



LSS Cloud User 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.*

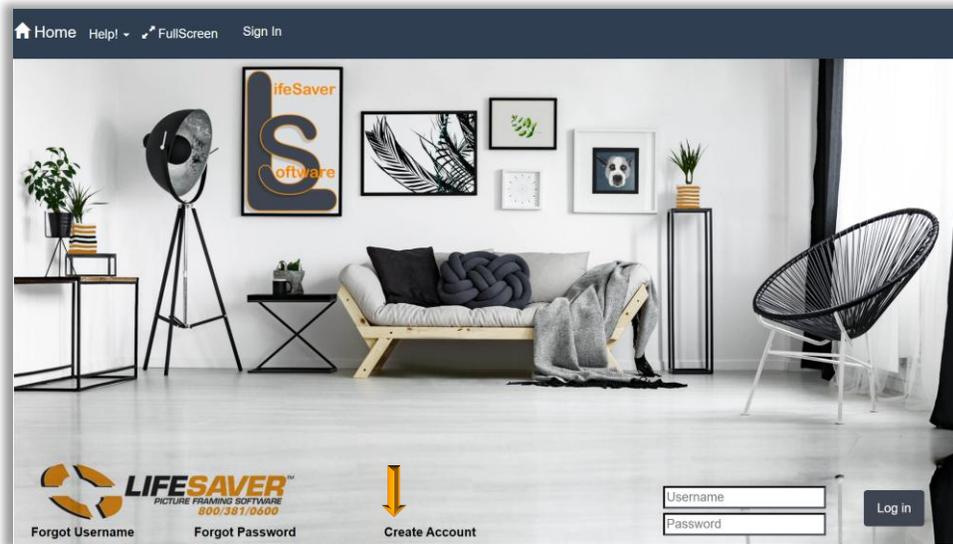
- **Internet Browsers:** Safari & Chrome

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.lsscloud.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	Contact Information
Store Name <input type="text" value="LifeSaver Training Gallery"/>	FirstName <input type="text" value="Tristan"/>
Street <input type="text" value="1234 LifeSaver Circle"/>	LastName <input type="text" value="Trainee"/>
Street Continued <input type="text"/>	UserName <input type="text" value="tristantrainee"/>
City <input type="text" value="Canton"/>	Email <input type="text" value="tt@gmail.com"/>
Country <input type="text" value="UNITED STATES"/>	Password <input type="password" value="*****"/>
State <input type="text" value="GA"/>	Confirm password <input type="password" value="*****"/>
Zip <input type="text" value="30114"/>	Measurement Unit <input type="text" value="Inch"/>
Phone <input type="text" value="404-123-4567"/>	Agree to the Terms of Use? <input checked="" type="checkbox"/> (Terms of Use)
Fax <input type="text"/>	<input type="button" value="Register"/>
Email <input type="text" value="LSTG@gmail.com"/>	

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

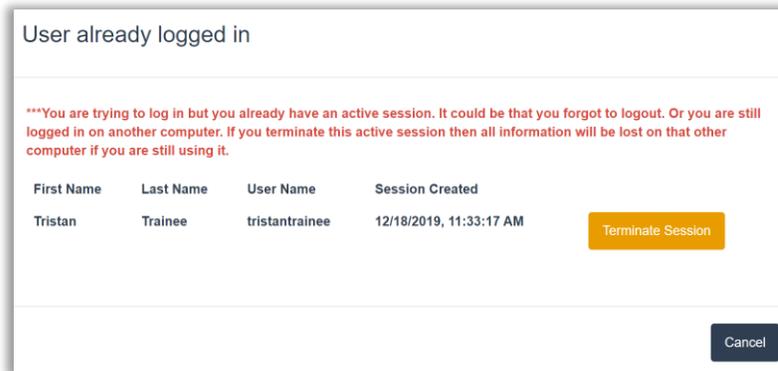
Log Off

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



User Already Logged In

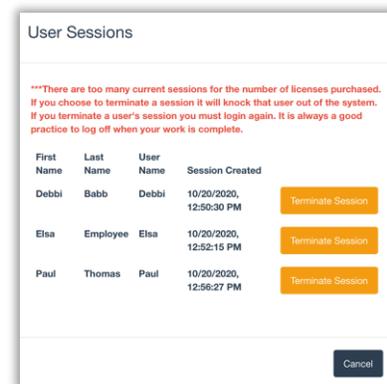
If you did not log out of your previous session and you login in again, you will receive the following pop-up window.



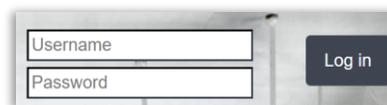
1. Touch/Click the **Terminate Session** button.
2. You will return to the Home screen. Type **Password**. Touch/Click **Log In** button.

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.



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



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**.



LifeSaver Cloud Home Screen Menu Option Descriptions

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

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

Day	Start	End	Period	To	Start	End	Period	Units
Sunday	12	0	AM	To:	6	0	PM	0
Monday	10	0	AM	To:	6	0	PM	15
Tuesday	10	0	AM	To:	6	0	PM	15
Wednesday	10	0	AM	To:	6	0	PM	15
Thursday	10	0	AM	To:	6	0	PM	15
Friday	10	0	AM	To:	6	0	PM	15
Saturday	10	0	AM	To:	17	0	PM	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.

Store Configuration

Workshop Taxes **Credit Card Processor** Settings Store Information Printing Production Camera

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

Save

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.

Store Configuration

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

Merchant Processor: LifeSaver Payments Turn off integrated credit card processing?

LifeSaver Payments

Account Name:

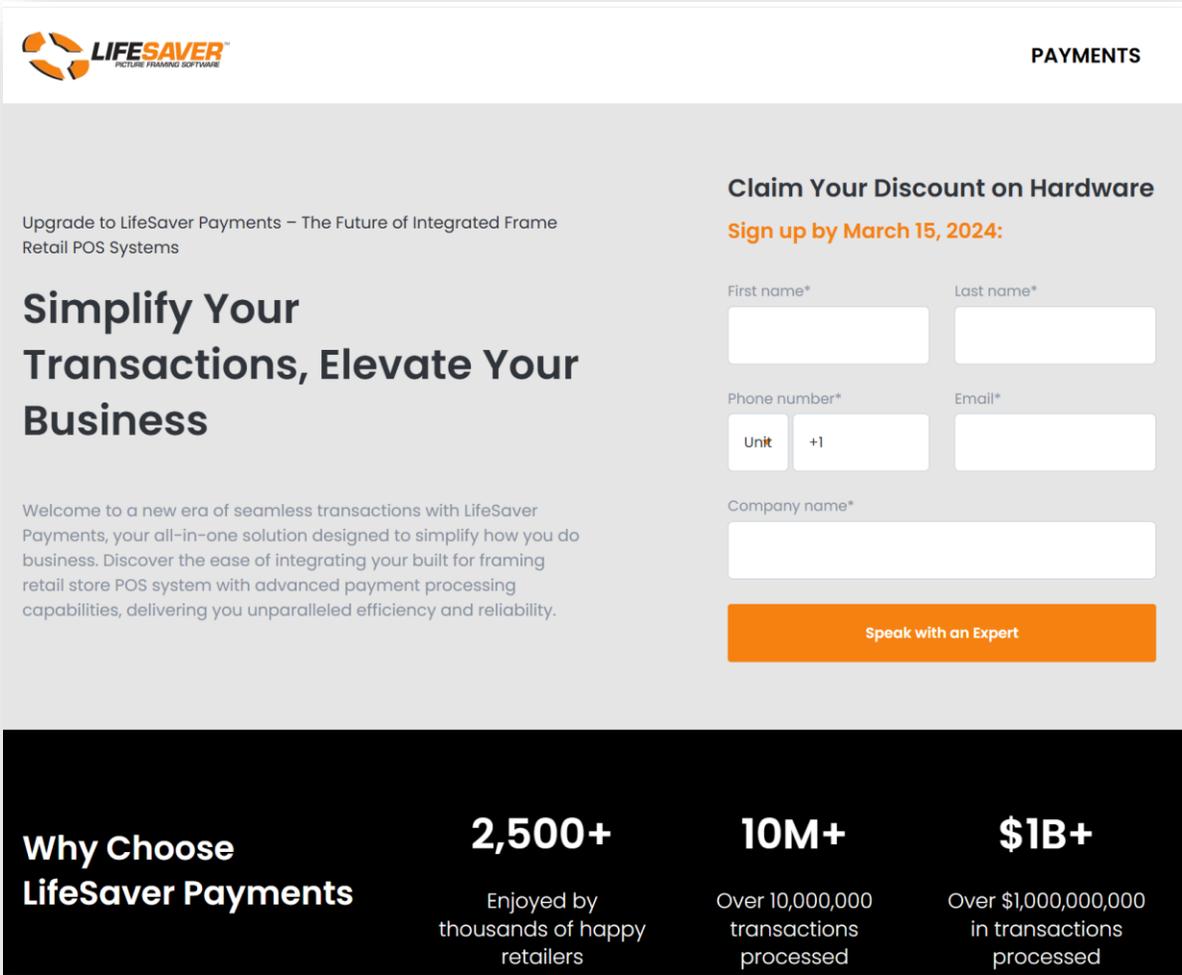
Terminals

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.



LIFESAVER
PICTURE FRAMING SOFTWARE

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

Email*

Company name*

Speak with an Expert

Why Choose LifeSaver Payments

2,500+	10M+	\$1B+
Enjoyed by thousands of happy retailers	Over 10,000,000 transactions processed	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: Currency Type:

Default Work Order Lead Time: Default Mat Costing Method:

Default Moulding UOM: Moulding Waste Per Corner:

Lock Moulding UOM?

- Use Default Fitting Charge?
- Prompt To Check Fillet Width?
- Show Glazing On Layer?
- Show Cost On Write Orders Screen?
- Use LJ Moulding Footage Formula?

Top Border: Bottom Border: Left Border: Right Border:

Reveal 2nd Mat:

Reveal 3rd(+) Mat: Use Add Reveal?

- Require Manager Override?
- Require Customer?
- Require Art Type?
- Require Art Condition?
- Require Promotion?
- External Payment Process? ⓘ
- External Gift Card Payment Process? ⓘ
- Show TruVue™ Glazing Upsell Popup?
- Show Charge Account Payment Option On The Payment Screen?
- Show Frame Club Payment Option On The Payment Screen?
- Show Groupon Payment Option On The Payment Screen?
- Show Write Off Payment Option On The Payment Screen?
- Order Screen - Require Payment Before Delivery?
- Ticket Screen: Width X Height?
- Enable FrameVue™?
- Allow Manual Entry Line Items On An Invoice?
- Require All Work Orders On An Invoice To Be Delivered Together?
- Hide The Discount Option When You Write A Work Order?
- Use New Production Screen?
- Include Inventory Items On Production Screen?
- Inventory Items Not Automatically Marked As Delivered?
- Decrement Inventory?
- Warn When Inventory Falls Below Threshold?

Order Screen - Number Of Days To Start Search From Current Date:

Additional Amount Per Foot:

Additional Amount Per Mounting:

Additional Amount Per Glazing:

Additional Amount Per Mat:

Additional Mat Charge Per Work Order:

Minimum Mat Price Is X Times Cost:

Labor As A percent Of Materials: %

Moulding minimum footage:

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
 No file chosen
* Logo must be 260px wide and 100px tall.

Current Logo



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



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

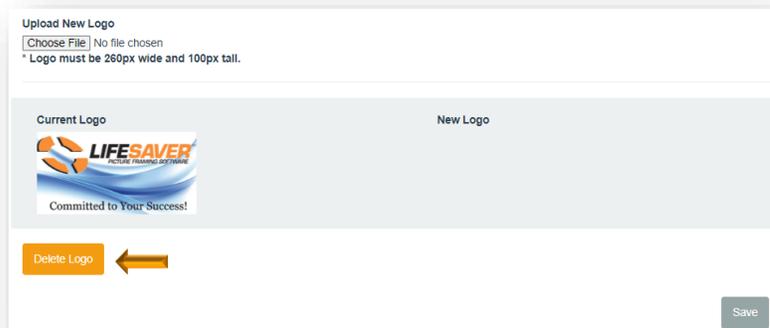
Date	Type	Method	Amount
5/22/2023	Payment	Cash	\$374.50
Total			\$374.50
Balance Due:			\$0.00

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 form contains the following fields:

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

Below the form is a blue button labeled 'Email Template Editor' with a yellow arrow pointing to it. Underneath is the 'Upload New Logo' section with a 'Choose File' button and a note: '* Logo must be 260px wide and 100px tall.' At the bottom, there is a 'Current Logo' section showing the 'LIFESAVER' logo 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 **Name**
Regards, etc. 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 **Name**
Regards, 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:

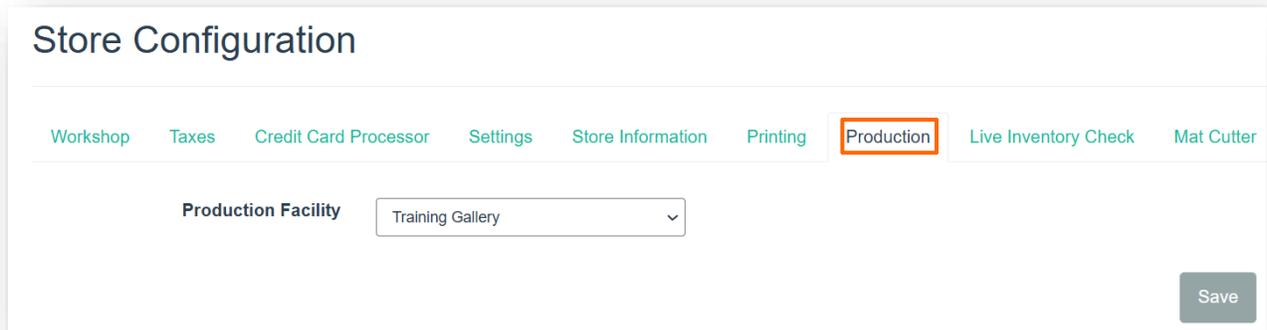
Save

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 interface titled "Store Configuration". At the top, there is a navigation bar with several tabs: "Workshop", "Taxes", "Credit Card Processor", "Settings", "Store Information", "Printing", "Production" (which is highlighted with an orange border), "Live Inventory Check", and "Mat Cutter". Below the navigation bar, the "Production Facility" section is visible, featuring a dropdown menu currently set to "Training Gallery". A "Save" button is located in the bottom right corner of the form area.

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**

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

Omega Moulding

Account Number:

Omega Moulding - Only Allow Orders With The Moulding In Stock In Your Local Warehouse?

Omega Moulding - Validate If Currently In Stock?

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

Larson Juhl Mouldings

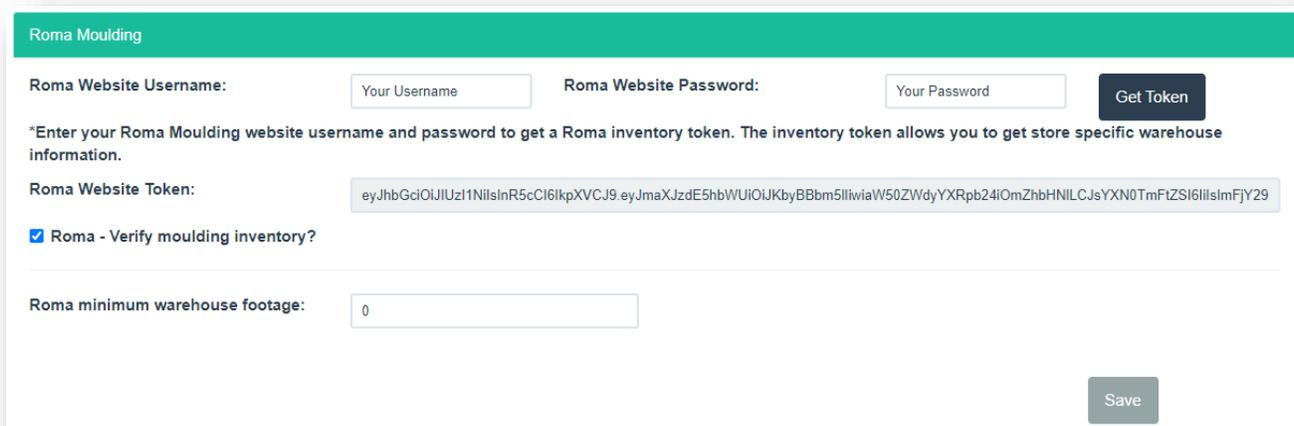
Account Number:

Larson Juhl - Verify moulding inventory?

Larson Juhl minimum warehouse footage:

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 green header. The form contains the following fields and controls:

- 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 grey button.
- Instructions:** A paragraph of text: "*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.eyJmaXJzdE5hbWUOIjkybyBBbm5lliwiaW50ZWdyYXRpb24iOmZhbHNILCJsYXN0TmFtZSI6ImlsImFjY29".
- Verify Inventory:** A checkbox labeled "Roma - Verify moulding inventory?" which is checked.
- Roma minimum warehouse footage:** A text input field with the value "0".
- Save:** A grey button.

Mat Cutter

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

The screenshot shows the 'Store Configuration' interface. At the top, there is a navigation bar with tabs: Workshop, Taxes, Credit Card Processor, Settings, Store Information, Printing, Production, Live Inventory Check, and Mat Cutter (which is highlighted with an orange border). Below the navigation bar, there are two toggle switches: 'Valiani Mat Cutter: ' and 'Wizard Mat Cutter: '. The main content area features a large image of a Valiani mat cutter on the left. To the right of the image, the text reads: 'VALIANI CUTTING MACHINES', 'The gold standard in framing and packaging cutting for over 40 years', and a paragraph of descriptive text. Below the text is a 'VIEW PRODUCTS' link. At the bottom right of the configuration area is a 'Save' button.

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.

The screenshot shows the 'Active Users' page. It features a table with the following columns: UserName, FirstName, LastName, Email, Roles, Delete, and Edit. There are two rows of user data. Below the table, there are two buttons: 'Add User Account' and 'Change Password'.

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

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: Emma

LastName: Employee

UserName: EE2

Email: eemployee@gmail.com

Password:

Confirm password:

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

Set Role Permissions

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:

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 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 type="checkbox"/>	<input checked="" type="checkbox"/>
Vendor Markup	<input checked="" type="checkbox"/>	<input 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.

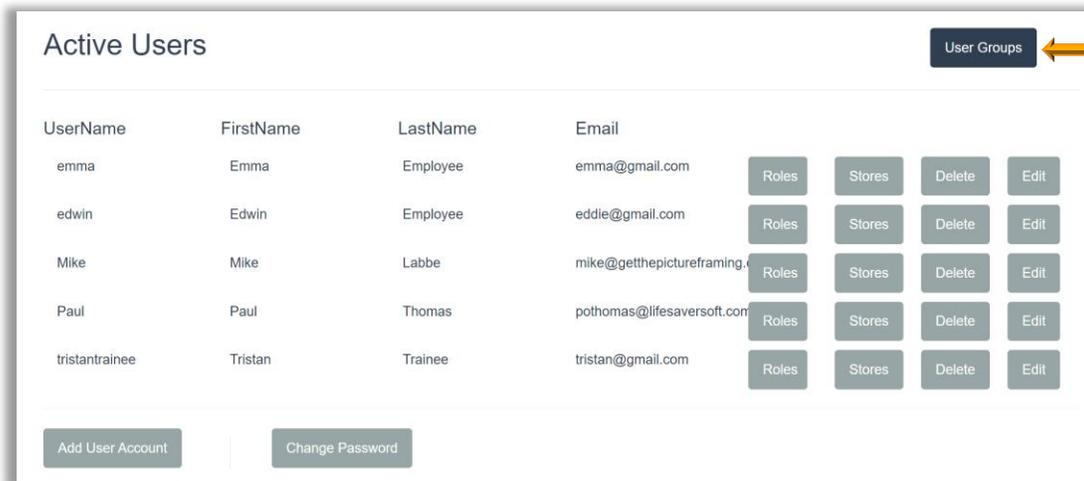
1. Touch/Click the **Stores** button on the corresponding employee line item.
2. Touch/Click **Store Location(s)/Number(s)**. Touch/Click the **Done** button.

User Groups

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

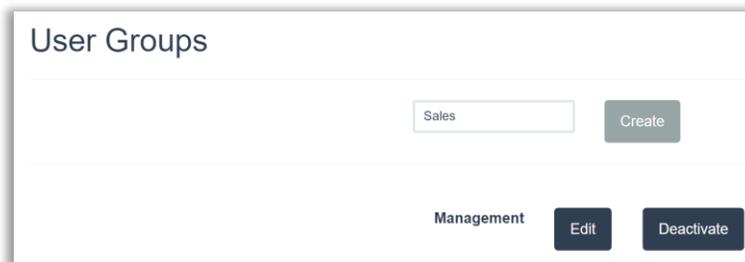
Create

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



Security – Create User Group

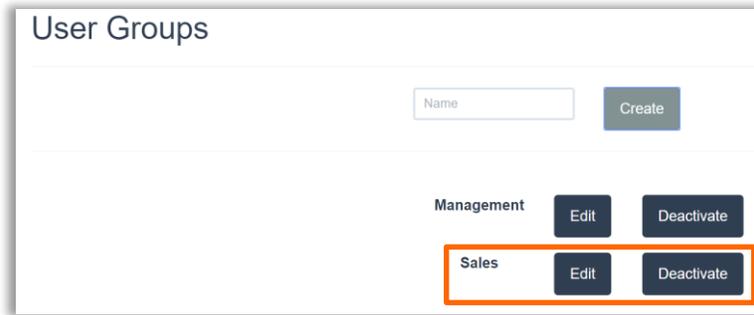
3. Touch/Click into the User Group Name field. **Type Name**. Touch/Click **Create**.



Security – Create User Group

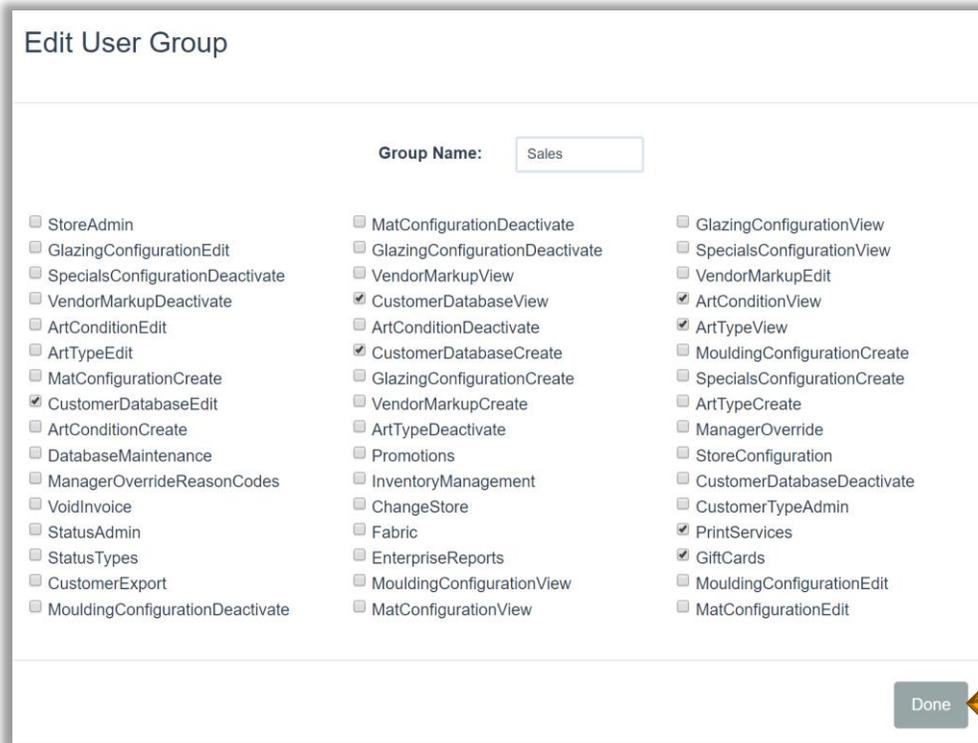
4. The **Sales** Group has now been created.

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



Security – User Group Sales

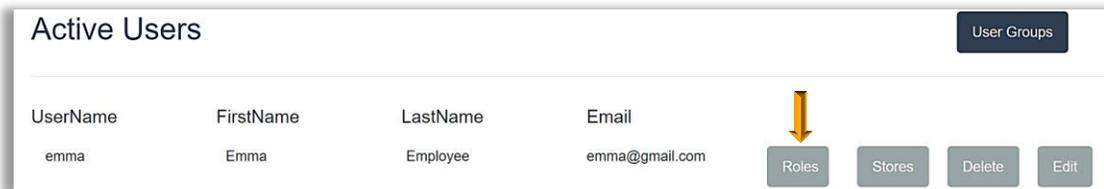
6. Touch/Click the **Field** box to the left of the operations they are allowed to perform. Touch/Click the **Done** button.



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.



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

Apply

Select Role Assignments

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.

The screenshot shows a table titled "Active Users" with columns for Username, FirstName, LastName, and Email. There are three rows of user data. Each row has three buttons: "Roles", "Delete", and "Edit". At the bottom of the screen, there are two buttons: "Add User Account" and "Change Password".

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

Security – Active User

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

The screenshot shows a form titled "Change your password". It has four input fields: "User Name" (with the value "tintrainee"), "Old Password", "Password", and "Confirm password". All password fields are masked with dots. At the bottom, there is a "Change Password" button.

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 data. Type new data. Touch/Click the **Save** button.

The screenshot shows an "Edit" screen for a user profile. It has four input fields: "UserName" (with the value "ee1"), "FirstName" (with the value "Emma"), "LastName" (with the value "Employee"), and "Email" (with the value "eemployee@gmail.com"). At the bottom, there are two buttons: "Back to List" and "Save".

Edit Employee/User Profile

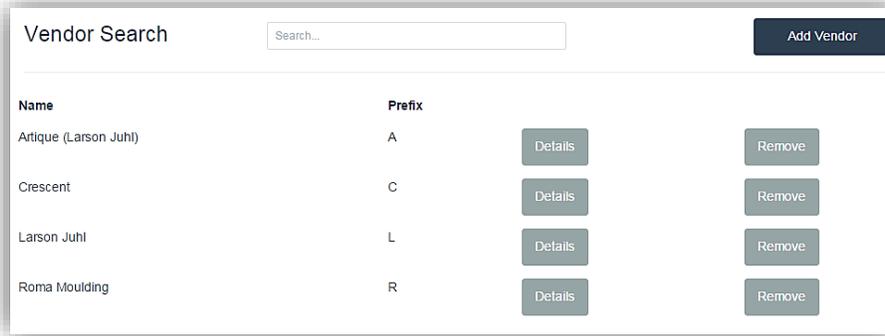
Add/Markup Vendor

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.

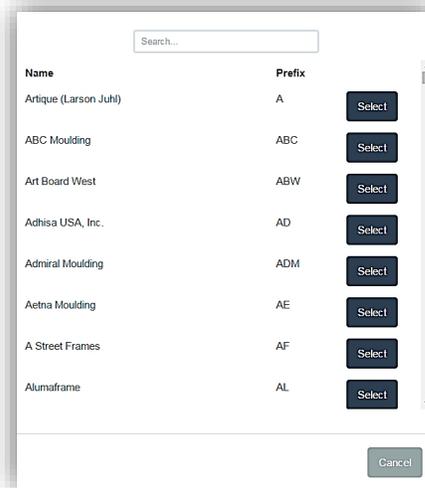
Note: Vendors that are currently in your database are listed on this screen. The program already contains the following vendors: Artique, Larson Juhl, Crescent and Roma.



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.



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	<input type="text" value="Account Number..."/>
Default Moulding Type	<input style="border-bottom: 1px solid black;" type="text" value="Length"/>

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

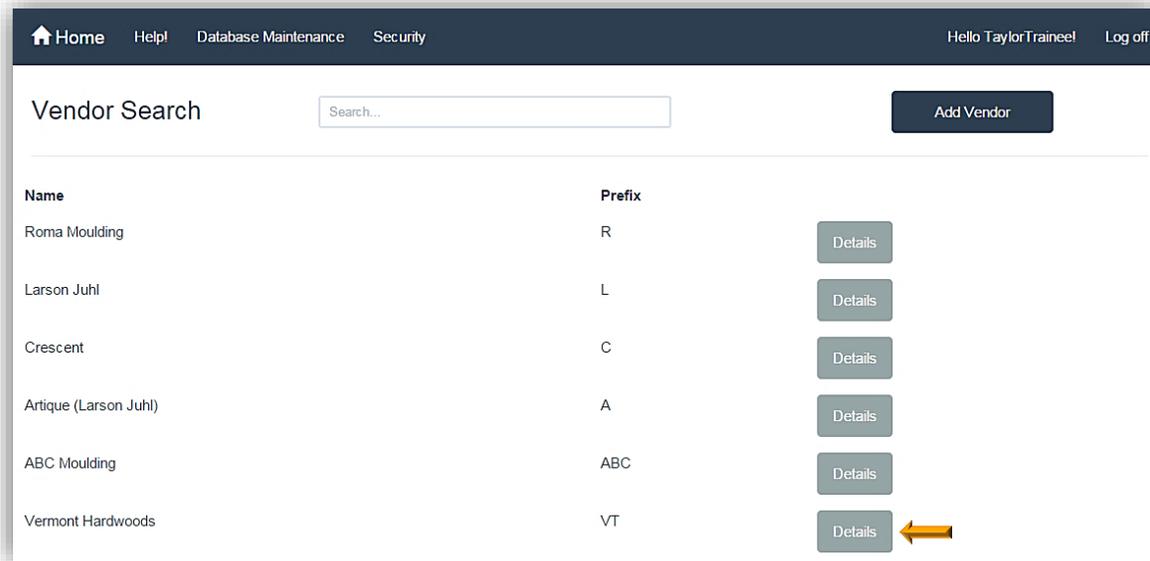
Set moulding markup tables for each vendor or a moulding default markup table across selected vendors that you just added to your database to determine your store's retail cost for each vendor's product line. You will set the markup for each vendor's moulding cut types and the default moulding cut that 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: Chop (selected), Join, Length, Wedge, UI Group

Default UOM: Length

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

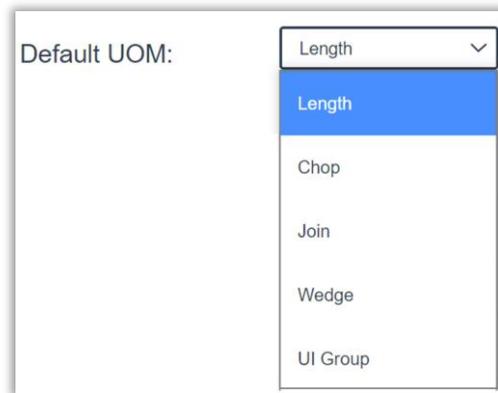
Vendor Details – Default Markup Table

- 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.



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
<input type="text" value="0.0000"/>	<input type="text" value="0.9999"/>	<input type="text" value="0.0000"/>	<input type="text" value="5.40"/>	<input type="text" value=".00"/>
<input type="text" value="1.0000"/>	<input type="text" value="1.4999"/>	<input type="text" value="0.0000"/>	<input type="text" value="4.60"/>	<input type="text" value=".00"/>
<input type="text" value="1.5000"/>	<input type="text" value="1.9999"/>	<input type="text" value="0.0000"/>	<input type="text" value="4.40"/>	<input type="text" value=".00"/>
<input type="text" value="2.0000"/>	<input type="text" value="2.9999"/>	<input type="text" value="0.0000"/>	<input type="text" value="4.30"/>	<input type="text" value=".00"/>
<input type="text" value="3.0000"/>	<input type="text" value="3.9999"/>	<input type="text" value="0.0000"/>	<input type="text" value="4.10"/>	<input type="text" value=".00"/>
<input type="text" value="4.0000"/>	<input type="text" value="4.9999"/>	<input type="text" value="0.0000"/>	<input type="text" value="3.90"/>	<input type="text" value=".00"/>
<input type="text" value="5.0000"/>	<input type="text" value="6.9999"/>	<input type="text" value="0.0000"/>	<input type="text" value="3.60"/>	<input type="text" value=".00"/>
<input type="text" value="7.0000"/>	<input type="text" value="8.9999"/>	<input type="text" value="0.0000"/>	<input type="text" value="3.40"/>	<input type="text" value=".00"/>
<input type="text" value="9.0000"/>	<input type="text" value="9.9999"/>	<input type="text" value="0.0000"/>	<input type="text" value="3.20"/>	<input type="text" value=".00"/>
<input type="text" value="10.0000"/>	<input type="text" value="9999.9999"/>	<input type="text" value="0.0000"/>	<input type="text" value="3.00"/>	<input type="text" value=".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.

Name	Prefix
Default Mat	Select
Default Moulding	Select

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**.

Name	Default Moulding
Account Number	123456
Default Moulding Type	Length

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

Mats: Sheet UI Group Default UOM: Sheet

Apply Default Markup

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

Add Row

Save

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

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.

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

Page: 1 >

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

<table style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20%;">Name</td><td><input type="text" value="R100153"/></td></tr> <tr><td>Description</td><td><input type="text" value="Ramino 2 1/2 Mahogany Lacquer with Gol"/></td></tr> <tr><td>Vendor</td><td><input style="border-bottom: 1px solid #ccc;" type="text" value="Roma Moulding"/></td></tr> <tr><td>Width</td><td><input type="text" value="2.5"/></td></tr> <tr><td>Height</td><td><input type="text" value="0"/></td></tr> <tr><td>UPC</td><td><input type="text" value="0"/></td></tr> <tr><td>Bin</td><td><input type="text"/></td></tr> <tr><td>Moulding Type</td><td><input style="border-bottom: 1px solid #ccc;" type="text" value="Moulding"/></td></tr> <tr><td>Use in Art Cloud</td><td><input type="checkbox"/></td></tr> </table>	Name	<input type="text" value="R100153"/>	Description	<input type="text" value="Ramino 2 1/2 Mahogany Lacquer with Gol"/>	Vendor	<input style="border-bottom: 1px solid #ccc;" type="text" value="Roma Moulding"/>	Width	<input type="text" value="2.5"/>	Height	<input type="text" value="0"/>	UPC	<input type="text" value="0"/>	Bin	<input type="text"/>	Moulding Type	<input style="border-bottom: 1px solid #ccc;" type="text" value="Moulding"/>	Use in Art Cloud	<input type="checkbox"/>	<table style="width: 100%; border-collapse: collapse;"> <tr><td>Chop Cost</td><td>\$</td><td><input type="text" value="19.63"/></td></tr> <tr><td>Join Cost</td><td>\$</td><td><input type="text" value="0.00"/></td></tr> <tr><td>Length Cost</td><td>\$</td><td><input type="text" value="12.60"/></td></tr> <tr><td>Other Cost</td><td>\$</td><td><input type="text" value="0"/></td></tr> <tr><td>Chop Markup</td><td></td><td><input type="text" value="2"/></td></tr> <tr><td>Join Markup</td><td></td><td><input type="text" value="3.09999990463257"/></td></tr> <tr><td>Length Markup</td><td></td><td><input type="text" value="3"/></td></tr> <tr><td>Other Markup</td><td></td><td><input type="text" value="3"/></td></tr> </table>	Chop Cost	\$	<input type="text" value="19.63"/>	Join Cost	\$	<input type="text" value="0.00"/>	Length Cost	\$	<input type="text" value="12.60"/>	Other Cost	\$	<input type="text" value="0"/>	Chop Markup		<input type="text" value="2"/>	Join Markup		<input type="text" value="3.09999990463257"/>	Length Markup		<input type="text" value="3"/>	Other Markup		<input type="text" value="3"/>
Name	<input type="text" value="R100153"/>																																										
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Vendor	<input style="border-bottom: 1px solid #ccc;" type="text" value="Roma Moulding"/>																																										
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Use in Art Cloud	<input type="checkbox"/>																																										
Chop Cost	\$	<input type="text" value="19.63"/>																																									
Join Cost	\$	<input type="text" value="0.00"/>																																									
Length Cost	\$	<input type="text" value="12.60"/>																																									
Other Cost	\$	<input type="text" value="0"/>																																									
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Join Markup		<input type="text" value="3.09999990463257"/>																																									
Length Markup		<input type="text" value="3"/>																																									
Other Markup		<input type="text" value="3"/>																																									

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	720472179788
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

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.

Name	Description	UPC		
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
VToilwax	Oil & Wax #100 Ash	0	Edit	Deactivate
VTWMWHT	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.

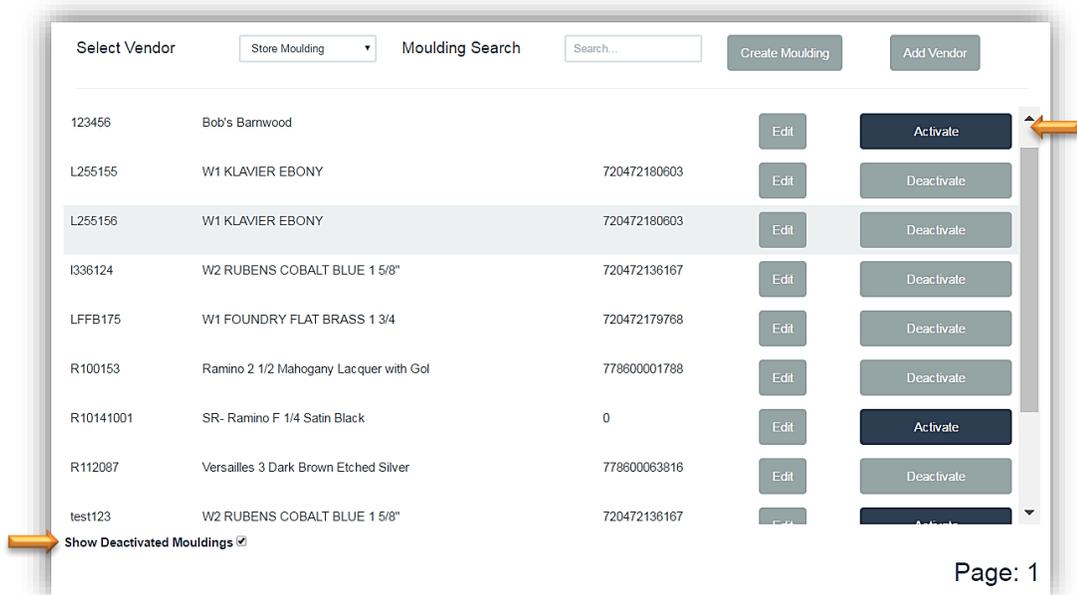
Note: Cannot use in a write order when deactivated.

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 shows the 'Mat Search Screen' interface. At the top, there is a 'Select Vendor' dropdown menu set to 'Crescent', a 'Mat Search' input field containing 'red', and two buttons: 'Create Mat' and 'Add Vendor'. Below this is a table listing mat products with columns for Name, Description, and UPC. Each row has 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-pointing arrow.

Name	Description	UPC	
C1042	Williamsburg Red	93924201707	Details
C1057	Redwood	93924201844	Details
C1559	Redwood	93924105883	Details
C1612	True Red	93924106415	Details
C1673	Really Red	93924133701	Details
C3214	Chinese Red	93924202209	Details
C5510	Red Sky	93924169946	Details
C5527	Deep Red	93924172694	Details

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

The screenshot shows a 'Mat Details' screen with the following fields and values:

Name	C1000	Cost	8.41
Description	Pompano Beach White	Costing Method	Square Inch
Vendor	Crescent	Notes	
Sheet Size	40 X 32		
Bin			
Ply	4		
UPC	93924201219		

At the bottom right, there are two buttons: 'Back' and 'Create Store Mat'.

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

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

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.

Name	Description	UPC
WM5555	Wedding White Signature	

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.

Fabric

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.

The screenshot shows a mobile application interface for fabric search. At the top, there is a 'Select Vendor' dropdown menu with 'Raphaels Master So' selected, a 'Mat Search' input field containing 'douppioni', and an 'Add Vendor' button. Below this is a table of fabric items with columns for Name, Description, and UPC. Each row has a 'Details' button to its right. A vertical scrollbar is visible on the right side of the table.

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	Passionbery 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



The screenshot shows a 'Fabric Details' screen with the following information:

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

A 'Back' button is located in the bottom right corner of the screen.

Fabric Details Screen

Add Fabric Vendor

Refer to instructions in the Vendor Markup section.

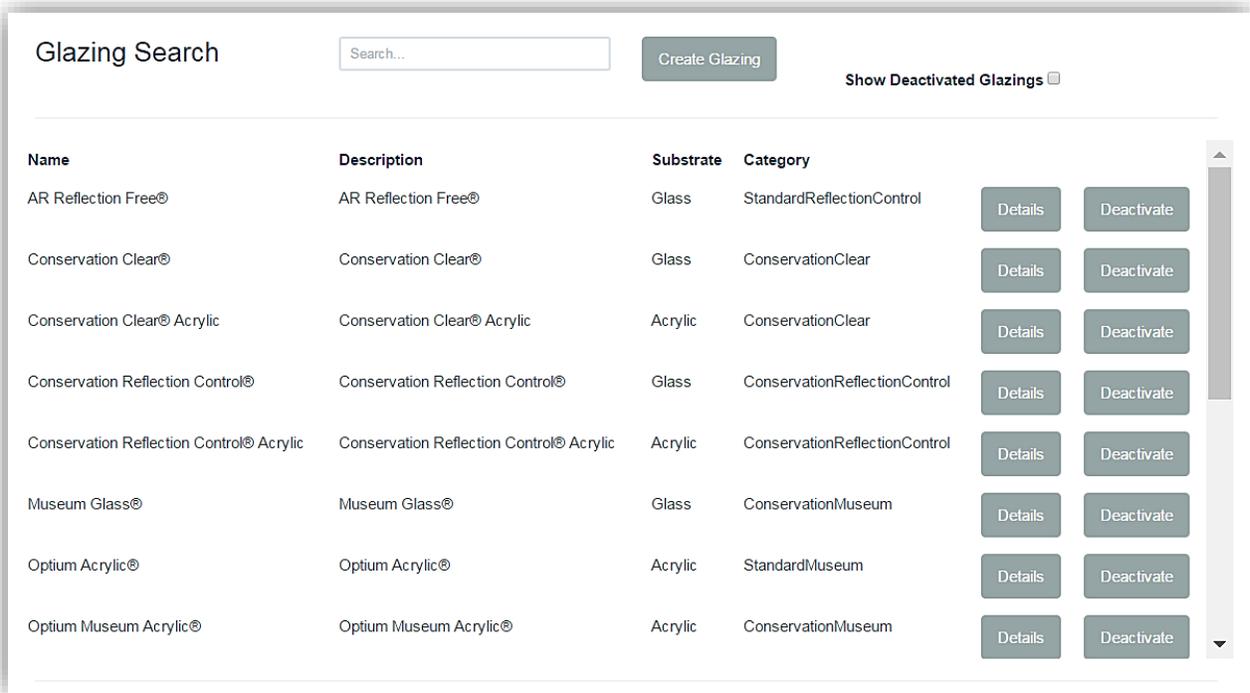
Glazing

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 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.

The screenshot shows the 'Glazing Details' form with the following fields and values:

- Name:** Conservation Clear®
- Description:** Conservation Clear®
- Substrate:** Glass
- Category:** ConservationClear
- Costing Method:** Lite
- Default Costing Method:** Lite
- Min Retail Amount:** 20

A 'Bulk Adjust Pricing' button is located at the bottom right of the form. Orange arrows point to the drop-down arrows of the 'Costing Method' and 'Default Costing Method' fields.

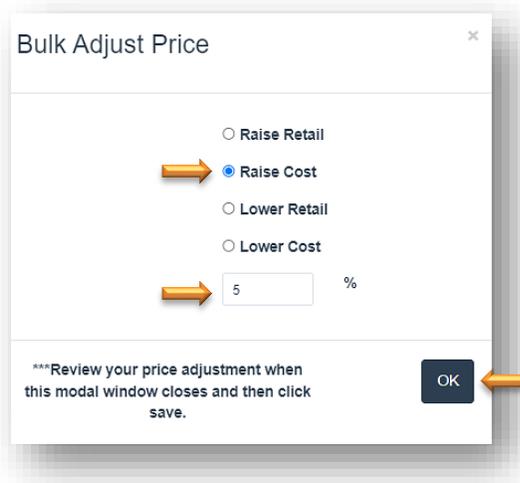
Bulk Adjust Pricing

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**.



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

Glazing Details

Name: Museum Glass® Description: Museum Glass®
Substrate: Glass Category: ConservationMuseum
Costing Method: Lite Default Costing Method: Lite
Min Retail Amount: 0 Bulk Adjust Pricing

Pricing for Lite

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	94.32	2	\$188.64
	22	28	108.28	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	256.68	2	\$519.36
	40	60	433.41	2	\$866.82
	48	68	654.52	2	\$1,129.04

Add Row Save

Before Bulk Glazing Adjustment

Glazing Details

Name: Museum Glass® Description: Museum Glass®
Substrate: Glass Category: ConservationMuseum
Costing Method: Lite Default Costing Method: Lite
Min Retail Amount: 0 Bulk Adjust Pricing

Pricing for Lite

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	111.50	2	\$223.18
	24	30	127.06	2	\$254.12
	24	36	151.94	2	\$303.88
	32	40	210.03	2	\$420.06
	36	48	272.68	2	\$545.32
	40	60	455.08	2	\$910.16
	48	68	692.75	2	\$1,185.50

Add Row Save

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

Substrate

Costing Method

Description

Category

Pricing					
SKU	Height	Width	Cost	Markup	Retail
<input type="text"/>	11	14	\$ 14.02	<input type="text" value="1"/>	\$ \$14.92
<input type="text"/>	14	18	\$ 24.41	<input type="text" value="1"/>	\$ \$24.41
<input type="text"/>	18	24	\$ 28.84	<input type="text" value="1"/>	\$ \$28.84
<input type="text"/>	20	24	\$ 30.09	<input type="text" value="1"/>	\$ \$30.69
<input type="text"/>	22	28	\$ 37.02	<input type="text" value="1"/>	\$ \$37.52
<input type="text"/>	24	30	\$ 40.40	<input type="text" value="1"/>	\$ \$40.49
<input type="text"/>	26	32	\$ 46.73	<input type="text" value="1"/>	\$ \$46.73
<input type="text"/>	24	36	\$ 48.07	<input type="text" value="1"/>	\$ \$48.07
<input type="text"/>	32	40	\$ 62.84	<input type="text" value="1"/>	\$ \$62.84
<input type="text"/>	36	48	\$ 74.5	<input type="text" value="1"/>	\$ \$74.50
<input type="text"/>	40	60	\$ 168.02	<input type="text" value="1"/>	\$ \$168.62
<input type="text"/>	48	96	\$ 229.41	<input type="text" value="1"/>	\$ \$229.41

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	<input type="text" value="Mary's Mirrors"/>	Description	<input type="text" value="House Mirrors"/>
Substrate	<input style="border-bottom: 1px solid #ccc;" type="text" value="Mirror"/>	Category	<input style="border-bottom: 1px solid #ccc;" type="text" value="Mirror"/>
Costing Method	<input style="border-bottom: 1px solid #ccc;" type="text" value="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

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.

The screenshot shows a 'Glazing Search' interface with a search bar, a 'Create Glazing' button, and a 'Show Deactivated Glazings' toggle (checked) with an orange arrow pointing to it. Below is a table of glazing types with 'Details' and 'Activate/Deactivate' buttons. An orange arrow points to the 'Activate' button for 'Optium Acrylic'.

Name	Description	Substrate	Category	Details	Activate/Deactivate
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	Activate
Optium Museum Acrylic®	Optium Museum Acrylic®	Acrylic	ConservationMuseum	Details	Deactivate

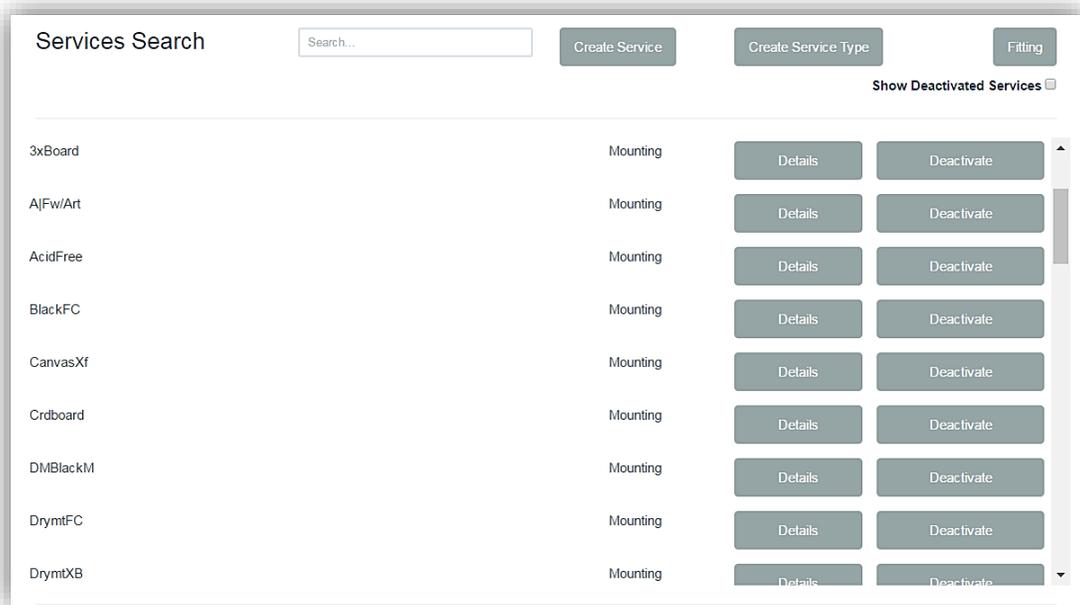
Glazing – Activate/Deactivate

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).



Services Screen

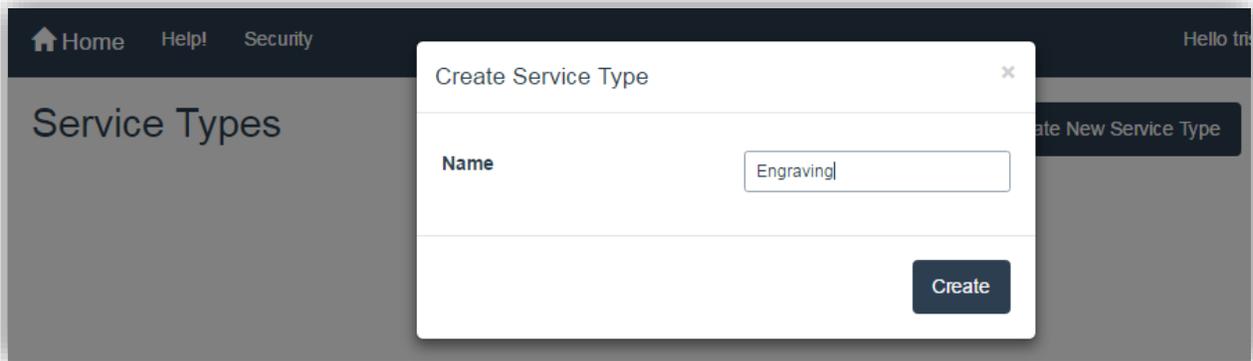
Search

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.



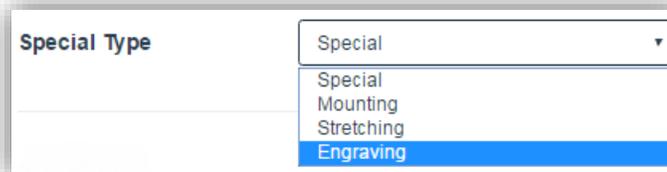
Create Service Type

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



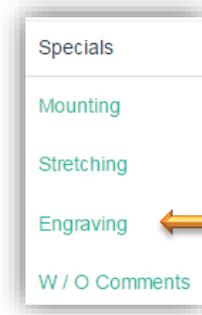
Activate New Service Type

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

Standard		Oversize	
Height	<input type="text" value="60"/>	Labor Cost	<input type="text" value="0"/>
Width	<input type="text" value="60"/>	Labor Markup	<input type="text" value="0"/>
Labor Cost	<input type="text" value="0"/>	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="0"/>
Material Cost	<input type="text" value="0"/>	Material Costing Method	<input type="text" value="Unit"/>
Material Markup	<input type="text" value="2"/>		
Material Costing Method	<input type="text" value="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.

<p>Specials</p> <p>Mounting</p> <p>Stretching</p> <p>Engraving</p> <p>W / O Comments</p>	<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 form titled "Fitting" with a "Unit of Measure" dropdown set to "Inch". The form is divided into two columns: "Standard" and "Oversize".

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	

A "Save" button is located at the bottom right of the form.

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

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

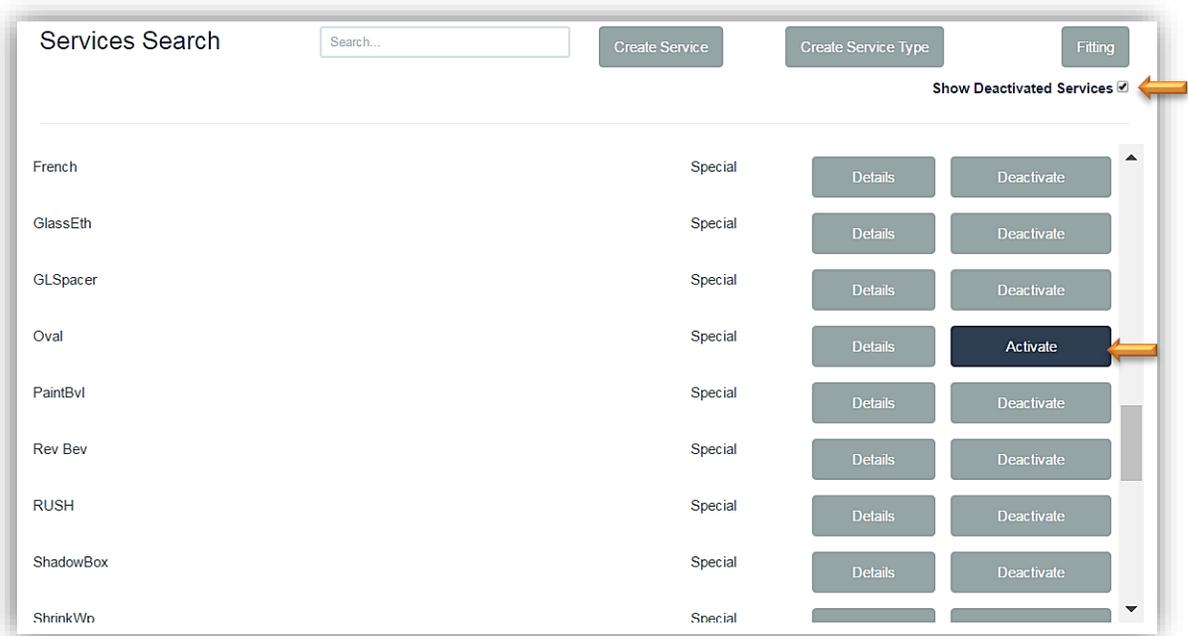
Name	<input type="text" value="AcidFree"/>	Reminder Message	<input type="text"/>
Description	<input type="text"/>	Unit of Measure	<input type="text" value="Inch"/>
Special Type	<input type="text" value="Mounting"/>	Use UI grid pricing?	<input type="checkbox"/>
Min Amount Labor	<input type="text" value="0"/>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

Standard		Oversize	
Height	<input type="text" value="32"/>	Labor Cost	<input type="text" value="0.43"/>
Width	<input type="text" value="40"/>	Labor Markup	<input type="text" value="1"/>
Labor Cost	<input type="text" value="0.43"/>	Labor Costing Method	<input type="text" value="United Inch"/>
Labor Markup	<input type="text" value="1"/>	Material Cost	<input type="text" value="0"/>
Labor Costing Method	<input type="text" value="United Inch"/>	Material Markup	<input type="text" value="1"/>
Material Cost	<input type="text" value="0"/>	Material Costing Method	<input type="text" value="United Inch"/>
Material Markup	<input type="text" value="1"/>		
Material Costing Method	<input type="text" value="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.

The screenshot shows the 'Art Conditions' interface. At the top, there is a 'Create New' button with an orange arrow pointing left, and a 'Show Deactivated Art Conditions' button with an orange arrow pointing right. Below this is a table with two columns: 'Name' and 'Description'. Each row in the table has a corresponding button to its right. The 'Activate' button for 'Accretions' is highlighted with an orange arrow pointing left.

Name	Description	Action
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

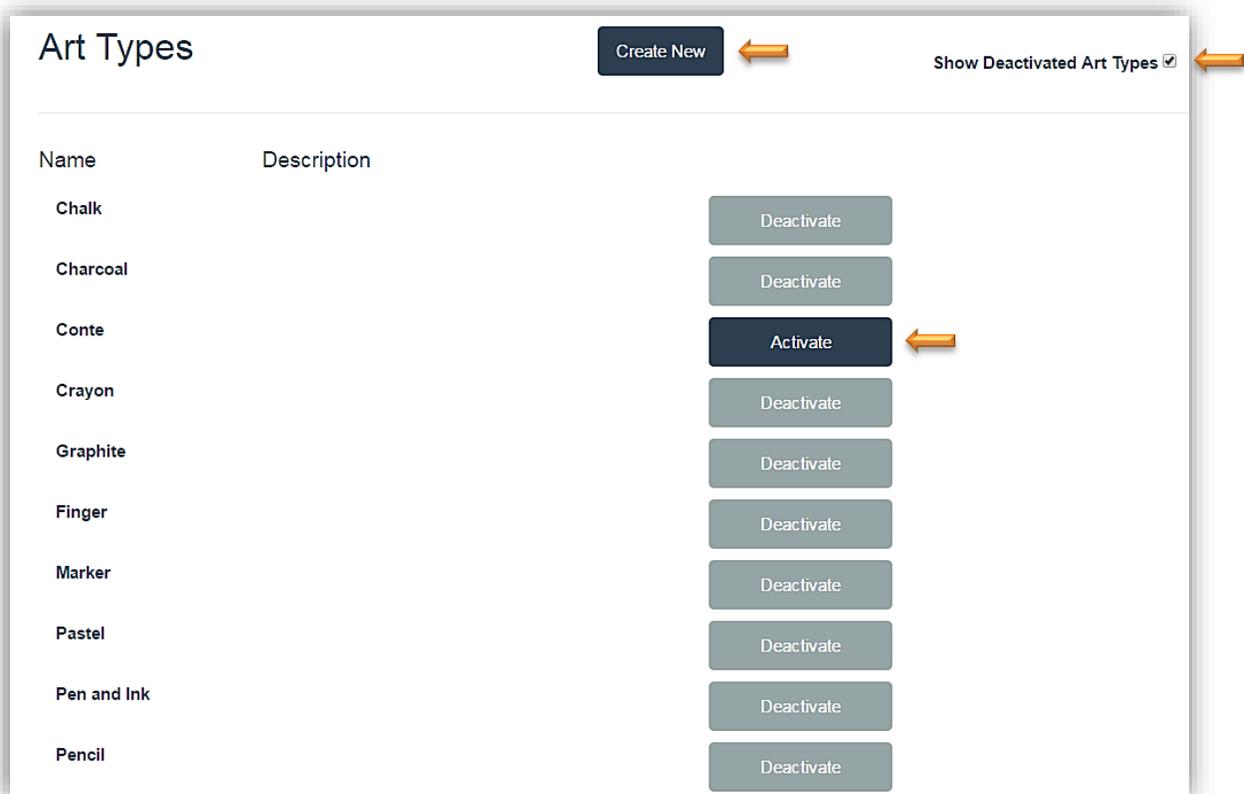
Create New, Activate and Deactivate categories used to note the type of art you are framing in the workorder. Ex: Pastel, Watercolor, Pen and Ink, etc.

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.



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

<p>Title <input type="text" value="The Italian Villa"/></p> <p>Bin <input type="text" value="1"/></p> <p>SKU <input type="text" value="A1234"/></p> <p>UPC <input type="text"/></p> <p>Entered 5/9/2019</p> <p>Description <input type="text" value="The Italian Villa - Print - 20x18"/></p>	<p>Item Number <input type="text" value="A1234"/></p> <p>Active <input checked="" type="checkbox"/></p> <p>Quantity On Hand <input type="text" value="150"/></p> <p>Inventory Threshold <input type="text" value="140"/></p> <p>Art Type: <input type="text" value="Paint - Oil"/></p> <p>Pre-Framed? <input type="checkbox"/></p>
<p>Cost <input type="text" value="175.0000"/></p> <p>Tax Exempt? <input type="checkbox"/></p>	<p>Markup <input type="text" value="2.0000"/></p> <p>Retail <input type="text" value="350.00"/></p>
<p>Consignor <input type="text" value="Art Guye"/></p>	<p>Commission <input type="text" value="75.00"/></p>
<p>Supplier <input type="text"/></p> <p>Class <input type="text"/></p>	<p>Supplier Number <input type="text"/></p> <p>Department <input type="text"/></p>
<p>Image Height <input type="text" value="20"/></p> <p>Paper Height <input type="text" value="0"/></p> <p>Measurement Type: <input type="text" value="Inch"/></p>	<p>Image Width <input type="text" value="18"/></p> <p>Paper Width <input type="text" value="0"/></p>
<p>Artist <input type="text" value="Art Guy"/></p>	<p>Edition Number <input type="text" value="0"/></p>

Create Another?
Save
Cancel

Add Inventory Item - Art

Add / Edit Inventory Inventory Type: Finished Product

<p>Title <input type="text" value="Vanilla Candle"/></p> <p>Bin <input type="text"/></p> <p>SKU <input type="text" value="D1234"/></p> <p>UPC <input type="text"/></p> <p>Entered 5/9/2019</p> <p>Description <input type="text" value="Vanilla Scented - Color : Cream - Pillar Size 3x6"/></p>	<p>Item Number <input type="text" value="D1234"/></p> <p>Active <input checked="" type="checkbox"/></p> <p>Quantity On Hand <input type="text" value="21.0000"/></p> <p>Inventory Threshold <input type="text" value="0.0000"/></p> <p>Unit of Measure Type: <input type="text" value="Each"/></p>
<p>Cost <input type="text" value="10.0000"/></p> <p>Tax Exempt? <input type="checkbox"/></p>	<p>Markup <input type="text" value="3.0000"/></p> <p>Retail <input type="text" value="30.00"/></p>
<p>Supplier <input type="text"/></p> <p>Class <input type="text"/></p>	<p>Supplier Number <input type="text"/></p> <p>Department <input type="text"/></p>
<p>Inside Height <input type="text" value="0.0000"/></p> <p>Outside Height <input type="text" value="3.0000"/></p> <p>Measurement Type: <input type="text" value="Inch"/></p>	<p>Inside Width <input type="text" value="0.0000"/></p> <p>Outside Width <input type="text" value="6.0000"/></p>

Create Another?
Save
Cancel

Add Inventory – Finished Product

Add / Edit Inventory Inventory Type: Supply

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

Create Another?

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.

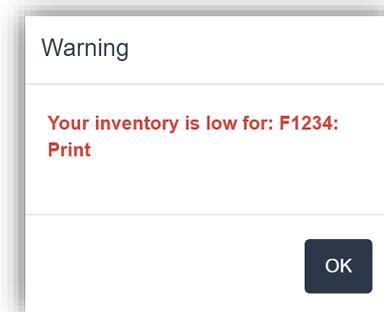
Decrement Inventory:

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

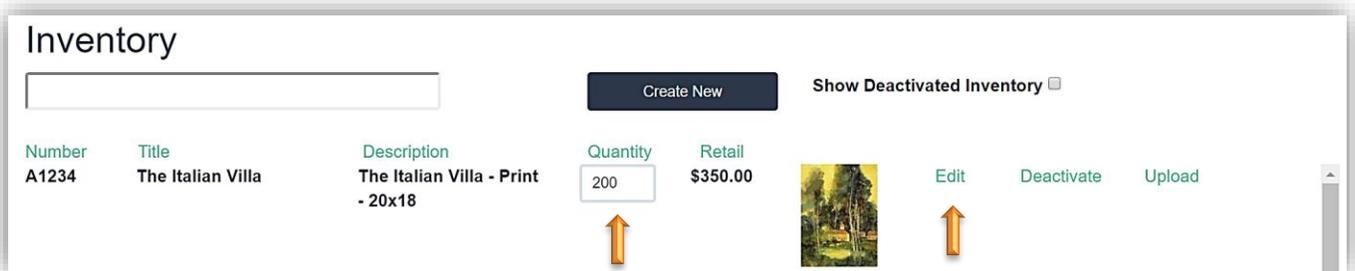
Change/ Add information in the current inventory item record or edit inventory quantity on the inventory main menu.

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.

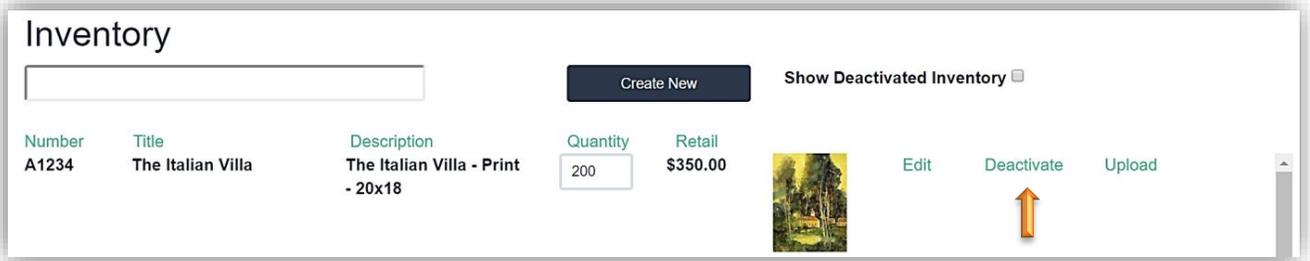


Inventory - Edit Record/Quantity

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

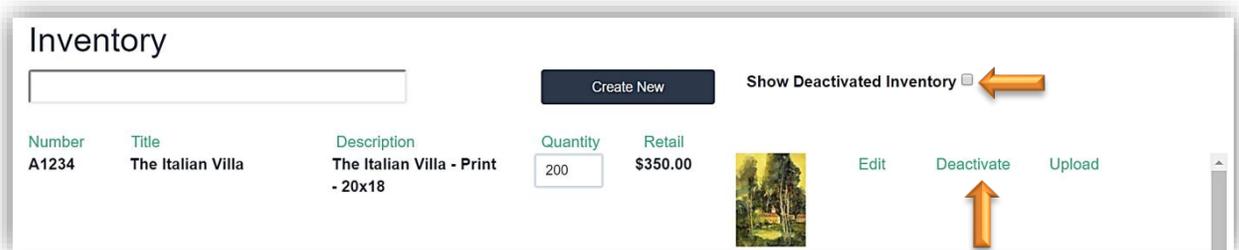
Activate

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.

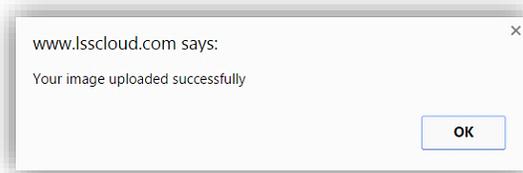
1. On the main Inventory Menu screen. Touch/Click on the **Upload Image** option on the art line item that you would like to upload the image.

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

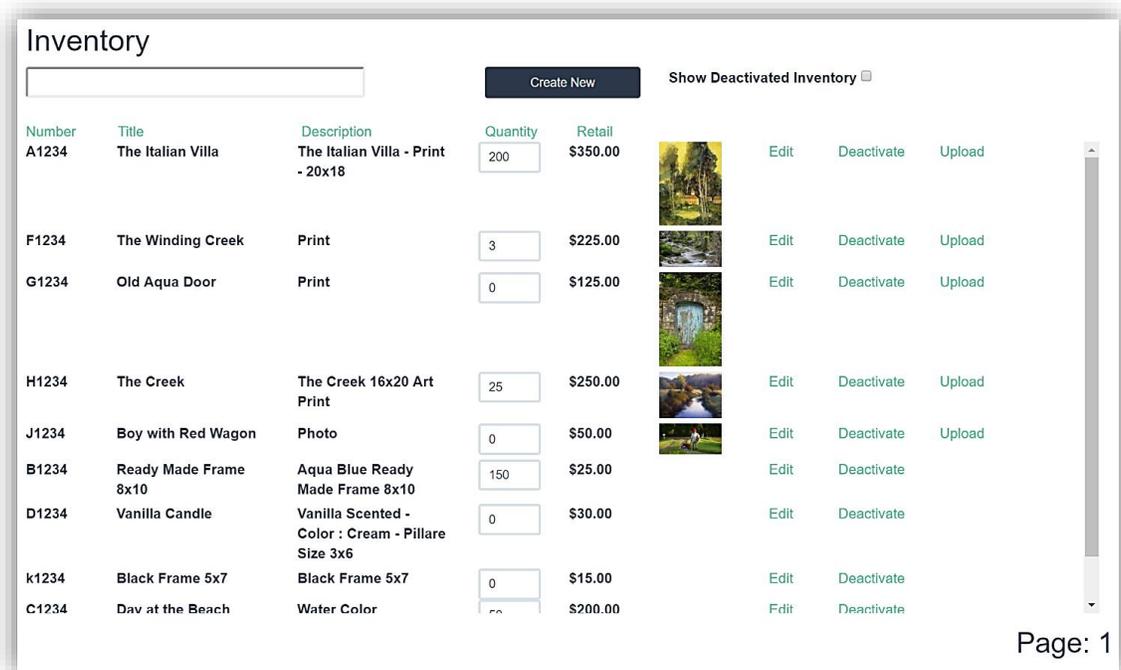
2. The Pictures/Photo Library window will open on your computer/tablet. Touch/Click the desired image/photo/jpeg. It will be necessary to Click the Open button in the window on a desktop.

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.



Number	Title	Description	Quantity	Retail		Edit	Deactivate	Upload
A1234	The Italian Villa	The Italian Villa - Print - 20x18	200	\$350.00		Edit	Deactivate	Upload
F1234	The Winding Creek	Print	3	\$225.00		Edit	Deactivate	Upload
G1234	Old Aqua Door	Print	0	\$125.00		Edit	Deactivate	Upload
H1234	The Creek	The Creek 16x20 Art Print	25	\$250.00		Edit	Deactivate	Upload
J1234	Boy with Red Wagon	Photo	0	\$50.00		Edit	Deactivate	Upload
B1234	Ready Made Frame 8x10	Aqua Blue Ready Made Frame 8x10	150	\$25.00		Edit	Deactivate	
D1234	Vanilla Candle	Vanilla Scented - Color : Cream - Pillare Size 3x6	0	\$30.00		Edit	Deactivate	
K1234	Black Frame 5x7	Black Frame 5x7	0	\$15.00		Edit	Deactivate	
C1234	Dav at the Beach	Water Color	0	\$200.00		Edit	Deactivate	

Page: 1

Inventory Main Menu Screen

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

Workorder Tool Bar Navigation

Home Help! - Security FullScreen Mouldings Mats Hello tiffanytrainee! Log off

- a. **Home** – Touch/Click to return to Home Menu Screen.

You chose to navigate back to the home page. If you continue you will lose any unsaved changes. Do you want to continue?

Cancel Continue

- b. **Help** – Touch Click to access the following:
- User Manuals: Access LSS Cloud user manuals.

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Create a Work Order Guide

Complete User Manual

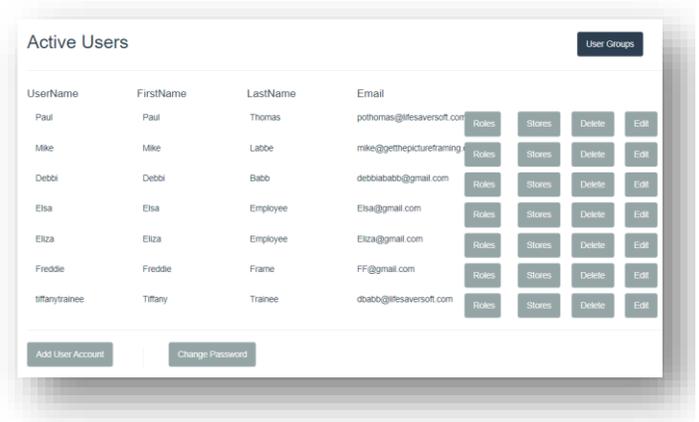
Visualization Guide

Quick Setup Guide

Videos

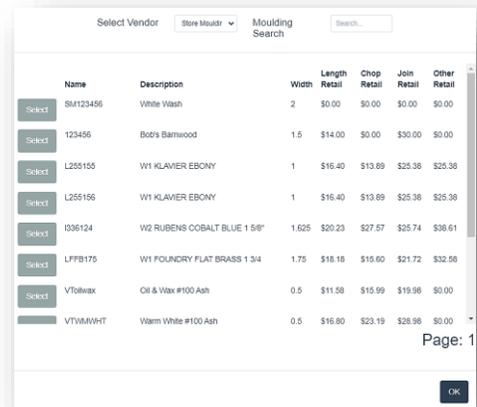
Enterprise User Manual

c. **Security:** Access the Active Users.

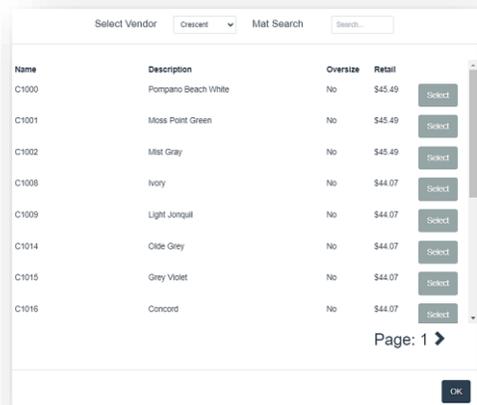


d. **Full Screen:** Touch/Click to enlarge the workorder screen. Will not have access to Chrome tabs or your computer/tablet tool bar. Click Exit Full Screen to return.

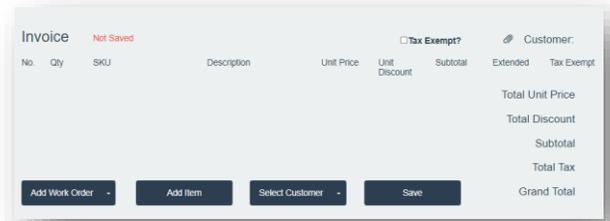
e. **Moulding:** Search and Select Mouldings.



f. **Mats:** Search and Select Mats.



- g.  **Invoice/Quick Sale:** Touch/Click to skip Workorder screen and go directly to the Invoice screen.



- h. Identifies the Username.

Hello tiffanytrainee!

- i. Log Off the program.

Log off

Write Orders

Create and price your custom workorder/invoice. The number of workorders that can be added to the invoice are unlimited.

Screen Navigation Tips

- **Desktop Users:** In most instances, you can press the Tab key to move to the next field, if not, click into the field or on the menu option button to enter/select data.
- **Tablet Users:** The program is easier to view and navigate in landscape mode. Touch the field or the menu option button to add/select data. It is sometimes necessary to click on a blank area of the screen to process the data you have entered.

1. Touch/Click on the **Write Order**  button on the Home screen.

Demo Example Workorder

- Description: ***Confetti Bouquet II***
- Image Size: **20x20**
- Art Condition: ***Good/No Damage***
- Art Type: ***Print***
- Moulding: ***L569240***
- Mat: ***C9503***
- Mat: ***C9889***
- Mat: ***C9546***
- Fillet: ***L100750***
- Glazing: ***Museum***
- Special: ***Reverse Bevel***
- Mounting: ***Acid Free***
- Workorder Notes: ***Include artist's signature***
- Add Art to Workorder: ***Confetti Bouquet II – CB1234***
- Add Misc. Amount to Workorder: ***\$10.00***
- Promotional Discount: ***Summer Sale 10% Off***
- Add Ready-Made Frame: ***B1234*** to the invoice.
- Add ***\$20.00 Shipping Charge*** to the invoice.

2. Touch/Click the ***Description*** field and type the Art description/title. *Demo Example: Confetti Flowers II*

Description

Confetti Flowers II

3. Touch /Click the **Art Condition** button. Touch/Click on a **Condition Type** in the list to specify the condition of the art. Hover your mouse arrow over the damage type to view **Definition**. There is a **Location/Notes** field to document the areas that are damaged on the art and a field to add the **Art Bin** location. *Demo Example: Good/No Damage*. Touch/Click the **OK** button.

Tip: Can select more than one art condition. To remove selection, click on the previous selected art condition type.

Write Order – Art Condition

4. Touch/Click the **Art Type** button. Touch/Click on the **Medium to Specify Art Type**. *Demo Example: “Print”*. Touch/Click the **OK** button.

Tip: Can select more than one art type. To remove selection, click on the previous selected art type.

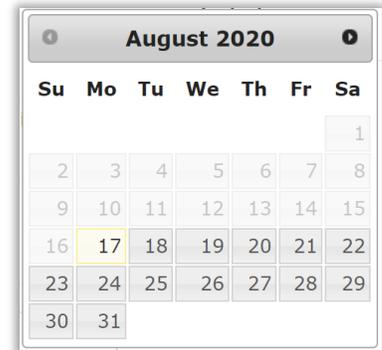
Write Order - Select Art Type

5. Take note of **Due Date** to the right of the Art Type button.

Due Date:
8/31/2020

6. To **Change Due Date**.

- a. Touch/Click Due Date to pull up calendar.
- b. Touch/Click new date/day.
- c. Touch/Click Arrows to the right and left of the month to access the previous/next month.
- d. If the date selected falls before the default due date the word **RUSH** will display in **Red** below the due date. **Rush Fee** will also be selected under Specials.



Due Date:
8/28/2020

RUSH

7. **Image Size**

- a. Touch/Click Height field and **Type in the Height Measurement**. Demo Example: **20'**
- b. Touch/Click Width field and **Type in the Width Measurement**. Demo Example: **20'**

Note: Can enter decimal or fraction measurement into Image Size fields.

8. **Finished Size & Exterior Dimensions** are located to the right of the Height x Width fields. The Finished Size (Internal Dimensions) and Exterior Dimensions will adjust as you add components.

Image Size	Height	20	Width	20	Finished Size: Exterior Dimensions: 27.5 X 27.5 32 7/8 X 32 7/8
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Image, Finished Size & Exterior Dimensions

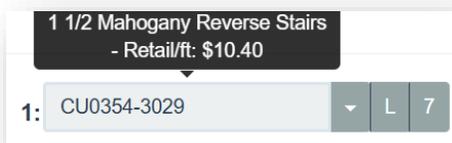
Moulding and Mat Item Number Fields: You will enter your mouldings, stacked mouldings, fillets and mat item numbers into the workorder from outermost to innermost layers.

9. Touch/Click **Moulding** field. Type the moulding item number **L569240**.

- Desktop Users: Press Tab. Hover your mouse arrow over the item code to view moulding description & retail price per foot
- Tablet Users: Touch blank area of screen to process. Touch moulding field to display moulding description.

A second moulding field will populate. Touch/Click 2nd field and type the next moulding or fillet item number if applicable. The workorder will take unlimited moulding item numbers.

10. The **Options Menu Arrow**, **Default Moulding Cut**, **Footage** and **2nd Moulding Field** will display to the right of the 1st moulding field.



11. Each moulding field has the available **Options**. To access - Touch/Click on moulding field **Arrow** to the right of the moulding item number.

a. **Edit:** Touch/Click to change Item number.

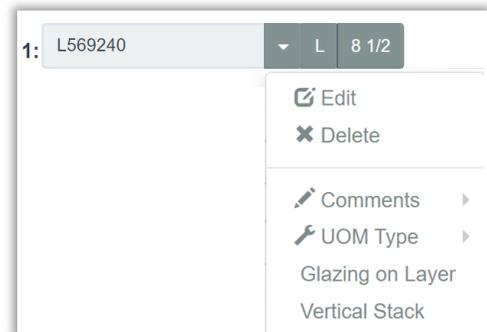
b. **Delete:** Touch/Click to delete moulding.

c. **Comments:** Touch/Click to add comments/instructions in field made available. The notes will print on the workorder copy.

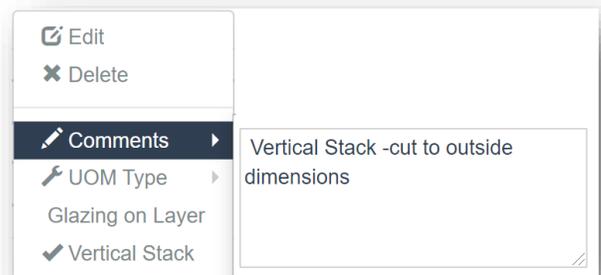
d. **UOM Type:** The default UOM displays to the right of the field. It reflects the default that was selected in the store configuration menu under settings. To change UOM: Touch/Click the desired unit of measure (cut type): Length (L), Chop (C), Join (J), Wedge (W) or Straight (S) Cut.

e. **Glazing on Layer:** Touch/Click to add glazing on this moulding layer.

f. **Vertical Stack:** Touch/Click to vertically stack mouldings. The following default notes will display in the Comments when Vertical Stack is selected: Vertical Stack – cut to outside dimensions.



Moulding Options Menu



Vertical Stack - Default Comments

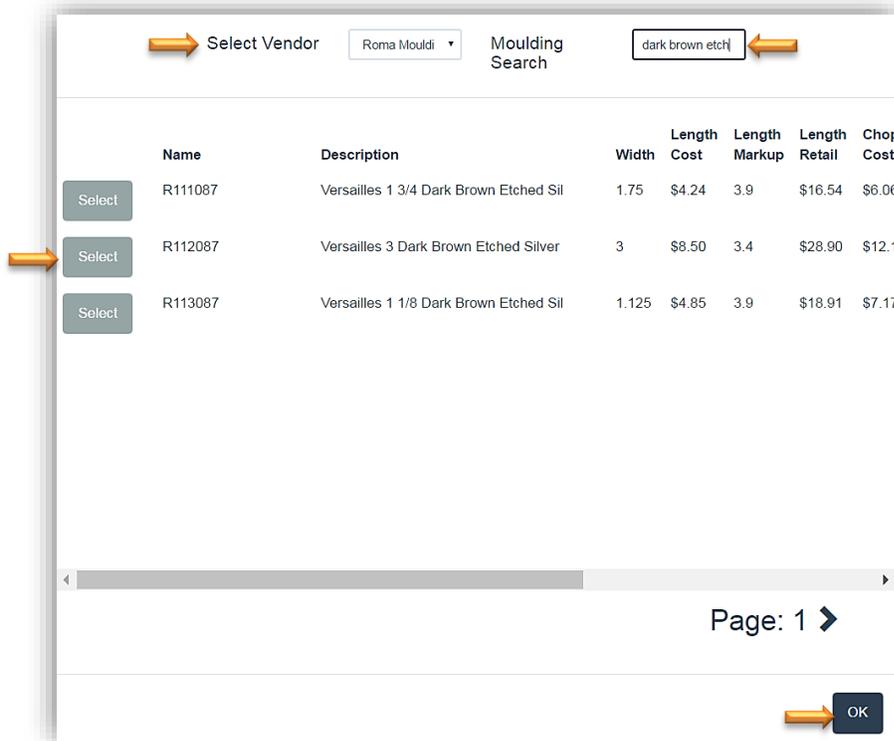
12. **Add Moulding Option - Search/Select/View Moulding Item Number & Details:** This option allows you to **Search and Select** a moulding to add to the workorder or just **View the Details** such as price, width, available colors, etc.

Add Moulding to Workorder using Search Mouldings option.

- Touch/Click **Moulding Field**. Note: *Cursor must be located in an empty moulding field.*
- Touch/Click the **Search Mouldings** option  located in the blue bar at the top of the screen.
- Touch/Click **Select Vendor** drop down arrow. Touch/Click desired vendor. **Demo Example: Roma**
- Touch/Click **Moulding Search** field. Type **Search Data** such as: partial item #, color, width, description etc.
- Touch/Click/Drag bottom Scroll Bar to view all the moulding's line-item details.
- Touch/Click/Drag right Scroll Bar to view entire page contents.
- Touch/Click Next/Previous page arrows to view multiple pages.
- Touch/Click the **Select** button on the desired line item if you would like to add the moulding to the workorder. The item number will auto fill into the moulding field.

Search/View Moulding Details using Search Mouldings option.

- Search and View the Mouldings at any time during the workorder process.
- Touch/Click the **Search Mouldings** option  located in the blue bar at the top of the screen.
- Touch/Click **Select Vendor** drop down arrow. Touch/Click desired **Vendor**. **Demo Example: Roma**
- Touch/Click **Moulding Search** field. Type **Search Data** such as: partial item #, color, width, description etc.
- Touch/Click/Drag bottom Scroll Bar to view the moulding's line-item details.
- Touch/Click/Drag right Scroll Bar to view entire page contents.
- Touch/Click Next/Previous page arrows to view multiple pages.
- Touch/Click **OK** button to **Exit** window.



Write Order Moulding Search/Select/View

13. Mat Reveal: Touch/Click the **Top** reveal field. Type number of inches. Repeat for Bottom, Left and Right reveal fields.

Tips

- The **Reveal** can be set in the Store Configuration menu under the Settings tab. When this configuration has been saved the reveal fields will auto fill.
- **Desktop Users:** Type number of inches in the Top reveal field then press the tab key to auto fill the reveal to the same number of inches for the Bottom, Left and Right.
- **Tablet Users:** Type number of inches in the Top reveal field then touch a blank area of the workorder screen to auto fill the reveal to the same number of inches for the Bottom, Left and Right.
- To **Edit** any of the Top, Bottom, Left or Right reveals. Touch/Click into field, backspace current number to delete and type new measurement into the field.

Mats

Top Bottom Left Right

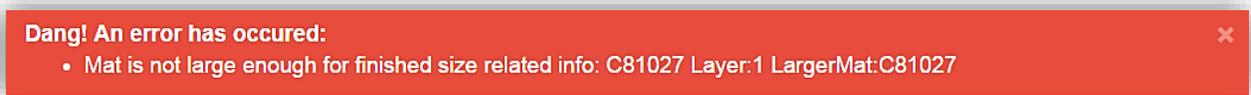
Mat Reveal - Workorder

14. Touch/Click on the **Mat** field. Type mat item number **C9503**.

- Desktop Users: Press Tab. Hover mouse arrow over mat field to display mat color.
- Tablet Users: Touch blank area of screen to process. Touch mat field to display mat color.
A second mat/fillet field will populate.

15. **Over Size Mat:** If a standard mat size item code is entered and the workorder requires an oversize mat, you will receive an alert which contains the corresponding oversize mat item code. The current mat item code will be replaced automatically with the oversize mat item code.

16. **Jumbo Mats:** If you go above the size of 40x60 for a mat you will also receive the error message. If you know that the mat does come in a jumbo size, touch/click the close window X to bypass the error. We have notified the vendors to include the oversize mat skus when they send their data, so we can incorporate them into our program.



Oversize Mat Alert

17. Each **Mat** field has the available **Options**. Touch/Click on the **Mat Field Drop Down Arrow** to access. Touch/Click on desired **Option** to select.

- a. **Edit:** Touch/Click to **Change** mat item number.
- b. **Delete:** Touch/Click to **Remove** mat.
- c. **Template:** Touch/Click to display **Template Options**. Touch/Click **Desired Template**.

- **Multiple Opening Templates:** Type measurement between openings into corresponding fields.

Demo Example: Select Template 23. Both image sizes are 6x6. The A width and B height fields will auto fill with a 6. Field C: Type 1 to represent 1 inch between the two mat openings. Touch/Click **OK** button.

- **Top Mount: Template 35.** The top, bottom, left and right mat widths will be disabled when top mount is selected.
- **V-Groove: Template 16.** Type measurement between the mat opening and V-Groove.

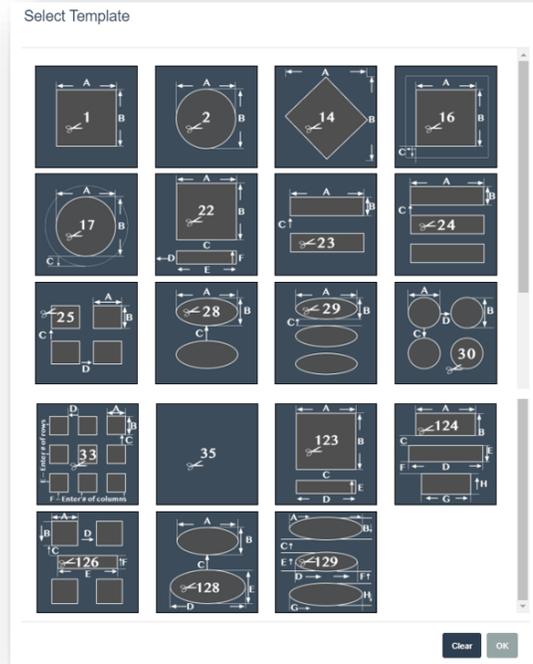
d. **Comments:** Touch/Click to **Add Comments**. Type **Notes** in provided field.

e. **Bevel:** Touch/Click to select **Reverse** or **Standard**.

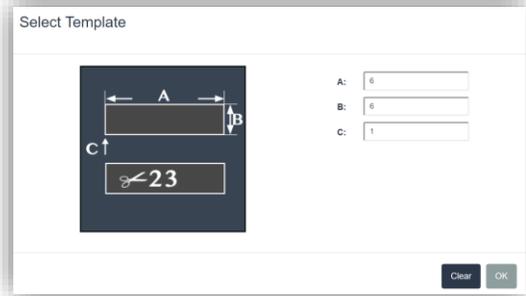
Note: If a fillet is attached to the mat in the workorder screen, it will automatically default to reverse bevel.



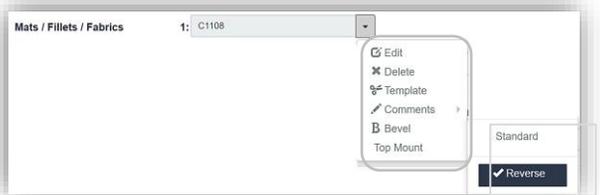
Mat Options



Template Options



Template Dimensions



Bevel Options

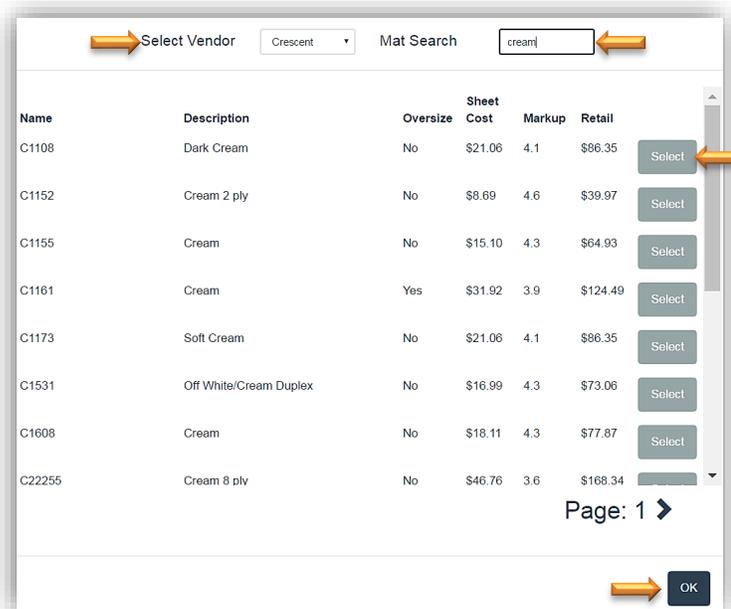
18. **Search/Select/View Mat Item Number & Details:** This option allows you to **Search and Select** a mat to add to the workorder or just **View the Details** such as price, size, available colors, etc.

Add Mat to Workorder using Search Mats option.

- a. Touch/Click **Mat Field**. Note: Cursor must be located in an empty mat field.
- b. Touch/Click the **Search Mats** option  located in the blue bar at the top of the screen.
- c. Touch/Click **Select Vendor** drop down arrow. Touch/Click desired vendor. **Demo Example:** Crescent
- d. Touch/Click **Mat Search field**. Type **Search Data** such as: partial/full item #, color, description etc.
- e. Touch/Click/Drag bottom Scroll Bar to view the mat’s line-item details.
- f. Touch/Click/Drag right Scroll Bar to view entire page contents.
- g. Touch/Click Next/Previous page arrows to view multiple pages.
- h. Touch/Click the **Select** button on the desired line item if you would like to add the mat to the workorder. The item number will auto fill into the field.

Search/View Mat Details using Search Mats option.

- a. Search and View the Mats at any time during the workorder process.
- b. Touch/Click the **Search Mats** option  located in the blue bar at the top of the screen.
- c. Touch/Click **Select Vendor** drop down arrow. Touch/Click desired **Vendor**. **Demo Example:** Crescent
- d. Touch/Click **Mat Search** field. Type **Search Data** such as: partial item #, color, width, description etc.
- e. Touch/Click/Drag bottom Scroll Bar to view the mat’s line-item details.
- f. Touch/Click/Drag right Scroll Bar to view entire page contents.
- g. Touch/Click Next/Previous page arrows to view multiple pages.
- h. Touch/Click **OK** button to **Exit** window.



Write Order – Search Mats

19. Touch/Click on the second **Mat/Fillet** field and type mat item number **C9889**.

- Desktop Users: Press Tab.
- Tablet Users: Touch blank area of screen to process.
- A third mat/fillet field will populate.

Mats / Fillets / Fabrics			
1:	C9503		
2:	C9889	Reveal	1/4
3:	C9546	Reveal	1/4
4:		Reveal	1/4

3 Mats in the Workorder

20. Touch/Click on the third **Mat/Fillet** field and type mat item number **C9546**.

- Desktop Users: Press Tab.
- Tablet Users: Touch blank area of screen to process.
- A fourth mat/fillet field will populate.

21. To **Edit Mat or Reveal**: Touch/Click on the **Reveal Field Drop Down Arrow**. Touch/Click on the desired **Reveal Measurement**.

Tip: Touch/Click & Drag Slider Bar to access larger reveals.

3:	C9546	Reveal	1/4
4:		Reveal	

- 0
- 1/16
- 1/8
- 3/16
- 1/4
- 5/16
- 3/8
- 7/16
- 1/2
- 9/16
- 5/8
- 11/16
- 3/4
- 13/16
- 7/8
- 15/16
- 1

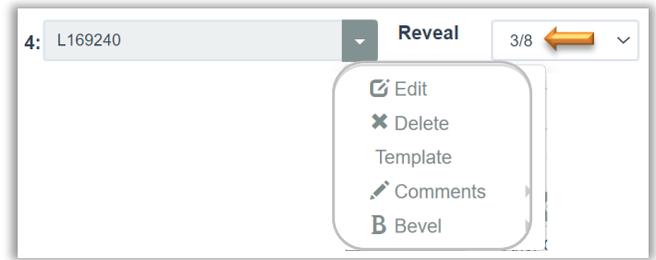
Edit Mat Reveal

22. Touch/Click the second **Mat/Fillet** field in row 4. Type in the fillet item number **L100750**. The reveal will reflect the fillet width.

- Desktop Users: Press Tab.
- Tablet Users: Touch blank area of screen to process.
- A fifth mat/fillet field will populate.

23. The following Fillet **Options** are available.
Touch/Click on field drop down arrow to access.

- a. **Edit:** Touch/Click to change Item number.
- b. **Delete:** Touch/Click to delete moulding.
- c. **Template:** N/A
- d. **Comments:** Touch/Click to add comments/instructions in field made available. The notes will print on the workorder copy.
- e. **Bevel:** N/A
- f. **Reveal:** Fillet Width. Touch/Click reveal drop down arrow to select the actual fillet width if applicable.
- g. **Note:** *The third mat defaulted to a Reverse Bevel (RB) after the fillet was added to the workorder.*



Fillet Options

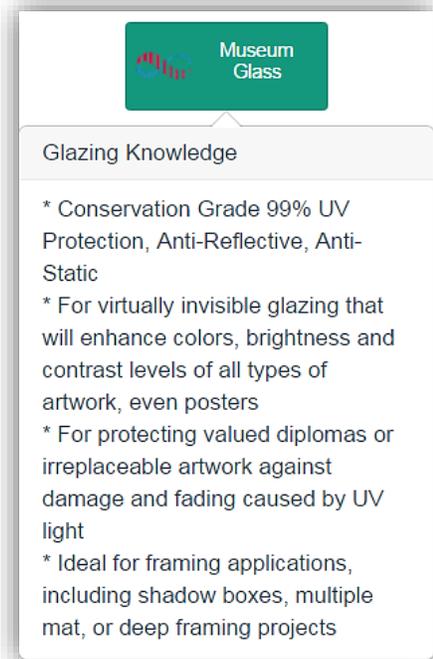


Default Reverse Bevel

24. Select **Glazing**

- a. The program defaults to TruVue Museum glazing.
- b. Touch/Hover Mouse on each glazing option to display each type's knowledge/facts.
- c. To select preferred TruVue glazing type other than Museum. Click/Touch one of the following glazing Type Buttons: Conservation Clear Acrylic, Conservation Reflection Control, Conservation Clear or No Glazing.
- d. Touch/Click on the Other Glazing drop down field arrow located under the No Glazing button to select a glazing type that is not listed on the workorder screen.
- e. When selected, the Glazing Type button will change to teal blue.
- f. Workorder *Demo Example: **Museum Glazing***

Tip: *Touch/Click each glazing type button to reveal cost in the totals column under Glass. To change glazing type touch/click on the new desired glazing button. The glazing charge in the totals column will reflect the new glazing type selected.*



Glazing Knowledge - Museum

Conservation Clear Acrylic Museum Glass Conservation Reflection Control Conservation Clear No Glazing

Other Glazing...
Other Glazing...
Glass
 AR Reflection Free - AR Reflection Free®
 Premium Clear - Premium Clear
 Reflection Control - Reflection Control®
 UltraVue - UltraVue®
Acrylic
 Conservation Reflection Control Acrylic - Conservation Reflection Control® Acrylic
 Optium Acrylic - Optium Acrylic®
 Optium Museum Acrylic - Optium Museum Acrylic®
 Optium Museum Acrylic 4.5mm - Optium Museum Acrylic® 4.5mm
 Optium Museum Acrylic 6mm - Optium Museum Acrylic® 6mm
 Reflection Control Acrylic - Reflection Control® Acrylic
 StaticShield™ Acrylic - StaticShield™ Acrylic

Glazing Options

Description Flowers **Good / No Damage** **Print** **Due Date:** 2/28/2025

Image Size Height: 20 Width: 20 **Finished Size:** 29.5 X 29.5 **Exterior Dimensions:** 34 7/8 X 34 7/8

Mouldings 1: L569240 L 12 2:

Mats Top: 4 Bottom: 4 Left: 4 Right: 4

Mats / Fillets / Fabrics

1:	C9503		
2:	C9889	Reveal	1/4
3:	C9546	RB	1/4
4:	L100750	Reveal	1/4
5:		Reveal	1/4

TRU VUE Optium Museum Acrylic
 TRU VUE Museum Glass
 TRU VUE Conservation Reflection Control
 TRU VUE Conservation Clear Acrylic
 TRU VUE Conservation Clear
 No Glazing

Specials

- 1 HrLbr
- 1/2HrLbr
- 2 HrLbr
- 4 HrLbr
- 7 HrLbr
- Cust Fra
- Cust Mat
- FCSpacer
- Fr Line
- Fr Tape
- French
- GlassEth
- GLSpacer
- Oval
- PaintBvl
- Rev Bev
- RUSH
- ShadowBox
- ShrinkWp
- SpclCuts
- TieredMt
- V-Groove
- Xtra-FIT

[Mounting](#)
[Stretching](#)
[Engraving](#)
[W / O Comments](#)

Workorder Demo Example: Description, Art Condition/Type, Due Date, Image Size, Finished Size, Mouldings, Mats, Fillet and Museum Glazing.

25. Select corresponding **Additional labor** and **Material Costs** under the **Specials** tab.

- a. Touch/Click in the field adjacent to the preferred special to select.
- b. Touch/Click **Reverse Bevel** for our workorder demo example.
- c. If the quantity is greater than one, Touch/Click on the quantity up/down field arrows to select desired quantity. **Demo Example:** 1 Hour Labor – Change to quantity 2 to charge for 2 hours labor.

Note: To remove a selected special, Touch/Click on the special to de-select. Configure/Set your store's specials by type, labor and material price in the Services (Specials) menu.

Specials	<input type="checkbox"/> 1 HrLbr	<input type="checkbox"/> Fr Line	<input type="checkbox"/> RUSH
Mounting	<input type="checkbox"/> 1/2HrLbr	<input type="checkbox"/> Fr Tape	<input type="checkbox"/> ShadowBox
Stretching	<input type="checkbox"/> 2 HrLbr	<input type="checkbox"/> French	<input type="checkbox"/> ShrinkWp
Engraving	<input type="checkbox"/> 4 HrLbr	<input type="checkbox"/> GlassEth	<input type="checkbox"/> SpclCuts
W / O Comments	<input type="checkbox"/> 7 HrLbr	<input type="checkbox"/> GLSpacer	<input type="checkbox"/> TieredMt
	<input type="checkbox"/> Cust Fra	<input type="checkbox"/> Oval	<input type="checkbox"/> V-Groove
	<input type="checkbox"/> Cust Mat	<input type="checkbox"/> PaintBvl	<input type="checkbox"/> Xtra-FIT
	<input type="checkbox"/> FCSpacer	<input checked="" type="checkbox"/> Rev Bev	<input type="text" value="1"/>

Workorder Specials

26. Touch/Click on the **Mounting** tab adjacent to the Specials tab to select type of mounting. Touch/Click **Acid Free** for our workorder demo example.

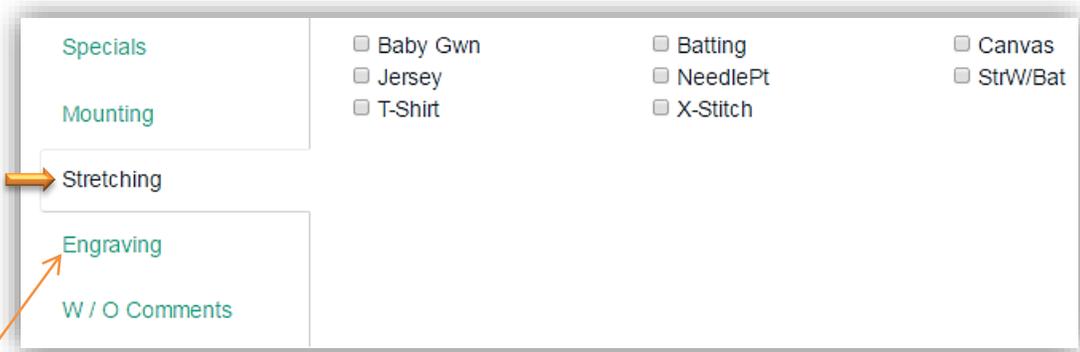
Note: The Mounting tab functions the same as the specials tab. Refer to the instructions under the Specials tab above.

Specials	<input type="checkbox"/> 3xBoard	<input type="checkbox"/> Crdboard	<input type="checkbox"/> Foamcore
Mounting	<input type="checkbox"/> A Fw Art	<input type="checkbox"/> DMBlackM	<input type="checkbox"/> Museum
Stretching	<input checked="" type="checkbox"/> AcidFree	<input type="checkbox"/> DrymtFC	<input type="checkbox"/> X-board
Engraving	<input type="checkbox"/> BlackFC	<input type="checkbox"/> DrymtXB	
W / O Comments	<input type="checkbox"/> CanvasXf		

Workorder Mounting Types

27. Touch/Click on **Stretching Tab** to select the stretching type. Stretching does not apply to our demo example workorder, so we will not make a selection.

Note: This tab functions the same as the Specials and Mounting tabs. Refer to the instructions under the Specials.



Workorder Stretching Types

* **Note:** The Engraving tab was a Service (Special) Type added to the LifeSaver Training Gallery store. See Add Service (Special) Type instructions under the Service (Special) section.

28. Touch/Click on the **W/O Comments Tab** to type additional instructions or notes that pertain to the workorder.



Workorder Comments

29. Add **Art/Supply to Workorder**: If you are selling the art you are custom framing, it can be added to the corresponding workorder. The art item/finished product/supply item has to have been previously added to the inventory menu.

Demo Example: Confetti Bouquet II – Item: CB1234

- a. Touch/Click on **Art/Supply +** in the Total column.
- b. Type the art's **Item Number CB1234** into the first field.
*Note: If unsure of the art item number touch/click the **Browse Art** button to list all products listed under the art category in your store inventory. Touch/Click the **Select** button on the appropriate line item.*
- c. Type **Quantity 1**.
- d. **Unit Price \$187.50** will auto fill with the price that was previously programed.
- e. Touch/Click the **OK** button.

Art Entry
Browse Art

Item Number	Quantity	On Hand	Description	Unit Price	Total
<input type="text" value="CB1234"/>	<input type="text" value="1"/>	96	18x18 Print by Erica June Vess	187.5	\$187.50
<input type="text"/>	<input type="text"/>				
<input type="text"/>	<input type="text"/>				
<input type="text"/>	<input type="text"/>				
<input type="text"/>	<input type="text"/>				
<input type="text"/>	<input type="text"/>				
<input type="text"/>	<input type="text"/>				
<input type="text"/>	<input type="text"/>				
<input type="text"/>	<input type="text"/>				
<input type="text"/>	<input type="text"/>				

Cancel
OK

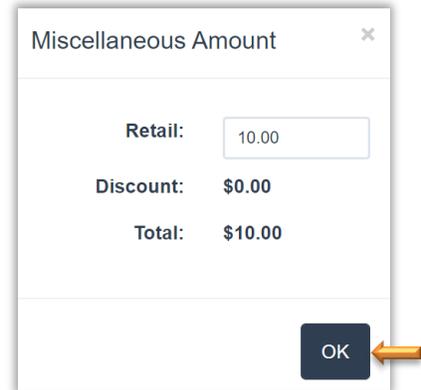
Add Art/Supply Window

30. Add **Miscellaneous Amount/Charge** to Workorder: *Add a miscellaneous dollar amount to the workorder. No description is required.*

Workorder Demo Example: \$10.00

- a. Touch/Click the **Misc. +** button in the Totals column.
- b. Type **Dollar Amount** into Miscellaneous Amount Entry field.
- c. If a discount was applied to the workorder, the discounted amount will display.
- d. Touch/Click **OK** button.
- e. Amount will display in the write order total column adjacent to Misc +.

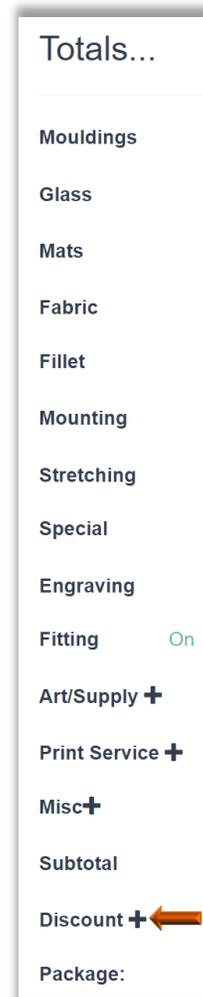
Tip: Touch/Click X located upper right window to escape if needed.



A screenshot of a 'Miscellaneous Amount' entry window. The window has a title bar with a close button (X) in the top right corner. Below the title bar, there are three rows of text: 'Retail: 10.00', 'Discount: \$0.00', and 'Total: \$10.00'. The '10.00' is entered into a text input field. At the bottom right of the window is a dark blue 'OK' button with a white arrow pointing to it from the right.

Misc. Amount Entry Window

31. Touch/Click on **Discount +** at the bottom of the Totals column to apply a **Promotion or Manager Override Discount**.



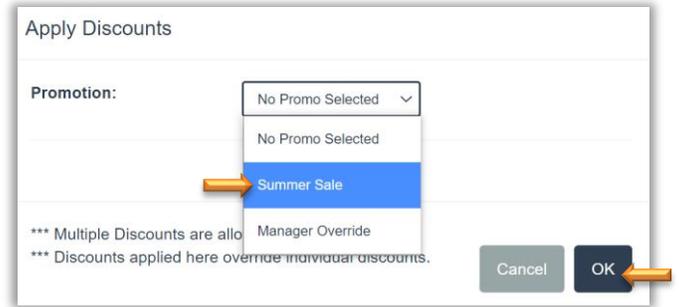
A vertical menu titled 'Totals...'. The menu items are: Mouldings, Glass, Mats, Fabric, Fillet, Mounting, Stretching, Special, Engraving, Fitting (with 'On' in green text), Art/Supply +, Print Service +, Misc+, Subtotal, Discount + (with an orange arrow pointing to it from the right), and Package:.

a. **Promotion**

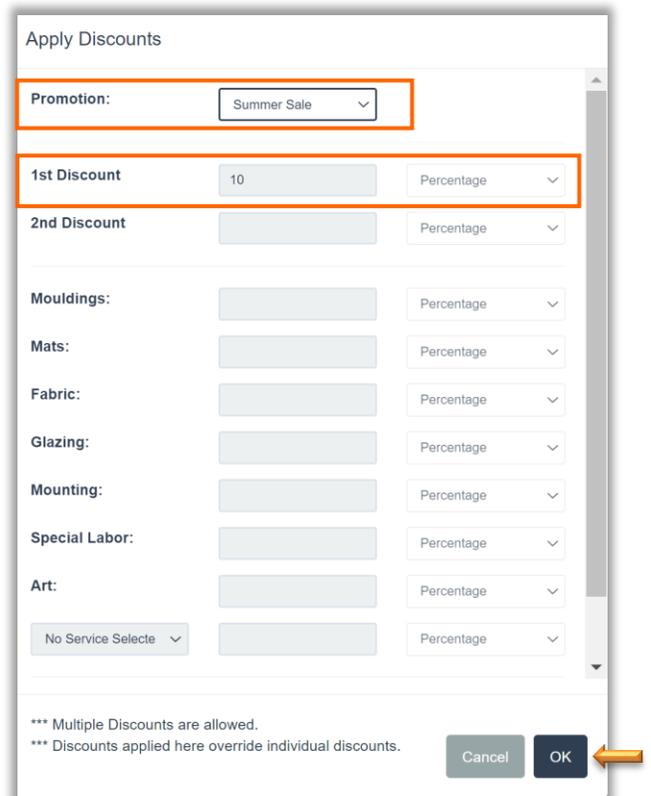
Promotion types must be created previously under the Promotion button on the Home screen.

- Touch/Click the **Promotion** drop down list.
- Touch/Click the **Promotion Type** in the list.
- **Demo Example** shown right in discount window is **Summer Sale** which was created to give the customer a 10% discount.
- The Apply Discount window will display.
- The Discount applies to the current Workorder. The discount does not apply to Art added to the workorder. Add the art to the invoice to discount.
- Touch/Click **OK** to apply promotion discount to the workorder.

Note: *The Discount + must be selected and applied for any additional workorders that you would like to contain a discount. To discount an invoice item, touch/click Unit Discount field on the line item in the invoice window. Select Promotion. Multiple discounts are allowed. Applied Promotion/Manager Override Reason will list in Totals column with the discounted amount that was applied.*



Select Discount Type

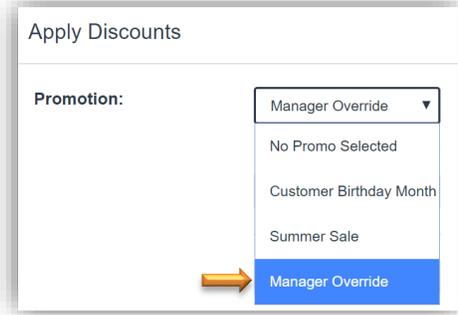


Apply Discount

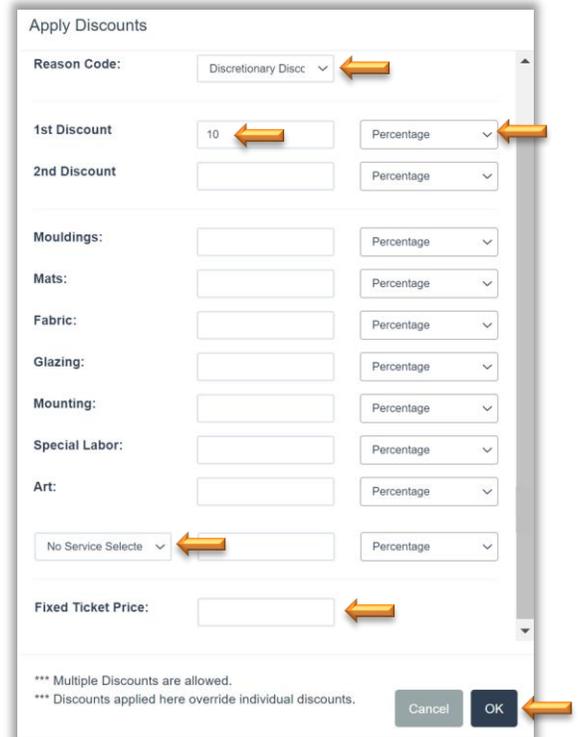
b. **Manager Override**

A discount requires a Manager Override Reason to be selected. The reasons need to be created in the Manager Override Menu. Employee Permissions for Manager Override authority are located in the Security menu.

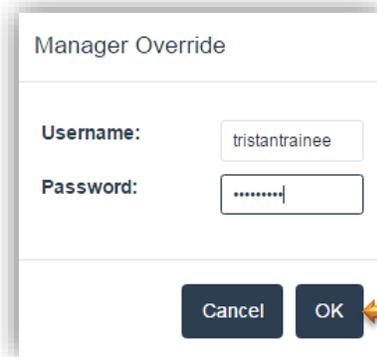
- Touch/Click the **Promotion** drop down list.
- Touch/Click **Manager Override** in the drop-down list.
- Touch/Click **Reason Code** in the drop-down list.
- Identify the **Category Line Item** you would like to discount.
- Type **the \$ amount or % amount discount** in the field to the left of the discount type.
- Touch/Click the **Discount Type** drop down field arrow on the selected category row.
- Touch/Click on the type of discount you would like to apply: Percentage **or Fixed Amount**.
- Select **Service** type to be discounted if applicable.
- Alternatively, you can type a total amount for the workorder in the **Fixed Ticket Price** field.
- Touch/Click **OK**.
- If the employee does not have Manager Override authority they will receive a prompt that requires an **Authorized Username and Password login**.
- Authorized User: **Type Username and Password**. Touch/Click **Ok** button.
- **Demo Example Workorder 10% Discount on Entire Workorder**: Touch/Click Manager Override Reason: **Discretionary Discount**. Type **10** into the **Entire Ticket** field. Touch/Click the **Discount Type** drop down. Touch/Click **Percent**.
- Touch/Click **OK** button to apply discount. Discount amount will be reflected in the Totals column.



Apply Discount – Mgr. Override



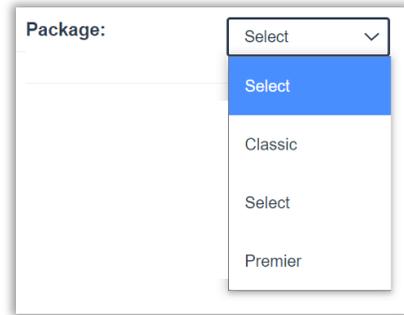
Apply Discount – Mgr. Override – Discretionary Discount



Manager Override Authorization

32. **Package Pricing:** Touch/Click the Package drop-down arrow. Select **Pricing Package**.

Note: See *Package Pricing for Set-Up and Workorder Instructions*.



Select Pricing Package

33. **Totals Column** - The following categories appear in the totals column with their cost. Does not include tax.

- Components Retail Price 
- Mouldings
- Glass
- Mats
- Fabric
- Fillet
- Mounting
- Stretching
- Special
- Fitting: Toggle the Fitting Fee on or off by Touching/Clicking the Blue **On/Off** located to the left of the fitting fee dollar amount.
- Art +
- Misc. +
- Subtotal
- Manager Override (*Discount and or Promotion applied.*)

Totals...	
Mouldings	\$328.86
Glass	\$369.06
Mats	\$74.79
Fabric	
Fillet	\$99.26
Mounting	\$22.83
Stretching	
Special	\$13.28
Engraving	
Fitting On	\$32.92
Art/Supply 	\$187.50
Print Service 	
Misc 	\$9.00
Subtotal	\$1,137.50
Summer Sale 	\$105.55
Package:	Select 
<div style="display: flex; justify-content: space-between;"> <div> <div style="background-color: #333; color: white; padding: 5px; margin-bottom: 5px;">Update Invoice</div> <div style="background-color: #ccc; padding: 5px; margin-bottom: 5px;">Repeat</div> </div> <div> <div style="background-color: #ccc; padding: 5px; margin-bottom: 5px;">Clear</div> <div style="background-color: #333; color: white; padding: 5px;">Upload Image</div> </div> </div>	

Workorder Totals Column

34. Components Retail Price  : Touch Click icon to **View Individual Component Cost and your Retail Prices**. The file is listed at the bottom of the window. It is not labeled. Click on **Icon** to exit component retail price window.

Component	Cost	Retail
L569240	\$121.80	\$339.66
C9503	\$11.31	\$43.76
C9889	\$11.31	\$43.77
C9546	\$11.31	\$43.77
	\$28.28	\$105.56
Museum Glass®	\$200.03	\$369.06
Rev Bev	\$14.75	\$13.28
Engraving	\$0.00	\$0.00
AcidFree	\$25.37	\$22.83
	\$28.28	\$105.56

Component Cost - Retail Price

Note: This is a store configure option under the settings tab. You must Select and Save.

Show Cost On Write Orders
 Screen?

35. The following four options are available:

- **Add To Invoice:** Touch/Click this button to proceed and save the workorder.
- **Clear:** Touch/Click this button to clear workorder screen. You will not be able to recover the work order.
- **Repeat:** Copy the current workorder. The repeat option allows editing on the new order. See *instructions in the Repeat Workorder section.*
- **Upload Image:** Upload an image from your Picture Library, FrameVue App or Capture a Photo with you device camera. See *instructions in the FrameVue User Guide.*

36. Touch/Click **Add to Invoice**.

Home Help! Security FullScreen
Mouldings Mats Hello tiffanytrainee! Log off

Description Good / No Damage Print Due Date: 3/4/2025

Image Size Height: Width: Finished Size: 29.5 X 29.5 Exterior Dimensions: 34 7/8 X 34 7/8

Mouldings 1: L 12 2:

Mats Top: Bottom: Left: Right:

Mats / Fillets / Fabrics

1: <input type="text" value="C9503"/> Deep BlueSelect		
2: <input type="text" value="C9889"/> -	Reveal	<input type="text" value="1/4"/> <input type="button" value="v"/>
3: <input type="text" value="C9546"/> RB	Reveal	<input type="text" value="1/4"/> <input type="button" value="v"/>
4: <input type="text" value="L100750"/> -	Reveal	<input type="text" value="1/4"/> <input type="button" value="v"/>
5: <input type="text"/>	Reveal	<input type="text" value="1/4"/> <input type="button" value="v"/>

Totals...

Mouldings \$328.86

Glass \$369.06

Mats \$74.79

Fabric

Fillet \$99.26

Mounting \$22.83

Stretching

Special \$13.28

Engraving

Fitting On \$32.92

Art/Supply \$187.50

Print Service

Misc \$9.00

Subtotal \$1,137.50

Summer Sale \$105.55

Package:

Specials

Mounting

Stretching

Engraving

W / O Comments

<input type="checkbox"/> 3xBoard	<input type="checkbox"/> Crdboard	<input type="checkbox"/> Foamcore
<input type="checkbox"/> AJFw/Art	<input type="checkbox"/> DMBlackM	<input type="checkbox"/> Museum
<input checked="" type="checkbox"/> AcidFree <input type="text" value="1"/>	<input type="checkbox"/> DrymtFC	<input type="checkbox"/> X-board
<input type="checkbox"/> BlackFC	<input type="checkbox"/> DrymtXB	
<input type="checkbox"/> CanvasXf		

➔

Add To Invoice

Clear

Repeat

Upload Image



Completed Workorder Screen With FrameVue Visualization. See FrameVue User Guide for Instructions.

Create Invoice

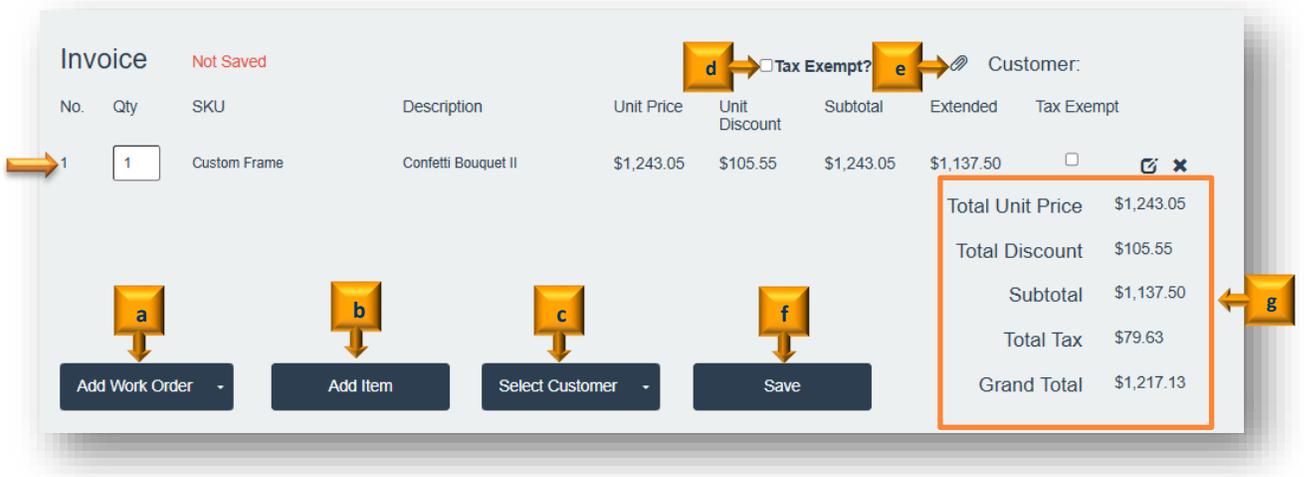
Add additional workorders or store inventory items such as Art, Gift Certificates, Ready Made Frames, Gift Items or misc. charges such as Shipping Fees etc. Add/Select customer profile. Create a quote. View total for both the invoice and workorder.

1. When you Touch/Click the **Add To Invoice** button the Gray Invoice Window will appear on the screen. *Currently the Invoice reflects our "Confetti Bouquet II" custom workorder on line 1. The line item lists the item's: Quantity, Sku, Description, Unit Price, Unit Discount, Total Discount, Subtotal, Tax and Total.*

Note: You can also access the Gray Invoice Window by Touching/Clicking on the Invoice Icon  located in the top right blue menu bar.

The following functions/options are available in the Invoice Window.

- Add Workorder:** Touch/Click button to Add a **New Workorder** to the invoice. Touch/Click the Add Workorder drop-down arrow. Touch/Click Copy **Previous Workorder** to copy a previous workorder.
- Add Item:** Copy Previous Workorder, Art/Gift items, Manual Entry items, Activate Gift Card & Printing Services.
- Select Customer:** Add New or Existing Customer Profile.
- Tax Exempt:** Activated (Represented by a check mark in the field box.) or De-activated (Represented by a blank field box.) Touch/Click Tax Exempt field box to Activate or Deactivate. If the Tax ID has been previously added to the customer's profile the Tax-Exempt field will automatically be activated and noted with a check mark.
- Paper Clip -Attach Purchase Order Number:** Touch/Click Paper Clip icon to display pop up window. Type Purchase Order Number in the Field provided. Touch/Click OK.
- Save:** Save the workorder/invoice and proceed to the payment screen.
- Current Invoice Totals:** Total Price, Total Discount, Subtotal, Total Tax & Grand Total.



The screenshot shows the 'Invoice' window with a 'Not Saved' status. It features a table with columns for No., Qty, SKU, Description, Unit Price, Unit Discount, Subtotal, Extended, and Tax Exempt. A single line item is visible: '1' quantity of 'Custom Frame' (SKU: Confetti Bouquet II) with a unit price of \$1,243.05 and a unit discount of \$105.55. Below the table are four buttons: 'Add Work Order', 'Add Item', 'Select Customer', and 'Save'. To the right, there are checkboxes for 'Tax Exempt?' and 'Customer:'. A summary box on the right lists: Total Unit Price (\$1,243.05), Total Discount (\$105.55), Subtotal (\$1,137.50), Total Tax (\$79.63), and Grand Total (\$1,217.13). Callouts 'a' through 'g' point to various UI elements: 'a' to the 'Add Work Order' button, 'b' to the 'Add Item' button, 'c' to the 'Select Customer' button, 'd' to the 'Tax Exempt?' checkbox, 'e' to the 'Customer:' field, 'f' to the 'Save' button, and 'g' to the summary box.

No.	Qty	SKU	Description	Unit Price	Unit Discount	Subtotal	Extended	Tax Exempt
1	1	Custom Frame	Confetti Bouquet II	\$1,243.05	\$105.55	\$1,243.05	\$1,137.50	<input type="checkbox"/>

Total Unit Price	\$1,243.05
Total Discount	\$105.55
Subtotal	\$1,137.50
Total Tax	\$79.63
Grand Total	\$1,217.13

Invoice Window

2. Touch/Click **Add Item** button. The following options are available in the Add Item window.

- a. **Add an Inventory** item to the invoice that is currently programmed into your inventory.
- b. **Previous Workorder:** Search and Copy Workorder.
- c. **Manual Item Entry:** Add an Inventory Item/Fee/Service to the invoice that is not currently programed in your inventory.
- d. **Activate Gift Card:** Activate your store's gift card for purchase.
- e. **Printing Services:** Coming Soon!

SKU	UPC	Item Number	Description	Price	Quantity
-----	-----	-------------	-------------	-------	----------

Add Item Window

3. Add Inventory item.

- a. **Workorder Demo Example:** 8x10 Ready-Made Frame
- b. Touch/Click and complete one of the following fields to search and add your item to the invoice; **SKU, UPC, Item Number or Description.**
- c. Touch/Click the **SKU** field and type **B1234**. Products will populate in the list below that contain the same digit/letter that you are typing into the field. The data you enter into the field must match the inventory item record you created.
- d. Touch/Click on the **Select** button on the line item that you would like to add to the invoice.

SKU	UPC	Item Number	Description	Price	Quantity
B1234		B1234	Aqua Blue Ready Made Frame 8x10	\$25.00	69

Add Inventory Item

- The Frame will list in the **Invoice Window on line 2.**

No.	Qty	SKU	Description	Unit Price	Unit Discount	Subtotal	Extended	Tax Exempt
1	1	Custom Frame	Confetti Bouquet II	\$1,243.05	\$105.55	\$1,243.05	\$1,137.50	<input type="checkbox"/>
2	1	B1234	Aqua Blue Ready Made Frame 8x10	\$25.00	\$0.00	\$25.00	\$25.00	<input type="checkbox"/>

Total Unit Price \$1,268.05
 Total Discount \$105.55
 Subtotal \$1,162.50
 Total Tax \$81.38
 Grand Total \$1,243.88

Invoice Window - Add Inventory Item

4. Add additional items manually to the invoice that are not a part of your store inventory records.

Demo Example Workorder: Shipping Charge: \$20.00

- a. Touch/Click **Add Item** button in the Invoice window.
- b. Touch/Click on the **Manual Item Entry** button in the Add Item window.
Note: This will return you to the Blue Invoice Window to manually type the item's info on line 3.
- c. Touch/Click **SKU** field to type item/sku number. Workorder Demo Example has no sku/item number.
- d. Touch/Click Description field to type **"Shipping Fee"** in the **Description Name**.
- e. Touch/Click the Unit Price Field to type **Price (\$20.00)** of item.
- f. Touch/Click Unit Discount field and enter \$ Discount Amount if applicable.

No.	Qty	SKU	Description	Unit Price	Unit Discount	Subtotal	Extended	Tax Exempt
1	1	Custom Frame	Confetti Bouquet II	\$1,243.05	\$105.55	\$1,243.05	\$1,137.50	<input type="checkbox"/>
2	1	B1234	Aqua Blue Ready Made Frame 8x10	\$25.00	\$0.00	\$25.00	\$25.00	<input type="checkbox"/>
3	1		Shipping Fee	\$20.00	\$0.00	\$20.00	\$20.00	<input type="checkbox"/>

Total Unit Price \$1,288.05
 Total Discount \$105.55
 Subtotal \$1,182.50
 Total Tax \$82.78
 Grand Total \$1,265.28

Invoice Window - Add Manual Item

5. The following line item options are available in the Invoice window.

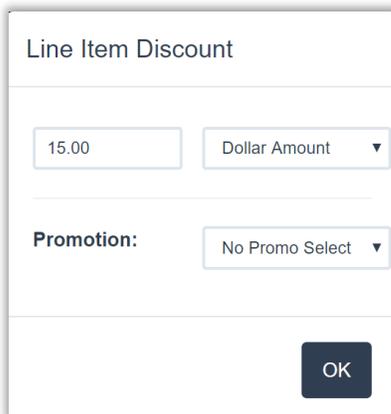
- a. **Tax Exempt:** Touch/Click **Tax Exempt** field located top right to remove tax from the entire invoice.

*Note:*The tax exempt number can be added to the customer's profile, so it will automatically default to tax exempt. Touch/Click **Tax Exempt** field box on the desired invoice line item to remove tax from a single item.

- b. **Edit Line:** Touch/ Click on the **Edit** icon  on the line item to be changed.

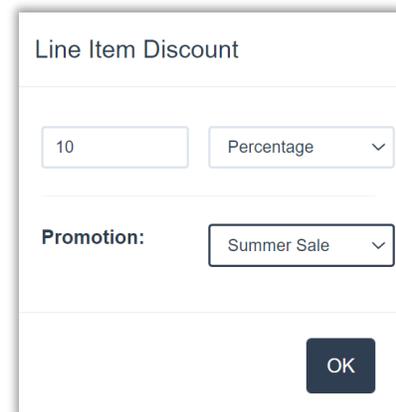
- **Inventory Items and Manually Entered Item** lines: Touch/Click into **Field to Edit**. The only fields eligible for editing are white in color which are Quantity and Unit Discount.

- To add discount. Touch/Click **Unit Discount** field on corresponding line item.The Line Item Discount pop up window will display.
- Dollar Discount: **Type Dollar Amount** in to \$ field. Touch/Click **OK**.
- Percentage Discount: **Type Percentage Amount** in \$ field. Touch/Click Dollar Amount **Drop Down Arrow**. Touch/Click **Percentage**. Touch/Click **OK**.
- Promotional Discount: Touch/Click **Promo Drop Down Arrow**. Touch/Click desired **Promotion Type**. Touch/Click **OK**.
- Quantity can be changed on the line item, by **Clicking into the Quantity Field**, **Backspacing Original Quantity** number and **Typing New Quantity** number. **Tab** out of the field.



The screenshot shows a dialog box titled "Line Item Discount". It has a text input field containing "15.00" and a dropdown menu set to "Dollar Amount". Below this is a "Promotion:" label and a dropdown menu set to "No Promo Select". At the bottom right is an "OK" button.

Dollar Amount Discount



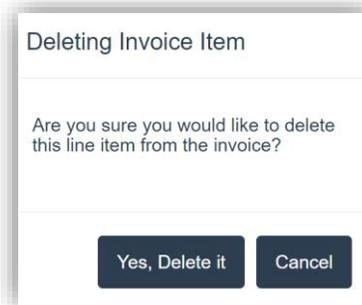
The screenshot shows a dialog box titled "Line Item Discount". It has a text input field containing "10" and a dropdown menu set to "Percentage". Below this is a "Promotion:" label and a dropdown menu set to "Summer Sale". At the bottom right is an "OK" button.

Promo Discount

• **Custom Frame Workorder:**

- Touch/Click the **Edit** icon on the custom frame workorder line item. You will return to the workorder screen.
- To Edit Description or Image Size: Touch/Click into **Field to Change Data**. To edit Moulding or Mats; Touch/Click the **Moulding/Mat Field Drop Down Arrow** and **Select the Option** needed to complete edit. To edit Art Condition/Type: Glazing and Labor Types, Touch **Click Selection to Select/De-select**. Complete necessary changes. Touch/Click the **Update Invoice** button located at the bottom of the Totals column, and to the left of the Clear button to save changes. You now will be returned to the Invoice window.
- Quantity can be changed on the line item, by **Clicking into the Quantity Field, Backspacing Original Quantity** number and **Typing New Quantity** number. **Tab** out of the field.

- c. **Delete line:** Touch/Click **Delete** icon  on the line item you would like to delete. Will receive an alert for this action. **Are you sure you would like to delete this line item from the invoice?** Touch/Click **Yes** or **Cancel**.



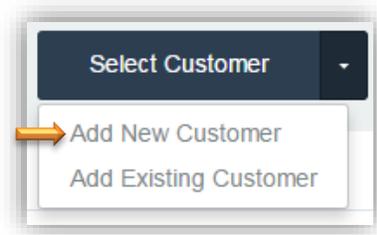
Invoice Not Saved ☑ Tax Exempt? 🔗 Customer:

No.	Qty	SKU	Description	Unit Price	Unit Discount	Subtotal	Extended	Tax Exempt	
1	<input type="text" value="1"/>	Custom Frame	Confetti Bouquet II	\$1,243.05	\$105.55	\$1,243.05	\$1,137.50	<input checked="" type="checkbox"/>	
2	<input type="text" value="1"/>	B1234	Aqua Blue Ready Made Frame 8x10	\$25.00	<input type="text" value="\$0.00"/>	\$25.00	\$25.00	<input checked="" type="checkbox"/>	
3	<input type="text" value="1"/>	<input type="text"/>	Shipping Fee	\$20.00	<input type="text" value="\$0.00"/>	\$20.00	\$20.00	<input checked="" type="checkbox"/>	
							Total Unit Price	\$1,288.05	
							Total Discount	\$105.55	
							Subtotal	\$1,182.50	
							Total Tax	\$0.00	
							Grand Total	\$1,182.50	

Add Work Order - Add Item Select Customer - Save

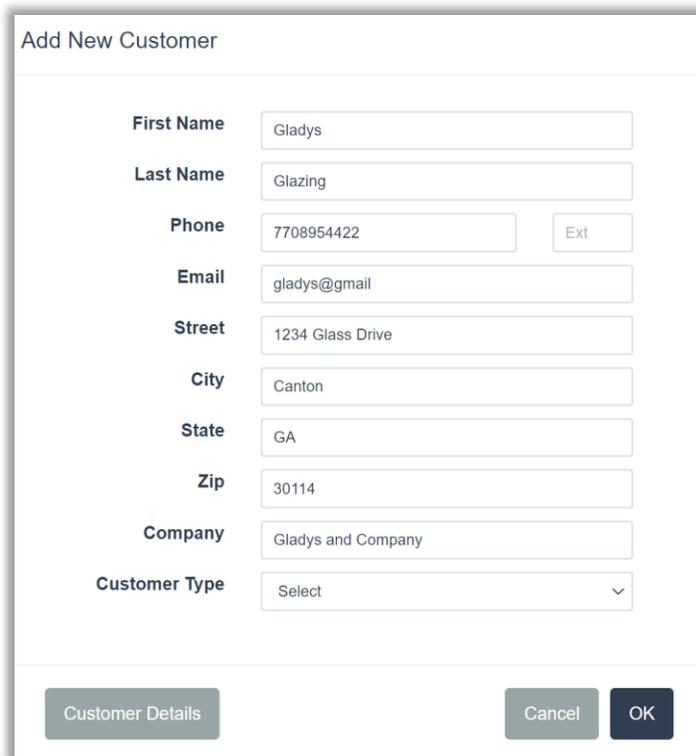
Invoice Window Options – Tax Exempt – Unit Discount - Edit/Delete Line Item

6. Touch/Click **Select Customer** button's drop down arrow. Options available are **Add New Customer** or **Add Existing Customer**.



Select Customer Drop Down Menu

7. New Customers: Touch/Click **Add New Customer**: Click/Touch fields to type **First, Last Name, Phone, Email, Street, City, State, Zip, and Company**. Select **Customer Type** in the drop-down list: Corporate, Interior Decorator, Artist or Vendor. Touch/Click **OK**.
- **Note:** Additional customer information can be added or edited in the customer's profile under the **Customer Database** button at any time.



Add New Customer Window

Note: You will receive an alert if the new customer profile you entered fully or partially duplicates an existing customer in your program. Touch/Click **Select** if the profile is the **Current/Same Customer**. If the customer profile does not match. Touch/Click **No, I would like to add a New Customer!**

Possible Duplicate Customer(s) found

The following customers were found to have similar records. Would you like to use one of these as the customer?

First	Last	Phone	Cell	Work	Street	City	State
Betty	Bevel	4047854512			1234 Bevel Blvd	Holly Springs	GA

Duplicate Customer Alert

8. Existing Customers: Touch/Click **Add Existing Customer**. Touch/Click on **Name** and or **Phone Number** field. Type First/Last Name or Phone Number. Touch/Click **Search**. A list of customer(s) will populate that match the search criteria entered.
 - a. Touch/Click the **Select** button on the desired line item. **Demo Example Search: Name: Frame.**

Select customer

First Name	Last Name	Phone	Email	Street	City	State
Fanny	Frame	456-789-1234		2500 Lake Cook Rd	Deerfield	IL
Fred	Framer	8171257894		1234 Frame Lane	Ft Worth	TX

Page: 1

Select and Search for Existing Customer

b. Touch/Click the **View Details** button to verify/view/edit customers profile details. Touch/Click appropriate field to **Add or Edit Data**. Touch/Click **OK** button.

Note: An existing customer's profile could contain a default discount and tax id. If so, the Tax ID field will be selected, and the default discount will be applied per line item in the invoice window.

Customer Expanded View

First Name <input type="text" value="Fanny"/>	Last Name <input type="text" value="Frame"/>
Street <input type="text" value="2500 Lake Cook Rd"/>	Street Con't <input type="text"/>
City <input type="text" value="Deerfield"/>	State <input type="text" value="IL"/>
Zip <input type="text" value="60015"/>	Country <input type="text"/>
Phone <input type="text" value="456-789-1234"/>	Work Phone <input type="text"/>
Cell Phone <input type="text"/>	Fax <input type="text"/>
Email <input type="text"/>	Discount <input type="text" value="0"/>
Notes <input type="text"/>	Alert Text <input type="text"/>
Business <input type="text"/>	Business Street <input type="text"/>
Business Street Con't <input type="text"/>	Business City <input type="text"/>
Business State <input type="text"/>	Business Zip <input type="text"/>
Business Country <input type="text"/>	Tax Id <input type="text"/>

View/Edit Customer Profile

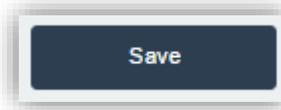
Note: Customer's name is now displayed in upper right corner in the Invoice Window.

Invoice Not Saved Tax Exempt? Customer: Gladys Glazing

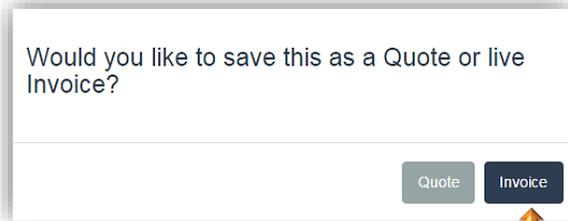
No.	Qty	SKU	Description	Unit Price	Unit Discount	Subtotal	Extended	Tax Exempt	
1	<input type="text" value="1"/>	Custom Frame	Confetti Bouquet II	\$1,243.05	\$105.55	\$1,243.05	\$1,137.50	<input type="checkbox"/>	
2	<input type="text" value="1"/>	B1234	Aqua Blue Ready Made Frame 8x10	\$25.00	<input type="text" value="\$0.00"/>	\$25.00	\$25.00	<input type="checkbox"/>	
3	<input type="text" value="1"/>	<input type="text"/>	<input type="text" value="Shipping Fee"/>	<input type="text" value="\$20.00"/>	<input type="text" value="\$0.00"/>	\$20.00	\$20.00	<input type="checkbox"/>	
							Total Unit Price	\$1,288.05	
							Total Discount	\$105.55	
							Subtotal	\$1,182.50	
							Total Tax	\$82.78	
							Grand Total	\$1,265.28	

Invoice Window

9. Touch/Click on the **Save** button to retain the workorder/invoice.



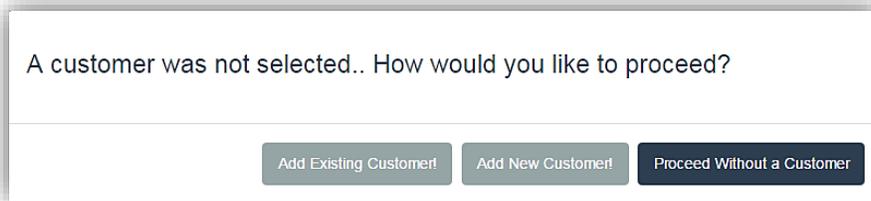
10. The following popup window will appear. Would you like to save this as a Quote or live invoice?



Save the Invoice

- a. Touch/Click the **Quote button to Save/Hold the Invoice and Print the Quote.**
- b. Touch/Click **Invoice to proceed to the Accept Payment screen.**
- c. **Demo Example Workorder:** Touch/Click the **Invoice button.**

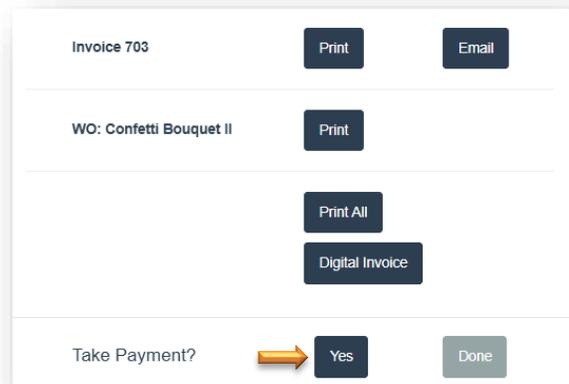
- **Note:** If you Touch/Click the **Quote or Invoice** button, without Selecting/Adding the Customer, you will receive the following popup window. Touch/Click one of the following option buttons.
 - **Add Existing Customer:** The Select/Search Customer window will display.
 - **Add New Customer:** The Add New Customer Window will display.
 - **Proceed without Customer:** The Would you like to take payment on this order prompt will display.



Add/Select Customer Prompt

11. The following popup window will appear with the following options.

- a. **Print or Email Invoice.** Invoice will show a full balance due since payment has not been received. It is best to print/email/text invoice after payment is taken.
- b. **Print Workorder.**
- c. **Print All.**
- d. **Digital Invoice:** Text invoice. *Marketing Assistant add-on necessary.
- e. **Take Payment. Yes or Done.** Select **Yes.**



Print Forms & Take Payment

Accept Payment

The Accept Payment screen will display the customers name and their current/past invoice details and payment history. Payment can be made on current, some or all invoices. Each invoice line item will be broken into the following categories.

- a. **Invoice #**
- b. **Subtotal:** Before Tax
- c. **Tax**
- d. **Discount:** Discount amount applied to the invoice.
- e. **Total:** Total amount due for entire invoice.
- f. **Payments Made:** Total amount of payments that have been applied to the invoice.
- g. **Balance Due:** Current amount due on the invoice.
- h. **Missing Payments:** Missing credit card payments.

Note: Will not display invoices with a zero balance due.

Accept Payment

Customer: Gladys Glazing

Invoice # ▼	Subtotal	Tax	Discount	Total	Payments Made	Balance	Pending Payment	
703	\$1,182.50	\$82.78	\$105.55	\$1,265.28	\$0.00	\$1,265.28	<input type="text" value="0"/>	Details Pay All Pay Half

Outstanding Balance (All Invoices) \$1,265.28

[Print Forms](#) [Other -](#) [Cash](#) [Check](#) [Card -](#) [Apply Payment\(s\)](#)

[Missing Payments](#)

Accept Payment

i. **Pending Payment Field Options:**

- Enter amount to be applied to the invoice

- **Details Button:** Option to apply the payment to individual line items within an invoice.

Description	Price
Product - Aqua Blue Ready Made Frame 8x10	\$26.75
Confetti Bouquet II - Work Order: 529	\$930.74
Manual Entry -	\$21.40

Invoice Details

- **Pay All Button:** Touch/Click to Apply Full Amount due.
- **Pay Half Button:** Touch/Click to Apply Half the Amount due.
- **Outstanding Balance:** Amount due for all of the customer's invoices.

12. Touch/Click on the **Pending Payment** Field on the invoice line item that you would like to apply payment. The current workorder/invoice is located on the 1st line. Invoice #703.

13. Additional payments can be applied if the customer has multiple invoices with balance dues.

Workorder Demo Example: Cash

- Type in **Payment Amount Received**.
Note: If the customer is paying on multiple invoices: Touch/Click the Pending Payment field on the next line item that you would like to apply payment.
- Click/Touch **Payment Type** button: Cash.
Note: If the payment type is cash and the amount received from the customer exceeds the total payment due, enter the exact amount received into the pending payment field, to display the amount of cash due back to the customer on the screen.
- The line item in orange font to the right of the Remove button will display the Invoice number(s), payment type received, date and payment amount.
- **Note:** There is the opportunity to Touch/Click the **Remove** button if the wrong tender type was selected. If selected, the pending payment amount must be entered, and a tender type selected again.
- Touch/Click **Apply Payment(s)** button.
- **Note:** The **Pay All** button could have been alternatively selected for this invoice.

Accept Payment

Customer: Gladys Glazing

Invoice # ▼	Subtotal	Tax	Discount	Total	Payments Made	Balance	Pending Payment	
703	\$1,182.50	\$82.78	\$105.55	\$1,265.28	\$0.00	\$1,265.28	1265.28	Details Pay All Pay Half

Outstanding Balance (All Invoices) \$0.00

Pending Payments

1	Invoice(s): 703	Cash	2/18/2025	\$1,265.28	*
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[Remove](#)

Print Forms

Other ▼

Cash

Check

Card ▼

Apply Payment(s)

Missing Payments

Accept Payment

- **Note:** On existing customers any invoices with outstanding balances will display in the table below the current invoice and payment history will display bottom center screen.

Accept Payment

Customer: Betty Bevel

Invoice #	Subtotal	Tax	Discount	Total	Payments Made	Balance	Pending Payment	
Invoice 134	\$612.53	\$42.06	\$63.06	\$654.59	\$0.00	\$654.59	0	Details
Invoice 133	\$594.07	\$41.59	\$0.00	\$635.66	\$0.00	\$635.66	0	Details
Invoice 124	\$353.09	\$24.72	\$0.00	\$377.81	\$150.00	\$227.81	0	Details

Outstanding Balance (All Invoices) \$1518.06

Print Forms

Other ▼

Cash

Check

Card ▼

Apply Payment(s)

Payment History

Refund	1	Invoice(s): 124	Cash	4/27/2016	\$100.00	✓
Refund	2	Invoice(s): 124	Cash	4/27/2016	\$50.00	✓

Multiple Balance Due Invoices

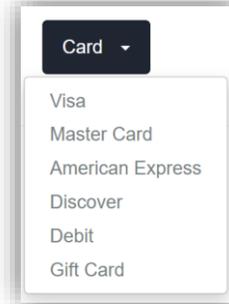
Menu Options:

- **Print Forms:** Print Invoice and Workorder Copies

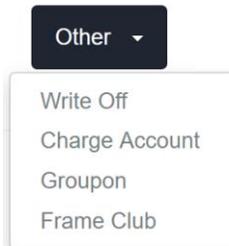
Payment Types:

- **Cash**
- **Check**

- **Credit/Debit Card:** Visa, MasterCard, American Express & Discover.
- **Debit Card**
- **Gift Card:** Redeem your store issued Gift Card with integrated processing and Paya Payment Solutions.



- **Write Off:** 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.
- **Charge Account:** In-house charge accounts.
- **Groupon/Frame Club:** Option must be selected under the Settings tab in the Store Configuration Menu. Enter Coupon/Rewards amount as payment.



h. **Apply Payment(s):** Process payment and complete the invoice/workorder.

Accept Payment Customer: Gladys Glazing

Invoice # ▼	Subtotal	Tax	Discount	Total	Payments Made	Balance	Pending Payment			
703	\$1,182.50	\$82.78	\$105.55	\$1,265.28	\$0.00	\$1,265.28	1265.28	Details	Pay All	Pay Half

Outstanding Balance (All Invoices) \$0.00

Pending Payments

Remove
1
Invoice(s):703
Cash
2/18/2025
\$1,265.28 *

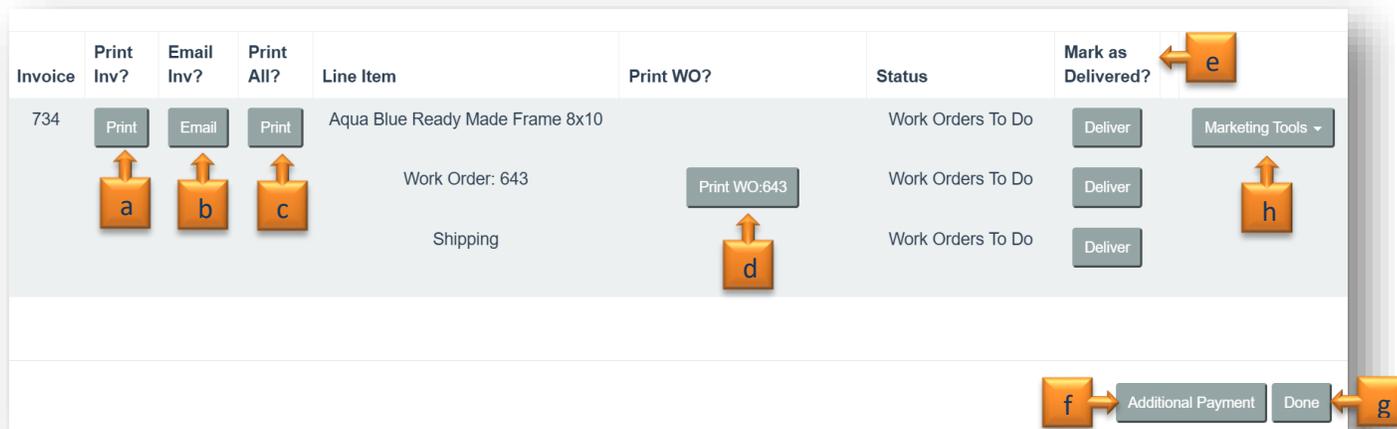
Print Forms
Other ▼
Cash
Check
Card ▼
Apply Payment(s)

Missing Payments

Accept and Apply Cash Payment

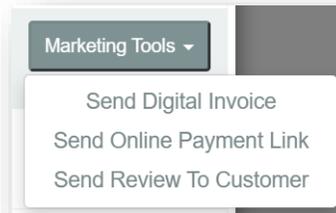
14. Print Options & Marketing Window.

- a. **Print Inv?**: Touch/Click the **Print** button under **Print Inv?** heading to only print the invoice form.
- b. **Email Inv?**: Email invoice. *See Email Invoice instructions.*
- c. **Print All?**: Touch/Click the **Print** button under the **Print All?** Heading to print both the invoice and workorder forms. **Tip:** *This button will be your default button to click/touch to print both at once.*
- d. **Print WO?**: Touch/Click the **Print Workorder #** button to only print the workorder.
- e. **Mark as Delivered?**: Touch/Click the Delivered button on the desired line item. Delivered indicates that the customer is leaving with that item. Items that are not paid in full cannot be marked as delivered. Inventory and Manual Entry Items will default to deliver status.
Note: *See New Production Section for full production status instructions.*
- f. **Additional Payment:** Touch/Click to split payment. *See Split Payment instructions.*
- g. **Done:** Touch/Click the **Done** button when you have completed printing forms and updating the status.
- h. **Marketing Tools:** *Marketing Package Add-On is necessary.*



Print Forms & Marketing Tools

h. **Marketing Tools: Marketing Package Add-On is necessary.**



Send Digital Receipt (Beta)

Select the phone or email to send the digital receipt.

Cell:

Email:

Phone/Email:

Send Digital Receipt

- Select the phone or email to send the digital receipt
- Touch/Click the **Send** button on the corresponding line item.
- Touch/Click **Done**.

Send Customer Link To Pay Invoice

Select the phone or email to send the customer a link to by their invoice online

Cell:

Email:

Phone/Email:

Send Customer Link To Pay Invoice

- Select the phone or email to send the customer a link to purchase their invoice online.
- Touch/Click **Send** on the corresponding line item.
- Touch/Click **Done**.

Send Customer Review Request

Select the phone or email to send the customer a link to review your store.

Cell:

Email:

Phone/Email:

Send Customer Review Request

- Select the phone or email to send the customer a link to review your store.
- Touch/Click **Send** on the corresponding line item.
- Touch/Click **Done**.

15. Touch/Click **Email** button in the Print Forms window to email invoice.Touch/Click **Send**.

Send Email

Customer's Email:

Subject:

Dear Gladys,

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

Regards,,
Training Gallery

Copy Store on Email

* Additional email settings can be found under Store Information tab in Store Configuration.

16. **Demo Example:** Touch/Click the **Print** button under the **Print All?** Heading.

Note: If **Require all orders on an invoice to be delivered together** setting is selected in the Configure menu, the **Deliver All** button will display in the Print Options window.

Invoice	Print Inv?	Email Inv?	Print All?	Line Item	Print WO?	Status	Mark as Delivered?	
736	<input type="button" value="Print"/>	<input type="button" value="Email"/>	<input type="button" value="Print"/> 	Aqua Blue Ready Made Frame 8x10		Work Orders To Do	<input type="button" value="Deliver"/>	<input type="button" value="Marketing Tools"/>
				Work Order: 644	<input type="button" value="Print WO:644"/>	Work Orders To Do	<input type="button" value="Deliver"/>	
				Shipping		Work Orders To Do	<input type="button" value="Deliver"/>	

17. **Invoice & Workorder Print Preview** will display: The following Options are available.

Tip: Scroll down in the print preview window to view workorder form. (Options and Display will vary across devices and internet browsers.)

- **Destination:** Ensure that your printer is listed. If not touch/click Change button to select new printer.
- **Pages:** All is the default. Enter page range in the field below the heading All to print the desired pages. (Page 1 invoice or Page 2 workorder)
- **Copies:** Default is 1. (1 invoice and 1 workorder form) Touch/Click into field backspace 1 to remove. Type new new number of copies needed.
- **Color:** Default is Black/White. Touch/Click drop down arrow. Touch/Click Color to select color copies. *Demo Example reflects Color copies.*
- **Scale:** Default is Fit to Page.
- **Options:** Touch/Click 2 Sided if you would like to print the invoice and workorder doublesided if either continue to a 2nd page.

Tip: Save the Invoice to a PDF: Touch/Click the *Change button located under the Destination/Printer Name – Touch/Click Save as PDF in the destination listing – Touch/Click the Save button – Type document title name – Click on the Save button. This will skip the print option in this window, but you will have another opportunity to print later in the process. (Options and Display will vary across devices and internet browsers.)

*The Destination will have to be changed back to your printer name the next time you are back in the printer window in order to print your next invoice/workorder.

18. Touch/Click the **Print** button. Both the invoice and workorder forms will print.

Invoice #
703

Revision: 1

Gladys and Company
Gladys Glazing

1234 Glass Drive
Canton, GA 30114
gladys@gmail
Home: 770-895-4422



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

Order Date: 2/18/2025	Salesperson: tiffanytrainee
Last Revised: 2/18/2025	Balance Due: \$0.00

Description	Quantity	Price	Discount	Total
Aqua Blue Ready Made Frame 8x10 [B1234]	1	\$25.00	\$0.00	\$25.00
Shipping Fee	1	\$20.00	\$0.00	\$20.00
Work Order 625: Confetti Bouquet II Due: 3/4/2025	1	\$1243.05	\$105.55	\$1137.50
Total Unit Price				\$1288.05
Total Discount				\$105.55
Subtotal				\$1182.50
Tax				\$82.78
Total				\$1265.28

Payments

Date	Type	Method	Amount
2/18/2025	Payment	Cash	\$1265.28
Total			\$1265.28

Balance Due: \$0.00

Disclaimer Verbage

Signature X _____

2/18/2025 2:08:59 PM - Page 1

Print 1 sheet of paper

Destination HPBEE50D (HP ENVY Ink)

Pages All

Copies 1

Color Color

More settings ▼




Print Preview Window - Invoice

Note: Touch/Click and **Drag Scroll Bar** downward to view **Workorder Copy** that is located below the invoice copy in the print preview window.

Gladys and Company - Gladys **Work Order** w/o: 625 Rev: 1 Inv: 703
 1234 Glass Drive Training Gallery
 Canton, GA 30114

Order Date: 2/18/2025 Phone: (770) 895-4422
 Due Date: 3/4/2025 Tuesday Qty: 1 Work:
 Confetti Bouquet II Email: gladys@gmail
 Invoice Total: \$1265.28 Invoice Balance: \$0.00 Art Loc: Designer: tiffanytrainee

Opening Size: 20 x 20 (Inches)
 Length: Vert: Horiz: Size: 29 1/2 x 29 1/2

Feet-Width	Bin #	Vendor #	Description	Order	Cut
Midg 1: 12.0-2 11/16		L569240	Lancaster Covered Bridge Grey 2 3/4		

Glass: Museum Glass® Mounting: AcidFree

Mat 1	Mat 2	Mat 3	Fillet 4	Mat / Fillet 5	Mat / Fillet 6	Mat / Fillet 7
C9503 White HotSelect	C9889 Deep BlueSelect	C9546 Blue SatinSelect	L100750 Sofia Fillet Bronze 1/4			
T: 4 B: 4 L: 4 R: 4 Reveal → Bin:	T: 4 1/4 B: 4 1/4 L: 4 1/4 R: 4 1/4 1/4 Bin:	T: 4 1/2 B: 4 1/2 L: 4 1/2 R: 4 1/2 1/4 Bin:	Len: 7.0 T: 4 3/4 B: 4 3/4 L: 4 3/4 R: 4 3/4 1/4 Bin:	T: B: L: R:	T: B: L: R:	T: B: L: R:

Specials: Engraving, Rev Bev
 Art Condition: Good / No Damage Special Instructions below (over for drawings)

Gladys and Company - Gladys Glazing		Size: 29 1/2 X 29 1/2	mid. 1	L569240	mid. 2
WOR: 625		Mat / Fillets	12.0 bin		bin
Due Date: 3/4/2025	Phone: (770) 895-4422	#1 C9503 #5	mid. 3		mid. 4
Tuesday	Work:	#2 C9889 #6	bin		bin
		#3 C9546 #7	Museum Glass®		mid. 5
		#4 L100750 #8	AcidFree		bin

2/18/2025 2:10:21 PM - Page 1

Print 2 sheets of paper

Destination: HPBEE50D (HP ENVY In) ▾

Pages: All ▾

Copies: 1

Color: Color ▾

More settings ▾

Print Cancel

Print Preview Window - Workorder Page 1- Workorder Format #2 - To Select Format #1 Go To: Configure - Printing

Gladys and Company - Gladys **Work Order** w/o: 625 Rev: 1 Inv: 703
 1234 Glass Drive Training Gallery
 Canton, GA 30114

Item Notes
 C9546 Reverse Bevel

2/18/2025 2:10:21 PM - Page 2

Print 2 sheets of paper

Destination: HPBEE50D (HP ENVY In) ▾

Pages: All ▾

Copies: 1

Color: Color ▾

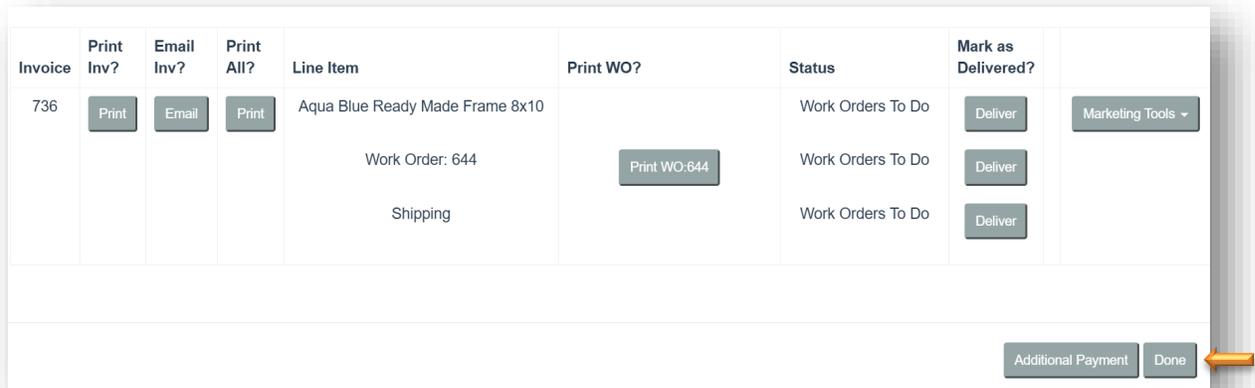
More settings ▾

Print Cancel

Print Preview Window - Workorder Page 2- Workorder Format #2 - To Select Format #1 Go To: Configure - Printing

Note: The custom designed image will display on the workorder and invoice if FrameVue is activated. Refer to the FrameVue User Guide for instructions.

19. After the print begins the program will return to the Print Forms window. This gives you the opportunity to print again in case there are any print errors. Touch/Click the **Done** button, if you are finished printing, emailing or texting the forms. The workorder/invoice is complete and you will be returned to the Home screen.

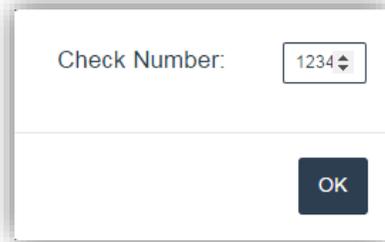


Invoice	Print Inv?	Email Inv?	Print All?	Line Item	Print WO?	Status	Mark as Delivered?	
736	<input type="button" value="Print"/>	<input type="button" value="Email"/>	<input type="button" value="Print"/>	Aqua Blue Ready Made Frame 8x10 Work Order: 644 Shipping	<input type="button" value="Print WO:644"/>	Work Orders To Do Work Orders To Do Work Orders To Do	<input type="button" value="Deliver"/> <input type="button" value="Deliver"/> <input type="button" value="Deliver"/>	<input type="button" value="Marketing Tools"/>

Print, Email or Text Forms Window

1. **Check**

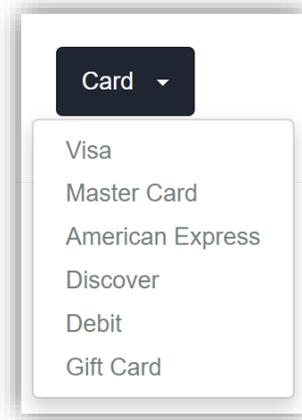
- Type payment amount into Pending Payment Field(s).
- Touch/Click the **Check** button.
- Touch/Click the **Check Number** field in the pop-up window. Enter check number. Touch/Click **OK**.
- Touch/Click Apply Payment



A screenshot of a mobile application interface showing a 'Check Number' input field. The field contains the number '1234' and has a small downward arrow on the right side. Below the input field is a dark blue button with the text 'OK' in white.

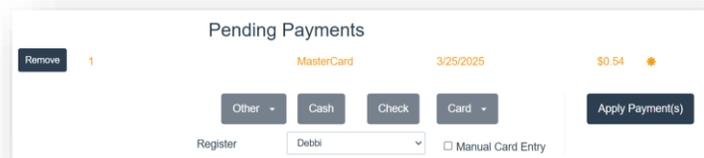
2. **Credit/Debit/Mobile Payment with LifeSaver Payments Integration**
(Visa, MC, American Express and Discover)

- Type payment amount into Pending Payment Field(s).
- Touch/Click the **Card** button.
- Touch/Click the **Card Type** in drop down menu.
- **Note:** Any charge type can be selected for mobile payment. Gift cards are no longer active.



A screenshot of a mobile application interface showing a 'Card' dropdown menu. The menu is open, displaying a list of card types: Visa, Master Card, American Express, Discover, Debit, and Gift Card. The 'Card' button is dark blue with a white downward arrow.

- Touch/Click **Apply Payment**

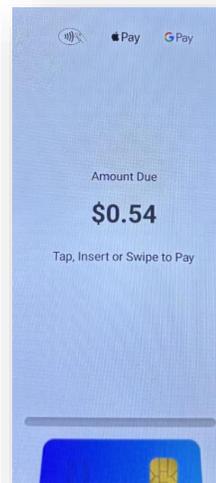


A screenshot of the 'Pending Payments' screen in a mobile application. At the top, it says 'Pending Payments'. Below that, there is a 'Remove' button with a '1' next to it. The payment details are: 'MasterCard', '3/25/2025', and '\$0.54'. There are four buttons: 'Other', 'Cash', 'Check', and 'Card'. Below these buttons, there is a 'Register' label, a dropdown menu showing 'Debit', and a checkbox for 'Manual Card Entry'. On the right side, there is a dark blue button labeled 'Apply Payment(s)'.

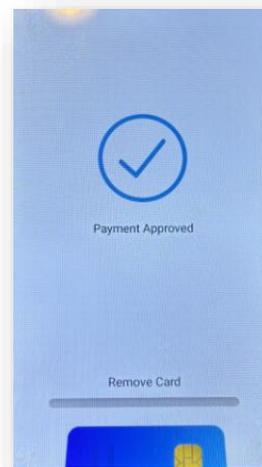
- P5 Credit Card Terminal.
Note: Terminal models may differ.



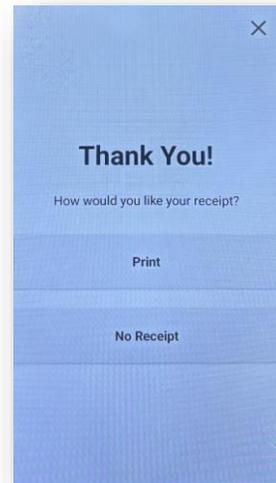
- The P5 credit card terminal screen will show the **Amount Due** and will instruct the customer to **Tap, Insert or Swipe to Pay**.



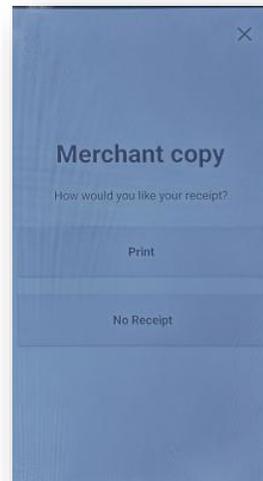
- Payment has been approved.
Remove Card.



- Thank You! How would you like your receipt? Customer will touch **Print or No receipt**.

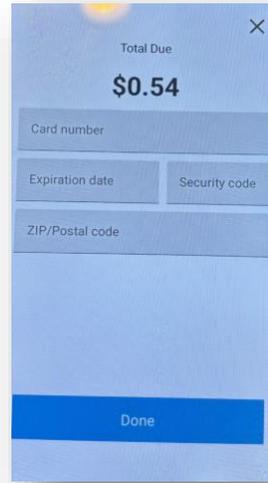


- The Merchant will then get the opportunity to print a receipt for their records. **Touch Print or No Receipt.**



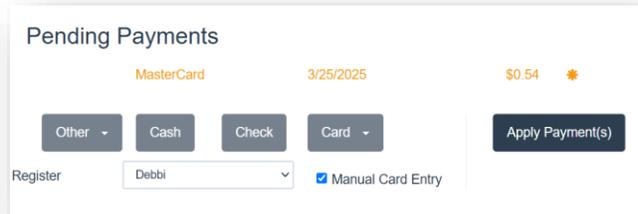
- If the card is approved the Print Invoice/Workorder window will display. If the card shows as declined on the P5 screen. Request another form of payment.

- If the customer's credit card will not process with a tap, swipe or inserting his card they will need to enter their card manually.



- **Manual Card Entry**

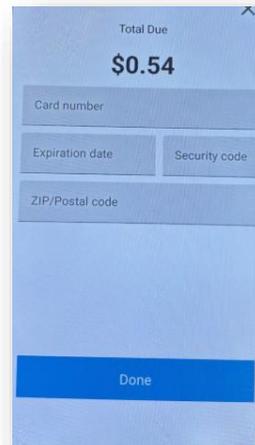
- Touch/Click **Manual Card Entry** field under the Credit Card button to select.
- Touch/Click **Apply Payment** button.



- The customer will need to manually input his credit card information.

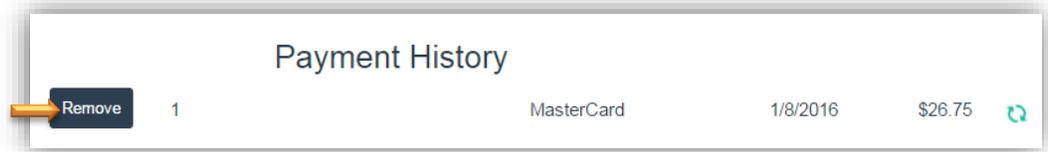
Note: A keypad number will display on the P5 when the customer touches the Card Number field.

- Type Credit Card Number
- Type Expiration Date Type
- Security Code
- Type Zip Code
- Touch Done



3. Declined Payments

- Touch/Click the Remove button to delete the declined payment.



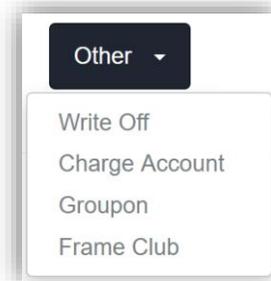
Remove Declined CC Payment

4. Process Without Credit Card Authorization.

- To Process Credit Card without Integration: Select Card – Select Card Type – Select Apply Payment.

5. Other Payments

- Touch/Click the **Other** button on the Accept Payment Screen to access the below form of payments.



- 6. **Write Off:** *Option to write off an invoice with a balance due. The invoice will no longer be shown in receivables, and the invoice deposit will then become the total sale. amount.*

- Type payment **Amount** into Pending Payment Field(s).
- Touch/Click **Other** button.
- Touch/Click **Write Off**.
- Touch/Click **Apply Payment** button.

7. **Charge Account:** *In house charge account.*

- Type payment **Amount** into Pending Payment Field(s).
- Touch/Click **Other** button.
- Touch/Click **Charge Account**.
- Touch/Click **Apply Payment** button.

8. **Groupon/Frame Club:** Enter Coupon/Rewards amount as payment.

- Type **Groupon/Frame Club Amount** into the pending payment field.
- If the Groupon/Frame Club amount **Exceeds** the invoice total, you have two options.
 - First Option: Type the **Groupon/Frame Club Amount** into the **Pending Payment** field and the program will auto default to Cash back. Touch/Click **Apply Payment** button.
 - Second Option: Touch/Click the **Pay All** button on the corresponding invoice line item. Touch/Click **Apply Payment** button.
- If the Groupon/Frame Club **Amount is Less Than** the full invoice amount it will be necessary to split payments.
 - Type **Groupon/Frame Club Amount** into the corresponding invoice line item **Pending Payment** field.
 - Touch/Click the **Other** Button.
 - Touch/Click **Groupon or Frame Club**.
 - Touch/Click **Apply Payment** button.
 - Touch/Click the **Additional Payment** button located bottom left in the Print Invoice/Workorder window.
 - Type the Amount of the 2nd form of payment in the **Pending Payment** field on the corresponding invoice line item.
 - Touch/Click **Payment Type**.
 - Touch/Click **Apply Payment** button.

Note: *For Detailed Split Payment Instructions see next section.*

9. **Split Tender Payment:** Take 2 or more payment types on one invoice.

Demo Example: Cash: \$100.00 & Check: \$140.75 (Invoice Balance)

- Touch/Click **Pending Payment** field. Type **Cash** Amount of **\$100.00**.
- Touch/Click **Payment Type** button. *Demo Example: Cash*

- Touch/Click **Apply Payment** button.
- Touch/Click the **Additional Payment** button in the Print Invoice/Workorder pop up window.

- Touch/Click **Pending Payment** field on the invoice line item. Type the amount of the balance due. **Demo Example: \$140.75.**

Accept Payment Customer: Pat Painting

Invoice #	Subtotal	Tax	Discount	Total	Payments Made	Balance	Pending Payment	
432	\$225.00	\$15.75	\$0.00	\$240.75	\$100.00	\$140.75	140.75	<input type="button" value="Details"/> <input type="button" value="Pay All"/> <input type="button" value="Pay Half"/>

Outstanding Balance (All Invoices) \$0.00

Payment History

<input type="button" value="Refund"/>	1	Invoice(s):432	Cash	6/17/2019	\$100.00	<input checked="" type="checkbox"/>
---------------------------------------	---	----------------	------	-----------	----------	-------------------------------------

- Touch/Click **Payment Type** button. **Demo Example: Check**
- Type **Check #** in the field. Touch/Click **OK**.

Accept Payment Customer: Pat Painting

Invoice #	Subtotal	Tax	Discount	Total	Payments Made	Balance	Pending Payment	
432	\$225.00	\$15.75	\$0.00	\$240.75	\$100.00	\$140.75	140.75	<input type="button" value="Details"/> <input type="button" value="Pay All"/> <input type="button" value="Pay Half"/>

Outstanding Balance (All Invoices) \$0.00

Pending Payments

<input type="button" value="Remove"/>	2	Invoice(s):432	Check - 123	6/17/2019	\$140.75	<input checked="" type="checkbox"/>
---------------------------------------	---	----------------	-------------	-----------	----------	-------------------------------------

Payment History

<input type="button" value="Refund"/>	1	Invoice(s):432	Cash	6/17/2019	\$100.00	<input checked="" type="checkbox"/>
---------------------------------------	---	----------------	------	-----------	----------	-------------------------------------

- Touch/Click **Apply Payment** button.
- Print Invoice/Workorder. Payment Details will print on Invoice. See Demo Example Image below.

Payments			
Date	Type	Method	Amount
6/17/2019	Payment	Cash	\$100.00
6/17/2019	Payment	Check	\$140.75
Total			\$240.75
Balance Due:			\$0.00

Repeat Workorder

This function allows you to copy the current workorder on the screen.

1. Write up first workorder. Do not Add to Invoice.

Description: Yellow Daisy 1, Art Condition, Art Type, Due Date: 5/31/2017

Image Size: Height 20, Width 18, Finished Size: 26.5 X 24.5

Mouldings: 1: I024-500, 2:

Mats: Top 3, Bottom 3, Left 3, Right 3

Mats / Fillets / Fabrics: 1: C1000, 2: C1029, 3: , Reveal 1/4, 1/4

Conservation Clear Acrylic, Museum Glass, Conservation Reflection Control, Conservation Clear, No Glazing, Other Glazing...

Specials: 3xBoard, BlackFC, DMBlackM, Foamcore, AJFw/Art, CanvasXf, Museum, AcidFree, Crdboard, DrymtXB, X-board

Total...: Materials: Mouldings \$127.26, Glass \$200.03, Mats \$53.93, Fabric, Fillet, Mounting \$21.93, Stretching, Special, Engraving, Fitting On \$15.81, Art +, Misc +, Subtotal \$418.96, Discount +

Buttons: Add To Invoice, Clear, Repeat, Upload Image

First Workorder

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

Note: This will add the current workorder displayed to the invoice, but the invoice window does not display until the repeated workorder is added to the invoice.

3. The follow pop message will display. Do you want to clear the information for this order or keep it for your next order. Touch/Click **Keep** to repeat the current workorder on the screen.

Do you want to clear the information for this order, or keep it for you next order?

Buttons: Clear, Keep

- Adjustments can be made to the repeated order, such as; Measurements, Delete/Add/Edit Components, Specials, Workorder Notes and Description.

Demo Example: Change Description from Yellow Daisy 1 to Yellow Daisy 2 and delete 2nd mat.

- Touch/Click **Description** field, remove 1 and add 2.
- Touch/Click the drop down arrow on the 2nd mat field. Touch/Click the **Delete** option to remove.
- Touch/Click the **Add to Invoice** button to add the 2nd workorder to the invoice.
- Both workorders Yellow Daisy 1 and Yellow Daisy 2 will now display in the invoice window. The total cost difference is due to the 2nd mat being removed in the 2nd workorder.

Invoice		Not Saved		<input type="checkbox"/> Tax Exempt?			Customer:		
No.	Qty	SKU	Description	Unit Price	Unit Discount	Total Discount	Subtotal	Tax	Total
1	1	Custom Frame	Yellow Daisy 1	\$418.96	\$0.00	\$0.00	\$418.96	\$29.33	\$448.28
2	1	Custom Frame	Yellow Daisy 2	\$312.14	\$0.00	\$0.00	\$312.14	\$21.85	\$333.98
Totals				\$731.09		\$0.00	\$731.09	\$51.18	\$782.27

Add Work Order
Add Item
Select Customer
Save

Invoice Window

- Proceed with the invoice.

Payment

Process payments, refunds, edits and voids. Print, email & text Invoices. Upload mat cut files to CMC.

Make a Payment on Invoice with Balance Due

1. Click/Touch **Payment**.
2. To pull up the invoice to make payment. Search by Invoice #, Customer Name or Customer Phone.
Demo Example: Invoice 709 - Touch/Click **Search** button.

Invoice Search

714 W/O # Name / Phone / Business / Email Description Start Date End Date PO # Search

Show invoices with \$0.00 balance

Inv #	Rev	Customer	Date Created	Balance		Status	Cut Mat ID
714	1	Teddy Bear	2/28/2025	\$535.81	Pay/Refund Edit Print - Other -	Flowers - Work Orders To Do	11643491

Page: 1

Invoice Payment with Balance Due

3. The line item will display the Invoice Number, Revision Number, Customer Name, Date Created and the Balance Due. Touch/Click the **Pay** button on the invoice line item you would like to process the payment on.
Note: If the customer has multiple invoices, each invoice will display as a separate line item.
4. The Accept Payment window will display. Enter **Payment Amount** on the corresponding line item. **Demo Example:** Invoice 714. Select **Tender Type**. **Apply Payment**. **Print, Email or Text Invoice**.

Accept Payment Customer: Teddy Bear

Invoice #	Subtotal	Tax	Discount	Total	Payments Made	Balance	Pending Payment	
714	\$1,071.61	\$0.00	\$0.00	\$1,071.61	\$535.80	\$535.81	535.81	Details Pay All Pay Half
712	\$25.00	\$0.00	\$0.00	\$25.00	\$25.00	\$0.00	0	Details Pay All Pay Half
708	\$862.75	\$60.39	\$0.00	\$923.14	\$923.14	\$0.00	0	Details Pay All Pay Half
707	\$339.79	\$23.79	\$0.00	\$363.58	\$363.58	\$0.00	0	Details Pay All Pay Half
706	\$876.00	\$61.32	\$0.00	\$937.32	\$937.32	\$0.00	0	Details Pay All Pay Half

Outstanding Balance (All Invoices) \$0.00

Pending Payments

Remove 10 Invoice(s) 714 Cash 2/28/2025 \$535.81 *

Print Forms Other - Cash Check Card - Apply Payment(s)

Accept Payment - Make Payment on Balance Due

Note: All of the functions are identical under the Invoice Search button. Go to the Table of Contents to search for refund, Edit, Print, Void & Mat Cut ID instructions.

Quote

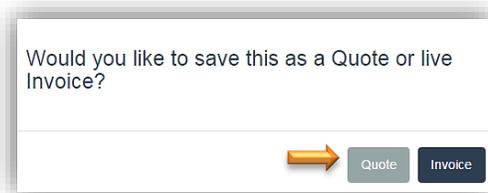
Create, print, hold, email and resume a workorder quote for a customer.

Create Quote

1. Touch/Click **Write Order**
2. Complete Workorder – Add Workorder(s) to the Invoice – Add Items to the invoice if applicable – Select/Add Customer.

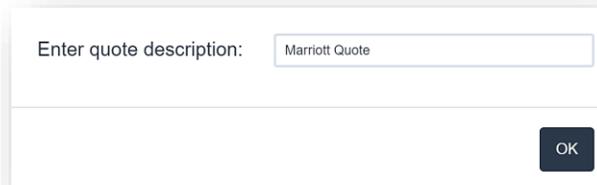
Note: Refer to Write Order for Workorder, Invoice and Select/Add Customer instructions.

3. Touch/Click **Save** button in the invoice window.
4. Touch/Click the **Quote** button.



Select Quote

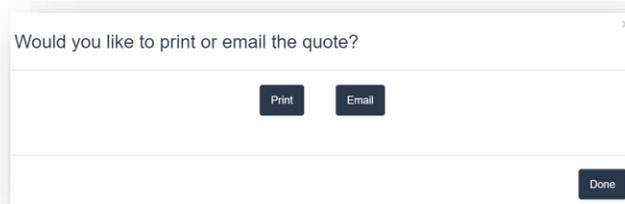
5. Type the **Quote Description** in the field. **Demo Example:**Marriott Quote
6. Touch/Click **OK** button.



Quote Description

7. The quote can be printed or emailed. Touch/Click the **Print** button. **Demo Example:** Print

Note: Touch/Click the Email button to email invoice. Instuctions listed under Email Quote section. Touch/Click the Done button to bypass printing or emailing the quote.



Quote – Print or Email

- Quote will display in the print preview window. Touch/Click **Print**. The Quote will be placed in a “Hold Status” in the program and can be resumed, emailed, printed or deleted at anytime.

Tip: The quote receipt can display the total amount of the workorder only or it can display component prices and total workorder amount. The option is available in the store configure menu under the settings tab. The default setting is to list component totals and total amount.

QUOTE		Training Gallery		1234 LifeSaver Lane Holly Springs, GA 30142	
Quote #				tristan@gmail.com	
13				770-123-5678	
Revision: 1 Sold By: tristantrainee					
Carol Customer			Order Date: 1/3/2019 4:11 PM		
1234 Customer Cove Circle Fort Worth, TX 76179 cc@gmail.com Home: 4568899			Last Revised: 1/3/2019 4:11 PM		
Description	Quantity	Price	Discount	Total	
Cloudy Sky	1	\$408.35	\$0.00	\$408.35	
Subtotal				\$408.35	
Tax				\$28.59	
Total				\$436.94	

Quote Receipt -Total Amount Only

QUOTE		Training Gallery		1234 LifeSaver Lane Holly Springs, GA 30142	
Quote #				tristan@gmail.com	
8				770-123-5678	
Revision: 1 Sold By: tristantrainee					
Fred Framer			Order Date: 10/2/2017 5:08 PM		
1234 Frame Lane Ft Worth, TX 76179 Home: 817-125-7894			Last Revised: 10/2/2017 5:08 PM		
Description	Quantity	Price	Discount	Total	
Don Mar Creations - Quote	1	\$373.49	\$0.00	\$373.49	
Glass:		\$106.28			
Mats:		\$71.84			
Moulding:		\$162.81			
Mounting:		\$18.92			
Fitting:		\$13.64			
Subtotal				\$373.49	
Tax				\$26.14	
Total				\$399.63	

Quote Receipt -Component Totals and Total Amount

Resume Quote

- Touch/Click the **Quote** button on the main menu.
- A list will display of all Quotes currently on hold. Touch/Click the **Open** button on the appropriate line item.

Note: Can use the Search field to search for the quote by number, description, name date or company name.

Quotes					
Search...					
Number	Description	Customer Name	Company	Date Created	
49	Marriott Quote	Bob Bevel		3/6/2025	<input type="button" value="Open"/> <input type="button" value="Print"/> <input type="button" value="Email"/> <input type="button" value="Delete"/> <input type="button" value="Edit"/>

Quote List

- The invoice/workorder will resume.

Note: The due will update when you resume the quote.

Email Quote

1. Touch/Click **Quote** button on main menu.
2. A list will display of all Quotes currently on hold. Touch/Click the **Email** button on the appropriate line item.

Note: Can use the Search field to search for the quote by number, description, name date or company name.

Quotes

Search...

Number	Description	Customer Name	Company	Date Created					
49	Marriott Quote	Bob Bevel		3/6/2025	Open	Print	Email	Delete	Edit

Quote - Email

3. Touch/Click Customer's Email field. Type customers **Email Address**.
4. "Copy Store on Email" is auto selected. To de-select. Touch/Click Check field if desired.
5. Current Subject: "Invoice from Your Store Name". Subject can be edited by Touching/Clicking into the subject field and backspacing/deleting current subject. Type New subject if desired.
6. Email Body:

*Dear Customer Name,
Thank you for your business. Your invoice is attached.
Regards,
Your Store Name*

The body of the email can be edited by Touching/Clicking into the email and backspacing/deleting current content. Type new email if desired.

Confirm Email

Customer's Email:

Copy Store on Email?

Subject:

Body

Dear Fred Fillet ,
Thank you for your business. Your invoice is attached.
Regards,
Training Gallery

Cancel Send

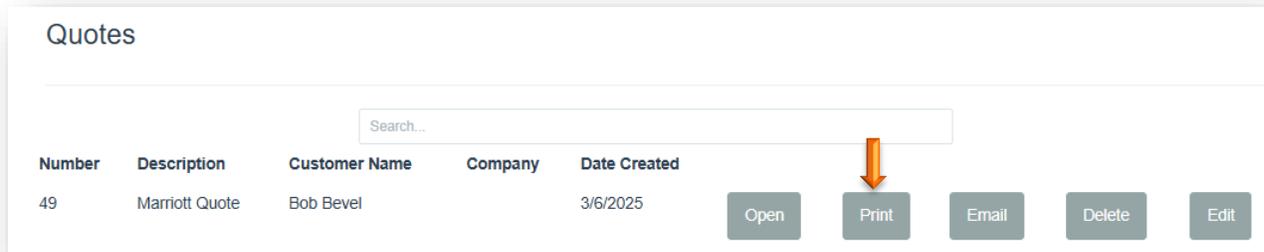
Quote - Email

7. Touch/Click **Send** button.

Print Existing Quote

1. Touch/Click **Quote** button.
2. A list will display of all Quotes currently on hold. Touch/Click the **Print** button on the appropriate line item.

Note: Can use the Search field to search for the quote by number, description, name date or company name.

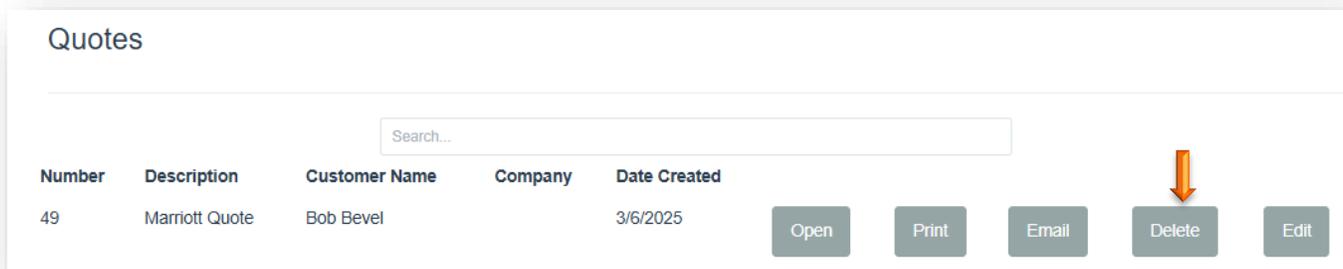


Quote - Print

3. Touch/Click the **Print** button on the print preview screen.

Delete Quote

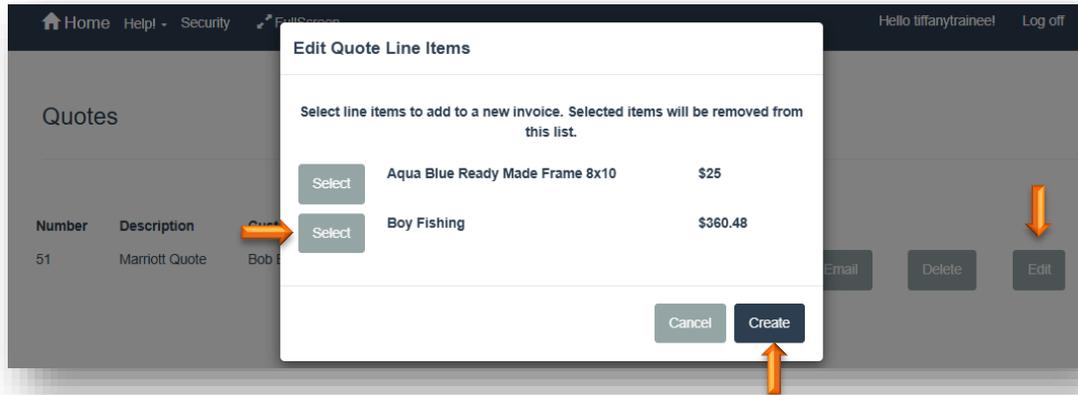
1. Touch/Click the **Quotes** button on the Main Menu.
2. Touch/Click the **Delete** button on the line item that contains the invoice number of the quote that you would like to delete.



Quote - Delete

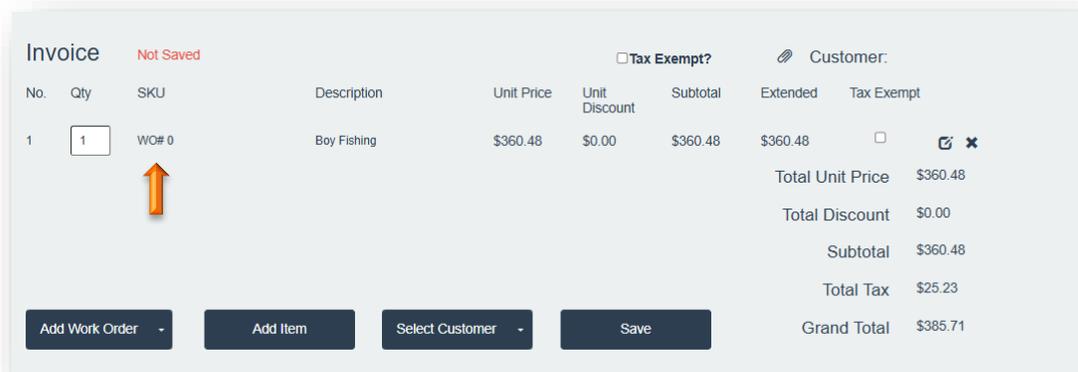
Edit Quote

1. Touch/Click the **Quotes** button on the main menu.
2. Touch/Click the **Edit** button on the corresponding line item. The Quote includes a workorder and an inventory item.
3. In the pop up window touch/click the **Select** button on the line item you would like to remove from the quote and add to a new invoice. **Demo Example:** Select workorder *Boy Fishing* to move to a new invoice.



Edit Quote

4. The workorder will be removed from the window. Touch/Click the **Create** button to move the workorder to a new invoice.



New Invoice Window

5. The new invoice window will display with the workorder/inventory items listed. The following functions are now available: Edit Line Item, Add an Additional Workorder/Item, Select/Add Customer, Save to Invoice/Quote and Accept Payment.

Note: The quote will still contain the original workorder and or inventory items.

Fit to Frame

Calculate mat borders when image size and ready-made frame sizes are known

Workorder Demo Example: Mat for a 5x7 photo in an 8x10 frame.

1. Touch/Click **Write Order**. Touch/Click **Description** field. Type workorder name. Touch/Click **Art Condition**. Touch/Click **Art Type**.
2. Enter Image Size: **5x7**

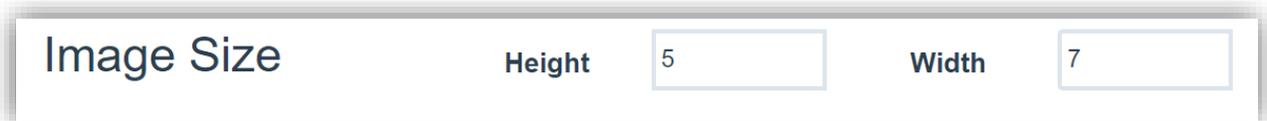


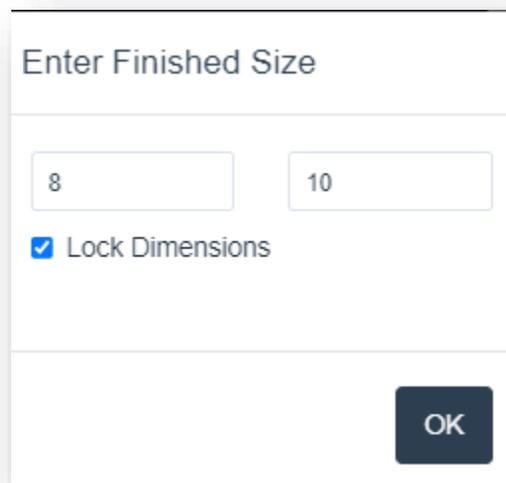
Image Size

Height	<input type="text" value="5"/>	Width	<input type="text" value="7"/>
--------	--------------------------------	-------	--------------------------------

3. Touch/Click on **Finished Size Icon**.



4. Enter Finished Size: **8x10**.
5. Touch/Click **Lock Dimensions**. Touch/Click **OK**.



Enter Finished Size

<input type="text" value="8"/>	<input type="text" value="10"/>
--------------------------------	---------------------------------

Lock Dimensions

OK

6. The **Mat Reveal** will auto fill.

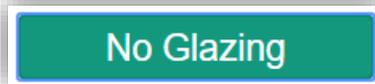
Mats Top Bottom Left Right

7. Enter **Mat Item Code(s)**.

Mats Top Bottom Left Right

Mats / Fillets / Fabrics 1:

8. Touch/Click **No Glazing**.



9. Fit to Frame Workorder Screen Image Below.

Description Art Condition Art Type Due Date: 9/28/2017

Image Size Height Width Finished Size: 8 X 10

Mouldings 1:

Mats Top Bottom Left Right

Mats / Fillets / Fabrics 1:

2: Reveal

10. Proceed with Workorder.

Copy Previous Workorder

Copy one of a customer's previous workorders

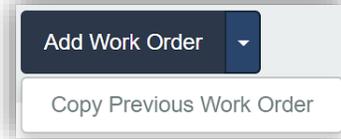
1. Touch/Click **Write Order**.

2. Touch/Click **Invoice** icon located in the blue bar above the Totals heading.



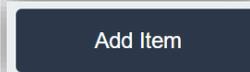
3. There are two ways to access a Previous Workorder to Copy.

a. Touch/Click the **Add Workorder Drop Down Arrow** inside the invoice window. Touch/Click **Copy Previous Workorder** button.



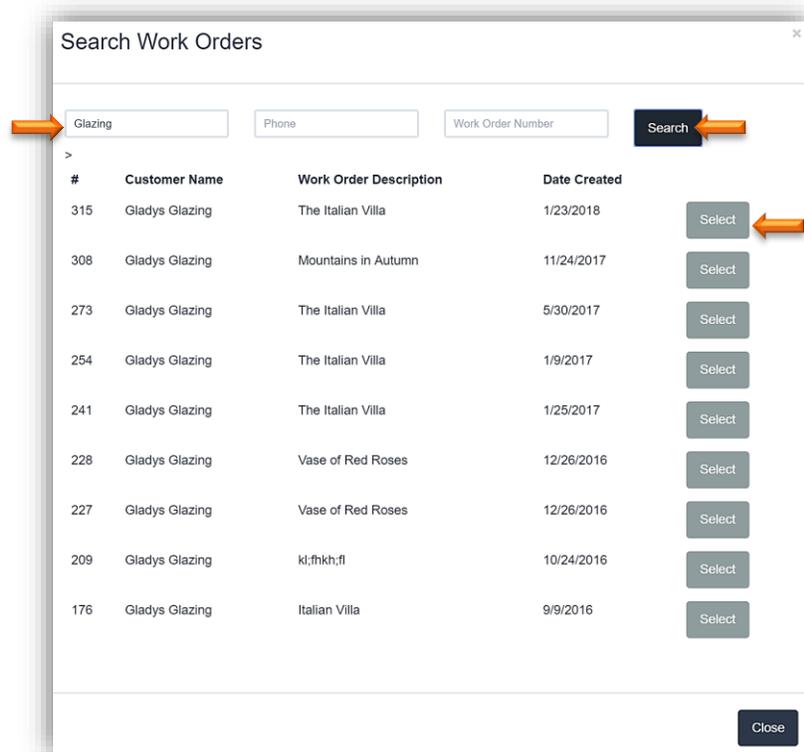
OR

b. Touch/Click the **Add Item** button in the invoice window. Touch/Click the **Previous Workorder** button in the Add Item window.



4. Search for workorder by **Name, Phone # or Workorder #**. **Demo Example: Last Name Glazing**

5. Touch/Click on **Select** button on the desired workorder. **Demo Example: Workorder 306**.



Search Workorder

6. Workorder will display on the Write Order screen.

Copied Workorder

7. Workorder Description, Art Condition/Type, Measurements, Components, Specials/Services and Discounts can be changed. See Edit Workorder/Invoice instructions in the next section.
8. Touch/Click **Add to Invoice** when you have completed the workorder entry.
9. Proceed with the workorder/invoice.

Edit Workorder/Invoice

View or complete a full or partial edit on a workorder/invoice.

1. Touch/Click **Invoice Search** on the Main Menu.
2. Touch/Click the **Invoice #, Name or Phone #, Description or Start/End Date** field and enter corresponding data to pull up the invoice. Touch/Click **Search** button.
3. Touch/Click the **Edit** button on the line item that you would like to view or edit to open the invoice/workorder. **Demo Example: Invoice #191.**

Inv #	Rev	Customer	Date Created	Balance	Status	Cut Mat ID
682	1	Sally Sales	5/19/2023	\$0.00	Flower Bouquet - Work Orders To Do	7206494

Invoice Search

4. The invoice/workorder will display on the screen with the following Editing Workorder pop up message with the following options:
 - a. Would you like to **View** the invoice and work order(s)? This option allows you to view the invoice and work order(s) but not make any changes.
 - b. Would you like to do a **Full Edit**? This option allows you to change the framing order components, measurements, add or remove items and it updates pricing accordingly.
 - c. Would you like to do a **Price Lock Edit**? This option allows you to change the framing order components, edit measurements, add/remove items, but does not update pricing.
 - d. Would you like to do a **Partial Edit**? This option allows you to update the work order comments, title, art conditions, due date and art type. This edit does not change pricing, measurements or framing order components.

View Only	Full Edit	Price Lock	Partial Edit
Would you like to view the invoice and work orders? (You can view the invoice and work orders but not make any changes)	Would you like to do a full edit? (Allows you to change framing order components, add / remove items, and updates pricing)	Would you like to do a price lock edit? (Allows you to change framing order components, add / remove items, but does not update pricing)	Would you like to do a partial edit? (Allows you to update work order comments, title, art conditions, due date, art type. This edit does not change pricing or framing order components)

Edit Workorder Options

View

1. Touch/Click the **View Only** button.
2. The invoice/workorder will display. To **View the Workorder Details**. Touch/Click the **Edit** icon on the Custom Frame workorder(s) line item to display the workorder details in the workorder screen below.

Invoice		191 (Revision 1)		<input type="checkbox"/> Tax Exempt?		Customer: Gladys Glazing				
No.	Qty	SKU	Description	Unit Price	Unit Discount	Total Discount	Subtotal	Tax	Total	
1	1	Custom Frame	The Italian Villa	\$1104.75	\$75.48	\$75.48	\$1029.28	\$72.05	\$1101.32	
2	1		Shipping Fee	20	0	\$0.00	\$20.00	\$1.40	\$21.40	
3	1	B1234	Aqua Blue Ready Made Frame 8x10	\$25.00	0	\$0.00	\$25.00	\$1.75	\$26.75	
Totals				\$1149.75		\$75.48	\$1074.27	\$75.20	\$1149.47	

Invoice 191 (Revision 1)
 Tax Exempt?
Customer: Gladys Glazing

No.	Qty	SKU	Description	Unit Price	Unit Discount	Total Discount	Subtotal	Tax	Total	
1	1	Custom Frame	The Italian Villa	\$1104.75	\$75.48	\$75.48	\$1029.28	\$72.05	\$1101.32	
2	1		Shipping Fee	20	0	\$0.00	\$20.00	\$1.40	\$21.40	
3	1	B1234	Aqua Blue Ready Made Frame 8x10	\$25.00	0	\$0.00	\$25.00	\$1.75	\$26.75	
Totals				\$1149.75		\$75.48	\$1074.27	\$75.20	\$1149.47	

Description Art Condition: Due Date: 12/26/2016

Image Size Height: Width: Finished Size: 29.25 X 27.25

Mouldings 1: - L 2: - L

Mats Top: Bottom: Left: Right:

Mats / Fillets / Fabrics

1: <input type="text" value="C1108"/> <input type="text" value="RB"/>	
2: <input type="text" value="R4921044"/> <input type="text" value="Reveal"/>	<input type="text" value="3/8"/>
3: <input type="text" value="C1032"/> <input type="text" value="Reveal"/>	<input type="text" value="1/4"/>
4: <input type="text" value=""/> <input type="text" value="Reveal"/>	<input type="text" value="1/4"/>

Conservation Clear
 Museum Glass
 Conservation
 Conservation Clear
 No Glazing

Specials

<input type="checkbox"/> 1 HrLbr	<input type="checkbox"/> 1/2HrLbr	<input type="checkbox"/> 2 HrLbr
<input type="checkbox"/> 4 HrLbr	<input type="checkbox"/> 7 HrLbr	<input type="checkbox"/> Cust Fra
<input type="checkbox"/> Cust Mat	<input type="checkbox"/> FCSpacer	<input type="checkbox"/> Fr Line
<input type="checkbox"/> Fr Tape	<input type="checkbox"/> French	<input type="checkbox"/> GlassEth
<input type="checkbox"/> GLSpacer	<input type="checkbox"/> PaintBvl	<input checked="" type="checkbox"/> Rev Bev (J)
<input type="checkbox"/> RUSH	<input type="checkbox"/> ShadowBox	<input type="checkbox"/> ShrinkWp
<input type="checkbox"/> SpcICuts	<input type="checkbox"/> TieredMt	<input type="checkbox"/> V-Groove
<input type="checkbox"/> Xtra-FIT		

Total...

Materials:

Mouldings \$282.22

Glass \$180.03

Mats \$87.43

Fabric

Fillet \$56.35

Mounting \$22.06

Stretching

Special \$12.82

Engraving

Fitting \$31.81

Art + \$350.00

Misc + \$6.56

Subtotal \$1029.28

Manager Override + \$75.48

View Invoice/Workorder

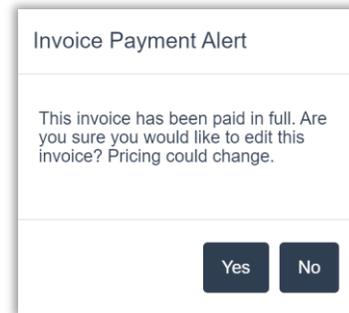
3. Touch/Click **Home to Exit**.

Full Edit

Edit/Add/Delete framing order components, measurements, discounts, and specials. When a workorder has received a full edit the workorder # will contain a revision number which represents the number of edits performed on the workorder. This edit does update pricing.

Invoice #	Revision
191	2

1. Touch/Click **Invoice Search** on the Main Menu.
2. Touch/Click the **Invoice #, Name or Phone #, Description or Start/End Date** field and enter corresponding data to pull up the invoice. Touch/Click **Search** button.
3. Touch/Click the **Edit** button on the line item that you would like to view or edit to open the invoice/workorder. **Demo Example:** Invoice #191.
4. Touch/Click the **Full Edit** button.
5. If the invoice has a zero balance you will receive the following pop-up window. *This invoice has been paid in full. Are you sure you would like to edit this invoice? Pricing could change.* Touch/Click **Yes or No**. If the edit causes the workorder to increase or decrease in the total amount, you will be taken to the payment screen to issue a refund or take additional payment. Perform an Edit with Price Lock if you do not want the workorder amount to increase or decrease.



Invoice Payment Alert

6. How to **Edit Workorder**

a. Image Size and Mat Reveals:

b. Mouldings:

- Touch/Click field
- Highlight/Backspace to **Remove Measurement**.
- Type **New measurement**.

- Touch/Click **Field Arrow** and select one of the following:
- **Edit** - to change Moulding Item Number
- **Delete** – To remove Moulding Item Number
- **Comments** – To Add or Change Moulding Notes/Instructions
- **UOM Type** - To select New UOM
- **Glazing On Layer** – To Select/De-Select.

c. **Mats:**

- Touch/Click **Field Arrow** and select one of the following:
- **Edit** - To change Mat Item Number
- **Delete** – To remove Moulding Item Number
- **Comments** – To Add/Edit Notes/Instructions
- **Standard or Reverse** – To change bevel.
- **Reveal** drop down arrow to select new reveal measurement.

d. **Glazing:**

- Touch/Click **New Glazing Type**.
- Touch/Click **Labor Type** to Select/Deselect.
- Touch/Click **Quantity** field to change.
- Highlight/Backspace to **Remove current quantity**.
- Type **New Quantity**.

e. **Specials, Mounting Stretching:**

- Add/Edit – **Add New Discount** amount
- Type or Click into field to Highlight/Backspace to **Remove Current Discount**.
- Type **New Amount/Type**.
- Touch/Click **OK**.

f. **Discount +:**

7. Touch/Click the **Update Invoice** button to save changes to the workorder.

8. How to **Edit Invoice Items**

9. Touch/Click the **Edit** icon on a Invoice line item that contains:

- a. A custom frame order to **Change Quantity** only.
- b. An inventory product to **Change/Add Discount** amount or **Quantity**.
- c. A manually added item to **Change/Add Sku,Quantity, Description, Discount or Price** amount.

Note: Only white fields on the line item are eligible to Edit.

10. Touch/Click into **White** field

- a. **Add New Data:** Type into field
- b. **Change Current Data:** Highlight/Backspace current data. Type new data into field.

Note: When adding or editing a discount, the discount pop up window will display when you touch/click into the field. Type new discount amount or change current discount. Touch/Click the OK button.

11. Touch/Click the invoice **Save** button.

No.	Qty	SKU	Description	Unit Price	Unit Discount	Total Discount	Subtotal	Tax	Total
1	1	Custom Frame	The Italian Villa	\$1122.45	\$77.24	\$77.24	\$1045.20	\$73.16	\$1118.37
2	1		Shipping Fee	25	0.00	\$0.00	\$25.00	\$1.75	\$26.75
3	1		Aqua Blue Ready Made Frame 8x10	\$25.00	5.00	\$5.00	\$20.00	\$1.40	\$21.40
Totals				\$1172.45		\$82.24	\$1090.20	\$76.31	\$1166.52

Edit Invoice: Eligible Fields for Edit are Framed in Orange

12. If the amount exceeds the original amount you will receive the following pop up message. *Would you like to take payment on this order?*

- a. Touch/Click **Yes** to proceed to the **Accept Payment** screen and apply payment.
- b. Touch/Click **No** to Save edit. Pop-up window displays: *Would you like to Print or Email the invoice or workorder?* Touch/Click **Yes** to proceed to print. Touch/Click **No** to bypass printing. The customer will have a balance due since payment was not made.

13. If the amount is less than the original amount, you will receive the following message. Attention: This is a full edit and the invoice total has changed. It was previously \$Amount. Touch/Click **OK**.

14. The **Balance Due** will list in the invoice window. Touch/Click the **Save** button.

No.	Qty	SKU	Description	Unit Price	Unit Discount	Total Discount	Subtotal	Extended	Tax Exempt
1	1	WO# 599	Flower Bouquet	\$874.57	\$0.00	\$0.00	\$874.57	\$935.79	<input type="checkbox"/>
Total Unit Price								\$874.57	
Total Discount								\$0.00	
Subtotal								\$874.57	
Total Tax								\$61.22	
Grand Total								\$935.79	
Payments Made								\$1,100.16	
Balance Due								-\$164.37	

Invoice Window - Full Edit - Balance Due

15. Take Payment. Touch/Click **Yes**.

16. The balance due amount will display on the corresponding invoice line item. *Demo Example: Invoice #664*

17. Touch/Click the Refund button on the corresponding invoice line item under Payment History. *Demo Example: Invoice #664*

Accept Payment

Customer: Mickey Mouse

Invoice # ▼	Subtotal	Tax	Discount	Total	Payments Made	Balance	Pending Payment	
664	\$874.57	\$61.22	\$0.00	\$935.79	\$1,100.16	-\$164.37	<input type="text" value="0"/>	<input type="button" value="Details"/> <input type="button" value="Pay All"/> <input type="button" value="Pay Half"/>
385	\$362.99	\$25.41	\$0.00	\$388.40	\$388.40	\$0.00	<input type="text" value="0"/>	<input type="button" value="Details"/> <input type="button" value="Pay All"/> <input type="button" value="Pay Half"/>
317	\$1,043.04	\$73.01	\$0.00	\$1,116.05	\$1,116.05	\$0.00	<input type="text" value="0"/>	<input type="button" value="Details"/> <input type="button" value="Pay All"/> <input type="button" value="Pay Half"/>

Outstanding Balance (All Invoices) -\$164.37

Click here to Learn more about our NEW integrated credit card processor EVO Payments!

Payment History

➔	<input type="button" value="Refund"/>	1	Invoice(s):664	Cash	7/12/2022	\$1,100.16	✓
	<input type="button" value="Refund"/>	2	Invoice(s):385	Cash	3/7/2019	\$388.40	✓
	<input type="button" value="Refund"/>	3	Invoice(s):317	Cash	8/23/2018	\$1,116.05	✓
	<input type="button" value="Refund"/>	4	Invoice(s):317	Cash	8/23/2018	\$1,116.05	✓
	<input type="button" value="Refund"/>	5	Invoice(s):317	Cash	8/31/2021	\$1,116.05	✓

18. Enter **Refund Amount**. If refund will be given in Cash select box. Touch/Click the **OK** button.

✕

Refund Amount:

Refund will be given back in cash.

19. Touch/Click **Apply Payment**. **Print Invoice/Workorder**. The **Refund Amount** will be reflected on the invoice.

Payments			
Date	Type	Method	Amount
7/12/2022	Payment	Cash	\$1100.16
7/12/2022	Refund	Cash	-\$164.37
Total			\$935.79
Balance Due:			\$0.00

Edit with Price Lock

Change/Add/Delete framing order components, measurements, discounts, and specials. When a workorder has received a full edit the workorder # will contain a revision number which represents the number of edits performed on the workorder. This edit does not update pricing.

1. Touch/Click **Invoice Search** button.
2. Touch/Click the **Invoice #, Name or Phone #** field and enter corresponding data to pull up the invoice. Touch/Click **Search** button. **Demo Example:** Invoice: 266
3. Touch/Click **Price Lock** button.
4. Touch/Click the **Edit** icon on the workorder line item that you would like to edit. The workorder total with tax is \$505.76.

Invoice		266 (Revision 1)		<input checked="" type="checkbox"/> Tax Exempt?		Customer: Bill Bevel				
No.	Qty	SKU	Description	Unit Price	Unit Discount	Total Discount	Subtotal	Tax	Total	
1	1	B1234	Aqua Blue Ready Made Frame 8x10	\$25.00	2.4999	\$2.50	\$22.50	\$0.00	\$22.50	
2	1	Custom Frame	Bevel Family Portrait	\$561.95	\$56.19	\$56.19	\$505.76	\$0.00	\$505.76	
Totals				\$586.95		\$58.69	\$528.26	\$0.00	\$528.26	

Buttons: Add Work Order, Add Item, Select Customer, Save

Invoice Window - Edit Workorder with Full Price Lock

5. The workorder will display below the invoice window. Make necessary **Edits** to the workorder. See *Workorder Edit instructions above under Full Edit*. **Demo Example:** Change Height from 16 to 16.5 and Width from 20 to 20.5. Touch/Click the **Update Invoice** button. Note that the total workorder price does not change, it is still \$505.76.
6. Touch/Click the **Save** button.

Invoice		266 (Revision 1)		<input checked="" type="checkbox"/> Tax Exempt?		Customer: Bill Bevel				
No.	Qty	SKU	Description	Unit Price	Unit Discount	Total Discount	Subtotal	Tax	Total	
1	1	B1234	Aqua Blue Ready Made Frame 8x10	\$25.00	2.4999	\$2.50	\$22.50	\$0.00	\$22.50	
2	1	Custom Frame	Bevel Family Portrait	\$505.76	\$0.00	\$0.00	\$505.76	\$0.00	\$505.76	
Totals				\$530.76		\$2.50	\$528.26	\$0.00	\$528.26	

Buttons: Add Work Order, Add Item, Select Customer, Save

Invoice Window - Save Edit with Price Lock

7. Do you want to take payment on the order? Touch/Click **No**.
8. Would you like to print the invoice or workorder?
 - a. Touch/Click **Yes** to print. Proceed with printing.
 - b. Touch/Click **No** to return to the Home screen.

Partial Edit

1. Touch/Click Invoice Search button.
2. Touch/Click the **Invoice #, Name or Phone #** field and enter corresponding data to pull up the invoice. Touch/Click **Search** button. **Demo Example: Invoice: 190**
3. Touch/Click **Partial Edit**
4. Touch/Click the **Edit** icon on the invoice line item containing the custom frame order. Invoice details will load into the workorder screen below.
5. The following items can be changed in the workorder.
 - a. **Title/Description:** Touch/Click Description field – Highlight/Backspace Current Description – Type New Description
 - b. **Workorder Comments:** Touch/Click Workorder Comments Tab if not already open: Edit/Add Notes.
 - c. **Art Condition:** Touch/Click Condition type to select/de-select.
 - d. **Art Type:** Touch/Click Art type to select/de-select.
 - e. **Due Date:** Touch/Click Due Date to display Calendar. Touch/Click New Date.
6. Touch/Click **Update Invoice** Button.
7. Touch/Click Invoice **Save** button.
8. Do you want to take payment? There are no price changes on a partial edit, but this gives you the opportunity to print a new updated workorder or invoice if needed. Touch/Click **No**.
9. Do you want to print invoice Workorder? Touch/Click **Yes or No** depending on your needs.

10. Touch/Click **Done**.

Invoice 100 (Revision 1)

No.	Qty	SKU	Description	Unit Price	Unit Discount	Total Discount	Subtotal	Tax	Total
1	1	Custom Frame	Graduation Certificate	\$311.22	\$0.00	\$0.00	\$311.22	\$21.79	\$333.00
Totals				\$311.22	\$0.00	\$0.00	\$311.22	\$21.79	\$333.00

Tax Exempt?

Customer: Fred Fillet

Save

Description Graduation Certificate Art Condition Art Type Due Date: 12/16/2016

Total...

Image Size Height Width Finished Size: 19 X 24

Mouldings 1: L 2: L

Mats Top Bottom Left Right

Mats / Fillets / Fabrics 1: 2: Reveal

Conservation Clear

Museum Glass

Conservation

Conservation Clear

No Glazing

Other Glazing...

Materials:

Mouldings \$171.97

Glass \$84.32

Mats \$23.10

Fabric

Fillet

Mounting \$18.49

Stretching

Special

Engraving

Fitting On \$13.33

Art +

Misc +

Subtotal \$311.22

Discount +

Update Invoice

Specials

Mounting

Stretching

Engraving

W / O Comments

↗

Partial Edit – Eligible to Edit - Notes in Orange Arrows/Frame.

Refund

1. Touch/Click **Invoice Search** on the Main Menu.
2. Touch/Click the **Invoice #, Name or Phone #** field and enter corresponding data to pull up the invoice. Touch/Click **Search** button. **Demo Example:** Search by Name: Margie Moulding
3. Touch/Click the **Refund** button on the line item that you would like to Refund.

Invoice Search

<input type="text" value="322"/>	<input type="text" value="Name"/>	<input type="text" value="Phone"/>	<input type="text" value="Description"/>	<input type="text" value="Start Date"/>	<input type="text" value="End Date"/>	<input type="text" value="PO #"/>	<input type="button" value="Search"/>
----------------------------------	-----------------------------------	------------------------------------	--	---	---------------------------------------	-----------------------------------	---------------------------------------

Inv #	Rev	Customer	Date Created	Balance		Status	Cut Mat ID		
322	1	Martie Mat	8/27/2018	\$0.00	<input type="button" value="Pay/Refund"/>	<input type="button" value="Edit"/>	<input type="button" value="Print"/>	<input type="button" value="Other"/>	<input type="button" value="Status"/>

Page: 1

Refund Invoice Search

4. Touch/Click the **Refund** button on the corresponding line item under the Payment History heading.

Accept Payment

Customer: Martie Mat

Invoice #	Subtotal	Tax	Discount	Total	Payments Made	Balance	Pending Payment	
322	\$350.00	\$24.50	\$0.00	\$374.50	\$374.50	\$0.00	<input type="text" value="0"/>	<input type="button" value="Details"/> <input type="button" value="Pay All"/> <input type="button" value="Pay Half"/>

Outstanding Balance (All Invoices) \$0.00

Payment History

	<input type="button" value="Refund"/>	1	Invoice(s):322	Cash	8/27/2018	\$374.50	✓
---	---------------------------------------	---	----------------	------	-----------	----------	---

Refund

5. **Full Refund:** Touch/Click refund will be given back in original tender. Touch/Click No more payments will be taken. Refund amount will set the balance to zero. Touch/Click the **OK** button to refund the full amount.
6. **Payment Correction:** Touch/Click Payment **Correction** only. More payments will be taken. Add amount back to invoice balance. Most people use this option when they have made a mistake. Touch/Click OK.

✕

Refund Amount:

Refund will be given back in cash.

Why is this refund being issued?

Payment correction. More payments will be taken. Add \$374.50 back to invoice balance.

No more payments will be taken. Refund \$374.5 then set the balance to zero.

OK

Accept Payment

Customer: Martie Mat

Invoice #	Subtotal	Tax	Discount	Total	Payments Made	Balance	Pending Payment
322	\$350.00	\$24.50	\$0.00	\$374.50	\$374.50	\$0.00	<input style="width: 60px;" type="text" value="0"/> Details Pay All Pay Half

Outstanding Balance (All Invoices) \$0.00

Pending Payments

Remove 3
Invoice(s):322
Cash
8/27/2018
-\$374.50 * ←

Print Forms
Other ▾
Cash
Check
Card ▾
Apply Payment(s)

Payment History

Refund 1
Invoice(s):322
Cash
8/27/2018
\$374.50 ✓

Refund: Cash

7. Touch/Click **Apply Payment** button. **Print Invoice.**

Void

Complete voids on invoices where no money has been applied.

1. Touch/Click **Invoice Search** button.
2. Search for invoice by Invoice #, Name, Phone, Description, Start/End Date. Touch/Click Search. **Demo Example: Invoice 322.**
3. Touch/Click **Other** button drop down arrow. Touch/Click **Void** Invoice button.

The screenshot shows the 'Invoice Search' interface. At the top, there are search filters for Invoice # (322), Name, Phone, Description, Start Date, End Date, and PO #, with a 'Search' button. Below the filters is a table with columns: Inv #, Rev, Customer, Date Created, Balance, Status, and Cut Mat ID. The table contains one row for invoice 322, with a balance of \$0.00. To the right of the table are buttons for 'Pay/Refund', 'Edit', 'Print', 'Other', and 'Status'. The 'Other' dropdown menu is open, showing 'Email Invoice' and 'Void Invoice' (highlighted with an orange arrow). The page number 'Page: 1' is visible at the bottom right.

Search /Void Invoice

4. Are you sure? pop up window will display. Touch/Click field. Type **Void Reason**. Touch/Click **Yes**.

The screenshot shows a pop-up window titled 'Are you sure?'. It has a 'Void Reason' field with the text 'Forgot to add art item to the workorder.' and a 'Yes' button at the bottom right.

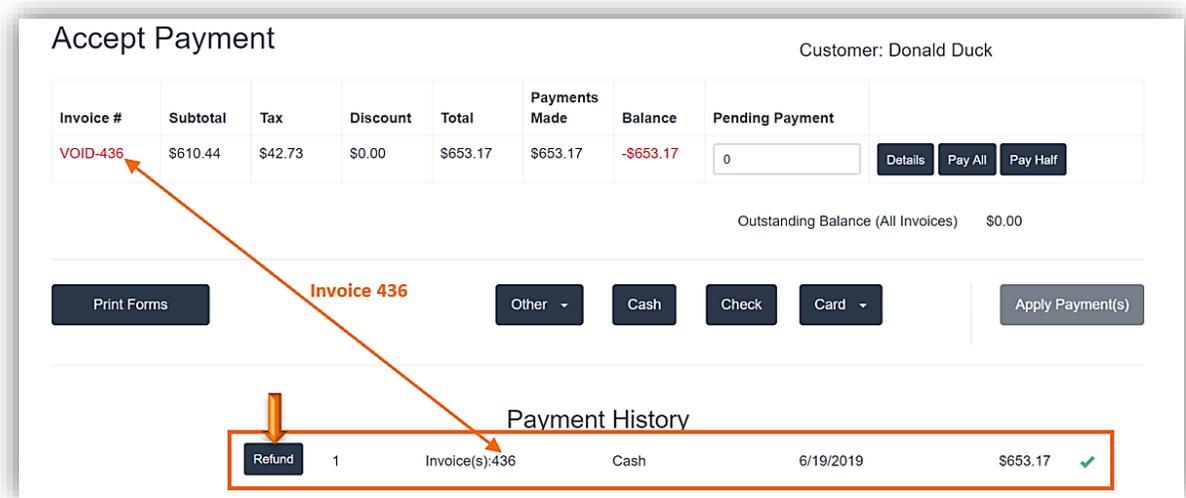
Void Reason

5. If the invoice has no applied payments, the following pop-up window will display. The invoice has been voided. Touch/Click **Ok** button.

The screenshot shows a pop-up window titled 'Message:'. It displays the text 'The invoice has been voided.' and an 'OK' button at the bottom right.

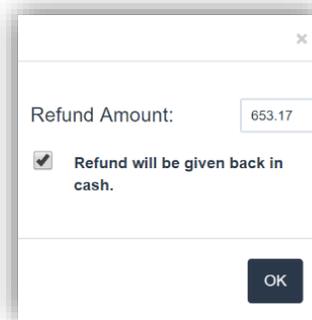
Confirmation of Void

6. If refund is owed back to the customer. The accept payment screen displays with the invoice # displaying with the word VOID in front of it in red font on the invoice line item.
- a. Under Payment History touch/click the **Refund** button on the line item that contains the invoice number that you are voiding. **Demo Example: Invoice 436.**



Refund a Void

- b. The following pop up will display. **Refund Amount.** Verify it is correct. Refund will be given back in Cash (Original payment method.) Touch/Click the **Field to Select.** Touch/Click **OK.**



Refund Amount

- c. Touch/Click **Apply Payment** button.

- d. Print Invoice. Invoice will show original Payment and Refund amount.

Payments			
Date	Type	Method	Amount
6/19/2019	Payment	Cash	\$653.17
6/19/2019	Refund	Cash	-\$653.17
Total			\$0.00

Payment Section on Invoice Copy

Add Purchase Order Number to the Invoice

1. Touch/Click the **Paper Clip** Icon located top right in the invoice window.



Invoice Not Saved Tax Exempt?  Customer: Gladys Glazing

No.	Qty	SKU	Description	Unit Price	Unit Discount	Total Discount	Subtotal	Extended	Tax Exempt
1	1	Custom Frame	The Italian Villa	\$1,041.68	\$69.17	\$69.17	\$972.51	\$1,040.58	<input type="checkbox"/>
2	1	B1234	Aqua Blue Ready Made Frame 8x10	\$25.00	0	\$0.00	\$25.00	\$26.75	<input type="checkbox"/>
3	1		Shipping	20	0	\$0.00	\$20.00	\$21.40	<input type="checkbox"/>

Total Unit Price \$1,086.68
Total Discount \$69.17
Subtotal \$1,017.51
Total Tax \$71.22
Grand Total \$1,088.73

Invoice Window – Add Purchase Order Number

2. Type **Purchase Order Number** in the field. Touch/Click the **Ok** button.

Enter PO Number:

Enter PO Number

3. The PO number will print on the invoice copy of the receipt.

1/9/2019 Payment - Picture Framing Software

Invoice # **Training Gallery** 1234 LifeSaver Lane
346 Holly Springs, GA 30142
Revision: 1 tristan@gmail.com
PO #: 123456  770-123-5678

Invoice Receipt – PO Number

Email Invoice from the Write Order/Invoice Print Window

1. Write Order/Invoice – Add Customer – Save Invoice – Process Payment – Print Window displays.
2. Touch/Click the **Email** button in the Print window.

Invoice	Print Inv?	Email Inv?	Print All?	Line Item	Print WO?	Status	Mark as Delivered?
736	<input type="button" value="Print"/>	<input type="button" value="Email"/>	<input type="button" value="Print"/>	Aqua Blue Ready Made Frame 8x10		Work Orders To Do	<input type="button" value="Deliver"/>
				Work Order: 644	<input type="button" value="Print WO:644"/>	Work Orders To Do	<input type="button" value="Deliver"/>
				Shipping		Work Orders To Do	<input type="button" value="Deliver"/>

Write Order/Invoice Print Window

3. Confirm Email window will display.
 - a. Customer's email address will auto fill if their email address has been captured in their customer profile. If not, touch/click Customer's Email field. Type customer's **Email Address**.
 - b. "Copy Store on Email" is auto selected. To de-select. Touch/Click Check field if desired.
 - c. Current Subject: "Invoice from Your Store Name". Subject can be edited by Touching/Clicking into the subject field and backspacing/deleting current subject. Type New subject.

- d. Email Body: The body of the email can be edited by Touching/Clicking into the email and backspacing/deleting current content. Type new email.
- e. Touch/Click the **Send** button.

Invoice Search

Search invoices by Number, Name, Workorder Description, Phone or Date Range to View, Make Payment, Refund, Void, Edit, Export CMC File, Re- Print or Email an invoice or workorder.

Search

1. Touch/Click **Invoice Search** on the Main Menu.
2. Search for invoice(s) by Invoice or Workorder #, Name (First. Last, Partial Name) Phone, Workorder Description, Date Range or Purchase Order Number.
 - a. Touch/Click and Type the **Invoice Number** into the Search by Invoice # field. Touch/Click **Search**. You also have the option to display or not display the invoices with a zero balance .**Demo Example: Invoice 344**

Note: All Invoices will display that contain the search data.
3. The invoice line item displays the following information: Invoice #, Revision #, Customer Name, Balance, Workorder Description, Production Status and Cut Mat ID.

Inv #	Rev	Customer	Date Created	Balance	Status	Cut Mat ID
713	1	Gladys Glazing	2/27/2025	\$0.00	Confetti Bouquet II - Work Orders To Do	11637143

Invoice Search

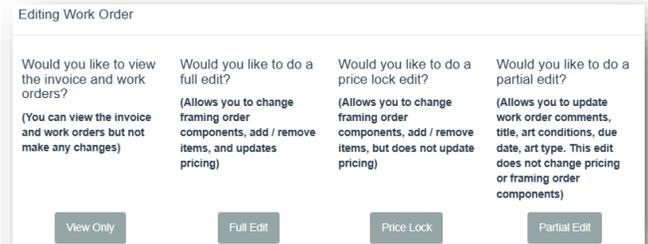
4. The following line options are available:

- a. **Pay/Refund:** Touch/Click to accept Payment on a workorder/ invoice with a balance due or process a refund.

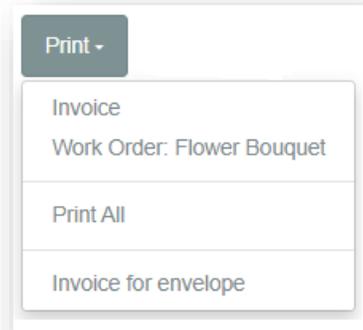
Note: See Payment and Refund instructions.

- b. **Edit:** Touch/Click to View or Edit the workorder/invoice.

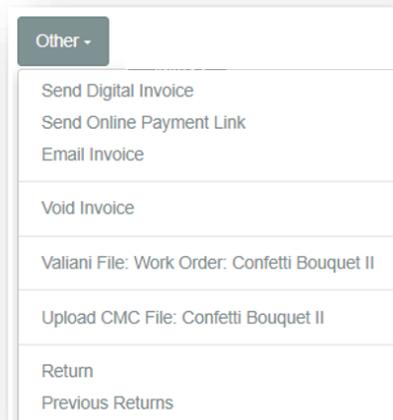
Note: See Edit workorder instructions.



- c. **Print:** Touch/Click the Print drop down arrow.
 - i. Touch/Click Invoice, Work Order Description or Print All to Print invoice and workorder.
 - ii. Invoice to Envelope: This invoice will print and fit into a double window envelope.



- e. **Other:** Touch/Click drop down arrow to access menu options.



- f. **Send Digital Invoice:** Text or email the customers invoice. The text will include a link to pull up their invoice. Ensure the email address and cell phone are correct. You can also type the email or cell in the **Phone/Email** field provided. Touch/Click the **Send** on the field that contains the cell phone number or email that you want to send the invoice too. Touch/Click **Done** to exit the window. **Marketing Assistant add-on necessary.*

- g. **Send Online Payment Link:** Send a online link to the customer so they can pay their balance due. Ensure the email address and cell phone are correct. You can also type the email or cell in the **Phone/Email** field provided. Touch/Click the **Send** on the field that contains the cell phone number or email that you want to send the payment link too. Touch/Click **Done** to exit the window. **Marketing Assistant add-on necessary.*

- **Email Invoice**
Customer's email address will auto fill if their email address has been captured in their customer profile. If not, touch/click Customer's Email field. Type customer's **Email Address**.

- **Subject:** "Invoice from Your Store Name". Subject can be edited by Touching/Clicking into the subject field and backspacing/deleting current subject. Type New subject.

- **Email Body:** The body of the email can be edited by Touching/Clicking into the email and backspacing/deleting current content. Type new email.

- Touch/Click **Send** button.

- **Void:** Touch/Click **Void** to Void the invoice.

- **Valiani or Wizard File & Upload CMC File:** See Computerized Mat Cutter Section for instructions.

Send Email

Customer's Email
✉ gladys@gmail

Subject
✎ Invoice from Training Gallery

Dear Gladys,
Thank You for your business! Your invoice is attached. If you have any questions please feel free to call me.
Regards,,
Training Gallery

Copy Store on Email

* Additional email settings can be found under Store Information tab in Store Configuration.

Cancel Send

○ **Return**

- Touch/Click **Invoice Search**.
- Pull up invoice/workorder.
- Touch/Click **Other** on the corresponding line item.
- Touch/Click **Return**.
- **Select Items To Be Returned.** All items must be in delivered status. **Demo Example:** Selected Workorder and Shipping to be returned. Touch/Click **Next**.
- **Finalized Return:** Items to be returned will display. If correct, Touch/Click **Save**.
- The Accept Payment screen will display.
- Type in **Refund Amount**.
- Touch/Click **Refund Type**. Note: You can select to **Write Off** the refund under the **Other** button.
- Touch/Click **Apply Payment** button.
- **Print** Return Invoice.

Select Items To Return

Original Invoice							
	Quantity	Initial Qty	Returned Qty	Description	Unit Price	Tax	Total
Select	1	1	0	Aqua Blue Ready Made Frame 8x10	\$25.00	\$0.00	\$25.00
Select	1	1	0	Shipping	\$20.00	\$0.00	\$20.00
Select	1	1	0	WO: 633 Confetti Bouquet II	\$1,211.11	\$0.00	\$1,211.11

Next

Finalize Return

Return Invoice					
	Quantity	Description	Unit Price	Tax	Total
Remove	1	WO: 633 Confetti Bouquet II	1211.11	\$0.00	\$1,211.11
Remove	1	Shipping	20	\$0.00	\$20.00
				Tax:	\$0.00
				Total:	-\$1,231.11

Save

Invoice # ▼	Subtotal	Tax	Discount	Total	Payments Made	Balance	Pending Payment	
713	-\$1,231.11	\$0.00	\$0.00	-\$1,231.11	\$0.00	-\$1,231.11	-\$1231.11	Details Pay All Pay Half

Return #
713-1

Training Gallery

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

Gladys and Company	Order Date: 2/27/2025
Gladys Glazing	Return Date: 2/28/2025
	Refunded: \$1231.11

1234 Glass Drive
Canton, GA 30114
gladys@gmail
Home: 770-895-4422

Description	Quantity	Price	Total
Work Order 633: WO: 633 Confetti Bouquet II	1	-\$1211.11	-\$1211.11
Shipping	1	-\$20.00	-\$20.00
			Subtotal -\$1231.11
			Tax \$0.00
			Total -\$1231.11

Refunds			
Date	Type	Method	Amount
2/28/2025	Return	Cash	\$1231.11
			Total \$1231.11

- **Previous Return:** *Displays customers previous returns. Will include invoice number, number of returns, return invoice and payment amount.*

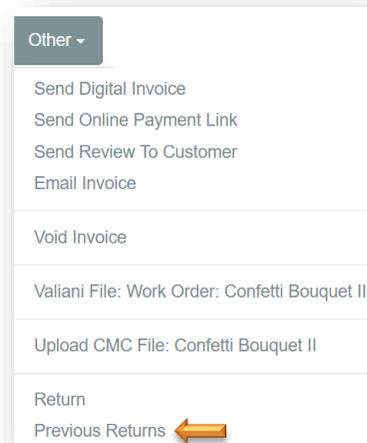
- Touch/Click **Invoice Search**.

- Pull up **invoice/Workorder**.

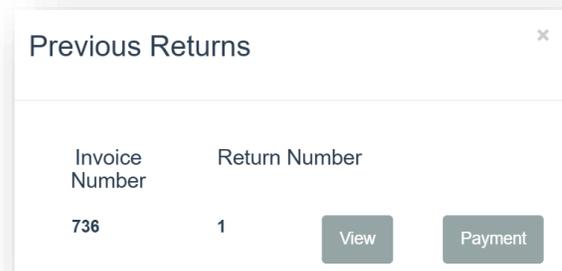
- Touch/Click **Other** button on the corresponding line item.



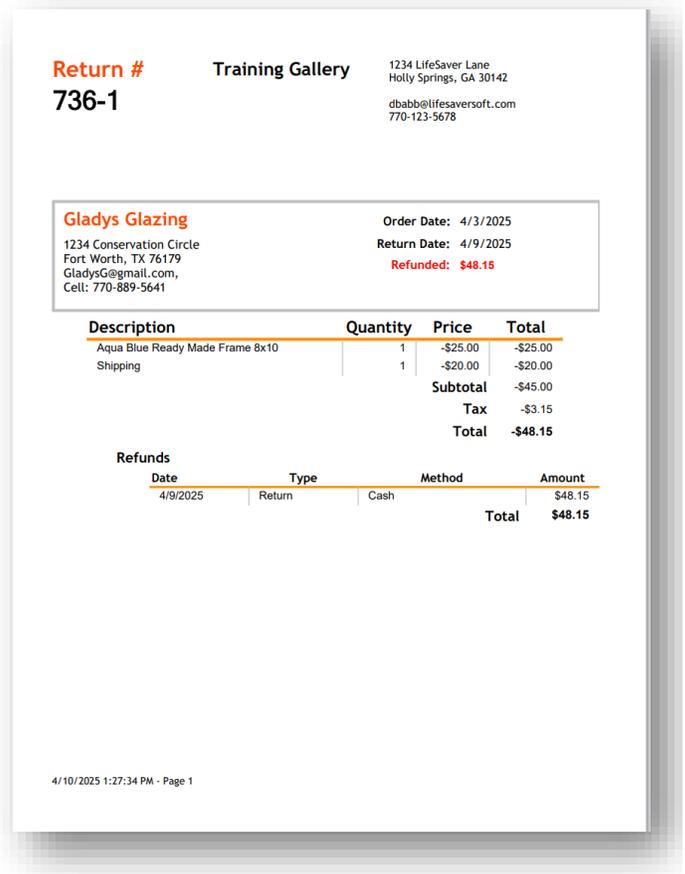
- Touch/Click **Previous Returns**.



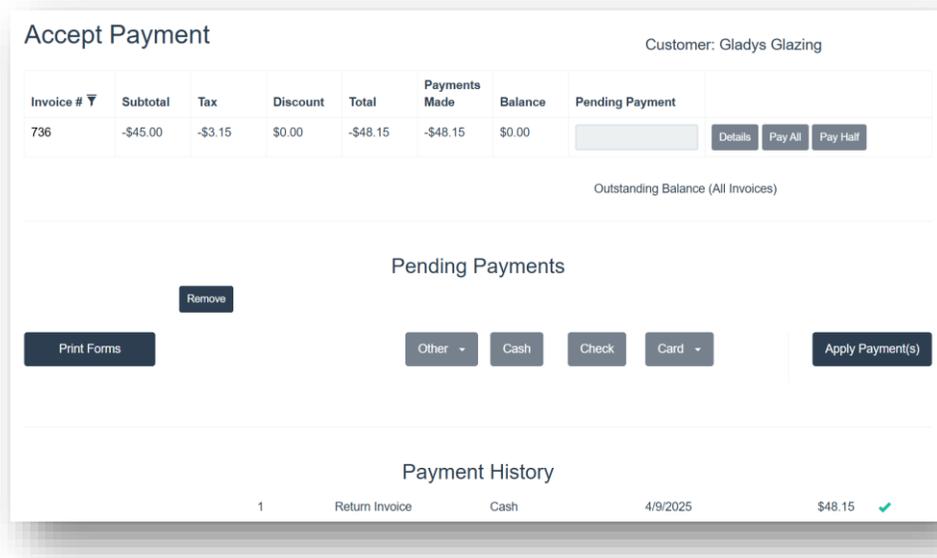
- The popup window will display the invoice number(s), number of returns, **View** button and **Payment** button.



- Touch/Click **View**. The invoice will display the items return, item amount and total refund.



- Touch/Click the **Payment** button. The **Accept Payment** window will display with the refund information and amount. All buttons are inactive except for the **Print Forms** button. Touch/Click the Home button to escape.



Note: The instructions for Payment, Refund, Edit, Void and Mat Cutter are located under the Payment, Refund, Edit, Void and Mat cutter sections.

Production (Workshop)

The Production Menu is a great management tool for your workshop. Create, Manage and Update workorder statuses to track the workorder's progression through the production process.

Currently, there are two production menu selections. The default production menu functions using a drop down selection system. The new production menu functions using a drag and drop system. Use the one that is a better fit for your store's business operations.

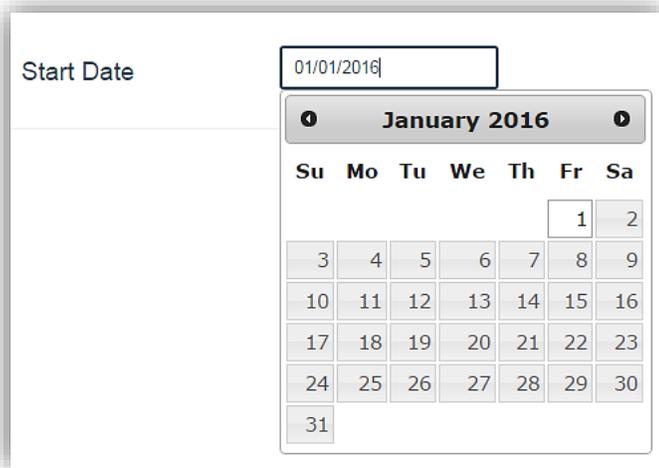
Default Production Menu

1. Touch/Click **Production** on the Main Menu.
2. Touch/Click the **Search** field and type Invoice # or First/Last/Partial Name.

Tip: Can leave search field blank and search by date range only.

3. Select **Date Range**
 - a. Touch/Click **Start Date Field** to display Calendar. Touch/Click Day/Date.
 - b. Touch/Click **End Date** Field to display Calendar. Touch/Click Day/Date.

Tip: Touch/Click Arrows to the right and left of the Month to move to the Previous/Next Month.



The screenshot shows a form with a "Start Date" label and a text input field containing "01/01/2016". A calendar pop-up is displayed below the input field, showing the month of January 2016. The calendar has a header with "January 2016" and navigation arrows. The days of the week are listed as Su, Mo, Tu, We, Th, Fr, Sa. The dates are arranged in a grid: 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31.

Production – Select Start Date Calendar

4. Workorders for the date range selected will display on the screen. The line item categories are: Workorder #, Revision #, Workorder Date & Customer Name.

Production					
Search...		Start Date	09/01/2016	End Date	09/30/2016
141	1	9/8/2016	Margie Moulding	Get Details	
140	1	9/8/2016	Sam Stretcher	Get Details	
139	1	9/8/2016	Bob Bevel	Get Details	
138	1	9/8/2016	Unassigned Unassigned	Get Details	
137	1	9/7/2016	Bob Bevel	Get Details	
136	1	9/2/2016	Gladys Glazing	Get Details	
135	1	9/2/2016	Betty Bevel	Get Details	
134	1	9/2/2016	Betty Bevel	Get Details	

Production List - Date Range 09/01/16 – 09/30/2016

5. Touch/Click the **Get Details** button on the line item that contains your invoice number.

Tip: Touch/Click & Drag the slider bar to view additional workorders in the list.

6. The Invoice Line Item Window will display the following by line if they apply.
 - a. Workorder Description Name – Sku (W/O #) – Status – Call Status – Save button.
 - b. Manual Item Description Name – Sku – Status – Save button.
 - c. Inventory Item Description Name – Sku – Status – Save button.

Invoice Line Items				
Description	SKU	Status	Call Status	
Italian Villa	175	In Progress	Not Called	Save
Shipping Charge		In Progress		Save
Aqua Blue Ready Made Frame 8x10	B1234	In Progress		Save

OK

Production - Invoice Details

7. **Select/Update Production Status** - If the invoice contains a **Framing/Work Order** In the Status column touch/click the **In Progress** drop down arrow to the right of the framing order description name and sku (workorder #). The following status options are available:
 - a. In Progress
 - b. On Order
 - c. On Hold
 - d. Void
 - e. Delivered
 - f. Assembled
8. Touch/Click the workorder's **Production Status** (stage of development) in the drop down menu.
9. Touch/Click **Save** button on same line item.

Description	SKU	Status	Call Status
Italian Villa	175	In Progress	Not Called
Shipping Charge			
Aqua Blue Ready Made Frame 8x10	B1234	In Progress	

Production –Select Framing/Work Order Status

10. **Select Workorder Call Status** – Contact your customer when their workorder is completed. Touch/Click the **Call Status** that applies in the **Call Status Drop Down List**. The following options are available:

<ol style="list-style-type: none"> a. Not Called b. Called, No Answer c. Second Call, No Answer d. Third Call, No Answer e. Called. Left Message 	<ol style="list-style-type: none"> f. Second Call, Left Message g. Third Call, Left Message h. Sent Email i. Reached Customer j. Do Not Call
---	---

11. Touch/Click **Save** button on same line item.

Description	SKU	Status	Call Status
Italian Villa	175	In Progress	Not Called
Shipping Charge		In Progress	
Aqua Blue Ready Made Frame 8x10	B1234	In Progress	

Buttons: Save, OK

Production – Call Status

12. **Invoice Item Status** – *Select* the option that applies in the **In Progress Drop Down List** in the Status column. More than likely only the following will apply to an item:

- a. On Order
- b. On Hold
- c. Delivered

13. Touch/Click **Save** button on same line item.

14. Touch/Click the **Ok** button to exit the Invoice Line Item Window and go back to the main Production screen.

Tip: Each line item status must be saved before moving to the next line item.

New Production Menu Set Up

1. Activate New Production Menu

- Touch/Click the **Store Configuration** button.
- Touch/Click the **Settings** tab.
- Touch/Click **Use New Production Screen** field to Select.
- Touch/Click **Save**.

Note: Your main menu will now display the Production NEW! Button.

Production NEW!

2. Manage/Create/Edit Production Statuses and Rules: Set up and Manage your workorder status production process. Select/Deselect, Edit or Create New workorder statuses and applicable production rules.

- Touch/Click **Production New** button on the main menu.
- Touch/Click the **Manage Status** button.

The screenshot displays the 'Production Status' interface. At the top right, there is a 'Manage Status' button with an orange arrow pointing to it. Below the title, there is a search bar and two date filters: 'Start Date: 09/19/2018' and 'End Date: 10/11/2018'. The main content is organized into five vertical columns representing different production stages: 'OnOrder', 'InProgress', 'Assembled', 'Delivered', and 'OnHold'. Each column contains a list of items with details such as Work Order, Invoice, and Store. For example, in the 'OnOrder' column, items include 'Fred Fillet' (Work Order: 354, Invoice: 333) and 'Matthew Mat' (Work Order: 357, Invoice: 336). In the 'InProgress' column, items include 'Betty Bevel' (Work Order: 352, Invoice: 332) and 'Gladys Glazing' (Work Order: 353, Invoice: 332). The 'Assembled' column shows 'Gladys Glazing' (Work Order: 355, Invoice: 334). The 'Delivered' column lists 'Valley Moulding' (Work Order: 329, Invoice: 329) and 'Matthew Mat' (Work Order: 336, Invoice: 336). The 'OnHold' column is currently empty. Navigation arrows are visible on the left and right sides of the main content area.

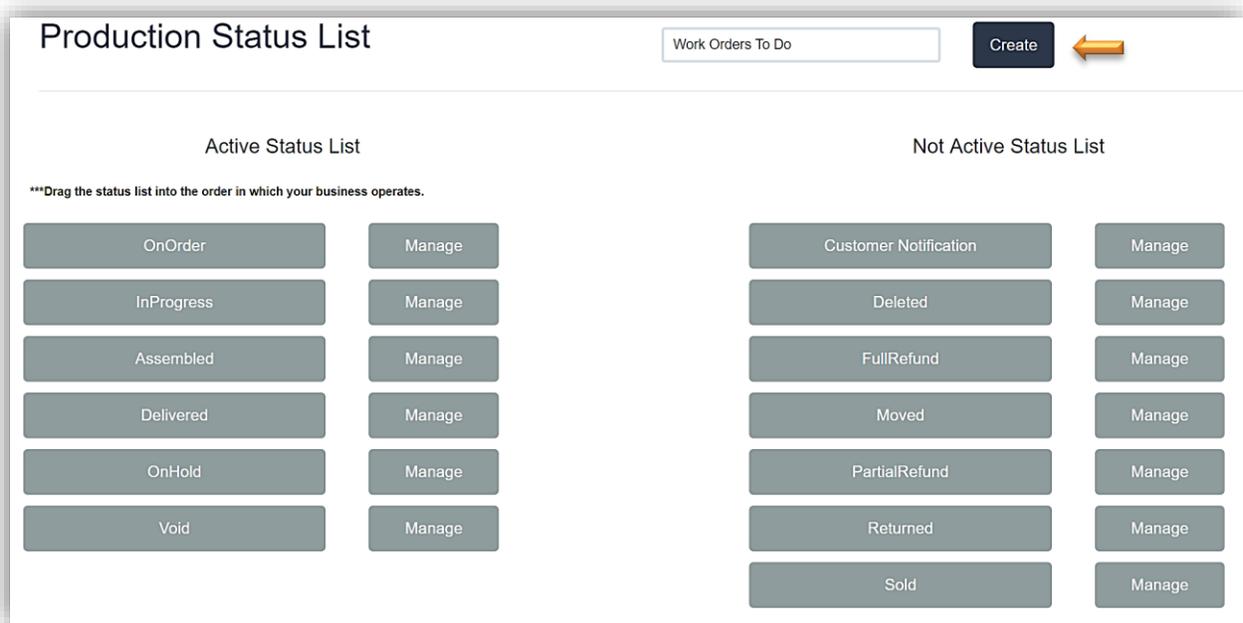
Production New Main Screen

- c. The current default **Active Status** process that displays on the main production screen:
- On Order
 - In Progress
 - Assembled
 - Delivered
 - On Hold
 - Void

- d. The current default **Not Active Status** list that can be selected and added to the production process.
- Deleted
 - Full Refund
 - Moved
 - Partial Refund
 - Sold

3. Create New Workorder Status.

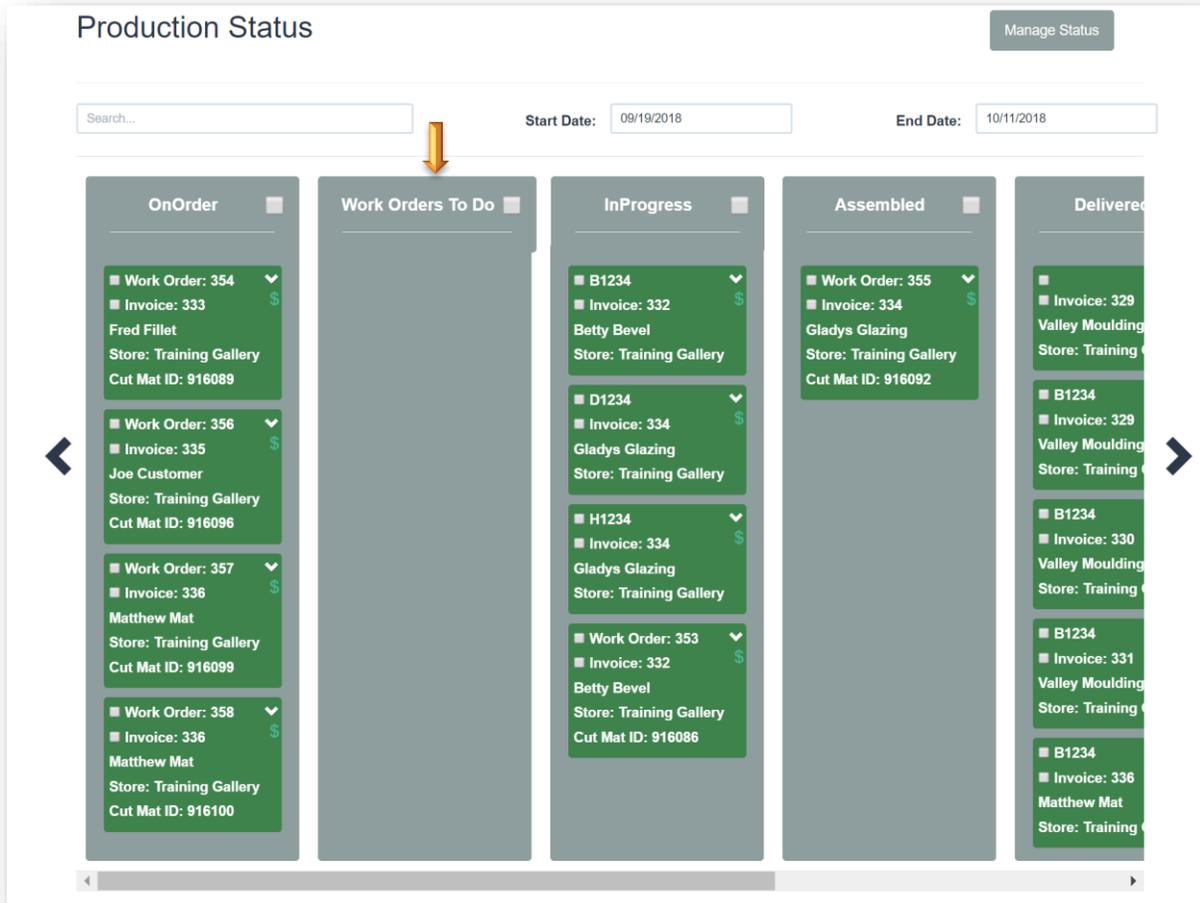
- a. Touch/Click the **Production New** button on the main menu. Touch/Click the **Manage Status** button.
- b. Touch/Click into the field to the left of the Create button. Type **Status Name**. **Demo Example:** "Workorders To Do".



Create New Production Menu

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

d. The **New Status** (Workorders To Do) will now appear on your Main Production screen.



Create New Production Status

- e. **Demo Example:** The Workorders to Do status is going to replace the On Order status. The invoice/workorders currently listed under the On Order column will need to be dragged and dropped into the Workorder to Do status column, before you can delete the On Order status.

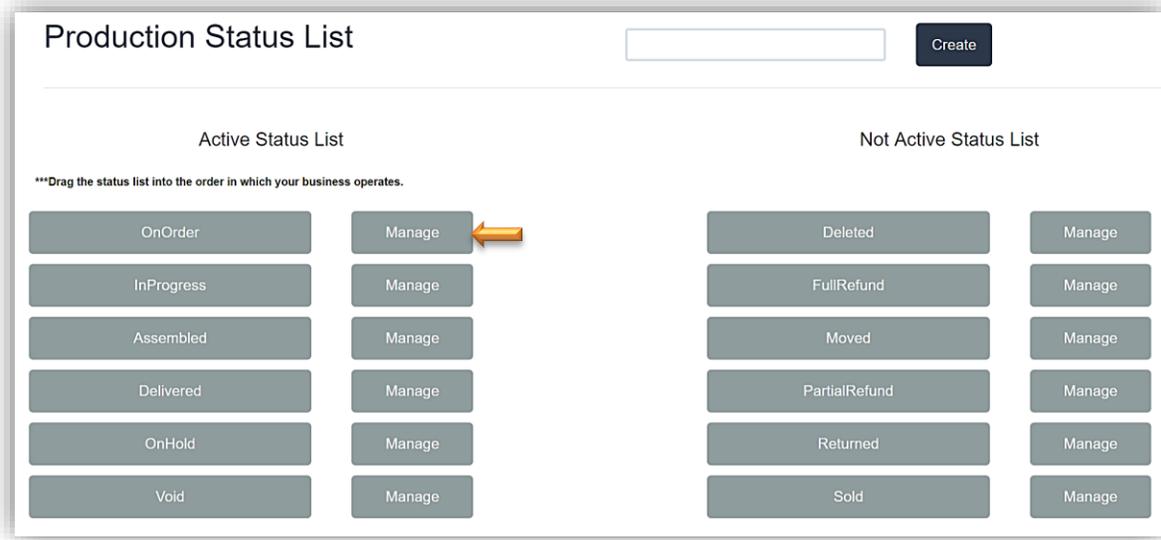
Production Status Manage Status

Search... Start Date: 09/19/2018 End Date: 10/11/2018

OnOrder	Work Orders To Do	InProgress	Assembled	Delivered
	<ul style="list-style-type: none"> Work Order: 358 <ul style="list-style-type: none"> Invoice: 336 Matthew Mat Store: Training Gallery Cut Mat ID: 916100 Work Order: 357 <ul style="list-style-type: none"> Invoice: 336 Matthew Mat Store: Training Gallery Cut Mat ID: 916099 Work Order: 356 <ul style="list-style-type: none"> Invoice: 335 Joe Customer Store: Training Gallery Cut Mat ID: 916096 Work Order: 354 <ul style="list-style-type: none"> Invoice: 333 Fred Fillet Store: Training Gallery Cut Mat ID: 916089 	<ul style="list-style-type: none"> B1234 <ul style="list-style-type: none"> Invoice: 332 Betty Bevel Store: Training Gallery D1234 <ul style="list-style-type: none"> Invoice: 334 Gladys Glazing Store: Training Gallery H1234 <ul style="list-style-type: none"> Invoice: 334 Gladys Glazing Store: Training Gallery Work Order: 353 <ul style="list-style-type: none"> Invoice: 332 Betty Bevel Store: Training Gallery Cut Mat ID: 916086 	<ul style="list-style-type: none"> Work Order: 355 <ul style="list-style-type: none"> Invoice: 334 Gladys Glazing Store: Training Gallery Cut Mat ID: 916092 	<ul style="list-style-type: none"> Invoice: 329 <ul style="list-style-type: none"> Valley Moulding Store: Training B1234 <ul style="list-style-type: none"> Invoice: 329 Valley Moulding Store: Training B1234 <ul style="list-style-type: none"> Invoice: 330 Valley Moulding Store: Training B1234 <ul style="list-style-type: none"> Invoice: 331 Valley Moulding Store: Training B1234 <ul style="list-style-type: none"> Invoice: 336 Matthew Mat Store: Training

Moved Invoices/Workorders from On Order status to Workorders to Do status.

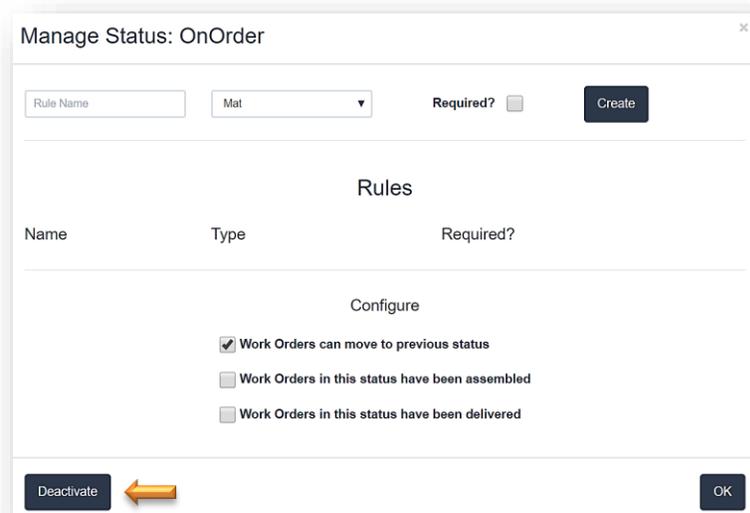
4. **Activate/Deactivate a Status** in the workorder production process. Touch/Click the **Manage Status** button on the main Production Status screen. **Demo Example:** Deactivate the “On Order” status.



Manage Production Statuses

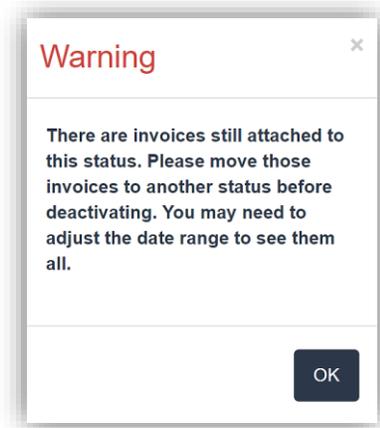
- a. Touch/Click the **Manage** button on the desired line item. **Demo Example:** On Order.
- b. The Manage Status window displays on the screen. Touch/Click the **Deactivate** button in the “On Order” status window.

Note: If you select an Active status you will receive the Deactivate button. If you select from the Not Active status you will receive the Activate button.



Deactivate On Order Production Status

Note: If there are workorders that are currently in the status that you are deactivating you will receive the warning to the left. The workorders will need to move to another status before deactivating. Select a new start date range that will include all of the workorders that are designated with that status. **Demo Example:** All of the workorders that are listed in the “On Order” status column can be moved to the “Workorders To Do” status column.



5. Arrange Active Status Order

- a. Touch/Click and Drag the **Status** button into the **Correct Position** in the list to arrange the production order that works for your stores’ production process.

6. Set Status Configure Options

- a. Touch/Click the **Production New** button on the main menu. Touch/Click the **Manage Status** button.
- b. Touch/Click the **Manage** button on the desired status line item. **Demo Example:** *Delivered*.
- c. In the Manage Status window under the **Configure** heading the following options are available.
- d. Workorder can be moved to Previous status. Touch/Click to **Select/De-Select**. **Demo Example:** *Move a workorder from Delivered status back to Assembled status.*

Note: If you select a workorder that is configured not to move to the previous status you will receive the following alert.. (Required field not checked.)

Dang! An error has occurred:

- You cannot move work orders in reverse from the status of: InProgress

- e. Workorders in this status have been assembled. Touch/Click to **Select/De-Select**.
- f. Workorders in this status have been delivered. Touch/Click to **Select/De-Select**.

- g. Touch/Click **OK** to save change.

Manage Status: Delivered

Rule Name Mat Required? Create

Rules

Name	Type	Required?
------	------	-----------

Configure

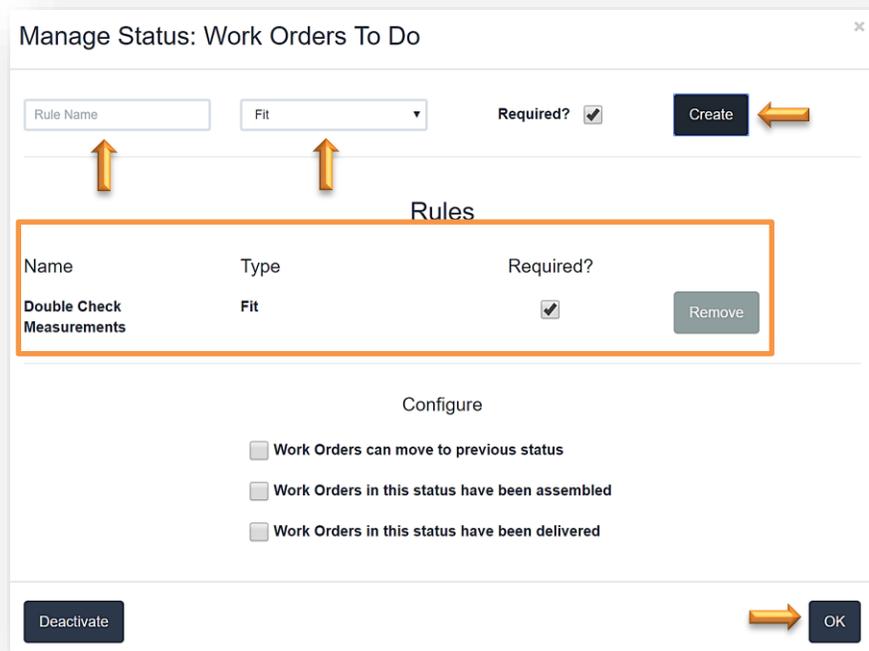
- Work Orders can move to previous status
- Work Orders in this status have been assembled
- Work Orders in this status have been delivered

Deactivate OK

Manage Production Status:

7. **Add Status Type Production Rule.** Create a rule that the user has to acknowledge before they are able to move a workorder from one status to the next. **Demo Example:** Before the workorder can be moved from “Work Orders To Do” to “In Progress” status a rule can be created that the user needs to double check the workorder’s measurements.
- a. Touch/Click the **Production New** button on the main menu. Touch/Click the **Manage Status** button.
 - b. Touch/Click on the **Manage** button on the status line item to add a production rule. **Demo Example:** Workorders To Do.
 - c. Type **Production Rule** into the rule name field. **Demo Example:** Double check measurements. The user will have to acknowledge the “Double check measurements” rule before they can move the workorder from “Work Orders To Do” status to “In Progress” status.
 - d. Touch/Click drop down arrow and **Component/Labor Type** that relates to the rule in the dropdown list. **Demo Example:** Fit.
 - e. Touch/Click the **Required** field to select that the rule is required.

- f. Touch/Click the **Create** button.
- g. The Production Rule will list under the **Name – Type and Required** headings in the window.
- h. Touch Click the **OK** button to Save.

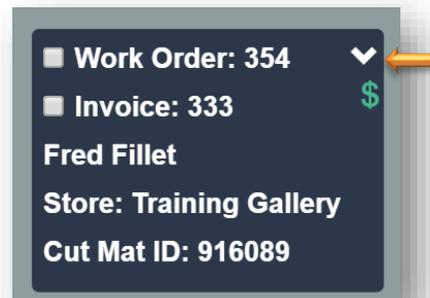


Create Status Production Rule

8. **Acknowledgement of the status production rule.** *The workorders display in their current status column on the main production screen. The workorders that are highlighted in green do not contain a rule, so they are able to be moved to the next status in the production process. The workorders highlighted in navy blue contain a rule that needs to be acknowledged before they are able to be moved to the next status.*

- a. Touch/Click on **Production New!** Button. **Demo Example:** Move a workorder that contains a production rule (Navy Blue Block) from “Work Orders To Do” status to “In Progress” status.

- b. Touch/Click **Down Arrow** on a workorder in navy blue block that you would like to move to the next status in the production process. **Demo Example:** Workorder 354 from “Work Orders to Do” status to “In Process” status.



- c. The Production Rules window will open for the selected work order and will list the rule(s) that are required in order to move the status in the production process. Touch/Click the **Done** field to confirm receipt. Touch/Click the **OK** button to save.

Production Rule Window

- d. The workorder block will now be green on the main Production Status screen and is able to move forward to the next step in the production process.

9. **Edit Production Rule.** Remove rule or select/deselect that rule is required.
 - a. Touch/Click on **Production New!** Button. Touch/Click **Manage Status** button. Touch/Click on the corresponding status **Manage** button.
 - b. Touch/Click **Remove** button on corresponding production rule line item. Touch/Click **OK** to Save.

- c. Touch/Click the **Remove button** on the corresponding production rule line item to delete rule. Touch/Click **OK** to Save.

Manage Status: Work Orders To Do

Rule Name Mat Required? Create

Rules

Name	Type	Required?
Double Check Measurements	Fit	<input checked="" type="checkbox"/>

Remove

Configure

Work Orders can move to previous status

Work Orders in this status have been assembled

Work Orders in this status have been delivered

Deactivate OK

Remove Production Rule and or Requirement

Production Set-Up is Complete!

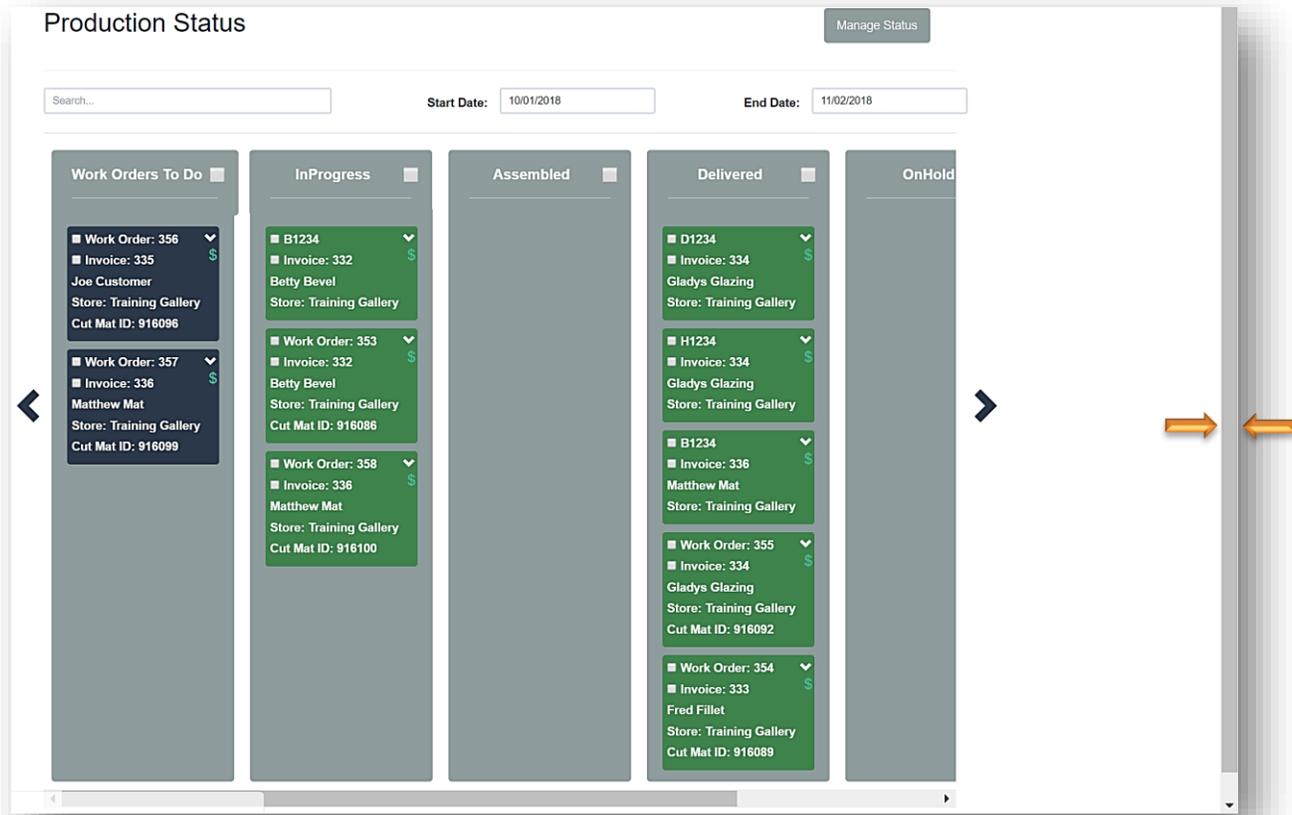
Production Status Screen Navigation

1. Scroll production status columns horizontally on screen: There are 2 options to do so.
 - a. Touch/Click one of the **Two Large Navy Blue < > Arrows**. The first arrow is located to the left of the first status column. Touch/Click to **Scroll Left** to the previous status column. The second arrow is located to the right of the last visible status column. Touch/Click to **Scroll Right** to the next status column.
 - b. Touch/Click & Drag Slider Bar located below status columns to the **Right or Left**.

The screenshot displays the 'Production Status' interface. At the top right is a 'Manage Status' button. Below it is a search bar and date filters for 'Start Date: 10/01/2018' and 'End Date: 11/02/2018'. The main content area is divided into five vertical columns: 'Work Orders To Do', 'InProgress', 'Assembled', 'Delivered', and 'OnHold'. Each column contains a list of items with details like Work Order, Invoice, Customer, Store, and Cut Mat ID. Navigation is facilitated by large navy blue arrows on the left and right sides of the columns, and a horizontal slider bar at the bottom.

Production Status Navigation – Scroll Horizontally

3. Scroll production status columns vertically. The **Vertical Slider Bar** will display if all of the workorders cannot display in each production status column at once. Touch/Click & Drag the slider bar to the right of the last production status column that appears on the screen to **Scroll Up and Down**. If you are using a mouse you can use the scroll wheel to move the screen up and down.



Production Status Navigation – Scroll Vertically

Update Production Status

1. The main screen will display the last 2 weeks workorders/invoices categorized by current status. Alternate date ranges can be selected. The workorders are updated by dragging and dropping the workorder into the next status column. There is a Search function that can filter by first/last name and workorder number.

a. Touch/Click the **Production New!** Button.

The screenshot shows the 'Production Status' interface. At the top right is a 'Manage Status' button. Below it is a search bar and two date range selectors: 'Start Date: 10/09/2018' and 'End Date: 10/31/2018'. The main area is divided into five vertical columns representing different production stages: 'Work Orders To Do', 'InProgress', 'Assembled', 'Delivered', and 'OnHold'. Each column contains a list of items, each with a dropdown arrow and a dollar sign icon. The 'Work Orders To Do' column has four items, 'InProgress' has four, 'Assembled' has two, and 'Delivered' has two. The 'OnHold' column is currently empty. Navigation arrows are visible on the left and right sides of the main content area.

Work Orders To Do	InProgress	Assembled	Delivered	OnHold
Work Order: 354 Invoice: 333 Fred Fillet Store: Training Gallery Cut Mat ID: 916089	B1234 Invoice: 332 Betty Bevel Store: Training Gallery	Work Order: 355 Invoice: 334 Gladys Glazing Store: Training Gallery Cut Mat ID: 916092	B1234 Invoice: 336 Matthew Mat Store: Training Gallery	
Work Order: 356 Invoice: 335 Joe Customer Store: Training Gallery Cut Mat ID: 916096	D1234 Invoice: 334 Gladys Glazing Store: Training Gallery			
Work Order: 357 Invoice: 336 Matthew Mat Store: Training Gallery Cut Mat ID: 916099	H1234 Invoice: 334 Gladys Glazing Store: Training Gallery			
Work Order: 358 Invoice: 336 Matthew Mat Store: Training Gallery Cut Mat ID: 916100	Work Order: 353 Invoice: 332 Betty Bevel Store: Training Gallery Cut Mat ID: 916086			

Production Status Screen

- b. There are blocks that contain a workorder and blocks that contain a sold inventory item.

Note: Navy blue blocks contain a production rule that must be acknowledge before they are able to move to a new status. Green blocks do not have a production rule that is attached and can move to the new status.

c. Workorder Blocks

- Workorder Number
- Invoice Number
- Customer Name
- Store Name
- Cut Mat ID Number
- \$: Aqua Blue \$ represents no balance due. Red \$ represents workorder balance due. A workorder with a balance due cannot be delivered.
- Down Arrow: Each workorder has the following options available under the down arrow: Call Status, Bin Location, Add Work Order Notes, Production Rules and Print Workorder.



d. Inventory Item Blocks

- Inventory Item Code
 - Invoice Number
 - Customer Name
 - Store Name
- Note:** You can select or de-select to view and move inventory items through the production process in the Store Configure menu under the settings tab.



2. **Update Workorder to In Progress Status:** Touch/Click & Drag Workorder block from Work Orders To Do Status column to **In Progress Status** column. **Demo Example:** Workorder 354.

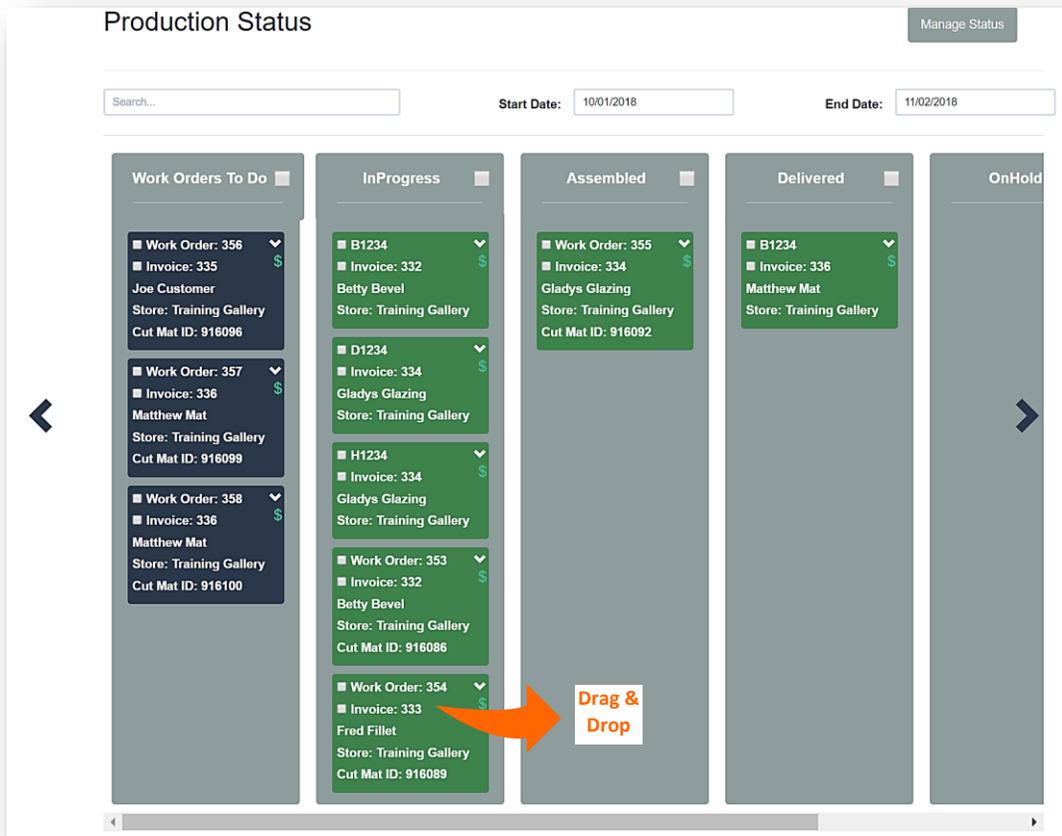
Note: If the workorder is highlighted in navy blue, you must touch/click the down arrow and acknowledge production rule to be able to update status. Refer to: Step 8. Acknowledgement of Production Rules for instructions.

The screenshot displays the 'Production Status' interface. At the top right is a 'Manage Status' button. Below it are search and date filters: 'Search...', 'Start Date: 10/09/2018', and 'End Date: 10/31/2018'. The main area is divided into five columns: 'Work Orders To Do', 'InProgress', 'Assembled', 'Delivered', and 'OnHold'. An orange arrow points from a workorder in the 'Work Orders To Do' column to the 'InProgress' column. A 'Drag & Drop' tooltip is visible over the target workorder in the 'InProgress' column.

Work Orders To Do	InProgress	Assembled	Delivered	OnHold
<ul style="list-style-type: none">Work Order: 354 Invoice: 333 Fred Fillet Store: Training Gallery Cut Mat ID: 916089	<ul style="list-style-type: none">B1234 Invoice: 332 Fred Fillet Store: Training GalleryD1234 Invoice: 334 Gladys Glazing Store: Training GalleryH1234 Invoice: 334 Gladys Glazing Store: Training GalleryWork Order: 353 Invoice: 332 Betty Bevel Store: Training Gallery Cut Mat ID: 916086	<ul style="list-style-type: none">Work Order: 355 Invoice: 334 Gladys Glazing Store: Training Gallery Cut Mat ID: 916092	<ul style="list-style-type: none">B1234 Invoice: 336 Matthew Mat Store: Training Gallery	

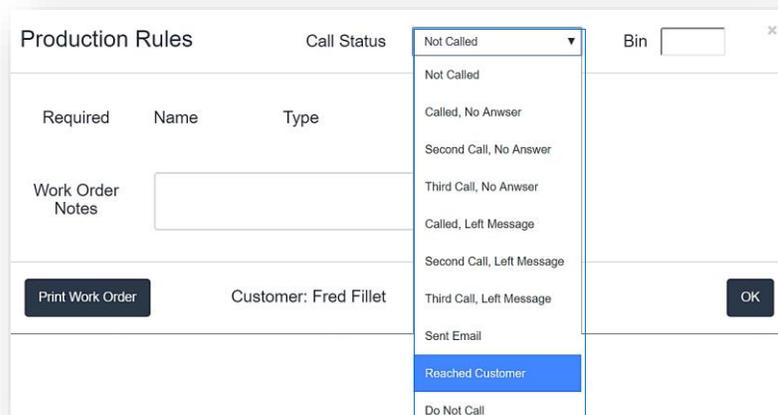
Production Status: Workorders to Do to In Progress Status

3. **Update Workorder to Assembled.** Touch/Click the **Production New!** Button. Touch/Click & Drag Workorder block from the In Progress Status column to **Assembled Status** column. **Demo Example: Workorder #354**



Production Status – In Progress to Assembled Status

4. **Assembled Status Option** - Update Customer Call Status: *Notify customer that order is ready to be picked up.* Touch/Click **Workorder #309 Down Arrow** located top right corner in the green box. Contact customer to notify them that their workorder is ready to be picked up. Touch/Click **Call Status** drop down arrow in the Production Rules window. **Touch/Click Customer Contact Action/Result.** **Demo Example: Reached Customer.** Touch/Click **OK to Save.**



Production Rule – Select Customer Call Status

5. **Update Workorder to Delivered Status** upon customer pickup. Touch/Click the **Production New!** Button. Touch/Click & Drag Workorder block from Assembled to the **Delivered Status** column. **Demo Example: Workorder #354.**

The screenshot displays a 'Production Status' dashboard with a search bar and date filters (Start Date: 10/01/2018, End Date: 11/02/2018). The dashboard is organized into five columns representing different stages of production:

- Work Orders To Do:** Contains three work orders (356, 357, 358) with associated invoices and customer/store information.
- InProgress:** Contains four work orders (B1234, D1234, H1234, 353) with associated invoices and customer/store information.
- Assembled:** Contains two work orders (355, 354) with associated invoices and customer/store information. An orange arrow points from a work order in this column to the Delivered column, with a 'Drag & Drop' label.
- Delivered:** Contains two work orders (B1234, 354) with associated invoices and customer/store information.
- OnHold:** Currently empty.

Production Status – Assembled to Delivered Status

6. **Multiple Workorders on One Invoice:** Touch/Click the **Production New!** Button. Each workorder will list individually on the Production Status screen, therefore they are able to be moved from one status to the next individually. **Demo Example:** Invoice 336 contains the following workorders below 357 & 358 in the Workorders to Do status.

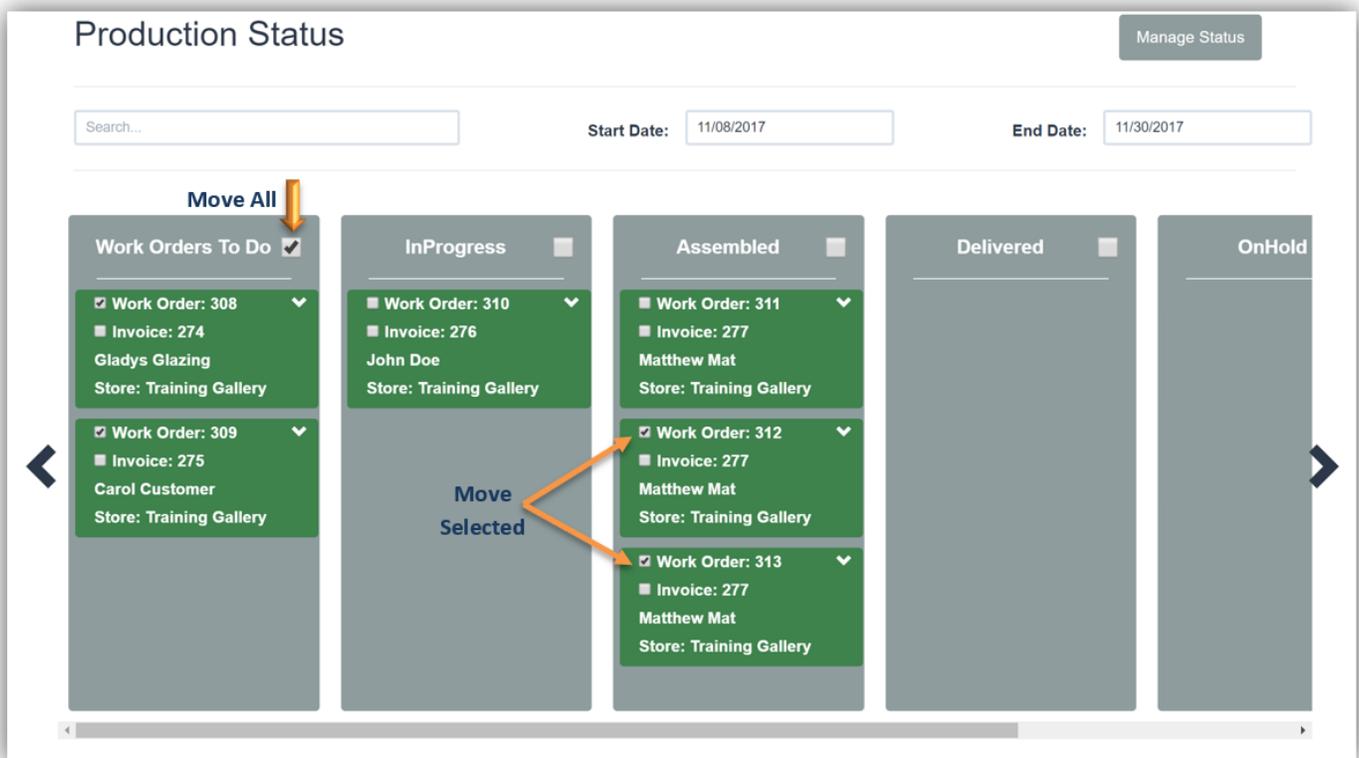
Note: There is an option to require that multiple workorders on one invoice can only be delivered at the same time in the Store Configuration menu under the Settings tab.

The screenshot displays the 'Production Status' interface. At the top right is a 'Manage Status' button. Below it are search and date filters: 'Search...', 'Start Date: 10/01/2018', and 'End Date: 11/02/2018'. The main area is divided into five columns representing different production stages:

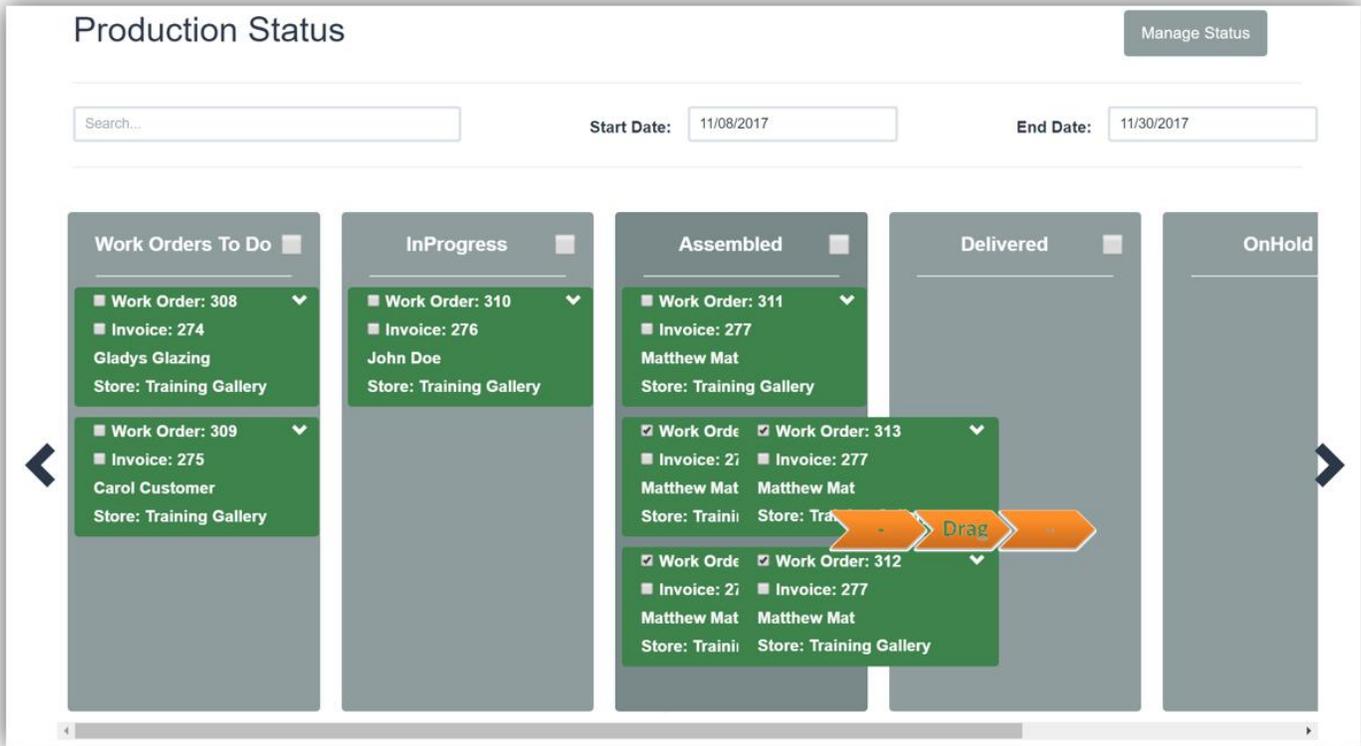
- Work Orders To Do:** Contains three workorders. The first is Work Order 356 (Invoice 335, Joe Customer, Cut Mat ID: 916096). The second is Work Order 357 (Invoice 336, Matthew Mat, Cut Mat ID: 916099), with an orange arrow pointing to it from the right. The third is Work Order 358 (Invoice 336, Matthew Mat, Cut Mat ID: 916100), also with an orange arrow pointing to it from the right.
- InProgress:** Contains three workorders: B1234 (Invoice 332, Betty Bevel, Cut Mat ID: 916086), D1234 (Invoice 334, Gladys Glazing, Cut Mat ID: 916086), and H1234 (Invoice 334, Gladys Glazing, Cut Mat ID: 916086).
- Assembled:** Contains two workorders: Work Order 354 (Invoice 333, Fred Fillet, Cut Mat ID: 916089) and Work Order 355 (Invoice 334, Gladys Glazing, Cut Mat ID: 916092).
- Delivered:** Contains one workorder: B1234 (Invoice 336, Matthew Mat, Cut Mat ID: 916086).
- OnHold:** Currently empty.

Production Status - Multiple Workorders On One Invoice

7. Move all or selected multiple invoice/workorders blocks from one status to the next at one time.
 - a. Touch/Click the **Production New!** Button
 - b. Move all workorders listed in one status column to the next status column. **Demo Example:** Move all workorders listed in the **Workorders To Do** column to the **In Progress Status** column. Workorders #308 and #309. Touch/Click the **Field** to the right of the **Workorders To Do** column heading to select all workorders. Note that the **Workorder Fields** are now selected in each green box. Touch/Click and Drag on a workorder in the **Workorders To Do** Status column to **Move All** workorders to the **In Progress** Status column.
 - c. Move selected multiple workorders listed in one status column to the next status column. **Demo Example:** Move Workorders #312 & #313 from the **Assembled** status column to the **Delivered Status** column. Touch/Click **Field** in the green box to the right of the **Workorders #312 & #313** to Select. Touch/Click and Drag a workorder in the **Assembled Status** column to **Move Both Workorders** to the **Delivered Status** column.



Production Status – Designate To Move All or Selected Workorders To Next Status



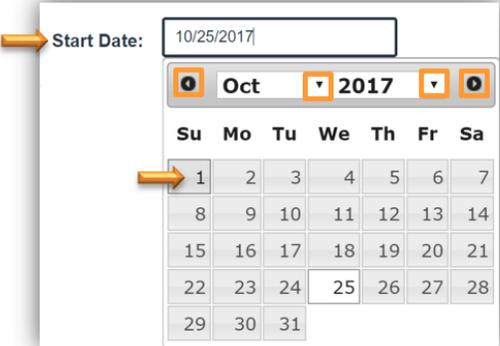
Production Status – Touch/Click & Drag Selected Workorders To Next Status

Production Status Options

The following are available: Edit Start/End Date Range, Search, Add Workorder Notes, Add Bin Number, Print Workorder and Customer Call Status.

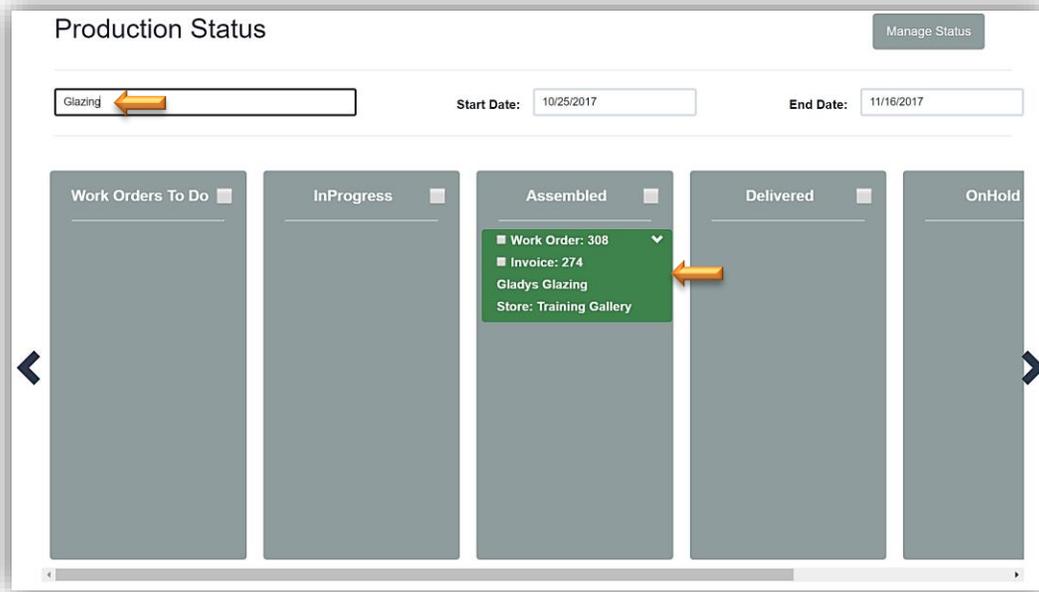
1. **Edit Start/End Date Range:** Touch/Click the *Production New!* Button. The default date range is the past 14 days. To edit Touch/Click **Start and or End Date field** to display calendar. Touch/Click **New Start/End date**.
2. **Calendar Navigation:** Touch/Click Month/Year drop down arrows to select different Month/Year. Touch/Click Month/Year horizontal arrows to select Previous < or Next month >.

Demo Example: Default date is 10/25/2017. Desired date is 10/01/2017.



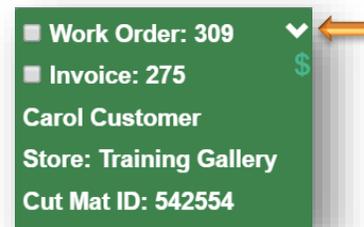
Production Status – Select New Date Range

3. **Search:** Touch/Click the **Production New!** Button. The Search function is useful when looking for a specific workorder, especially if each status contains many workorders. Touch/Click the **Search** field. **Type Workorder Number, Invoice Number, First, Last or Partial Name.** Workorders that contain the search criteria will display in their current status. It may be necessary to scroll either up/down or across statuses to view. Ensure that the workorder you are searching falls into the existing Start/End date range. **Demo Example:** Last name: Glazing. The workorder has been assembled and is ready for pick up.



Production Status - Search

4. **Add Workorder Notes:** Touch/Click the **Production New!** Button. Touch/Click **Workorder Drop Down Arrow** in the green or navy blue box. The Production Rule window will display. Touch/Click into the **Workorder Notes Field** to enter notes. Touch/Click **Ok** button to Save.
5. **Add Bin Number:** Touch/Click the **Production New!** Button. Touch/Click **Workorder Drop down Arrow** in the green or navy blue box. The Production Rule window will display. Touch/Click Bin field. **Type Bin Number.** Touch/Click **OK.**
6. **Print Workorder:** Touch/Click the **Production New!** Button. Touch/Click **Workorder Drop down Arrow** in the green or navy blue box. The Production Rule window will display. Touch/Click the **Print Work Order** button. Touch/Click **Print** button on Workorder preview screen. Touch/Click **Print** button on printer preview screen. Touch/Click **X to Close** workorder preview window. Touch/Click **OK** to close Production Rule window.



7. **Call Status:** See Call Status instructions under number 10: Production Status.

Production Rules

Call Status Not Called Bin 123

Required	Name	Type	Done	Bin
	Work Order Notes		<input type="checkbox"/>	Text Carol when her order is complete. 123-456-7890

Print Work Order Customer: Carol Customer OK

Production Status Options

Customer Database

Create, View, Edit or Delete Customer Profile Details. Additional options: View or Edit an Invoice/Workorder and Process a Payment on an invoice/workorder with a balance due.

Create New

1. Touch/Click the **Customer Database** button on the Main Menu.
2. Touch/Click the **Create New** button located upper right screen.

The screenshot displays the 'Customer Database' interface. At the top, there are three buttons: 'Create New', 'Merge Customer', and 'Customer Types'. Below these is a search bar with the placeholder text 'Last Name, First Name, Email, Cell, Phone, Company, or Customer Type' and a 'Search' button. The main area contains a table with the following headers: 'First Name', 'Last Name', 'Company', 'Cell', 'Phone', 'Email', 'City', and 'Customer Type'. The table is currently empty. In the bottom right corner, it shows 'Page: 1' with a right-pointing arrow.

Customer Database

3. Touch/Click and **Type the Customer's Information** into the applicable fields.
4. **Tax ID** and **Customer Default Discount Percentage** will automatically apply in the write order/invoice.

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

Add New Customer

Back

First Name	<input type="text" value="Fred"/>	Last Name	<input type="text" value="Fillet"/>	Customer Type	<input type="text" value="Select"/>
Phone	<input type="text" value="817-789-4568"/>	Street	<input type="text" value="1234 Picture Park Drive"/>	Tax Id	<input type="text"/>
Email	<input type="text" value="fredfillet@gmail.com"/>	Street Con't	<input type="text"/>	Discount %	<input type="text" value="0"/>
Cell	<input type="text" value="817-123-4567"/>	City	<input type="text" value="Fort Worth"/>	Do Not Call	<input type="checkbox"/>
Work	<input type="text" value="555-555-5555"/>	State	<input type="text" value="TX"/>	Do Not Email	<input type="checkbox"/>
Fax	<input type="text" value="555-555-5555"/>	Zip	<input type="text" value="76179"/>	Do Not Bill	<input type="checkbox"/>
				Do Not Mail	<input type="checkbox"/>

Alert

Notes

Company Name	<input type="text"/>	City	<input type="text"/>
Business Street	<input type="text"/>	State	<input type="text"/>
Business Street Con't	<input type="text"/>	Business Zip	<input type="text"/>

Save

Customer Database - Add New Customer

Search

1. Touch/Click the **Customer Database** button on the Main Menu.
2. Touch/Click the Search field. **Type First/Last/Partial Name, Company Name, Phone Number or Customer Type**. Touch/Click the **Search** button. A customer list will display that contains the search criteria entered.

Demo Example: Fillet

3. The following customer line-item options are available.

- a. **Details:** View Customer Profile Details and Invoice/Workorder History.
- b. **Edit:** Edit/Update Customer Profile
- c. **Delete:** Remove Customer Profile if they do not have invoices.
- d. **Statement:** Vie/Print Customer's Statement

The screenshot shows a web interface for a 'Customer Database'. At the top, there are three buttons: 'Create New', 'Merge Customer', and 'Customer Types'. Below these is a search bar containing the text 'fillet' and a 'Search' button. An orange arrow points to the 'Search' button. Below the search bar is a table with the following columns: 'First Name', 'Last Name', 'Company', 'Cell Phone', 'Email', 'City', and 'Customer Type'. The table contains one row with the following data: 'Fred', 'Fillet', (blank), '817-789-4568', (blank), 'Fort Worth', and (blank). To the right of this row are four buttons: 'Details', 'Edit', 'Delete', and 'Statement'. An orange arrow points to the 'Details' button. In the bottom right corner of the interface, it says 'Page: 1'.

Customer Database - Search: Fred Fillet

Details – Invoice History

Path: Touch/Click **Customer Database** on the Main Menu. **Type First/Last/Partial Name, Company Name, Phone Number or Customer Type into the Search field.** Touch/Click the **Search** button.

1. Touch/Click the **Details** button to view Customer's Profile which can include Name, Address, Phone, Email, Notes, Preferences, Tax Exempt ID and Invoice History.

The screenshot displays the 'Customer Details' screen. It is divided into several sections: Name, Address, Contact, Notes, Preferences, Business, and Invoice History. The 'Details' label is placed to the right of the Name, Address, and Contact sections. The 'Invoice History' label is placed to the right of the invoice table. The 'Payment' and 'Open' buttons are also labeled.

Invoice #	Revision	Balance Due	Date Created	Payment	Open
402	1	\$0.00	4/17/2019	Payment	Open
389	1	\$0.00	3/19/2019	Payment	Open
363	1	\$0.00	2/17/2019	Payment	Open
361	1	\$0.00	1/30/2019	Payment	Open
360	1	\$0.00	1/29/2019	Payment	Open

Customer Details Screen

2. **Invoice History:** The Customer Details screen includes Invoice History. Each line item contains the Invoice #, Revision #, Balance Due and Date Created. The following button options are available.

- a. **Payment:** Touch/Click on the invoice line item that you would like to **Apply a Payment**. This option will take you directly to the Accept Payment screen.

Note: Go to Payment section for complete instructions on how to take a payment on an invoice with a balance due.

- b. **Open:** Touch/Click on the invoice line that you would like to **Open to View or Edit**. The Editing Workorder window will display and ask you to select one of the following options: **View Only, Full Edit, Price Lock or Partial Edit**. All options will display the Workorder/Invoice window.

Note: Go to the Edit Workorder/Invoice section for full instructions.

- **Demo Example:** View Only Invoice 402- Aqua Blue Ready-Made Frame, One Custom Frame Workorder #309 and a Shipping Fee of \$20.00.

Editing Work Order

<p>Would you like to view the invoice and work orders? (You can view the invoice and work orders but not make any changes)</p>	<p>Would you like to do a full edit? (Allows you to change framing order components, add / remove items, and updates pricing)</p>	<p>Would you like to do a price lock edit? (Allows you to change framing order components, add / remove items, but does not update pricing)</p>	<p>Would you like to do a partial edit? (Allows you to update work order comments, title, art conditions, due date, art type. This edit does not change pricing or framing order components)</p>
View Only	Full Edit	Price Lock	Partial Edit

Invoice		402 (Revision 1)		<input type="checkbox"/> Tax Exempt?			Customer: Fred Fillet			
No.	Qty	SKU	Description	Unit Price	Unit Discount	Total Discount	Subtotal	Extended	Tax Exempt	
1	1	B1234	Aqua Blue Ready Made Frame 8x10	\$25.00	0	\$0.00	\$25.00	\$26.75	<input type="checkbox"/>	✎
2	1	WO# 399	Fall Day	\$909.84	0	\$0.00	\$909.84	\$973.53	<input type="checkbox"/>	✎
3	1		Shipping	20	0	\$0.00	\$20.00	\$21.40	<input type="checkbox"/>	✎
								Total Unit Price	\$954.84	
								Total Discount	\$0.00	
								Subtotal	\$954.84	
								Total Tax	\$66.84	
								Grand Total	\$1,021.68	

Customer Database - Open Invoice – View Only

- To view the workorder details, Touch/Click the **Edit Icon** on the line item that contains the Workorder. The workorder will open in the screen below the invoice window.

Invoice 402 (Revision 1)

No.	Qty	SKU	Description	Unit Price	Unit Discount	Total Discount	Subtotal	Extended	Tax Exempt
1	1	B1234	Aqua Blue Ready Made Frame 8x10	\$25.00	0	\$0.00	\$25.00	\$26.75	<input type="checkbox"/>
2	1	WO# 399	Fall Day	\$909.84	\$0.00	\$0.00	\$909.84	\$909.84	<input checked="" type="checkbox"/>
3	1		Shipping	20	0	\$0.00	\$20.00	\$21.40	<input type="checkbox"/>

Tax Exempt? Customer: Fred Fillet

Total Unit Price \$954.84
Total Discount \$0.00
Subtotal \$954.84
Total Tax \$3.15
Grand Total \$957.99

Description Fall Day Art Condition Other **Due Date:** 5/1/2019

Image Size **Height** 18 **Width** 20 **Finished Size:** 27.75 X 29.75

Mouldings 1: R124187 L 11 1/2 2:

Mats **Top** 4 **Bottom** 4 **Left** 4 **Right** 4

Mats / Fillets / Fabrics

1: C1061	
2: R121	Reveal 3/8
3: C1085	Reveal 1/2
4: 	Reveal 1/2

Totals...

Mouldings \$289.34
Glass \$200.03
Mats \$60.32
Fabric
Fillet \$59.75
Mounting \$24.94
Stretching
Special \$14.50
Engraving
Fitting On \$35.96
Art + \$225.00
Misc +
Subtotal \$909.84

Manager Override +

Update Invoice Upload Image

Conservation Clear Acrylic Museum Glass Conservation Reflection Control Conservation Clear No Glazing Other Glazing ...

Specials

<input type="checkbox"/> 1 HrLbr	<input type="checkbox"/> 1/2HrLbr	<input type="checkbox"/> 2 HrLbr
<input type="checkbox"/> 4 HrLbr	<input type="checkbox"/> 7 HrLbr	<input type="checkbox"/> V-Groove
<input type="checkbox"/> Xtra-FIT	<input type="checkbox"/> ShadowBox	<input type="checkbox"/> ShrinkWp
<input type="checkbox"/> SpclCuts	<input type="checkbox"/> TieredMt	<input type="checkbox"/> PaintBvl
<input checked="" type="checkbox"/> Rev Bev 1	<input type="checkbox"/> RUSH	<input type="checkbox"/> Fr Line
<input type="checkbox"/> Fr Tape	<input type="checkbox"/> French	<input type="checkbox"/> GlassEth
<input type="checkbox"/> GLSpacer	<input type="checkbox"/> Cust Fra	<input type="checkbox"/> Cust Mat
<input type="checkbox"/> FCSpacer		

W / O Comments

Customer Database – Open – View Only Workorder/Invoice

Edit Profile Details

Path: Touch/Click **Customer Database** on the Main Menu. **Type First/Last/Partial Name, Company Name, Phone Number or Customer Type into the Search field.** Touch/Click the **Search** button.

1. Touch/Click the **Edit** button to Edit/Update Customer's Profile Details.

Customer Database

Create New Customer Types

fillet Search

First Name	Last Name	Company	Phone	Email	City	Customer Type	
Fred	Fillet		817-789-4568		Fort Worth		 Details Edit Delete

Customer Database - Edit Customer Profile

- a. Touch/Click field to **Edit/Update**. – Backspace current data to remove. – Type new data.

Tip: You can add an auto discount for special customers in the discount field.

Add New Customer Back

First Name: Fred Last Name: Fillet Customer Type: Select

Phone: 817-789-4568 Street: 1234 Picture Park Drive Tax Id: []

Email: example@email.com Street Con't: [] Discount %: 0

Cell: 555-555-5555 City: Fort Worth Do Not Call: [] Do Not Email: []

Work: 555-555-5555 State: TX Do Not Bill: [] Do Not Mail: []

Fax: 555-555-5555 Zip: 76179

Alert: []

Notes: []

Company Name: [] City: []

Business Street: [] State: []

Business Street Con't: [] Business Zip: []

Save

Customer Database – Edit Customer Profile

- b. Touch/Click the **Save** button.

Delete Profile

Path: Touch/Click **Customer Database** on the Main Menu. **Type First/Last/Partial Name, Company Name, Phone Number or Customer Type into the Search field.** Touch/Click the **Search** button.

1. Touch/Click the **Delete** button on the desired customer line item to remove the Customers Profile.

The screenshot shows the 'Customer Database' interface. At the top right, there are buttons for 'Create New' and 'Customer Types'. Below these is a search bar containing the text 'fillet' and a 'Search' button. A table below the search bar lists customer information. The table has columns for 'First Name', 'Last Name', 'Company', 'Phone', 'Email', 'City', and 'Customer Type'. The first row contains the data: 'Fred', 'Fillet', 'Company', '817-789-4568', 'Email', 'Fort Worth', and 'Customer Type'. To the right of the table, there are three buttons: 'Details', 'Edit', and 'Delete'. A red arrow points to the 'Delete' button.

First Name	Last Name	Company	Phone	Email	City	Customer Type
Fred	Fillet		817-789-4568		Fort Worth	

Customer Database - Delete Customer Profile

The screenshot shows the 'Delete Customer' confirmation screen. At the top, it says 'Delete Customer' and 'Are you sure you want to delete this customer?'. Below this, there are sections for 'Name', 'Address', 'Contact', 'Notes', 'Preferences', 'Business', and 'Invoice History'. The 'Name' section shows 'Bill' and 'Bevet'. The 'Address' section shows '1234 Picture Park Place', 'Fort TX 76179', and 'Worth'. The 'Contact' section shows 'Home Phone 8174567412', 'Work Phone', 'Cell Fax', 'Phone Number', 'Email', and 'Address'. The 'Preferences' section has radio buttons for 'Do not email', 'Do not mail', 'Do not call', and 'Do not bill', along with 'Day of birth -1' and 'Month of birth -1'. The 'Business' section shows '(Tax Id:)' and '..'. The 'Invoice History' section has a table with columns 'Invoice #', 'Revision', 'Balance Due', and 'Date Created'. At the bottom, there are two buttons: 'Back to List' and 'Delete'.

Delete Customer

Note: You cannot delete a customer who has invoices/workorders.

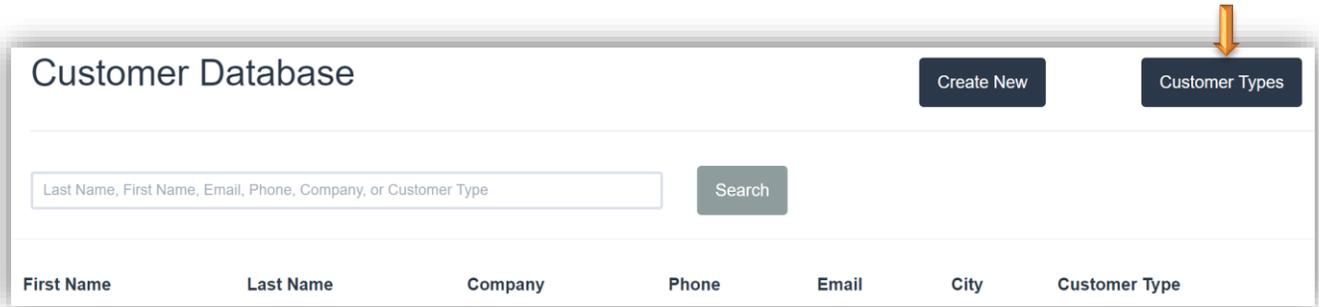
*****You cannot delete a customer that has invoices**

Customer Type

Add customer types such as : *Corporate, Interior Designer, Artist, etc.*

Create New

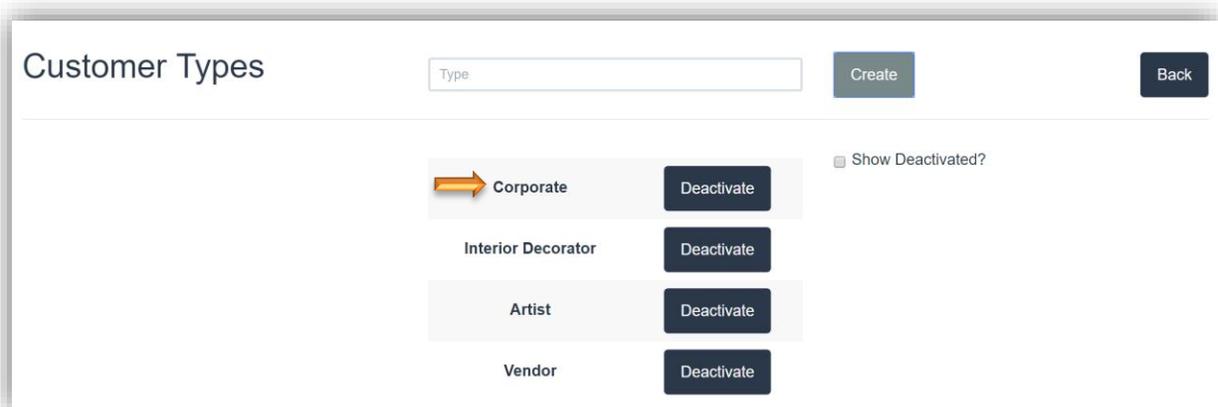
1. Touch/Click **Customer Database** on the Main Menu. Touch/Click **Customer Types** button located in the upper right corner screen.



2. Type **Customer Type Name** in the Type field. Demo Example: *Corporate*.



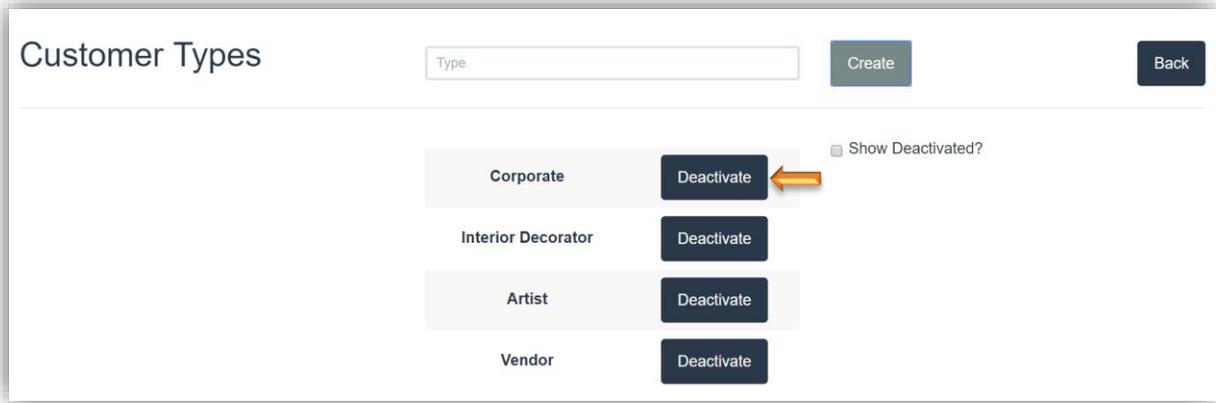
3. Touch/Click **Create** button.



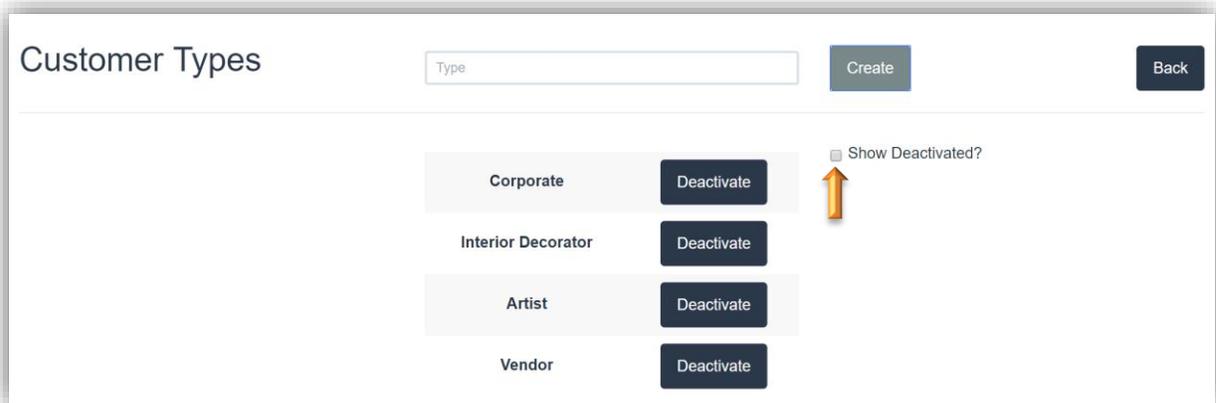
Deactivate/Activate Customer Type

Path: Touch/Click **Customer Database** on the main menu. Touch/Click **Customer Types** button.

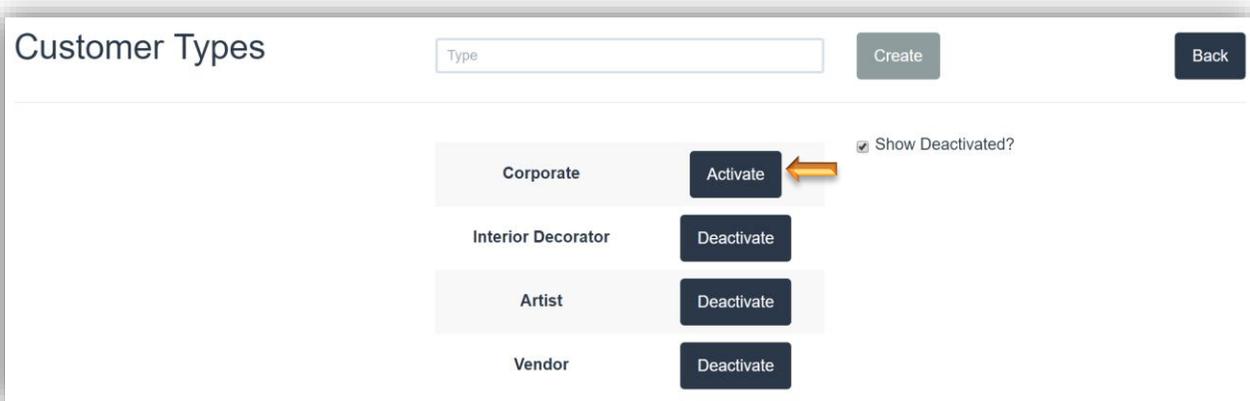
1. Deactivate:
 - a. Touch/Click the **Deactivate** button on the desired line item.



2. Activate:
 - a. Touch/Click Show **Deactivated Field Box**.



- b. The Deactivated Customer Type will display in the list. Touch/Click the **Activate** button on the appropriate line item.



Customer Statement of Account & Packing List

Path: Touch/Click **Customer Database** on the Main Menu. **Type First/Last/Partial Name, Company Name, Phone Number or Customer Type into the Search field.**

Statement of Account

1. Touch/Click **Statement** button on customer line item.
2. Filter by Date:
 - a. Select **True** – Select **Start/End Date**
 - b. Select **False (Default)** – Dates are not applicable.
3. Filter by invoice. Include these invoices. Default is **Select All**. Touch/Click **Down Arrow** to **select specific invoices**.
4. Print: Touch/Click **Down Arrow**. Select **Statement of Account** or **Packing List**.
5. Touch/Click **View Report**.

Note: Filters selected in below customer statement: **True, 05/01/21 – 05/17/21, Select All and Statement of Account.**

6. The statement will list the **Invoices** selected along with the **Return Address** and **Customer Address** which will display in a double window envelope.

Filter By
Date: True False
Range: _____

Include these invoices:

Start Date:

End Date:

Training Gallery
1234 LifeSaver Lane
Holly Springs, GA 30142
(770) 123-5678

Statement of Account
May 17, 2021

Customer:

Frannie Frame 1234 Bevel Blvd. Fort Worth, TX 76179	Home: (817) 593-5899 Email: FF@gmail.com
---	---

Invoice #	Inv Date	Description	Order Total	Payments	Balance
596	5/17/2021	Abstract Bouquet	\$638.64	\$638.64	\$0.00
597	5/17/2021	Fishing At Sunset	\$426.83	\$213.41	\$213.42
				Total Payments:	\$852.05
				Remaining Balance:	\$213.42
				Total Account Balance:	\$213.42

Customer Statement of Account

Path: Touch/Click **Customer Database** on the Main Menu. **Type First/Last/Partial Name, Company Name, Phone Number or Customer Type** into the Search field.

Packing List

1. Touch/Click **Statement** button on customer line item.
2. Filter by Date:
 - a. Select **True** – Select **Start/End Date**
 - b. Select **False (Default)** – Dates are not applicable.
3. Filter by invoice. Include these invoices. Default is **Select All**. Touch/Click **Down Arrow** to **select specific invoices**.
4. Print: Touch/Click **Down Arrow**. Select **Statement of Account** or **Packing List**.
5. Touch/Click **View Report**.

Note: Filters selected in below packing list: True, 05/01/21 – 05/17/21, Invoice 596 and Packing List.

6. The Packing List includes the From Address, Customer Address, Invoice Number and Workorder Description.

Back

Filter By
 Date Range: True False
 Start Date: 5/1/2021 End Date: 5/17/2021 View
 Include these invoices: Invoice: 596 - 05/17/2021 - Total: € Print: Packing List

1 of 1 Page Width Find | Next Page 1 of 1

Training Gallery
 1234 LifeSaver Lane
 Holly Springs, GA 30142
 (770) 123-5678

Packing List
 May 20, 2021

Customer:
 Frannie Frame
 1234 Bevel Blvd.
 Fort Worth, TX 76179

Invoice #	Description
596	Abstract Bouquet

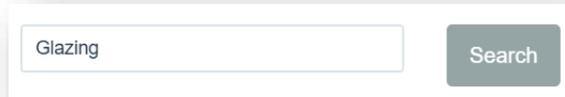
Packing List

Merge Customer

1. Touch/Click **Customer Database**
2. Touch/Click the *Merge Customer* button.

Demo Example: Gladys Glazing has 2 records with differing addresses. Move her record from her old address to her current address.

3. Type **First/Last Name** in the left bottom Search field. Touch/Click **Search**.

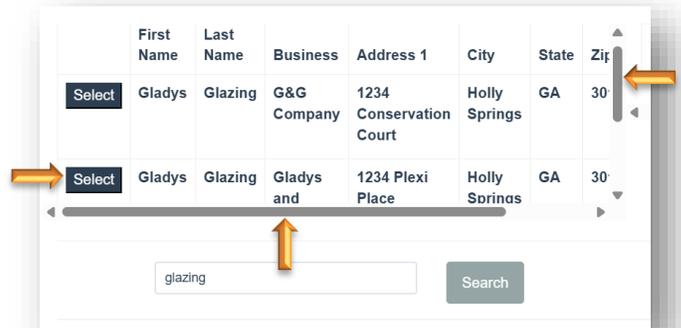


A search interface with a text input field containing the word "Glazing" and a grey "Search" button to its right.

Customer Database - Search

4. In the drop down list click and drag the up/down and left/right scroll bar to find the specific customer in the list that you want to copy the orders from. Touch/Click the **Select** button on their line item.

Demo Example: Gladys Glazing on Plexi Place, Holly Springs, GA.



A table with columns: First Name, Last Name, Business, Address 1, City, State, Zip. Below the table is a search field with "glazing" and a "Search" button. Orange arrows point to the "Select" buttons and the scroll bars.

	First Name	Last Name	Business	Address 1	City	State	Zip
Select	Gladys	Glazing	G&G Company	1234 Conservation Court	Holly Springs	GA	30
Select	Gladys	Glazing	Gladys and	1234 Plexi Place	Holly Springs	GA	30

Customer Database - Merge

5. Type **First/Last Name** in the right bottom Search field. Touch/Click **Search**.

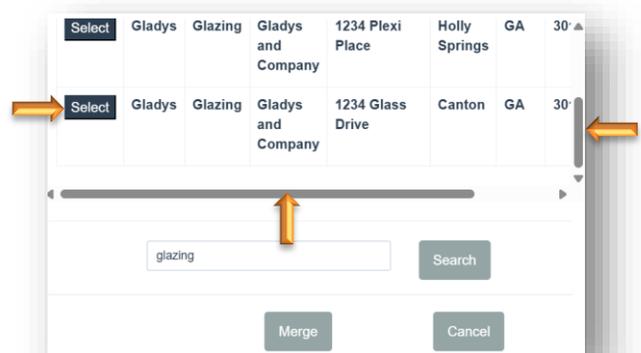


A search interface with a text input field containing the word "Glazing" and a grey "Search" button to its right.

Customer Database - Search

5. In the drop down list click and drag the up/down and left/right scroll bar to find the specific customer in the list that you want to move the orders to. Touch/Click the **Select** button on their line item.

Demo Example: Gladys Glazing on Glass Drive, Canton, GA.



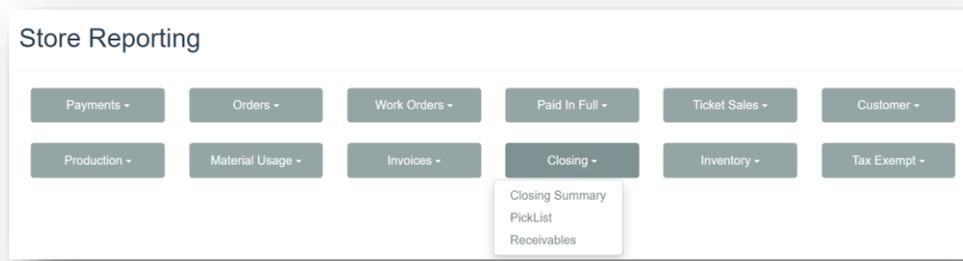
A table with columns: First Name, Last Name, Business, Address 1, City, State, Zip. Below the table is a search field with "glazing" and a "Search" button. At the bottom are "Merge" and "Cancel" buttons. Orange arrows point to the "Select" buttons and the scroll bars.

Select	Gladys	Glazing	Gladys and Company	1234 Plexi Place	Holly Springs	GA	30
Select	Gladys	Glazing	Gladys and Company	1234 Glass Drive	Canton	GA	30

Store Reports

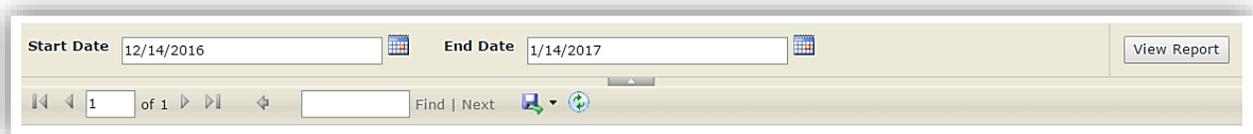
How to navigate, process, export and print a report.

1. **Navigate:** Touch/Click the **Reports** button on the main menu to access.
2. Touch/Click the **Report Type** drop down arrow. Touch/Click the **Report Name** in the list.



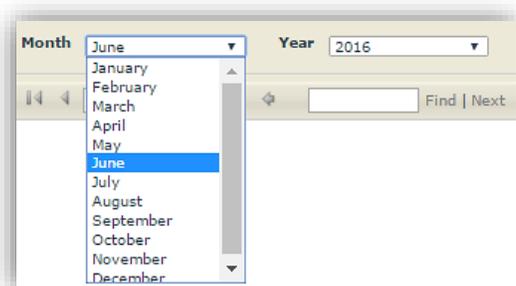
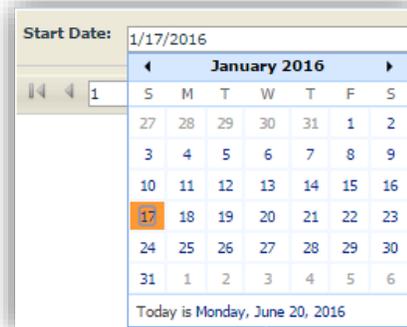
Store Reporting - Select Report

3. Report functions/options/filters are located above the Report Title in the **Gray Tool Bar**. They will vary depending on the type of report you are running.



Report Tool Bar – Will vary depending on report type.

4. Select **Report Start/End Dates:** Will vary depending on report.
 - a. Touch/Click on **Calendar Icon** – Touch/Click **Day/Date** – Touch/Click **Previous/Next Arrows** located to the right and left of the Month Name to access a different month if needed.
 - b. **Select Month/Year:** Touch/Click Month drop down arrow. Touch/Click **Month.** – Touch/Click Year drop down arrow. Touch/Click **Year.**

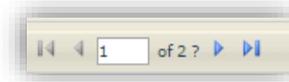


5. **Process the Report:** Touch/Click the **View Report** button or the **Refresh** button. The report will display on the screen.



6. It may be necessary to Touch/Click and Drag the vertical and horizontal **Slider Bars** to view report content.

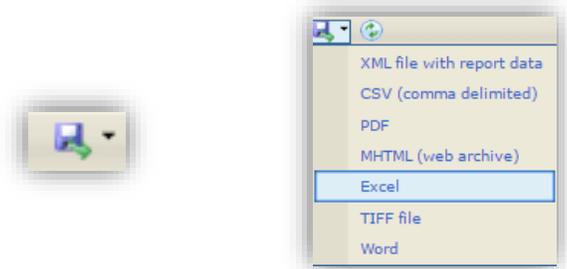
7. If the Report contains multiple pages Touch/Click the **Previous/Next Arrows**.



8. **Search:** Find Text in the report. Touch/Click **Search** field. Type **Word/Number** into the field. Touch/Click **Find**. Touch/Click **Next** to move to the following place the word/number appears in the document.



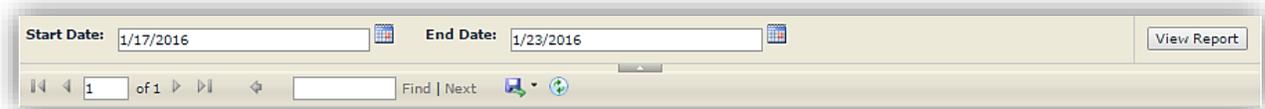
9. **Export Report:** Touch/Click the **Export Icon** drop down arrow. Touch/Click the **Application/File Type** that you would like to use for the export. **Save Report** once it has opened in the application/file location you selected. The report can now be **Printed** or **Emailed**.



10. **Print:** The following reports now include a Print button: Delivered, Undelivered, Salesperson, Production Log and all Material Usage Reports.



Note: Start/End dates can be edited after initial date selection. Touch/Click the Refresh Icon to process the new date range.



Reports Tool Bar

11. Touch/Click the **Back** button to return to the Store Reporting screen or **Home** button to exit.

Report Types

Payment Reports

Payments ▾

- Payment Summary
- Payment Summary Monthly
- LifeSaver Payments Payouts
- Write-off Summary

Payment Summary Report: Lists payments taken for the date range entered by Date, Total Payment, Pay Type, Invoice #, Received on Account, Customer Name, Order Amount, Order Date, Labor, Material, Subtotal, Tax and Total. Will also display total dollar amounts in each category and by payment type.

1. Touch/Click the **Reports** button. Touch/Click the **Payments button**. Touch/Click **Payment Summary**. The report processes and defaults to the last 30 days.
2. Edit Date Range: Touch/Click the **Start/End date Calendar** icons. Touch/Click **New Date/Day**. Touch/Click **View Report** button to process new date selections.

Back

Start Date: 1/17/2016 End Date: 1/23/2016 View Report

1 of 1 Find | Next

Run on: 6/20/2016 12:22:39 PM

Payment Summary Report
for 1/17/2016 to 1/23/2016
Training Gallery

Payments Were Applied to These Orders

Payment Date	Payment	Type	Method	Invoice #	Revision #	ROA*	Customer	Order Amount	Order Date	Labor	Material	Subtotal	Tax	Total
1/20/2016 1:54 PM	\$409.37	Payment	Cash	107	1		Fred Fillet	\$409.37	1/20/2016	\$18.49	\$364.10	\$382.59	\$28.78	\$409.37
1/20/2016 2:34 PM	\$324.83	Payment	Cash	108	1		Jane Doe	\$324.83	1/20/2016	\$18.49	\$285.09	\$303.58	\$21.25	\$324.83
1/20/2016 2:52 PM	\$100.00	Payment	Cash	109	1	\$100.00	Art Artist	\$447.21	1/20/2016	\$4.23	\$89.23	\$93.48	\$9.54	\$100.00
Total:	\$834.20									\$41.21	\$738.42	\$779.63	\$54.57	\$834.20

*ROA = Received On Account

Summary of Payment by Type: Cash \$834.20

Payment Summary Monthly: Payments received for the Month/Year selected. Report categories per day/date: Date, Cash, Check, Write Off, Retail, Tax, Total. The report excludes write-offs.

1. Touch/Click the **Reports** button. Touch/Click the **Payments button**. Touch/Click **Payment Summary Monthly**. The report processes and defaults to the **Current Month and Year**.
2. Edit Report Date: Touch/Click **Month and Year drop down arrow** to select an alternate month/year. Touch/Click **View Report** button to process new date selections.

Month: April Year: 2016 View Report

1 of 1 Find | Next

Run on: 6/21/2016 1:19:05 PM

Payments Received Summary Report
for the Month of April 2016
Training Gallery

Pro-Rated Sales Summary
Excluding Write-Offs

Date	Cash	Check	Write-Off	Retail	Tax	Total
4/6/2016	\$1196.46	\$0.00	\$0.00	\$1118.19	\$78.27	\$1196.46
4/8/2016	\$1224.14	\$0.00	\$0.00	\$1144.06	\$80.08	\$1224.14
4/11/2016	\$0.00	\$1440.77	\$0.00	\$1346.51	\$94.26	\$1440.77
4/16/2016	\$4750.43	\$0.00	\$0.00	\$4439.65	\$310.78	\$4750.43
4/25/2016	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4/27/2016	\$1153.12	\$0.00	\$0.00	\$1077.69	\$75.44	\$1153.12
4/30/2016	\$555.28	\$0.00	\$0.00	\$518.94	\$36.32	\$555.28
Totals:	\$8879.41	\$1440.77	\$0.00	\$9645.03	\$675.15	\$10320.18

Page 1 of 1

LifeSaver Payments Payout: *If you have LifeSaver Payments integrated credit card processing this will list the transfer of funds to your stores's bank account for the time period selected.*

1. Touch/Click the **Reports** button. Touch/Click the **Payments** button. Touch/Click **LifeSaver Payments Payout** button.
2. Touch/Click the Start Date Calendar icon. Select **Start Date**. Touch/Click the End Date Calendar icon. Select **End Date**.

Note: Use the Up/Down arrows in the calendar to navigate to the desired month.

3. Touch/Click the **Get Payment Report**.

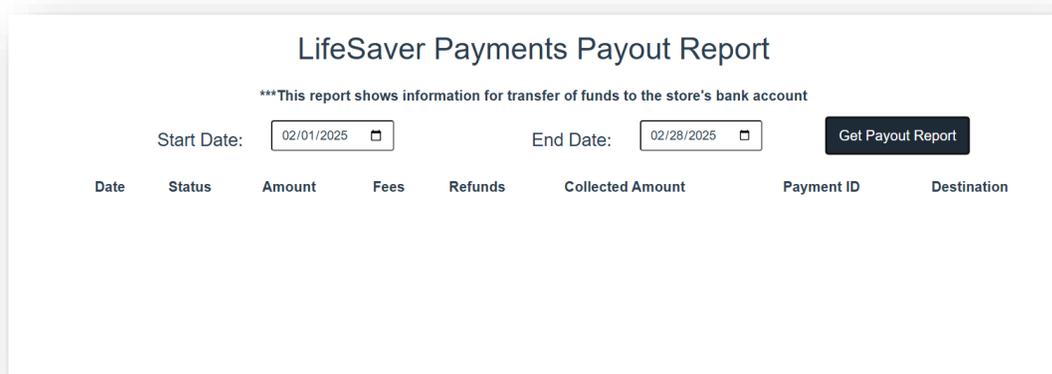


Start Date: 02/01/2025  End Date: 02/28/2025  **Get Payout Report**

LifeSaver Payments Payouts – Select Start/End Date

4. Your payouts for the selected time period will list.

Note: *My training Cloud program does not have “Live” LifeSaver Payments, so there are no payouts listed in my report.*



LifeSaver Payments Payout Report

***This report shows information for transfer of funds to the store's bank account

Start Date: 02/01/2025  End Date: 02/28/2025  **Get Payout Report**

Date	Status	Amount	Fees	Refunds	Collected Amount	Payment ID	Destination
------	--------	--------	------	---------	------------------	------------	-------------

LifeSaver Payments Payout Report

Write-off Summary: *The report will list the invoices that have been wrote-off for the time period selected.*

1. Touch/Click the **Reports** button. Touch/Click the **Payments** button. Touch/Click **Write-off Summary**.
2. The report will default to the past 7 days. Touch/Click **View Report** to display.

- To select alternative dates. Touch/Click the Start Date calendar icon. Select **Start Date**. Touch/Click the End Date calendar icon. Select **End Date**.
- Touch/Click the **View Report** button.
- The report will list the Transaction Date, Write-off Amount, Invoice #, Revision #, Customer Name, Order Amount, Order Date, Labor Amount, Material Amount, Subtotal, Tax, Total Amount. It will also list the total of all line items.

Start Date: 3/7/2025 End Date: 3/14/2025 View Report

1 of 1 Page Width Find | Next

Write-Off Summary Report Run on: 3/14/2025 2:59:15 PM

for 3/7/2025 to 3/14/2025
Training Gallery

Date	Write-Off	Salesperson	Write-Off Applied to These Orders									
			Invoice #	Revision #	Customer	Order Amount	Order Date	Labor	Material	Subtotal	Tax	Total
3/14/2025 2:58 PM	\$537.50	Tiffany Trainee	721	1	Gladys and Company - Gladys Glazing	\$537.50	3/14/2025	\$0.00	\$537.50	\$537.50	\$0.00	\$537.50
Total:	\$537.50							\$0.00	\$537.50	\$537.50	\$0.00	\$537.50

Write-Off Summary Report

Orders

Orders ▾

- Order Summary
- Order Summary Monthly
- Delivered Order Summary
- Undelivered Order Summary
- Voided Order Summary
- Quote Summary
- Work Order Summary

Order Summary Report: *The report displays the New Invoices Summary (Top Half) and the Revised Invoices Summary individually (Bottom half). Lists each order by invoice number and breakdowns each invoice into the following categories: Date – Invoice # - Customer Name – Revision # - Line Item – Salesperson - Labor \$ - Material \$ - Subtotal, Tax and Total amount of each invoice. Will also total dollar amounts in the following categories: Labor – Material – Subtotal – Tax and Total.*

1. Touch/Click **Reports** button. Touch/Click **Order** button. Touch/Click **Order Summary**. The report will process and defaults to the last 7 days date range.
2. Edit Default Dates: Touch/Click **Start/End date calendar icons** to edit date range. Touch/Click **View Report** button to process new date selections.

Start Date: 4/24/2016 End Date: 4/30/2016 View Report

1 of 1 Find | Next

Run on: 6/21/2016 1:35:35 PM

Order Summary Report for 4/24/2016 to 4/30/2016 Training Gallery

Date	Invoice #	Customer	Revision #	Line Item	Sales Person	Labor	Material	Subtotal	Tax	Total
4/25/2016	119	Betty Bevel	1		Tristan Trainee	\$66.70	\$870.79	\$937.49	\$65.63	\$1003.12
4/27/2016	120	Unassigned Unassigned	1		Tristan Trainee	\$43.56	\$349.60	\$393.16	\$27.52	\$420.68
	121	Fred Fillet	1		Tristan Trainee	\$0.00	\$20.00	\$20.00	\$1.40	\$21.40
	122	Fanny Frame	1		Tristan Trainee	\$0.00	\$250.00	\$250.00	\$17.50	\$267.50
	123	Fanny Frame	1		Tristan Trainee	\$0.00	\$250.00	\$250.00	\$17.50	\$267.50
	124	Betty Bevel	1		Tristan Trainee	\$31.82	\$321.27	\$353.09	\$24.72	\$377.81
4/29/2016	125	Margie Moulding	1		Tristan Trainee	\$95.57	\$812.14	\$907.71	\$63.54	\$971.25
4/30/2016	126	Fred Fillet	1		Tristan Trainee	\$117.30	\$401.64	\$518.94	\$36.32	\$555.26
New Invoices:						\$354.95	\$3275.44	\$3630.39	\$254.13	\$3884.52
Revisions:										
Date	Invoice #	Customer	Revision #	Line Item	Sales Person	Labor	Material	Subtotal	Tax	Total
4/27/2016	119	Betty Bevel	1		Tristan Trainee	-\$66.70	-\$870.79	-\$937.49	-\$65.63	-\$1003.12
			2		Tristan Trainee	\$65.52	\$882.28	\$927.80	\$64.95	\$992.75
Cumulative Difference:						-\$1.18	-\$8.51	-\$9.69	-\$0.68	-\$10.37
Invoice Revisions:						-\$1.18	-\$8.51	-\$9.69	-\$0.68	-\$10.37
Total:						\$353.77	\$3266.93	\$3620.70	\$253.45	\$3874.15

Order Summary Monthly

1. Touch/Click **Reports** button. Touch/Click **Order** button. Touch/Click **Order Summary Monthly**. The report will process and default to the current month's date range.
2. Edit Default Dates: Touch/Click **Month and Year drop down arrow** to select a different month/year. Touch/Click **View Report** button to process new date selections.

Month: April Year: 2016 View Report

1 of 1 Find | Next

Run on: 6/21/2016 1:46:28 PM

Orders Received Summary Report for the Month of April 2016 Training Gallery

Date	Labor	Material	Subtotal	Tax	Total
4/8/2016	\$327.33	\$1214.50	\$1541.83	\$107.92	\$1649.75
4/11/2016	\$356.95	\$989.56	\$1346.51	\$94.26	\$1440.77
4/16/2016	\$1764.57	\$2690.08	\$4454.65	\$311.83	\$4766.48
4/25/2016	\$66.70	\$870.79	\$937.49	\$65.63	\$1003.12
4/27/2016	\$74.20	\$1182.36	\$1256.56	\$87.96	\$1344.52
4/29/2016	\$95.57	\$812.14	\$907.71	\$63.54	\$971.25
4/30/2016	\$117.30	\$401.64	\$518.94	\$36.32	\$555.26
Totals:	\$2802.62	\$8161.07	\$10963.69	\$767.46	\$11731.15

Page 1 of 1

Delivered Order Summary Report: Displays orders that have been delivered to the customer for the date range selected. Report categories: Delivery Date, Invoice #, Customer Name, Revised #, Sales Person, Labor, Material, Subtotal, Tax and Total. Orders must be updated to “Delivered” status in the Production Menu upon customer pickup in order to list on the report.

1. Touch/Click **Reports** button. Touch/Click **Order** button. Touch/Click **Delivered Order Summary**. The report will process and default to the current month’s date range.
2. Edit Default Dates: Touch/Click **Month and Year drop down arrow** to select a different month/year. Touch/Click **View Report** button to process new date selections.

Tip: Touch/Click  located to the left of the Revision # to view workorder number(s) included in the invoice.

Print

Start Date End Date View Report

1 of 1 Find | Next

Delivered Order Summary Report

for 6/18/2017 to 6/24/2017
Training Gallery

Delivery Date	Invoice #	Customer	Revision #	WO #	Sales Person	Labor	Material
6/21/2017	76	Bill Bevel	 2	[Expand to View] 243	Tristan Trainee	\$36.72	\$640.00
	196	Unassigned Unassigned	 1	[Expand to View]	Tristan Trainee	\$0.00	\$25.00
	197	Betty Bevel	 2	[Expand to View]	Tristan Trainee	\$46.62	\$636.70
	198	Gladys Glazing	 1	[Expand to View]	Tristan Trainee	\$0.00	\$350.00
	200	Betty Bevel	 1	[Expand to View]	Tristan Trainee	\$26.04	\$804.50
	201	Bill Bevel	 1	[Expand to View]	Tristan Trainee	\$0.00	\$25.00
	202	Gladys Glazing	 1	[Expand to View]	Tristan Trainee	\$55.57	\$855.00
	203	Fanny Frame	 1	[Expand to View]	Tristan Trainee	\$32.56	\$467.00
	204	Fred Fillet	 1	[Expand to View]	Tristan Trainee	\$74.10	\$659.90
	205	Wally Wall	 1	[Expand to View]	Tristan Trainee	\$105.15	\$827.20
TOTALS:						\$376.76	\$5290.41

Undelivered Order Summary Report: Displays orders that have not been delivered to the customer for the date range selected. Report categories: Date Ordered, Invoice #, Workorder #, Location, Sales Person, Customer Name, Phone #, Subtotal, Tax, Total and Balance.

1. Touch/Click **Reports** button. Touch/Click **Order** button. Touch/Click **Undelivered Order Summary**. The report will process and default to your Cloud program start date and end with the report processing date.
2. Edit Default Dates: Touch/Click **Start/End date calendar icons** to edit date range. Touch/Click **View Report** button to process new date selections.

Tip: A workorder that has been delivered to the customer can list on the undelivered report if the status was not updated to delivered in the production menu upon customer pickup.

Date Ordered	Invoice #	W/O #	Location	Status	Sales Person	Customer Name	Phone	Subt
1/24/2017	206	247		OnOrder	tristantrainee	Bob Bevel		\$76
1/24/2017	207	248		OnOrder	tristantrainee	Fanny Frame		\$84
1/24/2017	208	249		OnOrder	tristantrainee	Fanny Frame		\$82
1/24/2017	209	250		OnOrder	tristantrainee	Bob Bevel		\$111
1/24/2017	210	251		OnOrder	tristantrainee	Fred Fillet		\$88
1/25/2017	211	252		OnOrder	tristantrainee	Fred Fillet		\$93
1/25/2017	212	253		OnOrder	tristantrainee	Betty Bevel		\$104
TOTALS:								\$6402

Quote Summary: The report displays the following depending on the filters selected: Open Quotes and Quotes that have been turned into live invoices.

1. Touch/Click **Reports** button. Touch/Click **Order** button. Touch/Click **Quote Summary**. The report will process and default to the last 7 days and will display both open quotes and quotes that have gone live. Each line item will contain the following categories: Date, Quote Number, Customer name, Revision Number, Sales Person Name, Subtotal, Discount, Tax & Total. If the quote has gone live the following additional categories will list on the line item: Date Activated, Invoice Number, Current Revision #, Current Total & Final Difference. The report will also total all quotes displayed. Both the start/end date and report filters can be edited.
2. Edit Start Date: Touch/Click **Calendar Icon**. Touch/Click **New Starting Date**.

3. Edit End Date. Touch/Click the **Calendar Icon**. Touch/Click **New Ending Date**.
4. Select Filter. Touch/Click **Horizontal Slider Arrow** till you reach the far-right side of the report. Touch/Click **Filter Drop Down Arrow**. Touch/Click **Desired Filter**.
5. Touch/Click **View Report** to process.

Back

End Date: 1/5/2024 Filter: Include quotes that have been turned into live invoices View Report

1 of 1 Page Width Find | Next

Run on: 1/5/2024 1:03:55 PM

Quote Summary Report

for 12/29/2023 to 1/5/2024
Training Gallery

Date	Quote #	Customer	Revision #	Sales Person	Subtotal	Discount	Tax	Total	Date Activated	Invoice #	Current Revision	Current Total	Final Difference
1/4/2024	45	Joe Customer	1	Tiffany Trainee	\$617.31	\$0.00	\$43.21	\$660.52	1/4/2024	006	2	\$660.52	\$0.00
1/4/2024	46	Charlie Brown	1	Tiffany Trainee	\$884.63	\$88.46	\$0.00	\$778.17					
Total:					\$1481.94	\$86.46	\$43.21	\$1438.69				\$660.52	\$0.00

Workorder Summary Report: View workorder summary details for the time period selected. The report defaults to today's date. The report does not include invoices.

1. Touch/Click **Reports**. Touch/Click **Orders**. Touch/Click **Workorder Summary**.
2. The report defaults to today's date. To select alternative dates. Touch/Click the Start Date calendar icon. Select **Start Date**. Touch/Click the End Date calendar icon. Select **End Date**.
3. Touch/Click **View Report**.
4. The line item categories are as follows: Workorder Date. Invoice #, Customer Name, Workorder #, Revision #, Salesperson, Labor \$, Material \$, Subtotal, Tax and Total Amount.
5. The total amounts lists for all workorders and it also lists the average amounts for the time period selected.
6. If there were any revised workorders during the time period selected, they will list in the 2nd half of the report. They will contain the same categories, totals and averages.
7. The totals for all workorders including revised workorders will list on the last line item on the report.

Tip: Use scroll bars if needed to view entire report.

Start Date: 3/1/2025 End Date: 3/14/2025 View Report

1 of 1 Page Width Find | Next

Work Order Summary Report

Run on: 3/14/2025 3:30:02 PM

Work Orders only. See Order Summary Report for Invoice totals.
for 3/1/2025 to 3/14/2025
Training Gallery

Date	Invoice #	Customer	WO #	Revision #	Sales Person	Labor	Material	Subtotal	Tax	Total
3/7/2025	716	Bob Bevel	635	1	Tiffany Trainee	\$24.42	\$336.06	\$360.48	\$25.23	\$385.71
3/12/2025	717	Teddy Bear	636	1	Tiffany Trainee	\$39.96	\$878.29	\$918.25	\$0.00	\$918.25
New WO Totals:						\$64.38	\$1214.35	\$1278.73	\$25.23	\$1303.96
New WO Averages:						\$32.19	\$607.18	\$639.37	\$12.62	\$651.98
Revisions:										
Date	Invoice #	Customer	WO #	Revision #	Sales Person	Labor	Material	Subtotal	Tax	Total
3/12/2025	717	Teddy Bear	636	1	Tiffany Trainee	-\$39.96	-\$878.29	-\$918.25	\$0.00	-\$918.25
				2	Tiffany Trainee	\$39.96	\$780.66	\$820.62	\$0.00	\$820.62
Total WO Revisions:						\$0.00	-\$97.63	-\$97.63	\$0.00	-\$97.63
3/13/2025	704	Charlie Brown	626	2	Tiffany Trainee	-\$136.55	-\$2279.40	-\$2415.95	\$0.00	-\$2415.95
Total WO Revisions:						-\$136.55	-\$2279.40	-\$2415.95	\$0.00	-\$2415.95
			627	2	Tiffany Trainee	-\$52.81	-\$249.36	-\$302.17	\$0.00	-\$302.17
Total WO Revisions:						-\$52.81	-\$249.36	-\$302.17	\$0.00	-\$302.17
Revision Totals:						-\$189.36	-\$2626.39	-\$2815.75	\$0.00	-\$2815.75
Revision Averages:						-\$63.12	-\$875.46	-\$938.58	\$0.00	-\$938.58
						Labor	Material	Subtotal	Tax	Total
Total:						-\$124.98	-\$1412.04	-\$1537.02	\$25.23	-\$1511.79

Workorder

Work Orders ▾

Work Order List

Art Copies

Workorder List Report: Will list all work orders for the date range selected with the following headings: Invoice number, Workorder number, Total Number of Line Items on the Invoice, Customer, Art Title, *Status, Sales Price, Discount Amount, Order Date and Due Date. Status must be updated in the Production Menu. If not, the status will always list as "In Progress".

1. Touch/Click **Reports** button. Touch/Click **Workorder** button. Touch/Click **Work Order List**. The report will process and default to the last year.
2. Edit Default Dates: Touch/Click **Start/End date calendar icons** to edit date range. Touch/Click **View Report** button to process new date selections.

3. Report Option

- a. **View/Print Workorder:** Touch/Click on the  to view/print the workorder line item. After printing the workorder it will be necessary to touch/click your browser back arrow to return to the workorder list.

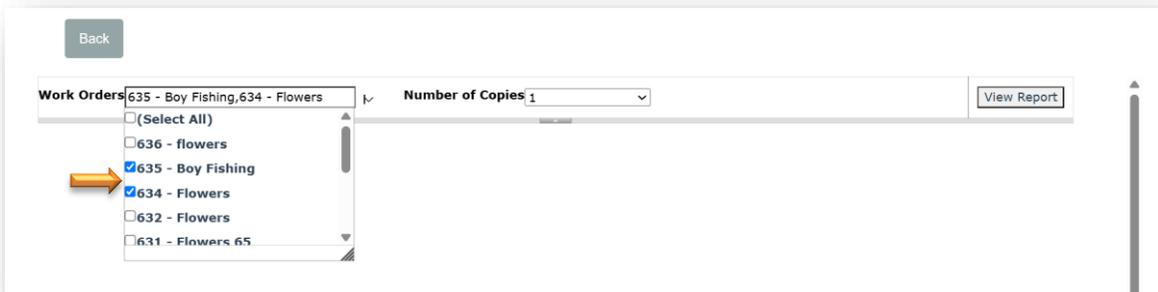
Invoice #	Work Order	Customer	Line Item	Description	Status	Retail	Discount	Order Date	Due Date	View
590	538.1	Fred Framer	1	White Daises	Work Orders To Do	\$612.47	\$0.00	4/20/2021	5/4/2021	
591	539.1	Betty Bevel	1	Boy Fishing	Work Orders To Do	\$398.91	\$0.00	4/20/2021	5/4/2021	
593	540.1	Fred Framer	1	Abstract Bouquet	Work Orders To Do	\$612.47	\$0.00	5/10/2021	5/24/2021	
595	541.1	Betty Bevel	1	Smoky Mountains	Work Orders To Do	\$715.69	\$0.00	5/12/2021	5/26/2021	
596	542.1	Frannie Frame	1	Abstract Bouquet	Work Orders To Do	\$596.86	\$0.00	5/17/2021	5/31/2021	
597	543.1	Frannie Frame	1	Fishing At Sunset	Work Orders To Do	\$398.91	\$0.00	5/17/2021	5/31/2021	
598	544.1	Fanny Frame	1	Flowers	Work Orders To Do	\$367.23	\$0.00	5/26/2021	6/9/2021	
599	545.1	Fred Fillet	1	Bouquet III	Work Orders To Do	\$616.72	\$0.00	6/2/2021	6/16/2021	

Art Copies A "Tag" to identify the customers artwork or components.

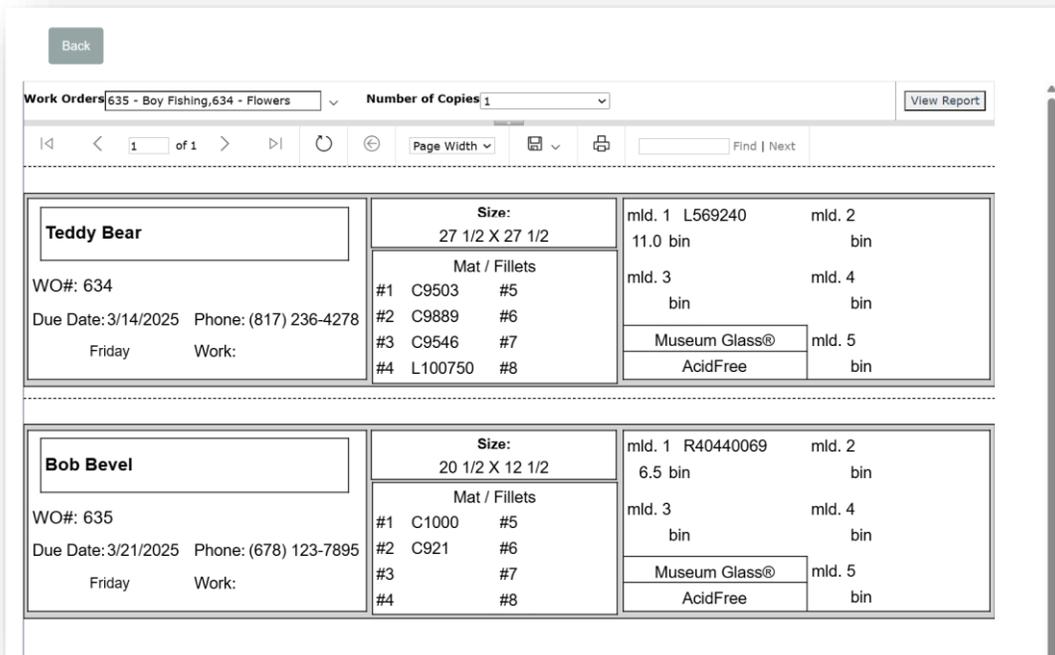
1. Touch/Click the **Workorders** drop down arrow. Touch/Click the **Select All** or **Workorder Numbers** you would like to print an art copy for.

Note: The undelivered workorders for the current year will list.

2. Touch/Click the **Number of Copies** drop down arrow if you would like more than 1 copy. Select number of copies.



3. Touch/Click **View Report**.



Tip: Cut along the dotted line to separate.



Paid In Full Report: Lists all orders that have been paid in full for the date range selected. Report Categories: Final Payment Date, Final Payment Amount, Final Payment Type, Prior Deposit Amount, Invoice #, Revision #, Customer Name, Order Date, Labor \$, Material \$, Subtotal, Tax and Total Amount. Will also total all dollar amounts in each category.

1. Touch/Click the **Report** button. Touch/Click the **Paid in Full** button. Touch/Click **Paid in Full**. The report processes and defaults to the last 7 days.
2. Edit default Dates: Touch/Click **Start/End date calendar icons** to edit date range. Touch/Click **View Report** button to process new date selections.

Start Date 4/1/2016 End Date 4/30/2016 View Report

1 of 1 Find | Next

Paid in Full Report

Run on: 6/22/2016 12:43:47 PM

for 4/1/2016 to 4/30/2016
Training Gallery

Payment Was Applied to These Orders

Final Payment Date	Final Payment	Final Payment Type	Prior Deposits	Invoice #	Revision #	Customer	Order Date	Labor	Material	Subtotal	Tax	Total
4/6/2016 3:54 PM	\$1196.46	Cash	\$0.00	106	2	Fred Framer	1/11/2016	\$278.56	\$839.63	\$1118.19	\$78.27	\$1196.46
4/8/2016 3:47 PM	\$1224.14	Cash	\$0.00	111	1	Fred Fillet	4/8/2016	\$294.03	\$850.03	\$1144.06	\$80.08	\$1224.14
4/11/2016 7:48 PM	\$1440.77	Check	\$0.00	113	1	Fanny Frame	4/11/2016	\$356.95	\$989.56	\$1346.51	\$94.26	\$1440.77
4/16/2016 10:24 AM	\$1022.24	Cash	\$0.00	116	1	Fred Fillet	4/16/2016	\$576.81	\$378.55	\$955.36	\$66.88	\$1022.24
4/16/2016 12:17 PM	\$1492.39	Cash	\$0.00	117	1	Fanny Frame	4/16/2016	\$586.75	\$908.01	\$1394.76	\$97.63	\$1492.39
4/16/2016 3:06 PM	\$744.34	Cash	\$0.00	118	1	Pablo Picasso	4/16/2016	\$14.26	\$681.38	\$695.64	\$48.70	\$744.34
4/27/2016 4:01 PM	\$1003.12	Cash	\$0.00	119	1	Betty Bevel	4/25/2016	\$66.70	\$870.79	\$937.49	\$65.63	\$1003.12
4/30/2016 12:24 PM	\$555.26	Cash	\$0.00	126	1	Fred Fillet	4/30/2016	\$117.30	\$401.64	\$518.94	\$36.32	\$555.26
Prior Revision Adjustments:												
4/27/2016 6:00 PM			-\$1003.12	119	1	Betty Bevel	4/25/2016	-\$66.70	-\$870.79	-\$937.49	-\$65.63	-\$1003.12
TOTALS:			-\$1003.12					\$2224.66	\$4948.80	\$7173.46	\$502.14	\$7675.60

Paid in Full Monthly: Will list the paid in full total \$ per day/date for the month/year selected. Report categories: Date, Labor, Material, Subtotal, Tax and Total.

1. Touch/Click the **Report** button. Touch/Click the **Paid in Full** button. Touch/Click **Paid in Full Monthly**. The report processes and defaults to the current month and year.
2. Edit default Dates: Touch/Click **Month and Year drop down arrows** to edit date range. Touch/Click **View Report** button to process new date selections.

Month April Year 2016 View Report

1 of 1 Find | Next

Orders Paid In Full Report

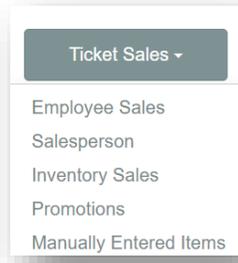
Run on: 6/22/2016 12:58:18 PM

for the Month of April 2016
Training Gallery

Date	Labor	Material	Subtotal	Tax	Total
4/6/2016	\$278.56	\$839.63	\$1118.19	\$78.27	\$1196.46
4/8/2016	\$294.03	\$850.03	\$1144.06	\$80.08	\$1224.14
4/11/2016	\$356.95	\$989.56	\$1346.51	\$94.26	\$1440.77
4/16/2016	\$1177.82	\$1867.94	\$3045.76	\$213.21	\$3258.97
4/27/2016	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4/30/2016	\$117.30	\$401.64	\$518.94	\$36.32	\$555.26
TOTALS:	\$2224.66	\$4948.80	\$7173.46	\$502.14	\$7675.60

Page 1 of 1

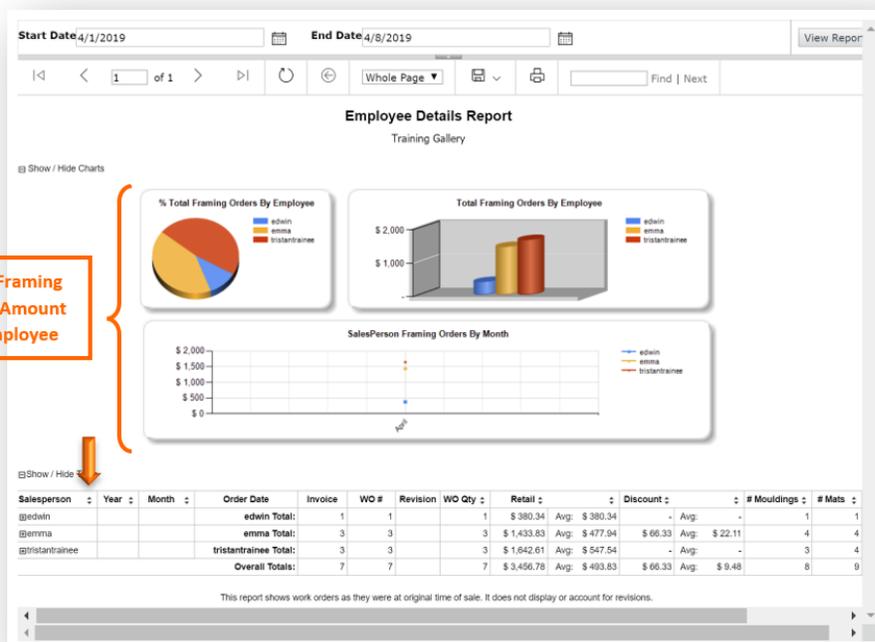
Ticket Sales



Employee Sales Report: Displays charts for % Total Framing Dollar Amount by Employees for the time period selected. (Defaults to the last 7 days.) Lists the following: Salesperson, Year, Month, Order Date, Invoice Total, Workorder Total, Number of Revisions, Workorder Quantity, Total Retail Amount-Average Workorder Amount, Revision #, Discount Amount, Average Discount Amount, Number of Mouldings and Mats sold for selected time period.

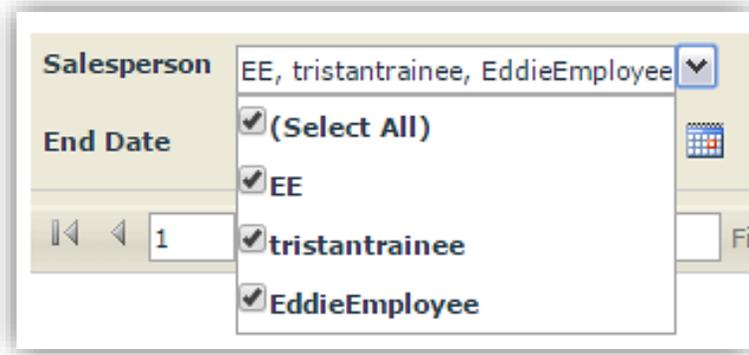
Note: This report shows work orders as they were at the original time of sale. It does not display or account for revisions.

1. Touch/Click the **Reports** button. Touch/Click the **Ticket Sales** button. Touch/Click **Employee Sales**. The report will process and default to the last 7 days.
2. Edit Default Dates: Touch/Click **Start/End date calendar icons** to edit date range. Touch/Click **View Report** button to process new date selections.
3. Sort Chart Categories: The following category headings can be sorted by clicking on the up/down arrow.
 - a. Salesperson: Default names are in alphabetical order. Touch/Click **Arrow** to reverse order.
 - b. Workorder Quantity, Retail Total, Retail Average, Discount Total, Discount Average, Total Mouldings and Total Mats. Touch/Click **Arrow** to sort Low number to High number. Touch/Click **Arrow** again to sort High number to Low number.



Salesperson Report: Lists selected salespeople's productivity statistics with or without invoice detail for the time period selected. The **Without Invoice Detail** report displays: Salesperson Name – Total Sales – New Order Count (Number of Workorders) – Average Order Sales Amount for each salesperson selected. Also includes Store Total Sales Amount – Store New Order Count (Number of Workorders) & Store Average Order Sales Amount. The **With Invoice Detail** additionally includes Invoice # - Customer Name - Order Date – City & Invoice Amount by line item.

1. Touch/Click the **Reports** button. Touch/Click the **Ticket Sales** button. Touch/Click **Employee Sales**. The report will process and default to the last 7 days.
2. Touch/Click **Salesperson Drop Down Arrow**. Touch/Click **Select All** to include all salespeople or **Salesperson's Name(s)**.



3. Touch/Click **Start Date** Field. Touch/Click **Calendar** icon. Touch/Click **Date**.
4. Touch/Click **End Date Calendar** icon. Touch/Click **Date**.
5. Show Invoice Detail: **True is the Default**. Touch/Click **False** if you would like to process the report **Without Invoice Detail**.
6. Touch/Click **View Report** button.

Print

Salesperson: EE, tristantrainee, EddieEmployee Start Date: 11/1/2016 View Report

End Date: 12/1/2016 Show Invoice Detail: True False

1 of 1 Find | Next

Salesperson Productivity Report

Run on

for 11/1/2016 to 12/1/2016
Training Gallery

Salesperson	Invoice #	Customer Name	Order Date	City	Amount
<input checked="" type="checkbox"/> tristantrainee	175	Carol Customer	11/7/2016	Fort Worth	\$629.95
	176	Carol Customer	11/7/2016	Fort Worth	\$26.75
	177	John Doe	11/8/2016	Fort Worth	\$677.91
	178	John Doe	11/8/2016	Fort Worth	\$26.75
	179	John Doe	11/8/2016	Fort Worth	\$24.07
	180	Dick Blick	11/8/2016		\$32.75
	181	Dick Blick 4	11/8/2016		\$32.75
	182	Fred Fillet	11/8/2016	Fort Worth	\$267.49
	183	Matthew Mat	11/8/2016	Atlanta	\$267.50
	184	Bob Bevel	11/8/2016	Holly Springs	\$32.75
	185	Fanny Frame	11/8/2016	Deerfield	\$32.75
	186	Margie Moulding	11/8/2016	Holly Springs	\$267.50
	188	Margie Moulding	11/16/2016	Holly Springs	\$337.05
	189	Test Guy	11/18/2016	Canton	\$1290.41
Total:					\$3946.38
New Order Count:					16
Average Order:					\$246.65
<hr/>					
Store Total:					\$3946.38
New Order Count:					17
Average Order:					\$245.48

Page: 1 Note: This report includes information that is current as of the print time.

Salesperson Productivity Report With Detail

Print

Salesperson: EE, tristantrainee, EddieEmployee Start Date: 11/1/2016 View Report

End Date: 12/1/2016 Show Invoice Detail: True False

1 of 1 Find | Next

Salesperson Productivity Report

Run on: 6/

for 11/1/2016 to 12/1/2016
Training Gallery

Salesperson	Invoice #	Customer Name	Order Date	City	Amount
<input checked="" type="checkbox"/> tristantrainee	Total:				\$3946.38
	New Order Count:				16
	Average Order:				\$246.65
<hr/>					
	Store Total:				\$3946.38
	New Order Count:				17
	Average Order:				\$245.48

Page: 1 Note: This report includes information that is current as of the print time.
The information is subject to change if orders are edited, deleted, or refunded after the time of printing, and for this reason also may not reconcile with other LifeSaver reports.

Salesperson Productivity Report Without Detail

Inventory Sales Report: Sales report on inventory items. Categorizes Inventory Sales by Supplier, Invoice Date, Revised Date, Sold To (Customer Name), Invoice #, Item #, Title, Artist Name, Quantity, Cost (Before Markup), Pending (Price after invoice balance is paid.), Sold Amount & Commission. The report totals the following categories: Cost, Pending, Sold & Commission.

1. Touch/Click the **Reports** button. Touch/Click the **Ticket Sales** button. Touch/Click **Inventory Sales**. The report will process and default to the last 7 days.

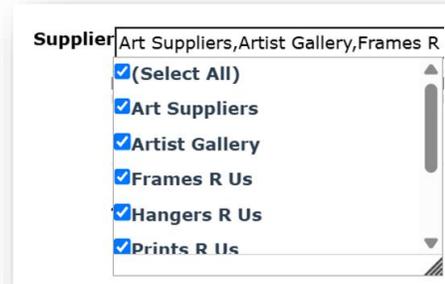
Edit Report Filters

2. Start & End Date Range: Touch/Click **Start & End Date Calendar icons**. Touch/Click desired dates.

3. Touch/Click the **Inventory Type** drop down arrow. Touch/Click **Art, Finished Product, Supply or Select All**.



4. Touch/Click the **Supplier** drop down arrow. Touch/Click the **Supplier(s)** you would like to display in the report or touch/click **Select All**.



5. Touch/Click the **Artist** drop down arrow. Touch/Click the **Artists** you want to display on the report or touch/click **Select All**.



Tip: Click & Drag the Scroll Bar left to right to view report filters.

Start Date
End Date

Inventory Type
Supplier
Artist

6. Touch/Click **View Report** button to process new filters.

Start Date
End Date

Inventory Type
Supplier
Artist

Inventory Sales Report

3/10/2025 through 3/17/2025

Supplier	Invoice Date	Revised	Sold To	Invoice #	Item #	Title	Artist	Qty	Cost	Pending	Sold	Commission	
Artist Gallery	3/13/2025	3/13/2025	Charlie Brown	720	F1234	The Winding Creek	Art Artist	1	\$150.00	\$202.50			
									Subtotal:	\$150.00	\$202.50		
Frames R Us	3/12/2025	3/12/2025	Artie Artist	718	B1234	Aqua Blue Ready Made Frame 8x10		1	\$15.00		\$25.00		
									Subtotal:	\$15.00		\$25.00	
Unknown	3/13/2025	3/13/2025	Teddy Bear	719	A1234	The Italian Villa	Artie Artist	1	\$175.00		\$350.00	\$75.00	
	3/13/2025	3/13/2025	Teddy Bear	719	CB1234	Confetti Bouquet II	Erica Vess	1	\$75.00		\$187.50		
	3/13/2025	3/13/2025	Teddy Bear	719	D1234	Vanilla Scented - Color : Cream - Pillar Size 3x6		1	\$10.00		\$30.00		
	3/14/2025	3/14/2025	Gladys Glazing	721	A1234	The Italian Villa	Artie Artist	1	\$175.00		\$350.00	\$75.00	
	3/14/2025	3/14/2025	Gladys Glazing	721	CB1234	Confetti Bouquet II	Erica Vess	1	\$75.00		\$187.50		
									Subtotal:	\$510.00		\$1105.00	\$150.00
Total									\$675.00	\$202.50	\$1130.00	\$150.00	

Promotions Report: A great tool to track the performance of your store created promotions. The report will group invoices by no promotion and promotion name. Category headings are as follows: Promotion, Customer Name, Order Date, Invoice Number, Revision Number, Workorder Number, City, Zip, Amount and Discount Amount.

1. Touch/Click the **Reports** button. Touch/Click the **Ticket Sales** button. Touch/Click **Promotions**. The report will process and default to the last 7 days.

Edit Date Range

2. Touch/Click **Start & End Date Calendar icons**. Touch/Click desired dates. Touch/Click **View Report** button to process new date range.

Start Date: 4/7/2019 End Date: 4/13/2019 View Report

1 of 1 100% Find | Next

Promotions Report Run on: 4/19/2019 4:26:00 PM

From 4/7/2019 to 4/13/2019

Training Gallery

Promotion	Customer Name	Order Date	Inv #	Rev	WO #	City	Zip Code	Amount	Discount
None	Charlie Brown	4/8/2019	395	1	393	Fort Worth	76179	\$692.08	\$0.00
	Carol Customer	4/8/2019	396	1	394	Fort Worth	76179	\$651.23	\$0.00
	Fanny Frame	4/8/2019	398	1	396	Deerfield	60015	\$511.99	\$0.00
	Gladys and Company - Gladys Glazing	4/8/2019	399	1	397	Holly Springs	30114	\$258.53	\$0.00
	Sam Stretcher	4/8/2019	400	1	398	Canton	30114	\$380.34	\$0.00
SUBTOTAL	None				# of Orders: 5	Avg: \$498.83	Total:	\$2494.17	\$0.00
Summer Sale	John Doe	4/8/2019	397	1	395	Fort Worth	76179	\$596.98	\$66.33
SUBTOTAL	Summer Sale				# of Orders: 1	Avg: \$596.98	Total:	\$596.98	\$66.33
Total for All Promotions:					# of Orders: 6	Avg: \$515.19	Total:	\$3091.15	\$66.33

Manually Entered Items: The report lists all of your manually entered items for the time period select. The report defaults to 7 days. The following report categories atr: Invoice #, Rev #. Order Date, Sku, Description, Quantity, Price and Discount.

1. Select **Start/End Dates** if you do not want to default to the last 7 days.
2. Touch/Click the **View Report** button.

Start Date 3/10/2025 End Date 3/17/2025 View Report

1 of 1 Page Width Find | Next

Manually Entered Item Sales

for 3/10/2025 to 3/17/2025
Training Gallery

Invoice	Rev	Order Date	SKU	Description	Qty	Price Each	Discount Each
722	1	3/17/2025	UPS	Shipping Charge	1	\$25.00	\$0.00

Customer



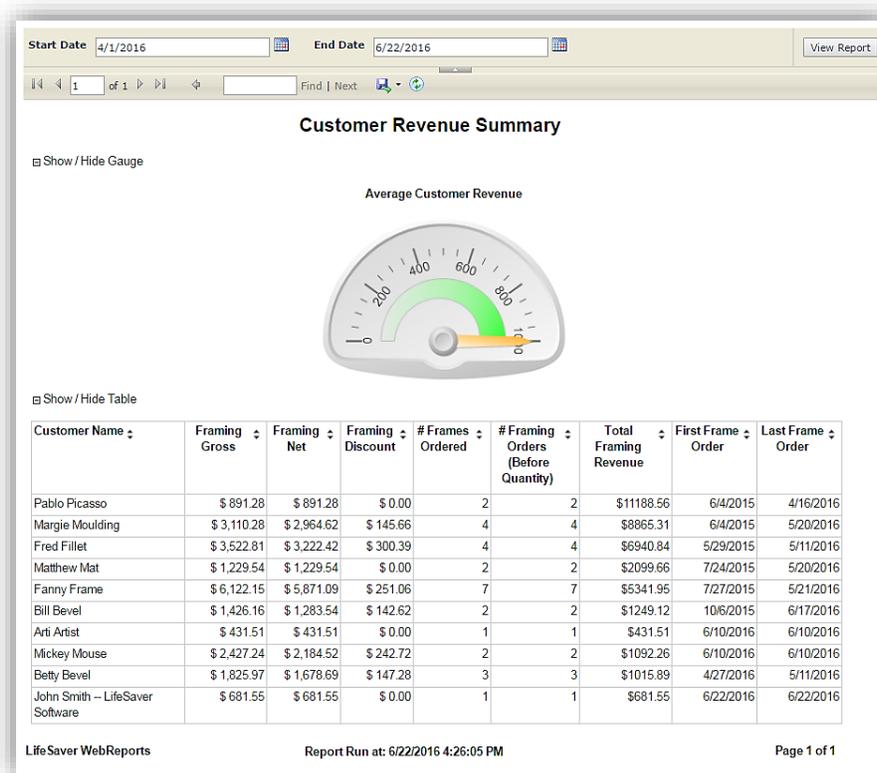
1. Touch/Click the **Reports** button. Touch/Click the **Customer** button. Touch/Click **Customer Report type**. Touch/Click **Customer Revenue** in the list.

Customer Revenue: Displays Average Customer Revenue Gauge and each customer's revenue for the date range selected. Report categories: Customer Name, Framing Gross, Framing Net, Framing Discount, # Frames Ordered, # Framing Orders (Before Quantity), Total Framing Revenue, First Framing Order Date and Last Framing Order Date. The gauge represents your store's average order amount and the numbers on the gauge represent \$ amounts. The below demo example reflects that the store has an average order of over \$1000.00. (Total Framing Revenue divided by Number of Orders)

Note: The report processes and defaults to the last 7 days.

1. Edit Date Range: Touch/Click **Start/End date calendar icons** to edit date range. Touch/Click **View Report** button to process new date selections.

Tip: Touch/Click the Report Headings to **Sort by Ascending/Descending** order.



Customer Export – Constant Contact Export – Mailchimp Contact Export: Displays your store’s customer roster according to the selected report filters. Export the list to be able to use it for emails, mailing labels and newsletters. Report export to file instructions is listed under How to Process/Run Reports – Step 8. The below demo is the Customer Export report.

1. Touch/Click the **Reports** button. Touch/Click the **Customer** button. Touch/Click **Customer Report** type.
2. Touch/Click **Customer Export** in the list.

3. Touch/Click the **Customer Groups Drop Down Arrow**. The default is **Select All**. Touch/Click the filters that you do not want to include in the export.



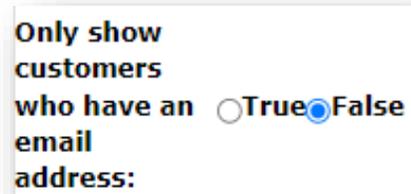
4. Show These Fields. Touch/Click the **Drop-Down Arrow** to open list. Touch/Click/Drag **Slider Bar** to view complete list. Touch/Click the **Fields** you do not want to include in the export.

Note: The Mailchimp and Constant Contact Export does not include this filter. The exports are formatted for Mailchimp and Constant Contact newsletters.

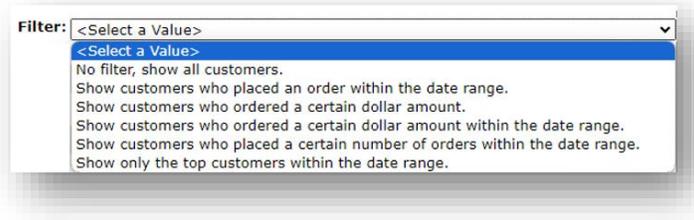


5. Only show customers who have an email address. Select **True or False**.

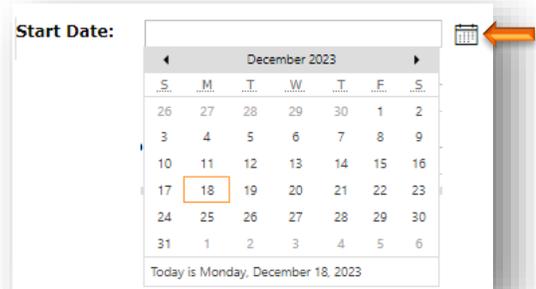
Note: Mailchimp and Constant Contact Exports do not have this filter.



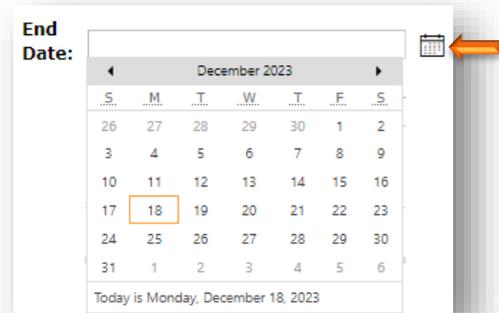
6. Touch/Click the **Filter Drop Down Arrow**.
Select the **Filter** you would like to include in the export.



6. Touch/Click the **Start Date Calendar Icon**.
Touch/Click desired **Date**.



7. Touch/Click the **End Date Calendar Icon**.
Touch/Click desired **Date**.



8. Enter **Amount** with **Dollar Sign \$** in the between fields if you selected a **Certain Dollar Amount Filter**. Enter **Quantity** if you selected a **Certain Number Filter** in the between fields.

Order amount/qty between and

9. **This Many Top Customers** is optional.
Touch/Click into the field and type **Number** of top customers that you would like to view.
Example: 25

This many top customers:

10. Touch/Click **View Report** to process. You can print or export the report.

View Report

Back
View Report

Customer Groups: [None], Artist, Corporate, Interior Dec ▼

Only show customers who have an email address: True False

Start Date: 📅

Order amount/qty between: **and**

This many top customers:

Show these fields: First Name, Last Name, Company, Ad ▼

Filter: Show customers who ordered a certain dollar amount. ▼

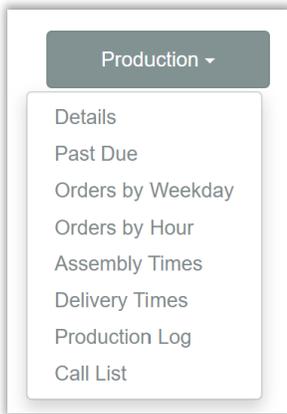
End Date: 📅

Page Width ▼
Find | Next

First Name	Last Name	Company	Address	Address 2	City	State	Zip/Postal Code	Home Phone	Work Phone	Fax Phone	Cell Phone	Fax ID	First Purchase	Last Purchase	Last Purchase Amount	Total Purchase Amount	Email	Group	Do Not Mail	Default Discount	Customer #
Billy	Bond		1234 Street		Fort Worth	TX	76179	(852) 399-2356					4/24/2019	9/19/2021	\$50.00	\$53.11	Billy.Bond@gmail.com				45
Wendy	Coast		2010 Ave B North Hwy		Lawrenceville	GA	30046	(770) 123-4567			(770) 987-6543		5/13/2020	5/13/2020	\$100.00	\$100.00	Wendy.Coast@gmail.com				51
Jay	Customer		1234 Customer Court		Fort Worth	TX	76179	(214) 765-4321					4/15/2018	4/25/2019	\$200.01	\$200.01	Jay.Customer@gmail.com				47
Phuoc	Phuoc		1234 Bond Blvd.		Fort Worth	TX	76179	(817) 933-8899					5/15/2021	5/15/2021	\$300.01	\$300.01	Phuoc.Phuoc@gmail.com				62
Brand	Johnson		892 Robinson Street		Prichard	AL	36066	(440) 934-5534					6/24/2021	6/24/2021	\$50.01	\$50.01	Brand.Johnson@gmail.com				63
Don	Wu		1234 V Grassie Lane		Fort Worth	TX	76179	(440) 623-1823					9/24/2018	9/24/2019	\$101.11	\$101.11	Don.Wu@gmail.com				68
Marko	Wu		1234 V Grassie Lane		Fort Worth	TX	76179	(214) 777-8899					8/25/2018	8/25/2018	\$300.00	\$300.00	Marko.Wu@gmail.com				49
Walter	Wu		1234 Ave 1942					(214) 456-7842					9/15/2019	9/15/2019	\$700.61	\$700.61	Walter.Wu@gmail.com				26
Herman	Wu		1234 Sidney Street		Orlando	FL	32828	(407) 123-4568					6/24/2021	6/24/2021	\$62.06	\$62.06	Herman.Wu@gmail.com				64
Sally	Sally		1234 Customer Circle		Fort Worth	TX	76179	(555) 123-4567					5/18/2021	9/19/2021	\$98.70	\$98.70	Sally.Sally@gmail.com				65

Production (Workshop Management)

The production reports are only effective if you track the workorders progression through the production menu.



1. Touch/Click the **Report** button. Touch/Click **Production**. Touch/Click desired **Production Report Type**.

Production Details: Analysis of your workshop production for the time period entered. The report defaults to the past 30 days.

Note: Touch/Click Start/End date calendar icons to edit date range. Touch/Click View Report button to process new date selections.

Start Date: 12/10/2016 End Date: 1/10/2017 View Report

1 of 1 Find | Next

Production Details

Training Gallery

Store			Days from Order to Assembly	Days from Assembly to Due Date	Quantity	Moulding Count	Glass Type	Mat Count	Fillet Count	
Training Gallery			9.3	(85.7)	3.00	1.00	AR Reflection Free®	1.33	0.00	
	Invoice	Revision	Work Order	Days from Order to Assembly	Days from Assembly to Due Date	Quantity	Moulding Count	Glass Type	Mat Count	Fillet Count
	197	2	235	7	(250)	1	1	Conservation Clear®	2	0
	193	1	229	11	(4)	4	1	AR Reflection Free®	1	0
	195	1	234	10	(3)	4	1	Museum Glass®	1	0

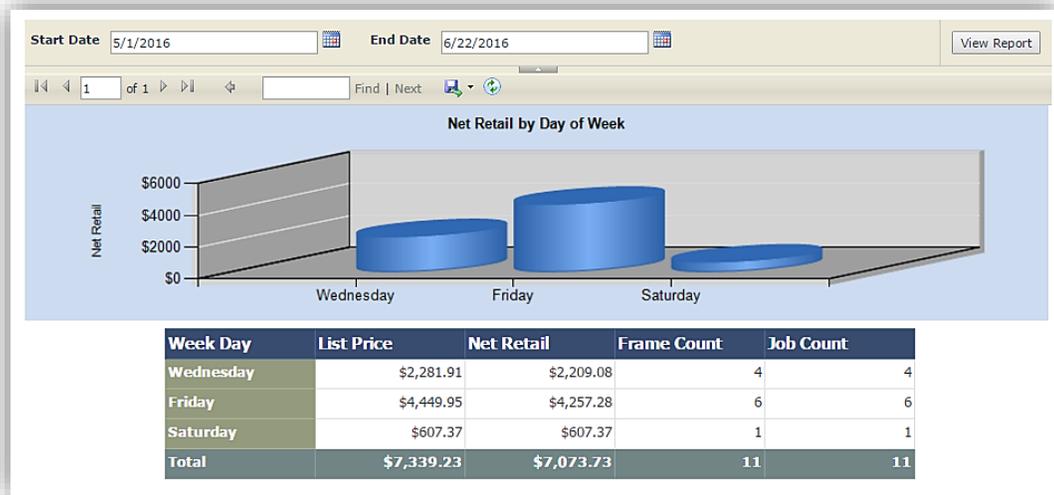
For orders between 12/10/2016 and 1/10/2017 Run at: 1/9/2017 7:33:02 PM

Past Due: Will display all the workorders that are past their due date and have not been updated to Delivered status in the Production menu. Report categories: Invoice #, WO #, # Days Past, Consumer Name, Phone, Email, Retail, Order Date and Due Date.

Status	Invoice #	WO #	# Days Past	Consumer Name	Phone	Email	Retail	Order Date	Due Date
Past-Due	1.3	14	407	Pablo Picasso	817-234-5678		\$0.00	6/4/2015	5/12/2015
	3.1	2	390	Unassigned Unassigned			\$61.94	5/19/2015	5/29/2015
	4.1	3	390	Unassigned Unassigned			\$0.00	5/19/2015	5/29/2015
	5.2	5	390	Pablo Picasso	8172345678		\$237.20	5/20/2015	5/29/2015
	6.1	6	389	Pablo Picasso	8172345678		\$122.06	5/20/2015	5/30/2015
	7.1	7	389	Pablo Picasso	8172345678		\$316.11	5/20/2015	5/30/2015
	10.1	8	390	Fred Fillet	817-789-4568		\$525.05	5/29/2015	5/29/2015
	11.2	10	385	Margie Moulding	678-452-7896	mmoulding@gmail.com	\$320.91	6/4/2015	6/3/2015

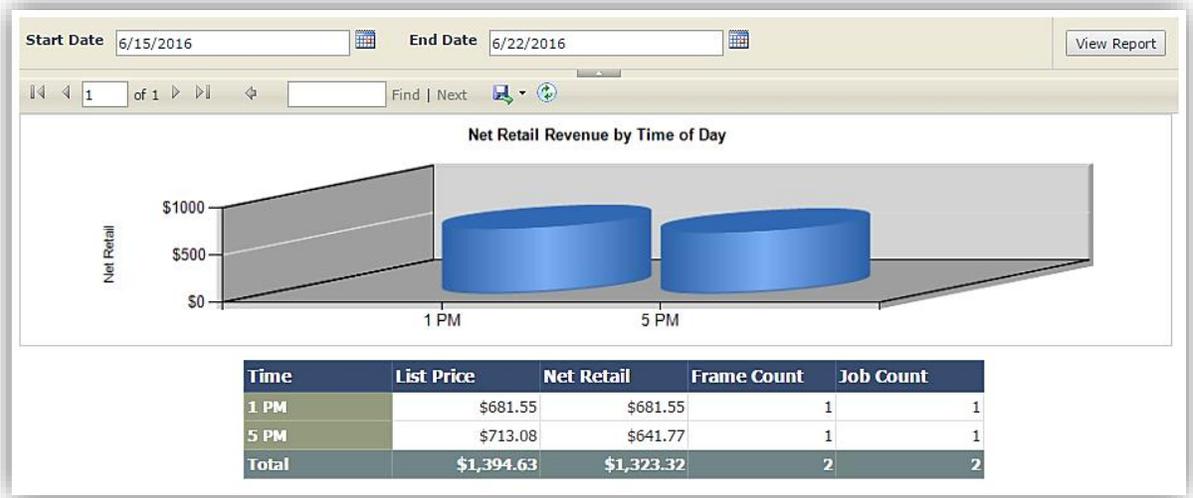
Orders by Weekday: Displays chart and table containing the List Price, Net Retail, Frame Count and Job Count for the weekday for the date range selected.

Note: Date range defaults to the last 7 days. Touch/Click Start/End date calendar icons to edit date range. Touch/Click View Report button to process new date selections.



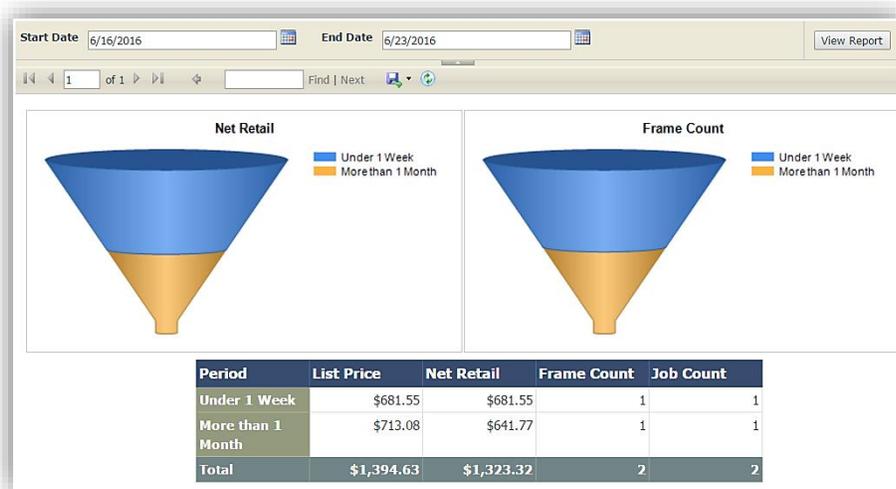
Orders by Hour: Displays chart and table containing the List Price, Net Retail, Frame Count and Job Count for the Time/Hour for the date range selected.

Note: Date range defaults to the last 7 days. Touch/Click Start/End date calendar icons to edit date range. Touch/Click View Report button to process new date selections.



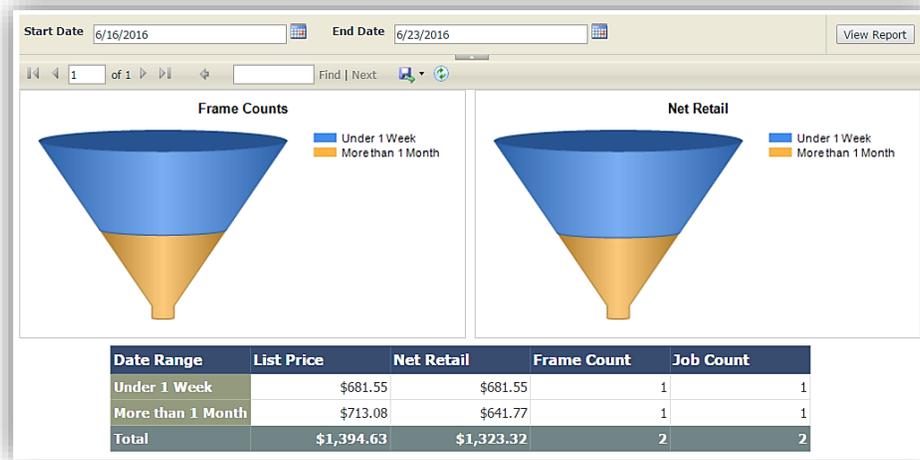
Assembly Times: The average period of time it took to assemble workorders in the date range selected. Displays List Price, Net Retail, Frame Count and Job Count for the orders that were completed Under a Week and the More Than 1 Month.

Note: Date range defaults to the last 7 days. Touch/Click Start/End date calendar icons to edit date range. Touch/Click View Report button to process new date selections.



Delivery Times: The average period of time it took to Deliver workorders in the date range selected. Displays List Price, Net Retail, Frame Count and Job Count for the orders that were delivered Under a Week and the More Than 1 Month.

Note: Date range defaults to the last 7 days. Touch/Click Start/End date calendar icons to edit date range. Touch/Click View Report button to process new date selections.



Production Log: Workshop schedule. Will list the workorders by due date/day. Categorized by Date, Day, Workorder #, Quantity, Customer, Company, Phone, Designer, Location and Description/Title. Status must be moved to Assembled or Delivered status to drop off the Production List.

Filter Options

1. The default filter is **False** which displays all workorders that need to be assembled or are in the process of being assembled.

Filter By Due Date True False

Due Date between 3/24/2019 and 3/30/2019

1 of 1

Workorder Production Log

Training Gallery

Date Due	Day	Inv #	W/O #	Qty	Rush	Customer Name	Company	Phone	Designer	Location	Description
3/21/2019	THU	382	380	1		John Smith	LifeSaver Software	(404) 999-9999	tristantrainee		Cloudy Sky
3/22/2019	FRI	384	382	1		Bill Bevel		(817) 456-7412	tristantrainee		Beach Day
4/2/2019	TUE	386	384	1		Margie Moulding		(678) 452-7896	tristantrainee		Promotion
	TUE	387	385	1		Bob Bevel		(678) 123-7895	tristantrainee		Blue Sailboat
	TUE	388	386	1		Carol Customer		4568899	tristantrainee		Cabin in the Wood
	TUE	389	387	1		Fred Fillet		(817) 789-4568	tristantrainee		Sunny Day
	TUE	390	388	1		Jane Doe		(456) 789-1542	tristantrainee		White House
4/3/2019	WED	391	389	1		Charlie Brown		(817) 255-3112	tristantrainee		Boy fishing

Page: 1

2. The **True** filter will display the workorders whose due dates fall during the date range selected.

To Process:

- a. Touch/Click the **True** circle field.
- b. Touch/Click first **Calendar** icon.Touch/Click **Start Date**.
- c. Touch/Click second **Calendar** icon. Touch/Click **End Date**.
- d. Touch/Click **View Report** to process.

Filter By Due Date True False

Due Date between 3/31/2019 and 4/6/2019

View Report

1 of 1 100% Find | Next

Workorder Production Log

Training Gallery

Date Due	Day	Inv #	W/O #	Qty	Rush	Customer Name	Company	Phone	Designer	Location	Description
4/2/2019	TUE	386	384	1		Margie Moulding		(678) 452-7896	tristantrainee		Promotion
	TUE	387	385	1		Bob Bevel		(678) 123-7895	tristantrainee		Blue Sailboat
	TUE	388	386	1		Carol Customer		4568899	tristantrainee		Cabin in the Wood
	TUE	389	387	1		Fred Fillet		(817) 789-4568	tristantrainee		Sunny Day
	TUE	390	388	1		Jane Doe		(456) 789-1542	tristantrainee		White House
4/3/2019	WED	391	389	1		Charlie Brown		(817) 255-3112	tristantrainee		Boy fishing

Page: 1

Call List: Will display all assembled workorders. Use this list to contact the customer to let them know that their workorder is ready for pick up, then record the “Call Status” in the Production or Order menu. The report can be filtered by the following call statuses: Not Called, Called No Answer, Second Call - No Answer, Third Call - No Answer, Called - Left Message or you can Select All for the list to display all call statuses. The default filter is Not Called status. The list does display Balance Due.

Filter Options

1. The default filter will display all assembled orders that have a **Not Called** status.

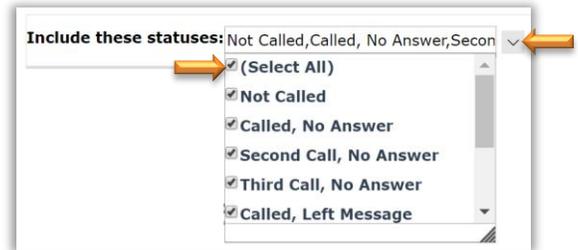
The screenshot shows the 'Call List' report interface. At the top, there is a dropdown menu labeled 'Include these statuses:' with 'Not Called' selected. To the right is a 'View Report' button. Below the menu is a navigation bar with icons for back, forward, refresh, and search, along with a 'Page Width' dropdown and a 'Find | Next' search box. The main content area is titled 'Call List' and 'Printed on January 9, 2020'. It contains a table with the following data:

Name	Company	WO #	Date Complete	Acct Bal	Status	Home Phone	Work Phone	Mobile Phone	Bin
Betty Bevel		392	7/18/2019	\$0.00	Not Called	(404) 785-4512			
Betty Bevel		456	12/12/2019	\$2,153.55	Not Called	(404) 785-4512			
Bob Bevel		459	12/12/2019	\$2,697.69	Not Called	(852) 784-5812			
Charlie Brown		457	12/12/2019	\$702.35	Not Called	(817) 255-3112			
Carol Customer		361	2/18/2019	\$0.00	Not Called	(456) 888-4545			
Carol Customer		394	7/18/2019	\$0.00	Not Called	(456) 888-4545			

Call List - Not Called Filter

2. To select additional, less or all filters.

1. Touch/Click the Include These Statuses **Drop Down Arrow**.
2. Touch/Click desired **Filters**. Demo Example: **Select All**.
3. Touch/Click the **View Report** button to process new filter selection.



The screenshot shows the 'Call List' report interface with the 'Select All' filter selected. The 'Include these statuses:' dropdown menu now displays 'Not Called,Called, No Answer,Secon'. The table below contains the following data:

Name	Company	WO #	Date Complete	Acct Bal	Status	Home Phone	Work Phone	Mobile Phone	Bin
Betty Bevel		392	7/18/2019	\$0.00	Not Called	(404) 785-4512			
Betty Bevel		456	12/12/2019	\$2,153.55	Not Called	(404) 785-4512			
Bob Bevel		459	12/12/2019	\$2,697.69	Not Called	(852) 784-5812			
Charlie Brown		457	12/12/2019	\$702.35	Not Called	(817) 255-3112			
Carol Customer		361	2/18/2019	\$0.00	Not Called	(456) 888-4545			
Carol Customer		394	7/18/2019	\$0.00	Not Called	(456) 888-4545			
Carol Customer		419	7/22/2019	\$0.00	Reached Customer	(456) 888-4545			
Carol Customer		460	12/12/2019	\$0.00	Not Called	(456) 888-4545			
Joe Customer		464	12/12/2019	\$391.25	Called, No Answer	(678) 415-9534			

Call List – Select All Filter

Material Usage

The reports will give you general information on your top selling mats, mouldings and glazing.



1. Touch/Click **Report** button. Touch/Click **Material Usage**. Touch/Click **Material Usage** report type.

Note: The Mat, Moulding and Glazing reports date range defaults to the last 7 days. Touch/Click Start/End date calendar icons to edit date range. Touch/Click View Report button to process new date selections.

1. **Mats:** Will display the below for date range selected.

- a. Top 10 Most Popular Mats By Square Feet – Categories: Mat Name (Item Code), Total Sq. Ft and # of Times Used.
- b. Average Top Mat Reveal Gauge – Numbers on the gauge represent inches.
- c. Top 10 Most Popular Mats By Count – Categories: Mat Name (Item Code), # of Times Used and Total Sq. Ft.
- d. Mats Usage Detail – Lists the Invoice # and Workorder # that the mat was contained in, Layer, Mat Name, Mat Price Before Discount, Mat Price After Discount, Mat Cost, Mat Discount, Sq. Ft Used, UI Used, Mat Description and Average Reveal (Top-Bottom-Left-Right).

Print

Start Date End Date View Report

Mat Usage Report

Show / Hide Summary Info

a → Top 10 Most Popular Mats By Sqft

Mat Name	Total Sqft	# Times Used
A4911	5.3	1
C1032	5.1	1
C1000	5.1	1
C1108	1.6	1

b → Average Top Mat Reveal (in inches)

c → Top 10 Most Popular Mats By Count

Mat Name	# Times Used	Total Sqft
C1032	1	5.1
C1108	1	1.6
A4911	1	5.3
C1000	1	5.1

d → Mats Usage Detail

Invoice	Rev	Work Order	Layer	Mat Name	Mat Price Before Discount	Mat Price After Discount	Mat Cost	Mat Discount	Sqft Used	UI Used	Mat Description	Avg Reveal TBLR	Frame Dimensions
234	1	274	1	C1032	\$ 28.08	\$ 28.08	\$ 6.10	-	5.1	54	Dark Olive	4.00	26 X 28
235	1	275	1	C1108	\$ 35.98	\$ 35.98	\$ 8.78	-	1.6	30	Dark Cream	3.00	14 X 16
237	1	276	1	A4911	\$ 27.91	\$ 27.91	\$ 6.34	-	5.3	55.126	ARTIQUE LOGANBERRY	4.00	26.5626 X 28.5626
238	1	277	1	C1000	\$ 29.01	\$ 29.01	\$ 6.31	-	5.1	54	Pompano Beach White	4.00	26 X 28

LifeSaver WebReports
Report Run at: 6/21/2017 5:30:35 PM
Page 1 of 1

2. **Moulding:** Will display the below for date range selected.

- a. Top 10 Most Popular Mouldings By Length – Categories: Moulding Name (Item Code), Total Feet Needed and # of Times Used.
- b. Average Revenue Per Frame Gauge – Numbers on the gauge represent \$.
- c. Top 10 Most Popular Mouldings By Count – Categories: Moulding Name (Item Code), # of Times Used and Total Feet Needed.
- d. Moulding Usage Detail – Lists the Invoice # and Workorder # that the moulding was contained in, Layer, Moulding Name, Moulding Price Before Discount, Moulding Price After Discount, Moulding Discount, Moulding Cost, Feet Needed, Moulding Description and Outside Frame UI.

Print

Start Date End Date View Report

1 of 1 Find | Next

Moulding Usage Report

Show / Hide Summary Info

a → **Top 10 Most Popular Mouldings By Length**

Moulding	Total Feet Needed	# Times Used
R112087	45.00	4
L866361	13.00	1
L733239	12.00	1
L593931	11.00	1
R260051	9.00	1
L193931	-	1
R4921044	-	2
R55	-	1

b → **Average Revenue Per Frame**



c → **Top 10 Most Popular Mouldings By Count**

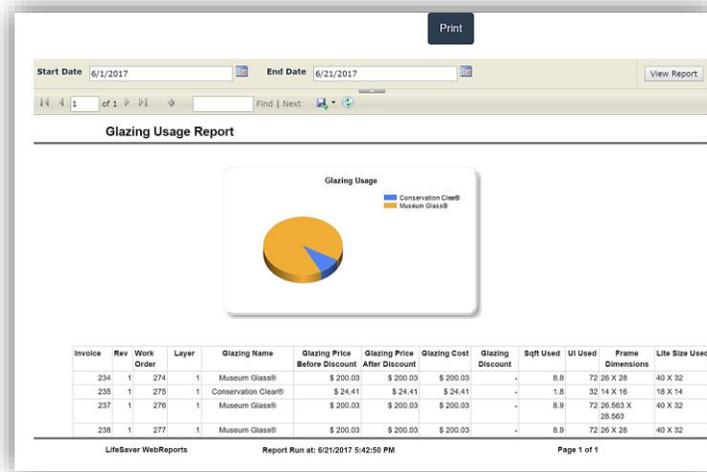
Moulding	# Times Used	Total Feet Needed
R112087	4	45.00
R4921044	2	-
L593931	1	11.00
L193931	1	-
L866361	1	13.00
R260051	1	9.00
L733239	1	12.00
R55	1	-

d →

Invoice	Rev	Work Order	Layer	Moulding Name	Moulding Price Before Discount	Moulding Price After Discount	Moulding Discount	Moulding Cost	Feet Needed	Moulding Desc	Outside Frame UI	Frame Dimensions
76	2	243	1	L593931	\$ 265.72	\$ 265.72	-	\$ 73.81	11.00	W2 PROVIDENCE BLACK 2 3/4"	54.00	25 X 29
76	2	243	2	L193931	\$ 60.09	\$ 60.09	-	\$ 13.98	-	W0 PROVIDENCE BLACK FILLET 1/4	54.00	25 X 29
197	2	235	1	L866361	\$ 437.58	\$ 437.58	-	\$ 145.86	13.00	W2 ANTICA CHESTNUT 3 5/16	63.00	29.5 X 33.5
189	2	237	1	R112087	\$ 299.95	\$ 299.95	-	\$ 88.22	11.00	Versailles 3 Dark Brown Etched Silver	52.00	24 X 28
189	2	238	1	R112087	\$ 299.95	\$ 299.95	-	\$ 88.22	11.00	Versailles 3 Dark Brown Etched Silver	53.00	24.5 X 28.5
200	1	240	1	R112087	\$ 313.59	\$ 235.19	\$ 78.40	\$ 92.23	11.50	Versailles 3 Dark Brown Etched Silver	55.50	28.75 X 26.75
200	1	240	2	R4921044	\$ 62.61	\$ 46.96	\$ 15.65	\$ 14.56	-	Ramino 3/8 Silver Leaf	55.50	28.75 X 26.75
202	1	241	1	R112087	\$ 313.59	\$ 235.19	\$ 78.40	\$ 92.23	11.50	Versailles 3 Dark Brown Etched Silver	56.50	29.25 X 27.25
202	1	241	2	R4921044	\$ 62.61	\$ 46.96	\$ 15.65	\$ 14.56	-	Ramino 3/8 Silver Leaf	56.50	29.25 X 27.25
203	1	242	1	R260051	\$ 290.25	\$ 290.25	-	\$ 96.75	9.00	Cabane 2 1/4 Aged Ivory Bisque	44.00	19.5 X 24.5
204	1	245	1	L733239	\$ 303.14	\$ 303.14	-	\$ 89.16	12.00	W2 ACADEMIE BLK W/GOLD 3	57.25	27.625 X 29.625
204	1	245	3	R55	\$ 65.62	\$ 65.62	-	\$ 15.26	-	La Contessa 5/16 Gold Leaf	57.25	27.625 X 29.625

LifeSaver WebReports
Report Run at: 6/21/2017 5:39:00 PM
Page 1 of 1

3. **Glazing:** Will display glazing type percentage sold chart. The table will list the glazing type sold and break it down into the following categories: # of Frames, # of Jobs, Square Feet Sold and Square Feet Percentage.



1. **Material Report Detail Worksheet:** The report features component highlights to provide an overview of design complexity. It does not include all components, and Workorder totals may vary from the combined total of components shown. Analysis is conducted against all Workorders' most recent revision within the date range, before taxes and after discounts. Workorders are included whether they are paid in full or not. Workorders edited with Price Lock will result in recalculated component prices despite the order total remaining locked. If any Workorders have been edited with Price Lock, the component pricing shown may not reconcile with order totals.

Note: The Workorder Total and Average categories reflect materials and labor only.

Navigation: Report defaults to current month and year. Touch/Click month and year drop down arrow to select a different month/year. Touch/Click View Report button to process new date selections.

Start Date: 2/24/2019 End Date: 3/31/2019 View Report

1 of 1 Find | Next

Material Report Detail Worksheet Run on: 4/8/2019 1:31:13 PM

1234 LifeSaver Lane
Holly Springs, GA 30142
770-123-5678

for 2/24/2019 to 3/31/2019

Framing Components	Total	%	Total LY	% LY
Moulding Total	\$2375.98		\$174.86	
Filets (in frame)	\$0.00	0%	\$174.86	100%
Multiplex	\$59.75	3%	\$0.00	0%
Glass Total	\$1893.88		\$200.03	
Museum Glass®	\$1893.88	100%	\$200.03	100%
Matboard Total	\$449.99		\$29.01	
1 Mat	\$278.60	62%	\$29.01	100%
2 Mats	\$171.39	38%	\$0.00	0%
Borders 3"	\$449.99	100%	\$29.01	100%
Filets (in mat)	\$59.75	13%	\$0.00	0%
Specialty Decorative Cuts	\$36.54	8%	\$0.00	0%
Mounting Total	\$224.27		\$23.22	
AcidFree	\$224.27	100%	\$23.22	100%
Stretching Total	\$0.00		\$0.00	
# Workorders		13		1
Workorder Total	\$5550.56		\$443.86	
Workorder Average	\$426.97		\$443.86	
Moulding Total	\$2375.98		\$174.86	
Moulding Average	\$175.72		\$174.86	
Moulding Average Price Per Foot	\$17.93		\$16.65	

Note: This report features component highlights to provide an overview of design complexity. It does not include all components, and Workorder totals may vary from the combined total of components shown.

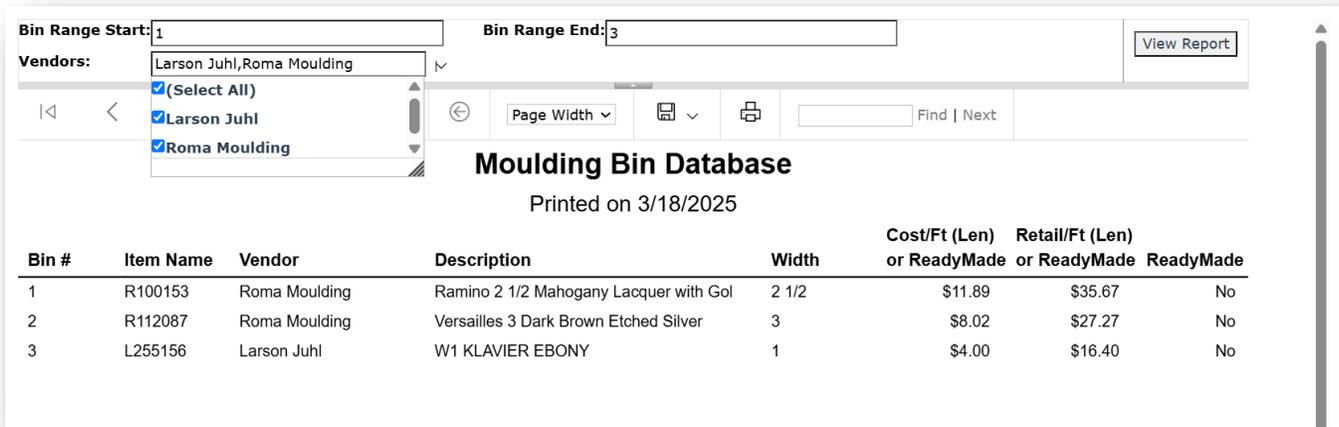
Analysis is conducted against all Workorders' most recent revision within the date range, before taxes and after discounts. Workorders are included whether they are paid in full or not.

Workorders edited with Price Lock will result in recalculated component prices despite the order total remaining locked. If any Workorders have been edited with Price Lock, the component pricing shown may not reconcile with order totals.

Page: 1

Moulding Bin Database: For moulding that has been designated “Store Moulding” you can add a bin location to make it easier to locate. The report defaults to all bins and vendors. To change filters see below instructions,

1. Touch/Click the **Bin Start Range** field. Enter **Bin Number**. Touch/Click **Bin Range End** field. Enter **Bin Number**.
2. Touch/Click the **Vendor** drop down arrow. Touch/Click **Vendor(s) or Select All**.
3. Touch/Click **View Report**.



Bin Range Start: 1 **Bin Range End:** 3

Vendors: Larson Juhl, Roma Moulding

- (Select All)
- Larson Juhl
- Roma Moulding

Page Width Find | Next

Moulding Bin Database

Printed on 3/18/2025

Bin #	Item Name	Vendor	Description	Width	Cost/Ft (Len) or ReadyMade	Retail/Ft (Len) or ReadyMade	ReadyMade
1	R100153	Roma Moulding	Ramino 2 1/2 Mahogany Lacquer with Gol	2 1/2	\$11.89	\$35.67	No
2	R112087	Roma Moulding	Versailles 3 Dark Brown Etched Silver	3	\$8.02	\$27.27	No
3	L255156	Larson Juhl	W1 KLAVIER EBONY	1	\$4.00	\$16.40	No

Invoice

Invoices ▾
Find Invoice

Find Invoice: Pull up invoice to view or re-print.

- Touch/Click **Report** button. Touch/Click Invoices button. Touch/Click **Find** Invoices.
- Type **Invoice #** into the Invoice Id field.
- Touch/Click the **Find** button.
- Invoice will display. Touch/Click to **Print**.
- Touch/Click **Print** on the print preview screen.
- Touch/Click **Home** button to **Exit**.

Invoice Id: **Find**

Print

1 of 1 Find | Next

Invoice #
132
Revision: 1

Training Gallery
1234 LifeSaver Lane
Holly Springs, GA 30142
770-123-5678

John Smith
9999 Green Tree Lane
Holly Springs, TX 30142
js@gmail.com
Home: 770-999-9999
Work: 770-111-1111
Cell: 404-999-9999

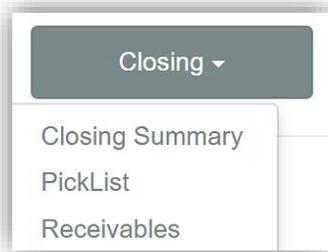
Order Date: 6/22/2016 1:38 PM
Last Revised: 6/22/2016 1:38 PM
Balance Due: \$0.00

Description	Quantity	Price	Discount	Total
Work Order 172: Lamp on Table Due: 6/29/2016	1	\$681.55	\$0.00	\$681.55
			Subtotal	\$681.55
			Tax	\$0.00
			Total	\$681.55

Payments

Date	Type	Method	Amount	
6/22/2016	Payment	Cash	\$681.55	
			Total	\$681.55

Balance Due: \$0.00



1. Touch/Click the **Report** button. Touch/Click the **Closing** button. Touch/Click **Closing Report Type**.

Closing Summary: A daily, monthly, quarterly and yearly financial summary. The report will automatically load the current day's date as the start/end dates, since most stores run the report at the end of each day. New dates can be selected.

Tip: Use the Slider Bar to the right of the report to scroll.

1. First Section: Will list your **Closing Financials and Bank Deposit** Figures.

A screenshot of a web-based report interface. At the top, there are date pickers for 'Start Date' (6/22/2016) and 'End Date' (6/22/2016), and a 'View Report' button. Below the date pickers is a navigation bar with '1 of 1' and 'Find | Next' options. The main content area is titled 'Training Gallery' and contains the following text:

Closing Summary and Bank Deposit figures for Wednesday, June 22, 2016
Gross Dollars Received Month To Date is \$681.55
Total dollars received to date this month last year is \$2,484.55
This year gross dollars Year to Date is \$16,354.58
Last year gross dollars Year to Date is \$3,746.75

Below this text is a table with 6 rows and 2 columns. The first column contains numbered items, and the second column contains dollar amounts. A horizontal line is drawn under the second row's amount.

2. Second Section will list **Financial Groups 1, 2 & 3**: Which is reflective on how your state and business sets up and collects taxes.
- a. **Financial Group 1** (Orders Paid in Full Report): Reflects orders that are paid in full, and it summarizes the Orders Paid in Full Report. If your business pays taxes on orders when they are paid in full you should use this report for reference. (Most Common Method)

Financial Group 1 (Orders Paid In Full Report)		
	Today	MTD
a. Total amount of merchandise only (less tax) is	\$640.11	-\$3,150.93
b. Total amount of labor only (less tax) is	\$41.44	-\$349.17
c. Total amount collected on orders (less tax) is (a + b)	\$681.55	-\$3,500.10
d. Total tax amount collected on jobs is	\$0.00	-\$292.73
e. Subtotal collections and tax brought forward to this report is (c + d)	\$681.55	-\$3,792.83
f. Less prior deposits	\$0.00	-\$4,474.38
g. Plus received on account	\$0.00	\$0.00
h. Total receipts for this report are (e - f + g)	\$681.55	\$681.55
i. Total value of paid in full tax exempt orders for this report is	\$681.55	\$681.55

- b. **Financial Group 2**: Reflects orders that were written during the date range you entered, regardless of payments taken for those orders, it also summarizes the Order Summary Report. If your business pays taxes on the full amount of the order when it is taken, you will use this report for reference.

Financial Group 2 (Order Summary Report)		
	Today	MTD
j. Total value of merchandise only (less tax) is	\$640.11	\$654.64
k. Total value of labor only (less tax) is	\$41.44	\$44.24
l. Total dollar value of orders (less tax) is (j + k)	\$681.55	\$698.88
m. Total tax amount of all orders is	\$0.00	\$1.22
n. Total order value written for this report with tax is (l + m)	\$681.55	\$700.10
o. Total value of tax exempt orders written for this report is	\$681.55	\$681.55

- c. **Financial Group 3:** Reflects payments that were taken for the date range entered, whether it is a deposit, payment or final payment. It summarizes the Payment Summary Report. It indicates that the values are pro-rated. If your business accrues taxes as payments are taken, you will use this report as reference.

Financial Group 3 (Payment Summary Report - Pro-Rated Values)		
	Today	MTD
p. Total value of merchandise only (less tax) is	\$640.11	\$1,230.75
q. Total value of labor only (less tax) is	\$41.44	-\$549.21
r. Total dollar value of payments (less tax) is (p + q)	\$681.55	\$681.54
s. Total tax amount of all payments is	\$0.00	\$0.01
t. Total payments for this report with tax is (r + s)	\$681.55	\$681.55
u. Total value of tax exempt payments written for this report is	\$681.55	\$681.55

3. **Third Section:** Will list the **Sales People Totals** for the date range entered. The totals do not reflect the actual money received. It only reflects the value of orders written.

These sales people wrote orders for this report period:

This number does not reflect the actual money received. It only reflects the value of orders written.

Salesperson	Value of Orders Written	% of Total	# of Orders Written
Eddie Employee	\$681.55	100.00%	1

Note: All MTD and YTD amounts are based on the month and year of the End Date value only.

Pick List: The list will contain the mouldings, mats, mounting materials and glazing needed to complete workorders. Use this list to check your current stock inventory before placing your orders. The picklist is also accessible under the Main Menu button labeled Picklist. It differs somewhat, use the version that works best for you.

1. Touch/Click the **Start of Workorder Range** field. Type the **First Workorder Number** that you want to process on the Picklist. Type **End of Workorder Range**.

Start of Work Order Range: End of Work Order Range:

2. Touch/Click the **Order Status** drop down arrow. Select **Filter**.

Note: The Order Status filters will reflect the order statuses you created in the Production menu.

Order Status:

- (Select All)
- Work Orders To Do
- InProgress
- Frame Cut
- Mat Cut
- Assembled

3. Touch/Click **Report Type** drop down arrow. Touch/Click one of the below report filters:

- a. **By Customer:** List materials by customer name.
- b. **Moulding by Vendor:** List mouldings by vendor name.
- c. **Mat by Vendor:** List mats by vendor name.
- d. **Fabric by Vendor:** List fabric by vendor name.
- e. **All Materials by Vendor:** List all materials by vendor.

Report Type:

- By Customer
- Moulding by Vendor
- Mat by Vendor
- Fabric by Vendor
- All Materials by Vendor

4. Include older orders that were revised. The default is **False**. If you would like to include revised orders touch/click **True**.

Include older orders that were revised: True False

5. Touch/Click the **View Report** button to process. *Demo Example: Filters: Workorders to Do and By Customer.*

Start of Work Order Range:
End of Work Order Range:
Include older orders that were revised: True False
 View Report

Order Status:
Report Type:

⏪ ⏩ of 1 ⏴ ⏵ 🔄 🏠 🖨 🔍 Find | Next

Training Gallery **Pick List by Customer**
 1234 LifeSaver Lane December 1, 2023
 Holly Springs, GA 30142 Orders 613 through 616
 770-123-5678

Customer	W/O	Rev	Revised	Qty	Done	Moulding	Midg Bin Length	Mat/Fabric	Mat Bin Size	Glass	Special	Art	Due	Rush
Moulding, International	613	2	1	No	I2500-85	10.0	C9503 C9889	24 1/2 X 24 1/2	Museum Glass®				10/14/2022	
	614	2	1	No	I2500-85	10.5	C9503 C9889 C9546	25 X 25	Museum Glass®	AcidFree			11/9/2022	
Sales, Sally	615	1	1	No	L569240 L169240	10.5 6.5	C9503 C9889 C9546	25 3/4 X 25 3/4	Museum Glass®	AcidFree			6/2/2023	

Page: 1

Picklist

Receivables: Report will list outstanding balances due for the time range selected. The default is 30 minimum days old through 120 maximum days old. Filter report by All or Selected customers.

1. The default is minimum 90 to maximum 120 day range. To edit touch/click into Minimum or Maximum Days Old fields to **Remove and Type** new **Number of Days**.
2. The default Select Customers filter is Select All. To edit filter. Touch/Click **Select Customers drop down arrow**. Touch/Click the Select All field to de-select All. Touch/Click the Customer Name field
3. Touch/Click **View Report** button to process report.
4. The report will list: Report Process date, Day Range, Totaled Invoice Value and Total Receivables. The Customer's Name and Phone displays and lists the following information per customer: Order Date, Due Date, Invoice #, Revision #, Total Amount, Balance Due Amount and Workorder Description.
5. Touch/Click the **Print** button to print report. The report can also be exported.

Print

Minimum days old: <input style="width: 80%;" type="text" value="30"/>	Maximum days old: <input style="width: 80%;" type="text" value="120"/>	View Report
Select Customers: Bevel, Betty - \$89.51, Bevel, Bill - \$		

1 of 1 Find | Next

Receivables Detail Report

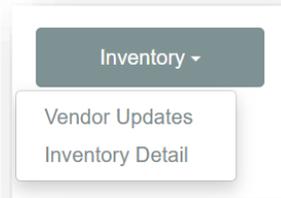
Monday, December 11, 2017

Receivables Between 30 and 120 Days

Total Invoiced Value: \$1,178.70 **Total Receivables: \$768.81**

Order Date	Due Date	Invoice #	Rev	Total	Balance	Description
Bill Bevel (817) 456-7412						
10/14/2017	10/30/2017	263	1	\$318.18	\$318.18	Diploma
				\$318.18	\$318.18	
Betty Bevel (404) 785-4512						
9/26/2017	10/10/2017	258	2	\$379.02	\$89.51	Italian Villa
				\$379.02	\$89.51	
Fred Fillet 817-789-4568						
10/20/2017		272	1	\$240.75	\$120.37	Print
				\$240.75	\$120.37	
Fanny Frame 456-789-1234						
10/19/2017		264	1	\$240.75	\$240.75	Print
				\$240.75	\$240.75	

Inventory Reports



1. Touch/Click **Reports** button on the Main Menu. Touch/Click **Inventory** button drop down arrow. Touch/Click **Vendor Updates**.

Vendor Updates: Lists the new and discontinued moulding, mats and fabric by vendor and date range.

2. Touch/Click **Vendor Updates**. The report will process automatically with updates that took place in the last 30 days and will include all Fabric, Mats and Moulding updates.

Note: The report will only display updates from the vendors you currently have downloaded in your program.

3. The report will display the Component Category, Vendor , Last Update Date, Discontinues/New Item Names, Description and Cost.
4. If the report contains multiple pages, touch/click the **Next Page Arrows** to view. Report can be exported.
5. Touch/Click the **Print** button to print report.
6. Edit Date and Filter.
 - Update Date: Touch/Click **Calendar Icon**. Touch/Click **Day/Date**.
 - Filter by Component(s). Touch/Click **Show Drop Down Arrow**. Touch/Click the **Select All** field to de-select. Touch/Click the **Applicable Component(s)** : Fabric, Mat or Moulding.
7. Touch/Click the **View Report** button to process new date and filter.

The screenshot shows a software interface for 'Vendor Updates'. At the top right is a 'Print' button. Below it is a search bar with 'View Updates Since' set to '11/12/2017' and a 'Show' dropdown menu set to 'Fabric, Mats, Mouldings'. A 'View Report' button is on the right. Below the search bar is a navigation bar with '1 of 1' and 'Find | Next' options. The main title is 'Vendor Updates' with the subtitle 'From 11/12/2017 through 12/12/2017'. Under the heading 'Mouldings', the vendor 'Larson Juhl' is listed with a 'Last Update: 12/11/2017'. A table follows with columns for 'Item Name', 'Description', and 'Cost'. Items are categorized as 'Discontinued' or 'New'.

	Item Name	Description	Cost
Discontinued	L501-505W	W1 EBONIZED WALNUT 5/8	\$4.86
	LN117E861	DAMASCAN STEEL 7/16	\$4.58
	LN58169	SILVER MOSS	\$2.16
	LPC9535	MAG 3/4 X 3 1/2	\$0.65
New	LA597	STRETCHER BAR	\$1.08

Inventory Detail: The report will list your inventory item details which include Art, Finished Product & Supplies dependent on the selected filters.

1. Touch/Click Reports. Touch/Click Inventory Reports. Touch/Click Inventory Detail.
2. The report will process and display the entire inventory by inventory type. It defaults to all in/out of stock inventory items, all vendors and consigned/ unconsigned inventory items.
3. The categories for Art, Finished Product and Supply are: Item Number, Title, Description, Artist, Cost (Without Markup), Retail (With Markup), Quantity, Vendor Name, Bin #. The report Totals each inventory group by total Cost & Total Retail. It also totals all 3 groups together.

Back

In Stock Items Only True False Bins Only True False View Report

Item Type: Art, Finished Product, Supply Consigned Items: Show All

1 of 1 Page Width Find | Next

Inventory Report

Wednesday, March 19, 2025

Art

Item Number	Title	Description	Artist	Cost	Retail	Qty	Vendor Name	Bin #
A1234	The Italian Villa	The Italian Villa - Print - 20x18	Artie Artist	\$175.00	\$350.00	216	Unknown	1
CB1234	Confetti Bouquet II	18x18 Print by Erica June Vess	Erica Vess	\$75.00	\$187.50	62	Unknown	
F1234	The Winding Creek	Print	Art Artist	\$150.00	\$225.00	252	Artist Gallery	F
G1234	Old Aqua Door	Print	Art Artist	\$50.00	\$125.00	24	Prints R Us	
H1234	River in Fall	The Creek 16x20 Art Print	Artie Artist	\$125.00	\$250.00	252	The Art Company	
J1234	Boy with Red Wagon	Photo	Art Guy	\$25.00	\$50.00	23	Smith's Photography	2
				\$113,525.00	\$211,075.00			

Finished Product

Item Number	Title	Description	Artist	Cost	Retail	Qty	Vendor Name	Bin #
B1234	Ready Made Frame 8x10	Aqua Blue Ready Made Frame 8x10		\$15.00	\$25.00	7	Frames R Us	3
D1234	Vanilla Candle	Vanilla Scented - Color : Cream - Pillar Size 3x6		\$10.00	\$30.00	11	Unknown	
k1234	Black Frame 5x7	Black Frame 5x7		\$10.00	\$15.00	15	Unknown	
				\$365.00	\$730.00			

Supply

Item Number	Title	Description	Artist	Cost	Retail	Qty	Vendor Name	Bin #
E1234	Hanger	Color: Silver		\$5.00	\$10.00	47	Hangers R Us	
zzzz	metal sheet	11x14 metal sheet		\$25.00	\$50.00	250	Unknown	
				\$6,485.00	\$12,970.00			

Total Cost of Goods: \$120,375.00 Total Retail Value: \$224,775.00

Page: 1

4. The following filters are available.

- In Stock Items Only: **False** (No) is the default. The false filter **will display** inventory items that have a quantity of zero. Touch/Click **True** (Yes). The filter **will not display** art inventory items with the quantity of zero. (Out of stock.)
- Bins Only: **False** (No) is the default. The false filter will display all inventory items **with or without** a bin assignment. Touch/Click **True** (Yes). The true filter will **only display** art inventory that contains a bin assignment.
- Consigned Items: The default is **Show All**. This filter will display all inventory **With or Without** consignment. Touch/Click the **Drop Down Arrow** to **Select** and filter the report to **Include** Consigned Items Only or to **Exclude** Consigned Items

5. Touch/Click the **View Report** button to process newly selected filters.

Tax Exempt Reports

Tax Exempt ▾

Tax Exempt Orders

Tax Exempt Delivered Orders

Tax Exempt Payments

Tax Exempt Paid In Full

1. Touch/Click **Reports** button on the Main Menu. Touch/Click **Tax Exempt** button drop down arrow.

Tax Exempt Order Summary Report: *The report lists tax exempt invoices/workorders by selected date range. The report contains the following categories: Date, Invoice #, Revision #, Workorder Number, Customer Name, Description, Tax #, Labor Total, Material Total and Order Total.*

2. Touch/Click **Tax Exempt Orders**.
3. The report defaults to the current date. To change date range. Touch/Click **Start Date Calendar**. Touch/Click **Date**. Repeat steps for **End Date**. Touch/Click **View Report** button to process the report.
4. Touch/Click the **Print Icon** to print the report. Touch/Click the **Export Icon** to export the report.

Start Date:	12/1/2020	End Date:	1/7/2021	View Report					
<p>Tax Exempt Order Summary Report Run on: 1/7/2021 2:58:26 PM</p> <p>for 12/1/2020 to 1/7/2021</p> <p>Training Gallery</p>									
Date	Invoice #	Rev	W/O #	Customer	Description	Tax #	Labor	Material	Order Total
12/2/2020	579	1	530	Gladys Glazing	Report	321321	\$39.96	\$563.16	\$603.12
1/7/2021	582	2	533	Joe Customer	Rolling Hills	123456	\$37.74	\$599.20	\$636.94
1/7/2021	584	1	535	Charlie Brown	Abstract Bouquet	654321	\$39.96	\$563.16	\$603.12
1/7/2021	585	1		Carol Customer	The Italian Villa - Print - 20x18	123123	\$0.00	\$350.00	\$350.00
Totals:							\$117.66	\$2075.52	\$2193.18

Tax Exempt Order Summary Report

Tax Exempt Delivered Order Summary Report: The report lists tax exempt invoices/workorders that have been delivered by selected date range. The report contains the following categories: Date, Invoice #, Revision #, Workorder Number, Customer Name, Description, Tax #, Labor Total, Material Total and Order Total.

1. Touch/Click the **Reports** button. Touch/Click **Tax Exempt**. Touch/Click **Tax Exempt Delivered Orders**.
2. The report defaults to the current date. To change date range. Touch/Click **Start Date Calendar**. Touch/Click **Date**. Repeat steps for **End Date**. Touch/Click **View Report** button to process the report.

Date	Invoice #	Rev	W/O #	Customer	Description	Tax #	Labor	Material	Order Total
1/7/2021	579	1	530	Gladys Glazing	Report	321321	\$39.96	\$563.16	\$603.12
1/7/2021	582	2	533	Joe Customer	Rolling Hills	123456	\$37.74	\$599.20	\$636.94
1/7/2021	585	1		Carol Customer	The Italian Villa - Print - 20x18	123123	\$0.00	\$350.00	\$350.00
Totals:							\$77.70	\$1512.36	\$1590.06

Tax Exempt Delivered Order Summary Report

Tax Exempt Payment Summary Report: The report lists tax exempt payments for the date range selected. The report contains the following categories: Date, Invoice #, Revision #, Workorder Number, Customer Name, Description, Tax #, Labor Total, Material Total and Payment Total.

1. Touch/Click the **Reports** button. Touch/Click **Tax Exempt**. Touch/Click **Tax Exempt Payments**.
2. The report defaults to the current date. To change date range. Touch/Click **Start Date Calendar**. Touch/Click **Date**. Repeat steps for **End Date**. Touch/Click **View Report** button to process the report.

Date	Invoice #	Rev	W/O #	Customer	Description	Tax #	Labor	Material	Payment Total
12/2/2020	579	1	530	Gladys and Company - Gladys Glazing	Report	321321	\$39.96	\$563.16	\$603.12
1/7/2021	582	2	533	Joe Customer	Rolling Hills	123456	\$37.74	\$599.20	\$636.94
1/7/2021	584	1	535	Charlie Brown	Abstract Bouquet	654321	\$39.96	\$563.16	\$603.12
1/7/2021	585	1		Carol Customer	The Italian Villa - Print - 20x18	123123	\$0.00	\$350.00	\$350.00
1/7/2021	586	1	536	Jane Doe	Green Mountains	456456	\$14.62	\$209.58	\$224.20
Totals:							\$132.28	\$2285.10	\$2417.38

Tax Exempt Payment Summary Report

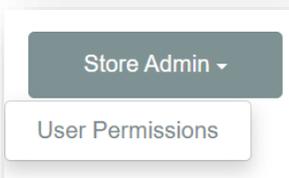
Tax Exempt Paid in Full Report: Will display tax exempt invoices/workorders that are paid in full for the time period entered. Will not display invoices/workorders that do not have a tax exempt number captured in the customer record. The report contains the following categories: Date, Invoice #, Revision #, Workorder #, Customer Name, Description, Tax ID #, Labor, Materials and Order Total.

1. Touch/Click the **Reports** button. Touch/Click **Tax Exempt**. Touch/Click **Tax Exempt Paid In Full**.
2. The report defaults to the current date. To change date range. Touch/Click **Start Date Calendar**. Touch/Click **Date**. Repeat steps for **End Date**. Touch/Click **View Report** button to process the report.

Date	Invoice #	Rev	W/O #	Customer	Description	Tax #	Labor	Material	Order Total
1/7/2021	582	2	533	Joe Customer	Rolling Hills	123456	\$37.74	\$599.20	\$636.94
1/7/2021	584	1	535	Charlie Brown	Abstract Bouquet	654321	\$39.96	\$563.16	\$603.12
Totals:							\$77.70	\$1162.36	\$1240.06

Tax Exempt Paid In Full Summary Report

Store Admin



User Permissions: List the each individual employee user permissions in the shop.

1. Touch/Click **Reports**. Touch/Click Store **Admin**. Touch/Click **User Permissions**.
2. The report defaults to all active employees.

Tip: Touch/Click the User Group drop down arrow to select Managers or Sales. Touch/Click View Report.

3. The report will list the permissions that the employee is approved to use.

User Groups [None], DEFAULT - All Permissions, M Active Users Only True False View Report

1 of 1 Page Width Find | Next

Username	First Name	Last Name	Active	Role Group	Permissions
tiffanytrainee	Tiffany	Trainee	TRUE		Art Condition Create, Edit, View Art Type Create, Deactivate, View Customer Database Create, Deactivate, Edit, View Glazing Configuration Create, Deactivate, Edit, View Mat Configuration Create, Deactivate, Edit, View Moulding Configuration Create, Deactivate, Edit, View Specials Configuration Create, Deactivate, View Vendor Markup Create, Edit, View Store Management Change Store, Fabric, Gift Cards, Inventory Management, Manager Override, Manager Override Reason Codes, Package Price, Print Services, Promotions, Status Admin, Status Types, Store Configuration, Store Reports, Void Invoice Admin Customer Export, Customer Type Admin, Database Maintenance, Store Admin Report Access Assembly Times, Cancelled Orders, Customer Contact Details, Enterprise Reports, Enterprise User Permission, Financial Summary, Past Due And Undelivered Orders, Pricing Profile Deployment, Promotion Summary, Sales By Status Delivery, Sales By Status Production, Ticket Aging, User Permission
tommytrainee	Tommy	Trainee	TRUE		Art Condition Create, Deactivate, Edit, View Art Type Create, Deactivate, Edit, View Customer Database Create, Deactivate, Edit, View Glazing Configuration Create, Deactivate, Edit, View Mat Configuration Create, Deactivate, Edit, View Moulding Configuration Create, Deactivate, Edit, View Specials Configuration Create, Deactivate, View Vendor Markup Create, Deactivate, Edit, View Store Management Status Types, Store Reports Report Access Consolidated PO Details With Costs, Floor Stocking, Floor Stocking Voids, Frame Vue And Glazing Impact, LSSOnline Open Order Full Detail, LSSOnline WIP Report, Purchase Order Details, Specials And Art

Promotions

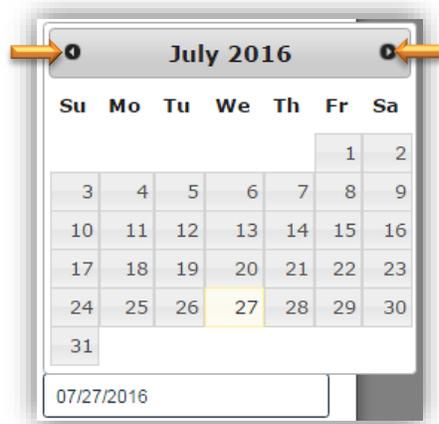
Create, Edit or Deactivate/Activate or Delete a promotional discount for your store.

1. Touch/Click the Promotions button on the Home menu.

Create

1. Touch/Click the **Create New Promotion** button.
2. Complete applicable fields in the Create Promotion window. **Demo Example: 10% Off for New Customers.**
3. Touch/Click **Name** field. Type Promotion Name: **New Customer**
4. Touch/Click the **Active?** Field to **Activate the Discount.**
5. Touch/Click the **Discount 1** field. Type **10**. Touch/Click the **%** field.
6. Touch/Click the **Begin Date** field. Calendar will display. Touch/Click date.

Tip: Touch/Click Back/Forward arrows adjacent to the current month heading to select an alternative month.



Promotion Calendar

7. Touch/Click the **Create** button.

Create Promotion Window

Edit

1. Touch/Click the **Edit** button on the Promotion Line Item that you would like to change.
2. Touch/Click field to **Edit/Add/Delete** data.

Demo Example: Change Discount 1 from 10% to 15%.

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

Edit Promotion Window

Deactivate/Activate

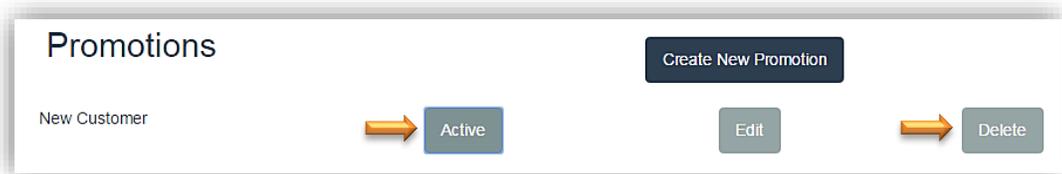
Deactivating a promotion will keep the promotion in the list, so it can be activated again at anytime.

1. Touch/Click the **Activate/Deactivate** button on the promotion line item to toggle back and forth between the two actions.

Delete

Deleting a promotion will completely remove the promotion from the list.

1. Touch/Click the **Delete** button on the promotion line item that you would like to remove.



Deactivate/Activate or Delete Promotion

Manager Override

Create and Delete Manager Override Reason Codes to be applied to the workorder. De-select/Select the Manager Override User Permissions in the Security menu.

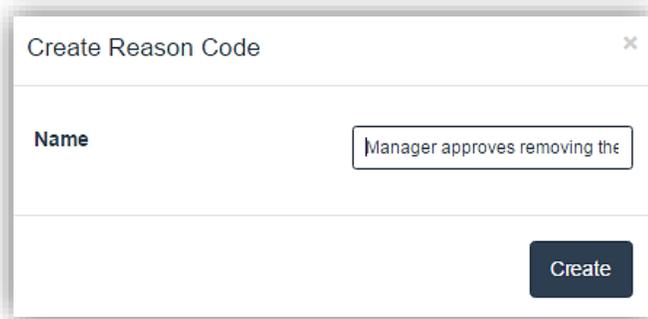
1. Touch/Click the **Manager Override** button on the Home screen.

Create

1. Touch/Click the **Create New Reason Code** button.
2. Type Manager Override Reason into the Create Reason Code field.

Demo Example: Manager approves removing rush fee.

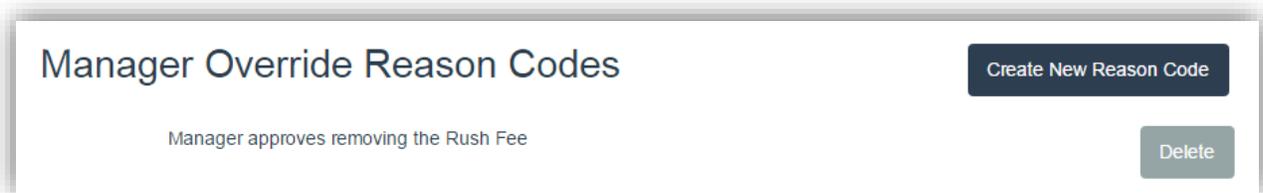
3. Touch/Click **Create** button.



Create Manager Override Reason Code

Delete

1. Touch/Click the Delete button on the Manager Override line item that you would like to remove.



Delete Manager Override Reason Code

De-Select/Select Manager Override User Permissions

For employees that do not have permission to perform Manage Overrides you must de-select each employee's Manager Override Role Assignment in the Security menu.

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

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

2. To de-select/select role assignments Touch/Click the **Roles** button on the employee's line item that you would like to adjust.

3. Touch/Click the **Select field box** to the left of the Manager Override role assignment to **de-select**.

Note: Roles can be edited at any time. To Select option after de-selection, Touch/Click the Select field.

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

5. Touch/Click the **Ok** button to exit and return to the home screen.

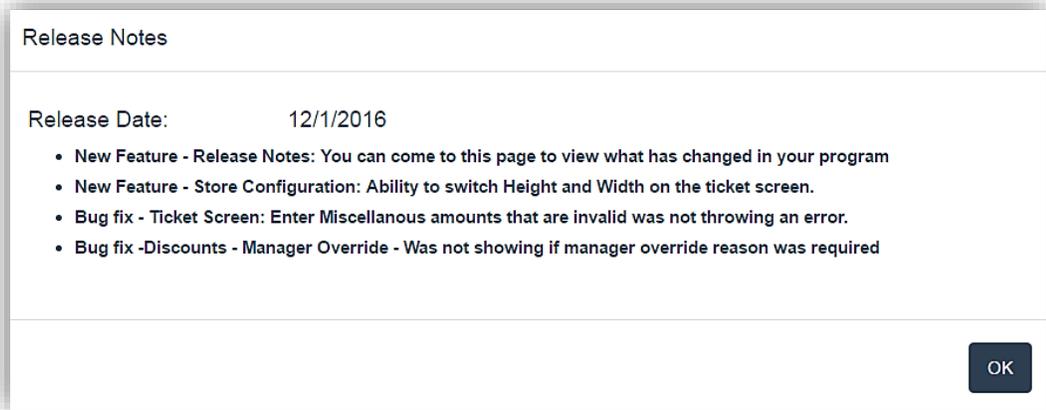


Manager Override Role Assignment Deactivated

Release Notes

Update details that includes New Features and Bug Fixes.

1. Touch/Click the Release Notes menu button on the home screen.



The screenshot shows a dialog box titled "Release Notes". It contains the following text:

Release Date: 12/1/2016

- New Feature - Release Notes: You can come to this page to view what has changed in your program
- New Feature - Store Configuration: Ability to switch Height and Width on the ticket screen.
- Bug fix - Ticket Screen: Enter Miscellaneous amounts that are invalid was not throwing an error.
- Bug fix -Discounts - Manager Override - Was not showing if manager override reason was required

An "OK" button is located in the bottom right corner of the dialog box.

Pick List

The list will contain the mouldings, mats, mounting materials and glazing needed to complete workorders. Use this list to order needed components and to check your current in stock inventory. The picklist is also accessible under the Reports - Closing button. It differs somewhat, use the version that works best for you.

1. Touch/Click the **Picklist** menu button on the main screen.
2. View the picklist by workorder or date range.
 - a. Touch/Click the **Workorder Start** field. Type the **Workorder #** you would like the picklist to begin with. Touch/Click the **Workorder End** field. Type the **Workorder #** you would like the picklist to end with.



The screenshot shows two input fields. The first is labeled "W/O Start" and contains the value "600". The second is labeled "W/O End" and contains the value "603".

- b. Touch/Click **Start Date** field. Select Date. Touch/Click **End Date** field. Select Date.

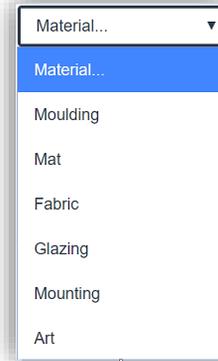


The screenshot shows two input fields. The first is labeled "Start Date" and contains the value "07/20/2022". The second is labeled "End Date" and contains the value "07/27/2022".

Filters/Options

3. Process **All Materials or a Single Component** category for the workorder/date range entered.

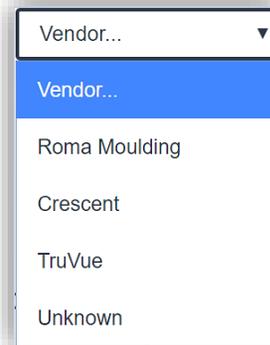
- a. The picklist **Default is to process All Components** needed, so it is not necessary to touch/click the Material drop down arrow.



- b. To process the picklist by a **Singular Component**. Touch/Click the **Material drop down arrow**. Touch/Click one of the following options: **Moulding, Mat, Fabric, Glazing, Mounting or Art**.

4. Process **All Vendors** or a **Single Vendor**.

- a. The picklist **Default is to process All Vendors**, so it is not necessary to touch/click the Vendor drop down arrow.



- b. To process the picklist by a **Singular Vendor**. Touch/Click the **Vendor drop down arrow**. Touch/Click the desired **Vendor Name** in the list. Unknown will list components that are not tied to a vendor.

5. Filter by Type, Material Name, Customer, WO Number, UOM, Dates, Done or Rush. Type **Filter Name** in the field.

Filter

Filter on Type, Material Name, Customer, WO number, UOM, Dates, Done, Rush

6. **Show Ordered?** Touch/Click field to **Select** if you would like the picklist to display components that have already been ordered. The line item will display a check mark in the Showed Ordered? field.

7. **Show Used Stock?** Touch/Click field to **Select** if you would like the picklist to display components that have already been designated to use in store stock. The line item will display a check mark in the Show Used Stock? Field.

The screenshot shows a 'Pick List' interface with the following fields and controls:

- W/O Start: 600
- W/O End: 603
- Start Date: MM/DD/YYYY
- End Date: MM/DD/YYYY
- Material: Material...
- Vendor: Vendor...
- Filter: Filter on Type, Material Name, Customer, WO number, UOM, Dates, Done, Rush
- Show Ordered?:
- Show Used Stock?:

Two orange arrows point upwards to the 'Show Ordered?' and 'Show Used Stock?' checkboxes. Below the screenshot is the text 'Pick List Filters'.

8. Each component line item has the following categories: Component Type, Material (*Item Code*), Vendor Name, Workorder Number, Revision #, Done? (*Will be checked off if the order has been assembled.*), Quantity, UOM, Amount, Unit Cost, Extended Cost, Workorder Due Date.

Note: Unit cost and EXT Cost can be configured not to display on the pick list in the store configure menu

Tip: It may be necessary to touch/click and drag the vertical slider bar to view entire picklist.

9. Touch/Click the **Ordered?** field on the desired line item to designate that the item has been ordered. The component line item will be removed from the list. If you would like to view ordered items touch/click the **Show Ordered?** field. (See step 6)
10. Touch/Click the **Use Store Stock?** field on the desired line item to designate that you will be using in store stock. The component line item will be removed from the list. If you would like to view Use Store Stock items touch/click the **Use Store Stock?** field. (See step 7)
11. Touch/Click **Home to Exit**.

12. Touch/Click the **Print** button to print the list.

Pick List

Type	Material	Vendor	Customer	WO	Rev	Done?	Quantity	UOM	Amount	Unit Cost	Ext cost	Size	Due	Sold	Show Ordered?		Show Used Stock?	
															Rush?	Bin	Ordered?	Use Stock?
Moulding	I2500-85	International Moulding	Moulding, International	606	1		1	Length	10.5	\$5.91	\$62.06	25 3/4 X 25 3/4	10/2/2022	9/19/2022	<input type="checkbox"/>		<input type="checkbox"/>	
Moulding	L169240	Larson Juhl	Moulding, International	606	1		1	Length	6.5	\$3.19	\$20.74	18 X 18	10/2/2022	9/19/2022	<input type="checkbox"/>		<input type="checkbox"/>	
Mat	C9503	Crescent	Moulding, International	606	1		1	Each	1	\$7.05	\$7.05	25 3/4 X 25 3/4	10/2/2022	9/19/2022	<input type="checkbox"/>		<input type="checkbox"/>	
Mat	C9889	Crescent	Moulding, International	606	1		1	Each	1	\$7.05	\$7.05	25 3/4 X 25 3/4	10/2/2022	9/19/2022	<input type="checkbox"/>		<input type="checkbox"/>	
Mat	C9546	Crescent	Moulding, International	606	1		1	Each	1	\$7.05	\$7.05	25 3/4 X 25 3/4	10/2/2022	9/19/2022	<input type="checkbox"/>		<input type="checkbox"/>	
Glazing	Museum Glass®	Unknown	Moulding, International	606	1		1	Each	1	\$200.03	\$200.03	25 3/4 X 25 3/4	10/2/2022	9/19/2022	<input type="checkbox"/>		<input type="checkbox"/>	
Mounting	AcidFree	Unknown	Moulding, International	606	1		1	Each	1	\$22.36	\$22.36	25 3/4 X 25 3/4	10/2/2022	9/19/2022	<input type="checkbox"/>		<input type="checkbox"/>	

Pick List

Computerized Mat Cutter

Valiani

Valiani Studio must be installed on your computer.

1. Touch/Click **Invoice Search** on the main menu.
2. Search for **Invoice/Workorder** by Invoice #, Workorder #, Phone #, Description or Date Range to pull up the Mat Cut Id.
3. Record the **Cut Mat ID Number**. **Demo Example: 970529**

Invoice Search

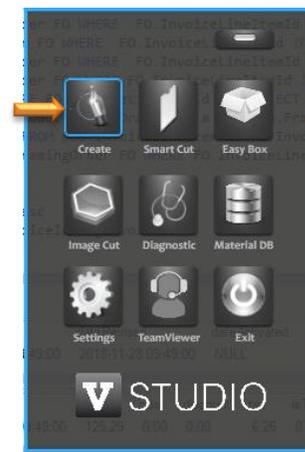
339 Name Phone Description Start Date End Date PO # Search

Inv #	Rev	Customer	Date Created	Balance		Status	Cut Mat ID
339	1	John Customer	12/5/2018	\$0.00	Pay/Refund Edit Print Other	Sunrise - Work Orders To Do	970529

Page: 1

Invoice Search - Cut Mat ID

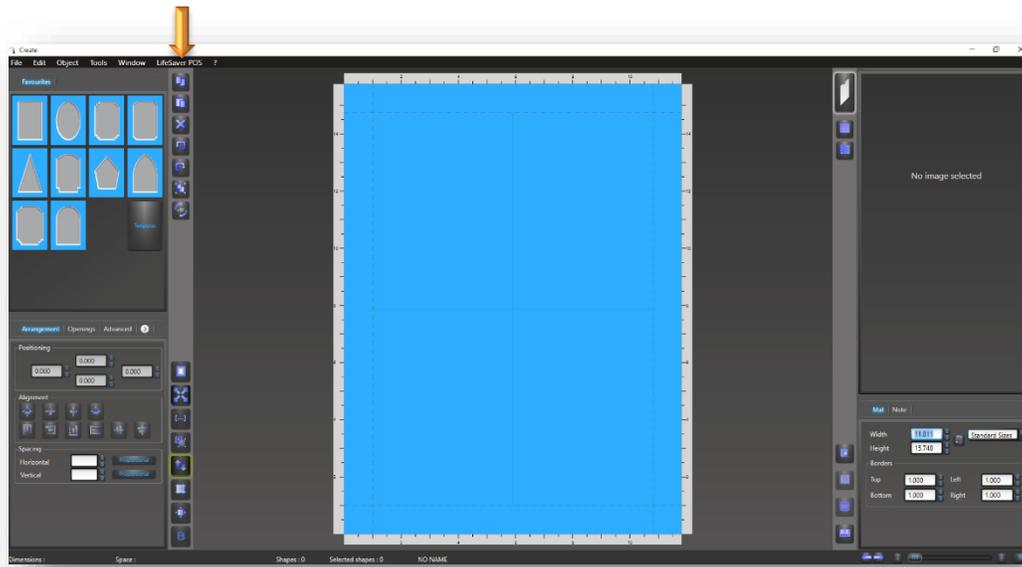
4. Open the **Valiani Studio** program. Click on **Create**.



Valiani Studio Menu

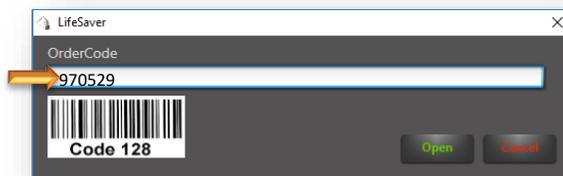
5. Click on **LifeSaver POS** in the menu bar located left top screen.





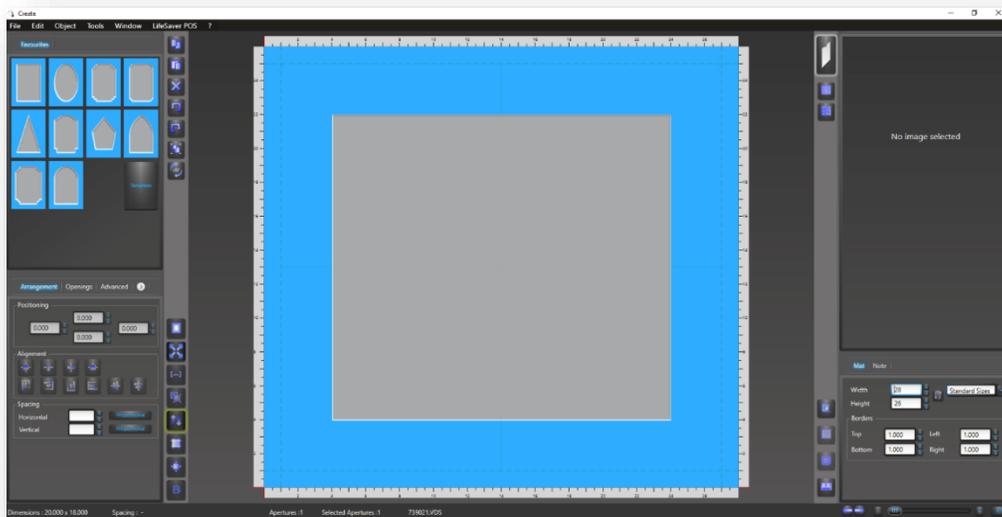
Valiani Studio Create Screen – Lifesaver POS

6. Type **Cut Mat ID Number** into the Order Code field. Click the **Open** button.



LifeSaver - Type Mat Cut ID

7. Mat Cut Image opens in the Create screen. Follow Valiani Studio instructions to proceed.



Valiani Cut Mat Image

Wizard

1. Touch/Click **Invoice Search** on the main menu.
2. Search for **Invoice/Workorder** by Invoice #, Workorder #, Phone #, Workorder Description or Date Range.
3. Touch/Click on the **Other** button on the appropriate line item.
4. Touch/Click the **Wizard File: Work Order: Description/Title** to download Cut Mat file.

Invoice Search

339 Name Phone Description Start Date End Date PO # Search

Inv #	Rev	Customer	Date Created	Balance				Status	Cut Mat ID
339	1	John Customer	12/5/2018	\$0.00	Pay/Refund	Edit	Print	Other	Sunrise - Work Orders To Do

Page: 1

Wizard File: Work Order: Sunrise

5. Double Click/Touch **Cut Mat Download File** located bottom left screen to open the Wizard program.



Invoice Search

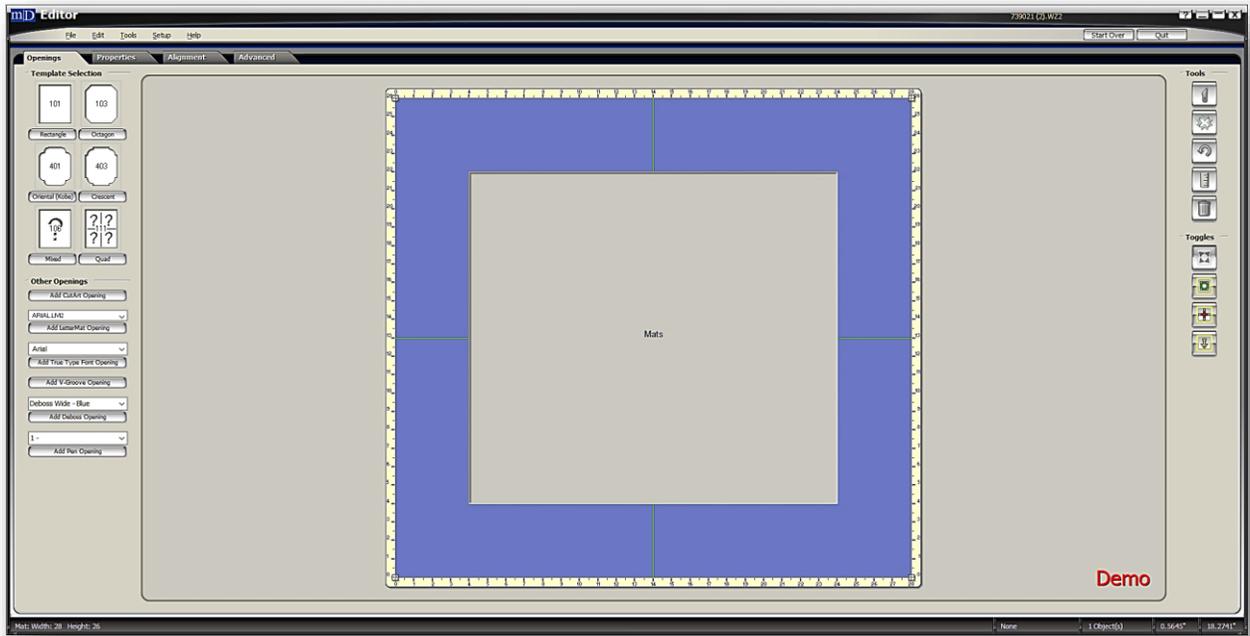
339 Name Phone Description Start Date End Date PO # Search

Inv #	Rev	Customer	Date Created	Balance				Status	Cut Mat ID
339	1	John Customer	12/5/2018	\$0.00	Pay/Refund	Edit	Print	Other	Sunrise - Work Orders To Do

Page: 1

970529 (1).WZ2

6. Follow Wizard CMC instructions to proceed with the mat cutting process.



Order

The Order Menu is a great management tool for your workshop. Create, Manage and Update workorder statuses to track the workorder's progression through the production process. This order screen is similar to the current production screen but is a grid-based layout. It allows you to update the status on workorders, individual components, add notes to the workorder, update customer call status and print the workorder. Some functions are still under construction but will be coming soon.

Note: The Production menu and Order menu will sync status updates.

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

Screen Navigation

- a. The screen will default and display the last 3 weeks invoices/workorders.
- b. Each line item will display the List Icon (Open Workorder Details.), Invoice Number, Workorder Number, Customer Name, Created Date, Due Date, Paid Confirmation (Check Mark Represents Paid.), Current Status, Set Status Option and Download to CMC.
- c. The following functions are available: Search, Status Filter, Vendor Filter (*Coming Soon!*), Start & End Date Range, Reset button, Show Delivered, Create PO (*Coming Soon!*) and Print order list (*Coming Soon!*). The list can also be filtered by Invoice Number, Workorder Number, Customer Name, Created Date, Due Date, Paid Confirmation, or Status.

The screenshot shows the 'Order' screen with a search and filter bar at the top. Below the bar is a table with the following data:

Invoice	W/O	Customer	Created	Due	Paid?	Status	Set Status	CMC
437	417	Charlie Brown	6/27/2019	7/11/2019	✓	InProgress	Set Status	↓
437	418	Charlie Brown	6/27/2019	7/11/2019	✓	Work Orders To Do	Set Status	↓
438	419	Carol Customer	6/27/2019	7/11/2019	✓	Work Orders To Do	Set Status	↓
439	420	Betty Bevel	6/27/2019	7/11/2019	✓	Work Orders To Do	Set Status	↓
440	421	Gladys Glazing	6/27/2019	6/28/2019	✓	Assembled	Set Status	↓
441	422	Wally Wall	7/18/2019	8/1/2019		Work Orders To Do	Set Status	↓

Below the table is a 'Show Delivered' checkbox and 'Page: 1'.

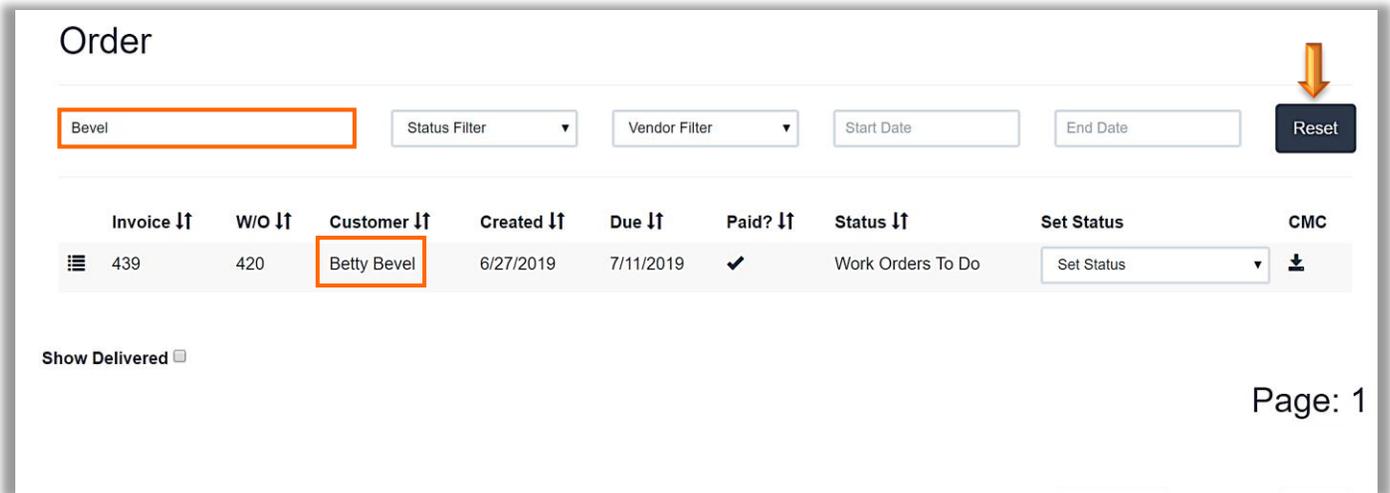
Order Screen

Search

1. Touch/Click the **Order** button on the Main Menu.
2. Type Invoice Number, Workorder Number or Customer's First or Last Name in the **Search** field.

Demo Example: Customer Last Name: Bevel

- The customer Betty Bevel's invoice/workorder line item displays.
- Touch/Click **Reset** button located in upper right screen corner to return to original Order list.



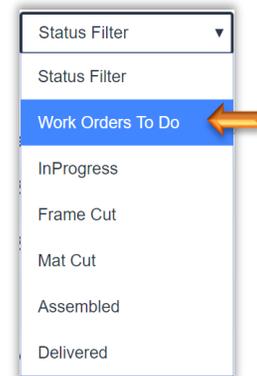
Order Screen - Search

Status Filter

To view all invoices/workorders that fall into one status category.

- Touch/Click the **Order** button on the Main Menu.

- Touch/Click the **Status Filter Drop Down Arrow**.
Touch/Click desired **Status**. **Demo Example:**
Workorders to Do.



- The list will now contain all invoices/workorders that fall into the **Workorders To Do Status**.

4. Touch/Click **Reset** button located in upper right screen corner to return to original Order list.

The screenshot shows the 'Order' screen with a search bar and filters for 'Work Orders To Do', 'Vendor Filter', 'Start Date', and 'End Date'. A 'Reset' button is in the top right. Below is a table of orders:

Invoice ↑↓	W/O ↑↓	Customer ↑↓	Created ↑↓	Due ↑↓	Paid? ↑↓	Status ↑↓	Set Status	CMC
437	418	Charlie Brown	6/27/2019	7/11/2019	✓	Work Orders To Do	Set Status	↓
438	419	Carol Customer	6/27/2019	7/11/2019	✓	Work Orders To Do	Set Status	↓
439	420	Betty Bevel	6/27/2019	7/11/2019	✓	Work Orders To Do	Set Status	↓
441	422	Wally Wall	7/18/2019	8/1/2019		Work Orders To Do	Set Status	↓

At the bottom left, there is a 'Show Delivered' checkbox. At the bottom right, it says 'Page: 1'.

Order Screen - Filter Status

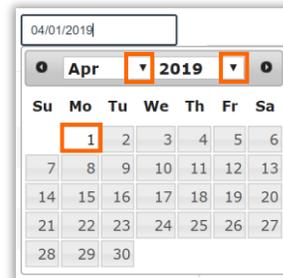
Set Start/End Date Range

View invoices/workorders in a specific date range.

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

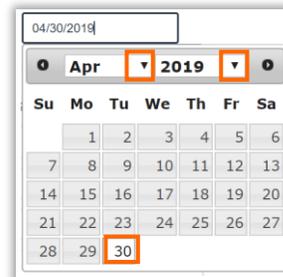
2. Touch/Click the **Start Date Field**. Touch/Click desired **Date**. **Demo Example: 04/01/2019**

Note: Touch/Click Month/Year Arrows to select new Month/Year.



3. Touch/Click the **End Date Field**. Touch/Click desired **Date**. **Demo Example: 04/30/2019**

Note: Touch/Click Month/Year Arrows to select new Month/Year.



4. The Order list will display according to the selected date range.

5. Touch/Click **Reset** button located in upper right screen corner to return to original Order list.

The screenshot shows the 'Order' screen with a search bar, status and vendor filters, and date range filters for 04/01/2019 and 04/30/2019. A 'Reset' button is highlighted with an orange arrow. Below the filters is a table of orders with columns for Invoice, W/O, Customer, Created, Due, Paid?, Status, Set Status, and CMC. The table contains 12 rows of order data. At the bottom, there is a 'Show Delivered' checkbox and a 'Page: 1' indicator with a right arrow.

Invoice ↑↓	W/O ↑↓	Customer ↑↓	Created ↑↓	Due ↑↓	Paid? ↑↓	Status ↑↓	Set Status	CMC
394	392	Betty Bevel	4/3/2019	4/17/2019	✓	Assembled	Assembled	⬇
396	394	Carol Customer	4/8/2019	4/22/2019	✓	Assembled	Assembled	⬇
397	395	John Doe	4/8/2019	4/22/2019	✓	Assembled	Assembled	⬇
398	396	Fanny Frame	4/8/2019	4/22/2019	✓	InProgress	InProgress	⬇
399	397	Gladys Glazing	4/8/2019	4/22/2019	✓	Frame Cut	Frame Cut	⬇
400	398	Sam Stretcher	4/8/2019	4/22/2019	✓	InProgress	InProgress	⬇
402	399	Fred Fillet	4/17/2019	5/1/2019	✓	Assembled	Assembled	⬇
406	401	John Customer	4/26/2019	5/10/2019	✓	Work Orders To Do	Set Status	⬇
407	402	Joe Customer	4/27/2019	5/13/2019		Work Orders To Do	Set Status	⬇
408	403	Joe Customer	4/27/2019	5/13/2019	✓	Work Orders To Do	Set Status	⬇
409	404	Joe Customer	4/27/2019	5/13/2019	✓	Work Orders To Do	Set Status	⬇

Order Screen - Select Date Range

Filter List by Category Heading

1. Touch/Click the **Order** button on the Main Menu.
2. Touch/Click the  icon to the right of the category heading to filter the entire order list by the singular category.
 - a. **Invoice Filter:** Default is ascending numerical order. Touch/ Click filter arrows to list the invoice numbers by descending numerical order.
 - b. **Workorder Filter:** Default is ascending numerical order. Touch/ Click filter arrows to list the workorder numbers by descending numerical order.
 - c. **Customer Filter:** Touch/Click filter arrows to alphabetize the order list by customer name. The first Touch/Click will list the customer names in reverse alphabetical order. The second touch/click will list the customer names in alphabetical order.
 - d. **Created Date Filter:** Touch/Click filter arrows to list the created dates from newest date to oldest date.
 - e. **Due Date Filter:** Touch/Click the filter arrows to list the due dates from newest date to oldest date.
 - f. **Paid Filter:** The check mark icon represents the invoice has been paid. If there is no check mark icon there is a balance due on the invoice. Touch/Click the paid filter arrows to group the paid and unpaid invoices together in the order list.
 - g. **Status Filter:** Touch/Click the filter arrows to group the statuses together in the order list. The first touch/click will list the statuses in reverse alphabetical order. The second touch/click will list the statuses in alphabetical order.

Order

Search Status Filter Vendor Filter 06/20/2019 07/19/2019

Invoice ↑↓	W/O ↑↓	Customer ↑↓	Created ↑↓	Due ↑↓	Paid? ↑↓	Status ↑↓	Set Status	CMC
440	421	Gladys Glazing	6/27/2019	6/28/2019	✓	Assembled	Set Status <input type="button" value="v"/>	<input type="button" value="⬇"/>
437	417	Charlie Brown	6/27/2019	7/11/2019	✓	InProgress	Set Status <input type="button" value="v"/>	<input type="button" value="⬇"/>
437	418	Charlie Brown	6/27/2019	7/11/2019	✓	Work Orders To Do	Set Status <input type="button" value="v"/>	<input type="button" value="⬇"/>
438	419	Carol Customer	6/27/2019	7/11/2019	✓	Work Orders To Do	Set Status <input type="button" value="v"/>	<input type="button" value="⬇"/>
439	420	Betty Bevel	6/27/2019	7/11/2019	✓	Work Orders To Do	Set Status <input type="button" value="v"/>	<input type="button" value="⬇"/>
441	422	Wally Wall	7/18/2019	8/1/2019	✓	Work Orders To Do	Set Status <input type="button" value="v"/>	<input type="button" value="⬇"/>

Show Delivered

Page: 1

Order List - Filtered by Status

Show Delivered

1. Touch/Click the **Order** button on the Main Menu.
2. The order list does not display workorders that have been delivered. To view delivered workorders in the current list. Touch/Click the **Show Delivered Field** located bottom left screen to select. Touch/Click again to De-Select.

Order

Search Status Filter Vendor Filter 06/22/2019 07/22/2019

Invoice ↑↓	W/O ↑↓	Customer ↑↓	Created ↑↓	Due ↑↓	Paid? ↑↓	Status ↑↓	Set Status	CMC
441	B1234	Wally Wall	7/18/2019		✓	Delivered	Delivered <input type="button" value="v"/>	
437	417	Charlie Brown	6/27/2019	7/11/2019	✓	Delivered	Delivered <input type="button" value="v"/>	<input type="button" value="⬇"/>
437	418	Charlie Brown	6/27/2019	7/11/2019	✓	Delivered	Delivered <input type="button" value="v"/>	<input type="button" value="⬇"/>
438	419	Carol Customer	6/27/2019	7/11/2019	✓	Assembled	Set Status <input type="button" value="v"/>	<input type="button" value="⬇"/>
439	420	Betty Bevel	6/27/2019	7/11/2019	✓	Work Orders To Do	Set Status <input type="button" value="v"/>	<input type="button" value="⬇"/>
440	421	Gladys Glazing	6/27/2019	6/28/2019	✓	Assembled	Set Status <input type="button" value="v"/>	<input type="button" value="⬇"/>
441	422	Wally Wall	7/18/2019	8/1/2019	✓	Delivered	Delivered <input type="button" value="v"/>	<input type="button" value="⬇"/>

Show Delivered

Page: 1

Order – Showed Delivered

Set/Update Production Status

Update the workorder's production status.

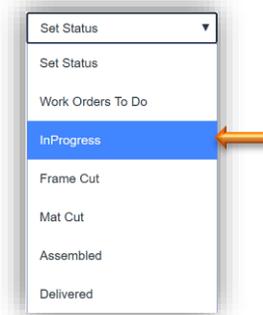
Note: Create and manage production statuses in the New Production Menu.

1. Touch/Click the **Order** button on the Main Menu.
2. Locate invoice/workorder line item that you would like to update production status.

Demo Example: Invoice 441 – Workorder #422 – Update from “Workorders To Do” to “In Progress” Status.



3. Touch/Click the **Set Status** drop down arrow.
Touch/Click **In Progress**.



4. The production status is now **In Progress**.

Note: To update status on individual workorder components, please see the following section.

A screenshot of the 'Order' screen. At the top, there is a search bar and several filter buttons: 'Status Filter', 'Vendor Filter', and two date pickers set to '06/20/2019' and '07/19/2019', along with a 'Reset' button. Below this is a table with the following columns: Invoice #, W/O #, Customer, Created, Due, Paid?, Status, Set Status, and CMC. The table contains several rows of workorder data. The row for Invoice 441, W/O 422, and Customer Wally Wall is highlighted with an orange border. In this row, the 'Status' column shows 'InProgress' and the 'Set Status' dropdown menu is open, with an orange arrow pointing to the 'InProgress' option.

Invoice #	W/O #	Customer	Created	Due	Paid?	Status	Set Status	CMC
437	417	Charlie Brown	6/27/2019	7/11/2019	✓	InProgress	Set Status	↓
437	418	Charlie Brown	6/27/2019	7/11/2019	✓	Work Orders To Do	Set Status	↓
438	419	Carol Customer	6/27/2019	7/11/2019	✓	Work Orders To Do	Set Status	↓
439	420	Betty Bevel	6/27/2019	7/11/2019	✓	Work Orders To Do	Set Status	↓
440	421	Gladys Glazing	6/27/2019	6/28/2019	✓	Assembled	Set Status	↓
441	422	Wally Wall	7/18/2019	8/1/2019	✓	InProgress	Set Status	↓

At the bottom left of the screen, there is a 'Show Delivered' checkbox. At the bottom right, it says 'Page: 1'.

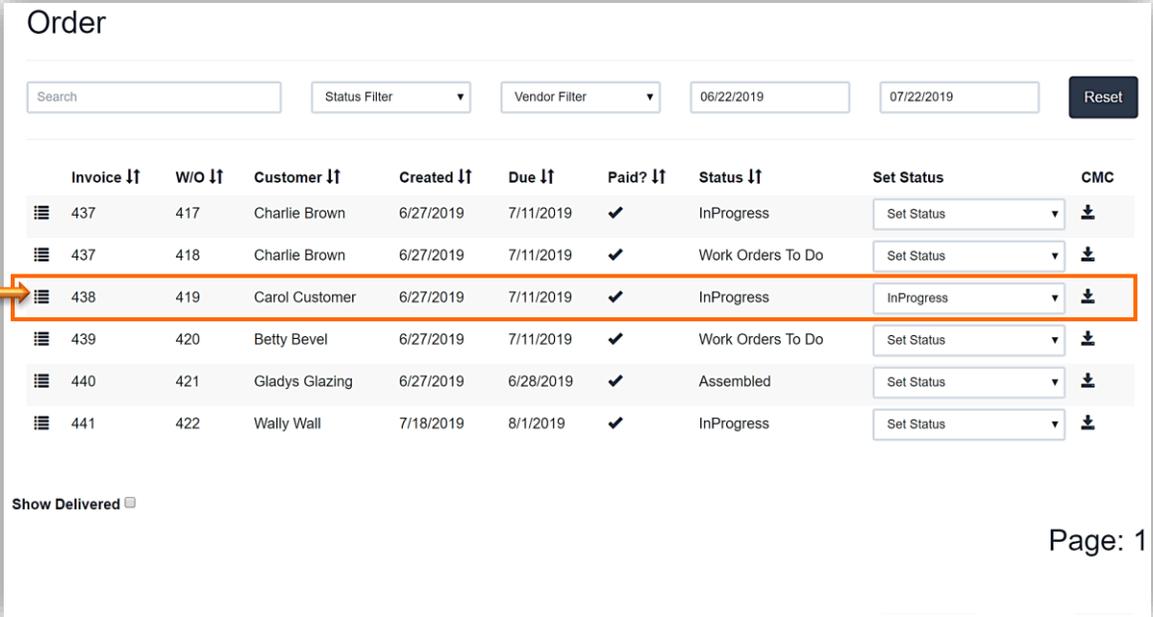
Order Screen – Update Status

Workorder Details

The following options are available in the workorder details window: Update Production Component and Call Status, Add Workorder Notes and Bin Number, Print Workorder, View Component and Workorder Status History.

Update Component Status: A great tool for a workshop that works in “production mode”.

1. Touch/Click the **Order** button on the Main Menu.
2. Touch/Click the List Icon  on the invoice/workorder line item to open the details. **Demo Example: Inv: 438 – W/O #419**



Order

Search Status Filter Vendor Filter 06/22/2019 07/22/2019

	Invoice ↑↓	W/O ↑↓	Customer ↑↓	Created ↑↓	Due ↑↓	Paid? ↑↓	Status ↑↓	Set Status	CMC
	437	417	Charlie Brown	6/27/2019	7/11/2019	✓	InProgress	Set Status <input type="text"/>	
	437	418	Charlie Brown	6/27/2019	7/11/2019	✓	Work Orders To Do	Set Status <input type="text"/>	
	438	419	Carol Customer	6/27/2019	7/11/2019	✓	InProgress	InProgress <input type="text"/>	
	439	420	Betty Bevel	6/27/2019	7/11/2019	✓	Work Orders To Do	Set Status <input type="text"/>	
	440	421	Gladys Glazing	6/27/2019	6/28/2019	✓	Assembled	Set Status <input type="text"/>	
	441	422	Wally Wall	7/18/2019	8/1/2019	✓	InProgress	Set Status <input type="text"/>	

Show Delivered

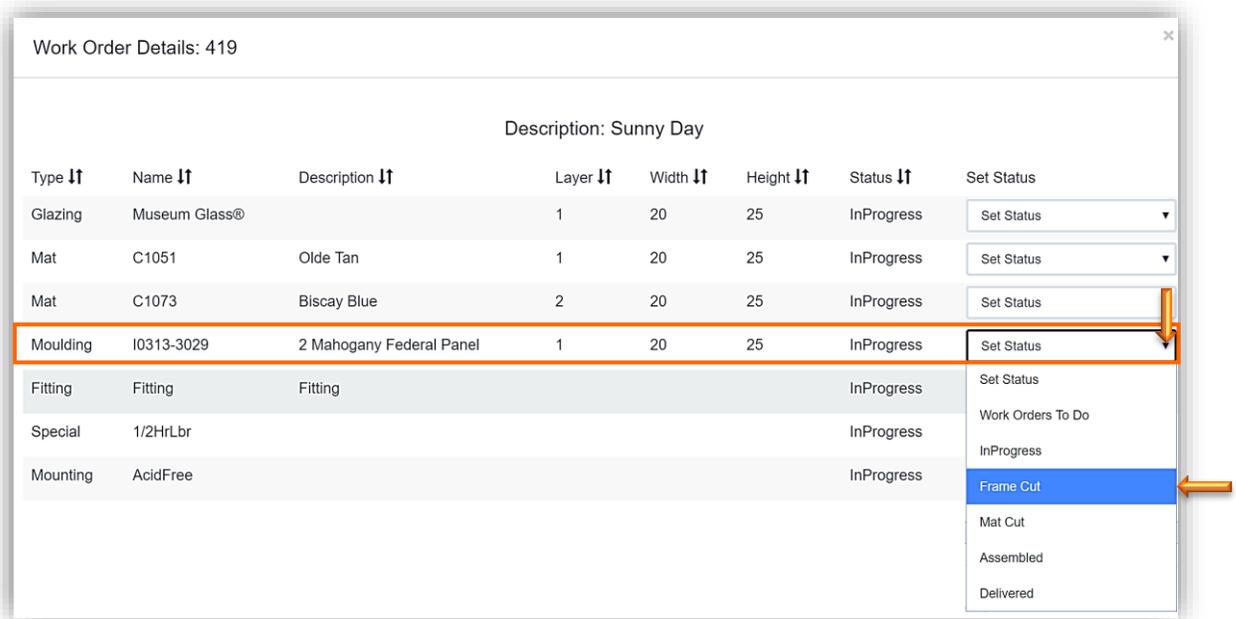
Page: 1

Open Workorder Details

3. Update Component Status is located in the top third of the workorder details window. The section will contain Workorder Description, Component Type, Name, Description, Layer, Width, Height and Status. At this time, the category filter function is not available.

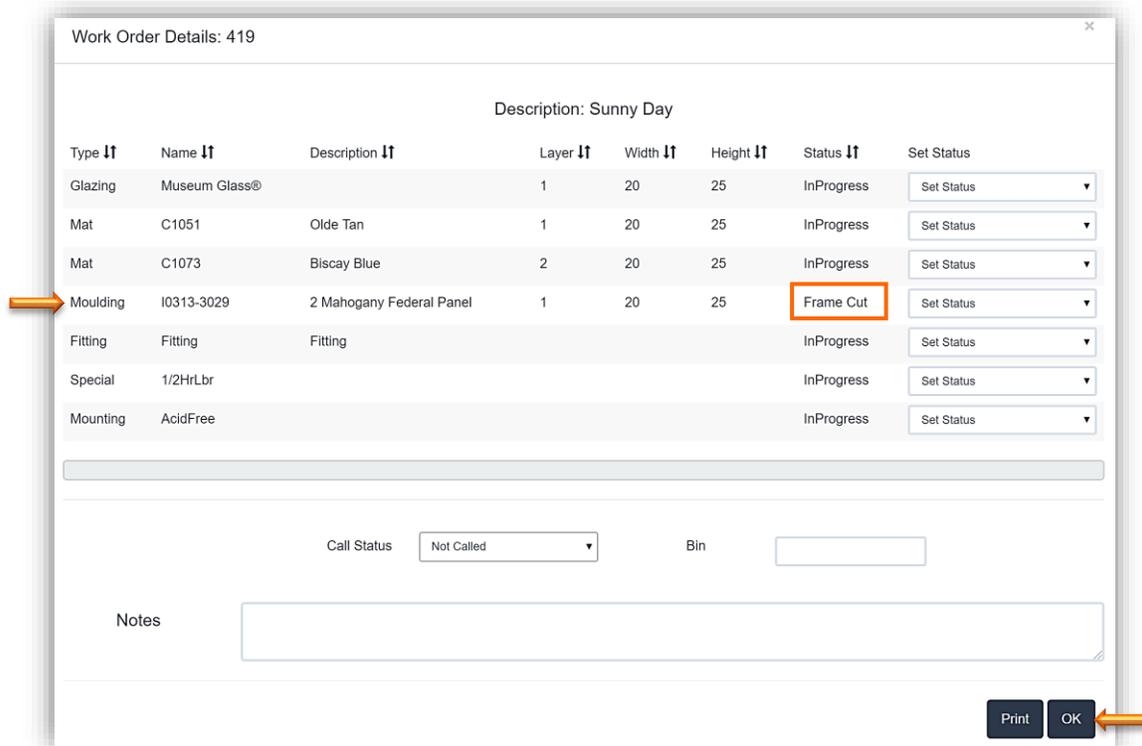
Demo Example: Update the moulding production status to **Frame Cut** on invoice 438 – Workorder 419 to indicate the moulding has been cut.

4. Touch/Click the **Set Status Drop Down Arrow** on the desired line item. Touch/Click **Production Status Type**.
Demo Example: Frame Cut



Order - Workorder Details – Set Component Status

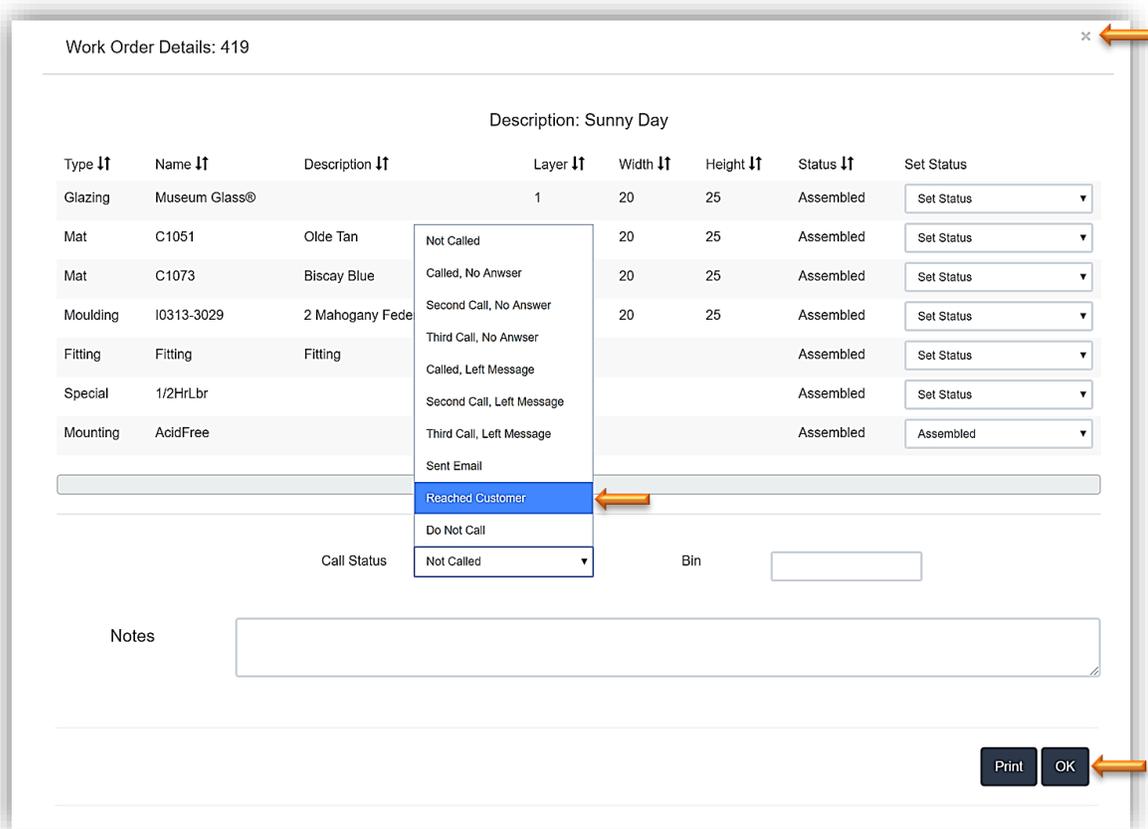
5. Touch/Click the **OK** button to return to the Order Screen.



Order – Set Status to Frame Cut - Close Workorder Detail Window

Update Call Status: Document if the customer has been contacted that their workorder(s) are ready for pickup.

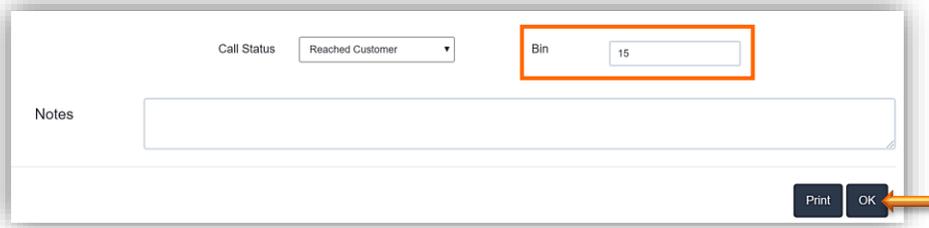
1. Touch/Click the **Order** button on the Main Menu.
2. Touch/Click the List Icon  on the invoice/workorder line item to open the details. **Demo Example:** Inv: 438 – W/O #419
3. Touch/Click the **Call Status** drop down arrow. Touch/Click Status Type. **Demo Example:** Reached Customer.
4. Touch/Click the **OK** button to return to the Order Screen.



Order – Workorder Details – Update Call Status

Add Bin Number

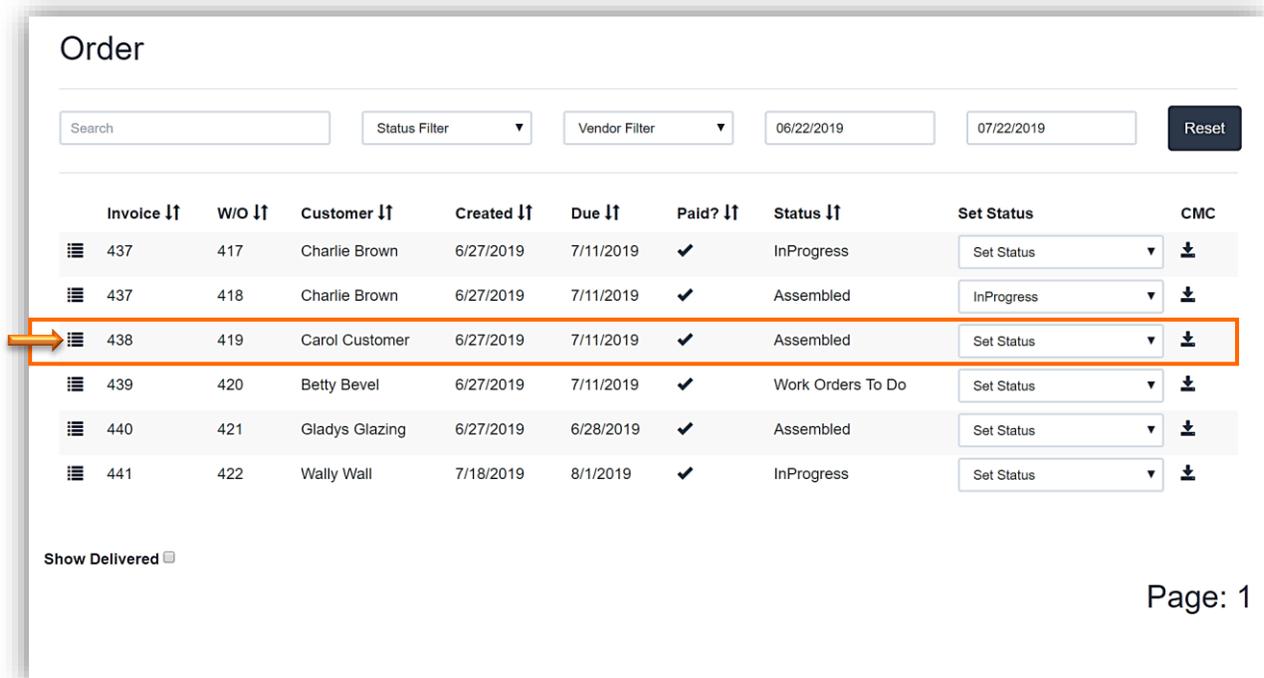
1. Touch/Click the **Order** button on the Main Menu.
2. Touch/Click the List Icon  on the invoice/workorder line item to open the details. **Demo Example: Inv: 438 – W/O #419.**
3. Touch/Click the **Bin Field** located mid window to the right of the Call Status. Type **Bin Number**.
Demo Example: 15.
4. Touch/Click **OK** button to return to the Order screen.



Order - Select - Workorder Details – Add Bin Number

Add Workorder Notes

1. Touch/Click the **Order** button on the Main Menu.
2. Touch/Click the List Icon  on the invoice/workorder line item to open the workorder details. **Demo Example: Inv: 438 – W/O #419.**



Invoice ↑↓	W/O ↑↓	Customer ↑↓	Created ↑↓	Due ↑↓	Paid? ↑↓	Status ↑↓	Set Status	CMC
 437	417	Charlie Brown	6/27/2019	7/11/2019	✓	InProgress	Set Status ▼	
 437	418	Charlie Brown	6/27/2019	7/11/2019	✓	Assembled	InProgress ▼	
 438	419	Carol Customer	6/27/2019	7/11/2019	✓	Assembled	Set Status ▼	
 439	420	Betty Bevel	6/27/2019	7/11/2019	✓	Work Orders To Do	Set Status ▼	
 440	421	Gladys Glazing	6/27/2019	6/28/2019	✓	Assembled	Set Status ▼	
 441	422	Wally Wall	7/18/2019	8/1/2019	✓	InProgress	Set Status ▼	

Show Delivered

Page: 1

Order - Select - Workorder Details

- The Workorder Notes are located in the middle of the Workorder Details window. Touch/Click into the Notes field. **Type Notes.**
- Touch/Click the **OK** button.

Notes

Call the customer when the work order is completed.

Print OK

Order - Workorder Details – Workorder Notes

Print Workorder Copy

- Touch/Click the **Order** button on the Main Menu.
- Touch/Click the List Icon  on the invoice/workorder line item to open the details. **Demo Example: Inv: 437 – W/O #418.**

Order

Search Status Filter Vendor Filter 06/22/2019 07/22/2019 Reset

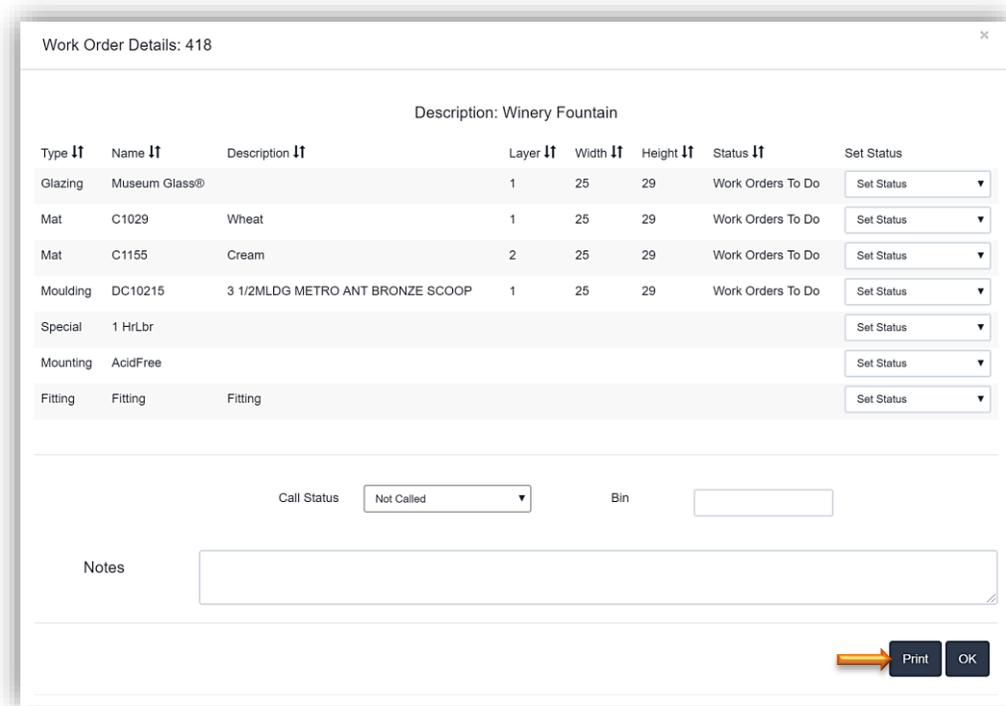
Invoice ↑↓	W/O ↑↓	Customer ↑↓	Created ↑↓	Due ↑↓	Paid? ↑↓	Status ↑↓	Set Status	CMC
 437	417	Charlie Brown	6/27/2019	7/11/2019	✓	InProgress	Set Status	
 437	418	Charlie Brown	6/27/2019	7/11/2019	✓	Work Orders To Do	Set Status	
 438	419	Carol Customer	6/27/2019	7/11/2019	✓	Assembled	Set Status	
 439	420	Betty Bevel	6/27/2019	7/11/2019	✓	Work Orders To Do	Set Status	
 440	421	Gladys Glazing	6/27/2019	6/28/2019	✓	Assembled	Set Status	
 441	422	Wally Wall	7/18/2019	8/1/2019	✓	InProgress	Set Status	

Show Delivered

Page: 1

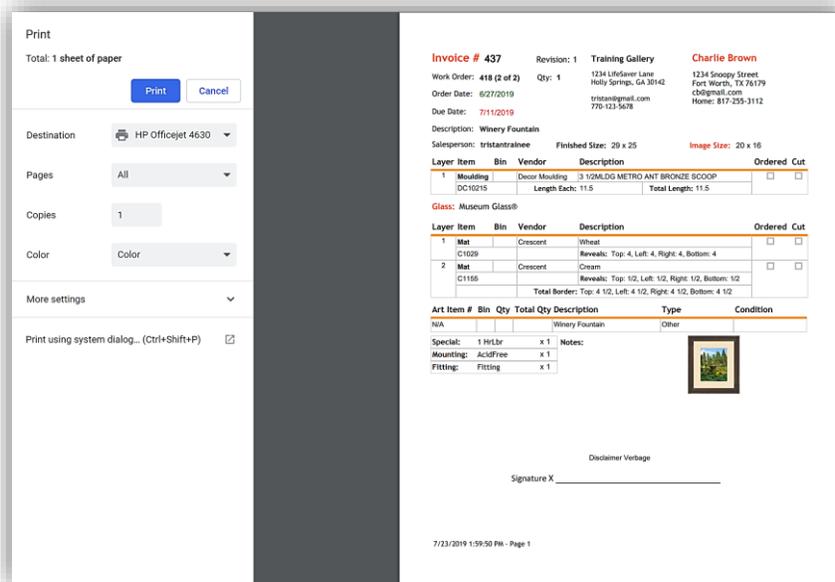
Order – Select Invoice/Workorder Details

3. Touch/Click the **Print Button** located mid right screen, to the left of the OK button.



Order – Workorder Details – Print Workorder Copy

4. **Print** the **Workorder**. After printing you will return to the Workorder Details window.
5. Touch/Click **OK** button or **X** to close the window and return to the Order screen.



Print Workorder

View Workorder & Component Production Status History

1. Touch/Click the **Order** button on the Main Menu.
2. Touch/Click the List Icon  on the invoice/workorder line item to open the details.
Demo Example: Inv: 441 – W/O #422.

Order

Status Filter ▼

Vendor Filter ▼

06/22/2019

07/22/2019

Reset

	Invoice ↑↓	W/O ↑↓	Customer ↑↓	Created ↑↓	Due ↑↓	Paid? ↑↓	Status ↑↓	Set Status	CMC
	437	417	Charlie Brown	6/27/2019	7/11/2019	✓	InProgress	Set Status ▼	
	437	418	Charlie Brown	6/27/2019	7/11/2019	✓	Assembled	InProgress ▼	
	438	419	Carol Customer	6/27/2019	7/11/2019	✓	Assembled	Set Status ▼	
	439	420	Betty Bevel	6/27/2019	7/11/2019	✓	Work Orders To Do	Set Status ▼	
	440	421	Gladys Glazing	6/27/2019	6/28/2019	✓	Assembled	Set Status ▼	
	441	422	Wally Wall	7/18/2019	8/1/2019	✓	InProgress	Set Status ▼	

Show Delivered

Page: 1

Order - Select - Workorder Details

3. The Workorder and Component Status History will display in the bottom third of the Work Order Details window. The Workorder Status History displays on the left and the Component Status History displays on the right. It will list the **Time** and **Date** of the production **Status Update**.

Work Order Status History			Component Status History			
Status	Date	User	Component	Status	Date	User
InProgress	Jul 19 2019 4:37PM	Tristan Trainee	C1000	Mat Cut	Jul 23 2019 4:05PM	Mat Cut
Work Orders To Do	Jul 18 2019 2:14PM	Tristan Trainee	C1085	Mat Cut	Jul 23 2019 4:05PM	Mat Cut
			I310-280	Frame Cut	Jul 23 2019 4:05PM	Frame Cut
			AcidFree	InProgress	Jul 19 2019 4:37PM	InProgress
			Museum Glass®	InProgress	Jul 19 2019 4:37PM	InProgress
			C1085	InProgress	Jul 19 2019 4:37PM	InProgress
			Fitting	InProgress	Jul 19 2019 4:37PM	InProgress
			1/2HrLbr	InProgress	Jul 19 2019 4:37PM	InProgress
			C1000	InProgress	Jul 19 2019 4:37PM	InProgress
			I310-280	InProgress	Jul 19 2019 4:37PM	InProgress

Order - Workorder Details – Workorder/Component Status History

Computerized Mat Cutter

Refer to the CMC instructions for Wizard and Valiani in the previous section.

Order

Search Status Filter Vendor Filter 06/22/2019 07/22/2019

	Invoice ↑↓	W/O ↑↓	Customer ↑↓	Created ↑↓	Due ↑↓	Paid? ↑↓	Status ↑↓	Set Status	CMC
☰	439	420	Betty Bevel	6/27/2019	7/11/2019	✓	Work Orders To Do	<input type="button" value="Set Status"/> <input type="button" value="▼"/>	<input type="button" value="↓"/> 

Order - Send to CMC

Package Pricing

Create pricing packages that include a selection of mouldings, mats, glazing and services for one price point.

1. Touch/Click the **Package Pricing** button on the main menu.

2. Create a **Name** for your package and type it in the field. Touch/Click the **Create** button. **Demo Example: Classic.**



Package Pricing

Classic

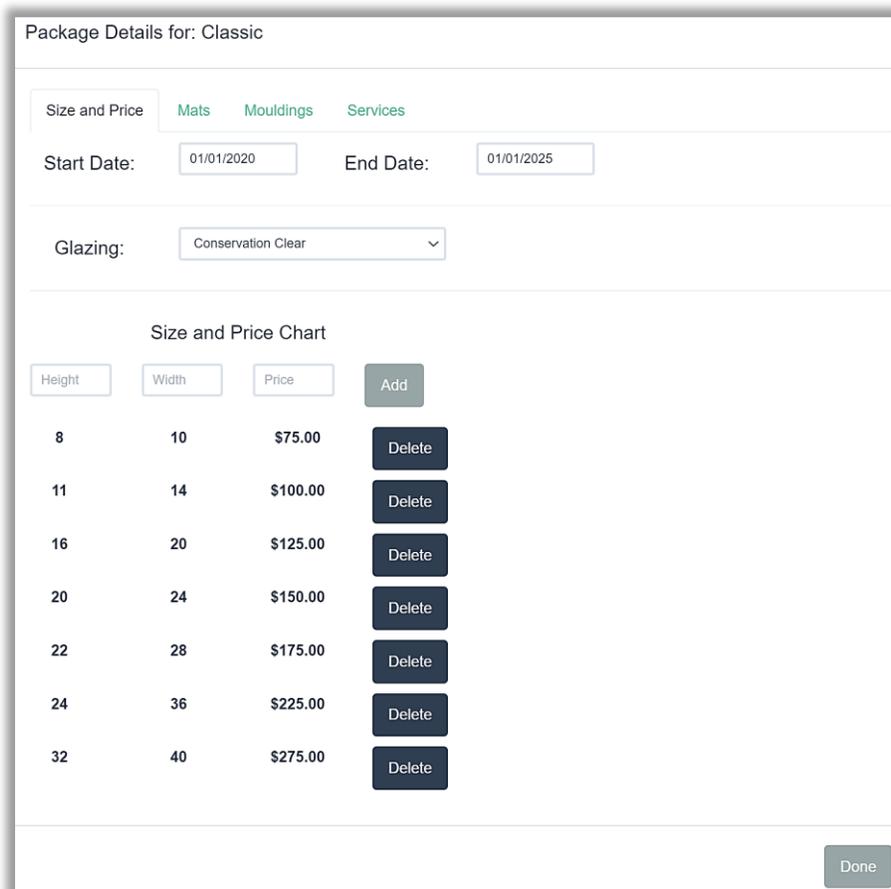
3. Add Package Details – **Size and Price Tab.**

a. Type **Start and End Dates.**

b. Select **Glazing Type** in the drop-down.

c. Enter **Package Sizes** and **Prices.** Type **Height.** Type **Width.** Type **Price.** Touch/Click **Add.** Repeat for additional sizes and prices. See demo image below.

d. To remove a line item. Touch/Click **Delete** button.



Package Details for: Classic

Size and Price **Mats** Mouldings Services

Start Date: 01/01/2020 End Date: 01/01/2025

Glazing: Conservation Clear

Size and Price Chart

Height	Width	Price	Add
8	10	\$75.00	Delete
11	14	\$100.00	Delete
16	20	\$125.00	Delete
20	24	\$150.00	Delete
22	28	\$175.00	Delete
24	36	\$225.00	Delete
32	40	\$275.00	Delete

Done

Package Details – Size & Price

4. Add Package Details – **Mats Tab**

- a. Touch/Click the **Mats** tab.
- b. Enter the **Number of Mats** that can be included in the framing order in the **# Field**.
- c. Add **Mat by Name**. Touch/Click into the field type **Item Number**. Touch/Click the **Add** button. The Mat will now display under the Current Package Mats Heading.
- d. Alternatively you can select a Vendor and Filter the list by Color or Partial Item Code. **Demo Example: Gray Crescent Mats**. Touch/Click the **Select Vendor** drop-down arrow. Touch/Click desired **Vendor**. Touch/Click the **Filter** field. Type Color or partial or full Item Code. Touch/Click the **Selection** box adjacent to your desired mat. Touch/Click the **Add** button. That Mat will display in the Current Package Mats list.

Package Details for: Classic

Size and Price Mats Mouldings Services

Mats 1

C3344 Add

Crescent Gray Add

<input type="checkbox"/>	C1002	Mist Gray
<input checked="" type="checkbox"/>	C1025	Medium Gray
<input type="checkbox"/>	C1027	Silver Gray
<input type="checkbox"/>	C1101	Neutral Gray
<input type="checkbox"/>	C1102	Vintage Gray
<input type="checkbox"/>	C1106	Antique Gray
<input type="checkbox"/>	C1117	Gray
<input type="checkbox"/>	C1186	Cool Gray
<input type="checkbox"/>	C1187	Essential Gray
<input type="checkbox"/>	C1304	Gray Pebbles
<input type="checkbox"/>	C1308	Urban Gray
<input type="checkbox"/>	C1553	Bar Harbor Gray
<input type="checkbox"/>	C1574	Dawn Gray
<input type="checkbox"/>	C1575	Copley Gray

Current Package Mats

C1000 Delete

Done

Add/Filter Mats Package

- e. Repeat for additional Mats.
- f. To remove a mat from the Package. Touch/Click the **Delete** button on the corresponding line item.

Package Details for: Classic

Size and Price Mats Mouldings Services

Mats 1

Add Mat by name Add

Select Vendor Gray Add

Current Package Mats

C1000 Delete

C1025 Delete

C1061 Delete

C1025 Delete

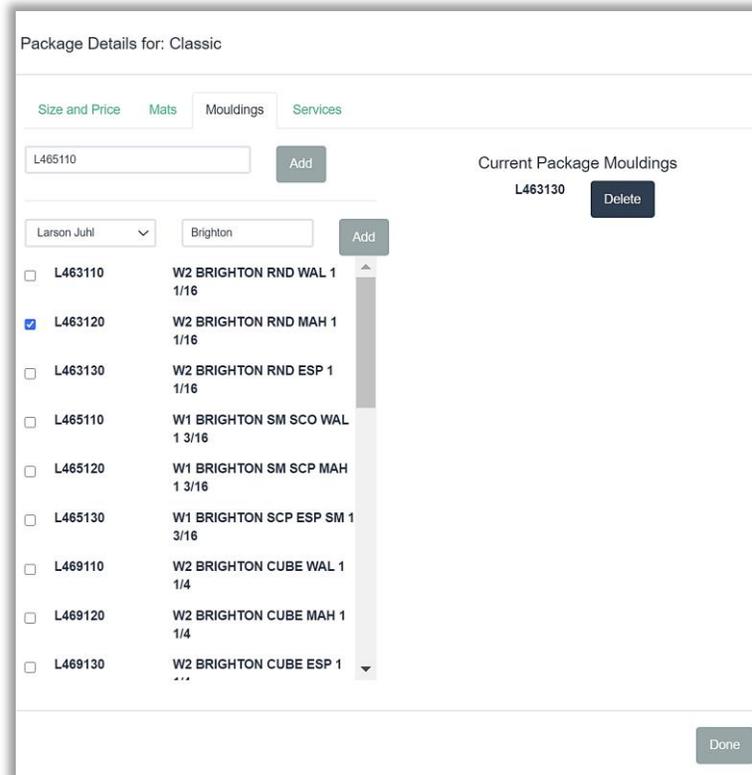
C961 Delete

Done

Completed Mats Package Details

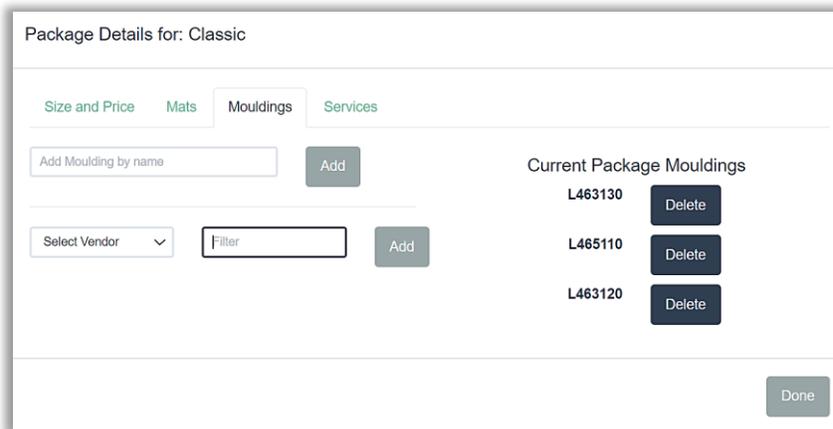
5. Package Details – Moulding Tab

- a. Touch/Click the **Moulding** tab.
- b. Add **Moulding by Name**. Touch/Click into the field. Type **Moulding Item Number**. Touch/Click the **Add** button. The moulding item number will display under the **Current Package Mouldings** heading.
- c. Alternatively, you can select a **Vendor and Filter** the list by Color, Name, Moulding Width or Partial Item Code. **Demo Example: Larson Juhl - Brighton**. Touch/Click **Vendor** drop-down arrow. Touch/Click **Vendor**. Touch/Click **Filter Field**. Type the **Filter**. Touch/Click **Selection Box** adjacent to your desired moulding. Touch/Click the **Add** button. The moulding will now display under the Current Package Mouldings.



Moulding Details - Add/Filter Mouldings

- d. Repeat for additional mouldings.
- e. To remove a moulding from the Package. Touch/Click the **Delete** button on the corresponding line item.



Completed Moulding Package Details

Live Moulding Inventory in the Workorder

Verify warehouse moulding availability in real time. Enable the feature in store configuration. The moulding companies included are Omega, Larson Juhl and Roma.

Omega

1. The out of stock warning will appear during the write order process, if you type an out of stock moulding item code into the moulding field.
2. Out of Stock pop-up alerts.
 - a. “The vendor’s warehouses are temporarily out of stock of this moulding. Would you like to proceed with using in-stock or wait for backordered moulding?” Select **Yes to Proceed** or **No, choose another**.
 - If you select **Yes, proceed**. Use in-store stock or call Omega to get a timeline on the backordered moulding.
 - If you select **No, choose another**. Type new moulding item code.

Moulding Warehouse Check

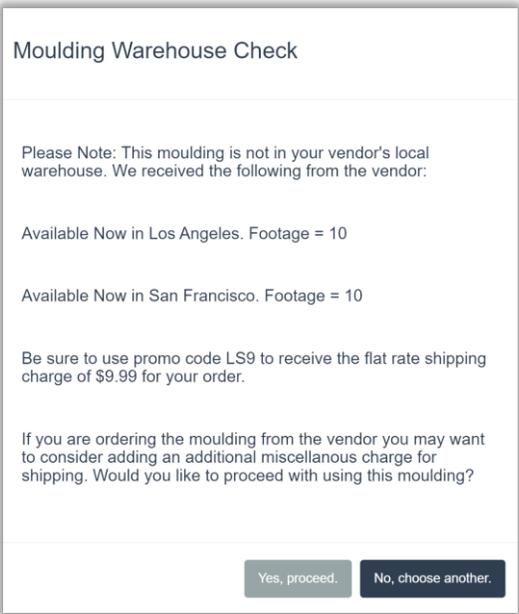
The vendor's warehouses are temporarily out of stock of this moulding: OM76289.

Would you like to proceed with using in -store stock or wait for the backordered moulding ?

Yes, proceed. No, choose another.

Omega Out of Stock Alert

- b. Please Note: This moulding is not in your vendor’s local warehouse. We received the following from the vendor. The alert will list the cities and footage available. Be sure to give Omega the promo code LS9 to receive the flat rate shipping charge of \$9.99 for your order. If you are ordering the moulding from the vendor you may want to consider adding an additional miscellaneous charge for shipping. Would you like to proceed with using this moulding?
 - Select **Yes to proceed** with the write order.
 - Select **No, choose another**. Type in new moulding item code.

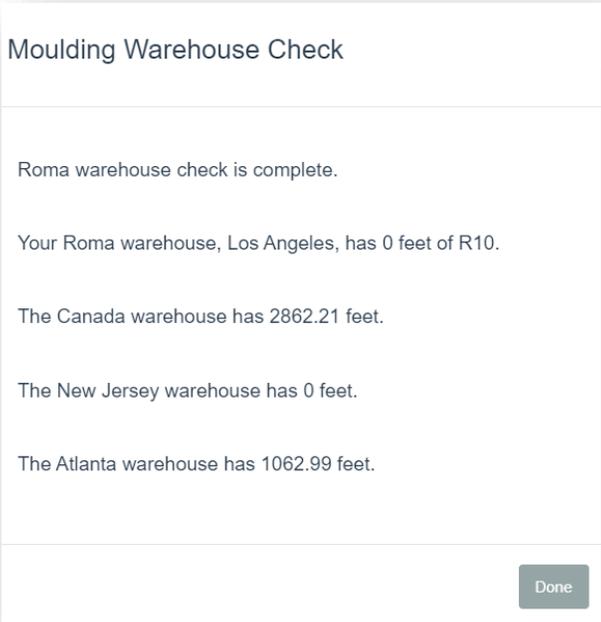


Omega Moulding Warehouse Check

Roma & Larson Juhl

- 1. The out of stock alert will appear during the write order process, if you type an out of stock moulding item number into the moulding field.
- 2. The alert will state that your local warehouse does not have enough available to complete your order. It will list what other warehouse locations have stock. Call Roma or Larson Juhl to get a timeline of when they will receive the moulding or to see if it is possible to order from another warehouse location.

Note: The below image is a Roma Warehouse Check Alert. Larson Juhl's alert is similar and will list if it is available in the Atlanta warehouse or Central warehouse.



Art Copy

Enable the option in the settings tab under the Store Configure menu. The Art Copy is located on the bottom of the workorder. Detach and adhere the copy to the artwork for identification purposes.

Betty Bevel		Size: 22 X 22		mld. 1 R103256	mld. 2
WO#: 572		Mat / Fillets		9.5 bin	bin
Due Date: 4/8/2022 Phone: (404) 785-4512		#1 C1000	#5	mld. 3	mld. 4
Friday Work:		#2	#6	bin	bin
		#3	#7	Museum Glass®	
		#4	#8		mld. 5
					bin

Art Copy

Browse Invoices

Will display your latest invoices. Select the last 10, 30 or 50 invoice to view or edit.

1. Touch/Click **Browse Invoices**.
2. Touch/Click the number of invoices you would like to view. **Ten, Thirty or Fifty**. Default is 10. Click on the page number arrow to view additional pages.
3. Touch/Click the **Open** button on the invoice line item you would like to view/edit.
4. The following options will be available if the workorder/invoice has not been delivered.
 - a. View
 - b. Partial Edit
5. Touch/Click the **Print** button to print the **Invoice**.

Browse Invoice										
Invoice #	Revision	Date	First Name	Last Name	Company	Total	Description	Status	Open	Print
713	1	2/27/2025	Gladys	Glazing	Gladys and Company	\$1,256.11	Aqua Blue Ready Made Frame 8x10	Delivered	Open	Print
712	1	2/26/2025	Teddy	Bear		\$25.00	Aqua Blue Ready Made Frame 8x10	Delivered	Open	Print
711	1	2/21/2025	Betty	Bevel		\$26.75	Aqua Blue Ready Made Frame 8x10	Delivered	Open	Print
710	1	2/20/2025	John	Customer		\$26.75	Aqua Blue Ready Made Frame 8x10	Delivered	Open	Print
709	1	2/19/2025	Arti	Artist	Print Company	\$515.62	Flowers	Work Orders To Do	Open	Print
708	2	2/19/2025	Teddy	Bear		\$923.14	Flowers 65	Work Orders To Do	Open	Print
707	2	2/19/2025	Teddy	Bear		\$363.58	Sunset	Work Orders To Do	Open	Print
706	2	2/19/2025	Teddy	Bear		\$937.32	Bouquet 25	Work Orders To Do	Open	Print
705	2	2/19/2025	Gladys	Glazing	Gladys and Company	\$876.00	Flowers	Work Orders To Do	Open	Print
704	2	2/19/2025	Charlie	Brown		\$2,718.12	Mountains	Work Orders To Do	Open	Print

« Page 1 »

Print Barcode Product Labels

Print barcode labels for your moulding, mats and inventory items with the Dymo LabelWriter Printer.

Supplies Needed

Recommended Dymo Printer:

- Dymo Model No. 8683 Wireless Printer.
- Dymo LabelWriter 450 series or newer.

Note: The following retailers sell the Dymo: Uline, Amazon, Staples, Office Depot/Max. Just do a Google Search.

Dymo® LabelWriter® Wireless Printer



Quickly print mailing, inventory and office labels

- 300 dpi. Power and USB cables included.
- Built-in WiFi connects to your Mac, PC, tablet or smartphone.
- 71 labels per minute.
- For labels up to 2.3" wide.
- Requires Windows® (7 or later) or Mac OS® X (v10.10 or later).
- Compatible with [Dymo®](#) and [Uline Mini Printer Labels](#), sold separately.

[More Images](#)

MODEL NO.	DESCRIPTION	RECOMMENDED USES	MAX. LABEL SIZE W x L	LABELS/ MIN.	PRICE EACH		IN STOCK SHIPS TODAY
					1	2+	
H-8683	Dymo® Wireless	Address, File, Folder, Barcode, Name Badges	2.3 x 10"	71	\$230	\$220	<div style="display: flex; align-items: center; justify-content: center;"> <input style="width: 40px; border: 1px solid #ccc;" type="text"/> ADD </div>

2 YEAR WARRANTY

Optional Wireless Barcode Scanners

Alacrity QR Mini Barcode Reader or any compatible barcode reader. You can also use most new barcode scanners that can read Code 39 and Full ASCII. To setup the scanner all you should need to do is to either plug in the scanner if it is USB or enable Bluetooth if the scanner is wireless.

Note: Checkout Amazon or do a Google Search for Barcode Scanners.

Labels Required

DYMO 30251 – 1 1/8 x 3 1/2, 28mm x 89mm or Dymo 30336 – 1 x 2 1/8

You can now print labels for inventory, mats, and mouldings. The option will not be active unless the Dymo software is installed.

You can get it here:

<https://www.dymo.com/support?cfid=user-guide>

1. Click on 'Latest Software & Drivers'.
2. Click on The Latest Software & Drivers for LabelWriters and LabelManager.
3. Choose Download for MAC or Windows.

Note: *Not available for tablets.*

Downloads: Software, Drivers & User Guides

The Latest Software & Drivers for all LabelWriters® and LabelManager®

Supports all LabelWriter® 5 series, 450 series, 4XL, and LabelManager® 640CB, 280, 420P and 500TS®



Mac

DYMO Connect for Desktop macOS v1.4.8

*compatibility starts from macOS 11 to higher.

[Download](#)



Windows

DYMO Connect for Desktop Windows v1.4.8

*compatibility starts from Windows OS 10 to higher.

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4. After installing the Dymo Software.
 - Open the **Dymo** software on your computer.
 - Go to **File**.
 - Click on **Add Network Printer** it should find your Dymo printer on the network for you to select.
 - You should see the printer connected at the bottom of the Dymo software.

Print Barcode Labels

1. The label print option is visible when you click on Mat, Moulding or Inventory buttons on the main menu screen. The option will be active only if the software is installed.
2. Touch/Click the **Print Label** button on the desired line item. The Dymo will print the label. Continue the process for additional barcode labels.

Note: The Print Label button will be the same shade of gray as the other buttons on your screen. The demo program does not have the Dymo Software installed.

Select Vendor: International Moulding

Moulding Search: Search...

Create Moulding Add Vendor

Name	Description	UPC	Details	Print Label
I0354-3029	1 1/2 Mahogany Reverse Stairs	0	Details	Print Label
I0354-3086	1 1/2 Walnut Reverse Stairs	0	Details	Print Label
I100-50	3 1/8 Dk Walnut Panel / Dk Gold	0	Details	Print Label
I1100-50	1x3 Black Tall Cap	0	Details	Print Label
I1100-55	1x3 Silver Tall Cap	0	Details	Print Label
I1100-60	1x3 Gold Tall Cap	0	Details	Print Label
I1100-65	1 5/8 Flat Silver Leaf w Red Lines	0	Details	Print Label
I1100-70	2 1/8 Scoop Silver Flat Panel	0	Details	Print Label

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Moulding Mat - Print Barcode

Inventory

Number	Title	Description	Supplier	Quantity	Retail				
A1234	The Italian Villa	The Italian Villa - Print - 20x18		<input type="text" value="216"/>	\$350.00		Edit	Print Label	Deactivate Upload
CB1234	Confetti Bouquet II	18x18 Print by Erica June Vess		<input type="text" value="62"/>	\$187.50		Edit	Print Label	Deactivate Upload
F1234	The Winding Creek	Print	Artist Gallery	<input type="text" value="252"/>	\$225.00		Edit	Print Label	Deactivate Upload
G1234	Old Aqua Door	Print	Prints R Us	<input type="text" value="24"/>	\$125.00		Edit	Print Label	Deactivate Upload
H1234	River in Fall	The Creek 16x20 Art Print	The Art Company	<input type="text" value="252"/>	\$250.00		Edit	Print Label	Deactivate Upload
J1234	Boy with Red Wagon	Photo	Smith's Photography	<input type="text" value="23"/>	\$50.00		Edit	Print Label	Deactivate Upload
B1234	Ready Made Frame 8x10	Aqua Blue Ready Made Frame 8x10	Frames R Us	<input type="text" value="5"/>	\$25.00		Edit	Print Label	Deactivate Upload
D1234	Vanilla Candle	Vanilla Scented - Color : Cream - Pillar Size 3x6		<input type="text" value="11"/>	\$30.00		Edit	Print Label	Deactivate Upload
k1234	Black Frame 5x7	Black Frame 5x7		<input type="text" value="15"/>	\$15.00		Edit	Print Label	Deactivate Upload
E1234	Hanger	Color: Silver	Hangers R Us	<input type="text" value="47"/>	\$10.00		Edit	Print Label	Deactivate Upload
zzzz	metal sheet	11x14 metal sheet		<input type="text" value="250"/>	\$50.00		Edit	Print Label	Deactivate Upload

Inventory - Print Barcode

Print/Activate Existing Barcode Labels on Inventory Items

If you order or have Inventory Items that already have barcodes on them, you can activate those existing barcodes.

Create an Inventory Item then go into EDIT. Click into the UPC field then scan the barcode that is affixed to the item.

1. Create a new inventory item or edit a current inventory item. On the Add/Edit Inventory Screen touch/click the UPC field.
2. Scan the barcode label affixed to the inventory item. This will connect that barcode to the item, so the next time the item is sold the program will automatically recognize that barcode.