

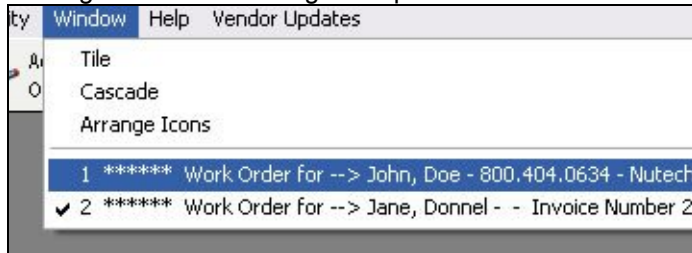
Work Orders

Enter Multiple Orders at the Same Time

1. Click the Add Work Order button along top tool bar
2. Click the add work order button again and a new work order will appear



3. You can flip between work orders simultaneously without closing any windows by simply clicking on Windows along the top menu bar and select the orders you want to work with.



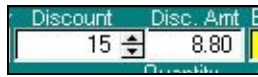
How to Enter a Work Order

1. Click the Add Work Order icon along the tool bar.
2. You are now in the Work Order Screen. Your cursor starts in the Enter Image Size section of the order. Use the tab key to navigate through the Work Order Entry Screen or use the mouse to skip from one field to another.
3. Enter the Image Size of the artwork in the Image Width and Image Height fields. Dimensions can be entered in fractions or decimals. If using fractions, put a space between the whole integer and fraction (i.e. 3 1/2)
4. If using a Ready Made Frame, click the "Ready Made Frame" button in the upper left portion of the window.
5. Two new fields will appear where you will enter in the width and height of the ready made frame. Enter the image dimensions in the "Image Width" and "Image Height" fields below the Frame width and height fields.
6. If the order is not a Ready Made frame, proceed to enter in your mat width and height in the Mat width fields for Top, Bottom, Left and Right sides.
7. The first entered top mat width size will become the default width for each remaining side (bottom, left and right). If you want to enter a mat size other than the automatically calculated size, simply type over the mat widths with your new mat width. Or select a size from the drop down list by clicking the black arrow next to each mat width field.
8. If no mat or white space is required, you can leave the White Space fields blank. If you are going to enter White Space separately in the order, do not include white space in your Image Size; rather indicate white space in the appropriate fields by clicking the White Space button.
9. Enter in your Mat Numbers in the fields to the right, from top mat to bottom mat. Enter in the first letter of the mat board vendor followed by the mat number, i.e.. A Bainbridge mat would be "B8460". For oversize mats, use "L" at the end of the number. i.e. "B8460L". This may vary depending on the format which is supplied from the vendor. However, as a rule of thumb, most vendors use B for Bainbridge, C for Crescent (if supplied by Larson) and A for Artique.
10. NOTE: If a number is not recognized, try entering it with or without the letter in front of the number. This varies from vendor to vendor. If it is still not recognized, it may be a new mat item and you need to see if there has been an update.
11. If using double mats enter in the bottom mat number in the bottom mat field. If using 3 mats, enter the 2nd mat into Mid 1 field, if using 4 mats enter the 3rd mat in the Mid 2 field. Make sure to select the exposed amount you want for each mat using the drop down arrow or by typing it in manually.

12. Next specify the type of cut you want for your mats in the Styles/Designs fields. Does your mat require additional openings? If so, enter in manually or by using the arrow buttons.
13. Tab down or click in the Frame Numbers field, line 1. Enter in the outer frame number in the first field. If an inner frame or fillet is used, use fields 2 and/or 3. The program will calculate the footage required and the price per foot.
14. Frames are coded by the frame number followed by the first 3 letters of the vendor. i.e. LeWinter frame 9975 would be 9975Lew. You can search for a frame by number or vendor at any time without closing your current window, by clicking the moulding database icon at the top of the screen.
15. If the moulding is a fillet, notice the Fillet check boxes that appear near the matboard fields. Check the Top check box if the fillet goes above the top mat, inside the lip of the frame... such as a liner. Likewise, checking the Mid 1 check box means the fillet goes between the Mid 1 mat and the Top mat, etc.
16. Next choose the Type of Glass to be used. Select from the drop down list by clicking on the black down arrow.
17. Select the Type of Mounting required if any. Again, select using the down arrow.
18. Select the Type of Fitting required using the down arrow.
19. The next 5 fields are Miscellaneous options that can be customized to include any additional work needed on the piece. Examples are laminating, stretching, extra labor charges, brass plates, etc.
20. Pressing the tab key or using your mouse will take you to Special Instructions/Condition of Art. Information written here will be printed on work orders for reference. Special Instructions could be "Do Not Call at Home" or "Call When Completed".
21. Enter an Image Description in the Image Description field to the lower left. This is a required field when saving a work order.
22. For any Additional Information, select the information required from the drop down list. An example would be "Attach Info onto Back".
23. The tab will take you next to the Due Date calendar. You can manually alter the due date, by clicking on the calendar next to the Due Date fields, click the day you want and then click the green check mark in the lower left hand corner. You can set your default due date by the number of days required, in the Setup Guide.
24. Select the name of the person taking the order by clicking the down arrow next to the Entered By field. This is a required field for saving the order.
25. NOTE: You can set a default name to appear in the Entered By field from within the Setup Guide.
26. You can change the Quantity for duplicate orders. Note: the work order totals will indicate the added amounts.
27. For the Discount, click in the field at the bottom of the entry screen and select the appropriate discount using the up and down arrows. Or enter in manually. You can enter in negative discounts to increase the price of the order. An example would be to increase an order by 20% for a Rush order.
28. If you want to mark the order as a rush order, click the Rush checkbox at the bottom left of the window. You can also mark the order as a Quote or as Tax Exempt.
29. Before saving the Work Order, click the New Name or Customer Search button in the middle left side of the screen to enter a new or existing customer.
30. To save the Work Order, click "Save Work Order" button in the lower right hand corner of the screen. If any of the required fields are not entered, you will be prompted to fill in these fields. (required fields are: Customer Name, Image Description and Entered By).
31. You can have ezFramer automatically print the work order, invoice or to prompt you to take a payment once the order is saved, Use the Setup Guide to make these settings.

Offering Work Order Discounts

1. Inside the Work Order locate the Discount field at the bottom of the order.



2. Enter in the discount amount using the scroll box by clicking the up or down arrow.
3. The order totals will adjust accordingly.

Work Orders with Multiple Openings

There are different ways one can choose to enter an order in ezFramer which involves multiple matboard openings. Although ezFramer will specify the number of openings per mat, it does diagram out the measurements for where those openings are placed on the mats. We have provided one of the ways our users will enter such an order. You can choose to use this method or use your own.

1. The key here is the designating the image height and width properly so when the mat width is specified the proper outer image size will be calculated.
2. Using a separate sheet of paper draw a diagram of the multi-opening mat. (you will attach this to the work order b/c you will use the diagram to specify the layout and the inside distances...hang on and you'll understand)
3. Measure the distance from the top of the image closest to the top of the mat to the bottom of the image which is closest to the bottom. This is your Image Height.
4. Enter this height in the Image Height Field.
5. Measure the distance from the farthest left image side to the farthest right image side. This is your image width.
6. Enter the width in the Image Width field.
7. Determine the outer mat width from each of the outside image edge to the corresponding mat edge. So if from the top of the mat to the top of the image is 2 inches, enter 2 inches. But if the bottom edge of the mat to the lowest bottom image is 3 inches, enter 3 inches for the Bottom. If you enter mat widths based on Total Mat Width then enter the desired Total Mat Width.
8. Enter these measurements in the mat width fields.
9. Enter in the Mat number in the mat fields as you normally would.
10. Indicate the number of mat openings using the up and down arrows.
11. In the Special Instructions box state a layout drawing is attached.
12. Staple the layout to the work order printout.
13. NOTE: It is a good idea to include the customer name and your name on the attached diagram incase they get separated.

Adjust Price for an Item When in a Work Order (a.k.a. Override Onscreen Pricing)

1. When inside an order click in the yellow field which holds the item's retail price.
2. A green arrow will appear indicating the override feature is turned on.



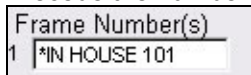
3. Highlight the existing total dollar amount and replace it with your new price.
4. Pricing is now adjusted for that item in that work order.
5. To put the pricing back to the original price simply click the green arrow again.

- Please note the pricing is only altered for the current work order, not for future orders. To change a price permanently then you will need to use the Price List.
- Trouble shooting tip: When in an order and the override does not appear to save, make sure the "Pending" check box is not checked (in the bottom left of the window). When this check box is checked, this means the order is locked of any changes.



Enter Item Numbers & Prices on the Fly in a Work Order

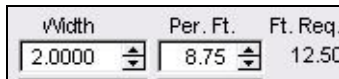
- Click in the field of your choice.
- Precede the number or item name with an asterisk (*).



- Enter the number or item name.
- Enter the retail price in the yellow price field (a green arrow will appear indicating the override feature is turned on).



- You will be prompted to add the new item if Glass, Mount, Fitting, or Misc., click Yes.
- Note: When entering mouldings, make sure to enter the width and per foot retail amount so the proper footage will be calculated.



Moulding Discounts (when taking an order)

- From inside the work order click in the Discount field located in the Frame Number section.
- Use the up and down arrows to adjust the discount percentage.
- The price for that moulding will adjust accordingly.



- Please note: Do not confuse the moulding discount with a work order discount feature at the bottom of the window. The work order discount feature will discount the entire order, even if you have entered a moulding discount.

Default Moulding Discounts

- To set a default discount for your mouldings, go to File – Preferences – Setup Guide.
- Click on the Vendor tab.
- In the window which appears click the Default Moulding Settings tab.

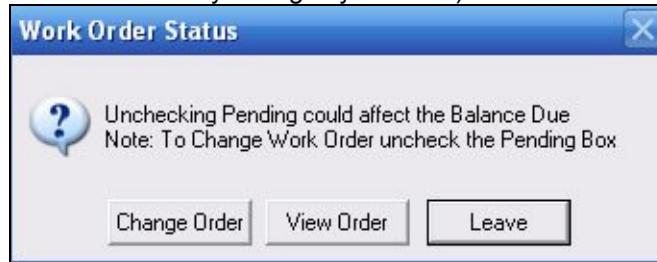


- Enter the discount percentage in the Default Moulding Discount field.

5. Close the window by either clicking Next till it closes or just click the “X” in the top right corner
6. You can now click Save & Close to exit the setup guide.

Edit Work Order after Saving

1. Click the Customer History window button along the tool bar.
2. Locate the Work Order for your customer .
3. Double click on the row which lists the specific work order you want to edit.
4. Click the Change Order button (clicking View Order will allow you to look at the order but will NOT save any changes you make).



5. Enter any changes to your order.
6. When finished click Save Changes

Copy a Work Order

1. When in the Customer History Window simply select the work order you want to copy by clicking in the “M” column so a red arrow appears. M stands for Marking.
2. Then click the Copy Work Order button on the bottom right. It will tell you the “record” or order has been copied and you will see that a new Invoice and work order have been created.

There are a few things to keep in mind when copying an order:

3. You must go into the order to update the order after copying. .
4. If you had a payment on the original order it will not carry over and when you update the order the payment received will be set to zero.
5. Discounts will not be carried over. To apply a discount open the order and then save it.
6. If you want to change the customer name on the copied order to a different customer, use the instructions for Changing the Customer for an Order.
7. Qty’s will be kept when copied. To change it, open the order, make the change and then save it.
8. If prices in your Price List have been updated since the original order was taken, the prices will be updated when you open and save the order. If you must keep the original pricing, then open and use the over-ride feature. Remember you can open more than one order at a time thus allowing for easy switching back and forth. You’ll see the list of opened orders by clicking Window along the menu bar.