



LSS Cloud Quick Start Guide

Welcome

Welcome to LifeSaver Software®, Inc. the industry standard for Point of Sale and Design Software for the Professional Picture Framing and Art Gallery industry. Developed with the feedback of Certified Picture Framers and art professionals worldwide, LifeSaver Software helps solve the many issues encountered by professionals that are currently using price lists, calculators and drawing designs by hand. LifeSaver is founded for and based upon improving the quality of life for our customers.

LifeSaver Software for picture framing is one of the oldest and most respected software suppliers in our industry. LifeSaver was founded in 1994 by a team of certified picture framers and a leader in the software engineering field. The team of picture framers and engineers is one that assures you, the retail framer, that we will continue to offer the easiest, most comprehensive, state-of-the-art, most customizable program ever offered to picture framers.

You'll find LifeSaver Software to be an extremely capable design and production tool offering unparalleled support and ease of use. LifeSaver Software prides itself on being the only industry related software specifically designed from the picture framer's point of view, thus being the easiest, most intuitive software available on the market.

We, the staff at LifeSaver Software, Inc., would like to thank you for your purchase and want you to know that we consider it a partnership between our business and yours. Please feel free to contact us at any time with your comments and suggestions.

You can reach us at www.lifesaversoft.com or call us toll free at 1-800-381-0600. We are available Monday through Friday 9:00 am – 5:00 pm EST/EDT. We are also on call for emergency situations on Saturday from 10:00 am – 5:00 pm. You can also e-mail support 24/7. E-mails will be returned within 24 hours.

Introducing LifeSaver Cloud

A breakthrough for the picture framing industry – allowing a frame shop to operate from anywhere from any smart device.

LifeSaver is again showing their commitment to your business by providing new state-of-the-art tools for you to use in your business. We want to help your business grow!

Run the newest version of our award-winning software from anywhere on most portable devices and tablets. The choice is yours!

LifeSaver Cloud can be run from your desktop but can also allow you the freedom to roam the store with your tablet or smartphone and the flexibility to design right in your client's home.

You can run on as many devices as you need while all sharing the same pricing and inventory database. With LifeSaver Cloud you have the ability to check on your store when you are away as well as adjust pricing for your big sale from the comfort of your home.

Give LifeSaver Cloud a test drive and see why it can pay to not be tied down by cables anymore!

LifeSaver Contact Info

LifeSaver Support: **1-800-381-0600 Ext: 2**

LifeSaver Support E-mail: **support@lifesaversoft.com**

Website: **<http://www.lifesaversoftware.com/>**

Facebook: **<https://www.facebook.com/LifeSaverSoft>**

Twitter: **<https://twitter.com/LifeSaverSoft>**

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System Requirements

- **Tablets & Smartphones:** IOS, Windows or Android operating system with at least 16G of memory.
- **Device Examples:** iPad, Microsoft Surface Pro, Samsung Galaxy Tab & Amazon Fire.
- **Optional equipment for Tablets/Smart Phones:** All are available from various vendors on the web.
 - Wireless/Bluetooth Printer
 - Wireless/Bluetooth Bar Code Scanner Gun
 - Wireless/Bluetooth Receipt Printer
 - Tablet Stand
- **Desktop Mac Computer or PC:** PC with Microsoft® Windows® 7 or Newer Operating System.
- **Optional equipment for Mac and PC:** All are available from various vendors on the web.
 - Laser Printer
 - Bar Code Scanner Gun
 - Receipt Printer
 - Cash Drawer
 - Touch Screen Monitor.
- **Internet Access:** Full Time Internet access via Wired, Wi-Fi, or Cellular connection.

***Note:** A warning displays if your internet connection drops.*

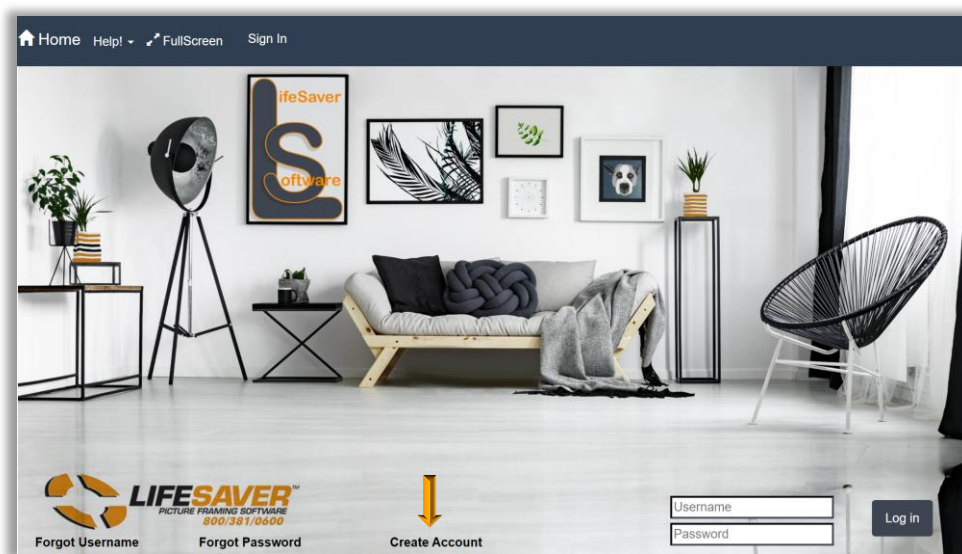
- **Internet Browsers:** Safari & Chrome

Getting Started

The following instructions and images were based and captured using Google Chrome Browser on a PC. Different devices and browsers can vary some in appearance and processes.

Register To Demo Or Purchase LifeSaver Cloud

1. Go to the following web address to register as a new store: www.lssccloud.com
2. Touch/Click **Create Account**.



LifeSaver Cloud Log In - Register Screen

3. Complete the New Store Registration fields. Touch/Click on the **Register** button when finished.
Note: You will need the Username and Password you create to log in to the program.

New Store Registration.

Store Information

Store Name	<input type="text" value="LifeSaver Training Gallery"/>
Street	<input type="text" value="1234 LifeSaver Circle"/>
Street Continued	<input type="text"/>
City	<input type="text" value="Canton"/>
Country	<input type="text" value="UNITED STATES"/>
State	<input type="text" value="GA"/>
Zip	<input type="text" value="30114"/>
Phone	<input type="text" value="404-123-4567"/>
Fax	<input type="text"/>
Email	<input type="text" value="LSTG@gmail.com"/>

Contact Information

FirstName	<input type="text" value="Tristan"/>
LastName	<input type="text" value="Trainee"/>
UserName	<input type="text" value="tristantrainee"/>
Email	<input type="text" value="tt@gmail.com"/>
Password	<input type="password" value="*****"/>
Confirm password	<input type="password" value="*****"/>
Measurement Unit	<input type="text" value="Inch"/>
Agree to the Terms of Use?	<input checked="" type="checkbox"/> (Terms of Use)

Register

Before you can log in for the first time, you will need to verify your email address. An email will be sent to the address you entered above.

New Store Registration Screen

4. The LifeSaver Cloud Home Menu Screen will display.

Home

Help!




Security

FullScreen

Change Store

Hello tommytrainee!

Log off



Training Gallery

1234 LifeSaver Lane

Holly Springs, GA 30142

Write Orders

Invoice Search	Browse Invoices	Payments	Quotes
Store Configuration	Customer Database	Moulding	Mat
Glazing	Services (Specials)	Vendor Markup	Art Conditions
Art Types	Inventory	Production	Reports
Fabric	Promotions	Manager Override	Release Notes
Pick List	FrameVue Devices	Order	Package Price

LifeSaver Cloud Home Menu

Registered Users

1. To access the LifeSaver Cloud Program after you register - **Type Username** and **Password** that you created in the Registration screen. Touch/Click on the **Log In** button.
2. Login Screen Options
 - a. **Forgot Username:** Type your account's email address in the field provided – Touch/Click **Email Link** button.
 - b. **Forgot Password:** Type your username in the field provided – Touch/Click **Email Link** button.



LifeSaver Cloud Login Screen

Log Off

1. Touch/Click **Log Off** located top right corner on the Home screen.



User Already Logged In

If you did not log out of your previous session and you login in again, you will receive the following pop-up window.

User already logged in

***You are trying to log in but you already have an active session. It could be that you forgot to logout. Or you are still logged in on another computer. If you terminate this active session then all information will be lost on that other computer if you are still using it.

First Name	Last Name	User Name	Session Created	
Tristan	Trainee	tristantrainee	12/18/2019, 11:33:17 AM	<div>Terminate Session</div>

Cancel

1. Touch/Click the **Terminate Session** button.
2. You will return to the Home screen. Type **Password**. Touch/Click **Log In** button.

Exceeded Current Sessions for Number of Licenses

1. When you receive the following pop-up message window after login. *There are too many current sessions for the number of licenses purchased. If you choose to terminate a session it will knock that user out of the system. If you terminate a user's session you must login again. It is always good practice to log off when your work is complete.* Touch/Click **Terminate Session** on the desired user line item.

User Sessions

***There are too many current sessions for the number of licenses purchased. If you choose to terminate a session it will knock that user out of the system. If you terminate a user's session you must login again. It is always a good practice to log off when your work is complete.

First Name	Last Name	User Name	Session Created	
Debbi	Babb	Debbi	10/20/2020, 12:50:30 PM	<div>Terminate Session</div>
Elsa	Employee	Elsa	10/20/2020, 12:52:15 PM	<div>Terminate Session</div>
Paul	Thomas	Paul	10/20/2020, 12:56:27 PM	<div>Terminate Session</div>

Cancel

2. Type **Username** and **Password**. Touch/Click **Login**.

Username

Password

Log in

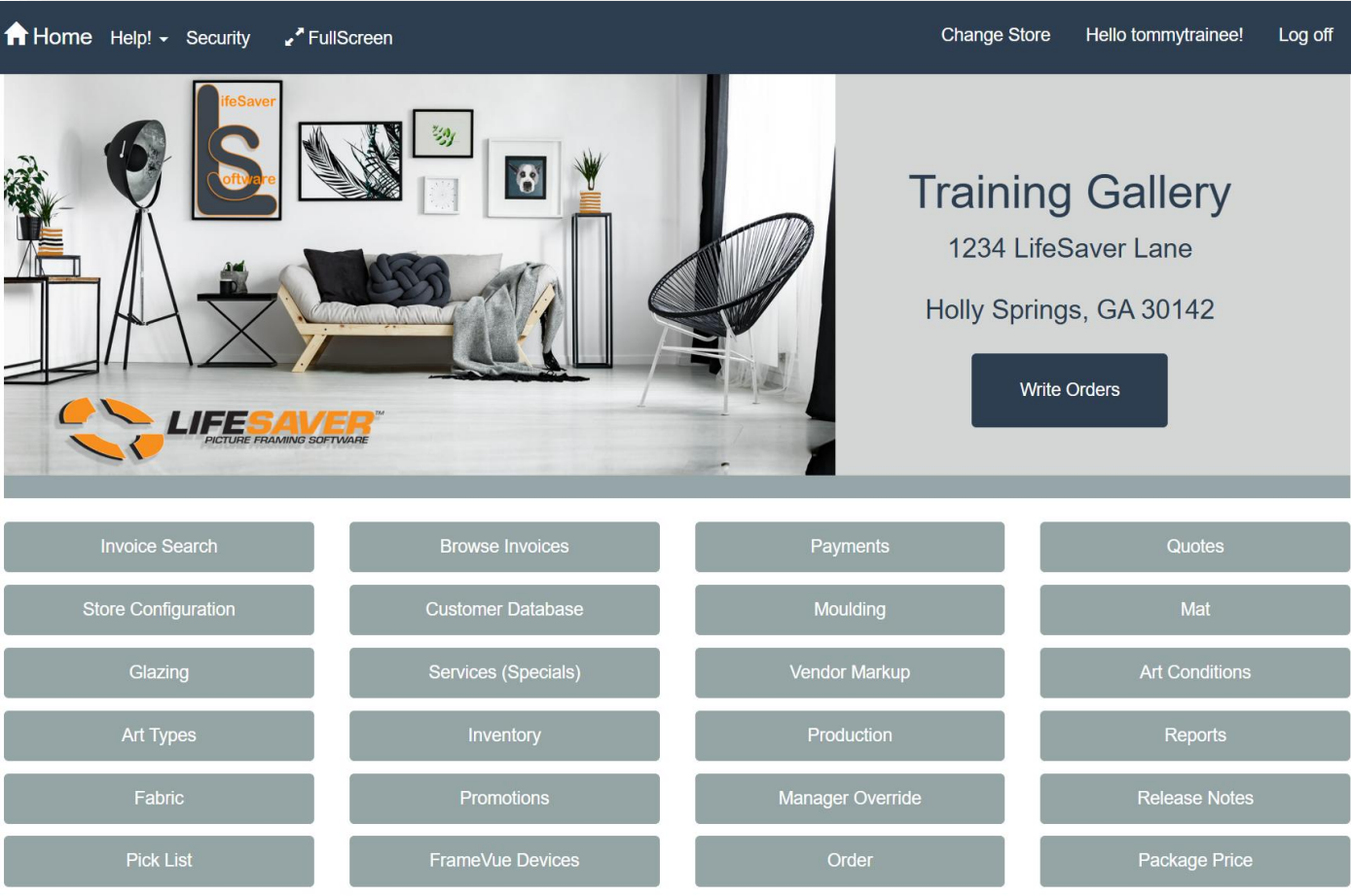
3. When the User that you terminated logs in, they will receive the following pop-up message window. *Your last session was terminated by First/Last Name at Date/Time.* They will Touch/Click **OK**.

Message:

Your last session was terminated by: Elsa Employee at 10/20/2020 1:06:56 PM



OK

LifeSaver Cloud Home Screen Menu Option Descriptions



Home/Main Menu

**From top left to right on image*

- a.  **Home:** Touch/Click to take you back to the Home Menu screen. This option is available in all screens.
- b. **Help!:** User Guides and LifeSaver Website. Will open in a separate tab on your device.
- c. **Security:** Register store users/employees and select the menu options they are allowed to perform. Can also delete user/employee, change their permissions/roles and change passwords.
- d. **Change Store:** For frame shops that have multiple stores.
- e.  **Full Screen Mode:** This is useful when using a tablet. On a desktop computer the EXC will exit full screen.
- f. **Current User Greeting:** Hello Username!
- g. **Log Off:** Sign out of the LSS Cloud Menu and return to the Log In screen. Use this option also to change users.
- h. **Your Store Name:** Includes Street Address, City, State and Zip code.
- i. **Write Orders:** Sell store product inventory, write custom design workorders, write/resume quotes and take payments.
- j. **Invoice Search:** Search, view, process payment, edit or refund a previous invoice/workorder.
- k. **Browse Invoice:** Will list your latest invoices. Select the last 10, 30 or 50 invoices to view or edit.
- l. **Payments:** Process payments, refunds, edits and voids. Print, email & text Invoices. Upload mat cut files to CMC.
- m. **Quote:** Complete, print, resume or delete a quote.
- n. **Store Configuration:** Setup your store's program, business and financial details.
- o. **Customer Database:** Create, View, Edit or Delete Customer Profile Details. Can also view customer's invoice/workorder history.
- p. **Moulding:** Add a moulding vendor. Search a moulding item code to display the moulding's details, such as description, vendor, size, type, cost, markup and retail price. Display selected vendor's moulding product list. Designate in-store stock moulding.
- q. **Mat:** Add a mat vendor. Search a mat item code to display the mat's details, such as description, vendor, size, type, cost, markup and retail price. Display selected vendor's mat product list. Designate in-store stock mats.
- r. **Glazing:** Search, Create or Markup glazing. Edit, Add or View the following glazing details: name, substrate, costing method, description, category, sku, height, width, cost, markup and retail price.

- s. **Services - Specials:** Create or edit labor and material types. Set the following parameters for each special: Name, Description, Special Type, Standard or Oversize, Height, Width, Labor Cost, Labor Costing Method, Material Cost, Material Cost Markup, Material Cost Method.
- t. **Vendor Markup:** Add mat and moulding vendors to your program. Mat and Moulding markup charts.
- u. **Art Conditions:** List of categories to note in the workorder the type of physical condition the art is in when you receive it to frame. Ex: Cracks, Flaking, Crease, Good etc. Create new and deactivate options available.
- v. **Art Types:** List of categories to note the type of art you are framing in the workorder. Ex: Pastel, Watercolor, Pen and Ink, etc. Create new and deactivate options available.
- w. **Inventory:** Create, Search, View or Edit your store's Art and Gallery inventory.
- x. **Production and or Production New:** Manage production workshop by updating the status of a workorder/invoice.
- y. **Reports:** Contains the following store reports – Payments, Orders, Work Orders, Paid in Full, Ticket Sales, Customer, Production, Material Usage, Invoices and Closing.
- z. **Fabric:** Add a fabric vendor. Search a fabric item code to display the details, such as description, vendor, size, type, cost, markup and retail price. Display selected vendor's fabric product list. Designate in-store stock fabric.
- aa. **Promotions:** Create, Edit and Delete a promotional discount.
- bb. **Manager Override:** Create Manager Override Reasons.
- cc. **Release Notes:** Update details that include New Features and Bug Fixes.
- dd. **Pick List:** The list will contain the mouldings, mats, mounting materials and glazing needed to complete workorders. Also use this list to check your current stock inventory before placing your orders. The picklist is also accessible under the Reports - Closing button. It differs somewhat, use the version that works best for you.
- ee. **FrameVue Devices:** Link your customer's FrameVue App to your store so they can send their photos from their device to your LSS Cloud program for custom framing using visualization.
- ff. **Order:** Manage your production workshop by updating the status of a workorder or component. This order screen is similar to the current production screen but has a grid-based layout. It allows you to update the status on individual components, add notes to the workorder, update customer call status and print the workorder.
- gg. **Package Pricing:** *Create pricing packages that include a selection of mouldings, mats, glazing and services for one price point.*

Configure Store

After you've installed LifeSaver, it is recommended that you begin by configuring some essential information before running the program. In this section, we'll review how to setup your business details and financial properties, so you can start using the Most Comprehensive Online Picture Framing Software in the Industry.

- Touch/Click on the **Store Configuration** button on the LifeSaver Home Screen.

Workshop Tab

Set your workshop's production schedule by selecting only the weekdays and start/end times that are available to complete workorders and the number of units it can produce each day. These settings will determine your workorder due dates. The workshop schedule can be edited at any time when changes occur.

1. Touch/Click the field to the left of the weekday to **select which days your shop will be available or unavailable** to complete a workorder. A check mark in the field represents that the day is available in the workshop and a blank box represents the day is unavailable in the workshop.
2. Set the open and close times for each day the shop will be in production.
 - Touch/Click the first field next to the specific weekday to **designate the opening hour time**. Touch/Click on the appropriate up/down arrow till you arrive at the **correct hour**. **Repeat** the process for the next field to **set minutes**.
 - Touch/Click the **AM/PM** field arrow. Touch/Click the **appropriate period**.
 - **Repeat** the above process to select the **closing hour, minutes and time period**.

Note: Closed days will be represented by zero hour and zero minutes.

3. Set the number of workorders your shop will be able to complete on each day of the week.
 - Touch/Click on the **Units** field. Touch/Click on the up/down arrow to **select the number of units**.
 - Closed days will be represented by zero units.

Note: The default lead time will be set in the Settings tab.

4. **Repeat steps 1 – 3** to set hours, minutes, time period and units for each day.

5. Touch/Click on the **Save** button.

Store Configuration

Workshop

Taxes

Credit Card Processor

Settings

Store Information

Printing

Production

Availability

☐ Sunday
 ☒ Monday
 ☒ Tuesday
 ☒ Wednesday
 ☒ Thursday
 ☒ Friday
 ☐ Saturday

Hours / Production

Sunday	12	:	0	AM	To:	6	:	0	PM	Units	0
Monday	10	:	0	AM	To:	6	:	0	PM	Units	15
Tuesday	10	:	0	AM	To:	6	:	0	PM	Units	15
Wednesday	10	:	0	AM	To:	6	:	0	PM	Units	15
Thursday	10	:	0	AM	To:	6	:	0	PM	Units	15
Friday	10	:	0	AM	To:	6	:	0	PM	Units	15
Saturday	10	:	0	AM	To:	17	:	0	PM	Units	0

Save

Store Configuration - Workshop Tab

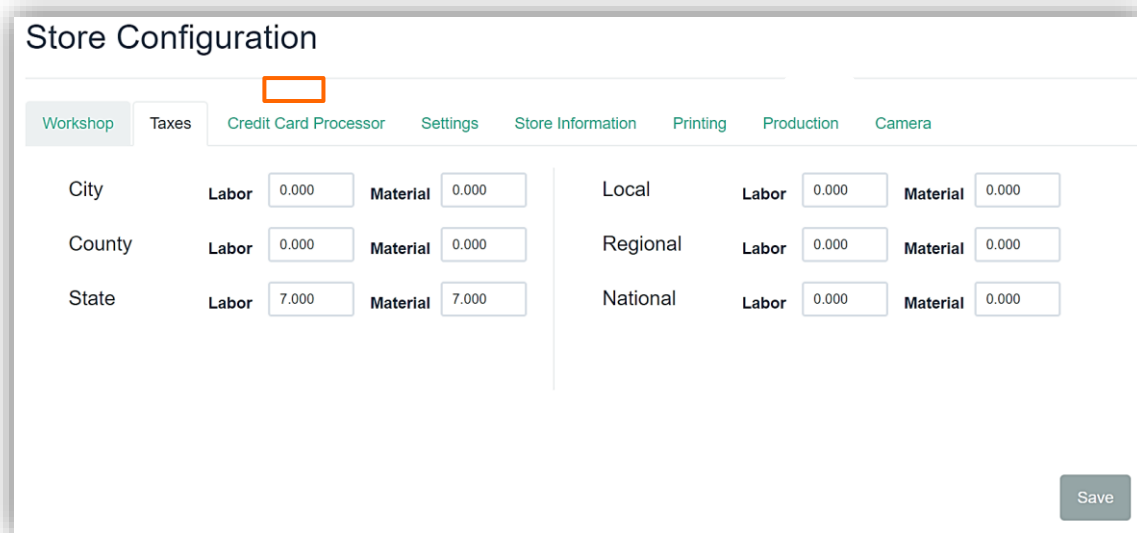
Taxes Tab

Set your Labor/Material tax rates for the following categories when applicable: combined, city, county, state, local, regional and national.

1. Touch/Click on the **Taxes** tab.
2. For each line item that applies. Touch/Click the **Labor** field. Touch/Click the up/down arrows to **select desired number**.
3. Touch/Click the **Material** field. Touch/Click the up/down arrows to **select desired number**.
4. Touch/Click **Save** when all appropriate line items have been completed.

Note: Tax line items that do not apply should be represented by a zero in the Labor and Material fields.

5. Touch/Click on the **Save** button.



The screenshot shows the 'Store Configuration' window with the 'Taxes' tab selected. The 'Credit Card Processor' tab is highlighted with an orange box. The form contains two columns of input fields. The left column has 'City', 'County', and 'State' labels, each with 'Labor' and 'Material' input fields. The right column has 'Local', 'Regional', and 'National' labels, each with 'Labor' and 'Material' input fields. A 'Save' button is located at the bottom right.

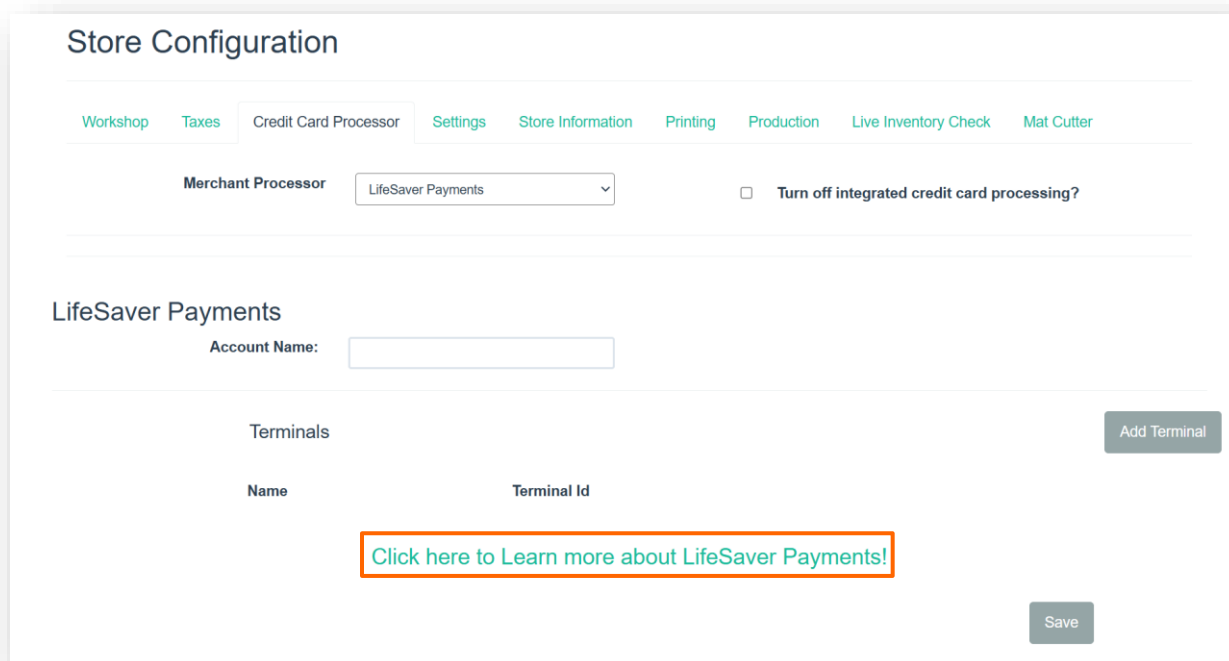
Category	Labor	Material
City	0.000	0.000
County	0.000	0.000
State	7.000	7.000
Local	0.000	0.000
Regional	0.000	0.000
National	0.000	0.000

Store Configuration - Taxes Tab

Credit Card Processor Tab

Make your LifeSaver Cloud program easier with integrated credit card processing. We offer LifeSaver Payments.

1. To get signed up and get started on LifeSaver Payments. "Click here to learn more about LifeSaver Payments!" at the bottom of the window.



The screenshot shows the 'Store Configuration' window with the 'Credit Card Processor' tab selected. The 'Merchant Processor' dropdown is set to 'LifeSaver Payments'. There is a checkbox for 'Turn off integrated credit card processing?'. Below this is the 'LifeSaver Payments' section with an 'Account Name' input field. At the bottom, there is a 'Terminals' section with 'Name' and 'Terminal Id' headers, an 'Add Terminal' button, and a link 'Click here to Learn more about LifeSaver Payments!' highlighted with an orange box. A 'Save' button is at the bottom right.

Merchant Processor: LifeSaver Payments

☐ Turn off integrated credit card processing?

LifeSaver Payments

Account Name:

Terminals


Add Terminal

Name Terminal Id

[Click here to Learn more about LifeSaver Payments!](#)

Save

2. If interested complete the form and touch/click the Speak with and Expert button.

PAYMENTS

Upgrade to LifeSaver Payments – The Future of Integrated Frame Retail POS Systems

Simplify Your Transactions, Elevate Your Business

Welcome to a new era of seamless transactions with LifeSaver Payments, your all-in-one solution designed to simplify how you do business. Discover the ease of integrating your built for framing retail store POS system with advanced payment processing capabilities, delivering you unparalleled efficiency and reliability.

Claim Your Discount on Hardware

Sign up by March 15, 2024:

First name*

Last name*

Phone number*

Unit +1

Email*

Company name*

Speak with an Expert

Why Choose LifeSaver Payments

2,500+

Enjoyed by thousands of happy retailers

10M+

Over 10,000,000 transactions processed

\$1B+

Over \$1,000,000,000 in transactions processed

3. A Hardware Specialist will contact you and walk you through setting up your new P5 credit card terminal and completing the information in the Configure Credit Card Processing window.
4. If you choose not to use LifeSaver payments touch/click “Turn off integrated credit card processing?”. Touch/Click the Save button.

☒ Turn off integrated credit card processing?

Settings Tab

Select/Enter store settings that you would like to apply to your program. Can be edited at any time.

1. Touch/Click on the **Settings** Tab.
2. **Unit of Measurement:** Select Inch (Imperial) or Millimeter (Metric).
3. **Default Work Order Lead Time:** Enter the **number of workshop lead days** into the field. **Example:** If you would like your due date 2 weeks out, enter 14.
4. **Default Moulding UOM:** Select the default moulding unit of measure (Join-Chop-Length) for all moulding vendors in your database. Leave selection on None if you would like to setup the default UOM by moulding vendor.
5. **Lock Moulding UOM?:** Select to lock the default moulding unit of measure on the workorder screen.
6. **Use default fitting charge?** Select if you would like to add an automatic fitting charge on workorders. Set cost/markup under the Fitting button in the Services (Specials) menu.
7. **Prompt to Check Fillet Width?:** Add reminder for the user to ensure that the fillet width is correct.
8. **Show Glazing on Layer:** Select to display Glazing on Layer as a moulding option in the workorder.
9. **Show Cost on Workorder Screen:** Show component cost and retail.
10. **Use LJ Moulding Footage Formula:** Select if you carry/sell Larson Juhl moulding.
11. **Currency Type:** Select currency type in the drop-down list.
12. **Default Mat Costing Method:** Select the default mat costing method (Sq. Inch – Sq. Meter – UI – Sheet – Cut Sheet – Quarter Sheet) for all mat vendors in your database. Leave selection on None if you would like to setup the default costing method by mat vendor.
13. **Moulding Waste Per Order:** Enter in the number of inches wasted per corner. The program will multiply the number entered times 4 corners and add the total inches to the amount of moulding footage needed for the workorder. (Optional)
14. **Mat Top, Bottom, Left & Right Reveal:** The default is 3 inches. To edit Touch/Click each field and **type desired reveal**.

15. **Reveals for the 2nd and 3rd mat** are defaulted to ¼ inch. To edit Touch/Click each field and **type desired reveal**.
16. Use **Add Reveal**:
- Default: When selected, you are entering only the top mat width in the Top Bottom Left and Right mats fields. Then as you enter additional mats the reveal for those mats will increase the finished size in addition to the top mat width which is already included.
 - When Add Reveal is not selected you are entering the combined mat width for all mats in the Top, Bottom, Left and Right mat width blanks. Then when you enter additional mats the reveal is already included in the total mat width; therefore, it subtracts it from that width to display on the Workorder print out.
17. **Require Manager Override**: Select to require management approval (Login/Password) on all manager overrides on workorders.
18. **Require Customer?**: Require that a customer is identified on every workorder/invoice. Touch/Click box to Select/De-Select.
19. **Require Art Type**: Select to require that the art type is selected on all work orders.
20. **Require Art Condition**: Select to require that the art condition is selected on all work orders.
21. **Require Promotion**: Require that a promotion type be selected on all workorders. A reminder message will display if you try to add the workorder to the invoice without selecting a promotion type.
22. **External Payment Process**: If you use a separate point of sale to process customer payments, you can select to bypass the payment prompt and accept payment screen.
23. **External Gift Card Payment Process**: Selecting will allow you to process gift card payments through and external process.
24. **Show TruVue Glazing Upsell Pop-Up?** Will ask user if they would like to upgrade to the next level up of TruVue glazing and the cost.
25. **Show charge account payment option on the payment screen?**: **Select** if you offer in-house charge accounts.
26. **Show Frame Club payment option on the payment screen?** (Company Specific)
27. **Show Groupon Payment option on the payment screen?** Select if you would like to accept Groupons.

28. **Show write-off payment option on the payment screen?:** Select if you would like the option to write-off an invoice with a balance due. The invoice will no longer show in receivables and the invoice deposit will then become the total sale amount.
29. **Order Screen. Require payment before delivery?** Workorders must be paid in full before they are delivered.
30. **Order Screen:** Number of days to search date from current date.
31. **Ticket Screen: Width X Height?:** The workorder image size default is Height X Width. To **Reverse to Width X Height** on the workorder screen: Touch/Click **Box**.
32. **Enable FrameVue?** De-select if you do not want to use the FrameVue option.
33. **Allow manual entry items on an invoice?:** Select if you do not want the option to add manual entry items to the invoice.
34. **Require all workorders on the invoice to be delivered all at once?:** Select if you want to require that all workorders on one invoice must be delivered at the same time.
35. **Hide the Discount Option When You Write a Workorder:** Select if you would like no access to the Discount Menu on the workorder.
36. **Use New Production Screen?:** Select to implement New Production menu.
37. **Include inventory items on production screen?:** In addition to workorders select this option to display inventory items sold to the customer.
38. **Inventory items automatically marked as delivered?** Select if you would like all sold inventory items to show as delivered.
39. **Decrement Inventory:** Reduce the on-hand inventory quantity when an item is sold. Only applies to inventory items.
40. **Warn When Inventory Falls Below Threshold:** Receive a low inventory alert in the invoice window when an added item's quantity has fallen below the set threshold.
41. **Additional Amount Per Foot:** Type a \$ amount into the field to be added to the moulding cost per foot. Some framers use this method as an alternative to adding a markup to the moulding cost. Do not enter \$ sign into the field.

42. **Additional Amount Per Mounting.** Type in field additional dollar amount to be added to the mounting price in a workorder.
43. **Additional amount per glazing:** Add additional dollar amount to be added to the glazing price in a workorder.
44. **Additional Amount Per Mat.** Type in field additional dollar amount to be added to the mat price in a workorder.
45. **Additional Mat Charge Per Work Order:** Insert dollar amount to be added to all the mats in a workorder.
46. **Minimum mat price is X times cost:** When calculating retail ensure that the price is at least **a number of times** the cost of the whole board.
47. **Labor as Percent of Materials:** Type percentage number to calculate the fitting fee by percentage of materials in the work order. The default of “0” will calculate the fitting fee by “times markup” in the workorder that is currently set under the Fitting tab in the Services (Specials) menu.
48. **Moulding Minimum Footage:** Enter the number of minimum feet sold on a workorder.
49. Click the **Save** button.

Store Configuration

Workshop Taxes Credit Card Processor **Settings** Store Information Printing Production Live Inventory Check Mat Cutter

Unit of Measurement:	<input type="text" value="Inch"/>	Currency Type:	<input type="text" value="United States Dollar"/>
Default Work Order Lead Time:	<input type="text" value="14"/>	Default Mat Costing Method:	<input type="text" value="Square Inch"/>
Default Moulding UOM:	<input type="text" value="Length"/>	Moulding Waste Per Corner	<input type="text" value="0"/>
<input type="checkbox"/> Lock Moulding UOM?			
<input checked="" type="checkbox"/> Use Default Fitting Charge?			
<input type="checkbox"/> Prompt To Check Fillet Width?			
<input checked="" type="checkbox"/> Show Glazing On Layer?			
<input type="checkbox"/> Show Cost On Write Orders Screen?			
<input type="checkbox"/> Use LJ Moulding Footage Formula?			
Top Border:	<input type="text" value="3"/>	Bottom Border:	<input type="text" value="3"/>
Reveal 2nd Mat	<input type="text" value="1/4"/>	Left Border:	<input type="text" value="3"/>
Reveal 3rd(+) Mat	<input type="text" value="1/4"/>	Right Border:	<input type="text" value="3"/>
<input checked="" type="checkbox"/> Use Add Reveal?			
<input checked="" type="checkbox"/> Require Manager Override?			
<input type="checkbox"/> Require Customer?			
<input type="checkbox"/> Require Art Type?			
<input type="checkbox"/> Require Art Condition?			
<input type="checkbox"/> Require Promotion?			
<input type="checkbox"/> Ticket Screen: Width X Height?			
<input checked="" type="checkbox"/> Enable FrameVue™?			
<input checked="" type="checkbox"/> Allow Manual Entry Line Items On An Invoice?			
<input type="checkbox"/> Require All Work Orders On An Invoice To Be Delivered Together?			
<input type="checkbox"/> Hide The Discount Option When You Write A Work Order?			
<input type="checkbox"/> External Payment Process? ⓘ			
<input type="checkbox"/> External Gift Card Payment Process? ⓘ			
<input checked="" type="checkbox"/> Show TruVue™ Glazing Upsell Popup?			
<input checked="" type="checkbox"/> Show Charge Account Payment Option On The Payment Screen?			
<input checked="" type="checkbox"/> Show Frame Club Payment Option On The Payment Screen?			
<input checked="" type="checkbox"/> Show Groupon Payment Option On The Payment Screen?			
<input checked="" type="checkbox"/> Show Write Off Payment Option On The Payment Screen?			
<input checked="" type="checkbox"/> Order Screen - Require Payment Before Delivery?			
Order Screen - Number Of Days To Start Search From Current Date:			
<input type="text" value="21"/>			
<input checked="" type="checkbox"/> Use New Production Screen?			
<input checked="" type="checkbox"/> Include Inventory Items On Production Screen?			
<input type="checkbox"/> Inventory Items Not Automatically Marked As Delivered?			
<input checked="" type="checkbox"/> Decrement Inventory?			
<input checked="" type="checkbox"/> Warn When Inventory Falls Below Threshold?			
Additional Amount Per Foot:	<input type="text" value="0"/>		
Additional Amount Per Mounting:	<input type="text" value="0.00"/>		
Additional Amount Per Glazing:	<input type="text" value="10.00"/>		
Additional Amount Per Mat:	<input type="text" value="0.00"/>		
Additional Mat Charge Per Work Order:	<input type="text" value="0"/>		
Minimum Mat Price Is X Times Cost:	<input type="text" value="2"/>		
Labor As A percent Of Materials:	<input type="text" value="0"/>	<input type="text" value=""/>	%
Moulding minimum footage:	<input type="text" value="0"/>		

Save

Configure - Settings Tab

Store Information Tab

Edit store address, email or phone number that was initially entered during the registration process or add to fields that are currently missing data. Add/Delete Logo

Store Info

1. Touch/Click the **Field** that needs to be changed.
 - a. **Edit**: Highlight/Backspace current data. Type new data into the field.
 - b. **Add**: Type new data.
 - c. Customer Review Link: Type **Web Address** for Marketing Tools.

Note: External Store Number is not available in the Registration process. Touch/Click field to add your store number if applicable.

2. Touch/Click the **Save** button

Upload Logo

1. Touch/Click **Choose File**.
2. Go to the **File** where your logo is located. **Example: Picture, Photo Library, Camera Roll.**
3. Touch/Click **Logo image**. Touch/Click **Open**.

Store Configuration

Workshop Taxes Credit Card Processor Settings **Store Information** Printing Production Live Inventory Check Mat Cutter

Store Name	<input type="text" value="Training Gallery"/>	Email	<input type="text" value="dbabb@lifesaversoft.com"/>
Street	<input type="text" value="1234 LifeSaver Lane"/>	Street Continued	<input type="text"/>
City	<input type="text" value="Holly Springs"/>	State	<input type="text" value="GA"/>
Zip	<input type="text" value="30142"/>	Country	<input type="text" value="UNITED STATES"/>
Phone	<input type="text" value="770-123-5678"/>	Fax	<input type="text"/>
External Store Number	<input type="text" value="LSSOnline store: 271"/>	CustomerReviewLink	<input type="text" value="www.traininggallery.com"/>

Email Template Editor


Upload New Logo

Choose File

No file chosen

* Logo must be 260px wide and 100px tall.

Current Logo



Committed to Your Success!

New Logo

Delete Logo

Save

Store Configuration – Store Information

4. Touch/Click **Save** if you approve of the logo image. If not, touch/click **Delete**.



5. Touch/Click the **Save** button.

Invoice # 691
Revision: 1

LIFESAVER
PICTURE FRAMING SOFTWARE

1234 LifeSaver Lane
Holly Springs, GA 30142
dbabb@lifesaversoft.com
770-123-5678

Betty Bevel
1234 Bevel Blvd
Holly Springs, GA 30142
bbevel@gmail.com
Home: 404-785-4512

Order Date: 5/22/2023
Last Revised: 5/22/2023
Salesperson: tiffanytrainee
Balance Due: \$0.00

Description	Quantity	Price	Total
The Italian Villa - Print - 20x18 [A1234]	1	\$350.00	\$350.00
Total Unit Price			\$350.00
Subtotal			\$350.00
Tax			\$24.50
Total			\$374.50

Payments

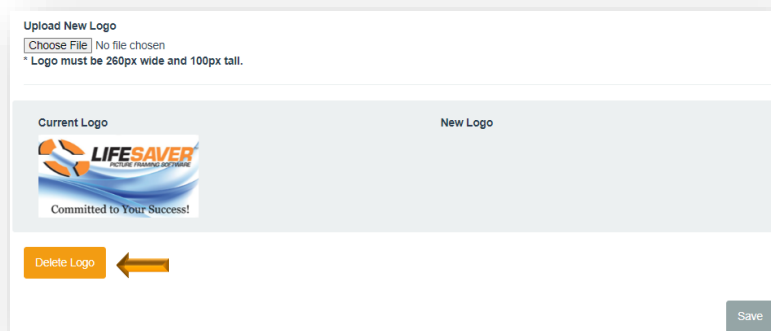
Date	Type	Method	Amount
5/22/2023	Payment	Cash	\$374.50
Total			\$374.50
Balance Due:			\$0.00

Disclaimer Verbage

Signature X _____

Delete Logo

1. Touch/Click the **Delete Logo** button.



1. Touch/Click the **Save** button.

Email Template Editor

You can edit the current generic customer email template that has the invoice attached.

1. Touch/Click the **Email Template Editor** under the Store Info tab.

The screenshot shows the 'Store Configuration' interface with the 'Store Information' tab selected. The 'Email Template Editor' button is highlighted with an orange arrow. The form contains the following fields:

Field	Value
Store Name	Training Gallery
Street	1234 LifeSaver Lane
City	Holly Springs
Zip	30142
Phone	770-123-5678
External Store Number	LSSOnline store: 271
Email	dbabb@lifesaversoft.com
Street Continued	
State	GA
Country	UNITED STATES
Fax	

Below the form, there is a section for 'Upload New Logo' with a 'Choose File' button and a note: '* Logo must be 260px wide and 100px tall.' Below this, there is a 'Current Logo' section showing a 'LIFE SAVER' logo with the text 'Committed to Your Success!' and a 'Delete Logo' button.

Store Info Tab – Email Template Editor

2. Touch/Click into to the **Header** field. Type the salutation you prefer to use. **Example: To, Dear Hello etc.**
3. Touch/Click in the **Body** field. Type your message. **Example: Thank You for your business. Your invoice is attached.**
4. Touch/Click into the **Footer** field. Type your **Complementary Closing**. **Example Regards, Sincerely, etc.**
5. Touch/Click into the **Name** field. Type **Name or Store Name**.
6. Touch/Click into the **Signature field**. Type **Store Name, Address, Phone, Website Address etc.**
7. Touch/Click the **Save** button.

Email Template Editor

Header
To, Dear, Hello, etc.

Body

Footer
Regards, etc.

Name
Name, Store Name, etc.

Signature
Other info such as store name, address, phone, etc.

Cancel Save

Email Template Editor

Header
Dear

Body
Thank You for your business! Your invoice is attached. If you have any questions please feel free to call me.

Footer
Regards,

Name
Training Gallery

Signature
PO Box 1212
Holly Springs, Ga 30142
800-381-0600

Cancel Save

Printing Tab

Designate number of workorder, invoice and receipt copies to be printed. Create disclaimers to display on your workorder, invoice and credit card receipt. Add Require signature. Configure print settings.

1. Touch/Click **Workorder, Invoice, Receipt Copy or Art Copy field**. **Type** desired **Number** of copies.

Disclaimers

1. Touch/Click in the Workorder, Invoice or Receipt **Disclaimer field(s)** and **Type** your disclaimer **Message**.
2. Touch Click the **Require Signature** box if the disclaimer needs a customer signature line.
3. Touch/Click **Save** button.

Print Settings

- e. **Add Art Copy to Workorder?** Select if you would like the Art copy to print on the workorder. Attach the art copy to the customer's artwork for identification purposes.
- f. **Approximate Date on workorder?** Will add the word "Estimated" in front of "Due Date" on the invoice.
- g. **Do not show details on quote?:** Select if you only want the Quote to display subtotal, tax and total on the Quote form.

- h. **Do not show totals on workorder?:** Select if you do not want the workorder total cost to display on the workorder form.
- i. **Print external store number on invoice.** Select if you would like the store number you have recorded under the Store Info tab to print on the invoice.
- j. **Print FV Image on Invoice and workorder.** De-Select if you would like the FrameVue image to not print on the invoice and workorder.
- k. **Print Invoice and Workorder in Black and White?** The default setting is Color ink. Select if you would like to only print in Black and white ink.
- l. **Do not show cost on pick list?:** Select if you do not want the costs to display on the pick list.
- m. **Show workorder number in bold on printed workorder? :** Select to bold workorder number on the workorder form.

- n. **Show work cash back on printed invoice?:**

Show amount received and amount in change on the invoice.

Payments			
Date	Type	Method	Amount
2/26/2025	Payment	Cash	\$25.00
		Tendered: \$30.00	Cash Back: \$5.00
Total			\$25.00
Balance Due:			\$0.00

Invoice – Amount Tendered - Cash Back

- o. **Hide the discounted amount on the invoice?:** Select if you do not want the discount to display on the invoice.

- p. **Alternate workorder format:** Select Workorder 1 or 2 in the drop down. Hover your mouse over the workorder 1 or 2 to display workorder image on the screen.

Alternate Workorder Format:

Work Order 1
 Work Order 2

Select Workorder Format 1 or 2

- q. Touch/Click **Save**.

Store Configuration

[Workshop](#)[Taxes](#)[Credit Card Processor](#)[Settings](#)[Store Information](#)[Printing](#)[Production](#)[Live Inventory Check](#)[Mat Cutter](#)Work Order Copies Invoice Copies Receipt Copies Art Copies WO Disclaimer 1: ☒ Require Signature?

Disclaimer Verbage

WO Disclaimer 2: ☐ Require Signature?WO Disclaimer 3: ☐ Require Signature?Invoice Disclaimer 1: ☒ Require Signature?

Disclaimer Verbage

Invoice Disclaimer 2: ☐ Require Signature?

Receipt Printer Disclaimer:

Disclaimer Verbage

Quote Disclaimer: ☐ Require Signature?

- ☒ Add Art Copy to Work Order?
- ☐ Show Approximate Due Date on Invoice?
- ☒ Do not show details on quote?
- ☐ Do not show totals on work order?
- ☐ Print external store number on invoice?
- ☐ Print FV Image on Inv and W/O?
- ☐ Print Invoice and WO in Black and White?
- ☐ Do not show cost on pick list?
- ☐ Show work order number in bold on printed work order?
- ☒ Show work cash back on printed invoice?
- ☐ Hide the discount on printed invoice?

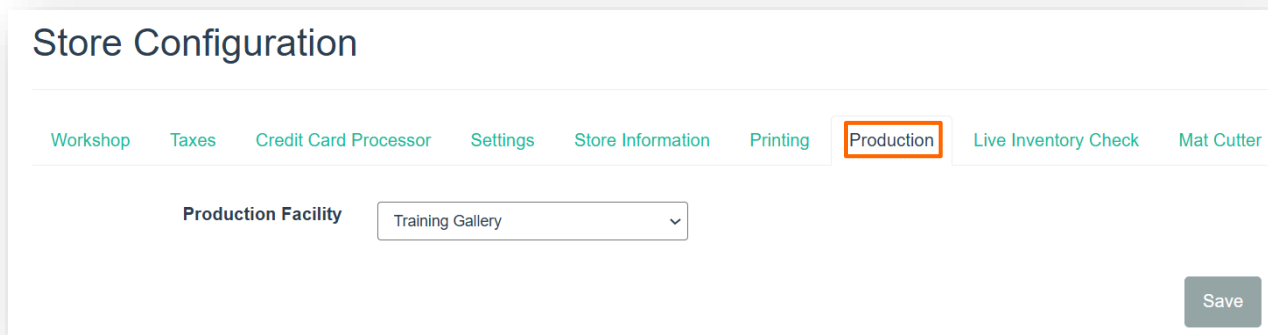
Alternate Workorder
Format:
Save

Store Configuration – Printing Tab

Production

Designate a store's production facility location. (Multi-Store)

1. Select **Location Name** in the drop-down list.
2. Touch/Click **Save**.



The screenshot shows a web application interface titled "Store Configuration". Below the title is a horizontal menu with several tabs: "Workshop", "Taxes", "Credit Card Processor", "Settings", "Store Information", "Printing", "Production", "Live Inventory Check", and "Mat Cutter". The "Production" tab is highlighted with an orange border. Below the menu, there is a label "Production Facility" followed by a dropdown menu. The dropdown menu is open, showing the text "Training Gallery" and a downward arrow. In the bottom right corner of the form, there is a "Save" button.

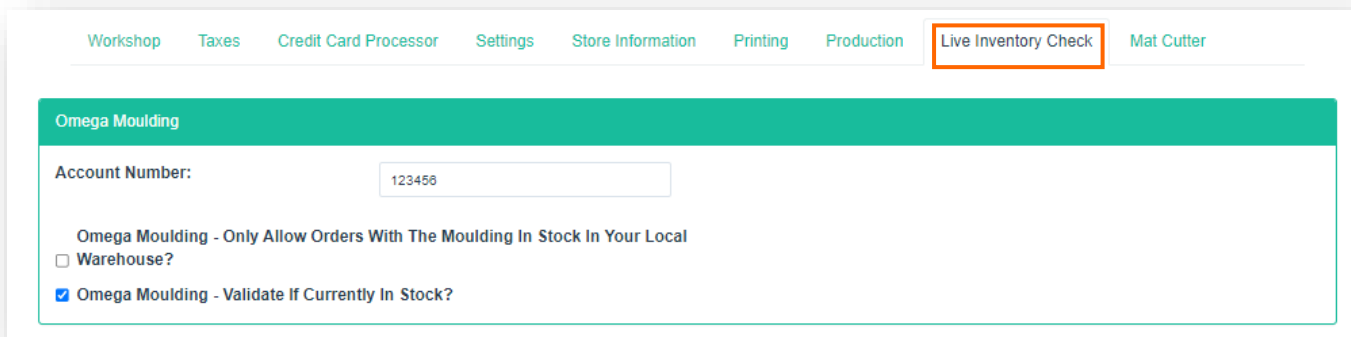
Store Configuration - Production Tab

Live Inventory Check

Verify warehouse moulding availability in real time. Includes the following moulding companies: Omega, Larson Juhl & Roma.

Omega -Activate Live Inventory Check

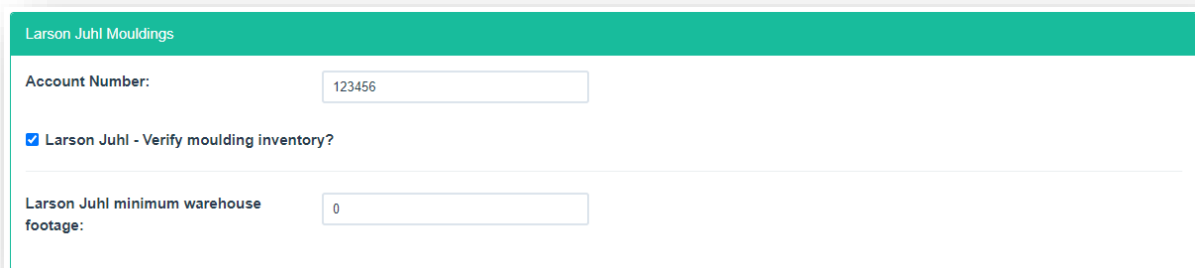
1. Touch/Click Store Configuration.
2. Touch/Click the **Live Inventory Check** tab.
3. Type your **Account Number** into the field provided.
4. **Select** the box **“Omega Moulding - Only allow orders with the moulding in stock in your local warehouse.”** Select this option if you do not want to search other warehouse locations.
5. **Select** the box **“Omega Moulding – Validate if currently in stock.”** Select this option if you want to search other warehouse locations.
6. Select **Save**



The screenshot shows a software interface with a top navigation bar containing tabs: Workshop, Taxes, Credit Card Processor, Settings, Store Information, Printing, Production, **Live Inventory Check** (highlighted with an orange border), and Mat Cutter. Below the navigation bar is a form titled "Omega Moulding". The form contains an "Account Number:" label followed by a text input field containing "123456". Below this is a section with two checkboxes: "Omega Moulding - Only Allow Orders With The Moulding In Stock In Your Local Warehouse?" (unchecked) and "Omega Moulding - Validate If Currently In Stock?" (checked).

Larson Juhl – Activate Live Inventory Check

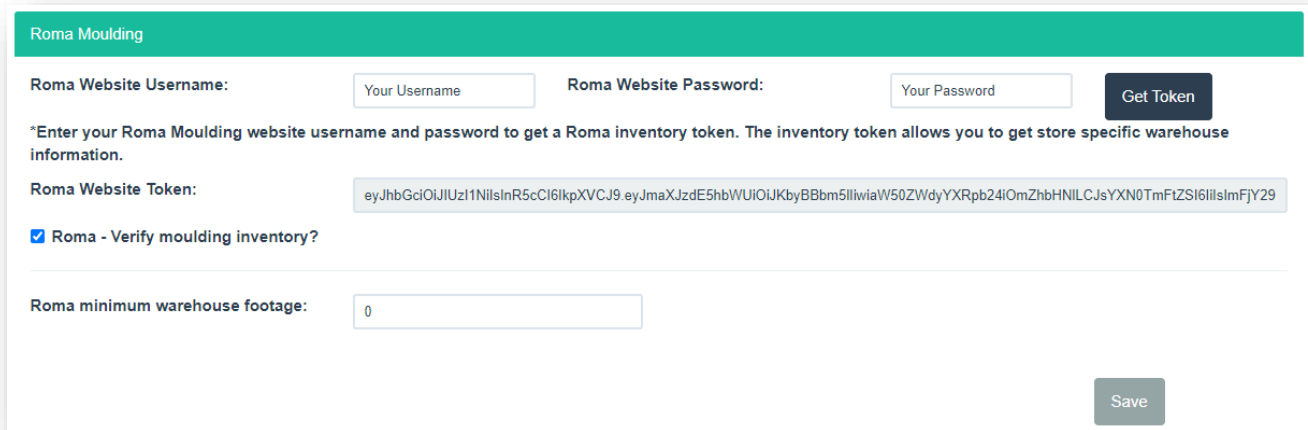
1. Type your Account number in the field provided.
2. Select Larson Juhl – Verify moulding inventory.
3. Larson Juhl Minimum Warehouse Footage: The minimum footage is the point at which you want to get the warnings. **Tip:** Type in 5000.
4. Touch/Click Save



The screenshot shows a software interface with a form titled "Larson Juhl Mouldings". The form contains an "Account Number:" label followed by a text input field containing "123456". Below this is a checkbox labeled "Larson Juhl - Verify moulding inventory?" which is checked. At the bottom of the form is a label "Larson Juhl minimum warehouse footage:" followed by a text input field containing "0".

Roma – Activate Live Inventory Check

1. Roma Website Username: Type your **Username** in the field provided.
2. Roma Website Password: Type you **Password** in the field provided.
3. Touch/Click the **Get Token** button. Token will auto fill in the Roma Website Token field.
4. Select **Roma – Verify moulding inventory**.
5. Roma Minimum Warehouse Footage: The minimum footage is the point at which you want to get the warnings.
Tip: Type in 5000
6. Touch/Click **Save**.



The screenshot shows a web form titled "Roma Moulding" with a teal header. The form contains the following elements:

- Roma Website Username:** A text input field with the placeholder "Your Username".
- Roma Website Password:** A text input field with the placeholder "Your Password".
- Get Token:** A dark blue button.
- Instruction:** A line of text stating: "*Enter your Roma Moulding website username and password to get a Roma inventory token. The inventory token allows you to get store specific warehouse information."
- Roma Website Token:** A text input field containing a long alphanumeric string: "eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJmaXJzdE5hbWUiOiJKbyBBbm5liiwiaW50ZWdyYXRpb24iOmZhbHNILCJsYXN0TmFtZSI6ImlmFjY29".
- Roma - Verify moulding inventory?:** A checkbox that is checked.
- Roma minimum warehouse footage:** A text input field with the value "0".
- Save:** A grey button located at the bottom right of the form.

Mat Cutter


1. Touch/Click **Store Configuration**.
2. Touch/Click the **Mat Cutter** located in your shop.
3. Touch/Click **Save**.

Store Configuration

Workshop Taxes Credit Card Processor Settings Store Information Printing Production Live Inventory Check **Mat Cutter**

Valiani Mat Cutter: ☒

Wizard Mat Cutter: ☐



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Save

Security – Store Admin Function

Register, Edit or Delete store users/employees. Designate the menu options they are allowed to perform.

1. Touch/Click on Security located in the blue bar top left.

Note: The screen will display the current users in the store.

Active Users

UserName	FirstName	LastName	Email			
eddie	Eddie	Employee	ee@yahoo.com	Roles	Delete	Edit
tristantrainee	Tristan	Trainee	tristan@gmail.com	Roles	Delete	Edit

Add User AccountChange Password

Add User Account

1. Touch/Click **Add User Account** button.
2. Touch/Click Fields to complete: **Name, Last Name, Username, Email, Password, Re-Confirm Password.**

Add User

FirstName	<input type="text" value="Emma"/>
LastName	<input type="text" value="Employee"/>
UserName	<input type="text" value="EE2"/>
Email	<input type="text" value="eemployee@gmail.com"/>
Password	<input type="password" value="*****"/>
Confirm password	<input type="password" value="*****"/>

Register

Add User

3. Touch/Click the **Register** button.

Note: This will take you back to the Security Active Users screen. The User just added should appear in the list.

Active Users

User Groups

UserName	FirstName	LastName	Email				
Debbi	Debbi	Babb	debbiababb@gmail.com	Roles	Stores	Delete	Edit
Elsa	Elsa	Employee	Elsa@gmail.com	Roles	Stores	Delete	Edit
Eliza	Eliza	Employee	Eliza@gmail.com	Roles	Stores	Delete	Edit
Freddie	Freddie	Frame	FF@gmail.com	Roles	Stores	Delete	Edit
tiffanytrainee	Tiffany	Trainee	dbabb@lifesaversoft.com	Roles	Stores	Delete	Edit

Add User Account

Change Password

Security - Active Users

Individual

- 1. To *select role assignments* Touch/Click the **Roles** button.
- 2. To *restrict a user's permissions*. Touch/Click on the **field box** to the left of the roles to **de-select**.

***Note:** Roles can be edited at any time.*

- 3. Ensure that you de-select **Store Admin** role if you do not want the user to have access to the security menu.

<input type="checkbox"/>	StoreAdmin	The store administrator. This role has all rights to the system and users. This is the only role that has access to the change security options
--------------------------	------------	---

Store Admin Security Role

- 4. Touch/Click the **Save** button. **Log Out** and **Log Back In** to have role changes to take effect.

Note: The below four images will display on one screen. Scroll to view.

Roles for user: Elsa

User Group:

Choose...

Apply

Select Role Assignments

Role Type	Create	Allow Deactivation?	Edit	View
Art Condition	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Art Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Customer Database	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Glazing Configuration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Mat Configuration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Moulding Configuration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Specials Configuration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Vendor Markup	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>

Store Management Roles

Role Type	Selection	Description
Change Stores	<input type="checkbox"/>	This role has the right to change stores
Inventory Management	<input type="checkbox"/>	This role has the ability to manage inventory
Manager Override	<input type="checkbox"/>	This role has the right to perform manager override functions
Manager Override Reason Codes	<input type="checkbox"/>	This role has the rights to edit Manager Override Reason Codes
Store Configuration	<input type="checkbox"/>	This role has the rights to edit Store Configuration
Status Manager	<input type="checkbox"/>	This role has the right to create statuses
Status Types	<input type="checkbox"/>	This role has the right to edit production / order statuses
Fabric	<input type="checkbox"/>	This role has the right to edit fabric configuration details
Giftcards	<input type="checkbox"/>	This role has the ability to edit gift card configuration details
Package Price	<input type="checkbox"/>	This role has the ability to edit package price configuration details
Printing Services	<input type="checkbox"/>	This role has the right to edit print services configuration details
Promotions	<input type="checkbox"/>	This role has the rights to edit Promotions
Void Invoice	<input type="checkbox"/>	This role has the right to void invoices
Store Reporting	<input type="checkbox"/>	The role has the right to view general store level reports

Admin and Security

Role Type	Selection	Description
Store Admin	<input type="checkbox"/>	The store administrator. This role has all rights to the system and users. This is the only role that has access to the change security options
Customer Type Admin	<input type="checkbox"/>	This role has the right to create new customer types
Customer Export Report	<input type="checkbox"/>	This role allow you to run the customer export report
Database Maintenance	<input type="checkbox"/>	This role has the rights to do Database Maintenance
Enterprise Reports	<input type="checkbox"/>	This role has the ability to view enterprise reports

Enterprise Report Access

Role Type	Selection	Description
Assembly Times	<input type="checkbox"/>	The role has the right to view enterprise level assembly time reports
Cancelled Orders	<input type="checkbox"/>	The role has the right to view enterprise level cancelled order reports
Customer Contact Details	<input type="checkbox"/>	The role has the right to view enterprise level customer contact details reports
Financial Summary	<input type="checkbox"/>	The role has the right to view enterprise level financial summary reports
Past Due and Undelivered Orders	<input type="checkbox"/>	The role has the right to view enterprise level Past Due and Undelivered reports
Pricing Profile Deployment	<input type="checkbox"/>	The role has the right to view enterprise level Pricing Deployment reports
Promotion Summary	<input type="checkbox"/>	The role has the right to view enterprise level Promotion Summary reports
Sales By Status (Delivery)	<input type="checkbox"/>	The role has the right to view enterprise level Sales by Status - Delivery reports
Sales By Status (Production)	<input type="checkbox"/>	The role has the right to view enterprise level Sales by Status - Production reports
Ticket Aging	<input type="checkbox"/>	The role has the right to view enterprise level Ticket Aging reports

Save

Save and login again to have changes take effect

Stores

For multiple locations. Select stores that your employee has permission to log into.

- 1. Touch/Click the **Stores** button on the corresponding employee line item.
- 2. Touch/Click **Store Location(s)/Number(s)**. Touch/Click the **Done** button.

User Groups

Create and Set security roles by user group. **Example Demo:** Create Group and Set Roles for those in a sales position.

Create

- 1. Touch/Click on **Security** located in the blue bar top left.
- 2. Touch/Click **User Group** located upper right corner.

UserName	FirstName	LastName	Email	Roles	Stores	Delete	Edit
emma	Emma	Employee	emma@gmail.com				
edwin	Edwin	Employee	eddie@gmail.com				
Mike	Mike	Labbe	mike@getthepictureframing.com				
Paul	Paul	Thomas	pothomas@lifesaversoft.com				
tristantrainee	Tristan	Trainee	tristan@gmail.com				

Buttons: Add User Account, Change Password, User Groups

Security – Create User Group

- 3. Touch/Click into the User Group Name field. **Type Name**. Touch/Click **Create**.

User Groups

Sales [Create]

Management [Edit] [Deactivate]

Security – Create User Group

- 4. The **Sales** Group has now been created.

5. Touch/Click the **Edit** button to the right of Sales.

User Groups

Name Create

Management		
	Edit	Deactivate
Sales	Edit	Deactivate

Security – User Group Sales

6. Touch/Click the **Field** box to the left of the operations they are allowed to perform. Touch/Click the **Done** button.

Edit User Group

Group Name:

<input type="checkbox"/> StoreAdmin	<input type="checkbox"/> MatConfigurationDeactivate	<input type="checkbox"/> GlazingConfigurationView
<input type="checkbox"/> GlazingConfigurationEdit	<input type="checkbox"/> GlazingConfigurationDeactivate	<input type="checkbox"/> SpecialsConfigurationView
<input type="checkbox"/> SpecialsConfigurationDeactivate	<input type="checkbox"/> VendorMarkupView	<input type="checkbox"/> VendorMarkupEdit
<input type="checkbox"/> VendorMarkupDeactivate	<input checked="" type="checkbox"/> CustomerDatabaseView	<input checked="" type="checkbox"/> ArtConditionView
<input type="checkbox"/> ArtConditionEdit	<input type="checkbox"/> ArtConditionDeactivate	<input checked="" type="checkbox"/> ArtTypeView
<input type="checkbox"/> ArtTypeEdit	<input checked="" type="checkbox"/> CustomerDatabaseCreate	<input type="checkbox"/> MouldingConfigurationCreate
<input type="checkbox"/> MatConfigurationCreate	<input type="checkbox"/> GlazingConfigurationCreate	<input type="checkbox"/> SpecialsConfigurationCreate
<input checked="" type="checkbox"/> CustomerDatabaseEdit	<input type="checkbox"/> VendorMarkupCreate	<input type="checkbox"/> ArtTypeCreate
<input type="checkbox"/> ArtConditionCreate	<input type="checkbox"/> ArtTypeDeactivate	<input type="checkbox"/> ManagerOverride
<input type="checkbox"/> DatabaseMaintenance	<input type="checkbox"/> Promotions	<input type="checkbox"/> StoreConfiguration
<input type="checkbox"/> ManagerOverrideReasonCodes	<input type="checkbox"/> InventoryManagement	<input type="checkbox"/> CustomerDatabaseDeactivate
<input type="checkbox"/> VoidInvoice	<input type="checkbox"/> ChangeStore	<input type="checkbox"/> CustomerTypeAdmin
<input type="checkbox"/> StatusAdmin	<input type="checkbox"/> Fabric	<input checked="" type="checkbox"/> PrintServices
<input type="checkbox"/> StatusTypes	<input type="checkbox"/> EnterpriseReports	<input checked="" type="checkbox"/> GiftCards
<input type="checkbox"/> CustomerExport	<input type="checkbox"/> MouldingConfigurationView	<input type="checkbox"/> MouldingConfigurationEdit
<input type="checkbox"/> MouldingConfigurationDeactivate	<input type="checkbox"/> MatConfigurationView	<input type="checkbox"/> MatConfigurationEdit

Done

Security – Edit User Group

Assign User Group

1. Touch/Click on **Security** located in the blue bar top left.
2. Touch/Click the **Role** button on the corresponding employee's line item.

Active Users User Groups

UserName	FirstName	LastName	Email				
emma	Emma	Employee	emma@gmail.com	Roles	Stores	Delete	Edit

Security – Assign User Group

3. Touch/Click the **User Group Drop Down Arrow**. Touch/Click **User Group Name**. **Demo Example: Sales**

Roles for user: emma

User Group: Choose... Choose... Management Sales

Select Role Assignments

Apply

Security – Assign User Group - Sales

4. Touch/Click the **Apply** button.

Deactivate/Activate User Group

1. Touch/Click on **Security** located in the blue bar top left.
2. Touch/Click the **User Groups** button. User Groups will list. Touch/Click **Deactivate** button on the User Group line item that you would like to delete. **Demo Example: Sales**

User Groups

Name Create

Management	Edit	Deactivate
Sales	Edit	Deactivate

Security – Deactivate User Group

3. The Deactivate button will now display as **Activate**. To reinstate a deactivated user group, touch/click the **Activate** button on the corresponding line item.

User Groups

Name Create

Management	Edit	Deactivate
Sales	Edit	Activate

Security – Deactivate User Group

Change Password

1. Touch/Click **Password** button in the security screen.

Note: Will be changing the user's password that is currently logged into the program.

Active Users

UserName	FirstName	LastName	Email			
EE2	Emma	Employee	eemployee@gmail.com	Roles	Delete	Edit
eddie	Eddie	Employee	ee@yahoo.com	Roles	Delete	Edit
tristantrainee	Tristan	Trainee	tristan@gmail.com	Roles	Delete	Edit

Add User Account Change Password

Security – Active User

2. Touch/Click fields and complete: **Old Password, Password and Confirm Password.**
3. Touch/Click **Change Password** button.

Change your password

User Name trntrainee

Old Password

Password

Confirm password

Change Password

Security - Change Password

Edit Employee/User Profile

Edit User Name, First/Last Name or Email Address. In order to perform this function the user needs to have the below Store Admin Role selected in their role profile.

1. Touch/Click the **Edit** button on the desired employee/user line item in the Security Active Users screen.
- 2.Touch/Click into the field to be edited. Backspace current date. Type new data. Touch/Click the **Save** button.

Edit

EditUserViewModel

UserName ee1

FirstName Emma

LastName Employee

Email eemployee@gmail.com

Back to List Save

Edit Employee/User Profile

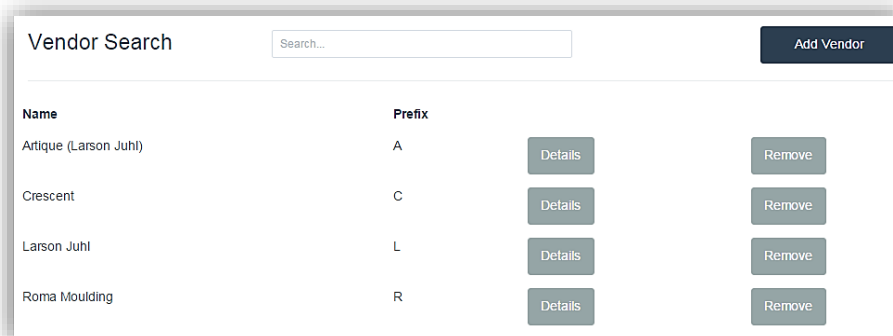
Add/Markup Vendor

Add moulding, mat and fabric vendors to your database. Create and Edit markup tables. Search vendor by name.

Add Vendor

1. Touch/Click on the **Vendor Markup** button on the LifeSaver Home screen.

Note: Vendors that are currently in your database are listed on this screen. The program already contains the following vendors: Artique, Larson Juhl, Crescent and Roma.



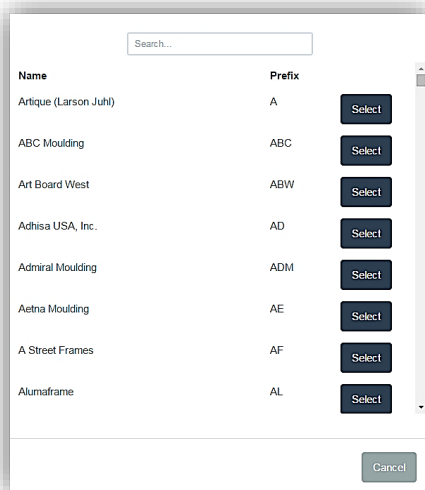
The screenshot shows a 'Vendor Search' window. At the top, there is a search bar with the placeholder text 'Search...' and an 'Add Vendor' button. Below the search bar is a table with two columns: 'Name' and 'Prefix'. The table lists four vendors: Artique (Larson Juhl), Crescent, Larson Juhl, and Roma Moulding. Each vendor entry has a 'Details' button and a 'Remove' button to its right.

Name	Prefix	Details	Remove
Artique (Larson Juhl)	A	Details	Remove
Crescent	C	Details	Remove
Larson Juhl	L	Details	Remove
Roma Moulding	R	Details	Remove

Vendor Markup – Search/Add Vendor

2. Touch/Click on the **Add Vendor** button.
3. Touch/Click on the **Select** button to the right of the desired Vendor name to add.

Tips: Touch/Click and drag the slider bar to scroll through the list of vendors. Can also search for the vendor. Type in the name, partial name or beginning letter of the vendor in the search field.



The screenshot shows an 'Add Vendor' window. At the top, there is a search bar with the placeholder text 'Search...'. Below the search bar is a list of vendors with two columns: 'Name' and 'Prefix'. The list includes: Artique (Larson Juhl), ABC Moulding, Art Board West, Adhisa USA, Inc., Admiral Moulding, Aetna Moulding, A Street Frames, and Alumaframe. Each vendor entry has a 'Select' button to its right. At the bottom right of the window is a 'Cancel' button.

Name	Prefix	Select
Artique (Larson Juhl)	A	Select
ABC Moulding	ABC	Select
Art Board West	ABW	Select
Adhisa USA, Inc.	AD	Select
Admiral Moulding	ADM	Select
Aetna Moulding	AE	Select
A Street Frames	AF	Select
Alumaframe	AL	Select

Add Vendor Window

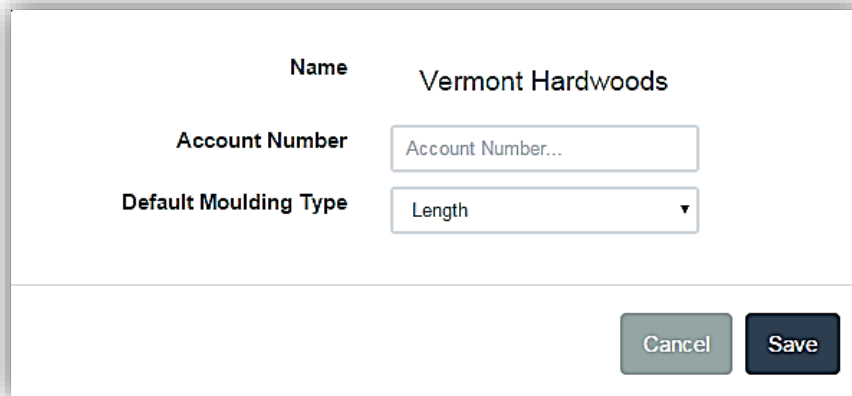
4. Touch/Click on the vendor's **Select** button that you would like to add to your database.
5. Touch/Click in the **Account Number** field and type in your vendor account number.
6. Touch/Click on the **Default Moulding/Mat drop down arrow** to **select the unit of measure** that you will predominately sell in your store for that particular vendor.

Touch/Click on desired type.

- Moulding Cuts Default Types: **Length, Chop, Join, Wedge and UI Group.**
- Mat Default Types: **Sheet and UI Group.**

Note: A moulding/mat's Unit of Measure Type can be changed in an individual workorder at any time. The default unit of measure can also be changed and saved at any time. Click on the vendor's detail button – Select a new unit of measurement in the Default Unit of Measure drop down list – Touch/Click the Save button. To remove vendor- Click/Touch the Remove button to the right of the vendor name.

7. Touch/Click the **Save** button.
8. To add additional vendors, repeat steps 2 – 7.



Name	Vermont Hardwoods
Account Number	Account Number...
Default Moulding Type	Length ▼

Cancel Save

Add Vendor - Account & Default Type

Markups

Our program contains default markups. We strongly encourage you to set your own markups that are appropriate for your store.

Set Moulding Markups

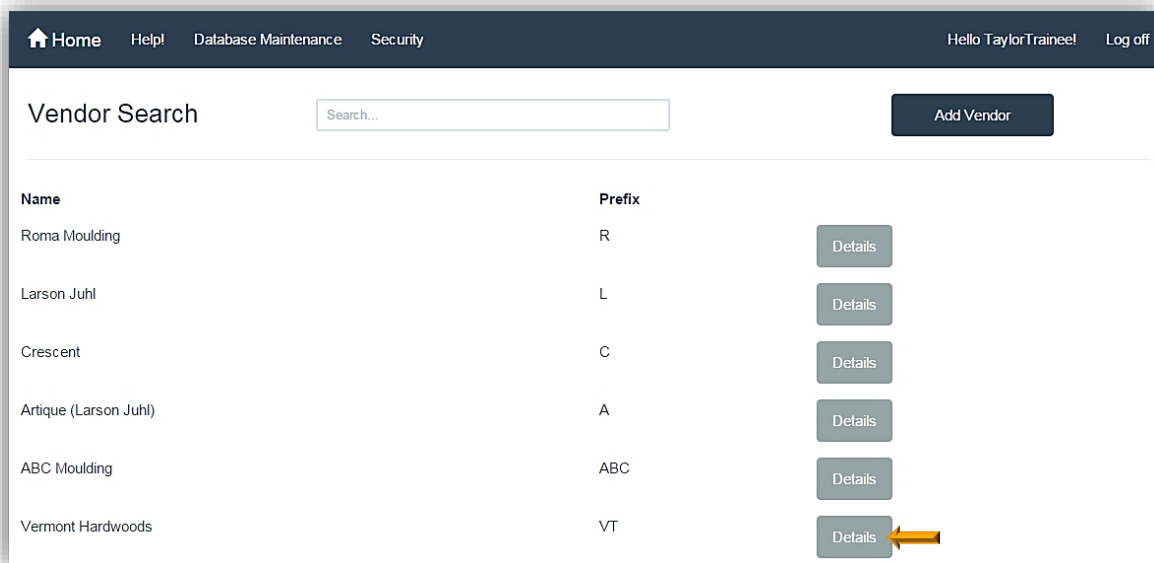
Set moulding markup tables for each vendor or a moulding default markup table across selected vendors that you just added to your database to determine your store's retail cost for each vendor's product line. You will set the markup for each vendor's moulding cut types and the default moulding cut that you will predominately be using in your store. The following are the cuts that are available in the moulding markup table: Chop, Join, Length, Cut Fillet and Straight Cut. If a vendor does not offer the cut, it will not appear in the markup table. The following categories can be set for each moulding cut's minimum price to maximum price range: Minimum Foot, Markup, Vendor Discount, Shipping Charges, Additional charges and Costing Method.

Set Moulding Markup Table

1. Touch/Click on the **Vendor Markup** button on the LifeSaver Home screen.

Note: Vendors that are currently in your database are listed on this screen.

2. Touch/Click on the **Vendor's Details** button. **Demo Example:** Vermont Hardwoods.



Vendor Markup - Vendor List - Details

- The Markup Table will open on the Chop tab. The following tabs are available: Chop, Join, Length, Cut Fillet, Straight Cut and Wedge. The markup table displayed on the screen does include default markups per minimum and maximum dollar amounts. The default markup amounts will need to be adjusted to reflect your store's pricing strategy. You will click on each tab that contains the moulding/mat unit of measure that you will sell in your store and set the markup. If the vendor does not offer that unit of measure a markup table will not be displayed.

Vendor Details for Larson Juhl Apply Default Markup

Moulding Default UOM: Length

Chop Join Length Wedge UI Group

Min Value	Max Value	Min Foot.	Markup	Discount
0.0000	1.9999	0.0000	3.10	.00
2.0000	2.9999	0.0000	3.00	.00
3.0000	3.4999	0.0000	2.90	.00
3.5000	3.9999	0.0000	2.80	.00
4.0000	4.4999	0.0000	2.70	.00
4.5000	4.9999	0.0000	2.60	.00
5.0000	5.4999	0.0000	2.50	.00
5.5000	5.9999	0.0000	2.40	.00
6.0000	6.4999	0.0000	2.30	.00
6.5000	6.9999	0.0000	2.20	.00
7.0000	7.4999	0.0000	2.10	.00
7.5000	9999.9999	0.0000	2.00	.00

Add Row

Save

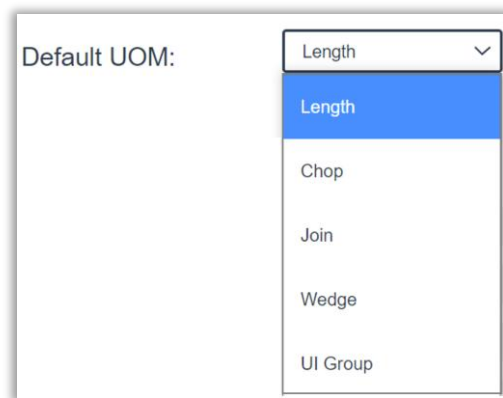
Vendor Details – Default Markup Table

- Set the Min. Foot, Markup and Discount for each Min. and Max Value line item. The Minimum Value, Maximum Value, and Markup fields can be adjusted.
- Touch/Click the **Min Value** field if you would like to change the current line-item value. Backspace existing data in fields to remove and type new value. (Starting \$ amount) **Demo Example: \$0.00**
- Touch/Click the **Max Value** field if you would like to change the current line-item value. Backspace existing data in fields to remove and type new value. Type in your Max Value (Ending \$ amount) **Demo Example: \$1.99**
- Touch/Click the **Min. Foot** field. Type in a Minimum Footage. Optional.

8. Touch/Click the **Markup** field to change markup amount. Backspace existing data in field to remove and type new markup amount. The moulding retail price reflected in the workorder will be determined by the markup amount multiplied by the moulding cost. (Product Cost x Markup = Retail Price)
9. Touch/Click **Discount** field. Type in the Discount percentage amount you receive from the vendor on your orders. Optional.
10. Touch/Click **Add Row** or **Save**. Repeat steps 4 – 10 to Add Markup Row.
11. Touch/Click **next moulding cut tab** that applies to the vendor. **Repeat above steps 4 - 10** to set up markup table.

12. The **Default Unit of Measure** located top right screen displays the option that you selected in the Add Vendor Screen. To select a different UOM.

- Touch/Click on the drop-down arrow.
- Touch/Click different UOM.



The screenshot shows a mobile application interface with a label 'Default UOM:' on the left. To its right is a dropdown menu. The menu is currently open, showing a list of options: 'Length' (which is highlighted with a blue background), 'Chop', 'Join', 'Wedge', and 'UI Group'. A small downward-pointing chevron icon is visible in the top right corner of the dropdown menu's header area.

13. Touch/Click **Save**.

Below is a demo example of the LSS Training Gallery’s Markup Table for Larson Juhl. We created ten starting and ending price ranges and set the markup for each row under the Length tab.

Note: Please do not use our example markups. You will need to determine the markups that are appropriate for your store.

Vendor Details for Decor Moulding

Apply Default Markup

Moulding

Default UOM: Length

Chop

Join

Length

Wedge

UI Group

Min Value	Max Value	Min Foot.	Markup	Discount
0.0000	0.9999	0.0000	5.40	.00
1.0000	1.4999	0.0000	4.60	.00
1.5000	1.9999	0.0000	4.40	.00
2.0000	2.9999	0.0000	4.30	.00
3.0000	3.9999	0.0000	4.10	.00
4.0000	4.9999	0.0000	3.90	.00
5.0000	6.9999	0.0000	3.60	.00
7.0000	8.9999	0.0000	3.40	.00
9.0000	9.9999	0.0000	3.20	.00
10.0000	9999.9999	0.0000	3.00	.00
Add Row				
Save				

Moulding – Completed Length Tab Markup Table by Vendor

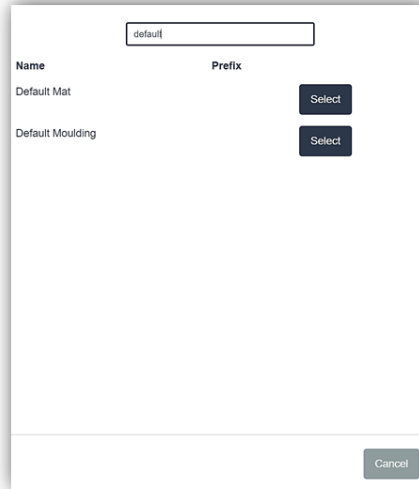
Set Default Moulding Markup Table to Selected Vendors

Set one markup table under the “vendor” named Default Moulding to apply the markup to selected or all moulding vendors.

1. Touch/Click on the **Vendor Markup** button on the LifeSaver Home screen.

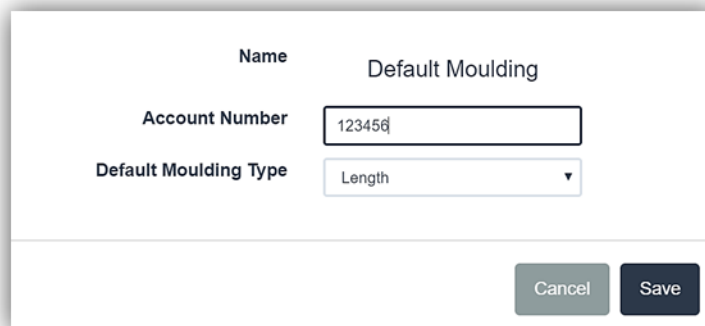
Note: Vendors that are currently in your database are listed on this screen.

2. Touch/Click the Add Vendor button.
3. Touch/Click **Default Moulding Details** in the vendor list.



Add “Default Vendor”

4. Touch/Click the **Account Number** field. Type any made up number into the field. Touch/Click the **Default Moulding** Type drop down arrow. Touch/Click Length, Chop, Join, Wedge, Straight Cut or Fillet. Touch/Click **Save**.



Add Vendor Account

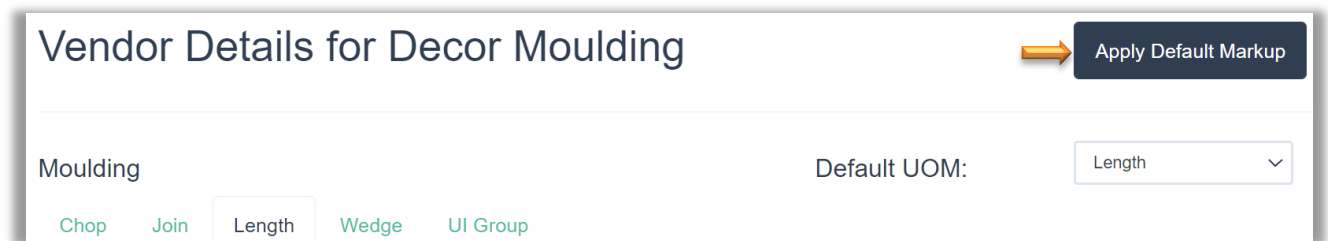
5. Follow the Set Moulding Markup instructional steps in the previous section.
6. Touch/Click **Save**.

Apply Default Markup to Moulding Vendor

1. Touch/Click on the **Vendor Markup** button on the LifeSaver Home screen.

Note: Vendors that are currently in your database are listed on this screen.

2. Touch/Click the **Vendor's Details** button that you would like to **Apply Default Markup**.
3. Touch/Click the **Apply Default Markup** button located upper right screen. Note that the previous markup table has changed and now reflects the Default Markup table.



Vendor Details for Decor Moulding

Apply Default Markup

Moulding

Default UOM: Length

Chop Join Length Wedge UI Group

4. Touch/Click the **Save** button.

Note: If you do not touch/click the Save button the default markup table will revert back to the original markup table set.

Set Mat Markups

Set mat markup tables for each mat vendor or a mat default markup table across selected vendors that you just added to your database to determine your store's retail cost for each vendors' product line. You will set the markup for the mat types that you will use in your store. The following mat types are available in the markup table: Pack, Cut Sheet, Sheet. If a vendor does not offer a mat type, it will not appear in the markup table. The following categories can be set for each: Minimum price to Maximum price range, Markup, Vendor Discount and Costing Method. The costing Methods available are Square Inch, Square Meter, United Inch, Sheet, Cut Sheet and Unknown.

Note: The following instructions are condensed, since setting the Mat Markup table and Mat Default Markup table is nearly identical to setting the Moulding Markup and Moulding Markup Default table. Refer to the section above titled Set Moulding Markups for detailed instructions.

Set Mat Markup Table

1. Touch/Click on the **Vendor Markup** button on the LifeSaver Home screen.

Note: Vendors that are currently in your database are listed on this screen.

2. Touch/Click on the **Vendor's Details** button. **Demo Example:** Crescent

3. Touch/Click on **Sheet or UI Group tab** to set markup table.

Note: Cut Sheet coming soon!

4. Touch/Click each **Min Value, Max Value & Markup** field to edit or add data. Select **Costing Method** for each row: **Square Inch, United Inch, Sheet or UI Grid.**

Tip: Backspace existing data in fields to remove and type new data.

5. Touch/Click the Add Row button to add additional mat values. If applicable.

6. Click on the **Save** button to save the completed markup table.

Vendor Details for Crescent

Apply Default Markup

Sheet

Sheet

UI Group

Square Inch

Square Inch

Square Inch

Square Inch

Square Inch

Square Inch

Square Inch

Square Inch

Add Row

Save

Mats

Sheet

UI Group

Min Value	Max Value	Markup	Discount
0.0000	5.0000	5.40	.00
5.0001	10.0000	4.60	.00
10.0001	15.0000	2.50	.00
15.0001	20.0000	4.30	.00
20.0001	30.0000	4.10	.00
30.0001	40.0000	3.90	.00
40.0001	50.0000	3.60	.00
50.0001	9999.9999	3.40	.00

Crescent Mat Markup Table - Sheet

Set Default Mat Markup Table to Selected Vendors

Set one markup table to apply to selected mat vendors.

1. Touch/Click on the **Vendor Markup** button on the LifeSaver Home screen.

Note: *Vendors that are currently in your database are listed on this screen.*

2. Touch/Click the **Add Vendor** button.
3. Touch/Click the “Vendor” **Default Mat Details** button in the vendor list.
4. Touch/Click the **Account Number** field. Type any made up number into the field. Touch/Click the **Default Mat** Type drop down arrow. Touch/Click **Sheet or UI Group**. Touch/Click **Save**.
5. Follow Set Mat Markup instructional steps 2 – 6 in the previous section.
6. Touch/Click **Save**.

Apply Mat Default Markup Table

1. Touch/Click on the **Vendor Markup** button on the LifeSaver Home screen.

Note: *Vendors that are currently in your database are listed on this screen.*

2. Touch/Click the **Vendor’s Details** button that you would like to **Apply Default Markup**.
3. Touch/Click the **Apply Default Markup** button located upper right screen.

Note *that the previous markup table has changed and now reflects the Default Markup table.*

5. Touch/Click the **Save** button.

Note: *If you do not touch/click the Save button the default markup table will revert back to the original markup table set.*

Set Fabric Markups

You will need to set your markups to each Fabric vendor you just added to your database to determine your store's retail cost for each vendors' product line. The following categories can be set for each: Minimum price to Maximum price range, Markup Amount and Vendor Discount. The costing method for fabric is calculated by yard.

1. Touch/Click on the **Vendor Markup** button on the LifeSaver Home screen.

Note: Vendors that are currently in your database are listed on this screen.

2. Touch/Click on the **Vendor's Details** button. **Demo Example:** Raphael's Master Source Fabric
3. Click/Touch each **Markup Category** field and add data.

Note: Backspace existing data in fields to remove and type new data.

7. Touch/Click each **Min Value, Max Value, Markup & Discount** field to edit or add data.

Tip: Backspace existing data in fields to remove and type new data.

4. Click the **Add Row** button to add additional Fabric values if applicable
5. Click on the **Save** button to save the completed markup table.

Vendor Details for Raphaels Master Source Fabric

Fabric

Min Value	Max Value	Markup	Discount
0.00	5.00	5.40	0
5.01	10.00	4.60	0
10.01	15.00	4.40	0
15.01	20.00	4.30	0
20.01	30.00	4.10	0
30.01	40.00	3.90	0
40.01	50.00	3.60	0
50.01	9999.9€	3.40	0

Add Row

Save

Fabric Markup Table

Apply Fabric Default Markup Table

1. Touch/Click on the **Vendor Markup** button on the LifeSaver Home screen.

Note: Vendors that are currently in your database are listed on this screen.

2. Touch/Click the **Vendor's Details** button that you would like to **Apply Default Markup**.

3. Touch/Click the **Apply Default Markup** button located upper right screen.

Note that the previous markup table has changed and now reflects the Default Markup table.

6. Touch/Click the **Save** button.

Note: If you do not touch/click the Save button the default markup table will revert back to the original markup table set.

Moulding

Add a moulding vendor. Search a moulding item code/description to display the moulding's details, such as description, vendor, size, type, cost, markup and retail price. Display selected vendor's moulding product list. Create and designate in-store stock moulding. The program automatically updates moulding product and price changes.

1. Touch/Click the Moulding button on the Main Menu.

Select Vendor -Search - Details

1. Touch/Click **Select Vendor** field drop down arrow. Touch/Click the **Vendor Name** that you would like to Search. All the moulding inventory for that vendor will list on the screen. **Demo Example: Roma**
2. The entire moulding product line for the selected vendor will list.

Tip: Touch/Click/Drag **Slider Bar to Scroll** through the list on the current page. Touch/Click **Arrows < >** adjacent to the page number to move to the **Next/Previous Page**.

3. Search vendor moulding: Type item number, color, width, moulding name, etc. into the Moulding Search field. The screen will auto fill with each value you type into the search field. Use the slider bar to scroll through the list.

Demo Example: Search and list all the Roma mouldings in the Ramino group. Type Ramino in the search field to find and list all Ramino mouldings.

The screenshot displays the 'Moulding Search' interface. At the top, there is a 'Select Vendor' dropdown menu set to 'Roma Moulding', a 'Moulding Search' text field containing 'ramind', and two buttons: 'Create Moulding' and 'Add Vendor'. Below this is a table with three columns: 'Name', 'Description', and 'UPC'. The table lists eight items, each with a 'Details' button to its right. A vertical scrollbar is on the right side of the table. At the bottom right, it says 'Page: 1' with a right arrow.

Name	Description	UPC
R100153	Ramino 2 1/2 Mahogany Lacquer with Gol	0
R10141001	SR- Ramino F 1/4 Satin Black	0
R10241000	SR- Ramino F 3/4 Satin Black	0
R10361001	SR- Ramino F 1/2 Satin Black	0
R10361009	SR- Ramino F 1/2 Opaque White	0
R10361067	SR- Ramino F 1/2 Belvinder Brown	0
R10361083	SR- Ramino F 1/2 French Vanilla	0
R104005	SR- Ramino 1 Black and Gold	0

Moulding Search

4. Touch/Click the **Details** button on the desired line item to view moulding details. **Demo Example: R100153**
5. The Moulding Details screen will display the following information. Touch/Click the **Back** button to return to the Main Moulding Menu.
 - a. Name
 - b. Description
 - c. Vendor
 - d. Width
 - e. Height
 - f. UPC
 - g. Bin
 - h. Moulding Type
 - i. Use in Art Cloud
 - Chop Cost
 - Join Cost
 - Length Cost
 - Other Cost
 - Chop Markup
 - Join Markup
 - Length Markup
 - Other Markup

Moulding Details

Name	R100153	Chop Cost	\$ 19.63
Description	Ramino 2 1/2 Mahogany Lacquer with Gol	Join Cost	\$ 0.00
Vendor	Roma Moulding ▼	Length Cost	\$ 12.60
Width	2.5	Other Cost	\$ 0
Height	0	Chop Markup	2
UPC	0	Join Markup	3.09999990463257
Bin		Length Markup	3
Moulding Type	Moulding ▼	Other Markup	3
Use in Art Cloud	<input type="checkbox"/>		

Back

Create Store Moulding

Moulding Details

Create Store Moulding

Classify a moulding as in stock store moulding or edit a vendor's moulding product details to customize for your store.

1. Touch/Click the **Moulding** button on the Main Menu.

Option 1: Classify the moulding as a “store moulding” and leave all product details as is.

- a. Touch/Click the appropriate **Moulding Vendor** in the drop-down list
- b. Type the Moulding Item Code in the **Moulding Search** field.
- c. Touch/Click the **Details** button on the desired line item.
- d. Touch/Click the **Create Store Moulding** button on the Moulding Details screen. The moulding will now list under the “vendor name” Store Moulding”.

Option 2: Assign a new item code and or description and designate as store moulding.

Demo Example: Larson Moulding: L432900 – Designate as Store Moulding and Edit the item code to LFFB175.

- a. Touch/Click the **Create Store Moulding** button.
- b. Touch/Click each moulding details field and enter corresponding data.
 - Name: Item Code
 - Description
 - Vendor: Select the moulding vendor.
Note: The only vendors available in the vendor drop down list are the ones currently downloaded in your program.
 - Width
 - Height
 - UPC
 - Bin
 - Moulding Type
 - Use in Art Cloud
 - Chop – Join – Length Costs
 - Chop – Join – Length – Other Markups
- c. Touch/Click the **Save** button.

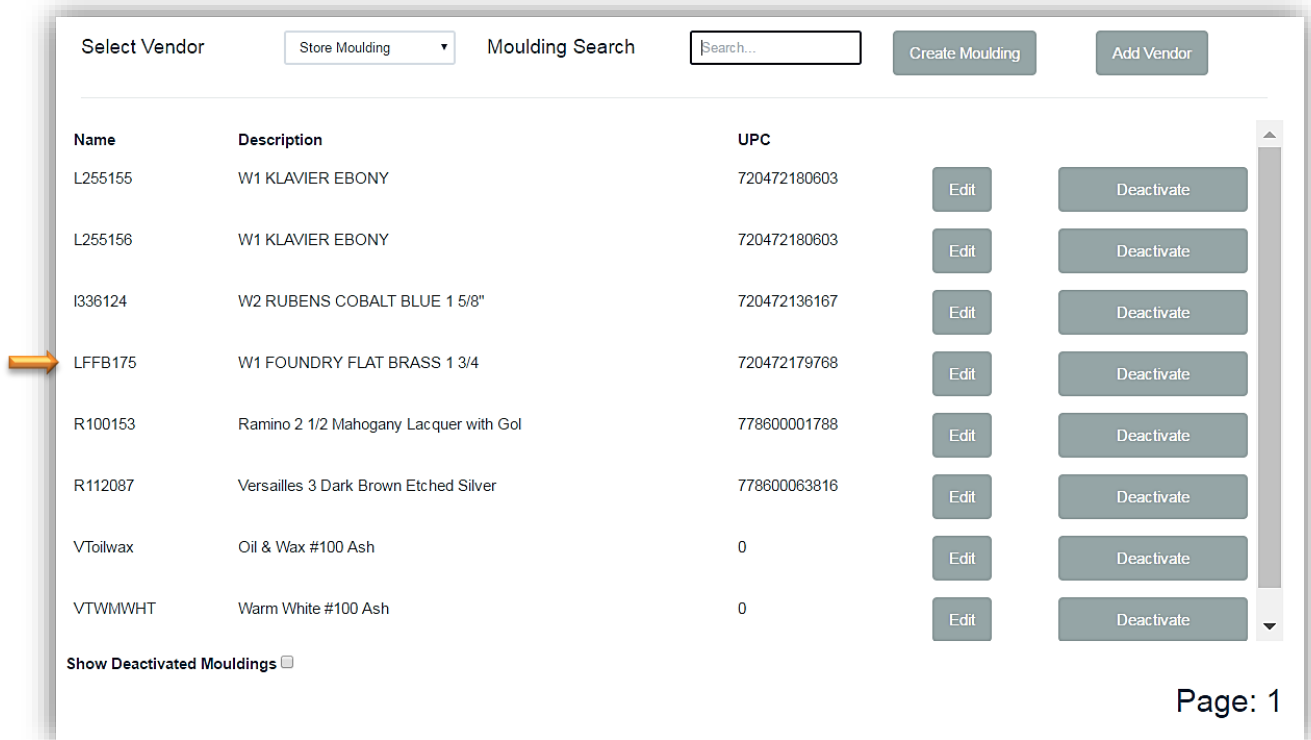
Create/Edit Store Moulding	
Name	LFFB175
Description	W1 FOUNDRY FLAT BRASS 1 3/4
Vendor	Larson Juhl
Width	1.75
Height	0
UPC	720472179768
Bin	
Moulding Type	Moulding
Use in Art Cloud	<input type="checkbox"/>
Chop Cost	\$ 7.80
Join Cost	\$ 10.86
Length Cost	\$ 5.05
Other Cost	\$ 10.86
Chop Markup	2
Join Markup	2
Length Markup	3.59999990463257
Other Markup	3

Back Save

Create Store Moulding

d. The Moulding will now display in you **Store Moulding Inventory List**.

Note: Price and Product updates will not apply when the item code has been changed. The original item code will still exist under the corresponding vendor list. Pull up the original item's details to observe if any price/product changes have taken place.



The screenshot shows a web application interface for managing moulding inventory. At the top, there is a 'Select Vendor' dropdown menu set to 'Store Moulding', a 'Moulding Search' text box, and two buttons: 'Create Moulding' and 'Add Vendor'. Below this is a table with columns for 'Name', 'Description', and 'UPC'. Each row also has 'Edit' and 'Deactivate' buttons. An orange arrow points to the row with 'Name' LFFB175 and 'Description' W1 FOUNDRY FLAT BRASS 1 3/4. At the bottom left, there is a checkbox labeled 'Show Deactivated Mouldings'. At the bottom right, it says 'Page: 1'.

Name	Description	UPC	Edit	Deactivate
L255155	W1 KLAVIER EBONY	720472180603	Edit	Deactivate
L255156	W1 KLAVIER EBONY	720472180603	Edit	Deactivate
I336124	W2 RUBENS COBALT BLUE 1 5/8"	720472136167	Edit	Deactivate
LFFB175	W1 FOUNDRY FLAT BRASS 1 3/4	720472179768	Edit	Deactivate
R100153	Ramino 2 1/2 Mahogany Lacquer with Gol	778600001788	Edit	Deactivate
R112087	Versailles 3 Dark Brown Etched Silver	778600063816	Edit	Deactivate
VTollwax	Oil & Wax #100 Ash	0	Edit	Deactivate
VTWMMWHT	Warm White #100 Ash	0	Edit	Deactivate

Show Deactivated Mouldings ☐

Page: 1

Store Moulding Inventory List

Edit Store Moulding

Edit moulding details.

1. Touch/Click the **Edit** button on the desired moulding line item.
2. Touch/Click appropriate field to **Edit** on the Create/Edit Store Moulding screen - Backspace current data to remove – **Type New Data** into the field.
3. Touch/Click the **Save** button.

Activate – Deactivate Store Moulding

A store moulding can be Deactivated (Removed) and Activated (Added).

1. To Deactivate a Moulding on the list. Touch/Click the **Deactivate** button on the appropriate line item.

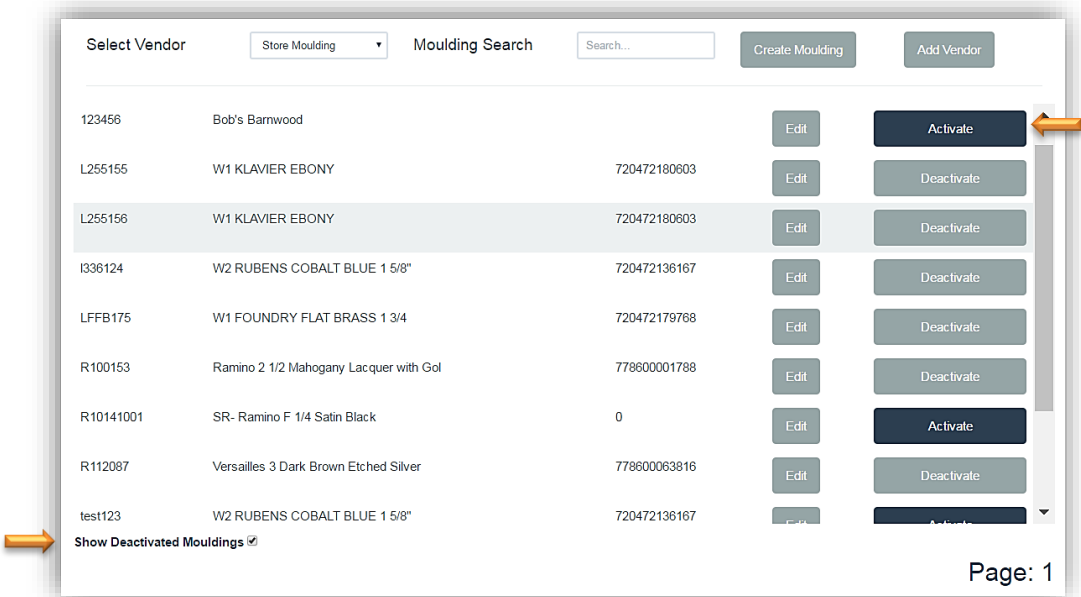
Note: Cannot use in a write order when deactivated.

Display Deactivated Mouldings

- 1. To display **Deactivated Mouldings** in the inventory list. Touch/Click **Show Deactivated Mouldings** option located bottom left screen.

Activate Store Moulding

- 1. To **Reactivate** a moulding that has been previously deactivated. Touch/Click **Show Deactivated Mouldings** option located bottom left screen. Touch/Click the **Activate** button on the appropriate line item.



Add Moulding Vendor

Refer to instructions in the Vendor Markup section.

Mat

Add a mat vendor. Search a mat item code/description to display the mat's details, such as description, vendor, size, type, cost, markup and retail price. Display selected vendor's mat product list. Create and designate in-store stock mats. The program automatically updates mat product and price changes.

1. Touch the Mat button on the Main Menu.

Select Vendor - Search - Details

1. Touch/Click **Select Vendor** field drop down arrow. Touch/Click the **Vendor Name** that you would like to Search. All the mat inventory for that vendor will list on the screen. **Demo Example:** Crescent

2. The entire mat product line for the selected vendor will list.

Tip: Touch/Click/Drag **Slider Bar to Scroll** through the list on the current page. Touch/Click **Arrows < >** adjacent to the page number to move to the **Next/Previous Page**.

3. **Search** vendor mat inventory. Type item number, color, width, mat name, etc. into the **Mat Search** field. The screen will auto fill with each value you type into the search field. Use the slider bar to scroll through the list.

Demo Example: Search and list the Crescent mats that include red in the color description. Type Red in the search field to find and list all Red Crescent mats.

The screenshot displays the 'Mat Search Screen' interface. At the top, there is a 'Select Vendor' dropdown menu set to 'Crescent' and a 'Mat Search' text input field containing the word 'red'. To the right of the search field are two buttons: 'Create Mat' and 'Add Vendor'. Below these elements is a table listing the search results. The table has three columns: 'Name', 'Description', and 'UPC'. Each row in the table includes a 'Details' button to the right of the 'UPC' column. A vertical scrollbar is located on the right side of the table. At the bottom right of the screen, it says 'Page: 1' followed by a right-pointing arrow.

Name	Description	UPC
C1042	Williamsburg Red	93924201707
C1057	Redwood	93924201844
C1559	Redwood	93924105983
C1612	True Red	93924106415
C1673	Really Red	93924133701
C3214	Chinese Red	93924202209
C5510	Red Sky	93924169946
C5527	Deep Red	93924172694

Mat Search Screen

4. Touch/Click the **Details** button on the desired line item to view mat details. **Demo Example: C3214**

5. The Mat Details screen will display the following:

- | | |
|----------------|-------------------|
| a. Name | f. Ply |
| b. Description | g. UPC |
| c. Vendor | h. Costing Method |
| d. Sheet Size | i. Notes |
| e. Bin | |

Mat Details

Name	<input type="text" value="C1000"/>			Cost	<input type="text" value="8.41"/>
Description	<input type="text" value="Pompano Beach White"/>			Costing Method	<input type="text" value="Square Inch"/>
Vendor	<input type="text" value="Crescent"/>			Notes	<div></div>
Sheet Size:	<input type="text" value="40"/>	X	<input type="text" value="32"/>		
Bin	<input type="text"/>				
Ply	<input type="text" value="4"/>				
UPC	<input type="text" value="93924201219"/>				

Mat Details Screen

Create Store Mat

Classify a mat as in stock store mats or edit a vendor's mat product details to customize for your store.

1. Touch/Click the **Mat** button on the Main Menu.

Option 1: Classify the mat as a “store mat” and leave all product details as is.

- a. Touch/Click the appropriate **Mat Vendor** in the drop-down list.
- b. Type the Mat Item Code in the **Mat Search** field.
- c. Touch/Click the **Details** button on the desired line item.
- d. Touch/Click the **Create Store Mat** button on the Mat Details screen. The mat will now list under the “vendor name” Store Moulding.

Option 2: Assign a new item code and or description and designate as store mat.

Demo Example: *Crescent Mat: C1000 – Designate as Store Mat and Edit the item code to WM5555.*

- a. Touch/Click the **Create Store Mat** button on main mat screen.
- b. Touch/Click each mat detail field and enter corresponding/applicable data.

- | | |
|--|--------------------|
| • Name: Item Code | • Ply |
| • Description | • UPC |
| • Vendor: Select the mat's vendor. | • Use in Art Cloud |
| • Note: <i>The only vendors available in the vendor drop down list are the ones currently downloaded in your program.</i> | • Cost |
| • Sheet Size | • Markup |
| • Bin | • Measurement Type |
| | • Costing Method |
| | • Notes |

c. Touch/Click the **Save** button.

Create/Edit Store Mat

Name

WM5555

Description

Wedding White Signature

Vendor

Crescent

Sheet Size:

32

X

40

Bin

Ply

0

UPC

Use in Art Cloud

☐

Cost

15.00

Markup

1.5

Measurement Type

Inch

Costing Method

Square Inch

Notes

Create Store Mat

d. Touch/Click **Save** button.

e. New mat item name and description will display.

Note: Price and Product updates will not apply when the item code has been changed. The original item code will still exist under the corresponding vendor list. Pull up the original item’s details to observe if any price/product changes have taken place.

Select Vendor

Store Mat

Mat Search

Search...

Create Mat

Add Vendor

Name	Description	UPC
WM5555	Wedding White Signature	

Edit

Store Mat Inventory List

Edit Store Mat

Edit mat product details.

1. Touch/Click the **Edit** button on the desired mat line item.
2. Touch/Click appropriate fields to **Edit** on the Create/Edit Mat Details Screen - Backspace current data to remove – **Type New Data** into the field.
3. Touch/Click the **Save** button.

Add Mat Vendor

Refer to instructions in the Vendor Markup section.

Add a fabric vendor. Search a fabric item code/description to display the details, such as fabric type, name, description, UPC, vendor name and cost.

Select Vendor - Search - Details

1. Touch/Click **Select Vendor** field drop down arrow. Touch/Click the **Vendor Name** that you would like to Search. All the fabric inventory for that vendor will list on the screen. **Demo Example:** *Raphael's Master Source Fabric*
2. The entire fabric product line for the selected vendor will list. Use the slider bar to scroll through the list.
3. **Search** vendor fabric inventory. Type item number, name, color etc. into the **Fabric Search** field. The screen will auto fill with each value you type into the search field. Use the slider bar to scroll through the list.

Demo Example: Search and list all the Raphael fabrics that include Douppioni in the description. Type "Douppioni" in the search field to find and list all Douppioni Silk fabrics.

Select Vendor

Raphaels Master So ▾

Mat Search

douppioni

Add Vendor

Name	Description	UPC	
RP1005	Corinth Douppioni Silk	0	Details
RP1006	Chablis Douppioni Silk	0	Details
RP1010	Sand Douppioni Silk	0	Details
RP1015	Black Douppioni Silk	0	Details
RP1018	Pale Yellow Douppioni Silk	0	Details
RP1029	Passionberry Douppioni Silk	0	Details
RP1100	Oyster Douppioni Silk	0	Details
RP1116	New White Douppioni Silk	0	Details

Fabric Search Screen

4. **Details.** Touch/Click **Details** button on the Fabric line item. **Demo Example:** *RP1005 Corinth Douppioni Silk*

Fabric Details

Name:	RP1005
Description:	Corinth Douppioni Silk
UPC:	0
Vendor Name:	Raphaels Master Source Fabric
Cost:	29.40

Back

Fabric Details Screen

Add Fabric Vendor

Refer to instructions in the Vendor Markup section.

Glazing

TruVue glazing has already been added to the program. The markup tables do have to be created for the TruVue glazing type, size, cost and markup. Additional glazing and mirrors can be added by using the Create Glazing button.

1. Touch/Click on the **Glazing** button on the Home screen.

Search

1. Type in Glazing by Name, Description, Substrate or Category in the Search field.
2. List will appear that contains your search word(s).

Glazing Search

Search... Create Glazing Show Deactivated Glazings ☐

Name	Description	Substrate	Category		
AR Reflection Free®	AR Reflection Free®	Glass	StandardReflectionControl	Details	Deactivate
Conservation Clear®	Conservation Clear®	Glass	ConservationClear	Details	Deactivate
Conservation Clear® Acrylic	Conservation Clear® Acrylic	Acrylic	ConservationClear	Details	Deactivate
Conservation Reflection Control®	Conservation Reflection Control®	Glass	ConservationReflectionControl	Details	Deactivate
Conservation Reflection Control® Acrylic	Conservation Reflection Control® Acrylic	Acrylic	ConservationReflectionControl	Details	Deactivate
Museum Glass®	Museum Glass®	Glass	ConservationMuseum	Details	Deactivate
Optium Acrylic®	Optium Acrylic®	Acrylic	StandardMuseum	Details	Deactivate
Optium Museum Acrylic®	Optium Museum Acrylic®	Acrylic	ConservationMuseum	Details	Deactivate

Glazing Search Screen

Set Glazing Markups

Set glazing markups for glass, mirror and acrylic. Additional cost/retail options under Bulk Adjust Pricing.

1. Touch/Click the **Details** button on the line item that contains the type of glazing you would like to set markup.

Demo Example: Conservation Clear.

Tip: Use the Search function or drag Scroll Bar to find the glazing type.

2. The Glazing Details screen will display the following at the top of the screen.
 - a. Glazing Name/Type
 - b. Substrate: Glass, Mirror or Acrylic
 - c. **Costing Method: Lite, United Inch, Square Inch or Square Meter.**
 - d. **Minimum Retail Amount**
 - e. Description: Glazing Type
 - f. Category: Glazing Type
 - g. **Default Costing Method: Lite, United Inch, Square Inch or Square Meter.**
3. **Costing Method.** Touch/Click the drop-down arrow and Select **Lite, United Inch, Square Inch or Square Meter** to display corresponding markup table.

Demo Example: Lite

***Note:** The costing method can be different for different types of glazing. The demo example is pricing the Conservation Clear by Lite price. It is not necessary to complete the markup tables for each costing method.*
4. **Minimum Retail Amount:** Touch/Click the field and type minimum glazing retail amount. ***Demo Example: \$20.00***
5. **Default Costing Method:** Touch/Click the drop-down arrow and Select **Lite, United Inch, Square Inch or Square Meter**. The workorder will calculate the retail price based on the default costing method selected and the corresponding markup table.

Glazing Details

Name	Conservation Clear®	Description	Conservation Clear®
Substrate	Glass	Category	ConservationClear
Costing Method	Lite	Default Costing Method	Lite
Min Retail Amount	20	Bulk Adjust Pricing	

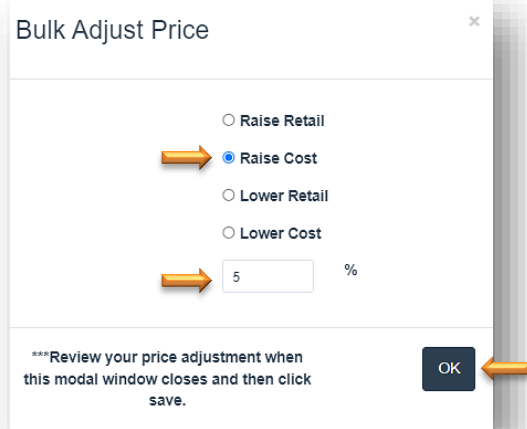
Bulk Adjust Pricing

Add a number in the percentage field to raise or the lower glazing cost or glazing retail markup. *Demo Example: Raise Museum glazing cost by 5%.*

1. Touch/Click the glazing line item that you would like to Adjust the Bulk Pricing on.
2. On the Glazing Details page, touch/click **Bulk Adjust Pricing** button.
3. Touch/Click **Retail Cost**.

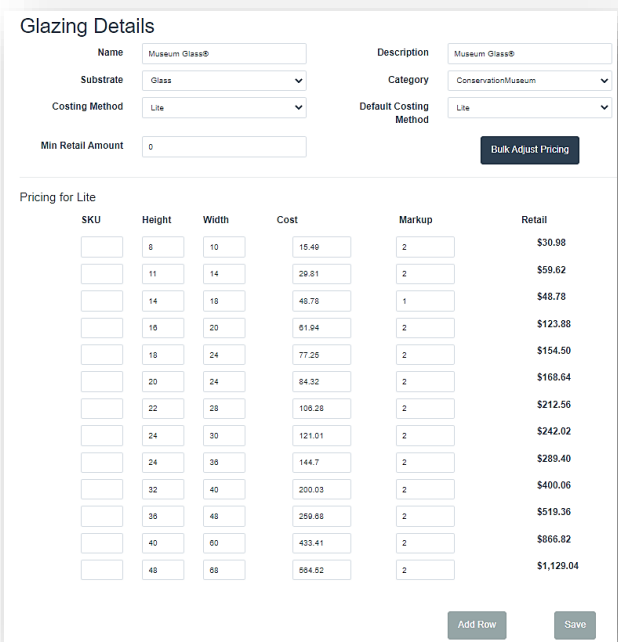
4. Enter **Number** in percentage field. Can be edited at anytime.

5. Touch/Click **OK**.



A modal window titled "Bulk Adjust Price" with a close button (X) in the top right corner. It contains four radio button options: "Raise Retail", "Raise Cost" (selected), "Lower Retail", and "Lower Cost". Below these options is a text input field containing the number "5" followed by a percentage symbol "%". At the bottom, there is a text prompt: "***Review your price adjustment when this modal window closes and then click save." and an "OK" button.

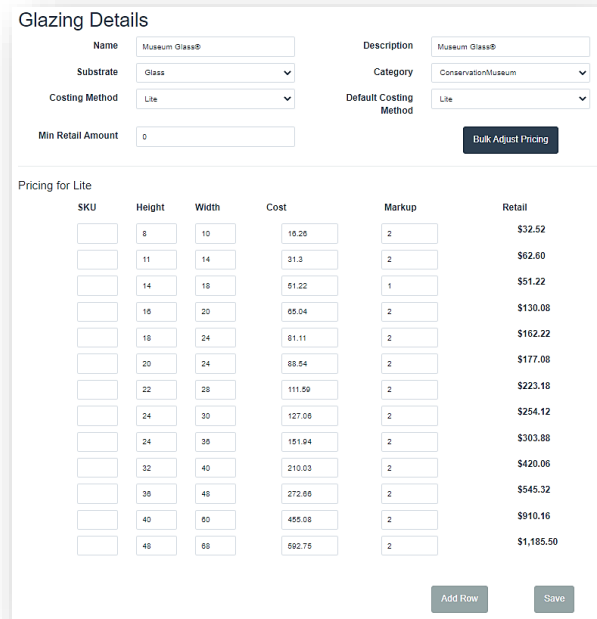
6. Note that the Cost and Retail Price has increased by 5 percent. Touch/Click **Save** button to save changes.



Glazing Details form showing pricing for "Museum Glass®". The form includes fields for Name, Substrate (Glass), Costing Method (Lite), Description, Category (Conservation/Museum), and Default Costing Method (Lite). A "Bulk Adjust Pricing" button is visible. Below the form is a table titled "Pricing for Lite" with columns for SKU, Height, Width, Cost, Markup, and Retail. The table contains 16 rows of data.

SKU	Height	Width	Cost	Markup	Retail
	8	10	15.49	2	\$30.98
	11	14	29.81	2	\$59.62
	14	18	48.78	1	\$48.78
	16	20	61.94	2	\$123.88
	18	24	77.25	2	\$154.50
	20	24	84.32	2	\$168.64
	22	28	106.28	2	\$212.56
	24	30	121.01	2	\$242.02
	24	36	144.7	2	\$289.40
	32	40	200.03	2	\$400.06
	36	48	259.68	2	\$519.36
	40	60	433.41	2	\$866.82
	48	68	864.52	2	\$1,129.04

Before Bulk Glazing Adjustment



Glazing Details form showing pricing for "Museum Glass®" after a 5% bulk adjustment. The form includes fields for Name, Substrate (Glass), Costing Method (Lite), Description, Category (Conservation/Museum), and Default Costing Method (Lite). A "Bulk Adjust Pricing" button is visible. Below the form is a table titled "Pricing for Lite" with columns for SKU, Height, Width, Cost, Markup, and Retail. The table contains 16 rows of data, with the Cost and Retail values increased by 5% compared to the previous state.

SKU	Height	Width	Cost	Markup	Retail
	8	10	16.26	2	\$32.52
	11	14	31.3	2	\$62.60
	14	18	51.22	1	\$51.22
	16	20	65.04	2	\$130.08
	18	24	81.11	2	\$162.22
	20	24	88.54	2	\$177.08
	22	28	111.59	2	\$223.18
	24	30	127.06	2	\$254.12
	24	36	151.04	2	\$303.88
	32	40	210.03	2	\$420.06
	36	48	272.66	2	\$545.32
	40	60	455.08	2	\$910.16
	48	68	902.75	2	\$1,185.50

After Bulk Glazing Adjustment

Create/Edit Existing Glazing Markup Table

Some of the glazing types under the costing method lite already contain the sizes available, cost and markup as our demo example Conservation Clear Glazing does. All fields can be edited. The cost and markup field will need to be changed to reflect your store's cost and markup.

If the height and width fields are appropriate for your store skip the adjustment.

Edit Existing Markup Table

1. Touch/Click Sku field. Type **Sku**. (Optional)
1. Touch/Click **Height** field. To edit the Height backspace current data to delete. Type new height measurement.
2. Touch/Click **Width** field. To edit the Width backspace current data to delete. Type new height measurement.
3. Touch/Click **Cost** field. To edit the Cost backspace current data to delete. Type new Cost.

Note: Cost is the price your distributor charges you for the glazing.

4. Touch/Click on **Markup** field. To edit the Markup backspace current data to delete. Type new Markup amount.

(Product Cost x Markup = Retail Price)

5. **Repeat steps 1 through 4** to edit additional line items.
6. Click on the **Save** button when finished.

Note: To **Delete a Row:** Touch/Click each field and backspace existing data to Remove Height, Width, Cost & Markup.

Add New Glazing Markup Table

If there is no markup table displayed for the glazing type/costing method, follow the below steps to add

1. Touch/Click the **Add Row** button.

Note: If the table contains one row only that lists a markup for all dollar amounts. Edit the row, before adding a new row.

2. Touch/Click Sku field. Type **Sku**. (Optional)
3. Touch/Click **Height** field. Type height measurement.
4. Touch/Click **Width** field. Type width measurement.

5. Touch/Click **Cost** field. Type cost amount.
6. Touch/Click **Markup** field. Type markup amount.
7. Touch/Click **Add Row** and **Repeat steps 2 – 5** if needed.
8. Touch/Click **Save** button.

Note: Please do not use our example cost and glazing markups in the table below. You need to determine the glazing markups that are appropriate for your store and add your distributor's TruVue Glazing Cost.

Glazing Details

Name

Conservation Clear®

Description

Conservation Clear®

Substrate

Glass

Category

ConservationClear

Costing Method

Lite

Pricing

SKU	Height	Width	Cost	Markup	Retail
	11	14	\$ 14.92	1	\$ \$14.92
	14	18	\$ 24.41	1	\$ \$24.41
	18	24	\$ 28.84	1	\$ \$28.84
	20	24	\$ 30.69	1	\$ \$30.69
	22	28	\$ 37.52	1	\$ \$37.52
	24	30	\$ 40.49	1	\$ \$40.49
	28	32	\$ 46.73	1	\$ \$46.73
	24	36	\$ 48.07	1	\$ \$48.07
	32	40	\$ 62.84	1	\$ \$62.84
	36	48	\$ 74.5	1	\$ \$74.50
	40	60	\$ 168.62	1	\$ \$168.62
	48	96	\$ 229.41	1	\$ \$229.41

Add Row

Save

Set Glazing Vendor Markups

Create Glazing

Add your own glazing and mirrors.

1. Touch/Click on the **Create** button.
2. Touch/Click **Name** field: Type Name of item.
3. Touch/Click **Substrate** drop down arrow. Select **Glass, Mirror or Acrylic**.
4. Touch/Click **Cost Method** drop down arrow. Select **Lite, United Inch, Square Inch, or Square Meter**.

5. Touch/Click **Description** field: Type description of item.
6. Touch/Click **Category** drop down arrow. Select category.
7. Touch/Click **Add Row**.
8. Touch/Click **Height, Width, Cost** and **Markup** fields to **add data**.
9. Repeat steps 7 and 8 to add additional line items to the table.
10. Click on the **Save** button when complete.

Glazing Details

Name

Mary's Mirrors

Description

House Mirrors

Substrate

Mirror ▼

Category

Mirror ▼

Costing Method

Lite ▼

Pricing

SKU	Height	Width	Cost	Markup	Retail
<input type="text"/>	<input type="text" value="18"/>	<input type="text" value="24"/>	\$ <input type="text" value="50.00"/>	<input type="text" value="2"/>	\$ \$100.00
<input type="text"/>	<input type="text" value="24"/>	<input type="text" value="36"/>	\$ <input type="text" value="100.00"/>	<input type="text" value="2"/>	\$ \$200.00

Add Row

Save

Create Glazing Screen

Deactivate – Display Deactivated - Activate Glazing

A glazing can be Deactivated (Removed) and Activated (Added).

1. To **Deactivate a Glazing Type** on the list. Touch/Click the **Deactivate** button on the appropriate line item.

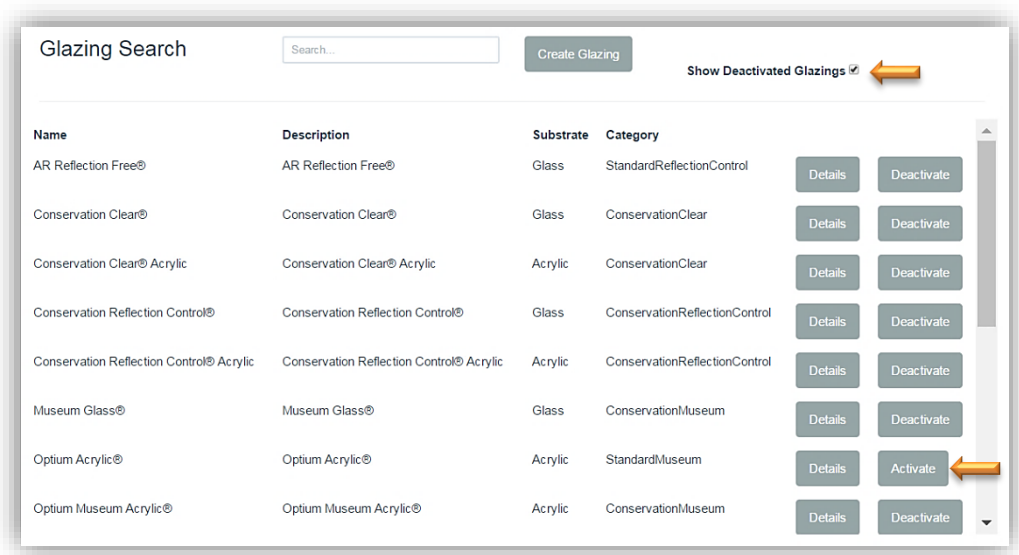
Note: *Cannot use in a write order when deactivated.*

Display Deactivated Glazing Type(s)

1. To display **Deactivated Mouldings** in the inventory list. Touch/Click **Show Deactivated Glazing** option located top right screen.

Activate Glazing Type(s)

1. To **Reactivate** a moulding that has been previously deactivated. Touch/Click **Show Deactivated Glazing** option located top right screen. Touch/Click the **Activate** button on the appropriate line item.



Glazing – Activate/Deactivate

Services - Specials

Services (Specials) which include labor, mounting, stretching and fitting can be customized for your store. You can create and edit a service (special) at any time. Each Service (Special) includes the Labor and Material Cost, Markup and Costing Method for Standard and Oversize.

1. Touch/Click on the **Services (Specials)** button on the Home screen.

Note: *The screen will display a list of pre-programmed services (specials). The labor and material cost, markup and costing method for each preprogrammed service (special) will need to be edited or have a value entered for both Standard and Oversize. Do not use the current default markups/costs. You can deactivate the services (specials) that your store will not be using by clicking on the Deactivate button adjacent to the service (special).*

The screenshot shows the 'Services Search' interface. At the top, there is a search bar labeled 'Search...' and three buttons: 'Create Service', 'Create Service Type', and 'Fitting'. Below these is a checkbox labeled 'Show Deactivated Services'. The main area displays a list of services, each with a name, a category, and two buttons: 'Details' and 'Deactivate'.

Service Name	Category	Details	Deactivate
3xBoard	Mounting	Details	Deactivate
AjFw/Art	Mounting	Details	Deactivate
AcidFree	Mounting	Details	Deactivate
BlackFC	Mounting	Details	Deactivate
CanvasXf	Mounting	Details	Deactivate
Crdboard	Mounting	Details	Deactivate
DMBlackM	Mounting	Details	Deactivate
DrymtFC	Mounting	Details	Deactivate
DrymtXB	Mounting	Details	Deactivate

Services Screen

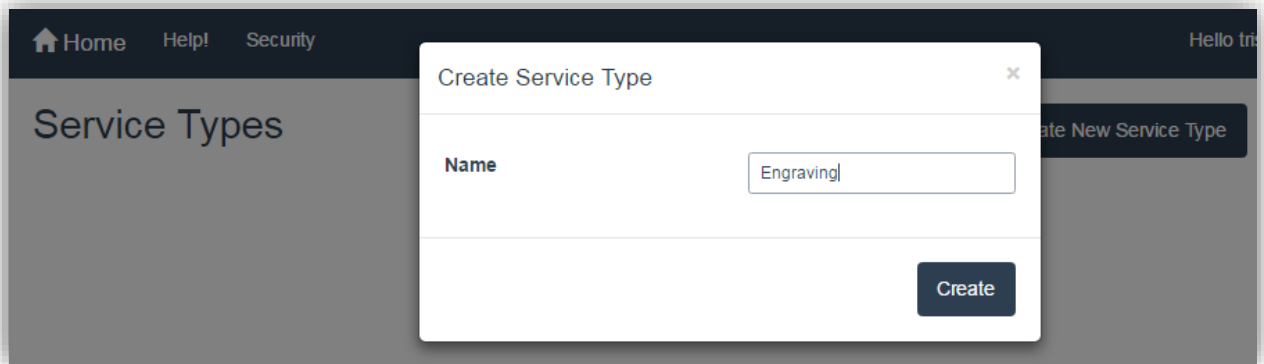
Search

1. Type **Services-Special's Name** or Type into the Search field to find.
2. List will appear that contains your search word(s).
3. Can also Touch/Click & Drag **Slider Bar** to the right of list to view entire page.

Create Service Type

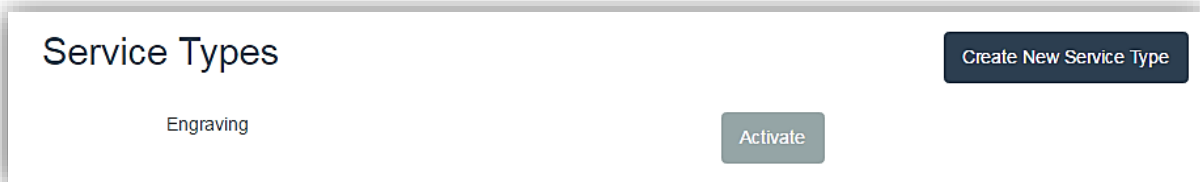
Current default Service types/categories are Mounting, Stretching & Special (Labor).

1. Touch/Click the **Create Service Type** button on the Services home menu.
2. Touch/Click the **Create New Service Type** button.
3. In the Service Type pop-up window, **Type the Name of the Service** category into the field.
Demo Example: Engraving
4. Touch/Click the **Create** button.



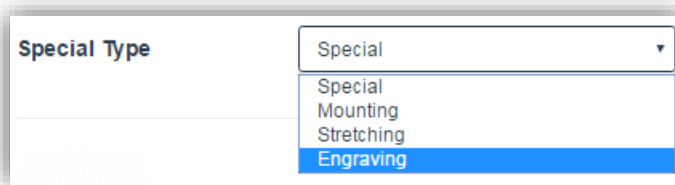
Create Service Type

5. Touch/Click the **Activate** button.



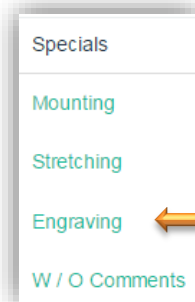
Activate New Service Type

6. The new service type will be available for selection when creating a new service/special.



Special Type Drop Down List

7. The new service type (Engraving) will also be available for selection under the Specials category on the Workorder screen.



Create New Service

Demo Example: Add Specials (Engraving Details/Costs) to the Service Type: Engraving

1. Touch/Click on the **Create Service** button to add your own special.
2. Touch/Click into each applicable **Specials Detail** field to **Add Value**.
 - a. Touch/Click Name field. Type **Engraving**.
 - b. Touch/Click Description field: **Type Fee per Letter-Number-Symbol**
 - c. Touch/Click **Engraving** in the Special Type drop down menu.
 - d. Touch/Click Min. Amount of Labor. Type preferred **Amount**.
 - e. Touch/Click Min Amount of Material: Type preferred **Amount**.
 - f. Type **Reminder Message**: Optional.
 - g. Use UI Grid Pricing: Optional
 - h. Auto Check on New Workorders? Select if you would like the engraving to display on the workorder.
 - i. Show on Picklist? Select if you would like the engraving to display on the picklist.
 - j. Touch/Click Unit of Measure drop down arrow. Touch/Click **Inch**.
 - k. Touch/Click Height field. Type desired **Height**
 - l. Touch/Click Width field. Type desired **Width**.
 - m. Touch/Click **Labor Cost** field in the **Standard** column. Type desired **Cost**.
 - n. Touch/Click Labor Markup field. Type desired **Markup**
 - o. Touch/Click **Unit** in the **Labor Costing Method** drop down menu.
 - p. Touch/Click Material Cost field. Type **Cost**.
 - q. Touch/Click Material Markup field. Type **Markup**.
 - r. If you would like to charge for Oversize. Complete the fields in the Oversize column.
 - s. Touch/Click **Save and Exit** button.

Special Details

Name	Engraving	Reminder Message	
Description	Fee per letter/number/symbol		
Special Type	Engraving	Unit of Measure	Inch
Min Amount Labor	0	Use UI grid pricing?	<input type="checkbox"/>
Min Amount Material	0	Auto check on new Work Orders?	<input checked="" type="checkbox"/>
		Show on Pick List?	<input checked="" type="checkbox"/>

Standard		Oversize	
Height	60	Labor Cost	0
Width	60	Labor Markup	0
Labor Cost	0	Labor Costing Method	Unit
Labor Markup	1	Material Cost	0
Labor Costing Method	Unit	Material Markup	0
Material Cost	0	Material Costing Method	Unit
Material Markup	2		
Material Costing Method	Unit		

Save And Exit

Create Services/Specials Details

Note: Image below displays Engraving Services (Specials) selections on the Workorder screen. Quantity of 5 was selected for # Word/Symbol to represent fee to engrave 5 words.

<div>Specials</div> <div>Mounting</div> <div>Stretching</div> <div>Engraving</div> <div>W / O Comments</div>	<input checked="" type="checkbox"/> # Word/Symbol <input type="text" value="5"/> <input type="checkbox"/> Full Date <input type="checkbox"/> Monogram - 3 initial
--	---

Workorder Specials: Engraving

Fitting Fee

Create an additional Fitting Fee per measurement or unit to be added to workorders.

1. Touch/Click the **Fitting** button on the Services home screen.
2. Touch/Click the **Unit of Measure** in the drop-down list located top right screen.
3. **Complete** all fields.
4. Touch/Click the **Save** button.

The screenshot shows a mobile application interface for creating a fitting fee. The form is titled "Fitting" and is divided into two main sections: "Standard" and "Oversize". At the top right, there is a "Unit of Measure" dropdown menu currently set to "Inch". The "Standard" section contains five input fields: "Height" (32), "Width" (40), "Labor Cost" (0.31), "Labor Markup" (1), and "Labor Costing Method" (United Inch). The "Oversize" section contains three input fields: "Labor Cost" (0.50), "Labor Markup" (1), and "Labor Costing Method" (United Inch). A "Save" button is located at the bottom right of the form.

Fitting		Unit of Measure	
		Inch	
<hr/>			
Standard		Oversize	
Height	32	Labor Cost	0.50
Width	40	Labor Markup	1
Labor Cost	0.31	Labor Costing Method	United Inch
Labor Markup	1		
Labor Costing Method	United Inch		
		Save	

Create Fitting Fee

1. Touch/Click on the **Details** button on the Service/Specials line item that you would like to edit.
2. Touch/Click into the **field** that you would like to change, backspace current data to delete and **type new value**.
3. Touch/Click **field drop down arrows** to **select a different type**.
4. Touch/Click on **Save** when complete.

Special Details

Name	<input type="text" value="1 HrLbr"/>	Reminder Message	<input type="text"/>
Description	<input type="text"/>		
Special Type	<input type="text" value="Special"/>	Unit of Measure	<input type="text" value="Inch"/>
Min Amount Labor	<input type="text" value="0"/>	Use UI grid pricing?	<input type="checkbox"/>
Min Amount Material	<input type="text" value="0"/>	Auto check on new Work Orders?	<input type="checkbox"/>


Standard		Oversize	
Height	<input type="text" value="32"/>	Labor Cost	<input type="text" value="35"/>
Width	<input type="text" value="40"/>	Labor Markup	<input type="text" value="1"/>
Labor Cost	<input type="text" value="35"/>	Labor Costing Method	<input type="text" value="Unit"/>
Labor Markup	<input type="text" value="1"/>	Material Cost	<input type="text" value="0"/>
Labor Costing Method	<input type="text" value="Unit"/>	Material Markup	<input type="text" value="1"/>
Material Cost	<input type="text" value="0"/>	Material Costing Method	<input type="text" value="Unit"/>
Material Markup	<input type="text" value="1"/>		
Material Costing Method	<input type="text" value="Unit"/>		

Service/Special Details

Auto Select Special/Service on Work Order Screen

1. Touch/Click **Services (Specials)** button on the main menu.
2. **Search** for the Service/Special that you would like to auto select on the write order screen. **Demo Example:** *Acid Free Mounting*.
3. Touch/Click the Details button on desired Service/Special.
4. Touch/Click “Auto Check on New Workorders?” field to select.

Special Details

Name	AcidFree	Reminder Message	
Description			
Special Type	Mounting ▼	Unit of Measure	Inch ▼
Min Amount Labor	0	Use U1 grid pricing?	<input type="checkbox"/>
Min Amount Material	0	Auto check on new Work Orders?	<input checked="" type="checkbox"/> 

Standard

Height	32
Width	40
Labor Cost	0.43
Labor Markup	1
Labor Costing Method	United Inch ▼
Material Cost	0
Material Markup	1
Material Costing Method	United Inch ▼

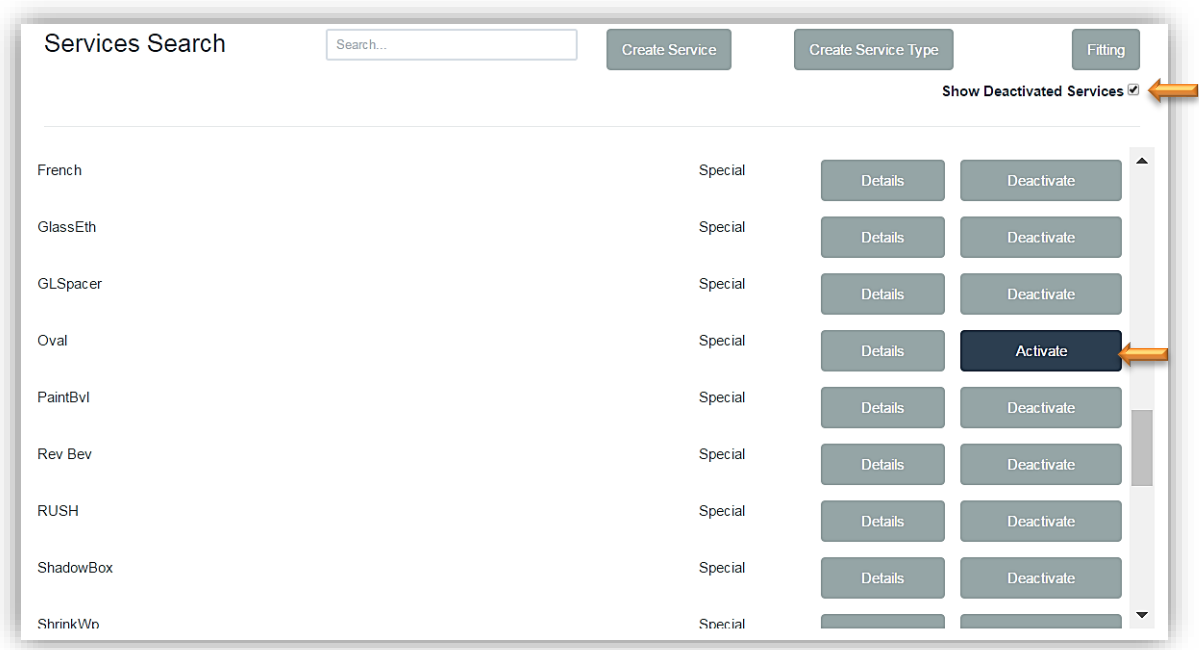
Oversize

Labor Cost	0.43
Labor Markup	1
Labor Costing Method	United Inch ▼
Material Cost	0
Material Markup	1
Material Costing Method	United Inch ▼

Service (Special) Details - Auto Select

Deactivate -- Show Deactivated - Activate Services/Specials

- 1. To remove a Service/Special from the list on the both the Services/Specials Menu and Write Order screen. Touch/Click the **Deactivate** button on the appropriate line item.
- 2. To **Activate** a Service/Special that has been previously de-activated. Touch/Click the **Show Deactivated Services** box located top right screen below Fitting button. Touch/Click the **Blue Activate** button on the appropriate line item. The Service/Special will now appear both in the Service/Specials menu and on the Write Order screen.



Deactivate – Activate – Show Deactivated Services

Art Conditions

Create New, Activate or Deactivate Art Condition categories that are used to document the type of physical condition the art is in when you receive it to frame. Ex: Cracks, Flaking, Crease, Good etc.

1. Touch/Click on the **Art Conditions** button.

Create New

1. Touch/Click on the **Create** button.
2. Touch/Click the **Name** field and type Art Condition Name.
3. Touch/Click in **Description** field and type the Art Condition Description.
4. Touch/Click on **Create New**.

Deactivate – Activate – Show Deactivated

1. The screen will display a pre-programmed **Art Conditions** list.
2. Touch/Click the **Deactivate** button on the Art Condition line item that you would like to remove from displaying on both the Art Condition menu and list in the workorder.
3. To Activate Art Conditions that were previously deactivated. Touch/Click the **Show Deactivated Art Conditions** box located upper right screen.
4. Touch/Click the blue **Activate** button on the Art Condition line to re-activate.

Art Conditions

Create New

Show Deactivated Art Conditions

Name	Description	
Abrasions	Loss of media caused by rubbing or scraping.	Deactivate
Accretions	An accumulation of extraneous matter on the surface of the painting that alters the original design, i.e. dirt, dust, grime, etc.	Activate
Aging Cracks	Visible stress as a result of adverse environment conditions, mechanical or other causes that have developed over an extended period of time. The cracks are through all the layers of a painting beginning with the support. The individual cracks or fissures can form a network pattern of straight or barely curved lines.	Deactivate
Alligatoring	The upper paint layers pull away in a pattern similar to the look of an alligator's hide when the drying process is compromised. The layer below is visible and the upper layer has a raised appearance.	Deactivate
Auxiliary Spline	An attachment contributing stability and/or strength.	Activate

Art Conditions

Art Types

Create New, Activate and Deactivate categories used to note the type of art you are framing in the workorder. Ex: Pastel, Watercolor, Pen and Ink, etc.

Create New

1. Touch/Click **Create** New button.
2. Type the Type of **Art Name** into the name field.
3. Type **Description** of the Art Type in the description field.
4. Touch/Click on **Create** button.

Deactivate – Activate – Show Deactivated

1. The screen will display a pre-programmed **Art Types** list.
2. Touch/Click the **Deactivate** button on the Art Type line item that you would like to remove from displaying on both the Art Type menu and list in the workorder.
3. To Activate Art Types that were previously deactivated. Touch/Click the **Show Deactivated Art Types** box located upper right screen.
4. Touch/Click the blue **Activate** button on the Art Condition line to re-activate.

Name	Description
Chalk	Deactivate
Charcoal	Deactivate
Conte	Activate
Crayon	Deactivate
Graphite	Deactivate
Finger	Deactivate
Marker	Deactivate
Pastel	Deactivate
Pen and Ink	Deactivate
Pencil	Deactivate

Art Types

Inventory – Art and Gallery Items

Add art, ready made frames, gifts, misc. products or supplies to your stores inventory to sell in the program. Track consignments, artist commissions, product inventory level etc.

1. Touch/Click on the **Inventory** button on the Home screen.

Create New

Demo Example: Art Print

1. Touch/Click on **Create New** button.
2. Touch/Click **Inventory Type** drop down arrow. Touch/Click **Art Item**. Available Types are **Supply, Finished Product, Art Item**.

Note: It is necessary to select the inventory type since the data needed for each category differs.

3. Touch/Click each **Applicable Field** and type **Corresponding Value**.
 - Art Type required fields are Title, Description, Item #, Artist First/Last Name and Company Phone.
 - Finished Product and Supply Type required fields are Title, Description and Item #.
4. If you would like to Add an **Additional Inventory Item**. Touch/Click the **Create Another?** field box. *If not, move to Step 5.* Touch/Click the **Update/Create** button to **Save** the current inventory item entry. You will stay on the Add/Edit Inventory screen, so you are able to add the next inventory item. If the new item does not fall under the Art Inventory Type (Default), select new inventory type from the drop down list. *Refer to step 2.*
5. Touch/Click **Save**.

Note: Create your own item codes or use Vendor's Item, Sku and UPC numbers if available.

6. See the next page for the Add Inventory screen images for each Inventory Type: Art, Finished Product, Supply and Ready Made.

Add / Edit Inventory

Inventory Type: Art Item

Title	The Italian Villa	Item Number	A1234
Bin	1	Active	<input checked="" type="checkbox"/>
SKU	A1234	Quantity On Hand	150
UPC		Inventory Threshold	140
Entered	5/9/2019	Art Type:	Paint - Oil
Description	The Italian Villa - Print - 20x18	Pre-Framed?	<input type="checkbox"/>

Cost	175.0000	Markup	2.0000
Tax Exempt?	<input type="checkbox"/>	Retail	350.00

Consignor	Art Guye	Commission	75.00
Supplier		Supplier Number	
Class		Department	

Image Height	20	Image Width	18
Paper Height	0	Paper Width	0
Measurement Type:	Inch		

Artist	Art Guy	Edition Number	0
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Create Another? ☐
Save
Cancel

Add Inventory Item - Art

Add / Edit Inventory

Inventory Type: Finished Product

Title	Vanilla Candle	Item Number	D1234
Bin		Active	<input checked="" type="checkbox"/>
SKU	D1234	Quantity On Hand	21.0000
UPC		Inventory Threshold	0.0000
Entered	5/9/2019	Unit of Measure	Each
Description	Vanilla Scented - Color : Cream - Pillar Size 3x6	Type:	

Cost	10.0000	Markup	3.0000
Tax Exempt?	<input type="checkbox"/>	Retail	30.00

Supplier		Supplier Number	
Class		Department	

Inside Height	0.0000	Inside Width	0.0000
Outside Height	3.0000	Outside Width	6.0000
Measurement Type:	Inch		

Create Another? ☐
Save
Cancel

Add Inventory – Finished Product

Add / Edit Inventory

Inventory Type: Supply

Title	Hanger	Item Number	E1234
Bin		Active	<input checked="" type="checkbox"/>
SKU	E1234	Quantity On Hand	50.0000
UPC		Inventory Threshold	10.0000
Entered	10/19/2017	Unit of Measure Type:	Each
Description	Color: Silver		
Cost	5.0000	Markup	2.0000
Tax Exempt?	<input type="checkbox"/>	Retail	10.00
Supplier	Hangers R Us	Supplier Number	5987

Create Another? ☐

Save

Cancel

Add Inventory - Supply

Manage Inventory Levels

Configure the program to Decrement inventory item quantities and alert when quantity falls below set quantity threshold. If an inventory item is Returned/Voided it will be added back to the inventory.

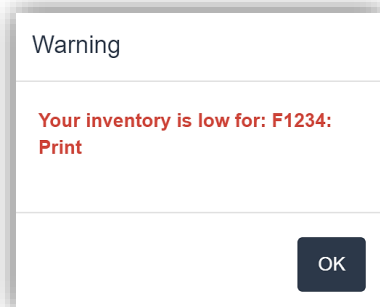
Decrement Inventory:

1. Touch/Click **Store Configuration** on the main menu.
2. Touch/Click **Settings** tab.
3. Touch/Click **Decrement Inventory?** field to **Select**.
4. Touch/Click **Save**.
5. Enter **Current On-Hand** quantity in the item's inventory record.
6. The program will now remove quantity sold.

Warn When Inventory Falls Below Set Threshold

1. Touch/Click **Store Configuration** on the main menu.
2. Touch/Click **Settings** tab.
3. Touch/Click **Warn When Inventory Falls Below Threshold?** field to **Select**.
4. Touch/Click **Save**.
5. Enter **Threshold** quantity in the item's inventory record.

6. When the inventory falls at or below the inventory threshold when the item is added to the invoice, the following warning pop up window will appear on the screen. Touch/Click **Ok** to exit window.



Search - Edit – Deactivate – Activate Inventory Item

Search/Find or Activate/Deactivate a product in your store inventory list. Edit/Change or Add information to a product's record.

Search

1. Touch/Click on **Search** Field: Type inventory item Name, Title, Description, SKU, UPC or Bin number into the Search field and Touch/Click **Search**. Items will list that match the Search word(s) .

Edit

Change/ Add information in the current inventory item record or edit inventory quantity on the inventory main menu.


Edit Item Inventory Record

1. Touch/Click Edit on the inventory line item to open the Add/Edit screen.
2. Touch/Click field(s) to **Add or Edit** data.
3. Touch/Click the **Save** button to save changes.

Edit Quantity on Inventory Main Menu.

1. Touch/Click into the corresponding line item's **Quantity** field. Remove/Backspace current quantity. Type new quantity.

The screenshot shows the 'Inventory' management screen. At the top, there is a search bar and a 'Create New' button. Below this is a table with the following columns: Number, Title, Description, Quantity, Retail, and a set of action buttons (Edit, Deactivate, Upload). An example row is displayed with the following data: Number 'A1234', Title 'The Italian Villa', Description 'The Italian Villa - Print - 20x18', Quantity '200', and Retail '\$350.00'. There is also a small image of a villa. Below the Quantity field and the Edit button, there are orange arrows pointing upwards, indicating where to click to edit the quantity.

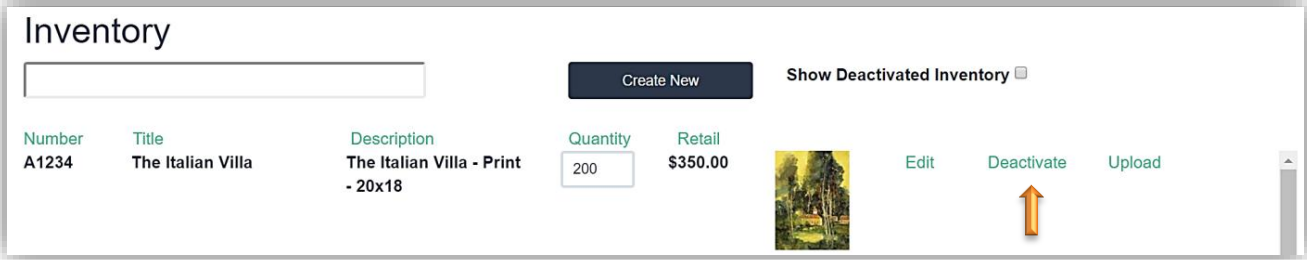
Number	Title	Description	Quantity	Retail			
A1234	The Italian Villa	The Italian Villa - Print - 20x18	200	\$350.00		Edit	Deactivate Upload

Inventory - Edit Record/Quantity

Deactivate

Remove item from your store inventory.

1. Touch/Click **Deactivate** on the Inventory Item line item that you would like to remove. The inventory item will be removed from the Active Inventory List.



Inventory Menu – Deactivate Item

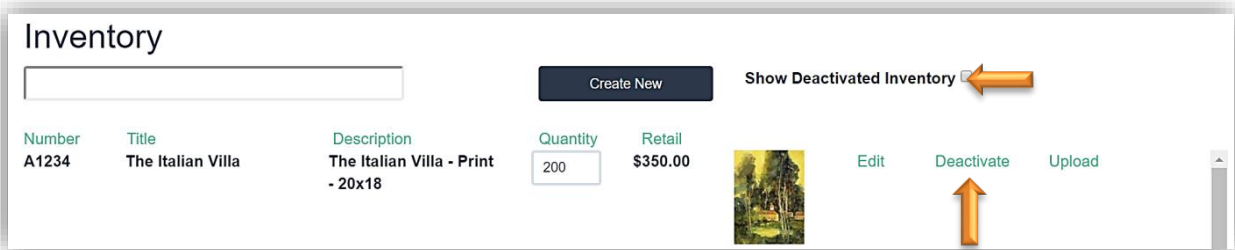
Activate

Add a previously deactivated item back into your store inventory.

1. Touch/Click the **Show Deactivated Inventory** field located top right screen to select. All items that have been previously deactivated will display.

Show Deactivated Inventory ☒

2. Touch/Click **Activate** on the line item that you would like to return to your store inventory.



Inventory Menu – Activate Item

Upload Inventory Art Image

Upload the Art Inventory Image which will display on the main inventory screen on the corresponding line item.

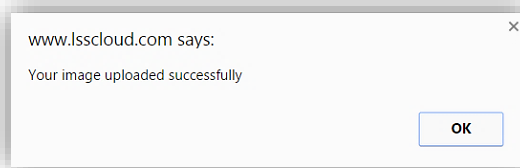
1. On the main Inventory Menu screen. Touch/Click on the **Upload Image** option on the art line item that you would like to upload the image.

Note: The Upload Image option only applies to inventory items that are programed under the type: Art Item.

2. The Pictures/Photo Library window will open on your computer/tablet. Touch/Click the desired image/photo/jpeg. It will be necessary to Click the Open button in the window on a desktop.

Note: Process can differ depending on the device and browser type.


3. LSS Cloud Message window displays. Your image uploaded successfully. Touch/Click the **OK** button.








4. Image/Photo will display on the corresponding art inventory line item.

Inventory

Create New

Show Deactivated Inventory 

Number	Title	Description	Quantity	Retail				
A1234	The Italian Villa	The Italian Villa - Print - 20x18	<div>200</div>	\$350.00		Edit	Deactivate	Upload
F1234	The Winding Creek	Print	<div>3</div>	\$225.00		Edit	Deactivate	Upload
G1234	Old Aqua Door	Print	<div>0</div>	\$125.00		Edit	Deactivate	Upload
H1234	The Creek	The Creek 16x20 Art Print	<div>25</div>	\$250.00		Edit	Deactivate	Upload
J1234	Boy with Red Wagon	Photo	<div>0</div>	\$50.00		Edit	Deactivate	Upload
B1234	Ready Made Frame 8x10	Aqua Blue Ready Made Frame 8x10	<div>150</div>	\$25.00		Edit	Deactivate	
D1234	Vanilla Candle	Vanilla Scented - Color : Cream - Pillare Size 3x6	<div>0</div>	\$30.00		Edit	Deactivate	
k1234	Black Frame 5x7	Black Frame 5x7	<div>0</div>	\$15.00		Edit	Deactivate	
C1234	Dav at the Beach	Water Color	<div>50</div>	\$200.00		Edit	Deactivate	

Page: 1

Inventory Main Menu Screen

You have now completed Getting Started!!! It is now time to Write Orders!!!