

## User Guide

DSF / PrintStream Integration  
Setup and Overview - Add On  
V21.1.0200

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EFI PrintStream | V21.1.0200 *DSF / PrintStream Integration Setup and Overview Add On User Guide*

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## Table of Contents

<b>Introduction .....</b>	<b>5</b>
Overview .....	5
Contact Information .....	6
<b>Integration Setup.....</b>	<b>7</b>
1 - Define DSF Integration Parameters .....	7
2 – Create Communication Channel in DSF .....	9
Self-Hosted Digital StoreFront .....	11
3 – Create MIS System in DSF .....	12
4 – Turn on DSF in PrintStream .....	18
5 – Reset next Order ID in DSF .....	19
6 – Turn on DSF for Customer .....	20
7 – Share Inventory with DSF .....	21
8 – Synchronize PrintStream with DSF .....	22
9 – Set up Asset Types .....	23
10 – Reason Codes .....	25
11 – Project Setting - Requires Customer Order Number .....	27
Transaction Log .....	28
Update Transactions .....	28
Order Submit .....	28
<b>General Setup Information .....</b>	<b>29</b>
DSF Setup (Inventory) .....	29
DSF Setup (Print Shop) .....	30
Available Quantity .....	31
Catalog Update Trigger Points .....	32
Inventory Images .....	33
How to Integrate a PrintStream POD Item .....	35
Loading DSF Print Services in PrintStream .....	37
Import Media Options .....	40
Import Impressions .....	42
BOD PrintStream Settings in System Parameters   EFI Integration – New Customer .....	43
BOD PrintStream Settings in Company Level Parameters .....	44
BOD Pace Connect Settings .....	44
BOD PrintStream Settings in System Parameters   EFI Integration – Existing Customer .....	46
BOD PrintStream Settings in Company Level Parameters .....	47
BOD Pace Connect Settings .....	48
Print Services Setup and Use .....	50
BOD Order XML .....	57
How to Integrate a PrintStream Kit Item .....	58
Fulfillment - Dynamic Kits - Enhancement .....	58
DSF PrintStream Integration Points .....	60
Item Description Mapping .....	60
Inventory Description .....	60



Web Description .....	62
Alternate Description .....	63
Web Long Description .....	64
Order Settings - Setting Up Min/Max and Multiples of .....	65
Quantity .....	69
Start and End Date for Product .....	71
Shipping Charges .....	72
Pricing .....	73
Sort Key .....	77
<b>Shipping Updates .....</b>	<b>80</b>
<b>Cancel or Edit Orders from DSF .....</b>	<b>82</b>
Duplicate Customer Recipient Utility .....	84
<b>Inventory: Net Masterfile.Inventory - Inventory - Edit Inventory Code when DSF in Use is Flagged .....</b>	<b>86</b>
<b>Integration: DSF- Improve Catalog Updates to DSF .....</b>	<b>87</b>
<b>Fulfillment: .Net Sales Order - Edit Ship To Recipient Address Line Item .....</b>	<b>91</b>
<b>Integration: DSF - Order Failures (DSF to PrintStream) - Invalid Order By Address when a new order by with a bad address is used .....</b>	<b>94</b>
<b>Integration: DSF - Add PS message to DSF Order Information Response .....</b>	<b>94</b>
Inventory: Net Masterfile.Inventory - Inventory - Edit Inventory Code when DSF in Use is Flagged .....	96
<b>Inventory - Need WARNING for: Printstream it is not generating an XML .....</b>	<b>97</b>
<b>DSF Orders – adding lines to orders after order is in PrintStream .....</b>	<b>98</b>

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# Introduction

## Overview

This document includes instructions on how to set up the DSF to PrintStream Integration. Certain steps, such as installing Web2PS reference their own installation documents and are not included here.

This is a summary listing of the necessary procedures to set up the integration (in order).

- Install DSF (DSF Installation Guide).
- Install Web2PS (Web2PS Installation Guide).
- Install DSF2PS (DSF2PS Installation Guide).
- Define DSF Integration parameters (Section 1).
- Create Communication Channel in DSF (Section 2).
- Create MIS System in DSF (Section 3).
- Turn on DSF in PrintStream (Section 4).
- Ensure all Recipients have a first name prior to completing installation steps.
- Reset next Order Id in DSF (Section 5).
- Turn on DSF for Customer (Section 6).
- Share inventory with DSF (Section 7).
- Synchronize PrintStream with DSF (Section 8).

**Note** You must have the Routing Identifiers created for each Company/Plant in Master Files Reports. If you are integrated with Monarch, you must have the Parent Company created as well.

You should have at least one customer set up in the Fulfillment system, including a project which will be used to process DSF orders.

For the Web2PS and DSF2PS web services, the URLs must be provided by the installer. These are need in Step 1 – Define DSF Integration Parameters.

Once the links for DSF to PrintStream are created you must never, never refresh the database from another database. This will remove all the links between DSF and PrintStream and you will then have to re-do all the setup.

# Contact Information

## EFI Support

US Phone:	855.334.4457 (first select option 3, then press option 8, then press option 1)
US Fax:	415.233.4157
US E-mail:	<a href="mailto:printstream-support@efi.com">printstream-support@efi.com</a>
Regular Service Desk hours are 8:00 AM to 7:00 PM Central Time, Monday – Friday. Outside of these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue.	
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:	<a href="mailto:ProfessionalServicesOperations@efi.com">ProfessionalServicesOperations@efi.com</a>

# Integration Setup

## 1 - Define DSF Integration Parameters

1. Go To Streamline Fulfillment Main> Definitions > System Parameters > DSF Integration

DSF Integration			
Parameter Name	User can over-ride...	Value	
Send Elevated Recipients	<input type="checkbox"/>	1	
Default DSF Unit Of Weight	<input type="checkbox"/>	Ounces	
Allow Recipient Update	<input type="checkbox"/>	0	
DSF WebService URL	<input type="checkbox"/>	http://10.35.21.216/DSF/WebServices/OrderInfoXML.aspx	
DSF Site Key	<input type="checkbox"/>	Y9CMR4/OYf3+Cj6Uc9WtgtVFX0A=	
DSF Maximum Catalog Items	<input type="checkbox"/>	400	
DSF Catalog Sync Max Threads	<input type="checkbox"/>	1	
DSF License ID	<input type="checkbox"/>	DSF_PrintStream_Pace	
DSF Call Back URL	<input type="checkbox"/>	http://10.35.21.216/DSF/AsyncCommHandler.ashx?SITEGUID=f...	
DSF Call Back ID	<input type="checkbox"/>	e1a0cd24-03fe-4a36-8439-d08801a1dcec	
DSF Configuration URL	<input type="checkbox"/>	http://10.35.44.115/DSF2PS/EFIConfiguration.aspx	
DSF Integration URL	<input type="checkbox"/>	http://10.35.44.115/DSF2PS/EFIIntegration.aspx	
DSF Logfile Path	<input type="checkbox"/>	\\DSF2PS\\LogFiles	
DSF Routing ID	<input type="checkbox"/>	Impressive Impressions	
DSF Device ID	<input type="checkbox"/>	e1a0cd24-03fe-4a36-8439-d08801a1dcec	

2. The following settings must be populated.

- **Send Elevated Recipients**- only used with Customer / Sub Customer situations. If that is used, then put a 1 here. If not, then leave this blank.
- **Default DSF Unit of Weight**- PrintStream can only support one unit of weight measure for all items. DSF supports multiple types, Ounces, Pounds, Kilos, Grams. Because of the limitation in PrintStream the measure is set here and is for all items pushed up to DSF.
- **Allow Recipient Update** – Set to 1 if you want PrintStream to push recipients, along with their passwords, to DSF. (Note - This will override existing DSF passwords!) Set to zero to maintain users/recipients in DSF.
- **DSF WebService URL** - this URL is created by taking part of the DSF Call Back URL. In the screen above I would copy this portion of the URL <http://10.35.21.216/DSF> and add this after DSF "WebServices/OrderInfoXML.aspx". This is used to send categories from DSF to PS.
- **DSF Site Key** – found in DSF under Administration > Site Settings > About > Site Key. Copy this value from DSF and paste it here. This is used to send categories from DSF to PS.
- **DSF License ID** – Any unique string identifying your PrintStream system. This ID is used to authenticate updates going from PrintStream to DSF.
- **DSF Configuration URL** – The URL to the Configuration service with the DSF2PS web service. (This should be provided by the installer).
- **DSF Integration URL** – The URL to the Integration service with the DSF2PS web service. (This should be provided by the installer).
- **DSF LogFile Path** – A path where DSF xml files will be archived. The default path is displayed.
- **DSF Routing ID** – The routing ID is located in PrintStream under Master Files Reports > Production System > Plants for the System > Default Plant – and is listed as the Integration System Short Code. Copy this value and paste in this field.
- **DSF Web2ps URL** – The URL to the Web2ps web service at ECommerceWeb. (This should be provided by the installer).

**Note** The following settings will be populated by creating the Communication Channel from DSF (Step 2).

- DSF Call Back URL
- DSF Call Back ID
- DSF Device ID

**Note** The following parameters is not used by this integration.

- DSF Punchout Link
-



## 2 – Create Communication Channel in DSF

1. Log onto DSF as Administrator.
2. Click the **Administration** tab.
3. Under *MIS Configuration*, click **Manage Communication Channels**.
4. From the *Manage Communication Channels* page, click **Add New Channel**.
5. From the *Adding New Communication Channel* page, fill out the form.

Storefront Administration Operator View Go

### Manage Communication Channels

Modifying Channel 'DSF\_PS\_Pace' ⓘ

Type: Direct Channel ▼

Name: DSF\_PS\_Pace

Description: DSF\_PS\_Pace

Configuration Url: http://10.35.44.115/DSF2PS/EFICConfiguration.aspx

Secure Communication Url:

Site Call Back Url: ☐ Use SSL

**Sharing Permissions**

Share to all Entities ☐

Unregister Check Status Register Back Add Entities

- a. For *Type*, select **Direct Channel**
  - b. *Name* and *Description* are user defined.
  - c. The *Configuration URL* must match the URL as defined in System Parameters (Section 1).
6. Click **Register** to register your Communication Channel. If successful, your response screen should look similar to this.

Storefront

Administration

Operator View

Go

Manage Communication Channels

✔ Site is Licensed for Communication

Modifying Channel 'DSF\_PS\_Pace'

?

Type: Direct Channel

Name: DSF\_PS\_Pace

Description: DSF\_PS\_Pace

Configuration Url: http://10.35.44.115/DSF2PS/EFIConfiguration.asmx

Secure Communication Url: http://10.35.44.115/DSF2PS/EFIIntegration.asmx

Site Call Back Url: ☐ Use SSL

Edit

Sharing Permissions

Share to all Entities ☐

Add Entities

Unregister

Check Status

Register

Back

**Note** *Secure Communication URL* will be assigned by PrintStream, passing the URL from System Parameters.

If you receive an error or differing results, you may view the DSF Event Log for errors, as well as the Event Viewer on the server for PrintStream errors.

If you receive an error regarding the certificate, you may need to set permissions (see following step).

## Self-Hosted Digital StoreFront

Perform these steps if Digital StoreFront is self-hosted *and* you received a certificate error when Registering your Communication Channel.

1. On the Digital StoreFront server, edit the registry as follows:
  - a. In Windows, choose **Start > Run**.
  - b. Enter **regedit** and click **OK**.
  - c. Go to **HKEY\_LOCAL\_MACHINE > Software > Electronics for Imaging > DSF > Certification**.
  - d. Right-click **Certification** and choose **Permissions**.
  - e. Add the local computer accounts **ASPNET** and **IIS\_WPG**, select the **Allow** checkbox for **Full Control**, and click **Apply** for each of these.
  - f. Go to **HKEY\_LOCAL\_MACHINE > Software > Microsoft > SystemCertificates**.
  - g. Right-click on **SystemCertificates** and choose **Permissions**.
  - h. Add the local computer accounts **ASPNET** and **IIS\_WPG**, select the **Allow** checkbox for **Full Control**, and click **Apply** for each of these.
  - i. Click **OK** and close the registry.
2. If you are still logged on Digital StoreFront, log off. Log in as Administrator and repeat Step 2 (Create Communication Channel in DSF).

## 3 – Create MIS System in DSF

**Note** You must have the Routing Identifiers created for each Company/Plant in Master Files Reports. If you are integrated with Monarch, you must have the Parent Company created as well.

1. Log onto DSF as Administrator.
2. Click the **Administration** tab.
3. Under *MIS Configuration*, click **MIS Systems**.
4. On the MIS Systems page, click **Add New MIS**.
5. If PrintStream is integrated with Pace, follow the instructions under Pace Type MIS System. If PrintStream is integrated with Monarch, follow the instructions under Monarch Type MIS System.

**Pace Type MIS System**

MIS Type:	EFI Pace
Name:	Pace Test

Description:	Pace Test MSI
--------------	---------------

Routing Identifier:	Impressive Impressions
---------------------	------------------------

Transaction Node Name:	
------------------------	--

Communication Channel:	PS Pace
------------------------	---------

Device Id:	
------------	--

  
**Order Settings:**  

<input checked="" type="checkbox"/> Asynchronous Order Submission
<input type="checkbox"/> Reject orders on MIS communication failure
<input checked="" type="checkbox"/> Accepts Single Order
<input type="checkbox"/> Include Print Preview Thumbnail
<input type="checkbox"/> Show Inventory for Buyer by Default

  
**Invoice Settings:**  

<input checked="" type="checkbox"/> Transmits Invoice PDF
<input checked="" type="checkbox"/> Update Order With Final Invoice

Credit Cards:	Charge on MIS Request
---------------	-----------------------

  
**Other Settings:**  

<input checked="" type="checkbox"/> Display MIS Shipping Amounts To Buyer
---

Number Of Decimals:	4
---------------------	---

PO Number Max Length:	14
-----------------------	----

Job Completed Statuses:	Completed;Shipped
-------------------------	-------------------

Job Cancelled Statuses:	Cancelled
-------------------------	-----------

<input type="checkbox"/> Enable Company Bypass
--

- a. *MIS Type* – Select **EFI Pace MIS**.
- b. *Name* and *Description* are user defined.
- c. *Routing Identifier* – Enter the SysID (Integration System Short Code) for the Pace system, as it is defined in the Plant definition screen. This value will be used to authenticate update requests coming from PrintStream to DSF.

Company Code 01	Company Name PSWeb13Pace		
Plant Code	0100	Integration Parent System ID	
Plant Mail Code		Integration System Short Code	P123
Plant Name	01 Default Plant		

- d. *Communication Channel* – Select the channel created in Section 2.
  - e. *Accepts Single Order* – Check “on”.
  - f. *Reject orders on MIS communication failure* – Check “on”.
  - g. *Job Completed Statuses* – set as shown to match PrintStream.
  - h. *Job Cancelled Statuses* – set as shown to match PrintStream.
6. Continue down the form page as follows.

URL:   
 User Name:   
 Password:

**Security**  
 Owner: administrator

Access Permissions:
 

Name	Company	Type	View Only	
Current Owner		Built-in	<input checked="" type="checkbox"/>	<input type="button" value="Remove"/>


Register Website for MIS updates:

- a. Enter DSF administrator and password.
- b. Click **Save**, then **Register** to *Register Website for MIS updates*.

7. If successful, you should receive this message.

**MIS Systems**

Setup Synchronization

 **Successfully Registered the site for Asynchronous Communication.**

MIS Type:

Name:

### Monarch Type MIS System

1. Set up the Parent MIS. This is the Monarch Holding Company.

Synchronization

MIS Type:

Name:

Parent MIS:

Description:

Routing Identifier:

Transaction Node Name:

Communication Channel:

Device Id:

- MIS Type* – Select **EFI Monarch**.
- Name* and *Description* are user defined.
- Note – *Parent MIS* will be filled in automatically.
- Routing Identifier* – Enter the SysID (Integration System Short Code) for the Parent Monarch system, as it is defined in the Plant definition screen. This value will be used to authenticate update requests coming from PrintStream to DSF.

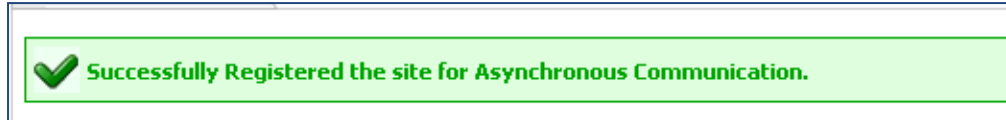
Company Code 01	Company Name Sigler Companies	
Plant Code	0000	Integration Parent System ID TestParent
Plant Mail Code		Integration System Short Code TestParent
Plant Name	00 Default Plant	

**Note** There should be an *Integration Parent System ID*. If not, stop now and contact your PrintStream Representative.

- Communication Channel* – Select the channel created in Section 2.
- Accepts Single Order* – Check “on”.

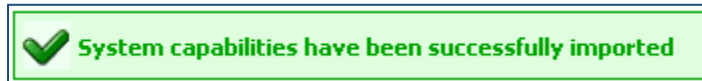
- g. *Reject orders on MIS communication failure* – Check “on”.
- i. Click **Save**, then **Register** to Register Website for MIS updates.

You should get this response.



Note – the Parent MIS will be the same as the Name.

- ii. Next, click **Request System Capabilities**. This process will pull the true Parent MIS from PrintStream and record is as the Parent MIS in DSF.



- 2. Next, set up the MIS system for the Company/Plant you are working with in PrintStream.

Setup

Synchronization

MIS Type: EF Monarch

Name: MonarchTest

Parent MIS: SiglerParent

Description: Monarch test Company

Routing Identifier: MonarchTest

Transaction Node Name:

Communication Channel: Printstream

Device Id:

Order Settings:

☒ Asynchronous Order Submission
 ☐ Reject orders on MIS communication failure
 ☒ Accepts Single Order
 ☐ Include Print Preview Thumbnail
 ☐ Show Inventory for Buyer by Default

Invoice Settings:

☒ Transmits Invoice PDF
 ☒ Update Order With Final Invoice
 

Credit Cards: Charge on MIS Request

Other Settings:

☐ Display MIS Shipping Amounts To Buyer
 

Number Of Decimals: 4

PO Number Max Length: 14

Job Completed Statuses: Completed;Shipped

Job Cancelled Statuses: Cancelled



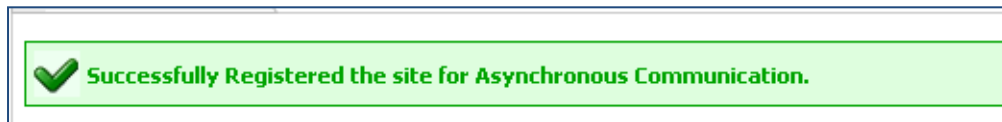
- a. *MIS Type* – Select **EFI Monarch**.
- b. *Name* and *Description* are user defined.
- c. Note – *Parent MIS* will be filled in automatically.
- d. *Routing Identifier* – Enter the SysID (Integration System Short Code) for the Monarch system, as it is defined in the Plant definition screen. This value will be used to authenticate update requests coming from PrintStream to DSF.

Company Code 01	Company Name Sigler Companies		
Plant Code	0100	Integration Parent System ID	TestParent
Plant Mail Code		Integration System Short Code	TestCo
Plant Name	01 Default Plant		

**Note** There should be an *Integration Parent System ID*, which will be the same Parent Sys ID as the Parent plant in the previous step. If not, stop now and contact your PrintStream Representative.

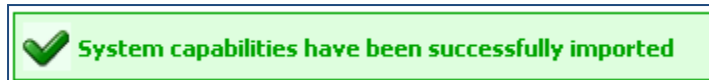
- e. *Communication Channel* – Select the channel created in Section 2.
- f. *Accepts Single Order* – Check “on”.
- g. *Reject orders on MIS communication failure* – Check “on”.
- i. Click **Save**, then **Register** to Register Website for MIS updates.

You should get this response.



Note – the Parent MIS will be the same as the Name.

- ii. Next, click **Request System Capabilities**. This process will pull the true Parent MIS from PrintStream and record is as the Parent MIS in DSF.



3. If you look at the System Parameter values for DSF Integration, all the options should now have values. (Ignore DSF Routing ID, as this information is now stored in the Plant.)

DSF Integration			
	Parameter Name	User can over-ride	Value
	DSF License ID	<input type="checkbox"/>	Monarch_Test_0327
	DSF Call Back URL	<input type="checkbox"/>	http://ps-dsf-02:80/DSF/AsyncCommHandler.ashx?SITEGUID=c9a65f05-c405-49...
	DSF Call Back ID	<input type="checkbox"/>	6abba613-77ec-491b-a666-64c3602fb970
	DSF Configuration URL	<input type="checkbox"/>	http://10.27.64.49/DSF2PS/EFIConfiguration.aspx
	DSF Integration URL	<input type="checkbox"/>	http://10.27.64.49/DSF2PS/EFIIntegration.aspx
	DSF Logfile Path	<input type="checkbox"/>	\\DSF2PS\\LogFiles
	DSF Routing ID	<input type="checkbox"/>	MonarchTestCo
	DSF Device ID	<input type="checkbox"/>	6abba613-77ec-491b-a666-64c3602fb970
	DSF Punchout Link	<input type="checkbox"/>	http://psweb12.printstream.com/link/default.asp
	DSF WEB2PS URL	<input type="checkbox"/>	http://10.27.64.49/Web2PSWCF.WebService/ECommerceWeb.aspx
	Allow Recipient Update	<input type="checkbox"/>	0

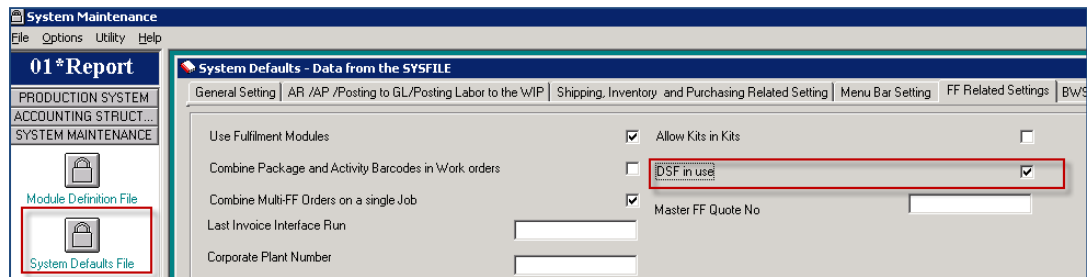
## 4 – Turn on DSF in PrintStream

This step requires assistance from your EFI Fulfillment Rep.

In order for PrintStream to send data to DSF, the “DSF In Use” must be turned on in Master Files Reports, System Defaults File.

**Note** This is a password protected screen. You will need the assistance of your EFI Fulfillment Rep in order to complete this step.

1. Run Master Files Reports.
2. Click **System Maintenance**.
3. Click **System Defaults File**.
4. Enter a password.
5. Click **FF Related Settings**.
6. Select the **DSF In Use** check box.
7. Click **Save**.



**Note** Once this option is turned on, the next fulfillment order id will be set to 1000000001 (1 billion 1). You will notice this when you enter or receive orders from sources other than DSF.

At this point, we need to reseed the fulfillment order id. DSF orders will seed from a specific order id (this is handled in Step 5), while PrintStream orders will seed from a different starting point. For example, PrintStream orders may begin at 5,000,000, while DSF orders may begin at 100,000. This allows DSF orders to increment from a different range than PrintStream.

**Note** If you have duplicate Customer Recipient Ids, you will be warned. This option may not be turned on until the duplicate Customer Recipient Ids have been cleaned up. If you have a large number of duplicates, we can provide a utility to assist with the cleanup. Please reach out to PrintStream Support if this is the case

This SQL query identifies duplicate customer recipient ids.

```
select cust_recip_id, count(*) RecCount from recipient where
isnull(cust_recip_id,'') != '' group by cust_recip_id having count(*) > 1
```

## 5 – Reset next Order ID in DSF

This step requires assistance from your EFI Fulfillment Rep.

In order to accept orders from DSF, we must use the DSF order ID passed from DSF. In the previous step, we reset the next order ID in PrintStream. Now we must do the same in DSF.

Since DSF does not have a mechanism to accomplish this task from the web site, it must be done from SQL with the assistance of EFI.

We will set the next DSF Order ID to be some number different than the last Printstream order ID used before being reseeded.

/\*

From 8.0 We are using Sequence generator for OrderID. For resetting the orderid,

now we need to Alter this sequence object (Partner\_1 is the site wide sequence object created for 8.0).

Please substitute "NewOrderID" in the below script with the required value

\*/

```
IF EXISTS(SELECT * FROM sys.sequences WHERE object_id=object_id('Partner_1'))
```

```
BEGIN
```

```
    ALTER SEQUENCE [dbo].[Partner_1] RESTART WITH NewOrderID INCREMENT BY 1
    MINVALUE 1 NO CACHE;
```

```
END
```

This query is for pre 8.0 only

```
DBCC CHECKIDENT (OrderNumberGeneratorForDSFOrders, RESEED, 1000)
```

The next DSF order ID must be different than the last used order ID in Printstream, before turning on DSF and reseeding.

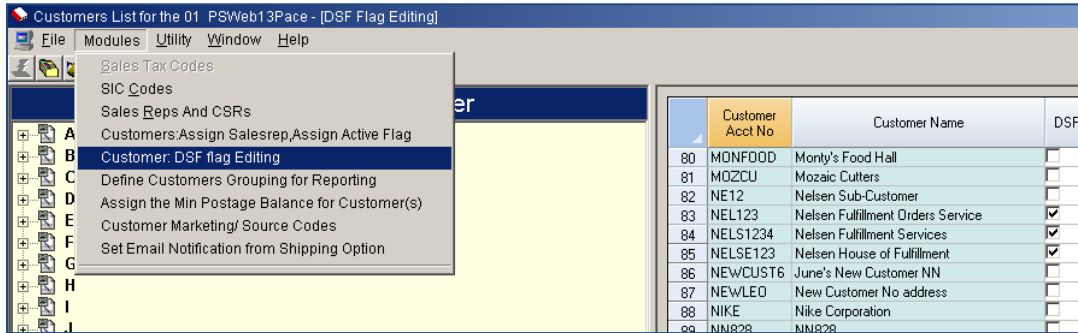
To find the last used order id in Printstream, run this query in SQL, against the Printstream database:

```
Select max(so_id) from Sales_Order
```

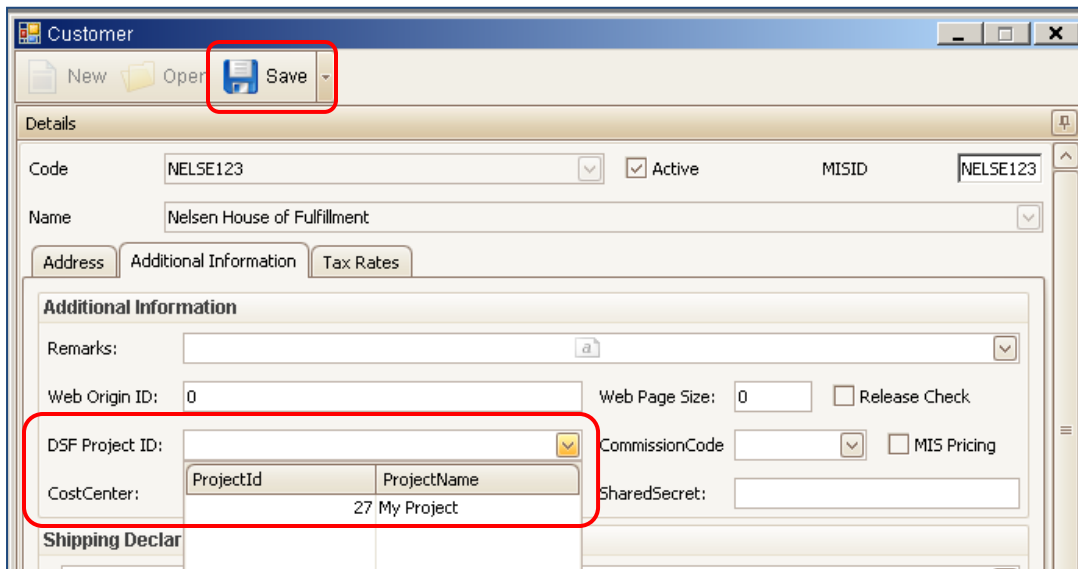
## 6 – Turn on DSF for Customer

This procedure details how to set up customers to use DSF. The first step is to turn DSF on for the customers. The second step is to assign the customer's Fulfillment Project which will be used to process orders coming from DSF.

1. In PrintStream, launch **Master Files Customer**.
2. In the Modules menu, select **Customer: DSF Flag editing**.



3. Select each customer that will be linked to DSF.
4. Click **Save-Reload** or **Save**.
5. From the Fulfillment system, edit the same customer in Customer Maintenance. Find the Customer in the left panel and click to expand. Select Customer Details | Customer Maintenance.
6. Click the **Additional Information** tab.
7. For DSF Project ID, select a project from the drop-down and click **Save**.



## 7 – Share Inventory with DSF

For inventory to be shared with DSF, each item must be tagged for DSF.

1. Run Inventory Manager.
2. On the Main Information screen, select the **DSF Shared** check box.
3. Click **Save**.

The screenshot shows the 'Inventory Manager' application window. The title bar reads 'Inventory Manager'. The menu bar includes 'New', 'Save', 'Search', 'Enter Init Qty', 'View Picture', 'Change Avg. Price', 'Refresh', and 'Settings'. The toolbar contains icons for these functions. Below the menu bar, there are tabs for 'UI', 'Quick Links', 'Master Files', 'Transactions', 'Inventory Setup', and 'Settings and Util'. The main content area is titled 'Master file Inventory'. It features an 'Item Search' section with fields for 'Item #' (1017), 'Inv. Code' (Finished Goods Item), 'Rev. Code' (5678), and 'Description'. Below this is a section titled 'Main Inventory Information - Finished Goods'. Underneath, there's an 'Item Information' section with fields for 'Item #' (1017), 'Inventory Code' (Finished Goods Item), and 'Revision Code'. A tabbed interface shows 'Main Information' as the active tab. Below the tabs is an 'Inventory Description' section with a 'Description' field containing 'Finished Goods Item'. At the bottom, there are three checkboxes: 'DSF Shared' (checked and highlighted with a red box), 'Combine in Carton', and 'Partial POD'.

**Note** The items must be added to the Nomination for the Project linked to DSF.

## 8 – Synchronize PrintStream with DSF

The DSF Synchronization tool, found in Fulfillment, allows you to push data to DSF all at once. This includes Customers, Recipients (Users), Inventory, and Shipping Methods. Important Note: When using DSF, all Recipients must have a first name.

1. From Fulfillment, select **Definitions > DSF Synchronization**.
2. Click the **Synchronize** button in each section to push data to DSF.

**Note** Customer Synchronization pushes only customer data, while Recipient Synchronization pushes both customer and recipient data. There is no harm running the synchronization repeatedly.

View Last XML displays the xml file generated for the most recent update.

The screenshot shows the 'DSF Synchronization' window with the following details:

- Customers:** Synchronize button, Last Synchronized: 7/12/2012 8:07:21 AM, By: LS, View Last XML link.
- Recipients:** Synchronize button, Last Synchronized: (blank), By: (blank), View Last XML link.
- Inventory:** Synchronize button, Last Synchronized: 7/12/2012 8:07:28 AM, By: LS, View Last XML link.
- Shipping Methods:** Synchronize button, Last Synchronized: 7/12/2012 8:07:34 AM, By: LS, View Last XML link.
- Messages:**
  - Updating Recipients... 37 Recipients updated in DSF
  - Updating Inventory... 2 Items updated in DSF
  - Updating Shipping Methods... 3 Shipping Methods updated in DSF
- Progress Bar:** A series of blue bars at the bottom left.
- Close:** Button at the bottom right.

All customers set as a DSF Customer will be sent to DSF.

All recipients belonging to a customer set as a DSF Customer will be sent to DSF.

**Note** Any recipients set up with a password will be allowed to login to DSF using the same user and password as defined in PrintStream.

All inventory belonging to a customer set as a DSF Customer and tagged as DSF Shared will be sent to DSF, including images. Only static items will be sent. Anything tagged as POD, will NOT be sent; although you can map a DSF template to a PrintStream POD item. (See section regarding POD items).

All shipping methods attached to the project that is defined as the DSF Project ID for a DSF customer will be sent to DSF.

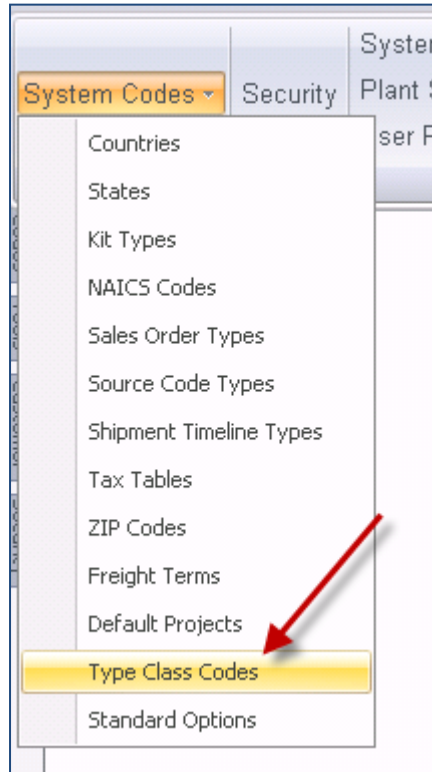
**Note** This tool updates all DSF related data. DSF is also updated for each specific record from these functions.

- Master Files Customer (customer)
- Recipient Maintenance (recipients)
- Master Files Inventory (inventory)
- Item Nomination (inventory)
- Project Master (shipping methods)

## 9 – Set up Asset Types

Asset types need to be defined for document classification for AdHoc orders.

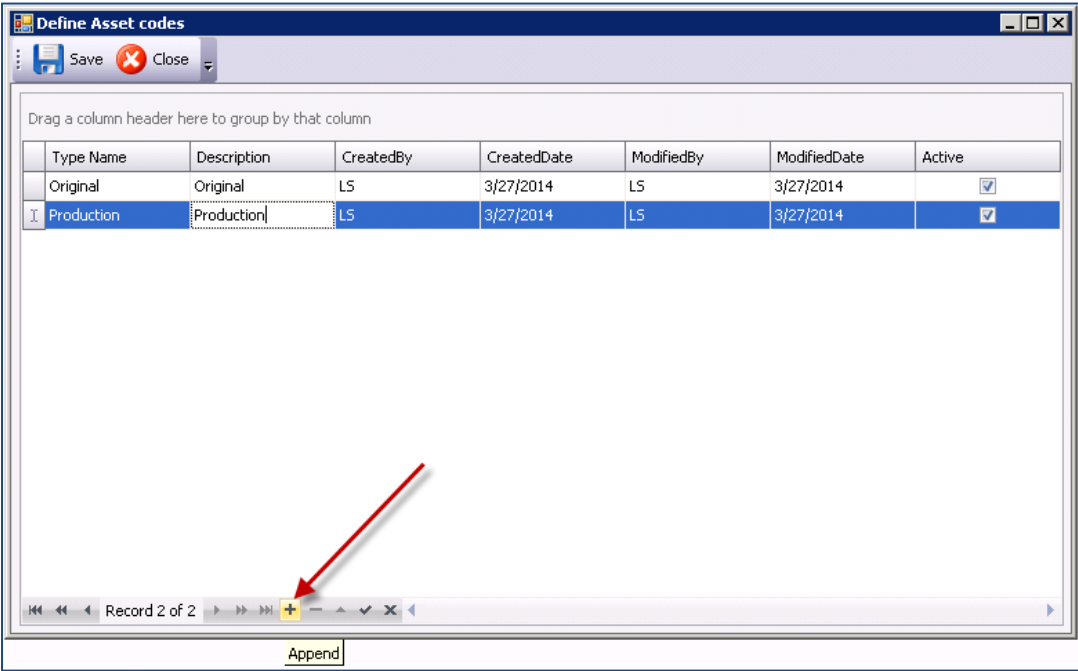
1. From the **FF.Net** menu, select **Definitions**.
2. Click **System Codes**.
3. From the menu, select **Type Class Codes**.



4. Select the **Type Class Asset** from the drop-down and click **OK**.



5. In the Define Asset Codes window, click the **Append** icon at the bottom of the form to add a new Asset Type.



6. If they do not exist, add the following Asset Types. (**Note:** Correct spelling counts).
- Original
  - Production
7. Click **Save** to save your changes.



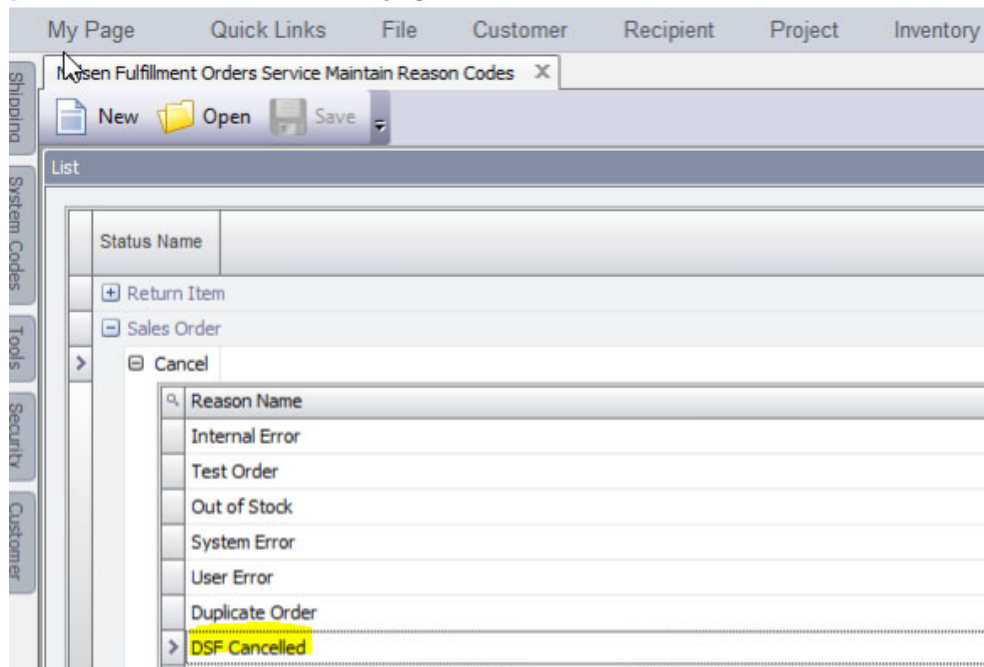
## 10 – Reason Codes

When cancelling or editing orders, PrintStream requires a reason code for the action.

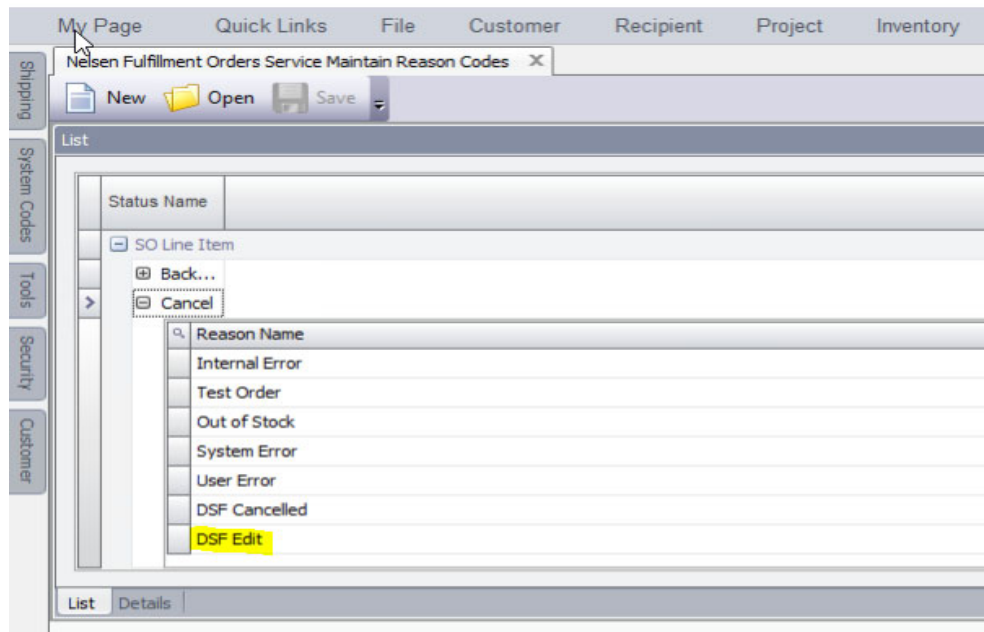
In order to process a cancellation or edit from DSF for an existing order, these Reason Codes must be created for each DSF Integrated customer in PrintStream. Reason Codes are found in Fulfillment under Customer > Customer Codes > Status Reason Codes.

**Note** The spelling of the Reason Name must be exactly as displayed.

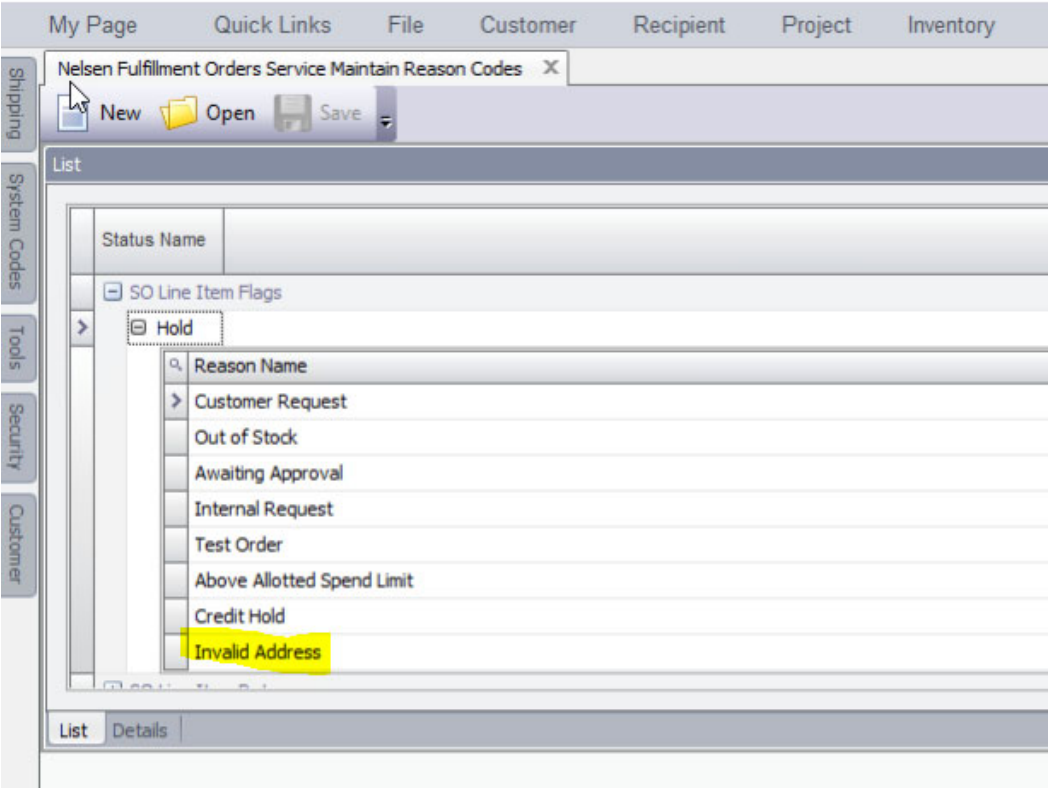
This is for Order Cancel.



This is for Line Item Cancel.



This is for Line Item Hold.



## 11 – Project Setting - Requires Customer Order Number

Please check and make sure the option for “Requires Customer Order” found under the Project > Sales Order settings is not turned on. DSF will not work if this option is turned on. Requires Customer Batch ID should also not be selected.

Project Master - Robs Outdoor Seasons Shop (Outdoor Products)

Save Delete

Customer Robs Outdoor Seaso... Project Outdoor Products Inactive Projects?

My Page Project Master

Project Maintenance

Sales Order Preferences Sales Order Charges

☒ Require Customer Batch ID ☒ Require Customer Order Number

☐ Allow Separate Ship To Address ☐ Allow Ship To at Line Items

☐ Show System Shipping Profiles

☒ Delete Orders in Created Status

Auto-Release Options

Do not Auto-Release

## Transaction Log

All update transactions will be added to the Interface Request log to be processed by the EFI Integration Win webservice.

Group	Author	Seq. Critical	Resp. Requi...	Entered	Processed	Status	Sou...	Tran...	Request ID
DSFOrder	P5	N	Y	2/28/2014 10:50 AM	2/28/2014 11:19 AM	F	P	28	28
DSFOrder	P5	N	Y	2/28/2014 11:22 AM	3/3/2014 11:26 AM	S	P	29	29
DSFOrder	P5	N	Y	3/3/2014 11:16 AM	3/3/2014 11:23 AM	F	P	30	30
DSFOrder	P5	N	Y	3/3/2014 11:28 AM	3/3/2014 11:29 AM	S	P	31	31
DSFOrder	P5	N	Y	3/6/2014 4:13 PM	3/10/2014 2:11 PM	F	P	32	32
DSFOrder	P5	N	Y	3/6/2014 4:22 PM	3/10/2014 2:13 PM	F	P	33	33
DSFOrder	P5	N	Y	3/10/2014 2:22 PM	3/10/2014 2:51 PM	S	P	34	34
DSFOrder	P5	N	Y	3/10/2014 2:51 PM		F	P	35	35
DSFOrder	P5	N	Y	3/10/2014 2:53 PM	3/10/2014 2:54 PM	S	P	36	36

## Update Transactions

All update transactions (everything coming from PrintStream to DSF) will be posted to the Interface Request table as Unprocessed and therefore will be processed by the service.

All responses will be managed using the Request Review screen (above). Failed transactions may be resubmitted once fixed.

## Order Submit

Order requests coming from DSF to PrintStream will be posted in real time. A transaction will be recorded in the Interface Request table (either Success or Failure). All responses will be available for review using the Request Review screen (above). Failed order transactions may be resubmitted, if necessary.

**Note** The System Parameter DSF Web2ps URL (see page 3) MUST be set in order for DSF Orders to be resubmitted.

## General Setup Information

The following sections are informational and may be covered in more depth with your DSF or PrintStream trainer.

### DSF Setup (Inventory)

Once the items are activated, they need to be Published to a Storefront which exposes the item in the catalog. This will be covered with a DSF Trainer.

**Note** Before publishing, you will need to create Storefronts to segregate inventory between Companies (Customers in PrintStream).

1. Select the item(s) you wish to publish and click Publish.

**Manage Products (12.16 Kb)**

finished

Show: 10 1-4 of 4 < Prev 1 Next >

Delete Create Kit Publish Consolidate Calculate Size Copy Create Product

<input type="checkbox"/>	Name ▲	Display As	Display Priority	ID #	Type	Job Ticket	Price	Active	Size
<input type="checkbox"/>	<a href="#">a new finished goods item</a>	a new finished goods item	Standard	<a href="#">Finished Goods item</a>	Non Printed Products		Yes	<input type="radio"/> No	<a href="#">0</a>
<input type="checkbox"/>	<a href="#">Description field for FF finished goods item</a>	Description field for FF finished goods item	Standard	<a href="#">A Finished goods item for FF</a>	Non Printed Products		Yes	<input type="radio"/> No	<a href="#">0</a>
<input checked="" type="checkbox"/>	<a href="#">Finished Goods Item</a>	Finished Goods Item	Standard	<a href="#">Finished Goods Item</a>	Non Printed Products		Yes	<input checked="" type="radio"/> Yes	<a href="#">0</a>
<input type="checkbox"/>	<a href="#">to test in FF</a>	to test in FF	Standard	<a href="#">New Finished Goods Item</a>	Non Printed Products		Yes	<input type="radio"/> No	<a href="#">0</a>

Delete Create Kit **Publish** Consolidate Calculate Size Copy


Locked items cannot be deleted or edited.

Show: 10 1-4 of 4 < Prev 1 Next >

2. On the Select Target Category screen, select the target and click **Publish**.

**Select Target Category**

Categories

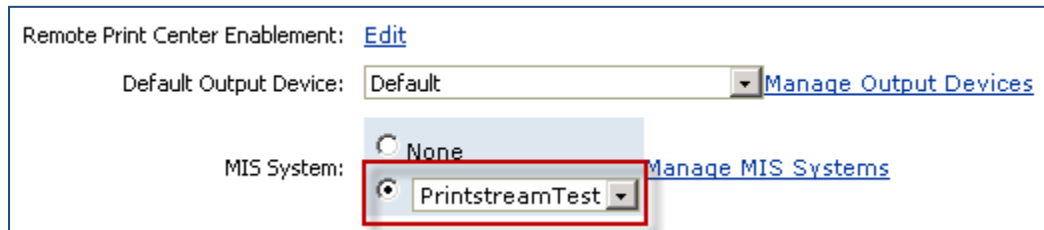
 **Storefront**

**Publish** Cancel

## DSF Setup (Print Shop)

You must create a Print Shop attached to the MIS System created in Section (3).

1. Log in to DSF as Administrator.
2. Click **Administration**.
3. Under **Print Shops**, click **Print Shops**.
4. On the Print Shop page, click **Add New Print Shop**.
5. Set up the Print Shop with the appropriate options. You must attach the Print Shop to your MIS System.



Remote Print Center Enablement: [Edit](#)

Default Output Device:  [Manage Output Devices](#)

MIS System: ☐ None [Manage MIS Systems](#)  
☒

## Available Quantity

The available quantity of all DSF Shared items will be passed from PrintStream to DSF in the Catalog Update transaction.

Item # 128884 Inv. Code SH-OUTCamo Rev. Code Description Outdoor Camo

**Main Inventory Information - Customer**

Item Information

Item # 128884 Inventory Code SH-OUTCamo Revision Code ☐ IsAc

Linked Customer

Account # 50910 Name Robs Outdoor Seasons Shop

Main Information Rules /Settings Item Links Extra Information Printing Specifications **Current Quantities** Fulfillment Settings

Minimum Level 0 pcs or days usage 0

ReOrder Quantity 0 pcs or days usage 0

Max Usage 0 pcs or % 0

Current Quantities

	On Hand	On Order	Total
Quantity	37,481.00	0.00	37,481.00
Committed	64.00	0.00	64.00
Available	37,417.00	0.00	37,417.00
Value	\$0.000	\$0.000	\$0.000

Item Nomination Outdoor Nomination

Inventory Products Nomination Settings

Select All

Drag a column header here to group by that column

	Has Options	MIS Template ID	Inventory Code	Description	Revision	Extended Desc	Available Qty
FOO	<input checked="" type="checkbox"/>		BC-Outdoor	Business Card 4/0			0
FOO	<input checked="" type="checkbox"/>		OB-23456	Outdoor Products Brochure			0
C	<input type="checkbox"/>		SB-45789	High Adventure Sleep Bag		Sleeping Bag	12466
C	<input type="checkbox"/>		SH-OUTCamo	Outdoor Camo Shirts Large		Camo Shirt ...	37417

## Catalog Update Trigger Points

Anytime the available balance of a DSF Shared item is affected, a Catalog Update request is generated.



## Inventory Images

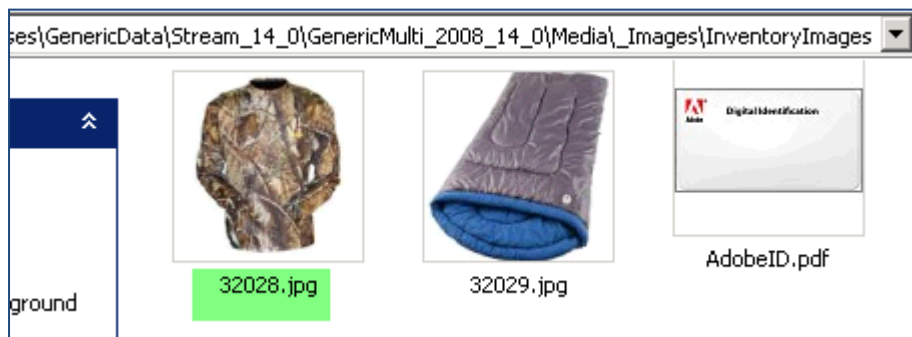
If an image file is associated with a DSF Shared item, this image file will be passed from PrintStream to DSF in the Catalog Update transaction.

The screenshot shows a software window titled "Item Detail:SH-OUTCamo". It contains the following fields and sections:

- Details Section:**
  - Inv. Code: SH-OUTC (highlighted in blue)
  - Item#: 128884
  - Item Revision: (dropdown menu)
  - Description: Outdoor Camo Shirts Large
  - Inventory Status table:
 

On Hand	37481
Committed	64
Release Committed	64
Available	37417
  - On Hold: ☐ On Hold
- Bottom Fields:**
  - Default Pick: T.05.2
  - Master Number: (empty)
  - Image ID: 32028 (highlighted in green)
  - Qty at Def. Loc: 37477
- Nominations Section:**
  - SH-OUTCamo (selected)
  - ☒ New Nom Robs Outdoor Seasons Shop
  - Show Selected Only: ☐
  - Buttons: Save to Nomination, View Image

The image file is stored within the **Media\\_Images\InventoryImages** folder of the PrintStream database folder. The file name must be the **Image ID**.



Sample display of item in the DSF Storefront



Web description for Camo Shirt

Camo Shirt (LG)

Qty

Buy Now

## How to Integrate a PrintStream POD Item

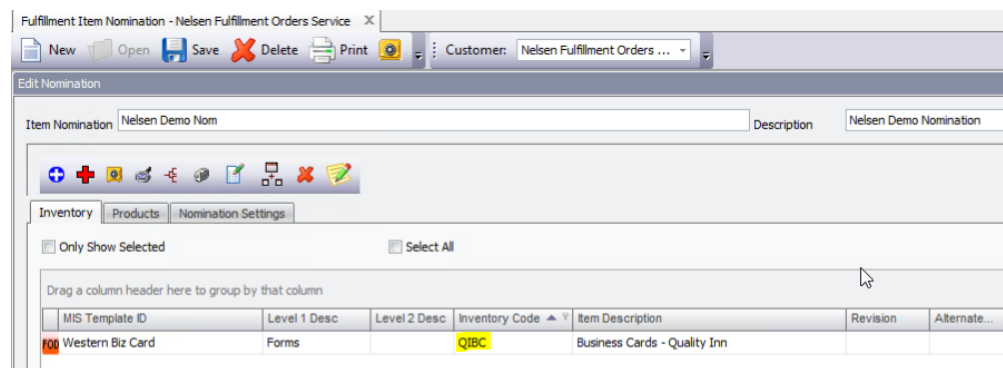
POD items are not sent from PrintStream to DSF. Only Non-Printed Items – Static Items in PrintStream – are transmitted from PrintStream to DSF.

POD items are created in DSF. There are many types of POD items in DSF – AdHoc, Fusion Pro, DSF Design Studio, and others. These are all treated as POD in PrintStream.

### *PrintStream POD items may be integrated with DSF in one of two ways*

1. A POD item is created in PrintStream. The Inventory Code of the POD item must be entered as the **Product ID** and the **Item Template ID** of the corresponding item in DSF. If both fields are not populated with the inventory code the orders for this item will fail.

For example, in PrintStream we have a POD item **Business Cards Quality Inn** in the Nomination. The **Inventory Code** is **OIBC**.



In DSF, the corresponding item is created with the **Product ID** and **Item Template** of **QIBC**.

### Product Information

Product Name:	<input type="text" value="Business Cards Quality Inn"/>
Display As:	<input type="text" value="Business Cards Quality Inn"/>
Product Id:	<input type="text" value="QIBC"/>
Item Template:	<input type="text" value="QIBC"/>
Description Footer:	<input type="text"/>
Direct Product Link:	<a href="/DSF/PRODUCTS/SKU/QIBC.aspx">/DSF/PRODUCTS/SKU/QIBC.aspx</a>
Type:	Static Document

Because the **Product ID** of the DSF item contains a corresponding PrintStream **Inventory Code**, when the item is ordered in DSF a match is made in the PrintStream order.

The screenshot shows the 'Sales Order' window. The 'Sales Order Header' section contains various fields for order management, including Cust Batch ID, PO #, Ship Profile (FedEx Ground), Ship Mode (R01), Ship Before Date (1/27/2020), Source Code, Warehouse (Topeka), Product Type, Input Batch ID (77196), MIS Job #, Ship Timeline, SO Origin, Commission Code, Order Type (Normal), Cost Center, and Order Notes (A). Below the header is a table with columns: N..., A..., Item#, Inv Code, Rev Code, Item Desc, Need Date, UOM, Weight, Gross Qty, Min Qty, Max Qty, Avail Qty, Qty On Ord, Order Qty, Return Qty, Unit Price, Status, S..., MIS Job #, Ship To, Profile Id, and Ship I. The first row of data shows Item# 20068, Inv Code QIBC, Item Desc Business C..., Need Date 1/27/2020, UOM Each, Weight 0, Gross Qty 250, Min Qty 0, Max Qty 0, Avail Qty 6262, Qty On Ord 250, Order Qty 0, Return Qty 0, Unit Price 0.03, Status UnProcessed, Ship To PaceDemo, Profile Id FedEx 2Day, and Ship I #11.

2. A POD item is not created in PrintStream and the DSF Item does not have a Product ID or Item Template ID. In this case, the Generic POD item (inventory code GENPOD) must be included in the Item Nomination in PrintStream. When the DSF order is submitted to PrintStream, GENPOD is used for the DSF item with no Product ID.

For example, this Adhoc Product resides in DSF without a Product ID or Item Template ID.

### Product Information

The 'Product Information' form displays details for an 'Adhoc Product'. Fields include Product Name (Adhoc Product), Display As (Adhoc Product), Product Id (empty), Item Template (empty), Description Footer (empty), Direct Product Link (/DSF/PRODUCTS/SKU/DSF-MON-BUS-C-1.aspx), and Type (Static Document).

When the item is ordered and sent to PrintStream, the item description from DSF is used in the PrintStream order. If PrintStream is integrated with Monarch or Pace, this information follows the order to those systems as well.

The 'Order Confirmation' page displays the following information:

- Order Number: 312933
- Requested Due Date: 9/8/2014 12:00:00 PM
- Submitted on: 9/8/2014 11:55:36 AM EDT
- Submitted by: BP-DSF BP
- Tel: 650-100-2000
- Order Status: User approved
- As of: 9/8/2014 11:55:41 AM EDT
- Print Shop: Monarch Test, 123 Monarch Lane, Norwich, CT 06360, United States
- View Order History

Products	Quantity	Item Price	Item Total
Dean GenPOD 9-8 Item Name: Adhoc product Page)	(1	1	\$29.66
Subtotal:			\$29.66
Total:			\$29.66

When viewing the order in PrintStream, the item will be **GENPOD**, but the Item **Description** will be from DSF.

	Att ach	Inv Code	Rev Code	Item Desc	Need Date	Order Qty	Unit Price	Status
K		GENPOD		Adhoc product	9/8/2014	1	29.66	Comm
					9/8/2014	0		

**Note** The Item Description will not display the DSF description in the legacy Sales Order screen.

## Loading DSF Print Services in PrintStream

POD type items in DSF contain Print Services (Options in PrintStream). To get these Print Services into PrintStream, run the following SQL statement on the DSF SQL server.

```
select
UIFeatureCategories.UIFeatureCategoryId AS 'FeatureCategoryId',
dbo.fn_GetLocalizedString(UIFeatureCategories.DescriptionId, 'en') AS 'FeatureCategory',
(select MemberName FROM EnumerationValues WHERE EnumerationValueId = CategoryTypeEnumId) AS
'FeatureCategoryType',
(select MemberName FROM EnumerationValues WHERE EnumerationValueId = FeatureCapabilityEnumId) AS
'FeatureCategoryCapability',
Features.FeatureId AS 'FeatureId',
dbo.fn_GetLocalizedString(Features.DescriptionId, 'en') AS 'FeatureDescription',
dbo.fn_GetLocalizedString(Features.SecondaryDescriptionId, 'en') AS 'FeatureSecondaryDescription',
Mapping AS 'FeatureMapping',
CASE
WHEN PerformsFeature =1 THEN 'Yes'
WHEN PerformsFeature =0 THEN 'No'
END AS PerformsFeature,
CASE
WHEN RequiresPreprintAction =1 THEN 'Yes'
WHEN RequiresPreprintAction =0 THEN 'No'
END AS RequiresPreprintAction,
CASE
WHEN RequiresPostprintAction =1 THEN 'Yes'
WHEN RequiresPostprintAction =0 THEN 'No'
END AS RequiresPostprintAction, SKU, Imageurl,
GrommetInnerDiameterValue,
(select MemberName FROM EnumerationValues WHERE EnumerationValueId = GrommetInnerDiameterUnit)
AS 'GrommetInnerDiameterUnit',
GrommetOuterDiameterValue,
(select MemberName FROM EnumerationValues WHERE EnumerationValueId = GrommetOuterDiameterUnit)
AS 'GrommetOuterDiameterUnit',
GrommetInsetTopAndBottomValue,
(select MemberName FROM EnumerationValues WHERE EnumerationValueId =
GrommetInsetTopAndBottomUnit) AS 'GrommetInsetTopAndBottomUnit',
AdditionalMediaLengthRequestedValue,
(select MemberName FROM EnumerationValues WHERE EnumerationValueId =
AdditionalMediaLengthRequestedUnit) AS 'AdditionalMediaLengthRequestedUnit',
WeightPerUnit,
ColorR, ColorG, ColorB
from
UIFeatureCategories INNER JOIN Features ON UIFeatureCategories.UIFeatureCategoryId =
Features.DefaultUICategoryId
WHERE
Features.Deleted = 0
ORDER BY UIFeatureCategoryId
```

An Excel file containing all the default DSF Print Services is available for you to import into PrintStream.

The Spreadsheet to download the DSF Print Services must contain the following columns

D208					100021	
	A	B	C	D	E	F
37	483	Print in Color		69	Printing	Y
38	484	Single-Sided		70	Sides	Y
39	485	Double-Sided (Flipped)		70	Sides	Y
40	486	Double-Sided		70	Sides	Y
41	487	Final Width and Height		71	Final Width and Height	Y
42	536	Print in Color, Double Sided		73	Print In Color/Sides	Y
43	539	Print In Black and White, Double Sided		73	Print In Color/Sides	Y
44	537	Print in Color, Double Sided (Tumble)		73	Print In Color/Sides	Y
45	540	Print In Black and White, Double Sided (Tumble)		73	Print In Color/Sides	Y
46	535	Print in Color, Single Sided		73	Print In Color/Sides	Y
47	538	Print In Black and White, Single Sided		73	Print In Color/Sides	Y
48	543	Print on outside, Print In Black and White		74	Front Cover	Y
49	722	Print on outside and inside, Print In Black and White		74	Front Cover	Y
50	544	Print on outside, Print In Color		74	Front Cover	Y
51	723	Print on outside and inside, Print In Color		74	Front Cover	Y
52	541	No Front Cover		74	Front Cover	Y
53	542	Clear Plastic Cover		74	Front Cover	Y
54	547	Print on outside, Print In Black and White		75	Back Cover	Y
55	720	Print on outside and inside, Print In Black and White		75	Back Cover	Y
56	548	Print on outside, Print In Color		75	Back Cover	Y
57	721	Print on outside and inside, Print In Color		75	Back Cover	Y
58	545	No Back Cover		75	Back Cover	Y
59	546	Black Plastic Back		75	Back Cover	Y
60	549	Portrait		76	Orientation	Y
61	550	Landscape		76	Orientation	Y

A – This is the MIS Option ID which needs to match in both Pace and DSF

B – This is the Print Services Description which needs to match the option description in DSF

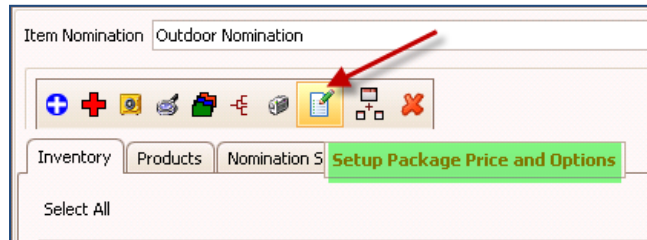
D - This is the Print Services Category which needs to match DSF and Pace

E – This is the Print Services Category Description which needs to match DSF and Pace

F - Enter a Y here to indicate Print Service is active

### To import the default DSF Features

1. From the Nomination screen, highlight a POD item and click here to enter the Package Pricing screen. **This only needs to be setup once on one POD item. It will automatically apply to all other POD items that are integrated with DSF/Pace**



2. Click **Multiple Options** to enter the master Standard Options screen.

The screenshot shows the 'Package Pricing' screen. A red arrow points to the 'Multiple Options' button in the top right corner. The screen contains various input fields for Job Template #, Package #, Inventory Item #, Package Code, Description, etc., and a table for Components/Services.

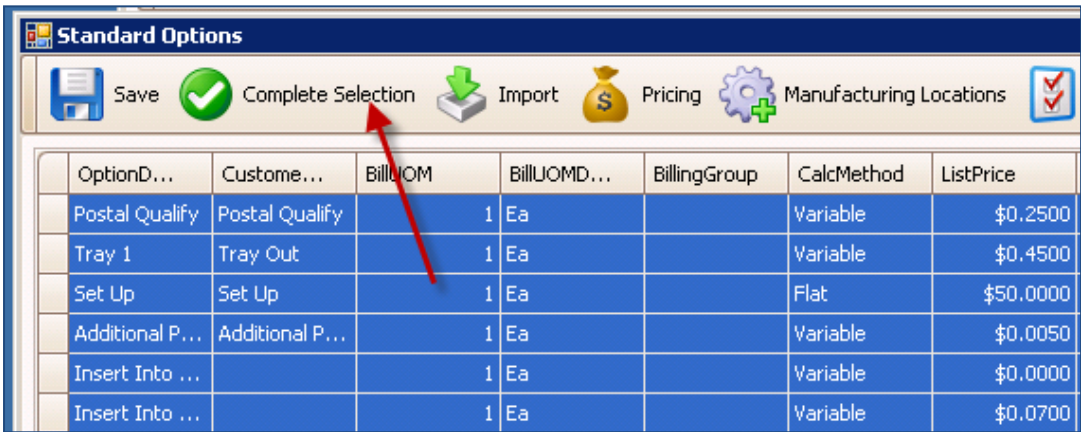
Base Pri...	Standar...	Comput...	Sell Price	Minimum	Billing Gr...	Calc Me...
Components	0.0000		0.0000	<input type="checkbox"/>	Base Price	Variable
Services	0.0000		0.0000	<input type="checkbox"/>	Base Price	Variable

3. Click the **Import** button and import the default DSF Features from the Excel file.

The screenshot shows the 'Standard Options' screen. A red arrow points to the 'Import' button in the top toolbar. Below the toolbar is a table with columns: OptionD..., Custome..., BillUOM, BillUOMD..., BillingGroup, CalcMethod, and ListPrice.

OptionD...	Custome...	BillUOM	BillUOMD...	BillingGroup	CalcMethod	ListPrice
Postal Qualify	Postal Qualify	1 Ea			Variable	\$0.2500
Tray 1	Tray Out	1 Ea			Variable	\$0.4500
Set Up	Set Up	1 Ea			Flat	\$50.0000
Additional P...	Additional P...	1 Ea			Variable	\$0.0050
Insert Into ...		1 Ea			Variable	\$0.0000
Insert Into ...		1 Ea			Variable	\$0.0700
Misnesh	Misnesh	1 Ea			Variable	\$0.0000

4. Once the Options (Features) are loaded, select all the features in the grid, and click **Complete Selection** to bring the Options into your item.



OptionD...	Custome...	BillUOM	BillUOMD...	BillingGroup	CalcMethod	ListPrice
Postal Qualify	Postal Qualify	1	Ea		Variable	\$0.2500
Tray 1	Tray Out	1	Ea		Variable	\$0.4500
Set Up	Set Up	1	Ea		Flat	\$50.0000
Additional P...	Additional P...	1	Ea		Variable	\$0.0050
Insert Into ...		1	Ea		Variable	\$0.0000
Insert Into ...		1	Ea		Variable	\$0.0700

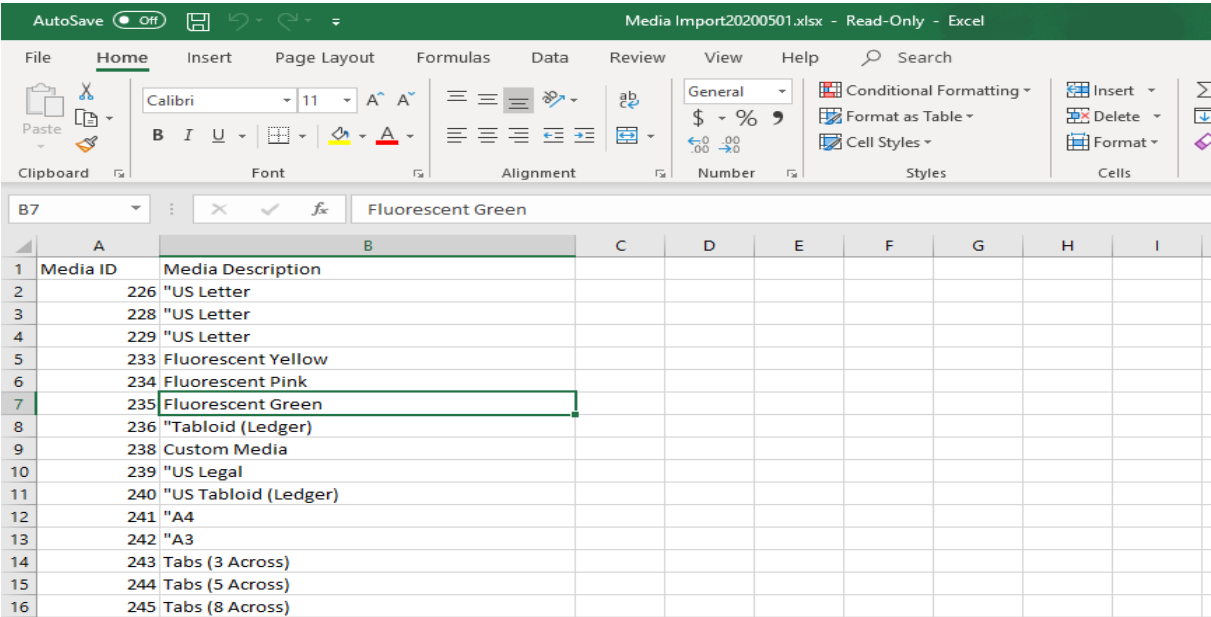
- 5. Click **Save** to exit the Standard Options screen.
- 6. Click **Save** to exit the Package Pricing screen.
- 7. Click **Save** to exist the item Nomination screen.

**Note** You only need to import the DSF Features to the master Standard Options once. Once they exist in the master list, they may be added to any item in your Nomination.

If any additional or custom Features are added to your DSF Storefront, they must be manually added to the master Standard Options in PrintStream, and then brought into your items.

Import Media Options

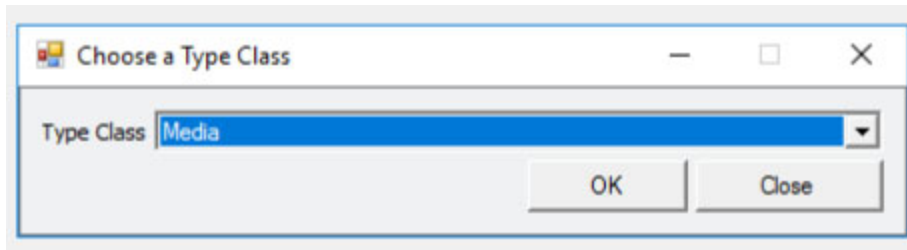
For PrintStream Pace Integrations you will need to import the media options from DSF into PrintStream. Here is a sample of the spreadsheet used to import the media options.



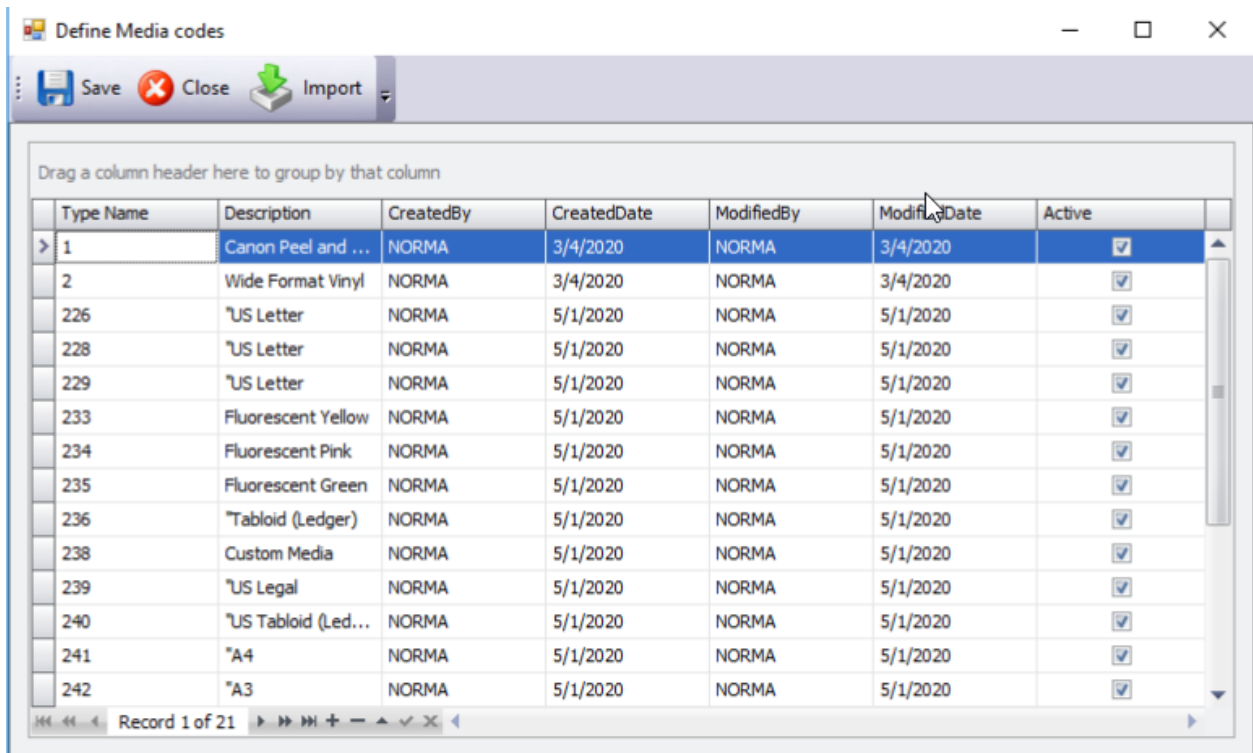
Media ID	Media Description
226	"US Letter
228	"US Letter
229	"US Letter
233	Fluorescent Yellow
234	Fluorescent Pink
235	Fluorescent Green
236	"Tabloid (Ledger)
238	Custom Media
239	"US Legal
240	"US Tabloid (Ledger)
241	"A4
242	"A3
243	Tabs (3 Across)
244	Tabs (5 Across)
245	Tabs (8 Across)



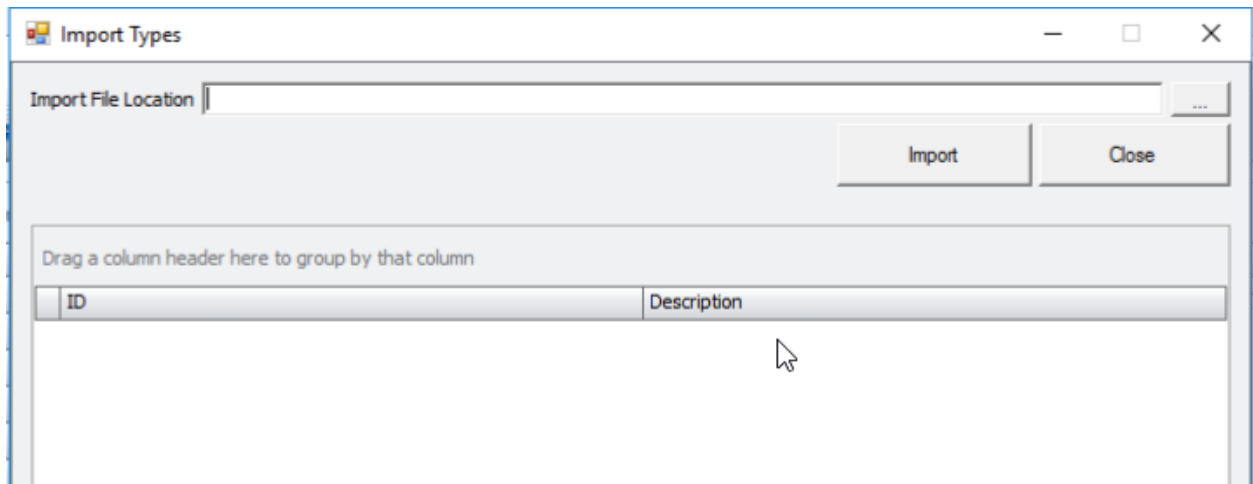
The Media options are imported under Fulfillment > Definitions > System Codes > Type Class Codes > Media



When you open this screen, you will see the Media options that have already been imported.



If the screen is blank or to import new options click on the "Import" icon on the toolbar you will see a screen like this where you can select the file to import then click on the Import button to add the media types.



## Import Impressions

Pace uses the Impression information sent from DSF and passed through PrintStream to layout the product for pace. These items are contained in DSF. Here is an example of an impression's spreadsheet

ID	ImpressionDescription	Active
1	No Impression	Y
2	Standard Print (Precut Size) / Black & White / Simplex	Y
3	Standard Print (Precut Size) / Black & White / Duplex	Y
4	Standard Print (Precut Size) / Color / Simplex	Y
5	Standard Print (Precut Size) / Color / Duplex	Y
6	Large Format Print (Custom Size) / Black & White	Y
7	Large Format Print (Custom Size) / Color	Y
8	Large Format Print (Precut Size) / Black & White	Y
9	Large Format Print (Precut Size) / Color	Y
10	Tab Insert	Y
11	Standard Print (Custom Size) / Black & White / Simplex	Y
12	Standard Print (Custom Size) / Black & White / Duplex	Y
13	Standard Print (Custom Size) / Color / Simplex	Y
14	Standard Print (Custom Size) / Color / Duplex	Y

The Impression options are imported under Fulfillment > Definitions > System Codes > Type Class Codes > Impression Mode

Choose a Type Class

Type Class: ImpressionMode

OK Close

When you open the screen, it will either be blank or will contain impressions that have already been imported

Define ImpressionMode codes

Save Close Import

Type Name	Description	CreatedBy	CreatedDate	ModifiedBy	ModifiedDate	Active
0	Unknown Impres...	SV	9/12/2017	SV	9/12/2017	<input checked="" type="checkbox"/>
1	No Impression	SV	9/12/2017	NORMA	5/1/2020	<input checked="" type="checkbox"/>
10	Bottom Left (hori...	SV	9/12/2017	NORMA	5/1/2020	<input checked="" type="checkbox"/>
103	5 Holes across top	NORMA	5/1/2020	NORMA	5/1/2020	<input checked="" type="checkbox"/>
107	6 Holes across top	NORMA	5/1/2020	NORMA	5/1/2020	<input checked="" type="checkbox"/>
11	Upper Right (hor...	SV	9/12/2017	NORMA	5/1/2020	<input checked="" type="checkbox"/>
110	7 Holes across top	NORMA	5/1/2020	NORMA	5/1/2020	<input checked="" type="checkbox"/>
12	Bottom Right (ho...	SV	9/12/2017	NORMA	5/1/2020	<input checked="" type="checkbox"/>
121	2 Holes along bo...	NORMA	5/1/2020	NORMA	5/1/2020	<input checked="" type="checkbox"/>
127	3 Holes along bo...	NORMA	5/1/2020	NORMA	5/1/2020	<input checked="" type="checkbox"/>
129	4 Holes along bo...	NORMA	5/1/2020	NORMA	5/1/2020	<input checked="" type="checkbox"/>
13	2 Staples Left Side	SV	9/12/2017	NORMA	5/1/2020	<input checked="" type="checkbox"/>
134	5 Holes along bo...	NORMA	5/1/2020	NORMA	5/1/2020	<input checked="" type="checkbox"/>
138	6 Holes along bo...	NORMA	5/1/2020	NORMA	5/1/2020	<input checked="" type="checkbox"/>

Record 1 of 237

If the screen is blank or to import new options click on the “Import” icon on the toolbar you will see a screen like this where you can select the file to import then click on the Import button to add the Impression Options.

Import File Location

Import Close

Drag a column header here to group by that column

ID	Description
----	-------------

## BOD PrintStream Settings in System Parameters | EFI Integration – New Customer

In PrintStream, navigate to Streamline.Fulfillment.Main | Definitions | System Parameters. Set the following:

BOD Format: 4.0

EFI PrintStream Fulfillment for the Company : (01) Sigler Companies-0100 01 Default Plant

My Page Quick Links File Customer Recipient Project Inventory Event

Fulfillment System Parameters

Save

List

Parameter Group	Parameter Name	User can over-ride...	Value
⊕ Digital Assets			
⊕ DSF Integration			
⊕ EFI Integration			
	FGARNForkIssueFirst	<input type="checkbox"/>	
	Send BOD Response to ItemMa...	<input type="checkbox"/>	Yes
	Maximum Concurrent Requests	<input type="checkbox"/>	1
	Perform Credit Memo	<input type="checkbox"/>	Yes
	MAX Length of Img As String	<input type="checkbox"/>	15000
	iQuote Integration	<input checked="" type="checkbox"/>	
	Order Message in BOD Format	<input type="checkbox"/>	
	Integration Error Notifier Email	<input type="checkbox"/>	norma.nelson@efi.com
	Adhoc Services Activity	<input type="checkbox"/>	Stocking Fee
	WebService Call for ExternalID	<input type="checkbox"/>	0
	Flip External OrderID	<input type="checkbox"/>	0
	Billing Status Before Release	<input type="checkbox"/>	0
	BOD Version	<input type="checkbox"/>	4.0
	Database Table CleanUp Interval	<input type="checkbox"/>	9999999

## BOD PrintStream Settings in Company Level Parameters

In PrintStream, navigate to Streamline.Fulfillment.Main | Definitions | Company Level Parameters. Set the following:

Order Message in BOD Format = Yes  
Item Master Update in BOD Format = No  
Send BOD Response to ItemMaster = Yes

Adhoc Services Activity	Sales Order Save
Maximum Concurrent Requests	
iQuote Integration	
Order Message in BOD Format	Yes
Item Master Update in BOD Format	No
FGARNForKitIssueFirst	
Send BOD Response to ItemMaster	Yes

Parameter Group: Fulfillment Settings

## BOD Pace Connect Settings

In the PrintStream Connect tab of the PrintStream Connect, set the xpaths for the BOD Order format:

PrintStream Connect - PrintStream Connect

Update Duplicate Execute Delete DSF Product Types

Pace Connect Email Options Execution Options Inputs Outputs **PrintStream Connect Setup** Mapping Successful Executions Warnings Failure Executions

### Job Description:

```
concat('PrintStream Order ', //SalesOrderHeader/Extension/efiIDSet[@efiIDSetType="PrimaryID"]/ID)
```

### Job Additional Description:

```
concat(//SalesOrderHeader/CustomerParty/Contact/Extension/efiUserCredentials/Login, '-  
', //SalesOrderHeader/CustomerParty/Contact/PersonName/GivenName, '-  
', //SalesOrderHeader/CustomerParty/Contact/PersonName/FamilyName, '-', //Order/IdData/External/Id)
```

### Job Product Description:

```
concat( substring(//SalesOrderLine/Description/text(), 1, number(string-  
length(//SalesOrderLine/Description/text()) > 0 ))*string-  
length(//SalesOrderLine/Description/text()), substring(//SalesOrderSubLine/Description/text(), 1,  
number(not(string-length(//SalesOrderLine/Description/text()) > 0 ))*string-  
length(//SalesOrderSubLine/Description/text())))
```

### Job Part Description:

```
concat( substring( //SalesOrderLine/Description/text(), 1, number( string-length(  
//SalesOrderLine/Description/text()) > 0 ))*string-  
length(//SalesOrderLine/Description/text()), substring(//SalesOrderSubLine/Description/text(), 1,  
number( not( string-length(//SalesOrderLine/Description/text()) > 0 ))*string-  
length(//SalesOrderSubLine/Description/text())))
```

### Process Pagination Data

In PrintStream Connect tab of the Pace PrintStream Connect, set the Process Pagination Data to ON.

### Default Item Template

Set the Default Item Template to the DEFDSFVAR option.

Job Type for Print Parts: PrintStream Printing

Default Item Template: DEFDSFVAR - Default

Process Pagination Data: ☒

In Pace, deselect the **Legacy Mode** checkbox on the Item Template Info tab of the DEFDSFVAR – Default DSF Item Template.

Item Template : DEFDSFVAR - Default DSF Item Template

Buttons: Update, Duplicate, Delete, ...

Status: Updated

Item Template Info | Lines | @

Code: DEFDSFVAR

Item Template Type: VAR - Default DSF Item

Base Object: Job Part

Description: Default DSF Item Template

Note:

Setup Date: 06/27/2011 Setup By: system

Quantity Expression: @qtyOrdered

Job Product Type: DSFDEF-DSF Default Job Product Type Sales Category: Sales Large Format

Estimate/Vers/Part:

Quote/Product:

Unit Weight:

Weight Per M: 0

Qty Options: N/A Customer:

Job Description:

Recalculation

Auto Recalculate: ☒

Legacy Mode: ☐

Active: ☒

Also verify that the PrintStream Integration URL under Fulfillment > Definitions > Company Level Parameters has /PS1 at the end of the URL like this example

Parameter Name	Value
<b>Parameter Group: Digital Assets</b>	
Allow Combined Digital Assets	
Digital Assets Folder Path	
<b>Parameter Group: EFI Integration</b>	
EFI_Integration	Pace
Integration_URL	http://10.35.44.37/rpc/company:public/printStreamRequestHan...
Integration_Username	
Integration_Password	
System Id	
System Name	
DSF Id	
Validation Webservice URL	http://10.35.44.37/rpc/company:public/services/EFIIntegration...
PrintStream Integration URL	http://localhost/EFIIntegration/Service.svc/PS1
Pace PrintStreamConnect TimeOut	

## BOD PrintStream Settings in System Parameters | EFI Integration – Existing Customer

In PrintStream, navigate to Streamline.Fulfillment.Main | Definitions | System Parameters. Set the following:

BOD Format: 4.0

Parameter Name	User can over-ride...	Value
FGARNForkIssueFirst	<input type="checkbox"/>	
Send BOD Response to ItemMa...	<input type="checkbox"/>	Yes
Maximum Concurrent Requests	<input type="checkbox"/>	1
Perform Credit Memo	<input type="checkbox"/>	Yes
MAX Length of Img As String	<input type="checkbox"/>	15000
iQuote Integration	<input checked="" type="checkbox"/>	
Order Message in BOD Format	<input type="checkbox"/>	
Integration Error Notifier Email	<input type="checkbox"/>	norma.nelson@efi.com
Adhoc Services Activity	<input type="checkbox"/>	Stocking Fee
Webservice Call for ExternalID	<input type="checkbox"/>	0
Flip External OrderID	<input type="checkbox"/>	0
Billing Status Before Release	<input type="checkbox"/>	0
BOD Version	<input type="checkbox"/>	4.0
Database Table CleanUp Interval	<input type="checkbox"/>	9999999

## BOD PrintStream Settings in Company Level Parameters

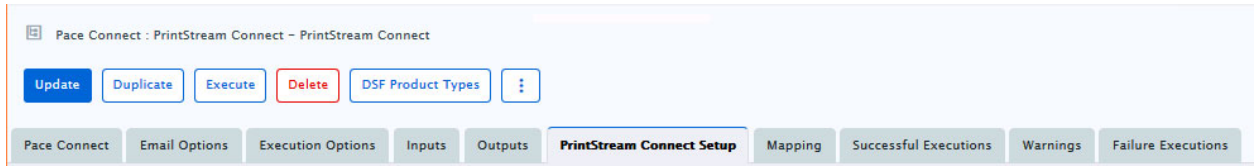
In PrintStream, navigate to Streamline.Fulfillment.Main | Definitions | Company Level Parameters. Set the following:

Order Message in BOD Format = Yes  
Item Master Update in BOD Format = No  
Send BOD Response to ItemMaster = Yes

Integration Error Format Email	
Adhoc Services Activity	Sales Order Save
Maximum Concurrent Requests	
iQuote Integration	
Order Message in BOD Format	Yes
Item Master Update in BOD Format	No
FGARNForKitIssueFirst	
Send BOD Response to ItemMaster	Yes
Parameter Group: Fulfillment Settings	

## BOD Pace Connect Settings

In the PrintStream Connect tab of the PrintStream Connect, set the xpaths for the BOD Order format: **If you have existing data under the connect for each of these areas please make a copy of your existing settings and store in a place you can retrieve then copy each of the areas below into the proper xpath.**



### Job Description:

```
concat('PrintStream Order ', //SalesOrderHeader/Extension/efiIDSet[@efiIDSetType="PrimaryID"]/ID)
```

### Job Additional Description:

```
concat(//SalesOrderHeader/CustomerParty/Contact/Extension/efiUserCredentials/Login, '-  
'//SalesOrderHeader/CustomerParty/Contact/PersonName/GivenName, '-  
'//SalesOrderHeader/CustomerParty/Contact/PersonName/FamilyName, '-',//Order/IdData/External/Id)
```

### Job Product Description:

```
concat( substring(//SalesOrderLine/Description/text(), 1, number(string-  
length(//SalesOrderLine/Description/text()) > 0 )*string-  
length(//SalesOrderLine/Description/text())),substring(//SalesOrderSubLine/Description/text(), 1,  
number(not(string-length(//SalesOrderLine/Description/text()) > 0 ))*string-  
length(//SalesOrderSubLine/Description/text())))
```

### Job Part Description:

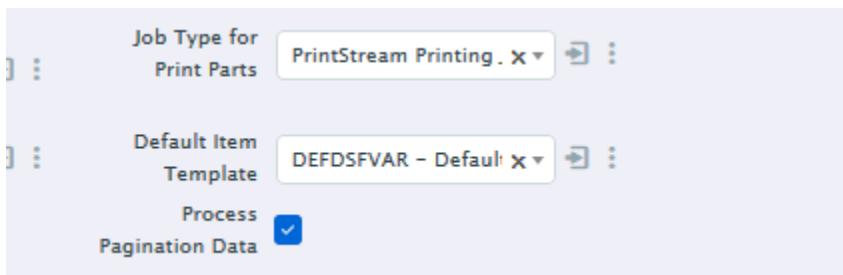
```
concat( substring( //SalesOrderLine/Description/text(),1,number( string-length(  
//SalesOrderLine/Description/text()) > 0 )*string-  
length(//SalesOrderLine/Description/text())),substring(//SalesOrderSubLine/Description/text(), 1,  
number( not( string-length(//SalesOrderLine/Description/text()) > 0 ))*string-  
length(//SalesOrderSubLine/Description/text())))
```

### Process Pagination Data

In PrintStream Connect tab of the Pace PrintStream Connect, set the Process Pagination Data to ON.

### Default Item Template

Set the Default Item Template to the DEFDSFVAR option.





In Pace, deselect the **Legacy Mode** checkbox on the Item Template Info tab of the DEFDSFVAR – Default DSF Item Template.

Item Template : DEFDSFVAR – Default DSF Item Template

Update Duplicate Delete

Updated

Item Template Info Lines

Code: DEFDSFVAR

Item Template Type: VAR – Default DSF Item Base Object: Job Part

Description: Default DSF Item Template

Note:

Setup Date: 06/27/2011 Setup By: system

Quantity Expression: @qtyOrdered

Job Product Type: DSFDEF-DSF Default Job Product Type Sales Category: Sales Large Format

Estimate/Vers/P art:

Quote/Product:

Unit Weight: Weight Per M: 0

Qty Options: N/A Customer:

Job Description:

Recalculation

Auto Recalculate: ☒ Legacy Mode: ☐

Active: ☒

Also verify that the PrintStream Integration URL under Fulfillment > Definitions > Company Level Parameters has /PS1 at the end of the URL like this example

Company Level Parameters For Company : 01

Save Dock Panels Print

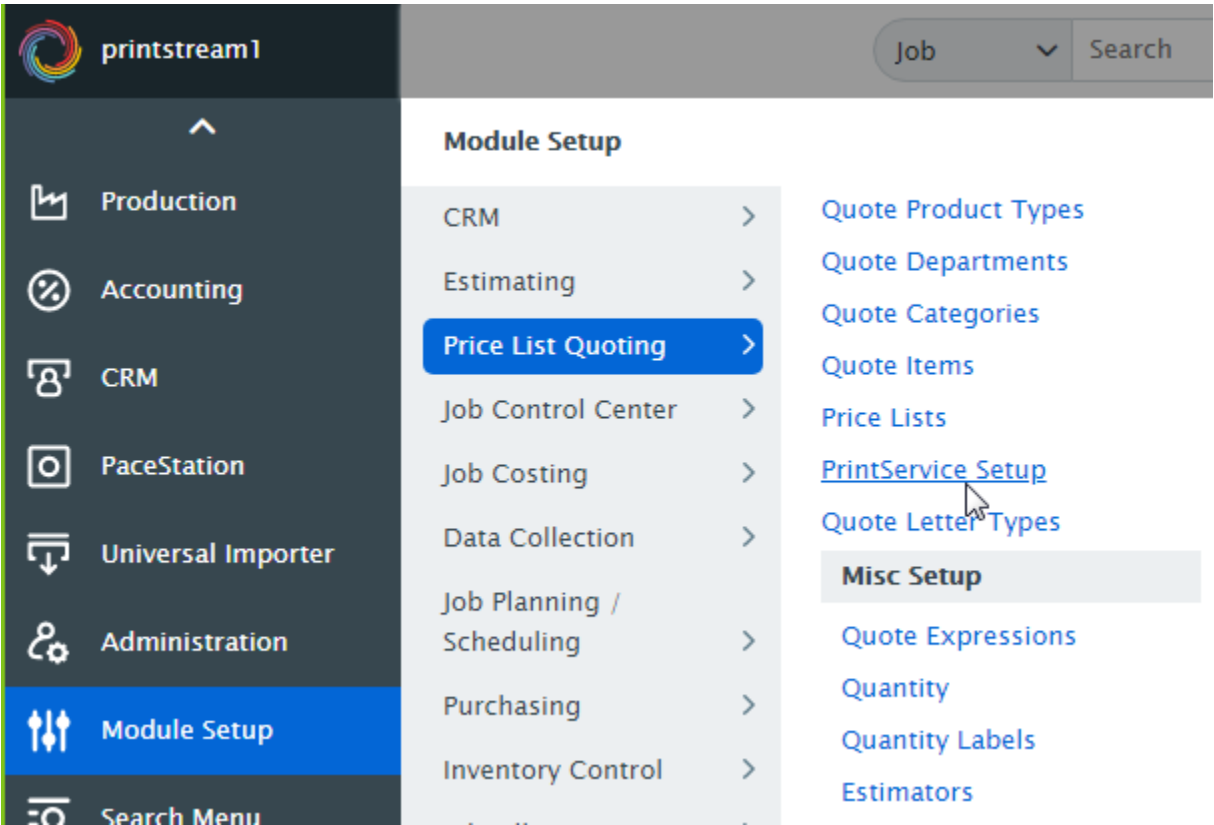
Parameter Group

Parameter Name	Value
Parameter Group: Digital Assets	
Allow Combined Digital Assets	
Digital Assets Folder Path	
Parameter Group: EFI Integration	
EFI_Integration	Pace
Integration_URL	http://10.35.44.37/rpc/company:public/printStreamRequestHan...
Integration_Username	
Integration_Password	
System Id	
System Name	
DSF Id	
Validation WebService URL	http://10.35.44.37/rpc/company:public/services/EFIIntegration...
PrintStream Integration URL	http://localhost/EFIIntegration/Service.svc/PS1
Pace PrintStreamConnect TimeOut	

## Print Services Setup and Use

Important Note: Print Service names (descriptions) **cannot** be duplicated when setting up in DSF. PrintStream must have unique descriptions for each Print Service.

To have the Print Services display on the Job Part Item tab in the Pace job, in Pace navigate to **Module Setup | Price List Quoting | PrintService Setup**



Click the Link Item Templates button.

The screenshot shows a web interface with a top navigation bar containing buttons: 'Update/Next', 'Update', 'Search/Sort', 'Show Quote Item Types', 'Add New Print Services', and 'Show Reviewed Print Services'. Below this is a breadcrumb trail: 'Link Quote Item Types > Link Inventory Items > Link Item Templates > Processed Quote Item Type Print Services'. The 'Link Item Templates' link is highlighted with a blue box. Below the breadcrumb is a search and sort section with dropdown menus for 'Search' and 'Sort', a 'Sort Order' dropdown, and a 'Search/Sort' button. At the bottom left is a 'Print Service' tab, and at the bottom right is a 'Webex Meeting Reminder' notification.

Click on the Mapped Item Template tab below.

The screenshot shows the same web interface as the previous one, but with the 'Link Item Templates' link in the breadcrumb trail highlighted with a blue box. Below the search and sort section, there are two tabs: 'Unmapped Item Template' and 'Mapped Item Template'. The 'Mapped Item Template' tab is selected and highlighted with a blue box. Below the tabs is a table with the following data:

Code	Name	Description	Category	Item Template
PCDS	Print In Color Double Sided	Print In Color Double Sided	Prints	PCDS - Print In Color Double Sided Template
QIBC	Quality Inn Biz Card		Options	BC_40100 - 4/0 Opaque bc

The table has a 'Total Records: 7' indicator in the top right corner.

Drill into the Item Template for the category the Print Service is linked. In this case we had to add the Print in Color Double Sided to the PCDS Category code.

To add services to an existing category, drill into the Item Template for that category. In this case it is **Print In Color Double Sided**

Quote Department : PrintStream ... > Quote Categ... > Quote Item Type : PCDS – Print In ...

Update

Duplicate

Delete

General Information

Qty Calculation Setup

Print Service Setup

Activity Code Setup

Category

Prints

Code

PCDS

Name

Print In Color Double Sided

Customer Viewable

☐

Description

Print In Color Double Sided

Availability

☒ All Areas ☐ Change Order Only ☐ Quote/Estimate Only

Variable Inventory Item

☐

Ask Quantity Multiplier

☒

Show On Invoice

☒

Active

☒

Next go to the Print Service Setup and add the Print Service that is being sent in the order. We were sending Print in Color Double Sided and it was not listed as one of the services. Our Order XML was sending Determination Code 537. That code and description needs to be added to the services. Users will see 537 in the Order XML, not the description.

Quote Department : PrintStream ... > Quote Categ... > Quote Item Type : PCDS - Print In ...

Update Duplicate Delete ⋮

General Information Qty Calculation Setup **Print Service Setup** Activity Code Setup

Total Records: 2

Add New Add Row

Print Service	Quote Item Type	Inventory Item	Default Option
536 - Print in Color - Doub			<input type="checkbox"/>
537 - Print in Color - Doub			<input type="checkbox"/>

⊕ Add Row

Order XML carries the ID only.

Request ID : 17949, Trans Number : 17949, Group : Order, Status : S, Source : P, Entered : 4/3/2020 11:38:42 AM, Author : PrintStream

Set to Re-Process Set as Reviewed Full Response Successes Only Errors Only Successes : 0, Errors : 0 Email Support...

Request XML Find: 537

```

<pcpsi:OrderLineItem>
  <pcpsi:OrderLineItemIdRequired>true</pcpsi:OrderLineItemIdRequired>
  <pcpsi:OrderLineItemId>2541211</pcpsi:OrderLineItemId>
  <pcpsi:DetailType>Feature</pcpsi:DetailType>
  <pcpsi:PriceIndependentOfItemQuantity>false</pcpsi:PriceIndependentOfItemQuantity>
  <pcpsi:CategoryEnum>Feature</pcpsi:CategoryEnum>
  <pcpsi:ChargeDescription />
  <pcpsi:UnitId>
    <pcpsi:IdData>
      <pcpsi:Id>999</pcpsi:Id>
    </pcpsi:IdData>
  </pcpsi:UnitId>
  <pcpsi:IdTypeName>PST</pcpsi:IdTypeName>
  <pcpsi:Description>Ea</pcpsi:Description>
  </pcpsi:UnitId>
  <pcpsi:UnitDescription>Ea</pcpsi:UnitDescription>
  <pcpsi:UnitsPerItem>1</pcpsi:UnitsPerItem>
  <pcpsi:UnitsCharged>55</pcpsi:UnitsCharged>
  <pcpsi:PricePerUnit>1</pcpsi:PricePerUnit>
  <pcpsi:Price>55</pcpsi:Price>
  <pcpsi:Taxable>true</pcpsi:Taxable>
  <pcpsi:FeatureId>
    <pcpsi:IdData>
      <pcpsi:Id>537</pcpsi:Id>
    </pcpsi:IdData>
  </pcpsi:FeatureId>
  <pcpsi:IdTypeName>Feature</pcpsi:IdTypeName>
  <pcpsi:Description>Print_x0020_in_x0020_Color_x002C_x0020_Double_x0020_Sided</pcpsi:Description>
  </pcpsi:IdData>

```

Response XML Find:

```

<?xml version="1.0" encoding="UTF-8"?>
<v3:AcknowledgeSalesOrder
  xmlns:v3="http://www.efi.com/oagis/v3">
  <v3:ApplicationArea>
    <ns:Sender
      xmlns:ns="http://www.openapplications.org/oagis/10">
      <ns:ID
        schemeAgencyID="PAC">ps001</ns:ID>
      </ns:Sender>
      <ns:Receiver
        xmlns:ns="http://www.openapplications.org/oagis/10">
      <ns:ID
        schemeAgencyID="PST" schemeVersionID="PrintStream:20.1.414.0">10</ns:ID>
      </ns:Receiver>
      <ns:CreationDateTime
        xmlns:ns="http://www.openapplications.org/oagis/10">2020-04-03T08:38:39.854-07:00</ns:CreationDateTime>
      <ns:CorrelationID
        xmlns="http://www.openapplications.org/oagis/10">
        <ns:xsd="http://www.w3.org/2001/XMLSchema"
        xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">648bcd9e-d555-4566-a7b9-cd8436ea069e</ns:CorrelationID>
      </v3:ApplicationArea>
      <v3:DataArea>
        <ns:AcknowledgeSalesOrder
          xmlns:ns="http://www.openapplications.org/oagis/10">
          <v3:SalesOrder
            actionCode="Accepted"
            xmlns:xsd="http://www.w3.org/2001/XMLSchema"
            xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
              <v3:SalesOrderHeader
                actionCode="UpSert">
                <v3:Description>SalesOrder:1000268642</v3:Description>
                <DocumentDateTime
                  xmlns:nil="true"
                  xmlns="http://www.openapplications.org/oagis/10"/>

```

Request History

Pace creates the job from the BOD formatted Order XML.

Customer : NEL123 – Nelsen Fulfillment Orders Service > Job : 386253 of 10

Update

Update Version

Create Estimate and Convert

Create Estimate

View Product Pricing

Create Invoice

Job Jacket

Part Jacket

Job38625

CustomerNEL123 – Nelsen Fulfillment Orders Service

StatusOpen/Scheduled

Status Changed04/03/20208:38 AM

DescriptionPrintStream Order

Additional Description–Liz–Bender–

Mfg. Location001 – Headquarters

Legal Entity

Customer Notes

Job Info

Parts Info

Products

Billing Info

Job Contacts

Part Buyouts

Notes

Pace Connect

Click the **Parts Info** tab and then scroll down on the right side until the part is displayed.

Job Info

Parts Info

Products

Billing Info

Job Contacts

Part Buyouts

Notes

Pace Connect

Parts

Add NewAdd Row

Total Records: 1

Print on Demand Cor x

01

Print on Demand Company Owned Item 1 06301

DSFDEF–DSF Def: x

55

Open

Add Row

Click on the icon to the far left of the line.


Print on Demand Cor x



01






Print on Demand Company Owned Item 1 06301



Go to the **Job Part Items** tab.



Navigate Parts P01 - Print on Demand Company Owned Item 1 063016 x ▾

**General** | Date | Billing | Product Info | Materials | Ink | Prep | Print | Finish | Buy Out | **Job Part Items** | PaceConnect | 

Job Product Print on Demand Cor x ▾  


Job Type / Sub Job Type PrintStream Printing J x ▾     

Item Template DEFDSFVAR - Default DSF Item Template  



Estimator  

Print services will be listed here that were sent from DSF/PrintStream for this job part.


Navigate Parts P01 - Print on Demand Company Owned Item 1 063016 x ▾

**General** | Date | Billing | Product Info | Materials | Ink | Prep | Print | Finish | Buy Out | **Job Part Items** | PaceConnect | 

[Add New](#) [Add Options](#) Total Records: 1

Sequence	Department	Category	Quote Item Type	Print Service	UOM
  1	PrintStream Print (WF - Digital)	Prints	PCDS - Print In Color Double Sided	537 Print in Color - Double Sided (Tumble)	EA-Each

Job Jacket for the POD item:

<b>Job: 38625</b>														
<b>Due: 4/3/20</b>														
<b>8:38 AM</b>														
Description: <b>PrintStream Order</b>		Job Type: <b>PrintStream Pr</b> Salesperson: <b>House</b>												
Customer: <b>Nelsen Fulfillment Orders Service</b>		PO #: _____												
8400 Mulberry Blvd.		Priority: <b>Normal</b>												
Suite 418B		Form #: _____												
San Rafael, CA 94904		Previous Job: _____												
Contact: <b>Liz Bender</b>		Ref: _____												
-Liz-Bender-		Terms: <b>Net 30 Days</b>												
		Cust Phone: <b>(214) 566-5666</b> Ext: _____												
		Cust Fax: _____												
<b>SUMMARY OF PARTS</b>														
Part	Description	Final Size	Qty Ordered of	Ship Qty	Pgs	Flat Size	Trim Size	Plies						
01	Print on Demand Company Owned Item 1 063016		55 1	55	2									
<b>PREPRESS / DATA PROCESSING</b>														
Part	Bleeds	PrePress Item	Quantity	Description	Size	Resolution								
<b>PrePress / Data Processing Notes</b>														
Part	Note													
01	The price calculated was based on running 1 up on the sheet.													
<b>MATERIALS</b>														
Part	Wgt	Description / PO	Buy Size	Buy Qty	Run Size	ShtsToPrs	Stock #	PS / BS						
<b>Material Notes</b>														
Part	Note													
01	CustomerPO=12544													
<b>INK</b>														
Part	Colors	Ink Description												
<b>PRINT</b>														
Pt	Frm	Ps	Clrs	V	A	Quantity	Description	Run Size	# Up	Press	Runs	Sheets to M/U Press	Off Press M/R	Qty
01			/								Unknown			
<b>FINISHING WORKFLOW</b>														
Part	Finishing Workflow	Folds												
<b>JOB PART ITEMS</b>														
Part	Description	Item	UOM	Quantity	Price									
01	Print on Demand Company Owned Item 1 063016	Print In Color Double Sided	EA	55	55.00									
<b>SHIPMENT SUMMARY</b>														
Sched Ship Date 4/3/20		Shipment ID 42,565		Ship Via Impressive Impre:Truck										
Liz Bender		Contact Liz Bender												
2140 Medical District														
Dallas, TX 75235		Phone 4154627008		Special Instruction										



## BOD Order XML

An Order XML sent to Pace from PrintStream includes the following data at the beginning of each one:

```
<ProcessSalesOrder xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema" releaseID="3" xmlns="http://www.efi.com/oagis/v3">
```

```
<ApplicationArea>
```

```
<Sender xmlns="http://www.openapplications.org/oagis/10">
```

```
<ConfirmationCodes>
```

```
<ConfirmationCode>Always</ConfirmationCode>
```

```
</ConfirmationCodes>
```

```
<ID schemeVersionID="PrintStream: 19.2.410.0" schemeAgencyID="PST">10</ID>
```

```
</Sender>
```

```
<Receiver xmlns="http://www.openapplications.org/oagis/10">
```

```
<ID schemeAgencyID="PAC">Pace</ID>
```

```
</Receiver>
```

```
<CreationDateTime xmlns="http://www.openapplications.org/oagis/10">2020-03-
02T14:41:32+13:00</CreationDateTime>
```

```
<BODID xmlns="http://www.openapplications.org/oagis/10">4e4c2130-441f-4d5d-85ef-
c55f45957947</BODID>
```

```
</ApplicationArea>
```

```
<DataArea>
```

```
<SalesOrder actionCode="UpSert">
```

```
<SalesOrderHeader actionCode="UpSert">
```

```
<Description>SalesOrder:
```

```
...
```

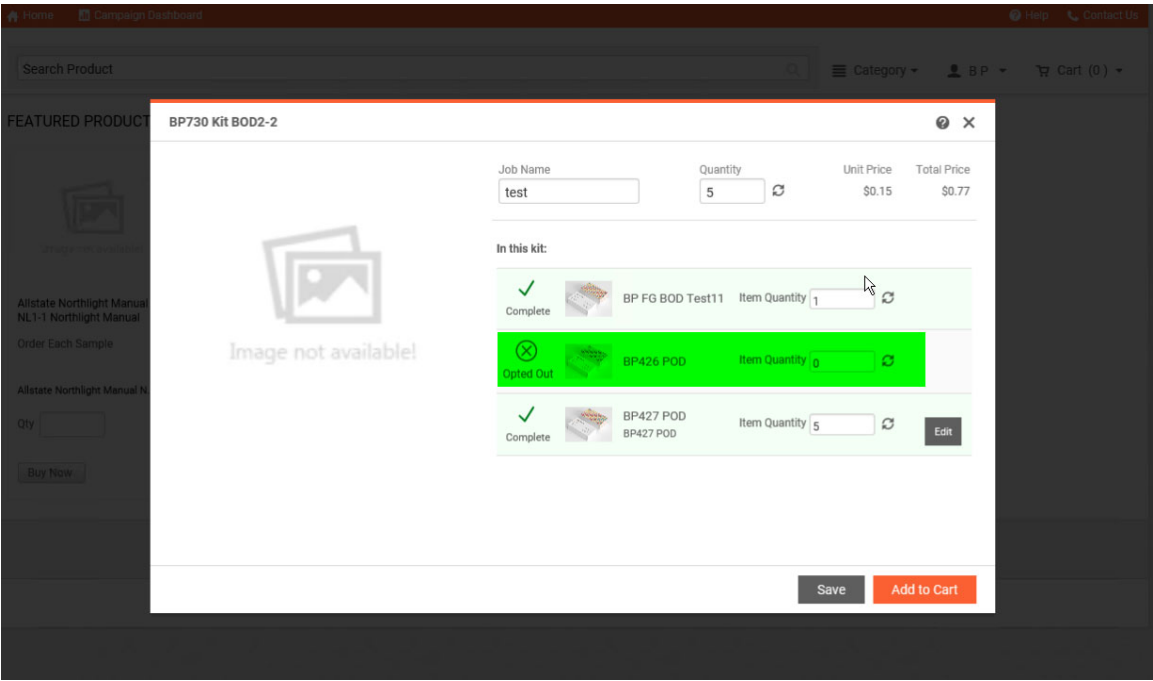
## How to Integrate a PrintStream Kit Item

Kits are mapped to DSF, just like POD items. A kit is created in PrintStream and exists in the Nomination with an Inventory Code. A kit is created in DSF with a Product ID matching the PrintStream Inventory Code. This is the same as scenario 1 in the section How to Integrate a POD Item.

## Fulfillment - Dynamic Kits - Enhancement

Within DSF, the kit can be setup to allow the user to pick and choose which items will be part of the kit for the specific order they are entering. By placing a zero within the item quantity, this will tell DSF to not include the item as part of the kit. Once the order is submitted and passed into PrintStream, PrintStream will take what DSF provides and will also adjust the kit to match. Prior to the change, PrintStream would only use what was setup within it for the kit. The change does not affect the core operation of the kit within PrintStream and it will not allow the kit to be changed during order entry within it.

**Note: The kit within DSF & PrintStream must be setup with the same items. If PrintStream does not contain an item that DSF is trying to pass in as part of the kit, the order will fail.**



Below shows the order once it has been passed into PrintStream. As can be seen, the kit within the order only shows the 2 items provided by DSF.

BP730 Inc : Sales Order #: 360338\*\*\*Project: BP1105

**OPEN**

Sales Order Manage

Order Header

Cust Batch ID: PO #: Ship Profile: UPS Gr... Do Not Rel.: Source Code: Warehouse: Product Type:

Input Batch ID: 53784 MIS Job#: Ship Mode: U11 Ship Before Date: SO Origin: Commission Code: Order By: B P

Customer SO#: Monthly SO#: 0 Ship Timeline: Need Date: 4/7/20 Order Type: Nor... Cost Center: Order Notes: A

Commission:

N...	A...	Item #	Inv Code	Rev Code	Item Desc	Need Date	StatusID	UOM	Min Qty	Max Qty	Avail Qty	Qty On Ord	Gross Qty	Weight	Line Item Weight	Order Qty	Return Qty	Unit Price
K		66240	BP730 K...		test for BO...	4/7/2019	6	/T...	0	0	49723		5000	4.25	21250	5	0	0.154

Kit Details: test for BODtest for BODtest for BOD

Item #	Inventory Code	Item Description	Required Qty	Order Quantity	Quantity On Hand	Committed	Release Committed	Available Quantity
66246	BP FG BOD TE...	BP FG BOD Test11	1	5	49868	145	0	49723
66263	BP427 POD	BP427 POD	5	25	75	0	0	15

Available to Build 3

OK

Shipping Notes:

If the order was entered in PrintStream directly, the system will use all items linked to the kit, like below.

BP730 Inc : Sales Order #: 1000268128\*\*\*Project: BP1105

**CREATED**

Customer: BP730 Inc [BP730] Project: BP1105

Sales Order Manage

Order Header

Cust Batch ID: 53785 PO #: Ship Profile: UPS Gr... Do Not Rel.: Source Code: Warehouse: Product Type:

Input Batch ID: 53785 MIS Job#: Ship Mode: U11 Ship Before Date: SO Origin: Commission Code: Order By: B P

Customer SO#: Monthly SO#: Ship Timeline: Need Date: Order Type: Cost Center: Order Notes: A

Commission:

N...	A...	Item #	Inv Code	Rev Code	Item Desc	Need Date	StatusID	UOM	Min Qty	Max Qty	Avail Qty	Qty On Ord	Gross Qty	Weight	Line Item Weight	Order Qty	Return Qty	Unit Price
K		66240	BP730 K...		test for BO...		71	/T...	0	0	49723		4000	4.25	17000	4	0	0

Kit Details: test for BODtest for BODtest for BOD

Item #	Inventory Code	Item Description	Required Qty	Order Quantity	Quantity On Hand	Committed	Release Committed	Available Quantity
66246	BP FG BOD TE...	BP FG BOD Test11	1	0	49868	145	0	49723
66262	BP426 POD	BP426 POD	1	0	17	0	0	17
66263	BP427 POD	BP427 POD	25	0	75	0	0	3

Available to Build 3

OK

Shipping Notes:

## DSF PrintStream Integration Points

### Item Description Mapping

PrintStream has four item description fields which are transferred to DSF in a Catalog Update request.

These fields, including the Inventory Code, map to DSF as follows.

PrintStream	DSF
Inventory Code	Product Id
Inventory Description (1, 2, 3)	Product Name
Inventory Web Description	Display As
Item Nom Web Description	Long Description
Item Nom Alternate Description	Brief Description

### Inventory Description

PrintStream has three fields for description with a character length of 50, 40, and 40 characters. DSF only accepts the first 50 characters of the description so basically the first line of the description in PrintStream. The description in DSF must be unique from every other description there so you must make the description in the first 50 characters so that It will be unique in DSF.

The screenshot shows the 'Main Information' window in PrintStream. The 'Item Search' section displays 'Item #' as 128888 and 'Inv. Code' as SB-45789. The 'Account #' is 50910. The 'Inventory Description' tab is active, showing a 'Description' field with the text 'High Adventure Sleep Bag 23'. Below this, there are four checkboxes: 'DSF Shared' (checked), 'DSF Taxable', 'Combine in Carton', and 'Car'.

When the item is synced to DSF the description will appear here under “Product Name”. The “Display As” field will display the same description unless you setup a different description under the Web description in PrintStream. See Web Description on following pages.

**Progress**   **1** Information   **2** Product Complete

Information
Details
Settings
Pricing
Security

#### Product Information

Product Name:	<input type="text" value="High Adventure Sleep Bag 23"/>
Display As:	<input type="text" value="High Adventure Sleep Bag 23"/>
Product Id:	<input type="text" value="SB-45789"/>
Item Template:	<input type="text" value="SB-45789"/>
Description Footer:	<input type="text"/>
Direct Product Link:	<a href="/DSF/PRODUCTS/SKU/SB-45789.aspx">/DSF/PRODUCTS/SKU/SB-45789.aspx</a>
Type:	Non Printed Products

## Web Description

The Web Description in PrintStream will be pushed up to DSF as the Display As description

Main Information

NewSaveSearchEnter Init QtyView PictureChange Avg. PriceRefreshSettingCreate Revision

FileManageOptionHelp

Item Search

Item #128888Inv. CodeSB-45789Rev. Code

Account #50910Name | Robs

Main InformationRules /SettingsItem LinksExtra InformationPrinting SpecificationsCurrent QuantitiesFulfillment Settings

Extra Information

Item Header Code28828Item Header Id27879

Default PO Tolerance10Weight5

Replacement CodeMaster Number

Revision Date1/1/2010Bar Code Sequence

International TypeManager

Web DescriptionOur Warmest Bag EverCountry Of Origin

Free Defined Prefix/#/Suffix

Progress

1

Information

2

Product Complete

Information

Details

Settings

Pricing

Security

Product Information

Product Name:High Adventure Sleep Bag 23

Display As:Our Warmest Bag Ever

Product Id:SB-45789

Item Template:SB-45789

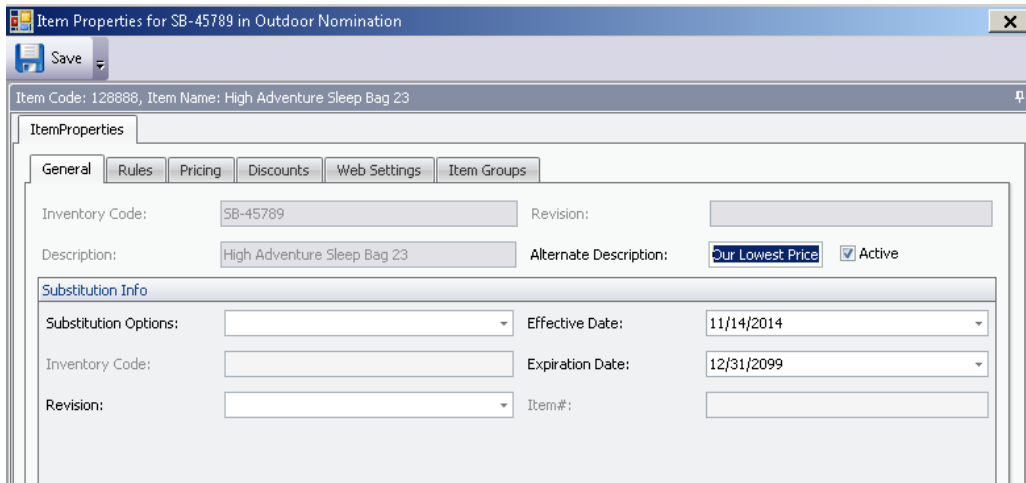
Description Footer:

Direct Product Link:/DSF/PRODUCTS/SKU/SB-45789.aspx

Type:Non Printed Products

## Alternate Description

Item Properties, under General > Alternate Description



Item Properties for SB-45789 in Outdoor Nomination

Save

Item Code: 128888, Item Name: High Adventure Sleep Bag 23

ItemProperties

General Rules Pricing Discounts Web Settings Item Groups

Inventory Code: SB-45789 Revision:

Description: High Adventure Sleep Bag 23 Alternate Description: **Our Lowest Price** ☒ Active

Substitution Info

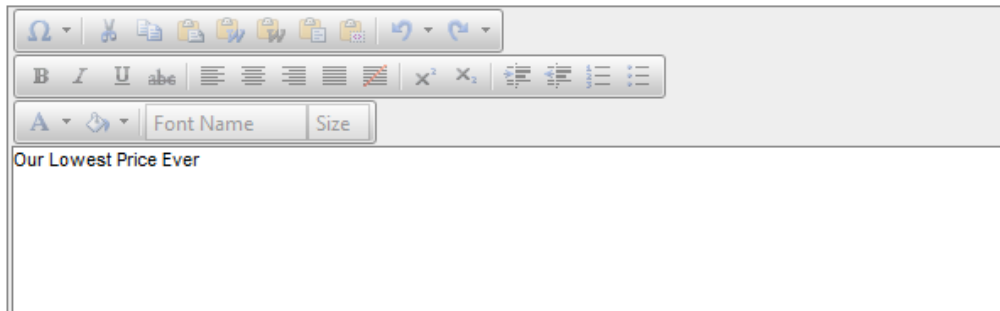
Substitution Options: Effective Date: 11/14/2014

Inventory Code: Expiration Date: 12/31/2099

Revision: Item#:

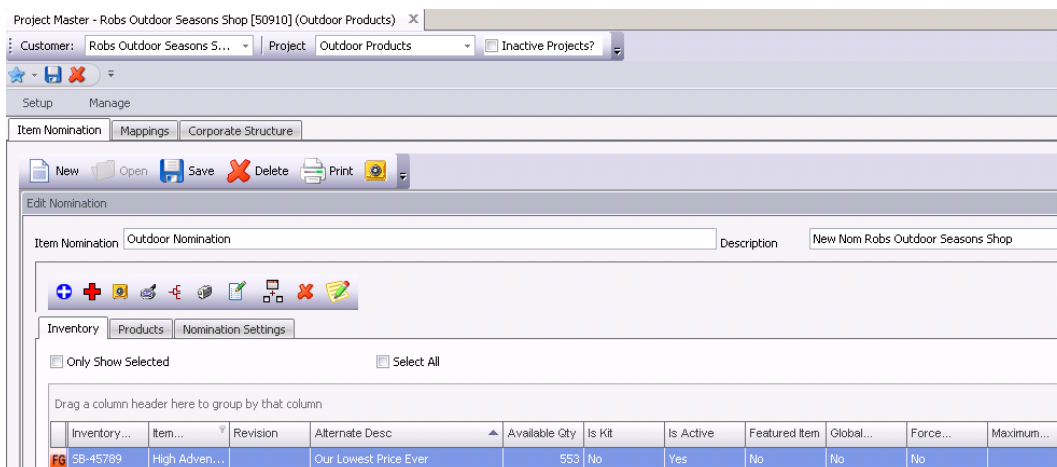
The Alternate Description shows under the Brief Description in DSF

### Brief Description



Our Lowest Price Ever

It is also shown under the nomination grid in the Alternate Description column



Project Master - Robs Outdoor Seasons Shop [50910] (Outdoor Products)

Customer: Robs Outdoor Seasons S... Project: Outdoor Products Inactive Projects?

Setup Manage

Item Nomination Mappings Corporate Structure

New Open Save Delete Print

Edit Nomination

Item Nomination: Outdoor Nomination Description: New Nom Robs Outdoor Seasons Shop

Inventory Products Nomination Settings

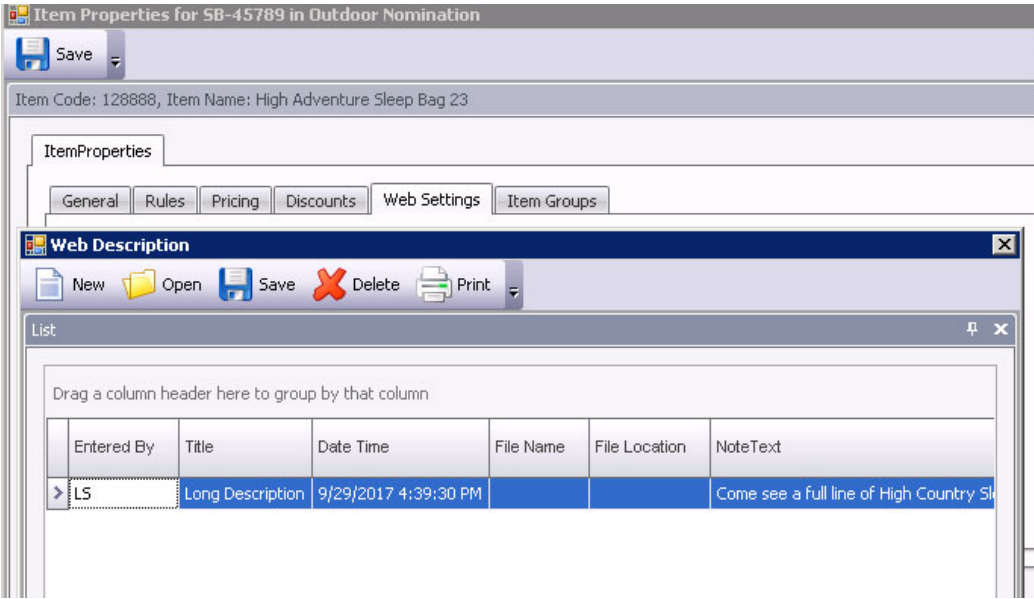
☐ Only Show Selected ☐ Select All

Drag a column header here to group by that column

Inventory...	Item...	Revision	Alternate Desc	Available Qty	Is Kit	Is Active	Featured Item	Global...	Force...	Maximum...
SB-45789	High Adven...		Our Lowest Price Ever	553	No	Yes	No	No	No	

## Web Long Description

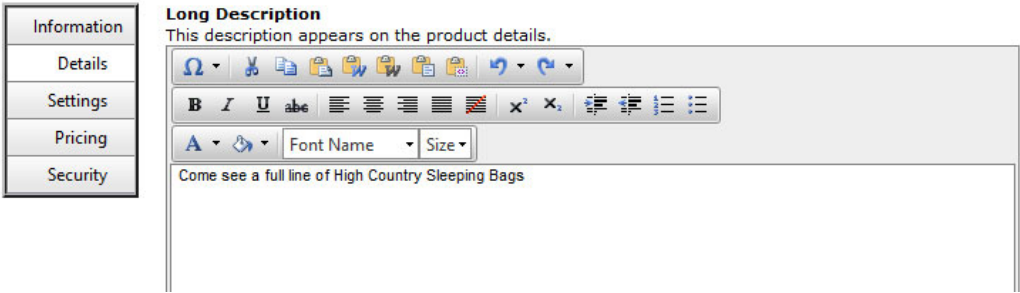
The Web Long Description is entered in under the Nomination > Item Properties > Web Settings > Web Description



The Web Long Description shows up as the Long Description in DSF

Progress

- 1 Information
- 2 Product Complete



**Note** If Web Description is blank, the Display As will be the same as Product Name.



## Order Settings - Setting Up Min/Max and Multiples of

DSF has this setting under the Product Settings area for each item where you can either select fixed quantities to order or setup a Min / Max order quantities and require that the user has to order based on Multiples of

**Order Quantities :**

☐ Any quantity  
☐ Fixed quantities  
☒ By Multiples  
☐ Allow buyer to edit quantity

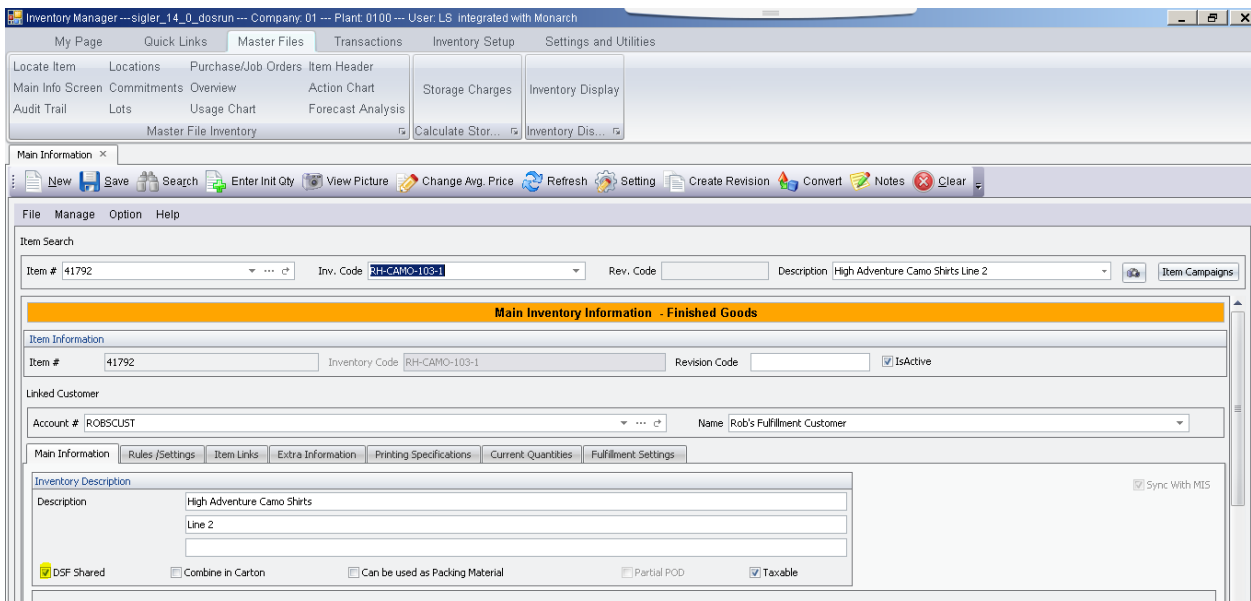
Minimum   
 Maximum   
 Multiple

☐ Advanced  
☐ Enforce Max Quantity Permitted In Cart  
 Multiple Recipients (SmartStores only)  
☒ Each recipient set to a valid quantity  
☐ Total quantity must add up to a valid quantity

This setting controls how the item can be ordered on the storefront

The screenshot shows a web storefront for 'OUTDOORS EQUIPMENT'. The page layout includes a sidebar on the left with navigation links such as 'Extended Apps', 'Campaign Dashboard', 'English (United States)', 'EFI PrintMessenger', and 'Windows (32bit)'. The main content area displays a grid of product listings. The products shown are 'Batch Postcard', 'High Adventure Sleeping Bag', 'Swoosh Business Card', and 'High Adventure Camo Shirts Line 2'. The 'High Adventure Sleeping Bag' listing has a red message stating 'This product is not available to order online at this time. Please contact the shop directly if you would like to purchase this'. A quantity dropdown menu is open for the 'High Adventure Camo Shirts Line 2' product, showing options from 0 to 25. The browser address bar shows the URL: https://ps-dsf-02/DSF/SmartStore.aspx?6xni2of2cf1y/6Epr9XDLLYqOKQMvqu/KJfpjyAT9i+mC6izAaiVOTamnmMPFd#!CategoryHome/28.

If the item is a POD item, then these settings must be done in DSF as PrintStream does not send updates to DSF for POD items. If the item is not a POD item and has this setting in the Inventory Master File “DSF Shared”.



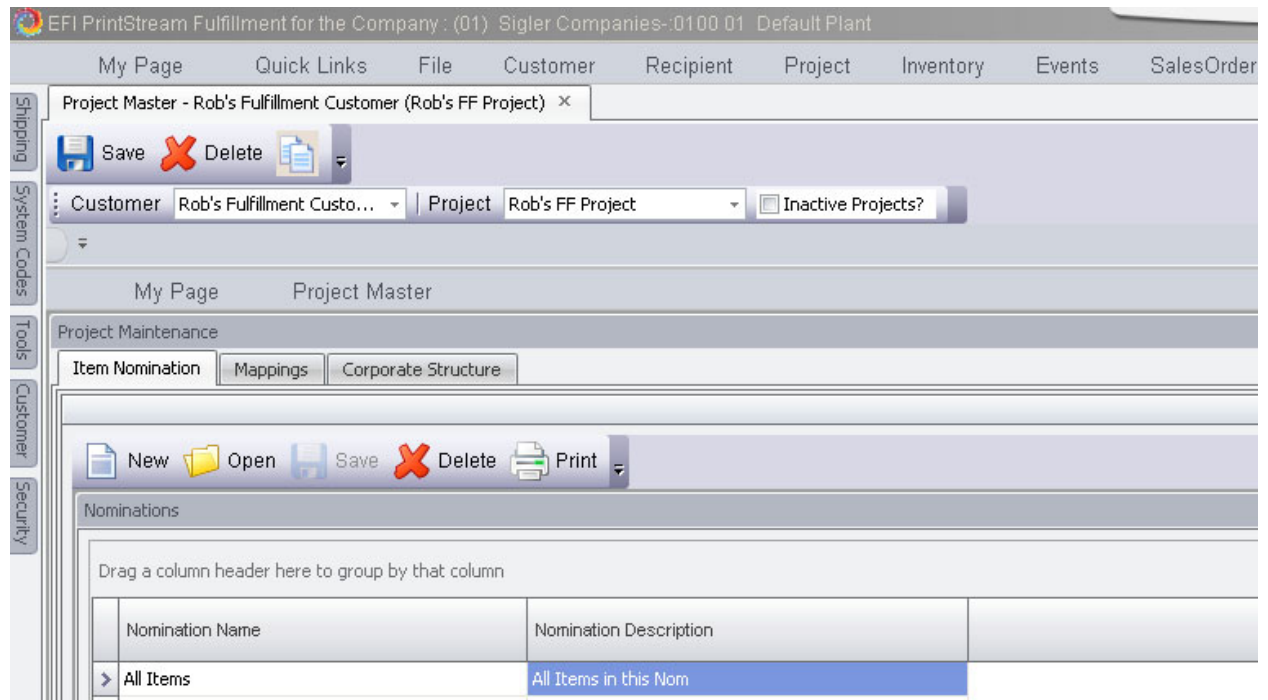
The Min Max and in multiples of setting needs to be setup in PrintStream and sent up to DSF.

**Caution if you set up these settings in DSF for a PrintStream DSF Shared Inventory item it will remove them from DSF each time a catalog update is sent up to DSF for this item, for this reason they should only be setup in PrintStream.**

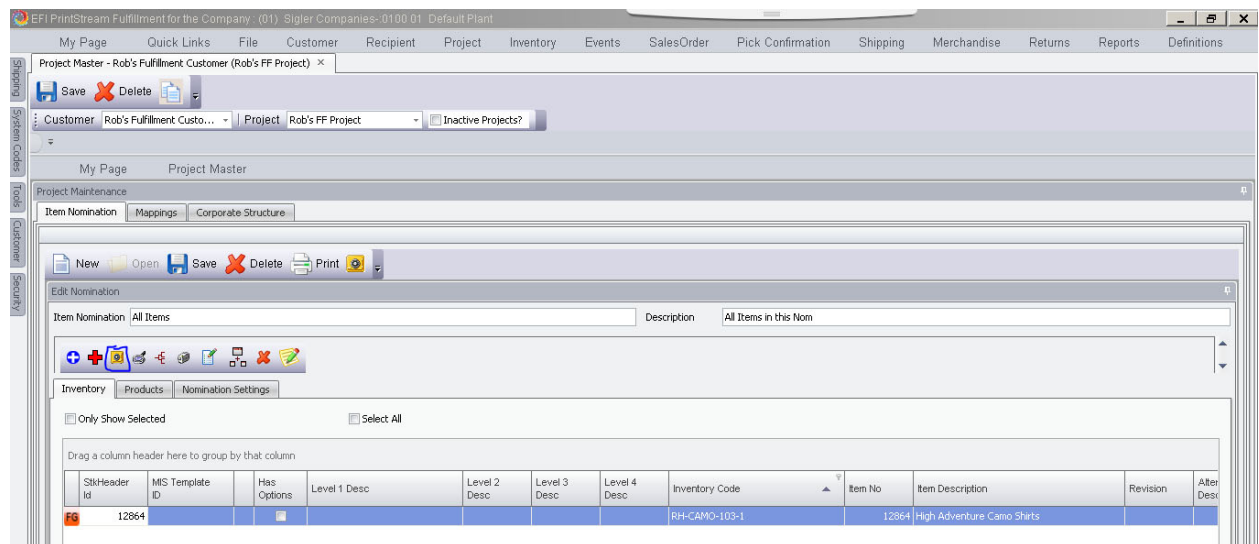
To apply these setting in PrintStream open up the Fulfillment Module and go to: Project > Project Maintenance. Select the customer and the project that has the inventory item where you want to set the min max and multiples for.



Click on Project Master and select Item Nomination



Open the nomination and locate the item that you want to add the setting to, then click on the item line so it is highlighted and then click on the Gold Safe icon on the tool bar here



When the item properties screen comes up click on the Rules Tab. Enter the Minimum, Maximum, and Order in Quantity here for the in multiples setting here and save the item property screen and the Nomination.

Item Properties for RH-CAMO-103-1 in All Items

Save

Item Code: 41792, Item Name: High Adventure Camo Shirts

ItemProperties

GeneralRulesPricingDiscountsWeb SettingsItem Groups

Start Date:

☐ Put On Hold

Item Expiration Date:

Minimum Limit

5

☒ Force Minimum

Maximum Limit (0=No Limit)

25

☒ Force Maximum

Order In Quantity

5

Back Order Rules

Use Project Setting

Shipper

Airborne

☐ Shipping Taxable

☐ Allow Serialization

Shipping Mode

A11

☐ MFI Receipt Serialization


Ship Mode Description

Airborne Express

☐ Allow Lot Tracking

Save in All Nomination

This will create a DSF Catalog Request in the EFI Integration program

 **EFIIntegration\_ReqReview**

Interface Requests

Load Requests Filtered

Load Request ID ->

Load Where Request XML Contains ->

GroupEntered FromToStatusReviews

Filters : 

DSFCatalog

3/3/2016

(all)

Double Click on a Request to Review or Set Reprocess

Set Multiple Requests to Re-Process

Drag a column header here to group by that column

	Group	Author	Seq. Critical	Resp. Req...	Entered	Processed
> +	DSFCatalog	PS	N	Y	3/3/2016 10:49 AM	

And if you then go to DSF> Administration > Products and locate the item then click on settings you will see these settings have been sent up to DSF and will appear on the item when you order it in the storefront.

<input type="checkbox"/>	Name ▲	Display As	Display Priority	ID #	Type	Job Ticket	Ticket Overrides	Price	Active	Auctioning Config. Status	Size	Mobile Supported	Modify Security	Define Rules
<input type="checkbox"/>	<a href="#">High Adventure Camo Shirts Line 2</a>	High Adventure Camo Shirts Line 2	Lowest	<a href="#">RH-CAMO-103-1</a>	Non Printed Products			Yes			<a href="#">30.627 Kb</a>			

Order Quantities :

☐ Any quantity  
☐ Fixed quantities  
☒ By Multiples  
☐ Allow buyer to edit quantity

Minimum   
 Maximum   
 Multiple

☐ Advanced  
☐ Enforce Max Quantity Permitted In Cart  
 Multiple Recipients (SmartStores only)  
☒ Each recipient set to a valid quantity  
☐ Total quantity must add up to a valid quantity

## Quantity

In order for the quantity to show up for the item on the store front you have to have the back order rule on the project that allows for back orders. If your rule does not allow back orders it will not display quantity on the storefront

Project Master - Robs Outdoor Seasons Shop [50910] (Outdoor Products) X

Customer: Robs Outdoor Seasons S... Project: Outdoor Products ☐ Inactive Projects?

Setup Manage

Project Basics | Jobs | Nomination Events | Sales Order | Inventory Shipping | Merchandise | Credit Card | Invoice Parameters | One time Charge Setup | Variable Information | Web Settings | Other Settings | OutPut | POD

Sales Order Preferences | Sales Order Charges | Item Entry Grid Layout

☐ Require Customer Batch ID  
☐ Allow Separate Ship To Address  
☐ Show System Shipping Profiles  
☒ Delete Orders in Created Status  
☐ Pack At Production

☐ Require Customer Order Number  
☐ Allow Ship To at Line Items

Auto-Release Options

Do not Auto-Release

Source Code

Back Order Preference

Back Order-Ship Partial

CSR Sales Order Note

Having this setting automatically sets this setting under Products > Details in DSF to Allow for Backorder

Manage Inventory : ☒ Enabled

Inventory


☒ Allow Back Order

☒ Show Inventory when back order is allowed

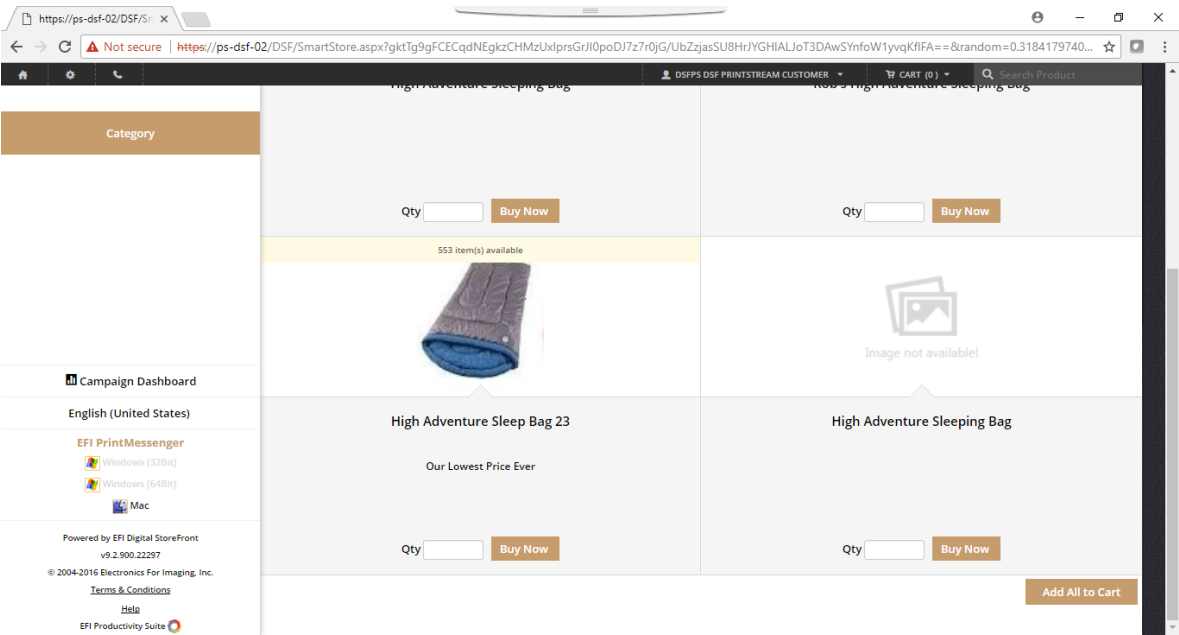
Replenish inventory:

☐ Add  to existing inventory

☐ Reset inventory to

 It is assumed that all pending orders for this product will be shipped without consuming this inventory.

If you want DSF to display the quantity for the item on the storefront you must also check the option for “Show Inventory when back order is allowed”. This option has to be set in DSF.



## Start and End Date for Product

You can set the beginning date and also the end date for the product in PrintStream and it will populate these fields in DSF. If you highlight a specific item under the Project Nomination and select the Item Properties for that item you will see under the Rules tab that there is a Start Date and Item Expiration Date field where you can click and set a date for each.

When the dates are set and the properties for this item are saved it will trigger an XML to DSF and populate the Dates in DSF under Product Settings

**Progress** 1 **Information** 2 **Product Complete**

Information
Details
Settings
Pricing
Security

### Settings

Display Priority : **High**

---

Valid Dates : Creation Date: Friday, December 2, 2016

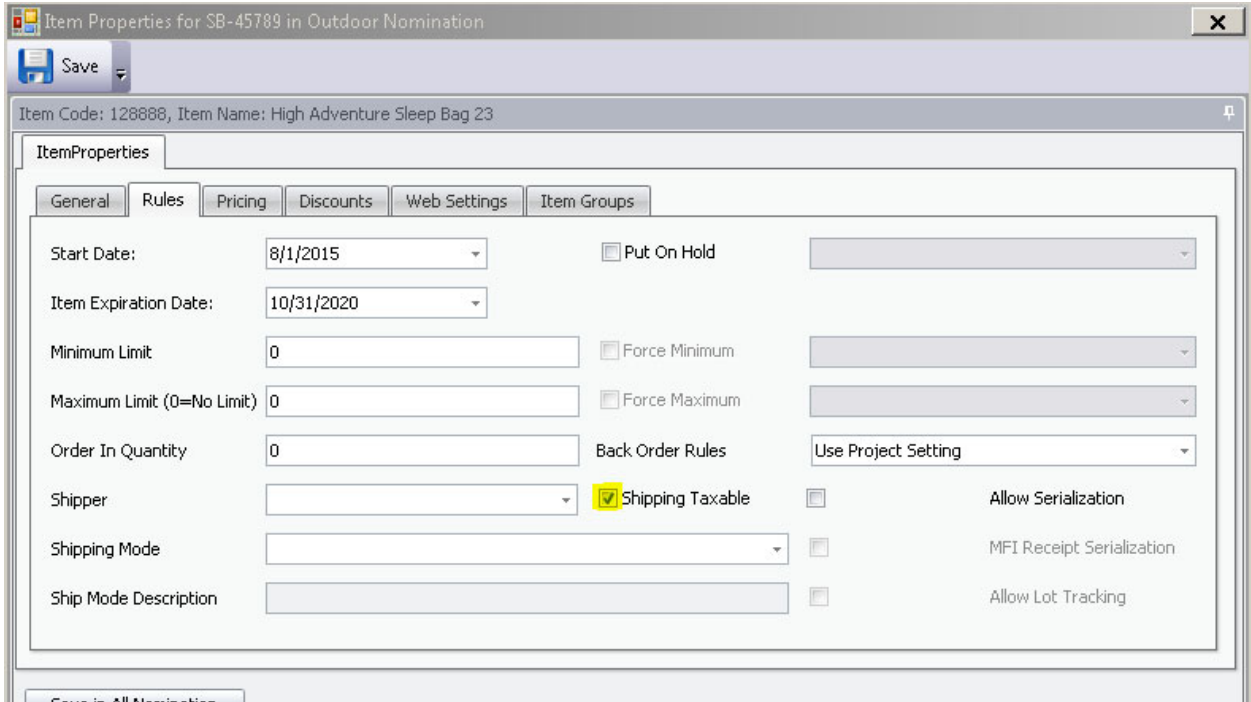
Active: ☐ No ☒ Yes

Start Date: 8/1/2015

End Date: ☐ Never ☒ 10/31/2020

## Shipping Charges

The default shipping setting for items pushed up from PrintStream to DSF is Exempt Shipping Charges. If you want shipping charges to be calculated for the item in DSF you need check this checkbox under the Nomination Item Properties, rules, Shipping Taxable.



Item Properties for SB-45789 in Outdoor Nomination

Save

Item Code: 128888, Item Name: High Adventure Sleep Bag 23

ItemProperties

General Rules Pricing Discounts Web Settings Item Groups

Start Date: 8/1/2015 Put On Hold

Item Expiration Date: 10/31/2020

Minimum Limit: 0 Force Minimum

Maximum Limit (0=No Limit): 0 Force Maximum

Order In Quantity: 0 Back Order Rules: Use Project Setting

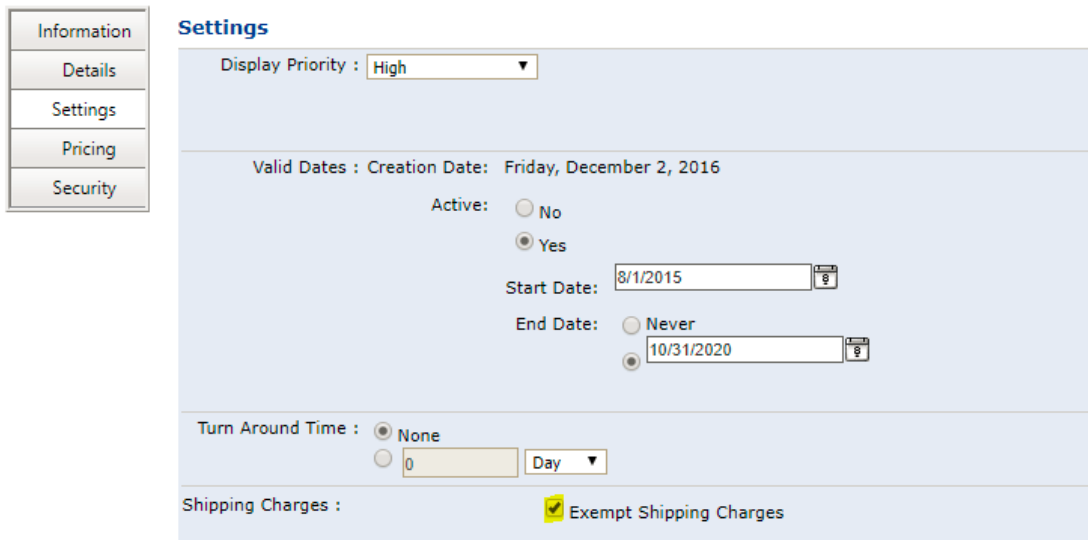
Shipper: Shipping Taxable

Shipping Mode: Allow Serialization

Ship Mode Description: MFI Receipt Serialization

Allow Lot Tracking

When the item properties are saved it sends the XML up to DSF and checks this checkbox on the product



Information Details Settings Pricing Security

Settings

Display Priority: High

Valid Dates : Creation Date: Friday, December 2, 2016

Active: No Yes

Start Date: 8/1/2015

End Date: Never 10/31/2020

Turn Around Time : None 0 Day

Shipping Charges : Exempt Shipping Charges



## Pricing

DSF and PrintStream support the following Pricing guidelines:

Nomination View Edit Item Properties

Item Properties for EFIBENPKT-V8 in All Nelsen Items

Item Code: 4614, Item Name: Benefit Orientation Packet

ItemProperties

General Rules Pricing Discounts Web Settings Item Groups Print Templates Auto Added Items

Item Price: 0.0000

Package Pricing: 0.0000

Nomination Price: 0.0000

Tiered Pricing:

Zero Price For Invoice

**Item** – For Customer Owned and Finished Goods inventory items if the Pricing in View Edit Properties is set to Item. It will use the Sell Method set for Standard Sell Price in Master Files Inventory > Main Info Screen

Inventory Manager ---sup\_pace --- Company: 01 --- Plant: 0100 --- User: LS integrated with Pace

My Page Quick Links Master Files Transactions Inventory Setup Settings and Utilities

Main Information

Item # 4614 Inv. Code EFIBENPKT-V8 Rev. Code Description Benefit Orientation Packet

Account # NEL123 Name Nelsen Fulfillment Orders Service

Main Information Rules/Settings Item Links Extra Information Printing Specifications Current Quantities Fulfillment Settings

Inventory Description

Description Benefit Orientation Packet

DSF Shared DSF Taxable Combine in Carton Can be used as Packing Material Partial POD

Inventory Details

Unit Of Measure Pack of 500 Unit Conversion 500

Expiry Date 1/1/2099 Created Date 10/31/2013

Layout Across 0 Layout Around 0 Number Up 1

Pricing

Sell Method Standard Price 17.0000

Costing Method Average Cost

Declared Value Fixed Value 0

Unit Of Cost Description Each

Unit Of Cost 1 Average Cost 0.0000

**Nomination Price** – If the inventory item is shared in several nominations and you want to have a different price for the same item in each nomination that it appears in, you can select the pricing method and then key in the price for this nomination. This setting overrides any pricing setup for the item in the Inventory Master File.

**Tiered Pricing** - Tiered pricing allows you to setup pricing breaks based on quantities ordered. To create tiered pricing, select this option and the right click in the white space on the right. Select the option for “New Pricing” and it will add a pricing row to the grid. When you have finished adding all the pricing options, right click and select “Save Pricing”

Item Properties for 20UPSIDEDOWN in All Nelsen Items

Save

Item Code: 20270, Item Name: 20oz Upside Down

ItemProperties

General Rules Pricing Discounts Web Settings Item Groups Print Templates Auto Added Items

☐ Item Price: 0.0000

☐ Package Pricing: 0.0000

☐ Nomination Price: 2.0000

☒ Tiered Pricing:

☐ Zero Price For Invoice

From	To	Price	
>	0	10	2
	11	25	1.75
	26	50	1.5
	51	9999999	1.25

For items using tiered pricing, we have made changes to the DSF Catalog XM when triggered during an update or a sync to DSF. Package and tiered pricing will now be sent to DSF for each customer and sub-customer. This will allow each sub customer in DSF to use the tier pricing for each of their respective recipients/ DSF user. Prior to the change, only the user linked to the main customer could use the tier pricing for an item.

For every elevated recipient under the main fulfillment customer and for every sub customer who is linked as a DSF customer, the DSF Catalog XML will send the item's pricing under each of the elevated recipient/ customer ids. In the XML below it shows pricing for sub customer (NelJJ) John Johnson

```
erpCustomerID="NELJJ"
backOrderAllowed="true"><fom:QuantityPriceBreak
minQuantity="0" unitPrice="2" /><fom:QuantityPriceBreak
minQuantity="11" unitPrice="1.75"
/><fom:QuantityPriceBreak minQuantity="26" unitPrice="1.5"
/><fom:QuantityPriceBreak minQuantity="51"
unitPrice="1.25"
```

As well as Pricing for the Parent Customer which is (NEL123) Nelsen Fulfillment Orders Service

```
all erpCustomerID="NEL123"
backOrderAllowed="true"><fom:QuantityPriceBreak
minQuantity="0" unitPrice="2" /><fom:QuantityPriceBreak
minQuantity="11" unitPrice="1.75"
/><fom:QuantityPriceBreak minQuantity="26" unitPrice="1.5"
/><fom:QuantityPriceBreak minQuantity="51"
unitPrice="1.25"
```

Within DSF, the user would go into “Companies” and locate the customer. Once in the customer screen, the pricing for the item can be found under the “**Exemption to the Base Pricesheet**”. Click on the icon to access the price sheet.

**Edit Company**

ps-dsf/DSF/Admin/MD/base.aspx#/manage-companies/edit

**Burt's Beverage (765829)**

Handling Charges:  Use Print Shop Setting

Display Handling Charges:  Use Print Shop Setting

Checkout Method:  Standard

Display Turnaround Time:  Use Print Shop Setting

Calendar Date:  Use Print Shop Setting

Always Show Promo Code: ☐

Do Not Show Print Shop To Buyer: ☐

For Reorder Use Latest/Current Ticket Template (latest may have changes from original): ☐

Estimated Pricing Policy: ☐

**PRICE SHEETS**

Base Price Sheet:  Sample Price

Show Inventory To Buyer: ☐

Show Pricing To Buyer: ☒

Exemptions to the Base Pricesheet: 1

Show Pricing To Approvers: ☒

Markup or Markdown Prices: ☐

Disable Rush Fee for this Company: ☐

Unit Price Visibility:  Use Print Shop Setting

Allow Tax Exemption: ☐

**Pricing**

ps-dsf/DSF/Admin/PricingToWeb/PriceSheetSummary.aspx?ckhXuC8g59e4...

**efi MarketDirect StoreFront**

Home [Cart \(0\)](#) [My Account](#) [Order Status](#) [Print Shops](#) [Contact Us](#)

Welcome! [Logout](#)

Storefront Administration [Operator View](#) [Go](#)

**Burt's Beverage (765829)** [Edit](#) [Print this page](#) [Done](#)

View By:  Products

View Item:  View All

2nd finished goods item owned by Company (Product Price)	-	-	-	-	-
Bing-Item1 Bing-Item1 (Postage Cost)	-	-	-	-	-
Bing-Item1 Bing-Item1 (Product Price)	-	-	-	-	-
BP057-1 BP057-1 (Postage Cost)	-	-	-	-	-
BP057-1 BP057-1 (Product Price)	1 - 10	\$2.75	\$0.00	-	-
BP057-1 BP057-1 (Product Price)	11 - 20	\$2.27	\$0.00	-	-
BP057-1 BP057-1 (Product Price)	21 or more	\$2.08	\$0.00	-	-

28 Item(s)

[Rental](#) [Edit](#)

Once the user is setup to log into the website, the pricing for the item will be the tier pricing.

BP057-1 BP057-1

Image not available!

Item No.: BP057-1

Qty

Quantity	Quantity Pricing
1 - 10	\$2.75
11 - 20	\$2.27
21 or more	\$2.08

Continue Shopping

Buy Now

During the checkout process, the proper tier price associated to the quantity for the order will appear on all DSF screens.

HOMEADMINISTRATIONCAMPAIGN DASHBOARDCONTACT USHELPENGLISH (UNITED STATES)BURT SMITH

Search Product

🔍

🛒 (1)

CART

Due Date 

WED June 23 2021 16:00

Selected Print Shop 

Face

Products	Quantity	Order Unit	Unit Price	Total
<div><div>BP057-1 BP057-1</div><div>Item Name: BP057-1 BP057-1</div><div><div>Save for later</div><div>Remove</div></div></div>	<div>11</div>	Each	\$2.27	\$25.00

Subtotal:

\$25.00

Taxes:

\$0.00

Total:

\$28.00

Price subject to change.

Proceed to checkout to view final order total, including taxes, fees, shipping.

CONTINUE SHOPPING

CLEAR CART

PROCEED TO CHECKOUT

## Sort Key

When items are added to a nomination they are assigned a sort key under the Web Settings on the item properties. The default setting is 99999 which in Priority for DSF is equal to Lowest. If the sort key is set to "0" it will default to Standard Priority. All other priorities are setup by rank 1 equals the highest and 99999 is the lowest and there are other priorities between.

Item Properties for ROFLSHT in Outdoor Nomination

Save

Item Code: 452967, Item Name: All Season Flashlight

ItemProperties

General Rules Pricing Discounts Web Settings Item Groups

☒ Show on Web

☐ Use "Not Available" Message

Featured Item: Not a Featured Item

Sort Key: 99999

Web Description...

You can update these values by doing an import and export of the Nomination changing the Sort Key Value and then re-importing

Item Nomination Import

Item Nom Import Batch Import

Select Excel File: Browse...

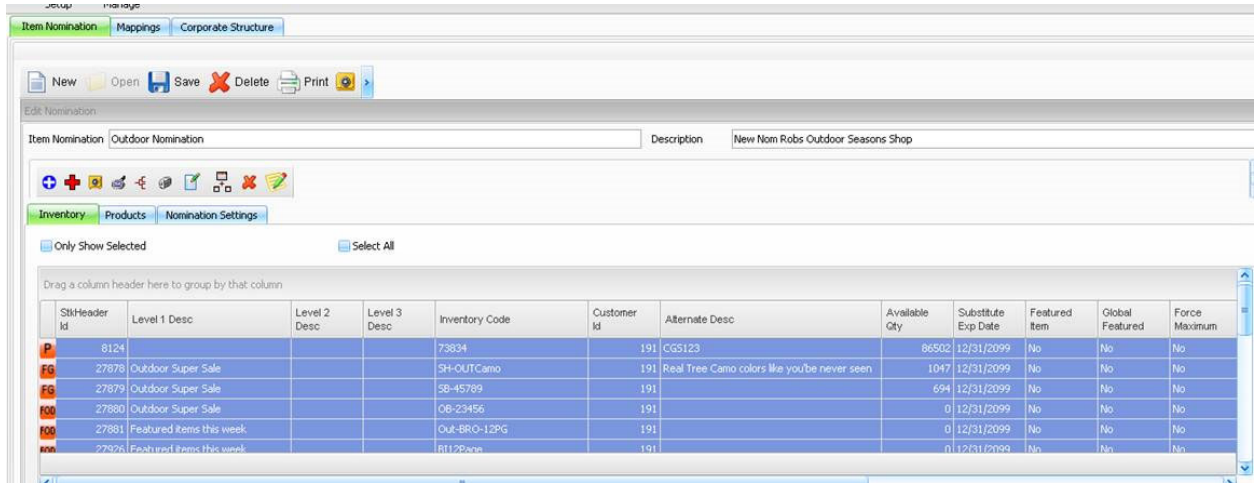
Customer: Robs Outdoor Seasons Shop Import

Excel Fields Generate Excel File

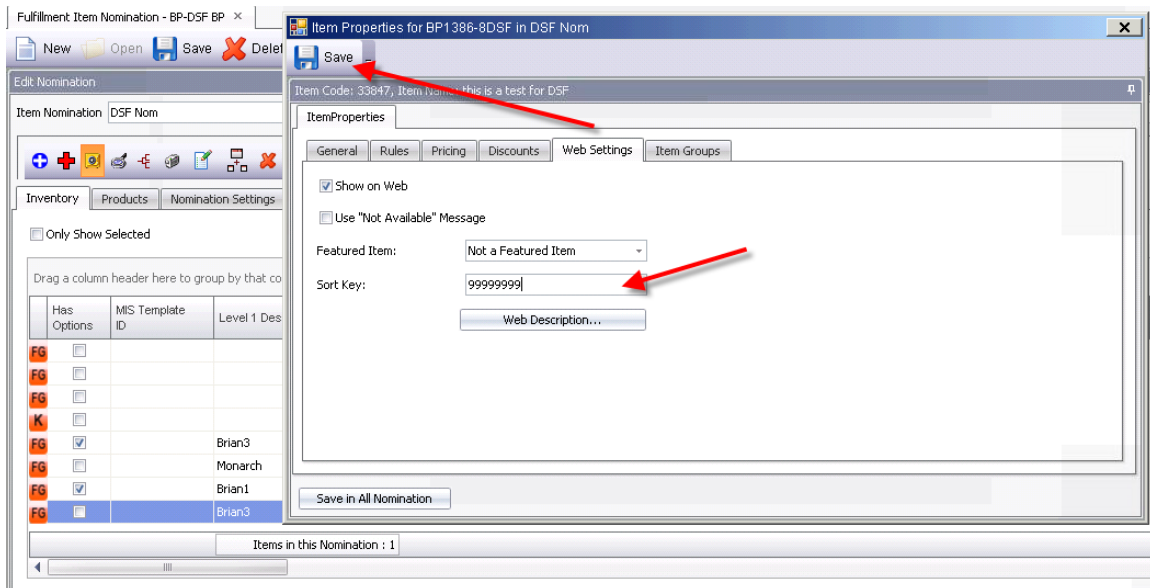
Select Nomination: Outdoor Nomination Load Data Export Data

NomName	NomDescription	ItemNumber	InventoryCode	ShowOnWeb	FeatureItem	SortKey	WebNotes
Outdoor No...	New Nom Robs O...	462532	JBK1234		NO	99999	
Outdoor No...	New Nom Robs O...	463434	DRITABLET		NO	99999	
Outdoor No...	New Nom Robs O...	464318	T-Shirt-Wick		NO	99990	
Outdoor No...	New Nom Robs O...	464372	12900		NO	99999	
Outdoor No...	New Nom Robs O...	764257	Rob DSF S...		NO	99999	

If you do update the values using an import after you do the import you must highlight all the items in the nomination and do a save on the item properties to send a DSF CatalogXML update to DSF and update the priority ranking in DSF.



If the sort key is increased for any item passed its previous max and the change is saved, the XML that is generated will contain an update for every item in the nomination.



In the below screen shot, all the nomination items are included in one XML because the sort key max range was changed.

The screenshot shows the 'Interface Requests' window. At the top, there are filters for Group (DSFCatalog), Entered From (10/30/2015), To, Status ((all)), and Reviewed. Below the filters is a table with columns: Group, Author, Seq. Critical, Resp. Req..., Entered, Processed, Sta..., So..., Tra..., Request ID, and Reviewed. Two requests are listed: one with Request ID 41150 and another with Request ID 41152. Below the table, a status bar shows 'Request ID : 41152, Trans Number : 41152, Group : DSFCatalog, Status : U, Source : P, Entered : 10/30/2015 11:24:51 AM, Author : PS'. Below the status bar are buttons for 'Set to Re-Process', 'Set as Reviewed', 'Full Response', 'Successes Only', 'Errors Only', and 'Email Support...'. Below these buttons are three text areas: 'Request XML', 'Response XML', and 'Request History'. The 'Request XML' area contains a large XML document. The 'Response XML' area contains a smaller XML document. The 'Request History' area contains a log entry: '[10/30/2015 11:24:51 AM] Response Received, status set to:U'. A red arrow points from the 'Response XML' area to the 'Request XML' area.

Interface Requests

Load Requests Filtered | Load Request ID -> | Load Where Request XML Contains -> | Fit Columns | 2 requests selected

Filters : Group: DSFCatalog Entered From: 10/30/2015 To: Status: (all) Reviewed:

Double Click on a Request to Review or Set Reprocess Set Multiple Requests to Re-Process

Drag a column header here to group by that column

Group	Author	Seq. Critical	Resp. Req...	Entered	Processed	Sta...	So...	Tra...	Request ID	Reviewed
DSFCatalog	PS	N	Y	10/30/2015 11:14 AM	10/30/2015 8:15 AM	S	P		41150	N
DSFCatalog	PS	N	Y	10/30/2015 11:24 AM		U	P		41152	N

Request ID : 41152, Trans Number : 41152, Group : DSFCatalog, Status : U, Source : P, Entered : 10/30/2015 11:24:51 AM, Author : PS

Set to Re-Process Set as Reviewed Full Response Successes Only Errors Only Successes : 1, Errors : 0 Email Support...

Request XML Find: Response XML Find: Request History

Request XML: <?xml version="1.0" encoding="utf-8"?><fom:CatalogUpdateRequest xmlns:fom="com.efi.fom" Schemalocation="http://enetwork.printcafe.com:80/dtd/fom/fom.xsd" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" routingIdentifier="SiglerCo" deviceId="6abb613-77ec-491b-a666-64c3602fb970" disableAll="false"><fom:ProductListItem price="4.25" productCode="BP-DSF1386" product="DSF 1386 Item " weight="0" UnitsOfMeasurementWeight="oz" descr="ALT DESC" fullDescr="" displayAs="32507 Web Description July" avail="6899" forSale="true" reorderLevel="0" action="update" unitName="" unitCount="0" maxOrderAmount="0" incrementByAmount="0" freeShipping="true" freeTax="true"><fom:ProductCustomerDetail erpCustomerID="3379" backOrderAllowed="true"><fom:QuantityPriceBreak minQuantity="1" unitPrice="4.25" /></fom:ProductCustomerDetail><fom:ProductRank minRank="1" maxRank="99999999"><fom:ProductCategory action="delete" categoryName="Storefront" dsfCategoryId="1"><fom:ProductCategory><fom:ProductCategory action="delete" categoryName="Test2" dsfCategoryId="1"><fom:ProductCategory><fom:ProductCategory action="delete" categoryName="Test3" dsfCategoryId="1"></fom:ProductCategory></fom:ProductC

Response XML: <pst:PrintStreamResponse xmlns:pst="printstream:efi:com" Status="U"><pst:Success Message="Success"/></pst:PrintStreamResponse>

Request History: [10/30/2015 11:24:51 AM] Response Received, status set to:U

## Shipping Updates

When shipping multiple packages from PrintStream, in order to know which items are in which packages, you must use Pick Confirmation.

Once a shipment is processed in PrintStream, an Order Status Update request is sent to DSF, containing the shipping information – all the packages and the items within the packages.

Using this order as an example, we have two items. The Sleeping Bag has a quantity of 1, while there are 2 Camo Shirts.

Products		
High Adventure Sleep Bag		
Qty	Unit Price	Total
1	\$25.00	\$25.00
-----		
Outdoor Camo Shirts Large		
Qty	Unit Price	Total
2	\$15.00	\$30.00

Using **Pick Confirmation**, we place the Sleeping Bag and one of the shirts in the first package. The second shirt goes into the second package. In DSF, the Shipping Details look like this.

SHIPMENT DETAILS				
Partial Shipment 1	ERP Shipping ID 114071-64526		9/30/2014 7:41:14 AM	
Products	Qty Ordered	Qty Shipped	Shipping Carrier	Tracking Number
Warmest Sleeping Bag	1	1	UPS GROUND	<a href="#">z111</a>
Partial Shipment 2	ERP Shipping ID 114071-64526		9/30/2014 7:41:14 AM	
Products	Qty Ordered	Qty Shipped	Shipping Carrier	Tracking Number
Web description for Camo Shirt	2	1	UPS GROUND	<a href="#">z111</a>
Partial Shipment 3	ERP Shipping ID 114071-64527		9/30/2014 7:41:14 AM	
Products	Qty Ordered	Qty Shipped	Shipping Carrier	Tracking Number
Web description for Camo Shirt	2	1	UPS GROUND	<a href="#">z2222</a>



For the Camo Shirt, you can see the Qty Ordered of 2, with Qty Shipped of 1 for the first package (Tracking Number z111), and the same for the second package (Tracking Number z2222).

If Pick Confirmation is not used, for the same order, the DSF Shipping Details would look like this.

Since we don't know which item is in which package, we show the total Qty Shipped in the first package (Tracking Number z33333), while subsequent packages will show Qty Shipped as zero (0).

SHIPMENT DETAILS				
Partial Shipment 1	ERP Shipping ID 114067-64517		9/29/2014 8:49:22 AM	
Products	Qty Ordered	Qty Shipped	Shipping Carrier	Tracking Number
Warmest Sleeping Bag	1	1	UPS GROUND	<a href="#">z33333</a>
Partial Shipment 2	ERP Shipping ID 114067-64518		9/29/2014 8:49:22 AM	
Products	Qty Ordered	Qty Shipped	Shipping Carrier	Tracking Number
Warmest Sleeping Bag	1	0	UPS GROUND	<a href="#">z4444</a>
Partial Shipment 3	ERP Shipping ID 114067-64517		9/29/2014 8:49:22 AM	
Products	Qty Ordered	Qty Shipped	Shipping Carrier	Tracking Number
Web description for Camo Shirt	2	2	UPS GROUND	<a href="#">z33333</a>
Partial Shipment 4	ERP Shipping ID 114067-64518		9/29/2014 8:49:22 AM	
Products	Qty Ordered	Qty Shipped	Shipping Carrier	Tracking Number
Web description for Camo Shirt	2	0	UPS GROUND	<a href="#">z4444</a>

## Cancel or Edit Orders from DSF

### To edit an order in DSF

1. Log in as **Administrator** and proceed to the Order View screen.

**Note** If the order is In Production in DSF, this means the order is released in PrintStream. You may not edit an order that has been released in PrintStream.

2. Click the **Quote** value to enter the order edit screen.

**Order View: Printstream Generic**

**Print Shop:** Printstream Generic

**View:** Order

**Sort by:** Order Number

	313054 Rob Johnson	Status: User Approved
	Due: 10/9/2014 11:30 AM	Quote: <b>\$33.75</b>

3. You may change the **Quantity** for any line item, including setting to 0 (to cancel).

**This order has already been quoted and approved by the buyer.**

**Summary For Order 313054**

<b>Ordered By:</b> Rob Johnson Rob's Outdoor Seasons Shop 220 Highland Drive SANTAQUIN, UT 84655 United States 222-456-1234	<b>Company:</b> Rob's Outdoor Seasons Shop	<b>Price Sheet(s):</b> Rob's Outdoor Seasons Shop MIS GenMulti01 PriceSheet DSF 3.0 Sample Pricing
---	---	---

This order has been submitted to MIS 'Printstream Generic Multi'.  
Last successful MIS Update: 10/9/2014 8:15:15 AM

	Type	Description	Taxable	Quantity	Unit Price	Price
<a href="#">Edit</a>	Non Printed Products	High Adventure Sleep Bag		1	25.00	25.00
<a href="#">Edit</a>	Non Printed Products	Outdoor Camo Shirts Large		0	0.00	0.00
<a href="#">Edit</a>	Handling		<input type="checkbox"/>			0.00
<a href="#">Edit</a>	Shipping	003-UPS Ground (Rob Johnson)	<input type="checkbox"/>			5.00

**Tax:** Tax Exempt

Subtotal: \$25.00  
Taxes: \$3.75  
**Total: \$33.75**

**Item Details High Adventure Sleep Bag**

Description	Unit	Taxable	Units Per Item	Units Charged	Price Per Unit	Component Price
Prepriced: High Adventure Sleep Bag	Copy	<input checked="" type="checkbox"/>	1	1	25.0000	25.00

4. When you click **Save Changes**, the order update will be sent to PrintStream.

**To cancel the entire order from DSF**


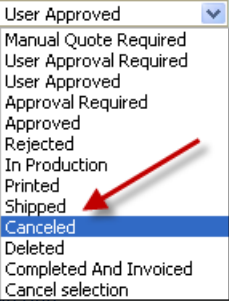


1. On the Order View screen, click the **Status** link to expose the **Status** drop-down.
2. Click **Canceled** (and nothing else).

This will automatically begin cancelling the order in DSF and will send an **Order Cancel** to PrintStream.

**Order View: Printstream Generic**

**Print Shop:** Printstream Generic

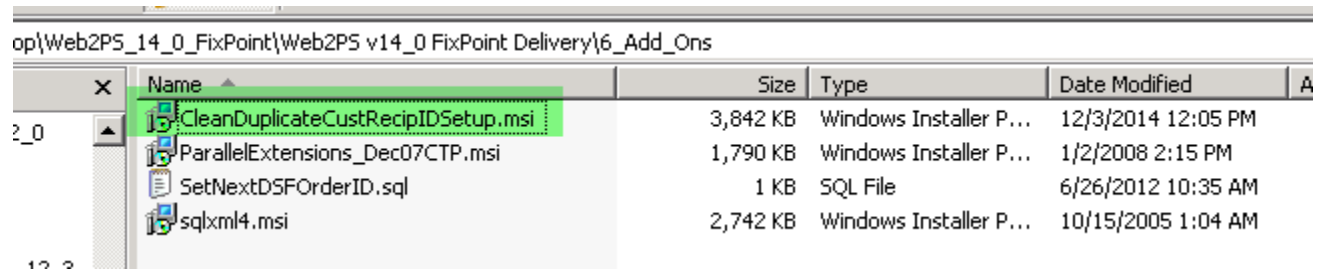
**View:** Order **Sort by:** Order Number

 <a href="#">313054</a> Rob Johnson <b>Due:</b> 10/9/2014 11:30 AM	Status: 
 <a href="#">313053</a> Rob Johnson <b>Due:</b> 10/9/2014 10:30 AM	Status:
 <a href="#">313050</a> Rob Johnson <b>Due:</b> 10/8/2014 1:30 PM	Status:

The image shows a screenshot of the 'Order View' screen for 'Printstream Generic'. It displays a list of orders. The first order, 313054, is highlighted in light blue. A red arrow points to the 'Status' link for this order, which has opened a dropdown menu. Another red arrow points to the 'Canceled' option in the dropdown menu. The dropdown menu includes options like 'User Approved', 'Manual Quote Required', 'User Approval Required', 'Approval Required', 'Approved', 'Rejected', 'In Production', 'Printed', 'Shipped', 'Canceled', 'Deleted', 'Completed And Invoiced', and 'Cancel selection'.

## Duplicate Customer Recipient Utility

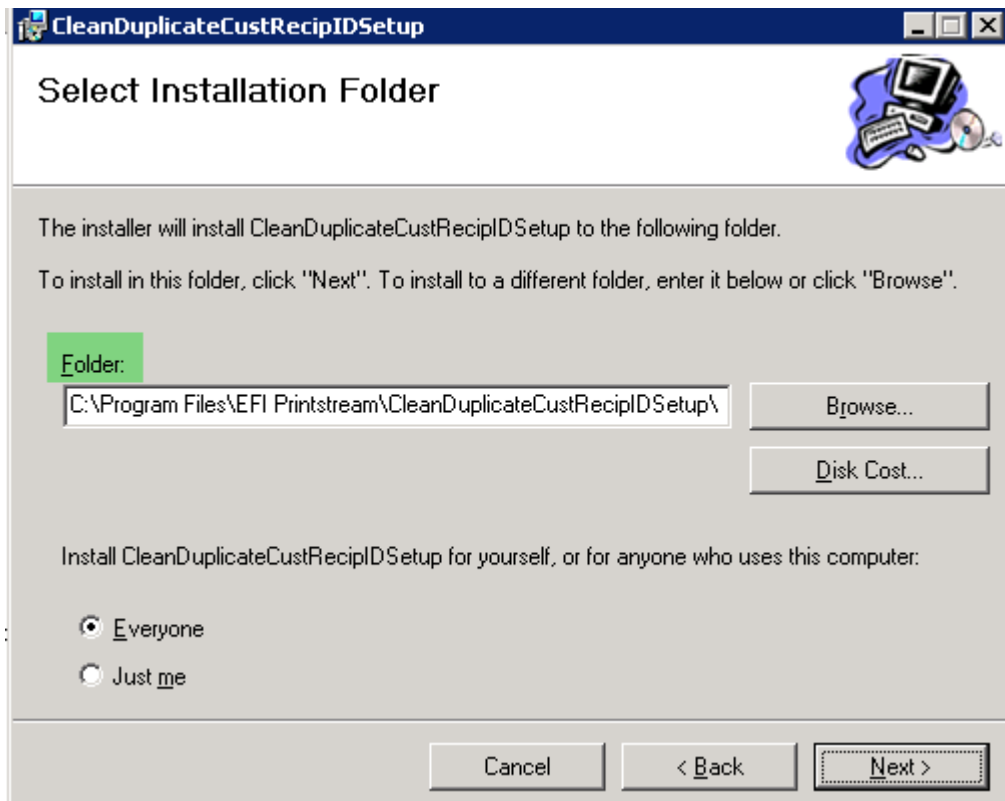
This utility may be found in the Winexe folder. If the utility is not present, then you can install it from the Web2ps Delivery Package. Under the folder **6\_Add\_Ons**, you will find an installer called **CleanDuplicateCustRecipIDSetup**.



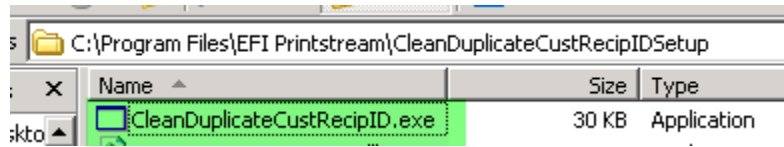
Name	Size	Type	Date Modified
CleanDuplicateCustRecipIDSetup.msi	3,842 KB	Windows Installer P...	12/3/2014 12:05 PM
ParallelExtensions_Dec07CTP.msi	1,790 KB	Windows Installer P...	1/2/2008 2:15 PM
SetNextDSFOrderID.sql	1 KB	SQL File	6/26/2012 10:35 AM
sqlxml4.msi	2,742 KB	Windows Installer P...	10/15/2005 1:04 AM

Copy the msi to your server and double-click to run the install package.

Keep the default folder or select another. Click **Next** to complete the installation.



Proceed to the Winexe or installation folder and run the executable file.

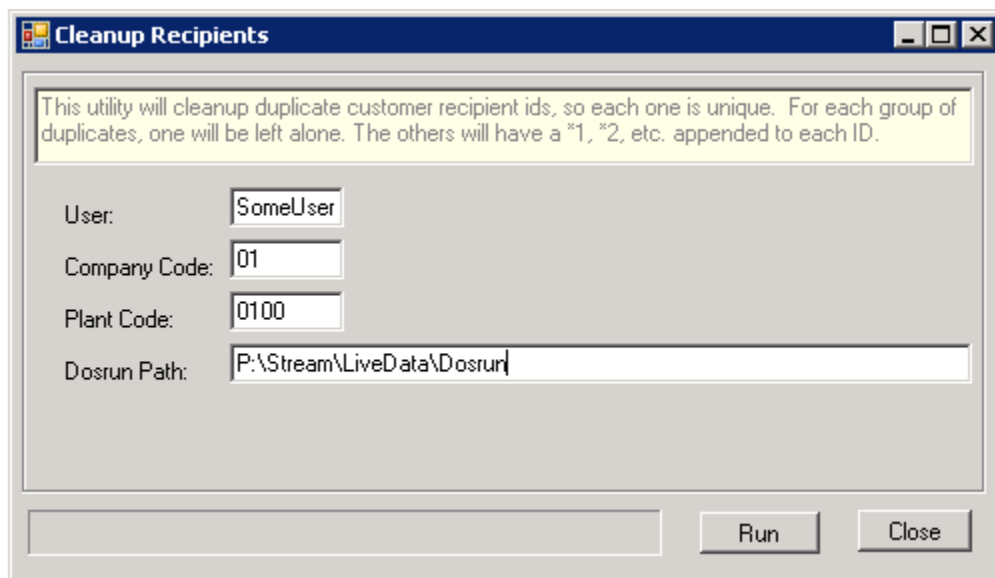


Enter a Printstream User account.

By default, Company and Plant appear. Change if necessary.

Enter the Dosrun path of your database.

Click **Run**.



The utility may take a few minutes to run, depending on the number of recipients to correct.

Duplicate Customer Recipient Ids will be made unique by leaving the original alone, then appending \*1, \*2, etc. for each subsequent recipient.

# Inventory: Net Masterfile.Inventory - Inventory - Edit Inventory Code when DSF in Use is Flagged

We made a change to .net Inventory manager that if the item is NOT DSF Shared we will allow edits to the Inventory Code field.

Inventory Manager ---genmulti\_2008\_14\_0\_dosrun --- Company: 01 --- Plant: 0100 --- User: LEAH

My PageQuick LinksMaster FilesTransactionsInventory SetupSettings and Utilities

Main Information X

NewSaveSearchEnter Init QtyView PictureChange Avg. PriceRefreshSettingCreate RevisionConvertNotesClose

FileManageOptionHelp

Item Search

Item #764257Inv. CodeRob DSF ShareRev. CodeDescriptionA DSF Share item

Main Inventory Information - Finished Goods

Item Information

Item #764257Inventory CodeRob DSF ShareRevision CodeIsAct

Linked Customer

Account #50910NameRobs Outdoor Seasons Shop

Main InformationRules /SettingsItem LinksExtra InformationPrinting SpecificationsCurrent QuantitiesFulfillment Settings

Inventory Description

DescriptionA DSF Share item

☒ DSF Shared☐ DSF Taxable☐ Combine in Carton☐ Can be used as Packing Material☐ Partial POD

Inventory Manager ---genmulti\_2008\_14\_0\_dosrun --- Company: 01 --- Plant: 0100 --- User: LEAH

My PageQuick LinksMaster FilesTransactionsInventory SetupSettings and Utilities

Main Information X

NewSaveSearchEnter Init QtyView PictureChange Avg. PriceRefreshSettingCreate RevisionConvertNotesClose

FileManageOptionHelp

Item Search

Item #764258Inv. CodeNot shared with DSF2Rev. CodeDescriptionTesting Not share w

Main Inventory Information - Finished Goods

Item Information

Item #764258Inventory CodeNot shared with DSF2Revision CodeIsAct

Linked Customer

Account #50910NameRobs Outdoor Seasons Shop

Main InformationRules /SettingsItem LinksExtra InformationPrinting SpecificationsCurrent QuantitiesFulfillment Settings

Inventory Description

DescriptionTesting Not share with DSF

Changed

☐ DSF Shared☐ DSF Taxable☐ Combine in Carton☐ Can be used as Packing Material☐ Partial POD

## Integration: DSF- Improve Catalog Updates to DSF

We made programming changes to make the DSF catalog sync of items to go faster due to the limitations of trying to sync many items at the same time. With the new flag, the system will only send items that have had changes made since the last sync. This also works in regard to if any items have had their images changed.

Below shows the new flag, when used, the DSF Synchronization will only send items that have been made since the last sync. This mainly will work if many items have been updated via the Item nomination Import. If items are modified manually, the system is already designed to send an update upon saving within the Item nomination itself. If the flag for the “Include Images” issued in conjunction with the “Only Modified Items”, the system will only send the images that have been updated recently instead of sending all items with images to DSF.

The screenshot shows a window titled "DSF Synchronization" with a close button (X) in the top right corner. The window is divided into several sections for different data types:

- Customers:** Includes a "Synchronize" button, "Last Synchronized: 1/27/2017 10:42:29 AM", and "By: LS". A red arrow points from the "Only Modified Items" checkbox in the Inventory section to the "Synchronize" button in this section.
- Recipients:** Includes a "Synchronize" button, "Last Synchronized: 1/11/2017 3:41:16 PM", and "By: BRIAN".
- Inventory:** Includes a "Synchronize" button, "Last Synchronized: 2/16/2017 1:56:30 PM", "By: BRIAN", and two checkboxes: ☒ "Only Modified Items" and ☐ "Include Images".
- Shipping Methods:** Includes a "Synchronize" button, "Last Synchronized: 1/11/2017 3:39:05 PM", and "By: BRIAN".
- Categories:** Includes a "Synchronize" button, "Last Synchronized:" (with an empty text box), "By:" (with an empty text box), and a "View Last XML" link.

At the bottom of the window is a "Messages" section with a large empty text area and a "Close" button in the bottom right corner.

**Note:** For items updated with the “Item Nomination Import”, there is a trigger that has to be installed so that during the DSF Synchronization, only the items that get updated via the import

are the ones that are sent to DSF when the “Only Modified Item” flag is used. Below are the instructions and the SQL trigger.

These instructions will guide you through the procedure to install a SQL Trigger in the ITEM\_NOM\_ITEM table in the PrintStream database.

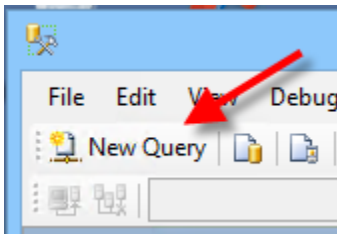
This trigger will compliment work done with the DSF Catalog update process.

You must have access to the SQL Server Management Studio.

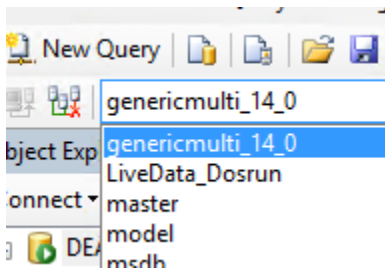
---

*Instructions:*

1. Run SQL Management Studio.
2. Click New Query.



3. In the database dropdown, select your Printstream database.



4. Copy and paste the following sql script into the Query window.

```
create trigger Item_Nom_Item_Trigger_Update on Item_Nom_Item
instead of update
as
    IF EXISTS
    (
        (SELECT
d.Active,d.Allow_Lot_Track,d.Allow_Serial,d.Bo_Rule,d.Cust_Id,d.Ext_Item_Desc,d.Fea
tured_Item,d.Force_Max,d.Force_Min,d.Global_Featured_Item,d.Held,d.Held_Reason,d.It
em_Id,d.Item_Nom_Item_Id,d.Markup_Perc,d.Max_Reason,d.Min_Ord_Qty,d.Min_Reason,d.Mo
dified_By,d.Nom_Id,d.Ord_Qty_Of,d.Order_Limit,d.Pricing_Policy,d.Ship_Mode,d.Show_O
```



```
n_Web,d.Sort_Key,d.Stkcateg,d.Sub_Basis,d.Sub_Effect_Date,d.Sub_Expire_Date,d.Substitute_Item,d.KitId,d.Use_Not_Avail_Msg,d.ExpirationDate,d.StartDate,d.ShipTax,d.Last_Dsf_Sync_Time,d.Last_Dsf_Sync_Image_Value
```

```
FROM deleted d
```

```
INNER JOIN inserted i ON i.[Item_Nom_Item_Id] = d.[Item_Nom_Item_Id]
```

```
except
```

```
SELECT
```

```
i.Active,i.Allow_Lot_Track,i.Allow_Serial,i.Bo_Rule,i.Cust_Id,i.Ext_Item_Desc,i.Featured_Item,i.Force_Max,i.Force_Min,i.Global_Featured_Item,i.Held,i.Held_Reason,i.Item_Id,i.Item_Nom_Item_Id,i.Markup_Perc,i.Max_Reason,i.Min_Ord_Qty,i.Min_Reason,i.Modified_By,i.Nom_Id,i.Ord_Qty_Of,i.Order_Limit,i.Pricing_Policy,i.Ship_Mode,i.Show_On_Web,i.Sort_Key,i.Stkcateg,i.Sub_Basis,i.Sub_Effect_Date,i.Sub_Expire_Date,i.Substitute_Item,i.KitId,i.Use_Not_Avail_Msg,i.ExpirationDate,i.StartDate,i.ShipTax,i.Last_Dsf_Sync_Time,i.Last_Dsf_Sync_Image_Value
```

```
FROM deleted d
```

```
INNER JOIN inserted i ON i.[Item_Nom_Item_Id] = d.[Item_Nom_Item_Id]
```

```
)
```

```
)
```

```
BEGIN
```

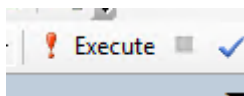
```
update Item_Nom_Item set Active = i.Active,Allow_Lot_Track = i.Allow_Lot_Track,Allow_Serial = i.Allow_Serial,Bo_Rule = i.Bo_Rule,Cust_Id = i.Cust_Id,Ext_Item_Desc = i.Ext_Item_Desc,Featured_Item = i.Featured_Item,Force_Max = i.Force_Max,Force_Min = i.Force_Min,Global_Featured_Item = i.Global_Featured_Item,Held = i.Held,Held_Reason = i.Held_Reason,Item_Id = i.Item_Id,Markup_Perc = i.Markup_Perc,Max_Reason = i.Max_Reason,Min_Ord_Qty = i.Min_Ord_Qty,Min_Reason = i.Min_Reason,Modified_By = i.Modified_By,Modified_Date = i.Modified_Date,Nom_Id = i.Nom_Id,Ord_Qty_Of = i.Ord_Qty_Of,Order_Limit = i.Order_Limit,Pricing_Policy = i.Pricing_Policy,Ship_Mode = i.Ship_Mode,Show_On_Web = i.Show_On_Web,Sort_Key = i.Sort_Key,Stkcateg = i.Stkcateg,Sub_Basis = i.Sub_Basis,Sub_Effect_Date = i.Sub_Effect_Date,Sub_Expire_Date = i.Sub_Expire_Date,Substitute_Item = i.Substitute_Item,KitId = i.KitId,Use_Not_Avail_Msg = i.Use_Not_Avail_Msg,ExpirationDate = i.ExpirationDate,StartDate = i.StartDate,ShipTax = i.ShipTax,Last_Dsf_Sync_Time = i.Last_Dsf_Sync_Time,Last_Dsf_Sync_Image_Value = i.Last_Dsf_Sync_Image_Value
```

```
From inserted i where Item_Nom_Item.[Item_Nom_Item_Id] = i.[Item_Nom_Item_Id]
```

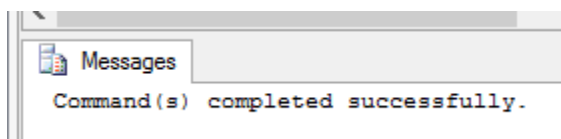
```
END
```

```
go
```

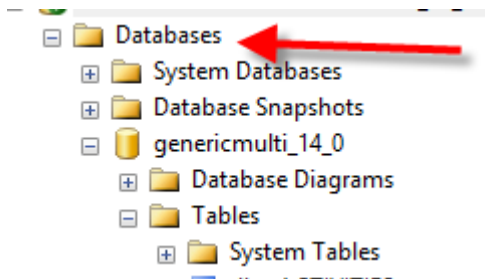
5. Click Execute.



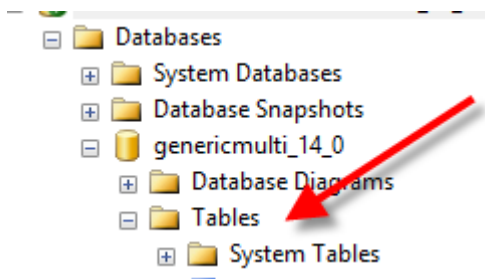
6. Your response should be. If not, start over.



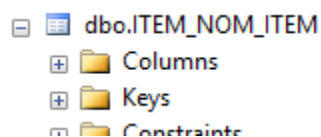
7. To confirm, open the Databases branch in the Object Explorer.
8. Open your Printstream database.



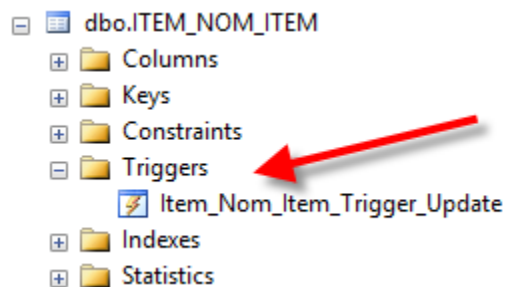
9. Open Tables.



10. Scroll down until you find the ITEM\_NOM\_ITEM table. Click to Open.



11. Open Triggers, to confirm the trigger was successfully created.



## Fulfillment: .Net Sales Order - Edit Ship To Recipient Address Line Item

Program changes have been made to allow users to change the address to the line item “Ship To” recipients. Within the “Item Detail” window, there is an “Edit Address” option.

The screenshot displays the .Net Sales Order application interface. The top section contains a search bar and a toolbar with various icons. Below this is the Sales Order Header section, which includes fields for Cust Batch ID, PO #, Ship Profile, Do Not Rel., Source Code, Warehouse, Product Type, Input Batch ID, MIS Job#, Ship Mode, Ship Before Date, SO Origin, Commission Code, Order By, Customer SO#, Monthly SO#, Ship Timeline, Need Date, Order Type, Cost Center, Order Notes, and Commissions. The main section is a table of items with columns for Alt. ach, Item#, Inv Code, Rev Code, Item Desc, Need Date, UOM, Gross Qty, Min Qty, Max Qty, Avail Qty, Qty On Ord, Order Qty, Return Qty, Unit Price, Weight, Line Item Weight, Status, Serial #, MES Job#, and Ship. The bottom right section is the Item Detail window, which is open for the selected item. It shows the Ship To Address section with fields for Address Line 1, Address Line 2, Address Line 3, City, State, Zip, Country, and Edit Address. The Edit Address option is highlighted with a red arrow. The Item Detail window also shows the Inventory section with fields for Available Qty, Qty On Order, Item Weight, Group, Family, and Category.

Alt. ach	Item#	Inv Code	Rev Code	Item Desc	Need Date	UOM	Gross Qty	Min Qty	Max Qty	Avail Qty	Qty On Ord	Order Qty	Return Qty	Unit Price	Weight	Line Item Weight	Status	Serial #	MES Job#	Ship
FG	54637	BP-1386...		test	2/15/2017		2	0	0	137		2	0	0	0	1	2	Comm		BP11
FG	54648	BP-1386...		test desc	2/15/2017		1	0	0	194		1	0	0	0	1	Comm		1386	
					2/15/2017		0	0	0	0		0	0	0	0		UnProcessed			

Shipping Notes:

Item Detail

Ship To Address

Address Line 1: 24 test

Address Line 2: test 3

Address Line 3: Suite 41

City: ACKWORTH

State: GA

Zip: ACKWORTH

Country: UNITED STATES

Edit Address: ...

Inventory

Available Qty: 194

Qty On Order: 0

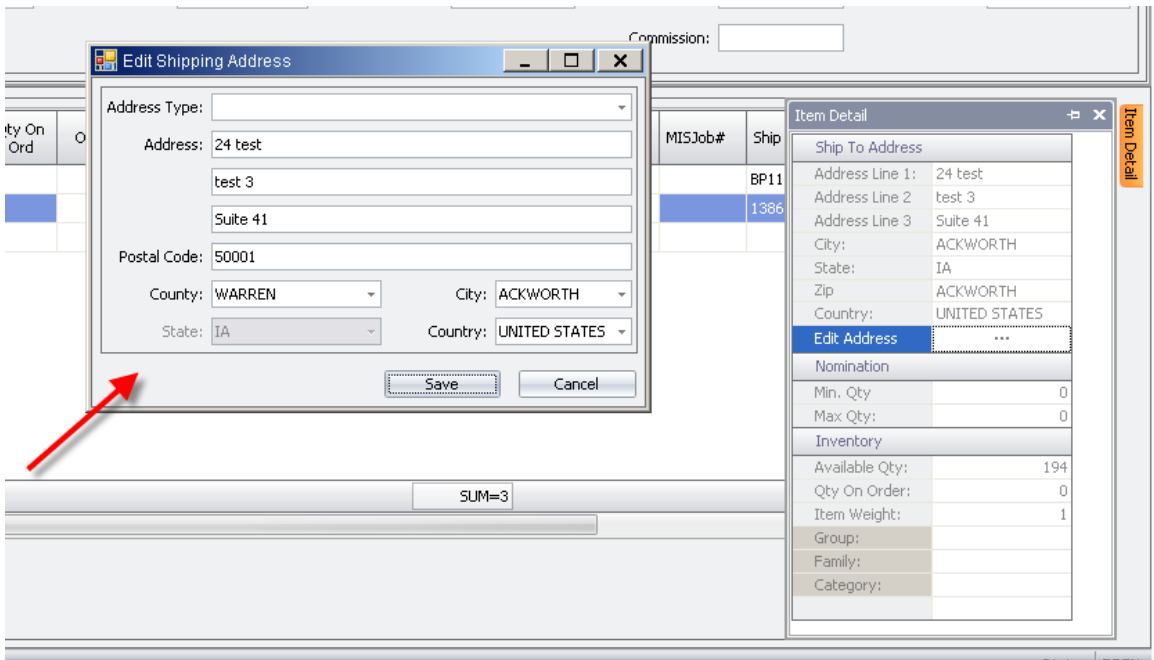
Item Weight: 1

Group:

Family:

Category:

The “Edit Shipping Address” window will open.



Click the “Save” button and the “Recipient Address” window will appear, and you can save the address as a “New Address” or “Update Address”

**Recipient Address**

You have changed address for one or more recipient.

You can save the address as a new address or update existing address. **Updating WILL CHANGE the current address that will affect all addresses for existing orders for the recipient.**

Please select either to save changes as new address or update existing one:

Recipient ID	Cust. Recipient ID	Save Changes As
12516	1386	<input checked="" type="radio"/> New Address <input type="radio"/> Update Address

City: ACKWORTH State: IA Country: UNITED STATES

Buttons: Ok, Cancel, Save, Cancel

Background window: Item Detail

MISJob#	Ship
BP11	
1386	

Ship To Address	
Address Line 1:	24 test
Address Line 2:	test 3
Address Line 3:	Suite 41
City:	ACKWORTH
State:	IA
Zip:	ACKWORTH
Country:	UNITED STATES
<b>Edit Address</b> ...	
Nomination	
Min. Qty:	0
Max Qty:	0
Inventory	
Available Qty:	194
Qty On Order:	0
Item Weight:	1
Group:	
Family:	
Category:	

For an integrated system with Pace or Monarch, if the recipient is an elevated recipient, the system will not allow the address to be update due to that option changes the default address. The system will only allow the addition of a new address that is not going to modify the default.

**Recipient Address**

You have changed address for one or more recipient.

You can save the address as a new address or update existing address. **Updating WILL CHANGE the current address that will affect all addresses for existing orders for the recipient.**

Please select either to save changes as new address or update existing one:

Recipient ID	Cust. Recipient ID	Save Changes As
12516	1386	<input type="radio"/> New Address <input checked="" type="radio"/> Update Address

Buttons: Ok, Cancel

Error Message:

**Cannot change address**

You cannot update address for an elevated recipient

Buttons: OK



**Manage Technical Support Logging**

Log Type: Comprehensive

Extensive details will be maintained and saved into the Event Log Page, even if there are no errors are reported.  
 To maintain system resources, this option will automatically be reverted after 3 days.

Functional Areas:

- ☐ Accuzip
- ☐ Clear Cache Synchronization
- ☒ EFI Extended Apps
- ☒ External System Connector
- ☐ File Converter
- ☐ JDF
- ☒ MIS System
- ☐ Pagination Algorithm
- ☒ Pricing
- ☒ PunchOut Integration
- ☐ Rogo
- ☒ Shipping
- ☐ Storefront Customization
- ☐ Taxes
- ☐ Ticketing (Automated Ticket Upgrades)
- ☐ Ticketing (Automated Ticket Upgrades)
- ☐ Ticketing (Classic Preview)
- ☐ Ticketing (Integrated Ticket Messages)
- ☐ Variable Data Product Engine
- ☒ Workflow Tracking
- ☒ XML Validation
- ☒ Other

**Save**

The event log will show the reason the order failed to be passed into the MIS system, see below for an example.

<a href="#">Home</a>   <a href="#">Cart (0) :: My Account :: Order Status :: Print Shops :: Contact Us ::</a>			
<a href="#">Impersonate Sub-Entity Admin</a>   Welcome John Thomas!   <a href="#">Logout</a>			
<a href="#">Storefront</a>   <a href="#">Administration</a>   <a href="#">Operator View</a>   <a href="#">Go</a>			
<b>Event Log</b>			
<a href="#">Normal</a>   <a href="#">Search</a>   <a href="#">Start Recording Workflow</a>   <a href="#">View Recorded Workflow</a>   <a href="#">Configure</a>			
Time	Event	Event Description	Stack Trace
12/13/2016 3:20:02 PM	37225	TRSystems.DigitalStorefront.OrderSystem.MISOrderSubmissionDataException: The MIS '100002' received the OrderInformation XML for order '314662' but the requested failed. ***** IMPORTANT MESSAGE FROM MIS EXPLAINING WHY THIS ORDER DATA WAS REJECTED: 'Name Normal' was not found in the SOTypeType table for CustomerID '3379' and ProjectID '151'.	
12/13/2016 1:59:11 PM	37112	System.Exception: Exception of type 'System.Exception' was thrown. MISIntegrationManager.SetProductRank setting rank for product id 272 - Item 1 (Normal Item) to Standard; range 1 - 999999 or rank 0 was invalid. Server name: PSQA-DSF	Void SetProductRank(EFL.DigitalStorefront.Catalog.CatalogItem, TRSystems.DigitalStorefront.OrderSystem.OrderInfoXML.OrderInformation.Product, Void ProcessProductUpdate(Int32, TRSystems.DigitalStorefront.OrderSystem.OrderInfoXML.OrderInformation.Product, TRSystems.DigitalStorefront.DSF_MIS_Association, System.String) Boolean ProcessCatalogUpdateRequest_Internal (TRSystems.DigitalStorefront.OrderSystem.OrderInfoXML.OrderInformation.Catalog, System.Collections.HashableByRef, Int32, System.String) Boolean ProcessCatalogUpdateRequest(System.String) Void ProcessProductListItem

# Inventory: Net Masterfile.Inventory - Inventory - Edit Inventory Code when DSF in Use is Flagged

We made a change to .net Inventory manager that if the item is NOT DSF Shared we will allow edits to the Inventory Code field.

Inventory Manager ---genmulti\_2008\_14\_0\_dosrun --- Company: 01 --- Plant: 0100 --- User: LEAH

My Page Quick Links Master Files Transactions Inventory Setup Settings and Utilities

Main Information X

New Save Search Enter Init Qty View Picture Change Avg. Price Refresh Setting Create Revision Convert Notes Cle

File Manage Option Help

Item Search

Item # 764257 Inv. Code Rob DSF Share Rev. Code Description A DSF Share item

Main Inventory Information - Finished Goods

Item Information

Item # 764257 Inventory Code Rob DSF Share Revision Code IsAct

Linked Customer

Account # 50910 Name Robs Outdoor Seasons Shop

Main Information Rules /Settings Item Links Extra Information Printing Specifications Current Quantities Fulfillment Settings

Inventory Description

Description A DSF Share item

☒ DSF Shared ☐ DSF Taxable ☐ Combine in Carton ☐ Can be used as Packing Material ☐ Partial POD

Inventory Manager ---genmulti\_2008\_14\_0\_dosrun --- Company: 01 --- Plant: 0100 --- User: LEAH

My Page Quick Links Master Files Transactions Inventory Setup Settings and Utilities

Main Information X

New Save Search Enter Init Qty View Picture Change Avg. Price Refresh Setting Create Revision Convert Notes C

File Manage Option Help

Item Search

Item # 764258 Inv. Code Not shared with DSF2 Rev. Code Description Testing Not share w

Main Inventory Information - Finished Goods

Item Information

Item # 764258 Inventory Code Not shared with DSF2 Revision Code IsAct

Linked Customer

Account # 50910 Name Robs Outdoor Seasons Shop

Main Information Rules /Settings Item Links Extra Information Printing Specifications Current Quantities Fulfillment Settings

Inventory Description

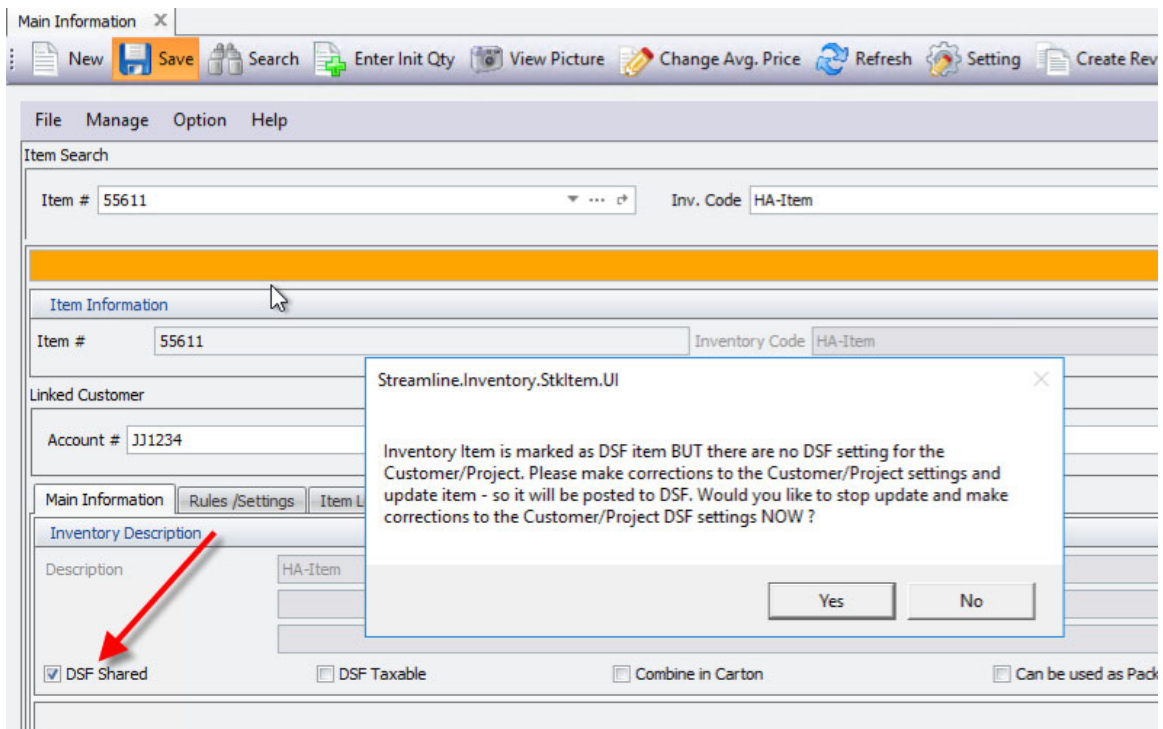
Description Testing Not share with DSF  
Changed

☐ DSF Shared ☐ DSF Taxable ☐ Combine in Carton ☐ Can be used as Packing Material ☐ Partial POD



## Inventory - Need WARNING for: Printstream it is not generating an XML

For Inventory manager, we added a message for items that are marked as “DSF Shared” but the customer is not setup for DSF. This will inform the user that when the item is saved with the flag on within “Inventory Manager”, no DSF Catalog XML will be sent to DSF. Inventory Manager will only send updates to DSF when the customer is setup for DSF use.



## DSF Orders – adding lines to orders after order is in PrintStream

Order lines should never be added to an order in Printstream after the order comes from DSF. When a DSF Order comes into PrintStream, there are DSF Order IDs attached to each order line. When you release some of those lines, that information is sent to Monarch where the Order and the pull ticket (pick) are recorded. However, line items that were manually added to the open order in PrintStream and then released did not generate an Order XML because there is no DSF Order ID linked to the lines being released. The Order Resend Utility cannot be used to process the order because an Order XML is not available.

The correct procedure is to either cancel the order in DSF and place a new order with all the line items or just place a new order in DSF for the additional lines.