



# LifeSaver Software Cloud

## Enterprise Management & Reports

### User Guide

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## Security

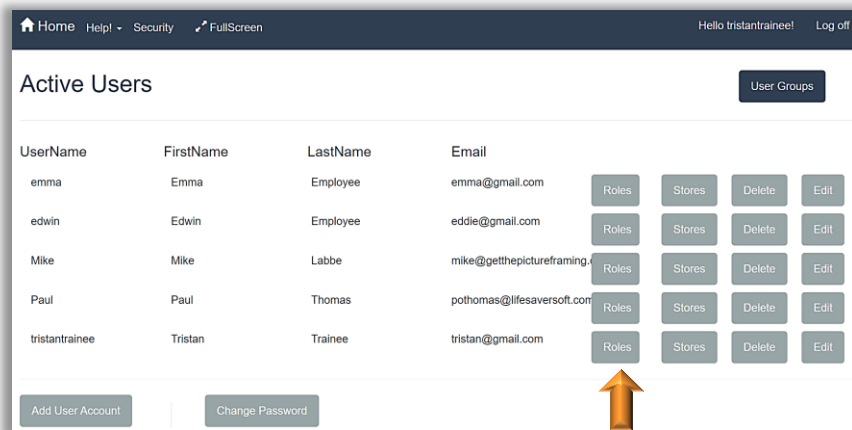
Set up your Security Role Assignments, User Group and Stores to be able to access the Enterprise Reports and Data Base Maintenance.

### Role Assignments

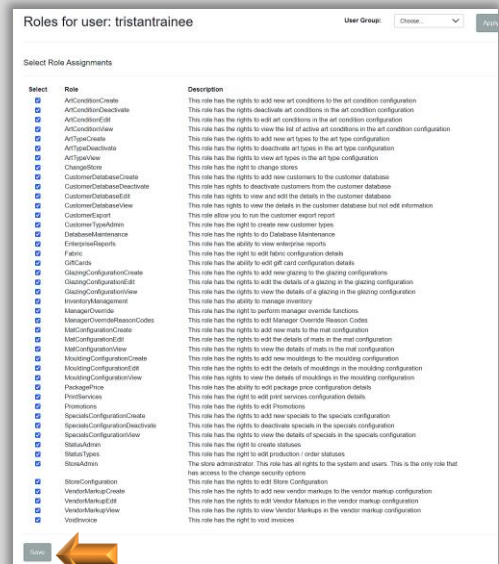
1. Select **Security** located in the blue ribbon top left screen.



2. Select **Roles** on the line item that contains your name.



3. Select all the **Role Assignments**. Select **Save**. You will return to the **Security** home screen.



## User Group

**Path:** Select **Security** – Select **Roles** on the line item that contains your name.

1. Select **Corp. Admin** in the **User Group** drop-down list. Select **Apply**.
2. Return to **Home** screen.

Home Help Security FullScreen Hello tristantrainee! Log off

Roles for user: tristantrainee

User Group: Choose... Apply

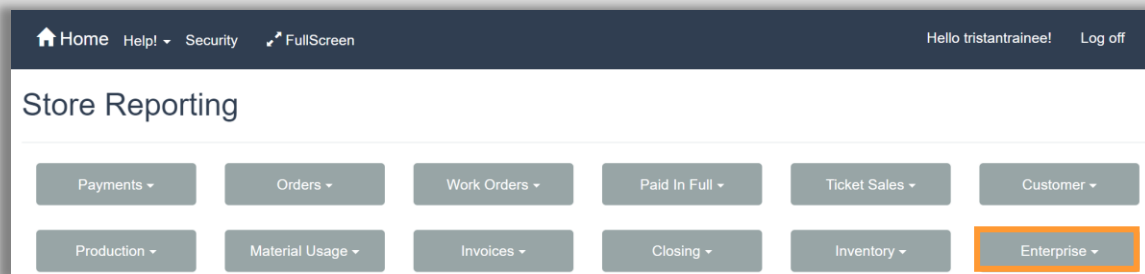
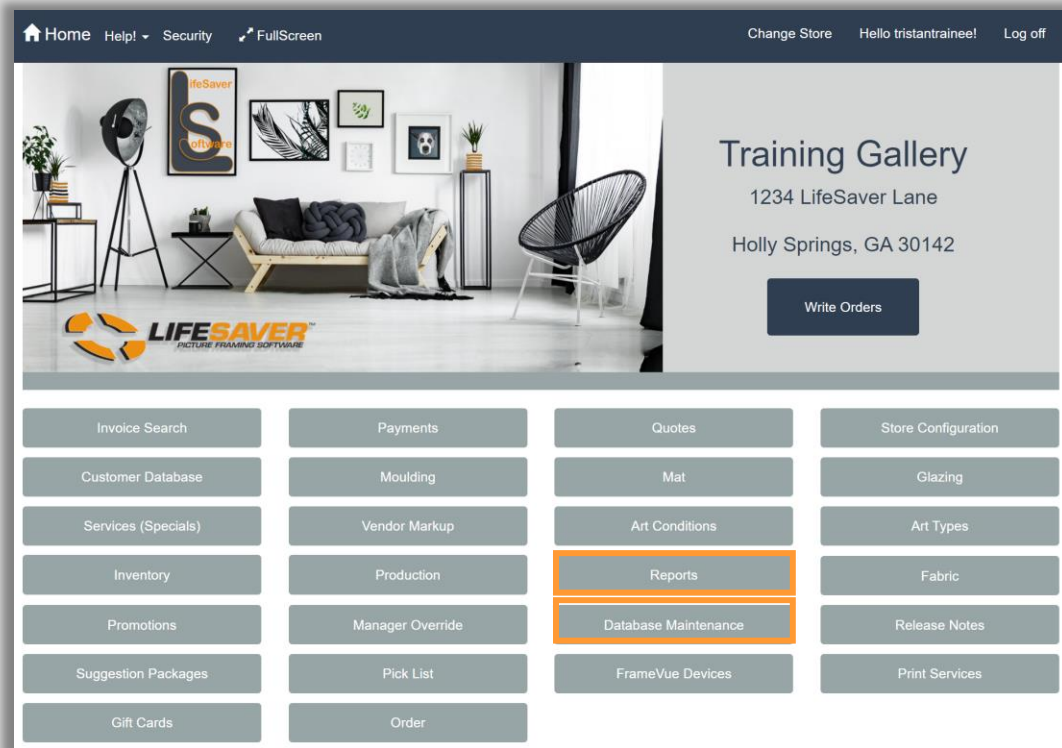
Select Role Assignments

Select	Role	Description
<input checked="" type="checkbox"/>	ArtConditionCreate	This role has the rights to add new art conditions to the art condition configuration
<input checked="" type="checkbox"/>	ArtConditionDeactivate	This role has the rights deactivate art conditions in the art condition configuration
<input checked="" type="checkbox"/>	ArtConditionEdit	This role has the rights to edit art conditions in the art condition configuration
<input checked="" type="checkbox"/>	ArtConditionView	This role has the rights to view the list of active art conditions in the art condition configuration
<input checked="" type="checkbox"/>	ArtTypeCreate	This role has the rights to add new art types to the art type configuration
<input checked="" type="checkbox"/>	ArtTypeDeactivate	This role has the rights to deactivate art types in the art type configuration
<input checked="" type="checkbox"/>	ArtTypeView	This role has the rights to view art types in the art type configuration
<input checked="" type="checkbox"/>	ChangeStore	This role has the right to change stores
<input checked="" type="checkbox"/>	CustomerDatabaseCreate	This role has the rights to add new customers to the customer database
<input checked="" type="checkbox"/>	CustomerDatabaseDeactivate	This role has rights to deactivate customers from the customer database
<input checked="" type="checkbox"/>	CustomerDatabaseEdit	This role has rights to view and edit the details in the customer database
<input checked="" type="checkbox"/>	CustomerDatabaseView	This role has rights to view the details in the customer database but not edit information
<input checked="" type="checkbox"/>	CustomerExport	This role allow you to run the customer export report
<input checked="" type="checkbox"/>	CustomerTypeAdmin	This role has the right to create new customer types
<input checked="" type="checkbox"/>	DatabaseMaintenance	This role has the rights to do Database Maintenance
<input checked="" type="checkbox"/>	EnterpriseReports	This role has the ability to view enterprise reports
<input checked="" type="checkbox"/>	Fabric	This role has the right to edit fabric configuration details
<input checked="" type="checkbox"/>	GiftCards	This role has the ability to edit gift card configuration details
<input checked="" type="checkbox"/>	GlazingConfigurationCreate	This role has the rights to add new glazing to the glazing configurations
<input checked="" type="checkbox"/>	GlazingConfigurationEdit	This role has the rights to edit the details of a glazing in the glazing configuration
<input checked="" type="checkbox"/>	GlazingConfigurationView	This role has the rights to view the details of a glazing in the glazing configuration
<input checked="" type="checkbox"/>	InventoryManagement	This role has the ability to manage inventory
<input checked="" type="checkbox"/>	ManagerOverride	This role has the right to perform manager override functions
<input checked="" type="checkbox"/>	ManagerOverrideReasonCodes	This role has the rights to edit Manager Override Reason Codes
<input checked="" type="checkbox"/>	MatConfigurationCreate	This role has the rights to add new mats to the mat configuration
<input checked="" type="checkbox"/>	MatConfigurationEdit	This role has the rights to edit the details of mats in the mat configuration
<input checked="" type="checkbox"/>	MatConfigurationView	This role has the rights to view the details of mats in the mat configuration
<input checked="" type="checkbox"/>	MouldingConfigurationCreate	This role has the rights to add new mouldings to the moulding configuration
<input checked="" type="checkbox"/>	MouldingConfigurationEdit	This role has the rights to edit the details of mouldings in the moulding configuration
<input checked="" type="checkbox"/>	MouldingConfigurationView	This role has rights to view the details of mouldings in the moulding configuration
<input checked="" type="checkbox"/>	PackagePrice	This role has the ability to edit package price configuration details
<input checked="" type="checkbox"/>	PrintServices	This role has the right to edit print services configuration details
<input checked="" type="checkbox"/>	Promotions	This role has the rights to edit Promotions
<input checked="" type="checkbox"/>	SpecialsConfigurationCreate	This role has the rights to add new specials to the specials configuration
<input checked="" type="checkbox"/>	SpecialsConfigurationDeactivate	This role has the rights to deactivate specials in the specials configuration
<input checked="" type="checkbox"/>	SpecialsConfigurationView	This role has the rights to view the details of specials in the specials configuration
<input checked="" type="checkbox"/>	StatusAdmin	This role has the right to create statuses
<input checked="" type="checkbox"/>	StatusTypes	This role has the right to edit production / order statuses
<input checked="" 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
<input checked="" type="checkbox"/>	StoreConfiguration	This role has the rights to edit Store Configuration
<input checked="" type="checkbox"/>	VendorMarkupCreate	This role has the rights to add new vendor markups to the vendor markup configuration
<input checked="" type="checkbox"/>	VendorMarkupEdit	This role has the rights to edit Vendor Markups in the vendor markup configuration
<input checked="" type="checkbox"/>	VendorMarkupView	This role has the rights to view Vendor Markups in the vendor markup configuration
<input checked="" type="checkbox"/>	VoidInvoice	This role has the right to void invoices

Save

3. **Log Out** and **Login** to LSS Cloud to reset your Security Role.

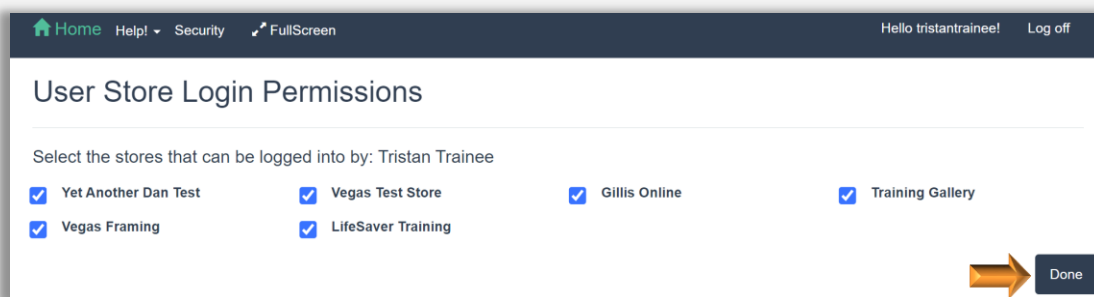
- The Home screen menu should now contain a **Database Maintenance** menu button and an **Enterprise** button should now display under the **Reports** button.



## Stores

**Path:** Select **Security** – Select **Stores** on the line item that contains your name.

- Select all **Stores**. Select **Done**.

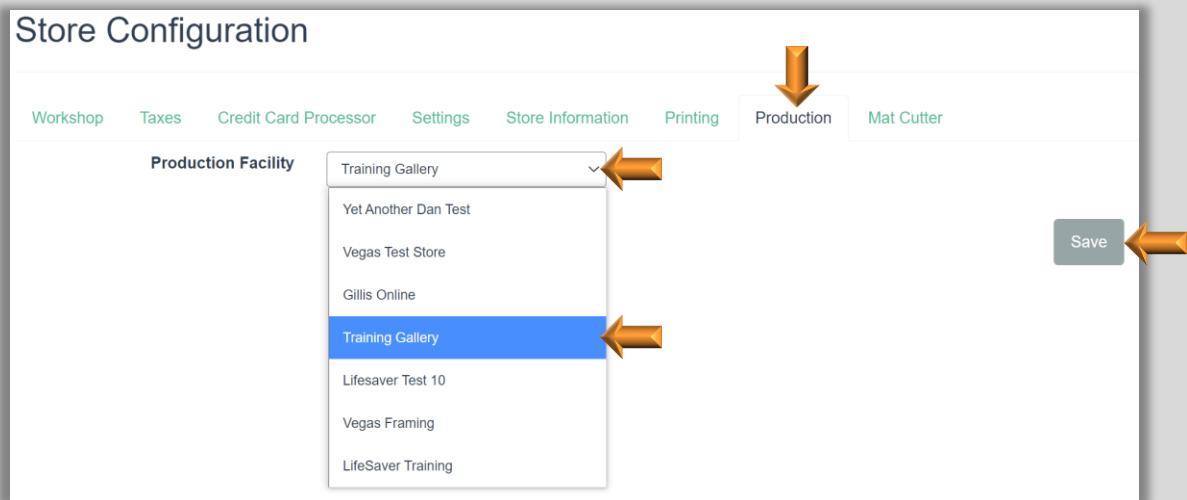


## Production Facility

Select a main production facility if applicable.

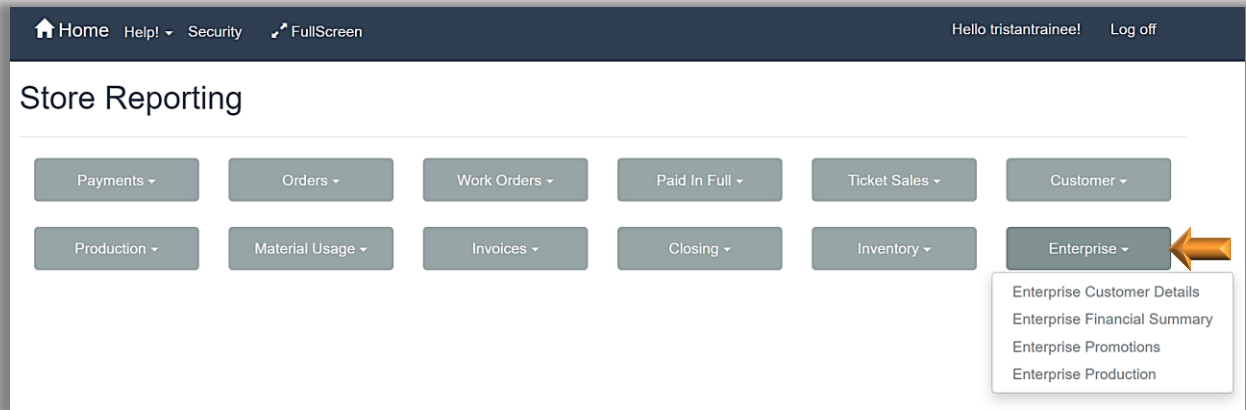
**Path:** Select Store Configuration – Selection Production Tab.

1. Touch/Click **Drop Down Arrow**.
2. Touch/Click **Production Facility** name. **Image Example:** Training Gallery.
3. Touch/Click **Save**.

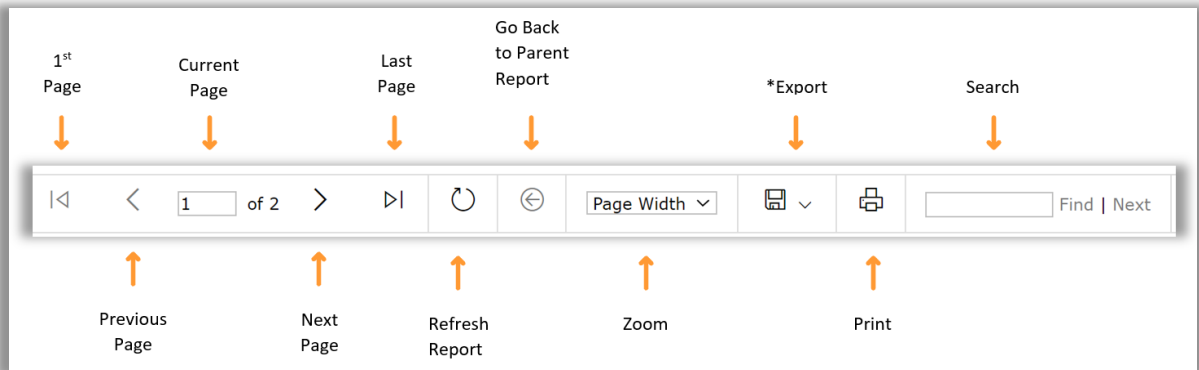


## Enterprise Reports

**Note:** Our report example images are based on a group of our test stores, so the data retrieved can sometimes look irregular.



## Report Navigation



*\*Export Report to Word, Excel, PowerPoint, PDF, Tiff File, MHTML, CSV or XML File with Report Data.*

## Customer Details Report

1. Select **Reports** on the Home screen.
2. Select **Enterprise**.
3. Select **Enterprise Customer Details**.
4. The report will contain all customer profiles in your selected stores. Categories are as follow: Store Name, Customer Name, Address, City, State, Zip, Phone and Email.
5. The following categories can be filtered: Store Name, Consumer Name, City, State and Zip. Touch/Click the up/down arrows to the right of the category heading to filter. This is a great tool to target promotions in specific geographical areas.





6. **Store Filter.** Touch/Click the Store(s) drop-down arrow. Touch/Click **Select All** to clear selections. Select **Stores** you would like to include in the report.

Store(s) 5555,LSSOnline store: 271,Vegas 2

(Select All)

5555

LSSOnline store: 271

Vegas 2018 Retail

7. Select the **View Report** button to process the new date and store selections.



8. The top chart data reflects the sum total of all stores selected in the Stores drop down list for the period selected. It displays **Total Frames, Total Workorders, Total Invoices** and **Total Sales for This Period, Last Year** and **Percentage of Change**.

	This Period	Last Year	% Change
Total Frames	22	0	Infinity
Total WorkOrders	22	0	Infinity
Total Invoices	24	14	71.43 %
Total Sales	\$10,564.22	\$359.99	2,834.55 %

9. The bottom chart data reflects each individual store's **Total Sales, Number of Invoices, Number of Frames Sold** and **Number of Jobs** for **Week to Date, Month to Date** and **Year to Date**.

Store #	Location	Week To Date: Aug 16, 2020 - Aug 22, 2020				Month To Date: Aug 01, 2020 - Aug 22, 2020				Year To Date: Jan 01, 2020 - Aug 22, 2020			
		Total Sales	# Invoices	# Frames	# Jobs	Total Sales	# Invoices	# Frames	# Jobs	Total Sales	# Invoices	# Frames	# Jobs
2018	Las Vegas, NV									\$25,584.48	59	0	0
5555	Las Vegas, NV									\$2,968.19	7	0	0
LSSOnline store: 271	Holly Springs, GA	\$10,564.22	24	22	22	\$11,404.82	28	22	22	\$29,988.60	60	57	57

10. The Financial Report can be **Printed** or **Exported**.

11. Select **Back** button to return to the main Store Reports home screen.

**Financial Summary**

	This Period	Last Year	% Change
Total Frames	22	0	Infinity
Total WorkOrders	22	0	Infinity
Total Invoices	24	14	71.43 %
Total Sales	\$10,564.22	\$359.99	2,834.55 %

Store #	Location	Week To Date: Aug 16, 2020 - Aug 22, 2020				Month To Date: Aug 01, 2020 - Aug 22, 2020				Year To Date: Jan 01, 2020 - Aug 22, 2020			
		Total Sales	# Invoices	# Frames	# Jobs	Total Sales	# Invoices	# Frames	# Jobs	Total Sales	# Invoices	# Frames	# Jobs
5555	Las Vegas, NV									\$25,584.48	59	0	0
	Las Vegas, NV									\$2,968.19	7	0	0
LSSOnline store: 271	Holly Springs, GA	\$10,564.22	24	22	22	\$11,404.82	28	22	22	\$29,988.60	60	57	57

Enterprise\_Desktop\_FinancialSummary Run at: 8/26/2020 3:52:31 PM  
Date Range 8/16/2020 12:00:01 AM To 8/22/2020 11:59:59 PM

### Promotions Report

1. Select **Reports** on the Home screen.
2. Select **Enterprise**.
3. Select **Enterprise Promotions**.
4. The report processes and defaults to the following filters: **Previous Full Week to Date, All Stores and All Promotions**.

### Edit Report Filters

5. **Promotions Filter**. Touch/Click the **Promotion drop-down arrow**. Touch/Click the **Select All** to clear selections. Select **Promotions** you would like to include in the report.

6. **Store Filter.** Touch/Click the Store(s) drop-down arrow. Touch/Click **Select All** to clear selections. Select **Stores** you would like to include in the report.

Store(s) 5555,LSSOnline store: 271,Vegas 2

(Select All)

5555

LSSOnline store: 271

Vegas 2018 Retail

7. **Start and End Date Filter.** Touch/Click the **Calendar** icon to the right of the Start or End Date. Select **New Date**.

Start Date 8/9/2020 12:00:01 AM

August 2020

.S.	.M.	.T.	.W.	.T.	.F.	.S.
26	27	28	29	30	31	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	1	2	3	4	5

Today is Wednesday, August 26, 2020

8. Select the **View Report** button to process the new filters.

View Report

9. For each store, the report will list the **Promotion Names** which includes **Store Overall Totals, None** and **Promotions** that was created for your company and selected for this report. *Demo Example: Store 271 – Customer Birthday Month and Summer Sale.* The **Pre-Discount Retail Amount, Total Discount Amount, Total Net Frame Count** and **Workorder Count** will display for each promotion.

**Note:** The Promotion None refers to no promotion was used but it can include miscellaneous and manager override discounts.

### Promotion

Store	Promotion	Pre-Discount Retail	Total Discount	Total Net	Frame Count	Work Order Count
1234	Store Overall Totals	\$27,945.26	\$559.06	\$27,386.20	62	62
	None	\$21,183.26	\$32.86	\$21,150.40	53	53
	Winter Coupon	\$6,762.00	\$526.20	\$6,235.80	9	9
5555	Store Overall Totals	\$348.32	\$0.00	\$348.32	1	1
	None	\$348.32	\$0.00	\$348.32	1	1
LSSOnline store: 271	Store Overall Totals	\$92,002.90	\$2,570.34	\$89,432.56	188	188
	Customer Birthday Month	\$9,482.03	\$1,180.44	\$8,301.59	14	14
	None	\$74,331.53	\$691.00	\$73,640.53	161	161
	Summer Sale	\$8,189.34	\$698.90	\$7,490.44	13	13

Enterprise\_Desktop\_Promotions Run at: 8/28/2020 11:49:22 AM

Date Range 1/1/2018 12:00:01 AM To 8/28/2020 11:59:59 PM

10. The Financial Report can be **Printed** or **Exported**.

11. Select **Back** button to return to the main Store Reports home screen.

Enterprise\_Desktop\_Promotions Run at: 8/28/2020 11:49:22 AM  
Date Range 1/1/2018 12:00:01 AM To 8/28/2020 11:59:59 PM

### Enterprise Production Report

1. Select **Reports** on the Home screen.
2. Select **Enterprise**.
3. Select **Enterprise Production**.
4. The production report processes and defaults to the following filters:
  - a. All Stores Selected.
  - b. Date Range: Year to Date.
  - c. Group by: Original Location.
  - d. Status Group: All Selected.
  - e. Status: All Selected.
  - f. Priority: Show All.

View Report

## Edit Report Filters

5. Store Filter. Touch/Click the Store(s) drop-down arrow. Touch/Click **Select All** to clear selections. Select **Stores** you would like to include in the report.

Store(s) 5555,LSSOnline store: 271,Vegas 2

- (Select All)
- 5555
- LSSOnline store: 271
- Vegas 2018 Retail

6. Start and End Date Filter. Touch/Click the **Calendar** icon to the right of the Start or End Date. Select **New Date**.

Start Date 8/9/2020 12:00:01 AM

August 2020

.S.	.M.	.T.	.W.	.T.	.F.	.S.
26	27	28	29	30	31	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	1	2	3	4	5

Today is Wednesday, August 26, 2020

7. Group By Filter. For off-site production. Select to view the workorders by **Original or Current Location**.

Group By Origin Location

- Origin Location
- Current Location

8. Production Status Filter. The list will contain the production statuses you created for your group of stores. Select the **Status(es)** you would like to view in the report.

Status Assembled,Deleted,Delivered,FullRe

- Assembled
- Deleted
- Delivered
- FullRefund
- InProgress
- Materials Cut

9. Production Status Group Filter. The list will contain the following production groups: **To Do, Assembled, Delivered, Other** and **Inactive**. Select the **Status(es)** you would like to view in the report.

**Example:** The following production statuses will fall into the To-Do Status Group: *Frame Cut, Mat Cut, In Progress, On Order, Production, Ready for Work, Sold, Verified & Workorders to Do.*

Status Group To-Do,Assembled,Delivered,Other,I

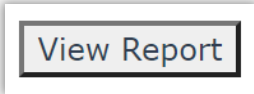
- (Select All)
- To-Do
- Assembled
- Delivered
- Other
- Inactive

10. Priority Filter. The list will contain **Show All, Overdue** and **Undelivered**. Select the **Status** you would like to view in the report.

Priority Show All

- Show All
- Overdue
- Undelivered

11. View Report. Touch/Click **View Report** after all production filters have been selected.



12. For each store selected the report will display the following per workorder line item: **Store of Origin, Current Location, Invoice Number, Workorder Number, Workorder Description, Production Status, Order Date, Last Status Update** and **Due Date**. Touch/Click the **Next Page Arrow** to scroll through all stores selected report data.

**Note:** The due date in red font reflects that the workorder is overdue. The orange font reflects that the due date is less than one week out.

**Tip:** The workorders can be viewed in the Production or Order menu.

Enterprise Production Report								
Orders From: 8/18/2020								
Status On: 8/31/2020								
Store	Current Location	Invoice	Work Order	Description	Status	Order Date	Last Status Update	Due Date
LSSOnline store: 271	LSSOnline store: 271	560	513	RO 9	Mat Cut	8/18/2020	8/28/2020	9/1/2020
	LSSOnline store: 271	561	514	Flowers	InProgress	8/18/2020	8/28/2020	9/1/2020
	LSSOnline store: 271	561	514	Flowers	Work Orders To Do	8/18/2020	8/18/2020	9/1/2020
	LSSOnline store: 271	562	515	EPL	Assembled	8/18/2020	8/28/2020	9/1/2020
	LSSOnline store: 271	562	515	EPL	Work Orders To Do	8/18/2020	8/18/2020	9/1/2020
	LSSOnline store: 271	563	516	Flowers 2	Assembled	8/18/2020	8/28/2020	9/1/2020
	LSSOnline store: 271	563	516	Flowers 2	Work Orders To Do	8/18/2020	8/18/2020	9/1/2020
	LSSOnline store: 271	565	517	Flowers III	Assembled	8/18/2020	8/28/2020	9/1/2020
	LSSOnline store: 271	565	518	Flowers IV	Assembled	8/18/2020	8/28/2020	9/1/2020
	LSSOnline store: 271	566	519	Fishing Day I	Assembled	8/18/2020	8/28/2020	9/1/2020
	LSSOnline store: 271	566	520	Fishing Day II	Frame Cut	8/18/2020	8/28/2020	9/1/2020
	LSSOnline store: 271	568	521	Italian Villa	Frame Cut	8/18/2020	8/28/2020	9/1/2020
	LSSOnline store: 271	569	522	Italian Villa	InProgress	8/18/2020	8/28/2020	9/1/2020
	LSSOnline store: 271	571	523	Flower in Vase	Frame Cut	8/26/2020	8/28/2020	9/9/2020
	LSSOnline store: 271	572	524	River in Fall	Mat Cut	8/26/2020	8/28/2020	9/9/2020
	LSSOnline store: 271	573	525	Boy Fishing	InProgress	8/26/2020	8/28/2020	9/9/2020
	LSSOnline store: 271	574	526	Lake View	InProgress	8/26/2020	8/28/2020	9/9/2020
LSSOnline store: 271	575	527	Italy	InProgress	8/26/2020	8/28/2020	9/9/2020	

13. The Production Report can be **Exported** or **Printed**.

14. Select **Back** button to return to the main Store Reports home screen.

**Enterprise Production Report**  
 Orders From: 8/18/2020  
 Status On: 8/31/2020

Store	Current Location	Invoice	Work Order	Description	Status	Order Date	Last Status Update	Due Date
LSSOnline store: 271	LSSOnline store: 271	560	513	RO 9	Mat Cut	8/18/2020	8/28/2020	9/1/2020
	LSSOnline store: 271	561	514	Flowers	InProgress	8/18/2020	8/28/2020	9/1/2020
	LSSOnline store: 271	561	514	Flowers	Work Orders To Do	8/18/2020	8/18/2020	9/1/2020
	LSSOnline store: 271	562	515	EPL	Assembled	8/18/2020	8/28/2020	9/1/2020
	LSSOnline store: 271	562	515	EPL	Work Orders To Do	8/18/2020	8/18/2020	9/1/2020
	LSSOnline store: 271	563	516	Flowers 2	Assembled	8/18/2020	8/28/2020	9/1/2020
	LSSOnline store: 271	563	516	Flowers 2	Work Orders To Do	8/18/2020	8/18/2020	9/1/2020
	LSSOnline store: 271	565	517	Flowers III	Assembled	8/18/2020	8/28/2020	9/1/2020
	LSSOnline store: 271	565	518	Flowers IV	Assembled	8/18/2020	8/28/2020	9/1/2020
	LSSOnline store: 271	566	519	Fishing Day I	Assembled	8/18/2020	8/28/2020	9/1/2020
	LSSOnline store: 271	566	520	Fishing Day II	Frame Cut	8/18/2020	8/28/2020	9/1/2020
	LSSOnline store: 271	568	521	Italian Villa	Frame Cut	8/18/2020	8/28/2020	9/1/2020
	LSSOnline store: 271	569	522	Italian Villa	InProgress	8/18/2020	8/28/2020	9/1/2020
	LSSOnline store: 271	571	523	Flower in Vase	Frame Cut	8/26/2020	8/28/2020	9/9/2020
	LSSOnline store: 271	572	524	River in Fall	Mat Cut	8/26/2020	8/28/2020	9/9/2020
	LSSOnline store: 271	573	525	Boy Fishing	InProgress	8/26/2020	8/28/2020	9/9/2020
	LSSOnline store: 271	574	526	Lake View	InProgress	8/26/2020	8/28/2020	9/9/2020
	LSSOnline store: 271	575	527	Italy	InProgress	8/26/2020	8/28/2020	9/9/2020

## Delivered Order Summary

1. Select **Reports**.
2. Select **Enterprise**.
3. Select **Delivered Order Summary**.
4. The report processes and defaults to the Select All Stores filter and the Past 5 Days.

Stores: 16593 Cant,GA,Vegas Test Store,Johns  
Start Date: 6/13/2021  
End Date: 6/17/2021  
View Report

### Edit Filters

5. Store Filter. Touch/Click the Store(s) drop-down arrow. Touch/Click **Select All** to clear selections. Select **Stores** you would like to include in the report.

16593 Cant,GA,Vegas Test Store,Johns  
 (Select All)  
 16593 Cant,GA  
 Vegas Test Store  
 Johns  
 LSSOnline store: 271  
 LSSOnline store: 1569

6. Start and End Date Filter. Touch/Click the **Calendar** icon to the right of the Start or End Date. Select **New Date**.

Start Date: 8/9/2020 12:00:01 AM  
August 2020  
Today is Wednesday, August 26, 2020

7. View Report. Touch/Click **View Report** after all filters have been selected.

View Report

8. The report will show the delivered orders for the time period selected and set stores. The report categories are as follows: **Store, Delivery Date, Labor, Material, Subtotal, Tax** and **Total**.



Back

Stores: 16593 Cant,GA,Vegas Test Store,JoH

Start Date: 5/22/2021 End Date: 6/17/2021

View Report

Page Width

Find | Next

Run on: 6/17/2021 4:27:21 PM

### Enterprise Delivered Order Summary Report

for 5/22/2021 to 6/17/2021

Store	Delivery Date	Labor	Material	Subtotal	Tax	Total	
16593 Cant,GA	5/26/2021	\$0.00	\$30.00	\$30.00	\$2.33	\$32.33	
	5/27/2021	\$0.00	\$10.00	\$10.00	\$0.78	\$10.78	
	<b>Store Total</b>	\$0.00	\$40.00	\$40.00	\$3.10	\$43.10	
Johns	5/24/2021	\$0.00	\$222.00	\$222.00	\$17.21	\$239.21	
	5/27/2021	\$0.00	\$700.00	\$700.00	\$54.25	\$754.25	
	6/2/2021	\$0.00	\$33.00	\$33.00	\$2.56	\$35.56	
	6/15/2021	\$14.88	\$677.02	\$691.90	\$0.00	\$691.90	
	<b>Store Total</b>	\$14.88	\$1632.02	\$1646.90	\$74.01	\$1720.91	
LSSOnline store: 1569	5/22/2021	\$0.00	\$10.00	\$10.00	\$0.70	\$10.70	
	6/17/2021	\$0.00	\$10.00	\$10.00	\$0.70	\$10.70	
	<b>Store Total</b>	\$0.00	\$20.00	\$20.00	\$1.40	\$21.40	
Vegas Test Store	5/27/2021	\$0.00	\$465.00	\$465.00	\$34.88	\$499.88	
	6/8/2021	\$383.22	\$855.02	\$1238.24	\$92.87	\$1331.11	
	6/15/2021	\$0.00	\$883.50	\$883.50	\$66.26	\$949.76	
	<b>Store Total</b>	\$383.22	\$2203.52	\$2586.74	\$194.01	\$2780.75	
<b>Chain Total</b>		\$398.10	\$3895.54	\$4293.64	\$272.52	\$4566.16	
<b>OVERALL TOTAL:</b>			<b>\$398.10</b>	<b>\$3895.54</b>	<b>\$4293.64</b>	<b>\$272.52</b>	<b>\$4566.16</b>

9. The Delivered Order Summary Report can be **Exported** or **Printed**.

10. Select **Back** button to return to the main Store Reports home screen.

## Undelivered Order Summary

1. Select **Reports**.
2. Select **Enterprise**.
3. Select **Undelivered Order Summary**.
4. The report processes and defaults to
  - a. All Stores
  - b. LSS Cloud Program Active Date
  - c. True – Framing Orders Only
  - d. False – Assembled Orders Only

Stores: 16593 Cant,GA,5555,Johns,LSSOnl

Start Date: 1/15/2015

End Date: 9/13/2021

Framing Orders Only  True  False

Assembled Orders Only  True  False

View Report

## Edit Filters

5. Store Filter. Touch/Click the Store(s) drop-down arrow. Touch/Click **Select All** to clear selections. Select **Stores** you would like to include in the report.

16593 Cant,GA,Vegas Test Store,Johns

- (Select All)
- 16593 Cant,GA
- Vegas Test Store
- Johns
- LSSOnline store: 271
- LSSOnline store: 1569

6. Start and End Date Filter. Touch/Click the **Calendar** icon to the right of the Start or End Date. Select **New Date**.

Start Date: 8/9/2020 12:00:01 AM

August 2020

.S.	.M.	.T.	.W.	.T.	.F.	.S.
26	27	28	29	30	31	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	1	2	3	4
5						

Today is Wednesday, August 26, 2020

7. Order Filter. Select **True** to view Framing Orders only. Select **False** to also view inventory items.

Framing Orders Only  True  False

8. Status Filter. Select **True** to view Assembled Orders Only. Select **False** to view all production statuses.

Assembled Orders Only  True  False

9. View Report. Touch/Click **View Report** after all filters have been selected.



10. The report will display the undelivered orders with the selected filters. Scroll through the page and pages to view all stores. The report categories are as follows: **Store, Date Ordered, Invoice #, W/O# Qty, Location, Status, Salesperson, Customer Name, Phone, Subtotal, Tax, Total and Paid in Full**.

Back

Stores: 16593 Cant,GA,5555,Johns,LSSOnl

Start Date: 1/15/2015  End Date: 9/13/2021

Framing Orders Only  True  False Assembled Orders Only  True  False

Navigation: |< < 25 of 27 ? > >|       Find | Next

Store	Date Ordered	Invoice #	W/O #	Qty	Location	Status	Sales Person	Customer Name	Phone	Subtotal	Tax	Total	Paid In Full
LSSOnline store: 271	8/26/2020	574	526	1		InProgress	tristantraine	Don Camera	(963) 852-7412	\$488.27	\$34.18	\$522.45	N
	8/26/2020	575	527	1		InProgress	tristantraine	Wally Wall	(125) 478-9546	\$396.89	\$27.78	\$424.67	N
	9/29/2020	576	528	1		Work Orders To Do	tristantraine	Gladys and Company - Gladys Glazing	(770) 895-4422	\$869.85	\$60.89	\$930.74	N
	10/13/2020	577	529	1		InProgress	tristantraine	Gladys and Company - Gladys Glazing	(770) 895-4422	\$869.85	\$60.89	\$930.74	N
	12/30/2020	580	531	1		Work Orders To Do	tristantraine	Fred Fillet	(817) 789-4568	\$532.81	\$37.30	\$570.11	N
	1/7/2021	581	532	1		Work Orders To Do	tristantraine	Joe Customer	(678) 415-9534	\$473.08	\$33.82	\$506.90	N
	1/7/2021	583	534	1		Work Orders To Do	tristantraine	Charlie Brown	(817) 255-3112	\$542.81	\$38.00	\$580.81	N
	1/7/2021	586	536	1		Work Orders To Do	tristantraine	Jane Doe	(456) 789-1542	\$624.20	\$0.00	\$624.20	N
	3/18/2021	588	537	1		Work Orders To Do	tristantraine	Fred Fillet	(817) 789-4568	\$470.67	\$32.95	\$503.62	N
	4/20/2021	590	538	1		Work Orders To Do	tiffanytraine	Fred Framer	(817) 125-7894	\$612.47	\$0.00	\$612.47	N
	4/20/2021	591	539	1		Work Orders To Do	tiffanytraine	Betty Bevel	(404) 785-4512	\$398.91	\$0.00	\$398.91	N
	5/10/2021	593	540	1		Work Orders To Do	tiffanytraine	Fred Framer	(817) 125-7894	\$612.47	\$42.87	\$655.34	N
	5/12/2021	595	541	1		Work Orders To Do	tiffanytraine	Betty Bevel	(404) 785-4512	\$715.69	\$50.10	\$765.79	N
	5/17/2021	596	542	1		Work Orders To Do	tiffanytraine	Frannie Frame	(817) 593-5899	\$596.86	\$41.78	\$638.64	N
5/17/2021	597	543	1		Work Orders To Do	tiffanytraine	Frannie Frame	(817) 593-5899	\$398.91	\$27.92	\$426.83	N	
5/28/2021	598	544	1		Work Orders To Do	tiffanytraine	Fanny Frame	(456) 789-1234	\$367.23	\$25.71	\$392.94	N	

11. The Undelivered Order Summary Report can be **Exported** or **Printed**.

12. Select **Back** button to return to the main Store Reports home screen.

## Delivered Order Detail

1. Select **Reports**.
2. Select **Enterprise**.
3. Select **Delivered Order Detail**.
4. The report processes and defaults to
  - a. All stores
  - b. Current weeks dates.

Stores    
Start Date   End Date

## Edit Filters

5. Store Filter. Touch/Click the Store(s) drop-down arrow. Touch/Click **Select All** to clear selections. Select **Stores** you would like to include in the report.

16593 Cant,GA,Vegas Test Store,Johns

- (Select All)
- 16593 Cant,GA
- Vegas Test Store
- Johns
- LSSOnline store: 271
- LSSOnline store: 1569

6. Start and End Date Filter. Touch/Click the **Calendar** icon to the right of the Start or End Date. Select **New Date**.

Start Date

August 2020

.S.	.M.	.T.	.W.	.T.	.F.	.S.
26	27	28	29	30	31	1
2	3	4	5	6	7	8
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Today is Wednesday, August 26, 2020

7. View Report. Touch/Click **View Report** after all filters have been selected.

- The report will display the Delivered Order Details with the filters selected. Scroll through the page or pages to view all stores. The report categories are as follows: **Store, Delivery Date, Invoice #, Paid, Customer, Revision, Line Item #, Workorder #/Item #, Sales Person, Quantity, Labor, Material, Subtotal, Tax and Total.**

**Enterprise Delivered Order Detail Report**  
for 9/12/2021 to 9/13/2021

Run on: 9/13/2021 5:19:19 PM

Store	Delivery Date	Invoice #	Paid	Customer	Rev #	Line Item #	WO # / Item	Sales Person	Qty	Labor	Material	Subtotal	Tax	Total
LSSOnline store: 271	9/13/2021	601	Y	Fred Fillet	2	1	WO: 547	Tiffany Trainee	1	\$56.77	\$721.10	\$777.87	\$54.45	\$832.32
		607	Y	Minnie Mouse	2	1	WO: 548	Tiffany Trainee	1	\$74.76	\$548.10	\$622.86	\$43.60	\$666.46
		614	Y	Charlie Brown	1	1	WO: 552	Tiffany Trainee	1	\$39.96	\$762.54	\$802.50	\$0.00	\$802.50
						4	WO: 555	Tiffany Trainee	1	\$32.56	\$498.19	\$530.75	\$0.00	\$530.75
						5	WO: 556	Tiffany Trainee	1	\$39.22	\$754.98	\$794.20	\$0.00	\$794.20
						6	WO: 557	Tiffany Trainee	1	\$29.60	\$314.27	\$343.87	\$0.00	\$343.87
		615	Y	Fred Fillet	1	1	Item: B1234	Tiffany Trainee	1	\$0.00	\$25.00	\$25.00	\$1.75	\$26.75
<b>Store Totals:</b>										<b>\$272.87</b>	<b>\$3,624.18</b>	<b>\$3,897.05</b>	<b>\$99.80</b>	<b>\$3,996.85</b>
<b>TOTALS:</b>										<b>\$272.87</b>	<b>\$3,624.18</b>	<b>\$3,897.05</b>	<b>\$99.80</b>	<b>\$3,996.85</b>

- The Delivered Order Detail Report can be **Exported** or **Printed**.

- Select **Back** button to return to the main Store Reports home screen.

## Database Maintenance

Update database products, services, and pricing. Import, schedule and distribute pricing profile to stores.

### Export

Export and email your selected store's database by the following types: Mat, Moulding, Specials, Glazing, Inventory, Promotions and Markup Grid Groups/Items. When the export is received, update products, services, and pricing in the spreadsheet. Maintain the same format and save as a CSV file.

1. Select **Database Maintenance** on the Home menu.
2. Type **Email Addresses** in the Completion Email List field. Separate multiple email addresses by a semicolon. Select **Save**. The export will be emailed to the addresses entered.
3. Select **Export**

Database Maintenance

Export Import Pricing Profile Distribution Scheduled Pricing Imports

Completion Email List J.Doe@gmail.com;S.Smith@gmail.com Save

\*\*\*Email addresses can be separated by a semicolon

4. Touch/Click the Database Type drop-down arrow. Select **Database Type**.  
**Demo Example: Moulding.**

Export

Choose database type to export.

Mat

Mat

Moulding

Specials

Glazing

Inventory

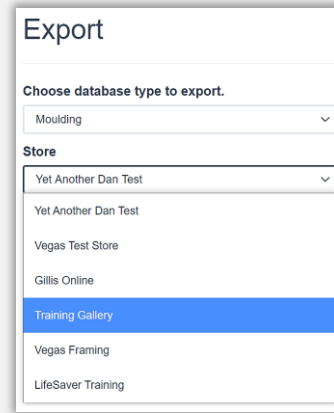
Promotions

MarkupGridGroups

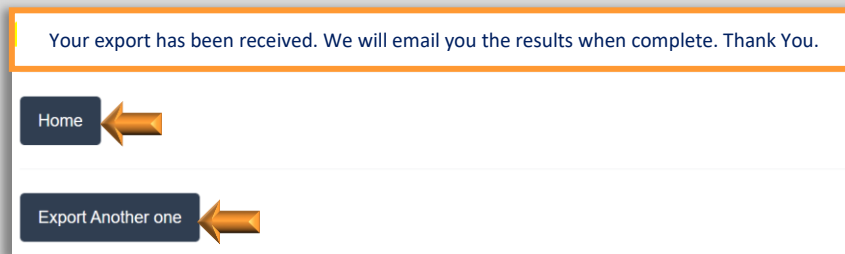
MarkupGridItems

- Touch/Click the Store drop-down arrow. Select **Store**.

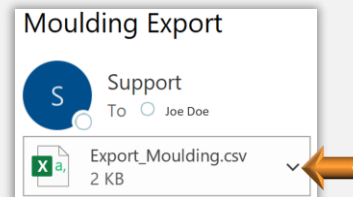
**Demo Example: Training Gallery.**



- Select the **Start** button. The following message will display. *“Your export has been received. We will email you the results when complete. Thank you.”* Select **Home** to return to the Home menu. Select **Export Another One** if you have additional databases to export.



- Open **Attachment** in the email from Support.



id	vendor	name	description	upc	length Cost	chop Cost	join Cost	other Cost	length Markup	chop Markup	wedge Count	join Markup	other Markup	is Closed Corner	is Boxer	is Filllet	is Liner	is ReadyMade	is Strainer	mouldin g Height	moulding Width	rabbet Height	rabbet Width	moulding Width Metric	stock Amount	active	bin Number
427	145 - Larson Juhl	E336124	W2 RUBENS COBALT BLUE 1 5/8"	7.2047E+11	5.62	9.19	12.87	12.9	3.6	2	0	2	3	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	0	1.625	0	0	0	0	0	FALSE
425	218 - Roma Moulding	123456	Bob's Barnwood		7	0	10	0	2	0	0	3	0	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	0	1.5	0	0	0	0	0	TRUE
428	218 - Roma Moulding	R100153	Ramino 2 1/2 Mahogany Lacquer with Gol	7.786E+11	11.89	18.52	0	0	3	2	0	3.1	3	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	0	2.5	0	0	0	0	0	TRUE
420	218 - Roma Moulding	R112087	Versailles 3 Dark Brown Etched Silver	7.786E+11	8.02	11.47	0	0	3.4	2	0	3.1	3	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	0	3	0	0	0	0	0	TRUE
12293	368 - Default Moulding	whitgn	White Pine		5	6	7	0	2	2	0	2	0	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	0	2	0	0	0	0	0	TRUE

- Update Products, Services & Pricing. Maintain the **Same Format**. **Save** as a **CSV** (comma delimited).

## Import

When the updates to the databases have been exported and saved to a CSV file, they are ready to be imported.

1. Select **Database Maintenance** on the Home menu.
2. Ensure that the email addresses are correct in order to receive confirmation of the import.
3. Select the **Import** button.

Database Maintenance

Export

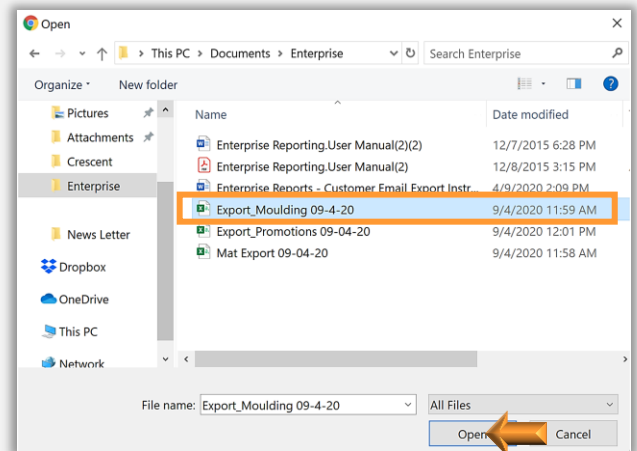
Import Pricing Profile Distribution Scheduled Pricing Imports

Completion Email List J.Doe@gmail.com;S.Smith@gmail.com Save

\*\*\*Email addresses can be separated by a semicolon

4. Select the **Database Type** that you are importing in the drop-down list. **Demo Example: Moulding**
5. Select the **Store** in the drop-down list that will be receiving the import. **Demo Example: Training Gallery.**

6. Select **Choose File. Browse, Select** and **Open** the appropriate **import**.



7. Select **Upload**.

Import

Choose database type to import.

Moulding

Store

Training Gallery

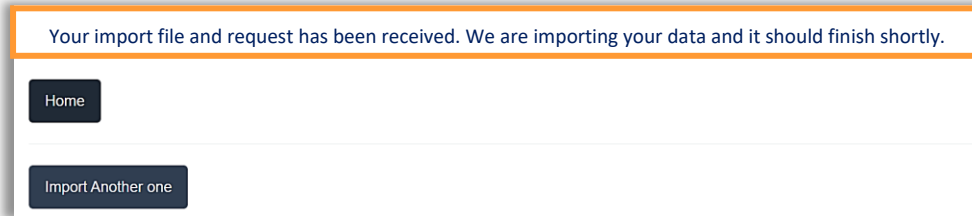
File

Choose File Export\_Moulding 09-4-20.csv

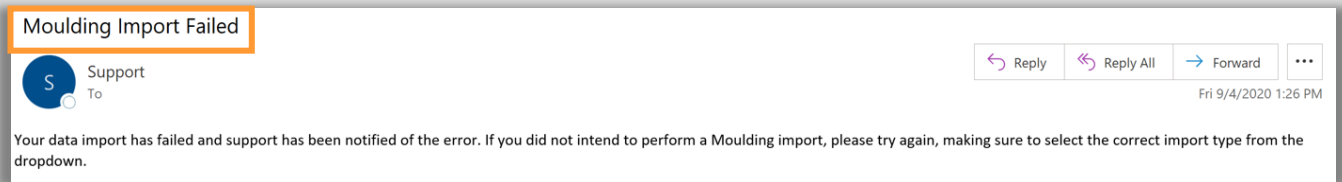
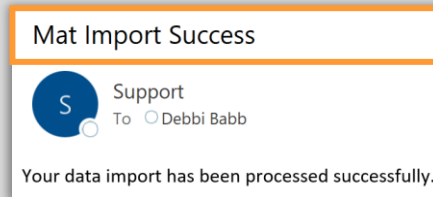
Upload



8. The following message will display. “Your import file and request has been received. We are importing your data and it should finish shortly. Thank you.” Select **Home** to return to the home menu. Select **Import Another One** to import additional database(s).



9. You will receive an email from Support stating if your import was successful or failed. If it failed, double check your spreadsheet to ensure that you used the correct format and that you did not mis-key any data. If you find the error, correct it and import the database again. If not, call support, they will have received the import and will search for the error to correct. 1-800-381-0600



## **Pricing Profile Distribution**

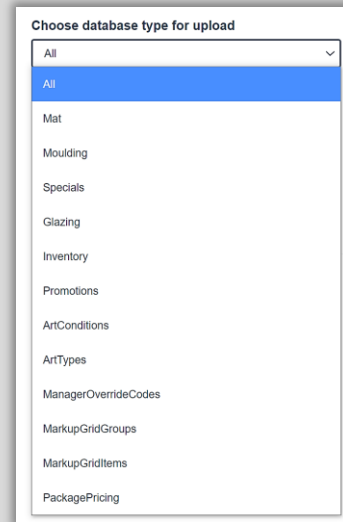
*Distribute and schedule the updated pricing and product profile to select stores. This function operates two different ways.*

- a. You can perform the price/product export and import as instructed in the previous section then distribute those changes to the stores.*
- b. You can make price/product changes to your current lab program and then distribute its database out to the stores. Note: Import/Export is not necessary for this function.*

1. Select **Database Maintenance** on the Home menu.
2. Select **Pricing Profile** Distribution button.

3. Select **Database Type** for upload in the drop-down list. Available Database Types: **All, Mat, Moulding, Specials, Glazing, Inventory, Promotions, Art Conditions, Art Types, Mgr. Override Codes, Markup Grid Groups, Markup Grid Items & Package Pricing.**

**Demo Example:** Moulding

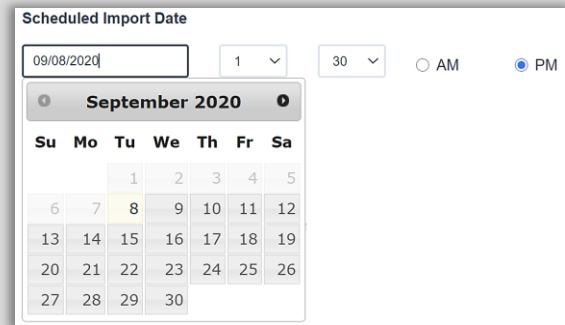


4. Select **Source Store** in the drop-down list. **Demo Example:** Training Gallery

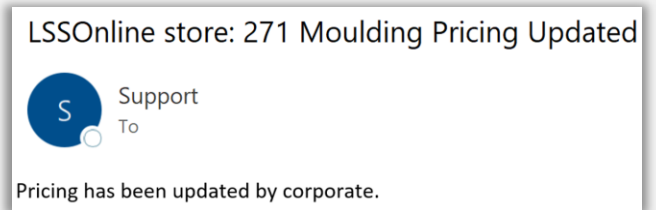
**Note:** The source store is the store you selected to export/import the Pricing & Product Profile.

5. **Schedule Import Date.**

- a. Touch/Click the Date field to open calendar. Select **Date**.
- b. Select **Hour and Minutes** in the drop-down list.
- c. Select **AM or PM**.



6. Select if you would like to **Notify** the store via email of the Pricing /Product upload.



7. Select **Destination Stores**.

8. Select **Upload**.

**Pricing Profile Distribution**

Choose database type for upload  
Moulding

Source Store  
Training Gallery LSSOnline store: 271

Scheduled Import Date  
09/08/2020 1:30 PM

Notify Store?

Destination Stores

- Training Gallery LSSOnline store: 271
- Gillis Online Johns
- LifeSaver Training 5555
- Yet Another Dan Test 16593 Cant, GA
- Vegas Test Store
- Vegas Framing

Upload

9. The following message will display. “Your import file and request has been received. We are importing your data and it should finish shortly. Thank you.”

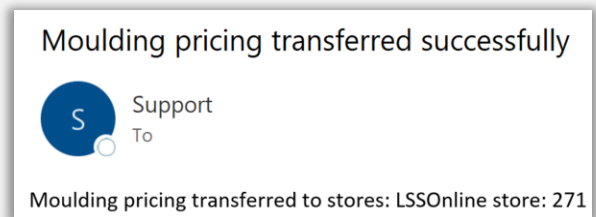
**Tip:** To upload an additional pricing profiles. Select **Home – Database Maintenance – Pricing Profile Distribution**.

Your import file and request has been received. We are importing your data and it should finish shortly.

Home

Import Another one

10. You will receive an email from Support stating if your Pricing Profile Upload was successful or failed. If the Pricing Profile Upload failed call Support. 1-800-381-0600



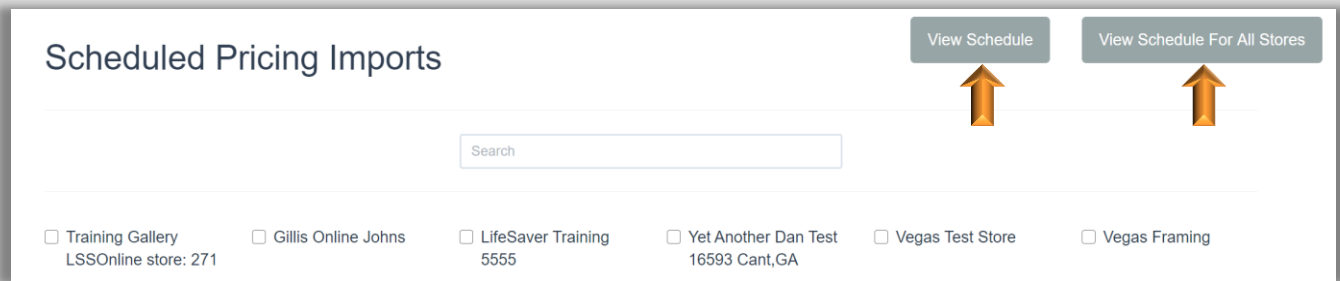
## View Scheduled Pricing Imports

View selected stores upcoming scheduled pricing imports.

1. Select **Database Maintenance** on the Home menu.
2. Select **Scheduled Pricing Imports** button.
3. Select Store(s) to view their Pricing Imports Schedule.

**Tip:** Use Search field to find a store in the list.

4. Select **View Schedule** or **View Schedule For All Stores** button.



5. The schedule will display the **Store, Database Type and Date**. An import can be canceled by selecting the **Cancel** button on the appropriate line item.
6. Select the **Done** button to exit the window.

