

Write a Work Order

- Click **New Work Order** from the Main Menu Screen and select the Orientation of the art. *If square, select none.*
- Measure piece and enter the **Width** and **Height** of the art. *Note: use the grey up or down arrows to change by 1/8 of an inch. Hold Ctrl key to increase or decrease by 1/16 of an inch.*
- Enter all four **Mat Margins** by clicking on the grey box. Click in the field to change individual amounts. If necessary, enter the **White Space** for a limited edition print. *This is the amount of white paper to appear around the limited edition print (or space around a double-matted float mount).*
- Enter the **moulding number** in the Frame1 field. (Eg. 379025.LJ) and press the Enter or Tab key. *If you are entering stacked frames, click on the stacked frame icon. Note: Frame1 is closest to the art.*
- Enter the **Matboard number** in the field to the right of **Mats**. (Eg. B8801) *Enter mats in order, top to bottom. If entering more than one mat, select the reveal from the grey box to the right of the description. If more than 3 mats are needed, click on Mats to enter up to 7 matboards.* If placing a fillet in the mat, click in the Fillet field and in the Fillets screen, enter the fillet in the correct mat.
- Select from the pop-up lists for **Mat Design, Mount/Stretch, Hardware, Extra, Fitting, Glazing/Fabric** or **Other**. *To select more than one item for a group, click on the underlined group name (Eg. Fitting)*
- To enter any **Notes** about the framing, click on the Notes tab in the lower right area (near measurements).
- Click on **Artwork** and select type of art from pop-up list.
- Type in title of art or **Description** in field to right of Artwork box. *Note: if you are pulling art from inventory, click on the magnifying glass and enter the product number, title or description of the art, or the artist's name to locate the piece and enter it onto the work order for framing.*
- Select **Condition** of art from pull down menu.
- Enter **Location** where artwork will be store for framer.
- Enter other **artwork** information if necessary: **Artist**, Limited Edition Number (**L.E. #**), **Value of Art**.
- Enter a customer by clicking on the **Name, Company** or **Phone** button. *FrameReady will search for the customer to see if they have already been entered. If they have not been entered, you will be asked to create a new record for them. Note in the top left area refers to the customer Eg. VIP, no checks,etc.*
- Enter your name in the **Order Taken By** field and verify the **Due Date** (beside the word normal).
- Click the **Estimate** button, if the customer is not going with this order. Click **Another Order for this Customer** (top right), if they have other orders. If the customer wishes to proceed with their order, click **Print This Customer's Work Orders** button (left side) to print all of their orders or the printer icon at the top of the screen to print only the current order.

The screenshot shows the FrameReady software interface for creating a work order. The main window is titled 'New Work Order' and contains several sections:

- Customer Information:** Name: Jim Taylor, Address: PO Box 3875, Madison WI 53708. Contact info: (703) 416-5234 Home, (801) 801-8011 Cell, (703) 416-6677 Work. Email: jtaylor@aol.com.
- Order Details:** Order Shop: WOF A0375, Date: Fri Aug 10/12, Order Taken By: Carol, Designed By: Carol.
- Artwork Information:** Title: Trees in the wind, Condition: Good, Location: [blank]. Value of Art: [blank].
- Mat Boarding Section:**
 - Mat 1: 40440069.RM, ar-raven, 1 1/2 raven grey, Price: 126.55
 - Mat 2: B8801, featherstone alp ac, Price: 26.95
 - Mat Design: Foamboard, Acid-free, Price: 12.22
 - Hardware: Wine Hanger, Price: 1.82
 - Extra: Wood, Price: 16.00
 - Glazing/Fabric: Conservation Clear, Price: 20.51
- Measurements:** Width: 14, Height: 18, Mat Margins: L: 3, R: 3, T: 3, B: 3, White Space: L: [blank], R: [blank], T: [blank], B: [blank].
- Price Summary:** Unit Price: 204.05, Amount: 204.05, Tax1: 30.61, Tax2: [blank], Total: 234.66.

Creating an Estimate

Enter the work order as you normally would and click the **Estimate** button in the Order tab.

Changing an Estimate to an Order

Click on the green **Activate** button in the Order tab after filling in the work order.

Locking the Price on an Order

Click the **Lock** in the top right corner.

You can change the unit price to any amount or simply click OK to lock in the current amount.

Any items added or removed will not change the price once it is locked.

Lock & unlock the price as often as needed.

Unlocking a Price

Click the closed **Lock** in top right corner and the price will automatically revert to the correct sum of the components.

Leave the Work Order screen

You can leave the work order screen at any time, however, you must enter your name in the **Order Taken By** field.

You may be asked questions if you have unfinished information Eg. mat margins but no mats. Just confirm you want to leave without making the entry.

Fit to a Readymade Frame

1. Enter width and height dimensions.
 2. Click on the **Fit in Readymade** button (left side)
 3. Enter inside frame size.
 4. Click **Center Window** or **Make Top & Sides Same** button.
 5. Click **Done**.
-

Frame Mirror to Outside Dimensions

1. Enter Frame (do not enter width and height)
2. Click on **Fit to Outside Dimension** button.
3. Enter overall size of frame.
4. Click OK.

*If you enter a different moulding, click the **Fit to Outside Dimensions** button again to refit the frame to the same dimensions.*

Hold down the shift key when clicking the button if you want to change the overall size.

Stacking Frames

1. Click on the **stacked frames** icon to go to the screen where you can enter up to 5 stacked frames. Frame1 is closest to the art.
 2. Click on the **field** beside the magnifying glass to enter the frame number.
 3. Click the **Insert** button to move a frame outward in the design and enter a fillet, liner or additional frame.
 4. Click Done to return to the Work Order.
-

Entering a Stretcher or Strainer

1. Enter the stretcher **moulding number** into the Frame1 field of the Layered Frames screen.
2. Click the **Modify** button and change the **group** from "Wood" to "Extender".

The group "Extender" will build the frame downward while "wood", "liner", "fillet", etc. will build it outward.

3. Enter the rest of the frames into the Frame2 to Frame5 fields (as needed for your design).
 4. Click Done to return to the Work Order.
-

Enter a one time Discount

1. Click on the **Options** tab (top right corner).
 2. Click in either the \$ field or the % field to enter a discount.
 3. Enter the discount to be given. Percentage discounts must be entered as a decimal. *Dollar discounts will not appear as "Savings" on the Detailed Summary or the Invoice.*
-

Tax Exemptions & Discounts

Tax exemptions are entered in the **Contacts file** on the customer's record under the **Terms/Shipping** tab. If you enter the customer on the work order before entering their exemption in the Contacts file, you will need to clear their name from the order and enter it again to show the new information you have just added. Changes are not retro-active. This same rule applies to Customer's who always receive the same Discount. Enter it under the Terms/Shipping tab.