

A. Install Your Moulding Vendors

From the **Main/Menu screen**, click on the **Moulding** button.

2. Next, click on the **Vendors** button, (left).
3. Click on the **Add Vendor** button, (lower left).
4. One by one, double click on the vendors you wish to install.
5. After all vendors have been selected, click the **EXIT** button on that selection screen.
6. Click on the **Update From Web** button.
7. Type in your current Internet password then click Connect.
8. When the update is complete, a list of companies with their new mouldings will display.
9. Click on the **Save and Exit button**, (lower right).

B. Set Up Your Moulding Markup Chart

At the bottom of your Add/Price Vendors screen is your Moulding Markup Chart.

Set your sliding scale markup chart any way that you wish.

1. You can either adjust the default scale that is already set up in the system or you can set it up from scratch.
2. Set the price ranges From and To then set the times markup associated with that price range.
3. Once your scale is set, you will need to click on one of the Markup Buttons located in the bottom right hand corner of this screen.
4. You can set up all of your vendors with the same markup, set them all with different markups or you can just apply the default markup to any of your vendors.

C. Install Your Mat Vendors

Most of your mat vendors will automatically be installed when you install LifeSaver Software. Follow these instructions if you need to add any new mat vendors.

1. From the **Main/Menu screen**, click on the **Mat** button.
2. Next, click on the **Vendors** button, (left).
3. Click on the **Add Vendor** button, (lower left).
4. One by one, double click on the vendors you wish to install.
5. After all vendors have been selected, click the **EXIT** button on that selection screen.
6. Click on the **Update From Web** button.
7. Type in your current Internet password then click Connect.

8. When the update is complete, a list of companies with their new mouldings will display.
9. Click on the **Save and Exit button**, (lower right).

D. Set Up Your Mat Markup Chart

1. You can either adjust the default scale that is already set up in the system or you can set it up from scratch.
2. Set the price ranges From and To then set the times markup associated with that price range.
3. Once your scale is set, you will need to click on one of the Markup Buttons located in the bottom right hand corner of this screen.
4. You can set up all of your vendors with the same markup, set them all with different markups or you can just apply the default markup to any of your vendors

E. Configure

After you have installed your mat and moulding prices, you will now need to set up some shop and financial information. We are going to cover only the main items on this screen for now. Please consult your User's Manual for more information

1. Go back to your **Main/Menu** screen.
2. Click on the **Configure** button.
3. Fill out your **TAX** information under the 'Financial Tab'.
4. **PRINTING TAB** (top right). Choose your Default Printer: set that a Generic.

On the bottom portion of the screen we suggest you select:

- * Print Tear off on Workorder
- * Print Framing Subtotals on Quote
- * Print Disclaimers on Invoice
- * Print Tear Off on Art Copy

Also if you need a signature copy for your business, type in '2' for the number of Invoice copies you would like to print.

5. **Backup TAB** – Type in the Drive letter and select a drive type. We suggest using a USB Device. Go into My Computer to see what letter Windows has assigned to that drive. Next, go into Your Lifesaver program. Click on the Closing button, set the backup drive letter to the correct letter and set the backup type to Hard Drive. Now all of your backup files will be able to fit on that Thumb Drive.
6. **CMC TAB** – If you use a computerized matcutter check the box for the appropriate cutter.

ASSIGN PASSWORDS AND PRIVLEDGES:

If there are certain areas of the program that you don't want your employees to get into or if there are access that you can't get into but would like to:

1. From the Main/Menu screen, click on Configure.
2. Click on the FILE drop down menu and select Assign Passwords.
3. Click on the LIST button at the bottom of the screen.
4. There you will see the Usernames that are already set up in the program.
5. Highlight the Username you wish to adjust and press your ENTER key.
6. In the middle of the screen are (13) buttons. These represent different parts of the program.
7. If you needed access to the 'Void Invoice' option, for example, and that option was not available, click on the QUICKSALE button then check the box next to 'Delete Invoice'.
8. When finished click OK then click the Quit button to return to the Configure page.

SETUP SALESPERSONS INITIALS:

If you would like to require your sales people to enter their initials on the Invoice screen:

1. Starting from the **Main/Menu**, click on Configure then click on the '**Options**' tab.
2. Click on 'Require Salespersons Initials' (right hand column).
3. Next, click on the **FILE** drop-down menu from the Configure page and select Define Employees.
4. Type in the Employees full name and initials then click the **ADD** button.
5. Repeat this process for each employee.
6. When finished, click Quit then click **SAVE** at the bottom of the Configure screen.

F. Customize And Price Your Program Options

LifeSaver allows you to customize your ticket screen options so that you can charge for the items you sell. In this section you can go through each category and rename items that you don't use and change them to something that you will need.

1. Start at the Main/Logo screen.
2. Click on the Price button.
3. Click on the Name button next to the category you wish to modify.
4. Highlight any of the names that are in the list change them to whatever you need.
5. After you have all of the items named the way you want them, click the done button.
6. Repeat this process for all of your various categories, Tru Vue Glazing (Price only), Other Glass, Mounting, Stretching, etc.

Once you have customized your program by naming all of these items, you will now go through and price each price card in each of these categories.

To Set up new pricing: Start by clicking on the Price button next to the category you wish to price. Click on the File menu and select Display Cards and select the appropriate card.

1. Click on your file menu, select Price By U.I. Enter the price per United Inches, then click OK.
2. Do you want to replace current pricing? Click (OK). The entire chart will be filled out at once.

To Change your prices: Start by clicking on the Price button next to the category you wish to price. Click on the File menu and select Display Cards and select the appropriate card.

1. Click on the file menu and select Adjust Pricing.
2. You can either adjust your prices or you can set a flat rate charge to your price cards.
3. To adjust your prices, click on either raise or lower, type in the percentage amount then click OK.
4. To set a flat rate charge, just type in the dollar amount into the “Set All United Inches To” field then click OK.

There is more information concerning customization and pricing in the Price section in you User’s Guide.

ACTIVATE 5.0 PRICING METHOD FOR SPECIALS:

1. From the Main/Menu Screen, click on Configure.
2. From the Configure screen click on the Options tab.
3. Check the box to enable ‘Use 5.0 Pricing Method For Specials’.

USING SPECIALS IN THE FRAMING ORDER SCREEN:

1. From the **FRAME-IT** screen:
2. Hover over any special in the list to check price appropriate for this size piece.
3. Check the Box for a quantity of one.
4. **RIGHT CLICK** on any special for multiple quantities of this same item.
5. Price will appear in the **SPECIALS** box on the right side, and on the work order.

ADDING A NEW SPECIAL ITEM TO THE DATABASE:

1. From the Main/Menu, click **PRICE**.
3. Click **SPECIALS > PRICE**.
4. Click **ADD SPECIAL**.
5. Enter a name for this new special.
6. Select pricing method: *Square Inch, United Inch, or Per Unit*

Name	Cost By...	Cost	Markup	Retail	Min Price	Type	Position	Item No.	Reminder Message
+30min Labor	Per Unit	30.00	1.00	30.00	30.00	<input type="radio"/> Material <input checked="" type="radio"/> Labor	1		Right click to increase qty. +30 mins each
1/4" GI Spcr	United Inch	0.25	1.00	0.25	7.50	<input checked="" type="radio"/> Material <input type="radio"/> Labor	2		
V-Groove	United Inch	0.18	1.00	0.18	6.00	<input type="radio"/> Material <input checked="" type="radio"/> Labor	3		For multiple VG's, right click and change QTY
BrushStrokes	Square Inch	0.44	1.00	0.44	12.50	<input type="radio"/> Material <input checked="" type="radio"/> Labor	4		
Shrink Wrap	Square Inch	0.28	1.00	0.28	8.00	<input checked="" type="radio"/> Material <input type="radio"/> Labor	5		Note: Maximum width 28" for our equipment!
Sm Br Plate	Per Unit	8.00	2.00	16.00	16.00	<input checked="" type="radio"/> Material <input type="radio"/> Labor	6		Max 15 letters. Note plate text in COMMENTS

7. Enter wholesale cost for this item.
9. Enter markup factor ex: 3.
10. (Optional) Enter minimum selling price.
11. Select type of **MATERIAL** or **LABOR**.
12. (Optional) Enter **REMINDER MESSAGE**. ex: *This brass plate can have a max of 15 characters.*
13. Click **SAVE** when finished.

NEW GLASS ITEMS:

If you are a long time Lifesaver customer and you were running version 4.49.0 there will be a change to your glass pricing and options. When you go to write a new Framing Order you will see (5) glass options in the middle of the Framing Order screen. The new program update contains all of Tru Vue's glazing options. The Default option is **CONSERVATION CLEAR**. All of your **OLD** glass options and prices are still in the system. To select any of your old glass options, click on **OTHER GLAZING** and from the next window, click on **OTHER** (right hand column).

If you need to select **NO GLASS EX: Framing A Canvas**, just click on the 'Conservation Clear' button on the Framing Order screen and the program will erase any glass pricing.

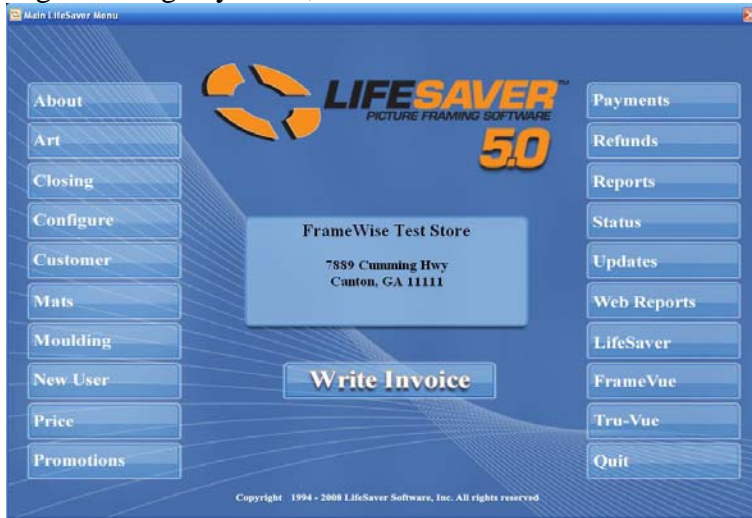
If you wish to use the Tru Vue glazing option, we recommend that you;

1. Go to the Main/Menu screen and click on **PRICE**.
2. Click on the Price button on the same line as Tru Vue Glazing.
3. Select a glazing type from the glass drop-down.
4. Click on **ADJUST PRICING** and either Raise or Lower the existing prices.
5. Do this for each of the glazing options to ensure accurate prices.

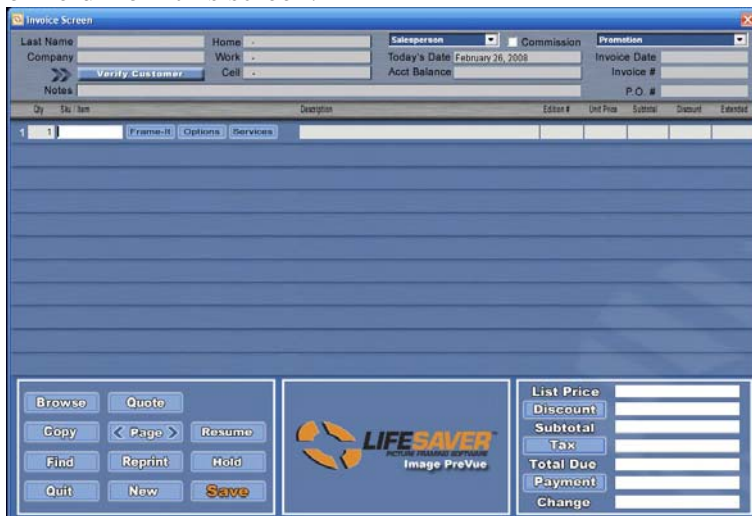
G. Framing Orders

LIFESAVER SOFTWARE VERSION 5.0 has the ability to combine your Custom Framing orders, Gallery items, Production pieces, Lieberman's prints and DigitalCustom orders all on a single invoice. The **VERSATILITY** of the new **SINGLE SCREEN** format makes the order writing process easier and more efficient. Screens have changed on almost every section, but the **FUNCTIONALITY** has remained the same. In most cases the main difference will be the positioning of the selection buttons. Instead of being on the bottom of the screen, they will be along the **LEFT** hand side going from **TOP** to **BOTTOM**. The primary differences are discussed below. **PLEASE READ** this information if you are ready to or already have updated to Version 5.0*.*.

The 1st screen in Lifesaver will be referred to in the new documentation as the **MAIN/MENU** screen. This is the screen with all of the various buttons along the left and right hand sides. To begin writing any order, click the Write Invoice button.



The 2nd screen will be referred to as the **INVOICE** screen. All orders will be written and saved or held from this screen.



The 3rd screen will be referred to as the **FRAMING ORDER** screen. All Custom Framing orders will be written on this screen and saved to the Invoice screen.



SPECIAL NOTE: (For Customers That Are Converting From Version 4.49.0)

A) All of your existing **WORK ORDERS** and **QUICKSALE** items have now been assigned new **INVOICE** numbers. All **NEW** orders will also be assigned invoice numbers. The **STARTING POINT** for any order will be the 'Invoice Screen'.

B) If you want to find any **OLD** or **CURRENT** orders you will need to click the **FIND BUTTON** in the lower left corner of the 'Invoice Screen'. If you would like to find any old Framing Orders for either **VIEWING** or for creating a brand **NEW** order, you can still go to the 'Framing Order Screen' and either **BROWSE** or **FIND** an old work order from there.

C) All **OLD HOLD** orders can also be found from the 'Framing Order' screen. If you want to find an **OLD** hold order, click on the "Frame It" button from the **INVOICE SCREEN**, click **BROWSE** ticket, do a search using the customers **LAST NAME**, pull the order onto the Framing Order screen. Next, click on the **FILE** drop-down menu and select **COPY** Ticket then you can **SAVE** this new Framing Order to the **INVOICE** screen.

D) DO NOT pull up an Old Invoice from the **INVOICE SCREEN** and then try to look up **OTHER WORK ORDERS** from the **FRAMING ORDER SCREEN**. You can **VIEW** the work order that is on that invoice, but you can **NOT CHANGE** that work order unless you want to do a **Full Edit** on that Invoice and **CHANGE** the framing order itself.

TO BEGIN THE ORDER WRITING PROCESS:

1. Start from the **MAIN/MENU** screen and click on the 'Write Invoice' button.
2. This will take you to the '**INVOICE**' screen. This was formally known as the '**QuickSale**' screen.



3. Type in the Customers' **LAST NAME** (top right) then click on the Verify Customer button.

4. This will **BROWSE** your customer files. If the customer is in the database, click on the customer name then click '**Select Customer**'.
5. If they are **NOT** in the database, click on '**Add Customer**'. Either way, verify the customer record and make sure **ALL** of the information is entered.
6. When complete, click on '**Sales Screen**'. Once on the Sales Screen you have eleven line items per page.
7. If you are entering a **GALLERY** or **ART** item, you can either enter the item number (if you have already set up your Art/Gift Inventory) or you can just type in the Quantity, Description and Unit Price.
8. If you wish to create a **CUSTOM FRAMING ORDER**, you will click on the 'Frame It' button. This will take you to the 'Framing Order' screen.
9. **SAMPLE ORDER**: Tab to the **IMAGE SIZE**, type in a size, EX: **14.5** by **16.75**. Remember to use your **TAB** key to move from field to field.
10. Next, type in a **MOULDING** number in the first moulding field, EX: **L335WO**. Go to your **TOP MAT WIDTH** field and type in **4** then tab to the first **MAT/FILLET** field. The other sides will automatically get filled in.
11. Type in a Mat number EX: **C1609**, tab then type in another Mat number, EX: **C1551**.
12. Now select a **REVEAL** for your bottom mat.
13. Click on the **FRACTION** below the second mat number and select $\frac{1}{4}$ then click OK.
14. Type in a **TITLE, W/O NOTES** and **ART LOCATION** (optional).
15. Select anything that you want from the **SPECIALS** section.
16. Go to the **OPTIONS** section and select a **MOUNTING** and **GLASS** type.
17. Click on the **SAVE** button (lower right). This will take you back to the '**Invoice**' screen with the quantity, description, unit price and extended price filled in for that custom order.

If you have **MULTIPLE** Custom Framing orders for the **SAME** customer you will follow a similar process. The difference is that when you click on the 'Frame It' button from the **INVOICE** screen, you will write up the first order and instead of clicking on the **SAVE** button, you will click on the **REPEAT** button.

The image shows a software interface with a blue background. At the top, it says 'Total Due this order' followed by a white input field. Below this are four buttons: 'Cancel', 'Clear', 'Repeat', and 'Save'. Under the buttons, there are two more input fields: 'Quantity' with the number '1' and 'Acct Balance' with an empty field.

This will **TEMPORARILY** store the first order then you will be asked if you want to **CLEAR** or **KEEP** the information for your **NEXT** order. If you click on **CLEAR**, the Framing Order screen will reset to a **BLANK** order screen for your next order. If you click on the **Keep** button, the information from the previous order will **CARRY OVER** to the Next Framing order. This option is especially helpful when you have a number of orders that are similar. You can continue to use the **REPEAT** process for as many orders as you need. When you have completed the '**Last**' order, you will click on the **SAVE** button and then program will **TRANSFER** all of your custom framing orders on to the 'Invoice' screen. A **LINE ITEM** will be created for each order

with all of the necessary information. The actual work order number will **DISPLAY** on each line item after the Order has been **SAVED** for future reference.

FIND INVOICE:

1. Starting from the Lifesaver **Main/Menu** screen click on **Write Invoice** (lower center).
2. Click on the **FIND** button (lower left).
3. Search by Work Order number, Invoice number or Last Name.
4. Highlight the desired order then either click **Continue** or press your **ENTER** key.
5. Once this item has been displayed, you can view work orders associated with this invoice or you can **EDIT** the order so that you may modify the order in some way.

POP-UP CALENDAR FOR DUE DATE:

1. Starting from the Framing Order screen, click on the small drop-down arrow to the right of the **DUE DATE**.



2. A scheduling calendar will pop up. This will make it easier to select due dates.
3. You can also click the arrows at the top of the screen to go back and forth from month to month.
4. Make sure you do NOT select a day prior to the current date.

EDIT ORDER:

Once you find an existing Invoice you may Edit this invoice in a number of ways.

A) VIEW ORDER ONLY – This will allow you to view an existing order, but you can not change anything on this order or view other framing orders.

B) EDIT WITH PRICE LOCK – This will allow you into an existing Framing Order and will allow you to modify the order, but the program will retain the same pricing that was on the original order.

C) EDIT COMMENTS ONLY – This will allow you into the order to edit the Title or Work Order notes only.

D) INVOICE FULL EDIT – This will allow you into the order with full editing privileges. Be aware that the price of items on this order will change if you have updated pricing or if you change any of the materials on this order. After you **EDIT** a framing order, click **SAVE** to go back to the Invoice screen then click **SAVE** again to save the changes to that particular invoice.

HOLD ORDERS:

Lifesaver 5.0 has a new section specifically for **HOLD** orders. This will make it easier to Hold Orders, Save Proposals and Create new orders. You can use your hold items (especially if you do production work) over and over.

1. Start by creating a Framing Order then save that order to the Invoice screen.
2. Click on the **HOLD** button. (You may want to print a **QUOTE** before you hold).
3. Select a Customer to assign this order to.
4. Type in a Comment for this Hold order or Proposal then click Save.
5. Orders are also **TIME STAMPED** for reference purposes.
6. If you do a lot of Production work, you can hold any number of orders under the **SAME** Customer Name. When you retrieve that customers Hold items, you can click on as many items with in that “Proposal” and save them all at the same time to the **INVOICE** screen.

HOW TO SUSPEND AN ORDER THAT IS IN PROGRESS:

Example: If you are writing an order for a customer and they have a number of projects. If you need to use the computer for something else ex: *To accept a payment*. The Suspend/Resume feature will make that process more efficient.



1. Start with a new Invoice then click the **FRAME-IT** button.
2. Write up a Framing Order then click the Repeat button.
3. At any time during the repeat process with as many orders as you wish, you can click the **SAVE** button and transfer the existing orders to an Invoice.
4. Click the **SUSPEND** button and enter a Comment then click **SAVE**.
5. Once you are finished using the computer for the other task, you can click on the **RESUME** button>Click the line item for the order that you want > Click Resume (bottom).
6. This will take you back to the Invoice screen, so that you can continue with that same order.

DELETE LINE ITEMS ON AN INVOICE:

If you are in the process of writing an order and you need to delete a single line item from the Invoice screen, click on the **OPTIONS** button on that line item and select ‘Delete This Line Item’.

VOID AN ENTIRE INVOICE:

1. If you need to **VOID** an entire invoice, you will need to start by finding the Invoice.
2. Start from the Invoice screen, click on the **FIND** button.
3. Search by **W/O** number, Invoice number or Last name.
4. Once the order is displayed, click on the **FILE** menu drop-down and select Void Invoice.

H. Accept Payment

PAYMENTS:

1. **ALL** payment will be made through this payment screen. You can either click on Payments from the Main/Menu screen or click on the Payment button (lower right) from the Invoice screen.
2. Click on 'Only Show Customers With Balances'.
3. Click on the Customers Last Name and select customer.
4. Either enter the payment amount on each line item or use the Buttons at the bottom of the screen.
5. Select the 'Payment Type'. You can use the 'Pay Half', 'Pay All' or 'Multi-Pay' buttons or if you use **POWER PAY** you can use the Manual PP Txn button.
6. After you have selected the payment type and amounts, click on 'Apply Payment'.
7. Other options on this screen are; **A)** Payment History – View and or Print a customers payment history. **B)** Statements – Include any and all items from past or existing orders to create a Statement of Account. **C)** Workorder Status – Check order status. Mark orders as Done/Delivered.

The screenshot displays the 'Accept Payment' window. At the top, there are fields for 'Last Name' (smeltz), 'Company', 'Salesperson', 'Commission', 'Promotion', 'Today's Date' (February 27, 2008), 'Invoice Date', 'Invoice #', and 'P.O. #'. A 'Verify Customer' button is visible. Below this is a table with columns: Invoice #, Description, Ord Amt, Balance, Payment, and Details. The first row contains: 1000, test, 10.50, 10.50, 0.00, and Details. At the bottom of the window, there are several buttons: 'Manual PP Txn', 'Pay Half', 'Pay All', 'Multi-Pay', 'Apply Payments', and 'Cancel'. The 'Pay Type' is set to 'Paid'. The 'Total Due' is \$10.50 and 'Total Payment Entered' is 0.00.

I. Hardware Requirements And Settings

- *Windows XP Home or Professional
- * 2.0 Ghz Computer or Higher.
- * 2 Megs of Ram.
- * 17" SVGA Monitor.
- * High speed Internet Access – preferably high speed (DSL or Cable)

* Recommended: Any HP Laser Printer

Set up your Monitor Properties: Close your Lifesaver program.

1.) **Right click** on a blank area of your Monitor. 2.) Select **Properties**. 3.) Click on the **Settings** Tab. 4.) Set your **Screen Resolution** to 1024 x 768. Set your **Colors** to 32 High Color. Click on the **Advanced** Button and set the Fonts to Small or Normal (**96DPI**). Click the apply button then click OK. Do you want to keep these settings? **CLICK YES**

J. Set Up Your Internet Options

In order for your automatic downloads to work properly, it may be necessary to set up some default settings within you **Internet Options** section which is located in your computers **Control Panel**.

1. Click on your **START** button on your taskbar.
2. Select either **Settings>control panel** or just **Control Panel**.
3. Double click on **Internet Options**.
4. Click on your **Connections** tab.
5. If you have a dial up connection, make sure there is a default setting for your ISP then make sure the button that reads, “**Always Dial My Default Connection**” is checked.
6. If you have a high speed connection, click on **LAN Settings** and make sure that you check the box the reads, “**Automatically Detect Settings**”.

If you still can't use the automatic update feature in your LifeSaver program then you may have an issue with a **Firewall** that is installed with your computer. If it is **Norton Security**, you should be able to disable the program. Click on your **START** button on your **TASKBAR**, go to **Programs**, click on **Norton Security**, select **OPEN** then turn Norton **OFF**. Do your updates then go back in and **enable Norton** again. If it is one of many different types of **Firewalls** that is preventing you from doing updates, you will need to contact your **System Administrator** to allow your **ISP** to connect through your Firewall.

Special Note: If you have **Windows XP Service Pack II**, you will need to go to **START>Settings>Control Panel**.

1. Double click on **Windows Firewall**
2. Go to the **Exceptions** tab and select **Add Programs**.
3. Scroll down the list of programs, click on **LifeSaver Software** then click **OK**.
4. Click on the **General** tab at the top of the screen and click on the **ON** button.

If you are still having problems, you will need to call your computer or Windows support desk.

K. Internet Access: Download Vendor and Program Updates.

Your LifeSaver Software comes with the ability to do **live updates** through the internet in order for you to get all of your **vendor** and **program updates** automatically. You have to have **internet access** on your **Main LifeSaver computer**. It is best if you have a high speed access (**DSL or Cable**) but you can still use a dial up service.

1. Starting from the LifeSaver **Main/Menu** screen, click on the **Update** button at the bottom of the screen.
2. Type in your **internet password**, this will be provided to you when you get your program and will be updated **via e.mail** when the password is changed.
3. Check the boxes that you wish to update, **Mats, Mouldings or Program** updates then just click the Start Update button at the bottom of the screen.
4. LifeSaver will automatically connect to your **ISP**. If you get a message that reads, **“Unable to establish connection to server”** or something similar, refer to **section (K)** In this manual.
5. After your downloads are complete, you will get a **Moulding review screen** that will show you all of the changes to your moulding database. You can **print** out a list of all of your **deleted mouldings**. We recommend that you click on the button to **remove your discontinued mouldings** then click on the **SAVE and EXIT** button.
6. Next, you will get a **Mat review screen**. This will give you the same type of information. Remove you discontinued mats then click on **SAVE and EXIT**.
7. If you have **checked the box to update you program files**, you will be prompted to start your program update. Your LifeSaver program will automatically be **shut down** and you will be **prompted** to start your **program update**. Follow the prompts for your installation. When it is finished, **LifeSaver will automatically restart**. If you have a **network of computers**, all of your **client** computers will be automatically updated when you restart each one of them. Just **follow the prompts** to update your client computers.

That’s it! Now all of your vendors are up to date and you will be running the most current program features. We recommend that you use you **Update Center twice a month** to insure all of your information is kept current.

L. *Daily Closing Options*

You should run your **Daily Closing Reports** every day. This section of your software will give you your **financial information, material reports, billing statements** and will allow you to backup your LifeSaver program to protect against the loss of any of your data.

1. Starting from the **Main/Logo** menu screen.
2. Click on the **Closing** button.
3. From this screen you have a number of options.
4. The options we highly recommend that you perform on a daily basis are **End Of Day Reports** and **Backup**.

CLOSING REPORTS:

For any customer that was using the Sales Journal for tax information, that report is no longer available. That has been replaced by some New Closing Reports.

1. From the Main/Menu screen, click on CLOSING.
2. Very much like the old closing screen, check or uncheck the boxes for the reports you wish to run. We recommend 'End Of Day' and 'Backup' everyday.
3. When you click the START CLOSING button you will get a similar PREVIEW screen. This screen will show you only the current days' transaction. This screen is NOT editable. If you need to make adjustments to your books, you will need to either run Refunds or Edit orders to adjust 'Payments' or 'Payment Types'.
4. When you click the CONTINUE button, all of your Closing Report options will display.
5. The Top portion shows Daily Report options and the bottom portion shows Monthly Report options.
6. You can select a Date Range to print or reprint any date(s) that you wish.
7. *You can also get to the reports from the reports screen.*

A) Print Daily Detail:

Report Summary Page – This is basically the same report as the ‘Closing Summary and Bank Deposit’ report that was in the previous version.

Order Summary Report – This will give you a report on all orders written for a specific day regardless of payment.

Paid In Full Report – This report is for all orders that on a specific day were Paid In Full. They could be paid in full on that day or they could have had prior deposits and today were now paid in full.

Payment Summary Report – This report will list all payments for a specific day regardless of whether they were paid in full or not.

B) Print Monthly Summary:

Order Summary Report – All orders written for a specific month. For tax purposes – Use this report if you pay taxes on all orders written regardless of payments.

Paid In Full Report – All orders paid in full for a specific month. For tax purposes (Accrual Based Accounting). Use this report if you only pay taxes on orders that are Paid In Full. This report would be used in place of the **OLD SALES JOURNAL**.

Payment Summary Report – All payments made during a specific month. For tax purposes (Cash Based Accounting). These are all payments made during a specific month regardless of whether they have been paid in full or not.

NOTE: Daily reports and Monthly Summary reports may now be run as many times during the day as needed.

DELIVERED AND UNDELIVERED REPORTS:



Lifesaver now gives you Delivered and Undelivered order reports. From your calendar you can still print Work Order 'To Do' and 'Completed' lists. Now when an order has been picked up by your customer, you can mark that order as Delivered.

When an Invoice is Paid in Full you will have a new prompt, "Would You Like To Mark This Order As Delivered". (Yes/No). Please be sure to select the appropriate option.

If you choose 'NO' when the item is paid in full you can still go back and mark orders as delivered.

1. From the Invoice screen, click on PAYMENT.
2. Select a customer and bring up their account balance.
3. Click on the Workorder Status Tab and from there you can mark orders as done and delivered.

***A**gain, thank you for choosing LifeSaver Software. You are now ready to start using your new program. We recommend going to your Framing Order Screen and start practicing with your order writing. For more information on all aspects of your program, please read your User's Guide.*