

Mark

Framing Pricing Tool

User Manual

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1. To give a quote

1.1.Overview

This is the main screen of MarkO Software. When you're giving a quote to a client either in person or on the phone, you don't need to enter their personal information right away.

The software is ready to calculate a price. Categories:

Mount type: Under this drop down menu choose the type of art you're quoting for, canvas, photo, paper art, etc.

Image measurement: Enter the art measurements on this box. Measurements are in inches and they increase and decrease in 1/8s

Glazing or Mirror: If required, enter the type of glass needed for the job.

Fitting: This is the labour being charged for the job. Increases/decreases in 1/4hr

Frame style: Enter the code of the frame being used for the project.

Top mat: If a mat(s) is required, Scan the bar code of the chosen mat(s), starting from the bottom mat to the top.

Mat exposure: For each mat selected, enter the amount of exposure required.

Press the QUOTE button to calculate a price.

2. Mount Types

2.1.Canvas

Select this option any time you receive a piece of art that is on fabric (usually thick) and requires to be stretched over wooden stretcher bars. Oil and Acrylic paintings are the most common ones.

There are paintings brought from the Caribbean/Africa/South America that are done in thinner fabrics, bed linens for example, they still get stretched over wooden stretcher bars.

Digital prints on canvas, wool needlepoint and some tapestries also get stretched this way.

Measuring a Canvas

Measure only the image, NOT edge to edge. We stretch canvasses by hand, therefore you need enough fabric for the pliers to pull properly. Depending on the stretcher bar chosen is the amount of extra material all around required to stretch.



Extra Material required all around for Gallery Wraps (staples on the back)

Stretcher bar:

- #6011: 3 inches
- #6013: 3 ½ inches
- #MVFC1.75: 3 inches
- #MVUS Mini: 2 ½ inches
- #ST03: 3 ½ inches
- #ST04: 3 ½ inches

If doing a Standard Stretch, (staples on the side), subtract an inch from the required extra fabric.

We DON'T stretch over stretcher bars brought by a customer. We don't know anything about such stretcher bars thus cannot guarantee a good result.

Pricing/Quoting a Canvas Stretch

Under "Order Description" type a short description of the art.

1. Choose "Canvas" from the Mount Type drop menu
2. Enter Image measurement width by height
3. Fitting:
 - a. Under 20 x 24: ¾ hr
 - b. 20 x 24 to 30 x 40: 1hr
 - c. 36 x 48 and up: 1 ½ to 2hrs
 - d. Largest possible size at our shop 4½ ft x 6 ½ ft: 3 ½ hrs
4. Click the button "0" for the stretcher bar menu to appear
5. Select the stretcher bar code required
6. Press the "Quote" button to calculate price
7. More Options – If customer wants Tape to cover side staples choose it from this menu, then click the button "Add".

If customer wants to place the order, enter their information and press the "Enter Customer" button. Then click the button "Process Order" and proceed to collect.

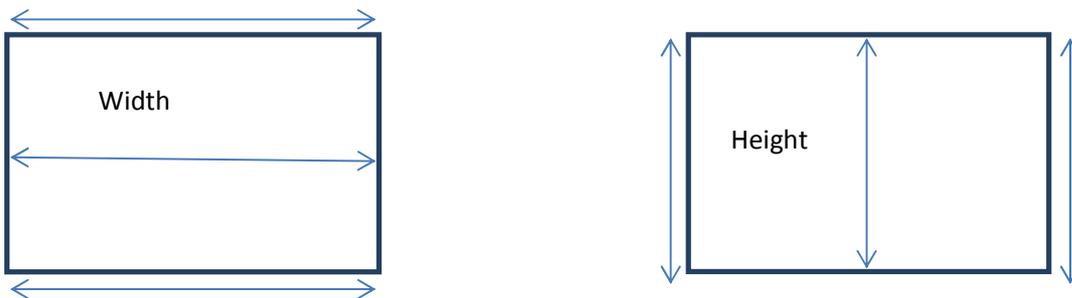
2.2.Canvas Ready

Select this option when you receive a painting that's been already stretched. These are the pieces done by artists in pre-stretched canvasses. Paintings on canvas boards and thick substrates like gatorboard, acrylic or similar stiff materials enter in this category. In summary, these pieces don't need to be stretched or require any special mounting.

Most of these pieces should be treated as a regular canvas, therefore, they don't require glass or matting, they just need to be assembled onto a frame.

Measuring a Canvas Ready

Most of the time these pieces are not perfectly squared, so you need to take several measurements. Always choose the larger numbers.



Pricing/Quoting a Canvas Ready

Under "Order Description" type a short description of the art.

1

2

3

4

5

6

Order Description:

Mount Type: **Canvas Ready**

Image Measurement: Width: 16 Height: 20 inches

Glazing or Mirror: Claryl Glass

Fitting: 1 hour(s)

Mat Openings: 1

Comments:

Ready Made Frame Width: 0 Height: 0 inches

Frame 1 Style: **Select**

Top Mat:

Mat Exposure:

More Options:

Qty: 1 x

Currently Quote #: 2185

Quote X 1

Save Quote Print Quote

Total: \$0.00

Amount Paid: 0.00

Change: \$0.00

GST: \$0.00

Process Order

Clear

1. Choose "Canvas Ready" from the Mount Type drop menu
2. Enter canvas measurement width by height, if canvas is being framed using a floater frame, make sure to add the total space allowance to the image measurements. Example: Canvas measures 16 x 20, you want ¼ allowance space between floater and canvas, enter the image measurement as 16 ½ x 20 ½
3. Fitting:
 - a. Under 16 x 20: ¾ hr
 - b. 16 x 20 and up: 1 to 1 ½ hrs
4. Make sure the button "1" is selected for the frame style bar menu to appear
5. Select or Scan the frame code required
6. Press the "Quote" button to calculate price

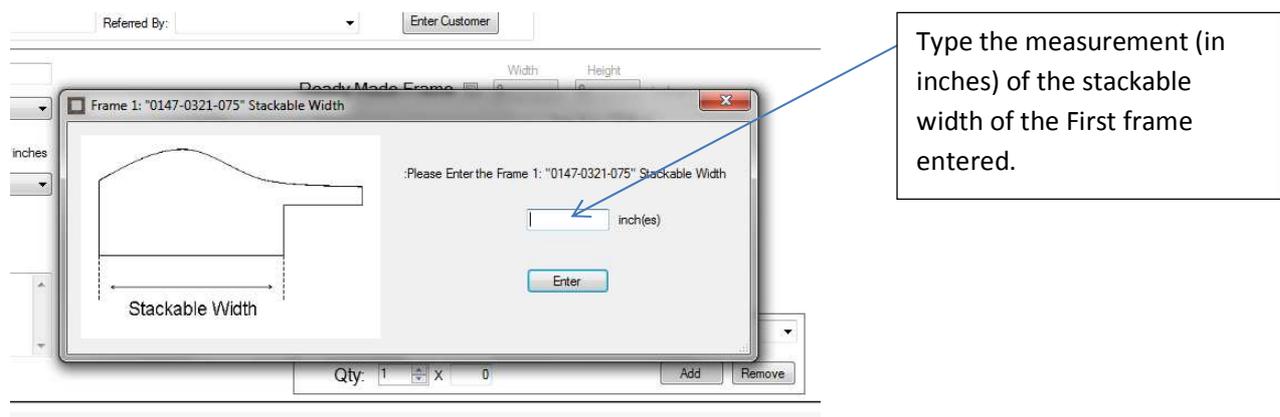
If customer wants to place the order, enter their information and press the "Enter Customer" button. Then click the button "Process Order" and proceed to collect.

2.3. Stacking frames

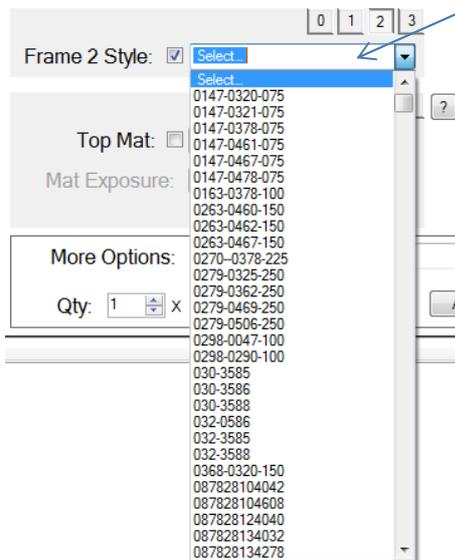
It's very common for these pieces to choose two (or more) frames to enhance the look of the art. You're basically using an inner frame as a liner and stacking another on top of it. To price a stacked frame order, follow steps 1 to 5 and then:



Once you check mark this little box, a pop window will appear:



The pop window will disappear and now you can enter or scan the frame code of the second frame.



Follow the same procedure if there are more frames to be stacked. If there aren't any more frames to be stacked, you can now press the "Quote" button to calculate price.

If customer wants to place the order, enter their information and press the "Enter Customer" button. Then click the button "Process Order" and proceed to collect.

2.4.Canvas stretch and frame

When a customer brings a rolled canvas that needs stretching and the client also wants to frame it, follow steps 1 thru 5 from the Canvas stretch quoting procedure then press the button "1" for the frame style bar to appear. Then enter or scan the frame code selected.

2.5.Fabric art

Select this option when you receive a piece of art that is done on fabric other than canvas. These pieces usually require being hand- sewn onto a mat board; pinned to a piece of foam board or adhered with a specialty tape to a mounting board. Examples are silk pieces (like batiks), flags, napkins, handkerchiefs; smaller pieces that DON'T require a shadow box mount. If the piece requires a stretcher bar, then enter it as a Canvas.

The screenshot shows a software interface for fabric art mounting. Numbered callouts point to the following fields:

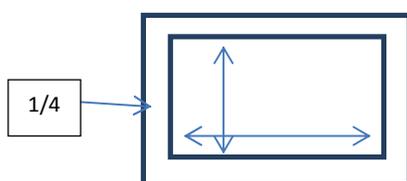
- 1: Mount Type dropdown menu (set to Fabric Art)
- 2: Image Measurement Width and Height input fields (16 and 20 inches)
- 3: Glazing or Mirror dropdown menu (set to Claryl Glass)
- 4: Fitting input field (set to 1 hour(s))
- 5: Ready Made Frame Width and Height input fields (0 and 0 inches)
- 6: Frame 1 Style dropdown menu
- 7: Mat Exposure input fields (Width and Height)
- 8: Quote button

Other visible fields include: Order Description, Mat Openings (1), Comments, Top Mat dropdown menu, More Options dropdown menu (OTHER), Qty (1 x 0), Total (\$0.00), Amount Paid (0.00), Change (\$0.00), and GST (\$0.00). Buttons for Save Quote, Print Quote, Process Order, and Clear are also present.

1. Choose "Fabric Art" from the Mount Type drop menu
2. Enter art measurement width by height
3. Select the type of glass chosen
4. Fitting: Always charge a minimum of 1hr, increase as required
5. Enter or Scan the frame code required
6. Scan the mat board code selected (repeat if there is more than one mat)
7. Type the mat exposure desired
8. Press the "Quote" button to calculate price

Measuring Fabric Art

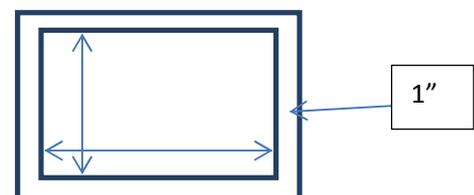
If piece is being matted



No mat, piece will be adhered



No mat, piece will be pinned



1. If piece is being matted (on top of art), regardless of the type of mount required only measure the image, and leave about 1/4 inch left all around for the mat to sit on.
2. If piece is being un-matted (on top of art), and it will be all adhered/sewn to either a mat or mounting board, then measure edge to edge.

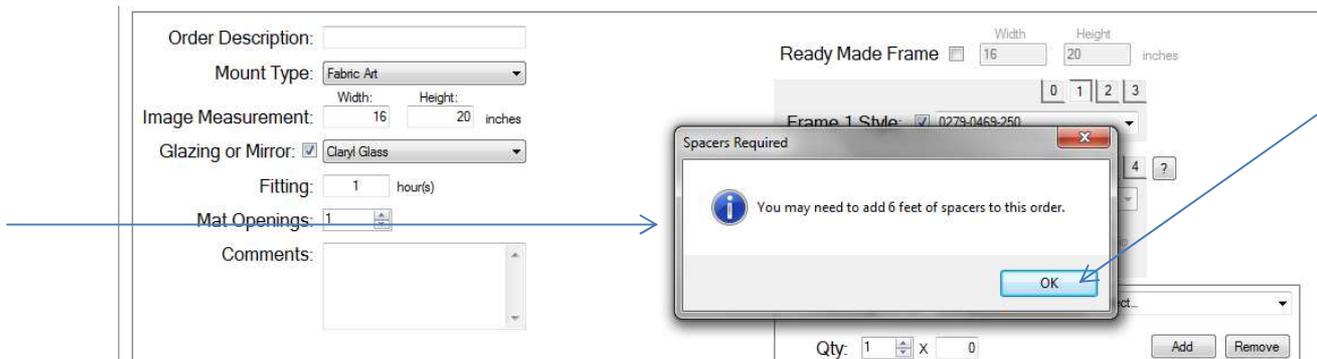
- If piece is being un-matted (on top of art), and it will be stretched over a piece of foam board with pins, measure the image and leave about 1 inch all around so that fabric can be pulled and pinned.

A Note about preservation of fabric art

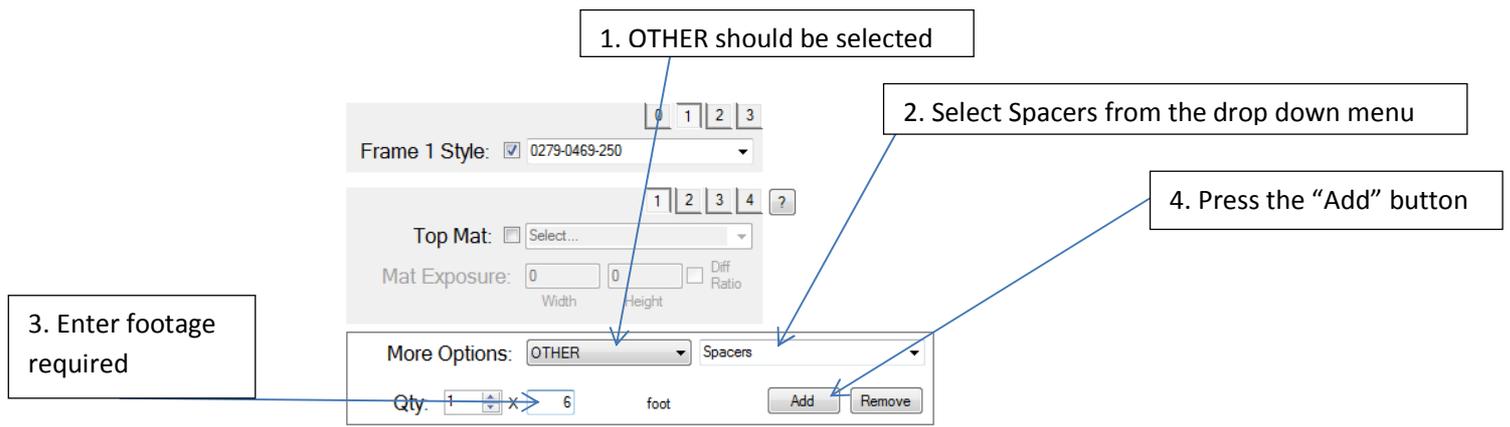
The ideal framing for fabric art, would be with no adhesives, using either pins or sewing thread to hold it on the mounting board. Also the textile must never touch the glazing; if condensation occurs, the fabric may absorb the water and develop a stain. The best way to prevent this is using at least two mats or a spacer. Visible and non visible light deteriorates fabric, it may cause fading, darkening, yellowing, changes in color as well as embrittlement; try to choose glass that contains UV filtering.

2.5.1. How to select spacers when piece is not being matted.

When you've selected "Fabric Art" as your mounting type but don't select any mat board you'll be prompted by the following pop up window:



You can click "OK" and disregard the message or click "OK" and add spacers to the order. In this case the system is recommending 6 feet of spacers and this is what we will choose:



If you've selected a mat board to mount the fabric, but there is no window mat on top of it, you will not be prompted, but you should still add spacers to the order.

2.6.Float mount

Select this option when you're working with a piece of art that will be "floated" on top of a mat. This option is used with pieces that have interesting edges; like papyrus, stamped leather, artistic paper with "raw" edges or art whose image goes all the way to the edge and cannot be covered with a mat.

Under "Order Description" type a short description of the art.

Order Description:

Mount Type: **Float Mount**

Image Measurement: Width: 16 Height: 24 inches

Glazing or Mirror: Clay Glass

Fitting: 1 (hour(s))

Mat Openings: 1

Comments:

Ready Made Frame: 0 x 0 inches

Frame 1 Style: Select...

Top Mat: Select...

Mat Exposure: 0 x 0 inches

More Options: OTHER Select...

Qty: 1 x 0

Quote X 1

Save Quote Print Quote

Total: **\$0.00**

Amount Paid: 0.00

Change: **\$0.00**

GST: **\$0.00**

Process Order

Clear

ItemQty	ProductCode	Description	Total	Code
---------	-------------	-------------	-------	------

1. Choose "Float Mount" from the Mount Type drop menu
2. Enter art measurement width by height
3. Select the type of glass chosen
4. Fitting: Always charge a minimum of 1hr, increase as required
5. Enter or Scan the frame code required
6. Scan the mat board code selected (repeat if there is more than one mat)
7. Type the mat exposure desired
8. Press the "Quote" button to calculate price

Remember to suggest the use of spacers if no window mat (top of art) is selected.

Art to be floated gets measured edge to edge, always choose the largest edges if the piece is irregular.

If customer wants to place the order, enter their information and press the "Enter Customer" button. Then click the button "Process Order" and proceed to collect.

2.7. Multi Opening

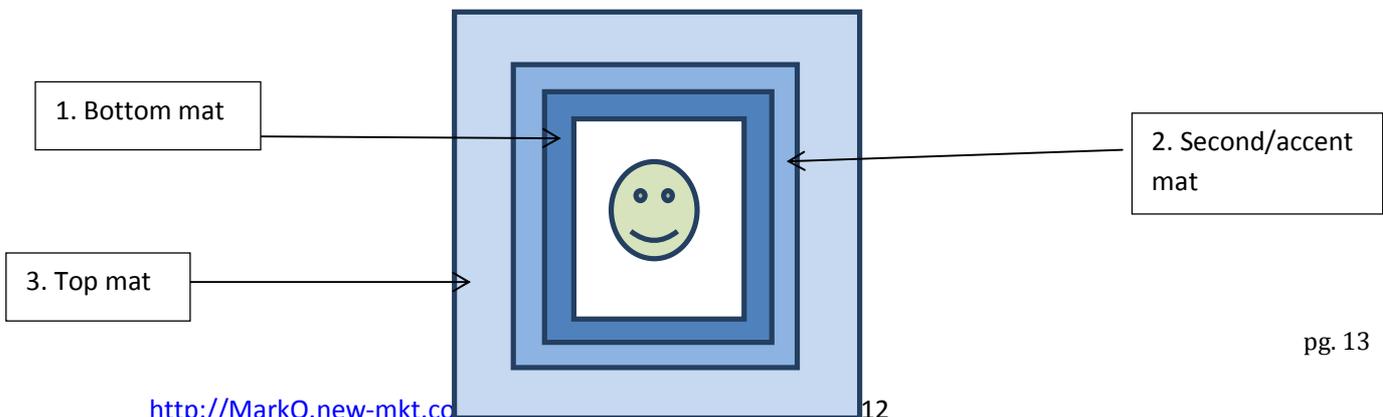
When receiving an order that requires more than 3 openings on a mat, use this option. This option should be used when we're doing the full custom framing order (mounting, matting, glass and frame). If a customer only needs a mat cut but we are not doing anything else, don't use this option.

Under "Order Description" type a short description of the art.

1. Choose "Multi Opening" from the Mount Type drop menu
2. Enter art measurement width by height
3. Select the type of glass chosen
4. Fitting: Always charge a minimum of 1hr, increase as required
5. Type the number of mat openings
6. Enter or Scan the frame code selected
7. Scan the mat code chosen (repeat if more than one mat)
8. Type the mat exposure desired
9. Press the "Quote" button to calculate price

If customer wants to place the order, enter their information and press the "Enter Customer" button. Then click the button "Process Order" and proceed to collect.

When entering mats, always start from the bottom mat, all the way to the top mat.



How to measure a multi opening

Mat exposure

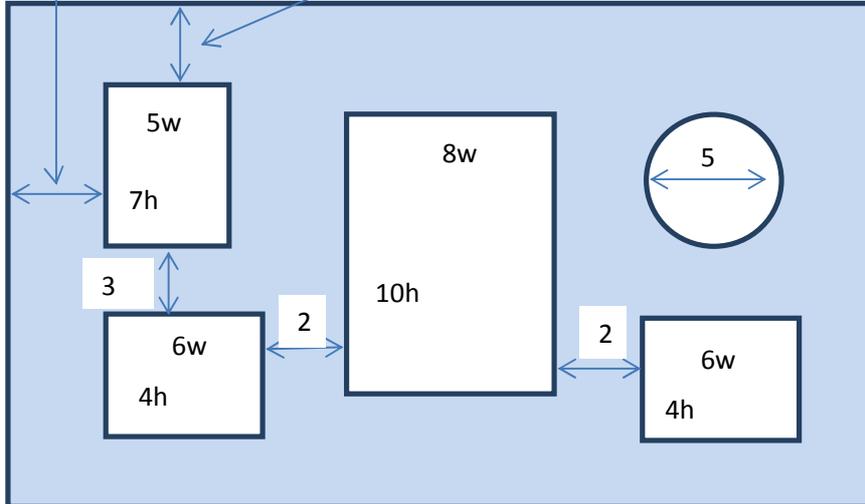


Image measurement:

Width:

$$6+2+8+2+6=24$$

Height:

$$7+3+4=14$$

If there is more than one mat used for the order, remember to enter the bottom mat first, then work all your way up to the top.

2.8. Needlework

This option includes traditional cross stitch and embroidery pieces. These pieces need to be stretched onto acid free foam board, using stainless steel pins.

When measuring these, always allow $\frac{3}{4}$ - 1" of extra fabric to stretch.

As with other fabric art, use of matting is recommended to prevent the threads from touching the glass, if no matting is selected, use of spacers is suggested.

Follow the same steps as "Fabric art" to prepare/process a quote. Just choose "Needlework" under the mount type drop down menu.

2.9. Needle/Fabric Ready

Sometimes customers might bring their pieces already stretched or mounted; they're either on older frames and need refreshing, or the client knows how to mount these and did it her/himself.

To measure these pieces, you measure edge to edge, similar to a ready stretched canvas.

To price these, follow the same steps as Fabric art or Needlework, make sure you select "Needle/Fabric ready" under the mount type drop down menu.

2.10. Paper Art

This is the most common framing piece. As the name states, this option includes all artwork done on paper: Certificates, prints, news articles, etc. Mounting process for these pieces is usually a tape mount (tape hinged) or mounting pockets/strips. Basic Acid free mounting board is used.

Use of matting is always recommended, so art is secured by the weight of the mat.

If the client doesn't want any matting, and the piece is replaceable and has no real value, you may want to suggest dry mounting instead (permanently adhered to foam board). Adhesive Photo mounts may be used as well. These mounting processes should not be used for limited edition prints, original art or signed and numbered pieces.

To price/quote paper art pieces, follow the same steps as needle work or fabric art, just select "Paper Art" under the mount type menu.

If the art is being matted, remember to measure the image only (what the customer wants to see), therefore leaving an allowance (at least 1/8) for the mat to sit on.

2.11. Photo

Use this option when you receive a photo smaller than 16 x 20 that will be drymounted. If photo is larger, select "Poster Dry Mount". If photo will be tape hinged, just select "Paper Art". Follow the same measuring rules of paper art mounting.

2.12. Poster Dry Mount / Dry Mount & Guard

Any time you receive a poster, photograph, or replaceable paper art that measures more than 16 x 20 and will be dry mounted, select this option. If a piece of art is to be conservation framed then dry mounting cannot be used, since it would adversely affect the value of the art. Dry mounting is not reversible.

Dry Mounting is the use of a dry tissue adhesive that is activated by heat from a heat press to bond artwork to a mounting board. Dry mounting is primarily used to mount photographs, posters, and any art-work that is water-sensitive. This system of mounting flattens the artwork to give a clean look.

If the document will be laminated, instead of using Poster Dry Mount, select "Dry Mount & Guard". Make sure to note on comments what type of laminate will be used: matte, canvas text or gloss.

Follow the same measuring rules of paper art mounting.

2.13. PS Dry Mount

This is very similar to the Dry Mount process. However no heat is involved. The mounting is done using pressure sensitive adhesive that will bond to the document using a roller press. Choose this option when you have replaceable paper art that is too thick, or photographs that may not stand heat, or over size documents (over 36 x 48) that won't fit in a vacuum press.

2.14. Preservation

Most paper art pieces will fall under the "Paper Art" category, but once in a while you will get an antique irreplaceable document, an ancient map, a very old photograph or an original one of a kind piece of art. This means that to mount this piece you will need 100% preservation/museum quality materials; such as rag board / rag mats (100% cotton), museum barrier board, framing sealing tape, etc. Select this option when a highly valuable piece will be framed. Make sure to select the appropriate matting and glazing for such projects.

2.15. Ready Mount

This option will include documents, photos, postcards, etc, that have been already mounted and matted. Most times customer only needs the frame and glass. Fitting: 1/2hr – 1hr

2.16. Shadow Box 3D

All 3D objects to be framed fall into this category: Plates, knives, balls, guns, collectibles, medals, etc. Also any sport jersey or piece of clothing that will be hand sewn onto a matboard.

In order to measure such items, arrange them on the counter in the way the customer wants to see them, and then measure the widest points.

Fitting charges:

Objects: 2 – 3 hrs

Clothing/Jerseys: 4 – 5 hrs

When selecting glazing and matting; remember a standard sheet measures 32 x 40, if your object is larger, select Oversize glass and matting (40 x 60).

Enter selected frames and matting as usual. Make sure to write down all important notes about the objects arrangement, you can even make drawings with specific indicators.

2.17. Jersey 1 / Jersey 2 / Jersey Pro

These are supplier made boxes. They all measure a standard of 32 x 40.

Fitting charge: 1hr

2.17.1. Jersey 1 / 2 These are manufactured by Cimarron Sales.

The Jersey is hung onto an acrylic hanger mounted inside of the box. These boxes are ideal for Hockey and Football Jerseys. One measures 1" deep plus the cap, the other measures 2" plus the cap. Price includes 3 mats (they carry their own brand of matboards, you just indicate to them the colors you want and the order in which they are to be cut and arranged).

2.17.2. Jersey Pro This box is supplied by Larson Juhl

The box measures 2" deep and it includes black backing board. This box doesn't include any matting, if wanted, charge the appropriate amount for each mat selected. The Jersey is hung onto a metal hanger mounted inside of the box. This box is ideal for smaller sports jerseys like Soccer or Baseball.

2.18. Plaque Mount / Flush Plaque / Mat Plaque / Dibond

These projects are outsourced; they are not done in house. There is no fitting charge for these options, unless is an oversize image (over 32 x40) then a ¼ - ½ hr fitting charge is applied.

You can use these mounting methods for the following items: Anything flat that is no more than 1/8 thick: Like Awards, Advertising Materials, Photos, Posters, Newspaper & Magazine Articles, Blueprints, Postcards, Children's Drawings, Mission Statements, Charts, Jigsaw Puzzles, Maps, etc. If a print is valuable or irreplaceable it should not be laminated or plaque mounted.

- 2.18.1. **Plaque Mount / Flush Plaque :** Plaque mounting is a process where the artwork (poster, print, photo and so on) is laminated onto medium density fiberboard or MDF. The edges are then beveled and painted with colour. A Plaque mount is laminated onto a ½" thick board and a Flush plaque gets mounted onto a 1" thick board. Documents being plaque mounted get measured edge to edge.
- 2.18.2. **Mat plaque:** It's the same mounting process as a plaque or flush plaque. The difference is that there's some color background left around acting as mat border. When entering measurements, measure the document to be plaqued and add to amount of border exposed to get the total image measurement.
- 2.18.3. **Dibond:** The printed image is mounted with a special adhesive to a double layer of thin aluminum with a PVC core in between. This material guarantees extraordinary stiffness and a very even surface. As an additional protective layer, the image receives a laminated finish to protect it from the elements and from UV damage. Both matte and glossy images can be mounted on aluminum dibond. Measure the same way as a Mat Plaque.

3. Glass Types

The screenshot shows a software interface for creating a quote. At the top, there are tabs for 'Counter Sales', 'Invoices', 'Quotes', 'Order Status', 'Totals', 'Quantities', and 'Sales Report'. Below the tabs, there's a 'Customer' section with fields for 'Phone' (111-111-1111), 'Name' (Quote), 'e-mail', 'Address', and 'Referred By' (Google). There are buttons for 'Change Customer Info', 'Enter Customer', and 'Print'. The 'Order Description' section has a 'Mount Type' dropdown and 'Image Measurement' fields for 'Width' and 'Height'. The 'Glazing or Mirror' section has a checked checkbox and a dropdown menu that is open, showing a list of options: Claryl Glass, Clear Acrylite, Clear Glass, Conservation Acrylite, Conservation Clear, Conservation Reflection, CRC Oversize, Museum Glass, OS Conservation Clear, OS Premium Clear, OS Reflection Control, Oversize Claryl Glass, and Reflection Control. The 'Ready Made Frame' section has 'Width' and 'Height' fields (both 0) and a 'Frame 1 Style' dropdown. The 'Top Mat' section has a checked checkbox and a dropdown. The 'Mat Exposure' section has 'Width' and 'Height' fields (both 0) and a 'Diff Ratio' checkbox. The 'More Options' section has a dropdown set to 'OTHER' and a 'Select...' button. The 'Qty' section has '1' and '0' fields and 'Add' and 'Remove' buttons. On the right side, there are buttons for 'Quote', 'Save Quote', 'Print Quote', and 'Process Order'. The 'Total' is \$0.00, 'Amount Paid' is 0.00, 'Change' is \$0.00, and 'GST' is \$0.00. At the bottom, there's a table with columns for 'ItemQty', 'ProductCode', 'Description', 'Total', and 'Code'.

There are several glazing options available depending on the framing requirements.

3.1. Non-conservation choices:

- 3.1.1. **Clear Glass:** It's a quality clear picture framing glass for budget projects that do not require U.V. protection or reflection control. Blocks up to 45% of UV light which makes it a non-conservation grade glass. A standard sheet measures 32 x 40, any job bigger than this should use OS Premium Clear.
- 3.1.2. **Reflection Control:** This glass has an Etched matte-like finish that minimizes glare. Blocks up to 45% of UV light which makes it a non-conservation grade glass. Use on any framing project with up to two mats away from artwork without significant resolution loss, otherwise image will start to look "fuzzy". A standard sheet measures 32 x 40, any job bigger than this should use OS Reflection Control.
- 3.1.3. **Claryl Glass:** This glass contains a special Claryl® coating similar to the coating on Museum Glass but without the UV protection. It is a lower priced alternative for those who want reflection control but where UV protection is not imperative. Claryl is not an etched product. Rather, the clear Claryl® coating allows all of the light through so the picture looks razor-sharp. Moreover, there is virtually no color distortion in this water-white, low iron glass. A standard sheet measures 32 x 40, any job bigger than this should use Oversize Claryl Glass.
- 3.1.4. **Clear Acrylite:** Use for projects larger than 40 x 60 or artwork pieces that will be shipped.

3.2. Conservation choices:

- 3.2.1. **Conservation Clear:** Ideal for any framing application, if reflection-free viewing is not important. It protects artwork against damage and fading caused by UV light, It filters 98% of damaging ultraviolet light. A standard sheet measures 32 x 40, any job bigger than this should use OS Conservation Clear.

- 3.2.2. **Conservation Reflection or CRC:** Has the same U.V. filtering quality as conservation clear glass, but has an etched surface to reduce glare. This surface softens the image with a resulting slight loss in clarity and color intensity. Use on any framing project with up to two mats away from artwork without significant resolution loss. A standard sheet measures 32 x 40, any job bigger than this should use CRC Oversize.
- 3.2.3. **Museum Glass:** For protecting valued or irreplaceable artwork against damage and fading caused by UV light. For virtually invisible glazing that will enhance colors, brightness and contrast levels of all types of artwork. Ideal for deep framing projects, including shadow boxes and multiple mat pieces. Currently we don't carry oversize Museum glass.
- 3.2.4. **Conservation Acrylite:** It filters 98% of damaging ultraviolet light and provides an extremely clear view of the image without the slight greenish tint that is inherent in regular glass. Like other acrylic products, it is ideal for shipping and installing oversize pieces of art.

Some notes about UV: Indoor and outdoor UV light rays contribute to irreversible damage. Colors may fade and shift and the materials that make up the piece may become brittle or yellow. All light sources emit harmful UV light rays. Sunlight and indoor lighting, such as fluorescent and tungsten, contain different amounts of UV energy that can cause irreversible damage to artwork.

UV protection reduces fading and other damage caused by UV light over time. Leading authorities on preservation recommend using glazing that blocks at least 97% UV light.

4. Quotes

Estimated Time for Order Completion: 11 days (July-31-12)

Frame Builder: Counter Sales | Invoices | **Quotes** | Order Status | Totals | Quantities | Sales Report

Customer: Phone: 111-111-1111 Name: Quote e-mail: Change Customer Info
Address: Referred By: Location

Order Description: Flower
Mount Type: Canvas
Image Measurement: Width: 16 Height: 20 inches
Glazing or Mirror: Claryl Glass
Fitting: 1 hour(s)
Mat Openings: 1

Ready Made Frame Width: 16 Height: 20 inches
Frame 1 Style: 366-1-A
Top Mat: Select...
Mat Exposure: 0 Width 0 Height Diff Ratio

More Options: OTHER Select...
Qty: 1

Currently Quote #: 2262
 X 1

Total: \$128.63
Amount Paid: 0.00
Amount Due: -\$128.63
GST: \$6.13

ItemQty	ProductCode	Description	Total	Code
1	Canvas	Flower - Canvas Mounting Materials Canvas Stretching ImgSize: 16 W x 20 H.	\$18.50	RXPNOO
1	366-1-A	Frame 1: 7 F, 16 1/8 Width, 20 1/8 Height. HF Charcoal	\$45.50	UEPNOO
1	MVFC1.75	Stretcher Bar: 6 F, 16 Width, 20 Height. Standard Stretcher bar	\$22.50	RAPUXO
1	Fitting	1 hour(s).	\$36.00	BTPOOO
0	Comments:	Total ImgSize: 16 W x 20 H in. Quote: 2262.	\$0.00	OPOOO

When giving out a quote you're not obligated to take the customer's information. When you press the button "Quote", the software is doing the pricing for you. Before you give out the price to your client, make sure the information you've entered is correct. You don't need to save your quote every time you're pricing something, in particular when you're giving out quotes over the phone.

If your client is present, then you may want to save the quotes you're working with, especially if the client has several framing options in mind or has brought various projects to be framed. Just press the "Save Quote" button. You can re-call any saved quote later, going to the "Quotes" tab page.

Try to avoid giving clients a printed quote, you don't know when they will come back, or if they'll use the printed quote to compare at other shops. If you think is necessary to keep the information, then is better to just save the quote, rather than printing it. When dealing with a Corporate client, then the process is a bit different, since most of the times they actually need a printed quote to get approval from their acct. dept.

If you want to reset the "frame builder" page, just click the button "clear".

5. Processing Orders

Estimated Time for Order Completion: 11 days (July-31-12) Claudia

Frame Builder | Counter Sales | Invoices | Quotes | Order Status | Totals | Quantities | Sales Report

Customer
 Phone: 111-111-1111 | Name: Quote | e-mail: | Change Customer Info
 Address: | Referred By: Location Currently Quote #: 2262

Order Description: Flower
 Mount Type: Canvas
 Image Measurement: Width: 16 | Height: 20 inches
 Glazing or Mirror: Clear Glass
 Fitting: 1 hour(s)
 Mat Openings: 1
 Comments:

Ready Made Frame Width: 16 | Height: 20 inches
 Frame 1 Style: 366-1-A
 Top Mat: Select...
 Mat Exposure: Width: 0 | Height: 0 Diff Ratio
 More Options: OTHER | Select...
 Qty: 1 x 0

x 1
Total: \$128.63
 Amount Paid: 0.00
 Amount Due: -\$128.63
 GST: \$6.13

ItemQty	ProductCode	Description	Total	Code
1	Canvas	Flower - Canvas Mounting Materials - Canvas Stretching - ImgSize: 16 W x 20 H.	\$18.50	RXPNOO
1	366-1-A	Frame 1: 7 F, 16 1/8 Width, 20 1/8 Height. HF Charcoal	\$45.50	UEPNOO
1	MVFC1.75	Stretcher Bar: 6 F, 16 Width, 20 Height. Standard Stretcher bar	\$22.50	RAPUXO
1	Fitting	1 hour(s).	\$36.00	BTPOOO
0	Comments:	Total ImgSize: 16 W x 20 H in. Quote: 2262.	\$0.00	OPOOOO

Once the customer has agreed with his framing option and the quoted price, and decides to proceed with the order, then you're ready to process the order and create an invoice.

First, make sure you've written the art description and any special notes (comments) about the project.

Ask the client for his phone number, full name, address (postal code and e-mail address are optional) and try to always ask how they found out about us and choose from the drop down menu. Once all the information has been entered, press the "Enter Customer" button.

You cannot process an order without customer's information.

Again, double check all the framing information is correct.

Press the "Process Order" button.

Estimated Time for Order Completion: 11 days (July-31-12)

Frame Builder Counter Sales **Invoices** Quotes Order Status Totals Quantities Sales Report

Invoice Number: 1322 Invoice Status: 1 - To Do Invoice Remarks:

E-Mail Customer: Order is ready for pick up Send E-Mail

Customer: Phone: 403-541-1948 Name: Claudia e-mail: Address: my adress Referred By: Location

Quote Number: 2262 Add quote to invoice

Save Changes Print Invoice

CustomerID	TotalPaid	Due	InvoiceTotal	GST	InvoiceDate	ProcessedBy	DateCompleted	InDays
755	\$0.00	-\$128.63	\$128.63	\$6.13	Jul 20, 2012 14:38	Claudia		0

ItemQty	ProductCode	Description	Total
1	Canvas	Flower - Canvas Mounting Materials Canvas Stretching ImgSize: 16 W x 20 H.	\$18.50
1	366-1-A	Frame 1: 7 F. 16 1/8 Width, 20 1/8 Height. HF Charcoal	\$45.50
1	MVFC1.75	Stretcher Bar: 6 F. 16 Width, 20 Height. Standard Stretcher bar	\$22.50
1	Fitting	1 hour(s).	\$36.00
0	Comments:	Total ImgSize: 16 W x 20 H in. Quote: 2262.	\$0.00

Once you've processed an order, the software will take you to the "invoices" screen. An invoice for the processed order has been created.

If the client has several orders and they were saved as quotes, you can go to the "Quotes" tab, and check for the quote number. Then go back to the "Invoices" tab and under "Quote Number" type the quote number you need to add to the invoice. Repeat if there is more than one extra quote to be added.

Proceed to ask the client for a deposit (usually about 50% from the total) or payment in full if they wish to.

Type the amount they're paying in the "TotalPaid" cell. Save the information pressing the "Save Changes" button.

Turn on the printer underneath the counter and wait until is ready to print.

Continue to print the invoice by pressing the "Print Invoice" button. Always print two copies, one for the client and one for the store.

While printing you can proceed to collect payment from the client. ;-)

6. How to process discounts

6.1. Discount from the total amount

Two ways:

6.1.1. Frame builder tab

Estimated Time for Order Completion: 11 days (August-04-12)

Customer last visit was July-20-12 (3 days ago)

Phone: 403-541-1948 Name: Claudia e-mail: Change Customer Info

Address: my address Referred By: Location Currently Quote #: 2263

Order Description: Flower

Mount Type: Canvas

Image Measurement: Width: 16 Height: 20 inches

Glazing or Mirror: Claryl Glass

Fitting: 1 hour(s)

Mat Openings: 1

Comments:

Ready Made Frame Width: 16 Height: 20 inches

Frame 1 Style: 154-1-5/8-A

Top Mat: Select...

Mat Exposure: Width: 0 Height: 0 Diff Ratio:

More Options: OTHER Select...

Qty: 1 x 0

Quote X 1

Total: **\$159.60**

Amount Paid:

Amount Due: **-\$159.60**

GST: **\$7.60**

Item/Qty	ProductCode	Description	Total	Code
1	Canvas	Flower - Canvas Mounting Materials Canvas Stretching ImgSize: 16 W x 20 H.	\$18.50	RXFN00
1	154-1-5/8-A	Frame 1: 7.5 F, 16 1/8 Width, 20 1/8 Height. HF Brown Terrain	\$75.00	BCPT00
1	MVFC1.75	Stretcher Bar: 6 F, 16 Width, 20 Height. Standard Stretcher bar	\$22.50	RAPUX0
1	Fitting	1 hour(s).	\$36.00	BTPO00
0	Comments:	Total ImgSize: 16 W x 20 H in. Quote: 2263.	\$0.00	OPO00

1. Right click on the total amount
2. Select "apply discount" option

Estimated Time for Order Completion: 11 days (August-04-12)

Customer last visit was July-20-12 (3 days ago)

Phone: 403-541-1948 Name: Claudia e-mail: Change Customer Info

Address: my address Referred By: Location Currently Quote #: 2263

Order Description: Flower

Mount Type: Canvas

Image Measurement: Width: 16 Height: 20 inches

Glazing or Mirror: Claryl Glass

Fitting: 1 hour(s)

Mat Openings: 1

Comments:

Ready Made Frame Width: 16 Height: 20 inches

Frame 1 Style: 154-1-5/8-A

Top Mat: Select...

Mat Exposure: Width: 0 Height: 0 Diff Ratio:

More Options: OTHER Select...

Qty: 1 x 0

Quote X 1

Total: **\$159.60**

Amount Paid:

Amount Due: **-\$159.60**

GST: **\$7.60**

Item/Qty	ProductCode	Description	Total	Code
1	Canvas	Flower - Canvas Mounting Materials Canvas Stretching ImgSize: 16 W x 20 H.	\$18.50	RXFN00
1	154-1-5/8-A	Frame 1: 7.5 F, 16 1/8 Width, 20 1/8 Height. HF Brown Terrain	\$75.00	BCPT00
1	MVFC1.75	Stretcher Bar: 6 F, 16 Width, 20 Height. Standard Stretcher bar	\$22.50	RAPUX0
1	Fitting	1 hour(s).	\$36.00	BTPO00
0	Comments:	Total ImgSize: 16 W x 20 H in. Quote: 2263.	\$0.00	OPO00

A dialogue box will appear where you type-in the kind of discount you will apply. Then click the “Enter” button to process discount. Continue and press the button “Process Order” to create the invoice.

6.1.2. Invoices tab

Estimated Time for Order Completion: 11 days (August-04-12)

Frame Builder | Counter Sales | **Invoices** | Quotes | Order Status | Totals | Quantities | Sales Report

Invoice Number: 1322 | Invoice Status: 1 - To Do | Invoice Remarks: [Empty]

E-Mail Customer: Order is ready for pick up | Send E-Mail

Quote Number: 2262 | Add quote to invoice

Save Changes | Print Invoice

CustomerID	TotalPaid	Due	InvoiceTotal	GST	InvoiceDate	ProcessedBy	DateCompleted	InDays
755	\$0.00	-\$128.63	\$128.63	\$6.13	Jul 20, 2012 14:38	Claudia		0

ItemQty	ProductCode	Description	Total
1	Canvas	Flower - Canvas Mounting Materials Canvas Stretching ImgSize: 16 W x 20 H.	\$18.50
1	366-1-A	Frame 1: 7 F, 16 1/8 Width, 20 1/8 Height, HF Charcoal	\$45.50
1	MVFC1.75	Stretcher Bar: 6 F, 16 Width, 20 Height, Standard Stretcher bar	\$22.50
1	Fitting	1 hour(s).	\$36.00
0	Comments:	Total ImgSize: 16 W x 20 H in. Quote: 2262.	\$0.00

1. Right click on the Invoice Total amount
2. Select “apply discount” option

Estimated Time for Order Completion: 11 days (August-04-12)

Frame Builder | Counter Sales | **Invoices** | Quotes | Order Status | Totals | Quantities | Sales Report

Invoice Number: 1322 | Invoice Status: 1 - To Do | Invoice Remarks: [Empty]

E-Mail Customer: Order is ready for pick up | Send E-Mail

Quote Number: 2262 | Add quote to invoice

Print Invoice

CustomerID	TotalPaid	Due	InvoiceTotal	GST	InvoiceDate
755	\$0.00	-\$128.63	\$128.63	\$6.13	Jul 20, 2012 14:38

ItemQty	ProductCode	Description	Total
1	Canvas	Flower - Canvas Mounting Materials Canvas Stretching	\$18.50
1	366-1-A	Frame 1: 7 F, 16 1/8 Width, 20 1/8 Height, HF Charcoal	\$45.50
1	MVFC1.75	Stretcher Bar: 6 F, 16 Width, 20 Height, Standard Stretcher bar	\$22.50
1	Fitting	1 hour(s).	\$36.00
0	Comments:	Total ImgSize: 16 W x 20 H in. Quote: 2262.	\$0.00

A dialogue box will appear where you type-in the kind of discount you will apply. Then click the “Enter” button to process discount.

6.2. Discount on a single item

Two ways:

6.2.1. Frame builder tab

Estimated Time for Order Completion: 11 days (August-04-12) Caudia

Frame Builder | Counter Sales | Invoices | Quotes | Order Status | Totals | Quantities | Sales Report

Customer last visit was July-20-12 (3 days ago)

Phone: 403-541-1948 Name: Claudia e-mail: Change Customer Info

Address: my address Referred By: Location

Currently Quote #: 2263

Order Description: Flower
Mount Type: Canvas
Image Measurement: Width: 16 Height: 20 inches
Glazing or Mirror: Clear Glass
Fitting: 1 hour(s)
Mat Openings: 1

Ready Made Frame Width: 16 Height: 20 inches
Frame 1 Style: 366-1-A
Top Mat: Select...
Mat Exposure: 0 Width 0 Height Diff Ratio

More Options: OTHER Select...
Qty: 1 x 0

Quote x 1

Total: **\$128.63**
Amount Paid: 0.00
Amount Due: **-\$128.63**
GST: \$6.13

ItemQty	ProductCode	Description	Total	Code
1	Canvas	Flower - Canvas Mounting Materials Canvas Stretching ImgSize\16W x 20 H.	\$18.50	RXPNOO
1	366-1-A	Frame 1. 7 F. 16 1/8 Width, 20 1/8 Height. HF Charcoal	\$45.50	UEPNOO
1	MVFC1.75	Stretcher Bar. 6 F. 16 Width, 20 Height. Standard Stretcher bar	\$22.50	RAPLUX
1	Fitting	1 hour(s).	\$36.00	BTPOOO
0	Comments:	Total ImgSize: 16 W x 20 H in. Quote: 2263.	\$0.00	OPOOO

1. Select the item you need to discount by left-clicking the mouse
2. Right click on the item and select "Apply discount to this item"
3. Select what type of discount you'll apply (amount or percent)
4. Type amount and select "apply discount"
5. Process order

6.2.2. Invoices tab

Estimated Time for Order Completion: 11 days (August-04-12) Claudia

Frame Builder Counter Sales **Invoices** Quotes Order Status Totals Quantities Sales Report

Invoice Number: 1322 Invoice Status: 1.-To Do Invoice Remarks:

E-Mail Customer Order is ready for pick up

Customer: Phone: 403-541-1948 Name: Claudia e-mail: Address: my address Referred By: Location

Quote Number: 2262

CustomerID	TotalPaid	Due	InvoiceTotal	GST	InvoiceDate	ProcessedBy	DateCompleted	InDays
755	\$0.00	-\$128.63	\$128.63	\$6.13	Jul 20, 2012 14:38	Claudia		

ItemQty	ProductCode	Description	Total
1	Canvas	Flower - Canvas Mounting Materials Canvas Stretching ImgSize: 16 W x 20 H.	\$18.50
1	366-1-A	Frame 1: 7 F, 16 1/8 Width, 20 1/8 Height. HF Charcoal	\$45.50
1	MVFC1.75	Stretcher Bar: 6 F, 16 Width, 20 Height. Standard Stretcher bar	\$22.50
1	Fitting	1 hour(s).	\$36.00
0	Comments:	Total ImgSize: 16 W x 20 H in. Quote: 2262.	\$0.00

1. Select the item you need to discount by left-clicking the mouse
2. Right click on the item and select "Apply discount to this item"
3. Select what type of discount you'll apply (amount or percent)
4. Type amount and select "apply discount"

7. Counter Sales

Estimated Time for Order Completion: 11 days (August-04-12)

Frame Builder | Counter Sales | Invoices | Quotes | Order Status | Totals | Quantities | Sales Report

Qty: 1 T22646W Dark Walnut 4x6 Add

UPC: 050289226461

Qty	UPC	Description	UnitPrice	ExtendedPrice
-----	-----	-------------	-----------	---------------

Sub-Total: \$0.00
GST: \$0.00
Total: \$0.00
Amount Paid: 0.00
Amount Due: \$0.00
Done
Cancel

Use this option to process any photo frame on display. Just scan the bar code or enter the price code on the “UPC” bar. If more than 1 item of the same is being sold, adjust the amount on the “Qty” drop down menu.

Follow the same process if there are more than one style of photo frame being sold.

Press the “Add” button.

If you need to give a discount right click on the Total amount and select the type of discount to be processed.

Enter the amount being paid and click the “Done” button.

8. Order Status

Estimated Time for Order Completion: 11 days (August-05-12)									
Frame Builder	Counter Sales	Invoices	Quotes	Order Status	Totals	Quantities	Sales Report		
Select Order Status: 1 - To Do		View list of required materials		Select Columns to Print		Print			
1 - To Do									
OrderDate	Type	Description	CustomerPhone	CustomerName	InvoiceID	OrderStatus	Notes		
May 23, 2012 14:15	Select...	3 pieces - Select... Mounting Materials ImgSize: 26 7/8 W x 34 7/8 H.	403-208-0843	Glenn Agnew	1260	1 - To Do			
Jun 9, 2012 11:23	Float Mount	FT Visison Sttmnt - Float Mount Mounting Materials Float Hinge Mount ImgSize: 8 1/2 W x 11 H.	403-988-4940	Rizalyn Reyes	1282	1 - To Do			
Jul 5, 2012 10:35	Poster Dry Mount	Chrysler Building - Poster Dry Mount Mounting Materials Dry Mount on 3/16 Foamcore ImgSize: 19 5/8 W x 39 3/8 H.	403-616-2107	Mary McCorquod...	1317	1 - To Do			
Jul 5, 2012 18:05	JerseyPro	Inzaghi - #9 Jersey - JerseyPro Mounting Materials Soccer/Bball Jersey Shadow Box 2" ImgSize: 32 W x 40 H.	403-988-1064	Morgan Preece	1318	1 - To Do			
Jul 7, 2012 11:37	Paper Art	Waterloo Degree - Paper Art Mounting Materials Standard Tape Mount ImgSize: 13 W x 9 3/4 H.	226-339-1097	Ben Daniels	1319	1 - To Do			
Jul 7, 2012 15:15	Poster Dry Mount	Wedding photo - canvas print - Poster Dry Mount Mounting Materials Dry Mount on 3/16 Foamcore ImgSize: 15 W x 21 3/4 H.	403-771-5464	Pat Galloway	1321	1 - To Do			
Jul 20, 2012 13:40	Canvas	Flower - Canvas Mounting Materials Canvas Stretching ImgSize: 16 W x 20 H.	403-541-1948	Claudia	1322	1 - To Do			

Basically this tab is to check the status of all invoices. It helps when doing the weekly ordering and to keep track of what's been done, ordered, what materials have been received and what's in progress.

This sheet can be printed to keep track visually.

To change the status of an order, you can either go directly to the invoice and change its status:

Estimated Time for Order Completion: 11 days (August-05-12)

Invoice Number: 1260

Customer: Glenn Agnew, Phone: 403-208-0843

Invoice Status: 1 - To Do

CustomerID	TotalPaid	Change	InvoiceTotal	GST	InvoiceDate	ProcessedBy	DateCompleted	InDays
723	\$86.72	\$0.00	\$86.72	\$4.13	May 23, 2012 14:16	Claudia		

ItemQty	ProductCode	Description	Total
3	Select...	3 pieces - Select... Mounting Materials ImgSize: 26 7/8 W x 34 7/8 H.	\$0.00
3	Clear Glass	Glass: 26 7/8 Width, 34 7/8 Height. Premium Clear Glass	\$50.19
3	Fitting	1/4 hour(s).	\$32.40
0	Comments:	Total ImgSize: 26 7/8 W x 34 7/8 H in. Quote: 2178.	\$0.00

Or you can change it in the Order Status tab by selecting the invoice and right clicking on it:

Estimated Time for Order Completion: 11 days (August-05-12)

Select Order Status: 1 - To Do

OrderDate	Type	Description	CustomerPhone	CustomerName	InvoiceID	OrderStatus	Notes
May 23, 2012 14:15	Select...	3 pieces - Select... Mounting Materials ImgSize: 26 7/8 W x 34 7/8 H.	403-208-0843	Glenn Agnew	1260	1 - To Do	
Jun 9, 2012 11:23	Float Mount	FT Visison Sttmnt - Float Mount Mounting Materials Float Hinge Mount ImgSize: 8 1/2 W x 11 H.	403-988-4940	Rizalyn Reyes	1282	1 - To Do	
Jul 5, 2012 10:35	Poster Dry Mount	Chrysler Building - Poster Dry Mount Mounting Materials Dry Mount on 3/16 Foamcore ImgSize: 19 5/8 W x 39 3/8 H.	403-616-2107	Mary McCorquod...	1317	1 - To Do	
Jul 5, 2012 18:05	JerseyPro	Inzaghi - #9 Jersey - JerseyPro Mounting Materials Soccer/Bball Jersey Shadow Box 2" ImgSize: 32 W x 40 H.	403-988-1064	Morgan Preece	1318	1 - To Do	

EOF