



Customer On-boarding and Training Document

Training Plan

Session-1: Introduction, Front-end, and Design Studio Training (2 hours)

Part-I: Introduction

1. Introduce the support team and key stakeholders
2. Explain several support channels and their usage
3. Explain important dates: UAT Period & Free Support Period (Perpetual License Customers), Ramp-up Period & Renewal Period (Subscription License Customers)
4. Discuss contact and escalation matrix
5. Explain the complete training agenda

Part-II: Front-end Details

1. Front-end website flow and user experience
2. Manage theme template and colors from back-end
3. DIY theme editor to manage page layout and contents
4. CMS page management
 - a. Category block images
 - b. Promotional blocks
 - c. Footer changes
 - d. Content blocks, pages, widgets, blog, and blog category

Part-III: Design Studio Details

1. Explain Design Studio – Merch/Printing/VDP/Packaging/Photobook/Photo Prints Products (whichever applies to customer business requirements). Summarize how design studio features get re-organized as per different product types.
2. Explain Form-Based Quick Editor
3. Design Elements: Text, paragraph, text combinations, clipart, shapes, upload image, stock images, photo box, QR codes, name/number etc.
4. Fonts and Clipart: Supported formats, limitations etc.
5. Printable colors and color pallets
6. Design area, margins, and overlay/mask

7. Background colors and images
8. Upload images, admin images, and image stock library
9. Design templates and page layouts
10. Explain editable artwork and its the usage
11. Preview: 2D and 3D
12. Keyboard shortcuts and editing options, page browsing for a multi-page product

Session-2: Back-end Management (2 hours)

Part-I: Web-to-Print Setup

1. Various Web-to-Print Modules: Fonts, Clipart, Admin Images, Color Pallets, Backgrounds, Text Combinations, Imposition & Sheet Management, PDF Templates
2. How to create and manage personalization and production profiles and their purpose
3. How to create and manage Design Templates, Page Layouts, Editable Artwork
4. How to assign Design Templates, Page Layouts, Editable Artwork

Part-II: System Settings & Print Workflow Management

1. System settings related to web-to-print
2. Print workflow setup – Users, User Roles, Workflow Status, etc.
3. Order management and creating jobs
4. Job details, print-ready files, and order messages
5. Hot folder settings
6. Flush cache and reindexing

Session-3: Back-end Management (2 hours)

Part I: Product Setup

1. How to manage the products (printing or merchandise or specific to client business)
 - Basic settings
 - SEO settings
 - Store and category assignment
 - Pricing options
 - Custom options (Configurations for the merchandise products with different options)
 - Attachment options
 - Personalization settings
 - Production settings
2. W2P Settings (for all product types)
 - Assign background options
 - Assign design template options
 - Page layouts assignment (if applicable to product)
 - Assign fonts, clipart and editable artwork

3. W2P Settings (for merchandise products)
 - Design area assignments
 - Printing method assignments

Session-4: Back-end Management (1 hour)

Part I: Store Management

1. Store setup – language assignment
2. Catalog management
3. Design studio language management
4. Payment methods setup
5. Shipping and store locator management
6. Tax management
7. Currency management
8. Store e-mail addresses and other notification settings
9. Store e-mail templates (customer, sales and order notifications)
10. Newsletter setup
11. Marketing and promotion options

Part-II: Extras

1. Some extensions like product and order attachments, fast order etc.
2. Any additional module setup (multi-vendor, graphics designer etc.)

Session-5: Q&A (1 hour)

1. Get all your queries sorted to help you start setting up your store on your own

Self-training Videos

Please watch 5 self-training videos listed below before you attend trainings for better understanding of the system

<https://support.designnbuy.com/portal/en/kb/articles/aiow2p-training-session-1>

<https://support.designnbuy.com/portal/en/kb/articles/aiow2p-training-session-2>

<https://support.designnbuy.com/portal/en/kb/articles/aiow2p-training-session-3>

<https://support.designnbuy.com/portal/en/kb/articles/aiodw2p-training-session-4>

<https://support.designnbuy.com/portal/en/kb/articles/aiow2p-training-session-5>

Support Channels and Usage Guidelines

Zoho Help Desk	The primary channel of support as per SLA. Raise tickets for any query, assistance, and bug resolution to get a quick response as per SLA
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Support E-mail Id	Used when Zoho Desk is inaccessible. However, sometimes the e-mail gets filtered as junk/spam and may not reach the intended receipt so needs follow-up by the customer if a response not received
Skype	Access is given to clients based on their support level and priority
Phone Call	Access is given to clients based on their support level and priority

First Point of Contact and Escalation Matrix

Technical Assistance	<ol style="list-style-type: none">1. Create a support ticket at the help desk2. Send an email to support@designnbuyhq.com3. Reach out to the Customer Success Manager - csm@designnbuyhq.com
Training and Support	<ol style="list-style-type: none">1. Send an email to support@designnbuyhq.com2. Reach out to the Customer Success Manager - csm@designnbuyhq.com
Sales	<ol style="list-style-type: none">1. Reach out to your respective sales executive2. Reach out to HOD Sales – inquiry@designnbuyhq.com
Invoicing and Accounts	<ol style="list-style-type: none">1. Reach out to the accounts team – accounts@designnbuy.com2. Reach out to the Customer Success Manager - csm@designnbuyhq.com

Reference Material

- **Magento User Manual** - <https://docs.magento.com/user-guide/>