LSS Cloud Workorder – Workorder/ Invoice Quick Start Guide

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

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

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

Screen Navigation Tips

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

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

3. Touch /Click the **Art Condition** button. Touch/Click on a **Condition Type** in the pop up list to specify the condition of the art. Drag scroll bar to view additional art conditions. Touch/Click the **OK** button.

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

4. Touch/Click the **Art Type** button. Touch/Click on the **Medium to Specify Art Type** in the pop up list. Touch/Click the **OK** button.
   Tip: Can select more than one art type. To remove selection, click on the previous selected art type.

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

   To **Change Due Date**.

   - Touch/Click Due Date to pull up calendar.
   - Touch/Click new date/day.
   - Touch/Click Arrows to the right and left of the month to access the previous/next month.


6. **Image Size**
   - Touch/Click Height field and **Type in the Height Measurement**. **Example: 20'**
   - Touch/Click Width field and **Type in the Width Measurement**. **Example: 18'**

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

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

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

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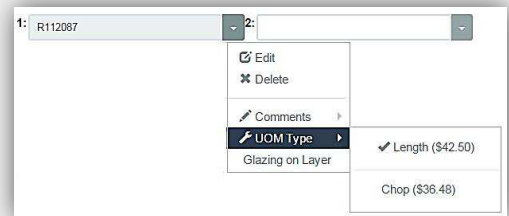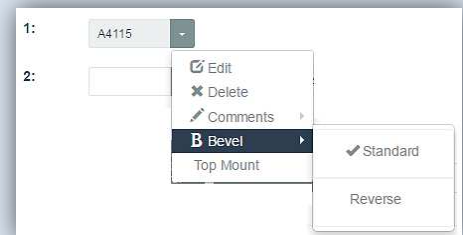

Moulding Options

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

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

   Tips
   - **Desktop Users:** Type number of inches in the Top reveal field then press the tab key to auto fill the reveal to the same number of inches for the Bottom, Left and Right.
   - **Tablet Users**: Type number of inches in the Top reveal field then touch a blank area of the workorder screen to auto fill the reveal to the same number of inches for the Bottom, Left and Right.
   - To **Edit** any of the Top, Bottom, Left or Right reveals. Touch/Click into field, backspace current number to delete and type new measurement into the field.

11. Touch/Click on the **Mat** field. Type **Mat Item Number**. *Each Mat field has the available Options: Edit – Delete – Comments – Bevel – Top Mount. Touch/Click on the mat **Field Drop Down Arrow** to access.*

Mat Options

12. A 2nd Mat/Fillet field will populate. Touch/Click **2nd field** and **type the next Mat/ Fillet item number if applicable**. If the field contains a **Fillet** the following **Options** are available: Edit – Delete – Comments. Touch/Click on **Field Drop Down Arrow** to access. The workorder will take unlimited mat/fillet item numbers.
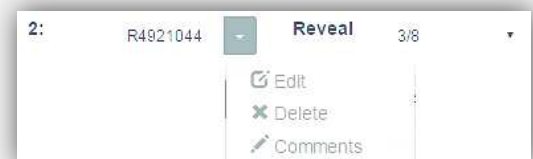
Fillet Options

13. Select **Glazing**
   - The program defaults to TruVue Museum glazing.
   - To select preferred TruVue glazing type other than Museum. Click/Touch one of the following glazing types: **Conservation Clear Acrylic, Conservation Reflection Control, Conservation Clear or No Glazing.**
   - Touch/Click on the **Other Glazing** drop down field arrow located under the No Glazing button to select a glazing type that is not listed on the workorder screen.

14. Select corresponding *Additional labor* and *Material Costs* under the **Specials, Mounting and Stretching** tabs.
    - Touch/Click the *Tab*.
    - Touch/Click in the *Field* adjacent to the preferred Labor/Material option to select.
    - If the *Quantity* is greater than one, Touch/Click on the quantity up/down field arrows to select desired quantity.

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

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

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

Fitting	On	$28.28

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

    a. Touch/Click on *Art +* in the Totals column.
    b. Type the art's *Item Number A1234* into the first field.
    c. **Note:** *If unsure of the art item number touch/click the Browse Art button to list all products listed under the art category in your store inventory. Touch/Click the Select button on the appropriate line item.*
    d. Type *Quantity* 1.
    e. Unit Price $250.00 will auto fill with the price that was previously programed.
    f. Touch/Click the *OK* button.

Add Art to Workorder Window

18. Add a *Miscellaneous $ Amount* to the workorder.

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

        Note: Not used in example.

Misc. Amount Entry

19. Touch/Click on *Discount +* at the bottom of the Totals column to apply a *Discount, Promotion or Manager Override.*
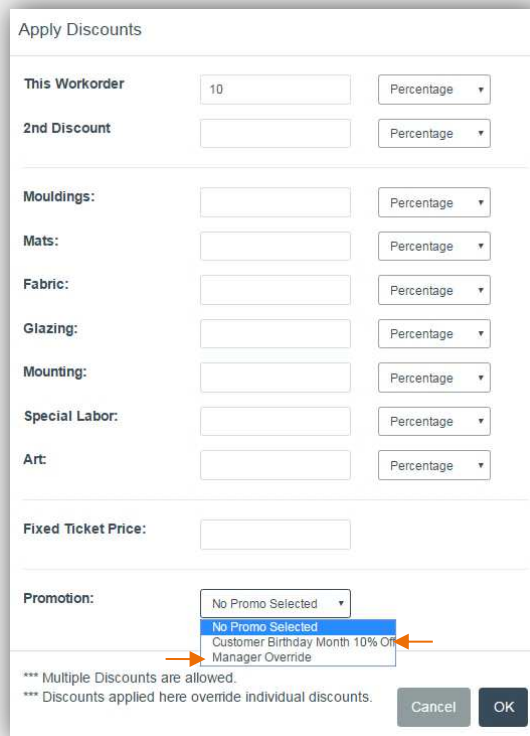
- *Discount: $ or %*

    a. Identify the *Category Line Item* you would like to discount.
    b. Type *the $ amount or % amount discount* in the field to the left of the discount type.
    c. Touch/Click the *Discount Type* drop down field arrow on the selected category row.
    d. Touch/Click on the type of discount you would like to apply: *Percentage or Fixed Amount.*
    e. **Example Workorder 10% Discount on Entire Workorder:** Type *10* into the *Entire Ticket* field. Touch/Click the *Discount Type* drop down. Touch/Click *Percent.*

- *Promotion*

    Note: Promotion(s) must be created previously under the Promotion button on the Home screen
    a. Touch/Click the *Promotion* drop down list.
    b. Touch/Click the *Promotion Type* in the list.
    c. *Example* shown right in discount window is *Customer Birthday Month* which was created to give the customer a 10% discount.
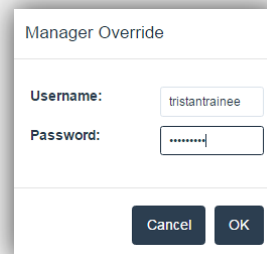   d. Touch/Click *OK*.
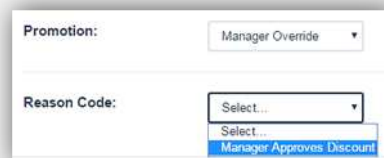
Apply Discount Window

Manager Override

    Note: Reason(s) must be created previously under the Manager Override button on the Home screen.
a. Touch/Click the *Promotion* drop down list.
b. Touch/Click *Manager Override* in the drop down list.
c. Touch/Click *Reason Code* in the drop down list.
d. Touch/Click *OK*.
e. If the employee does not have Manager Override authority they will receive a prompt that requires an Authorized User Name and Password login.
f. Authorized User: Type Username and Password. Touch/Click Ok button.

Select Manager Override Reason

Manager Login

Note: The Discount/Promotion/Manager Override applies to the current workorder only. Additional workorders and invoice items must be discounted individually. Multiple discounts are allowed. Entire Ticket and Fixed Ticket Price discount will override individual discounts.

20. The following options are now available:
   a. **Add To Invoice**: Touch/Click this button to proceed with the workorder.
   b. **Clear:** Touch/Click this button to clear workorder screen. You will not be able to recover workorder.
   c. **Upload Image:** Coming Soon!

Workorder Screen – Arrows with *numbers represent instructional steps.*

Create Invoice

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

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

21. When you Touch/Click the Add to Invoice button the Gray Invoice window will display above the workorder screen. Currently the invoice reflects our "Italian Villa" **custom workorder on line 1**.

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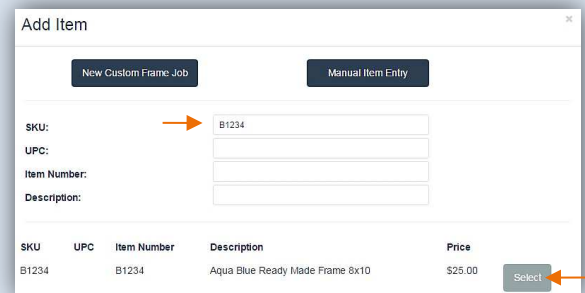
22. Touch/Click **Add Item** button.

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

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

24. Add **Art/Gift** item.

    - *Workorder Example: 8x10 Ready-Made Frame*
    - Touch/Click and complete one of the following fields to search and add your item to the invoice; **SKU, UPC, Item Number or Description**.
    - Touch/Click the **Sku field** and type **B1234**. Products will populate in the list below that contain the same digit/letter that you are typing into the field. The data you enter into the field must match the inventory item record you created.
    - Touch/Click on the **Select** button on the line item that you would like to add to the invoice.
    - The Frame will list in the invoice window on **Line 2**.

Add Item

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

    Example: Shipping Charge: $20.00
    a. Touch/Click **Add Item** button in the Invoice window.
    b. Touch/Click on the **Manual Item Entry** button in the Add Item window.
    c. **Note**: This will return you to the Blue Invoice Window to manually type the item's info on line 3.
    d. Touch/Click Description field to type "**Shipping Fee**" in the **Description Name**.
    e. Touch/Click the Unit Price Field to type **Price ($20.00)** of item.
    f. Touch/Click Unit Discount field and enter $ Discount Amount if applicable.

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

26. **Tax Exempt**: Activated (Represented by a check mark in the field box.) or De-activated (Represented by a blank field box.) Touch/Click Tax Exempt field box to Activate or Deactivate. If the Tax ID has been previously added to the customer's profile the Tax Exempt field will automatically be activated and noted with a check mark.

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

    a. Inventory Items and Manually Entered Item lines: Touch/Click into Field to Edit. The only fields eligible for editing are white in color.
    b. Custom Frame Workorder: Quantity can be adjusted on the line item. The workorder will display in the workorder screen below the invoice window. Complete necessary changes. Touch/Click the Update Invoice button located at the bottom of the Totals column, and to the left of the Clear button to save changes.
    c. *Note: To edit Description or Image Size, Touch/Click into field to change data. To edit Moulding or Mats, Touch/Click the field drop down arrow and select the option needed to complete edit. To edit Art Condition/Type, Glazing and Labor Types, Touch Click selection to select/de-select.*

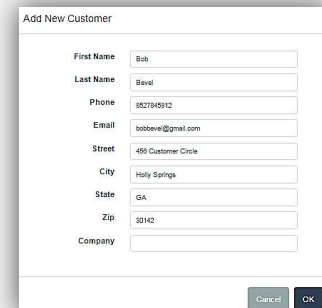28. **Delete line:** Touch/Click ***Delete*** icon on the line item you would like to delete.

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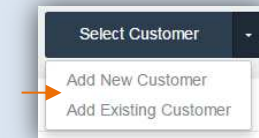
Select Customer Drop Down Menu

30. New Customers: Touch/Click ***Add New Customer***: Click/Touch fields to type ***First, Last Name, Phone, Email, Street, City, State and Zip***. Touch/Click ***OK.***
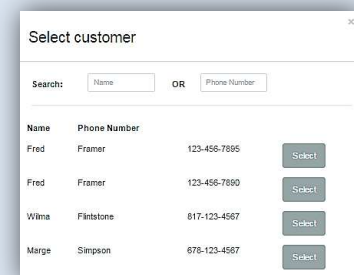
    Note: Additional customer information can be added or edited in the customer's profile under the ***Customer Database*** *button at any time.*


Add New Customer Profile Window

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

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

Select Existing Customer Window

32. Customer's name will display in the upper right corner of the invoice window.
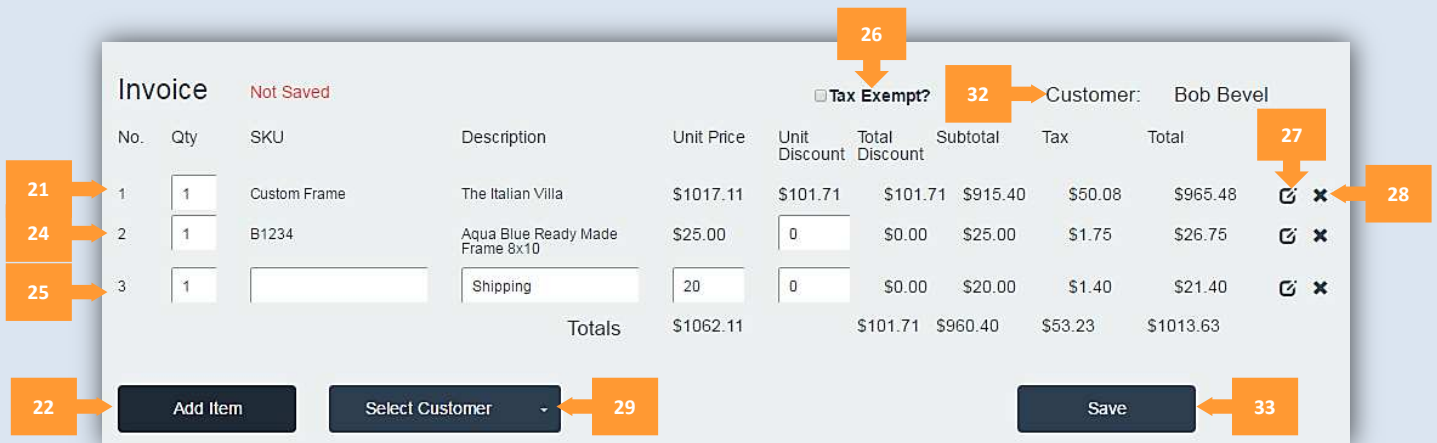
Invoice Window – *Arrows with numbers represent instructional steps.*

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

34. The following popup window will appear. Would you like to save this as a **Quote or Live** Invoice?
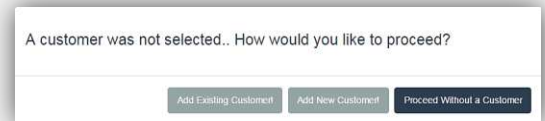
- Touch/Click the *Quote button to Save the Invoice and Print the Quote.*
- Touch/Click *Invoice to proceed to the Accept Payment screen.*
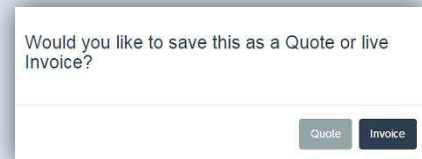
Save the Invoice

*Note: If you Touch/Click the **Quote or Invoice** button, without Selecting/Adding the Customer, you will receive the following popup window. Touch/Click one of the following option buttons.*

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

Add/Select Customer Prompt

35. The following popup window will appear. Would you like to take payment on this order?

- Touch/Click the **No** button to Save the Invoice/Workorder without Payment.
- ***Note:*** *You will return to the Home screen, but the invoice will be Saved.*
- Touch/Click the **Yes** button to Save the Invoice and Accept Payment.
- ***Example Workorder***: *Click Yes.*
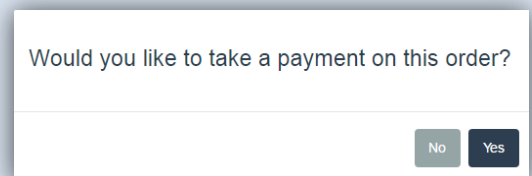
Take Payment On Order Popup

Accept Payment

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

- Invoice #
- Subtotal: Before Tax
- Tax
- Discount: Discount amount applied to the invoice.

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

36. Type applicable Payment Amount(s) in the Pending Payment Field(s).
    - *Example Workorder/Invoice: Type $894.04 in the Pending Payment field for Invoice 174.*

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

Invoice Line Items

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

OK

Invoice Line Item Details

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

Payment Types

39. **Cash**

40. **Check**

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

42. *Workorder Example:* **Cash**
    - Type in **Payment Amount Received**.
      Note: *If the customer is paying on multiple invoices: Touch/Click the Pending Payment field on the next line item that you would like to apply payment.*
    - Click/Touch **Payment Type** button: Cash
      Note: *If the payment type is cash and the amount received from the customer exceeds the total payment due, enter exact amount received into the pending payment field, to display the amount of cash due back to the customer on the screen.*
    - The line item in orange font to the right of the Remove button will display the, payment type received, today's date and payment amount.

43. There is the opportunity to Touch/Click the **Remove** button if the wrong tender type was selected. If selected, the pending payment amount must be entered and a new tender type selected.

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

45. **Payment History:** Displays customers previous payments in your store.
    Note: *Payment History will not display if the customer is new.*

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

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

Accept Payment

Customer: Bob Bevel

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

36 — Pending Payment
37 — Details (Invoice 174)
38 — Outstanding Balance (All Invoices)

Pending Payments

43 — Remove | 5 | Invoice(s): | Cash | 10/25/2016 | ✳ **42**

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

46 (Main Menu) | **47** (Print Forms) | **39** (Cash) | **40** (Check) | **41** (Credit Card) | **44** (Apply Payment(s))

45 — Payment History

Payment History

Refund	1	Invoice(s): 163	Cash	10/8/2016	$815.56	✔
Refund	2	Invoice(s): 72	Cash	8/11/2015	$25.00	✔
Refund	3	Invoice(s): 72	Cash	12/18/2015	$200.32	✔
Refund	4	Invoice(s): 72	Cash	12/18/2015	$0.68	✔

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

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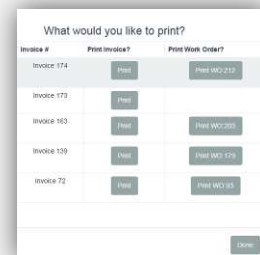
Print Invoice

49. *Invoice Preview Options*.

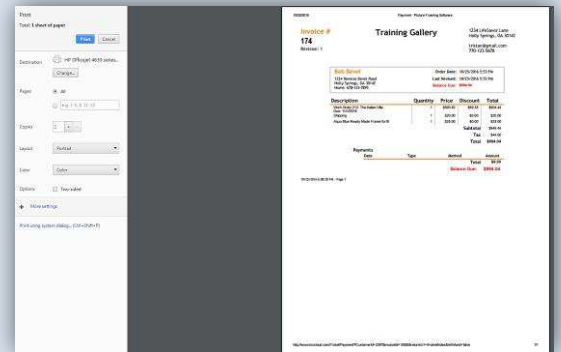- **Print:** Touch/Click the *Print* button.

Invoice Preview – Print/Export

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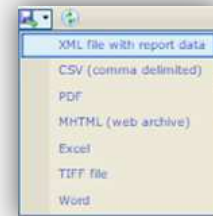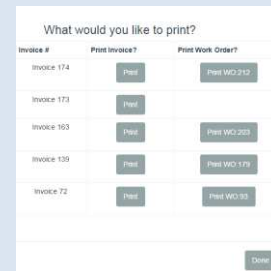

Export Invoice

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

Printer Preview *(Can vary depending on device type)*

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

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

Workorder Preview

54. *Workorder Preview Options*
   a. **Print:** Touch/Click the *Print* button.
   b. **Export:** Instructions listed under Export Invoice.

55. *Workorder Print Preview*. Touch/Click *Print* button.
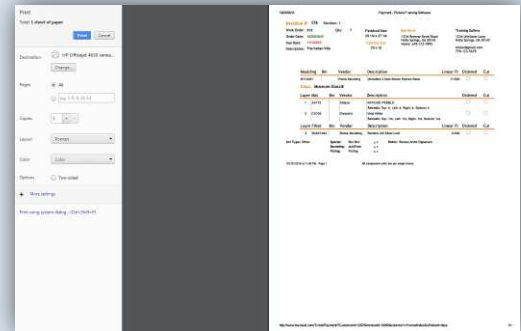
Workorder Print Preview – *(Will vary by device type.)*

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

57. Touch/Click the ***Done*** button in the Print Invoice/Workorder window.
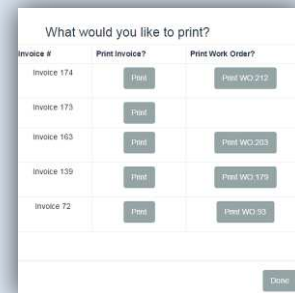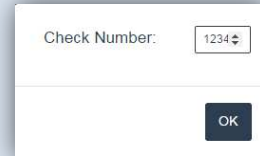

Print Invoice/Workorder

Note: If needed both the invoice and workorder can be printed again before you touch/click the done button or by touch/clicking the Print Forms button on the Accept Payment screen.

58. The ***Write Order is Complete*** and you will be returned to the Home screen!

Processing Checks & Credit Cards

Check
- Type payment amount into Pending Payment Field(s).
- Touch/Click the *Check* button
- Touch/Click the *Check Number* field in the pop up window. Enter check number. Touch/Click *OK.*
- Touch/Click Apply Payment
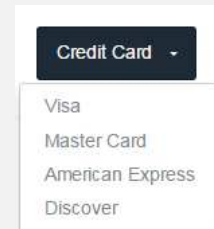
Charge with Vantiv Integration: (Visa, MC, American Express and Discover)
- Type payment amount into Pending Payment Field(s).
- Touch/Click the *Credit Card* button.
- Touch/Click the *Credit Card Type* in drop down menu.
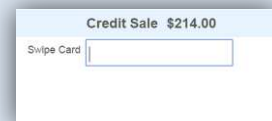
Swipe Card Entry
- Touch/Click the *Apply Payment* button. Swipe card through reader.
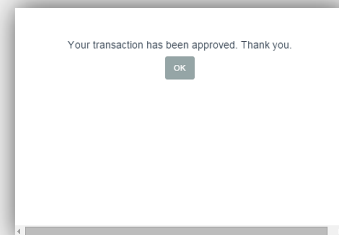
Authorization – Approved
- Your transaction has been approved. Thank you.
- Touch/Click the *OK* button.

Authorization – Declined
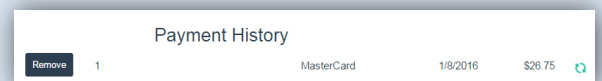- *We are unable to your order at this time. Please place your order again. Thank you.*
- Touch/Click *OK* button
- Touch/Click *Remove Payment* button.
- Ask customer for another form of payment.
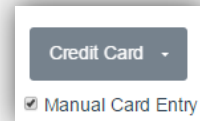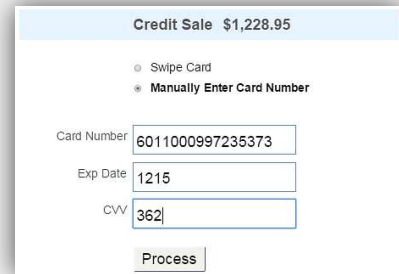
Manual Card Entry

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

Charge Card without Vantiv Integration

- Touch/Click Credit Card drop down arrow.
- Touch/Click Credit Card Type
- Touch/Click Apply Payment
- Swipe Credit Card through your merchant processing machine for approval.