



PrintReleaf Integration

Document Revision V2.2

Introduction

EKM Insight integrates with PrintReleaf to sync paper consumption data securely and reliably for your entire fleet into PrintReleaf, automatically.

PrintReleaf calculates the forest impact and carbon emissions relating to each customers' paper consumption and provides certified environmental offsets in the form of reforestation and carbon offsets to achieve net neutral or net positive impact on the environment.

EKM Insight is an authorised Integration Partner of PrintReleaf:

<https://info.printreleaf.com/integrate-ekm>

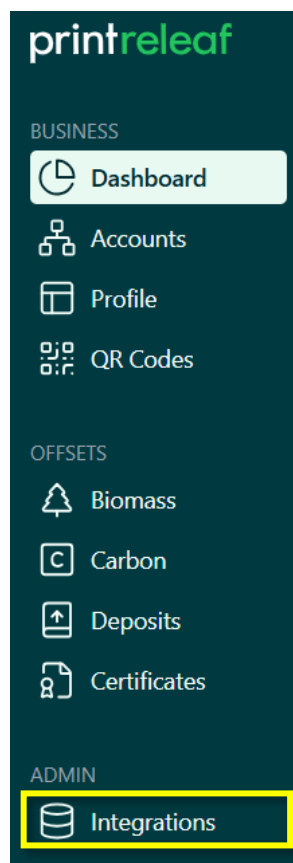
Enabling PrintReleaf at a Reseller / Customer Group Level

Before the PrintReleaf integration can be used it first needs to be enabled at a reseller or customer group level.

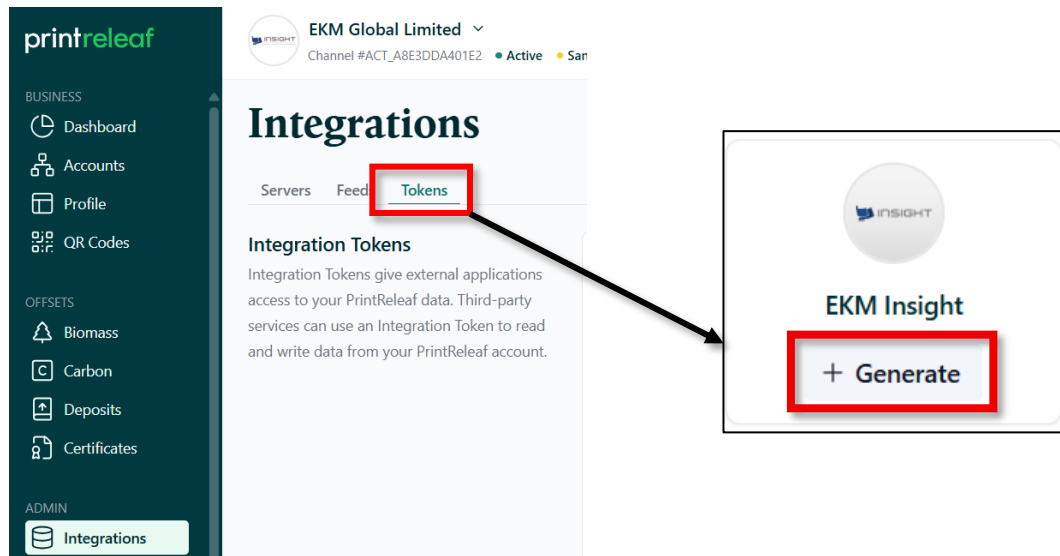
Part I: Generating the Integration Token

Follow the steps below to create an integration token in PrintReleaf that you will later copy into EKM Insight:

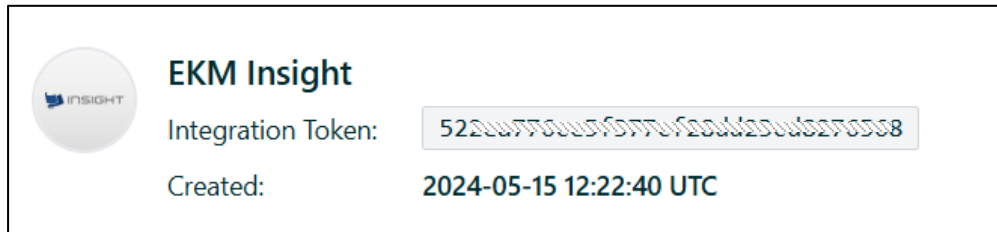
1. In PrintReleaf, navigate to **Integrations**.



- Click **Generate Token** under the EKM Insight integration.



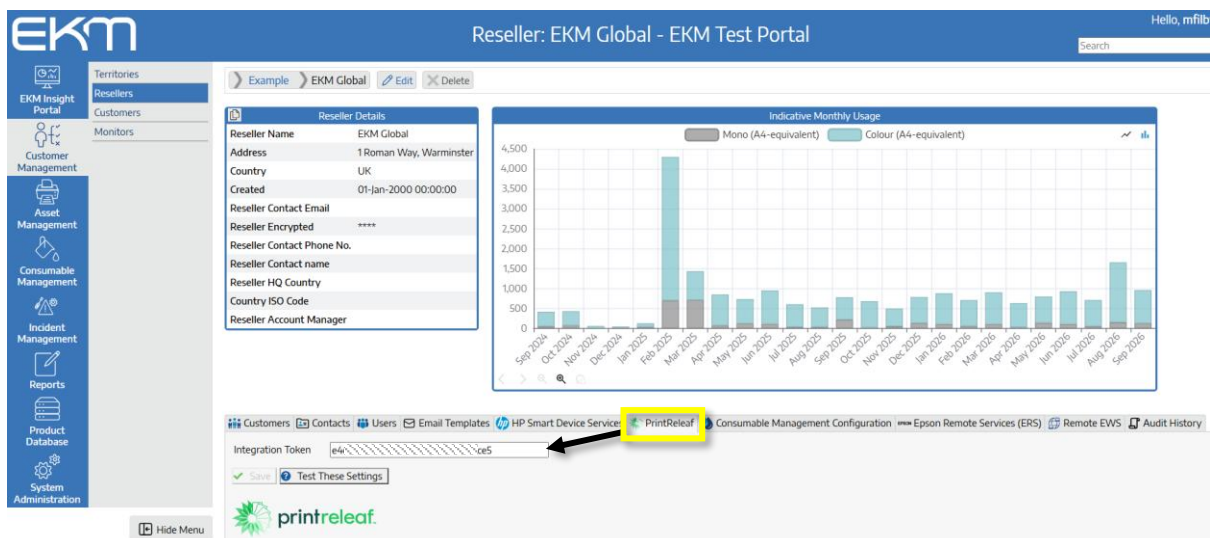
- Copy the **Integration Token** value.



Part II: Configuring EKM Insight

Follow the steps below to configure your PrintReleaf Integration Token in EKM Insight.

- In EKM Insight, navigate to the PrintReleaf tab.
- Paste your Integration Token from Part I.



Once the token has been entered, before it is saved, the button **"Test These Settings"** can be used to check the token is valid. This will both confirm that EKM Insight and the PrintReleaf API can communicate and validates the account name for the token entered.

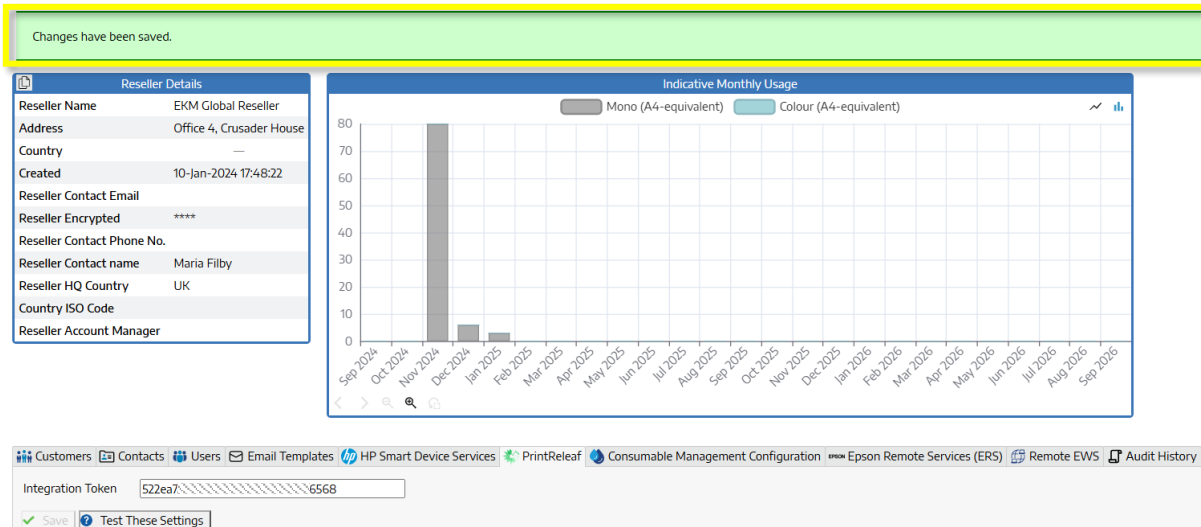
Customers Contacts Users Email Templates HP Smart Device Services PrintReleaf Consumable Management Configuration Epson Remote Services (ERS) Remote EWS Audit History

Integration Token: 522ea7...568 ✓ Test Passed API Account: EKM Sandbox

Save Test These Settings

printreleaf.

Once you have saved the integration token, a notification banner will be displayed.



Customer Configuration

After configuring PrintReleaf for the reseller / customer group, each customer also needs to be added. There are three ways to achieve this:

- Creating a new PrintReleaf customer from Insight
- Connecting to an existing PrintReleaf customer using an Account ID
- Importing in bulk

Creating a new PrintReleaf customer from Insight

From the 'Customers' page in Insight, clicking the button **"Create PrintReleaf Account"** will start the process:

Customer: EKM Global Customer - EKM Test Portal

Managed Devices: 3
Unmanaged Devices: 0
Total Devices: 3

Customer Details

- Status: Active
- Address: Roman Way
- City: Warminster
- Post Code: BA12 8SP
- Country: United Kingdom
- Contact Name: Maria Filby
- Contact Email: maria.filby@ekmglobal.com
- Contact Telephone: 01985 217920
- Created: 10-Jan-2024 17:49:30

Monitors | Custom Data | Zones | Delivery Locations | People | Consumable Management Configuration | Alert Management Configuration | HP Smart Device Services | **PrintRelease**

Last deposit uploaded: No deposits uploaded
Use customer specific Integration Token: ☐
Account ID:
Integration Mode: Disabled

Save | Test These Settings | View PrintRelease Account | **+ Create PrintRelease Account**

The following display will appear:

PrintRelease Account Name: EKM Global Customer

Save | Test These Settings | View PrintRelease Account | **OK** | Cancel

Enter the **PrintRelease Account Name** (by default the customer's name in Insight is suggested), which can be edited before **OK** is clicked.

PrintRelease Account Name: EKM Global Customer

Save | Test These Settings | View PrintRelease Account | **OK** | Cancel

Once **OK** is clicked, EKM Insight attempts to create the account on PrintRelease. If an account exists with the same name an error will be returned, and another name will need to be chosen. If the account name is unique the Account ID is created and saved under the newly created customer.

Last deposit uploaded: No deposits uploaded
Use customer specific Integration Token: ☐
Account ID: 05ac...3541
Integration Mode: Managed Devices Only

Save | Test These Settings | View PrintRelease Account

The default Integration mode is set to 'Managed Devices Only', but can be configured as:

- **All Devices** - Deposits are uploaded for every device.
- **Managed Devices Only** - Deposits are uploaded only for managed devices.
- **Disabled** - No deposits will be uploaded for this customer.

Connecting to an existing PrintReleaf customer using an Account ID

The customer may already exist in PrintReleaf, if:

- The customer was created manually using the PrintReleaf web application
- The customer was created automatically via another DCA tool and want to re-link the customer

If so, you can extract the Account ID from the PrintReleaf web application:

The screenshot shows the PrintReleaf dashboard for EKM Global Limited. The URL in the browser is `printreleaf.com/dashboard/account/6593aal...`, with the account ID `6593aal...` highlighted in a yellow box. The left sidebar shows the 'Accounts' menu item highlighted in a yellow box. The main content area shows the 'Accounts' page for 'EKM Maria', with tabs for Overview, Certificates, Biomass, Carbon, Deposits, and QR Codes.

This value can be copied into the Account ID for the customer group on Insight:

The screenshot shows the EKM Insight portal for 'Customer: EKM Global Customer - EKM Test Portal'. The 'Customer Details' section shows the customer is 'Active' and provides contact information. The 'Indicative Monthly Usage' chart shows a significant spike in usage for November 2024. The 'Monitors' section shows 'No deposits uploaded'. The 'Integration Mode' dropdown is set to 'Managed Devices Only'. The 'Account ID' field contains the value `05...`. The 'Test These Settings' button is highlighted in a yellow box.

The button "Test These Settings" will call the PrintReleaf API and confirm that the account ID works, and check that the name of the account is displayed as it is stored on the PrintReleaf portal.

Last deposit uploaded	No deposits uploaded
Use customer specific Integration Token	☐
Account ID	05a2...541 ✓ Test Passed Deposit Account: EKM Global Customer
Integration Mode	Managed Devices Only ▼
✓ Save ? Test These Settings 🌱 View PrintReleaf Account	

Bulk Import

When migrating accounts from another DCA tool, it may be necessary to transfer all your customer account IDs in a single batch. Please contact our help desk for assistance with this.

Customer Specific Integration Tokens

It is possible for a customer who has their own PrintReleaf account to use their own Integration token.

Ensure that "Use customer specific integration token" is checked and enter the token into the "Integration Token" field.

Last deposit uploaded	No deposits uploaded
Use customer specific Integration Token	☒
Integration Token	
Account ID	
Integration Mode	Managed Devices Only ▼
✓ Save ? Test These Settings 🌱 View PrintReleaf Account	



All deposits for the customer will then be uploaded under their own integration, and not the reseller / customer group level integration.

Note: It is not possible to configure a customer's deposits to upload under two different integration tokens.

View PrintReleaf Account Button

Last deposit uploaded	No deposits uploaded
Use customer specific Integration Token	☐
Account ID	f0608a46-beaa-4832-bc58-66b20515e3a5
Integration Mode	Managed Devices Only ▼
☒ Save	Test These Settings <input checked="" type="button" value="View PrintReleaf Account"/>

The button "**View PrintReleaf Account**" will take you directly to the PrintReleaf account page for that customer. This will open in a new tab or window, and you will need to use your PrintReleaf username and password to access the account:

The screenshot shows the PrintReleaf account page for 'New customer Ltd TEST'. The page has a dark sidebar with navigation links: BUSINESS (Dashboard, Accounts, Profile, QR Codes), OFFSETS (Biomass, Carbon, Deposits, Certificates), and ADMIN (Integrations, API, Reports, Billing, Users). The main content area shows the account overview with tabs for Overview, Certificates, Biomass, Carbon, Deposits, QR Codes, Users, and Settings. The 'Overview' tab is active, displaying a 'Biomass Volume History' chart and a 'Biomass Volume Summary' table. The chart shows a line graph with a y-axis from 0 to 1K and an x-axis from Sep to Sep. The summary table shows the following data:

PERIOD	SHEETS	STD TREES
This Month	0	0
This Year	0	0
Lifetime	0	0

Deposit Uploading

Upload Time

By default, EKM Insight will compile engine cycle counts and upload PrintReleaf deposits once a day at 19:00 UTC (this can be configured upon request).

What is uploaded?

Each customer with an Account ID configured will have a daily deposit total upload, if the total is 0 then no deposit will be made.

The total upload is the total number of engine cycle counts for the devices between the current date and the last deposit upload date. If there is no last deposit upload data (for example if a customer has only just configured PrintReleaf) then only the previous days totals are used. If a customer's integration mode is **All Devices**, then every device engine cycle is used, if the mode is **Managed Devices Only**, then only devices that are set to be managed contribute towards the total. If the

mode is **Disabled**, then no devices contribute towards the total and that customer will not upload a deposit total.

Upload backdating

Because the totals are taken from the last deposit date up to the current date, if any deposit uploads are missed then the system will simply collate the missed uploads into the next successful deposit. For example, if a network failure on Monday prevented the deposit uploading and the fault was not repaired until Wednesday, then Wednesday's upload would contain the totals for Monday, Tuesday, and Wednesday. This would be deposited as Wednesday's upload and not as three separate uploads, and the total would still match what would have been uploaded without the fault.

Setting a customer's Integration Mode to **Disabled** will stop the upload of engine cycle counts. If the customer's Integration Mode is then changed to "All Devices" or "Managed", then all the totals (since the Disabled mode was set) will be included in the upload.

For further assistance please contact EKM Support at support@ekmglobal.com