# Quick Start Guide

In order for a Broker to begin using PrintGizmo, a profile must be established, followed by other details about the broker and its customers and the products to be bought. Following is a summary of steps, followed by reference guide to begin.

# Step 1: Broker Setup

## See Organization under Organization Management

Here a broker can enter and edit details about its business, set configuration and content settings, plus make decisions about how the broker wishes to do business. Click the Action dropdown and click 'Edit' to begin. See *Organization Management > Organization.*

Under the 'Action Menu' you will see the following: Dashboard, Edit, View Users, Departments, Manage Address, Manage Payon Account, Personalize Store, Inventory, Organization Profile, Invoices.

## See Departments under Organization Management

Here you can create and edit departments. To add a department simply click the 'Add' button in the upper right hand corner. You can then enter the information you desire, then click 'Save & Back' when finished. See *Organization Management > Departments.*
**Note:** This may or may not be applicable.

## Adding Users: See Website Users under User

Here you can add users. Click 'Add' at the top right, then enter the information required. Click 'Save & Back' when finished. See *User > Website Users.*

# Step 2: Creating Products/Templates

## See Print-to-Order Products under Products and Prices

Complete the required information, review configuration and enter descriptions for the product. Click 'Save & Continue'. Now Enter the Size Title, Bleed Size, Fold Options, and Sort for each size added. Below is Setup Product Margins. **Note:** Default PrintGizmo products are assigned but if you wish to customize or create your own you can for your organizations so they have branded templates for their use. Default PrintGizmo products sort order cannot be changed.

This is where you enter Safe and Cut Margins for the specific products.

Enter page names with their sort order i.e. Front Page, Back Page. Click 'Save & Continue' when finished.

Next step is to enter quantities so printers can price your product. Click 'Save & Continue' when finished. See *Products and Prices > Print-to-Order Products* for details on the above sections.

The next step is to Manage Designer Rules, see *Products and Prices > Print-to-Order Products > Action dropdown > Additional Options > Manage Designer Rules (Top Right Button)* for details.

## See Product Templates under Templates

Create templates by clicking 'Add'. Fill in the required information, click 'Save & Continue'. When the Designer Studio has loaded, create your design, click 'Continue' to Save this design. Your design will then be available to your users. See *Templates > Product Templates.*

# Step 3: Launch

## Introduce to your Users and Printers

After completing the above preliminary steps, it is time to make an introduction of this storefront to your users. The benefits of using this storefront for buying printed products is that your users can save money, streamline efficiency and provide transparency.

Once you have invited your printers they will receive an email to create an account. Contact eLynxx Solutions if you would like more printers to be available to you.

# Dashboard

## Overview

After logging into PrintGizmo, you will see the Dashboard and links (top right corner).

**PrintLynxx:** Customized printed products. 

**Printer Product Price:** Display of price ranges from various printers on various products. 
**Note:** This is for retail prices only

**The dashboard displays:** In the center of your screen, you will see Orders, Users, Departments, Products, Templates, Addresses, Quotes, Invoices, Personalize, Organization Profile, Inventory, Orders, Products, Templates, and Broker Settings.

Next displayed is general information about the broker, recent orders and recent users.

The column at the left of the screen displays other areas in the system to be accessed. From that list you can access: Orders, Quote Management, User, Organization Management, Products and Prices, Templates, Content Management, Store Personalization, Designer Studio, Reports, Admin.
**Note:** All options may not be applicable.

# Broker Settings Tab **(Top Navigation Menu)**

## Assign Product to Printer

*Broker Settings > Product Printer Assign (Tab)*

**Note:** This may or may not be applicable.

**Assign Printer:** Select the printers from the dropdown list to assign this product to.

**Default Printer:** Select the default printer that this order should be assigned to.

**Note:** Option of lowest price printer is available if you do not have preference.

## Set Product Pricing Options

*Broker Settings > Product Price Setting (Tab)*

**Price Settings:** Two options available via radio buttons.

> **Own Rate Card:** Select this option if you would like to provide your own rate card on your products.
>
> **Markup:** Select this option if you would like to markup by Percentage Markup and/or Fixed Markup (dollar amount)

**Set up Markup For:** Select the organization you would like to setup or edit pricing for. **Note:** This option is only available if Markup is selected.

**Percentage Markup (%):** Enter the percentage you would like a product marked up

**Fixed Markup ($):** Enter a fixed dollar amount you would like a product marked up

**Radio Button Options for each Product:**

> **Specific Printer Price:** This option will have the price be based off of a specific printers price that you select on the following tab (Product Printer Assign) whether that be the lowest printer or a specific printer. The markup you entered will be based off this option.
> **Average Printer Price:** This option will calculate the average price for all the printers for a particular product. The markup you entered will be based off of this calculation.

## Set Payment and Tax Information

*Broker Settings > General Setting (Tab)*
**Payment URL:** enter your payment url here so the customers can link directly to your payment page.

**Payment Note:** Insert a note if you have any instructions for you customers to follow.

**Tax Setting:** Assign any states that you will need to collect tax.

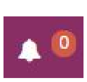
# Orders

## Active Orders

*Orders > Active Orders*
Summary of the orders, user contact details, billing amount and more. Each time a user places an order, a new order ID is automatically generated and is never repeated. Orders that have exceeded their due date will indicate as such.

You have multiple ways to search orders such as, name, email ID, order status, duration, branch, pickup branch and more so that you quickly find what you are looking for. You can filter by traits to specifically get to the order type you are searching. Rest your cursor over an icon or refer to index at the bottom of the page.
**Note: Order Approval:** Two options, **Auto Assign:** In this case the order will be automatically assigned to the default or lowest priced printer for that product. Note: When auto assign is selected as soon as an order is place by a customer it will be directly assigned to the printer. **Manual Assign:** This is the default setting for all new users. In this case the broker admin user will have to assign a printer to the job manually. This can be found in *User > Website Users > Action Menu > Edit > User Settings (Last Section)*.

**Multi-Action (left side of screen):** To take the same action for all orders, click the checkbox then submit.
You will receive **notifications** for new user orders in the top right side corner of admin panel on this the icon.



### Action Menu (right side of screen)

**View/Update Order:** This section enlists 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 raised for the particular order related actions. If Printer Module is enabled, from the Action dropdown list, you can assign a specific product order to printer. 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. Furthermore, the due date that you set here 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 also seen under Payment and Shipping. View Approve Order Cancellation Request with predefined reason or Reject Order Cancellation and update desired status from the drop down. Using the **Action Menu (right side of screen)** you have the ability to do the following: **Assign Job to Printer** and notify them with notification and comments. **Modify Order** where you can modify design, quantity, price, and add a new product to the order. The other options can be found in all action menus in this section.

**Download Invoice:** Instantly generate a PDF of the invoice.

**Download File:** Instantly download a file of the order.

**Download Job Ticket:** Instantly download a PDF job ticket.

**Impose Order:** If you have the ability to print you can impose an order.

**Export Orders:** Export all the orders by clicking on Excel Icon Top right corner above Action.

## Payment Request

*Admin > Orders > List Orders > Payment Request (Top Right Link)*
This section allows you to raise payment request for orders modified with additional options or higher quantity. Enter the details in the given fields and click 'Save'. The customer will receive the notification in his/her My Account and make payment from there.

You can view the list of orders for which payment request has been raised. From the Action Menu dropdown you can send reminder to the customer and carry out other actions as well.

**Paid Notification:** When the customer makes payment for payment request generated by you, you will receive the notification on the top right side corner of admin panel.

## 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.

## 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

**Coupon Code:** The text you insert here is what customers will have to enter to use the coupon.

**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*

This section allows you to manage orders marked as archive. You can move orders to archive for which no further process is action will be required, but for which you wish to save for future reference. Moving orders to archive reduces the clutter under List Orders section.

**Multi-Action (left side of screen):** From the dropdown list at the top right choose an action and click the orders on which you wish the action to be taken. To take action on all orders at the same time, click the checkbox, then click Go.

### Action Menu (right side of screen)

**View/Update Order:** This section enlists 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 raised for the particular order and its actions. If Printer Module is enabled, from the Action dropdown list, you can assign specific product order to printer. 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 Base and Quantity Based shipping methods, tracking number is to be filled manually. Moreover, the due date that you set here 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 also seen under Payment and Shipping, Approve Order Cancellation Request with predefined reason or reject order cancellation and update desired status from the drop down.

**Restore:** Restore order to Active Orders from Archive Orders.

**Download Invoice:** Instantly generate a PDF of the invoice.

**Export Orders:** Export all the orders by clicking on Excel Icon Top right corner above Action.

# Quote Management

Online and offline quote form/area. For Offline the broker would have to input their quantity, printer cost, percentage markup (%) and fixed dollar amount markup (if any), in return that will calculate the price that they would want to charge a customer. Underneath total price is a link to the online calculator to view lowest priced printer based on various attributes.

## 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)

*Quote Management > View Quotes*

**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 demanded 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'.

Below you are able to enter your price, product weight, and production days offline based off of the quantity requested. Under Price you may click “Online Price Calculator” that is in blue. This will a means to see what you have price the fixed quantities at.

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 so as to avoid any chances 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.

**View Quote:** You will see this option only for those quotes which are either completed or rejected. It's a quick link to view the history of quote details.

**Delete:** 2-step confirmation to delete the selected quote. Those with status of Quotation Approved cannot be deleted from here.

### Add New Quote

*Quote Management > View Quotes > Add New Quote (Top Right Button)*

Just like a storefront user can request a quote using the quote form on your storefront, you can add a new quote on behalf of your customers using the 'Add New Quote' screen. All the fields in the form will remain the same as in the regular quote form which is displayed to the storefront users.

### Help

*Quote Management > View Quotes > Quote Flow (Top Right Button)*

'Help' link is a pop-up showing flow chart of how quote process works, from the time customer places the quote until the time quotation gets marked as completed or rejected.

# USER

## Website Users

*User > Website Users*

Here you can view other details about a user, their spend limits and current balance. A user can also be assigned a manager level status. Under User Details, organization user details are displayed in this format, User Type: 'Company name' – ['Department'].

**Status:** By clicking the circle user ability to take some actions can be turned on and off. Green allows a user to place orders and access their 'My Account'. Red restricts a user from placing further orders. Changing a user status to inactive does not delete their history.

## Action Menu (right side of screen)

**View:** View a selected user’s profile such as number of orders placed by the User, Templates, Quotes, and how many times the user has logged into the system.

**Edit:** View and edit a User’s profile and other details about the user.

**Access Roles:** Manage the rights of a user.

**View Orders:** View all orders placed by the user.

**Edit Profile:** Ability to edit user profile if applicable.

**View Templates:** Displays a thumbnail image and details of all the templates created by the user.

**View Quote:** Lists quote requests made by a user plus a link to manage quotes. Further explanation can be found in the View Quotes section.

**Manage Address:** Here a user can add an address manually. Edit option are also available under Action.

**Login as User:** View a user’s My Account exactly as this user would see it. From this location you will be able to perform actions on their behalf (placing new order, editing existing orders, etc.). Logout when finished.

**Delete:** Take caution before performing this 2-step function, as this action will permanently delete the user account, his/her images saved in My Account, and templates and quotes placed by the user.

## Extra Fields

*User > Website Users > Extra Fields (Top Right Button)*
This function allows extra fields to be added to the user sign-up form. Additional fields can also be added to an order invoice. The extra fields will appear in the registration form, address book, and on their profile page in My Account.

## Add

*User > Website Users > Add (Top Right Button)*
Create a single website user here. When ‘Save’ is clicked, the new the user will automatically receive an email with their My Account credentials, unless Send Notification option is unchecked. Using these credentials, the new user can login to update their account information, change password and place orders.

**Below is the description of important fields:**
**User Type:** Default user type is set as regular broker user. If you have previously added broker users, then you can choose the company name or department from the drop down menu.

**Allow Tax Exemption:** Clicking this box will set the tax amount as zero for this user, even if they meet the tax rule.

## Import

*User > Website Users > Import (Top Right Button)*
Follow the instructions there and click Import to create multiple users’ My Account at the same time.

### Import Address

*User > Website Users > Import Address (Top Right Button)*
**To mass upload user address details, simply follow these step by step instructions.**

**Step 1: Download Sample File**
Once you download the sample file, you are required to enter details in the sequence of the tabs.
**Note following points to avoid wrong or omitted product entries into the system:**
Do not delete or interchange any column in the sample excel file
Do not change title of any column
For clarification about any column title, see Step 2
For broker_id of specific broker user, see Step 2 > Broker Details Tab

**Step 2: Fill Up Data & Help**
Information here serves as a reference to fill in the Excel file. For example, you can see the Broker ID from here and accordingly fill in the Excel file.

**Step 3: Upload File**
Simply upload the Excel file.

**Step 4: Map Database Field**
You can check tab details which are correctly taken from the Excel file.

**Step 5: Imported Data Summary**
Click 'Import' and all the valid data will be imported into the system.

## User Templates

*User > User Templates*
This section contains thumbnail preview of all the templates created by users from your storefront. Also, you will find quick links to user's detail page, information of product for which template is created, download template file, edit design and delete templates.

Templates created by website users will display in this section even if the user is checked out. On the other hand, when a guest user checks out, their templates will be automatically deleted from this section and will display in List Orders section.

### Action Menu (right side of screen)

**Edit Design:** Edit the graphics or text of the template on the user's behalf. Clicking on Edit Design will direct you to Online Designer Studio where you can make and save the required changes.

**Download file:** Download high-resolution print-ready PDF file of the template.

**Delete:** Permanently delete templates that are no longer needed.

# Organization Management

## Organization

*Organization Management > Organization*
Easily manage the details of your organization’s users. This contains resourceful links to create organization users’ private store, personalize with their branding, set order approval process, and much more.

### Add

*Organization Management > Organization > Add (Top Right Button)*
Create an organization here. Fill out required fields and toggle on and off the options available to how the organization is supposed setup.
**Note:** At the bottom of the “Settings” section you can choose how Printer Order Assignment is handled in the system. **Auto Assign:** In this case the order will be automatically assigned to the default or lowest priced printer for that product. Note: When auto assign is selected as soon as an order is place by a customer it will be directly assigned to the printer. **Manual Assign:** In this case the broker admin user will have to assign a printer to the job manually.

### Action Menu (right side of screen)

**Dashboard:** View brief summary of selected organization, along-with some important links to orders, users, etc.

**Edit:** Modify existing details of your users. This contains a direct link to the admin panel of that a user. Default selection of billing/shipping address will only appear if billing/shipping address is fixed. Your user can also edit the details from organization admin panel.

**View Users:** View details of users/employees that have been added from Website Users or from their admin panel. Various other actions are available from here such as View Orders, Templates and more.

**Departments:** Toggle Departments on and off as well as add new (top right-hand corner add button). Edit option is also available under Action.

**Manage Address:** Toggle an Address on and off depending on what is needed for the organization. Here a user can add an address manually. If the address is already in a spreadsheet then a user can click Import Address (top right-hand corner Import Address button). Edit or delete options are also available under Action.

**Personalize Store:** Organizations have the ability to personalize their own pages to change the existing system and make it their own. Various items can be changed such as text, format, colors, logos, and CSS.
**Note:** *Custom CSS:* Admin can Overwrite Default Theme CSS for particular organization.

**Inventory:** Here you can set up inventory for products which are assigned to respective organization. Further details on this are covered under Inventory section.

**Organization Profile:** Store profile is a form that you can create using various form fields for your organization users on the basis of individual organization or its departments. This form will be available for all users belonging to selected organization in their ‘My Account’. The data a user enters in this form shall be used for PDF Block personalization.

**Invoices:** Review the invoice of more than one order for your organization users, and, change the status of the invoice from 'Unpaid' to 'Paid.'

**Broker Settings:** Configure setting to how you want pricing handled, assignment of products to specific printers, and payment URL and notes, and any tax information.

## Actions for Organization Profile

*Organization Management > Manage Address (Action Dropdown right side of screen) > Add Address*

**Edit:** Modify the details of the address by clicking Submit. Changes will take immediate effect for that particular address of the organization only.

**Delete:** Delete the address.

**Note:** After creating address you can set default address at Edit Organization screen. Also, a default address can be set for a department in Edit Department screen.

**Address Type:** Gives option to set up a common address, or, set up separate billing and shipping addresses.

**Office Name:** Applicable to organizations with multiple offices. Assign a unique identity and language.

To mass upload organization user address details, simply follow the step by step instruction mentioned there.
Following is a brief highlight for each of the steps:
*Import Address (Organization Management) > Manage Address (Action Dropdown) > Import Address(Top Right Button)*

**Step 1: Download Sample File**
Download the sample file. Enter details in the sequence of the tabs.
Note following points to avoid wrong or omitted product entries into the system:
Do not delete or interchange any column in the sample excel file
Do not change the title of any column
For clarification about any column title, look up in Step 2
For organization_id of specific organization user, look up in Step 2 > Organization Details Tab

**Step 2: Fill Up Data & Help**
Information here serves as a reference for you to fill the Excel file. For example, you can search by the Organization ID and accordingly fill in the Excel file.

**Step 3: Upload File**
Upload the Excel file.

**Step 4: Map Database Field**
Check tab details which are correctly taken from the Excel file.

**Step 5: Imported Data Summary**
Click 'Import' and all the valid data will be imported into the system.

The section lists all existing form fields created for store profile along with details like field title, field type (Option), default value, block name for which particular field is applicable for personalization. Below is the description of some important fields that appear while adding or editing store profile form fields or field groups.

**Block Name:** This will be the PDF Block name which will be linked to the given form field.

**Type:** Choose various field types to store profile like textbox, radio button, dropdown, text area, upload file and date picker.

**Field Group:** Use to separate available form fields into different field blocks or groups, and, to make the user interface more systematic and meaningful.

**Personalization only:** When-active (green) the field will be available in personalization profile page for you to enter required data. When inactive (red) then the field will be available in the organization profile page for the user to enter required date.

**Fields Listing:** Use 'Per Row Single Field' for users to see just one field in each row and 'Per Row Two Fields' for user to see two fields in each row of the store profile form.

### Personalization Profile

*Organization Management > Organizations > Action > Organization Profile > Personalization Profiles (Top Right Button)*
Create multiple profiles and departments which can be selected by the user for template personalization. Only you can add as many profiles as required for the user. The user can only select, not edit the profile information.

**Approval Rules:** Auto-approve organization orders based on various rules that you are able to define which can be department specific, user specific, product specific, or based on specific condition applied on order amount like equal to, greater or equal to, less or equal to.

**Invoice:** Create an invoice for more than one order for your organization users, and, change the status of an invoice from 'Unpaid' to 'Paid.'

Two Tabs appear - 'Created Invoice' and 'Paid Invoice'. Each display the invoice number along with the order number on which invoice has been created. The total of all the orders grouped in the invoice will be displayed. To create/add new invoice, click 'Add' Button (Top Right Corner). Orders will be displayed for which the invoice has not been created. Select the orders on which you want to create an invoice. Click on Generate to generate an Invoice Number. To change the status of an invoice from 'Unpaid' to 'Paid' click on Edit icon, enter some notes, and click on 'Paid.' The invoice will be displayed in 'Paid' tab along with all the details. An organization user will be able to check the status of the 'Created invoice' and 'Paid invoice' from their admin panel.

## Departments

*Admin > Organization Management > Departments*
Lists only those organization accounts for which Department module is enabled. Under Departments, details are displayed in this format, 'Account Limit, Company name' – ['Department'].

**Account Limit:** Displays the credit limit allotted to that particular department of an organization.

**Status:** By clicking on green or red you can instantly toggle the status as either active or inactive.

### Action Menu

**Edit:** Allows you to Select the Organization, Edit department, and set an Account Limit.

### Add

*Admin > Organizations > Departments > Add (Top Right Button*)
Create departments for your organization customers. Under Organization dropdown, only those organizations for which Department module is enabled will be listed.

## Inventory

*Admin > Organization Management > Inventory*
Set up inventory for products.

**Below is the description of important fields:**
**Min Print Qty:** Minimum required quantity at order time to allow inventory option.

**Min Ship Qty:** Minimum required quantity for shipment request.

**Cost Per Print Unit:** One time inventory storage charges, applicable at time of order.

**Shipment Handling Cost:** Charges will be applicable for each shipment request; leave blank for no charge.

**Storage Days:** Maximum days for allow shipment request; leave blank for no limit.

**Save:** Save configuration setting for that respective product.

# Products and Prices

## Print-to-Order Products

*Products and Prices > Print-to-Order Products*
This section allows you to manage all your products.
**Note:** After enabling or disabling Products, refresh your webpage to confirm changes on the storefront.
**Note:** Pricing Methods are Own Rate Card, Lowest Price, Average Price, and/or Mark-Up Pricing based on a dollar and/or percentage amount. Note: If printer has not selected a default printer for the product the system will have to look up lowest priced printer. If only one printer is assigned to that product but they have not input a price users will not see a price and will be unable to order that product.

## Action Menu (right side of screen)

**Note:** Options below will only be available if you have made the product. Find more explanation on each of the following under Add Product.

**View:** Display all details related to this product; i.e. Total Orders Amount, Additional Options Used, Additional Options Rules, Settings etc.

**Edit:** Edit basic product details.

**Designer Option:** View price for Retail, both for total broker or a particular broker. Search to view price for Additional Options if created.

**Quantity:** Select to view the price for Retail; for total broker or for particular broker. Search and view the price for Additional Options if additional options have been created.

**Additional Option:** Add or edit additional options from top right button.
**You can categorize additional options up to 2 levels:**

- Additional Option Group
- Additional Options

**Action Dropdown:** Edit, Duplicate Additional Option, and Delete.

**Option Rules:** Rules for additional options.

**Meta tag:** Edit Meta Tag details for this product.

**Gallery:** Upload multiple images of this product which will display on your storefront when your customer opens this product page.

**Mask Image:** Upload mask image for this product. When your customer chooses to personalize this product using Custom Design option, the Online Designer Studio will open with the mask image rather than a blank canvas.

**Help Template:** Upload a file that shows the safe margin, cut edge, and bleed of the product in its actual size for purpose to download as a design guide.

**Settings:** Enter setup cost, default font size for product, PDF preview, Orientation, Upload, and Product Label Personalization. **Note:** Enable multiple file upload under the "Allow Multiple File Upload" toggle if needed.

**Duplicate Product:** Make a duplicate of the product.

**Preview Images will open. Some of the important fields are described below:**

**Allow Edit On Additional Option Page:** Use this option to allow/disallow customer the ability to change the selection of Additional Options after saving the product design in studio.

Using ‘Hide Product Pages’, set rules to hide specific product pages based on additional option attributes selected by customer on storefront.
Using ‘Designer Preview Images’, upload preview images (mask images) for each size and page of the given product based on additional options configured. (Useful for products like brochures where you have a variety of fold types for same product size, and, you want to display such fold types in Designer Studio with proper visualization by uploading a mask image for each fold type).

## Add

*Products and Prices > Print-to-Order Products > Add (Top Right Button)*
**Adding a product is a multi-layer process which includes:**

- Adding Basic Product Details
- Setup Product Sizes
- Update Meta Tags
- Adding Basic Product Details

**Note:** When you add a product it only becomes a default product. When setting the product up you may assign the product to organization(s) if you wish.

Begin with adding the basic details about the product. If you have multiple languages enabled, you need to manually enter the translated content.

**Product Name:** Assign a name to the product

**Product URL:** By default, the product name will be the product URL. Any spaces in the product name will be substituted with a dash. However, you can completely modify the URL as well.

**Default Category:** A category the product has been assigned.

**Associated Category:** Another category the product has been assigned.

**Price Defining Method:** Multiple pricing defining methods are available. When you choose the option of Size Based Price (Dynamic Size), a new option, Type of Measurement, will be displayed.

**Sheet Calculation:** Enable product price to be calculated based on the sheet used for printing.

**Sort:** The order in which the product will be displayed.

**Status:** Option to toggle the product on or off on the front end.

**SKU:** If SKUS are being used, enter here.

**Product Type:** Select different upload options you want to enable for the product from Browse Design, Upload Center, Custom Design, Quote Request and Hire a Designer. The order of the product type can be changed by drag and drop after clicking on the arrows in left side of the box.

**Specific Organizations:** Select the customer type for whom you want to enable this product. When you select Specific Organization And Retailer, a list of all the broker customers and retailers will appear. Click on a specific broker customer, retailer, or both to enable this product.

**Select Printers:** Select the printers you want this product assigned to.

**Default Printer:** Select the default printer a product is assigned to when it is order by a user or you may select lowest priced printer.

**Percentage Markup (%):** Enter a percentage you would like to markup the printer's price to be charged to the user. If you do not want a percentage simply leave it blank or enter zero.
**Note:** Enter one type of markup to ensure you do not sell products at cost.

**Fixed Markup ($):** Enter a dollar amount you would like to markup the printer's price to be charged to the user. If you do not want a dollar amount simply leave it blank or enter zero.
**Note:** Enter one type of markup to ensure you do not sell products at cost.

**Type of Color Palette:** Allows a choice for type of color palette to offer for your products in Designer Studio.

**Production Days:** The number of days you set here will be used for calculation of due date in List Orders. For example, if you enter 5 days, when a customer places an order for this product, the system will automatically calculate 5 days from the day of order and display it as Due Date in View Orders.

**Product Description:** Insert images and descriptions to explain your product.

When finished, click save and continue.

## Setup Product Sizes

This interface allows you to manage product size options. These options will display on your storefront in the Online Price Calculator, Upload Center, and Online Designer Studio. Set weight for the product by using the link in the top section. More explanation is available in the Product Weight-Days section.

**Title:** This is the product size label which will display on the Online Calculator dropdown of your storefront. This information will also be displayed wherever product size is mentioned.

**Size:** These measurements to be used on your Online Calculator.

**Fold Options:** You are required to enter the number of folds for this product. Number of folds is same as the count of fold lines on the product. See example from the Help icon.

**Orientation:** The direction for product layout.

**Sort:** The sort order for the product.

**Active:** Toggle to turn on or off.

**Default:** Radio button to mark a default size.

## Setup Product Margin

The safe and cut margin measurements you enter here will serve as a guideline for your customers to design within the safe area of the template or canvas on Online Designer Studio. The Help icon will show you how the safe and cut margin will appear to your customers. This option will not display for products for which a pricing method was chosen as Size Based Price (Dynamic Size).

**Setup Product Pages / Sides:**
Enter the number of printed sides for this product. For example, a standard business card will have two sides; i e, front and back. Click on Add New Page at the top right to add new field for setting number of page sides.

## Add Additional Options

Allows adding additional options to offer to your customers. From the Action dropdown, carry out related functions such as edit details, edit price, duplicate or delete.

**Description:** Add Additional Options from the link on the top right. Additional options can be in the form of text, image or video. Some of the important fields are described below:

**Select Option Group:** Additional option groups that you have added from Edit Additional Option in Action dropdown will display in this list.

**Type:** Select the field type for additional option such as: TextBox, Radio Button, Drop Down, Text Area, Check Box, Upload File, TextBox - Price without multiplication, TextBox - Price with multiplication.

**Difference between the three types of TextBox fields are as follows:**
**Text Box:** Only text can be entered, no calculation is possible if this option is selected.

**Text Box – Price Without Multiplication:** Only numeric value can be entered: price calculation will be done based on quantity and attribute option entered in the range (up to). For example 5(Additional Option Price) * 100 (Product price) = 500

**Textbox – Price with Multiplication:** Only numeric value can be entered; price calculation will be done based on quantity and attribute option. Price will be multiplied by the value entered in the range (up to). For example 5 (Additional Option Price) * 50 (No of pages) * 100 (Product Price) =25,000.

## Manage Designer Rules

Products and Prices > Print-to-Order Products > Action dropdown > Additional Options > Manage Designer Rules (Top Right Button)
After configuring all product additional options, set rules for additional options applicable for Designer Studio. Click ‘Manage Designer Rules’ link; see a page with two tabs called 'Hide Product Pages' and 'Designer Preview Images’ Using ‘Hide Product Pages’, set rules to hide specific product pages based on additional option attributes selected.

# 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.

See a list of all predefined products, size variants, stock available and user type to whom products are available. Products can be toggled on or off . If the product is a default from PrintGizmo then you will not have the option listed below.

## Action Menu (right side of screen)

**Note:** Available only for products you created. If the PrintGizmo software created the product, you will see only '----'.

**View:** See display of all details related to this product for total orders amount, additional option used, additional options rules, settings etc.

**Edit:** Edit basic product details.

**Product Size:** Define or edit the size of the product.

**Quantity:** Select to view the price for Retail, for total broker or for particular broker. Search and see the price for Additional Options if any have been created.

**Additional Option:** Add / edit additional options.

**Option Rules:** Rules for additional options.

**Metatag:** Edit Meta Tag details of this product.

**Gallery:** Upload multiple images of this product which will display on your storefront when your customer opens this product's page.

**Stock:** Edit product stock details configured for particular predefined product.

**Upload Print Ready Files:** Upload a print ready file which will serve as the final print ready file for the particular predefined product.

**Settings:** Enter setup cost, Product Promotional text and Product Label Personalization.

**Duplicate Product:** Make a duplicate of the product.

**Delete:** Permanently delete a product with a 2-Step process.

## Add

*Admin > Products and Prices > Predefined Products > Add (Top Right Button)*

**Adding a product is a multi-layer process which includes:**

- Adding Basic Product Details
- Setup Product Sizes
- Meta Tags
- Adding Basic Product Details

**Enable Stock Management:** Manage inventory levels; when finished, click 'Save & Continue'.

## Setup Product Size

Follow same process as Setup Product Size for Print-to-Order products.

**Title:** This product size will display on the online calculator dropdown of your storefront. This information will also be displayed wherever product size is mentioned. Enter size as small, medium, large, etc.

**Size:** Measurements to be used on your online calculator.

**Customer Type:** When you select a specific broker or retailer, a list will display of all broker customers and retailers. Enable the product for a specific customer type.

## Set Retail Price

Pricing table options for this product will display based upon Price Defining Method setup. To add new rows for pricing, click on the Add New Price Link at top right. Prices for various quantity levels can be set in Fixed Quantity & Price. For products identified as Range Base with/without Multiplication, enter your quantity range and pricing in the appropriate fields. Refer to Product Price section for more explanation.

If this product is assigned to Broker Customers or Both (Retail & Broker customers), the next step will be Set Broker Price. **Note:** If you would like to markup price by dollar amount and/or a percentage please use the method below. If you configure a price using your own rate card you may be charging less than what it cost to produce the item.

## Set Broker Price

**This interface allows you to set broker pricing from Select Broker dropdown in two ways:**

**Common Price for All Organization:** Pricing set here will be applicable to all broker customers.
**Note:** This will be named as the broker

**Individually for each Organization:** Select the Organization name from the dropdown list. Enter pricing applicable to all departments in that broker. To set individual pricing for multiple organization customers, go to Product Price. Enter prices and save changes. If stock management is enabled, the next step will be Manage Stock Account History. Otherwise, you will be redirected to Update Meta Tags.

## Manage Stock Account History

From Stock/Remove Stock enter/submit the current quantity of this product. The adjusted stock quantity will display under Stock Summary. The stock quantity will adjust automatically following customer orders (if notifications have been set up). To edit the stock notification, go to:
*Admin > Content Management > Search with "stock" > Action dropdown > Edit*
Search previous records from the table below. Stock history can be exported to Excel.

## Update Meta Tags

Enter SEO-friendly content for Page Title, Keywords and Description. If you have multiple languages enabled, manually enter the translated content. Save the changes to move to next step - Additional Options. If this product has no additional options, then simply Save Changes and the product is created.

## Add Additional Options

This interface allows you to add the additional options that you offer to your customers. From the Action dropdown you can perform functions such as edit details, edit price, duplicate or delete.

**Description:** Add Additional Options from the link on the top right. Additional options can be in the form of text, image or video. Some of the important fields are described below:

**Select Option Group:** Additional Option Group that you have added from Edit Additional Option in Action dropdown will display in this list.

**Type:** Select a field type for additional options such as: Text Box, Radio Button, Drop Down, Text Area, Checkbox, Upload File, TextBox- Price without multiplication, Textbox - Price with multiplication.

**Difference between the three types of Text Box fields are as follows:**
**Text Box:** Only text can be entered, no calculation is possible if this option is selected.

**Text Box – Price Without Multiplication:** Only numeric value can be entered: price calculation will be done based on quantity and attribute option entered in the range (Upto). For example 5 (Additional Option Price) * 100 (Product price) = 500.

**Text Box – Price with Multiplication:** Only numeric value can be entered. Price calculation will be done based on quantity and attribute option. Price will be multiplied by the value entered in the range (up to). For example 5 (Additional Option Price) * 50 (No of pages) * 100 (Product Price) = 25,000.

**Kit Product:** View products that are sold as kits. This option can be toggled on and off.

# Templates

**Note:** If you would like to make a template specific to an Organization you must login as that Organization and create the template that way.

## Product Templates

*Templates > Product Templates*

This section allows you to create, edit and delete templates which are created using Online Designer Studio (HTML based Studio). Search specific product templates using various filters at the top. Each template has a preview icon which allows you to get a complete preview as popup based on PDF size of the product template.

**Note:** There are two options underneath this section

**Note:** If you would like to make a template specific to an Organization you must login as that Organization and create the template that way.

### Action Menu (right side of screen)

**Note:** The action menu will only be accessible on templates you have created.

**Edit Info**: Modify details associated to this product template. Save any changes made in Select Product. The system will automatically resize the current design to the edited size.

**Additional Preview Images**: To preview a current template image separately upload the additional image. The preview image you upload will be applicable for both admin panel and storefront, and will be displayed in the template category.

**Edit Design**: Make design changes in the template after being redirected to Online Designer Studio.

**Manage Blocks:** Assign the guide text that best fits your broker.

**Manage Template Properties**: Assign properties created from Template Properties Master. By assigning the template properties user shall only see the applied fonts, colors and images at storefront for particular template.

- **Fonts:** Choose default option for no change to font. Choose any font property from property master or create your own with the custom option. All options allow font changes.
- **Colors**:Choose default option for no change to color. Choose any color property from property master or create your own with the custom option. All options allow color changes.
- **Images**: Choose default option for no change to image. Choose any image property from property master or create your own with the custom option.
- **Product Options**: Bind product additional options for this template. By applying this, a user is unable to make change to additional option at storefront.
- **Settings**: Set settings such as Templates Tab Enable, Orientation of Studio, Text Customization and Studio.

**Preview**: Preview template at storefront.

**Create New Version**: Duplicate template by editing the pre-filled fields and modifying the template design.

**Delete**: To permanently delete a product template, follow the 2-step confirmation.

# Content Management

## Contents

*Content Management > Contents*
This section allows you to categorize the content with respect to dynamic and fixed content which displays on the storefront within content pages, sidebars or footer. Using the 'Select Broker' drop-down on the top left, a list will display of the content added by either the 'Default' pages or 'Your Pages' (you created). The 'Default' content displays when you enter the page.

### Dynamic Pages

*Content Management > Contents > Dynamic Pages (in Page Type dropdown)*
These pages are used on the storefront by creating links with content pages or HTML content. Any content page you add will be added in Dynamic pages. You cannot delete default dynamic pages. You can toggle Dynamic Pages status as Green (Active) or Red (Inactive). You can also check preview of these pages from Preview Link.

### Action Menu (right side of screen)

**Edit:** Edit page heading, page URL, page content and SEO Content for Dynamic Pages.

**Set Link:** Toggles Links - Header / Footer section.

### Fixed Pages

*Content Management > Contents > Fixed Pages (in Page Type dropdown)*
These pages are used on the storefront by means of block as inner pages which cannot be deleted. Fixed Pages status can be toggled to Active or Inactive.

### Action Menu (right side of screen)

**Edit:** Edit page heading, Page content and SEO Contents for Fixed Pages.

## Banners

*Content Management > Banners*
View banners available on storefront. Click the add button to create a banner, title the banner, upload image, and enter text for banner. On main page, toggle status to make active or inactive.
Banners can also be displayed for specific products or product categories.

### Action Menu (right side of screen)

**Note:** Only banners you create will have these options.
**Edit:** Edit the banner design.

**Delete:** Delete the banner.

# Email/SMS Notifications

*Content Management > Email/SMS Notifications > Email Notifications*
You can manage different kinds of emails in your system from this section. You can send and receive emails from multiple recipients. You can edit the content of different emails by creating a new copy, the copy will be used instead of the original. Your system comes pre-built with default email templates which are sent to your customers and received by you as admin.

# Links - Header / Footer

*Content Management > Links - Header / Footer*
This section allows you to edit, add, delete, activate and deactivate links that appear in the header (where the navigation menu appears across the top of the page), top header (where the user name appears, above the navigation menu), footer (across the bottom of the page where the copyright information appears), or in a sidebar menu, if any are used in your broker's page theme.

An broker admin can make these changes to the links that are specific to the broker's own page theme. The only action an broker may take on master, or default links, is to duplicate to the broker's page theme for further use and editing.

To view broker specific links, select Broker Links from the first drop down menu. To view master, or default links, select Master Widgets from the first drop down menu. Choose option to print or export to Excel.

## Action Menu (right side of screen)

**Duplicate:** Duplicate links for your broker's page theme.

# Sidebar Management

*Content Management > Sidebar Management*

# Sidebar Management (sub-category)

*Content Management > Sidebar Management > Sidebar Management*
Customize what appears on the sidebar whether it be the left, right, or both. Click the pencil symbol on sidebar to edit selected contents. Click the 'Save' button if you have made changes.

# Sidebar Widget (sub-category)

*Content Management > Sidebar Management > Sidebar Widget*
Toggle sidebar widget active/inactive to give more feature customization.

## Action Menu (right side of screen)

**Edit:** Edit the title, position, and display setting of the widget.

# Store Personalization

## Language Text References

*Store Personalization > Language Text References*
Interface to manage text for labels, buttons and fixed sections across your storefront. Search has a drop down list of all the modules. Select the one for which you want to change the text. Moreover, you can Search by Keyword to quickly find what you are looking for.

## Clarifying Shipping

*Store Personalization > Language Text References*
**Note:** Click the dropdown arrow next to show all.
Select Checkout, here you will be able to input a message to display to your customers how to handle shipping if they are asked multiple times.

# Designer Studio

## Studio Settings

*Designer Studio > Studio Settings*

## Language Text References (sub-category)

*Designer Studio > Language Text References*
Interface to manage text for labels, buttons and fixed sections across your storefront. Select the one for which you want to change the text. Moreover, you can Search by Keyword to quickly find what you are looking for.

## Images

*Designer Studio > Images*
This section allows you to add and manage the images that are available on your Online Designer Studio when your users choose Browse Design or Custom Design option for product personalization. A thumbnail image of all online designer images you have added will be displayed.

## Image Categories

*Designer Studio > Image Categories*
Add and manage categories; toggle category status as active / inactive. When a parent category is made inactive, all sub-categories will become inactive.

# PDF Block Fonts

*Designer Studio > PDF Block Fonts*
This section allows you to view and add fonts which are used in your PDF block templates. Before uploading PDF blocks, you can mass-upload fonts from here. Your system comes with pre-configured fonts which you can see in the listing. Any new fonts you upload are added in the same listing. All the fonts can be downloaded using the 'Download Font' link available.
**Note:** Previously-uploaded fonts overwrite with new uploaded font file.

### Add

*Template > PDF Block Template > View Fonts > Add (Top Right Button)*
Fonts you have previously uploaded here will be available while uploading PDF Block file.

Upload fonts for PDF block templates. The fonts only pre-populate while uploading the template if the template is being assigned to product for a broker in which the font is already assigned.

This means that if you upload a PDF Block template file and it has the font which is assigned to only specific broker, that font will only pre-populate while uploading the template if the template is being assigned to product for an broker in which the font is already assigned.

# Reports

## Order

Reports > Order

## Order Summary (sub-category)

Reports > Order > Order Summary
This report summarizes orders you have received. Report information can be searched in date range, order status, time duration (daily, weekly, monthly, yearly). Click on link at top to print or export to Excel. The report includes date, number of orders, price, tax, price with tax, shipping, discount and total for selected time and date range.

To view details of each order, click on the order number. A total for each field is displayed at the top of the report.

## Order Detail (sub-category)

*Reports > Order > Order Detail*
This report provides detailed information related to sales order. Report information is based on selected date range, order status and user type. This report contains Order number, Order Date, User Details, Product Details, Quantity and various price like price with tax, shipping, discount, subtotal and order total amount. Click on link at top to print or export to Excel.

Clicking Order No. link will redirect to Edit Order Page, whereas clicking on the User’s name redirects to user detail page. Total of each pricing field is displayed at the top of the report.

# Printer Review (sub-category)

*Reports > Order > Printer Review*

This report provides a detailed review of the printer. Report information is based on selected date range, status and printer, and, contains User Details, Order Details, Rating, Review Comments, Printer Comments, Status and Review Date.

# Product

Reports > Product

# Product Orders (sub-category)

*Reports > Product > Product Orders*

This report provides product sales information such as product details, product name, size, number of orders, product quantity, product price, average price and average quantity for each product. Select date range, order status and products. Click on the link at top to print or export to Excel.

# Template Orders (sub-category)

*Reports > Product > Template Orders*

This report provides template order information such as template name, product name, size, total sales, and template type. Select date range, products and template, or product. Click on the link at the top to print or export to Excel.

# Log

*Reports > Log*

# Audit Log

*Reports > Log > Audit Log*

This report provides information of activities of super admin, sub-admins and printers to whom you have assigned admin. Information is based on selection of date range and keywords. Report contains details of sections in which activities were performed, activities details, Author name and IP address and date.

Super Admin rights allow deletion of Audit log data. To delete audit log data from Delete Log Filter, select time interval or enter keywords and press show report button. Select data to be deleted and click on Delete.

Click on link at top to print or export to Excel.

# 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 that 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 broker, and admin groups for specific broker. 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.