Printer Guide

Quick Start Guide

Step 1: Setup your Profile

See Profile under Configuration

After logging into PrintGizmo create your profile and complete the information requested by navigating the menu to *Configuration* > *Profile*.

The contact information section should be used for a brief history of your business along with payment options.
Note: Entering your Payment Note (example: We Only Accept Visa and MasterCard) and Payment URL is important so customers can pay you for their orders.

The next heading is 'FTP'. Enter your FTP information to transfer artwork from a customer's order to your server.

'Address' heading section includes the option to enter an SMS phone number in order to receive SMS/Text messages when you have received a new order.

By toggling 'Local Delivery' to green, you give the option to make local delivery to your customer. **Note:** You are encouraged to provide a radius for a Local Delivery in your printer profile.

The final setup on this page is a section for 'Tax'. Here you select the state(s) where you have locations in order to collect sales tax from the customer as part of the order.

Click 'Save' when you are finished adding your profile or making changes.

Step 2: Setup your Prices

See Manage Prices under Products and Prices

Multiple options are available to enter your pricing. Click on each option to determine which is best for your company and its products.

Step 3: Processing Orders

See Active Orders under Orders

Introduce this to your team members and get ready to gear up for production!
Here is where you can start managing incoming orders.
When placing orders buyers are given an estimated delivery date that takes account for production and shipping time in business days. Production time for the products by the printer is up to 6 business days for all products.

Dashboard

Overview

After logging into PrintGizmo, you will see the Dashboard of our portal.

On the top right hand corner:

PrintLynxx Portal: This is a link to your portal for more customized print. 

Printer Product Price: View to compare your price to other printers' price 

Dashboard: Displays the Total Jobs, Active Jobs, Total Orders, Active Orders. An Order can have multiple Jobs. General information about the your company is also visible.

Navigation menu left-hand side: Scroll and select Dashboards, Orders, Quote Management, Products and Prices, Configuration, Reports

Orders

Active Orders

Orders > Active Orders

This contains everything you need to manage orders for which a customer has chosen you to print. This section also contains quick links to common order management actions such as update order status, download print ready file, identify overdue orders and more.

The body of the page contains a summary of the orders, customer contact details, billing amount and more. Each time a customer places an order, a new order ID is automatically generated and is never repeated. Orders that have exceeded their due date (up to 6 business days for all products) will be highlighted in red.

Note: The bottom of the page has a legend for the meaning of each icon.

You have multiple ways to search orders such as, name, email address, order status, duration and more so that you quickly get to what you are looking for. You can filter by traits to specifically get to the order type you are searching. Rest your cursor at each icon to know what they stand for or refer to index at the bottom of the page.

Update Order: You can easily change the order status by clicking on 'Pencil' icon in the Status column. Click User Notify if you wish to send an email notification about the change in order status.

Multi-Action (left side of screen): From the action dropdown list at the top left choose an action and click the orders for which you want to execute that action. To select all orders at once, click the checkbox in the top bar and click 'Submit'.

Export Orders: You can export all customer orders by clicking on Excel Icon Top right corner above Action.

New Order Notification: You will receive the notification for new customer orders in the top right corner of your portal.

Action Menu (right side of screen)

Note: This is used for changes to a single row at a time.

View/Update Order: This section lists all the information related to Shipping, Order Details, Order Product Details, Order History and Payment request history. Order History is a record of all the changes made in this particular order. Payment request history is the record of all the payment requests created for the particular order and its actions. Under this tab you can edit shipping and order information. Tracking number is automatically generated if any of these shipping methods are selected – UPS, USPS or FedEx. For Weight Based and Quantity Based shipping methods, tracking number is to be filled manually. The due date will show in the view orders overview. If the due date is exceeded, the order will be highlighted in red. The 'Estimated Delivery Date' is seen under Payment and Shipping.

Modify Order: Edit shipping and billing address. Upon customer’s request you can add more product options or increase order quantity. A quick link to online calculator allows you to calculate the revised price as per the new requirements. You can also add new products or remove existing products, upload product art work, and initiate the approval cycle for the respective product.

If the amount of the order has been changed, the customer has the option to view the changed shipping charges and tax calculations. To recalculate these charges, the customer must click on ‘Calculate Shipping Rate or Tax Calculation’ (bottom right corner). By filling required fields, a comment can be posted and changes saved.

Next, you will need to request payment for revised amount. This can be done from Payment Request link in View Orders.

Download Invoice: Instantly generate a PDF of the invoice.

Download File: Download zip file containing print-ready file and job ticket.

Download Shipping Label: Download a Shipping Label for a particular order.

Download Job Ticket: Download print job ticket for the order.

Impose Order: You can use the print ready file if already available or use the option 'Do you want to re-upload print ready file?' to be able to impose a job. Use the 'Upload File' button and select the upload file location from your computer.

Archive: Move order to archive section. After clicking, you will have the option to cancel or archive.
Note: Auto archive will automatically send orders marked as 'Completed' directly to the Archive section.
Store Configuration > Settings > Search with 'archive' > Order Auto Archive (Select 'Yes')

If you want to replace the print ready file within the order as well, use the option 'Do you want to replace existing print ready file?' to upload the updated file.
Once the PDF file is uploaded, select a schema from the available list, click 'Impose Now’ to get the final PDF file with job imposed on it as per the selected imposition schema.

Add New Order

Orders > Add New Order

This section allows you to enter and manage orders inside this storefront which have been placed outside of this online storefront.

Note: This may or may not be applicable.

Add New User

Orders > Add New Order

Here you can place an order on behalf of your existing user or with permissions provided by PrintGizmo you can create a new user and place an order on his/her behalf. You are required to enter the details of the customer and their shipping address. Next, you need to add a product to the order from 'Add New Product' interface. To place an order for an existing customer, you are required to search either by Name or Email address.

Export Orders

Orders > Export Orders

This section allows you to export all your order records into your offline system. You need to first configure Export settings to enable order transfer. Once Export setting is configured, simply select the order range, time duration and order status and click Export to move order records to your offline system. Click Manual transfer if you wish to move only selective orders to your offline system.

Coupons/Discount

Orders > Coupons / Discount

Coupons in addition to discounts in either a fixed percentage or amount can be offered to your customers. In addition to an amount for discounts and coupons, the offer can be made for a specific date, or, time duration. Here, at-a-glance you establish and manage your offers.

Note: This may or may not be applicable.

Status: The status is automatically changed by the system depending upon the coupon/discount validity duration. Coupon/discount running currently will have status as Green (Active). Coupons and discounts can be set for future dates and times and will be highlighted "Coming Soon".

Action Menu (right side of screen)

Edit: Edit details of this coupon/discount.

Duplicate: Instantly create a duplicate of the selected coupon/discount. Make the required changes and click 'Save'.

Delete: 2-step confirmation to permanently delete this coupon/discount.

Add

Orders > Coupons / Discount > Add (Top Right Button)

Discount Title: Title of the discount

Type: Select reduced price offering from three types below:

Coupon: Select this option if you want to offer coupon code to your customers which they need to redeem at the time of checkout to avail discount. It can be made available to all or specific retail and organization customers.

Discount: Discounts can be offered on all products, or specific products. The offer can be set to a specific user. If you want the discount applicable only to shipping select the radio button. The customer will see a strike-through on the current price next to the discounted product or shipping price.

Combo Discount: You can set discount on a combination of specific products. On the storefront, your customers will see a strike-through on the current price next to the discounted price.

Import Coupon

Orders > Coupons / Discount > Import Coupon
To mass upload coupons, simply follow the steps there and import the Excel file.
Note following points to avoid wrong or omitted coupon entries into the system:

- Do not delete or interchange any column in the sample Excel file
- Do not change title of any column
- Leave columns blank when not relevant
- For clarification column title, refer to Step 2. Sheet names are displayed in tabs

Revoking records: After importing records you will get an option to 'Undo or Close.'
To revoke the imported multiple coupons, click 'Undo'.
To have those records (coupons) on the system, click 'Close'.

Archive Orders

Orders > Archive Orders
Archiving orders reduces clutter in the List Orders section. Orders archived are available for future reference. However, archived orders are not available for any action.

Multi-Action (left side of screen): From the dropdown list at top right select an action. Click on the orders for which you wish to make this action happen. To select all orders for the action, click GO in the checkbox.

Action Menu (right side of screen)

View/Update Order: Displays Summary of this order along with its details regarding product, shipping, order history and more.

Restore: Move this order to View Order section.

Download Invoice: Download the Invoice as a PDF.

Quote Management

View Quotes

Quote Management > View Quotes

The View Quote page provides important information for all quotes requested by customers. Customers have the option to request a quote for up to three different quantities on a single quote. The order will be considered for only the approved quantity.

New Quote Notification: When a quote is requested, a notification will appear at the top right corner of your Dashboard.

Action Menu (right side of screen)

Edit: Enter your quote.

You have three ways to respond to the customer's quote:

Enter Quote Price: Click this option if you can offer this product at the customer's requested quantity. You can enter different price for different quantities. Click Save when pricing and other information is completed. A file can be uploaded here for your customer to view and approve. Completing this action will change quote status to 'Quotation'.

The quote status will be updated in the customer's My Account and the customer will receive notification to review (if this option is enabled). Customer can approve or reject your quote from their My Account.

The customer is required to accept and place the order within 30 days of approving it. An expired quotation will show in their My Account. When the customer rejects your quotation, the quote status will turn to 'Quotation Rejected'.

Once customer approves your quotation, they can then place order for that particular quote and quote status automatically changes to 'Quotation Approved'. If the order is successfully placed, the quote status will be 'Quotation Completed' and will show in the Active Orders Section.

Post Message to Customer: Click this option if you need to ask for more details from the customer. You can even upload file for customer's approval along with the quote. Completing this action will change the quote status to 'Customer Review Pending'. Your message will show in the customer's My Account from where they can post a reply. Once the customer replies, the quote status will change to 'Admin Review Pending'.

Quote Cancelled: Click this option if you want to decline the quote request from the customer. You can state the reason in comments section and the customer will receive your reply in their My Account. Click Customer Notify to send email notification to the customer. Completing this action will change selected quote status to 'Quote Cancelled'.

Note: It is recommended that you take only one action at a time when some response is awaited from the customer to avoid any chance of overlapping actions. For example, if you have entered your quote amount on customer's quote, you should not use 'Post Message to Customer' unless your quotation is approved or rejected by the customer. If you use 'Post Message to Customer' in this scenario, it makes your previous quotation void and you will need to enter the quotation again for the customer to approve or reject it.

Organization Management

Fee Schedule

Organization Management > Fee Schedule

This section allows you to view organization you do business and see if there is a Printer Transaction Fee applicable or not. Organization with a green symbol have applicable transaction fees of 2.9%. Organization with a red symbol do not have transaction fees associated.

Products and Prices

Print-to-Order Products

Products and Prices > Print-to-Order Products

This section allows you to manage all product pricing. At-a-glance you can tell any product's category, size options available, product personalization options and whether the product is available to retail, organization customers or both.

Action Menu (right side of screen)

Price: Enter your prices here for the product that you selected. You can select to view the price for Retail, for all organizations or for particular organization. You can also search and see the price for Additional options if the product has any additional option.

Additional Option: Enter your prices for additional options for the product that you selected. From here you can also select Attribute Price from which you can determine a price based on quantity. **Note:** Make sure to enter prices for every possible option such as paper, coatings, sides, and corners. This ensures you show up as an option for a customer on PrintGizmo.

Predefined Products

Products and Prices > Predefined Products

This section allows you to manage products for which personalization is not required, for example, business card holder, banner stand, etc.

Action Menu (right side of screen)

Price: You can select to view the price for Retail, for all organizations or for particular organization. You can also search and see the price for Additional options if you have created any additional option.

Additional Option: Here you can view more information on the product that you selected additional option. From here you can also select Attribute Price which you can determine a price based on quantity.

Kit Product

Products and Prices > Predefined Products > Kit Product (Top Right Button)

The Kit Products is there for printers knowledge of any products that are being sold as kits.

Manage Prices (Sub-section)

Product Price

Products and Prices > Manage Prices > Product Price

This section allows you to enter and view price of products and its additional options for both retail and organization or a specific customer organization.

Select the product from the dropdown list and the customer type or additional option for which you want to set price and click View Price.

Below is brief description of the options in the dropdown list:

Retail Price: This price will be visible to all retail customers.

Common Price for all Organizations: Enter pricing for total organization customers which will display on the organization’s storefront.

Name of A Specific Organization: Enter pricing for a specific organization which will display on the organization’s storefront.

Additional Option Price: Once you select this option, another dropdown list will appear with all the additional options for that product. **Note:** Make sure your prices are correct, including decimal points.

Pricing Table

You can set product price for all the variables (such as sizes, quantity, quantity range, etc.) that are assigned to a particular product. Click on Add New Price on the top right of every price table to add more pricing as per variables such as quantity and quantity range.

Product Price- Bulk

Products and Prices > Manage Prices > Product Price - Bulk

First select the price category for which you want to enter bulk pricing. Based on this, product list will populate in the field below. To select multiple products, press Ctrl and click on the products for which you want to set bulk price.

Next, select the quantity range and enter value for bulk price and select the markup or markdown. Value entered for Fixed Increase or Decrease will be taken in your base (default) currency.

Product Option Price - Bulk

Products and Prices > Manage Prices > Product Option Price - Bulk

First select the price category for which you want to enter bulk pricing. Based on this, products with their additional options will populate in the field below. To select multiple additional options, press Ctrl and click on the additional options for which you want to set bulk price.

Next, select the quantity range and enter value for bulk price and select the markup or markdown. Value entered for Fixed Increase or Decrease will be taken in your base (default) currency.

Product Price - Import

Products and Prices > Manage Prices > Product Price - Import

To mass upload pricing for products as well as its additional options and combined options, step by step instructions are displayed on the website.

Following is a brief highlight for each of the steps:

Step 1: Download Sample File

First, fill in the details on the left side drop-down list. Based on this, the system will automatically populate products that match your choices in the dropdown menu. To select multiple products, press Ctrl and click on the products for which you want to add price.

Step 2: Excel Field Description

Highlights of various labels used in the Excel file downloaded in Step 1.

Move between the tabs to view details covered under each. The information serves as a reference to fill in the Excel file. For example, you can search for the Organization Id and accordingly fill in the Excel file.

Step 3: Upload Product Price

Upload the Excel file filled with pricing details. Then select for whom this pricing will be applicable – Retail Price, Organization Price, Option Price or Option Combined Price. You can upload only one Excel file at a time for retail, organization, option price or option combined price.

Step 4: Product Price Validation Summary (When you Upload File, Step 4 will automatically appear.)

A summary of the records you have entered. Data Summary shows:

Valid records: Records correctly entered into the Excel sheet and ready for entry into the system.

Invalid records: Records that have some missing information but can be taken into the system.

Skipped records: Records that are wrongly entered and will not be taken into the system. Submit records when all records have been confirmed to be correct.

Organizational Discount

Product and Prices > Manage Prices > Organizational Discount

Organizational Discount is used for giving discounts on items based on percentage.

By clicking the dropdown '*Select Organization:*' you can choose what organization these discounts are being applied. After selecting the organization of choice a user can put in individual percentage discounts for each product that is to be discounted.

Note: Discounts are applied in positive percentage format. Ex. 10, 20, 25, 30.

Note: Discount will be applied to the rate card for the organization selected. If you have not previously entered a rate card for the organization, discount will be applied to retail prices.

Note: For applying coupons or discounts of other kinds you can see 'Coupons / Discounts' under the orders tab.

Configuration

Profile

Configuration > Profile
Under this tab you will see section for editing the Printer Profile.
Note: This area was described in Step 1: Enter your Profile.

Profile: You can change Printer Name, Username, Email, Password, Payment URL, Payment Note, Printer Logo, Contact Information and Pause Orders.

Note: Pause Orders: Activate (Green) this option to remove yourself from receiving orders, to resume receiving orders just Inactivate (Red) this feature.

Note: Entering your Payment Note (example: We Only Accept Visa and MasterCard) and Payment URL important so customers can pay you for their orders.

FTP: This is where you can enter FTP information to receive artwork from customer orders.

Address: This is where you can enter your address, phone number and a phone number to receive SMS notifications.

Local Delivery: Can be toggled on and off to let a customer know there is local delivery available.
Note: We encourage you to list in their 'Contact Information' the area where local delivery is available. Such as Pennsylvania or 10 Miles from Chambersburg, PA so customers can choose the Local Delivery or Shipping method accordingly.

Tax: Here you must choose from Unassigned States where printing plants are and move them to Assigned States; this information is used for tax purposes.

Review

Configuration > Profile > Review
This area is used to view ratings that customer gave you for their order. It includes a star rating (1-5), Comments, and Printer Comments, Status (PrintGizmo Admin manage statuses), and Review Date.

You can navigate the top with the search area, select from and to dates, and by status.

You are provided an opportunity to respond with comment to any review provided by a customer before it becomes visible on the website. Additionally, a View Notification appears in the top right under the bell in the portal.

Note: All reviews are kept in moderation until such time as PrintGizmo Admin (moderator) releases the review to be displayed publicly. The rating system in PrintGizmo sends an email to the buyer after the order has shipped. The buyer can then enter a review for the printer/transaction. That review is then visible to the printer in their portal and allows them to enter a response to the review. The review, once approved by the moderator, displays the buyers comment and star rating along with the printer's response to the review.

Shipping Methods

Configuration > Shipping Method
By default, PrintGizmo calculates shipping based on the published rates for the appropriate couriers. If you prefer to use your shipping account and rates which may be lower than the published rates, we advise you to configure the Shipping Method pages. Once configured, you will also be able to generate Shipping Labels using your shipping

account in PrintGizmo. Shipping Method page enlists all shipping methods available for you to use on the storefront. However, the customer will actually be able to use a particular shipping method only if it is configured correctly.

You can toggle the status as Green (Active) or Red (Inactive) which shipping methods you desire to allow the customer to select. If you have only enabled 'Local Pickup From Store' and all other shipping methods are inactive, the entire 'Shipping' module will not be visible. Once you enable any of the other shipping methods available, the Shipping module would start displaying again.

Action Menu (right side of screen)

Edit: Modify existing shipping method setup. Since different shipment methods can have various set of configurations, the Edit form can be different for every other shipping method.
For weight and quantity based shipping methods, you can decide to display which shipping type needs to be displayed to the customer on the Payment Details page. For such shipping methods, you also have an option to set up a Tracking URL which can help customers to track their product shipment status. You can also update Shipping handling cost in Online and offline shipping methods.

Markup/Delivery Days: While using any of the third party shipping methods like UPS, FedEx, etc., you also have an option to set mark-up percentage which is charged extra to the customer on each order. You can use this setting to recover any cost from customers that you may incur while offering such third party services (You may call it as 'Third Party Service Fee').

Shipping Package Configuration: Set package price for individual products based on parcel length, width, height, weight class, and length class.

Reports

Order Summary

Reports > Order > Order Summary
This report provides a summary of orders you have received. Information can be searched by multiple configurations; i.e. date range, customer type, order status, duration of time, and more. Number of orders, price, tax, shipping, discounts can also be displayed. Clicking on number of orders link redirect to Order Detail report and display each order’s details. Total of each field is displayed at the top of report.

Order Detail

Reports > Order > Order Detail
This report provides detailed information related to sales orders. Report information is based on selected date range, order status and customer type. Information on this report includes Order number, Order Date, Customer Details, Product Details, Quantity and various prices. For example, price with tax, shipping, discount, subtotal and order total amount can be found.

Clicking Order No. link will redirect to Edit Order Page, whereas clicking on the Customer’s name redirects to customer detail page. Totals for each pricing field is displayed at the top of the report. Helpful information like who created a particular order, especially in the case of orders directly created from your panel, a field 'Created By' can be found. This information is available also when the order detail report is exported in excel or CSV format.

Transaction Fees

Reports > Partners > Transaction Fees
Provides information on PrintGizmo transaction fees for each order. Report information varies based on the selection of date range, commission payment status or sales agent selected. Click on button at top to print or export to Excel.

Report contains order id, order date, sales agent and customer details, total order amount, total commission amount as well as percentage, and commission payment status

Clicking on order id will redirect to view order page. Total of order amount and commission amount is displayed at the top of the report.

Printer Order Summary

Reports > Partners > Printer Order Summary
Provides information on PrintGizmo transaction fees for each order. Report information varies based on selection of date range, order status or printer selected. Click on link at top to print or export to Excel.

Report contains printer details, assign job count, order products count and price. Clicking on printer details link will redirect to your personal details page. Clicking on assign job count link will generate printer report in different tabs. Clicking on order products count link will generate printer report in different tabs.

Total of assigned job count is displayed at the top of the report.

Admin

Admin

Admin > Admin
The description of this entire module is based on the login of the super admin. The super admin has rights to create/add new admin users, edit existing admin details and delete existing admin users from the admin user management panel.

Information found here includes user name, group name and email address of the admins. It also contains quick links to common admin management actions such as edit/delete and login as admin.

Action Menu (right side of screen)

Edit: Modify existing details of the admin.

Login as Admin: Login into this admin’s user panel.

Delete: Permanently delete this particular admin user.

Add

Admin > Admin > Add (Top Right Button)

Create new admin users, define their access rights and assign to a particular group. Create super admin users with full access rights. Complete requested information, then click Submit to instantly create an admin user account.

Admin Group / Role

Admin > Admin Group / Role

This section contains information about admin groups that you have created. From here you are able to create various groups for store admin users, admin groups for total organization, and admin groups for specific organization. As a super admin, you are able to assign role-based access rights to each of these groups. Only the admin users with active group status will be able to log into their admin panel.

Action Menu (right side of screen)

Edit: Edit the name assigned to a particular group.

Delete: Permanently delete an existing group. Groups with assigned admin users can not be deleted. To delete such groups, first delete all assigned admin users and then delete store admin group.

Add

Admin Group / Role > Add (Top Right Button)

Add new admin users with role based access rights. Only active groups can have admin users assigned.