



# LSS Cloud

## Write Order & Invoice Quick Reference Guide

## Workorder

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

- **Note:** The custom frame order demo example reflected in the instructions contains a 20x18 image size, moulding (L310-280), 4 inch mat reveal, mat (C1061), fillet (R121), mat (C1085), museum glazing, reverse bevel, acid free mounting, 20x18 art print and 10% discount.

For more detailed instructions, please refer to the LSS Cloud User Manual.

Write Orders

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

### 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 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.

2. Touch/Click the **Description** field and type the **Art Description/Title**. **Example:** Smoky Mountains

3. Touch /Click the **Art Condition** button. Touch/Click on a **Condition Type** in the pop-up list to specify the condition of the art. Touch/Click/Drag scroll bar to view additional art conditions. Touch/Click the **OK** button. **Example:** Good/No Damage

**Tip:** Can select more than one art condition. To remove selection, click on the selected art condition type to de-select.

4. Touch/Click the **Art Type** button. Touch/Click on the **Medium to Specify Art Type** in the pop-up list. Touch/Click the **OK** button. **Example:** Print

**Tip:** Can select more than one art type. To remove selection, click on the selected art type to de-select.

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

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.



6. **Image Size**

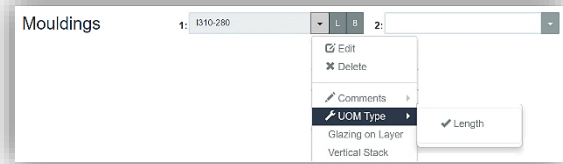
- a. Touch/Click Height field and **Type in the Height Measurement**. **Example:** 20'
- b. Touch/Click Width field and **Type in the Width Measurement**. **Example:** 18'

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

7. **Finished Size** is located to the right of the H x W fields. The size will adjust as you add components.

**Moulding and Mat Item Number Fields:** You will enter your mouldings, fillets and mats into the workorder from outermost to inner most layers.

8. Touch/Click **Moulding Field**. Type the moulding item number. **Demo Example:** I310-280. The unit of measure type and length needed will display to the right of the moulding field drop down arrow.



**Moulding Options**

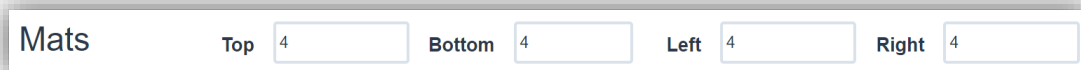
Each **Moulding** field has the available **Options:** Edit – Delete – Comments – UOM Type – Glazing on Layer & Vertical Stack. To access - Touch/Click on field arrow to the right of the moulding item number to access.

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

10. **Mat Reveal:** Touch/Click the **Top** reveal field under the “Mats” heading. Type **Number of Inches**. Repeat for **Bottom, Left and Right** reveal fields. **Demo Example:** 4 Inches.

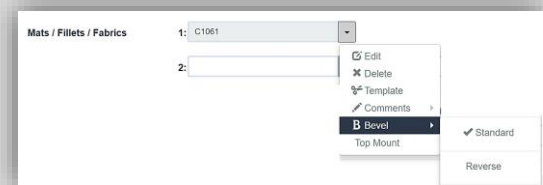
### Tips

- a. **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.
- b. **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.
- c. To **Edit** any of the Top, Bottom, Left or Right reveals. Touch/Click into field, backspace current number to remove and type new measurement into the field.



11. Touch/Click on the **Mat** field. Type **Mat Item Number**. **Demo Example: Mat:** C1061 – Reverse Bevel

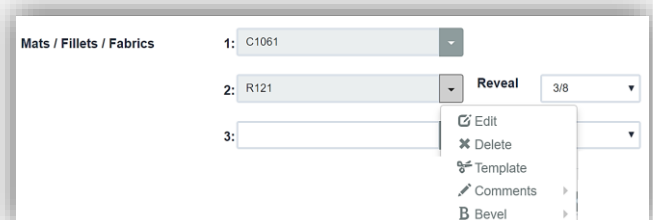
Each **Mat** field has the available **Options:** Touch/Click on the mat **Field Drop Down Arrow** to access. Edit – Delete – Template -Comments – Bevel (Standard or Reverse) – Top Mount.



**Mat Options**

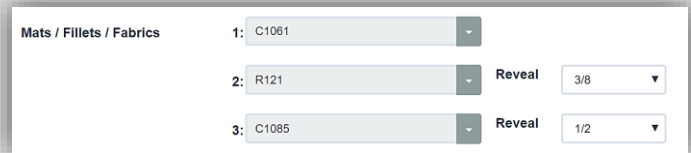
Touch/Click **Bevel**. Touch/Click **Reverse**.

12. A 2<sup>nd</sup> Mat/Fillet field will populate. Touch/Click **2nd field** and **type the next Mat/ Fillet item number if applicable**. **Demo Example:** Fillet R121. The Fillet reveal field will contain the fillet’s width. To **Edit Width** touch/click the drop-down arrow. touch/click actual width.



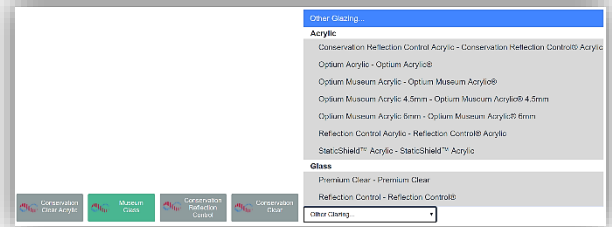
The Fillet field contains the following **Options:** Touch/Click on the mat **Field Drop Down Arrow** to access. Edit – Delete – Template (N/A) – Comments & Bevel (N/A). The workorder will take unlimited mat/fillet item numbers.

13. A 3<sup>rd</sup> mat/fillet field will display. Touch/Click 3<sup>rd</sup> mat/fillet field and type mat item number **C1085**.



14. Select **Glazing**

- a. The program defaults to TruVue Museum glazing.  
**Demo Example: Museum**
- b. To select preferred TruVue glazing type other than Museum. Click/Touch one of the following glazing types: **Conservation Clear Acrylic, Conservation Reflection Control, Conservation Clear or No Glazing.**
- c. 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.

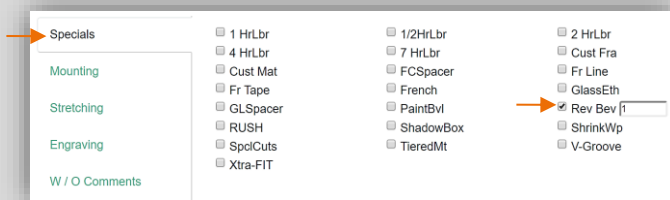


15. Select corresponding **Additional labor** and **Material Costs** under the **Specials, Mounting and Stretching** tabs.

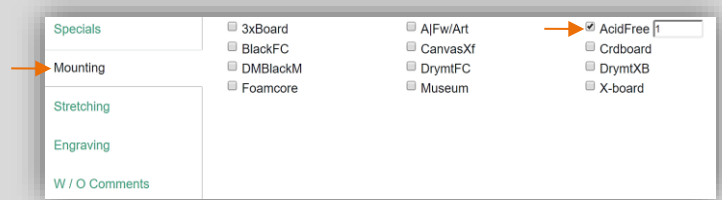
**Demo Example: Specials-Reverse Bevel / Mounting – Acid Free**

- a. Touch/Click in the **Field** adjacent to the preferred Labor/Material option to select.
- b. If the **Quantity** is greater than one, Touch/Click on the quantity up/down field arrows to select desired quantity.
- c. Touch/Click **Reverse Bevel** listed under the **Specials Tab**.
- d. Touch/Click the **Mounting Tab**. Touch/Click **Acid Free**.

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



**Specials - Reverse Bevel**

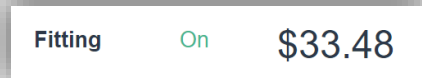


**Mounting - Acid Free**

16. Touch/Click on the **W/O Comments Tab**. Type additional instructions or notes that pertain to the workorder in the field.

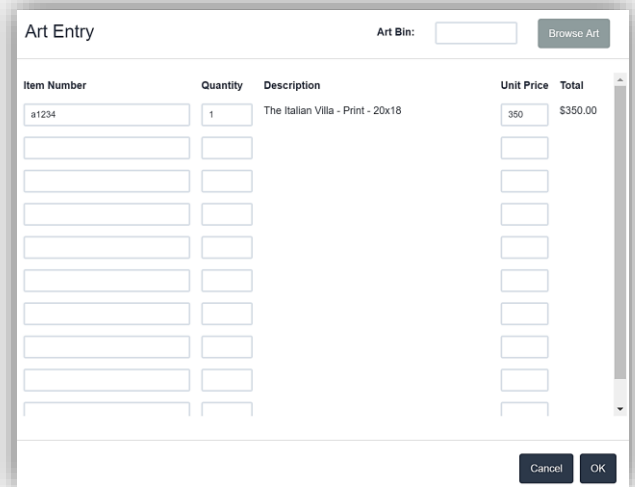


17. **Fitting Fee** located in the Totals column: Toggle on or off by Touching/Clicking the Blue **On/Off** located to the left of the fitting fee dollar amount.



**Note:** Refer to the LSS Cloud User Guide for Fitting Fee instructions.

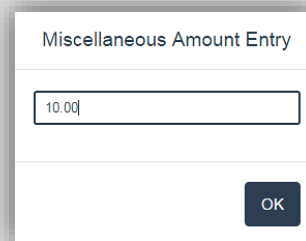
18. Add **Art to Workorder**: If you are selling the art you are custom framing, it can be added to the corresponding workorder. The art has to have been previously added to the inventory menu. **Demo Example:** *The Italian Villa Art Print – Item: A1234*



- Touch/Click on **Art +** in the Totals column.
- Type the art's **Item Number A1234** 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.
- Type **Quantity 1**.
- Unit Price \$250.00 will auto fill with the price that was previously programmed.
- Touch/Click the **OK** button.

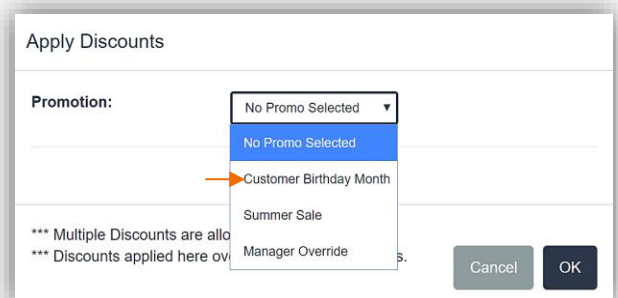
19. Add a **Miscellaneous \$ Amount** to the workorder.

- Touch/Click **Misc +** located in the Total column.
- Miscellaneous Amount Entry** pop up window will display.
- Type the desired **\$ Amount** into the field.
- Touch/Click **OK**.



**Note:** Not used in demo example.

20. Touch/Click on **Discount +** at the bottom of the Totals column to apply a **Promotion or Manager Override Discount**. Touch/Click the **Promotion Drop Down Arrow**. Touch/Click **Discount Type** to be applied to the workorder.



a. **Promotion:** Must be created previously under the Promotion button on the Home screen.

- Touch/Click the **Promotion** drop down arrow.
- Touch/Click the **Promotion Type** in the list.
- **Demo Example** shown right in discount window is *Customer Birthday Month and Summer Sale*.
- Touch/Click **Customer Birthday Month**.
- The Apply Discounts window displays and reflects that the promotion discount is 15% off the entire workorder.
- Touch/Click **OK** to apply.

The screenshot shows the 'Apply Discounts' window. At the top, the 'Promotion' dropdown is set to 'Customer Birthday Month'. Below this, there are several rows for different categories: 'This Workorder', '2nd Discount', 'Mouldings', 'Mats', 'Fabric', 'Glazing', 'Mounting', 'Special Labor', and 'Art'. Each row has a text input field and a 'Percentage' dropdown menu. An orange arrow points to the '15' entered in the 'This Workorder' field. At the bottom, there is a 'Fixed Ticket Price' field and two buttons: 'Cancel' and 'OK'. A note at the bottom states: '\*\*\* Multiple Discounts are allowed. \*\*\* Discounts applied here override individual discounts.'

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. Manager Override authority can be selected/de-selected in the Store Configuration menu under the settings tab.

- Touch/Click the **Promotion** drop down arrow.
- Touch/Click **Manager Override** in the drop-down list.
- Touch/Click **Reason Code** in the drop-down list. **Demo Example:** *Discretionary Discount*.
- 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. Percentage is the default selection.
- Touch/Click on the type of discount you would like to apply: **Percentage or Fixed Amount**.
- Demo Example: This Workorder 10%. Type **10** in the This Workorder field. Percentage is the default.

This screenshot shows the 'Apply Discounts' window with the 'Promotion' dropdown menu open. The menu options are: 'No Promo Selected', 'Customer Birthday Month', 'Summer Sale', and 'Manager Override'. An orange arrow points to 'Manager Override'. The rest of the window is partially obscured by the dropdown menu.

The screenshot shows the 'Apply Discounts' window. The 'Promotion' dropdown is set to 'Manager Override'. Below it, the 'Reason Code' dropdown is set to 'Discretionary Discount'. The 'This Workorder' field contains '10' with an orange arrow pointing to it. Other categories like '2nd Discount', 'Mouldings', 'Mats', 'Fabric', 'Glazing', 'Mounting', 'Special Labor', and 'Art' are listed with empty input fields and 'Percentage' dropdowns. At the bottom, there is a 'Fixed Ticket Price' field and 'Cancel' and 'OK' buttons. A note at the bottom states: '\*\*\* Multiple Discounts are allowed. \*\*\* Discounts applied here override individual discounts.'

- Touch/Click **OK**.
- If the employee does not have Manager Override authority they will receive a prompt that requires an Authorized User Name and Password login.
- Authorized User: Type Username and Password. Touch/Click Ok button.

Manager Override

Username:

Password:

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

21. The following options are now available:

- Add To Invoice:** Touch/Click this button to save/complete the workorder and add it to the invoice.
- Clear:** Touch/Click this button to clear workorder screen. You will not be able to recover workorder.
- Repeat:** Touch/Click this button to copy the current workorder on the screen. This will add the current workorder on the screen to the invoice, but the invoice window does not display until the repeated workorder is added to the invoice.
- Upload Image:** Touch/Click to select image from your FrameVue App, Picture Library or Web Cam. This option is available with the FrameVue Visualization package.

The screenshot shows the main workorder configuration screen. It includes a description field (2), image size inputs (6), mouldings selection (8), mats configuration (10), and a list of mats/fillets/fabrics (11-13). At the bottom, there are glazing options (14), a specials menu (15), and a list of options (16). On the right, a Totals... section lists various components and their costs (17-20). At the bottom right, there are four action buttons: Add To Invoice (21a), Clear (21c), Repeat (21b), and Upload Image (21d). Callouts 3, 4, and 5 point to buttons at the top of the screen.


22. Touch/Click the **Add to Invoice** button.

## Create Invoice

Add additional workorders or store inventory items such as; Art, Readymade 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.

- **Note:** The invoice example reflected in the instructions contains an 8x10 Readymade Frame and Shipping Charge of \$20.00.

23. When you Touch/Click the Add to Invoice button the Gray Invoice window will display on the screen. Currently the invoice reflects our “Smoky Mountains” **custom workorder on line 1**.

**Note:** You can also access the gray Invoice Window by Touching/Clicking the Invoice Icon  located in the top right blue menu bar if you do not have a framing order, just gift items, misc. charges, etc.

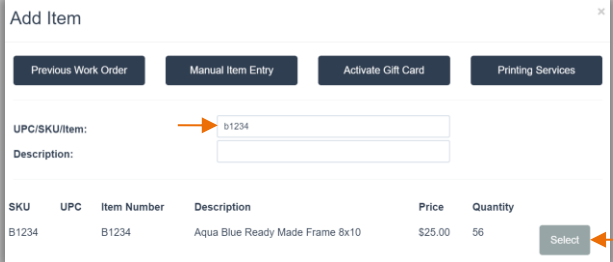
24. Touch/Click **Add Item** button.

25. The following **Options** are available in the Add Item window.

- **New Custom Frame Job:** Add an additional Custom Frame Workorder(s). (Unlimited) Touch/Clicking this button will take you back to the workorder screen, so you are able to enter the next workorder.
- **Manual Item Entry:** Add an Item/Fee/Service to the invoice that is not currently programmed in your inventory.
- **Add an Art/Gift** item to the invoice that is currently programmed into your inventory.

26. Add **Art/Gift** item.

- **Workorder Example:** 8x10 Ready-Made Frame
- Touch/Click and complete one of the following fields to search and add your item to the invoice; **SKU/UPC/Item Number or Description**.
- Touch/Click the **UPC/SKU/Item 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.
- Touch/Click on the **Select** button on the line item that you would like to add to the invoice.
- The Frame will list in the invoice window on **Line 2**.



SKU	UPC	Item Number	Description	Price	Quantity
B1234		B1234	Aqua Blue Ready Made Frame 8x10	\$25.00	56

Add Item

27. Add additional **Items Manually** to the invoice that are not a part of your store inventory records.


**Example:** Shipping Charge: \$20.00

- Touch/Click **Add Item** button in the Invoice window.
- 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.
- Touch/Click Description field to type “**Shipping Fee**” in the **Description Name**.
- Touch/Click the Unit Price Field to type **Price (\$20.00)** of item.
- Touch/Click Unit Discount field and enter \$ Discount Amount if applicable.



The following **Line Item Options** are available in the Invoice Window.

28. **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.

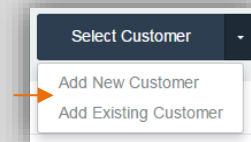
29. **Edit Line:** Touch/ Click on the **Edit** icon  on the line item you would like to change the data.

- Inventory Items and Manually Entered Item lines: Touch/Click into Field to Edit. The only fields eligible for editing are white in color.
- Custom Frame Workorder: Quantity can be adjusted on the line item. The workorder will display in the workorder screen below the invoice window. 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.

**Note:** To edit Description or Image Size, Touch/Click into field to change data. To edit Moulding or Mats, Touch/Click the 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.

30. **Delete line:** Touch/Click **Delete** icon  on the line item you would like to delete.

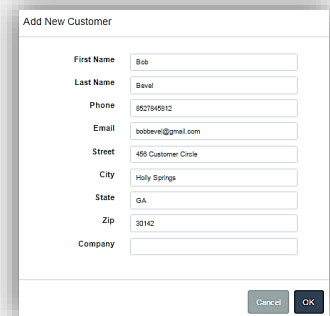
31. Touch/Click **Select Customer** button's drop down arrow. Options available are **Add New Customer** or **Add Existing Customer**.



Select Customer Drop Down Menu

32. New Customers: Touch/Click **Add New Customer:** Click/Touch fields to type **First, Last Name, Phone, Email, Street, City, State and Zip**. 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.

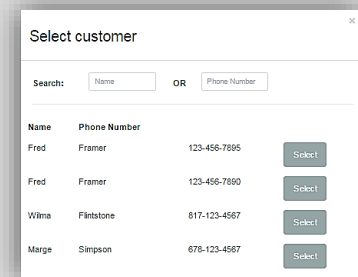


Field	Value
First Name	Bob
Last Name	Bevel
Phone	8527945812
Email	bobbeve@gmail.com
Street	456 Customer Circle
City	Holly Springs
State	GA
Zip	30142
Company	

Add New Customer Profile Window

33. Existing Customers: Touch/Click **Add Existing Customer**. Touch/Click on **Select button** on the **line** that contains the **customer's name** in the list or **Search** for existing customers by **Name or Phone Number**.

**Note:** Must use the hyphen symbol when searching by phone number.



Name	Phone Number	Action
Fred	Framer 123-456-7895	Select
Fred	Framer 123-456-7890	Select
Wilma	Flintstone 817-123-4567	Select
Marge	Simpson 678-123-4567	Select

Select Existing Customer Window

34. Customer's name will display in the upper right corner of the invoice window.

The screenshot shows an invoice window titled "Invoice" with a "Not Saved" status. It features a table with columns: No., Qty, SKU, Description, Unit Price, Unit Discount, Total Discount, Subtotal, Tax, and Total. The table contains three items: "Custom Frame", "Aqua Blue Ready Made Frame 8x10", and "Shipping". Below the table are buttons for "Add Item", "Select Customer", and "Save". The customer name "Bob Bevel" is displayed in the top right. Numbered arrows (23-35) indicate specific UI elements: 23 points to the item list, 24 to "Add Item", 26 to the second item's SKU, 27 to the third item's description, 28 to the "Tax Exempt?" checkbox, 29 to the customer name, 30 to the edit/delete icons, 31 to "Select Customer", and 35 to "Save".

No.	Qty	SKU	Description	Unit Price	Unit Discount	Total Discount	Subtotal	Tax	Total
1	1	Custom Frame	The Italian Villa	\$1017.11	\$101.71	\$101.71	\$915.40	\$50.08	\$965.48
2	1	B1234	Aqua Blue Ready Made Frame 8x10	\$25.00	0	\$0.00	\$25.00	\$1.75	\$26.75
3	1		Shipping	20	0	\$0.00	\$20.00	\$1.40	\$21.40
Totals				\$1062.11		\$101.71	\$960.40	\$53.23	\$1013.63

Invoice Window – Arrows with numbers represent instructional steps.

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

36. The following popup window will appear. Would you like to save this as a **Quote or Live** Invoice?

- Touch/Click the *Quote* button to Save the Invoice and Print the Quote.
- Touch/Click *Invoice* to proceed to the Accept Payment screen.

The popup window contains the text "Would you like to save this as a Quote or live Invoice?" and two buttons: "Quote" and "Invoice".

Save the Invoice

**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.

The popup window contains the text "A customer was not selected.. How would you like to proceed?" and three buttons: "Add Existing Customer", "Add New Customer", and "Proceed Without a Customer".

Add/Select Customer Prompt

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

- **Print or Email Invoice.** Invoice will show a full balance due since payment has not been received.
- **Print Workorder.**
- **Print All.**
- **Take Payment. Yes or Done.** Select **Yes**.

The popup window displays three sections: "Invoice 595" with "Print" and "Email" buttons; "WO: Smoky Mountains" with a "Print" button; and "Take Payment?" with "Yes" and "Done" buttons.

Print Forms or 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. Most recent invoice is listed at the top.

- Invoice #
- Subtotal: Before Tax
- Tax
- Discount: Discount amount applied to the invoice.
- Total: Total amount due for entire invoice.
- Payments Made
- Balance Due: Current amount due on the invoice.
- Pending Payment Field: Enter Amount to be applied to the invoice.

38. Type applicable Payment Amount(s) in the Pending Payment Field(s).

- **Example Workorder/Invoice:** Type \$894.04 in the Pending Payment field for Invoice 174.

### 39. Split Invoice Option

- Touch/Click **Details Button** to the right of the pending payment field to apply the payment to individual line items within an invoice.
- See example image to the right: Customer paid in full for \$26.75 photo frame and placed a \$350.00 deposit on workorder.

Description	Price	Payment Amount
The Italian Villa - Work Order: 212	\$935.27	0
Manual Entry - Shipping	\$21.40	0
Supply - Aqua Blue Ready Made Frame 8x10	\$26.75	0

Details Window

40. **Outstanding Balance:** Amount due for all of the customer's invoice(s).

## Payment Types

41. **Cash**

42. **Check**

43. **Credit Card: Visa, MasterCard, American Express & Discover**

44. **Other: Write Off, Charge Account, Groupon, Frame Club.**

**Note: See LSS Cloud User Guide for detailed instructions.**

45. **Workorder 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 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, payment type received, today's date and payment amount.

46. 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 new tender type selected.

47. Touch/Click **Apply Payment(s)** button.

48. **Payment History:** Displays customers previous payments in your store.

**Note:** *Payment History will not display if the customer is new.*

49. **Main Menu:** Go back to Home Screen. The invoice is saved, but no payment has been processed. (Example: N/A)

50. Touch/Click the **Print Forms** button to Print Invoice and Workorder.

**Accept Payment** Customer: Bob Bevel

Invoice #	Subtotal	Tax	Discount	Total	Payments Made	Balance	Pending Payment	Details
Invoice 174	\$849.44	\$44.60	\$89.38	\$894.04	\$0.00	\$894.04	\$894.04	Details
Invoice 173	\$25.00	\$1.75	\$0.00	\$26.75	\$0.00	\$26.75	0	Details
Invoice 163	\$815.47	\$57.09	\$0.00	\$872.56	\$815.56	\$57.00	0	Details
Invoice 139	\$452.59	\$31.68	\$50.29	\$484.27	\$0.00	\$484.27	0	Details
Invoice 72	\$210.58	\$14.74	\$0.00	\$225.32	\$224.64	\$0.68	0	Details

Outstanding Balance (All Invoices)

**Pending Payments**

Remove 5 Invoice(s): Cash 10/25/2016

Main Menu Print Forms Other Cash Check Credit Card Apply Payment(s)

**Payment History**

Refund	Invoice(s)	Payment Method	Date	Amount	Status
Refund 1	Invoice(s): 163	Cash	10/8/2016	\$815.56	✓
Refund 2	Invoice(s): 72	Cash	8/11/2015	\$25.00	✓
Refund 3	Invoice(s): 72	Cash	12/18/2015	\$200.32	✓
Refund 4	Invoice(s): 72	Cash	12/18/2015	\$0.68	✓

**Accept Payment Screen – Arrows with numbers represent instructional steps.**

51. What would you like to print? Touch/Click the **Print** button under Print Invoice? Heading.

What would you like to print?

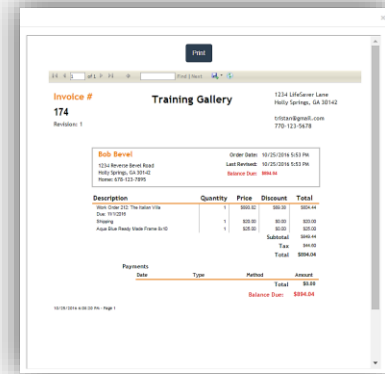
Invoice #	Print Invoice?	Print Work Order?
Invoice 174	Print	Print WO:212
Invoice 173	Print	
Invoice 163	Print	Print WO:203
Invoice 139	Print	Print WO:173
Invoice 72	Print	Print WO:93

Done

**Print Forms Window**

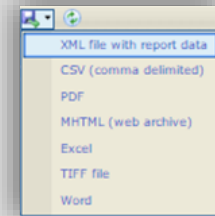
52. **Invoice Preview Options.**

- **Print:** Touch/Click the **Print** button.



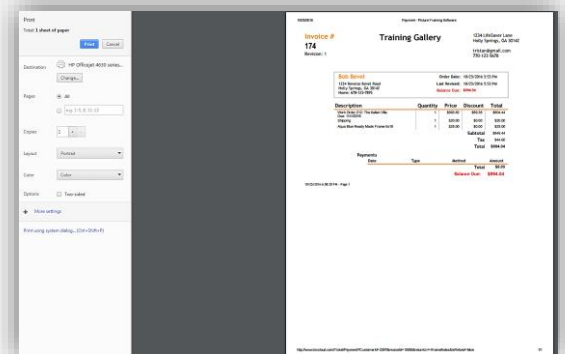
Invoice Preview – Print/Export

53. **Export: Export and Save** the invoice copy to a PDF or Word document. This will give you the opportunity to email the invoice to the customer if desired. Touch/Click Save Icon drop down arrow.. Touch/Click PDF or Word in list. Open document. Save. There is another opportunity to save the document in the printer preview screen.



Export Invoice

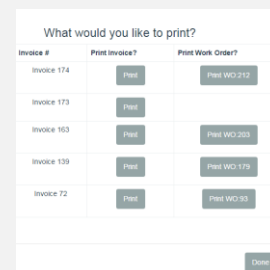
54. **Invoice Printer Preview** will display. Touch/Click **Print** button.



Printer Preview (Can vary depending on device type)

55. The Print Preview window closes and returns back to the Print Invoice Pop Up window. **Close X window.**

56. What would you like to print? Touch/Click Print WO145 button located under the Print Workorder? heading.



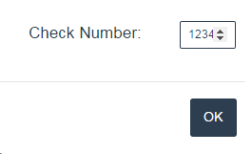
Workorder Preview



## Processing Checks & Credit Cards

### 62. Check

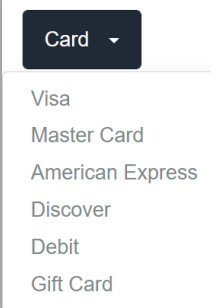
- Type payment amount into Pending Payment Field(s).
- Touch/Click the **Check** button
- Touch/Click the **Check Number** field in the pop up window. Enter check number. Touch/Click **OK**.
- Touch/Click Apply Payment



Check Number Window

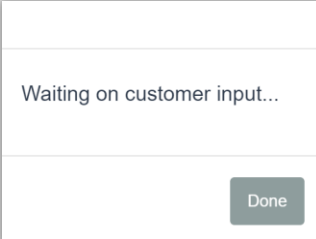
### 63. Credit/Debit/Mobile Payment with EVO Integration (Visa, MC, American Express, Discover and Debit)

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



Select Credit/Debit

- LSS Cloud Pop Up Window: **Waiting on Customer Input....**



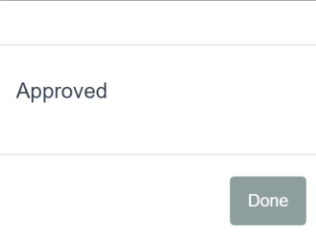
Customer Input

- Customer will **Insert Credit Card Chip** into the EVO terminal or **Tap Credit Card**.
- Customer **Removes Credit Card** when prompted by EVO terminal.
- Customer completes **Signature** on the EVO Terminal screen.
- Customer Touches **OK** on the EVO Terminal.



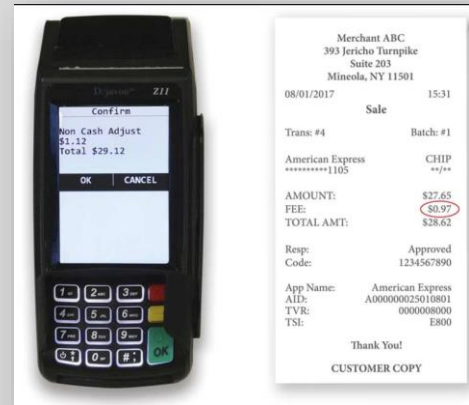
Z11 Credit Card Reader

- LSS Cloud Pop Up Message: Approved – Touch/Click the **Done** button.



Approved Response

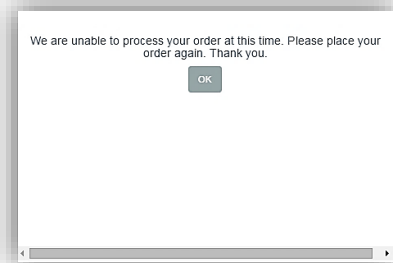
- Credit Card Receipt will **Print** from the EVO Terminal. The first copy is the **Merchant Copy** and contains the customer's signature. The second copy is the **Customer Copy**.



**Merchant/Customer Receipt**

**64. Authorization – Declined**

- We are unable to process your order at this time. Please place your order again. Thank you.
- Touch/Click **OK** button
- Touch/Click **Remove** on Payment Type line item.
- Ask customer for another form of payment.



**Decline Response**