**Copy Express Limited**



A Web To Print SaaS Solution

Final Recommendation

Presented by

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Contents

[Executive Summary 2](#_Toc369602643)

[Introduction 3](#_Toc369602644)

[Background 3](#_Toc369602645)

[Scope 3](#_Toc369602646)

[System Requirements 4](#_Toc369602647)

[Front End Requirements 4](#_Toc369602648)

[Back End requirements 4](#_Toc369602649)

[Invoicing 5](#_Toc369602650)

[CRM 5](#_Toc369602651)

[Business Process Requirements 5](#_Toc369602652)

[Methodology 6](#_Toc369602653)

[Initial Research/Investigation 6](#_Toc369602654)

[Secondary Research/Investigation 6](#_Toc369602655)

[Final Research/Investigation 7](#_Toc369602656)

[Findings 8](#_Toc369602657)

[OnPrintShop Strengths 8](#_Toc369602658)

[OnPrintShop Weaknesses 8](#_Toc369602659)

[Conclusion 9](#_Toc369602660)

[Recommendation 10](#_Toc369602661)

[Cost & Delivery Summary 12](#_Toc369602662)

[Benefits of workflow Automation and Integration 12](#_Toc369602663)

[SaaS Websites and Demo Links 13](#_Toc369602664)

## Executive Summary

Copy Express Limited offers a complete printing solution for small to medium businesses and walk in customers in Petone, Lower Hutt. Their printing services includes booklets, pamphlets, Business cards, letter heads, Laminating, Binding and specialised requests such as menus or maps. They pride themselves in their quality service with fast turnaround.

In order to support their current business requirements and improve their market share, Copy Express decided to look at making changes to the way customers are ordering their products. They want to make the ordering process quick and easy and also to automate their backend workflow process.

This led Copy Express to look for a simple, affordable, easy to use yet robust SaaS (**S**oftware **a**s **a** **S**ervice) product which will serve their business purpose and move Copy Express towards becoming a leader in the print business.

Copy Expresses current website is showcasing their products and services but doesn’t have any online ordering system where customers can design, upload or use existing designs to order their products. Their current order taking system is through email, phone based and walk-in methods, which might not be an ideal procedure to follow in future.

Their backend Workflow is not completely automated and some of the procedures are still maintained manually which allows for potential for loss of time and productivity which might hinder any business growth in future.

Copy Express requested us, a team of three dedicated IT students to research and recommend a suitable WebToPrint SaaS solution for them. To mitigate the problem and improve the business prospects of Copy Express, a thorough research and analysis of their functional, technical and various other business requirements has been carried out.

An extensive search of currently available solutions lead to the testing of the most suitable ones and following the feedback given by Peter McCarroll of Copy Express the team has recommended the **OnPrintShop** WebToPrint **Platinum Pro** solution. This is an affordable cloud hosted subscription solution which meets the majority of key requirements. Those key requirements that are not supplied can be potentially fulfilled by acquiring an add-on automated workflow module and adapting the CSV integration prototypes developed by the team.

## Introduction

### Background

Copy Express is a well-established printing solutions company delivering quality and well-designed printing solutions to many customers. Their services include designing and printing of Business cards, Flyers, Signs, Posters, Roll-Up Banners and more.

In July 2013, Copy Express engaged a group of three IT students from Weltec, Petone to conduct a current state research analysis of their system and look at potential SaaS (Software as a System) solutions that are available in the market.

The agreed approach of the team was to identify Copy Express business requirements for managing customer orders, reorders, order account management, order processing, invoice management and workflow automation on the backend and assess the options against them.

Further to the current state analysis and research, Copy Express requested the team complete an options analysis and testing of potential solutions.

### Scope

This report examines Copy Express Ltd current system status and analyses the requirements of functional aspects for the new SaaS product in detail and measures the solution to see whether the solution fully satisfying the anticipated need.

System Requirements

To provide a website with appropriate backend and possible integration with Xero that allows customers to order print jobs online and meets the budget requirement of $200 to $500 per month (depending on the quality of the solution).

### Front End Requirements

* Design – customer able to custom design their required print jobs
* Proofing – a traceable customer approval system of proposed work designed by copy express (PDF format).
* History – Customer’s previous jobs/designs available for reordering/ editing etc.
* Ordering and Reordering
* Default Prepaid Payment system – Credit card and Online banking (online banking option to delay job start and due dates until staff can acknowledge that the payment is received- staff notification of pending payment?). On-account clients should have invoices added to Xero through API with correct terms. Ideal if we could batch invoices for on-account clients so that they don’t get multiple invoices per month.
* Portal – provide semi completed templates for customer design assistance (e.g. add Logo, address) and ideally VDP**\*** dynamic capabilities for customer use.
* CRM – leads/ quotes

- clients/mailing list  
- reminders (e.g. only order 6 months of business cards; send reminder after 5 months to reorder).

-Surveys – customer feedback.

* Pricing
* Kiosk – internal access ability by staff.

### Back End requirements

* Keep good specification records – i.e. information currently recorded on the paper tickets.
* Sales/ Quote ability
* Workflow tracking– know where the job is in the process (design /pre-Press, printing, finishing, shipping) and where delays are occurring, possible notification/ alerts if job is not shipped or picked up etc. Tracking of outsourced work.
* Staff to be able to tick off the electronic ticket as work is completed.
* Allow for multiple staff accessing one ticket.
* JDF (Job Definition Format – scripting language for the printer software – used to set up for a job) output by the solution is highly desirable, especially for small jobs, but low priority.

### Invoicing

* Ideally avoid having to use the current excel spread sheet.
* Minimum requirement is an output to a CSV file better to source or code an API to Xero.
* Preferable batch processing of weekly / monthly jobs- one invoice with details of all the jobs.
* Nice to be able to track cash sales but not essential, need to at least quantify how much is going through the till e.g. Vend POS system to classify the sales.

### CRM

* Specialised/ accurate/relevant advertising e.g. Flyer printing promotions to clients that order flyers.
* Database incorporated in the online package, not custom built and maintained.

May be able to write an overlay to connect the front and back end packages together?!

### Business Process Requirements

* Identify Backlogs, where processes are not working
* Job prioritisation so that staff know what job to do next, based on due date/time but allows for overriding when necessary.
* Alerts/notifications for backlogs and overdue work.
* Ability to track revenue to specific processes i.e. design time, printing, binding, cutting and finishing. Requires staff to be able to easily load billable and non-billable times into the system. (Billable time such as Design time, Non-Billable such as Printer setup).
* Finishing charged by the minute. e.g. WorkflowMax
* Robs Design time to be booked at $60 per hour.

Methodology

The team decided to individually research and investigate about various solutions available in the market and how close they meet functional requirements of the business. In the process we visited many websites, spoke to many people that are dealing with solutions and tested many applications. The team shared their findings via Dropbox, emails and twice weekly team meetings and workshops. If a potential solution was found then the team would assess it together and present it to Copy Express for an expression of interest or elimination.

### Initial Research/Investigation

In our initial investigation the team has looked at many potential websites, made up summary charts what each and every company is offering in their solutions. The team did extensive ground level research, in the process spoke to many people had many webinars to learn and have first-hand experience of different solutions to see whether those solutions meeting our requirements.

Based on the requirements and use case list the team narrowed down the list to three possible solutions to present to the client. The team picked up **Edit and Print**, **Zeta Prints solutions** and **ePrint** to check how well these solutions can deliver and fulfil the requirements.

The team has webinars presented by the companies and tested their demo sites against each and every use case based requirement and prepared a presentation and presented the solutions to Copy Express.

The outcome of the recommendation witnessed the elimination of Zeta Prints on the grounds of lack fully editable designer studio, cost and response quality of the company.

### Secondary Research/Investigation

In our secondary investigation the team carried on further research and investigation with

Edit and Print and ePrint testing their demo sites and did another round of research to find any better solution.

The team found another solution provider OnprintShop in their research which is fulfilling majority of Copy Express’s key requirements. Incidentally the team also found out that the solution we were looking at in our initial investigation Edit and Print is extended solution partner of OnPrintShop. During our research we found out that OnPrintShop solution is having more features than Edit and Print and based on the cost/benefit analysis we concluded that OnPrintShop could be the better solution over Edit and Print.

Meanwhile the team was actively engaged in testing ePrint solution and having discussions and further research.

At this stage the team and Copy Express decided to have another meeting to discuss and narrow down to one potential solution. Both ePrint and OnPrintShop have got excellent features to offer and both are equally competitive it had become difficult to decide which one to narrow down to. ePrint was the more expensive option and although it provided a better backend workflow, it failed to match the online editing abilities of OnPrintShop.

Copy Express indicated the desire to pursue OnPrintShop solution further and engaged the team to test OnPrintShop Platinum Pro solution demo site further to check deeper whether it fully satisfy their features and how best it supports Copy Express requirements.

### Final Research/Investigation

In the final leg of investigation the entire team spent considerable amount of time testing OnPrintShop demo site in all possible scenarios. We carried out unit testing and regression testing of product set up and various price calculations.

Though OnPrintShop doesn’t satisfies the requirements fully but it can be customised to the needs and requirements (costs not quoted).

The team also spent time creating Excel VBA Macro type prototypes that would automate the upload of the CSV files provided by OnPrintShop to the Xero accounting system. The team were unable to go beyond the prototype stage as the downloaded CSV files on the demo site were not a true reflection of what Copy Express would get if the subscribed to OnPrintShop.

## Findings

The major findings of the investigation was summarised based on the solution features, cost/benefit analysis and solution provider’s services and future upgrades.

### OnPrintShop Strengths

* Good Price
* Established company, over 500 customers worldwide.
* Templates supplied
* Linked with Fotolia for online image use
* Nice customer experience, very good online design studio
* Automatically generates the job ticket
* Simple “Tick to notify customer” emails
* Social Media/Facebook integration
* Supports PDFlib files (variable text blocks)
* 24/7 Customer Support
* Quote tracking and approval system
* Future development included in monthly fee
* Easy to view previous jobs in the “My Portfolio” page, shows image of item ordered.
* Good automated online shipping quotation
* Overdue orders show up as pink in the list
* CSV upload for mail merge type orders

### OnPrintShop Weaknesses

* No job prioritisation
* No automated estimates for offline orders or quotes i.e. you add the total job price in without a breakdown of costs.
* No fields to add the paper selection etc. in the job quotes or offline orders
* Most recent Jobs at the top of the list rather than the bottom
* There is no colour indication that a job is due that day, only when overdue.
* Online editor needs flash to run. Doesn’t support phone/tablet.
* Users can only upload up to 50mb per file
* Cannot change the turnaround time from the admin site if necessary
* No Xero API integration
* No automated email reminders
* Cannot apply non Linear pricing schedule
* Cannot apply a customer discount without entering a coupon

In addition to the above findings; there have been a few upgrades to the OnPrintShop Platinum Pro solution like font upgrades, producing Job ticket and add on modules for backend work flow automation which is to the advantage for Copy Express.

## Conclusion

Considering Copy Express’s requirements and their desire to have a cloud based solution it is sensible that a good SaaS solution is the way to move forward. The ability for customers to design their own print jobs, browse supplied templates and upload the pre-prepared designs/artwork is a step forward that most local printers have not yet taken. This not only makes the process of ordering smooth but in the long run it can generate more business.

The streamlining of backend processes will provide better productivity, smooth workflow and ease of operation which will in turn improve the business experience.

OnPrintShop Platinum Pro solution can meet majority of the requirements of Copy Express and it can support future growth needs of Copy Express. There are easy upgrade options available with no hassle if Copy Express decided to upgrade at any time.

## Recommendation

After considering product specifications, product features, independent reviews and in the light of above conclusions we would like to make the following recommendations keeping in mind Copy Express current business status, technical infrastructure, budget and future growth anticipation.

We would like to recommend **OnPrintShop Platinum Pro Subscription solution** which offers the following features:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| **Features Description**   |  |  |  |  |  | | --- | --- | --- | --- | --- | | Tailor-made Web2Print Storefront | Unlimited & Categorized Products |  | tick |  | | Online Order / Reorder |  | tick |  | | Multilingual / Multiple currency |  | tick |  | | Unlimited Customers |  | tick |  | | Store Front | Predefined Web Layout With Your Logo |  | tick |  | |  |  |  |  | | Unique Branding for Online Designer Studio |  | tick |  | | Corporate Specific Branding with Customer Logo |  | tick |  | | Private Store / Corporate Management | Corporate Customer Specific Product and Price Display |  | tick |  | | Credit Management System with Prepaid & Postpaid Accounts |  | tick |  | | Order Approval process with Separate Corporate/Store Admin |  | tick |  | | Corporate Private Store with Corporate Branding & Content Mgmt \*New |  | tick |  | |  |  |  |  | | Vendor/Print Broker Module \*New | Manage Multiple Vendors |  | tick |  | | Vendor Registration with Access to Sub-Admin to Manage Orders |  | tick |  | | Quote Engine | Custom Quote for Customer Specific Requirement |  | tick |  | | Online Order from Custom Quote |  | tick |  | | Automated Invoice | Auto Generation of Invoice Email after Final Payment |  | tick |  | | View / Print Invoice from Order History |  | tick |  | | Coupons / Discount Management | Create Coupon Codes Based on Multiple Parameters & Usage |  | tick |  | | Payment Gateway | Integration with Any Online Payment Gateway Worldwide |  | tick |  | | Shipping Gateway | Integration with Any Online Shipping Gateway Worldwide |  | tick |  | | Dynamic Price Calculator | Calculates Product Cost Based On Paper Type, Lamination Style, Corners, Binding Style & Other Parameters |  | tick |  | | Social Media Promotion | Like and Share button for Facebook with comment integration |  | tick |  | | Customer can access storefront with Facebook Account |  | tick |  | | Customer can share design on Facebook for feedback |  | tick |  | | QR Code | Produce Personalized QR Codes and Use Them in Online Designer Studio |  | tick |  | | Online Designer Studio (Designer Tool & PDF Template Engine) | Convert PDF Artwork to Flexible PDF Templates (Using Adobe Acrobat 9 or Higher) |  | tick |  | | Quick & Easy Personalization of Templates in Designer Studio |  | tick |  | | Fully Functional Designer Studio to Create Artwork from Scratch |  | tick |  | | Watermarked Print Secure PDF Preview |  | tick |  | | High Resolution Print Ready PDF Files Output |  | tick |  | | Multilanguage Support in Studio including CJK Support |  | tick |  | | Upload Centre | Accept Print Ready Files from Your Customer Using Robust File Uploading |  | tick |  | | Colour Support | CMYK, RGB, & Spot Colours |  | tick |  | | Complementary Ready to Use Templates | Ever Growing Creative Template Library |  | tick |  | | Social Photo Import | Import Photos from Websites like Facebook, Picasa, Flickr |  | tick |  | | Stock Logo – Premium Content | Offer More Than 22 Million Photos to Your Customers via Fotolia API Integration |  | tick |  | | Mass Customization of Design Templates | CSV Supported Variable Data Uploading for Personalized Design |  | tick |  | | PDF/VT with Template Merging | Support PDF-VT Generation for Variable Data Printing |  | tick |  | | Online Marketing Tool - SEO | Page Title, Keyword Setting |  | tick |  | | Google / Yahoo Sitemap Generation |  | tick |  | | Meta-tags Settings |  | tick |  | | User-friendly Admin Panel | Role Based Admin Access |  | tick |  | | Order / Customer / Product Management |  | tick |  | | Content Management |  | tick |  | | Tax / VAT Region-wise Management |  | tick |  | | Sales & Customer Reports |  | tick |  | | Job Ticket \*New |  | tick |  | | Security | Isolated Customer Database & Designs at Server Level |  | tick |  | | Design Security: Watermarked Print Secure PDF Preview |  | tick |  | | Payment Before Final File Delivery, SSL Certified Transactions |  | tick |  | | Automated Daily & Weekly Backups |  | tick |  | |

<http://www.onprintshop.com/solution-features.html#.UlwnILn2-po>

### Cost & Delivery Summary

One time activation charges that includes Support and Training includes USD $1500(this would be the same for Quarterly, Half yearly and annual subscription).

Recurring costs USD $1050(Quarterly), USD $ 1995(Half Yearly), USD $ 3780(Annual) and this includes:

* Technical Support.
* Live Chat & Email support.
* 30 Pre-set Products with 5000+ Templates
* 8 hours of Solution training.
* 10GB Data Storage & 20GB (per month) Bandwidth.
* Bug Fixes.
* Product Enhancements
* All major upgrades

Apart from the above pricing had Copy Express willing to leverage their budget for one time investment of a small amount of USD $ 1000, for better backend work flow management / automation which will provide them cutting edge over their current work flow system.

### Benefits of workflow Automation and Integration

* Integration automates entire process from online order to fulfillment.
* It removes manual processes of downloading and sorting orders from storefront and putting them into workflow.
* It reduces human errors and increases efficiency.
* Automation improves turnaround time and overall productivity.
* It requires least amount of monitoring.
* Our integration does not make changes to existing workflow.
* You can configure hot folder settings and connect storefront with workflow back-end according to your requirements.

<http://www.onprintshop.com/workflow-automation.html#.Ulwvcbn2-po>

## SaaS Websites and Demo Links

<http://www.editandprint.com.au/>

<http://www.onprintshop.com/>

Storefront URL: <http://salesdemo.onprintshop.com/>  
Retail Client Email ID: [aneesh@radix.com](mailto:aneesh@radix.com)  
Retail Client Password: aneesh  
  
Admin URL: <http://salesdemo.onprintshop.com/admin/index.php>  
Admin Username: admin  
Admin Password: demopass1234  
  
OPEN THE CORPORATE URL AND ADMIN IN DIFFERENT BROWSER   
Corporate URL: <http://salesdemo.onprintshop.com/corporate/copyexpress/>  
Employee Email ID: [hema@copyexpress.com](mailto:hema@copyexpress.com)  
Employee Password: hema123  
  
Corporate Admin: <http://salesdemo.onprintshop.com/admin/index.php>  
Username: peter  
Password: peter  
  
You can also see Online Training Video for creating a Product: <http://www.onprintshop.com/Online-web2print-training.html>