



LSS Cloud

Quick Set-Up Guide

Welcome

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

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

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

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

You can reach us at www.lifesaversoft.com or call us toll free at 1-800-381-0600. We are available Monday 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>**

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System Requirements

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

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

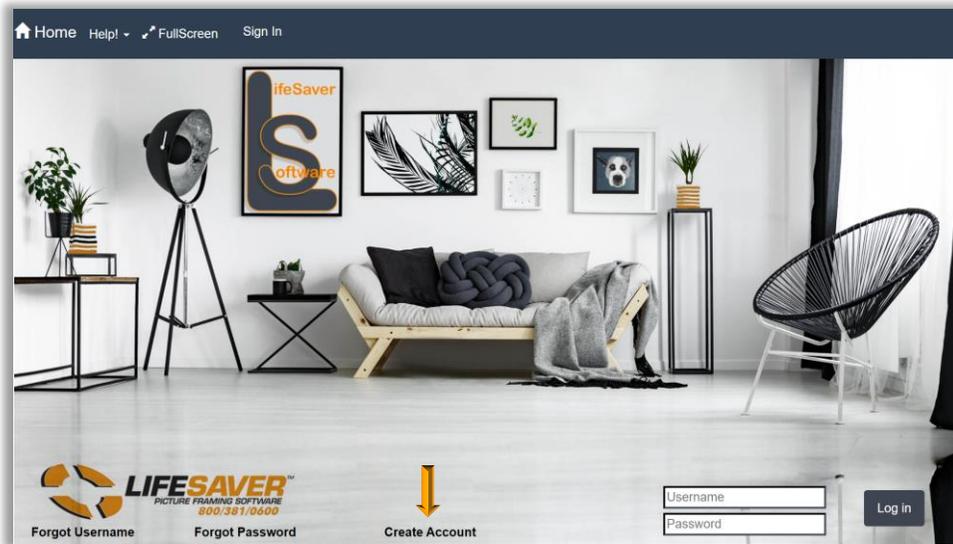
- **Internet Browsers:** Safari & Chrome

Getting Started

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

Register To Demo Or Purchase LifeSaver Cloud

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



LifeSaver Cloud Log In - Register Screen

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

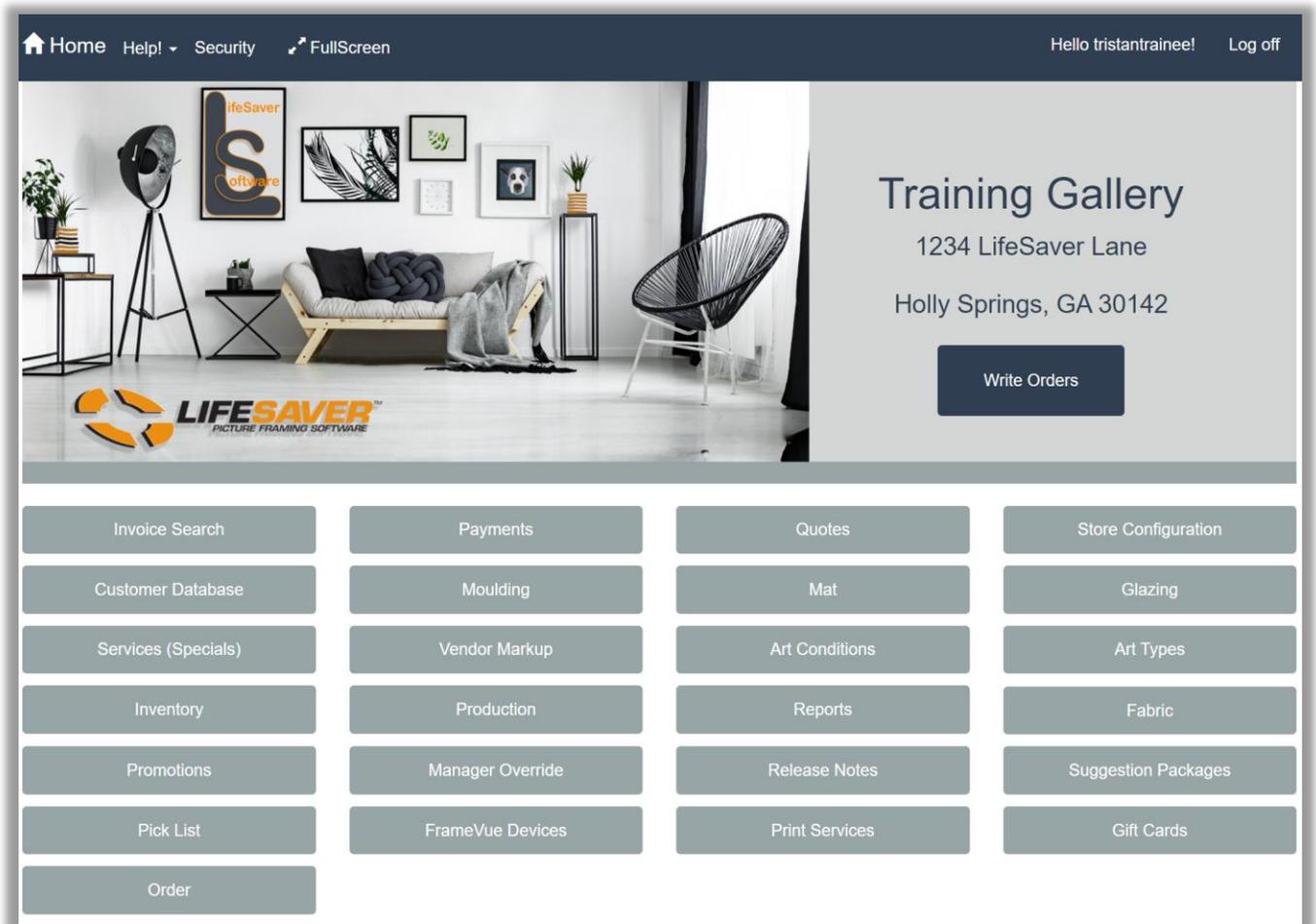
New Store Registration.

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

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

New Store Registration Screen

4. The LifeSaver Cloud Home Menu Screen will display.



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

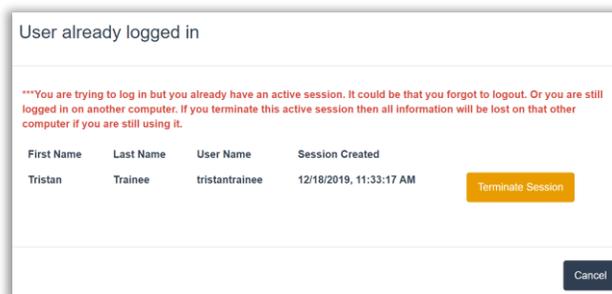
Log Off

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



User Already Logged In

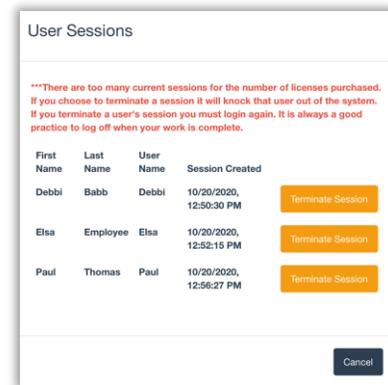
If you did not log out of your previous session and you login in again, you will receive the following pop up window.



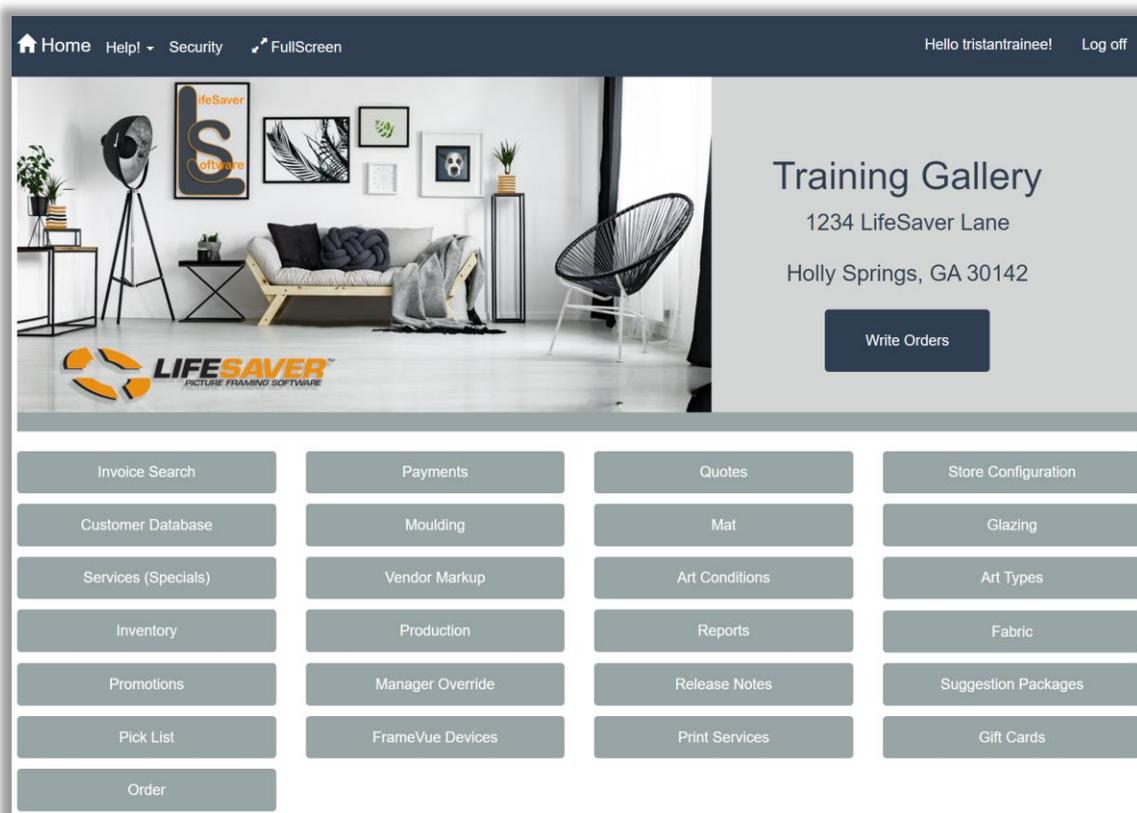
1. Touch/Click the **Terminate Session** button.
2. You will be return to the Home screen. Type **Password**. Touch/Click **Log In** button.

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 moulding's details, such as description, vendor, size, type, cost, markup and retail price. Display selected vendor's moulding product list. Designate in store stock moulding.
- 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

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

Save

Store Configuration - Workshop Tab

Taxes Tab

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

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

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

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

Store Configuration

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

City Labor 0.000 Material 0.000 Local Labor 0.000 Material 0.000

County Labor 0.000 Material 0.000 Regional Labor 0.000 Material 0.000

State Labor 7.000 Material 7.000 National Labor 0.000 Material 0.000

Save

Store Configuration - Taxes Tab

Credit Card Processor Tab

Make your LifeSaver 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

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

Merchant Processor Cayan

Cayan

Merchant Name V...

Merchant Key FOKAA-Q0M4O-V0EEI-5XQKG

Merchant Site ID B61

Device IP Address 192..

[Click here to Learn more about our NEW integrated credit card processor Cayan!](#)

Save

Store Configuration – Credit Card Processor Tab

Settings Tab

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

1. Touch/Click on the **Settings** Tab.
2. **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. **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.*
26. **Default Moulding UOM:** Select the default moulding unit of measure (Join-Chop-Length) for all moulding vendors in your database. Leave selection on None if you would like to setup the default UOM by moulding vendor.
27. **Default Mat Costing Method:** Select the default mat costing method (Sq. Inch – Sq. Meter – UI – Sheet – Cut Sheet – Quarter Sheet) for all mat vendors in your database. Leave selection on None if you would like to setup the default costing method by mat vendor.
28. **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.

29. **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.
30. **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.
31. **Allow manual entry items on an invoice?:** Select if you do not want the option to add manual entry items to the invoice.
32. **Show charge account payment option on the payment screen?:** Select if you offer in-house charge accounts.
33. **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.
34. **Measurement Unit:** Select Inch (Imperial) or Millimeter (Metric).
35. **Currency Type:** Select currency type in the drop-down list.
36. **Do not show details on quote?:** Select if you only want the Quote to display subtotal, tax and total on the Quote form.
37. **Do not show totals on workorder?:** Select if you do not want the workorder total cost to display on the workorder form.
38. **Include inventory items on production screen?:** In addition to workorders select this option to display inventory items sold to the customer.
39. **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.
40. **Do not show cost on pick list?:** Select if you do not want the costs to display on the pick list.
41. **IM Print Default Distribution Center:** Select location if applicable.
42. **Show Groupon Payment option on the payment screen?** Select if you would like to accept Groupons.
43. **Order Screen:** Number of days to search date from current date.
44. **Additional amount per glazing:** Add additional dollar amount to be added to the glazing price in a workorder.

45. **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.

Store Configuration

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

Reveal Top	<input type="text" value="3"/>	Reveal Bottom	<input type="text" value="3"/>	Reveal Left	<input type="text" value="3"/>	Reveal Right	<input type="text" value="3"/>
Reveal 2nd Mat	<input type="text" value="1/4"/>	Reveal 3rd(+) Mat	<input type="text" value="1/4"/>				

Require Customer?

Use Add Reveal?

Ticket Screen: Width X Height?

Require Manager Override?

Require Art Type?

Require Art Condition?

Require Promotion?

Lock Moulding UOM?

Prompt to check fillet width?

Hide the discount option when you write a work order?

Moulding Waste Per Corner

External Payment Process?

Use new production screen?

Show Glazing On Layer?

Decrement Inventory?

Warn when inventory falls below threshold?

Additional amount per foot

Use default fitting charge?

Show frame club payment option on the payment screen?

Additional amount per mat

Additional amount per mounting

Default Work Order Lead Time

Default Moulding UOM

Default Mat Costing Method

LaborAsPercentOfMaterials %

Print Invoice and WO in Black and White?

Print external store number on invoice?

Allow manual entry line items on an invoice?

Show Charge Account payment option on the payment screen?

Show Write Off payment option on the payment screen?

Measurement Unit:

Currency Type:

Do not show details on quote?

Do not show totals on work order?

Include inventory items on production screen?

Require all work orders on an invoice to be delivered together?

Do not show cost on pick list?

IM Print Default Distribution Center:

Show groupon payment option on the payment screen?

Order Screen - Number of days to start search from current date

Additional amount per glazing

Minimum mat price is X times cost

Store Configure - Settings Tab

46. Click on **Save**.

Store Information Tab

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

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.

The screenshot shows a 'Store Configuration' window with several tabs: Workshop, Taxes, Credit Card Processor, Settings, Store Information (highlighted), Printing, and Production. The 'Store Information' tab is active and contains the following fields:

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		

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

Store Configuration – Store Information

Printing Tab

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**.

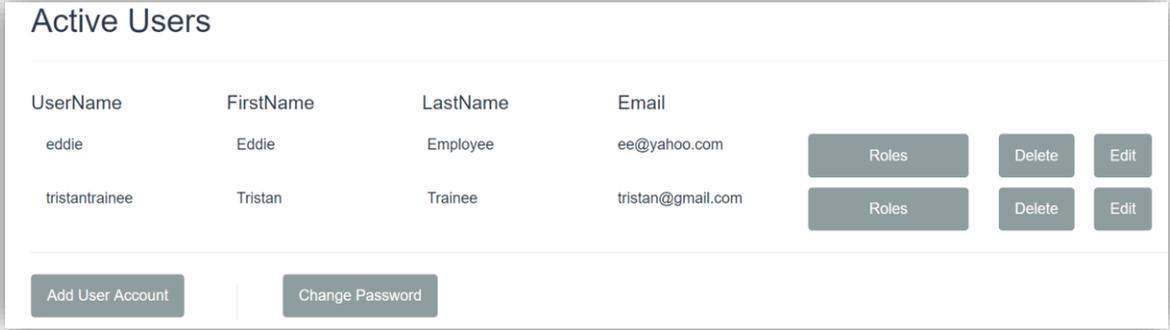
Store Configuration - Production

Security – Store Admin Function

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

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

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



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

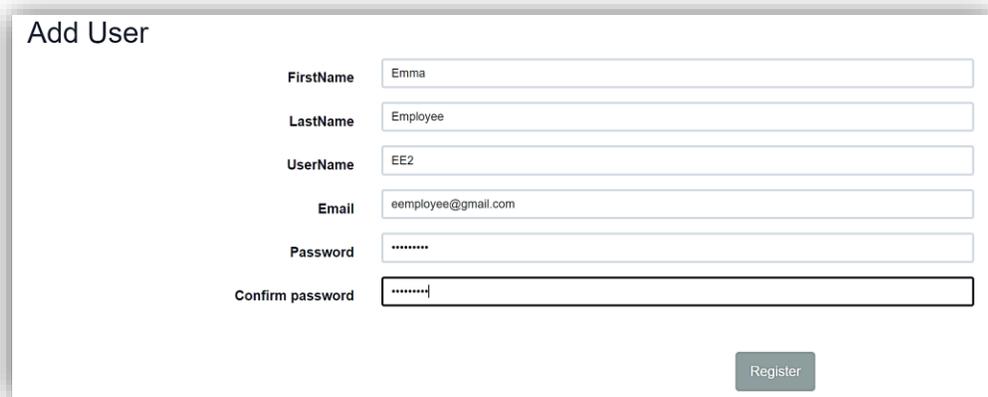
UserName	FirstName	LastName	Email	Roles	Delete	Edit
eddie	Eddie	Employee	ee@yahoo.com	Roles	Delete	Edit
tristantrainee	Tristan	Trainee	tristan@gmail.com	Roles	Delete	Edit

Buttons: Add User Account, Change Password

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.**



The screenshot shows a form titled "Add User". It contains the following fields: FirstName (Emma), LastName (Employee), UserName (EE2), Email (eemployee@gmail.com), Password (masked with dots), and Confirm password (masked with dots). A "Register" button is located at the bottom right.

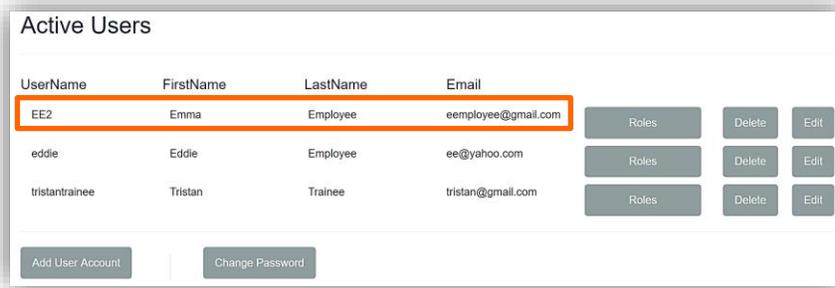
Fields: FirstName (Emma), LastName (Employee), UserName (EE2), Email (eemployee@gmail.com), Password (masked), Confirm password (masked)

Button: Register

Add User

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

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



Security - Active Users

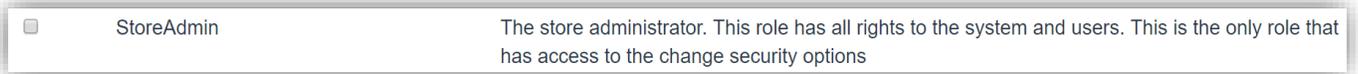
Set Role Permissions

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**.

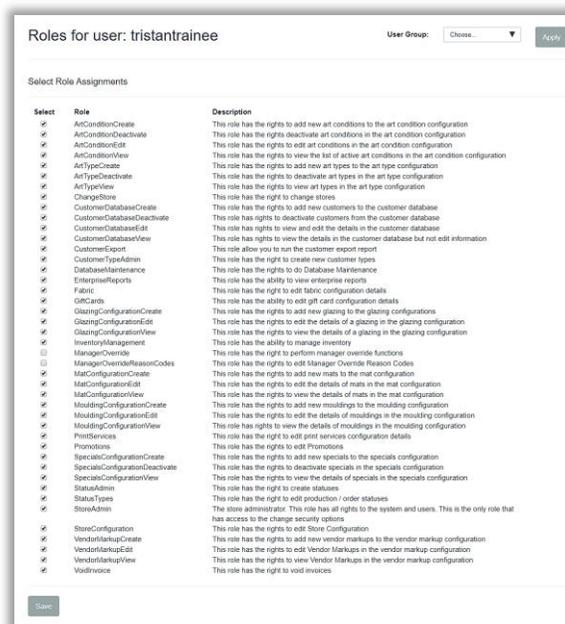
Note: Roles can be edited at any time.

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.

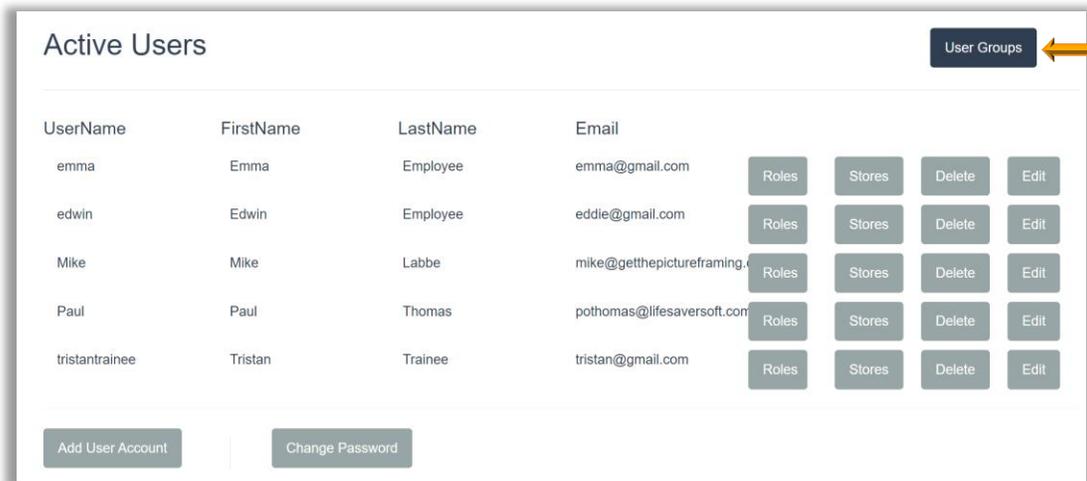
1. Touch/Click the **Stores** button on the corresponding employee line item.
2. Touch/Click **Store Location(s)/Number(s)**. Touch/Click the **Done** button.

User Groups

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

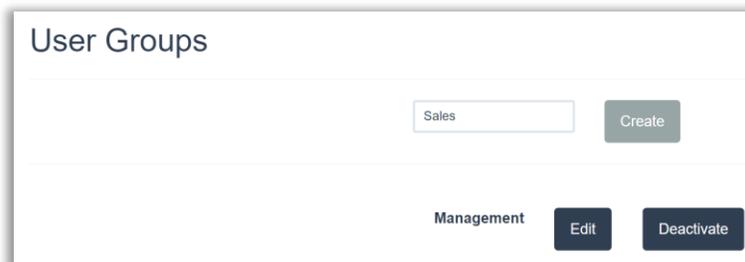
Create

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

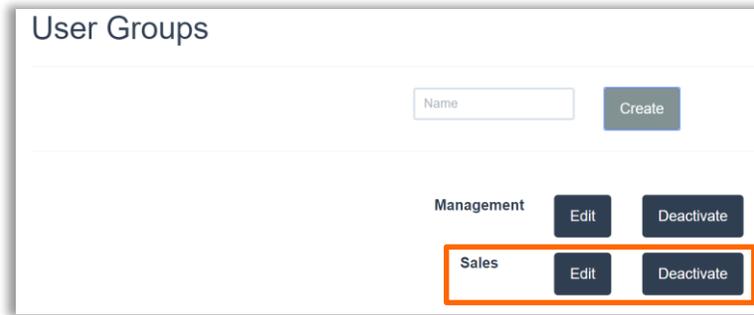
3. Touch/Click into the User Group Name field. **Type Name**. Touch/Click **Create**.



Security – Create User Group

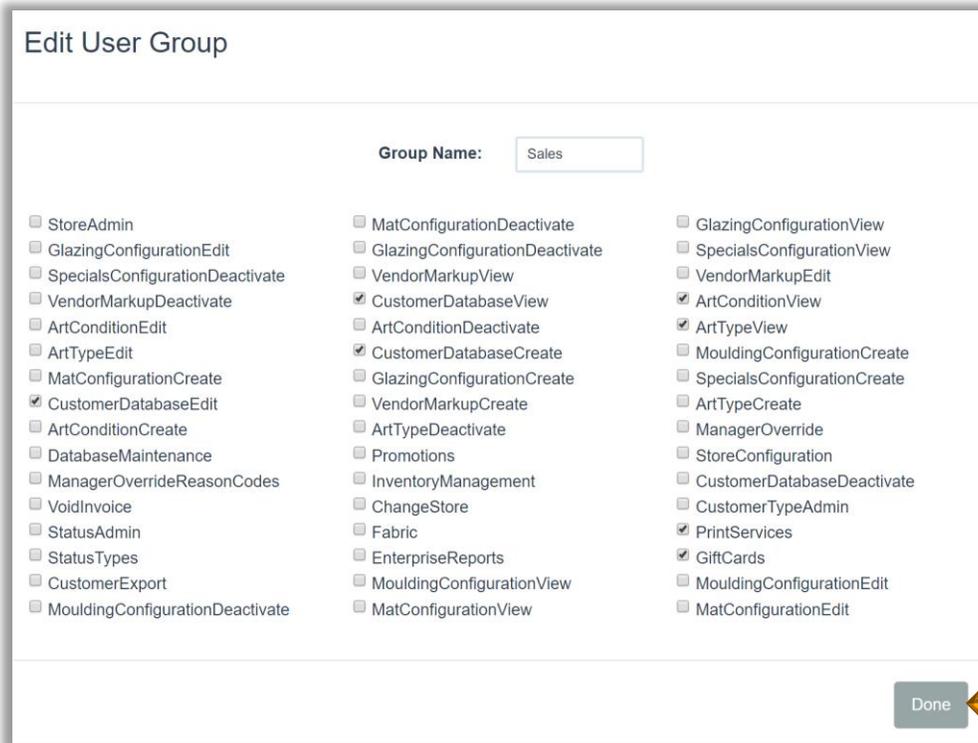
4. The **Sales** Group has now been created.

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



Security – User Group Sales

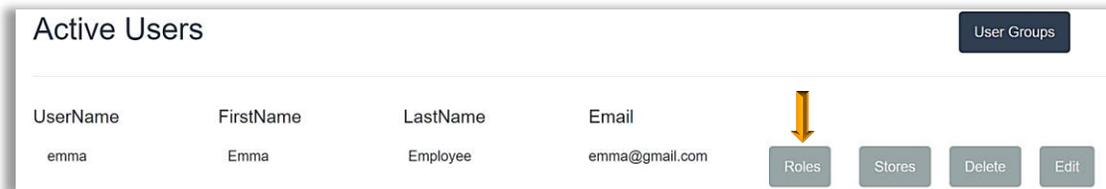
6. Touch/Click the **Field** box to the left of the operations they are allowed to perform. Touch/Click the **Done** button.



Security – Edit User Group

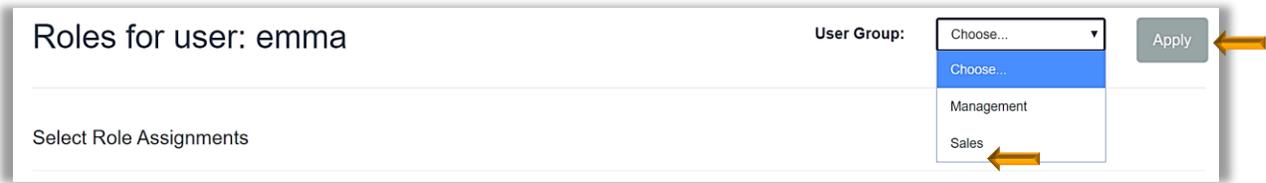
Assign User Group

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**

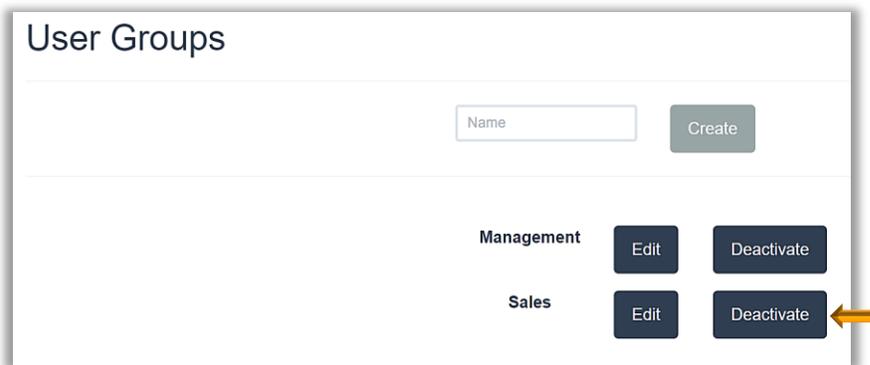


Security – Assign User Group - Sales

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

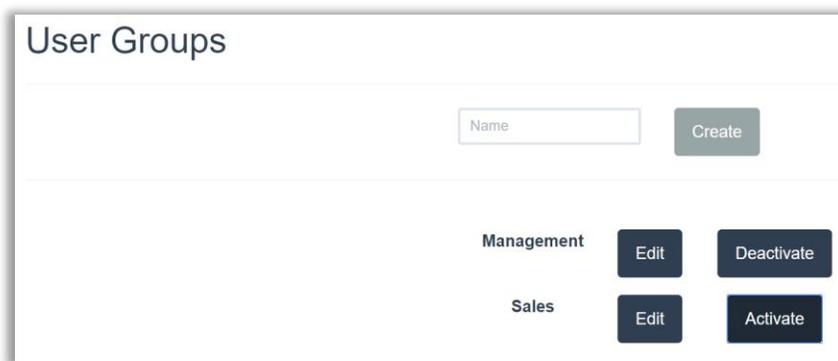
Deactivate/Activate User Group

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.

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

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

Security – Active User

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

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

Security - Change Password

Edit Employee/User Profile

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

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

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

Edit Employee/User Profile

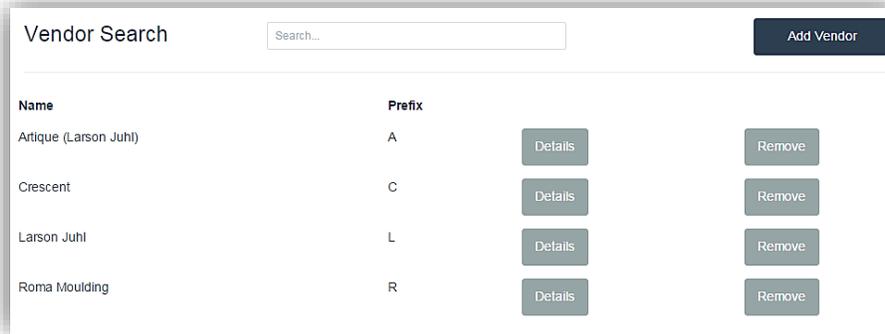
Add/Markup Vendor

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

Add Vendor

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

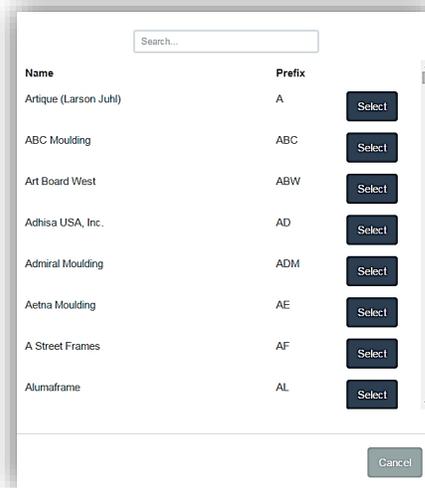
Note: Vendors that are currently in your database are listed on this screen. The program already contains the following vendors: Artique, Larson Juhl, Crescent and Roma.



Vendor Markup – Search/Add Vendor

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

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



Add Vendor Window

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

Touch/Click on desired type.

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

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

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

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

Add Vendor - Account & Default Type

Markups

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

Set Moulding Markups

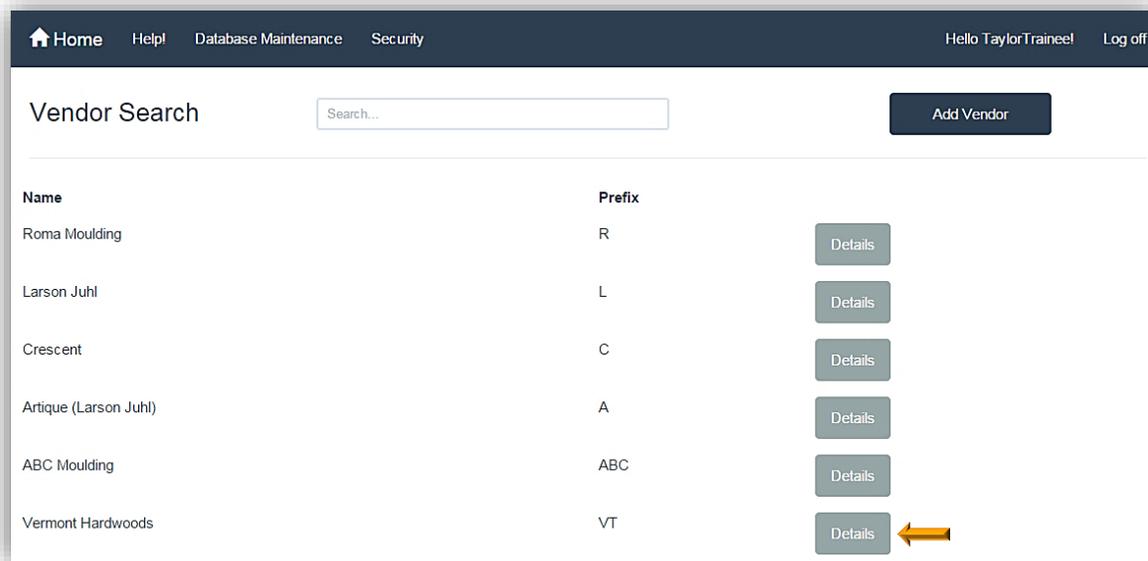
Set moulding markup tables for each vendor or a moulding default markup table across selected vendors that you just added to your database to determine your store's retail cost for each vendor's product line. You will set the markup for each vendor's moulding cut types and the default moulding cut that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

Set Moulding Markup Table

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

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

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



Vendor Markup - Vendor List - Details

- The Markup Table will open on the Chop tab. The following tabs are available: Chop, Join, Length, Cut Fillet, Straight Cut and Wedge. The markup table displayed on the screen does include default markups per minimum and maximum dollar amounts. The default markup amounts will need to be adjusted to reflect your 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

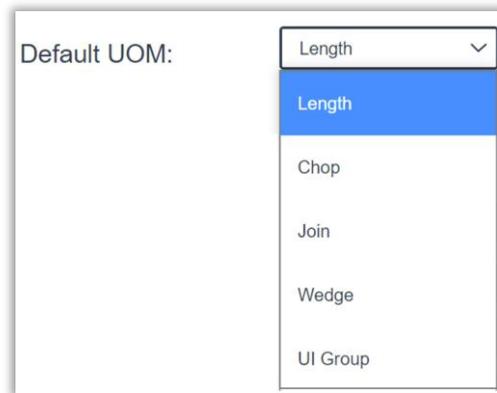
Vendor Details – Default Markup Table

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

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

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

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



13. Touch/Click **Save**.

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

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

Vendor Details for Decor Moulding Apply Default Markup

Moulding
Default UOM: Length ▼

Chop
Join
Length
Wedge
UI Group

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

Add Row

Save

Moulding – Completed Length Tab Markup Table by Vendor

Set Default Moulding Markup Table to Selected Vendors

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

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

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

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

Name	Prefix
Default Mat	Select
Default Moulding	Select

Add “Default Vendor”

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

Name	Default Moulding
Account Number	123456
Default Moulding Type	Length

Add Vendor Account

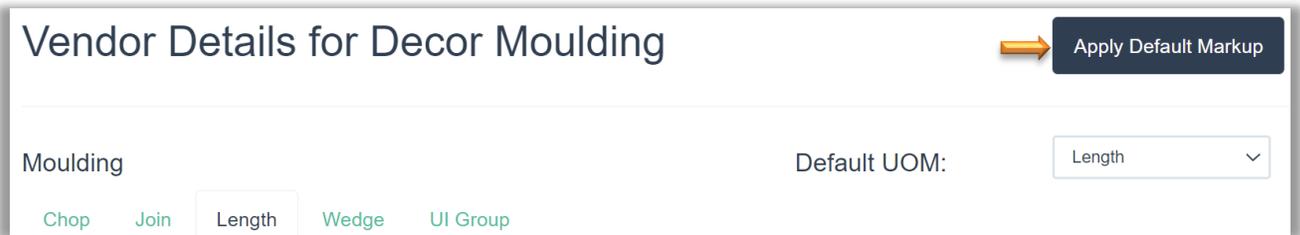
5. Follow the Set Moulding Markup instructional steps in the previous section.
6. Touch/Click **Save**.

Apply Default Markup to Moulding Vendor

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

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

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



Vendor Details for Decor Moulding

Moulding Default UOM: Length

Chop Join Length Wedge UI Group

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

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

Set Mat Markups

Set mat markup tables for each mat vendor or a mat default markup table across selected vendors that you just added to your database to determine your store's retail cost for each vendors' product line. You will set the markup for the mat types that you will use in your store. The following mat types 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

Mats Default UOM:

Sheet UI Group

Min Value	Max Value	Markup	Discount	
0.0000	5.0000	5.40	.00	Sheet
5.0001	10.0000	4.60	.00	Sheet
10.0001	15.0000	2.50	.00	UI Group
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

Apply Default Markup

Add Row

Save

Crescent Mat Markup Table - Sheet

Set Default Mat Markup Table to Selected Vendors

Set one markup table to apply to selected mat vendors.

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

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

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

Apply Mat Default Markup Table

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

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

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

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

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

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

Set Fabric Markups

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

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

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

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

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

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

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

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

Vendor Details for Raphaels Master Source Fabric

Fabric

Fabric

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

Add Row

Save

Fabric Markup Table

Apply Fabric Default Markup Table

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

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

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

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

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

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

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

Moulding

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

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

Select Vendor -Search - Details

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

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

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

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

The screenshot shows a mobile application interface for searching moulding products. At the top, there is a 'Select Vendor' dropdown menu set to 'Roma Moulding', a 'Moulding Search' text input field containing 'ramino', and two buttons: 'Create Moulding' and 'Add Vendor'. Below this is a table of search results with columns for Name, Description, and UPC. Each row has a 'Details' button to its right. A vertical scrollbar is on the right side of the table. At the bottom right, it says 'Page: 1' with a right-pointing arrow.

Name	Description	UPC	
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

Moulding Search

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

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

Moulding Details

<table style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 150px;">Name</td><td><input type="text" value="R100153"/></td></tr> <tr><td>Description</td><td><input type="text" value="Ramino 2 1/2 Mahogany Lacquer with Gol"/></td></tr> <tr><td>Vendor</td><td><input style="border-bottom: 1px solid #ccc;" type="text" value="Roma Moulding"/></td></tr> <tr><td>Width</td><td><input type="text" value="2.5"/></td></tr> <tr><td>Height</td><td><input type="text" value="0"/></td></tr> <tr><td>UPC</td><td><input type="text" value="0"/></td></tr> <tr><td>Bin</td><td><input type="text"/></td></tr> <tr><td>Moulding Type</td><td><input style="border-bottom: 1px solid #ccc;" type="text" value="Moulding"/></td></tr> <tr><td>Use in Art Cloud</td><td><input type="checkbox"/></td></tr> </table>	Name	<input type="text" value="R100153"/>	Description	<input type="text" value="Ramino 2 1/2 Mahogany Lacquer with Gol"/>	Vendor	<input style="border-bottom: 1px solid #ccc;" type="text" value="Roma Moulding"/>	Width	<input type="text" value="2.5"/>	Height	<input type="text" value="0"/>	UPC	<input type="text" value="0"/>	Bin	<input type="text"/>	Moulding Type	<input style="border-bottom: 1px solid #ccc;" type="text" value="Moulding"/>	Use in Art Cloud	<input type="checkbox"/>	<table style="width: 100%; border-collapse: collapse;"> <tr><td>Chop Cost</td><td>\$</td><td><input type="text" value="19.63"/></td></tr> <tr><td>Join Cost</td><td>\$</td><td><input type="text" value="0.00"/></td></tr> <tr><td>Length Cost</td><td>\$</td><td><input type="text" value="12.60"/></td></tr> <tr><td>Other Cost</td><td>\$</td><td><input type="text" value="0"/></td></tr> <tr><td>Chop Markup</td><td></td><td><input type="text" value="2"/></td></tr> <tr><td>Join Markup</td><td></td><td><input type="text" value="3.09999990463257"/></td></tr> <tr><td>Length Markup</td><td></td><td><input type="text" value="3"/></td></tr> <tr><td>Other Markup</td><td></td><td><input type="text" value="3"/></td></tr> </table>	Chop Cost	\$	<input type="text" value="19.63"/>	Join Cost	\$	<input type="text" value="0.00"/>	Length Cost	\$	<input type="text" value="12.60"/>	Other Cost	\$	<input type="text" value="0"/>	Chop Markup		<input type="text" value="2"/>	Join Markup		<input type="text" value="3.09999990463257"/>	Length Markup		<input type="text" value="3"/>	Other Markup		<input type="text" value="3"/>
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Length Markup		<input type="text" value="3"/>																																									
Other Markup		<input type="text" value="3"/>																																									

Moulding Details

Create Store Moulding

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

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

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

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

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

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

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

Create/Edit Store Moulding	
Name	LFFB175
Description	W1 FOUNDRY FLAT BRASS 1 3/4
Vendor	Larson Juhl
Width	1.75
Height	0
UPC	720472179788
Bin	
Moulding Type	Moulding
Use in Art Cloud	<input type="checkbox"/>
Chop Cost	\$ 7.80
Join Cost	\$ 10.86
Length Cost	\$ 5.05
Other Cost	\$ 10.86
Chop Markup	2
Join Markup	2
Length Markup	3.59999990463257
Other Markup	3

Create Store Moulding

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

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

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

Show Deactivated Mouldings

Page: 1

Store Moulding Inventory List

Edit Store Moulding

Edit moulding details.

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

Activate – Deactivate Store Moulding

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

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

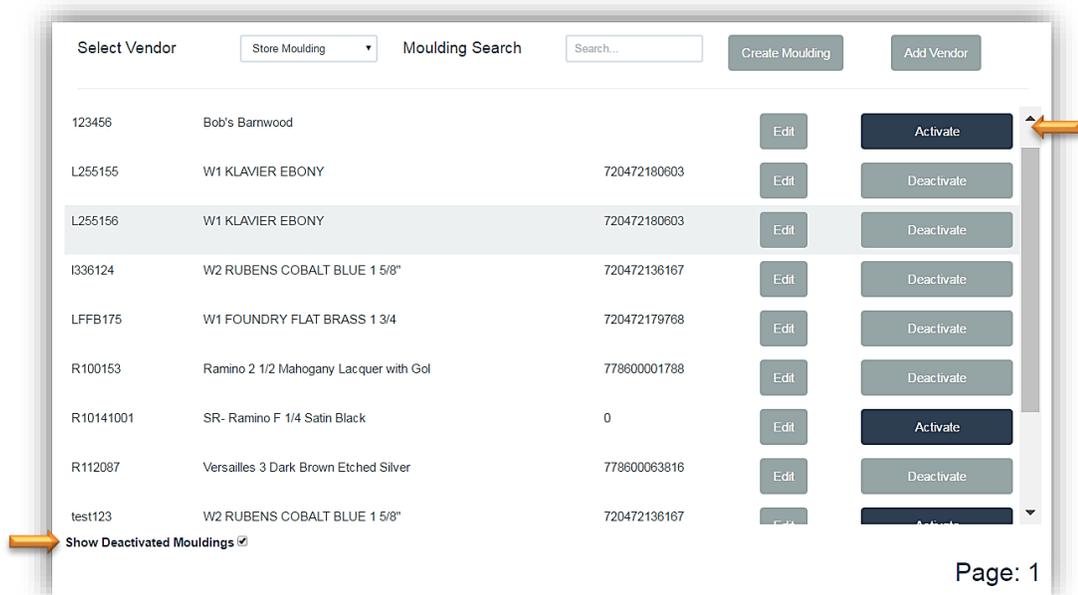
Note: Cannot use in a write order when deactivated.

Display Deactivated Mouldings

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

Activate Store Moulding

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



Add Moulding Vendor

Refer to instructions in the Vendor Markup section.

Mat

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

1. Touch the Mat button on the Main Menu.

Select Vendor - Search - Details

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

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

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

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

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

The screenshot shows the 'Mat Search Screen' interface. At the top, there is a 'Select Vendor' dropdown menu set to 'Crescent', a 'Mat Search' input field containing 'red', and two buttons: 'Create Mat' and 'Add Vendor'. Below this is a table with columns for 'Name', 'Description', and 'UPC'. Each row in the table has a 'Details' button to its right. A vertical scrollbar is on the right side of the table. At the bottom right, it says 'Page: 1' with a right-pointing arrow.

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

Mat Search Screen

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

5. The Mat Details screen will display the following:

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

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

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

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

Mat Details Screen

Create Store Mat

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

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

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

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

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

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

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

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

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

Create Store Mat

- d. Touch/Click **Save** button.
- e. New mat item name and description will display.

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

Name	Description	UPC
WM5555	Wedding White Signature	

Store Mat Inventory List

Edit Store Mat

Edit mat product details.

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

Add Mat Vendor

Refer to instructions in the Vendor Markup section.

Fabric

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

Select Vendor - Search - Details

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

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

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

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

Fabric Search Screen

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



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

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

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

Fabric Details Screen

Add Fabric Vendor

Refer to instructions in the Vendor Markup section.

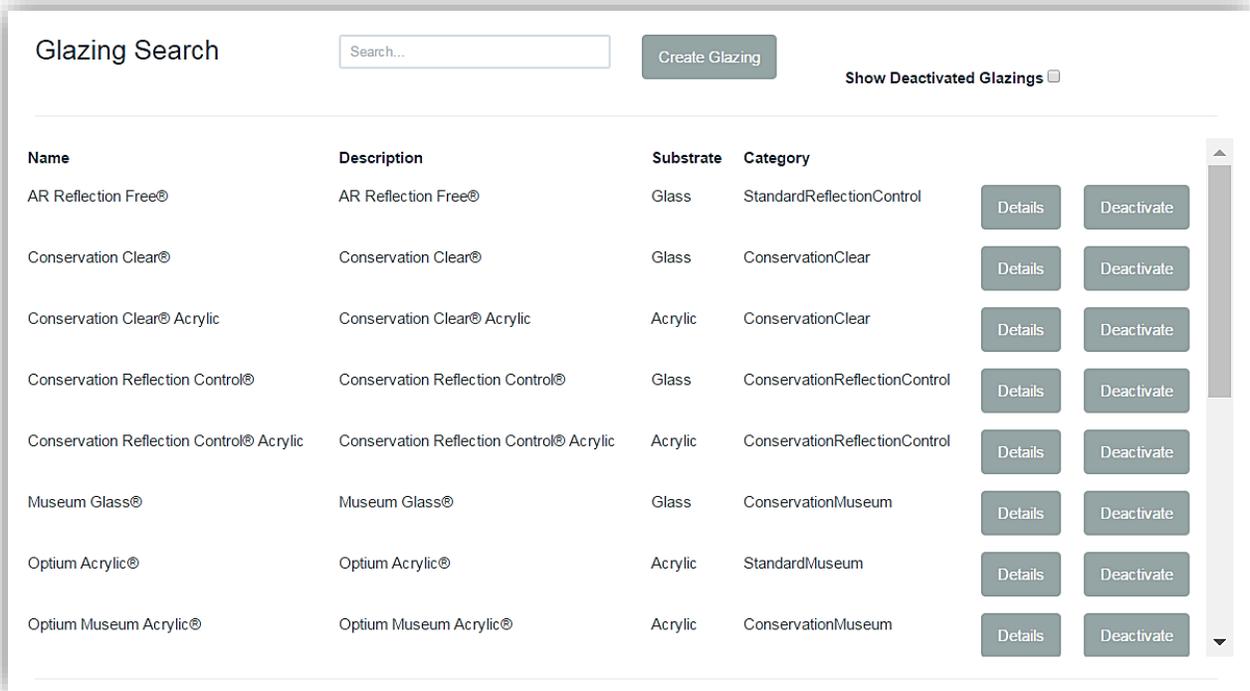
Glazing

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

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

Search

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



Glazing Search Screen

Set Glazing Markups

Set glazing markups for glass, mirror and acrylic.

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

Demo Example: Conservation Clear.

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

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

Demo Example: Lite

Note: The costing method can be different for different types of glazing. The demo example is pricing the Conservation Clear by Lite price. It is not necessary to complete the markup tables for each costing method.

4. **Minimum Retail Amount:** Touch/Click the field and type minimum glazing retail amount. **Demo Example: \$20.00**
5. **Default Costing Method:** Touch/Click the drop-down arrow and Select **Lite, United Inch, Square Inch or Square Meter**. The workorder will calculate the retail price based on the default costing method selected and the corresponding markup table.

Glazing Details

<p>Name <input style="width: 90%;" type="text" value="Conservation Clear®"/></p> <p>Substrate <input style="border-bottom: 1px solid #ccc;" type="text" value="Glass"/></p> <p> Costing Method <input style="border-bottom: 1px solid #ccc;" type="text" value="Lite"/></p> <p> Min Retail Amount <input style="width: 90%;" type="text" value="\$20.00"/></p>	<p>Description <input style="width: 90%;" type="text" value="Conservation Clear®"/></p> <p>Category <input style="border-bottom: 1px solid #ccc;" type="text" value="ConservationClear"/></p> <p>Default Costing Method <input style="border-bottom: 1px solid #ccc;" type="text" value="Lite"/></p>
--	---

Create/Edit Existing Glazing Markup Table

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

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

Edit Existing Markup Table

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

2. Touch/Click **Width** field. To edit the Width backspace current data to delete. Type new height measurement.
3. Touch/Click **Cost** field. To edit the Cost backspace current data to delete. Type new Cost.

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

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

(Product Cost x Markup = Retail Price)

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

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

Add New Glazing Markup Table

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

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

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

2. Touch/Click Sku field. Type **SKU**. (Optional)
3. Touch/Click **Height** field. Type height measurement.
4. Touch/Click **Width** field. Type width measurement.
5. Touch/Click **Cost** field. Type cost amount.
6. Touch/Click **Markup** field. Type markup amount.
7. Touch/Click **Add Row** and **Repeat steps 2 – 5** if needed.

8. Touch/Click **Save** button.

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

Glazing Details

Name: Description:

Substrate: Category:

Costing Method:

Pricing

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

Set Glazing Vendor Markups

Create Glazing

Add your own glazing and mirrors.

1. Touch/Click on the **Create** button.
2. Touch/Click **Name** field: Type Name of item.
3. Touch/Click **Substrate** drop down arrow. Select **Glass, Mirror or Acrylic**.
4. Touch/Click **Cost Method** drop down arrow. Select **Lite, United Inch, Square Inch, or Square Meter**.
5. Touch/Click **Description** field: Type description of item.
6. Touch/Click **Category** drop down arrow. Select category.
7. Touch/Click **Add Row**.
8. Touch/Click **Height, Width, Cost** and **Markup** fields to **add data**.

- Repeat steps 7 and 8 to add additional line items to the table.
- Click on the **Save** button when complete.

SKU	Height	Width	Cost	Markup	Retail
	18	24	\$ 50.00	2	\$ \$100.00
	24	36	\$ 100.00	2	\$ \$200.00

Create Glazing Screen

Deactivate – Display Deactivated - Activate Glazing

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

- 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)

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

Activate Glazing Type(s)

- 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.

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

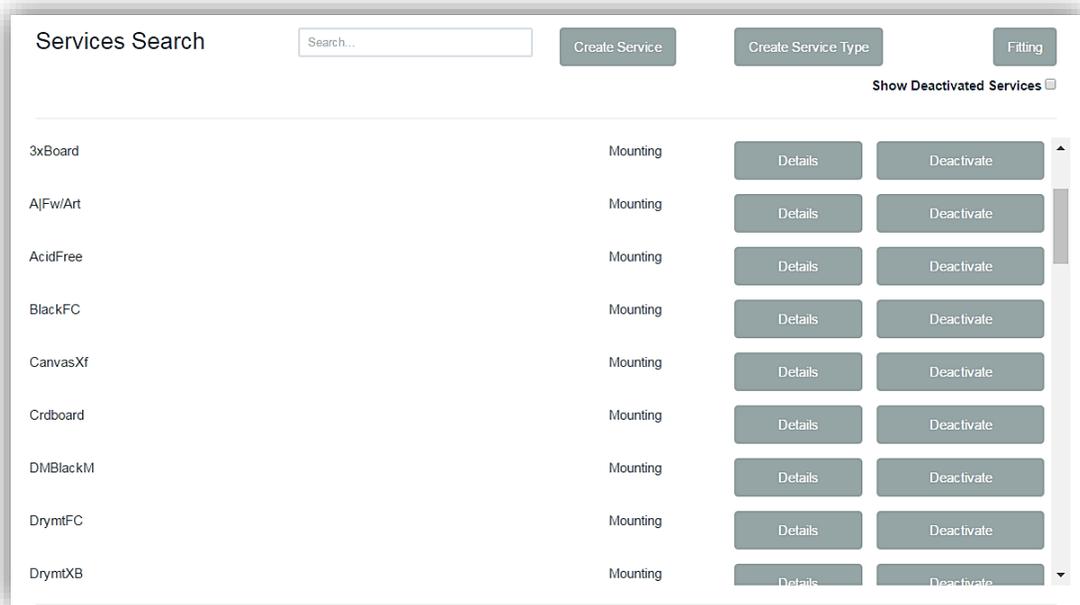
Glazing – Activate/Deactivate

Services - Specials

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

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

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



Services Screen

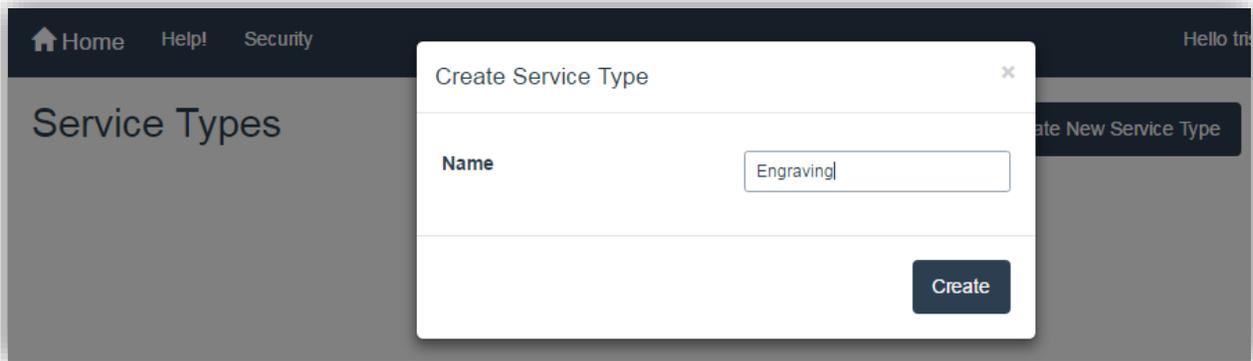
Search

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

Create Service Type

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

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



Create Service Type

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



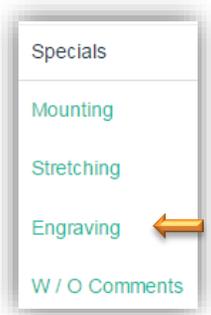
Activate New Service Type

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



Special Type Drop Down List

- 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

- Touch/Click on the **Create Service** button to add your own special.
- Touch/Click into each applicable **Specials Detail** field to **Add Value**.

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

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

Special Details

<p>Name <input style="width: 90%;" type="text" value="# Word/Symbol"/></p> <p>Description <input style="width: 90%;" type="text" value="Fee per Word/Symbol"/></p> <p>Special Type <input style="width: 90%;" type="text" value="Engraving"/></p>	<p>Reminder Message <input style="width: 95%; height: 30px;" type="text"/></p> <p>Unit of Measure <input style="width: 90%;" type="text" value="Inch"/></p>
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<p>Standard</p> <p>Height <input style="width: 90%;" type="text" value="0"/></p> <p>Width <input style="width: 90%;" type="text" value="0"/></p> <p>Labor Cost <input style="width: 90%;" type="text" value="3.00"/></p> <p>Labor Markup <input style="width: 90%;" type="text" value="0"/></p> <p>Labor Costing Method <input style="width: 90%;" type="text" value="Unit"/></p> <p>Material Cost <input style="width: 90%;" type="text" value="0.00"/></p> <p>Material Markup <input style="width: 90%;" type="text" value="0"/></p> <p>Material Costing Method <input style="width: 90%;" type="text" value="Unit"/></p>	<p>Oversize</p> <p>Labor Cost <input style="width: 90%;" type="text" value="0.00"/></p> <p>Labor Markup <input style="width: 90%;" type="text" value="0"/></p> <p>Labor Costing Method <input style="width: 90%;" type="text" value="Unit"/></p> <p>Material Cost <input style="width: 90%;" type="text" value="0.00"/></p> <p>Material Markup <input style="width: 90%;" type="text" value="0"/></p> <p>Material Costing Method <input style="width: 90%;" type="text" value="Unit"/></p>
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Create Services/Specials Details

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.

Specials # Word/Symbol 5 Full Date Monogram - 3 initial

Mounting

Stretching

Engraving

W / O Comments

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.

Fitting

Unit of Measure

Standard

Height

Width

Labor Cost

Labor Markup

Labor Costing Method

Oversize

Labor Cost

Labor Markup

Labor Costing Method

Save

Create Fitting Fee

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

Special Details

<p>Name <input style="width: 100%;" type="text" value="1 HrLbr"/></p> <p>Description <input style="width: 100%;" type="text"/></p> <p>Special Type <input style="border-bottom: 1px solid #ccc; border-right: 1px solid #ccc; border-left: 1px solid #ccc; border-top: 1px solid #ccc; text-align: right; font-size: 0.8em; color: #666; padding-right: 5px; margin-right: 5px;" type="text" value="Special"/> ▼</p> <p>Min Amount Labor <input style="width: 100%;" type="text" value="0"/></p> <p>Min Amount Material <input style="width: 100%;" type="text" value="0"/></p>	<p>Reminder Message <input style="width: 100%; height: 30px;" type="text"/></p> <p>Unit of Measure <input style="border-bottom: 1px solid #ccc; border-right: 1px solid #ccc; border-left: 1px solid #ccc; border-top: 1px solid #ccc; text-align: right; font-size: 0.8em; color: #666; padding-right: 5px; margin-right: 5px;" type="text" value="Inch"/> ▼</p> <p>Use UI grid pricing? <input type="checkbox"/></p> <p>Auto check on new Work Orders? <input type="checkbox"/></p>
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<p>Standard</p> <p>Height <input style="width: 100%;" type="text" value="32"/></p> <p>Width <input style="width: 100%;" type="text" value="40"/></p> <p>Labor Cost <input style="width: 100%;" type="text" value="35"/></p> <p>Labor Markup <input style="width: 100%;" type="text" value="1"/></p> <p>Labor Costing Method <input style="border-bottom: 1px solid #ccc; border-right: 1px solid #ccc; border-left: 1px solid #ccc; border-top: 1px solid #ccc; text-align: right; font-size: 0.8em; color: #666; padding-right: 5px; margin-right: 5px;" type="text" value="Unit"/> ▼</p> <p>Material Cost <input style="width: 100%;" type="text" value="0"/></p> <p>Material Markup <input style="width: 100%;" type="text" value="1"/></p> <p>Material Costing Method <input style="border-bottom: 1px solid #ccc; border-right: 1px solid #ccc; border-left: 1px solid #ccc; border-top: 1px solid #ccc; text-align: right; font-size: 0.8em; color: #666; padding-right: 5px; margin-right: 5px;" type="text" value="Unit"/> ▼</p>	<p>Oversize</p> <p>Labor Cost <input style="width: 100%;" type="text" value="35"/></p> <p>Labor Markup <input style="width: 100%;" type="text" value="1"/></p> <p>Labor Costing Method <input style="border-bottom: 1px solid #ccc; border-right: 1px solid #ccc; border-left: 1px solid #ccc; border-top: 1px solid #ccc; text-align: right; font-size: 0.8em; color: #666; padding-right: 5px; margin-right: 5px;" type="text" value="Unit"/> ▼</p> <p>Material Cost <input style="width: 100%;" type="text" value="0"/></p> <p>Material Markup <input style="width: 100%;" type="text" value="1"/></p> <p>Material Costing Method <input style="border-bottom: 1px solid #ccc; border-right: 1px solid #ccc; border-left: 1px solid #ccc; border-top: 1px solid #ccc; text-align: right; font-size: 0.8em; color: #666; padding-right: 5px; margin-right: 5px;" type="text" value="Unit"/> ▼</p>
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Service/Special Details

Auto Select Special/Service on Work Order Screen

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

Special Details

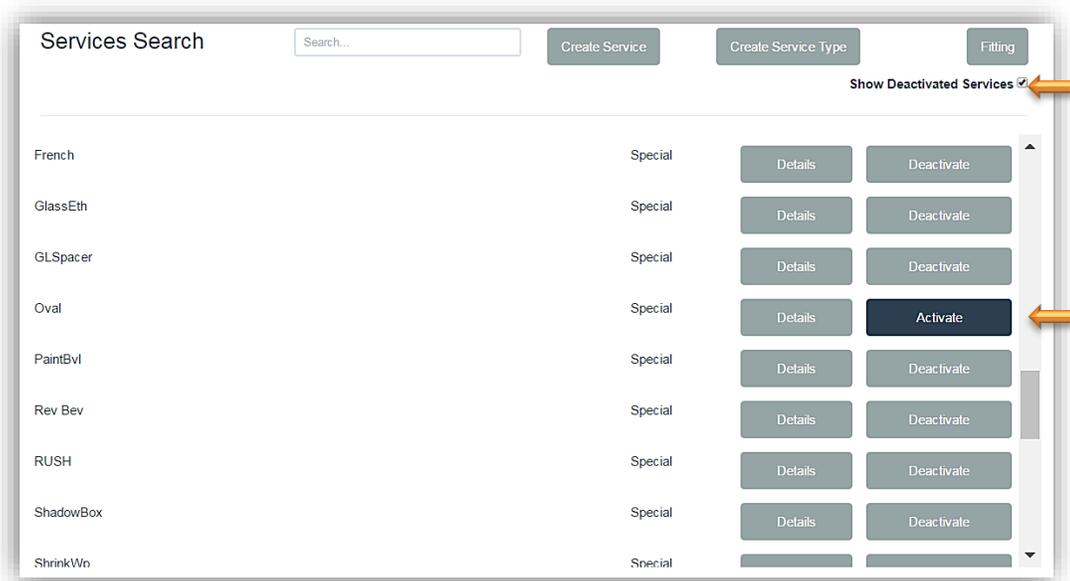
Name	AcidFree	Reminder Message	
Description		Unit of Measure	Inch
Special Type	Mounting	Use UI grid pricing?	<input type="checkbox"/>
Min Amount Labor	0	Auto check on new Work Orders?	<input checked="" type="checkbox"/> 
Min Amount Material	0		

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

Service (Special) Details - Auto Select

Deactivate -- Show Deactivated - Activate Services/Specials

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



Deactivate – Activate – Show Deactivated Services

Art Conditions

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

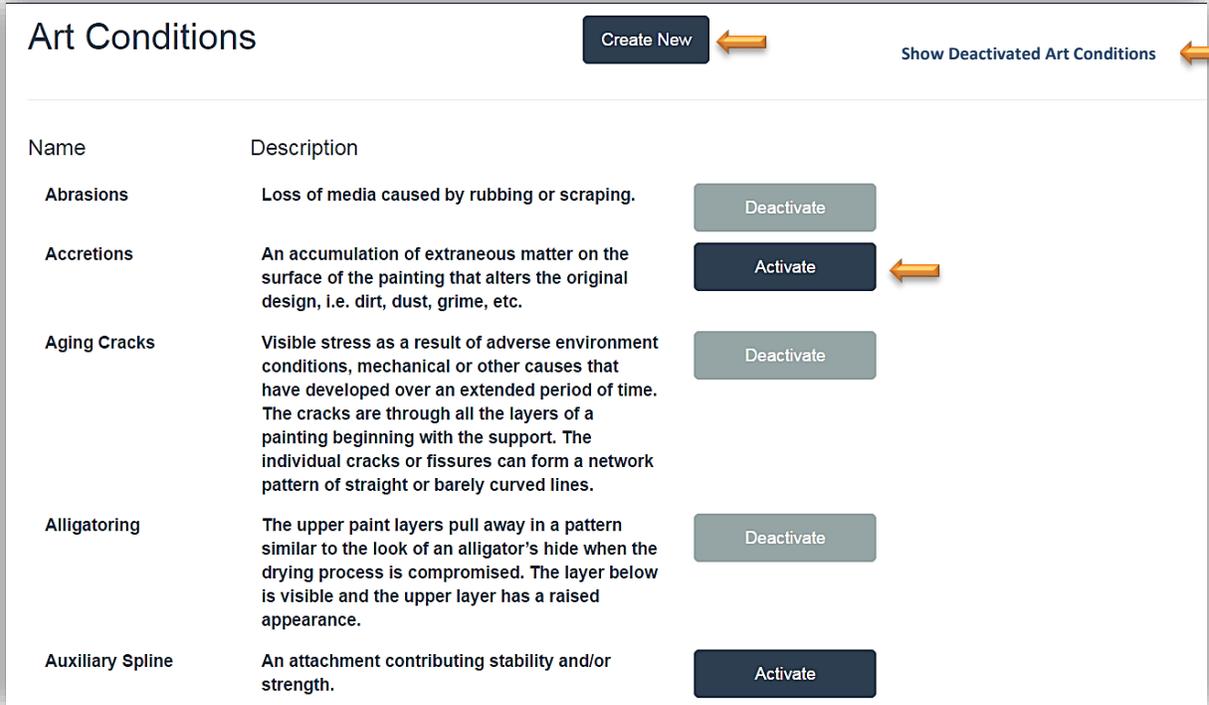
1. Touch/Click on the **Art Conditions** button.

Create New

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

Deactivate – Activate – Show Deactivated

1. 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.



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

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

Art Conditions

Art Types

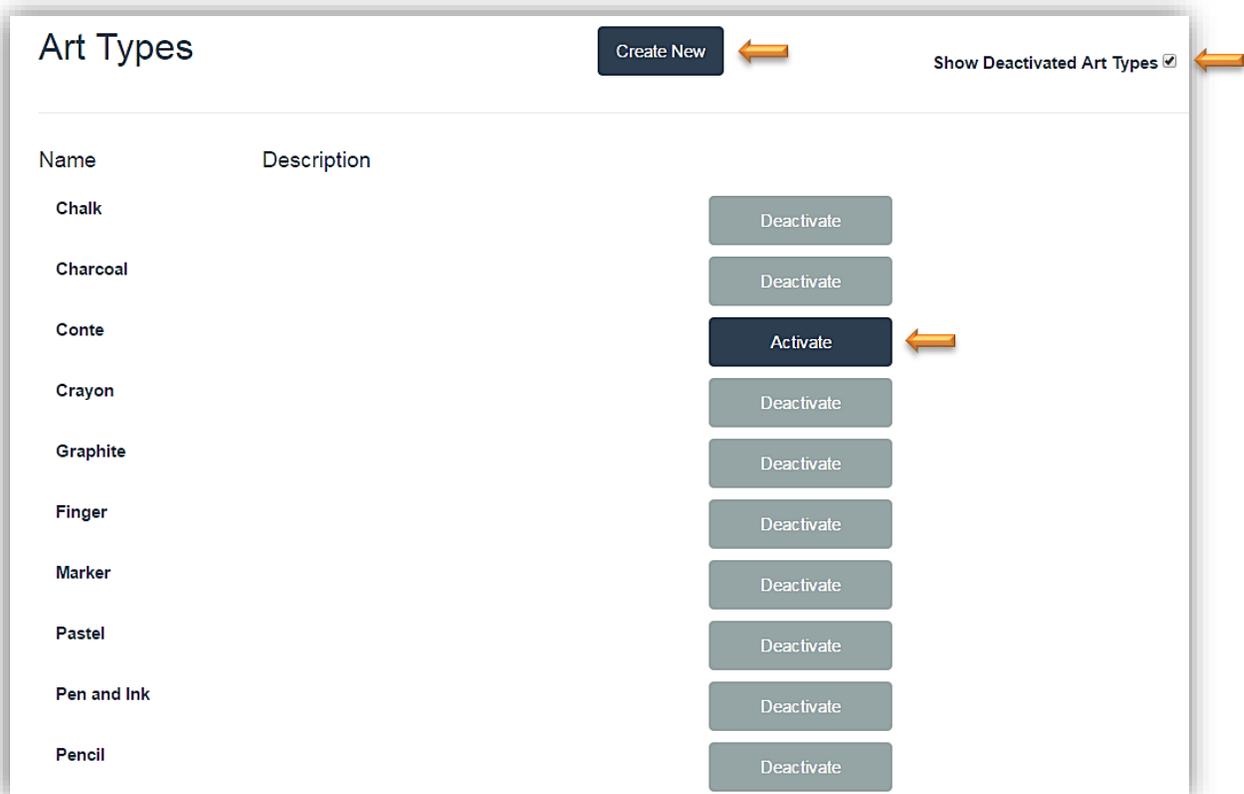
Create New, Activate and Deactivate categories used to note the type of art you are framing in the workorder. Ex: Pastel, Watercolor, Pen and Ink, etc.

Create New

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

Deactivate – Activate – Show Deactivated

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



Art Types

Inventory – Art and Gallery Items

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

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

Create New

Demo Example: Art Print

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

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

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

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

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

Add / Edit Inventory Inventory Type: Art Item

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

Create Another?

Add Inventory Item - Art

Add / Edit Inventory Inventory Type: Finished Product

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

Create Another?

Add Inventory – Finished Product

Add / Edit Inventory Inventory Type: Supply

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

Create Another?

Add Inventory - Supply

Manage Inventory Levels

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

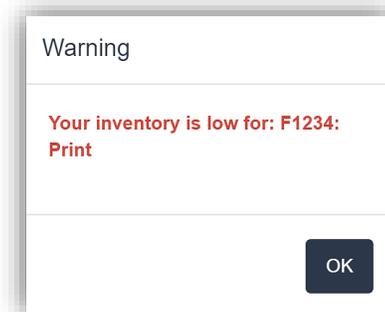
Decrement Inventory:

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

Warn When Inventory Falls Below Set Threshold

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

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



Search - Edit – Deactivate – Activate Inventory Item

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

Search

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

Edit

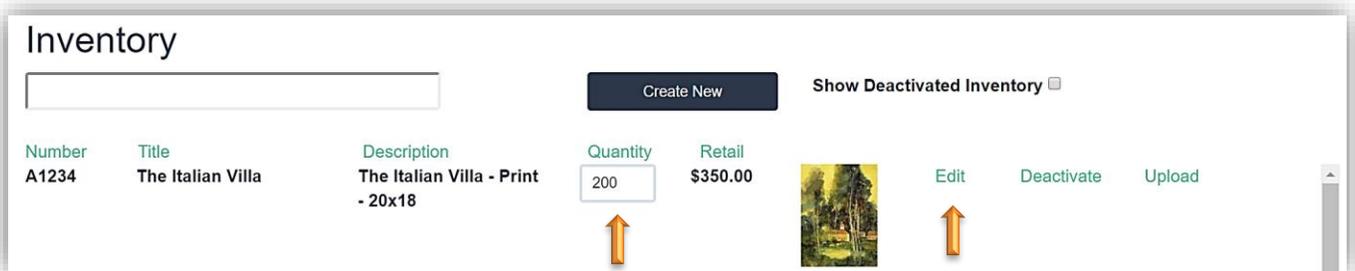
Change/ Add information in the current inventory item record or edit inventory quantity on the inventory main menu.

Edit Item Inventory Record

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

Edit Quantity on Inventory Main Menu.

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

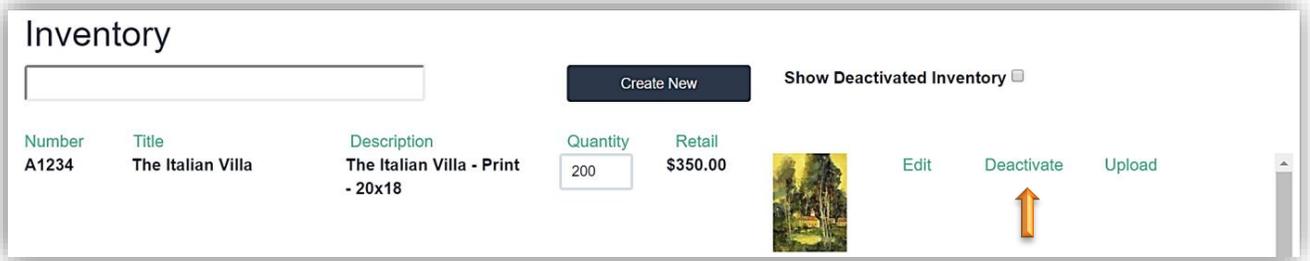


Inventory - Edit Record/Quantity

Deactivate

Remove item from your store inventory.

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



Inventory Menu – Deactivate Item

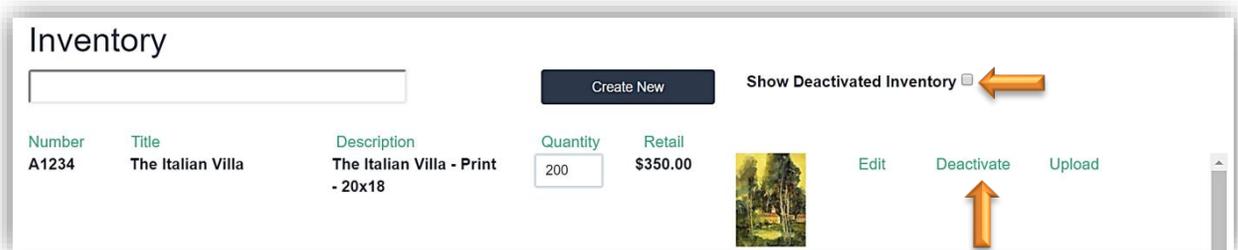
Activate

Add a previously deactivated item back into your store inventory.

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

Show Deactivated Inventory

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



Inventory Menu – Activate Item

Upload Inventory Art Image

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

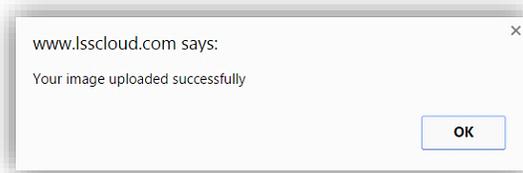
1. On the main Inventory Menu screen. Touch/Click on the **Upload Image** option on the art line item that you would like to upload the image.

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

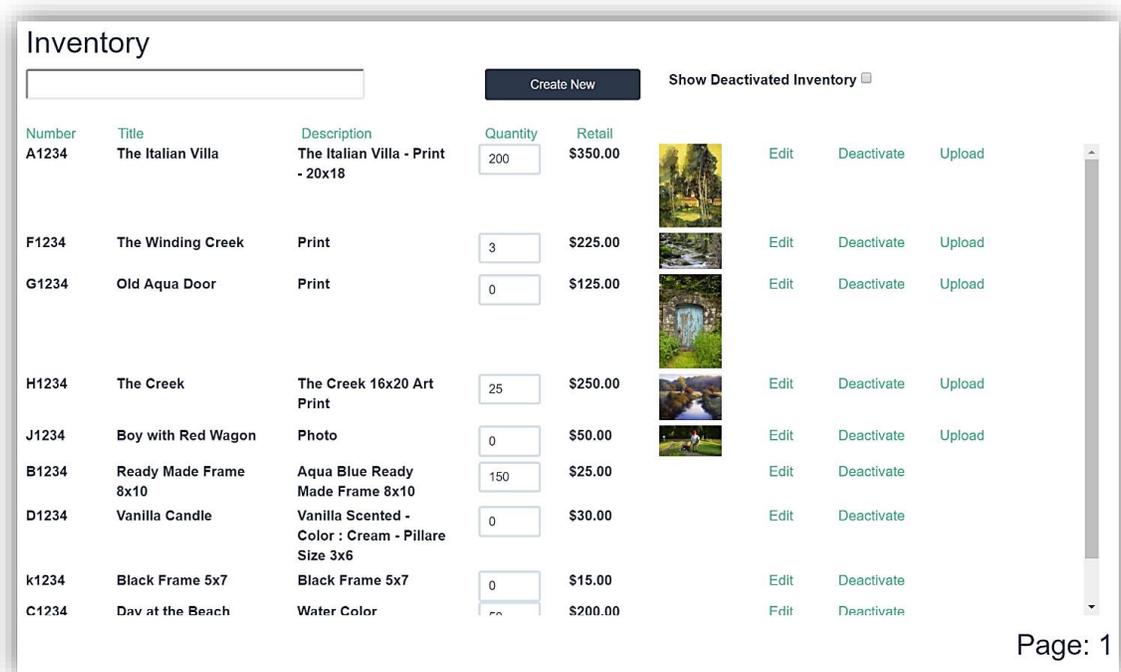
2. The Pictures/Photo Library window will open on your computer/tablet. Touch/Click the desired image/photo/jpeg. It will be necessary to Click the Open button in the window on a desktop.

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

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



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



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

Page: 1

Inventory Main Menu Screen

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