

FrameReady Setup Guide

Congratulations! You have a powerful pricing and management software: FrameReady. So, let's get your software set up and ready for you to use.

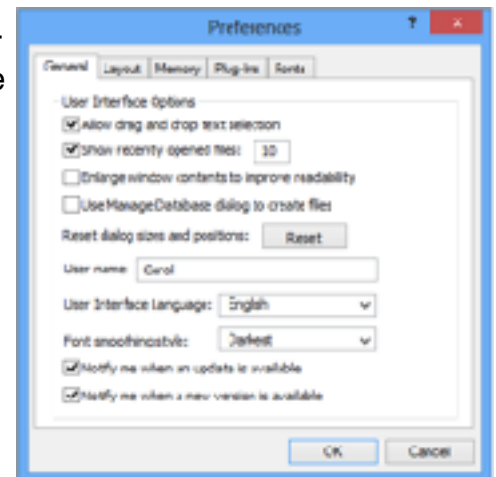
AFTER OPENING FRAMEREADY SOFTWARE:



1) When you open FrameReady, a message may appear "FileMaker cannot share a file because network sharing is turned off". To stop this message from re-appearing each time you open the computer, click on the Set Up Data button in the top right corner. Click on the Network tab. Select 'Set Files to Single User' button if you are only using FrameReady on one computer. If you are using more than one computer, you will need to enter the network key provided to you in the installation email. Then click the button to 'Set Files to Multi User'.

2) Each time you open FrameReady, you will need to enter your Account and Password. To speed up this process, you can have the Account autofill with a level and then you just enter your password.

On Windows: Open with the level4 password. Click on Perform (in the menu bar at the top of the screen) and select Restore Full Menus from the pulldown menu. Click on Edit menu and select Preferences. In the User name field, enter your level. Eg. level2



On Macintosh: Click on FileMaker Pro on menu in top left corner and select Preferences. Under the General (tab), in the User Name section, click in the Other field and enter your level. Eg. level2

Your Accounts and Passwords are attached to the installation email as a pdf.

3) Auto Zoom - Click on the Auto Zoom box in the lower left corner. If your screen resolution is capable of enlargement, the screen will resize to a larger view. If not, read these [instructions](#) or view on web: [How to set up full screen view](#).

A screen resolution of 1024 x 768 or 800 x 600 may be used for working with FrameReady. The higher resolution allows for more records to be displayed when in a list view. You should not have to scroll up or down to view any of your FrameReady Form View screens.



On Windows, it is recommended that the task-bar not be selected to be always on top of other applications. To deselect this option, do the following:

1. Click **Start** button > **Control Panel** > **Task-bar & Start Menu**.
2. Uncheck the **Keep the Task-bar on top** of other windows option.
3. Click **OK**.

4) Date/Time - If the following message appears, "The date and time formats are different than the current system settings", select File Settings. This message will appear when opening FrameReady until you change the system settings in your computer.

Change format in Windows: <http://frameready.com/know/file-settings-vs-system-settings-on-windows/>

Change format in Macintosh: <http://frameready.com/know/file-settings-vs-system-settings-on-macintosh/>

Below is a CHECKLIST to help you set up your program. To learn how to do any of the items on the list, click on the item in the list to view that section of the document. Print this page and check off the sections which have been set up.

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Check List Details

A) INITIAL SETUP

a) Your Business Information

Main Menu > Setup Data button

Check business name, fiscal year start date, and tax rates.

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b) Enter Logo

Main Menu > Setup Data button > **Logo** tab

Set up your logo (*TIFF or JPEG format*) which appears on PDF files, Letters, Envelopes, and Work Order Summaries. It will be re-sized automatically to fit all documents.

1. Click **Main Menu > Setup Data > Logo** tab.
2. Click **Import Picture** button.
3. Select the file. Your address and phone numbers should be included in the image. Be sure there is no X in this box.

Tip: When preparing the image file, be sure to crop any white space around the image as this will affect the size of the logo on your documents.

4. Click **Done**.



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c) Enter Disclaimers

Main Menu > Setup Data button > **Footnotes** tab

These disclaimers appear on printed forms only: Work Order, Blind Estimate, Invoice, Statement, and Gift Certificate documents. They may be changed at any time for advertising purposes, etc.

How to edit the footnotes:

1. Click **Main Menu > Set Up Data > Footnotes** tab.
2. Type whichever text you wish in the block. The text is limited to the space available.

If defaulting your printed customer documents to French or Spanish then these footnotes may be typed in those languages.

3. Click **Done** to exit.



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d) Setup Email

**Main Menu > Set Up Data button
> Email tab**

Use this section to set up your automated email messages with FrameReady.

1. Email Client: Chose the option you prefer to use for sending email by clicking the appropriate radio button.

Client: Select Client to send FrameReady emails (e-blasts, pick up notifications, etc) using third party client software (Outlook, Mail, etc).

If Client option is chosen click Done. FrameReady will then launch your email program such as Outlook, or Mail.

SMTP: Select SMTP to send email directly from FrameReady. You may need to contact your ISP or Email provider for the information in order to fill in fields 2-12. Some of the popular providers are included as Pre-sets.

2. Load Pre-set: From the drop-down menu, choose the web based service you use.

3. Name: This may be your shop name or personal name.

4. Email Address: Remove "example" and enter your address.

5. Reply to Address: This can be the same as the above address or a different one.

6. Auto-enter CC: If you wish to have all sent emails copied to another address, enter the address here.

7. SMTP Server: If unsure, contact your ISP or email provider.

8. SMTP Port: If unsure, contact your ISP or email provider.

9. Encryption: If unsure, contact your ISP or email provider.

10. Authentication: If unsure, contact your ISP or email provider.

11. Username - Remove "example" and enter your email address.

12. Password - Enter the password used to access your email account.

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Select Client to send FrameReady emails using third party client software (Outlook, Mail, etc.). To send email directly from FrameReady, choose SMTP. You may need to contact your ISP or Email provider for the proper SMTP settings. Some of the popular providers are included as Pre-sets.

e) Vendors Installed

Main Menu > Update Vendor Pricing (pink section, lower right)

Check to see if all of your vendors are installed. If you need to add one, click on the tab at the top for your country. To remove a vendor from the list, click on the teal **Remove** button on the far right.

Click on the Printer icon in the top right corner of the screen to print a list showing the codes for entering moulding and matboard. (Moulding usually has a suffix and matboard usually has a prefix.)

Click the link to learn more: [Vendor Pricing Update screens](#)

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Click on the Vendor you wish to update or add									
New Updates My Vendors Add USA Vendor Add CDN Vendor Other Vendors Vendor Codes Notes NEW									
Update All Vendors									
Vendor	Group	Validation Date	Last Updated	Vendor ID Number	Prefix	Suffix	Options		
Nelson's Moulding & Frame	USA	Moulding	2/18/2016	223	a.NFL		Options	Remove	
Husko Creations	USA	Moulding	2/18/2016	364	a.NTC		Options	Remove	
Studio Moulding	USA	Moulding	2/18/2016	263	a.ST		Options	Remove	
Valley Moulding & Frame	USA	Moulding	2/18/2016	273	a.VY		Options	Remove	
Complete Framers Supply Inc	USA	Moulding	2/11/2016	142	a.CF		Options	Remove	

f) Networking

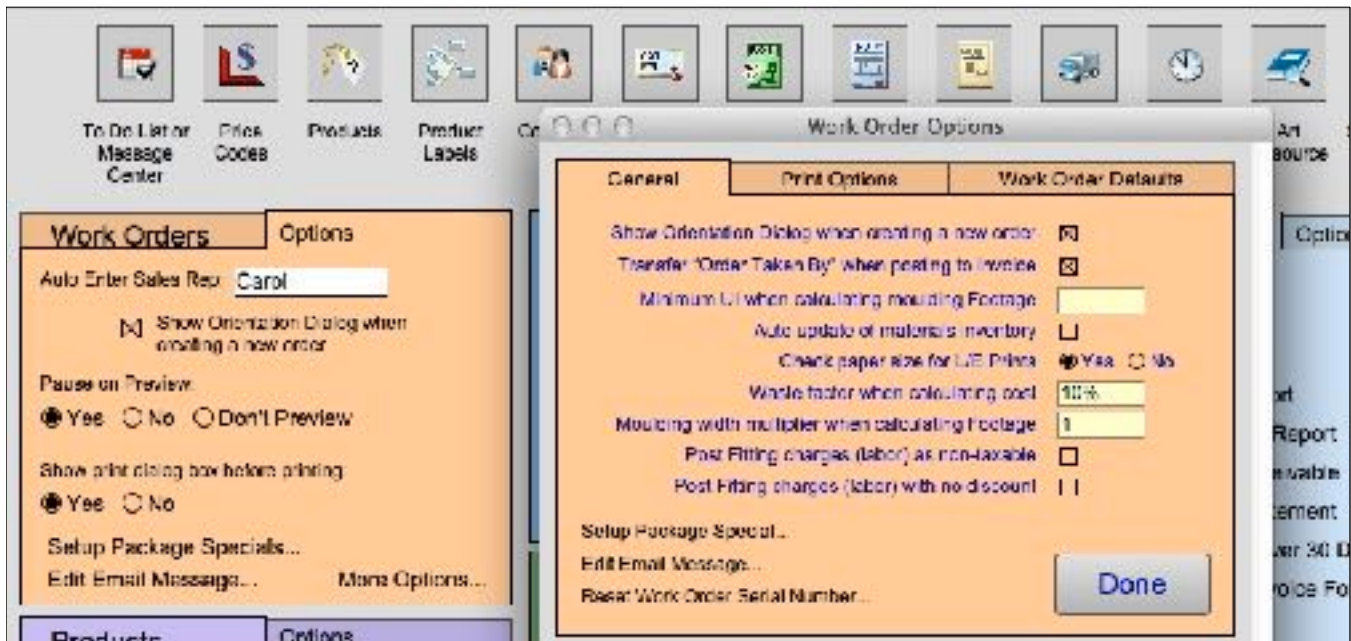
Main Menu > Set Up Data button > Network tab

Setting files to Single User if you are using FrameReady on one computer only. Otherwise, enter your Network Key and set to Multi User. [Setting up FrameReady for Multi User](#)

g) Defaults: Work Order Options

Main Menu > Options tab (salmon section, upper left)

Setting up defaults can speed up the time it takes to complete an order. It also allows you to customize your setting for how your shop operates. Eg. If you are the only person in the shop entering orders, put your name in the Sales Rep field. Otherwise, leave it blank. It must be filled before the sales person leaves the work order screen. The name on the order is also 'signed' at the bottom of the completion email which is used to notify a customer when their order is ready to be picked up.



More information is available on our FrameReady Knowledgebase. Click the links to learn more.

[Set Up Package Specials...](#)

These are used for Poster specials or any framing you perform with has a fixed price and is repeated.

[Edit Email Message...](#)

The completion email will let customers know that work is done and they can pick up their order. It is personal and efficient. They can pick up the message on their cell phone and stop on their way home.

Under More Options...

[General Tab](#)

[Print Options Tab](#)

[Work Order Defaults Tab](#)

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g) Defaults: Invoice Options

Main Menu > Options tab (pale blue section, upper right)

If you are the only person in the shop entering orders, put your name in the Sales Rep field. Otherwise, leave it blank. It must be filled before the sales person leaves the invoice screen.

If you are located in a country which does not use pennies (Australia or Canada), then click the box for Rounding. If you are in the USA, leave the Rounding box empty.

To learn more about the other set up options, click on the links to view information from the FrameReady Knowledgebase on our website.

[Set Up Invoice Options](#)



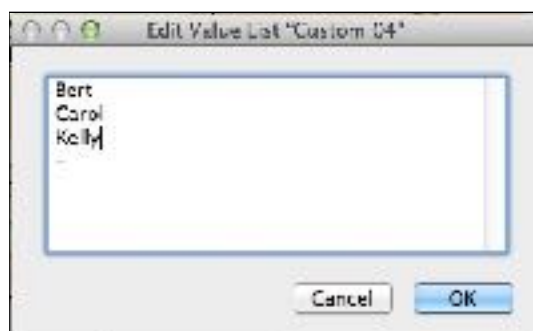
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B) WORK ORDER FILE

a) Sales Rep

Work Order > Order Taken by field

Add the name of all people who will enter work orders so that they can quickly select them from the list, the names will be consistent (for searching and reports) and if you use the completion email, the name of the person taking the order will appear at the bottom of the email message.



Keep your business personal. Do not use: “unknown”, “sales rep” or initials.

Use the “Edit...” at the bottom, to modify the contents of the list.

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b) Location

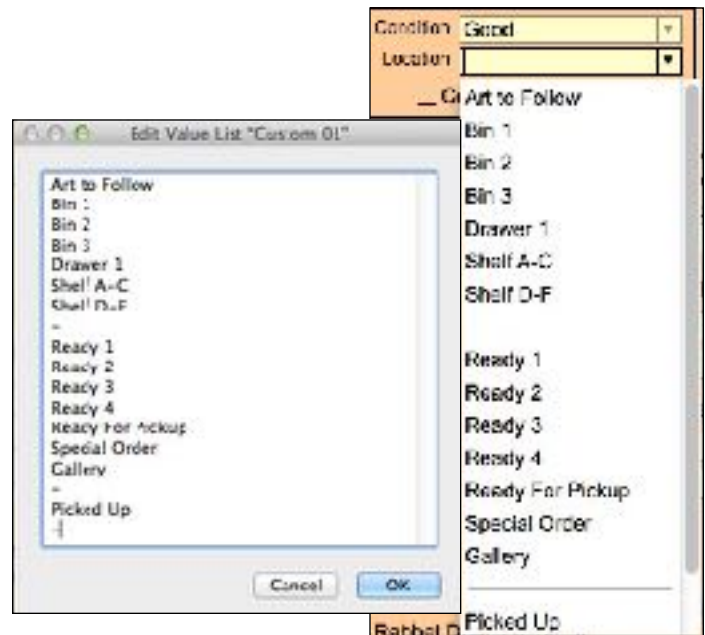
Work Order > Location field

Edit the location list of where art will be located as it travels through production from arrival to completion.

Use the Edit... at the bottom of the list to modify the contents.

You can create dividing lines by added a hyphen between items in the list.

The top of the list shows where art is stored before it is framed. In the middle, it shows where it has been placed when it is completed. At the bottom, use "Picked Up" to show that it is no longer in your business.



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c) Type of Artwork

Work Order > Artwork field

The Artwork selection list will help the framer to identify the correct artwork. The list will appear in the order in which you enter it. A report based on the words in this list will identify which art is framed most often and which provides the most profit.

Use the Edit... at the bottom of the list to modify the contents.

You can create dividing lines by added a hyphen between items in the list.



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C) CONTACTS FILE

a) Gallery Record

Contacts file > ID# field

The first record in the database is yours. Do not give it away or write over it. Your ID# is the word "Gallery". This provides you with special privileges not available to others. Use it for framing items for gallery display and sale; to create your own readymades; and convert art to framed art for sale.

Company	Imperial Frames			Account #		ID#	Gallery
First		Mid		Last		Prefix	

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b) All Contacts

Contacts file > Account # field

All people you contact should be entered into your Contacts file; not just your customers. Enter suppliers and employees as well. For Suppliers, be sure to enter your account number in the Account # field. This will print onto your order list and make them available in the Price Codes file for ordering materials. You can also mark employees and suppliers with Keywords.

Company	Larson-Juhl			Account #	112233	ID#	10003
First	Jim	Mid		Last	Smith	Prefix	

c) Keywords

Contact file> Keywords tab

Each new entry is automatically marked in the Keywords as "General".

Keywords	Terms	Shipping	Referrals	Date/Notes	Group																														
Add/Remove Keywords Show Details Rev																																			
<table border="0"> <tr> <td><input type="checkbox"/> Actors</td> <td><input checked="" type="checkbox"/> General</td> </tr> <tr> <td><input type="checkbox"/> Ad-Billboard</td> <td><input type="checkbox"/> Hosp Employee Discount</td> </tr> <tr> <td><input type="checkbox"/> Ad-Flyer</td> <td><input type="checkbox"/> Newsletter</td> </tr> <tr> <td><input type="checkbox"/> Ad-Newspaper</td> <td><input type="checkbox"/> Newsletter Delay</td> </tr> <tr> <td><input type="checkbox"/> Ad-Sign</td> <td><input type="checkbox"/> Newsletter Refused</td> </tr> <tr> <td><input type="checkbox"/> Ad-Yellow Pages</td> <td><input checked="" type="checkbox"/> Photographer</td> </tr> <tr> <td><input checked="" type="checkbox"/> Artist</td> <td><input type="checkbox"/> Preferred List</td> </tr> <tr> <td><input type="checkbox"/> Classes, Art</td> <td><input type="checkbox"/> Rotary Club</td> </tr> <tr> <td><input type="checkbox"/> Classes, Photo</td> <td><input type="checkbox"/> Supplier, Art</td> </tr> <tr> <td><input type="checkbox"/> Club member</td> <td><input type="checkbox"/> Supplier, Framing</td> </tr> <tr> <td><input type="checkbox"/> Designer</td> <td><input type="checkbox"/> Wholesale</td> </tr> <tr> <td><input type="checkbox"/> Do Not E-Mail</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Do Not Send Mail</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Embroiderer's Guild</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Employee</td> <td></td> </tr> </table>						<input type="checkbox"/> Actors	<input checked="" type="checkbox"/> General	<input type="checkbox"/> Ad-Billboard	<input type="checkbox"/> Hosp Employee Discount	<input type="checkbox"/> Ad-Flyer	<input type="checkbox"/> Newsletter	<input type="checkbox"/> Ad-Newspaper	<input type="checkbox"/> Newsletter Delay	<input type="checkbox"/> Ad-Sign	<input type="checkbox"/> Newsletter Refused	<input type="checkbox"/> Ad-Yellow Pages	<input checked="" type="checkbox"/> Photographer	<input checked="" type="checkbox"/> Artist	<input type="checkbox"/> Preferred List	<input type="checkbox"/> Classes, Art	<input type="checkbox"/> Rotary Club	<input type="checkbox"/> Classes, Photo	<input type="checkbox"/> Supplier, Art	<input type="checkbox"/> Club member	<input type="checkbox"/> Supplier, Framing	<input type="checkbox"/> Designer	<input type="checkbox"/> Wholesale	<input type="checkbox"/> Do Not E-Mail		<input type="checkbox"/> Do Not Send Mail		<input type="checkbox"/> Embroiderer's Guild		<input type="checkbox"/> Employee	
<input type="checkbox"/> Actors	<input checked="" type="checkbox"/> General																																		
<input type="checkbox"/> Ad-Billboard	<input type="checkbox"/> Hosp Employee Discount																																		
<input type="checkbox"/> Ad-Flyer	<input type="checkbox"/> Newsletter																																		
<input type="checkbox"/> Ad-Newspaper	<input type="checkbox"/> Newsletter Delay																																		
<input type="checkbox"/> Ad-Sign	<input type="checkbox"/> Newsletter Refused																																		
<input type="checkbox"/> Ad-Yellow Pages	<input checked="" type="checkbox"/> Photographer																																		
<input checked="" type="checkbox"/> Artist	<input type="checkbox"/> Preferred List																																		
<input type="checkbox"/> Classes, Art	<input type="checkbox"/> Rotary Club																																		
<input type="checkbox"/> Classes, Photo	<input type="checkbox"/> Supplier, Art																																		
<input type="checkbox"/> Club member	<input type="checkbox"/> Supplier, Framing																																		
<input type="checkbox"/> Designer	<input type="checkbox"/> Wholesale																																		
<input type="checkbox"/> Do Not E-Mail																																			
<input type="checkbox"/> Do Not Send Mail																																			
<input type="checkbox"/> Embroiderer's Guild																																			
<input type="checkbox"/> Employee																																			

You can add other Keywords for searching or sorting your contacts. They keyword are sorted alphabetically. Your program comes with a few keywords already entered.

Use the Add/Remove Keywords button to customize your list.

You can mark as many keywords for a contact as you wish. With new privacy laws, you may want to create one for "Opt-in Newsletter", "Opt-in Email", etc.

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D) PRICE CODES FILE

a) Matboard

Price Codes file > Matboard button (on left side or at top)

The default pricing in FrameReady is set up with a sliding scale markup. The lower the cost of the mat; the higher the markup is. The markup starts at 4 and goes down to 3. You can change any of the markups by clicking in the large window and typing.

The set price is the cost of the board divided by 2. So, the customer pays for half of the wholesale cost of the board no matter what size they purchase. You can change the set price to cover the full board by entering just Cost into the field. Or delete it, or enter any amount.

Click [HERE](#) to learn more about the FrameReady default pricing formula for matboard.

You do not have to change the pricing formula individually on each matboard record. Instead, you can create a default formula which will be applied to all matboard in your program. Use the Pricing Options

and Defaults button to see the defaults which came with your program.
Learn more about the [Pricing Options and Defaults screen](#).

Call 888-281-3303 to book a free over-the-phone consultation to help you set up your pricing.

Markup	Set Price
Case(Round(Cost/2,1)
Cost<6; 4;	
Cost<8; 3.95;	
Cost<10; 3.9;	
Cost<12; 3.85;	
Cost<14; 3.8;	
Cost<16; 3.75;	
Cost<18; 3.7;	
Cost<20; 3.65;	
Cost<22; 3.6;	
Cost<24; 3.55;	
Cost<26; 3.5;	

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b) Moulding

Price Codes file > Moulding button (on left side or at top)

Moulding can be priced by Length (Cost), Chop or Join. The FrameReady default pricing formula has all three of these built into one formula. The Length and Chop markups use a sliding scale while the Join formula is a straight markup for all prices. Eg. Join x 2.

You can identify how you order your moulding by clicking on the Length, Chop or Join circle below the formula tab.

You can set the order type for all moulding or just one supplier by using the Apply Order Type to Group button (under the pink Auto Inv tab).

Click [HERE](#) to learn more about the FrameReady default pricing formula for moulding.

You do not have to change the pricing formula individually on each moulding record. Instead, you can create a default formula which will be applied to all moulding in your program or one supplier. Use the Pricing Options and Defaults button to see the defaults which came with your program.

Learn more about the [Pricing Options and Defaults screen](#).

Formula Set Price Minimum & Surcharges Special

Markup = 5

Let(

Length Price =

Case(

Cost<2.50; Cost * 5;

Cost<3.75; Cost * 4.9;

Cost<5.00; Cost * 4.8;

Cost<6.25; Cost * 4.7;

Cost<7.50; Cost * 4.6;

Cost<8.75; Cost * 4.5;

Cost<10.00; Cost * 4.4;

Cost<11.25; Cost * 4.3;

Cost<12.50; Cost * 4.2;

Cost<13.75; Cost * 4.1;

Cost<15.00; Cost * 4;

Cost<16.25; Cost * 3.9;

Cost<17.50; Cost * 3.8;

☒ Length ☐ Chop ☐ Join Enlarge


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c) Glass

Price Codes file > Glass button (on left side or at top of screen in List View)

The default pricing for glass is to price by lite size. Code tables are created for each glass type using dimension of X and Y. Prices can be adjusted manually or by percentage. Each glass type will have its own Code Table. Eg. Conservation Clear glass uses code table GL03. Each code table is assigned to a glass record under the Code tab.

You can also price with a formula of cost x markup to price by United Inch Area or Square Inch. Click [HERE](#) to learn more about glass pricing options.

Code Table					
GL03					
X	Y	United IN	Square IN	Price	
8	10	18	80	9.80	X
9	12	21	108	11.60	X
11	14	25	154	16.00	X
14	18	32	252	20.90	X
16	20	36	320	22.20	X
18	24	42	432	27.60	X
20	24	44	480	29.00	X
22	28	50	616	34.50	X

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