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 a www.lifesaversoft.com or call us toll free at 1-800-381-0600. We are available Monday thru 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**

Table of Contents

- **Print Services**

- **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

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*.
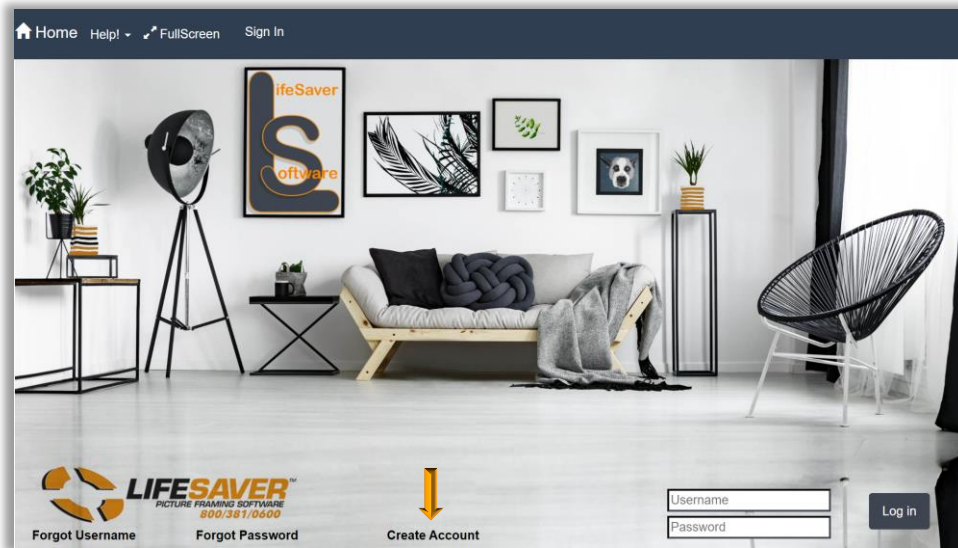
LifeSaver Cloud Log In - Register Screen

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 Screen

4. The LifeSaver Cloud Home Menu Screen will display.
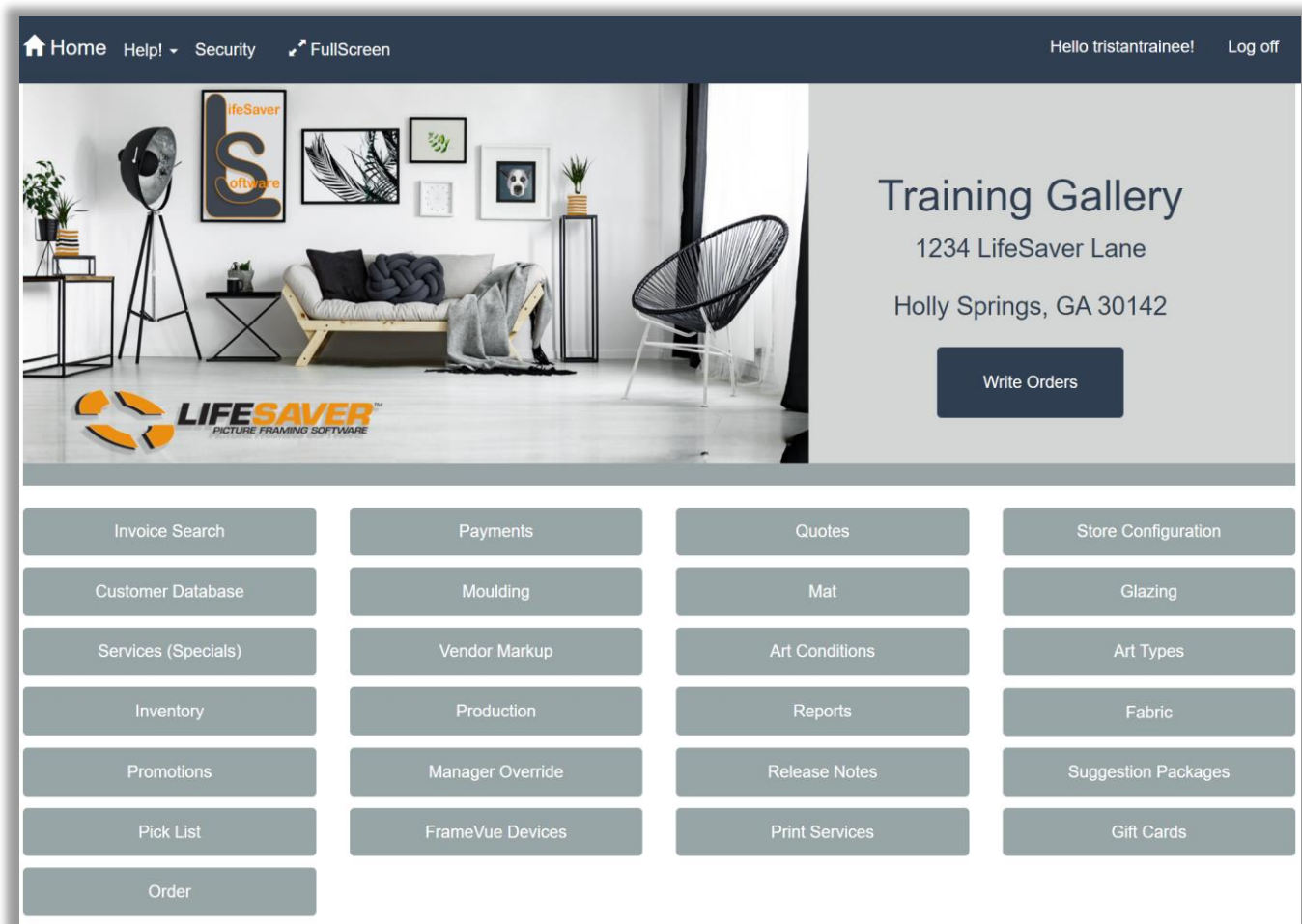
LifeSaver Cloud Home Menu

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.
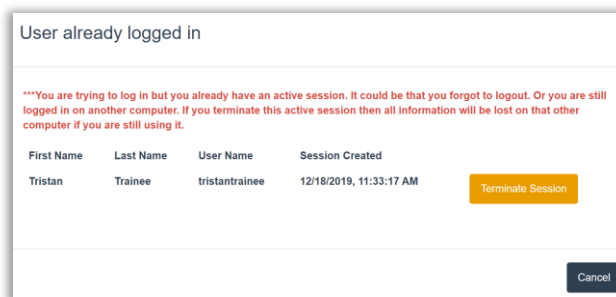
1. Touch/Click the *Terminate Session* button.

2. You will be 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 in again. It is always a 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**.
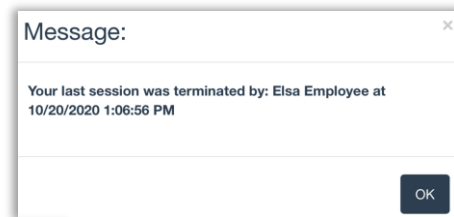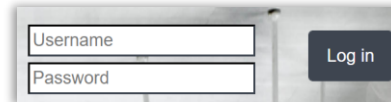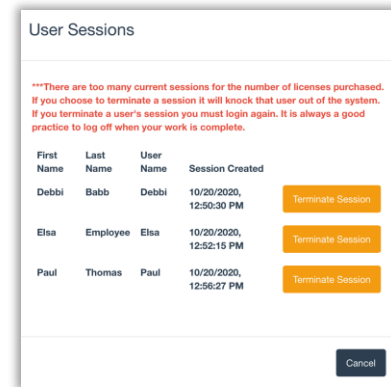
LifeSaver Cloud Home Screen Menu Option Descriptions
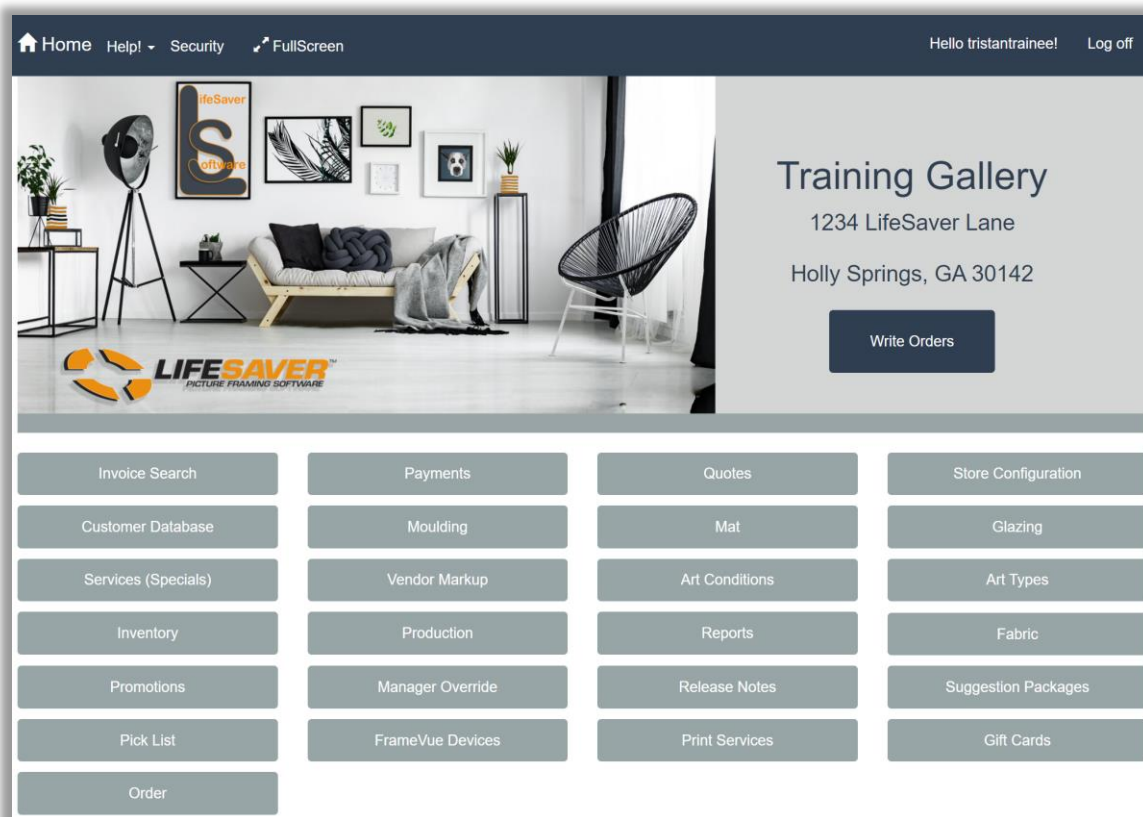
Home/Main Menu

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!:** Knowledge Base: Contact Support & Access User Manuals. Remote Access: Allow our Help Desk Team to access your program for requested assistance.

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. ⤢ **Full Screen Mode**: This is useful when using a tablet. On a desktop computer the EXC will exit full screen.

e. **Current User Greeting:** Hello Username!

f. **Log Off:** Sign out of the LSS Cloud Menu and return to the Log In screen. Use this option also to change users.

g. **Your Store Name**: Includes Street Address, City, State and Zip code.

h. **Write Orders:** Sell store product inventory, write custom design workorders, write/resume quotes and take payments.

i. **Invoice Search:** Search, view, process payment, edit or refund a previous invoice/workorder.

j. **Payment:** Process payments, edits and refunds on invoices/workorders.

k. **Quote:** Complete, print, resume or delete a quote.

l. **Store Configuration**: Setup your store's program, business and financial details.

m. **Customer Database:** Create, View, Edit or Delete Customer Profile Details. Can also view customer's invoice/workorder history.

n. **Moulding**: Add a moulding vendor. Search a moulding item code to display the mounding'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.

o. **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.

p. **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.

q. **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.

r. **Vendor Markup**: Add mat and moulding vendors to your program. Mat and Moulding markup charts.

s. **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.

t. **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.

u. **Inventory:** Create, Search, View or Edit your store's Art and Gallery inventory.

v. **Production and or Production New:** Manage production workshop by updating the status of a workorder/invoice.

w. **Reports:** Contains the following store reports – Payments, Orders, Work Orders, Paid in Full, Ticket Sales, Customer, Production, Material Usage, Invoices and Closing.

x. **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.

y. **Promotions:** Create, Edit and Delete a promotional discount.

z. **Manager Override:** Create Manager Override Reasons.

aa. **Release Notes:** Update details that include New Features and Bug Fixes.

bb. **Suggestion Packages:** Create FrameVue suggestion packages.

cc. **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.

dd. **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.

ee. **Print Services:** Print Services are available through IM Graphics Group, which is a division of International Moulding or Setup, Price and Offer your own store's printing services. *Coming Soon!*

ff. **Gift Cards:** Activate, Deactivate, Balance Inquiry. Merchant processor EVO and Z11 machine required to sell and redeem your custom printed gift cards.

gg. **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 is 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.

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 open hour time**. Touch/Click on the appropriate up/down arrow till you arrive at the **correct hour**. **Repeat** 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

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

Save

Store Configuration - Workshop Tab

Taxes Tab

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

1. Touch/Click on the **Taxes** tab.

2. For each line item that applies. Touch/Click the **Labor** field. Touch/Click the up/down arrows to **select desired number**.

3. Touch/Click the **Material** field. Touch/Click the up/down arrows to **select desired number**.

4. Touch/Click **Save** when all appropriate line items have been completed.

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

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

Store Configuration - Taxes Tab

Credit Card Processor Tab

Make your LifeSaver easier with integrated credit card processing. We offer 3 great solutions to simplify your credit card processing needs from great companies.

1. To Get Started with Cayan: Touch/Click the link**: Click here to Learn More about our NEW Integrated credit card processor Cayan!** or call *LifeSaver Support 1-800-381-0600* to request that a Cayan representative contact you. Cayan will provide you with the needed information to complete the Credit Card Processor tab.

2. To get started with EVO and the Z11 credit card processing machine go to **https://www.evopayments.us/lifesaver/** to sign up or call *LifeSaver Support 1-800-381-0600.* Touch/Click the *Merchant Processor* drop down arrow. Touch/Click *Dejavoo* which is the platform that EVO uses. EVO will provide you with the needed information to complete the Credit Card Processor tab.

3. To get started with Vantiv and the Z11 credit card processing machine go to **http://info.mercurypay.com/LifeSaver2015.html** to sign up or call *LifeSaver Support 1-800-381-0600.* Touch/Click the *Merchant Processor* drop down arrow. Touch/Click *Dejavoo* which is the platform that Vantiv uses. Vantiv will provide you with the needed information to complete the Credit Card Processor tab.

4. Touch/Click *Save* button.

Store Configuration – Credit Card Processor 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. **Mat Top, Bottom, Left & Right Reveal**: The default is 4 inches. To edit Touch/Click each field and **type desired reveal**.

3. **Reveals for the 2ⁿᵈ and 3ʳᵈ mat** are defaulted to ¼ inch. To edit Touch/Click each field and **type desired reveal**.

4. **Require Customer?:** Require that a customer is identified on every workorder/invoice. Touch/Click box to Select/De-Select.

5. 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.

6. **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**.

7. **Require Manager Override:** Select to require management approval (Login/Password) on all manager overrides on workorders.

8. **Require Art Type:** Select to require that the art type is selected on all work orders.

9. **Require Art Condition:** Select to require that the art condition is selected on all work orders.

10. **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.

11. **Lock Moulding UOM?:** Select to lock the default moulding unit of measure on the workorder screen.

12. **Prompt to Check Fillet Width?:** Add reminder for the user to ensure that the fillet width is correct.

13. **Hide the Discount Option When You Write a Workorder:** Select if you would like no access to the Discount Menu on the workorder.

14. ***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)*

15. ***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.

16. ***Use New Production Screen?:*** Select to implement New Production menu.

17. ***Show Glazing on Layer:*** Select to display Glazing on Layer as a moulding option in the workorder.

18. ***Decrement Inventory:*** Reduce the on-hand inventory quantity when an item is sold. Only applies to inventory items.

19. ***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.

20. ***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.

21. ***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.

22. ***Show Frame Club payment option on the payment screen?*** (Company Specific)

23. ***Additional Amount Per Mat.*** Type in field additional dollar amount to be added to the mat price in a workorder***.***

24. ***Additional Amount Per Mounting.*** Type in field additional dollar amount to be added to the mounting price in a workorder***.***

25. ***Approximate Date on workorder?*** Will add the word "Estimated" in front of "Due Date" on the invoice.

26. ***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.*

27. ***Default Moulding UOM:*** Select the default moulding unit of measure (Join-Chop-Length) for <u>all</u> moulding vendors in your database. Leave selection on None if you would like to setup the default UOM by moulding vendor.

28. ***Default Mat Costing Method:*** Select the default mat costing method (Sq. Inch – Sq. Meter – UI – Sheet – Cut Sheet – Quarter Sheet) for <u>all</u> mat vendors in your database. Leave selection on None if you would like to setup the default costing method by mat vendor.

29. *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.

30. *Print Invoice and Workorder in Black and White?* Default setting is Color ink. Select if you would like to only print in Black and white ink.

31. *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.

32. *Allow manual entry items on an invoice?:* Select if you do not want the option to add manual entry items to the invoice.

33. *Show charge account payment option on the payment screen?: Select* if you offer in-house charge accounts.

34. *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.

35. *Measurement Unit:* Select Inch (Imperial) or Millimeter (Metric).

36. *Currency Type:* Select currency type in the drop-down list.

37. *Do not show details on quote?:* Select if you only want the Quote to display subtotal, tax and total on the Quote form.

38. *Do not show totals on workorder?:* Select if you do not want the workorder total cost to display on the workorder form.

39. *Include inventory items on production screen?:* In addition to workorders select this option to display inventory items sold to the customer.

40. *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.

41. *Do not show cost on pick list?:* Select if you do not want the costs to display on the pick list.

42. *IM Print Default Distribution Center:* Select location if applicable.

43. *Show Groupon Payment option on the payment screen?* Select if you would like to accept Groupons.

44. *Order Screen*: Number of days to search date from current date.

45. *Additional amount per glazing:* Add additional dollar amount to be added to the glazing price in a workorder.

46. *Minimum mat price is X times cost:* When calculating retail ensure that the price is at least *number of times* the cost of the whole board.

47. *Show TruVue Glazing Pop-Up?* Will ask user if they would like to upgrade to the next level up of TruVue glazing and the cost.

48. *Order Screen. Require payment before delivery?* Workorders must be paid in full before they are delivered.

Configure – Settings Tab

49. Click on *Save.*

Edit store address, email or phone number that was initially entered during the registration process or add to fields that are currenlty missing data.

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.

    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.

Store Configuration

| Workshop | Taxes | Credit Card Processor | Settings | Store Information | Printing | Production |

Store Name	Training Gallery	**Email**	tristan@gmail.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		

Save

Store Configuration – Store Information

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

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

2. Touch/Click in the *Disclaimer field(s)* and *Type* your disclaimer *Message*.

3. Touch Click the **Require Signature** box if the disclaimer needs a customer signature line.

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

Store Configuration – Printing Tab

Production

Designate a store's production facility location. (Multi-Store)
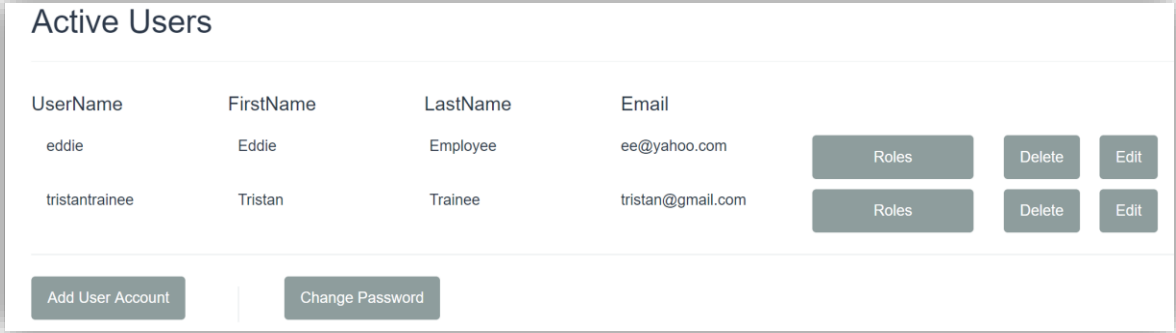
1. Select **Location Name** in the drop-down list.

2. Touch/Click **Save**.

Store Configuration - Production

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.
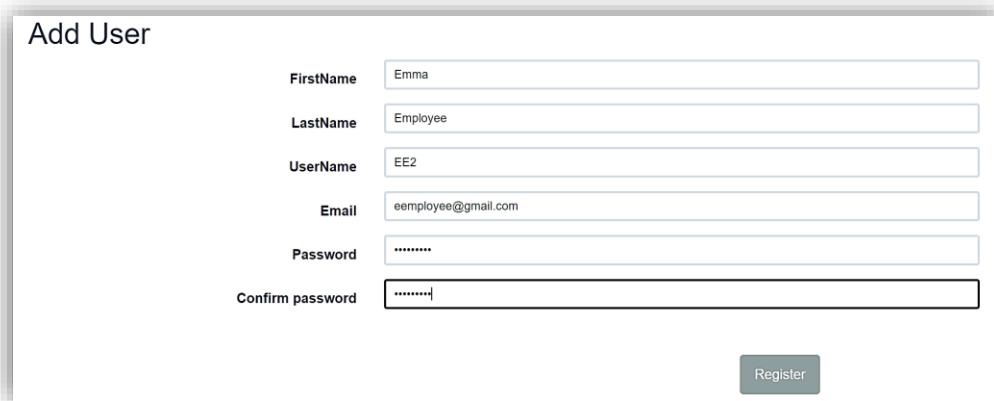
Security Screen

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

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.
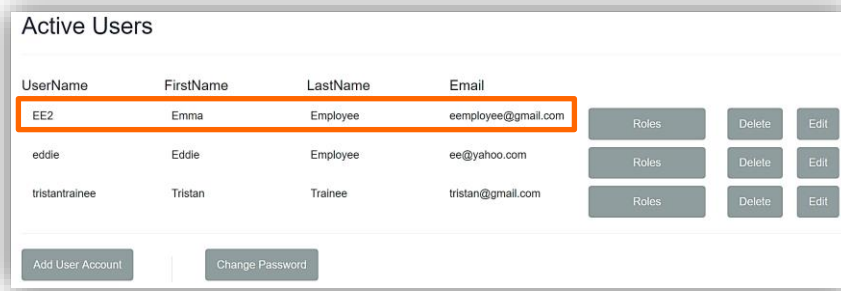
Security - Active Users

Set Role Permissions
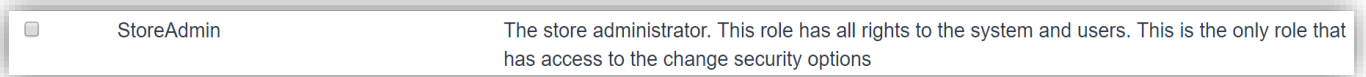
Individual

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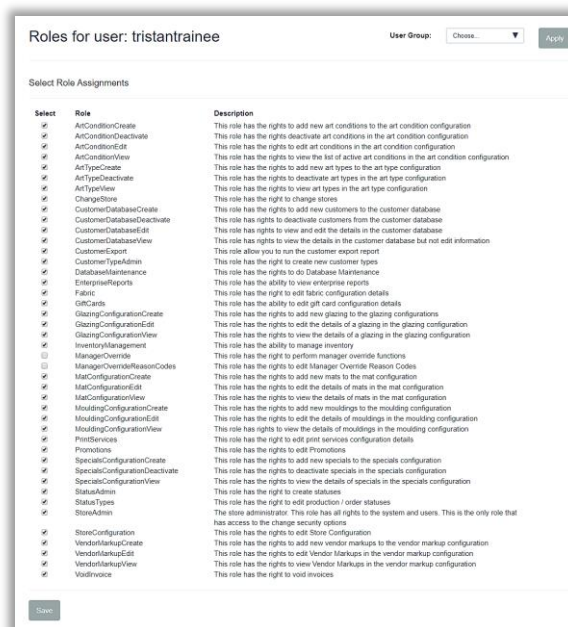
     Note: Roles can be edited at any time.

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

Store Admin Security Role

4.   Touch/Click the *Save* button.

Security: User Role Assignments

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.*
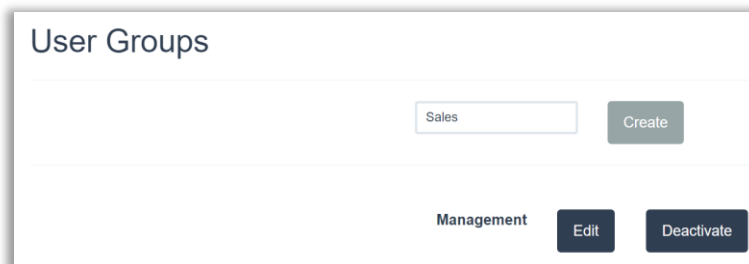
Create

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

2. Touch/Click **User Group** located upper right corner.
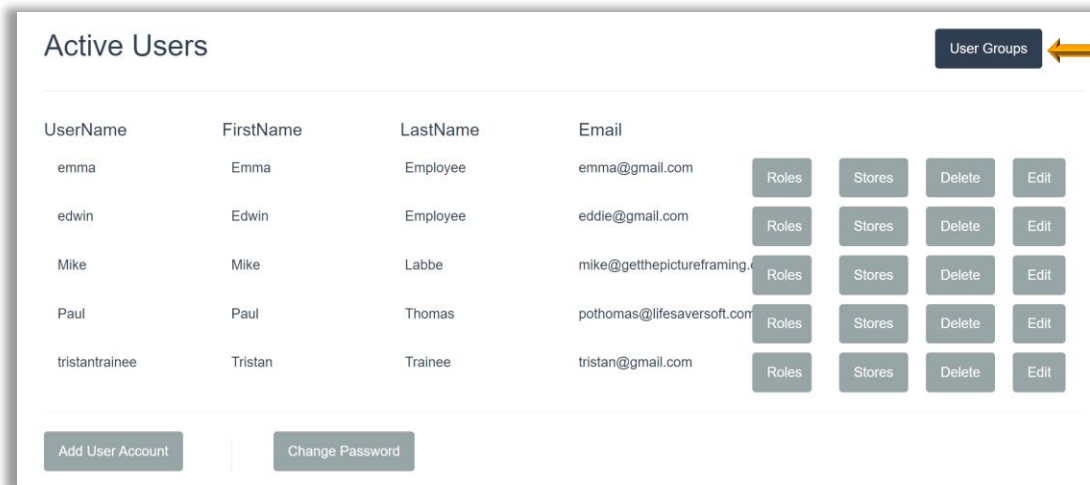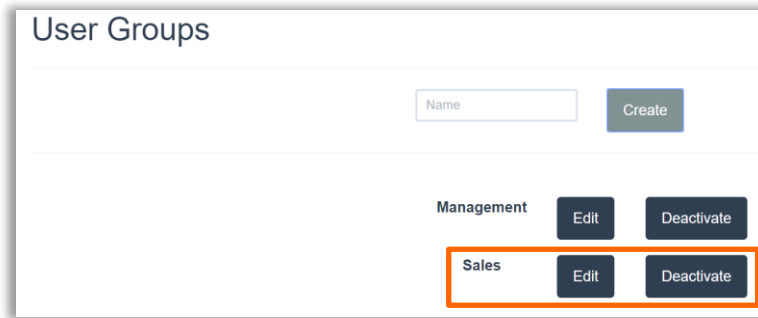

Security – Create User Group

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.
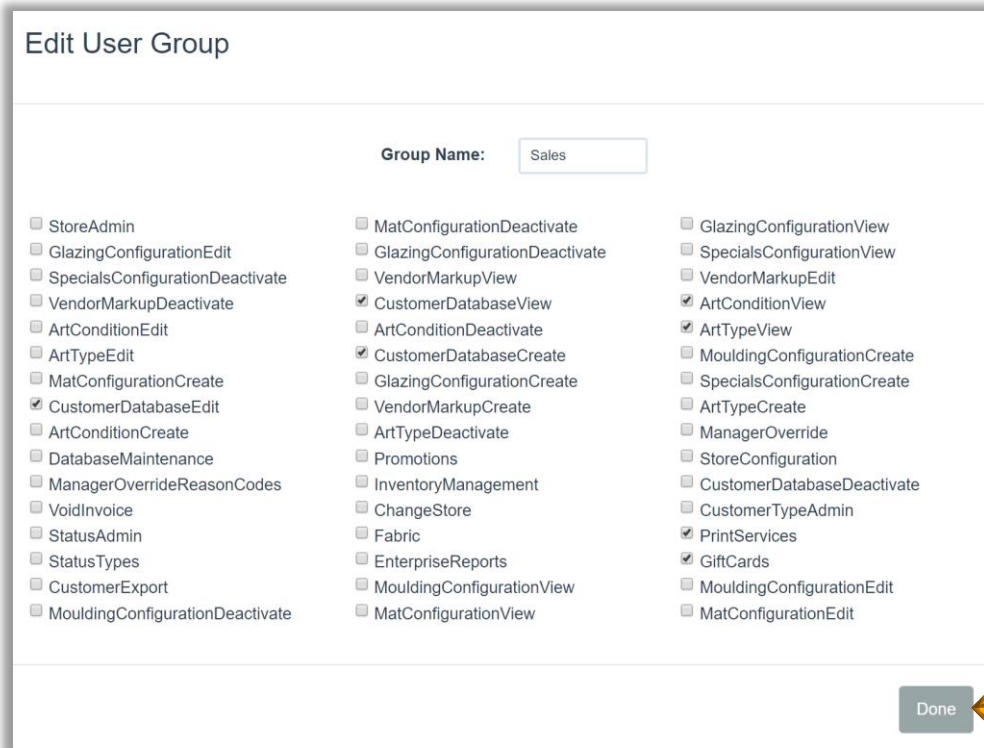
Security – Edit User Group

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

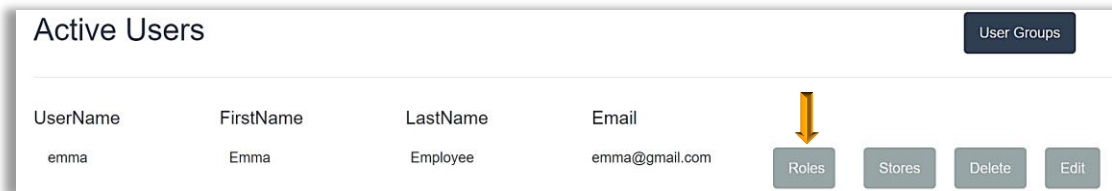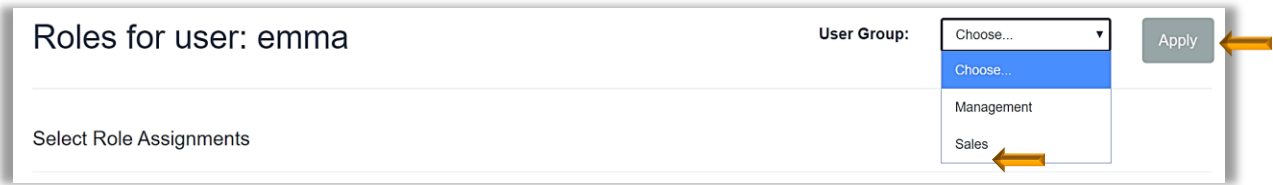3. Touch/Click the *User Group Drop Down Arrow*. Touch/Click *User Group Name*. *Demo Example*: *Sales*

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*
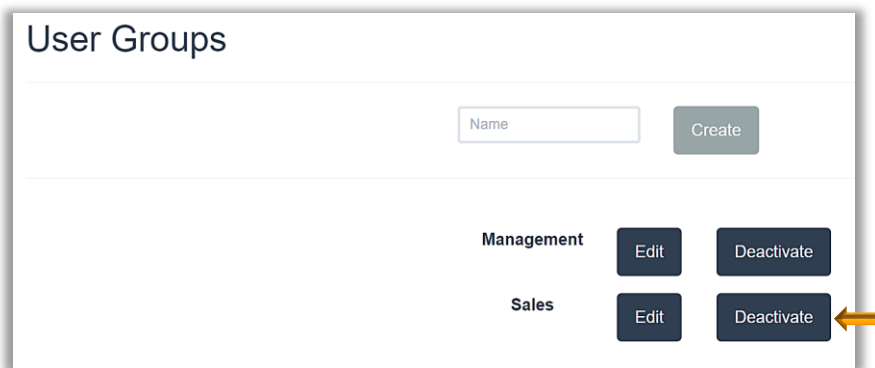
Security – Deactivate User Group

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.
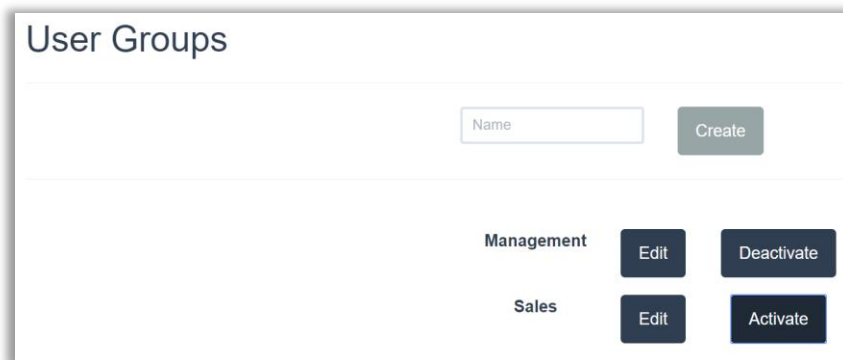
Security – Deactivate User Group

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.*

Security – Active User

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

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


Edit Employee/User Profile

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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.
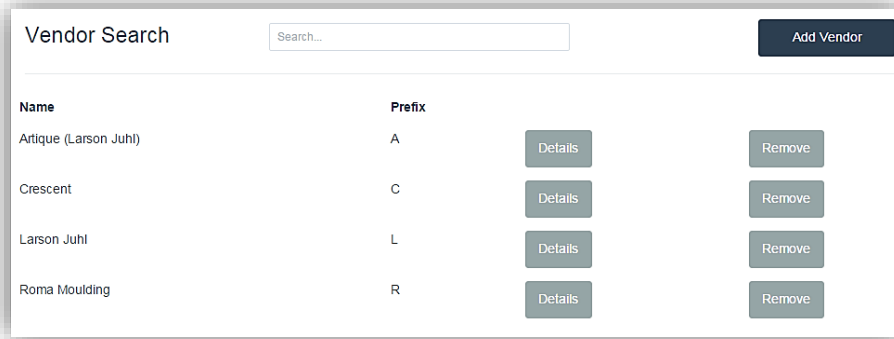
Vendor Markup – Search/Add Vendor

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.
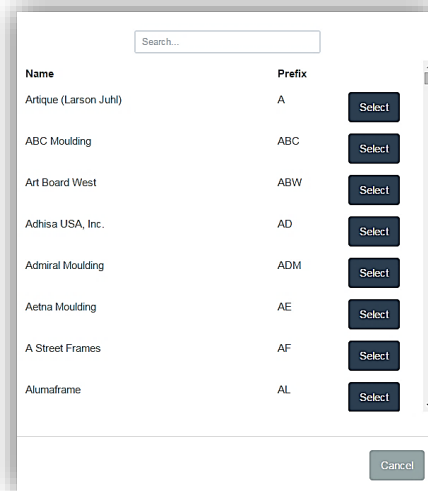
Add Vendor Window

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.

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*.
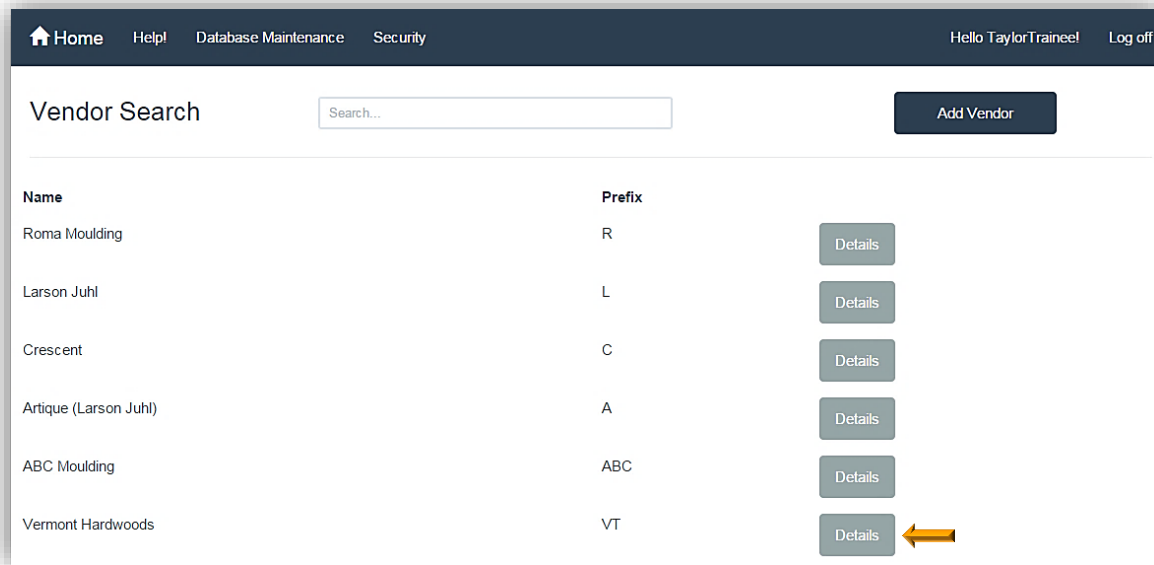
Vendor Markup - Vendor List - Details

3. 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 stores 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 display.

Vendor Details for Larson Juhl   Apply Default Markup

Moulding   Default UOM: Length ⌄

Chop   Join   Length   Wedge   UI Group

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

Add Row

Save

Vendor Details – Default Markup Table

4. 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.

5. 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*

6. 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*

7. 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.
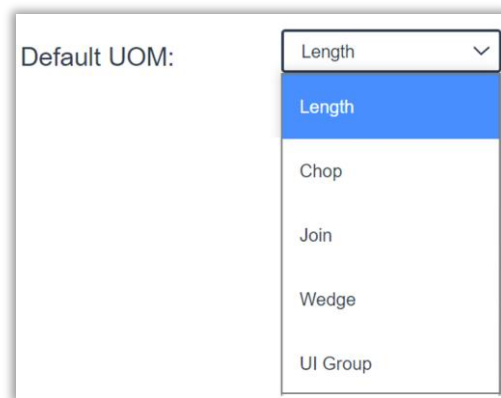
13. Touch/Click ***Save.***

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
0.0000	0.9999	0.0000	5.40	.00
1.0000	1.4999	0.0000	4.60	.00
1.5000	1.9999	0.0000	4.40	.00
2.0000	2.9999	0.0000	4.30	.00
3.0000	3.9999	0.0000	4.10	.00
4.0000	4.9999	0.0000	3.90	.00
5.0000	6.9999	0.0000	3.60	.00
7.0000	8.9999	0.0000	3.40	.00
9.0000	9.9999	0.0000	3.20	.00
10.0000	9999.9999	0.0000	3.00	.00

Add Row

Save

Moulding – Completed Length Tab Markup Table by Vendor

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

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

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

2. Touch/Click the Add Vendor button.

3. Touch/Click **Default Moulding Details** in the vendor list.

Add "Default Vendor"

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

Add Vendor Account
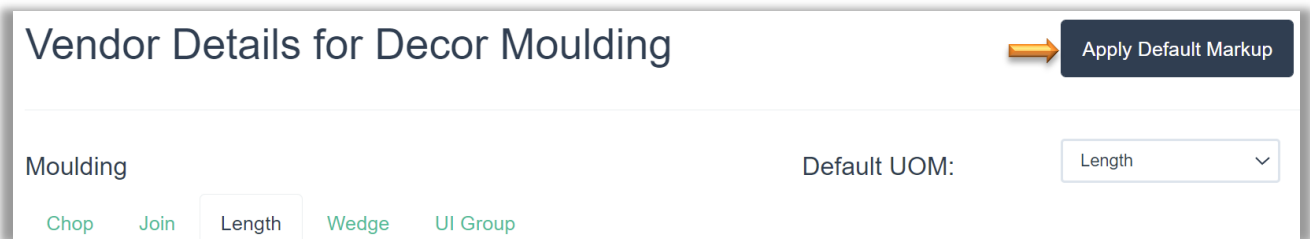
5. Follow the Set Moulding Markup instructional steps in the previous section.

6. Touch/Click **Save.**

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.

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 that are available in the markup table: Pack, Cut Sheet, Sheet. If a vendor does not offer a mat type, it will not appear in the markup table. The following categories can be set for each: Minimum price to Maximum price range, Markup, Vendor Discount and Costing Method. The costing Methods available are Square Inch, Square Meter, United Inch, Sheet, Cut Sheet and Unknown.

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

Set Mat Markup Table

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

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

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

3. Touch/Click on ***Sheet or UI Group tab*** to set markup table.
   Note: Cut Sheet coming soon!

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

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

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

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

Vendor Details for Crescent

Apply Default Markup

Mats

Default UOM:

Sheet				
Sheet				
UI Group				

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.*

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	9999.99	3.40	0

Add Row

Save

Fabric 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.*

| Select Vendor | Roma Moulding ▼ | Moulding Search | ramino | Create Moulding | Add Vendor |

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

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Moulding Search

4. Touch/Click the **Details** button on the desired line item to view moulding details. **Demo Example**: *R100153*

5. The Moulding Details screen will display the following information. Touch/Click the **Back** button to return to the Main Moulding Menu.

a. Name
b. Description
c. Vendor
d. Width
e. Height
f. UPC
g. Bin
h. Moulding Type
i. Use in Art Cloud

- Chop Cost
- Join Cost
- Length Cost
- Other Cost
- Chop Markup
- Join Markup
- Length Markup
- Other Markup

Moulding Details

Name	R100153
Description	Ramino 2 1/2 Mahogany Lacquer with Gol
Vendor	Roma Moulding
Width	2.5
Height	0
UPC	0
Bin	
Moulding Type	Moulding
Use in Art Cloud	

Chop Cost	$	19.63
Join Cost	$	0.00
Length Cost	$	12.60
Other Cost	$	0
Chop Markup		2
Join Markup		3.09999990463257
Length Markup		3
Other Markup		3

Back   Create Store Moulding

Moulding Details

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.

<u>Option 1</u>: 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".

<u>Option 2</u>: 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 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.

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.
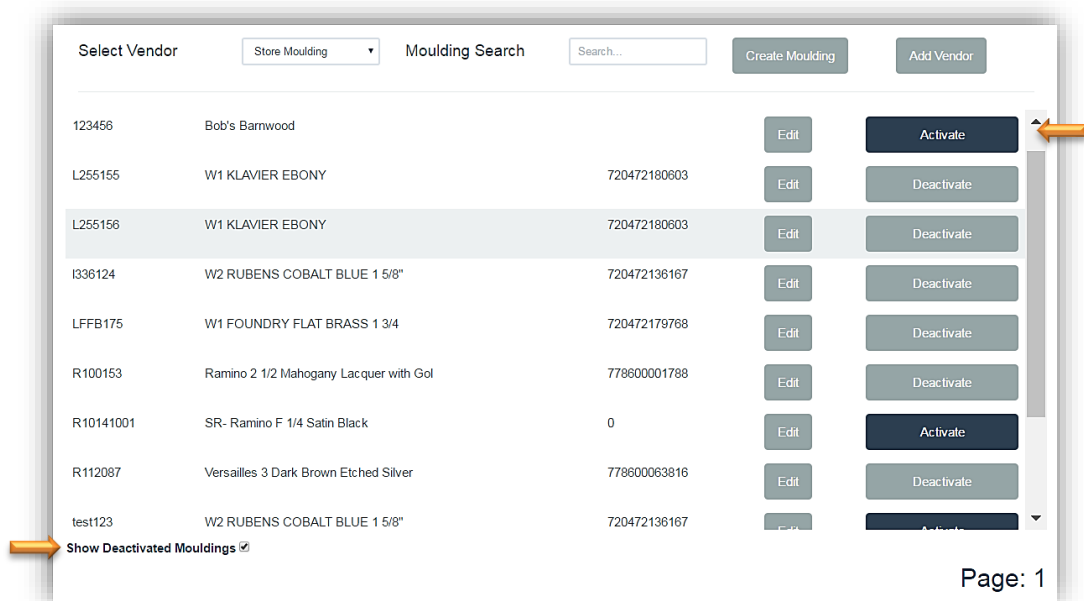
Add Moulding Vendor

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.*

Select Vendor	Crescent ▾	Mat Search	red		Create Mat		Add Vendor
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		

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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

Mat Details

Name	C1000
Description	Pompano Beach White
Vendor	Crescent
Sheet Size:	40 X 32
Bin	
Ply	4
UPC	93924201219

Cost	8.41
Costing Method	Square Inch
Notes	

Back   Create Store Mat

Mat Details Screen

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.

Store Mat Inventory List

Edit Store Mat

Edit mat product details.

1. Touch/Click the *Edit* button on the desired mat line item.

2. Touch/Click appropriate fields to *Edit* on the Create/Edit Mat Details Screen - Backspace current data to remove – *Type New Data* into the field.

3. Touch/Click the *Save* button.

Add Mat Vendor

Refer to instructions in the Vendor Markup section.

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

Select Vendor - Search - Details

1. Touch/Click **Select Vendor** field drop down arrow. Touch/Click the **Vendor Name** that you would like to Search. All the fabric inventory for that vendor will list on the screen. **Demo Example:** *Raphael's Master Source Fabric*

2. The entire fabric product line for the selected vendor will list. Use the slider bar to scroll through the list.

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

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

Fabric Search Screen

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

Fabric Details

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

Back

Fabric Details Screen

Add Fabric Vendor

Refer to instructions in the Vendor Markup section.

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.

<u>Search</u>

1. Type in Glazing by Name, Description, Substrate or Category in the Search field.

2. *List will appear that contains your search word(s).*

Glazing Search   Search...   Create Glazing

Show Deactivated Glazings ☐

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

Glazing Search Screen

Set Glazing Markups

Set glazing markups for glass, mirror and acrylic.

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.

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.

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**.

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9. Repeat steps 7 and 8 to add additional line items to the table.

10. Click on the *Save* button when complete.

Create Glazing Screen

Deactivate – Display Deactivated - Activate Glazing

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

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

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

Display Deactivated Glazing Type(s)

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

Activate Glazing Type(s)

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

Glazing – Activate/Deactivate

Services - Specials

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

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

Note: *The screen will display a list of pre-programed services (specials). The labor and material cost, markup and costing method for each preprogramed 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).*
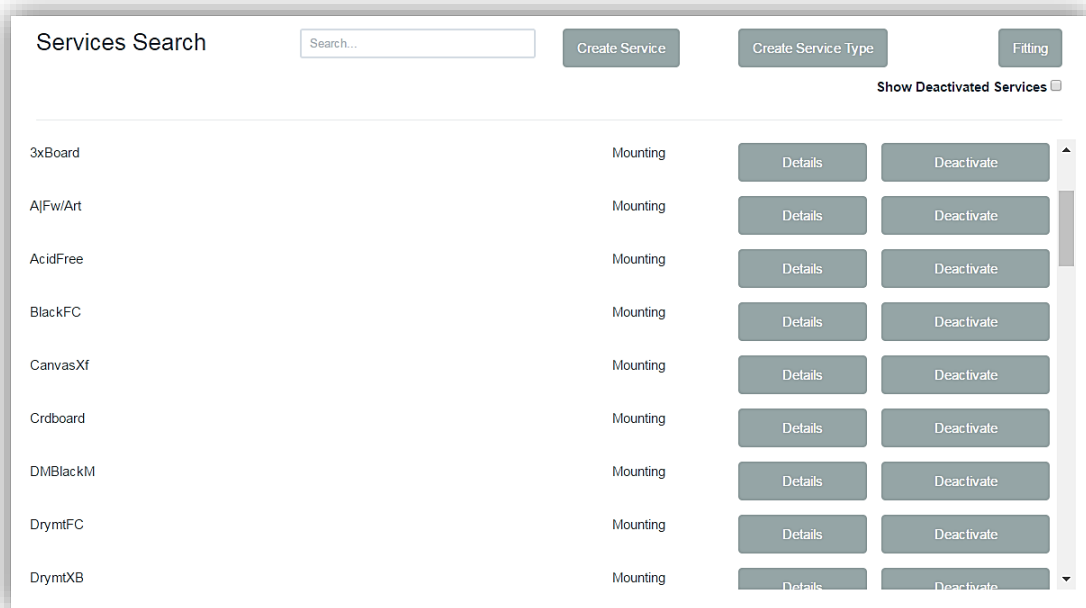
Services Screen

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.

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.
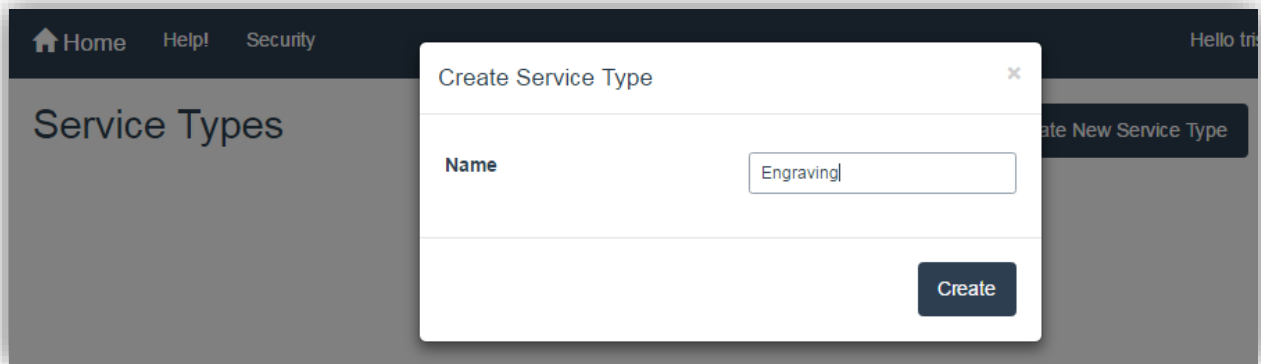
Create Service Type

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

Specials

Mounting

Stretching

Engraving

W / O Comments
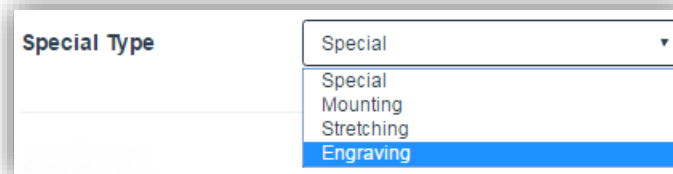
7. The new service type (Engraving) will also be available for selection under the Specials category on the Workorder screen.
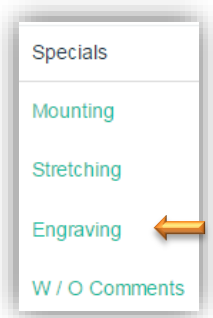
Create New Service

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**.

   Demo Example: Engraving Fee: $3.00 per word/Symbol

   a. Touch/Click Name field. Type **# Word/Symbol.**
   b. Touch/Click Description field: **Type Fee per Word/Symbol.**
   c. Touch/Click **Engraving** in the Special Type drop down menu.
   d. Touch/Click **Labor Cost** field in the **Standard** column. Type **3.00.**
   e. Touch/Click **Unit** in the **Labor Costing Method** drop down menu.
   f. Touch/Click **Save** button.

Special Details

Name	# Word/Symbol		Reminder Message	
Description	Fee per Word/Symbol			
Special Type	Engraving ▾		Unit of Measure	Inch ▾

Standard			Oversize	
Height	0		Labor Cost	0.00
Width	0		Labor Markup	0
Labor Cost	3.00		Labor Costing Method	Unit ▾
Labor Markup	0		Material Cost	0.00
Labor Costing Method	Unit ▾		Material Markup	0
Material Cost	0.00		Material Costing Method	Unit ▾
Material Markup	0			
Material Costing Method	Unit ▾			

Save

Create Services/Specials Details

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3. Touch/Click the *Save* button when complete.

   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.

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.

Create Fitting Fee

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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	1 HrLbr		Reminder Message	
Description				
Special Type	Special ▼		Unit of Measure	Inch ▼
Min Amount Labor	0		Use UI grid pricing?	☐
Min Amount Material	0		Auto check on new Work Orders?	☐

Standard

Height	32
Width	40
Labor Cost	35
Labor Markup	1
Labor Costing Method	Unit ▼
Material Cost	0
Material Markup	1
Material Costing Method	Unit ▼

Oversize

Labor Cost	35
Labor Markup	1
Labor Costing Method	Unit ▼
Material Cost	0
Material Markup	1
Material Costing Method	Unit ▼

Service/Special Details

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.

Service (Special) Details - Auto Select

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.
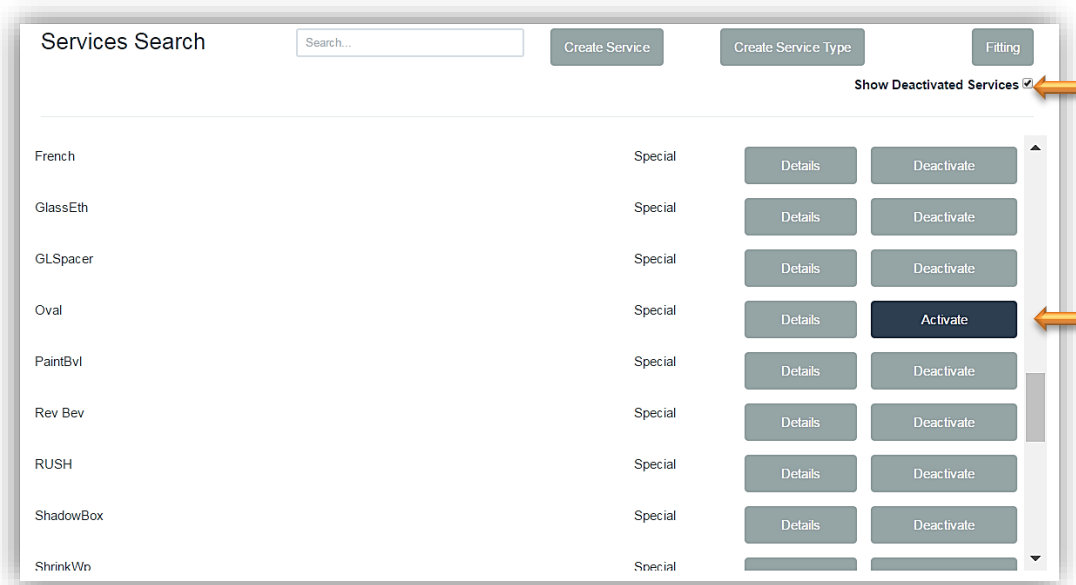
Deactivate – Activate – Show Deactivated Services

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

Art Conditions

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. Screen will display pre-programed **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.
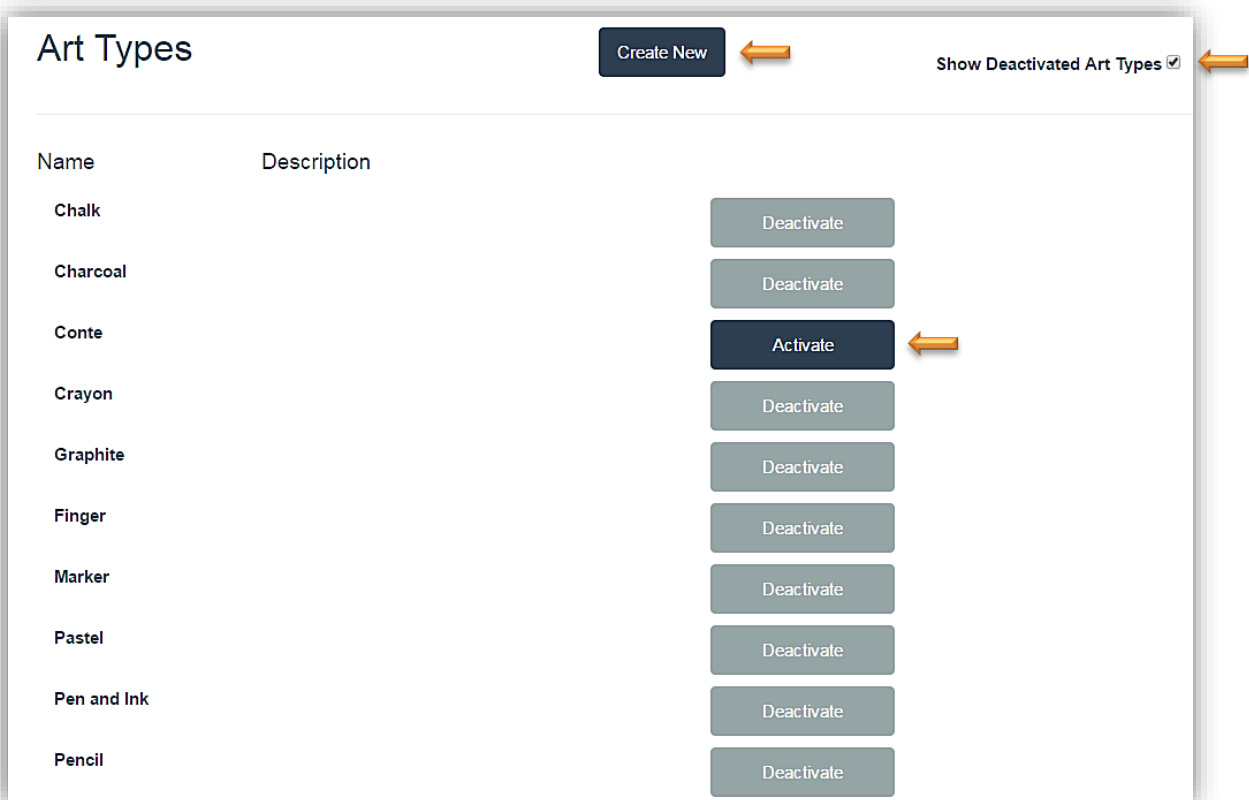
Art Types

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 Inventory Item - Art

Add Inventory – Finished Product

Add Inventory - Supply

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.

Warning
Your inventory is low for: F1234: Print
OK
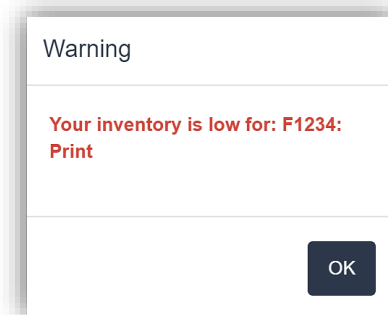
Search - Edit – Deactivate – Activate Inventory Item

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) .
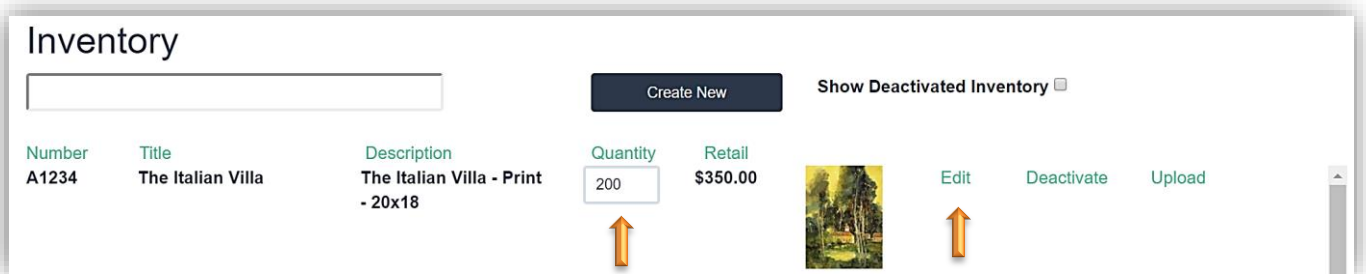
Edit

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.
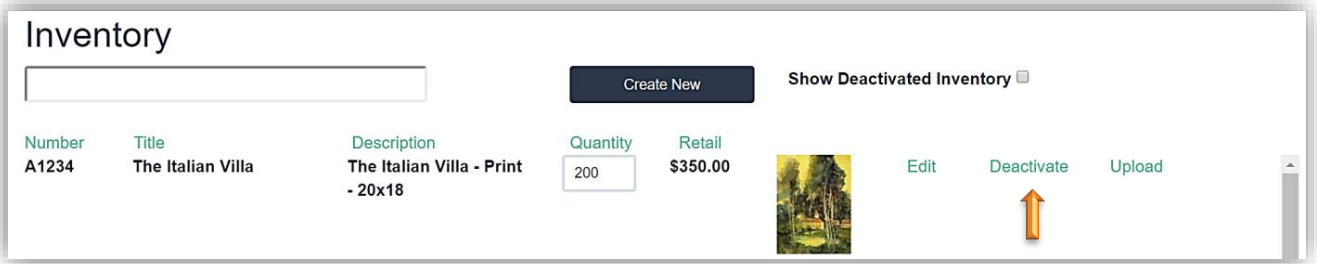

Inventory - Edit Record/Quantity

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.
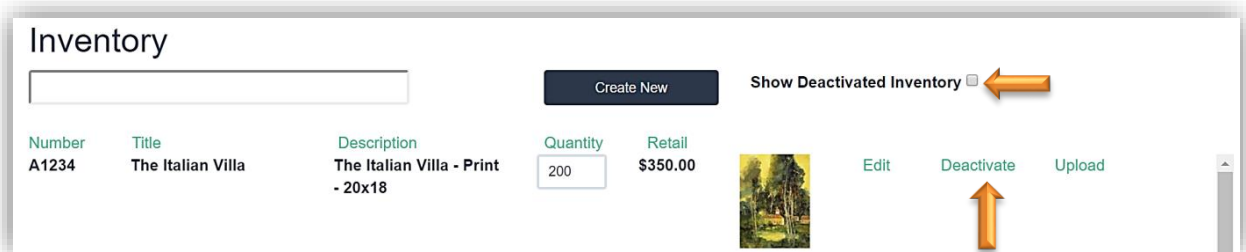

Inventory Menu – Deactivate Item

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.

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

Inventory Menu – Activate Item

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.

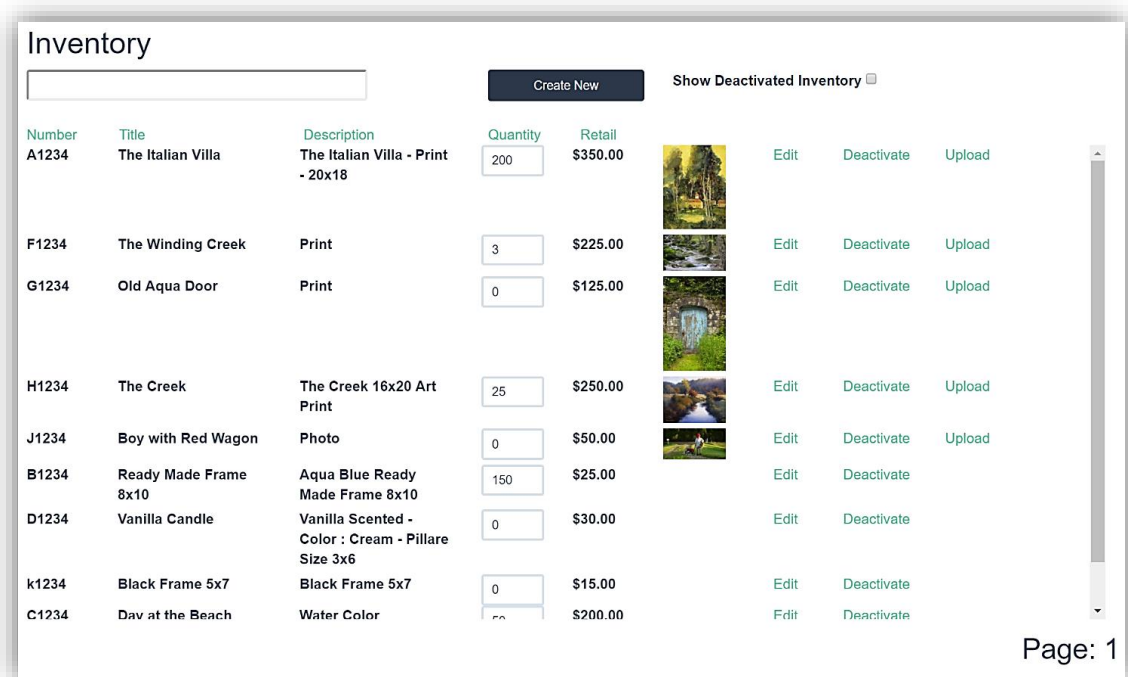   **Note:** *The Upload Image option only applies to inventory items that are programed under the type: Art Item.*

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 sucessfully. Touch/Click the **OK** button.
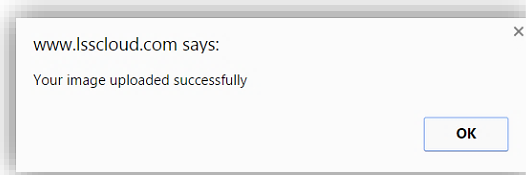
4. Image/Photo will display on the corresponding art inventory line item.

Inventory Main Menu Screen

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

Sell store product inventory, write a custom design workorder(s) and process payment.

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: ***L169240***

- 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.

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

Create Workorder

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.*

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

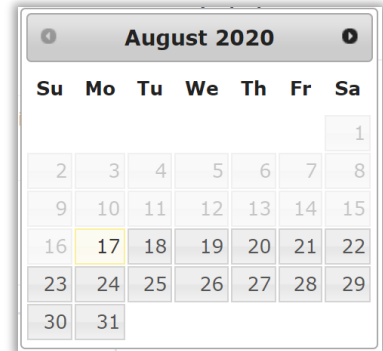*Tip: Can select more than one art type. To remove selection, click on the previous selected art type.*

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.

◓	August 2020	◒

Su	Mo	Tu	We	Th	Fr	Sa
						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					

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

| Image Size	Height	20	Width	20	Finished Size: 20 X 20

Image and Finished Size

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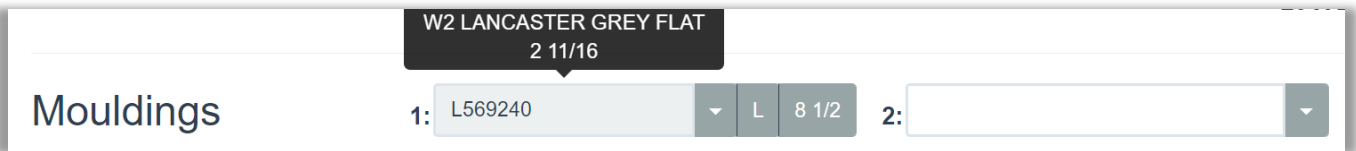

Default Moulding Cut & Footage

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.

Moulding Options Menu

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.
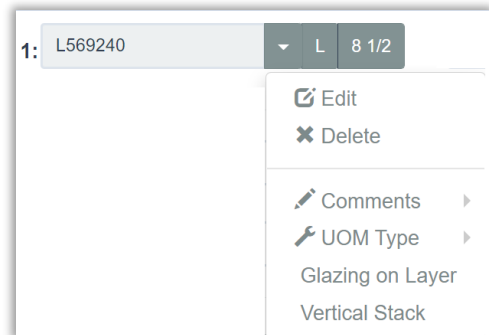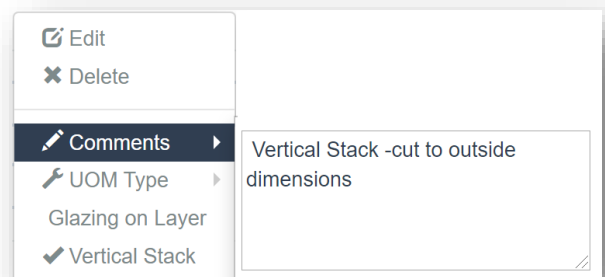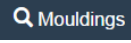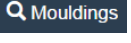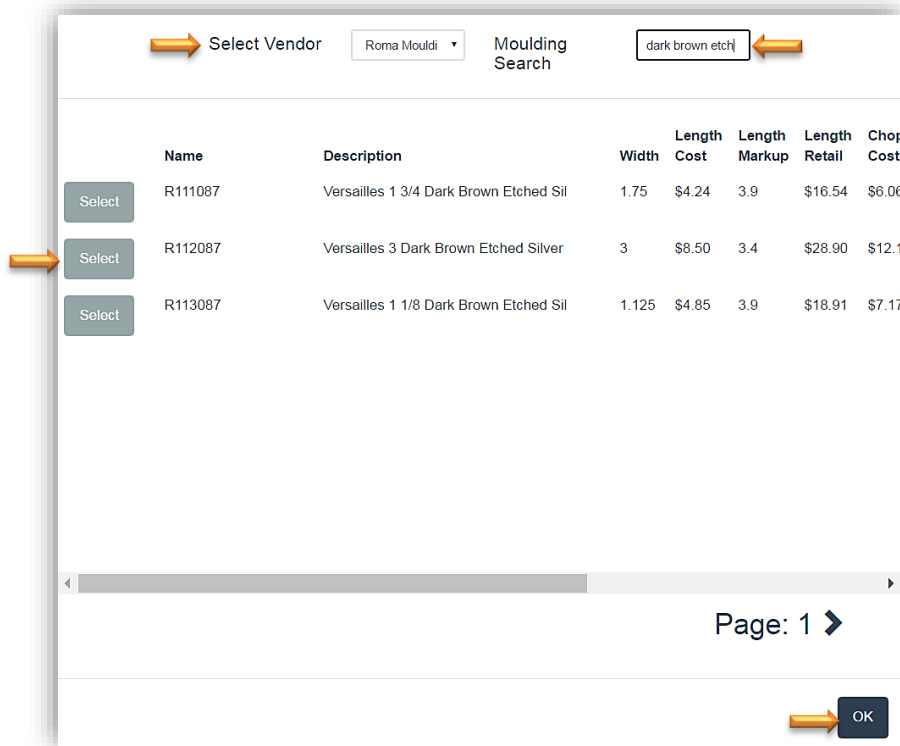

Vertical Stack - Default Comments

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.
   a. Touch/Click *Moulding Field*. *Note: Cursor must be located in an empty moulding field.*
   b. Touch/Click the *Search Mouldings* option [🔍 Mouldings] 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: Roma*
   d. Touch/Click *Moulding Search* field. Type *Search Data* such as: partial item #, color, width, description etc.
   e. Touch/Click/Drag bottom Scroll Bar to view all the moulding'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 moulding to the workorder. The item number will auto fill into the moulding field.

Search/View Moulding Details using Search Mouldings option.
   a. Search and View the Mouldings at any time during the workorder process.
   b. Touch/Click the *Search Mouldings* option [🔍 Mouldings] 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: Roma*
   d. Touch/Click *Moulding Search* field. Type *Search Data* such as: partial item #, color, width, description etc.
   e. Touch/Click/Drag bottom Scroll Bar to view the moulding'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.

	Name	Description	Width	Length Cost	Length Markup	Length Retail	Chop Cost
Select	R111087	Versailles 1 3/4 Dark Brown Etched Sil	1.75	$4.24	3.9	$16.54	$6.06
Select	R112087	Versailles 3 Dark Brown Etched Silver	3	$8.50	3.4	$28.90	$12.1
Select	R113087	Versailles 1 1/8 Dark Brown Etched Sil	1.125	$4.85	3.9	$18.91	$7.17

Select Vendor [Roma Mouldi ▼] Moulding Search [dark brown etch]
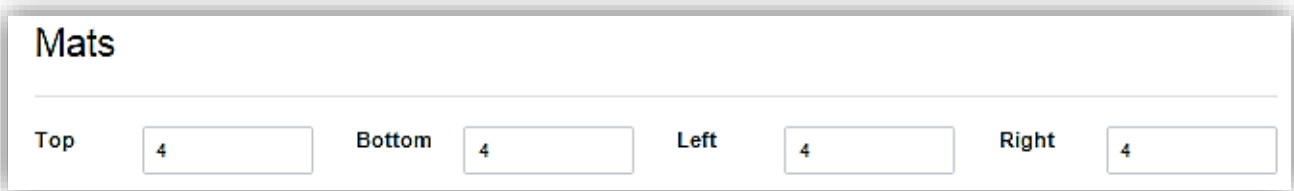
Page: 1 ❯

OK

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 | 4 | Bottom | 4 | Left | 4 | Right | 4 |

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 and 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.

Dang! An error has occured:
- Mat is not large enough for finished size related info: C81027 Layer:1 LargerMat:C81027

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**.

- o **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.

- o **Top Mount: Template 35**. The top, bottom, left and right mat widths will be disabled when top mount is selected.

- o **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
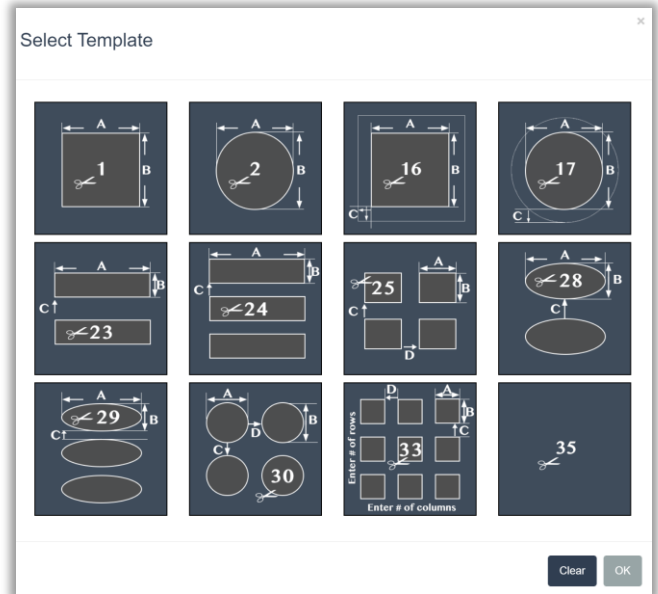
Template Options
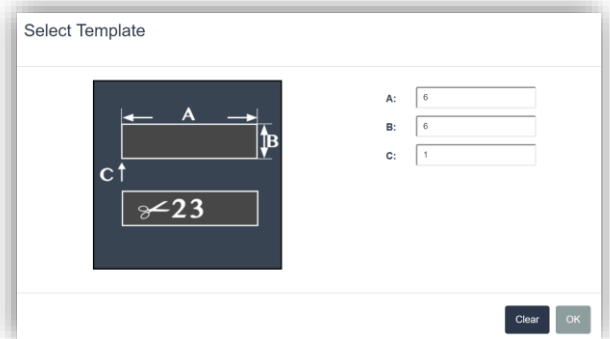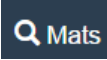
Template Dimensions
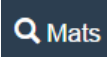
Bevel Options

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 **Q Mats** 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 **Q Mats** 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.

Name	Description	Oversize	Sheet Cost	Markup	Retail	
C1108	Dark Cream	No	$21.06	4.1	$86.35	Select
C1152	Cream 2 ply	No	$8.69	4.6	$39.97	Select
C1155	Cream	No	$15.10	4.3	$64.93	Select
C1161	Cream	Yes	$31.92	3.9	$124.49	Select
C1173	Soft Cream	No	$21.06	4.1	$86.35	Select
C1531	Off White/Cream Duplex	No	$16.99	4.3	$73.06	Select
C1608	Cream	No	$18.11	4.3	$77.87	Select
C22255	Cream 8 ply	No	$46.76	3.6	$168.34	

Select Vendor: Crescent   Mat Search: cream

Page: 1 ❯

OK
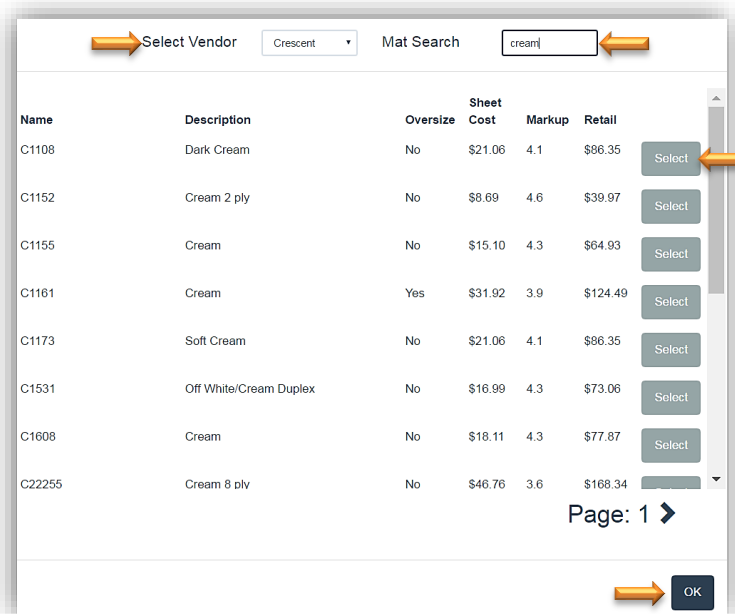
Write Order – Search Mats

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.

20. Touch/Click on the third *Mat/Fillet* field and type mat item number C*9546.*

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

3 Mats in the Workorder

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.

Edit Mat Reveal

22. Touch/Click the second *Mat/Fillet* field in row 4. Type in the fillet item number *L169240*. 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.

Fillet Options

    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.*
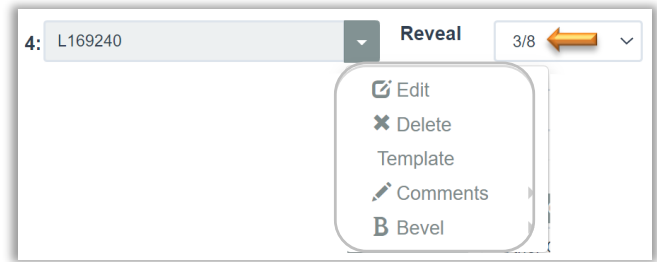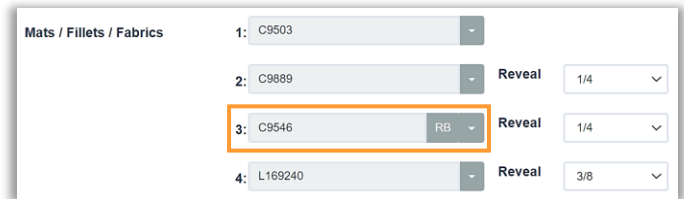
Default Reverse Bevel

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

Glazing Options

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.

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.

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.
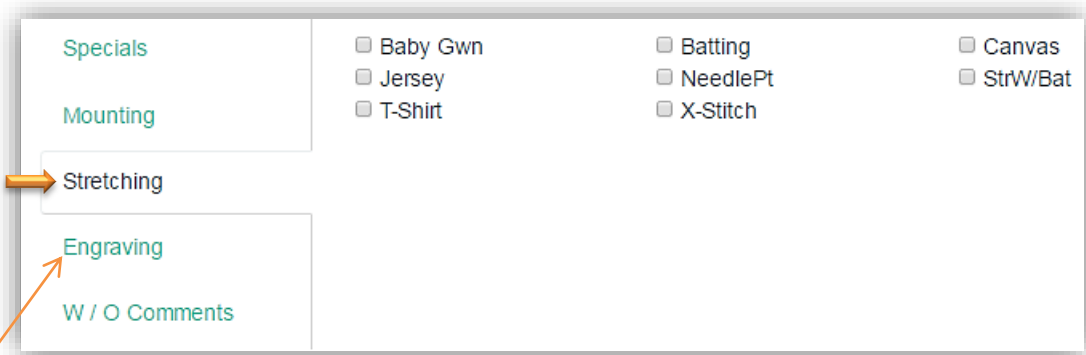
Workorder Stretching Types

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.
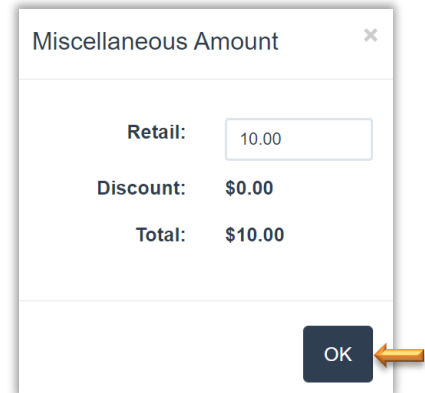
Add Art/Supply Window

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

Workorder Demo Example: *$10.00*
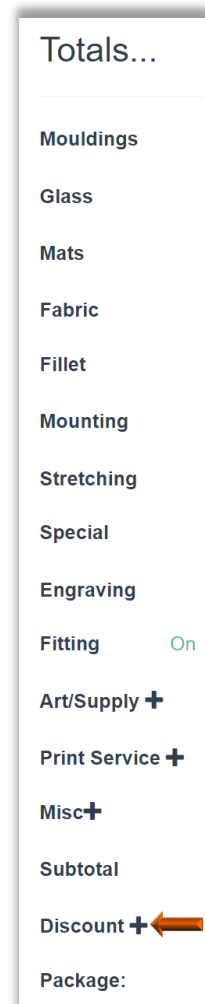
a. Touch/Click the *Misc. +* button in the Totals column.
b. Type *Dollar Amount* into Miscellaneous Amount Entry field.
c. If a discount was applied to the workorder, the discounted amount will display.
d. Touch/Click *OK* button.
e. Amount will display in the write order total column adjacent to Misc +.

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

Miscellaneous Amount	✕
Retail:	10.00
Discount:	**$0.00**
Total:	**$10.00**
	OK

Misc. Amount Entry Window

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

Totals...

Mouldings

Glass

Mats

Fabric

Fillet

Mounting

Stretching

Special

Engraving

Fitting   On

Art/Supply ✚

Print Service ✚

Misc✚

Subtotal

Discount ✚

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.
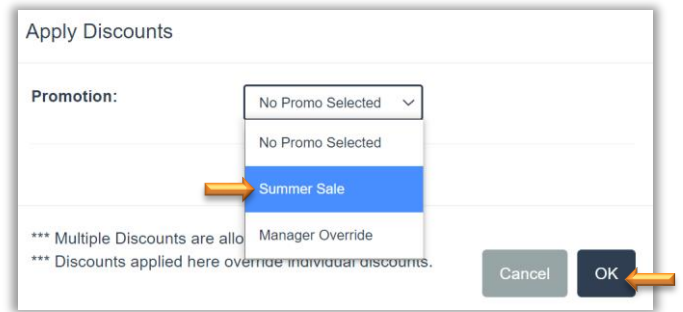
Select Discount Type
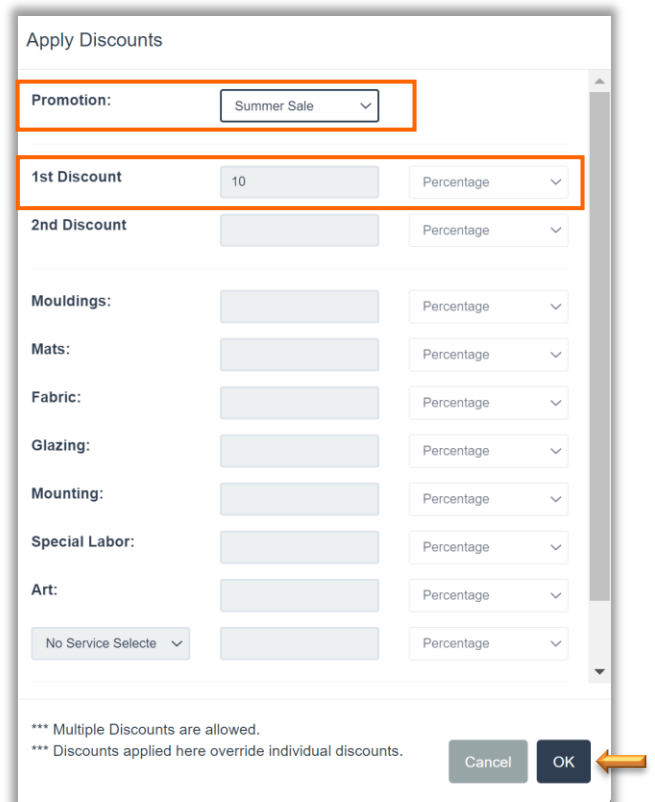
Apply Discount

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.
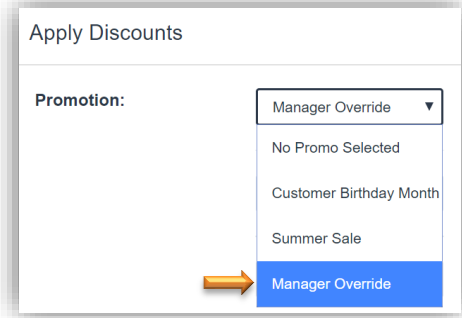
Apply Discount – Mgr. Override
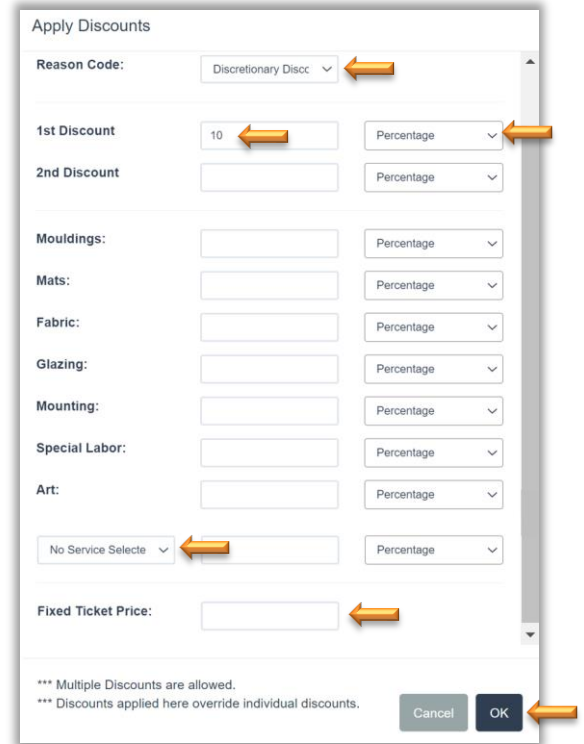
Apply Discount – Mgr. Override – Discretionary Discount
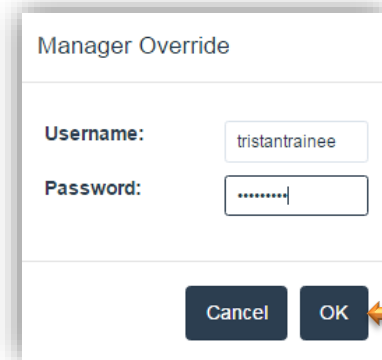
Manager Override Authorization

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

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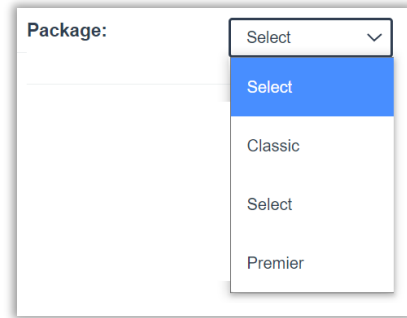
Select Pricing Package

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

- 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.)*

Workorder Totals Column

34. The following four options are available:

- *Add To Invoice*: Touch/Click this button to proceed with the workorder.
- *Clear:* Touch/Click this button to clear workorder screen. You will not be able to recover workorder.
- *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 or the FrameVue App. *See instructions in the FrameVue App section.*

35. Touch/Click *Add to Invoice.*

Completed Workorder Screen

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.

    a. **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.

    b. **Add Item**: Copy Previous Workorder, Art/Gift items, Manual Entry items, Activate Gift Card & Printing Services.

    c.   **Select Customer:** Add New or Existing Customer Profile.

    d. **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.

    e. **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.

    f. **Save:** Save the workorder/invoice and proceed to the payment screen.

    g. **Current Invoice Totals:** Total Price, Total Discount, Subtotal, Total Tax & Grand Total.

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!

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.

Add Inventory Item

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

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.

Invoice Window - Add Manual Item

5. The following line item options are available in the Invoice window.
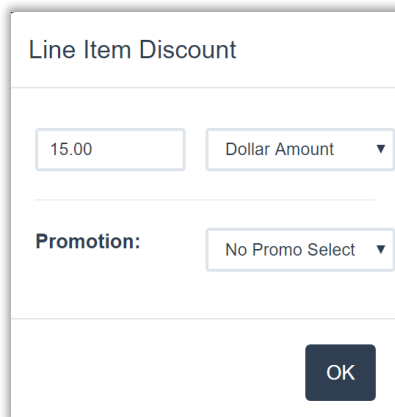
    a. **Tax Exempt:** Touch/Click *Tax Exempt* field located top right to remove tax from the entire invoice.

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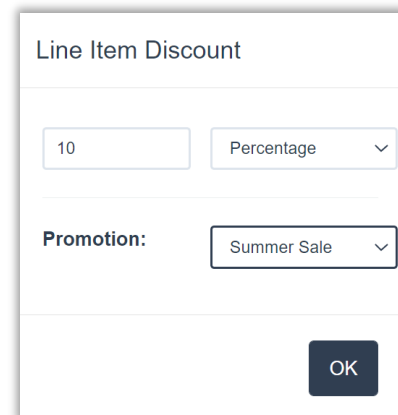
        - *Inventory Items and Manually Entered Item* lines: Touch/Click into *Field to Edit*. The only fields eligible for editing are white in color which are Quantity and Unit Discount.

            o   To add discount. Touch/Click *Unit Discount* field on corresponding line item.The Line Item Discount pop up window will display.
            o   Dollar Discount: *Type Dollar Amount* in to $ field. Touch/Click *OK.*
            o   Percentage Discount: *Type Percentage Amount* in $ field. Touch/Click Dollar Amount *Drop Down Arrow*. Touch/Click *Percentage*. Touch/Click *OK*.
            o   Promotional Discount: Touhc/Click *Promo Drop Down Arrow*. Touch/Click desired *Promotion Type.* Touch/Click *OK*.
            o   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.

Line Item Discount	
15.00	Dollar Amount ▼
Promotion:	No Promo Select ▼
	OK

Dollar Amount Discount

Line Item Discount	
10	Percentage ⌄
Promotion:	Summer Sale ⌄
	OK

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 Condtion/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.*

Deleting Invoice Item

Are you sure you would like to delete this line item from the invoice?

Yes, Delete it   Cancel

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*.
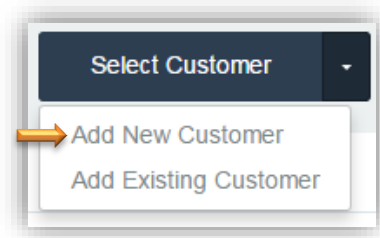
Select Customer Drop Down Menu

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!**

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 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.

View/Edit Customer Profile

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

Invoice Window

9. Touch/Click on the **Save** button to retain the workorder/invoice.
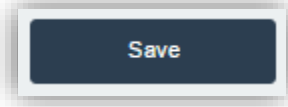
10. The following popup window will appear. Would you like to save this as a Quote or live invoice?
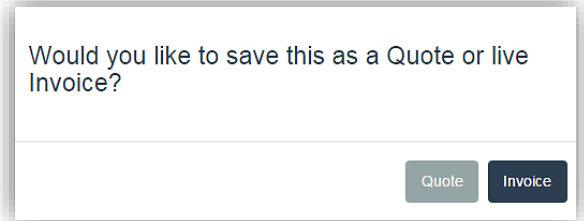
    a. Touch/Click the **Quote button to Save/Hold the Invoice and Print the Quote.**
    b. Touch/Click **Invoice to proceed to the Accept Payment screen.**
    c. **Demo Example Workorder:** *Touch/Click the **Invoice button.***

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.*

    o   **Add Existing Customer:** *The Select/Search Customer window will display.*
    o   **Add New Customer:** *The Add New Customer Window will display.*
    o   **Proceed without Customer:** *The Would you like to take payment on this order prompt will display.*
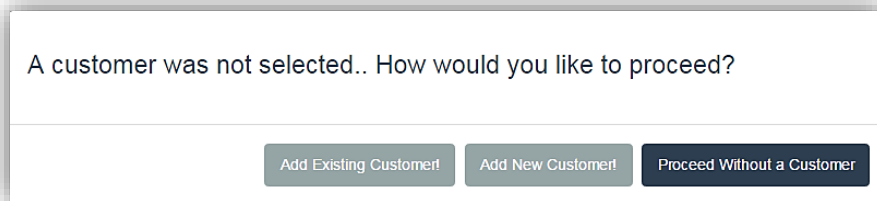
Add/Select Customer Prompt

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.
    b. **Print Workorder.**
    c. **Print All.**
    d. **Take Payment. Yes or Done.** Select **Yes**.
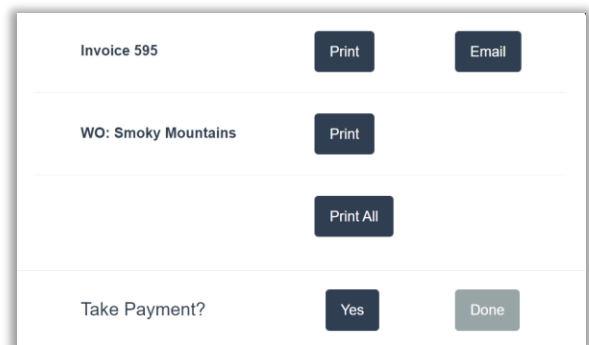
Print Forms & Take Payment

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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.

Accept Payment

    h. ***Pending Payment Field Options***:
- Enter amount to be applied to the invoice

Invoice Details

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

- ***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 #577. 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 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, today's 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

- ***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.*
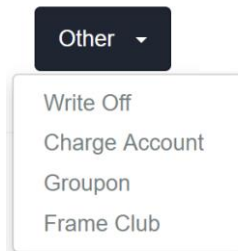
Menu Options:

- *Print Forms*: Print Invoice and Workorder Copies

Payment Types:

- *Cash*
- *Check*

- *Credit/Debit Card*: Visa, MasterCard, American Express & Discover.
- *Mobile Payments:* Apple Pay, Google Wallet, etc. Process under Credit Card button with integrated payment processing.
- *Gift Card:* Redeem your store issued Gift Card with integrated processing and Paya Payment Solutions.
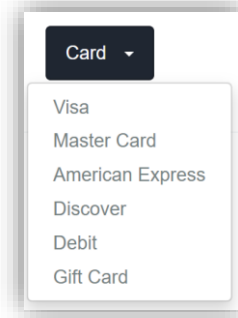
- **Write Off:** Option to write-off an invoice with a balance due. The invoice will no longer show in receivables and the invoice deposit will then become the total sale. amount.
- **Charge Account:** In-house charge accounts.
- **Groupon/Frame Club:** Option must be selected under the Settings tab in the Store Configuration Menu. Enter Coupon/Rewards amount as payment.

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

Accept and Apply Cash Payment

13. Print Options 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.

Print Forms

14. *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.*

15. ***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 willl 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.

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

Print Preview Window - Invoice

17. Touch/Click and **Drag Scroll Bar** downward to view **Workorder Copy** that is located below the invoice copy in the print preview window.
Note: *Demo Example's workorder contains 2 pages.*

Print Preview Window - Workorder

Print Preview Window Zoomed to Display Both the Invoice and Workorder Forms

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

16. After the print begins the program will return to the Print/Status window. This gives you the opportunity to print again in case there are any print errors.Touch/Click the ***Done*** button. 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?
577	Print	Email	Print	Aqua Blue Ready Made Frame 8x10		Delivered	
				Work Order: 529	Print WO:529	Work Orders To Do	Deliver
						Delivered	

Additional Payment   Done
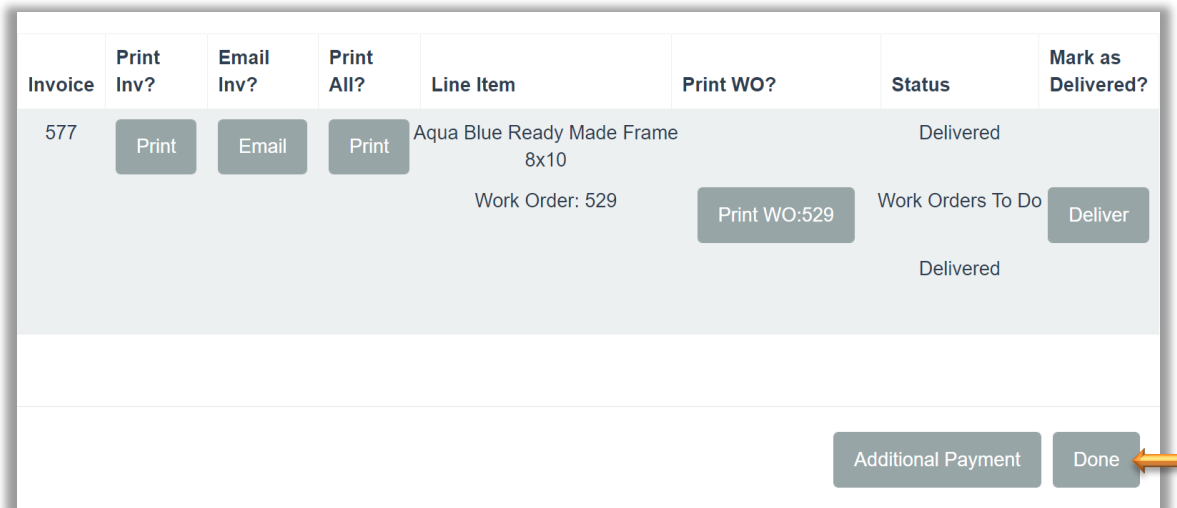
What would you like to print? Pop Up Window

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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
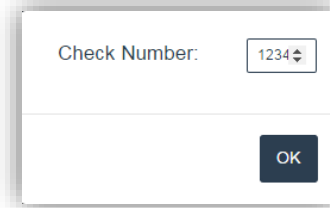
2. **Credit/Debit/Mobile Payment with EVO Integration** (Visa, MC, American Express and Discover)
   - Type payment amount into Pending Payment Field(s).
   - Touch/Click the *Card* button.
   - Touch/Click the *Card Type* in drop down menu.
   - *Note: Any charge type can be selected for mobile payment.*
   - Touch/Click the *Apply Payment* button.
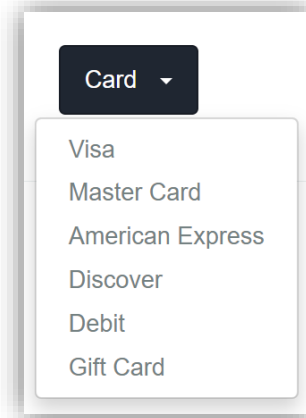
   - LSS Cloud Pop Up Window: *Waiting on Customer Input….*
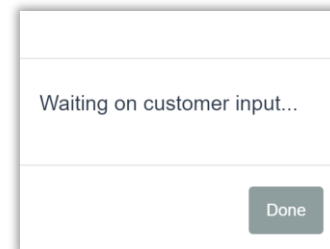
   - Customer will *Insert Credit Card Chip* into the EVO terminal or *Tap Credit Card*.
   - Customer *Removes Credit Card* when prompted by EVO terminal.
   - Customer completes *Signature* on the EVO Terminal screen.
   - Customer Touches *OK* on the EVO Terminal.

- LSS Cloud Pop Up Message: Approved – Touch/Click the **Done** button.
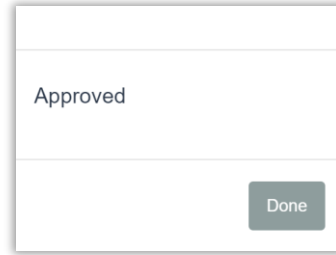
- Credit Card Receipt will **Print** from the EVO Terminal. The first copy is the **Merchant Copy** and contains the customer's signature. The second copy is the **Customer Copy**.

3. **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.
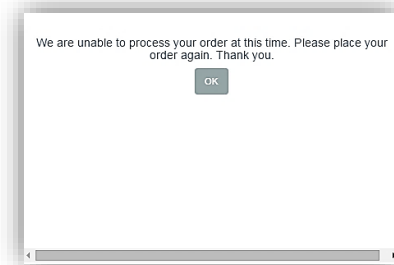
4. **Manual Card Entry**

   - Touch/Click **Manual Card Entry** field under the Credit Card button to select.
   - Touch/Click **Apply Payment** button.
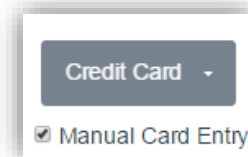
- Touch/Click *Manually Enter Card Number* field.
- Type Number into the Card Number field.
- Touch/Click *Exp Date* field. Type *MMYY* format.
- Touch/Click *CVV* field. Type CVV number.
- Touch/Click *Process* button.

- Authorization – *Approved*: Your transaction has been approved. Thank you. Touch/Click the *OK* button.

- 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.

Credit Card Authorization Window - Declined

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

Remove Declined CC Payment

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

- **Gift Card:** Go to Redeem Gift Card section for instructions.

5. **Other Payments:** Touch/Click the *Other* button on the Accept Payment Screen to access the below form of payments.
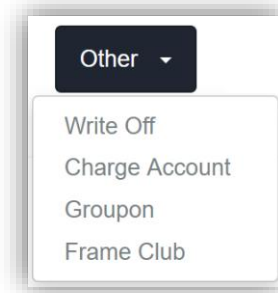
- **Write Off:** Option to write-off an invoice with a balance due. The invoice will no longer show in receivables and the invoice deposit will then become the total sale. amount.

  o Type payment *Amount* into Pending Payment Field(s).
  o Touch/Click *Othe*r button.
  o Touch/Click *Write Off*.
  o Touch/Click *Apply Payment* button.

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

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

- **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.*

6. **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.*

- Touch/Click **Payment Type** button. ***Demo Example:*** *Check*

- Type **Check #** in the field. Touch/Click **OK**.

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

- Print Invoice/Workorder. Payment Details will print on Invoice. See Demo Example Image below.

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

1. Write up first workorder. Do <u>not</u> Add to Invoice.

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.

4. 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.*

5. Touch/Click **Description** field, remove 1 and add **2.**

6. Touch/Click the drop down arrow on the 2nd mat field. Touch/Click the **Delete** option to remove.

7. Touch/Click the **Add to Invoice** button to add the 2nd workorder to the invoice.

8. 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.

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

Invoice Window

9. Proceed with the invoice.

Process a payment on an invoice with a 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 136* - Touch/Click **Search** button.

Invoice Search

Invoice #	Revision	Customer Name	Date Created	Balance				
202	1	Gladys Glazing	1/18/2017	$0.00		Refund	Edit	Print ▾
199	1	Gladys Glazing	1/12/2017	$0.00		Refund	Edit	Print ▾
169	1	Gladys Glazing	10/16/2016	$0.00		Refund	Edit	Print ▾
136	1	Gladys Glazing	9/2/2016	$604.59	Pay	Refund	Edit	Print ▾

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 customer has 4 invoices listed. Invoice 202, 199 and 169 has $0.00 balance due. Invoice 136 has a $604.59 balance due. Select Invoice 136 by Touching/Clicking the **Pay** button to continue to the Accept Payment Screen.

5. The customer's Payment History will list at the bottom of the screen: The customer has previously made a $50.00 payment on the invoice.

6. Touch/Click the *Pending Payment* field and enter *Payment Amount*. *Demo Example*: *$50.00 - Cash*

7. Touch/Click *Payment Type* – Touch/Click *Apply Payment(s).*

    Note: Refer to Write Order for processing payment type instructions.

8. The Print Invoice/Workorder window will display.

    - Touch/Click *Print* button under the Print Invoice? heading for customer payment receipt.
    - Touch/Click *Print WO* button to print a copy of the Workorder if needed.
    - Touch/Click *Done* button when print process is complete.

    Note: Refer to Write Order for print invoice/workorder instructions.

Accept Payment

Customer: Gladys Glazing

Invoice #	Subtotal	Tax	Discount	Total	Payments Made	Balance	Pending Payment				
136	$612.53	$42.06	$63.06	$654.59	$50.00	$604.59	50.00	Details	Pay All	Pay Half	

Outstanding Balance (All Invoices) $554.59

Pending Payments

Remove	2	Invoice(s):136	Cash	5/24/2017	$50.00	✳

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

Payment History

Refund	1	Invoice(s):136	Cash	5/24/2017	$50.00	✓

Process Payment with Balance Due

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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.
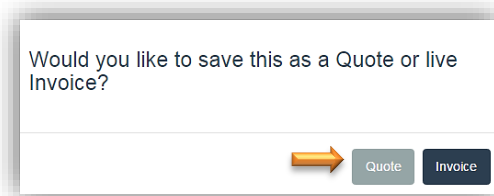
Select Quote

5. Type the **Quote Description** in the field. **Demo Example:***Marriott Quote*

6. Touch/Click **OK** button.
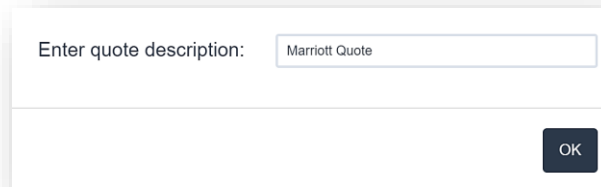
Quote Description

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.
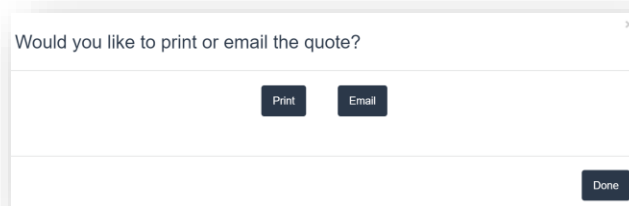
Quote – Print or Email

8. 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 Receipt -Total Amount Only

Quote Receipt -Component Totals and Total Amount

Resume Quote

1. Touch/Click the **Quote** button on the main menu.

2. 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.

Quote List

3. The invoice/workorder will resume.

   Note: The due will update when you resume the 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.

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.
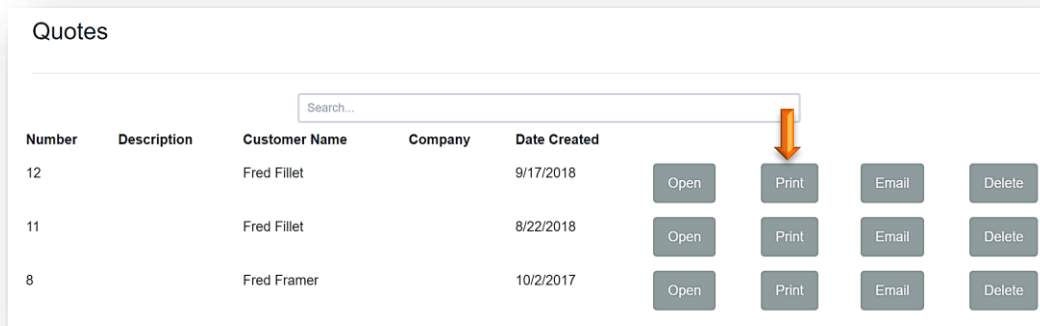
7. Touch/Click *Send* button.

Quote - Email

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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.

Quotes

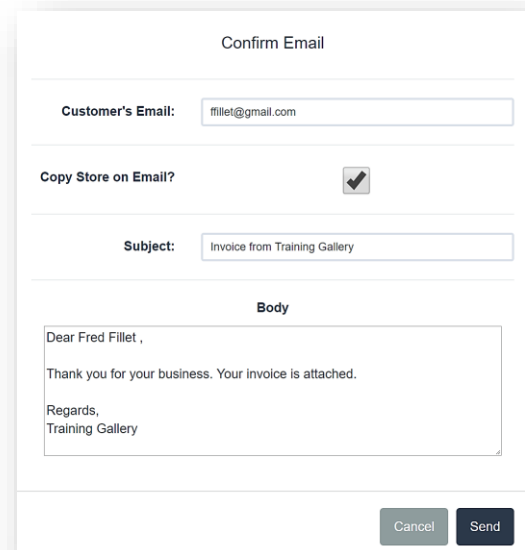| Number	Description	Customer Name	Company	Date Created				
12		Fred Fillet		9/17/2018	Open	Print	Email	Delete
11		Fred Fillet		8/22/2018	Open	Print	Email	Delete
8		Fred Framer		10/2/2017	Open	Print	Email	Delete

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.

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***
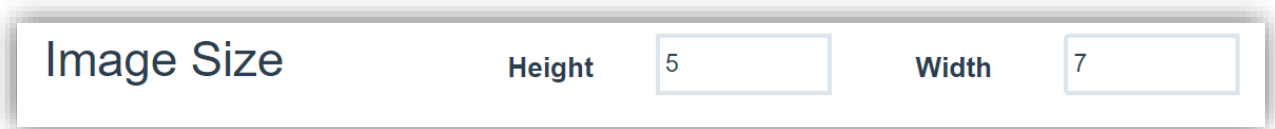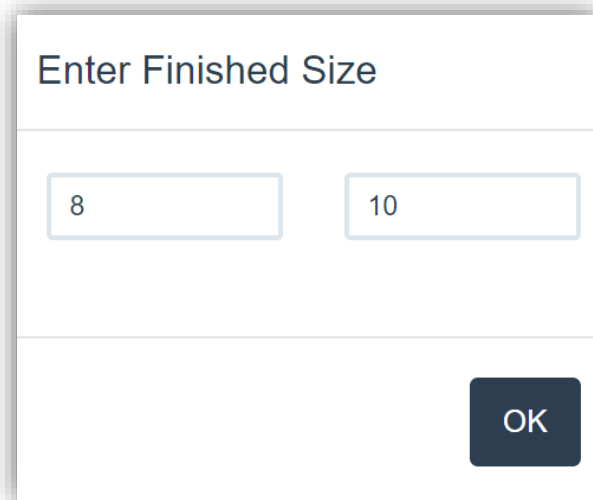
3. Touch/Click on ***Finished Size Icon***.
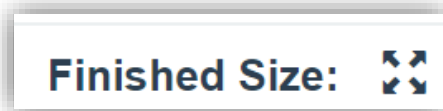
4. Enter Finished Size: ***8x10***. Touch/Click ***OK***.

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

| Mats | Top | 1 1/2 | Bottom | 1 1/2 | Left | 1 1/2 | Right | 1 1/2 |

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

| Mats | Top | 1 1/2 | Bottom | 1 1/2 | Left | 1 1/2 | Right | 1 1/2 |

Mats / Fillets / Fabrics   **1:**   C1000

7. Touch/Click **No Glazing**.

No Glazing
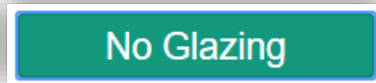
8. Fit to Frame Workorder Screen Image Below.

Description   Fit to Frame | Art Condition | Art Type | **Due Date:**
9/28/2017

Image Size   **Height**   5   **Width**   7   **Finished Size:**
8 X 10

Mouldings   **1:**

Mats   **Top**   1 1/2   **Bottom**   1 1/2   **Left**   1 1/2   **Right**   1 1/2

Mats / Fillets / Fabrics   **1:**   C1000

2:   **Reveal**   1/4

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

9. Proceed with 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.

   | Add Work Order ▾ |
   | Copy Previous Work Order |

   OR

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

   | Add Item | | Previous Work Order |
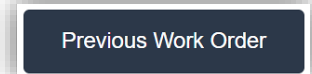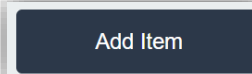
4. Search for workorder by **Name, Phone # or Workorder #**. **Demo Example:** *Last Name Glazing*

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

Search Work Orders

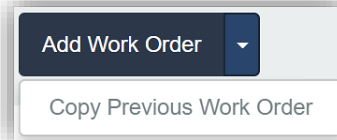| #	Customer Name	Work Order Description	Date Created	
315	Gladys Glazing	The Italian Villa	1/23/2018	Select
308	Gladys Glazing	Mountains in Autumn	11/24/2017	Select
273	Gladys Glazing	The Italian Villa	5/30/2017	Select
254	Gladys Glazing	The Italian Villa	1/9/2017	Select
241	Gladys Glazing	The Italian Villa	1/25/2017	Select
228	Gladys Glazing	Vase of Red Roses	12/26/2016	Select
227	Gladys Glazing	Vase of Red Roses	12/26/2016	Select
209	Gladys Glazing	kl;fhkh;fl	10/24/2016	Select
176	Gladys Glazing	Italian Villa	9/9/2016	Select

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.

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.

Edit Workorder Options

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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.

View Invoice/Workorder

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

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. Peform an Edit with Price Lock if you do not want the workorder amount to increase or decrease.

Invoice Payment Alert

This invoice has been paid in full. Are you sure you would like to edit this invoice? Pricing could change.

Yes   No
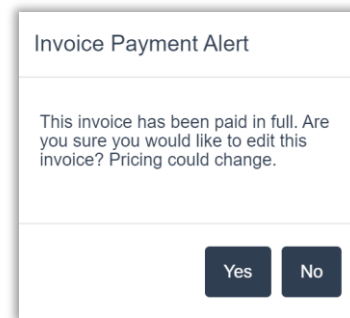
Invoice Payment Alert

6. How to **Edit Workorder**

   a. **Image Size and Mat Reveals:**

   - 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.

   b. **Mouldings:**

		• Touch/Click **Field Arrow** and select one of the following:

- • Touch/Click **Field Arrow** and select one of the following:
- • **Edit** - To change Mat Item Number
- • **Delete** – To remove Moulding Item Number

c.   **Mats:**

- • **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.

e.   **Specials, Mounting Stretching:**

- • Highlight/Backspace to **Remove current quantity.**
- • Type **New Quantity.**

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

f.   **Discount +**:

- • Type **New Amount/Type**.
- • Touch/Click **OK**.

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 Quanitity** 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.

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 proceed to the **Accept Payment** screen to process the refund.

   a. Type **Amount** due in the payment pending field.
      Note: Do not insert a negative sign or use the Pay All button you will receive an error.
   b. Select **Form of Payment** for refund.
   c. Touch/Click the **Print Forms** button to print the revised invoice and workorder.

Accept Payment – Type Refund Amount

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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 <u>not</u> 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 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 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**.

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

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.

Refund Invoice Search

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

Refund

5. Full Refund: Touch/Click the *OK* button to refund the full amount.

   Partial Refund: Touch/Click *Refund Amount* field. *Backspace Current Amount* listed. Type *New Amount*. Touch/Click the *OK* button.

Refund Amount: 374.50

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	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)
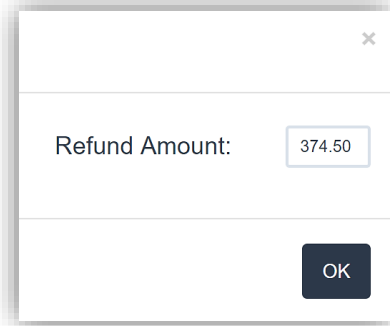
Payment History

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

Refund: Cash

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

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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.

Search /Void Invoice

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

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.

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.

Payment Section on Invoice Copy

Sell and Redeem custom printed gift cards from you store. Requirements: EVO Merchant Processing, Dejavoo Merchant Processing Machine and Gift Cards from Paya. To sign up for EVO. Click on the link: "Click Here To Learn More About EVO Payments!" located in the Store Configuration main menu under the Credit Card Processor tab. To sign up for Paya Gift Cards. Click on the link "Click Here To Sign Up!" under the Gift Cards main menu button.
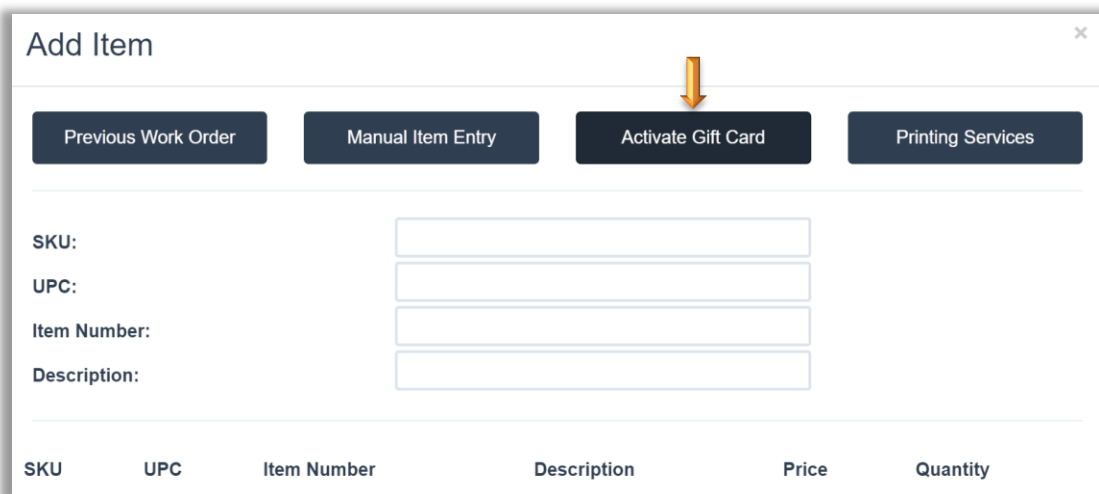
Sell/Activate/Reload

The gift card is actvated/reloaded/sold as an item in the invoice window.

1. Touch/Click the **Write Order** button on the main menu.

2. Touch/Click the Invoice Icon located in the top blue bar to the right.
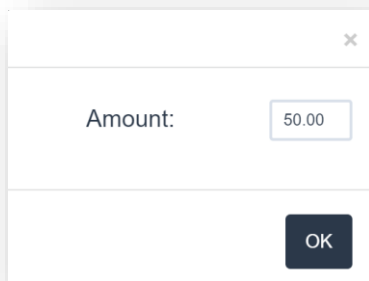
3. Touch/Click the **Add Item** button in the invoice window.

4. Touch/Click the **Activate Gift Card** button in the Add Item Window. To Reload a Gift Card. Touch/Click the drop down arrow.

Add Item Window - Activate/Reload Gift Card
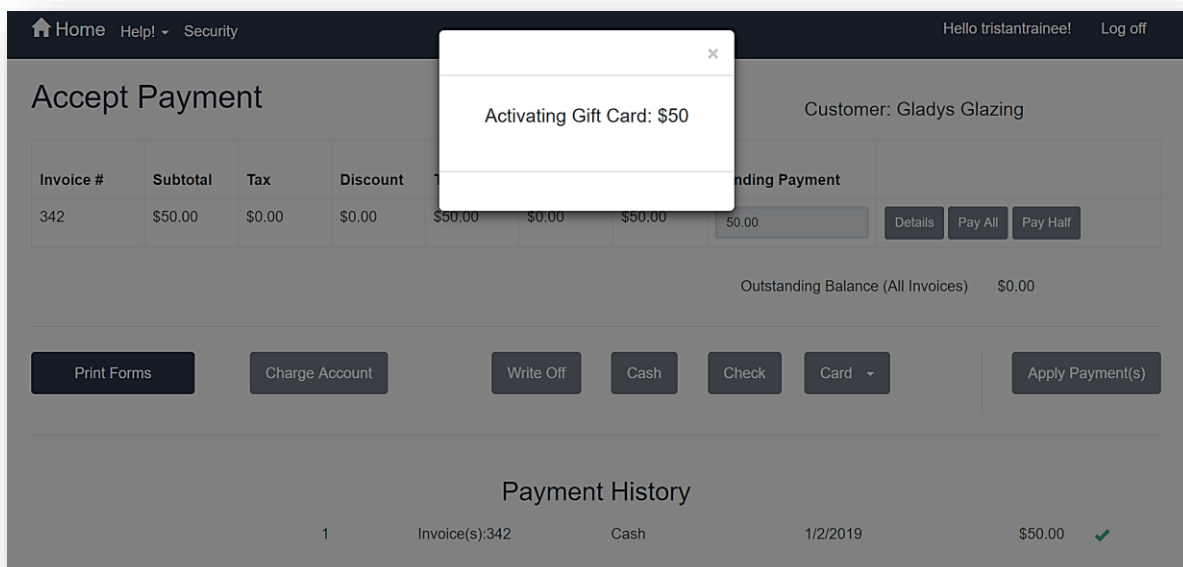
5. Type the *Amount* of the gift card. Touch/Click *OK* button.

Gift Card Amount

6. Select Customer. Save to invoice. Take Payment. Apply Payment. Print Receipts.

7. The Activate Gift Card window displays. *Swipe Gift Card* through the Dejavoo Merchant Processing machine.

Activate Gift Card

If there is a problem activating or reloading a gift card during the normal invoice sales transaction follow the below steps. The Reload ad Activate New buttons process the same.

1. Touch/Click the **Gift Card** main menu button.

2. Touch/Click the **Activate New** for new gift card or **Reload** button to add additional funds button.
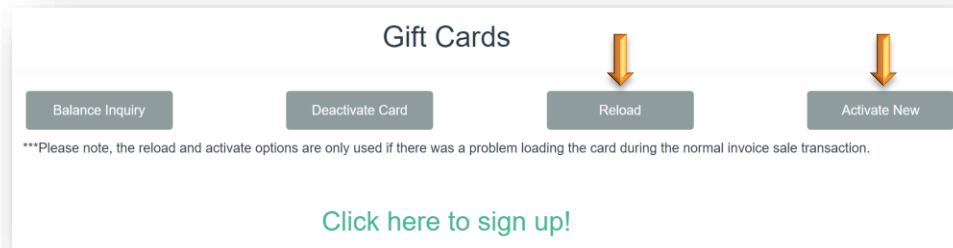
Gift Card Menu Options

3. The Gift Card Activation window displays.
   a. Type in the **Gift Card Amount**.
   b. Touch/Click on the Register drop down arrow. Touch/Click **Register Name/ID.**
   c. If you would like a customer and merchant receipt, leave **Both** selected. Receipt options: Both, Merchant, Customer and No.
   d. Touch/Click the **OK** button.
   e. **Swipe Gift Card** through the Dejavoo Merchant Processing machine to activate the gift card.

Activate Gift Card Window

1. Apply Payment Screen. Touch/Click **_Card drop down arrow_**. Touch/Click **_Gift Card_**.

Form of Payment - Gift Card

2. Touch/Click **_Apply Payment_** button

3. **_Swipe Gift Card_** through the Dejavoo Merchant Processing machine.

Gift Card Payment Received

1. Touch/Click the *Gift Card* button on the main menu screen.

2. Touch/Click the *Balance Inquiry* button.

3. Touch/Click on the Register drop down arrow. Touch/Click *Register Name/ID*.

4. If you would like a customer and merchant receipt, leave **Both** selected. Receipt options: Both, Merchant, Customer and No.

5. Touch/Click *Check Balance* button.

Check Gift Card Balance

6. *Swipe Gift Card* through the Dejavoo Merchant Processing machine.

Deactivate Card

1. Touch/Click the *Gift Card* main menu button.

2. Touch/Click the **Deactivate Card** button.

3. Touch/Click on the Register drop down arrow. Touch/Click *Register Name/ID.*

4. If you would like a customer and merchant receipt, leave **Both** selected. Receipt options: Both, Merchant, Customer and No.

5. Touch/Click the *Deactivate* button.

6. **Swipe Gift Card** through the Dejavoo Merchant Processing Machine.

Deactivate Gift Card Window

Add Purchase Order Number to the Invoice

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

Invoice Window – Add Purchase Order Number

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

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
                                                           Holly Springs, GA 30142
346
                                                           tristan@gmail.com
Revision: 1   770-123-5678
PO #: 123456 ⬅
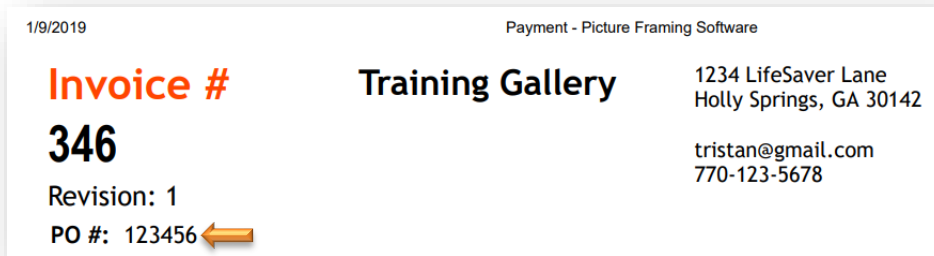
Invoice Receipt – PO Number

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?
347	Print	Email	Print	Work Order: 363	Print WO:363	Custom	Deliver
							Done
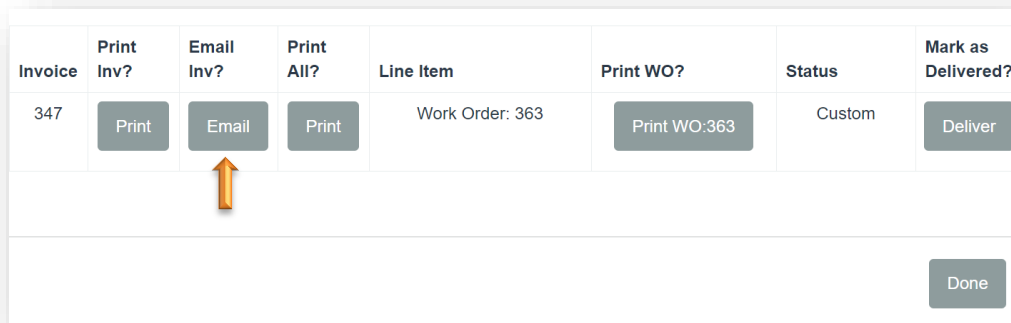
Write Order/Invoice Print Window

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.

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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**. **Demo Example:** *Invoice 344*

      Note: *All Invoices will display that contain the search data.*

4. The invoice line item displays the following information: Invoice #, Revision #, Customer Name, Balance, Workorder Description, Production Status and Cut Mat ID.

Invoice Search

3. The following line options are available:

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

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

   c. **Print:** Touch/Click the Print drop down arrow.

- o Touch/Click Invoice, Work Order Description or Print All to Print invoice and or workorder.

- o Print All Mobile is for use on tablets when a printer is unavaliable. The invoice and workorder forms will open in a new tab on your tablet browser. The weblink can be emailed.
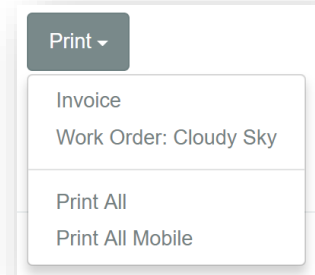
   e. **Other**: Touch/Click drop down arrow to access menu options.
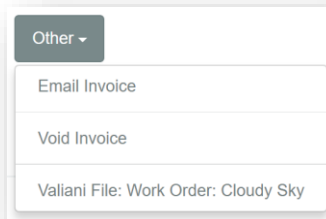
- o **Email Invoice**
  Customer's email address will auto fill if their email address has been captured in their customer profile. If not, touch/click Customer's Email field. Type customer's *Email Address*.

- o **"Copy Store on Email"** is auto selected. To de-select. Touch/Click *Check* field.

- o **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.

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

- o Touch/Click *Send* button.

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

- o **Valiani or Wizard File**: See Computerized Mat Cutter Section for instructions.

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

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.
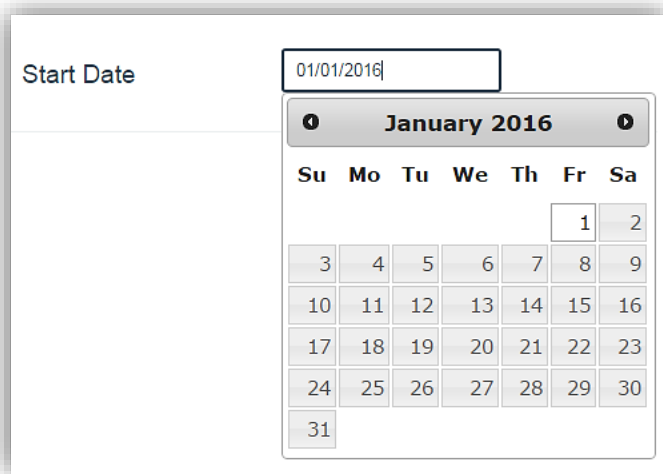
Default Production Menu

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.

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 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.

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.

Invoice Line Items

Description	SKU	Status	Call Status	
Italian Villa	175	In Progress ▼	Not Called ▼	Save
		On Order		
		In Progress		
		On Hold		
Shipping Charge		Void		Save
		Delivered		
		Assembled		
Aqua Blue Ready Made Frame 8x10	B1234	In Progress ▼		Save

OK

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:

   a. Not Called
   b. Called, No Answer
   c. Second Call, No Answer
   d. Third Call, No Answer
   e. Called. Left Message

   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.

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.

1. **Activate New Production Menu**

   a. Touch/Click the *Store Configuration* button.

   b. Touch/Click the *Settings* tab.

   c. Touch/Click *Use New Production Screen* field to Select.

   d. Touch/Click *Save.*

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

      <div style="float:right">Production NEW!</div>

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.*

   a. Touch/Click *Production New* button on the main menu.

   b. Touch/Click the **Manage Status** button.

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".

Production Status List

Work Orders To Do   [Create]

Active Status List

***Drag the status list into the order in which your business operates.

OnOrder	Manage
InProgress	Manage
Assembled	Manage
Delivered	Manage
OnHold	Manage
Void	Manage

Not Active Status List

Customer Notification	Manage
Deleted	Manage
FullRefund	Manage
Moved	Manage
PartialRefund	Manage
Returned	Manage
Sold	Manage

Create New Production Menu

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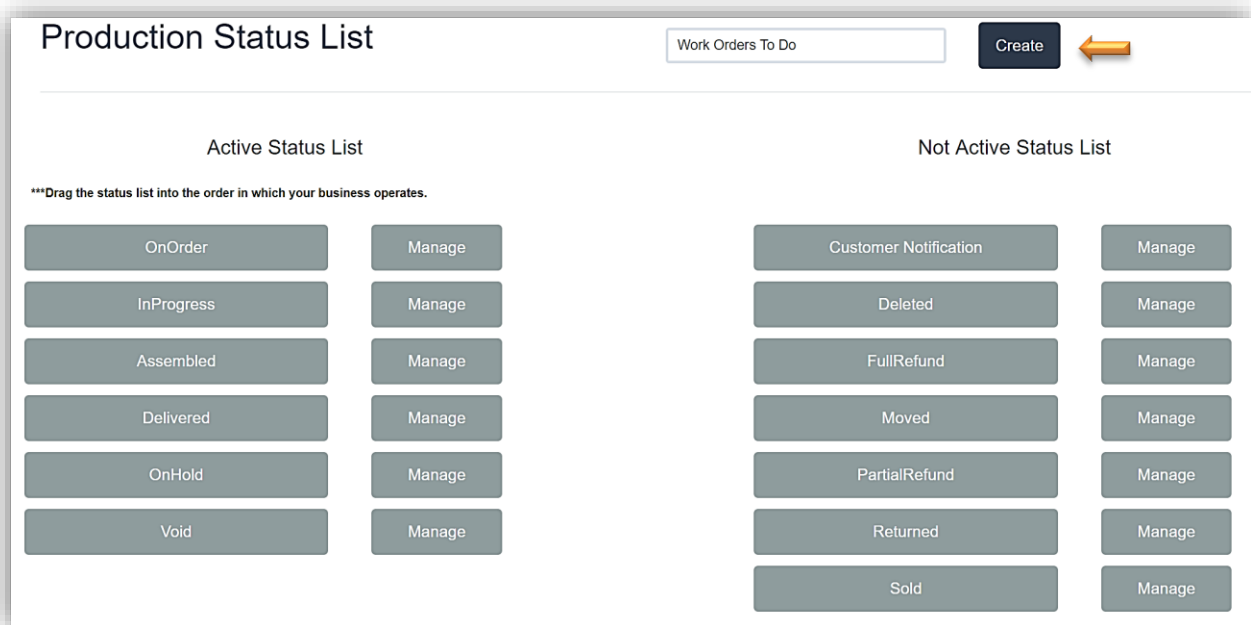
c. Touch/Click the *Create* button.

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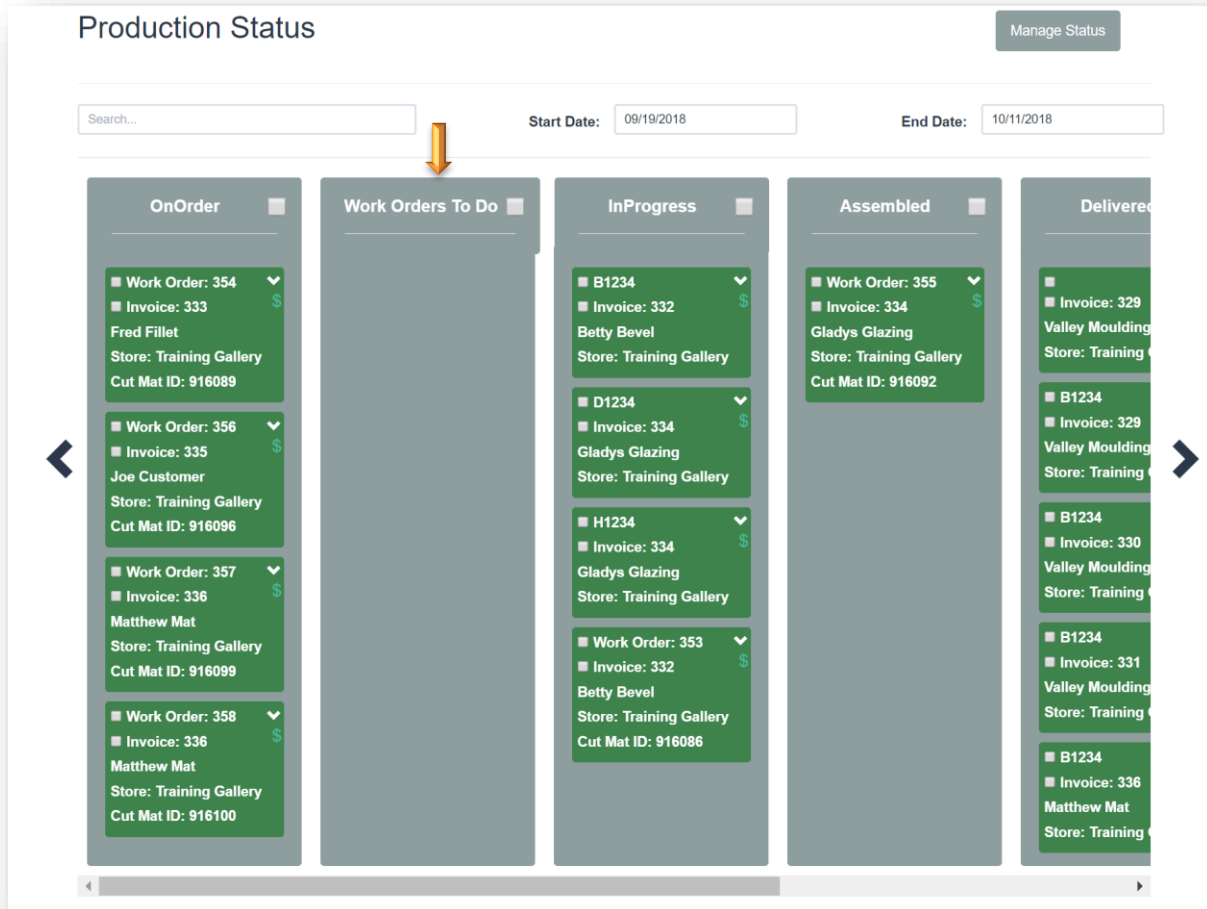
Create New Production Status

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.

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.*
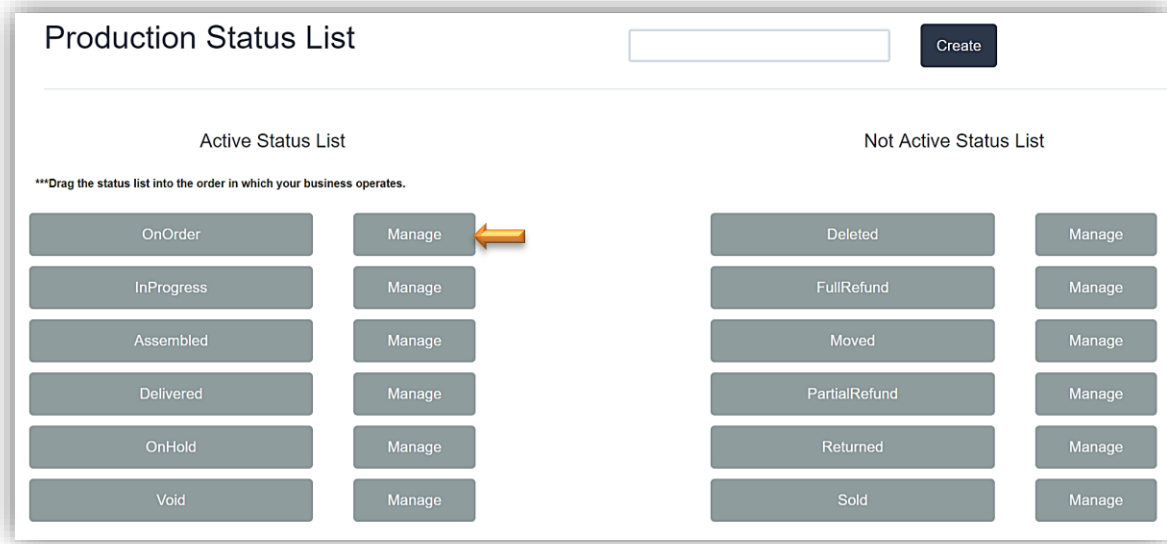
Manage Production Statues

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.
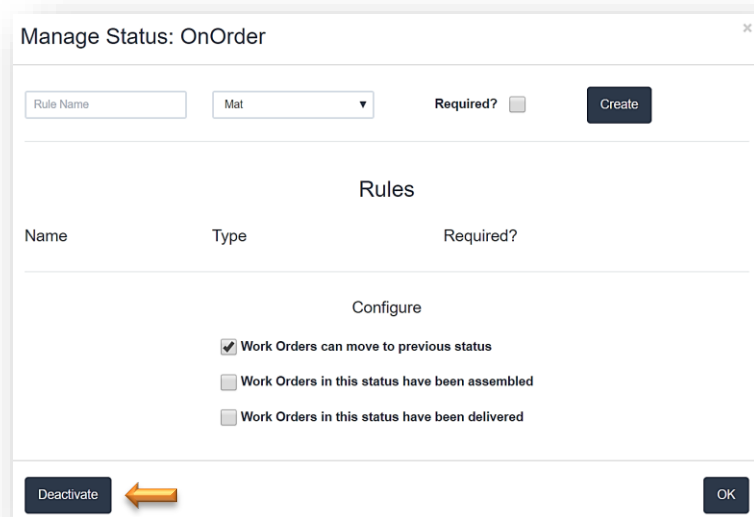
Deactivate On Order Production Status

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.

Warning ✕

There are invoices still attached to this status. Please move those invoices to another status before deactivating. You may need to adjust the date range to see them all.

OK
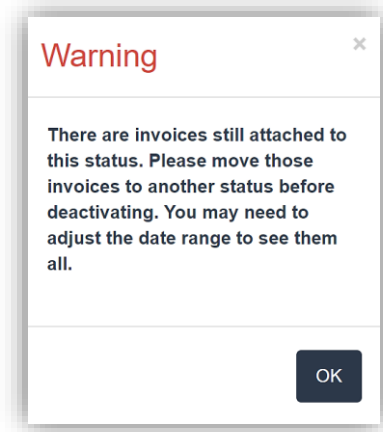
5. <u>**Arrange Active Status Order**</u>

   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. <u>**Set Status Configure Options**</u>

   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 avaiable.

   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 occured:
   • 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 Production Status:

7. **Add Status Type Production Rule.** Create a rule that the user has to acknowlege 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.

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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.

Manage Status: Work Orders To Do

| Rule Name | Fit ▼ | Required? ✔ | Create |

Rules

Name	Type	Required?	
Double Check Measurements	Fit	✔	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 |
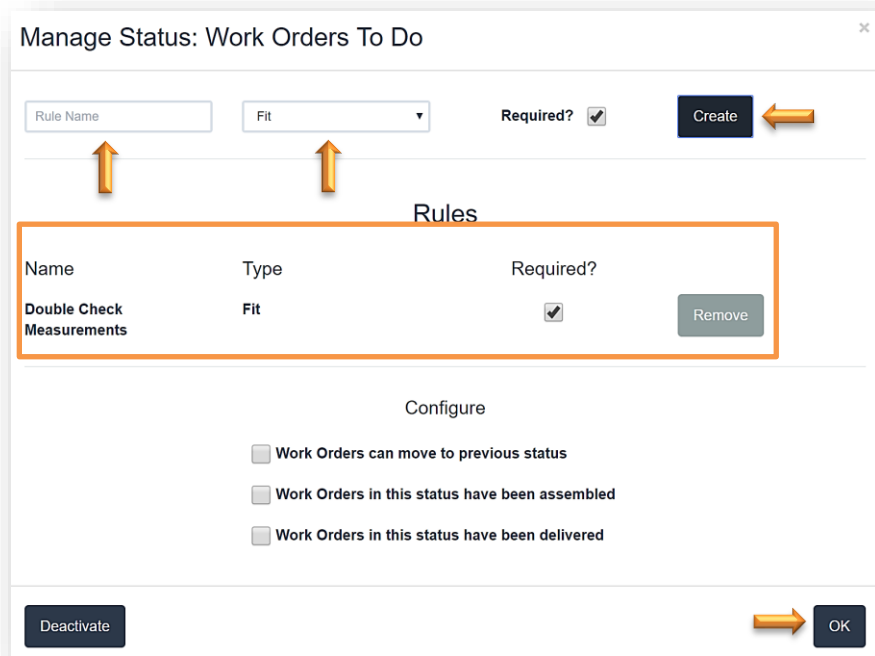
Create Status Production Rule

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.*

☐ **Work Order: 354** ∨ $
☐ **Invoice: 333**
Fred Fillet
Store: Training Gallery
Cut Mat ID: 916089
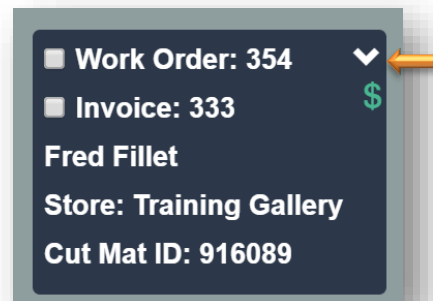
c. The Production Rules window will open for the selected work order and will list the rule(s) that are required in order to move the status in the production process. Touch/Click the **Done** field to confirm receipt. Touch/Click the **OK** button to save.

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.

Remove Production Rule and or Requirement

Production Set-Up is Complete!

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 < > Arrow**s. 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**.

Production Status Navigation – Scroll Horizontally

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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.
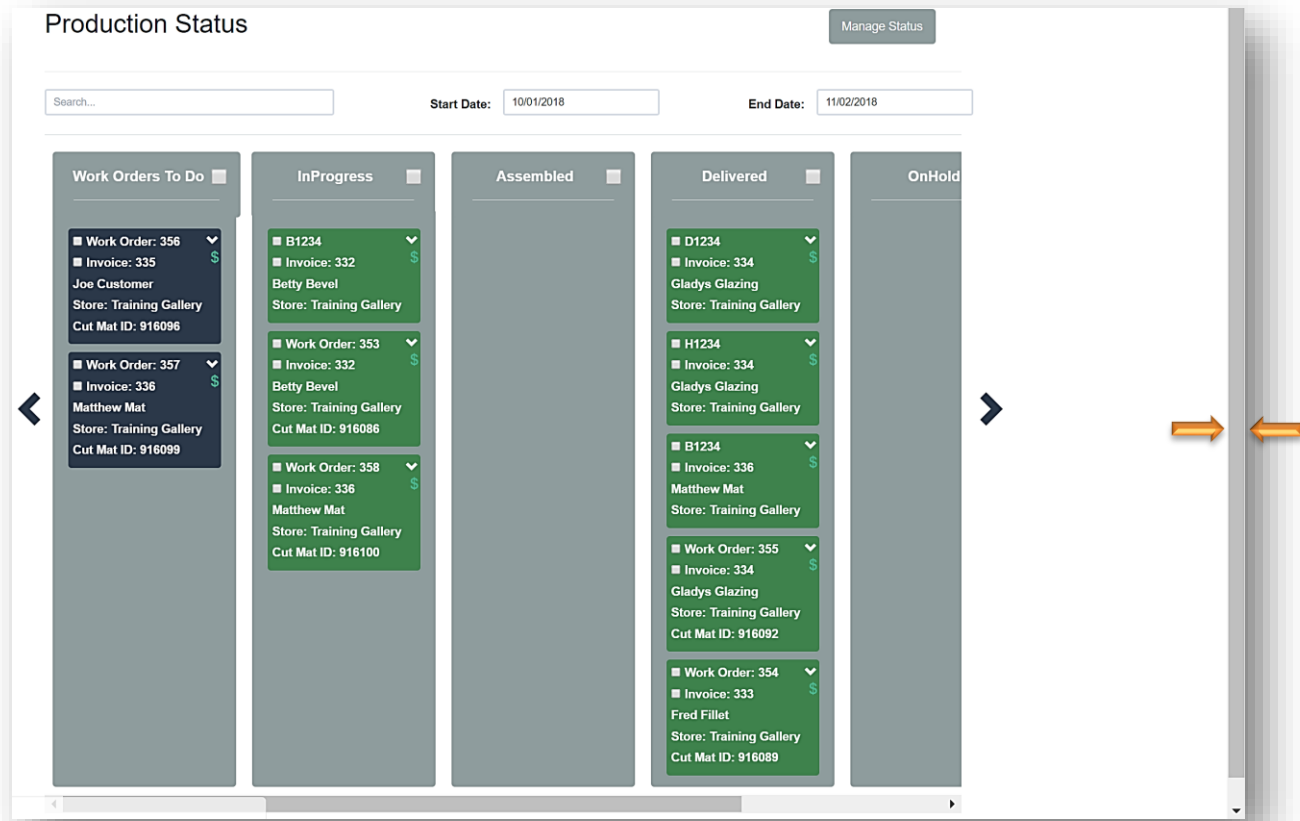
Production Status Navigation – Scroll Vertically

1. *The main screen will display the last 2 weeks workorders/invoices catergorize 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.

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.*

> Work Order: 354
> Invoice: 333 $
> Fred Fillet
> Store: Training Gallery
> Cut Mat ID: 916089
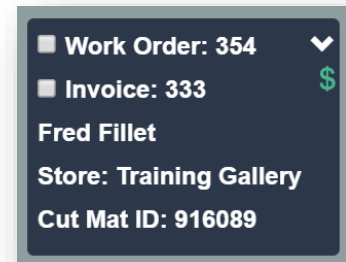
d. Inventory Item Blocks

- 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.

> B1234
> Invoice: 332 $
> Betty Bevel
> Store: Training Gallery
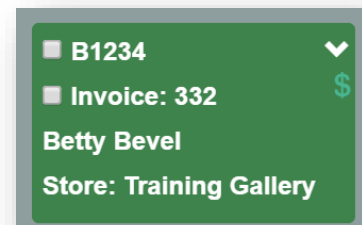
2. **Update Workorder to In Progress Status**: Touch/Click & Drag Workorder block from Work Orders To Do Status column to *In Progress Status* column. ***Demo Example:*** *Workorder 354.*

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.
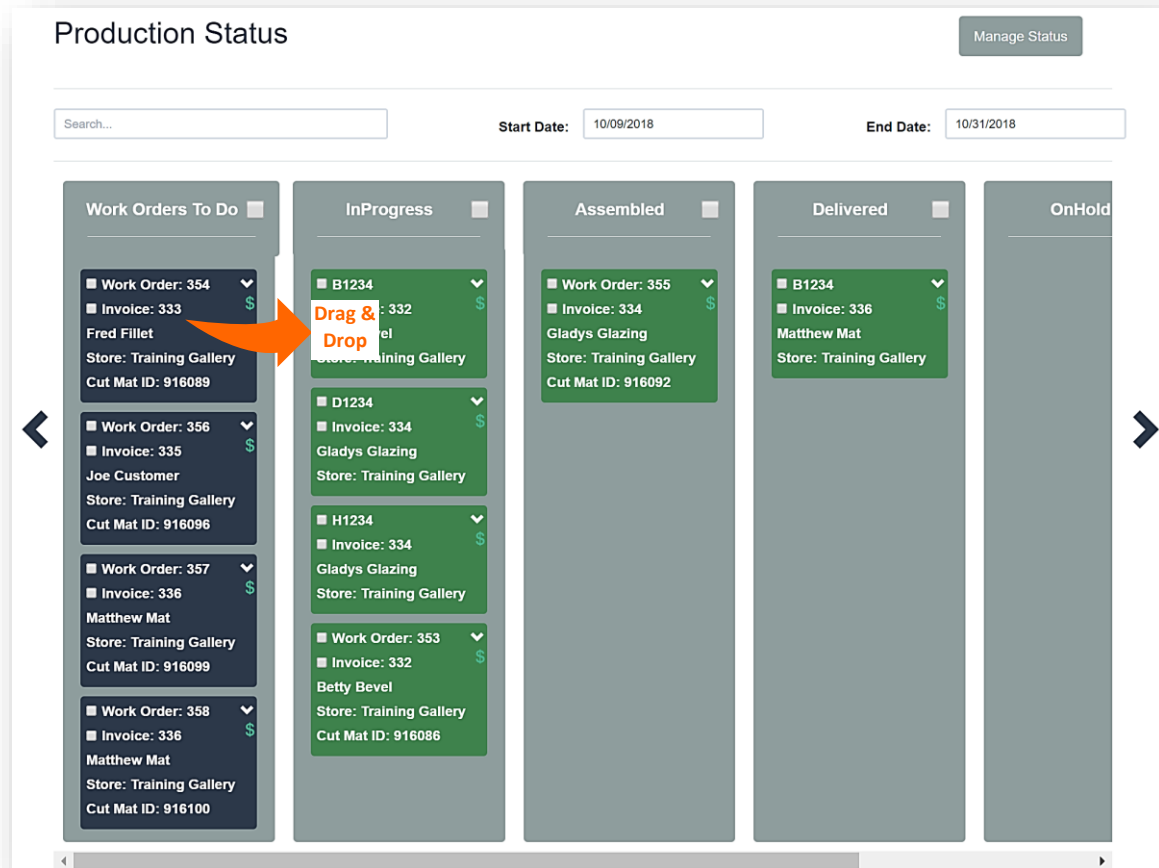
Production Status: Workorders to Do to In Progress Status

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*
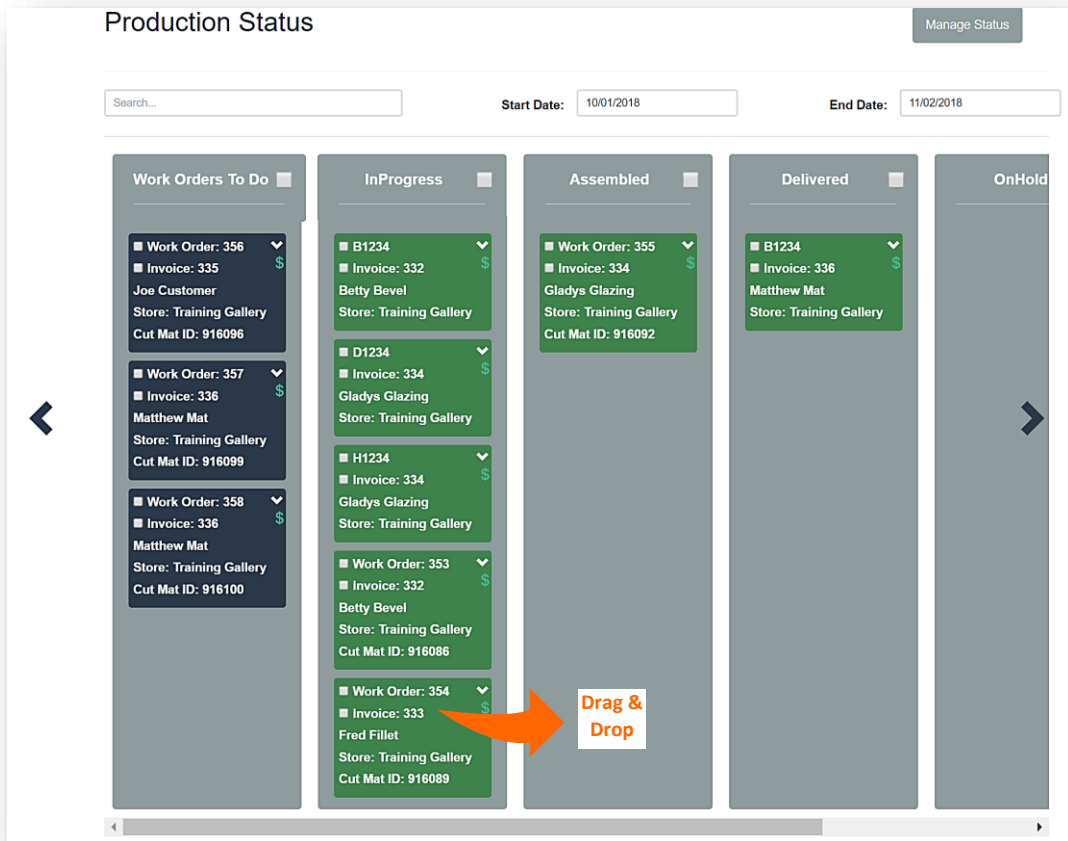
Production Status – In Progress to Assembled Status

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.*
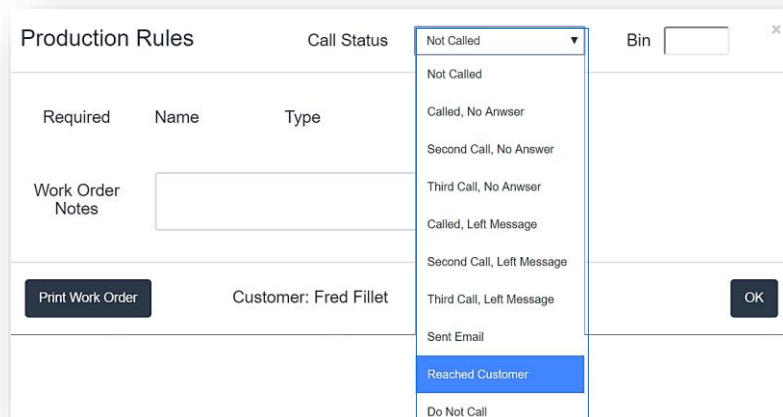
Production Rule – Select Customer Call Status

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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.***

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 multple workorders on one invoice can only be delivered at the same time in the Store Configuration menu under the Settings tab.*

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 <u>all</u> 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 <u>selected</u> 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.
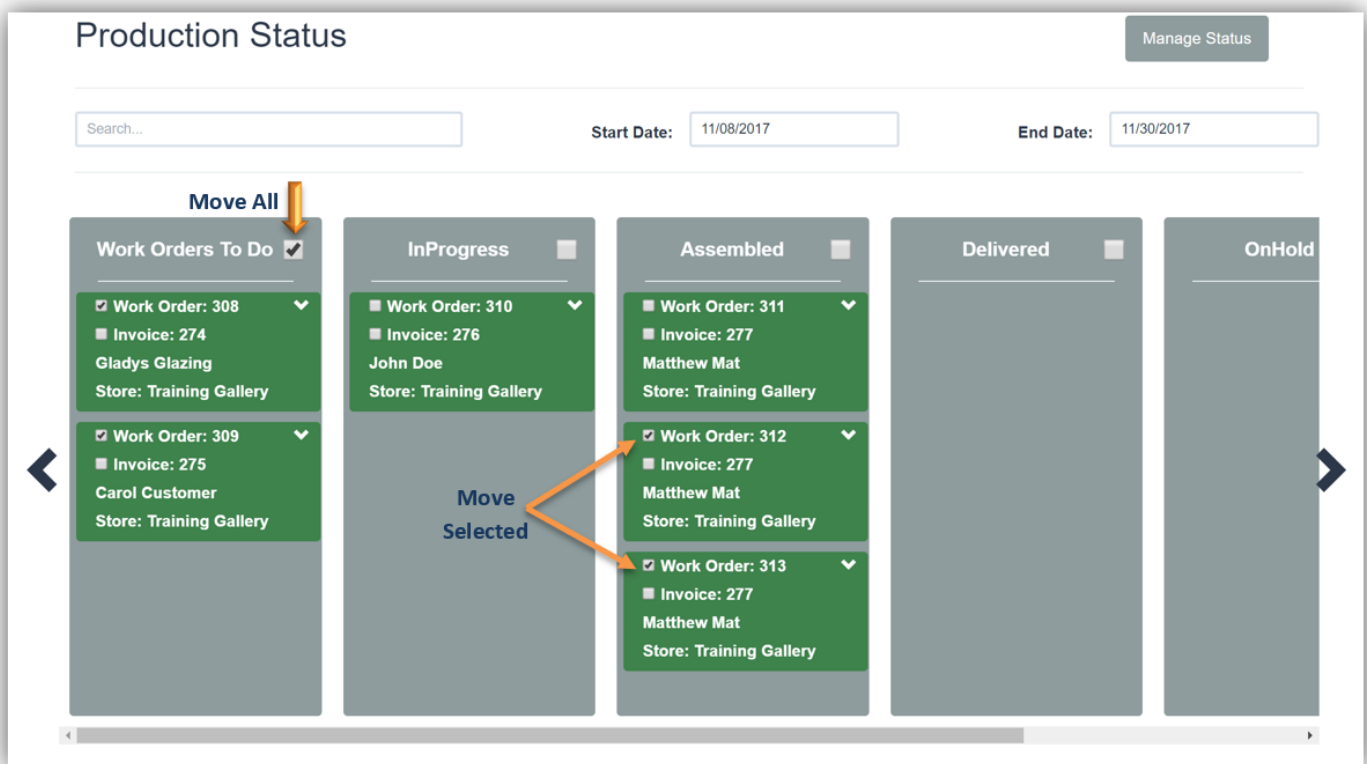
Production Status – Designate To Move All or Selected Workorders To Next Status
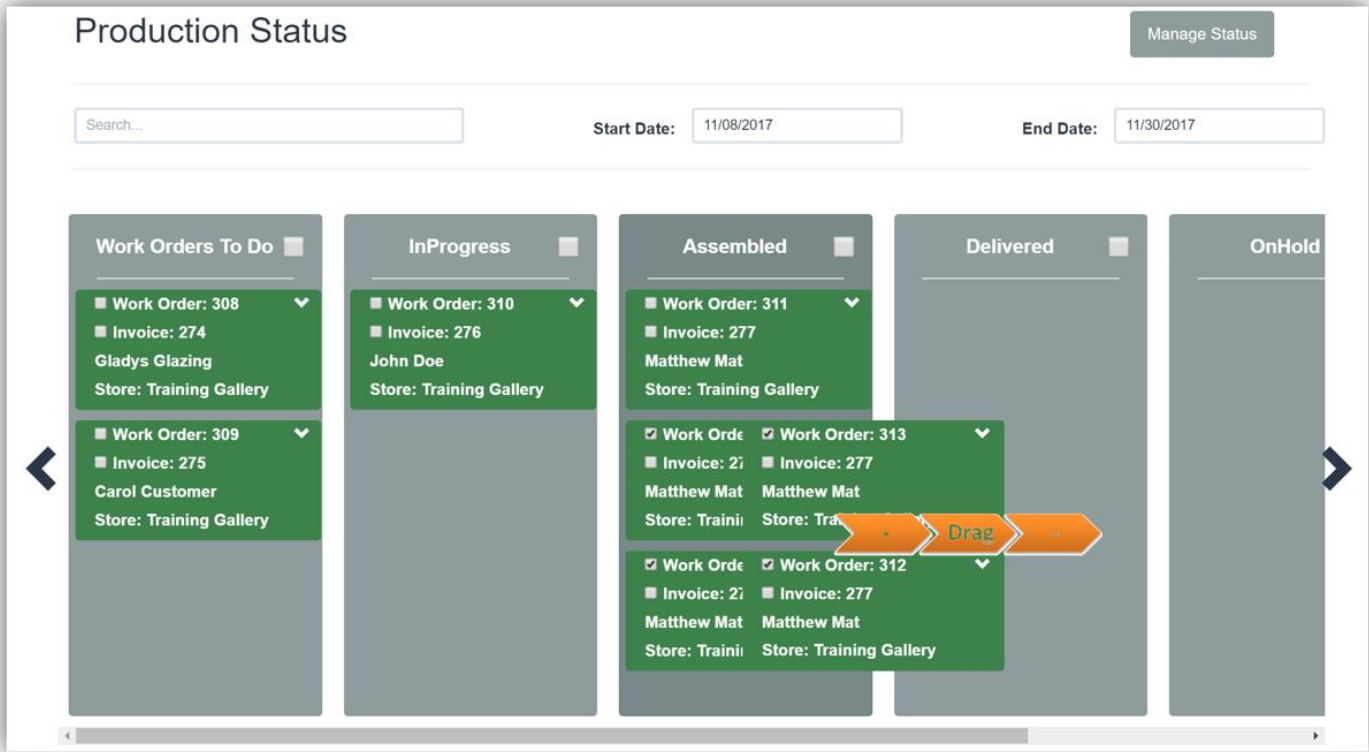
Production Status – Touch/Click & Drag Selected Workorders To Next Status

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.*
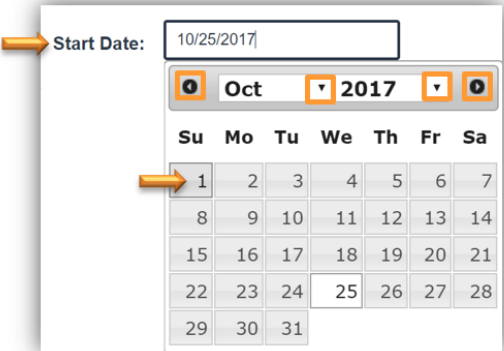
Production Status – Select New Date Range

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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.*
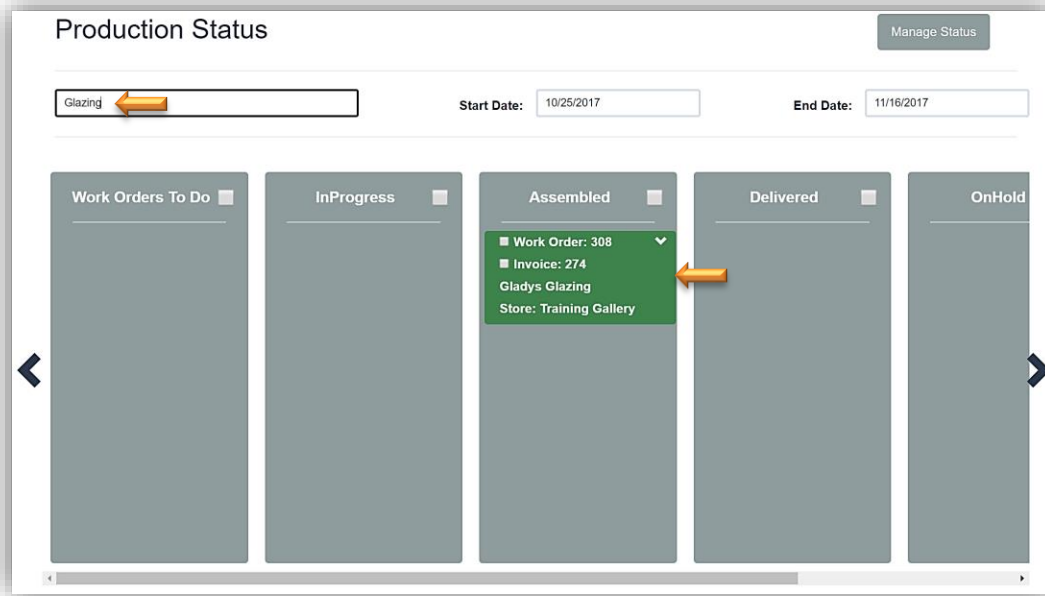
Production Status - Search

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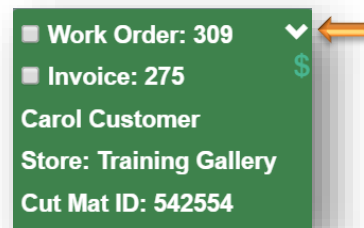
7. **Call Status**: See Call Status instructions under number 10: Production Status.

Production Status Options

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.

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.

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

Customer Database - Search: Fred Fillet

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.

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

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

Invoice 402 (Revision 1)

☐ **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	☐	☑
2	1	WO# 399	Fall Day	$909.84	$0.00	$0.00	$909.84	$973.53	☐	☑
3	1		Shipping	20	0	$0.00	$20.00	$21.40	☐	☑

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.

Customer Database – Open – View Only Workorder/Invoice

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 - Edit Customer Profile

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

Customer Database – Edit Customer Profile

b. Touch/Click the *Save* button.

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.

Customer Database - Delete Customer Profile

Delete Customer

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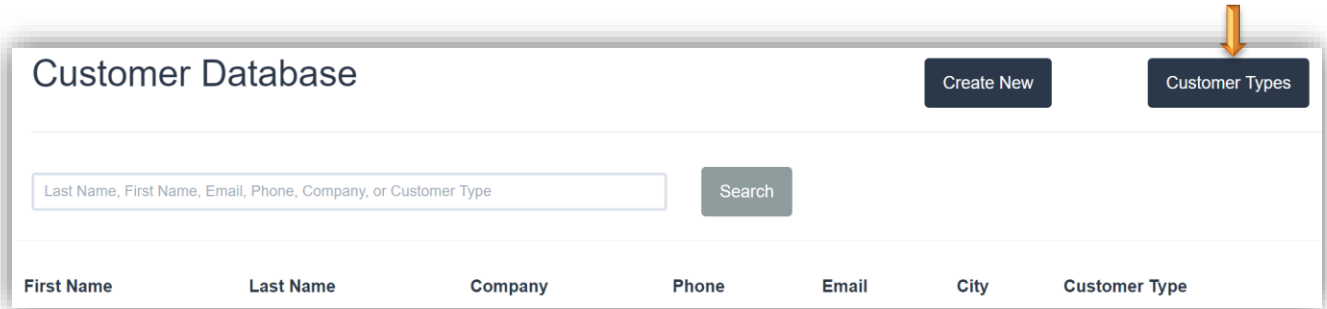
***You cannot delete a customer that has invoices

177
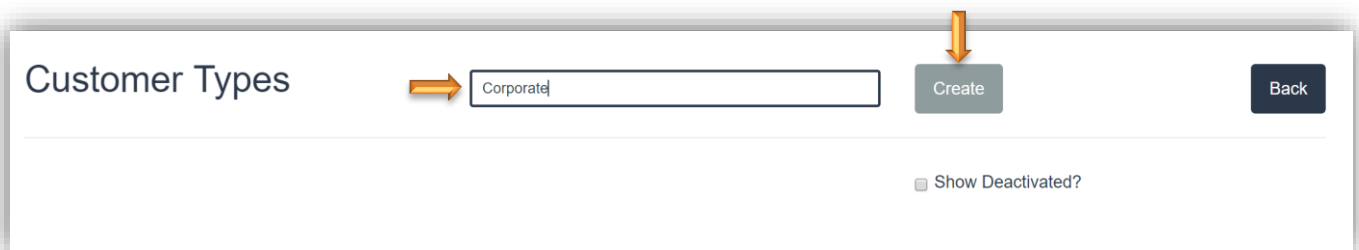
Add customer types such as : Corporate, Interior Designer, Artist, etc.

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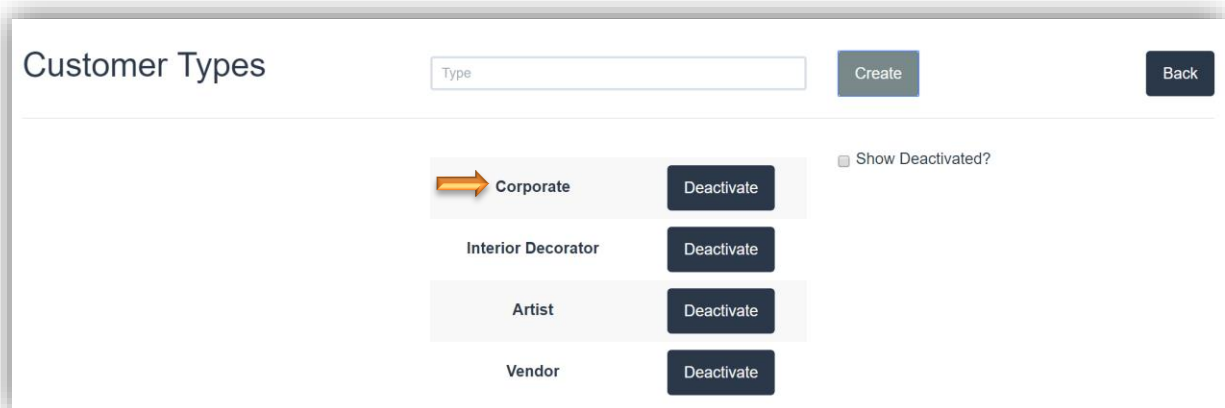
1. Touch/Click **Customer Database** on the Main Menu. Touch/Click **Customer Types** button located in the upper right corner screen.

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

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

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.
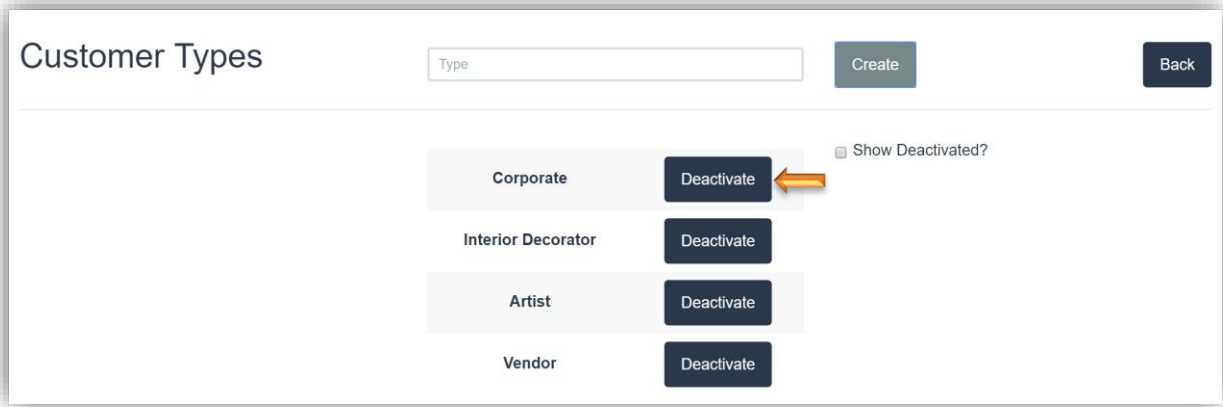
2. Activate:
   a. Touch/Click Show **Deactivated Field Box**.
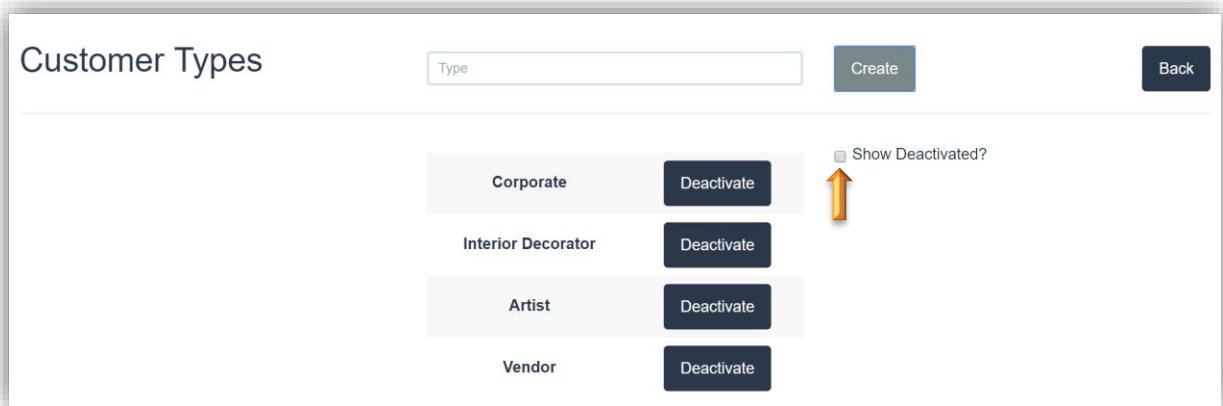
   b. The Deactivated Customer Type will display in the list. Touch/Click the **Activate** button on the appropriate line item.

<u>*Path:*</u> *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 Range: | ⦿True◯False | | Start Date: 5/1/2021 | 🗓 | End Date: 5/17/2021 | 🗓 | View |
| Include these invoices: | Invoice: 596 - 05/17/2021 - Total: 6 ⌄ | | Print: Statement of Account ⌄ | | | | |

|◁ ‹ 1 of 1 › ▷| ↻ ⊖ Page Width ⌄ 💾⌄ 🖶 ⬚ Find | Next

Page 1 of 1

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

Statement of Account
May 17, 2021

Customer:

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

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

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.

Packing List

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.
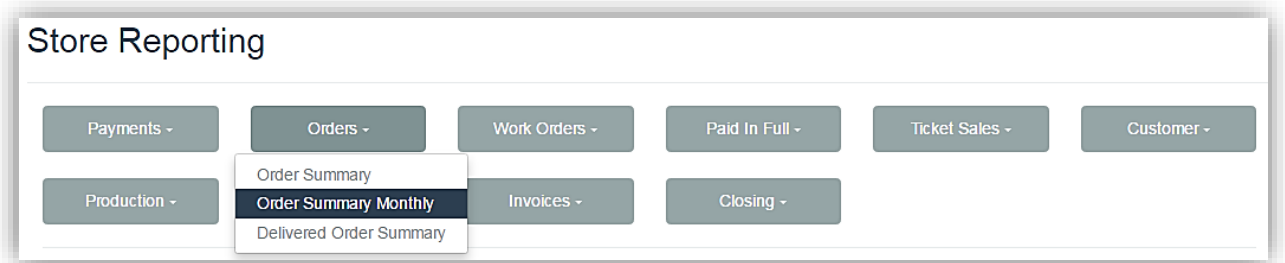
Store Reporting - Select Report

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.
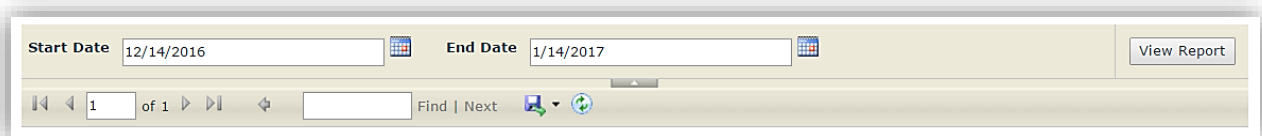
Report Tool Bar – Will vary depending on report type.

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.
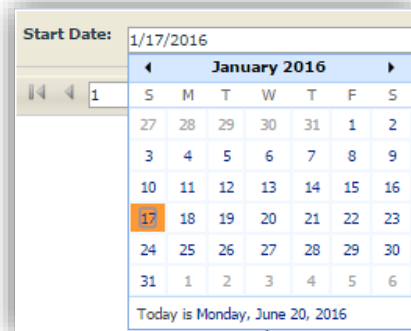
   b. **Select Month/Year**: Touch/Click Month drop down arrow. Touch/Click *Month*. – Touch/Click Year drop down arrow. Touch/Click *Year*.
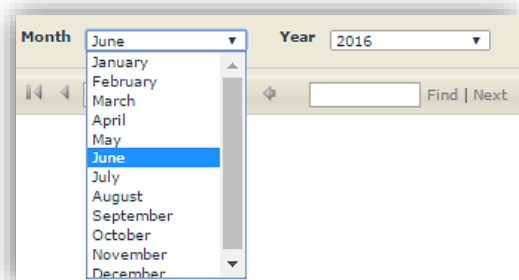
5. **Process the Report:** Touch/Click the *View Report* button or the *Refresh* button. The report will display on the screen.

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*.
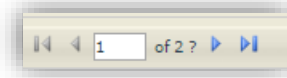
8. **Search:** Find Text in the report. Touch/Click *Search* field. Type *Word/Number* into the field. Touch/Click *Find*. Touch/Click *Next* to move to the following place the word/number appears in the document.
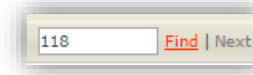
9. **Export Report**: Touch/Click the *Export Icon* drop down arrow. Touch/Click the *Application/File Type* that you would like to use for the export. *Save Report* once it has opened in the application/file location you selected. The report can now be *Printed* or *Emailed.*
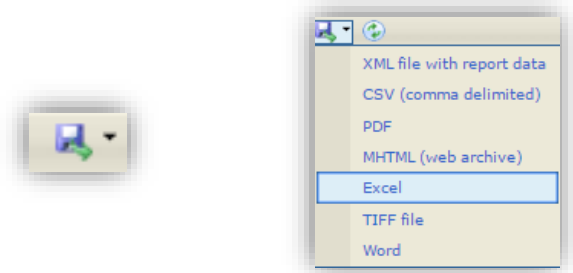
10. **Print:** The following reports now include a Print button: Delivered, Undelivered, Salesperson, Production Log and all Material Usage Reports.

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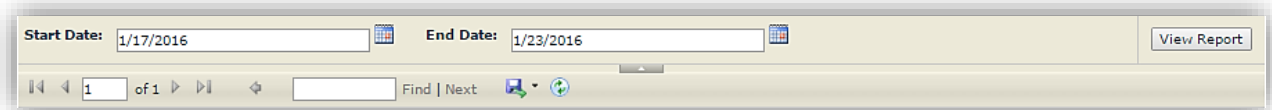
Reports Tool Bar

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

Payment Reports

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 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.

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 ***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.

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.

Order Summary Monthly: *Displays the orders received for the Month and Year selected. Report categories by day/date/month: Date, Labor, Material, Subtotal, Tax and Total Amounts.*

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 | |

Orders Received Summary Report

Run on: 6/21/2016 1:46:28 PM

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	6/18/2017		**End Date**	6/24/2017			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	Materia
6/21/2017	76	Bill Bevel	⊟ 2	[Expand to View]	Tristan Trainee	$36.72	$640.0
				243	Tristan Trainee	$36.72	$640.0
	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	$804.53
	201	Bill Bevel	⊞ 1	[Expand to View]	Tristan Trainee	$0.00	$25.00
	202	Gladys Glazing	⊞ 1	[Expand to View]	Tristan Trainee	$55.57	$855.03
	203	Fanny Frame	⊞ 1	[Expand to View]	Tristan Trainee	$32.56	$467.00
	204	Fred Fillet	⊞ 1	[Expand to View]	Tristan Trainee	$74.10	$659.94
	205	Wally Wall	⊞ 1	[Expand to View]	Tristan Trainee	$105.15	$827.2
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.

Print								

Start Date 1/1/2017   **End Date** 1/28/2017   View Report

◀◀ ◀ 1 of 1 ▶ ▶▶   ⬦   Find | Next

Undelivered Order Summary Report
Training Gallery

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**

Work Orders ▾

Work Order List

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 7 days.

2. Edit Default Dates: Touch/Click **Start/End date calendar icons** to edit date range. Touch/Click **Refresh** button to process new date selections.

3. Report Options

   a. **Sort:** Touch/Click the Report Headings to **Sort by Ascending/Descending** order.

   b. **Print Workorder:** Touch/Click on the 📋 to 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.

	Start Date	4/1/2016	🗓	End Date	4/30/2016	🗓		Refresh		
Invoice	WorkOrde	LineItemN	Customer	Title	Status	SalesPrice	Discount	Order Date	Due Date	Framing Order Id
111	137.1	2	Fred Fillet	Home on the Hill	Delivered	971.18	97.12	4/8/2016	4/15/2016	4176
113	139.1	2	Fanny Frame	Italian Villa	Delivered	1096.51	0	4/11/2016	4/18/2016	4197
117	142.1	1	Fred Fillet	The Blue Vase	InProgress	1061.51	106.15	4/16/2016	4/25/2016	4327
118	143.1	2	Fanny Frame	kkjkh	InProgress	1255.29	125.53	4/16/2016	4/25/2016	4329
119	144.1	2	Pablo Picasso	watercolor boat	Delivered	445.64	0	4/16/2016	4/25/2016	4330
120	149.2	2	Betty Bevel	Italian Villa	InProgress	736.44	73.64	4/27/2016	5/2/2016	4505
121	146.1	1	Unassigned Unassigned	Beach Sunset	InProgress	393.16	0	4/27/2016	5/4/2016	4497

Paid In Full ▾

Paid In Full
Paid In Full Monthly

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	$808.01	$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

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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
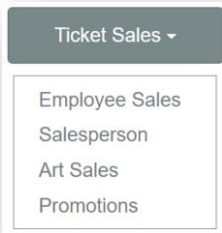
Employee Sales Report: *Displays charts for % Total Framing Dollar Amount by Employees for the time period selected. (Defaults to the last 7 days.) Lists the following; Salesperson, Year, Month, Order Date, Invoice Total, Workorder Total, Number of Revisions, Workorder Quantity, Total Retail Amount-Average 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 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 are names 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.
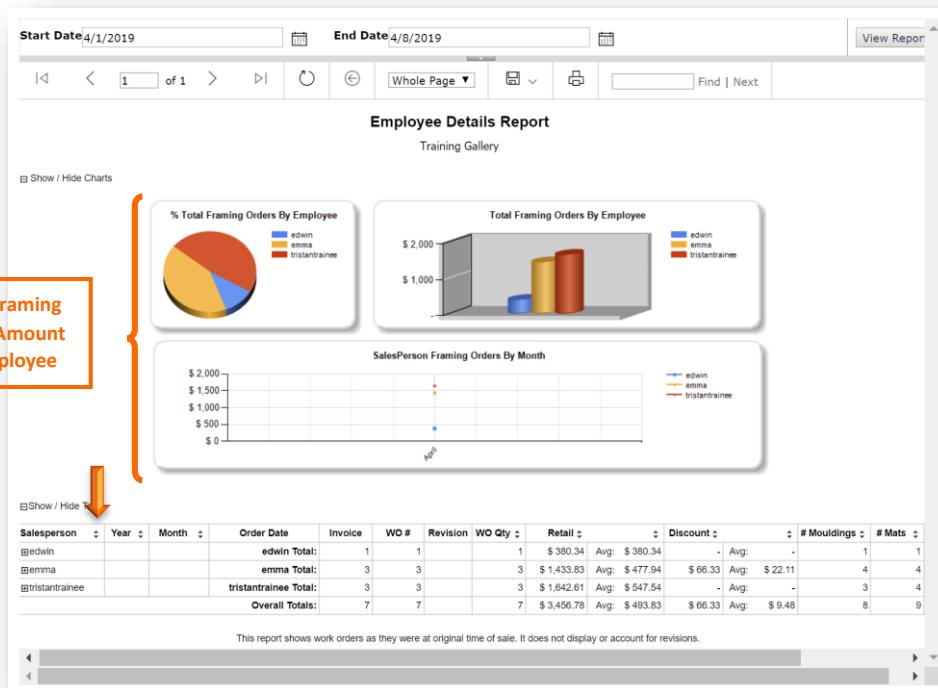
Salesperson Report: *Lists selected salespeople's productivity statistics with or without invoice detail for the time period selected. The **Without Invoice Detail** report displays: Salesperson Name – Total Sales – New Order Count (Number of Workorders) – Average Order Sales Amount for each salesperson 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)**.
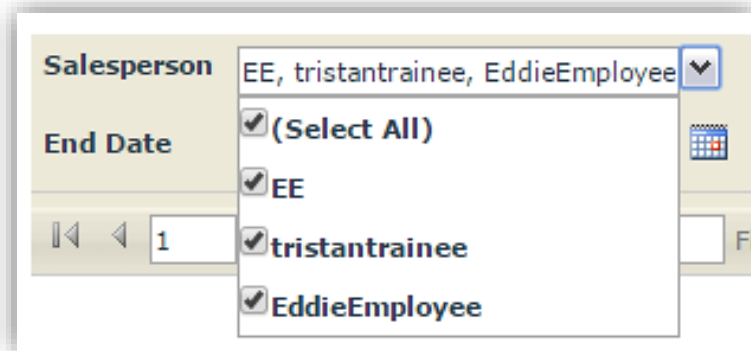
3. Touch/Click **Start Date** Field. Touch/Click **Calendar** icon. Touch/Click **Date**.

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.

Salesperson Productivity Report With Detail

Salesperson Productivity Report Without Detail

194

Art Sales Report: *Sales report for inventory items that are classified as an art item. Categorizes art sales by selected Vendor, Sales Date, Sold To (Customer Name), Item Number, Title, Cost, Pending (Balance Due) and Sold (Retail). Coming soon Commission!*

1. Touch/Click the **Reports** button. Touch/Click the **Ticket Sales** button. Touch/Click **Art 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. Vendor: The report defaults to All Vendors. Touch/Click vendor name to **De-Select and Select Vendors.**

Vendor	Artist Gallery, Prints R Us, Smith's P ⌄
	☑ (Select All)
	☑ **Artist Gallery**
	☑ **Prints R Us**
	☑ **Smith's Photography**
	☑ **The Art Company**
	☑ **Unknown**

4. Touch/Click **View Report** button to process new filters.

Start Date	10/13/2017	End Date	10/20/2017		View Report
Vendor	Prints R Us, Smith's Photography, T ⌄				

|◄ ◄ 1 of 1 ▷ ▷| ⇦ [   ] Find | Next

Art Sales Report

10/13/2017 through 10/20/2017
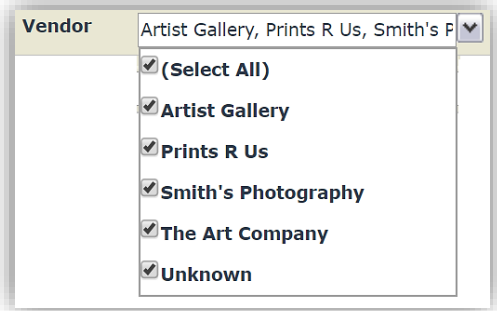
Vendor	Date	Sold To	Item #	Title	Cost	Pending	Sold	Commission
Prints R Us	10/20/2017	Carol Customer	G1234	Old Aqua Door	$50.00		$125.00	
				Subtotal:	**$50.00**		**$125.00**	
Smith's Photography	10/20/2017	Matthew Mat	J1234	Boy with Red Wagon	$25.00		$50.00	
	10/20/2017	Bill Bevel	J1234	Boy with Red Wagon	$25.00		$45.00	
				Subtotal:	**$50.00**		**$95.00**	
The Art Company	10/20/2017	Carol Customer	H1234	The Creek	$125.00		$250.00	
				Subtotal:	**$125.00**		**$250.00**	
Unknown	10/20/2017	Bill Bevel	A1234	The Italian Villa	$175.00		$315.00	$75.00
				Subtotal:	**$175.00**		**$315.00**	**$75.00**
Grand Total:					**$400.00**		**$785.00**	**$75.00**

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 |

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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

Customer ▾

Customer Revenue

Customer Export
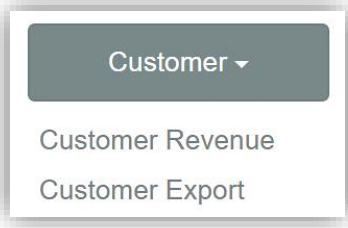
1. Touch/Click the *Reports* button. Touch/Click the *Customer* button. Touch/Click *Customer Report type.*

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.*

| Start Date | 4/1/2016 | End Date | 6/22/2016 | | | View Report |

|◀ ◀ 1 of 1 ▷ ▷| ⇦ [   ] Find | Next

Customer Revenue Summary

⊟ Show / Hide Gauge

Average Customer Revenue

⊟ Show / Hide Table

Customer Name ⬍	Framing Gross ⬍	Framing Net ⬍	Framing Discount ⬍	# Frames Ordered ⬍	# Framing Orders (Before Quantity) ⬍	Total Framing Revenue ⬍	First Frame Order ⬍	Last Frame Order ⬍
Pablo Picasso	$ 891.28	$ 891.28	$ 0.00	2	2	$11188.56	6/4/2015	4/16/2016
Margie Moulding	$ 3,110.28	$ 2,964.62	$ 145.66	4	4	$8865.31	6/4/2015	5/20/2016
Fred Fillet	$ 3,522.81	$ 3,222.42	$ 300.39	4	4	$6940.84	5/29/2015	5/11/2016
Matthew Mat	$ 1,229.54	$ 1,229.54	$ 0.00	2	2	$2099.66	7/24/2015	5/20/2016
Fanny Frame	$ 6,122.15	$ 5,871.09	$ 251.06	7	7	$5341.95	7/27/2015	5/21/2016
Bill Bevel	$ 1,426.16	$ 1,283.54	$ 142.62	2	2	$1249.12	10/6/2015	6/17/2016
Arti Artist	$ 431.51	$ 431.51	$ 0.00	1	1	$431.51	6/10/2016	6/10/2016
Mickey Mouse	$ 2,427.24	$ 2,184.52	$ 242.72	2	2	$1092.26	6/10/2016	6/10/2016
Betty Bevel	$ 1,825.97	$ 1,678.69	$ 147.28	3	3	$1015.89	4/27/2016	5/11/2016
John Smith -- LifeSaver Software	$ 681.55	$ 681.55	$ 0.00	1	1	$681.55	6/22/2016	6/22/2016

LifeSaver WebReports   Report Run at: 6/22/2016 4:26:05 PM   Page 1 of 1

Customer Export: *Displays your store's entire customer list. Export the list to be able to use it for emails, mailing labels etc.* Export instructions are listed under How to Process/Run Reports – Step 8.

> **Note:** *It will only list the information that was entered into the customer's profile.*

Name	Company	Address	City	State	Zipcode	Phone	Email
Pablo Picasso		1234 Artist Avenue	Fort Worth	TX	76179	817-234-5678	
Margie Moulding		1234 Framing Lane	Holly Springs	TX	76179	678-452-7896	mmoulding@gmail.com
Fred Fillet		1234 Picture Park Drive	Fort Worth	TX	76179	817-789-4568	
Pablo Picasso		1661 E. Camelback	Phoenix	AZ	85016	770-392-8922	
Matthew Mat		4 Corporate SQ	Atlanta	GA	30329	770-123-4567	
Fanny Frame		2500 Lake Cook Rd	Deerfield	IL	60015	456-789-1234	
Bill Bevel		1234 Picture Park Place	Fort Worth	TX	76179	8174567412	
Bob Bevel		1234 Reverse Bevel Road	Holly Springs	GA	30142	678-123-7895	
Fred Framer		1234 Frame Lane	Ft Worth	TX	76179	8171257894	
Jane Doe		9999 Example Lane	Fort Worth	TX	76179	4567891542	jd@yahoo.com
Arti Artist		1212 Art Avenue	Atlanta	GA	30306	4049517894	aa@gmail.com
Mickey Mouse						7701597894	
Betty Bevel		1234 Bevel Blvd	Holly Springs	GA	30142	4047854512	bbevel@gmail.com
John Smith	LifeSaver Software	9999 Green Tree Lane	Holly Springs	TX	30142	404-999-9999	js@gmail.com

The production reports are only effective if you track the workorders progression through the production menu.

Production ▾

Details
Past Due
Orders by Weekday
Orders by Hour
Assembly Times
Delivery Times
Production Log
Call List
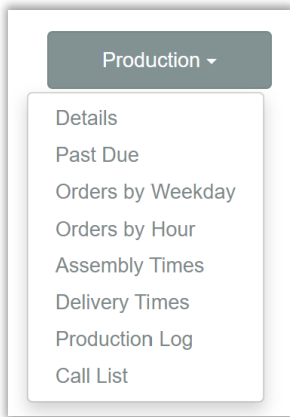
1. Touch/Click the **Report** button. Touch/Click **Production**. Touch/Click desired **Production Report Type**.

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

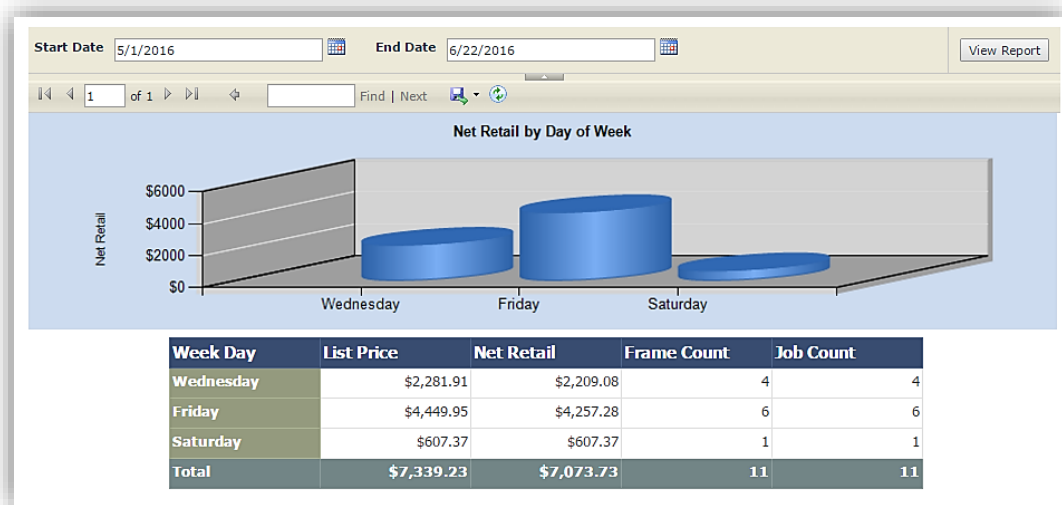| Store				Days from Order to Assembly	Days from Assembly to Due Date	Quantity	Moulding Count	Glass Type	Mat Count	Fillet Count
Training Gallery				9.3	(85.7)	3.00	1.00	AR Reflection Free®	1.33	0.00
	Invoice	**Revision**	**Work Order**	**Days from Order to Assembly**	**Days from Assembly to Due Date**	**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

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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.*

Start Date 5/1/2016   End Date 6/22/2016   View Report

Net Retail by Day of Week

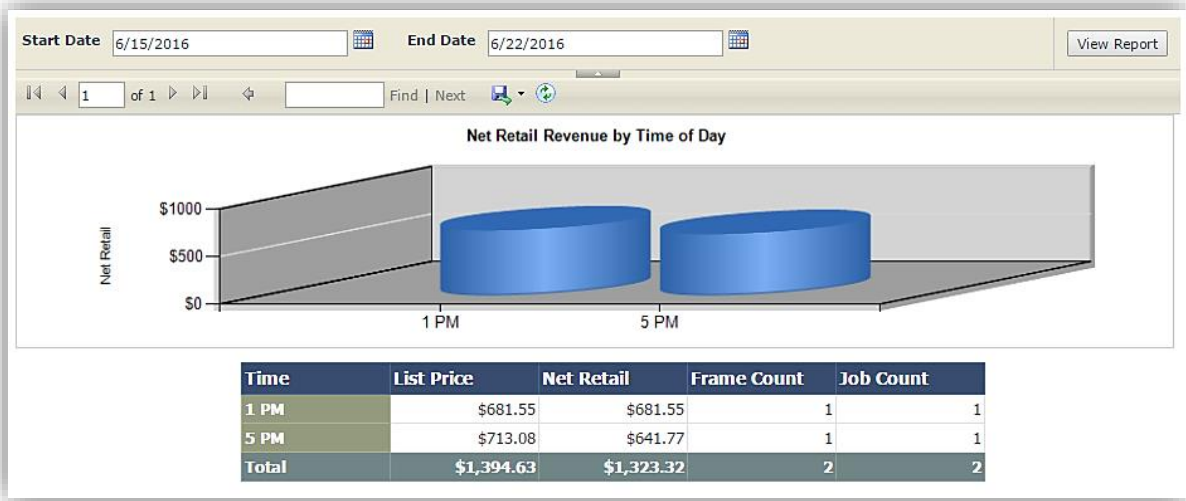| Week Day	List Price	Net Retail	Frame Count	Job Count
Wednesday	$2,281.91	$2,209.08	4	4
Friday	$4,449.95	$4,257.28	6	6
Saturday	$607.37	$607.37	1	1
Total	$7,339.23	$7,073.73	11	11

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.*

> *<u>Note:</u> 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.*

> *<u>Note:</u> 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.*
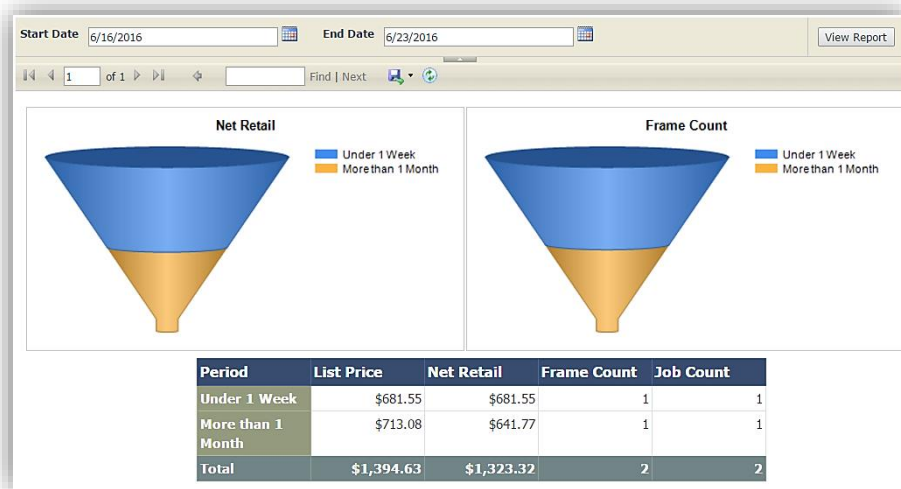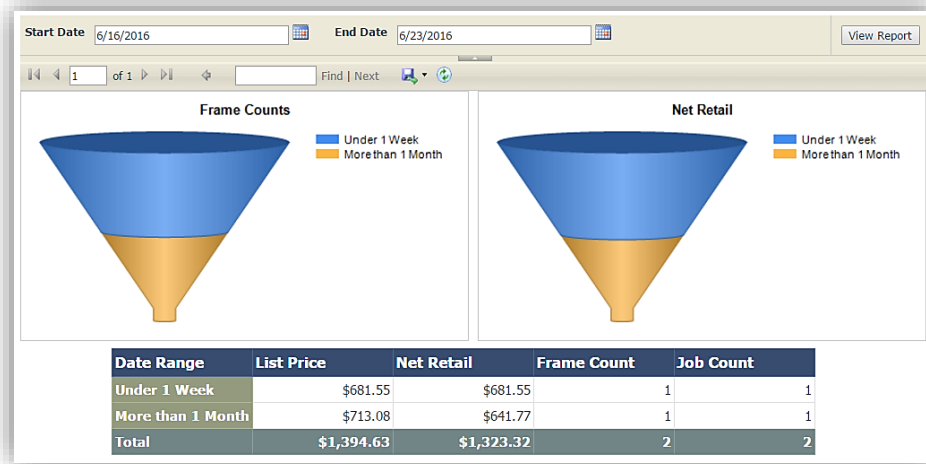
Delivery Times: *The average period of time it took to Deliver workorders in the date range selected. Displays List Price, Net Retail, Frame Count and Job Count for the orders that were delivered Under a Week and the More Than 1 Month.*

> ***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.*

Date Range	List Price	Net Retail	Frame Count	Job Count
Under 1 Week	$681.55	$681.55	1	1
More than 1 Month	$713.08	$641.77	1	1
Total	$1,394.63	$1,323.32	2	2

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 <u>all</u> workorders that need to be assembled or are in the process of being assembled.

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 Woo
	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

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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.

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.
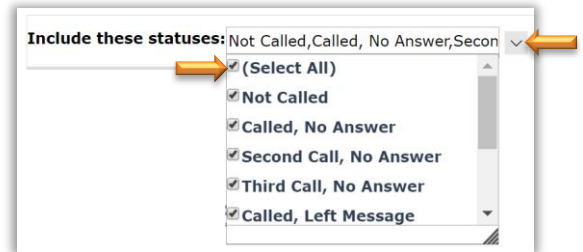

Call List - Not Called Filter

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*.
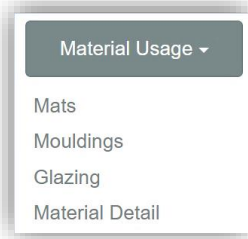   3. Touch/Click the *View Report* button to process new filter selection.

Call List – Select All Filter

The reports will give you general information on your top selling mats, mouldings and glazing.

Material Usage ▾

Mats
Mouldings
Glazing
Material Detail

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).

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 1/1/2017   **End Date** 1/21/2017   View Report
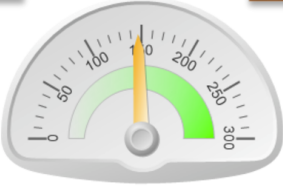
|◄ ◄ 1 of 1 ► ►| ⬦   Find | Next   💾 ▾ 🔄

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.*
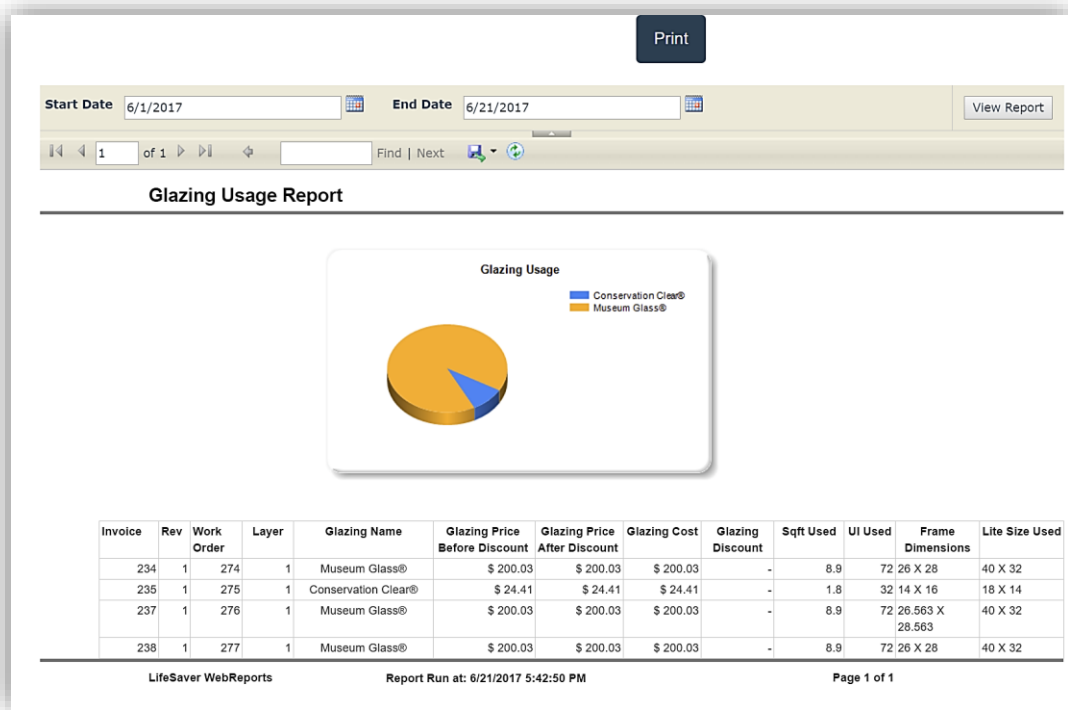
1. **Material Report Detail Worksheet**: *The report features component highlights to provide an overview of design complexity. It does not include all components, and Workorder totals may vary from the combined total of components shown. Analysis is conducted against all Workorders' most recent revision 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.*

<u>Note:</u> The Workorder Total and Average categories reflect materials and labor only.

<u>Navigation:</u> 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

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Training Gallery

1234 LifeSaver Lane
Holly Springs, GA 30142

770-123-5678

<div align="center">

Material Report Detail Worksheet

for 2/24/2019 to 3/31/2019

</div>

Run on: 4/8/2019 1:31:13 PM

Framing Components	Total	%	Total LY	% LY
Moulding Total	**$2375.98**		**$174.86**	
Fillets (in frame)	$0.00	0%	$174.86	100%
Multiple	$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%
Fillets (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		$5550.58		$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

Invoices ▾

Find Invoice

Find Invoice: *Pull up invoice to view or re-print.*

    a.   Touch/Click **Report** button. Touch/Click Invoices button. Touch/Click **Find** Invoices.
    b.   Type **Invoice #** into the Invoice Id field.
    c.   Touch/Click the **Find** button.
    d.   Invoice will display. Touch/Click to **Print**.
    e.   Touch/Click **Print** on the print preview screen.
    f.   Touch/Click **Home** button to **Exit.**

Invoice Id: 132   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
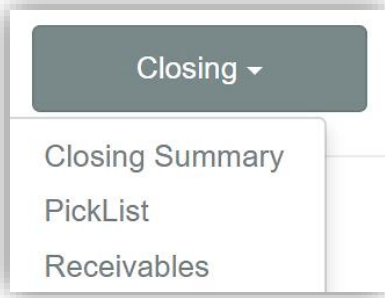
1. Touch/Click the **Report** button. Touch/Click the **Closing** button. Touch/Click **Closing Report Type**.

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.

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 would 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. The **End of Workorder Range** will auto fill.

Start of Work Order Range:	499	End of Work Order Range:	503

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: Work Orders To Do,InProgress,Fram
   - ☑ (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
   - By Customer
   - Moulding by Vendor
   - Mat by Vendor
   - Fabric by Vendor
   - All Materials by Vendor

4. Touch/Click the **View Report** button to process. **Demo Example:** *Filters: Workorders to Do and By Customer.*

Start of Work Order Range:	499	End of Work Order Range:	503		View Report
Order Status:	Work Orders To Do		Report Type:	By Customer	

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Training Gallery

1234 LifeSaver Lane
Holly Springs, GA 30142

770-123-5678

Pick List by Customer

August 17, 2020

Customer	W/O	Rev	Qty	Done	Moulding	Bin	Length	Mat/Fabric	Bin	Size	Glass	Mounting	Art	Due	Rush
Bevel, Betty	499	1	1	No	R103256		6.0	C1000		12 1/2 X 12 1/2	Museum Glass®	AcidFree		7/3/2020	
								C921		12 1/2 X 12 1/2				7/3/2020	
	503	1	1	No	L569240		10.0	C1000		24 X 24	Museum Glass®	AcidFree		7/6/2020	
Coast, West	501	2	1	No	R103256		6.0	C1000		20 1/2 X 12 1/2	Museum Glass®	AcidFree		7/6/2020	
								C921		20 1/2 X 12 1/2				7/6/2020	
Fillet, Fred	500	1	1	No	L569240		11.0	C9503		27 X 27	Museum Glass®	AcidFree		7/6/2020	
								C9889		27 X 27				7/6/2020	
								C9546		27 X 27				7/6/2020	
	502	1	1	No	R124187		11.0	C1061		23 1/4 X 31 1/4	Museum Glass®	AcidFree		7/6/2020	
					R121		7.0	C1085		23 1/4 X 31 1/4				7/6/2020	

Page: 1

Pick List

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: | 30 | Maximum days old: | 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	
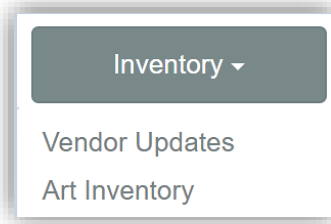
1. Touch/Click *Reports* button on the Main Menu. Touch/Click *Inventory* button drop down arrow. Touch/Click *Inventory Report Type*.

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.

Art Inventory: *The report will list your active art inventory items dependent on seleced filters and will be categorized by: Item Number, Title, Description, Artist, Cost, Retail, Quantity, Vendor Name, and Bin #. The report will also list the Total Cost of Goods.*

Note: The report does not list Finished Product or Supply items.

1. The report will process and display the entire art inventory. It will be necessary to touch/click and drag the bottom horizontal slider bar to view all categories.

2. Touch/Click the **Print** button to print report. The report can also be exported.

3. The following filters are available.

   - In Stock Items Only: **False** (No) is the default. This false filter **will display** art inventory items that have a quantity of zero. Touch/Click **True** (Yes). This filter **will not display** art inventory items with the quantity of zero.
   - Bins Only: **False** (No) is the default. The false filter will display all art inventory item **with or without** a bin assignment. Touch/Click **True** (Yes). The true filter will **only display** art inventory that contains a bin assigment.
   - Consigned Items: The default is **Show All**. This filter will display all art 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

4. Touch/Click the **View Report** button to process newly selected filters.

Item Number	Title	Description	Artist	Cost	Retail	Qty	Vendor Name
A1234	The Italian Villa	The Italian Villa - Print - 20x18	Art Guy	$175.00	$0.00	25	Unknown
F1234	The Winding Creek	Print	Art Artist	$150.00	$0.00	24	Artist Gallery
G1234	Old Aqua Door	Print	Art Artist	$50.00	$0.00	24	Prints R Us
H1234	The Creek	The Creek 16x20 Art Print	Artie Artist	$125.00	$0.00	24	The Art Company
J1234	Boy with Red Wagon	Photo	Art Guy	$25.00	$0.00	23	Smith's Photography

Art Inventory Report

Wednesday, December 13, 2017

Total Cost of Goods: $12,750.00

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 |

| | 1 of 1 | | | | Page Width ⌄ | | | | Find \| Next |

Tax Exempt Order Summary Report

Run on: 1/7/2021 2:58:26 PM

for 12/1/2020 to 1/7/2021

Training Gallery

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
					Tax Exempt Delivered Order Summary Report			Run on: 1/7/2021 4:27:47 PM	
					for 12/1/2020 to 1/7/2021				
					Training Gallery				
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
					Tax Exempt Payment Summary Report			Run on: 1/7/2021 4:16:35 PM	
					for 12/1/2020 to 1/7/2021				
					Training Gallery				
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

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.*
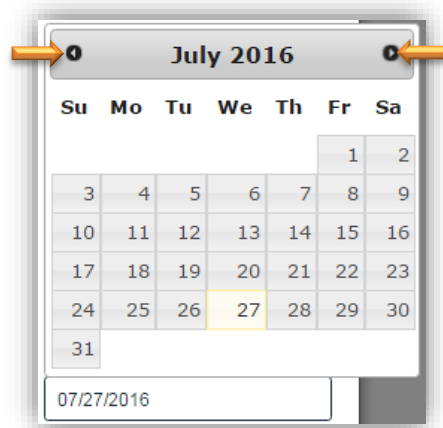
Promotion Calendar

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

Create Promotion Window

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

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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.
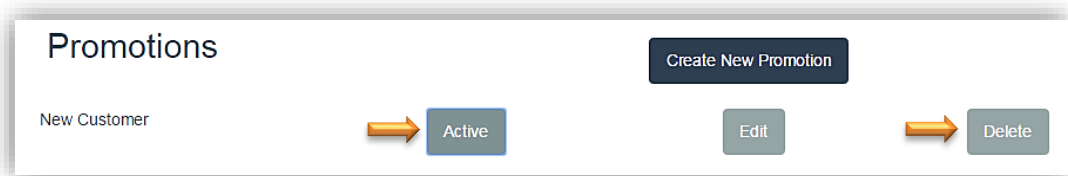
Deactivate/Activate or Delete Promotion

Manager Override

Create and Delete Manager Override Reason Codes to be applied to the workorder. De-select/Select the Manager Overide User Permissions in the Security menu.
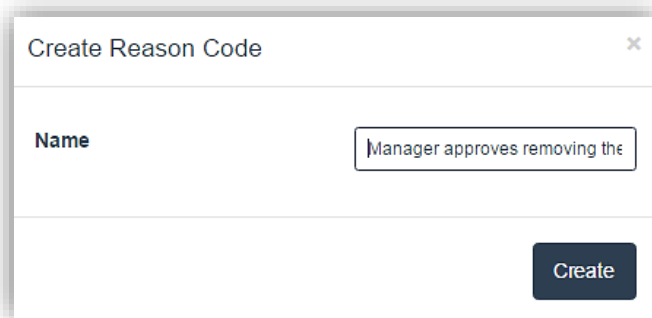
1. Touch/Click the **Manager Override** button on the Home screen.

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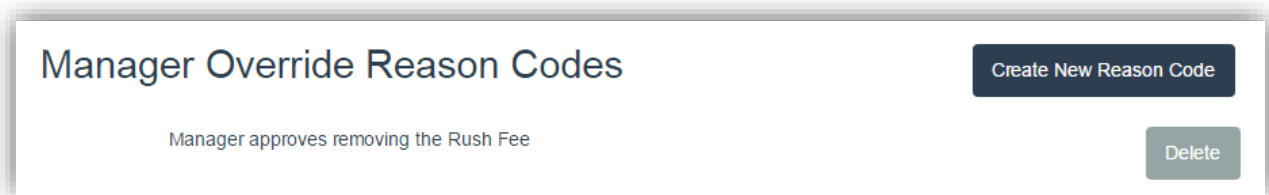
3. Touch/Click **Create** button.

Create Manage 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

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.

Roles for user: EddieEmployee

Select Role Assignments

Select	Role	Description
☐	ManagerOverride	This role has the right to perform manager override functions

Manager Override Role Assignment Deactivated

Update details that includes New Features and Bug Fixes.

1. Touch/Click the Release Notes menu button on the home screen.
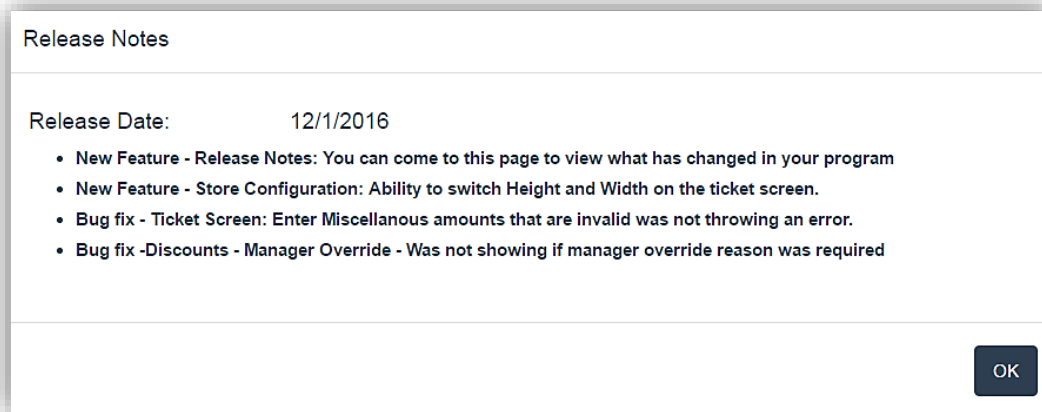
Release Notes

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 Miscellanous amounts that are invalid was not throwing an error.
- Bug fix -Discounts - Manager Override - Was not showing if manager override reason was required

OK

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. Touch/Click the *Workorder Start* field. Type the *Workorder #* you would like the picklist to begin with.

3. Touch/Click the *Workorder End* field. Type the *Workorder #* you would like the picklist to end with.

Filters/Options

4. Process *All Materials or a Single Component* category for the workorder 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.**
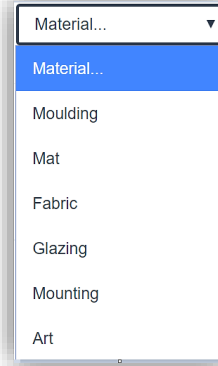
5. Process **All Vendors** or a **Single Vendor**.

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.
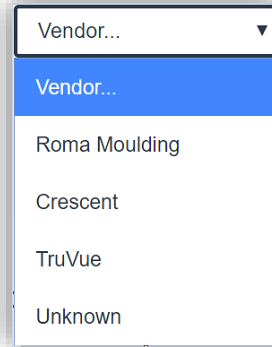
6. **Show Ordered?** Touch/Click field to **Select** if you would like the picklist to display components that have already been ordered. The line item will display a check mark in the Showed Ordered? field.

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.

Pick List Filters

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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. Print button will be coming soon.

    Note: *The picklist under Reports – Closing can be printed.*

Pick List

Work Order Start	311		Work Order End	314		Material	Material... ▼		Vendor	Vendor... ▼

Show Ordered? ☑   Show Used Stock? ☑

Type	Material	Vendor	Customer	W0	Rev	Done?	Quantity	UOM	Amount	Unit Cost	Ext cost	Size	Due	Ordered?	Use Stock?
Moulding	R103106	Roma Moulding	Mat, Matthew	312	5		1	Length	8	5.63	45.04	22 X 19	11/30/2017	✔	☐
Mat	C1000	Crescent	Mat, Matthew	312	5		1	Each	1	4.79	4.79	22 X 19	11/30/2017	☐	☐
Glazing	Museum Glass®	TruVue	Mat, Matthew	312	5		1	Each	1	84.32	84.32	22 X 19	11/30/2017	☐	☐
Mounting	AcidFree	Unknown	Mat, Matthew	312	5		1	Each	1	17.63	17.63	19 X 22	11/30/2017	☐	✔
Moulding	R103106	Roma Moulding	Mat, Matthew	313	5		1	Length	7	5.63	39.41	20 X 15	11/30/2017	✔	☐
Mat	C1000	Crescent	Mat, Matthew	313	5		1	Each	1	4.09	4.09	20 X 15	11/30/2017	☐	☐
Glazing	Museum Glass®	TruVue	Mat, Matthew	313	5		1	Each	1	61.94	61.94	20 X 15	11/30/2017	☐	☐
Mounting	AcidFree	Unknown	Mat, Matthew	313	5		1	Each	1	15.05	15.05	15 X 20	11/30/2017	☐	✔

Pick List

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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 - Cut Mat ID

4. Open the *Valiani Studio* program. Click on *Create*.
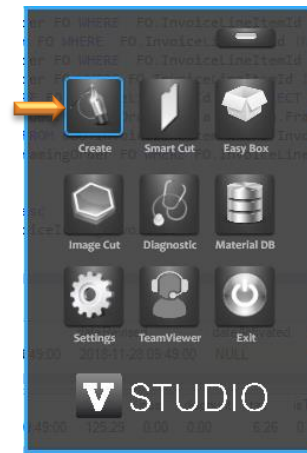
Valiani Studio Menu

5. Click on *LifeSaver POS* in the menu bar located left top screen.
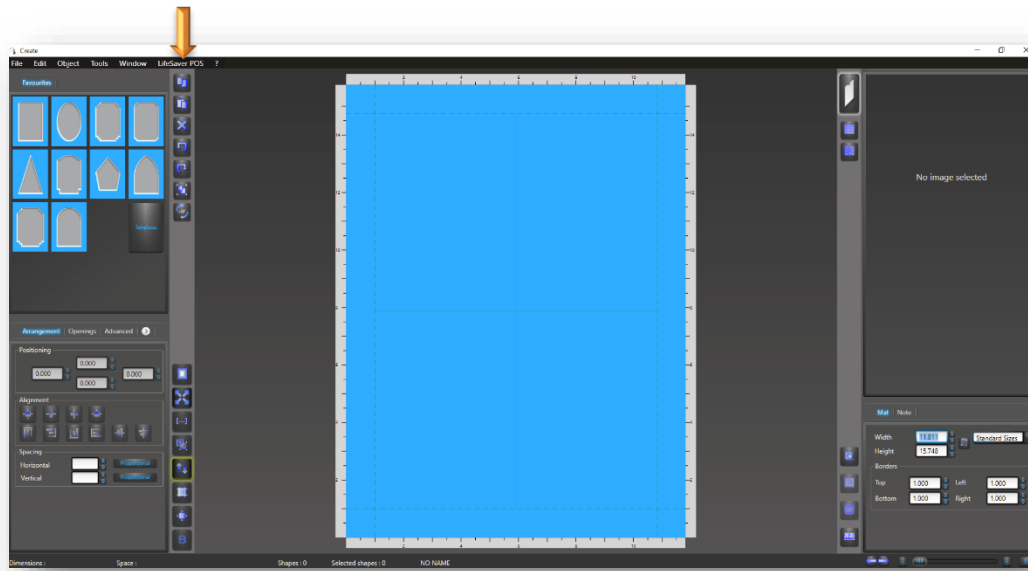
Valiani Studio Create Screen – Lifesaver POS

6. Type *Cut Mat ID Number* into the Order Code field. Click the *Open* button.
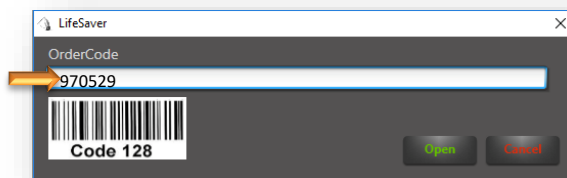
LifeSaver - Type Mat Cut ID

7. Mat Cut Image opens in the Create screen. Follow Valiani Studio instructions to proceed.
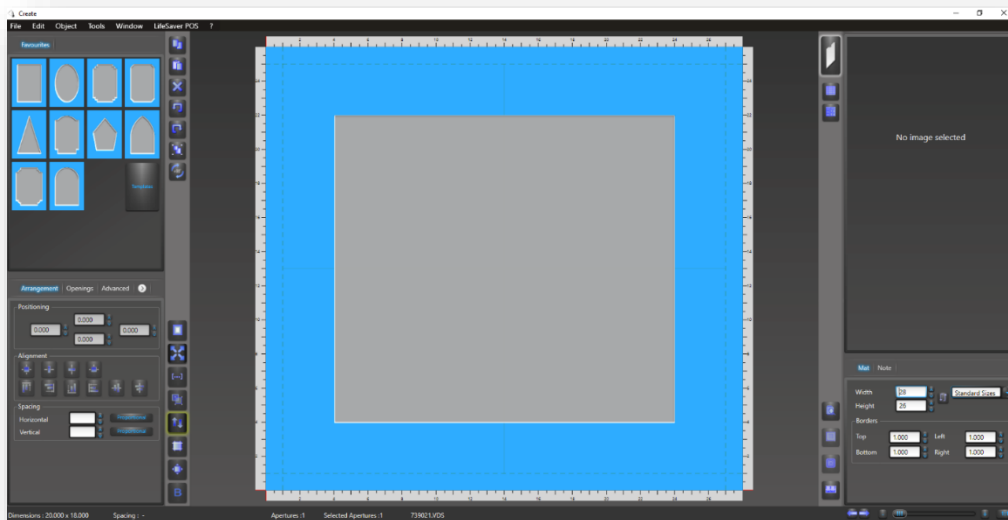
Valiani Cut Mat Image

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.

5. Double Click/Touch *Cut Mat Download File* located bottom left screen to open the Wizard program.

6. Follow Wizard CMC instructions to proceed with the mat cutting process.
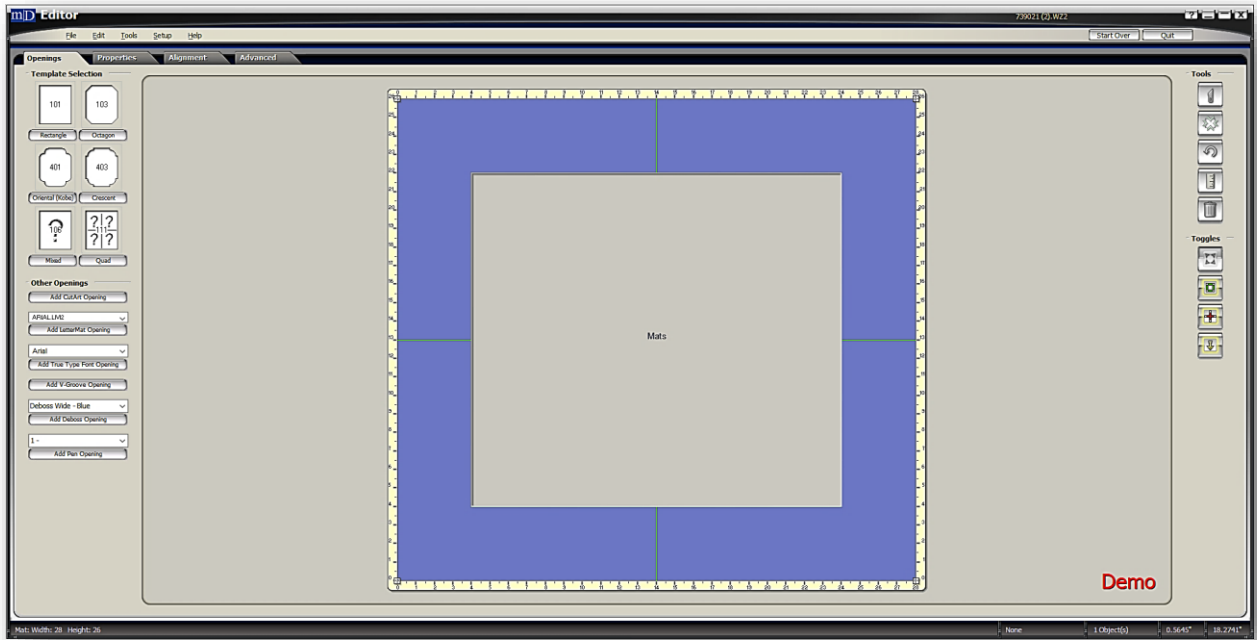
The Order Menu is a great management tool for your workshop. Create, Manage and Update workorder statuses to track the workorder's progression through the production process. This order screen is similar to the current production screen but is a grid-based layout. It allows you to update the status on 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.

Order Screen

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

3. The customer Betty Bevel's invoice/workorder line item displays.

4. Touch/Click *Reset* button located in upper right screen corner to return to original Order list.
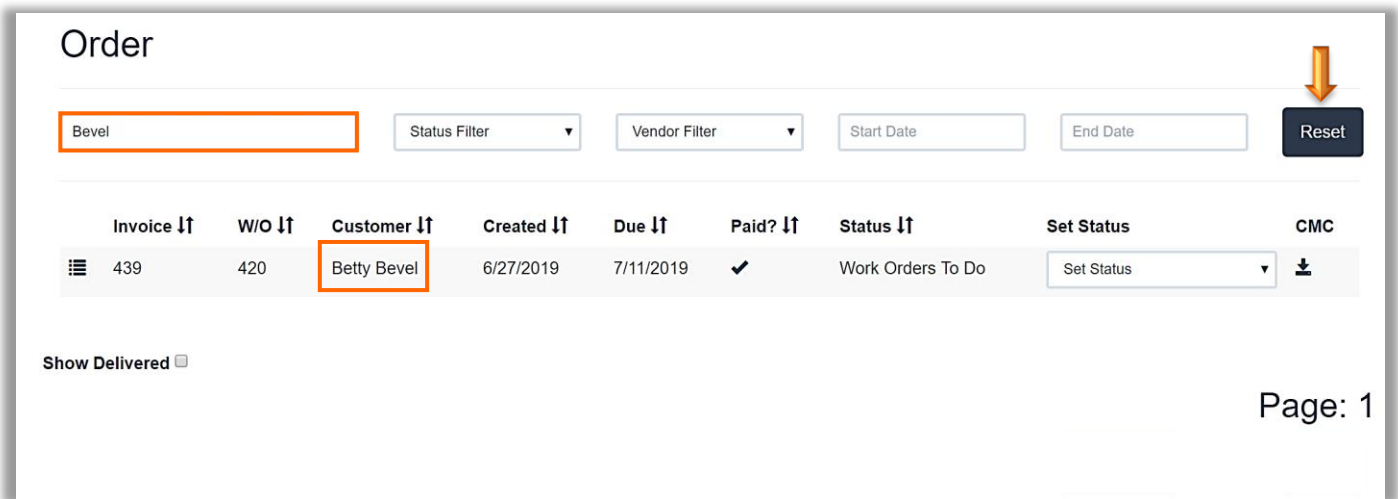
Order Screen - Search

Status Filter

To view all invoices/workorders that fall into one status category.

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

2. Touch/Click the *Status Filter Drop Down Arrow*. Touch/Click desired *Status. Demo Example: Workorders to Do.*
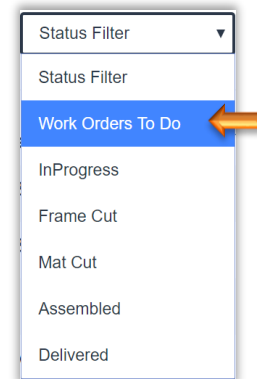
3. The list will now contain all invoices/workorders that fall into the *Workorders To Do Status*.

4. Touch/Click *Reset* button located in upper right screen corner to return to original Order list.

Order Screen - Filter Status

Vendor Filter: *Coming Soon!*

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.
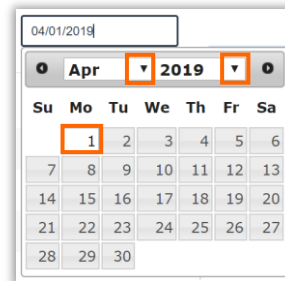
3. Touch/Click the *End Date Field*. Touch/Click desired *Date*. *Demo Example:* 04/30/2019

   Note: Touch/Click Month/Year Arrows to select new Month/Year.
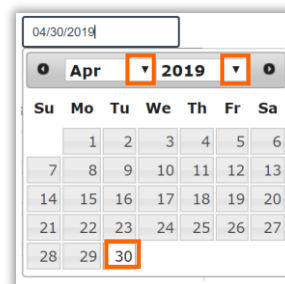
4. The Order list will display according to the selected date range.

5. Touch/Click **Reset** button located in upper right screen corner to return to original Order list.
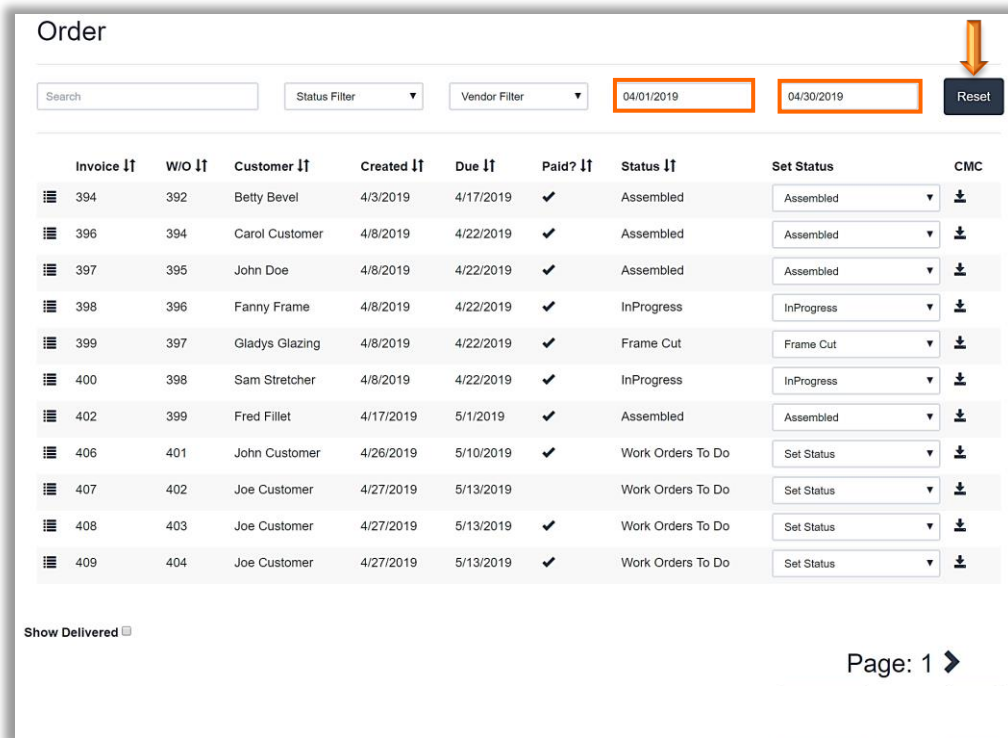
Order Screen - Select Date Range

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 List - Filtered by Status

Showed 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 – Showed Delivered

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.*
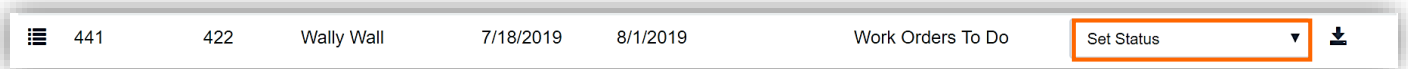
3. Touch/Click the **Set Status** drop down arrow.
   Touch/Click **In Progress.**

4. The production status is now **In Progress**.

   Note: *To update status on individual workorder components, please see the following section.*

Order Screen – Update Status

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*

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*
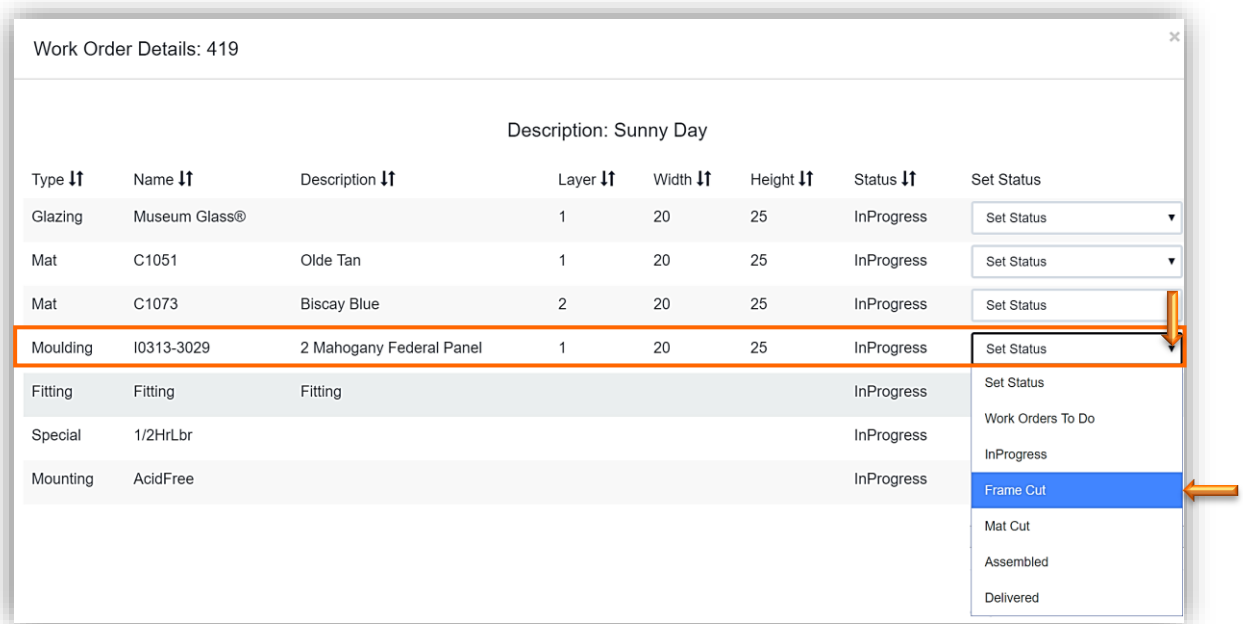
Order - Workorder Details – Set Component Status

5. Touch/Click the **OK** button to return to the Order Screen.
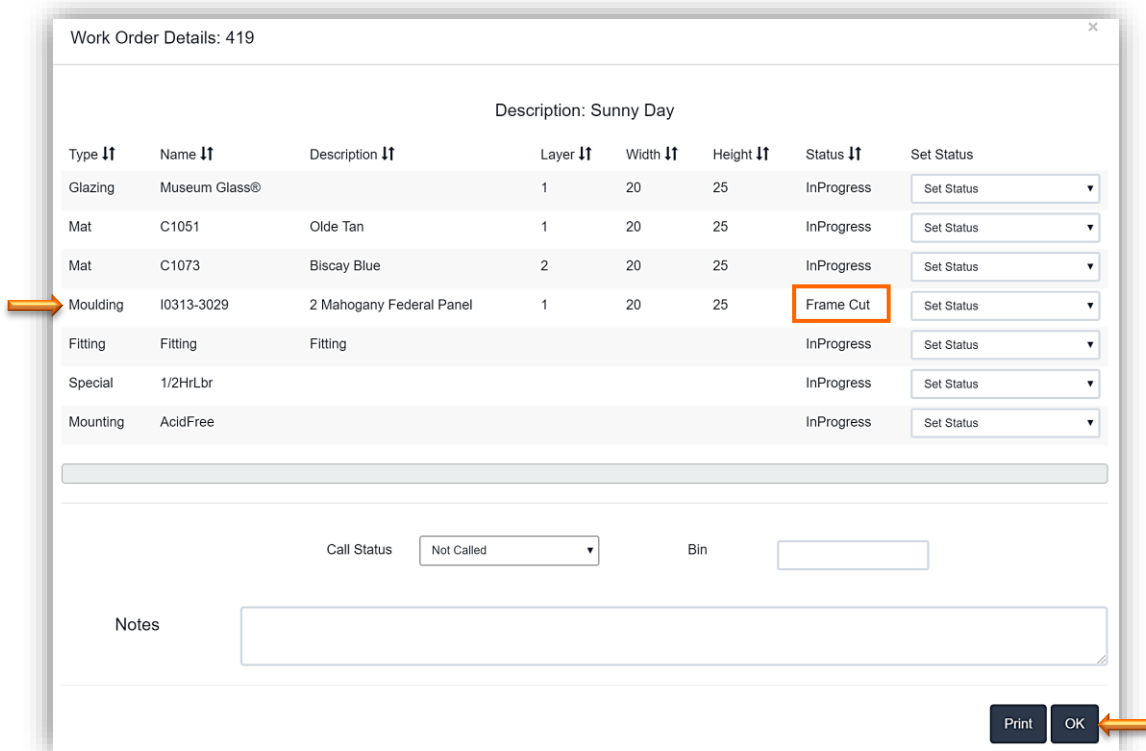
Order – Set Status to Frame Cut - Close Workorder Detail Window
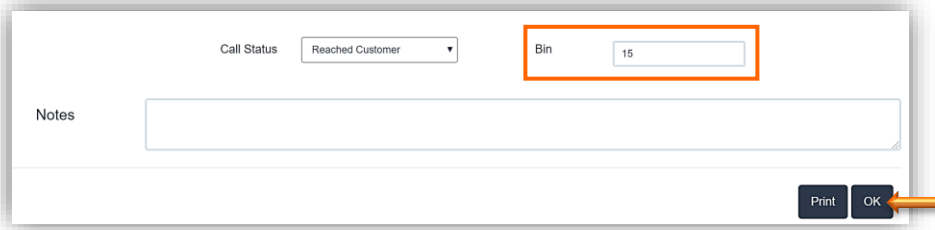
1. Touch/Click the **Order** button on the Main Menu.

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.
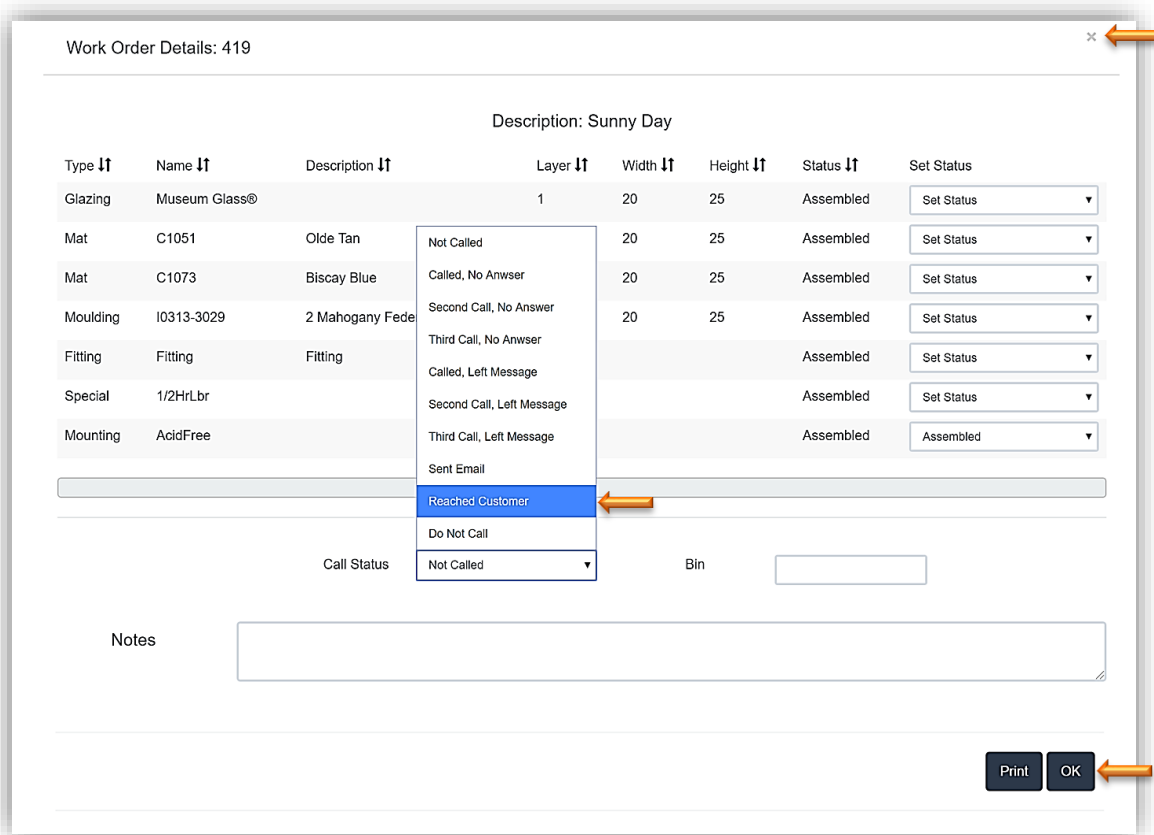
Order – Workorder Details – Update Call Status

Add Bin Number
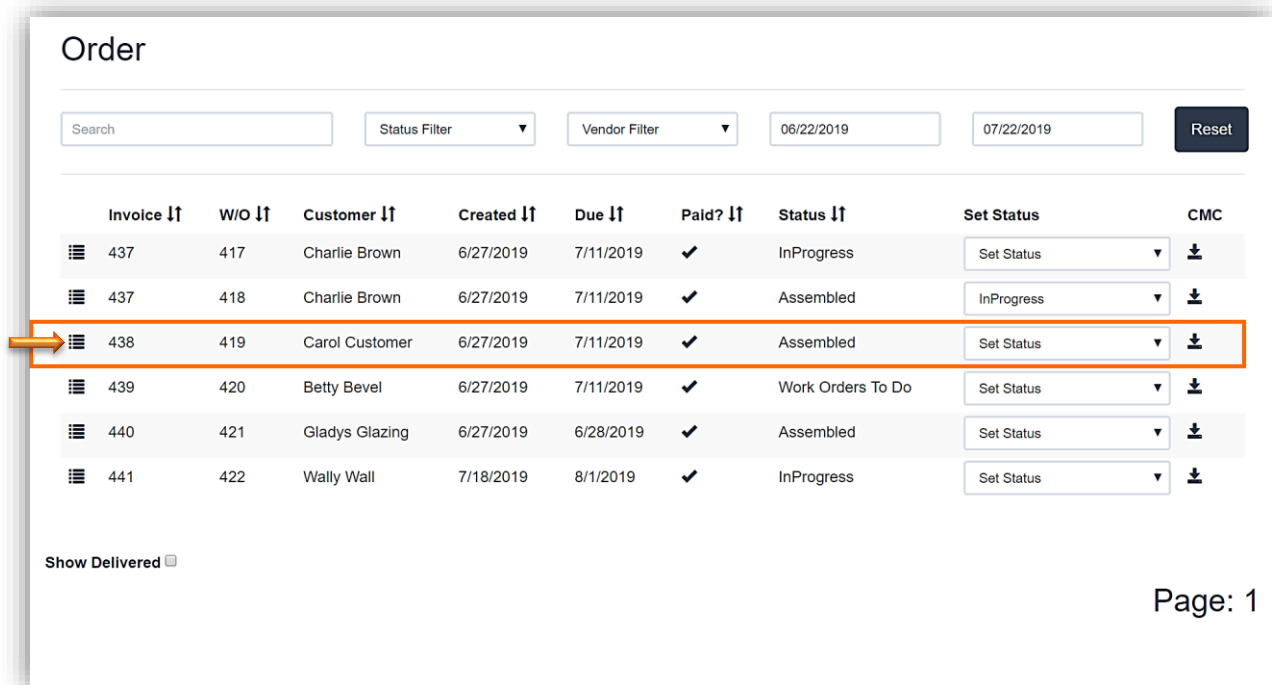
1. Touch/Click the **Order** button on the Main Menu.

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.*

Order - Select - Workorder Details

3. The Workorder Notes are located in the middle of the Workorder Details window. Touch/Click into the Notes field. *Type Notes*.

4. Touch/Click the *OK* button.

Notes	Call the customer when the work order is completed.

Print   OK
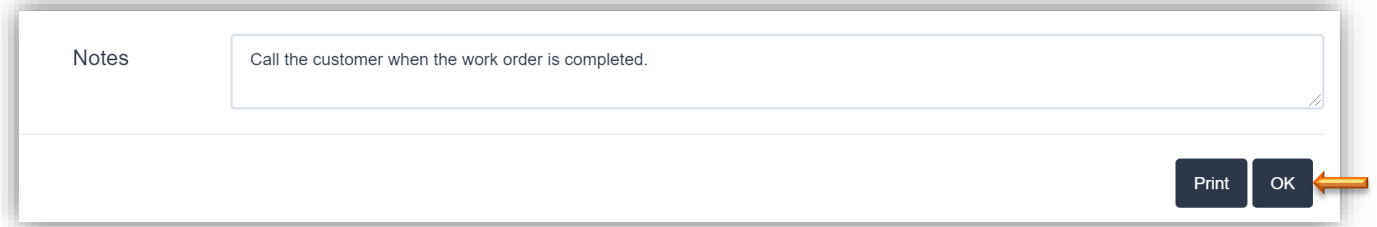
Order - Workorder Details – Workorder Notes

Print Workorder Copy

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: 437 – W/O #418.

	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

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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

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 - 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***.

Order - Workorder Details – Workorder/Component Status History

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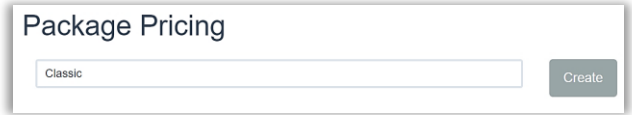*Refer to the CMC instructions for Wizard and Valiani in the previous section.*

Order - Send to CMC

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.
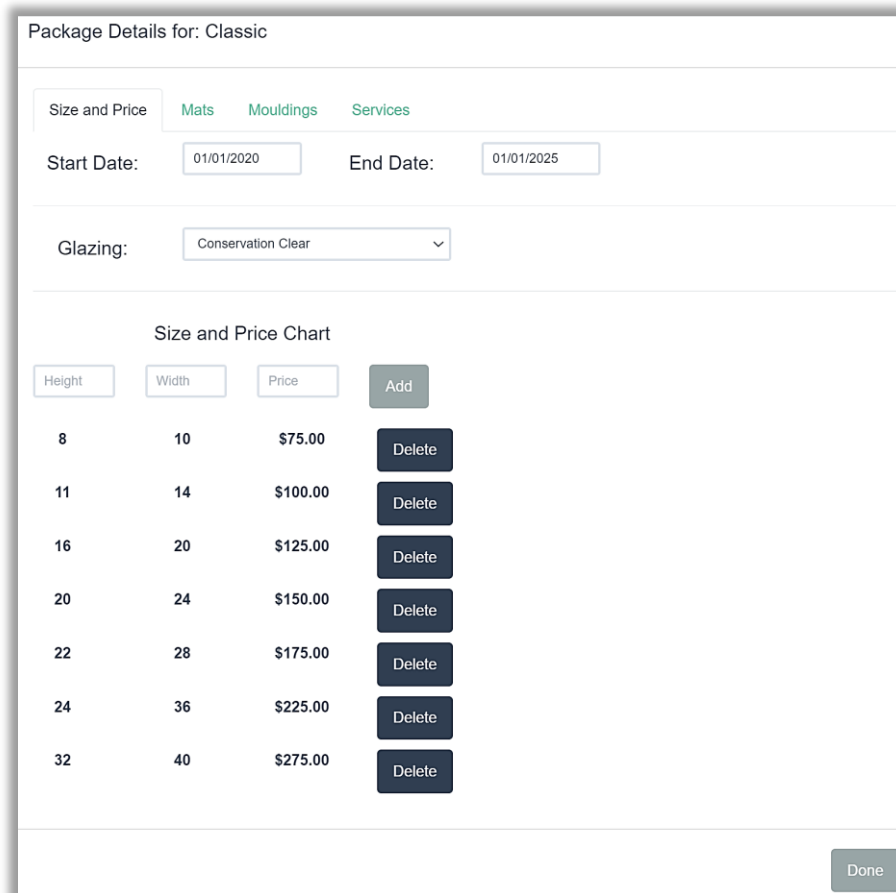
   Package Pricing

   | Classic | Create |

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.

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.

Completed Mats Package Details

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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

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Printing Services are available from IM Graphics Group which is a division of International Moulding. Add vendor, set your markup table, write an order, then transmit it through your LSS Cloud program. The following substrates are available: Acrylic, Wood, PVC, Aluminum and Canvas. Go to https://imgraphicsgroup.com for more info on the services offered and to view their portfolio.

If your shop offers printing you can create print service types with pricing and write your own printing service orders.