbody>
</table>
Task 11: Register Shipping Methods in Digital StoreFront

Any shipping method that you want to be available to buyers in Digital StoreFront must be registered in Digital StoreFront, where it is known as a *delivery method*. You register and unregister shipping methods using Table Editor.

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.

When a registered shipping method is selected for a Digital StoreFront order, the method is automatically displayed in the *Ship Via* field in the Account Info window in PrintSmith Vision, as well as in the *Ship Via* field on the *Deliver How* tab in the Delivery Ticket window, so you can easily see what the buyer selected.

Register shipping methods

1. In PrintSmith Vision, select *Admin > Table Editor*.
2. In the *Tables* field, select *Ship Via*.
   
   **Tip** You can also open the Ship Via table from the *Admin* tab in the Web Administration window (*Admin > Web Administration > Admin*). Click *Send Shipping Method to DSF*, and Table Editor opens with the Ship Via table selected.

3. Select the shipping method(s) you want to register in Digital StoreFront.
4. Under *DSF Info*, click *Register Shipping Method*.

After shipping methods are registered, a green check mark is displayed in the *DSF* column.

Price shipping methods and associate with your print shop

After you register shipping methods as delivery methods in Digital StoreFront, they are listed on the Digital StoreFront Delivery Methods page. You must then price the delivery methods and add them to your print shop and optionally your companies.

**Tip** You can set up estimated pricing for shipping in Digital StoreFront so buyers are informed during checkout that the shipping amount is an estimate. You can then finalize the shipping amount in PrintSmith Vision.
In Digital StoreFront, the recommended way to price shipping is by editing a price sheet (although you can price delivery methods individually). Go to **Administration > Pricing**, open a price sheet, select **Shipping** in the **View By** field, and then edit the delivery methods to add prices. For information about price sheets in Digital StoreFront, see the online Help in Digital StoreFront when on the **Administration** tab.

**Tip** Click ![Help icon](image) to open Help in Digital StoreFront.

After your delivery methods are priced, you can associate them with your print shop. By default, all your companies (accounts) inherit the delivery methods associated with the print shop, but you have the option of associating only certain delivery methods with certain companies. For information about associating delivery methods with print shops and companies, see the online Help in Digital StoreFront when on the **Administration** tab.

### Unregistering shipping methods

If you no longer want a mapped shipping method to be available in Digital StoreFront, you can unregister it.

1. In PrintSmith Vision, select **Admin > Table Editor**.
2. In the **Tables** field, select **Ship Via**. All the mapped (registered) shipping methods have green check marks in the **DSF** column.
3. Select the shipping method(s) you want to unregister in Digital StoreFront.
4. Under **DSF Info**, click **Unregister Shipping Method**.
Task 12: Map Products

In Digital StoreFront, you create and price all the products that you offer on the Web site. Products can include static (fixed-content) products, ad hoc products, VDPs, DSFdesign Studio products, SmartCanvas products, and non-printed products.

After you create the products, you send them to PrintSmith Vision so they can be mapped.

In PrintSmith Vision, you map Digital StoreFront products to Web product templates. These templates are used to define the job when an order for the product comes in from the site. Each template can be mapped to several products in Digital StoreFront. For example, on the Web site you may offer several types of business cards, but they are all produced in a similar way. You can therefore map all the business card products to a single business card template in PrintSmith Vision.

Important If a Digital StoreFront product is not mapped to a PrintSmith template, orders for the product will come through as outside service jobs (buyouts) in PrintSmith Vision. Even for non-printed products you may want to create templates – that way you will have more accurate sales information in PrintSmith Vision.

Create products in Digital StoreFront

Always start by defining products in Digital StoreFront. The products must exist before you can map them to Web product templates in PrintSmith Vision.

1. Log into Digital StoreFront as an administrator.
2. Go to Administration > Site Configuration > Products. The Manage Products page opens.
3. Click Create Product to add a new product, including pricing information. (If you do not price the product, orders for the product will require manual quotes.)
   Tip For information on creating different types of products, see the online Help in Digital StoreFront when on the Administration tab. (Click to open Help.)
4. Save the product and publish it on the storefront.
5. Repeat this for all your products.
Send the products to PrintSmith Vision

After you create products in Digital StoreFront, you must send them to PrintSmith Vision so they can be mapped.

**Note**  
This is a one-time step. After you synchronize the products during setup, any products you create in Digital StoreFront after that are automatically sent to PrintSmith Vision.

1. Log into Digital StoreFront as an administrator.
2. Click **MIS Systems** and open your PrintSmith Vision MIS.
3. Click the **Settings** tab, scroll to the bottom of the page, and click **Synchronize Products**.

Map products in PrintSmith Vision

The products in PrintSmith Vision that you want to map to products in Digital StoreFront are defined in the Web Administration window in PrintSmith. Each product must have a job template associated with it. Start by creating your Web products and then map them to Digital StoreFront products.

**Tip**  
A job template can always be edited (and often *must* be edited) when an order comes into PrintSmith Vision so the template does not have to be exact. For example, an order for an ad hoc product is always “new” to PrintSmith Vision so a template for an ad hoc product is typically generic. If you process many ad hoc jobs of different types, you may want to create Web products and templates for each type, for example, “Ad Hoc Digital” or “Ad Hoc Booklet.”

Create Web products and templates

1. In PrintSmith Vision, select **Admin > Web Administration**. The Web Administration window opens.
2. Click the **Products** tab.

**Note**  
If you use PrintSmith Site®, some additional tabs are displayed in the Web Administration window.

3. Click **New**. An **<untitled product>** field is displayed under **Products** in the left pane.

**Important**  
If you are also using PrintSmith Site, many fields are available that do not apply to Digital StoreFront. Only complete the fields described below.
4. Enter a name for the product and press Tab.

5. Associate a job template with the product. When an order for the product comes in from Digital StoreFront, 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.*

     **Tip** If you are creating a template for an ad hoc product (which will be different each time an order is placed for it), make the template generic. For example, select a typical stock, select the pricing and costing press or copier that you are most likely to use, and add the charges that typically apply. You will still need to make changes to the job when the order comes in, but you will at least have some job specifications in place.

   - 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.

     In the list of products, to the left of the product name indicates the product has a template associated with it.

6. If you also use PrintSmith Site, ignore all the remaining fields on the Products tab.

7. Click **Save** on the toolbar.

8. **Either** map the product template to Digital StoreFront products (see below) or repeat steps 3 through 7 to continue creating Web product templates for mapping to your Digital StoreFront products.

   **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**).

### Map a Web product template to Digital StoreFront products

After you create a Web product and associate it with a template, you can map it to one or more Digital StoreFront products.

**Notes** These products must already exist in Digital StoreFront.

While a product template can be mapped to many Digital StoreFront products, a Digital StoreFront product can only be mapped to one product template.

1. On the **Products** tab in the Web Administration window, select the Web product you want to map from the list on the left.
2. Under **DSF Info**, click **Map to DSF Product**.

3. In the window that opens, select the check boxes of the Digital StoreFront products you want to map to the selected Web product template and then click **OK**.

   **Tip** If you have many products in Digital StoreFront, use the **Filter** field to find the ones you want.

<table>
<thead>
<tr>
<th>Selected</th>
<th>DSF Product Name</th>
<th>DSF Product Display Name</th>
<th>Description</th>
<th>DSF Product ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>Physics 2 Course Note</td>
<td>Physics 2 Course Note</td>
<td></td>
<td>1041</td>
</tr>
<tr>
<td>✓</td>
<td>English 101 Study Notes</td>
<td>English 101 Study Notes</td>
<td></td>
<td>1042</td>
</tr>
<tr>
<td>✓</td>
<td>Courseware</td>
<td>Chemistry 101 Courseware</td>
<td></td>
<td>1039</td>
</tr>
<tr>
<td>✓</td>
<td>English 102 Study Notes</td>
<td>English 102 Study Notes</td>
<td></td>
<td>1043</td>
</tr>
<tr>
<td>✓</td>
<td>English 201 Study Notes</td>
<td>English 201 Study Notes</td>
<td></td>
<td>1044</td>
</tr>
<tr>
<td>✓</td>
<td>English 202 Study Notes</td>
<td>English 202 Study Notes</td>
<td></td>
<td>1045</td>
</tr>
<tr>
<td>✓</td>
<td>Physics 3 Courseware</td>
<td>Physics 3 Courseware</td>
<td></td>
<td>1046</td>
</tr>
<tr>
<td>✓</td>
<td>Physics 4 Courseware</td>
<td>Physics 4 Courseware</td>
<td></td>
<td>1047</td>
</tr>
<tr>
<td></td>
<td>Promotional Note</td>
<td>Promotional Note</td>
<td></td>
<td>1049</td>
</tr>
</tbody>
</table>

The products mapped to the currently selected Web product are then listed under **DSF Info**.

When an order for one of these products comes into PrintSmith Vision, the mapped Web product template will automatically open in the Job window for the order. Typically this will require some changes because of what the buyer ordered on the site.

**Tip** To map additional Digital StoreFront products to a Web product template (or to un-map products), click **Map to DSF Product** and select or clear the check boxes of products.

**Task 13: Map Print Services to PrintSmith Vision Finishing Charges**

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 order coming into PrintSmith will automatically have this print service/finishing charge included as a line item in the invoice.

**Important** 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.

In addition, if you are using a Fiery, mapped print services in a job are passed along to the Fiery. For example, if the job includes a folding or binding print service, the Fiery receives the instructions it needs to produce the job in terms of the kind of folding or binding that was requested.

By default, all the standard print services that are available in Digital StoreFront are available for mapping in PrintSmith Vision.

**Tips**
You do not need to map all the print services to charges, just the ones that you commonly use in your Digital StoreFront ticket templates.

You may not have charge definitions that correspond to the print services you want to map. In this case you can create new charges and then map them.

### Map print services to charges

1. In PrintSmith Vision, select **Pricing > Print Services**. The Print Services window opens.

2. By default, all print service categories are listed. To list just one category (for example, binding), select it in the **Print Service Category** field.

3. In the list of print services, select the one you want to map to a charge and click **Select Charge**.

4. In the Charge Selector window, expand the category that corresponds to the print service you selected.

5. Select the charge you want to map to the print service, and click **OK**.

**Note** If you do not have a matching charge defined, you may need to define it and then come back here to map it.
The **Pricing** field at the bottom of the Print Services window now displays the name of the charge you selected.

6. For some fold charges, a **Fold Style** may be available. Select it if necessary.
7. Click **Save** on the toolbar. The **Priced** column now includes a check mark.

8. Repeat steps 3 to 7 for all the print services you want to map to charges.

**Updating charges**

After you map a charge to a print service, you can update the charge if necessary.

1. In the Print Services window, select a print service that is mapped to a PrintSmith charge (the **Priced** column has a check mark).

2. Click **Edit Charge**.

3. In the Update Charge window, make any necessary changes and click **Change**.
If you create custom print services in Digital StoreFront

If you create custom print services in Digital StoreFront and want them available in PrintSmith Vision, you must send them to PrintSmith from Digital StoreFront and then map them to PrintSmith Vision charges.

**Important** When you are integrated with Digital StoreFront, you should not create custom print services in PrintSmith Vision (by clicking New or Duplicate in the Print Services window). If you create the custom print services in PrintSmith Vision, they will not exist in Digital StoreFront. Always synchronize print services from Digital StoreFront as described below. (The New and Duplicate buttons in the Print Services window apply when you are integrated with the Fiery, but are not integrated with Digital StoreFront.)

1. Go to Administration > MIS Systems.
2. Select your MIS (the one you defined in “Task 5: Configure a PrintSmith Vision MIS in Digital StoreFront”).
3. Click the Settings tab and then click Synchronize Print Services at the bottom of the tab.

1. In PrintSmith Vision, map the print service to a charge as described in “Map print services to charges” on page 45.

**Tip** If you are also integrated with a Fiery, you can map the custom print service to a Fiery capability. (In PrintSmith Vision, select Admin > Fiery Integration, select your Fiery device, click Edit, and in the wizard map the custom print service to a Fiery capability.) When this mapped custom print service is then part of a job that is submitted to the Fiery, the Fiery will receive the appropriate instructions.

Deleting print services

You can only delete custom print service (ones that were sent from Digital StoreFront using Synchronize Print Services).

1. In the Print Services window, select a print service that is identified as custom (the Custom column has a check mark).
2. Click Delete on the toolbar and click Yes to confirm the deletion.
About special pages

When you create ticket templates in Digital StoreFront, you can enable special pages for some print options, typically for media or print in color/sides. For example, if special pages are enabled for media, buyers can select different media for different pages in a job. When buyers specify special pages for a job, that information is sent to PrintSmith Vision where it can be seen in the Job window. For more information, see “Special pages” on page 67.

Important

When setting up a ticket template that enables special pages for media, all the media selections in the ticket template should be mapped to PrintSmith stock definitions (ones you registered). If a media in the ticket template was defined in Digital StoreFront (versus being registered from PrintSmith Vision), and the buyer selects it for special pages, the media will not be reflected in the Job window in PrintSmith. Instead, the media will default to the stock selected in the Web product template in PrintSmith, which is not what you want.

If the media a buyer selects for special pages is an inventoried stock in PrintSmith Vision, the inventory will not currently be adjusted.

Task 14: (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 Digital StoreFront, 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 Digital StoreFront; ignore the other fields.

2. In the Taken by field, enter any identifying information you want to use for orders coming in from Digital StoreFront, for example, System or Web.

3. Close the Web Administration window and save the information when prompted.

Task 15: (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 Digital StoreFront. 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 Digital StoreFront, it is assigned this hold state.

3. Ignore the Reject State field; it is not used for Digital StoreFront integrations.

4. Close the Web Administration window and save the information when prompted.
Next Steps

After you complete the setup tasks, EFI recommends that you place some test orders to make sure things are working as expected. You can register a test account and contact (which you can later unregister) to log into Digital StoreFront and place an order. You can then see the order come into PrintSmith Vision. After you run your test you can void or cancel the test orders so they do not affect your sales figures.

For information about the order workflow, see page 57.
Upgrading

In this chapter

Overview 52
Task 1: Meet System Requirements 53
Task 2: Establish an eFlow-Based Communication Channel 53
Task 3: Edit Your PrintSmith Vision MIS 53
Task 4: Set Integration Preferences to Establish a Connection 53
Task 5: Synchronize Contacts 54
Task 6: Synchronize Products and Review Product Mapping 55
Task 7: Register Stocks in Digital StoreFront 55
Task 8: Register Shipping Methods in Digital StoreFront 56
Task 9: Map Print Services to Finishing Charges 56
Task 10: Set Up Single Sign On from PrintSmith to Digital StoreFront 56
Next Steps 56
Overview

If you were already using Digital StoreFront with an earlier version of PrintSmith Vision, you can upgrade to the new eFlow-based integration by completing the tasks described below.

**Note** If you are currently integrated with Digital StoreFront, *your integration will continue to work as is* after you upgrade to PrintSmith Vision 3.4.1. Once you upgrade to Digital StoreFront 9.2, you have the option of upgrading to the eFlow-based integration as described in this chapter.

If you are new to PrintSmith Vision and Digital StoreFront, follow the instructions in “Setup for New Integrations” starting on page 9.

**Important** While you are performing the initial upgrade tasks, orders will be held and not come through to PrintSmith. Review the tasks you must perform so you can schedule the upgrade at a time least likely to affect your business. Tasks 2 through 6 must be completed so orders can be placed and come through to PrintSmith Vision. Tasks 7 through 10 can be done later.

Many tasks are the same as those new users must complete so in some cases the instructions below will point you to earlier sections of this guide.

The main tasks you must complete in an upgrade are:

1. Make sure you meet system requirements. In particular, you must be using Digital StoreFront 9.2.
2. In Digital StoreFront, define an eFlow-based communication channel. (When PrintSmith Vision is customer-hosted, eFlow must be installed locally.)
3. In Digital StoreFront, edit your PrintSmith Vision MIS.
   **Important** Once you establish the connection, you should complete tasks 5 and 6 as soon as possible.
5. Synchronize existing contacts.
6. Synchronize existing products and map products.
7. Register stocks in PrintSmith Vision as media in Digital StoreFront.
8. Register shipping methods in PrintSmith Vision as delivery methods in Digital StoreFront.
9. Map print services to finishing charges.
10. (Optional) Set up single sign on (SSO) from PrintSmith Vision to Digital StoreFront.

Details of these tasks follow.
Task 1: Meet System Requirements

To take advantage of the new integration, you must be using:

- PrintSmith Vision 3.4.1 or higher
- Digital StoreFront 9.2 or higher
- If PrintSmith Vision is customer-hosted (you are hosting), eFlow is required. See “eFlow installation requirements” on page 13.

Note: If you are currently integrated with Digital StoreFront, your integration will continue to work as is after you upgrade to PrintSmith Vision 3.4.1. Once you upgrade to Digital StoreFront 9.2, you have the option of upgrading to the eFlow-based integration as described in this chapter.

Task 2: Establish an eFlow-Based Communication Channel

1. If Digital StoreFront is customer-hosted, complete Task 3: If Digital StoreFront Is Customer-Hosted Edit the Registry” on page 11. You must do this before trying to establish a communication channel.
2. Follow the instructions (based on your configuration) in “Task 4: Establish eFlow-Based Communication Channel” starting on page 13.

Task 3: Edit Your PrintSmith Vision MIS

If you were already using Digital StoreFront with an earlier version of PrintSmith Vision, you need to edit your PrintSmith Vision MIS so it uses an eFlow channel (and is no longer a basic integration).

1. In Digital StoreFront, go to Administration > MIS Systems.
2. Select your current PrintSmith Vision MIS.
3. Clear the Basic Integration check box.
4. In the Communication Channel field, select the eFlow communication channel you just created and click Save.
5. If Digital StoreFront is EFI-hosted and PrintSmith is customer-hosted, be sure to complete step 5 on page 17.
6. Click the Settings tab and complete it as described starting in step 7 on page 17. Be sure you set all the options as instructed.
7. Click Save.

Note: A print shop should already be associated with the MIS you edited so you should not need to change it.

Task 4: Set Integration Preferences to Establish a Connection

If you were already using Digital StoreFront with an earlier version of PrintSmith Vision, your Integration preferences in PrintSmith are set to use Web Service Based DSF Integration. You must change this to eFlow Based DSF Integration and then provide some different information in the fields that are displayed.

1. In PrintSmith Vision, click Preferences in the QuickAccess Panel and then select System > Integration.
2. Select eFlow Based DSF Integration.
3. Follow the instructions for setting the Integration preferences as described in “Task 7: Set Integration Preferences to Establish a Connection” on page 21.

Important: Complete the next two tasks (5 and 6) right away so you can have a working integration.
**Task 5: Synchronize Contacts**

If you are currently integrated with Digital StoreFront, you have contacts in PrintSmith linked to users in Digital StoreFront via contact IDs (which had to be entered in both systems). When you upgrade to the new integration, you must synchronize the existing contacts so they are now linked using the new communication method.

1. In Digital StoreFront, go to **Administration > MIS Systems**.
2. Select your PrintSmith Vision MIS.
3. Click the **Settings** tab.
4. Click **Synchronize Contacts** near the bottom of the tab.

In the new integration between PrintSmith Vision and Digital StoreFront, you no longer map contacts to users with a contact ID. Instead, you **register** accounts and contacts from PrintSmith Vision, and they become companies and users in Digital StoreFront.

Both accounts and contacts are now always managed from PrintSmith Vision.

- For any **new** accounts or contacts that you want to register, follow the instructions in “Task 9: Register Accounts and Contacts in Digital StoreFront” starting on page 25.
Task 6: Synchronize Products and Review Product Mapping

If you are currently integrated with Digital StoreFront, you have Web products in PrintSmith linked to products in Digital StoreFront via SKUs (which had to be entered in both systems). When you upgrade to the new integration, you must synchronize the existing products so they are now linked using the new communication method. In addition, you should review and change the mapping if necessary.

1. In Digital StoreFront, go to Administration > MIS Systems.
2. Select your current PrintSmith Vision MIS.
3. Click the Settings tab.
4. Click Synchronize Products near the bottom of the tab.

In the new integration, product mapping is handled differently. You no longer have to enter SKUs in both systems to create a one-to-one mapping. Instead you map your Web product templates 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 template in PrintSmith Vision.

- Review your current mapping to see if your existing Web product templates can be mapped to more than one Digital StoreFront product. For information about mapping products, see page 43.

Note
Task 6 is the final task to get the integration into a working condition. You can complete the remaining tasks on your own schedule.

Task 7: Register Stocks in Digital StoreFront

In the new integration between PrintSmith Vision and Digital StoreFront, you can fully control the stocks that are available to buyers when they are placing orders in Digital StoreFront. You should always define stocks in PrintSmith Vision and send information about them to Digital StoreFront. As with accounts and contacts, this process is known as registering stocks.

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.

You may be using many media in your Digital StoreFront ticket templates. EFI recommends that you evaluate the media you require and then start registering stocks from PrintSmith Vision. You will then need to price the registered stocks in Digital StoreFront and then add them to ticket templates (while removing unregistered media from the ticket templates and then deleting unregistered media). You do not have to register all your stocks at once; you can do this gradually.

Tip
Registered stocks in the Digital StoreFront media catalog all have an ID numbered in the hundred thousands, for example, 100009 or 100014. This allows you to recognize registered stocks when looking at the media catalog.

- For information about registering stocks, pricing them in Digital StoreFront, and adding them to Digital StoreFront ticket templates, see page 34.
Task 8: Register Shipping Methods in Digital StoreFront

In the new integration between PrintSmith Vision and Digital StoreFront, you can register the PrintSmith shipping methods that you want to be available to buyers in Digital StoreFront (where they are known as delivery methods.)

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.

**Tip** You can set up estimated pricing for shipping in Digital StoreFront so buyers are informed during checkout that the shipping amount is an estimate. You can then finalize the shipping amount 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 the Account Info window in PrintSmith Vision, as well as in the Ship Via field on the Deliver How tab in the Delivery Ticket window, so you can easily see what they buyer selected.

Since you already have delivery methods defined in Digital StoreFront, you can transition to registered shipping methods at any time that is convenient for you. Once you have registered, priced, and assigned the shipping methods you want buyers to use, you can delete (in Digital StoreFront) your old delivery methods (or just unassign them from the print shop and companies).

- For information about registering shipping methods and associating them with print shops, see page 39.

Task 9: Map Print Services to Finishing Charges

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 in PrintSmith 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 (as in previous integrations).

**Important** 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.

- For information about mapping print services to finishing charges, see page 44.

Task 10: Set Up Single Sign On from PrintSmith toDigital StoreFront

You can allow users who are logged into PrintSmith Vision to get to Digital StoreFront directly from the QuickAccess panel and not have to log into Digital StoreFront. A user just needs to sign in once to PrintSmith Vision. This is known as Single Sign On (SSO). Setting up SSO is optional, but it can save your users time.

To set up single sign on to Digital StoreFront, follow the instructions on page 23.

Next Steps

As soon as you complete tasks 1 through 6, order will start coming into PrintSmith Vision. While the workflow is very similar to what it was before, there are a few differences. Review the procedures in the “Order Workflow” chapter that begins on page 57 to make sure you understand the changes.
Order Workflow

In this chapter

Overview 58
Pending Documents Window 59
Invoice Window 60
Account Info Window 61
Web Worksheet and Job Windows 68
Delivery Ticket Window 68
Orders for Unmapped Products 68
Completing the Process in PrintSmith Vision 69
What Gets Updated in Digital StoreFront? 69
Credit Card Workflow 71
Troubleshooting 72
Overview

As orders are placed on the site, they come into PrintSmith Vision where you can process them.

1. Open the Pending Documents window. Orders from Digital StoreFront are identified with a globe icon. For information about the Pending Documents window, see page 59.

2. Open the invoice for a Web order that came into PrintSmith Vision. For more information about the Invoice window, see page 60.

3. Review the account information by clicking Account Info on the toolbar of the Invoice window. The Special Instructions and Customer Comment fields provide information about the order that was placed. For more information about the Account Info window, see page 61.

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 about the Web Worksheet window, see page 63; for information about the Job window, see page 66.

5. Produce the job as usual and generate a delivery ticket. For information about delivery tickets, see page 68.

6. Pick up and post the invoice.

Note As certain events take place in PrintSmith Vision, the status of the order is updated in Digital StoreFront or the credit card gets charged for credit card orders. For information, see “What Gets Updated in Digital StoreFront?” on page 69.
Pending Documents Window

Each order that is placed on the site has an invoice created for it in PrintSmith Vision and is listed as a Web order in the Pending Documents window. (To open this window, click Pending Documents in the QuickAccess panel.)

To list just Web orders in the Pending documents window, select Web Orders in the Document Type field.

A globe icon identifies your Digital StoreFront orders. The name of the product and the name of the job in the order are automatically used for the Document Title. If the product and job names are the same, you will see the same name twice.

Tip

If you want the Pending Documents window to include the order number that was assigned on the Digital StoreFront site, set your pending list preferences (Admin > Preferences > POS > Pending List) to include the Web Reference column. The order number is followed by (DSF) to identify it as a Digital StoreFront order.

You can open the invoice as usual (by selecting it and clicking Open).
**Invoice Window**

Open the invoice for a Digital StoreFront order as usual. For example, you can open it from the Pending Documents window or use **Invoice > Review Any Document**.

When using **Invoice > Review Any Document**, you can either enter the invoice number or enter the Digital StoreFront order number to locate the invoice:

1. Select **Invoice > Review Any Document**.
2. Select **External ID (DSF is selected automatically)**.
3. Enter the Digital StoreFront order number and click **OK**.

![Invoice window interface](image)

Note the following in the Invoice window:

- The title bar of the window includes the Digital StoreFront (DSF) order number. The order number is also displayed as the **Web reference number** in the lower left corner of the window.

- The customer account is based on the company of the buyer who placed the order.
  
  **Note**  
  If the buyer who placed the order was not associated with a registered account (company), the order comes in as a walk-in order.

- Pricing is locked because the price on the site always overrides the price in PrintSmith Vision. (The buyer has already paid this price.)

- If more than one product was part of the order, each product is listed on the invoice.

- The line item for a print job will include the selected stock.
  
  **Note**  
  For B&W or color jobs, the information about single or double-sided printing comes from the Web product template, not the order. Always check the Web worksheet (see page 63) to find out what the buyer intended.

- If the buyer selected a print service that is mapped to a PrintSmith charge, it is displayed as a line item in orange.

If a print service was selected for the job, but is not mapped to a charge, it is not a line item in the invoice, but is listed on the Web worksheet. For information about the Web worksheet, see page 63.
• The **Special Instructions** field includes the delivery instructions or special instructions the buyer specified for the order in Digital StoreFront (as well as any account notes specified in PrintSmith).

<table>
<thead>
<tr>
<th>Special Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deliver to back door</td>
</tr>
</tbody>
</table>

• The shipping calculated in Digital StoreFront (based on the delivery method the buyer selected) is reflected on the **Shipping** line in the invoice totals. If a handling fee was applied by the print shop, it is included in the shipping amount in PrintSmith Vision. (The handling fee is not a separate line item, but you can see it broken out in the **Customer Comment** field in the Account Info window.)

**Note** If you adjust the shipping amount in PrintSmith Vision (because it was different) and a handling fee was applied, the shipping amount that is sent back to Digital StoreFront is the changed shipping amount (as modified in PrintSmith) minus the handling fee. The handling fee that is sent back to Digital StoreFront is the original handling fee.

<table>
<thead>
<tr>
<th>Cust Discount</th>
<th>$0.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Sub</td>
<td>$76.00</td>
</tr>
<tr>
<td>Sales Tax</td>
<td>$76.00</td>
</tr>
<tr>
<td><strong>Shipping</strong></td>
<td><strong>$24.80</strong></td>
</tr>
<tr>
<td>Total</td>
<td><strong>$108.40</strong></td>
</tr>
<tr>
<td>Amt. Due</td>
<td><strong>$108.40</strong></td>
</tr>
</tbody>
</table>

• If a rush fee was added in Digital Storefront, the rush fee is included in the invoice total. (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.)

**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 about the Account Info window:

- All the account and contact information is based on the buyer who placed the order.
  
  **Note** If the buyer was not a contact registered from PrintSmith, the order will be for the walk-in account.

- The **Ordered on** and **Wanted by** fields are automatically filled in with dates from the order.

<table>
<thead>
<tr>
<th>Ordered on</th>
<th>7/12/2016</th>
<th>1:42 PM</th>
<th>Tue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wanted by</td>
<td>7/14/2016</td>
<td>time</td>
<td>Thu</td>
</tr>
</tbody>
</table>

- The **Special Instructions** field shows any delivery or special instructions the buyer entered. (The information here is the same as in the **Special Instructions** field on the invoice.)

  **Special Instructions**
  
  Please come to back entrance

- If the buyer selected a registered shipping method for the order, it is automatically displayed in the **Ship Via** field.

  **Ship Via** Local Delivery

- The **Customer Comment** field includes the handling fee (if any), the shipping type (delivery method) and name of recipient in parentheses, the shipping amount, and payment information.

  **Notes** Be sure to scroll through the field to see all the information.

  For information about credit card payments, see page 71.

  **Customer Comment**
  
  Handling Fee - 3.0  
  Shipping Type - Deliver (Juan Gonzales)  
  Shipping Amount - 21.0  
  Payment Info:  
  Payment Method: Other Account

- If the payment was made by accounting code, the accounting code is displayed in the **Customer Comment** field and also in the **Expense Code** field.

  **Expense Code** AX1

  **Tip** If you want the **Taken by** field to provide some 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 set to **System**, all orders that come from Digital StoreFront are taken by **System**.

  **Taken by** System
Web Worksheet and Job Windows

When a job is the result of a Web order, a Web worksheet is created for the job. This worksheet contains production information from the Web site about the order, for example, the media the buyer selected, 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.

**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 window

The Web Worksheet window opens automatically when you open a job from the Invoice window.

The Web Worksheet window may include the following:

- Production specifications as selected by the buyer on the site, for example, media and binding. This information in the Web Worksheet window is particularly important for ad hoc products for which you typically have very generic job templates because an order for an ad hoc product is always different.
- 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.

**Tip** Content files are also listed in the Digital Assets window where you can preview the files. See page 65.

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 in either Digital StoreFront or PrintSmith Vision in the future. (This price adjustment does not include shipping, tax, handling, and so on.)
More than one entry for the same option (for example, Media Weight or Media Entry) can indicate that special pages are part of the job (these are pages that are treated differently, for example, printed on different media). You can obtain more information about special pages from the Job window. See “Special pages” on page 67.

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.

To copy items from the Web worksheet to the job ticket

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. Click OK.
The selected items are removed from the Web worksheet and copied to the Job Ticket Notes window where you can click **OK** to add them to the job ticket.

### Digital assets

Content files (also known as digital assets in PrintSmith) that are uploaded as part of a job are listed in the Digital Assets window where you can preview the files.

1. While in the Job window, click **Digital Assets** under **Commands** in the left pane. (Digital Assets is displayed in green when content files are part of a job.)

2. Select the file you want to preview and click **Show Preview**.
Job window

Much of the information in the Job window comes from the Web product template mapped to the product that was ordered on the site. In particular:

- The name in the window title bar is the name of the Web product template that is mapped to the product that was ordered.
- For B&W or color jobs, the way Single-Sided or Double-Sided is set always comes from the product template, not from the order. Always check the Web worksheet to find out if the buyer requested something different.

The following, however, come from the order:

- Description
- Ordered quantity
- Stock

**Note** If the media selected for the job was mapped to a stock in PrintSmith (by being registered), it is displayed in the Job window; if it was not a mapped stock, the stock that is displayed comes from the product template. For this reason, make sure buyers that the media selections available to buyers are registered stocks.

- Mapped print services (in orange under Charges)

You can change the information in the Job window as necessary. For example, you may need to select a different copier or press, or change a digital job from Single Sided to Double Sided depending on what is specified in the Web worksheet. Keep in mind, however, that your changes just affect the production of the job, not its price (which is set in Digital StoreFront).
Special pages

If an order includes special pages, they are listed under **Special Pages** in the Job window. These are pages that are printed differently from the rest of the job. For example, **From 1 to 2, Duplex, B&W** means that pages 1 and 2 should be printed in black and white, double-sided.

1. Double-click an entry under **Special Pages** to obtain more information about it.

![Special Pages window]

2. Review the information in the Special Page window. What is displayed here depends on what kind of special pages were enabled in the ticket template used for the product in Digital StoreFront. Typically special pages apply to media, color and sides, or orientation.

   - **From** and **To** identifies the numbers of the special pages.
   - The **Stock** field shows the media selected for the special pages.

   **Important** If the buyer’s media selection for special pages was not mapped to a stock in PrintSmith (by being registered), the **Stock** field will not reflect the buyer’s selection. Instead, the **Stock** field will default to the stock selected in the Web product template for the job. Check the Web worksheet for what the buyer selected and click **Change** next to the **Stock** field to select the stock and if necessary select a **Color**. To avoid this situation, make sure all your ticket templates in Digital StoreFront include registered media (stocks).

   If the registered media the buyer selected for special pages is an inventoried stock in PrintSmith Vision, the inventory is not currently adjusted.

   With the possible exception of stock, the information about the special pages should not require changes because the Special Page window shows what the buyer requested.

3. If more than one set of special pages was listed under **Special Pages** in the Job window, use **Next** and **Previous** to go through the different special pages.

4. Click **Save** if you made any changes.
Note Special pages can be created for any digital job you create in PrintSmith Vision, but your selections will not be reflected in the pricing. For example, if you select a more expensive paper for some pages, the price of the job will not account for this (it will still use the price of the stock selected for the job).

Delivery Ticket Window

When you generate a delivery ticket for an order that originated in Digital StoreFront, the Deliver Where tab in the Delivery Ticket window automatically includes information about the recipient from the order.

If the buyer selected a registered shipping method for the order, the method is automatically displayed in the Ship Via field on the Deliver How tab in the Delivery Ticket window so you know what was selected. (Otherwise, check the Customer Comment field in the Account Info window for the shipping method that was selected by the buyer.)

Note When all the jobs are marked as Delivered on the Status tab of the Delivery Ticket window, the status of the order in Digital StoreFront changes to Shipped. For more information about status updates in Digital StoreFront, see “What Gets Updated in Digital StoreFront?” on page 69.

Orders for Unmapped Products

If you have products that you offer on the Digital StoreFront site that are not mapped to Web product templates, orders for these products come 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 includes an outside service job for the product that was ordered.

Note Depending how your pricing methods are set up (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), the ID of the product in Digital StoreFront, and a price adjustment. Since in this case there is no product pricing available in PrintSmith Vision, the “adjustment” is the actual price the buyer paid for the product on the site. For example, for a non-printed product (like an order for pens), only a price adjustment is included, but for print unmapped products, production specifications will be included in the Web Worksheet window.
Tip The total price of the order (including shipping, taxes, and so on) is available in the Invoice window. The price adjustment shown in the Web Worksheet window is just for the product.

Completing the Process in PrintSmith Vision

While working on the job in PrintSmith Vision, some status information is sent to Digital StoreFront as described below. When the job is completed in PrintSmith Vision, you should pick up and post the invoice as usual. This also completes the order in Digital StoreFront with no further information about the order being sent to Digital StoreFront.

What Gets Updated in Digital StoreFront?

As orders are processed in PrintSmith Vision, status information is sent to Digital StoreFront. In addition, for credit card orders, PrintSmith Vision lets Digital StoreFront know when to charge the credit card and what the final charge amount should be.

Certain events in PrintSmith Vision result in the status of orders being updated in Digital StoreFront as follows.

When you select a production location

If you select a production location for an order using any of the available methods in PrintSmith Vision, the status of an order in Digital StoreFront (in the Order View and in the buyer's order history) changes to **In production**.

Tip You can select a production location by using a bar code scanner, clicking Location in the Pending Documents window, or selecting a location in the Job or Delivery Ticket windows. In addition, if you use Tracker, the location is updated when you start or stop a job.

Notes Digital StoreFront does not distinguish among different production locations in PrintSmith Vision. For example, if you first select Design as the location, the status of the order in Digital StoreFront changes to **In production**. If you later select Bindery as the location, the order status in Digital StoreFront remains **In production**.

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). For example, if this is set to **Changing status of FIRST job**, when you first select a location in PrintSmith for any job in the order, the status changes to **In production**. If this is set to **Changing status of LAST job**, all jobs in the order must have a location selected in PrintSmith before the status changes to **In production**.
When you indicate an invoice is ready for pickup

When an invoice in PrintSmith Vision is marked ready for pickup, you are indicating production is complete, but the invoice has not been picked up and posted yet.

![Invoice Status](image)

The status of the order in Digital StoreFront changes to **Shipped**.

![Order Status](image)

**Note** If you use both Scheduler and Tracker, in PrintSmith Vision you can configure a cost center to **Mark INV ready for pickup** when a task in that cost center is stopped in Tracker. In this case, users are asked if they want to mark the invoice as ready for pickup. If they click **Yes**, the status of the order in Digital StoreFront changes to **Shipped**.

When you indicate jobs were delivered

When all the jobs in an order are marked as **Delivered** on the **Status** tab of the Delivery Ticket window, the status of the order in Digital StoreFront changes to **Shipped**.

If you cancel an invoice

If you cancel an invoice in PrintSmith Vision (**Invoice > Cancel Document**) **before** marking it ready for pickup, the status of the order in Digital StoreFront changes to **Canceled**. (Once the order has a **Shipped** status in Digital StoreFront, you cannot cancel it.)
When you pick up and post an invoice

After you pick up and post an invoice in PrintSmith Vision, the final amount for the order (which may include adjustments to shipping or tax) is sent to Digital StoreFront, and the status of the order in Digital Storefront changes to Completed and Invoiced. Buyers can see this in their order history. They can also click Invoice File to open and print the invoice.

At this point no further status updates are sent to Digital StoreFront.

Credit Card Workflow

When buyers pay for an order with a credit card, the workflow is as follows:

1. Digital StoreFront contacts a payment gateway (configured in Digital StoreFront) to authorize the credit card payment, but the credit card is not charged at this point.

2. When the invoice is marked ready for pick up in PrintSmith Vision, the status of the order in Digital StoreFront changes to Shipped, but the card is not charged yet.

3. When you pick up and post the invoice, a message alerts you that payment was preauthorized in an external system (DSF for Digital StoreFront).

4. Click OK.

   The credit card is now charged the final invoice amount (as calculated in PrintSmith Vision) and the status of the order changes to Completed and Invoiced in Digital StoreFront.

Notes

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

Credit cards in Digital StoreFront must be configured (on the Credit Card Management and Configuration page) to add a percentage – often 25% – to the amount in the shopping cart when a credit card is authorized. This is standard industry practice to cover additional costs such as taxes. The authorized amount is not the amount that is ultimately charged to the credit card. The buffer is necessary, however, because the card is charged the amount calculated by PrintSmith, which is likely to be higher than the original order amount due to taxes and actual shipping costs.

If you need to cancel an order after posting the invoice, you must reverse the credit card payment manually (either in Digital StoreFront or on the payment gateway).

If the account for the order included an invoice-level charge, that is not included in the amount that is sent back to Digital StoreFront.
Troubleshooting

Orders that are received from Digital StoreFront 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**.

<table>
<thead>
<tr>
<th>Date and Time</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>7/11/2016 11:15 A</td>
<td>received order # D5F1946 created Invoice # 10</td>
</tr>
<tr>
<td>7/11/2016 11:25 A</td>
<td>received order # D5F1947 created Invoice # 17</td>
</tr>
<tr>
<td>7/11/2016 1:38 PM</td>
<td>received order # D5F1940 created Invoice # 19</td>
</tr>
<tr>
<td>7/12/2016 10:13 A</td>
<td>received order # D5F1950 created Invoice # 21</td>
</tr>
<tr>
<td>7/12/2016 1:42 PM</td>
<td>received order # D5F1959 created Invoice # 20</td>
</tr>
<tr>
<td>7/12/2016 7:31 PM</td>
<td>received order # D5F1960 created Invoice # 21</td>
</tr>
<tr>
<td>7/12/2016 7:55 PM</td>
<td>DSF: Missing template 2</td>
</tr>
<tr>
<td>7/12/2016 7:55 PM</td>
<td>received order # D5F1961 created Invoice # 22</td>
</tr>
</tbody>
</table>
Index

Account Info window 61
Account Picker window 29
accounting codes 62
accounts
  about 25
  registering 27, 29
  unregistering 32
  updating 31
Canceled status 70
charges
  mapping to print services 44
  updating 47
communication channel 13, 21
companies 25, 31, 40
Completed and Invoiced status 71
connecting PrintSmith to Digital StoreFront 21
contacts
  about 25
  DSF user names 26
  registering 25
  synchronizing 54
  unregistering 32
  updating 31
content files 63, 65
costing 6
credit card orders 71
custom print services 48
delivery methods 39
delivery tickets 68
digital assets 63, 65
Digital StoreFront
  about 6
  configuring MIS 16
  delivery methods 39
  licensing 10
  media 34
  MIS Invoice Settings 18
  MIS Order Settings 17
  MIS Other Settings 18
  print shops 19
  products 41
  SSO from PrintSmith 23
status updates 69
DSF user names 26
eFlow
  communication channel 13
  installing 14
  system requirements 13
  topics 15, 18, 22
URL 14, 21
failed transmissions 32
Fiery 45, 48, 56
handling fees 61
hold states 49
In production status 69
Integration preferences 21, 53
integration workflow 6, 58
Invoice window 60
invoices
  canceling 70
  picking up and posting 69, 71
  ready for pickup 70
job
  templates 42
  ticket notes 64
  Job window 66
licensing 10
mapping
  for unmapped products 68
  media 34, 36, 55, 63
  MIS Invoice Settings 18
  MIS Order Settings 17
  MIS Other Settings 18
  MIS Systems page 16, 53
  orders 45
  print services to charges 45
  products 41, 43, 55
  media 34, 36, 55, 63
  payment information 62
  workflow 58
Pending Documents window 59
payment information 62
price 6, 36, 40, 60, 63, 68
print services
  about 44
  custom 48
  deleting 48
  in invoices 60
  synchronizing custom 48
print shops
  about 6
  configuring MIS in Digital StoreFront 16, 53
Integration preferences 21, 53
Web products 42
production locations 69
production specifications 63
products
  Digital StoreFront 41
  mapping 41, 43, 55
  PrintSmith Vision 42
  synchronizing 42
  templates 42