PHASE ONE

Portrait One Manager

Powered by

Studio **Plus**

User Guide
Draft

Portrait One Manager User Guide Table of Contents

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Introduction

Portrait One Manager is the Answer

Thank you for purchasing Portrait One Manager. You'll find it's a user-friendly, powerful tool designed to increase efficiency and profitability for today's studios.

Running a photography studio demands creativity, artistry and the flair for the dramatic.

Running a SUCCESSFUL photography studio requires sophisticated business skills and management savvy.

Portrait One Manager supplies the management tools; you supply the creativity.

Portrait One Manager is the answer to the difficult issues that you face during day-to-day studio management. Portrait One Manager is the way to resolve inefficiencies in scheduling and production for you and your employees. Portrait One Manager is the key to providing extraordinary customer service and to increasing cash flow by upgrading the invoicing process. Portrait One Manager helps you to know your customer and shows you how to enhance profitability based on your customer's potential photography needs. You'll soon discover that Portrait One Manager is the answer to maximizing your time and getting the most out of your studio and your employees.

Even though Portrait One Manager is very user-friendly and easy to use, you'll need to ease into the operation of new software. A separate manual, the "Portrait One Manager Getting Started Guide," is available to help you become familiar with the basics and allows you to immediately begin receiving the benefits of the program. This User Guide is designed to give you the in depth information that you may need to master your new software. As with most software, you'll find several ways of accomplishing certain tasks. To avoid confusion, we'll keep it simple. Use the way that works best for you.

Words to the Wise

Throughout this manual, you'll see boxes that contain the following graphics:

Here's a Flash for You!

"Here's a Flash for You!" provides helpful hints, definitions and tips.

Bugged About Something??

"Bugged About Something?" voices questions that may be in your mind.

ATTENTION!

"Attention" boxes contain an important fact or warning.

Pathways to Success

"Pathways to Success" boxes offer tips on how to reach the full potential of Portrait One Manager to expand your business and build your reputation as a studio that exceeds customer expectations, along with maximizing both studio and employee efficiency.

Let's get started!

Installing Portrait One Manager

Choosing Single User or Multi-User Installation

If you're installing an evaluation copy of Portrait One Manager, you have the option of installing it in a single user or multi-user environment. If you're installing a licensed (purchased) copy of Portrait One Manager, your type of installation is limited to the type of license you've purchased.

Installation

Okay, let's get started! Before you can use Portrait One Manager, the installation program must copy some files onto each workstation you plan to use Portrait One Manager. To do this, follow these instructions:

Step 1: Read all installation instructions

Please read this entire chapter FIRST! Having a basic understanding of the Portrait One Manager Installation Program before beginning installation can save time.

Step 2: Check Portrait One Manager System Requirements

Make sure that the system on which you're installing this program meets all of the minimum system requirements to properly run your Portrait One Manager program:

	Windows 98	*Windows 2000/NT/XP/ME*
Processor	Pentium II	Pentium III
Minimum RAM	64 Meg	128 Meg
Recommended RAM	128	256
Hard Disk Space for Program Files	50 Meg	50 Meg
Hard Disk Space for Data Files	2 – 20 Meg	2 – 20 Meg
Monitor Resolution	800 X 600 or Better	800 X 600 or Better

Step 3: Remove existing Portrait One Manager installation from your hard disk (if any)

If you have a previous version of Portrait One Manager on your hard drive, follow the steps below to remove it:

1. From the Start button choose Settings, Control Panel.

2. Open Add/Remove Programs.

3. Highlight Portrait One Manager and click on the Add/Remove button.

4. If you're asked whether you want to remove shared components, answer "yes".

5. If you get a message that says a certain file was not found, continue anyway.

Step 4: Install Portrait One Manager to your hard disk

First, we recommend that you close all applications prior to beginning the installation process.

1. Insert the Portrait One Manager installation CD into your CD-ROM drive. The installation program will launch.

2. If the installation program does not launch, double-click on the "My Computer" icon on your computer's desktop. Double-click on the CD drive icon. Double-click on SETUP.EXE.

3. During installation, follow the online prompts of the Setup Wizard. It's our recommendation—unless you're an experienced computer user—that you accept the defaults provided.

Bugged About Something??

What type of installation should I choose?
If you will be using Portrait One Manager on just one PC, you should choose the 'Single User Installation'. If you want to share Portrait One Manager over a network of PC's, you'll need to select the 'Multi-User' option, but which one? Select the 'New Multi-User' option for the first PC on which you're installing Portrait One Manager, and then select 'Existing Multi-User' for each additional PC.

4. When prompted for the Company Name, type in your studio name.

ATTENTION!

The Company Name **CANNOT** be changed, so make sure you spell and punctuate your studio name correctly, as this is how it will appear on your invoices, etc.

5. You'll next be prompted to provide the user's full name and initials, along with a password. We recommend that you leave the password blank at this time. Don't worry--it can be filled in later if required for security purposes.

ATTENTION!

Make a note of the name and initials that you've just filled in—you'll need the information each time you log into the Portrait One Manager program. Passwords are case sensitive; the User ID information is not.

6. The final screen asks whether you want to launch the Internet Update Utility. This utility will automatically search our website for the latest version of Portrait One Manager to install. If you have an Internet connection on this computer, you can launch the Update Utility (see next section for more information on updates.) Otherwise, just click Finish to complete your installation.

Optimizing Portrait One Manager

Now that you've completed the installation process, it's time to optimize your installation to ensure optimal performance and stability of the software. If you need help following these steps, please call your technical support specialist.

1. **Install Latest Portrait One Manager Service Release.** You have two options to install this update. The first is to launch the Portrait One Manager Internet Upgrade Utility and click the Begin Update button. This program will use your Internet connection to find the latest update for Portrait One Manager, download it, and install it. The second option is to manually connect to www.phaseone.com, click the Downloads button, and then click the latest service release update to download. When you download this update, save it to a subfolder called SPUpdates inside your Portrait One Manager data folder. The next time you run Portrait One Manager on each workstation, the update will be installed.

Here's a Flash for You!

Portrait One Manager Software is committed to continually improving its software. We encourage you to regularly put "Revisit www.phaseone.com" on your To-Do list to ensure you have the latest update of Portrait One Manager installed.

2. **Install Latest Microsoft Jet Service Release.** Because Portrait One Manager depends on certain Microsoft files, it is important to make sure that you have the most current Jet Service Release installed on each workstation. Microsoft has released a separate update for each operating system. You need to determine which update you should download for each of your workstations. Click on the following update(s) to download to your computer. Once downloaded, simply double-click to install.

Windows 98/NT	ftp:// ftp.phaseone.dk/portrait/Win/Portrait%20One%20Manager/Util/Jet40SP6_9xNT.exe
Windows 2000	ftp:// ftp.phaseone.dk/portrait/Win/Portrait%20One%20Manager/Util/Jet40SP6_W2K.exe
Windows XP	ftp:// ftp.phaseone.dk/portrait/Win/Portrait%20One%20Manager/Util/Jet40SP6_WXP.exe
Windows ME	ftp:// ftp.phaseone.dk/portrait/Win/Portrait%20One%20Manager/Util//Jet40SP6_WMe.exe

3. **Optimize Your Server.** If you are running a Windows 2000 or NT Server to store your data files, it is critical that you disable Op Locks to ensure the integrity of your data files. Don't worry, you don't need to know what an Op

Lock is. We'll make it simple for you. Simply click on the following link to download a small file to your server. Once downloaded, double-click on it to install.

Windows NT	ftp:// ftp.phaseone.dk/portrait/Win/Portrait%20One%20Manager/Util//DisableOpLocksNT.reg
Windows 2000	ftp:// ftp.phaseone.dk/portrait/Win/Portrait%20One%20Manager/Util/DisableOpLocks2K.reg

ATTENTION!

If you are running a Windows 2000 or NT Server to store your data files, it is critical that you disable Op Locks to ensure the integrity of your data files.

Congratulations! Pat yourself on the back. You've completed the installation and setup. You are now ready to run Portrait One Manager.

Bugged About Something??

But what do I do next?

We're getting to that—don't rush us. Okay, you've completed installation and setup. Now you're ready to launch Portrait One Manager and log in. When launching, you have the option of either viewing Portrait One Manager with sample data already entered in or starting to key in information about your own studio.

Launching Portrait One Manager and Logging In

1. From the Start Menu, choose Programs, click the Portrait One Manager group and then choose 'Portrait One Manager with Sample Data' to view sample data files or choose 'Start Portrait One Manager' to start entering your own data.

2. Type in your user I.D. *(See, we told you you'd need that information again!)* and your password, if applicable.

3. Press **ENTER** or click the **OK** button.

Welcome to Portrait One Manager!

Working with Browse Screens

Navigating the Browse Screens

Portrait One Manager features browse screens for the Calendar, Clients, Sessions, Invoices, Phone Calls, Production and Images. Each view has a corresponding function key (see view menu), but you may also change views by clicking the down arrow next to the browse screen name, shown in bold at the upper left. Click the arrow and drag down to the desired view. Then release your mouse button.

Here's a Flash for You!

Browse screens provide a quick list of your data, and also allow you to quickly view records shown on the screen. Double clicking on any entry in the browse screen will bring up the associated record.

The Calendar Browse Screen

When you start Portrait One Manager, the program opens up to the **Calendar Browse** screen shown below.

The Calendar Browse Screen - Studio Plus always opens up to this screen.

As you see, the calendar defaults to the current user and today's date. The Mini calendars on the upper right can assist you in selecting the days you wish to view. You can also choose your viewing by Users and Inside Locations. See the section "Working with Calendar" for more detailed information.

The Other Browse Screens

The records displayed on other browse screens can be sorted by any of the fields shown. Just click on the column heading and the records will sort by that column. Click again and the records are sorted in reverse order.

You may also select which records display on a browse screen, or search for a record on a browse screen. All browse screens except the calendar have a search box in the upper right corner. Click the down arrow next to the search window box and drag down to the type of criteria you want to use to display or search. Then, type the specific criteria in the search box and press Enter, or select the criteria from the drop down menu and press Enter.

Take a look at the example below:

Working with the Calendar

Features of the Calendar Browse Screen

The Calendar Browse Screen is the best way to view the schedules for all users and locations. A location can be any facility, studio, room, or area for which you want to track a schedule. The schedules for multiple users and locations can be viewed simultaneously in an easy-to-read graphical layout, making it easy to compare schedules or look for availability. Double clicking on any available time slot launches the easy to use schedule wizard, which will automatically create a session or appointment for a new or existing client along with the invoice and receipt of payment, if necessary. Double clicking on any existing session or appointment will launch the appropriate information screen with further details.

The Calendar Browse Screen

Get familiar with the Calendar Browse screen shown above, which is the default screen for Portrait One Manager. You can click on the Calendar icon at the top of the page for a drop down menu, which we call the Browse Menu. The Browse Menu is used to switch between Browse Screens. As you see, the calendar defaults to the current user and today's date. The Mini calendars on the upper right side assist you in selecting the days you wish to view. You can also choose your viewing by Users and Inside Locations.

Pathways to Success

Ta Da! Introducing (drum roll) To-Do!
To-Do, an exciting feature of Portrait One Manager that takes the burden of remembering stuff off your shoulders! Keep track of phone calls to return and supplies to order. Remember your wedding anniversary and the time of your son's baseball game on Thursday. Consolidate all those scribbled reminders on scraps of paper and Post-it notes onto the To-Do feature of the Portrait One Manager Calendar. To-Do tracks all those tasks, phone calls and essentials that are key to the success of any business and to day-to-day living. Discover the satisfaction of checking off your accomplishments and knowing you've got a handle on all those nagging, important details.

More To-Do! This feature is so easy to use–click on the appropriate space to enter a new To-Do or double-click to record more detailed information regarding the to-do. Tasks continue to roll forward on the calendar until you click the box indicating that the task has been completed. Overdue tasks appear in red. A personal To-Do can only be viewed by the person to whom the To-Do is assigned.

Here's a Flash for You!

Here are some handy tips to help you modify your schedule:
♦ To enter special Date Headers, such as "Christmas" or "Bunny Promotion", click the date header at the top of the calendar. Enter description, special open hours, etc.
♦ Resize appointment or session blocks to change the start or end time.
♦ Drag-n-Drop appointment or session blocks to move appointment or session to a new time/date.
♦ Right-click an appointment, click Copy, then right-click on empty time slot(s) and select Paste. (This is great for repeating appointments, such as Monday Golf.)
♦ To enter a quick unlinked appointment, simply click once on the desired time slot and start entering.
♦ To delete an appointment/session, double-click on it, then press Delete.
♦ To view today's date, press Ctrl-T (for "Today").

Navigating the Calendar—Some Handy Tricks for Schedule Viewing!

1. To view multiple users, hold the Control key and click on the desired users.

2. To view a range of users, click on the first user, then hold the Shift key and click the last user in the desired range.

3. To de-select any user, hold the Control key and click on that user.

4. To view multiple locations, hold the Control key and click the desired locations.

5. To view a range of locations, click on the first location, then hold the Shift key and click the last location in the desired range.

6. To de-select any current location, hold the Control key and click that location.

7. To view multiple dates, hold the Control key and click the desired dates.

8. To view a range of dates, click on the first date, then hold the Shift key and click the last date in desired range.

9. To view all of a specific day of the week for a given month, click on the first letter of the day (located at the top of each mini calendar) that you wish to view.

> **Example:** To view every Wednesday in February, click on the W in the month of February. To view every Wednesday in all mini calendars displayed, hold the shift key and click on the W above the top mini calendar.

10. To view other combinations and ranges of combinations, hold the Shift or Control key and click on desired dates, users, and/or locations.

> **Example:** To view every Wednesday in February for David Doe, select David's name and click on the first Wednesday, then hold the control key and click on the remaining Wednesdays. This will display the schedules for all of David's Wednesdays in that month. Or, click the "W" above the mini calendar to highlight all of the Wednesdays in that month.

11. To view the previous month or next month's calendar, click on the appropriate arrow button above the top mini calendar.

12. To quickly scroll through the months, click on the name of the month above the top mini calendar and hold the mouse button down. Move your cursor up to scroll backwards and down to scroll forwards. The farther away from the center month that you move the cursor, the faster you'll scroll. This action is especially useful in scrolling to previous or future years.

Creating a New Linked Appointment for an Existing Client

1. To find the time and date, refer to the topic "Navigating the Calendar."

2. When you have located the desired time and date, double-click on it. A scheduling wizard will pop up to walk you through the scheduling steps.

3. From the Schedule Wizard choose "Create an appointment for a specific client." Click Next.

4. The default option is already set to "Search for an existing client." Click Next.

5. To find the desired client, choose the search criteria from the drop down box and tab to the criteria field. Enter the corresponding information (I.e. search criteria; last name, criteria field; Johnson.) Then press Enter.

6. All of the clients that match the criteria that you have chosen will then be displayed.

7. If the client is not visible, you can find it by using the scroll bar or you can choose another criteria to search by and type in the appropriate information. When you find the correct client, click in the gray box to the left of the client to select it. Click Next.

8. Type in the appointment description. Press Tab.

9. Choose an Appointment Type from the drop down list or type one in. Press Tab.

10. Choose an Appointment Location from the drop down list or type one in. Press Tab.

11. Choose an Appointment End Time from the drop down list or type it in. Click Next.

12. Enter necessary notes about the appointment. Click Next.

13. If you wish to view or modify the appointment, click the check box labeled "Open Appointment for Additional Modifications" and click Finish, or just click Finish if viewing and/or revisions are unnecessary.

Creating a New Linked Appointment for a New Client

 Here's a Flash for You!

A Linked Appointment is tied to a specific client because it involves that client. For appointments that don't involve a specific client, choose an Unlinked Appointment.

1. To find the time and date, refer to the topic "Navigating the Calendar".

2. Double-click in the desired time slot.

3. A scheduling wizard will pop up to walk you through the scheduling steps.

4. From Schedule Wizard choose "Create an Appointment for a New Client."

5. Enter the client information. Continue to click Next until prompted for appointment information.

6. Enter the Appointment Description. Press Tab.

7. Choose an Appointment Type from the drop down list or type one in. Press Tab.

 Here's a Flash for You!

The Appointment type determines what will be displayed on the calendar to describe that appointment.

8. Choose an Appointment End Time from the drop down list or type one in. Press Tab.

9. Enter necessary notes about the Appointment. Click Next.

10. If you want to view or modify the Appointment, click the check box labeled "Open Appointment for Additional Modifications" and click Finish or just click Finish if viewing and/or revisions are unnecessary.

Creating a New Unlinked Appointment (No Client)

1. To find the time and date, refer to the topic "Features of the Calendar ".

2. Double-click in the desired time slot.

3. A scheduling wizard will pop up to walk you through the scheduling steps.

4. From Schedule Wizard, choose "Create an Unlinked (no client) Appointment." Click Next.

5. Type in the Appointment Description. Press Tab.

6. Choose an Appointment Type from the drop down list or type one in. Press Tab.

Here's a Flash for You!

The Appointment type determines what will be displayed on the calendar to describe that appointment.

7. Choose an Appointment End Time from the drop down list or type one in. Press Tab.

8. Enter necessary notes about the appointment. Click Next.

9. If you want to view or modify the appointment, click the check box labeled, "Open Appointment for Additional Modifications" and click Finish, or just click Finish if viewing and/or revisions are unnecessary.

Creating a Session for an Existing Client

1. To find the time and date, refer to the topic "Features of the Calendar."

2. When you have located the desired time and date, double-click on it. A scheduling wizard will pop up to walk you through the scheduling steps.

3. The default option is already set to "Create a session for a specific client." Click Next.

4. The default option is already set to "Search for an existing client." Click Next.

5. To find the desired client, choose the search criteria from the drop down box and tab to the criteria field. Enter the corresponding information. (I.e. search criteria; last name, criteria field; Johnson.) Press Enter.

6. All of the clients that match the criteria that you have chosen will then be displayed.

7. If the client is not visible, you can find it by using the scroll bar or you can choose another criteria to search by and type in the appropriate information. When you find the correct client, click in the gray box to the left of the client to select that client. Click Next.

8. Continue to click Next as you verify the existing client information.

9. Enter Session Information as needed. Click Next.

10. Click on "Don't create an invoice now" and click Next.

 Here's a Flash for You!

If you want to create an invoice for this session, skip steps 10-12, and follow the steps outlined in "Working with Invoices."

11. If you want to modify or view either the session or client information, select them.

12. If you don't want to print the session confirmation, you must click in the Print Session Confirmation check box to de-select it. Click Finish.

Creating a Session for a New Client

1. To find the time and date, refer to the topic "Features of the Calendar."

2. When you have located the desired time and date, double-click on it. A scheduling wizard will pop up to walk you through the scheduling steps.

3. The default option is already set to "Create a Session for a specific client." Click Next.

4. Click in "Create a new client" radio button. Click Next.

5. Fill in the client's information and continue clicking Next.

Here's a Flash for You!

See the topic "Features of the Client Information Screen" for more details regarding other client features.

6. Enter session information as needed. Click Next.

Here's another Flash for You!

See the topic "Features of the Sessions Information Screen" for more details regarding sessions.

7. Click on "Don't Create an Invoice Now" and click Next.

Here's yet another Flash!

If you want to create an invoice for this appointment, skip steps 7 and 8, and follow the steps outlined in the topic, "Working with Invoices".

8. Click Finish to open the session and client screens for modification, or de-select either or both. Click Finish.

Working With Clients

Let's Talk Clients, Shall We?

A client record contains all the standard information regarding a customer, such as his/her address, phone number, client number, etc., but also the client's e-mail address, family members and booking preferences. A client can either be a current customer, a former customer or a prospect. By utilizing the client groups classifications, you can easily change the type of client. Using marketing plans to track your clients' interests will allow you to target your marketing and increase sales. If you need to know something about your client, pull up the Client Information screen.

Pathways to Success

Remember, the more client information you fill in such as birthdays, anniversaries, etc., the more data is available for your marketing and client base analysis. Don't forget to ask your new clients where they heard about you so you can complete the "Lead Source" section.

Features of the Client Information Screen

Now it's time to break down the Client Information Screen. This screen is used to store all pertinent client information and to display other related information for this client from other screens. Some of the client information stored here includes phone numbers, address, family members, client groups this client belongs to, and marketing plans in which this client is participating. All phone calls, appointments, sessions, invoices, and payments related to this client are also listed on one of the detail tabs. New phone calls, appointments, or sessions can also be created for this client from this screen by clicking on the appropriate button on the tool bar.

The client screen is divided into four different sections.

The Client Information Screen

1. **Menu Bar Section.** The Three menu choices are File, Edit and New.

   - **File Menu.** From the File menu you can save, delete and print the client records as well as exit the client screen.

1. **Save.** To save the client record.
   - You can just save the record by choosing Save
   -Or-
   - You can save the record and close the client screen by clicking Save and Close
   -Or-
   - You can save the record and get a blank screen to add another client record by clicking Save and New.

2. **Delete.** To delete a client record, bring up the record you want deleted and then choose the Delete option from the File menu.

3. **Acquire/Preview Client Image.** Use these features to acquire or to preview an image of this client. See the Working with Digital Imaging section and the Pictorial Directory in the Reports section for more information.

4. **Print Mailing Label.** Use this feature to print a mailing label showing the client's name and address for this client.

Here's a Flash for You!

If you want more options printing a single label, see the Company Preferences, Reports tab, and set the Single Mailing Label to Prompt for Printer.

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5. **Print Account Label.** Use this feature to print an account label showing the client's name, address, phone number, and client number for this client.

6. **Print Form Letter.** Use this feature to print a custom form letter or contract specific for this client.

- **Edit Menu.** From the Edit menu you can Cut, Copy and Paste selected text to and from the clipboard.

  1. **Cut.** You can cut text by highlighting the text you want to cut and then choosing Cut from the Edit menu.

  2. **Copy.** You can copy text by highlighting the text you want to copy and choosing Copy from the Edit menu.

  3. **Paste.** You can paste previously cut or copied text from a large variety of applications by first cutting or copying the text and then placing your cursor in the desired location in the Client record and choosing Paste from the Edit menu.

- **New Menu.** From the New menu, you can add a New Appointment, a New Call or a New Session.

  1. **New Completed Call.** To record a new call that has already been completed, choose New Completed Call from the New menu.

2. **New Future Call.** To add a new call to be completed in the future, choose New Future Call from the New menu.

3. **New Appointment.** To add a new linked appointment for this client, choose New Appointment from the New menu.

4. **New Session.** To add a new session, choose New Session from the New menu.

5. **New Invoice.** To add a new invoice, choose New Invoice from the New menu.

6. **New Email.** To send a new email to this client, choose New Email from the New menu.

2. **Toolbar Section.** Many of the same features available through the drop-down menus are also available here on the toolbar. If you're not sure what a certain button is for, hold your mouse over the button and wait for a tool tip to be displayed.

3. **Header Section.** The main client information is visible here, including client name, phone numbers and a flashing Call Warning (see below for more details on Call Warnings.)

4. **Detail Section.** Detailed information about the client can be found here. Each tab holds its corresponding information about the client.

- **General Tab.** From the General tab you can view or enter the client's address, including Country and E-mail address, their anniversary and birth dates, as well as the contract date, client number and any call warning messages they may have. This is where information about the clients' relatives is located as well. There is a check box for Saturday only.

    1. **Contract Date.** If your studio requires clients to sign a contract, use this field to record when the contract was received.

    2. **Call Warning.** Call Warnings are messages that appear on the Client Screen alerting users to special instructions, such as "This is a surprise party—don't talk to spouse." If there is a call warning for a client, it will appear next to the phone number anywhere it is listed in Portrait One Manager.

3. **Family Members.** When you double-click in this window, a new screen appears. This is the Family Members Screen. Here you will enter the name of the family member, the relationship and birthday along with their phone numbers and E-mail addresses. To add a new family member, enter the new family member information and then click Add. To modify an existing family member, simply click the desired family member from the list, modify the information, and click Add. When you're finished entering all family members and their information, click the button labeled Close.

4. **Lead Source.** Use the Lead Source field to record how this client heard about you (What is the source of this lead?). This information can be critical in reviewing sales analysis reports.

5. **Client Number.** Portrait One Manager will automatically assign the Client Number, however, you can modify the number to another UNIQUE number.

6. **Saturday Only.** The Saturday only check box can be used to note which clients prefer to book sessions or appointments on Saturday only.

- **Custom Tab.** Portrait One Manager gives you ten customized fields that you can use for whatever you want. You can define how these fields are labeled in the Company Preferences, Clients tab.

- **Groups Tab.** The Groups tab lists all of the available Groups in the left pane and all of the Groups that the client belongs to in the right pane. "Groups" is a great way to maintain your client list. You can manage your clients by categorizing them into groups such as high school, prospect, portrait client, wedding client, commercial client, etc. Other Groups might include wedding or possibly troublesome clients you would rather not have back. (See the client tab portion of the section labeled "Company Preferences" for details on how to add, delete and modify your Groups.)

- **Marketing Plan Tab.** The Marketing Plan tab lists all of the available Marketing Plans in the left pane and all of the Marketing Plans that the client belongs to in the right pane. "Marketing Plans" is a great way to keep your clients informed of your studio's various promotional events. Marketing plans also remind the clients of special events in their lives for which they may desire photos. Once you've discovered your client's interests, use this section to note those interests on the client's record. For date sensitive events, (i.e. Birthdays), Portrait One Manager will automatically create the call record x number of days prior to the special date. (The number of days is set by the user in the user preferences. See the section labeled "Features of the Company Preferences Screen" for details.) This allows you to call the client, remind him/her of the special date, and book the session. Non date-sensitive events can be filtered later to generate the phone calls, e-mails or perhaps to generate the mail merge. (See company preferences section labeled "Features of the Company Preferences Screen" for information on setting up the marketing plans.)

Pathways to Success

Marketing Plans can be a key to the success of your studio. If you use nothing else in Portrait One Manager, use this feature. Using it can significantly increase your sales revenue. For example, if you have a few empty time slots for sessions in a few days, you could use Portrait One Manager to find those clients who have already indicated an interest in conducting a Fall Colors session. Find those clients, call them up, and book those sessions. Be creative in how you use this feature, and be more successful.

- **Phone Call Tab.** The Phone Call tab lists all phone calls, completed or not, related to this client.

  1. **Description.** A phone call description tells you what type of call to place to the customer, such as a reminder that their son's birthday pictures need to be scheduled.

  2. **Due Date.** The due date is the date that the call is to be made.

  3. **Target Date.** The target date is only related to marketing plans and is the date for which the photography session is planned.

- **Appointments Tab.** The Appointments tab lists all appointments, completed or not, related to this client. To view the complete details of the appointment, double-click on it in the list.

  1. **Appointment Description.** An appointment description tells you why you have set up the appointment. It could be something like "wedding consultation with Bill and Sue to finalize session time". This is displayed on the calendar browse screen.

  2. **Appointment Date.** The Appointment Date is the date that the appointment is to take place.

  3. **Appointment Type.** An appointment type would be something like "lunch appointment".

- **Sessions Tab.** The Sessions tab lists all sessions, completed or not, related to this client.

    1. **Date.** This is the date the session is to be held.

    2. **Type.** This is the type of session being held.

    3. **Description.** The session description tells you why you have set up the session. It could be something like "Johnson family portrait".

    4. **Status.** This is where the session is currently within the production cycle.

Here's a Flash for You!

A session will remain open or active until all session activities have been completed. Even after the actual photography portion of a session is completed, still other events may be outstanding. Use the Session Status Maintenance List to setup your session statuses.

- **Invoices Tab.** The Invoices tab lists all invoices generated for this client.

    1. **Invoice Number.** The invoice number is assigned by Portrait One Manager but is modifiable.

    2. **Invoice Date.** The invoice date is the date that the invoice was created.

    3. **Invoice Total.** The invoice total is the total for that invoice.

    4. **Amount Paid.** The amount paid is how much has already been paid toward that invoice.

    5. **Balance Due.** The balance due is the amount still owed for that invoice.

- **Production Tab.** The Production Tab is used to quickly find the status of an order that is in production.

- **Summary Tab.** The Summary tab lists three types of detail. These are Dates, Financial Status and Financial Transaction History.

    1. **The Dates Section.**

        a. **Create Date.** The Create date is the date that the client record was created.

        b. **Last Session.** The Last Session date is the date that the client was most recently in for a session.

        c. **Last Call Date.** The Last Call date is the date that the client was most recently called on the phone.

2. **The Financial Status Section.**

   a. **Sales Figures.** The sales figures are split into Lifetime Sales and YTD Sales. Lifetime sales are those sales that have been recorded since you've started using Portrait One Manager for this client. YTD sales are those sales that have been recorded since January 1st of this year. The sales figures are also split into Session Sales and Bill-To Sales. For most clients, these numbers are the same. Session sales are all the sales made where this client is the client being photographed. Bill-to sales are all the sales made where this client is paying the bill. An example may be a wedding couple is the session client, but the bride's parents are paying the bill and therefore they are the bill-to clients.

   b. **Open Balance.** Open Balance is the total of the invoices Not Yet Due and Past Due.

   c. **Not Yet Due.** Not Yet Due is a total of all invoices that have been created for this customer that have not yet come due.

   d. **Past Due.** Past Due is a total of all invoices that have come due but remain unpaid.

3. **The Financial Transactions History Section.** The Financial Transactions History Section lists individually the date, description and amount of all of the invoices, credit memos, payments, and refunds for this client in chronological order. Most recent on top. Double-click on any payment or invoice to bring it up and view all of its details.

- **Notes Tab.** The Notes tab is a memo field where you can enter any notes about the client you need to.

Pathways to Success

Have you noticed our waving flags yet? Throughout Portrait One Manager, you may see a red or yellow waving flag. Obviously, this is something important that you should pay attention to. Perhaps the client has an outstanding invoice and owes you money, the client has an overdue phone call, or some notes should be looked at on the notes tab. Allow Portrait One Manager ensure that you and your staff don't overlook key pieces of information when working with your clientele.

Adding New Clients

If all you need to do is enter a new client, click File $\Rightarrow$ New Client (or Ctrl-N) from any Browse Screen. This launches the Client Wizard to take you step by step through entering a new client into your database. Begin the entry of information. After each page, click Next to advance through the New Client Wizard. See the "Features of the Client Information Screen" for more detailed information.

The Client Wizard Screen

![icon] **Here's a Flash for You!**

Advanced users may choose to create a new client directly in a Client Information screen. To disable the new client wizard, go to User Prefs.)

Finding Existing Clients

Change to the Client Browse Screen using the Browse Menu (or click View ⇒ Client or F3).

The Client Browse Screen

Set the Search Criteria in the upper right corner and press Enter. All clients matching your request will be shown.

> **Here's a Flash for You!**
>
> Just type in the first couple of characters and Portrait One Manager will display all clients with names beginning with those characters. Example, type in "Jo" will bring up all customers with the name of Johnson, Jones, Jordan, etc.

Click on one of the column headers and it will sort the list in ascending order. Click again and it will sort in descending order.

Click on the client that you wish to view, and then double-click on it to open the Client Information Screen. You can then proceed to view, modify, or delete any information you want.

Deleting Clients

1. To find the client you want to delete, follow the steps outlined in the topic "Finding Existing Clients".

2. At the client screen with the desired client active, click on the Delete icon from the toolbar. This will remove the entire client record from the database.

> **Here's a Flash for You!**
>
> Clients with session invoice, appointment or phone call records cannot be deleted.

Working With Sessions

Features of the Session Information Screen

The Session Information Screen is used to store all pertinent session information and to display other related information regarding this session from other screens. Some of the session information stored here includes session date, time, location, photographer, assistant, and participating family members. All phone calls, invoices, and production information related to this session are also listed on one of the detailed tabs. New phone calls and invoices can also be created for this session by clicking on the appropriate button on the tool bar. In addition, all post session production information related to this session can also be accessed from this screen. To launch the Session Information screen, double click on any session from the Session Browse screen. The Session screen is divided into four sections:

The Session Information Screen

1. **Menu Bar.** The four menu choices are File, Edit, Action and New.

   - **File Menu.** From the File menu you can save, delete and print the Session records as well as exit the Session screen.

     1. **Save.** To save the Session record:
        - You can just save the record by choosing Save
        -Or-
        - You can save the record and close the Session screen by clicking Save and Close
        -Or-
        - You can save the record and get a blank screen to add another Session record for the same person by clicking Save and New.

     2. **Delete.** To delete a Session record, bring up the record you want deleted and then choose the Delete option from the File menu.

     3. **Acquire Images.** To create jpeg previews of all the images taken for this session, use the Acquire Images feature. Images are then available for preview on the Images tab, available for a slide show, and then

available for ordering with a digital invoice. See the section on Working with Digital Imaging for more information.

4. **Print Session Confirmation.** Use this feature to print a Session Confirmation for this client. It's recommended that you print two copies, one for the client, and one for your records.

5. **Print Contact Sheet.** Use this feature to print a Contact Sheet, which shows all the images acquired for this session along with their image numbers.

6. **Print Mailing Label.** Use this feature to print a mailing label showing the client's name and address for this session.

Here's a Flash for You!

If you want more options printing a single label, see the Company Preferences, Reports tab, and set the Single Mailing Label to Prompt for Printer.

7. **Print Account Label.** Use this feature to print an account label showing the client's name, address, phone number, and client number for this session.

8. **Print Session Label.** Use this feature to print a session label showing the client's name, client number, session date, time, type, photographer, and session number for this session.

9. **Print Form Letter.** Use this feature to print a custom form letter or contract specific for this session.

10. **Exit.** To exit the Session screen, choose Exit from the File menu.

- **Edit Menu.** From the Edit menu you can Cut, Copy and Paste selected text to and from the clipboard.

  1. **Cut.** You can cut text by highlighting the text you want to cut and then choosing Cut from the Edit menu.

  2. **Copy.** You can copy text by highlighting the text you want to copy and choosing Copy from the Edit menu.

  3. **Paste.** You can paste previously cut or copied text from a large variety of applications by first cutting or copying the text and then placing your cursor in the desired location in the Session record and choosing Paste from the Edit menu.

- **Action Menu.** From the Action menu, you can show a slide show and make an archive CD.

  1. **Change Slide Show Settings.** Use this feature to set your custom settings before starting a slide show.

2. **Start Slide Show.** Use this feature to start the slide show.

3. **Stop Music.** Use this feature to stop the music after a slide show has completed.

4. **Make an Archive CD.** Use this feature to copy all the images related to this session to an Archived CD.

- **New Menu.** From the New menu, you can add a New Call or a New Invoice for the current session record.

  1. **New Completed Call.** To create a phone call that has already been completed, use this feature.

  2. **New Future Call.** To create a phone call that needs to be made in the future, use this feature.

  3. **New Appointment.** To create a new appointment record for this client, use this feature.

  4. **New Invoice.** To create a new invoice for this session, use this feature.

  5. **New Proof Order.** To create a new proof order for this session, use this feature.

  6. **New Email.** To send a new email to this client, use this feature.

2. **Tool Bar.** Many of the same options from the Menu Bar can be found on the toolbar. If you place your mouse cursor over the icon and hold it there, a text box will pop up (called a tool tip) with the name of the action that is tied to the icon. Simply click on the corresponding icon for the desired action you want to perform.

3. **Header Section.** This is where the client's first and last name and client phone numbers are located or entered. You will also see any Call Warnings for this session listed here.

4. **Detail Section.** This is where all of the details of the Session are located. Each tab holds corresponding information about the client and session.

- **General Tab.** From the General tab, you can view or enter the session description, the session type, the session date, the session start time, the session end time, the studio, photographer, the assistant and the outside location, if any.

  1. **Session Description.** The Session Description is an optional field where you may enter a brief description about the session such as "Family Session".

  2. **Session Type.** The session type is chosen from a drop down list box. You may define as many session types as you desire. Session Types are created under Maintenance, Item Maintenance. Refer to the section on Application Maintenance for more information.

  3. **Date.** The Date field is used to record the date on which the session will take place.

4. **Start.** The Start field is used to record the time the session will begin. You can type this in or choose it from the drop down list box.

5. **End.** The End field is used to record the time that the session will finish. You can type this in or choose it from the drop down list box.

6. **Studio.** The Studio field is used to record which studio, if any, where the session will take place. You can type this in or choose it from the drop down list box.

7. **Photographer.** The Photographer field is used to record the name of the person taking the photographs. You can type this in or choose from the drop down list box.

8. **Assistant.** The Assistant field is used to record who, if any one, will be helping the photographer. You can type this in or choose from the drop down list box.

9. **Session Number.** The Session Number is a unique number that is assigned to each session by Portrait One Manager.

10. **File Number.** The File Number is a field that you can use to record any special number that your studio uses to track sessions.

11. **Date Booked.** The Date Booked automatically records the date this session record was created.

12. **Session Status and Due Date.** The Session Status and Due Date records the current status for this session, and the date this session is due to advance to the next stage. See the section Working with Post Session Production Procedures for more information on this feature.

13. **Outside Location.** Outside Location is a field you can use to enter information as to the location of any sessions that will take place outside the studio. This field will only appear if the Studio field is set to Outside Location.

14. **Confirmed.** Check the confirmed box if this session has been confirmed with the client. Doing so will show the word 'Confirmed' on the calendar next to this session.

- **Custom Tab.** Portrait One Manager gives you ten customizable fields for each session where you can enter whatever information you want. To change the labels that appear next to each field, see the Sessions and Appointments tab in the Company Preferences.

- **Wedding Tab.** If this session is a wedding, you can view or enter wedding information on this tab.

  1. **Bride's Name and Address.** Use these fields to record the bride's name and address. If her address is the same as the main client, simply click the copy button next to these fields.

2. **Groom's Name and Address.** Use these fields to record the groom's name and address. If his address is the same as the main client, simply click the copy button next to these fields.

3. **New Address.** Use these fields to record the bride and groom's new address. If this address is the same as the main client, simply click the copy button next to these fields.

4. **Two Pre-ceremony Locations.** Use these fields to record one or two locations where pictures need to be taken prior to the ceremony.

5. **Ceremony Location.** Use these fields to record the location of the ceremony.

6. **Reception Location.** Use these fields to record the location of the reception.

- **Senior Tab.** If this session is for a high school senior, you can view or enter senior information on this tab.

  1. **School Name.** Select the school name for the list of High Schools. All the remaining school-related fields will automatically fill in.

  2. **Parent's Name and Phone.** Enter the parent's name and phone number here.

  3. **Graduation Year.** Enter the year the client will be graduating here.

- **Promotions Tab.** The Promotion tab is used to record one or more promotions that this session belongs to.

Pathways to Success

Give some thought to how you could use Promotions to more effectively manage your business. A promotion might be something like Santa Claus, Bunnies, Fall Colors, etc. A promotion might also be something like Spring Sale, Two-for-One, Free Session Fee, or Referral Coupon. If you're recording this promotion information, then you'll be able to generate analysis report information on the effectiveness of the various promotions that you run. Never again will you wonder whether or not you should run a promotion again. You'll know what works and what doesn't—profitwise.

- **Participants Tab.** Use the Participants tab to record which family members will be participating in this session.

- **Phone Calls Tab.** The Phone Calls tab displays all phone calls for this session, regardless of status. To access the complete details of the phone call, double-click on the desired call record.

  1. **Call Description.** The Call Description briefly explains the reason for the call.

2. **Due Date.** The Due Date is the day the call is to be placed.

3. **Target date.** The Target Date is the day of the event you're calling about. For example, you might call on January 2nd (Due Date) for Valentine's Day pictures (February 14th Target Date) .

4. **Completion Date.** The Completion Date is the date when the client was actually contacted.

- **Invoices Tab.** The Invoices tab lists the invoice number, invoice date, invoice total, amount paid and balance due. This tab is identical to the one found on the client screen with the exception that the invoices listed here are only for this particular session.

  1. **Invoice Number.** The invoice number is assigned by Portrait One Manager.

  2. **Invoice Date.** The invoice date is the date that the invoice was created.

  3. **Invoice Type.** The invoice types are Print Order, Session Fee, Estimate, and Credit Memo.

  4. **Invoice Total.** The invoice total is the total due for that invoice.

  5. **Amount Paid.** The amount paid is how much has already been paid toward that invoice.

  6. **Balance Due.** The balance due is the amount still owed for that invoice.

- **Production Tab.** The Production tab lists information related to production orders that have been created for this session. Click the desired option button to display either proof orders or production orders. This tab also records information about the number of proofs that have been created for this session, the location the proofs are stored in, or the CD the images have been archived to.

  1. **Order Number.** The Order Number is the Number assigned by Portrait One Manager to the negatives when they are sent to the lab for developing.

  2. **Date.** The Date is the date when the negatives were sent to the lab for developing.

  3. **Vendor.** The Vendor is the name of the lab that will develop the negatives.

  4. **Type.** The Type indicates what was ordered, either prints or proofs.

  5. **Status.** The Status section indicates where in the process the order is currently.

- **Images Tab.** The Images Tab displays thumbnail images of this session. See the section "Working With Digital Imaging" for further information.

- **Notes Tab.** The Notes tab contains two notepads. The Session Notes field is a place where you can enter any notes regarding a session. The Status

Log Notes is a read-only field that displays a history of the statuses for this session.

Pathways to Success

Have you noticed our waving flags yet? Throughout Portrait One Manager, you may see a red or yellow waving flag. Obviously, this is something important that you should pay attention to. Perhaps the client has an outstanding invoice and owes you money, the client has an overdue phone call, or some notes should be looked at on the notes tab. Allow Portrait One Manager to ensure that you and your staff don't overlook key pieces of information when working with your clientele.

Adding a New Session

You may add a new session using either of the following options:

1. **From Calendar.** The most common method of entering a new session is directly off the Calendar Browse screen. Double-clicking on an empty time segment will launch the scheduling wizard and walk you through the scheduling process for either a new or existing client. (The scheduling wizard CANNOT be disabled through User Prefs.)

2. **From a Client.** An alternative method of entering a new session is directly off a Client Information screen. Click New$\Rightarrow$ Session to launch a new session wizard. (Advanced users may choose to disable the session wizard through User Prefs.)

Finding Existing Sessions

1. From the Browse menu, choose Sessions. This will bring up the Session Browse screen.

2. Click and hold the down arrow next to the Last Name option of the search by list box and highlight the criteria by which you want to search.

3. Release the mouse button and that option will then be displayed.

4. Type in the criteria by which you want to search and press Enter. (e.g., city name, if you chose to search by city.)

5. All of the sessions that match the criteria which you have chosen will then be displayed. Matching sessions can be sorted by clicking on any one of the column headings in the grid. If you can't find the desired session, use the scroll bar or choose another criteria to search by.

6. When you find the correct session, click on the desired record and then double-click on any field in that record to bring up the Session Information screen.

Deleting Sessions

1. To find the Session you want to delete, follow the steps outlined in the topic Finding Existing Sessions. Double click on the session to launch the Session Information Screen.

2. At the Session Information screen, click on the Delete icon from the toolbar. This will remove the entire Session record from the database.

Here's a Flash for You!

Sessions with invoices or production records cannot be deleted.

Working With Appointments

Features of the Appointment Information Screen

The Appointment Information Screen is used to store all pertinent appointment information. Some of the appointment information stored here includes the appointment description, the type of appointment, the location of the appointment, the appointment date and the beginning and ending times of the appointment. From this screen, you can also set the default color in which the appointment type will be displayed on the Calendar Browse screen. You can also access the Client Information screen by clicking on the Go To Client button on the tool bar. Double-clicking on any existing appointment from the Calendar Browse Screen launches the Appointment Information Screen.
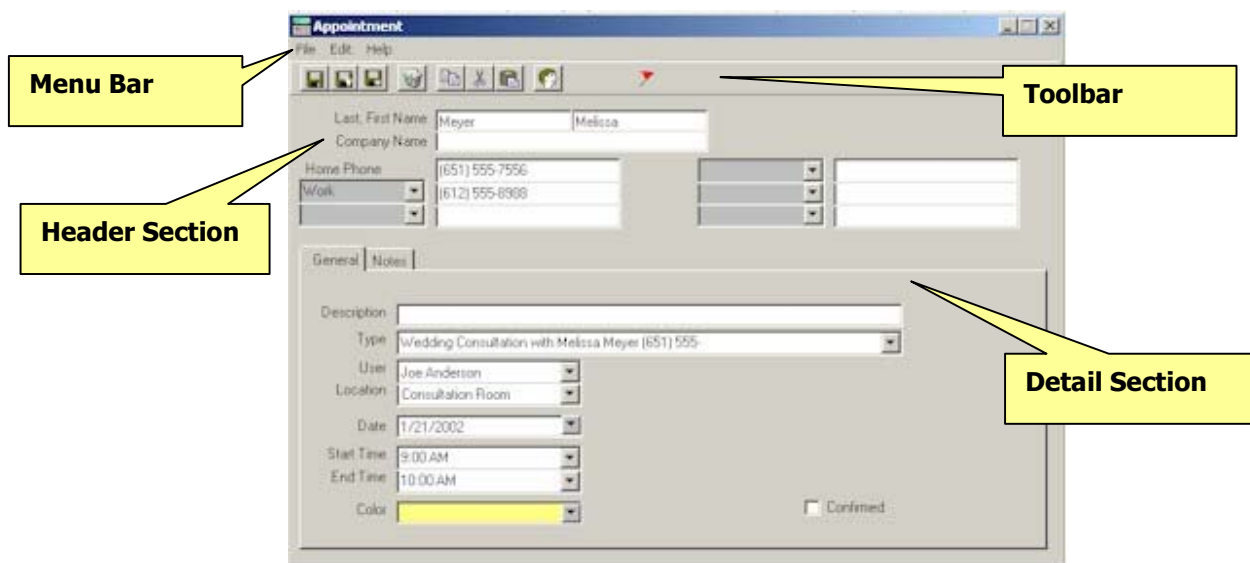
The Appointment Information Screen

1. **Menu Bar.** The two menu choices are File and Edit.
   - From the File menu you can save and delete the Appointment records as well as exit the Appointment screen.

     1. **Save.** To save the Appointment record.
        - You can just save the record by choosing Save
        -Or-
        - You can save the record and close the Appointment screen by clicking Save and Close
        -Or-
        - You can save the record and get a blank screen to add another Appointment record by clicking Save and New.

     2. **Delete.** To delete an Appointment record, bring up the record you want deleted and then choose the Delete option from the File menu.

     3. **Exit.** To exit the Appointment screen, choose Exit from the File menu.

   - **Edit Menu.** From the Edit menu, you can Cut, Copy and Paste selected text to and from the clipboard.

1. **Cut.** You can cut text by highlighting the text you want to cut and then choosing Cut from the Edit menu.

2. **Copy.** You can copy text by highlighting the text you want to copy and choosing Copy from the Edit menu.

3. **Paste.** You can paste previously cut or copied text from a large variety of applications by first cutting or copying the text and then placing your cursor in the desired location in the Appointment record and choosing Paste from the Edit menu.

2. **Tool Bar.** The icons are shortcuts to all of the various menu choices. If you place your mouse cursor over the icon and hold it there, a text box will pop up (called a tool tip) with the name of the action that is tied to the icon. Simply click on the corresponding icon for the desired action you want to perform.

3. **Header Section.** The Header Section holds general client information such as client name, phone numbers, and call warnings, only if this appointment is linked to a client.

4. **Detail Section.** The Detail Section holds all of the appointment specific information. This information is contained in two separate tabs, the General tab and the Notes tab.

- **General Tab.** The General tab lists the description and type of appointment, the location of the appointment, the appointment date and the beginning and ending times of the appointment. You can edit the color in which the different appointment types display on the Calendar Browse screen.

    1. **Appointment Description.** An appointment description provides information on why you set up the appointment. It could be something such as "wedding consultation with Bill and Sue to finalize session time".

    2. **Appointment Type.** An Appointment Type would be something such as "lunch appointment". You can either type in the appointment type or choose it from the drop down box. The drop down box can be edited from the Company Preferences screen. Appointment types that are typed in are not added to the drop down list. This information is displayed on the Calendar Browse screen.

    3. **User.** The User is the staff person with whom the appointment is made.

    4. **Location.** The Location field indicates where the appointment is to be held, such as the "consultation room". Choose this field from the drop down box.

    5. **Date.** The Appointment Date is the date on which the appointment is to take place. You can type in the appointment date or choose it from the mini calendar. A fast way to enter any date in Portrait One Manager is MMDDYY, or 051203 for May 12, 2003.

    6. **Start.** The Appointment Start time is when the appointment begins. You can type in the appointment start time or choose it from the drop down box.

7. **End.** The Appointment End time indicates when the appointment ends. You can type in the appointment end time or choose it from the drop down box.

8. **Change Color.** Clicking on the Change Color button brings up a color pallet. From this point, just click on the color you want the appointment background to be displayed in on the Calendar Browse Screen. You can also design your own custom colors.

9. **Confirmed.** Check the confirmed box if this appointment has been confirmed with the client. Doing so will show the word 'Confirmed' on the calendar next to this appointment.

- **Notes Tab.** The Notes tab is a memo field where you can enter any necessary notes about the appointment.

Add a New Appointment

You may add a new appointment by using either of the following options:

From Calendar. The most common method of entering a new appointment is directly off the Calendar Browse screen. Double-clicking on an empty time segment will launch the scheduling wizard and walk you through the scheduling process for either a new or existing client. (The scheduling wizard CANNOT be disabled through User Prefs.) If you want to create a simple, unlinked appointment on the calendar, simply click once on an empty time slot and start typing. Press Enter when done and then resize the appointment box to change its start and end times.

From a Client. An alternative method of entering a new appointment is directly off a Client Information screen. Click New⇒ Appointment to launch a new appointment wizard. (Advanced users may choose to disable the appointment wizard through User Prefs.)

Finding Existing Appointments

Finding Appointments for a Specific Client

1. From the Client Browse Screen, enter the client's last name in the field provided. Press Enter.

2. All matching records will be displayed. If the client you are looking for is not visible, use the scroll bar to locate them. You can sort the records by clicking on any column heading in the grid.

3. Double-click in any field within the records row to bring up the Client Information Screen.

4. Click on the Appointments tab.

5. Locate the appointment and double-click on the appointment you wish to view.

Viewing Daily, Weekly, Monthly or Multiple Appointments

1. To view a daily appointment schedule for a single user or location, go to the Calendar Browse Screen. Find the date you want to view and click on it. (For help on finding specific dates see the topic "Features of the Calendar.")

2. From the list of users, click on the desired user. This will display their schedule in the time line. Use the scroll bar to scroll up and down the timeline to view the day's schedule. To de-select a user, highlight their name in the user list and press Ctrl + left click.

3. To view the schedule of a location only, Ctrl + left click on the current user name in the user list and left click on the location name from the locations' list.

4. Follow step 2 above to view the entire day and de-select the location.

5. See the topic "Features of the Calendar" for help in viewing multiple days, weeks, multiple users and locations, etc.

Deleting Appointments

1. Follow the steps 1-5 outlined in the section titled "Finding Existing Appointments" to locate the desired appointment. Double-click on the appointment you want to delete to launch the Appointment Information screen.

2. When you have brought up the appointment you want to delete, click on the Delete icon from the toolbar.

Working With Phone Calls

Features of the Phone Call Information Screen

The Phone Call Information screen is used to record a phone call that has already taken place with your client or that needs to take place with your client in the future. A call is considered completed once you fill in a Complete Date. An easy way to complete a call is to click the Complete Call button on the toolbar.
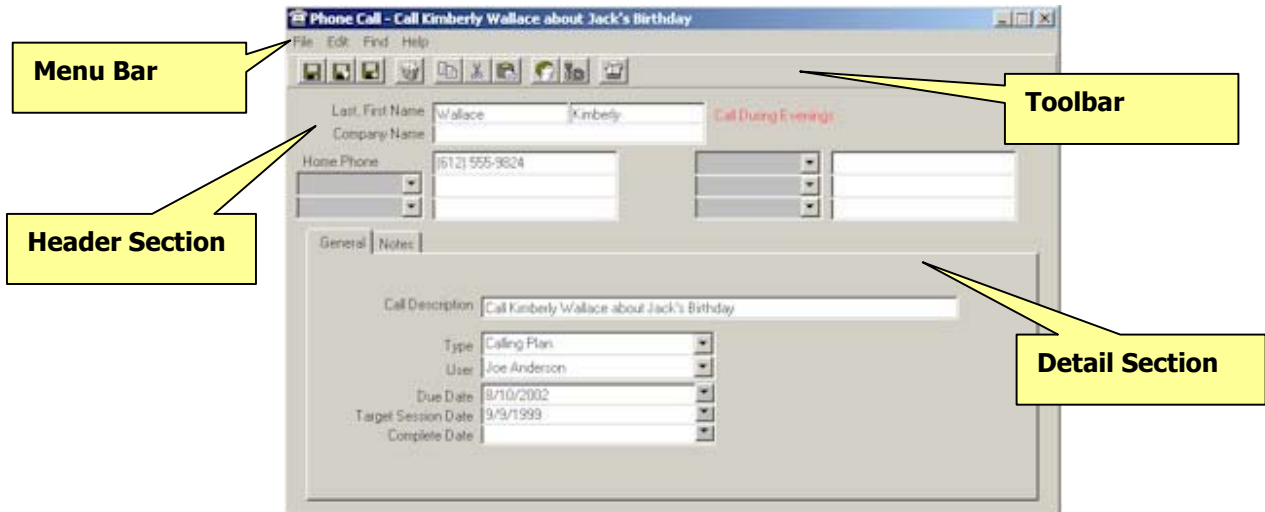
The Phone Call Information Screen

1. **Menu Bar.** The three menu choices are File, Edit, and Find.

    *   From the File menu you can save and delete the Phone Call records as well as exit the Phone Call screen.

        1. **Save.** To save the Phone Call record.
            *   You can just save the record by choosing Save
            -Or-
            *   You can save the record and close the Phone Call screen by clicking Save and Close
            -Or-
            *   You can save the record and get a blank screen to add another Phone Call record by clicking Save and New.

        2. **Delete.** To delete a Phone Call record, bring up the record you want deleted and then choose the Delete option from the File menu.

        3. **Exit.** To exit the Phone Call screen, choose Exit from the File menu.

    *   **Edit Menu.** From the Edit menu, you can Cut, Copy and Paste selected text to and from the clipboard.

        1. **Cut.** You can cut text by highlighting the text you want to cut and then choosing Cut from the Edit menu.

        2. **Copy.** You can copy text by highlighting the text you want to copy and choosing Copy from the Edit menu.

3. **Paste.** You can paste previously cut or copied text from a large variety of applications by first cutting or copying the text and then placing your cursor in the desired location in the Phone Call record and choosing Paste from the Edit menu.

2. **Tool Bar.** The icons are shortcuts to all of the various menu choices. If you place your mouse cursor over the icon and hold it there, a text box will pop up (called a tool tip) with the name of the action that is tied to the icon. Simply click on the corresponding icon for the desired action you want to perform.

3. **Header Section.** The Header Section holds general client information such as client name, phone numbers, and call warnings about the client this phone call is linked to.

4. **Detail Section.** The Detail Section holds all of the phone call specific information. This information is contained in two separate tabs, the General tab and the Notes tab.

- **General Tab.** The General tab lists the description and type of the phone call, the user the call is assigned to, and any dates related to the call.

  1. **Call Description.** Enter a description that you want to use to describe what this call was about or why you need to make this call in the future. (e.g. Call Mrs. Jones about Samantha's birthday pictures.)

  2. **Type.** Select a phone call type from the list. You can alter this list on the Phone Call tab of the Company Preferences. (e.g. Prospect Call, Session Confirmation, Birthday Reminder, etc.)

  3. **User.** Select the user that made this call or that should make this call in the future.

  4. **Due Date.** If this phone call is to be made in the future, select or enter the date the call should be made on.

  5. **Target Session Date.** If Portrait One Manager automatically creates this call as a birthday reminder, it will put the child's birthday in this field.

  6. **Complete Date.** Once a call has been completed, enter the completion date here. An easy way to complete this field with today's date is to click the Complete Call button on the toolbar.

- **Notes Tab.** Enter any notes that you want to detail this phone conversation on the notes tab.

Adding New Phone Calls

1. From the Client Information or Session Information Screen, click the Create New Call button. This will bring up the Phone Call Information Screen.

2. Type in the description of the phone call.

3. Choose the type of phone call from the type list box.

4. Choose the user that will make the call, if necessary, from the user list box.

5. Edit the due date of the phone call, if necessary, or choose it from the calendar on the right. The due date defaults to the current date.

6. Enter the date the session is scheduled for in the Target Date field, if necessary.

7. After the phone call has been placed, enter the completed date in the Complete Date field or click on the "Complete" button on the toolbar.

8. Click on the Notes tab to enter any notes that you want to attach to this appointment.

Finding Phone Calls

Finding a List of Today's Uncompleted Calls

To find a list of phone calls that must be made today, pull up the Phone Call Browse screen. The screen defaults to show all of your uncompleted calls, in order of past due phone calls, today's required phone calls and then a listing of all other uncompleted calls. To view the detail of any phone call, click on the desired line to select the call and then double-click to open the Phone Call Information screen.

Finding a List of Calls for an Individual Client

To find a list of phone calls related to a specific client, open the client's information screen and click the Phone Calls tab. All completed and non-completed calls related to this client will be shown. Double-click on a line to view the Phone Call Information screen.

Working With Digital Imaging

Digital Imaging Overview
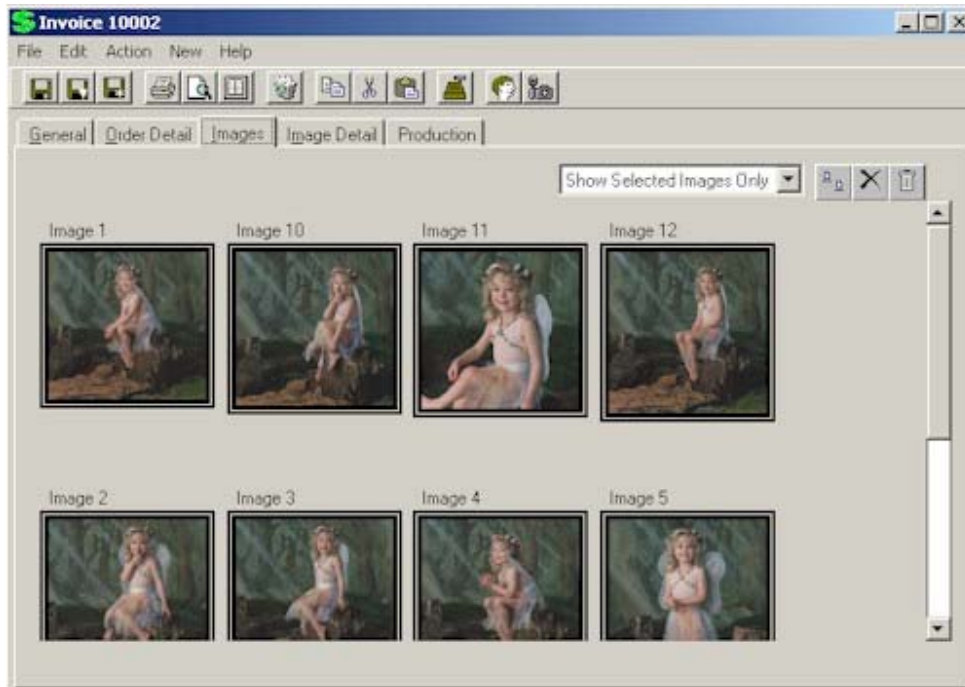
The Invoice Screen – Images Tab

Portrait One Manager is more than just a great management software tool—it's also a great **imaging** software. Whether you shoot digitally or receive digital images from your lab, you can benefit from Portrait One Manager' digital sales presentation, digital workflow management, and image management capabilities. Here's an overview of how to utilize the exciting tool of digital imaging with Portrait One Manager.

1. Capture the images from the digital camera or receive a CD of images from the lab.

2. Acquire the images into Portrait One Manager, a process where jpeg previews are created.

3. Prepare and present the Portrait One Manager slide show with music to the client.

4. While still in slide show mode, eliminate images that the client is not interested in using special hot-keys.

5. Compare images side by side to help the client in their decision making process.

6. Record the customer's order information and any special notes for production.

7. Confirm the order with the client and save it.

8. Print an Invoice and an Image Detail Sheet for the client to take with them.

9. Print an optional Contact Sheet of all the images for the client.

10.	After the client leaves, convert the invoice into one or more Production Orders for each vendor.

11.	Use the Order Detail screen to open images up in Photoshop for retouching, cropping, or other enhancing.

12.	Use Portrait One Manager to create a Lab CD or use Portrait One Manager to FTP image files directly to the lab for printing.

13.	Use the Production Browse Screen to track the status of the order.

14.	Use Portrait One Manager to create an Archive CD and to create a catalog of the archived images for future retrieval.

15.	All preview images are permanently archived in Portrait One Manager for future viewing.

Setup Portrait One Manager for Digital Imaging

1.	Select **Maintenance**⇒**Preferences**⇒**Company Preference**, and then click the **Digital** tab.
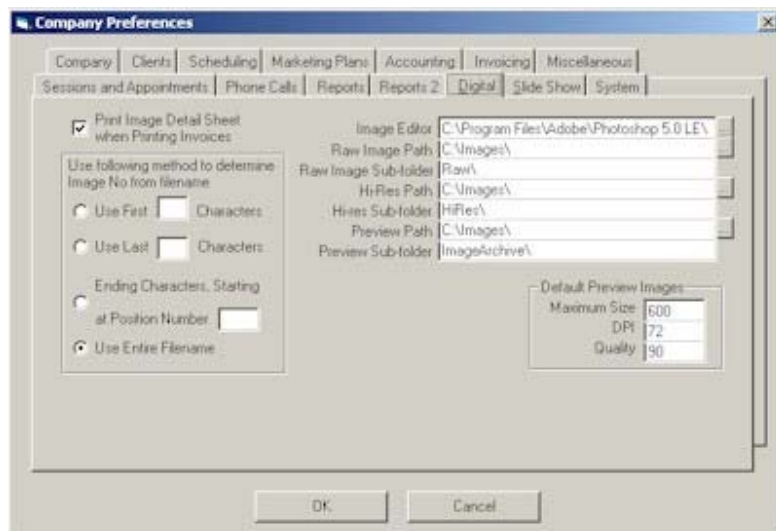
2.	Make sure the 'Print Image Detail Sheet When Printing Invoices' is checked.

3.	Select the appropriate option under 'Use following method to determine image number from filename.' See the following chart for examples:

Option	Filename	Image Number
Use First 3 Characters	013-S10001.jpg	13
Use Last 3 Characters	Larson004.jpg	4
Use Ending Characters Starting at the Position Number 8	S10001007.jpg	7

Use the Entire Filename	103.jpg	103

4.   Select your preferred Image Editor that you use to retouch images. For example, use the Browse button to find PhotoShop.exe to launch PhotoShop. This option should be set on each workstation you use for retouching.

5.   Set the Raw Image, Hi-Res, and Preview image paths. You need to give some thought to how you are currently storing, or how you want to start storing, your image files. Here's our recommendation! First, select a shared drive to which all of your workstations have access. We'll call it the 'S' drive. Next, create a folder for your images and label it 'Images'. Portrait One Manager will automatically create a folder in here for each session, and will also name it the session number. For example:

        S:\Images\10001\
        S:\Images\10002\
        S:\Images\10003\

Next, Portrait One Manager will create three sub folders for each session—one for the Raw Images, one for the Hi-Res Images, and one for the Previews. You can also create additional sub folders, if desired. For each session, here's an example for the sub-folder structure:

        S:\Images\10001\Raw\
        S:\Images\10001\HiRes\
        S:\Images\10001\Previews\

If you follow this recommendation, then this is how you should setup your preferences:

Raw Image Path	S:\Images\
Raw Image Sub-folder	Raw\
Hi-Res Path	S:\Images\
Hi-Res Sub-folder	HiRes\
Preview Path	S:\Images\
Preview Sub-folder	Previews\

6.   Click the **Slide Show** tab to set any title slides you want to show at the beginning or end of your slide shows. The slides need to be jpegs, can be of any size, and should have a black background. You can have between zero and four title slides at the beginning and between zero and two slides at the end.
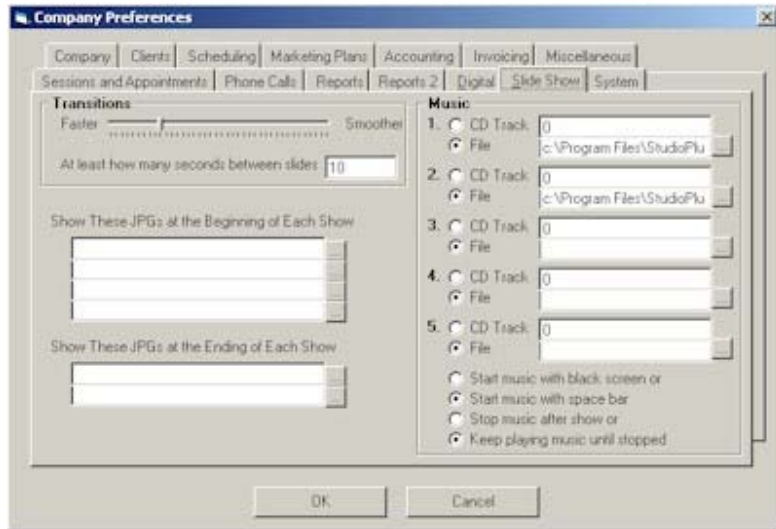
7. Click OK to save and close the company preference.

8. One more setting must be set in the user preferences. Click **Maintenance⇒Preferences⇒User Preferences**.

9. Make sure the Invoice Wizard checkbox is NOT checked. Click OK to close the form.

Acquiring Images

1. Open the Session Information Screen for the session you want to work with.

2. Click **File⇒Acquire Images**.
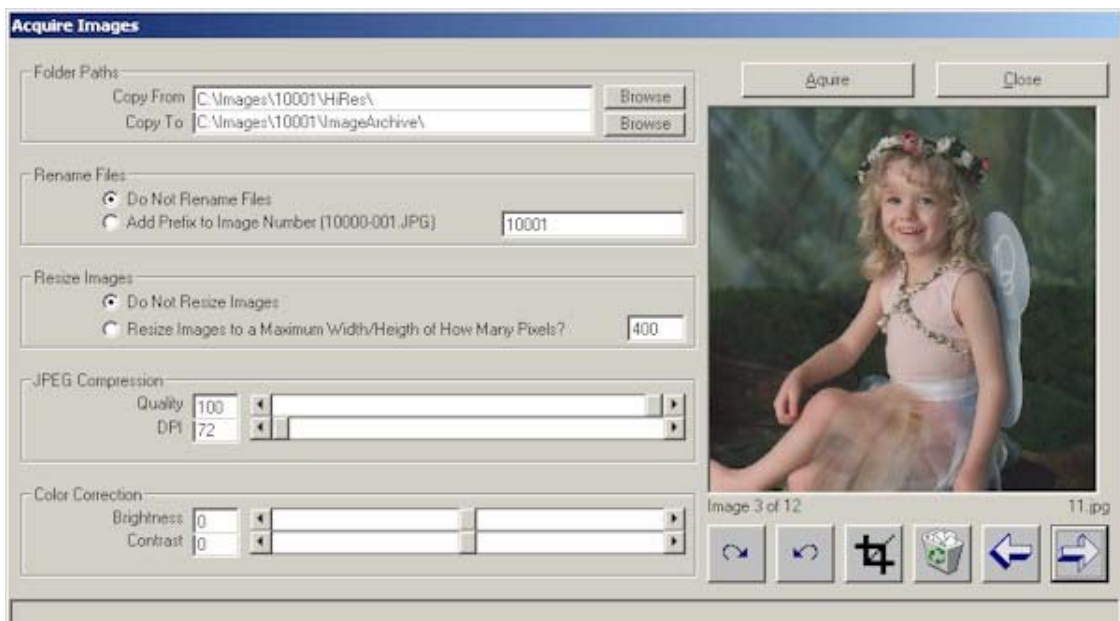
3.   Click the Copy From button and browse to the folder that contains the hi-res images. Once selected, you should see the first image in the preview window.

4.   Set the 'Resize Images to Maximum of 600 Pixels'. If your screen resolution is set to at least 1024 X 768, then you may want to increase the number to 700.

5.   Click Acquire to create the jpeg previews from the hi-res images. When completed, click the Close button.

6.   Click the **Images** tab on the Session screen to preview the images.

Presenting a Slide Show

Slide shows can either be played from a Session Screen or an Invoice Screen. More options are available from an invoice screen, such as the ability to arrange the images in a set order, hide undesirable images (not that you would have any, of course!), and use hot keys to record those images the client is or is not interested in.

To play a slide show from a Session:
1.   Open the Session Information Screen for the session you want to work with.

2.   Click **Action⇒Change Slide Show Settings** to set the music.
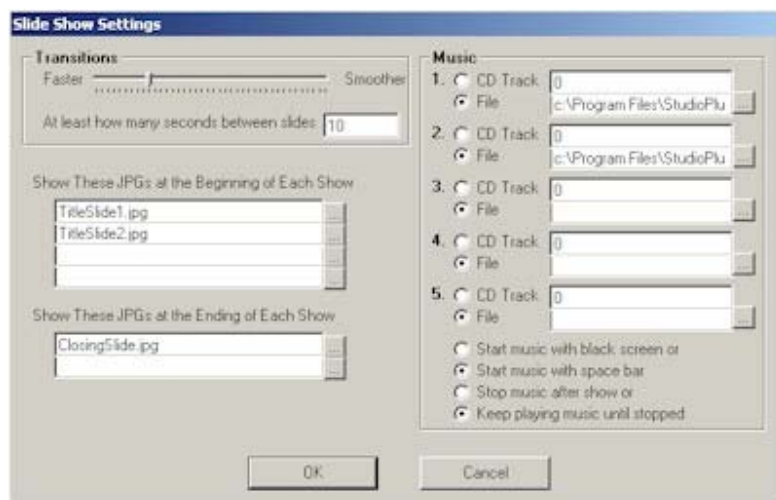
3.   Use mp3 files, wav files, or music directly off a music CD for your slide show. Mp3 and wav files are preferred. You can select between zero and five songs for each slide show. After the last song is played, the sequence is repeated. Click OK to save and close the Slide Show Settings.

4. Click **Action⇒Start Slide Show** to start the show. After the images are loaded, a black screen will be presented.

5. Press the Space Bar to start the show and the music. Press Esc to end the show. Click **Action⇒Stop Music** to stop the music.

To play a slide show from an Invoice:

1. Open the Invoice Information Screen or create a new one for the invoice you want to work with.

Here's a Flash for You!

Maximize the Invoice to maximize your viewing area.

2. Click the Images tab on the Invoice to view the images.
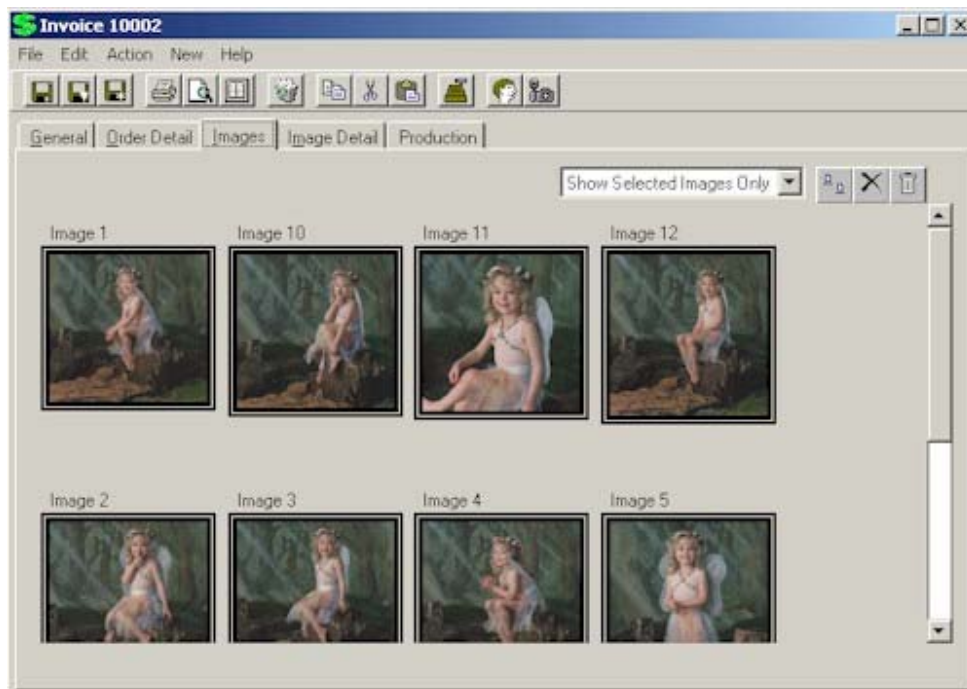
3.   Right-click on undesirable images and select Hide.

4.   Drag-n-drop the remaining images into the order you want them to appear in the slide show.

5.   Set the music as described above.

6.   Click **Action⇒Start Slide Show** to start the show. After the images are loaded, a black screen will be presented.

7.   Press the Space Bar to start the show and the music. Use the following hot-keys during the slide show.

Hot Keys When a Show is Paused

Esc	End show and return to previous form
Space Bar or P	Start or play automatic show
I	Show/Hide image numbers
H	Hide the current image and advance to the next image
Delete	Permanently delete the current image file
Home	Move to the beginning of the slide show
End	Move to the end of the slide show
Left Arrow, Up Arrow, or Page Up	Move to the previous slide
Right Arrow, Down Arrow, Or Page Down	Move to the next slide

Hot Keys When a Show is Playing

Space Bar	Manually advance to next slide (once the transition is rendered)
Esc	End show and return to previous form
I	Show/Hide image numbers
P	Pause automatic show
H	Hide the current image

8.   Press Esc to end the show. Click **Action⇒Stop Music** to stop the music.

9.   If you pressed 'H' during the slide show to hide any images, those images will now be hidden. You're now ready to proceed with the ordering process.

Compare Images

1.   From the **Invoice Images** tab, click the first image to be compared.

2.   Hold down the Ctrl key and click the second image to be compared. You can compare between one and six images at a time.

3.   Click the Compare Images Button on the top right portion of this tab to compare the images.

4.   Press Esc to close the Compare screen and return to the Invoice screen.

Capture the Client's Order

1. From the Invoice Images tab, double-click the first image the client wants to order. You'll be automatically taken to the **Image Detail** tab for this image. If you haven't already done so, maximize the Invoice to maximize your viewing area.
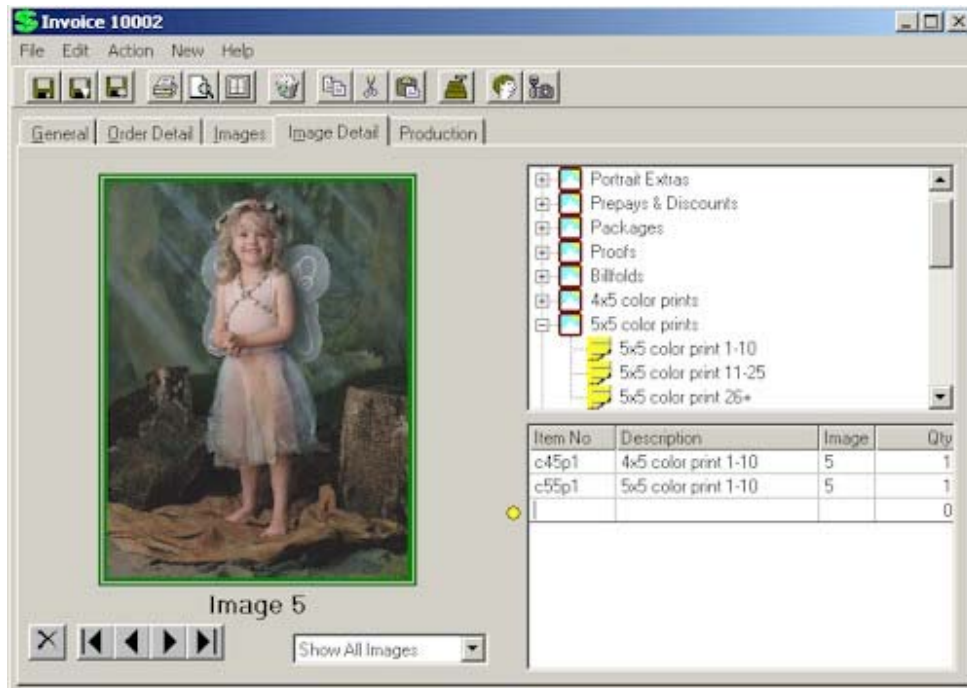
2. Select the products that the client wants to order for this image.

3. From here you can go back to the Images tab to find the next image or click the Next and Previous buttons below the image to scroll through all selected images.

4. After all products have been ordered, click the Order Detail tab to review all products and total dollar amounts.
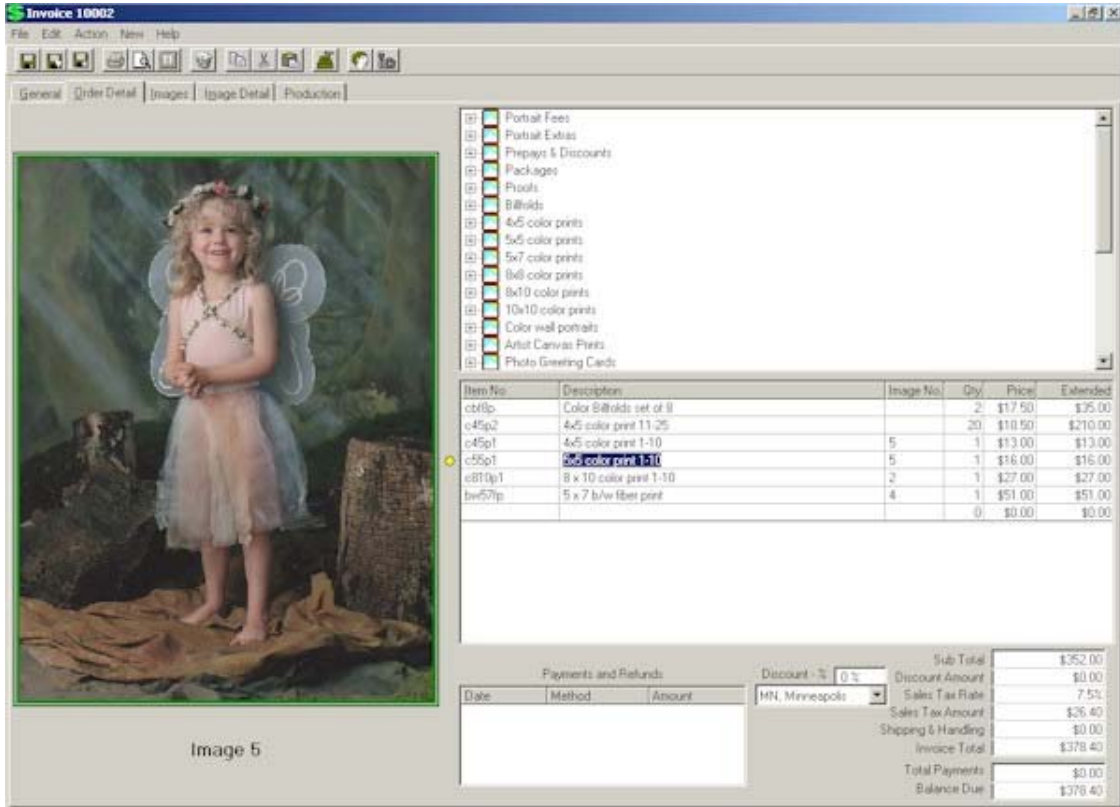
The Invoice Information Screen – Order Detail Tab

5. Click Save to save the invoice. Click the New Payment button to record the client's down payment.

6. After recording the client's payment, click the Print button to print an Invoice and Image Detail Sheet for the client.
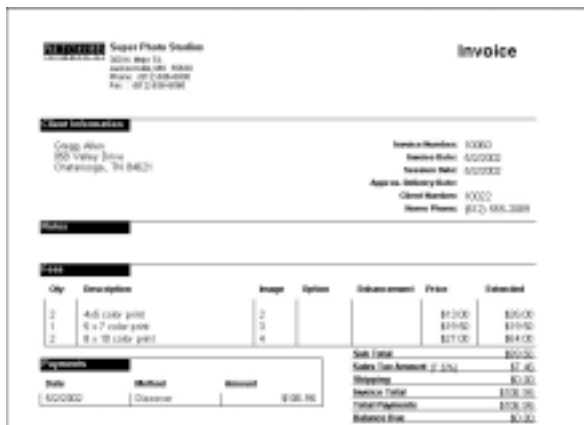
From this point, you can send your customer on their way as the session now moves into production. To make an archive CD of all the images related to this session, open the Session Information Screen and click Action>Make Archive CD. A Production Order can also be created for this invoice, which will allow you to retouch your images, create a CD for the lab, or FTP the files directly to your lab for processing. For further information on working with digital files in Production, see section "Working with Production Orders."

Working With Invoices

Features of the Invoice Information Screen

The Invoice Information Screen is used to store all pertinent invoice information and to display payment information regarding the selected invoice. Invoice information includes invoice number, date, type, sales rep, due date, detailed sales information, payment information, and open balance information. Use this invoice screen to quickly and efficiently generate an invoice to a client while that client is still in your studio or on the phone. Later, after the client leaves or terminates the call, you'll be able to enter a detailed production order, which is needed for the lab or other vendors. This method allows you to invoice the client quickly and to receive payment immediately, if needed, but not make the client wait while all details needed for production are entered. After an invoice has been generated, a payment can be received toward this invoice by clicking on the Payment button on the tool bar. Invoices can easily be turned into a credit memo by changing the invoice type in the invoice header information. Refunds can then be issued off the credit memo. Refunds cannot be issued off an invoice.

Here's a Flash for You!

The Invoice Information screen is a wonderful tool to present images to clients and capture their digital order. Whether you're a film or digital studio, you can utilize these features to enhance your selling process and close additional sales. If you have digital image files of your sessions, acquire them into Portrait One Manager and start showing dynamic, sales effective presentations today. (For information on acquiring your images, see the "Working with Digital Imaging" section.)
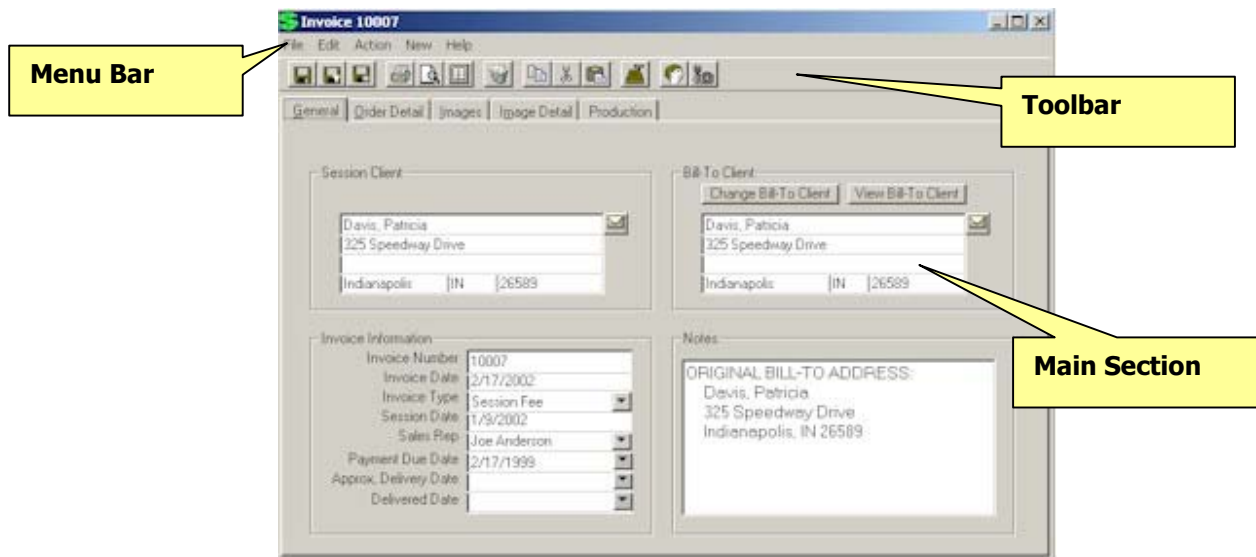
Invoice Information Screen.

1. **Menu Bar.** The Three menu choices are File, Edit and New.

- **File Menu.** From the File menu you can save, delete and print the Invoice records as well as exit the Invoice screen.

1. **Save.** To save the invoice record.
   - You can just save the record by choosing Save
   -Or-
   - You can save the record and close the invoice screen by clicking Save and Close
   -Or-
   - You can save the record and get a blank screen to add another invoice for this session record by clicking Save and New.

2. **Delete.** To delete an invoice record, bring up the record you want deleted and then choose the Delete option from the File menu. Once the invoice has been posted, it cannot be deleted.

3. **Print, Preview, and Export.** Use these features to print, preview, or export an Invoice or Image Detail Sheet

4. **Print Mailing Label.** Use this feature to print a mailing label showing the client's name and address for this client.

5. **Print Account Label.** Use this feature to print an account label showing the client's name, address, phone number, and client number for this client.

Here's a Flash for You!

If you want more options printing a single label, see the Company Preferences, Reports tab, and set the Single Mailing Label to Prompt for Printer.

6. **Print Form Letter.** Use this feature to print a custom form letter or contract specific for this client.

7. **Exit.** To exit the invoice screen choose Exit from the File menu.

- **Edit Menu.** From the Edit menu you can Cut, Copy and Paste selected text to and from the clipboard.

   1. **Cut.** You can cut text by highlighting the text you want to cut and then choosing Cut from the Edit menu.

   2. **Copy.** You can copy text by highlighting the text you want to copy and choosing Copy from the Edit menu.

   3. **Paste.** You can paste previously cut or copied text from a large variety of applications by first cutting or copying the text and then placing your cursor in the desired location in the invoice record and choosing Paste from the Edit menu.

   4. **Delete Line.** Use this feature to delete a detail line from the invoice. Click on the desired line and make sure a yellow circle appears next to the line that you want to delete. Either click Edit $\Rightarrow$ Delete Line, press

Ctrl-D, or click on the yellow circle and click Delete Line from the pop-up menu.

- **Action Menu.** Use the Action Menu to set slide show settings and to start a slide show.

  1. **Change Slide Show Settings.** Use this feature to set your custom settings before starting a slide show.

  2. **Start Slide Show.** Use this feature to start the slide show.

  3. **Stop Music.** Use this feature to stop the music after a slide show has completed.

- **New Menu.** From the New menu you can add a New Payment or Refund.

  1. **New Payment or Refund.** To add a new payment or refund, choose New Payment or Refund from the New menu.

  2. **New Production Order.** Use this feature to create a new Production Order for this Invoice. See the section Working with Production Orders for more information on this feature.

2. **Tool Bar.** The icons are shortcuts to all of the various menu choices. If you place your mouse cursor over the icon and hold it there a text box will pop up (called a tool tip) with the name of the action that is tied to the icon. Simply click on the corresponding icon for the desired action you want to perform.

3. **Main Section.** This is where all of the details of the Invoice are located. Each tab holds corresponding information about the invoice. The main section has five tabs in it.

- **General Tab.** This is where the client specific information, invoice information and notes about the invoice are located.

  1. **Session Client.** This is the client in whose name the session was booked. This field cannot be modified without changing the session.

  2. **Bill-To Client.** This is the name of the person who is to be billed for the session. The default is the same as the session client. However, if you wish to change the bill-to client, click on the "Change Bill-To Client" bar and follow the steps below. Note that a bill-to client MUST be entered in your database.

       a. Select the criteria or field on which you will search for the bill to client. Press tab. *For example, to search by last name, press the down arrow and select "Client-Last Name" from the list.*
       b. Type the selection criteria. Press enter. *For example, to search for clients with the last name Anderson, you would type "Anderson" in this window. To broaden your search criteria, type only part of the selection criteria. For example, typing "And" in this window would give you anyone whose last name BEGAN with "And".*
       c. The clients who match your criteria will be displayed. Select the desired client by double clicking in the box to the left of the client name.

NOTE: You may view the bill to client's information by clicking on the bar labeled "View Bill-To Client".

3. **Invoice information.**

   a. **Invoice Number.** The invoice number is a unique number assigned by Portrait One Manager when the invoice is created and cannot be modified.

   ## Here's a Flash for You!

   An invoice number is created once the invoice is saved. Once a number is assigned, it will not be used again, even if the invoice later deleted.

   b. **Invoice Date.** The invoice date is the date that the invoice was created and is entered by Portrait One Manager.

   c. **Invoice Type.** The invoice type is a description of what the invoice is for. Portrait One Manager allows four different invoice types: Session Fees, Print Order, Estimate, or Credit Memo.

Here's a Flash for You!

What do the different Invoice Types mean?

An invoice for **Session Fees** is used to invoice the customer for the fees pertaining to shooting the Session. When printing the invoice for Session Fees, the Invoice is printed as a **Session Confirmation**, which provides your customer with additional session information such as session date, time, and location.

An invoice for a **Print Order** is where you charge your customer for products that they are purchasing from you. An invoice for a **Print Order** can be converted into a **Production Order** for your lab or other vendors, which can then be tracked through the production phases.

An invoice with an **Estimate** type can be used to provide your customer with an estimate for products. An estimate will not be included in any sales or posting reports. An estimate can later be converted into a **Print Order** simply by changing the Invoice Type

An invoice with a **Credit Memo** type is used to give your customer a credit for any reason, or is also used to correct an invoice that may have been posted in error.

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    d. **Session Date.** The session date is the date of the actual photography session. It is automatically supplied by Portrait One Manager if you are creating the invoice from the Session Information screen AND cannot be modified by the user.   If you are creating a client invoice (not linked to a session), this field is blank.

    e. **Sales Rep.** The sales rep is the individual that created the invoice. You can choose the sales rep from the drop down list.

    f. **Payment Due Date.** The due date is the date that the invoice is due by. You may click on the arrow to select the due date from the calendar, or simply type it in. When typing in the due date, you do not need to enter slashes. For example, 010100 would appear as 01/01/2000.

    g. **Approximate Delivery Date.** This field is optional. Use the down arrow to select the delivery date from the calendar or enter it manually.

    h. **Delivered Date.** This is also an optional field. You may use the calendar or type it in manually. If desired, you may set your invoice posting preferences to post only those invoices that have this date filled in, meaning that the order has been delivered.

4. **Notes.** The note section is a memo field and you can enter any information regarding the invoice that is needed. This field will appear on the invoice print out.

- **Order Detail Tab.** Here is where the items that make up the invoice are located. Also found here is a listing of payments and refunds for this invoice.
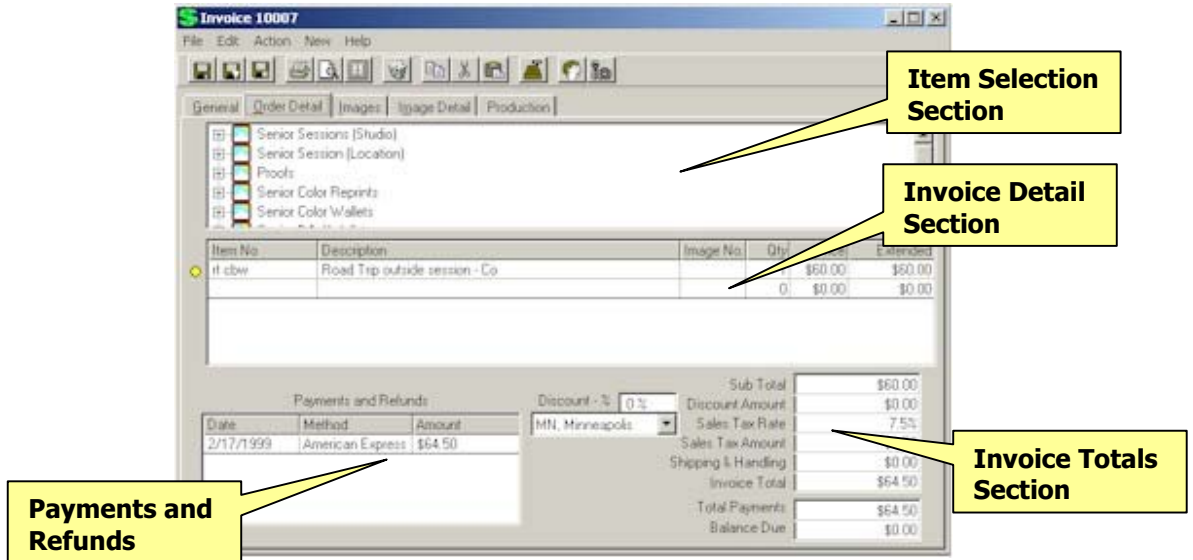
1. **Item Selection Window.** This is a list of all the invoice items available for this session type. If this invoice is not linked to a session, then the items shown are based on the default price list for client invoices setup in the Company Preferences.

Here's a Flash for You!

You create your item lists and prices in the Price List Maintenance section of the program. See the Price List Maintenance section of this manual to learn how to set up items and price lists.

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2. **Invoice Detail.** This section lists the items for which the invoice is billing, a description of the item, the quantity, the unit price and the extended price. Items can be selected in three different ways.

   a. Double-click on the item from Item Selection window

   b. Enter Item Number in Item field, and then press Tab.

   c. Or, enter a special item that has not been predefined in the price list by simply entering a description in the description column, no item number is necessary. A quantity and price can be entered in.

   The yellow dot to the left of the line shows which item is currently selected. To delete a line item, click on the yellow dot (make sure the

dot verifies that the desired line is selected) then click Delete from the pop-up menu. You can also press Ctrl-D to Delete a line.

3. **Payments and Refunds.** This is where you can get a quick glance at the payment history of this particular invoice. The list will include the date the payment or refund was made, the method of payment, and the amount paid. Double click on any payment or refund in this area to bring up the payment screen. (See the Section labeled "Features of the Payment/Refund Screen" for more details.)

> ## *ATTENTION!*
>
> A Payment/Refund CANNOT be modified or deleted after they have been posted. See Company Preferences for more information on posting.

4. **Charges and Totals.** This is where the summary information is located.

   a. **Subtotal.** The subtotal lists the total of all of the items listed in the Invoice Detail section.

   b. **Discount % and Discount Amount**. To discount the entire order by a fixed percentage, enter the percentage (e.g., 10% is entered as 10) in the window to the left of the Discount Amount line. The amount of the discount is automatically calculated and displayed.

   c. **Sale Tax Rate.** The sales tax rate applies the appropriate sales tax to the item based on how the sales tax tables were set up in the Company Preferences. (See "Features of the Company Preferences" section for further details.) Sales tax is not applied to non-taxable items. Sales Tax is applied after the discount is removed from the sub-total.

   d. **Sales Tax Amount.** This is the total tax applied to the items of this invoice. It is automatically calculated by Portrait One Manager. It is recommended that you create an exempt rate of 0% in the tax table for tax-exempt orders.

   e. **Shipping & Handling.** Enter the amount, if any, of the shipping and handling charges.

   f. **Invoice total.** This is the total due for this invoice. It is an automatic calculation.

   g. **Total Payments.** This field will display the amount that has been paid against this invoice. It is automatically updated as additional payments are made.

   h. **Balance Due.** This field shows how much is remaining to be paid against this invoice. It is automatically updated as additional payments are made.

- **Images Tab.** The Images Tab is used to show all the Images related to this session. This tab is a powerful tool to present images to a client and take their order for digital images. See the section on Working with Digital Images for more information on this tab.

- **Image Detail Tab.** The Image Detail Tab is used to show a single image and see all the products ordered for this image. This tab is another tool to present images to a client and take their order for digital images. See the section on Working with Digital Images for more information on this tab.

- **Production Tab.** A list of all the Production Orders related to this Invoice is listed here. See the section on Working with Production Orders for more information on Production Orders.

Features of the Invoice Detail Screen

The Invoice Detail Screen is used to enter further information regarding a single detail line of the invoice. To get to the Invoice Detail Screen, click on the desired invoice detail line, click the yellow dot and then select Invoice Detail from the pop-up menu.

1.   **General Tab**

- **Item Number.** The Item Number for this item is displayed here. The invoice number can also be modified on the screen.

- **Item Description.** The Item Description for this item is displayed here. The invoice description can also be modified on the screen.

- **Image Number.** The Image represents the Image or Frame for this print.

- **Quantity.** The Quantity field represents the number or quantity the customer is purchasing of this one item.

- **Price.** The Price field represents the price the customer is being charged for this item. The Price can be overwritten.

- **Discount.** A Discount can be applied to this single line item. Discounts can either be a flat dollar amount to be subtracted from the item, or a percentage that should be subtracted from the item.

- **Extended.** The Extended is a calculation that cannot be modified. The Extended calculation is the quantity times the price minus the discount.

2.   **Options Tab**

- **Enhancement Level.** For each invoice detail line, you are allowed to choose one Enhancement from a predefined list. An enhancement may be some form of retouching. Depending on the enhancement chosen, the price for this line item will automatically be adjusted. See the Item Maintenance Screen for further information on setting up Enhancements.

- **Option Level.** For each invoice detail line, you are allowed to choose one Option from a predefined list. An option may be a frame and mount option. Depending on the option chosen, the price for this line item will automatically be adjusted. See the Item Maintenance Screen for further information on setting up Options.

- **Composite Number.** Some labs offer composite options for you to sell your customers. Use the composite number field to reference which composite option your client has chosen. See Composite Maintenance in the Price List Maintenance section for further information on setting up Composites.

- **Vendor.** Use this Vendor field to note which vendor or lab from which you are purchasing this item. The vendor will default based on the vendor selected in the Item Maintenance Section.

3.   **Notes Tab**

- **Notes.** Any additional notes regarding this line item can be added here. Examples may include additional cropping instructions.

Add New Invoices

You have three ways to add a new invoice:

1. During the **Scheduling Wizard,** you'll be given the option to create an invoice. Choose Yes if you want to create a new invoice at that time.
2. From a **Session Information Screen,** click New $\Rightarrow$ Invoice
3. From a **Client Information Screen,** click New $\Rightarrow$ Invoice.

Bugged About Something??

Does it matter if I create an invoice from the Session or Client Screens?

YES, IT DOES! An invoice should almost always be created from a Session Screen. The only time you should create an invoice from a Client Screen is if this client is purchasing a product or service from you, but has not completed a session. An example of a Client-based Invoice would be a customer walks in off the street and wants to purchase a frame. When recording a Session-based Invoice, make sure you are creating the invoice from the actual session record this invoice pertains to.

Here's a Flash for You!

Advanced users can choose to disable the Invoice Wizard (See User Preferences section).

Finding Existing Invoices

From a Client Record – Click the Invoices Tab or the Summary Tab and double-click the desired invoice.

From a Session Record – Click the Invoices Tab and double-click the desired invoice.

From the Invoice Browse Screen – Select the Invoice Search Criteria, and the criteria to search for, and press Enter. Click on the desired invoice to highlight it, then double-click on it to open it.

ATTENTION!

Invoices CANNOT be modified or deleted after they have been posted. See Company Preferences for more information on posting.

Deleting Invoices

1. Find the desired invoice to delete as described above and open it.

2. Click File $\Rightarrow$ Delete or click the delete button on the toolbar.

Here's a Flash for You!

Invoices with payment records cannot be deleted. First delete any payment records, then delete the invoice.

Working With Payments and Refunds

Features of the Payment/Refund Information Screen

The Payment Information Screen holds all of the information regarding a particular payment. You can access this screen through the Summary tab on the Client Information Screen, or through the Payment and Refund portion of the Invoice Information Screen. Double-click on the payment or refund for which you'd like information.

Bugged About Something??

What's the difference between a payment and a refund?

A payment is used to record the receiving of money from a customer. A refund is used to record the paying of money back to a customer. Both payments and refunds are entered using the same screen. However, a payment is created from an Invoice and a refund is created from a Credit Memo.

The Payment Information Screen

1. **Menu Bar.** The menu choices are File and Edit.

   - **File Menu.**

      1. **Save.** To save the payment record.
         - You can just save the record by choosing Save, or press Ctrl + S
         -Or-

- You can save the record and close the payment screen by clicking Save and Close, or press Ctrl + W

  -Or-

- You can save the record and get a blank screen to add another payment record by clicking Save and New, or press Ctrl + N.

2. **Delete.** To delete a payment record, bring up the record you want deleted and then choose the Delete option from the File menu, or press Ctrl + D.

3. **Print.** To print a payment record, bring up the record you want to print and then choose Print from the File menu, or press Ctrl + P.

4. **Exit.** To exit the Payment screen, choose Exit from the File menu.

- **Edit Menu.** From the Edit menu you can Cut, Copy and Paste selected text to and from the clipboard.

  1. **Cut.** You can cut text by highlighting the text you want to cut and then choosing Cut from the Edit menu, or press Ctrl + X.

  2. **Copy.** You can copy text by highlighting the text you want to copy and choosing Copy from the Edit menu, or press Ctrl + C.

  3. **Paste.** You can paste previously cut or copied text from a large variety of applications by first cutting or copying the text and then placing your cursor in the desired location in the payment record and choosing Paste from the Edit menu, or press Ctrl + V.

2. **Tool Bar.** The icons are shortcuts to all of the various menu choices If you place your mouse cursor over the icon and hold it there, a text box will pop up (called a tool tip) with the name of the action that is tied to the icon. Simply click on the corresponding icon for the desired action you want to perform.

3. **Detail Section.** This is where the payment or refund information is located (and entered when not using a wizard).

   a. **Invoice Number.** This is the unique number that is assigned by Portrait One Manager to the invoice. The payment or credit memo that you are creating will be applied to this number.

   b. **Refund/Payment Date.** This is the date the payment or refund is applied to the invoice.

   c. **Refundable.** If the payment is refundable click "yes". If the payment is not refundable, continue to the payment/refund method.

   d. **Until Date.** This field only appears if you chose "yes" in the refundable section. This is the date through which the payment may be refunded. After this date, the payment is no longer refundable.

   e. **Payment Method.** Type in the way the payment or refund is being made or choose it from the drop down list box. This list cannot be modified by the user.

f. **Credit Card Number.** Type in the customer's credit card number. This only appears if the transaction method selected is a credit card.

g. **Expiration Date.** Type in the expiration date found on the customer's credit card. This box only appears if the transaction method selected is a credit card.

h. **Customer Name, Address, Zip Code.** These fields are optional, although filling them in usually reduces your bank's charge for processing a credit card through the program PC Authorize.

i. **Authorization Code.** If you are not using PC Authorize, you will not be able to enter information into this field.

Pathways to Success

Increase the efficiency of your staff by using the optional credit card authorization software, PC Authorize. Using this software allows all of your staff to authorize a credit card from any PC by clicking the Authorize button. In addition, you could possibly be charged lower service charges by your credit card provider because of the additional customer name, address, and zip code information that is transmitted during the authorization process.

j. **Check Number.** Type in the number of the customer's check. This only applies if the payment method was by check.

k. **Payment Amount.** Type in the amount that was paid against this invoice, or refunded against this credit memo.

Adding New Payments

Creating a Payment from a Scheduling, Session or Invoice Wizard

When choosing "Create a payment for this session or appointment", you will be brought to the payment information screen. Follow the steps below to create the payment or credit memo. REMEMBER – refunds can only be created from a credit memo.

1. Enter payment method or choose from the drop down box.

2. If this is a credit card, fill in the appropriate information in spaces provided.

3. If this is a check, fill in the check number in space provided.

4. Enter payment/refund amount. Click Next.

5. If you want to modify the invoice, session, or client information, check the appropriate box and click Finish.

Creating a Payment from Invoice Information Screen

1. From the Invoice Browse Screen, find the Invoice for which the payment/refund is to be made. (See the Section labeled "Finding Existing Invoices" for more details.) Double-click on the desired invoice to launch the Invoice Information Screen.

2. In order to create a refund, you must first create a credit memo to go with the original invoice.

3. From the Invoice Information screen, click on the Create New Payment or Refund, or from the New menu choose Create New Payment or Refund.

4. The Payment/Refund Wizard dialog box will appear.

5. If this payment/refund is refundable click the "Yes" radio button. Then enter the Until Date in the field provided.

6. Enter the payment/refund information and click Next.

7. Click Finish and the payment/refund will print, or if you don't want to print the payment/refund at this time, click the check box labeled "Print Receipt" to de-select it and then click Finish.

Finding Existing Payments

Finding Existing Payments from the Client Information Screen

1. From the Client Information screen, click on the Summary tab.

2. Find the payment/refund in the Transaction History section and double-click on it to bring up the Payment/Refund Information screen.

Finding Existing Payments from the Invoice Information Screen

1. From the Invoice Browse screen, find the invoice for this payment/refund. (See the Section labeled "Finding Existing Invoices" for more details.)

2. When you have located the correct invoice, double-click on it to bring up the Invoice Information screen.

3. From the Invoice Information screen, click on the Detail tab.

4. From the Payments and Refunds section (located in the lower left corner) double-click on the payment/refund to bring up the Payment/Refund Information screen.

Deleting Payments

1. Find the payment/refund you want to delete. (See the section labeled "Finding Existing Payments" for more details.)

2. From the Payment/Refund Information screen, click on the File menu and choose Delete, or press Ctrl + D, or click on the Delete icon.

3. You will receive a message asking whether you are sure you want to delete this payment or refund. If you are sure, click "yes". If you aren't sure, click "no".

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Working With Post Session Production Tracking

Post Session Production Tracking Overview

Production Tracking allows you to track the status of the various "jobs" going on within a studio at any time. The Production Browse screen and Production Status reports are great ways to learn the status of any particular order or to get an overview of your studio's performance. It's frighteningly easy to allow an aspect of one of your jobs to slip off your radar screen and end up costing you time, frustration and possibly customer dissatisfaction. Now you can make sure that you're not falling behind, that jobs aren't slipping through the cracks, that you're not missing an important deadline, or that your vendors are delivering timely service.

For digital studios, Production Orders have been designed to greatly assist in the preparation and processing of your digital orders. Features such as links with PhotoShop, create Archive CDs, Create Lab CDs, and FTP Order to lab.

The first step, as defined in this chapter, is to setup the various steps/stages that each of your "jobs" must go through in order to achieve completion.

The following chapters will describe Proof and Production Orders in greater detail.

Portrait One Manager allows you to customize all aspects of your post session production process. Post session procedures are optional and you may use only those that are of benefit to you. The three areas of post session production are:

- Session Status Maintenance
- Proof Order Status Maintenance
- Production Order Status Maintenance

For each area, you must answer this question: "What step or steps do my sessions need to go through?" In each area of post session production, the user must define the steps in the cycle and the amount of time each step takes. Phone call records can be generated for any step as the user desires. Status reports are available for each step in each process.

In addition, Portrait One Manager allows you to create proof and production orders based on your sessions and invoices. This feature is discussed in greater detail in subsequent sections.

> ## Here's a Flash for You!
>
> Here are some important definitions:
>
> **Proof Order Definition:** A Proof Order is used to record film being sent to the lab for processing and proofs being returned to your studio. Proof orders are created from the session record.
>
> **Production Order Definition:** A production order is used to order prints from the lab or other products from your vendors. Where an Invoice is used to record your customer's order with you, Production Orders are used to record the orders you place with your labs/vendors to fulfill your customer's order. A single invoice may contain several production orders according to the number of vendors needed to fulfill the customer's order.

Session Status Maintenance

If you plan to track session status, you'll want to begin by creating your own custom session status cycle. On this screen your studio may create any steps involved in your session status cycle. To get to this screen, you may select Maintenance, List Maintenance from the main menu bar. Or, you may select Maintenance, Preferences, Company Preferences, Miscellaneous tab.

1. **Status List Section.** In this section you may view all the steps in the session status cycle, including the description of the step, the order of the step, how long the step lasts, and whether or not a phone call is required for the step. Portrait One Manager provides you with a sample session status cycle. You may modify or remove any step simply by highlighting it and clicking on Remove or Modify at the bottom of the window.

2. **Status Definition Section.** In this section, the steps of your status are actually defined. To create a new step, click Add. To modify an existing step, highlight that step and click Modify.

   • **Description.** Enter the name of the step you're creating.

   • **Sort Order.** Enter the sequential number (1, 2, 3, 4, etc.) that corresponds to the place this step has in your session status cycle. The steps you define will display based upon the order that you assign them. Do not duplicate numbers in the sort order. However, you may enter the steps in any order, as long as the Sort Order is properly defined.

   • **Typical Duration.** Enter the length of time—in business days—that this step usually takes. This number is used to calculate the due date for the following step. However, it may be overwritten as you change the status of an individual session.

- **Initial/Final Status.** Your session cycle must have one step (and one step only) that you name as the initial status and one step (and one step only), that you name as the final status. Select this status by clicking on the dot in front of it. To change which step is the initial status, simply create or modify the NEW initial status and select the initial status button. If another step had been defined as the initial status, Portrait One Manager will automatically move the initial status to the new step that you've selected. The process works the same for changing whichever step is the final status.

- **Phone call record.** Check this box if a phone call should be associated with this step. Portrait One Manager will automatically create the phone call record for a session when this step is reached. For example, if the client needs to be called when proofs are ready, a phone call record could be generated reminding you to call the client.

- **Call Description.** If the step requires a phone call, enter a call description here. For example, "Proofs available for pick up" might be a good description for a phone call associated with a step called "Session Proofs Ready".

- **Call Type.** Select a call type from the drop down menu. Create and maintain phone call types from the main menu under Maintenance, List Maintenance, and Phone Call Types.

- **User to Call.** Assign the phone call to any employee by choosing that employee from the drop down list.

Once the session cycle is defined, you may track each session you hold on the session information screen as shown below:
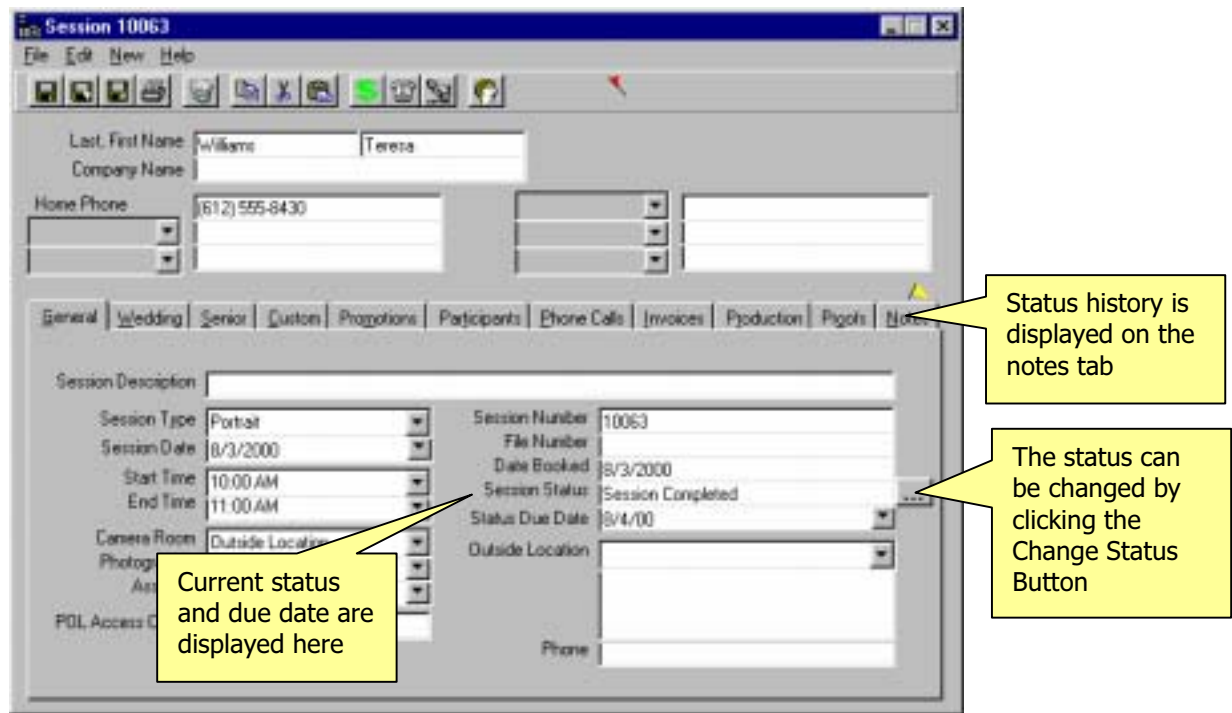
To change session status, click on the button to the right of the session status line. The following screen appears:
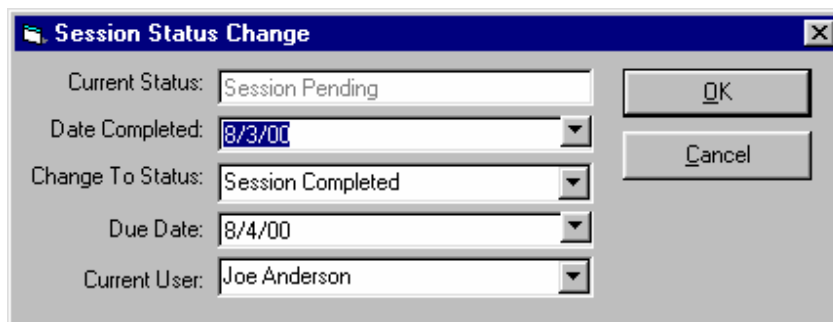
- **Date Completed**. Defaults to the current date. The date completed can be changed if back dating or future dating a change.

- **Change To Status.** Select the desired status from the drop down menu.

- **Due Date.** The due date of the selected status will calculate automatically based on the time cycle defined in Session Status Maintenance. You may overwrite the due date if desired.

- **Current User.** Current user can be changed if someone other than the user currently logged into Portrait One Manager is completing this step.

  A history of all session status changes for the selected session is kept under the Notes tab on the session information screen.

Proof Order Status Maintenance

> ### Here's a Flash for You!
>
> **Proof Order Definition:** A Proof Order is used to record film being sent to the lab for processing and proofs being returned to your studio. Proof orders are created from the session record.

In the same way that you may define a session status cycle, you may also define a cycle for proof orders. This is an optional feature and is not required by Portrait One Manager.

Set up your proof order status cycle on this screen, found under Maintenance, List Maintnenance, Proof Order Status Maintenance (or under Maintenance, Preferences, Company Preferences, Miscellaneous).

4. **Status List Section.** In this section, you may view all the steps in your Proof Order Status cycle, including descriptions of each step, the order of each step, how long each step lasts, and whether or not a phone call is required for the step. You may modify or remove any step simply by highlighting it and clicking on Remove or Modify at the bottom of the window.

5. **Status Definition Section.** In this section, the steps of the status are actually created. To create a new step, click Add. To modify an existing step, highlight that step and click Modify.

- **Description.** Enter the name of the step you're creating.

- **Sort order.** Enter the sequential number (1, 2, 3, 4 etc.) that corresponds to the place this step has in your Proof Order Status Cycle. The steps you define will display based on the order that you assign them here. Do not duplicate numbers in the sort order. However, you may enter the steps in any order, as long as the sort order is properly defined.

- **Typical Duration.** Enter the length of time, in business days, that this step usually takes. This number is used to calculate the due date for the step. However, it may be overwritten as you change the status of an individual proof order.

> ### Here's a Flash for You!
>
> A business day means Monday through Friday, and does not include holidays.

- **Initial/Final Status.**   Your proof order cycle must have one step (and one step only) that you name as the initial status and one step (one step only), that you name as the final status. Select Initial or Final status by clicking on the dot in front of it. To change which step is the initial or the final status, simply assign that status to another step. Portrait One Manager automatically updates all steps.

- **Phone call record.** Check this box if a phone call should be associated with this step. Portrait One Manager will automatically create the phone call record for a proof order when this step is reached. For example, if the client needs to be called when proofs are ready, a phone call record could be generated reminding you to call the client.

- **Call Description.** If the step requires a phone call, enter a call description here. For example, "Proofs available for pick up" might be a good description for a phone call associated with a step called "Proofs Received from Lab".

- **Call Type.** Select a call type from the drop down menu. Create and maintain phone call types from the main menu under Maintenance, List Maintenance, Phone Call Types.

- **User to Call.** Assign the phone call to any employee by choosing that employee from the drop down list.

The status of individual proof orders can be changed in the Proof Order Information screen (see the section titled "Working with Proof Orders" for more information).

The status can be changed by clicking the Change Status Button

Status history is displayed on the Status Logs tab

Current status and due date are displayed here

Production Order Status Maintenance

Here's a Flash for You!

Production Order Definition: A production order is used to order prints from the lab or other products from your vendors. Where an Invoice is used to record your customer's order with you, Production Orders are used to record the orders you place with your labs/vendors to fulfill your customer's order. A single invoice may contain several production orders according to the number of vendors needed to fulfill the customer's order.

Portrait One Manager allows you to create a production order from its associated invoice. Your production cycle may be customized on the Production Status Maintenance screen. You may access this screen from the main Maintenance menu under List Maintenance or from Maintenance, Preferences, Company Preferences under the Miscellaneous tab.

Production Status Maintenance

Description	Order	Dur.	Call?
Production Order Entered In	1	1	No
Production Order Processed	2	1	No
Production Order Sent To Lab	3	10	No
Production Order Received From Lab	4	1	No
Production Order Ready For Pickup	5	5	No
Production Order Picked Up	6	0	No

Status List Section

Description: Production Order Entered In

☐ This status step requires a phone call record.

Sort Order: 1

Call Description:

Typical Duration (Business Days): 1

Call Type:

User To Call:

○ This is the Initial Status.

○ This is the Final Status.

Status Definition Section

Add   Remove   Modify

1. **Cycle Display Section.** In this section, you may view all the steps in your Production Order Status cycle, including descriptions of each step, the order of each step, how long each step lasts, and whether or not a phone call is required for the step. You may modify or remove any step simply by highlighting it and clicking on Remove or Modify at the bottom of the window.

2. **Cycle Definition Section.** The steps of the cycle are actually created in this section. To create a new step, click Add. To modify an existing step, highlight that step and click Modify.

   - **Description.** Enter the name of the step you're creating.

   - **Sort order.** Enter the sequential number (1, 2, 3, 4 etc.) that corresponds to the place this step has in your Production Order Status Cycle. The steps you define will display based on the order that you assign them here. Do not duplicate numbers in the sort order. However, you may enter the steps in any order, as long as the sort order is properly defined.

   - **Typical Duration.** Enter the length of time, in business days, that this step usually takes. This number is used to calculate the due date for the step. However, it may be overwritten as you change the status of an individual production order.
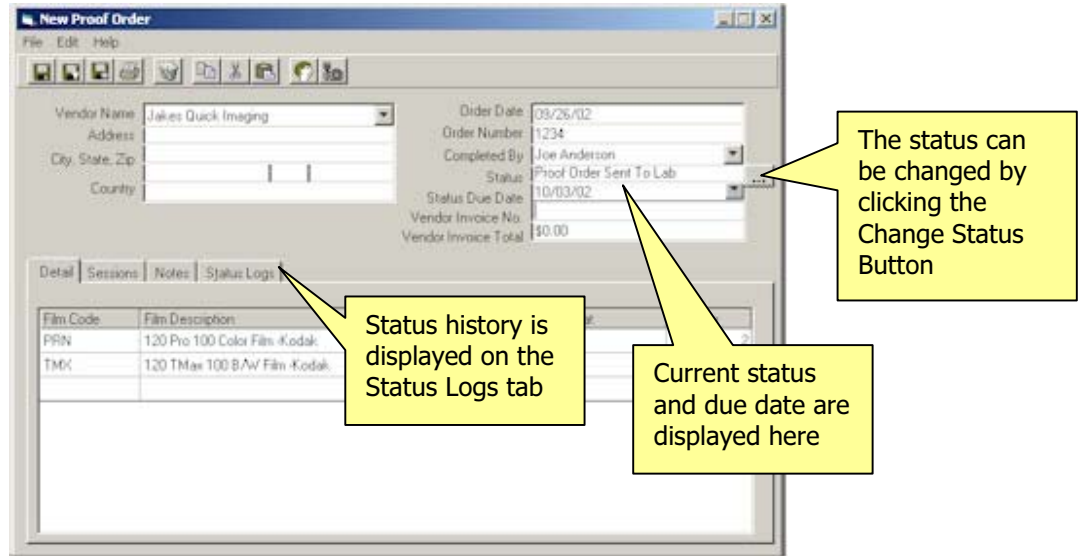
Here's a Flash for You!

A business day means Monday through Friday, and does not include holidays.

- **Initial/Final Status.** Your production order cycle must have one step (and one step only) that you name as the initial status and one step (one step only), that you name as the final status. Select Initial or Final status by clicking on the dot in front of it. To change which step is the initial or final status, simply assign that status to another step. Portrait One Manager automatically updates all steps.

- **Phone call record.** Check this box if a phone call should be associated with this step. Portrait One Manager will automatically create the phone call record for when this step is reached. For example, if the client needs to be called when the order is completed, a phone call record could be generated reminding you to call the client.

- **Call Description.** If the step requires a phone call, enter a call description here.

- **Call Type.** Select a call type from the drop down menu. Create and maintain phone call types from the main menu under Maintenance, List Maintenance, Phone Call Types.

- **User to Call.** Assign the phone call to any employee by choosing that employee from the drop down list.

  Production orders are related to their associated invoice. All status changes are made from that invoice. The history of a production order is held under the Session Information screen, production tab, and also under the Client Information screen, production tab.

The status can be changed by clicking the Change Status Button

Status history is displayed on the Status Logs tab

Current status and due date are displayed here
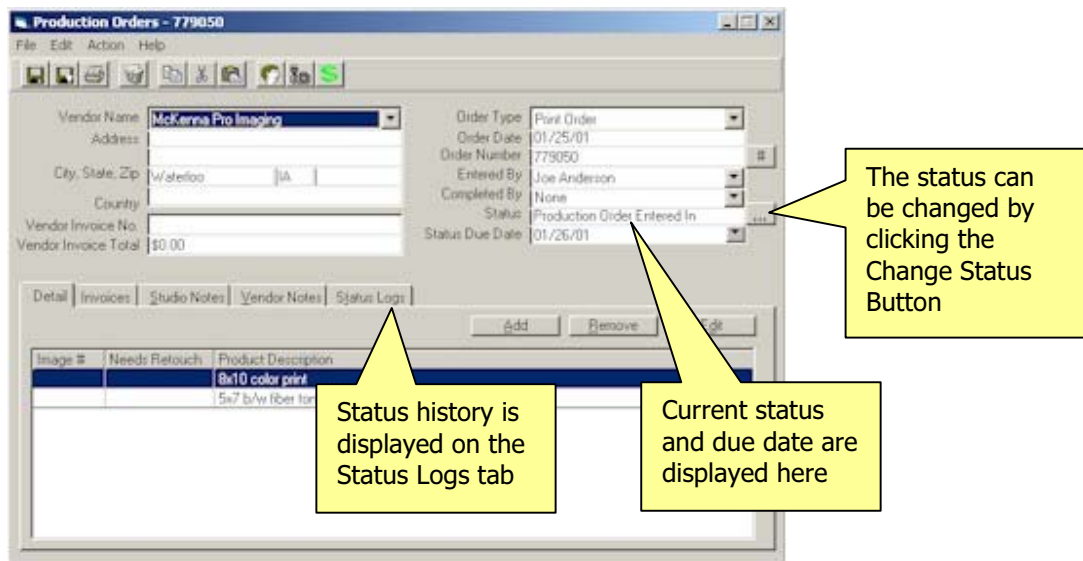
Working With Proof Orders

Features of the Proof Order Information Screen

Here's a Flash for You!

Proof Order Definition: A Proof Order is used to record film being sent to the lab for processing and proofs being returned to your studio. Proof orders are created from the session record.

The Proof Order Information Screen is used to store all pertinent proof order information and to display status information regarding this proof order. Proof Order information includes vendor name and address, order date, order number, who completed the order and the status of the order.

The Proof Order Information Screen

1. **Menu Bar.** The menu choices are File and Edit.

    - **File Menu.**

        1. **Save.** To save the proof record:
            - You can just save the record by choosing Save, or press Ctrl + S
              -Or-
            - You can save the record and close the proof order screen by clicking Save and Close, or press Ctrl + W
              -Or-
            - You can save the record and get a blank screen to add another proof order record by clicking Save and New, or press Ctrl + N.

2. **Delete.** To delete a proof order record, bring up the record you want deleted and then choose the Delete option from the File menu, or press Ctrl + D.

3. **Exit.** To exit the proof order screen, choose Exit from the File menu.

- **Edit Menu.** From the Edit menu you can Cut, Copy and Paste selected text to and from the clipboard.

  1. **Cut.** You can cut text by highlighting the text you want to cut and then choosing Cut from the Edit menu, or press Ctrl + X.

  2. **Copy.** You can copy text by highlighting the text you want to copy and choosing Copy from the Edit menu, or press Ctrl + C.

  3. **Paste.** You can paste previously cut or copied text from a large variety of applications by first cutting or copying the text and then placing your cursor in the desired location in the proof order record and choosing Paste from the Edit menu, or press Ctrl + V.

2. **Tool Bar.** The icons are shortcuts to all of the various menu choices. If you place your mouse cursor over the sicon and hold it, a text box will pop up (called a tool tip) with the name of the action that is tied to the icon. Simply click on the corresponding icon for the desired action you want to perform.

3. **Main Section.** The main section is where the proof order information is located and entered. The proof order information consists of the name of the vendor(s), address, city, state and zip code as well as the vendor's country. Order information is also available, including the order date and number, the person who completed the order and the current status of the order.

- **Vendor Information**. This can be selected from the drop down menu. Vendors are entered and maintained under Maintenance, Vendor Maintenance. See the section on Application Maintenance for additional information.

- **Order Date.** This date is automatically assigned by Portrait One Manager.

- **Order Number.** While Portrait One Manager does not require this field, having an order number makes tracking a proof order much easier. You can use your own numbering system or the order number provided by the lab.

- **Completed By.** This field defaults to the current user, but can be changed by selecting any other user from the drop down menu.

- **Status and Status Due Date.** You may track a proof order by assigning a status from the steps you defined in Proof Order Status Maintenance. To do this, click on the button to the left of the line and select the proper status from the drop down menu. The due date of the step you select is calculated based on the duration you defined for that step. The completed date defaults to today's date, but may be changed if desired. The history of the proof order is kept under the notes tab. You will always be able to see all the steps the particular order went through, along with the date the status was changed.

Proof Order Status Change

Current Status: Proof Order Sent To Lab

Date Completed: 8/10/00

Change To Status: Proof Order Received From Lab

Due Date: 8/11/00

Current User: Joe Anderson

OK | Cancel

- **Vendor Invoice Number and Vendor Invoice Amount.** This field allows the recording of the amount your studio was charged for this proof order and the invoice number from your vendor.

4. **Detail Section.** The detail section is made up of four different tabs. They are the Detail, Sessions, Notes, and Status Logs tabs. On these tabs you will find the film and quantity information, as well as the sessions to which the order is linked and complete date tracking of status information and any pertinent notes for the proof order.

   - **Detail Tab.** The Detail tab is where the film information is kept. You define these film codes, types and descriptions in Maintenance, Preferences, Company Preferences, under the Miscellaneous tab.

     1. **Film Code.** The film code is a unique identifier assigned to a specific type of film.

     2. **Film Description.** The film description identifies the kind of film you are using, such as color or black and white.

     3. **Film Type.** The film type identifies the type of film you are using, such as color negative.

     4. **Film Format.** These formats are supplied by Portrait One Manager and selected from the drop down menu.

     5. **Quantity.** The quantity is how many of a specific film you are using.

   - **Sessions Tab.** Portrait One Manager keeps a record of all the sessions to which this proof order is linked. A proof order may be associated with more than one session. For example, this would be the case if more than one client was photographed on a single roll of film.

   - **Notes Tab.** The notes tab is a memo field where you can enter any notes for this proof order.

   - **Status Logs Tab.** The Status Log is the place where the history of the proof order is stored, showing each step of the proof order cycle and the date it was completed.

Creating a New Proof Order

Remember, a proof order is created from the Session Information screen, New menu.

1. Identify the session for which you wish to create a proof order. Go to the Session Information screen and select New, New Proof Order from the drop down menu.

2. Decide whether this is a new proof order or an addition to an existing proof order. If more than one client is on a roll of film, you'll probably want to add to the proof order until you've accounted for all the sessions on that roll. Or, if you have several rolls of film for several clients, you may want to put them all on one proof order.
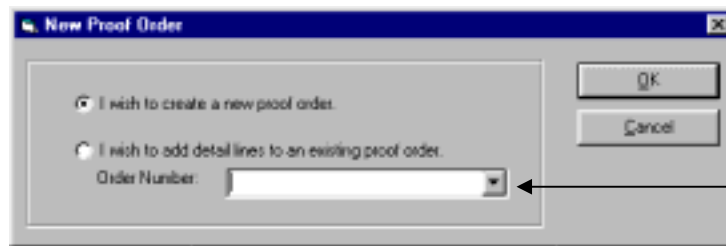
If you're adding lines to an existing order, select that order by clicking the down arrow and highlighting the order.

3. Fill in all the required order information. Remember that you may assign an order number of your own choosing, and this will make retrieving the proof order easier. The proof order status will default to the first step you defined in proof order status maintenance.

4. When you know the vendor's invoice number and the invoice amount, you may enter that information here. This is a reference field only and is not used in financial calculations.

5. Fill in the Detail tab. Click in the box under Film Type and select the film type from the list of films you defined in Maintenance, Preferences, Company Preferences, Miscellaneous. The description will automatically fill in. You may select Film Format from the drop down list provided by Portrait One Manager. Enter the quantity for this type of film.

6. The Sessions tab will be automatically updated to reflect the information on any and all sessions related to this proof order.

7. Enter any additional information under the Notes tab.

8. If you have more orders to create for this session, choose Save and New from the File Menu, or click on the Save and New icon on the toolbar. Otherwise, choose Save or Save and Close.

Finding an Existing Proof Order

There are two ways to find an existing proof order in Portrait One Manager. Once you locate the desired order, you may access it simply by double-clicking on the link.

1. From the Session Browse screen, locate the session related to the proof order, and then look under the Production tab. Make sure that you have the tab set to display proof orders.

2. From the Production Browse screen, locate the proof order and double click on it. You may also search for the proof order by entering the order number in the search box on the upper right and pressing Enter.

Deleting a Proof Order

1. Bring up the Proof Order you wish to delete. (See the topic labeled "Finding an Existing Proof Order" for more details.)

2. From the Proof Order Information Screen, click on the Delete icon or choose Delete from the File menu.

3. If you are sure you want to delete this order, click the Yes button on the Deleting Order Warning box, otherwise click No button.

Changing the Status of a Proof Order

1. Select the proof order you want to change. Refer to the section on "Finding an Existing Proof Order" for more information on how to select the proof order.

2. Click the button next to the Status line. Portrait One Manager will assume you wish to advance to the next status and fill in that information automatically. If another status is desired, simply select it from the drop down menu.

A proof order does not need to move through every status, nor does it need to move through the steps in order. The user controls when status is changed, and the status to which the order is changed.

Working With Production Orders

Features of the Production Order Information Screen

Here's a Flash for You!

Production Order Definition: A production order is used to order prints from the lab or other products from your vendors. Where an Invoice is used to record your customers order with you, Production Orders are used to record the orders you place with your labs/vendors to fulfill your customer's order. A single invoice may contain several production orders according to the number of vendors needed to fulfill the customer's order.

Production orders are created from an associated invoice. When a client orders prints or other products, Production Orders can be generated automatically by Portrait One Manager or entered manually by the user.

The Production Order Information Screen

1. **Menu Bar.** The menu choices are File, Edit and Action.

   - **File Menu.**

     1. **Save.** To save the production order record.
        - You can just save the record by choosing Save, or press Ctrl + S
          -Or-
        - You can save the record and close the production order screen by clicking Save and Close, or press Ctrl + W
          -Or-
        - You can save the record and get a blank screen to add another production order record by clicking Save and New, or press Ctrl + N.

2. **Delete.** To delete a production order record, bring up the record you want deleted and then choose the Delete option from the File menu, or press Ctrl + D.

3. **Print, Preview, Export.** Use these features to print, preview, or export either a Work Order or a Purchase Order. A Work Order is used for your own internal processing of a Production Order, while a Purchase Order is used to send to your vendor/lab for the ordering of prints or other products.

4. **Exit.** To exit the production order screen choose Exit from the File menu.

- **Edit Menu.** From the Edit menu you can Cut, Copy and Paste selected text to and from the clipboard.

    1. **Cut.** You can cut text by highlighting the text you want to cut and then choosing Cut from the Edit menu, or press Ctrl + X.

    2. **Copy.** You can copy text by highlighting the text you want to copy and choosing Copy from the Edit menu, or press Ctrl + C.

    3. **Paste.** You can paste previously cut or copied text from a large variety of applications by first cutting or copying the text and then placing your cursor in the desired location in the production order record and choosing Paste from the Edit menu, or press Ctrl + V.

- **Action.**

    1. **Make Lab CD**. Use this feature to create a CD to send the order to your lab. See the Make a Lab CD section later in this chapter.

    2. **FTP Order to Lab**. Use this feature to FTP an order to your lab over the Internet. See the FTP Order to Lab section later in this chapter.

2. **Tool Bar.** The icons are shortcuts to all of the various menu choices. If you place your mouse cursor over the icon and hold it, a text box will pop up (called a tool tip) with the name of the action that is tied to the icon. Simply click on the corresponding icon for the desired action you want to perform.

3. **Main Section.** The main section is where the production order information is located and entered. The production order information consists of the vendor name, address, city, state and zip as well as the vendor's country. Order information is also available, including the order date and number, the person who completed the order and the current status of the order.

- **Vendor Information**. This can be selected from the drop down menu. Vendors are entered and maintained under Maintenance, Vendor Maintenance. See the section on Application Maintenance for additional information.

- **Order Type**. You can define the order types by clicking Maintenance $\Rightarrow$ List Maintenance $\Rightarrow$ Production Order Types.

- **Order Date.** This date is automatically assigned by Portrait One Manager.

- **Order Number.** While Portrait One Manager does not require this field, having an order number makes tracking a production order much easier. You can use your own numbering system or the order number provided by the lab. Click the # button to have Portrait One Manager automatically assign an Order Number.

- **Completed By.** This field defaults to the current user, but can be changed by selecting any other user from the drop down menu.

- **Status and Status Due Date.** You may track a production order by assigning a status from the steps you defined in Production Order Status Maintenance. To do this, click on the button to the right of the line, and select the proper status from the drop down menu. The due date of the step you select is calculated based on the duration you defined for that step. The completed date defaults to today's date, but may be changed if desired. The history of the production order is kept under the Status Logs tab. You will always be able to see all the steps that a particular order went through, along with the date the status was changed.

4. **Detail Section.** The detail section is made up of five different tabs. They are the Detail, Invoices, Studio Notes, Vendor Notes and Status Logs tabs. On these tabs you will find the film and quantity information as well as the complete date tracking of status information and any pertinent notes for the production order.

- **Detail Tab.** The Detail tab is where a summary of order information is kept. More information about any line on the detail tab is available by clicking the Add button on the detail tab. Highlighting the line and clicking the Edit button will open the Order Detail form for that line.

- **Invoices Tab.** The Invoices tab contains a listing of every invoice related to this production order. A production order can be related to more than one invoice.

- **Studio Notes.** The Studio Notes tab contains notes needed within your studio to process the order.

- **Vendor Notes.** The Vendor Notes tab contains notes that you want sent to your vendor to help them process the order.

- **Status Logs.** The Status Logs tab contains historical information about the various steps this production order has gone through.

Creating a New Production Order

In Portrait One Manager, the production order is created from the invoice used to record the customer's order. A production order can be related to one client, or to several clients, if desired. This depends upon how your studio sends information to your lab.

The steps below outline how to create a new production order. This is done from an invoice, so if needed, please refer to the section on creating an invoice to learn how invoices are generated.

1. Create or access the desired invoice. This can be done from the Client Information Screen under the invoices tab, or from the Invoice Browse Screen, or from the Session Information Screen under the invoices tab.

2. Click on New, New Production Order from the Invoice screen.

3. Fill in the New Production Order Information screen.

- Step 1: Select the vendor for this production order. If you select 'Use all necessary vendors to fulfill this invoice', Portrait One Manager will automatically create a separate Production Order for each vendor that is necessary to fulfill this customer's order.

- Step 2: Decide if this will be a new production order. If you are combining multiple customers' orders into one production order, select the production order you have already started from the drop down menu.

- Step 3: Decide if you want to create the order manually or have Portrait One Manager do it for you. If you ask Portrait One Manager to create the order for you, *only those items assigned to the selected vendor will be added to the production order.* When you create an item, you assign a vendor to that item. Here is where that information is used. You may change the vendor for individual items on specific invoices. See the sections on creating invoices and price list maintenance for more information.

Click OK when you are done with these steps to move to the Production Order screen

4. On the Production Order the vendor information should automatically be completed. The order number usually comes off the bag or envelope provided by the vendor. It is strongly recommended that an order number be used for ease in retrieving the production order at a later time. Fill in any of the other

informational fields as desired. (See the beginning of this section for more information about these fields).

5. The status of the production order will automatically default to the first step in the cycle as you defined it in Production Status Maintenance. (See the section on List Maintenance for more information).

6. If you have asked Portrait One Manager to create the production order for you, or if you are adding to an existing production order, there will be lines appearing on the detail tab. If you will be creating the order manually, the detail tab will be blank.

7. To add a new line, click the new button. To modify an existing line, highlight that line and click on Edit. Either of these actions brings up the order detail screen.

Completing a Production Order Detail Record

If this Production Order has a type of Print Order, as defined in the Production Order Type Maintenance Screen, then you will see the following detail screen. Otherwise, you will see a more basic, generic detail screen.
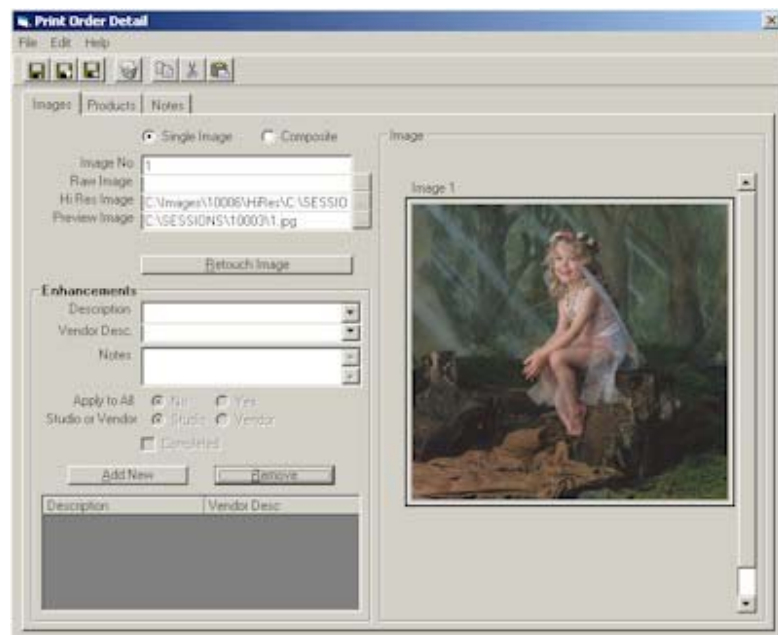
1. **Single Image or Composite.** If this product will contain only one image, select the Single Image option. If this product will contain multiple images, click the Composite option.

2. **Image Number.** Enter an image number associated with this image.

3. **Raw Image Path.** Enter the path to the raw image file associated with this image.

4. **Hi-Res Image Path.** Enter the path to the developed hi-res file associated with this image.

5. **Preview Image Path.**   Enter the path to the preview jpg file associated with this image.

6. **Retouch Image Button.** Click the Retouch Image Button if you want to open the hi-res image in your image editor, like PhotoShop. If you modify the image in any way, you can have Portrait One Manager create a new preview image by right clicking on the right hand image and clicking Make New Preview.

7. **Enhancements.** If this image needs to be enhanced in any way, use the Enhancement list to track these enhancements. Sample enhancements may include Fix stray hair, Remove facial blemish, Make Sepia, or Add logo. Enhancements must be predefined in the Item Enhancement Maintenance List.

    a. **Description**. What do you call this enhancement in your studio?
    b. **Vendor Description**. What does your lab call this enhancement (if the lab is responsible to perform the enhancement)?
    c. **Notes**. Any special notes.
    d. **Apply To All**. Do you want this enhancement to apply to all products related to this image on this order?
    e. **Studio Or Vendor**. Who is responsible to perform this enhancement?
    f. **Completed**. Check this box, once the enhancement has been completed.
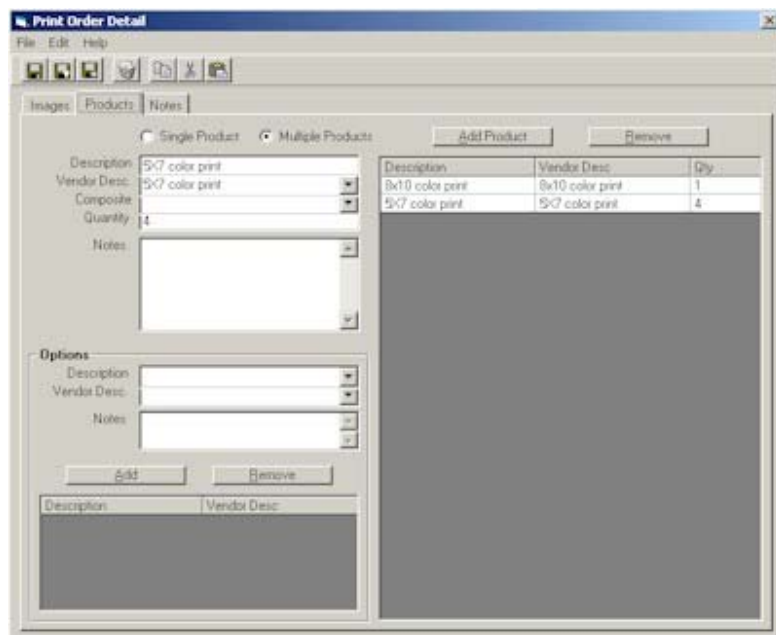
8. **Single Product or Multiple Products.** If you want just one product created from this image, click Single Product. If you want more than one product created from this image, like an 8X10 and a 5X7, then click Multiple Products.

9. **Description.** How do you describe this product within your studio?

10. **Vendor Description.** How does your lab/vendor describe this product?

11. **Composite.** If you are ordering a composite, use this field to select a predefined composite description from a list.

12. **Quantity.** How many of this product do you want to order?

13. **Notes.** Enter any special notes related to this product.

14. **Options.** If you are ordering any special options, like spray or mount options, use the Options List feature. Options must be predefined in the Item Options Maintenance List.

   a. **Description**. What do you call this Option within your studio?
   b. **Vendor Description**. What does your lab call this Option?
   c. **Notes**. Enter any special notes related to this Option.
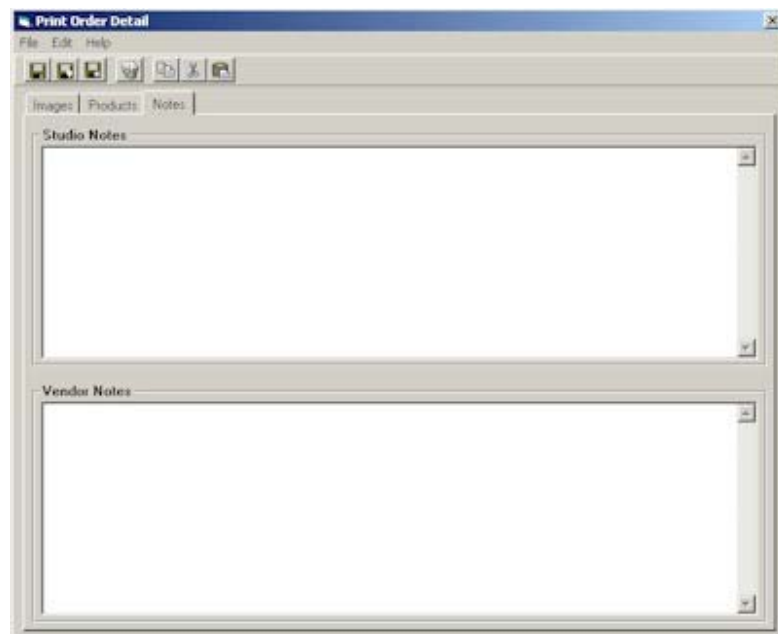
15. **Studio Notes.** Enter any special notes that you need within your studio to produce this product.

16. **Vendor Notes.** Enter any special notes that your lab/vendor may need to produce this product.

Finding an Existing Production Order

There are several ways to find an existing production order.

1. From the Session Information screen, you may go to the Production tab, choose to display production orders, and double-click on the desired order.
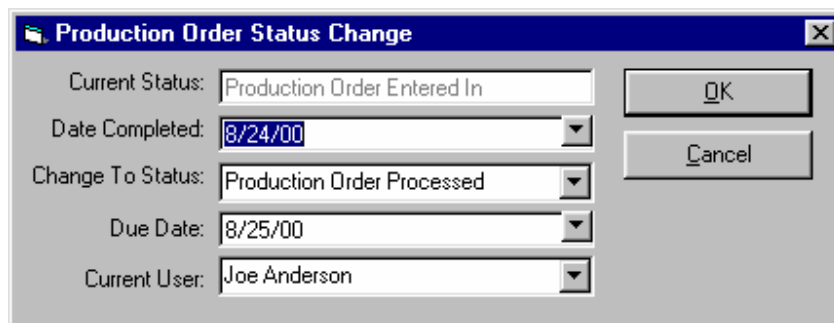
2. From the Client Information screen, you may go to the Production tab, choose to display production orders, and double-click on the desired order.

3. From the Invoice screen, you may go to the Production Tab and double-click on the production order desired.

4. From the Production Browse screen, you may double-click on the production order desired.

Deleting a Production Order

1. Bring up the Production Order you want to delete. (See the topic labeled "Finding an Existing Production Order" for more details.)

2. From the Production Order Information Screen, click on the Delete icon or choose Delete from the File menu.

3. If you are positive that you want to delete this order, click the Yes button on the Deleting Order Warning box, otherwise click No button.

Changing the Status of a Production Order

1. Select the production order whose status you wish to change. Remember that the history for this production order is under the Status Logs tab.

2. Click on the button to the right of the Status line. The window below will appear.

3. Fill in the date the current step was completed. The default is today's date, but you may override it if desired.

4. Portrait One Manager will automatically advance the status to the next step and due date. You may override this if desired.

5. When all boxes are accurately filled in, click OK.

Making a Lab CD

Use this feature to create a CD to send to your lab. To use this feature, you must have a CD-writer installed on your PC, and you must have enabled the CD to be written to using a program like Roxio's Direct CD. To start the process of making a CD, click Action $\Rightarrow$ Make Lab CD to open the Make Lab CD dialog box. Select any additional files to be included on the CD and remove any files from the list that should not be included on the CD. In addition to including all necessary image files, the CD can also contain an Adobe PDF file of the order. Click the Make CD button to make the CD.
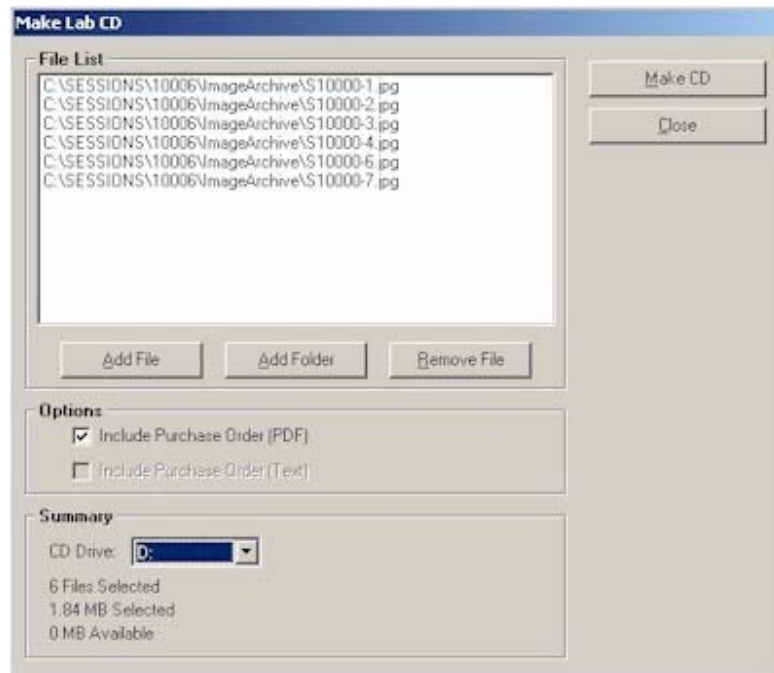
FTP Order to Lab

Use this feature to FTP an order to your lab over the Internet. To setup the FTP process, complete the FTP information on the Vendor Information Screen. To begin the FTP process, click Action ⇒ FTP Order to Lab to open the FTP Order to Lab dialog box. Select any additional files to be included and remove any files from the list that should not be sent. In addition to including all necessary image files, an Adobe PDF file of the order can also be sent to the lab. Make sure you are connected to the Internet and click Start FTP.
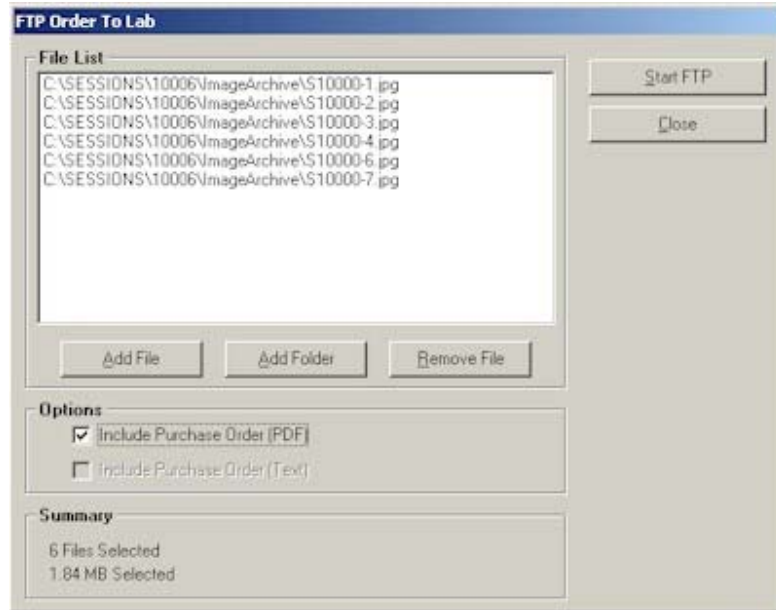
Application Maintenance

Company Preferences

The Company Preferences screen is where you can customize your installation of Portrait One Manager.

1. **Company Tab.** This is where the information about your company is kept. During the installation of Portrait One Manager, you were prompted to enter your company name. What you entered will be defaulted into the field labeled Company Name. This field is not modifiable. If this name needs to be different you will have to reinstall Portrait One Manager using the correct name. You will be able to enter and modify the rest of your company's information. You may also select a company logo by clicking on the Company Logo Bar and linking to an existing graphics file that contains your company's logo. The Studio Number is only used by Portrait One Manager Enterprise users.

Company Preferences Screen – Company Tab

2. **Client Tab.** From the client tab you can set the default phone number types and default area code. You can also modify the family member relationships, client groups and phone number types.

- **Family Member Relationships Button.** Click on this button to add, delete and modify the Family Member Relationships list box. Family Member relationships define the relationship between an individual and the primary client.
- **Client Groups Button.** Client groups are used to help categorize your clients. A client can belong to any number of groups, or need not belong to any. Client groups can be used to generate lists of clients for mailings, phone calls, promotions, etc.
- **Lead Sources Button.** Lead sources help you to track the origin of new clients. Maintain your list of lead sources here, then select the proper lead source when entering a new client record.
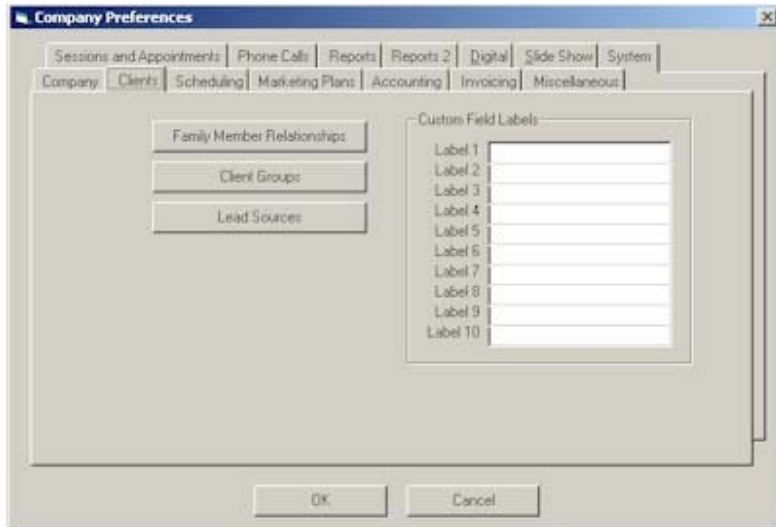
Company Preferences Screen – Clients Tab

3. **Scheduling Tab.** This tab is used to specify special options related to the calendar and scheduling.

- **Appointment Options**. You may select the default color and length of time for an unlinked appointment as it will display on the calendar.
- **Default Locations**. You may also select the default location for both a session and an appointment. Defaults can be overridden at the time a session or appointment is made.
- **Special Event List**. The Special Event List is to record holidays or special events that you want to appear with special headings and/or special open hours on the calendar.
- **Studio Open Hours**. The Studio Open Hours section is used to define the hours your studio is opened. These hours appear in a different color. However, sessions and appointments can be booked during both open and closed hours. If a studio is closed all day long, set both the open and closed time to the same thing.

Company Preferences Screen – Scheduling Tab

4. **Marketing Plans Tab.** Enter any special promotions that your studio conducts through the Marketing Plan Maintenance section. For date sensitive Marketing Plans, such as a birthday reminder, select how far in advance to generate a phone call reminder and which user to assign the phone calls to. As with client groups, clients may be part of any number of marketing plans.
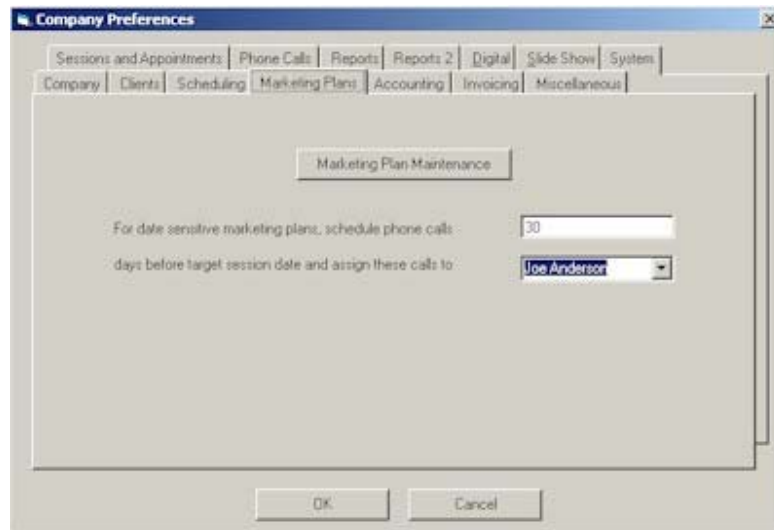
Company Preferences Screen – Marketing Tab

5. **Accounting Tab.** The accounting tab allows you to specify your accounting link options within Portrait One Manager.

- **Accounting Method.** Choose the accounting method you will use. Remember, Invoices and Payments cannot be modified once they are posted.
    a. **Cash Basis 1.** Invoices will be posted as revenue when the balance due is equal to zero.
    b. **Cash Basis 2.** Invoices will be posted as revenue when the balance due is equal to zero AND the product delivery date has been filled in on the invoice.
    c. **Accrual.** Invoices are posted and counted as revenue immediately when they are generated.

- **Accounting Link.** Choose the software package you currently use, and type in the path to the folder that you want accounting files to be exported to (e.g., C:\ My Documents\). Then, when you use the End of Day Posting Procedure to post invoices or deposits, Portrait One Manager exports data to the path you specified, in the proper format, for your accounting software to import.

- **General Ledger Numbers.** This section allows you to set up and modify the default account numbers for your general ledger. The account names may be alphanumeric, but be certain that they match EXACTLY the account numbers or names in your accounting software. The accounts that we will be posting to are Cash, Credit Card Receivables, Customer Deposits, Sales Tax Payable, Shipping & Handling, General Sales and Discounts.
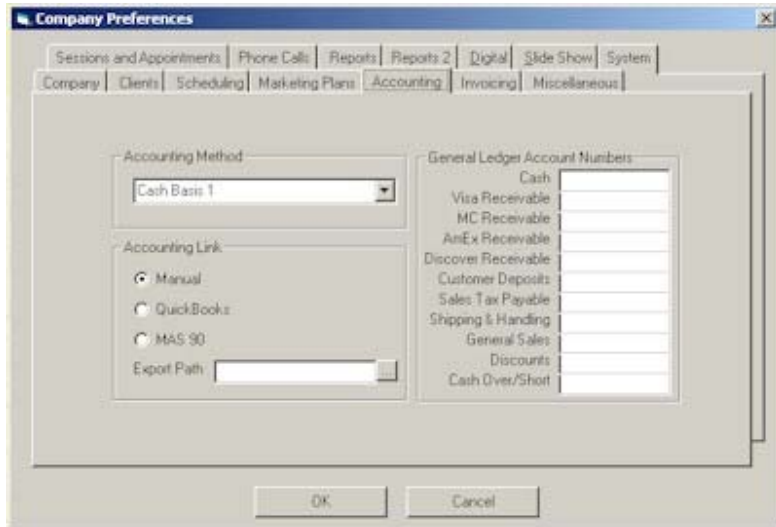
Company Preferences Screen – Accounting Tab

6. **Invoicing Tab.** Set your sales tax and invoicing options here.
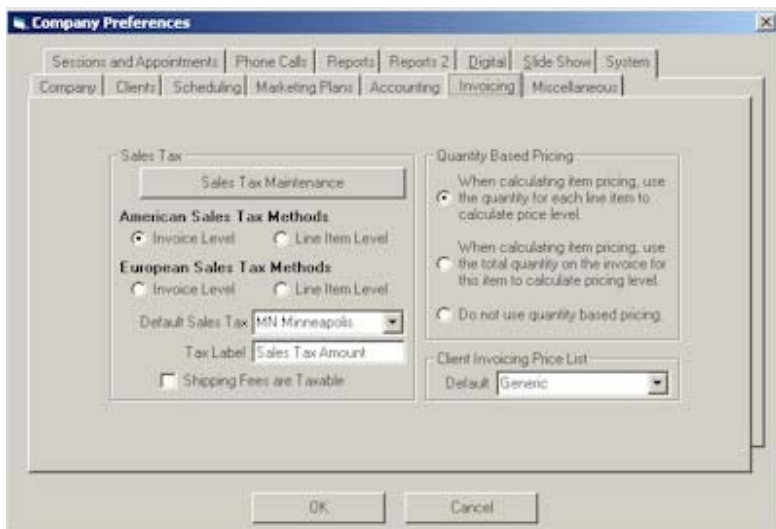
The Company Preferences Screen, Invoicing Tab.

- **Sales Tax.** Clicking on the Sales Tax button will bring up the screen where all sales tax/VAT rates may be entered. To add a new sales tax/VAT rate from the sales tax window, click on Add. Then, enter the state, city, and the sales tax as a percent. For example, 6.5% sales tax would be entered as 6.5. We recommend that you also create a 0% tax line for those sales that are tax exempt. Exit the entry window by clicking on the X at the upper right.

You should then select the default sales tax to be used on an invoice from the list that you created. Simply click on the down arrow and highlight your choice. The default sales tax can be overridden at the time of invoicing. Select either American or European Tax Method. The American method multiplies the invoice total by tax rate to get the tax amount. With the European method, the tax is already built into the price of each item and does not need to be added at the end of the invoice. Finally, select either Invoice Level or Line Item Level. Invoice level calculates the tax on the total of the invoice, where Line Item Level calculates the tax for each line item and then totals the individual tax amounts.

- **Quantity Based Pricing.** Portrait One Manager allows you to set up your pricing structure to offer quantity discounts. Select from the options shown here to determine how Portrait One Manager will calculate quantity discounts. If you select the first option, Portrait One Manager will use the quantity for this line and then look at the pricing levels tab in the Item Maintenance to determine if any discounts should be applied. If you select the second option, Portrait One Manager will total all the lines in this invoice that match this item number and use that quantity to calculate any discounts, again based on the information on the pricing levels tab of the Item Maintenance. If you do not wish to use quantity discounts, select the last option.

- **Client Invoicing Price List.** Most of your Portrait One Manager invoices will be connected to a session, but on occasion you will create an invoice that is not related to a session. This is called a client invoice. You can set the price list that Portrait One Manager will use for that type of invoice here. Use the down arrow to select which of your price lists will be used for this purpose. This option can be changed at any time, but cannot be overridden at the time of invoicing.

7. **Miscellaneous Tab.** Listed below are the options available on this tab.
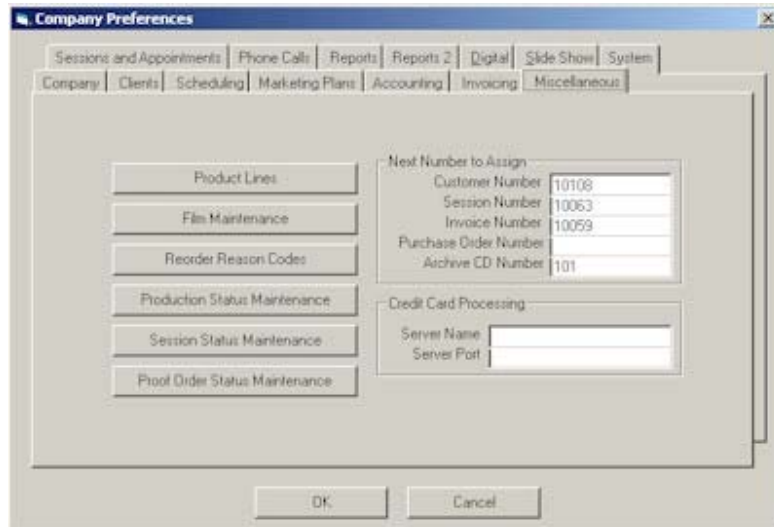
Company Preferences Screen – Miscellaneous Tab

- **Product Lines.** Product lines are selected when setting up sales items in the Item Maintenance Screen. Product lines are used in sales reports to help categorize your sales figures. You should set up your product lines into whatever groups you want to see on your sales reports.

- **Film Type Maintenance.** If your studio uses film, enter all the types you use here. If you want to track cost of sales, enter a cost for that film type. The types you enter here are used in the generating of proof orders.

- **Reorder Reason Codes.** These codes are used in the generation of production re-orders. Add, Delete, or Modify as needed. If the reorder code is not chargeable, be sure to check that box.

- **Production, Proof, and Session Status Maintenance.** See the chapter on 'Working with Post Session Production Tracking' for more information on these sections.

- **When Assigning Negative Numbers.** Select how you will assign negative numbers – sequentially, or using the roll number and frame number. These options affect how your production orders are generated.

- **Next Number to Assign.** You may control the next client number, invoice number, and session number that Portrait One Manager assigns. Numbers are then generated sequentially. Alpha characters are not allowed. You may change this number at any time, however, be careful not to set the number backward so that duplicate numbers will end up being assigned to multiple records.

- **Credit Card Processing.** If you are using the PC Authorize software that is compatible with Portrait One Manager, enter the server name and server port here. If you are not using PC Authorize, leave this blank.

8. **Sessions and Appointments Tab.** Define the default values for your sessions and appointments under this tab.
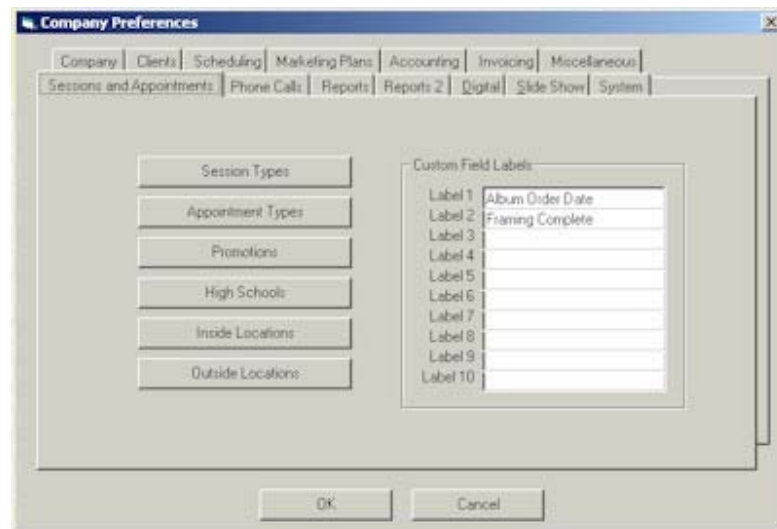
Company Preferences Screen – Sessions and Appointments Tab

- **Custom Field Labels.** Portrait One Manager allows you to define up to 10 custom fields in the session information screen. You may label those fields here. The actual custom fields are located on the session information screen, under the Custom tab.

- **Session Types.** One of the best features of Portrait One Manager is that you may define any number of session types. Session types are then linked to a price list. Session types are defined here, and may also be defined under Price List Maintenance. See the section of this manual on Working with Sessions for more information on how to set session types. Each session type may have a default length and color.

- **Appointment Types.** Like session types, appointment types can have a default length and a unique color on the calendar. Enter all the types of appointments you'll want to schedule on your calendar – from consultations to proof reviews to golf dates!

- **Promotions.** Promotions are used on the session information screen to help you track revenue by type of promotion. Enter all your promotion types here, then select the appropriate promotion when scheduling a session.

- **High Schools.** Create and maintain a list of all the high schools you work with as well as their address and yearbook information. Then, select the proper high school when setting up a senior session.
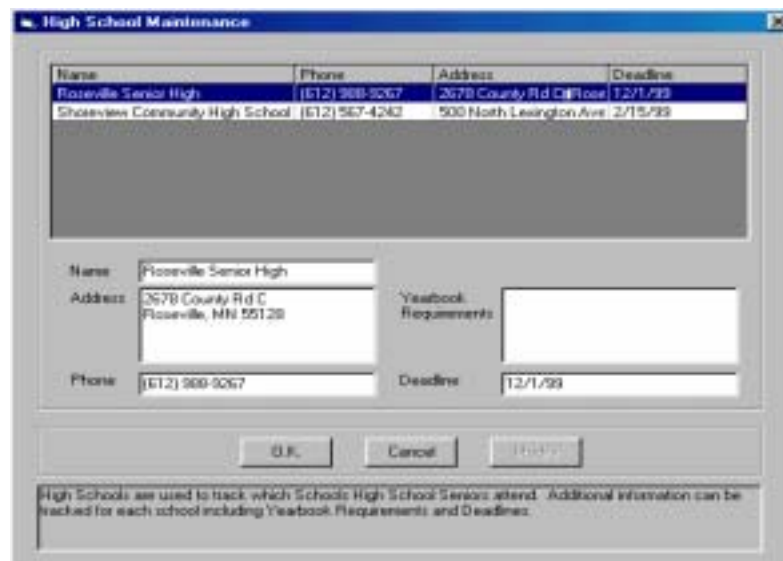
- **Inside Locations.** Create and maintain a list of all the locations within your studio that you'd like to track on the calendar. Portrait One Manager makes sure you never double book a location. Include the address if you'd like it to appear on a session confirmation notice for the client. The default location you choose for a session can be overridden at the time of booking if needed.

- **Outside Location Maintenance.** Just as you maintain inside locations, you can also create a list of commonly used outside locations. Then simply select the location from the drop down list when scheduling a session outside the studio.

9. **Phone Calls Tab.** Enter information related to the types of phone calls your studio makes, as well as the phone numbers you want to obtain for each client.
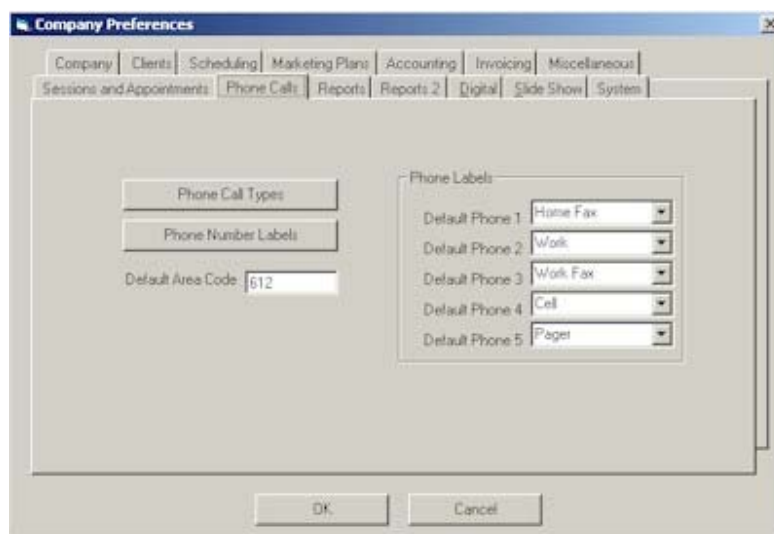
Company Preferences Screen – Phone Calls Tab

- **Phone Call Types.** Click on this button to create a list of all the types of phone calls your studio makes. Add, Delete, or Modify these types as needed. Then, select them from the drop down menu when creating phone call records.

- **Phone Labels.** You may create any number of phone call labels by clicking on this button. Then, you may select which of these labels will be the default for the phone number fields in a client record. Setting or changing the defaults affects clients created AFTER the change is made. Labels in existing client records are not affected.

- **Default Area Code.** Enter the default area code by clicking in the proper field and then typing it in. This area code will automatically be included when you enter client phone numbers. This is usually the area code your company resides in, or the area you will call the most.

10. **Reports Tab.** On the reports tab you can set all your printing options for Portrait One Manager, by report type.
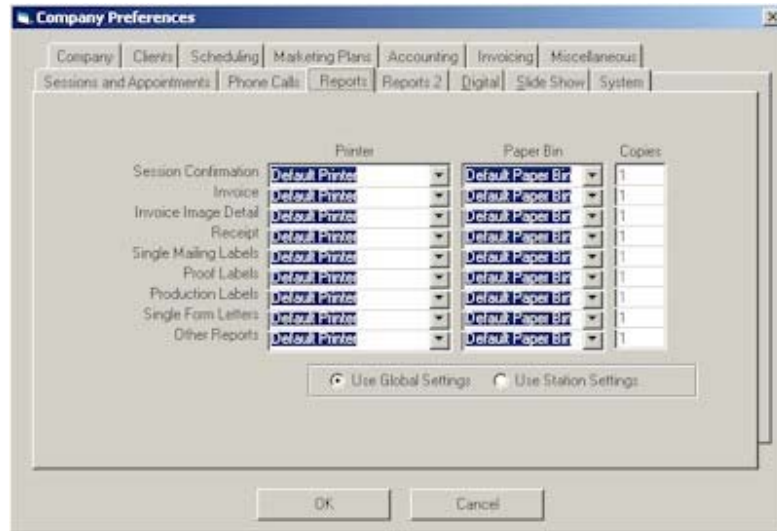
Company Preferences Screen – Reports Tab

- **Printer.** Choose Default Printer to use the printer you have selected in Windows. Choose Prompt for Printer if you would like to select the printer or number of copies each time you print a report. All printers you have defined in your Windows setup will be available for selection here.

  Selecting Prompt for Printer for a Single Mailing Label not only gives you the option of choosing the printer, it will allow you to define the starting label position on a sheet of laser labels so there's no waste.

- **Paper Bin.** You may choose the Default Paper Bin set up in Windows, or one of the other options here. Default Paper Bin works in most cases. If you are using a dot matrix printer, select Tractor Feed from the menu. You may also select Manual Feed.

- **Number of Copies.** Choose the number of copies that you want to print each time you generate a report. Remember, choose Prompt for Printer as your printer option if you want to specify a number of copies each time you print.

- **Global or Station Settings.** All workstations that use Global Print Settings use the same setting. Workstations using Stations Settings have settings strictly for that workstations only.

11. **Reports 2 Tab.** On the reports tab you can set more printing options for Portrait One Manager.

   - **Report Header.** Whatever you enter into the Report Header Section will appear on the top of each report under your company name.

   - **Profit Analysis Report.** For the Profit Analysis Report, Portrait One Manager gives you several options to determine how it should calculate the total cost of each session. First, should it include any film costs, based on the kind and number of rolls of film you enter in the Proof Order? Second, should it include any proofing costs, determined by the invoice total amount you enter on each Proof Order? Thirdly, should it include Product Costs? If so, you have two options to calculate the product costs. Using Item Maintenance Costs will pull the cost for each item on an invoice from the Costs tab of the Item Maintenance screen. Using Production Order Costs will pull the cost from the Invoice Total field that you fill in on each Production Order. The first option requires more up front setup but is then calculated manually. The second option requires you to input the figure manually that you receive from your vendors' invoices, but should be more accurate than the first method.
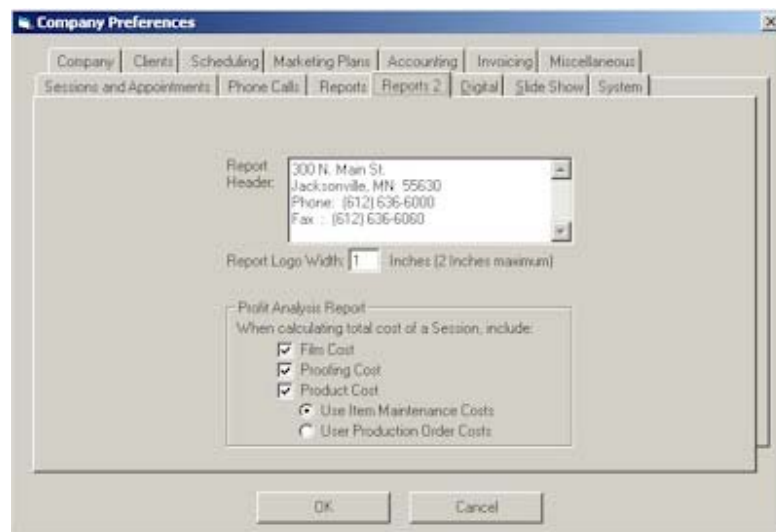
Company Preferences Screen – Reports 2 Tab

12. **Digital Tab.** The digital tab is used to setup digital imaging features in Portrait One Manager. See the section 'Working with Digital Imaging' for further information on this tab.
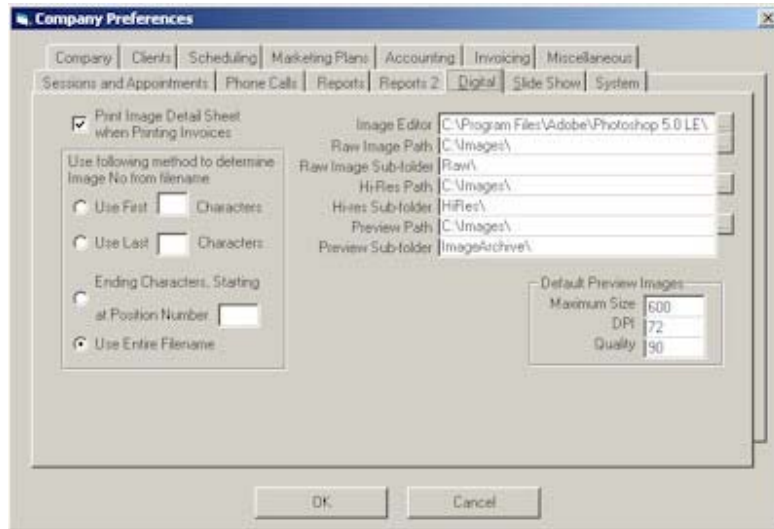
Company Preferences Screen – Digital Tab

13. **Slide Show Tab.** The Slide Show Tab allows you to set the defaults for your next slide show. See the 'Working With Digital Imaging' section for further information on this tab.
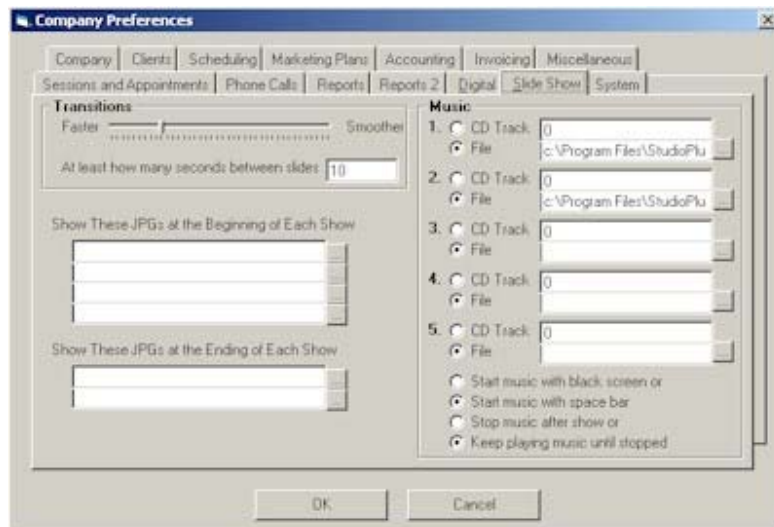
Company Preferences Screen – Slide Show Tab

14. **System Tab.** These settings should only be changed under the direction of a Technical Support Specialist. Make sure you restart Portrait One Manager after changing any of these settings.
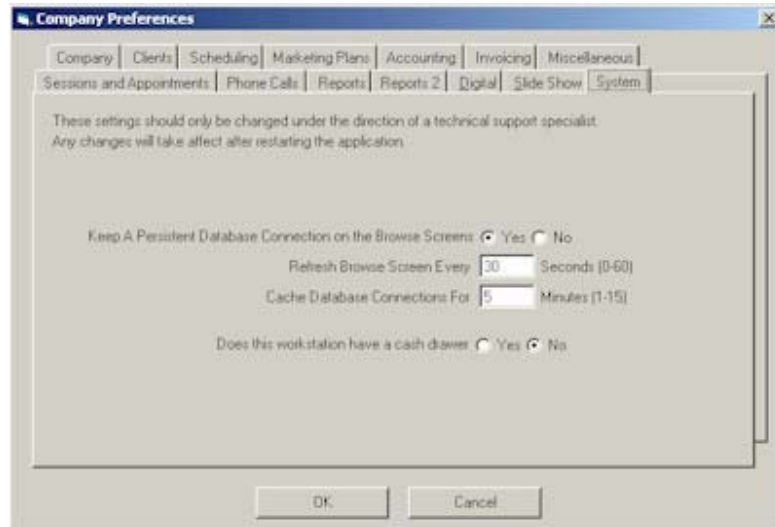
Company Preferences Screen – System Tab

- **Keep Database Persistence.** Setting this option to yes forces Portrait One Manager to keep a permanent connection to the Database as long as Portrait One Manager is Open. Setting this option to No, forces Portrait One Manager to disconnect from the database whenever possible. This option will slow performance, but may improve reliability.

- **Browse Refresh.** This setting determines how often Portrait One Manager should refresh the Browse Screens so changes that other machines make to data records will be automatically reflected on the other computers.

- **Database Cache.** This setting determines how long a database connection should be cached in memory before it is released. Once it is released, a new one will have to be created if it is needed.

- **Cash Drawer.** If an APG cash drawer is connected to this workstation, set this setting to yes.

User Preferences

The User Preferences screen is used to set the defaults of how Portrait One Manager looks and works for the individual user.

The User Preferences Screen – Options Tab

- **Options Tab.**

    1. **Calendar.** The calendar section of the options tab is where you set the time increments to be displayed in the calendar browse screen. If you were to choose 30 Minutes you would only have two lines per hour representing the Hour and half-hour on the calendar browse screen. The calendar browse screen is defaulted to 15-minute intervals.

    2. **Wizard.** The wizard section allows you to choose which, if any, of the wizards you want to use. All wizards are active by default. To make a wizard inactive simply click on the check box next to it.
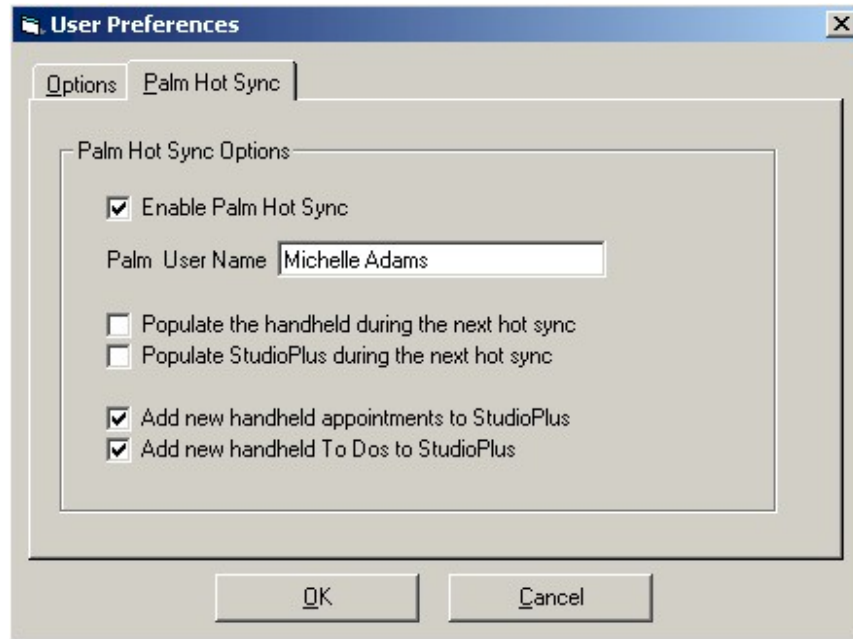
The User Preferences Screen – Palm Hot Sync Tab

- **Palm Hot Sync Tab.**

  To synchronize this users schedule and to-dos with a Palm handheld device, click the first box. Enter the User Name exactly as it appears in the Hot Sync program. Populate the handheld during the next hot sync will force all Portrait One Manager calendar events and to-dos to be copied from Portrait One Manager to the handheld. Populate Portrait One Manager during the next hot sync will force all existing calendar events and to-dos to be copied from the handheld to Portrait One Manager. If you don't want any new handheld appointments to be added to Portrait One Manager, then uncheck the second to last checkbox. If you don't want any new handheld to-dos to be added to Portrait One Manager, then uncheck the last checkbox.

Add & Remove Users

1. From the Menu Bar, choose <u>M</u>aintenance, <u>U</u>sers & Security. This will bring up the Add/Remove Users Dialog box.

2. To add a user, click on the Add button. Type the new user's initials and name into the appropriate fields. Type them as you want them to appear. Select one or more check boxes to define the type of user. Enter a Sort Order to determine the order this person should appear on any user lists. Click O.K.

3. To remove a user, first highlight the user you want to remove, then click the Remove button. A message will appear asking if you are sure you want to remove the user. If you're sure, click "Yes". If you aren't sure, click "No".

4. To copy a user, first highlight the user you want to copy, then click the copy button. Type the new user's initials and name into the appropriate fields. Type them as you want them to appear. Click O.K. This option is helpful if you want to create a new user that has the same security clearances as an existing user.

5. To clear or reset a user password, first highlight the user and then click the Clear Password button. A message will appear asking if you want to clear the password for the user. If you do, click the Yes button. If you don't, click the No button.

Modify Security Levels

The User Permissions Screen is where you will set the different security levels for individual or multiple users of Portrait One Manager.

The User Permissions Screen.

There are three primary sections to the User Preferences screen. They are; the User List, the Security Feature List and the Security Options section.

- **User List.** The user list is where you will choose the user or users whose security you want to modify.

- **Feature List.** The feature list is where you choose the options within Portrait One Manager for which you want to set the user's security.

  1. **Invoices & Payments.** Invoices & Payments controls the user's access to create, modify or delete invoices and payments.

  2. **Lists.** The Lists option controls the user's ability to modify the pull down menus.

  3. **Preferences.** The preferences option controls the access to company wide preferences.

  4. **Users & Security.** The users & security option controls the access to adding new users and setting user permission levels.

  5. **Reports.** The reports option controls access to printing statistical reports.

  6. **Word Merges.** The word merges options controls access to creating and printing word merge documents.

  7. **Utilities.** The Utilities option controls the access to the utilities menu.

- **Security Options.** The security options section is where you will set the access level of the program list option for the users.

To modify security for a user or multiple users, follow the steps below.

1. Highlight the user or users you want to modify by clicking on their name(s). You can set the security for multiple users by highlighting more than one user at a time. To highlight multiple users, click on a user and hold the control key and click on each of the rest of the desired users. To highlight a range of users, click on a user and then hold the shift key and click on the last users you want in the range. All of the users in between will also be highlighted.

2. In the feature list, click on the option on which you want to set the security.

3. In the security options section select No Access if you don't want the user to be able to edit the option in any way. Select Full Access if you want the user to have no restrictions on the use of the option.

4. Repeat these steps until all security settings have been made.

Maintenance List Menu

All of the items listed in the Maintenance List Menu can be found in the Company Preferences, with the exception of Price List Maintenance. See the Company Preferences section earlier in this chapter for more information on these items.
.

Price List Maintenance

In order to properly invoice clients for session fees, print orders, packages or any other item your studio sells, you must create price lists in price list maintenance. Each price list is linked to a session type that you define. You may have as many session types and price lists as you choose. For example, you may have several different types of senior sessions – Senior Yearbook, Senior Sports, Senior Other. All of these sessions might be linked to the same price list – the senior price list. On that price list would be all the session fees and item prices for products relating to any senior session. When an invoice is generated from a session, only the items on the price list assigned to that session are available for invoicing. *More information about creating session types is found in the Company Preferences section of this manual.*

Bugged About Something??

Why use multiple Price Lists?

You should choose to use multiple price lists only if you charge different prices for the same product for different types of sessions. For example, if you charge one price for an 8X10 for a family session and a different price for the same 8X10 for a wedding, then you would want to use multiple price lists.

Bugged About Something??

Why use multiple Session Types?

You should choose to use multiple session types if you would like to track session trend information on reports. For example, if you would like to know how many Premier Weddings you have done this year, and how many you have done compared to last year, then you will want to use session types to track this information. Another benefit of using multiple session types is that you can define a default length for each type of session and a different color to display the session on the calendar screen. You must use multiple session types if you want to use multiple price lists.

The Price List Maintenance screens are accessed from the main Portrait One Manager Menu under Maintenance, List Maintenance. There are two main parts to Price List Maintenance: the Price List screen and the Item Maintenance detail screen.

Price Lists

All the products your studio sells will be entered into price lists through this screen. You will then link every type of session your studio does to the proper price list. When you create a new price list, Portrait One Manager automatically creates item categories in that price list. The categories are Session Fees, Portraits, Packages, Composites, and Miscellaneous. In the example below, there are four price lists: Portrait, Wedding, Senior, and Generic.

The Price List Screen

The three main sections of the Price List screen are the Menu Bar, Tool Bar and the Browse Screen.

- **Menu Bar.** Options available include File, Edit, Maintenance, and Help.

  1. **File.** From this menu you can create a new price list, item group, or item as well as delete any existing price list, item group, or item. These options are also represented on the tool bar as icons.

  2. **Edit.** The edit menu allows you to edit any price list name, item group name, or item detail simply by highlighting and selecting Edit from the edit menu. You may also copy any price list and all its items. This option is helpful when creating price lists that have a great deal of similarity. You may copy an entire price list and then simply rename and edit it as needed using the edit option.

  3. **Maintenance.** Here you can create and maintain lists of:

a. **Session Types:** To assist in organizing all the types of sessions you do, you may create your own session types. For example, you might have different types of wedding coverage: Standard, Royal, Deluxe, etc. Each wedding coverage could be created as a session type. You may have as many session types as you find helpful. Remember, each session type is linked to a price list for invoicing purposes, and only items on the price list you've selected will be available for invoicing. *Note: Session types can also be maintained under Maintenance ⇒ Preferences⇒ Company Preferences ⇒Sessions and Appointments. See the section titled "Features of the Company Preferences Screen" for additional information.*

b. **Product Lines:** Use product lines to categorize your products for reporting purposes only. For example, if you wish to see your sales for the year, but don't want to see too much detail, use product lines to group your sales information. Some examples might include Color Prints, Session Fees, Frames and Folios, and Black and White Prints. Product Lines are optional.

c. **Options:** As you create an item, you may add optional upgrades to the base price of the item. For example, you might add a location fee to the basic price of a session. Or, you might add a clothing change fee to the cost of a senior session. While you may create any number of options for an item, you may only select ONE of those options when invoicing.

d. **Enhancements:** Like options, enhancements are added to the base price of an item. For example, you may add a basic retouch fee to the price of an item, or colorization to a black and white portrait. You may create any number of enhancements for an item, but you may select only ONE enhancement when invoicing.

e. **Composite Layouts:** You may enter the composite layouts available from your lab or labs here and then, during invoicing, select them from a drop down menu to make invoicing quicker.

- **Tool Bar.** The tool bar has icons to add a new price list, group, or item; edit an item or group and delete an item, group or price list.

  1. **New Price List.** Use this icon to add a new price list. Portrait One Manager will automatically add the item categories of Session Fees, Portraits, Packages, Composites, and Miscellaneous as part of the newly created price list.

  2. **New Group.** Use this icon to add an item group to one of the categories that Portrait One Manager has created for you, such as color prints.

  3. **New Item.** Use this icon to add an item to an existing item group. It is here that you actually enter pricing information about the item. This will be examined more completely in the next section.

  4. **Edit Item.** Click on any existing item to edit its associated pricing information. Double-clicking on the item will also allow you to edit the item.

  5. **Delete Item, Item Group, or Price List.** Use this icon to delete an existing item group or session type. First click on the item or group you want to delete and then click on the Delete icon. All information associated with the selected item will be deleted. For example, deleting

a group causes all associated items in that group to be deleted. Deleting a price list causes all associated groups and items to be deleted.
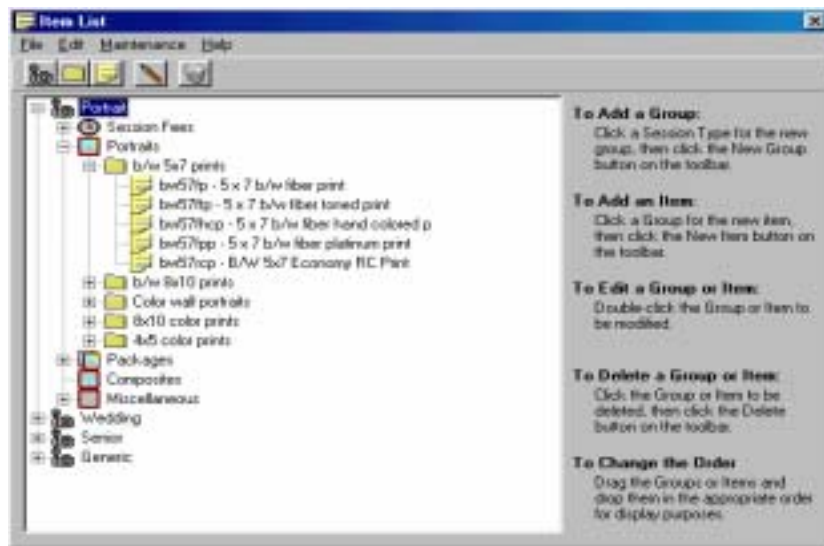
Expanded View of the Price List Browse Screen

- **Detail Screen.** The Detail Screen shows all of the different Price Lists, Categories, Groups, and Items that you have set up in Portrait One Manager. Structuring Price Lists and Groups carefully allows you to have all your items grouped in a way that is easy to understand – keeping all items of one type together.

    a. **Price Lists and Categories.** You create price lists based on the main categories of items that your studio sells. In the screen above, Portrait, Wedding, Senior, and Generic are all user defined price lists. The user can create and name any number of price lists. Each price list is linked to a user-defined session type.

    Each price list is further broken down into five categories: Session Fees, Portraits, Packages, Composites and Miscellaneous. These categories are always assigned by Portrait One Manager to each price list you create and cannot be modified. However, you do not have to have items in each category.

    b. **Item Groups.**   A group is simply a cluster of several related items. In the example above, "b/w 5x7 prints" and "b/w 8x10 prints" are two of the groups for the Portrait category on the Portrait Price List. You must place items into groups within a price list.

    To add a group, select the item category to which you desire to add the group by clicking on the plus sign in front of the category. In the example above, the group "b/w 5x7 prints" was added by first clicking on the plus sign in front of the Portrait price list, then clicking on the plus sign in front of the category "Portraits" and then clicking on the Add Group Icon.

    c. **Items.** This is where you actually enter pricing for each item. First click on the group to which you want to add the item and then click on the New Item Icon. In the example above, "bw57fp" and "bw57ftp" are

items that are under the group "b/w 5x7 prints". See the next section, Individual Item Maintenance, for more detailed information of items.

Individual Item Maintenance

Here's a Flash for You!

Hey, don't be alarmed by the amount of information required on these tabs. Only four categories actually must be completed:
♦ Item Identifier
♦ Description
♦ Non-taxable
♦ Base Price

The Item Maintenance Screen holds the details of the individual retail items sold by your company. Many of the tabs and fields in Item Maintenance are optional; however, the more you use them, the greater your flexibility in invoicing.

The Item Maintenance Screen

1. **Menu Bar.** The menu choices are File (Save, Save and Close, Delete, and Exit) and Edit (Cut, Copy, and Paste).

2. **Tool Bar.** The icons are shortcuts to all of the various menu choices. From left to right the icons are; Save, Save and Close, Delete, Copy, Cut and Paste. If you place your mouse cursor over the icon and hold it, a text box will pop up (called a tool tip) with the name of the action that is tied to the icon. Simply click on the corresponding icon for the desired action you want to perform.

3. **Detail Section: General Tab.** This is where basic item information is located and entered.

a. **Item Identifier.** The user assigns the Item Identifier. Item Identifiers can be any combination of letters and numbers up to 12 digits in length. The Item Identifier must be unique within this price list, but may be used again in other Price Lists. **(Optional, but recommended)**

b. **Description.** Description tells you what the item is. This description will appear on the customer invoice. **(Required)**

c. **Lab Description.** Select the proper lab description from the options available by clicking on the down arrow. The drop down list is controlled by Portrait One Manager and is not modifiable. However, you may type in a description that is not shown on the available list. **(Optional)**

d. **Crop Ratio.** Enter the crop ratio commonly used for this item. **(Optional)**

e. **Preferred Vendor.** Select the vendor from whom you most often purchase this product. The vendor list is maintained by you on the main menu under Maintenance, Preferences, Vendor Maintenance. **(Optional)**

f. **Product Line.** Product Lines are used to group items that are of a similar type. Sales reports are grouped by Product Line, so it's extremely important to create product lines that will group sales items in the way you want them to be reported. Product lines are created in Maintenance, Preferences, Company Preferences, under the Miscellaneous tab. **(Optional)**

g. **GL Sales Account.** You may select the specific GL account to which you want sales of each item to be posted. If this is left blank, sales will post to the default sales account listed in Company Preferences under General Sales. If an accounting link is chosen, data will export to the sales account number listed here; otherwise, the account number merely prints on all posting reports. **(Optional)**

h. **Non-Taxable Check Box.** Check this box if the item is always non-taxable. **(Optional)**

4. **Detail Section: Pricing Levels Tab.** This tab allows you to define quantity discounts for the item. For example, if the price of a print drops when more than 5 are purchased, that information would be entered here, eliminating the need to always watch for quantity discounts when invoicing.
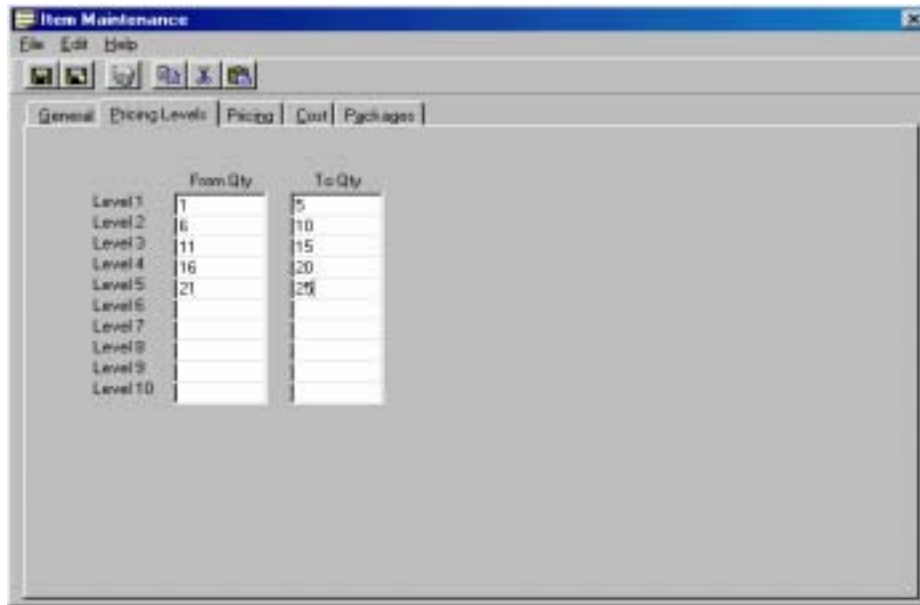
5. **Detail Section: Pricing Tab.** Pricing information, the amount you charge your customers, for all pricing levels is entered on this tab. The Base Price for the item is entered first, followed by any options or enhancements that are available for this item. The lower half of this screen displays the pricing structure for the item as you have defined it.

   To bring any item into the data entry area, just click on its description on the left side of the screen. Once a line is in the data entry area, it can be modified or removed. Enter a price for each level that you have created under the Pricing Levels tab. If you have only one pricing level, you only need to enter a price in the box labeled "Level 1".
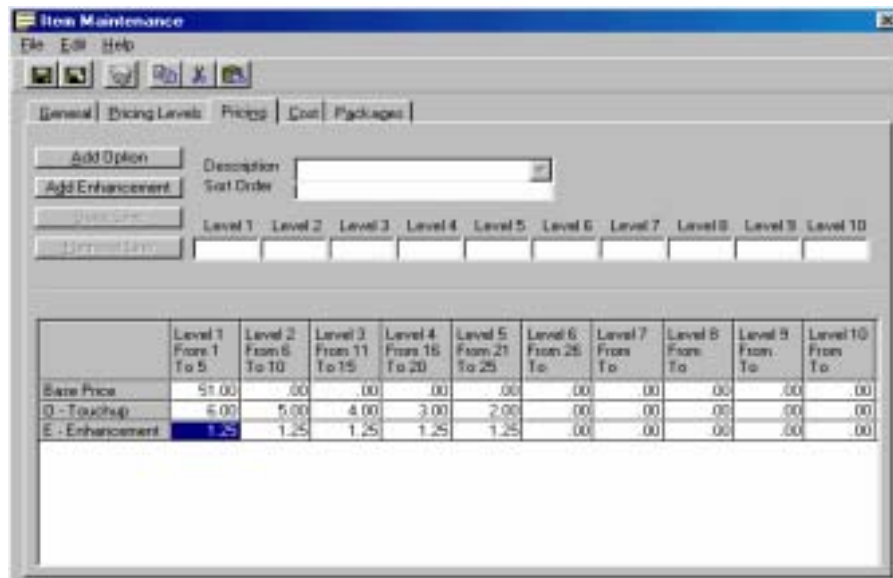
Bugged About Something??

How is pricing calculated when using options and enhancements?

At the time of invoicing, you are allowed to choose one predefined option and one predefined enhancement. The first step is to determine the quantity based pricing level. For example, if the user is purchasing 10 5X7's, and a pricing level is established for quantities 10 through 20, then all pricing would come from that pricing level. Next, the price for the option, for that price level, would be added to the price for the enhancement, for that price level, which would be added to the base price for the item, again for that price level. For example, an enhancement price of $3.50 would be added to an options price of $1.50 would be added to the base price of $20.00, which would equal the new item price of $25.00. Finally, this new item price of $25 would be multiplied by the quantity of 10 to equal the extended price of $250.

a. **Base Price.** To select the base price, click on the words "Base Price" in the middle left of the screen. This will activate the data entry area and allow you to enter the price for the item by level. If there is no level pricing for the item, you need only enter a price in the Level 1 window. When done, click on Save Line.

b. **Add Option.** Options are additional items that may be purchased at the time the item is invoiced. Examples may include framing, mounting, or sprays. Options are user maintained and are added on the Price List Screen under the menu option Maintenance, Options. Enter the price of the option for each pricing level. If there is only one pricing level, you only need to put the price in the first window. Click "Save Line" to record your prices.

c. **Add Enhancement.** Enhancements such as retouching can be added to the base price of a print. Enhancements are also user maintained from the Price List Screen. Clicking on this button allows you to select the desired option in the Description window.

d. **Description.** Clicking the down arrow will allow you to select the option or enhancement description of all the options or enhancements that you have defined. You must select a description and it must be from the pre-created list.

e. **Sort Order.** If you'd like your options or enhancements to display on the screen in a certain order, assign a sequential number or letter representing the placement of the item in this box.

f. **Price Boxes by Level.** As you enter options and enhancements available for this item, place the appropriate pricing by level in each box. Then click on Save Line (or Remove Line if you do not wish to save your entries).

6. **Detail Section: Cost Tab.** Information about the actual cost of an item, the amount you pay your vendor for this item, is entered on this screen. It looks and functions just like the Pricing Tab. However, the amounts listed here are not the retail pricing, but the item's actual cost. You can also enter the actual costs of Options or Enhancements. Information entered here is used in profit analysis reports. This tab is not required unless you plan to use accounting profit reports.

7. **Detail Section: Packages Tab.** This tab is only available if you are creating an item under the packages category of your price list. To create a package, each item in the package must already be on your price list. Simply select each item for the package from the drop down list. Choose the quantity of that item for this package. Any options or enhancements that you created for each item are also available in the package. You may select 1 option and 1 enhancement for each item. If you want the items in the package to appear in a specific order, enter a sequential number or letter in the "Sort Order" field. When you invoice for this package, all the components of the package will print on the invoice, in the sort order you specify.
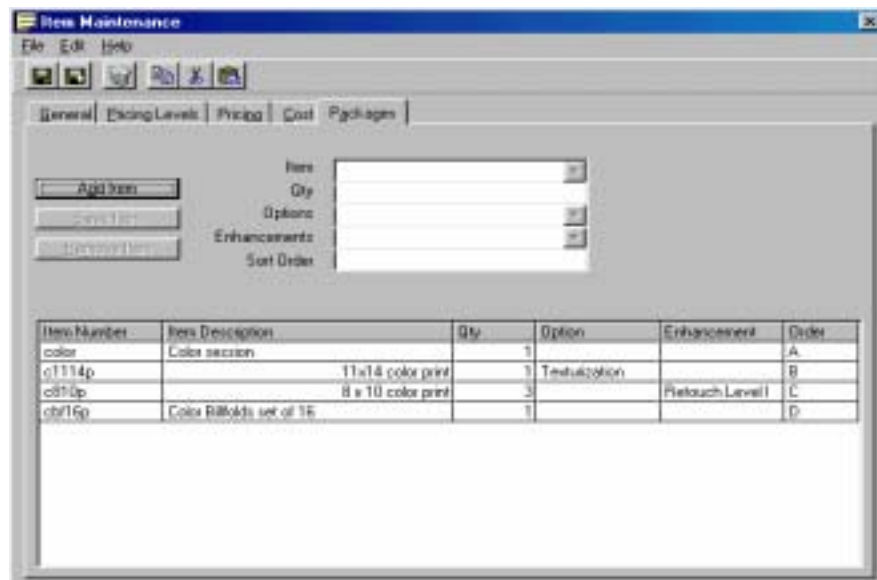
To edit any item in the package, double-click on that item. Make that change in the data entry window and click Save, or click Remove Line if you wish to delete the package item. You must save each individual line in the package as well as saving the entire item package by using the Save icon.

Application Utilities

Importing Client Records

Portrait One Manager allows you to import client records from other programs. The types of files that Portrait One Manager recognizes are; ASCII comma delimited, and Excel® spreadsheets. To import client records follow the steps below.

Importing Client Records Using a New Data Source

1. From the Utilities menu, choose Import Clients.

2. The import wizard will launch. Accept the default "Import from a new data source" and then click Next.

3. Choose the type of file you will be importing and then click Next.

4. Locate the file and click the Open button.

5. Find the appropriate field in the right hand window (they start with "fld" which is a programmer's naming convention) and drag it to the corresponding column in the left-hand window.

6. When you are through assigning all of the fields, click Next.

7. Click 'Automatically Assign Client Number' if you are not importing a pre-assigned client number for each client.

8. Click 'Assign to Client Group' if you want these clients to be placed in a new or existing client group. Click Next.

Here's a Flash for You!

It is recommended that you place your new clients in a new group called something like 'Import Sept 1'. That way, after the import is complete and if you discover something went wrong, like you forgot to import a field, then you can delete the group of clients you just imported using the 'Delete a Group of Clients' feature and then re-import them.

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9. If this is an import that will be done again in the future, you can save it as a template. This will save you from having to assign the fields again. To save it as a template, click the Save Template button. Type in the name you want to assign to this template and click the O.K. button.

10. Click the Finish button.

Importing Client Records Using an Existing Template

1. From the Utilities menu, choose Import Clients.

2. The import wizard will launch. Choose the option "Use an existing import template" and then click Next.

3. Choose the template from the list and click O.K.

4. Locate the file and click the Open button.

5. As you have already saved this as a template, you can just click the Finish button. (If you want to save it as a template again you can, but you must give it a unique name.)

Export Clients

Portrait One Manager has the ability to export a group of clients to an ASCII text file (comma-delimited).

1. From the Utilities menu, choose Export Clients to launch the Export Wizard.

2. Choose the filter or group of clients that you want to export. Click Next.

3. Enter the path and file name of the text file that should be created during the export. Click Next.

4. Click Finish to begin the export.

Import Price List

Portrait One Manager has the ability to import a new price list or import modifications to an existing price list. For further details, visit www.StudioPlusSoftware.com for technical specifications or call your technical support department.

Backing Up Data Files

Portrait One Manager can make a backup copy of your database for you. To make a backup of your database files, follow the steps below.

1. From the Utilities menu, choose Backup Data Files.

2. You will be prompted for the location to place the backup. Unless you are placing the backed up files onto a separate drive, like a zip drive, you should accept the default location. Click Backup. It is highly recommended that you copy these backup files to other media such as a tape drive, zip disk, or CD. You risk losing both sets of files by keeping them on the same hard drive.

3. Portrait One Manager will create a zipped file that contains the data files. If you ever need to restore a backed up copy of the data files, use the Database Utility found under the Start Menu ⇒ Program Files ⇒ Portrait One Manager.

ATTENTION!

Make sure that you backup your data files DAILY, by either using the Portrait One Manager backup utility or by using your own backup software! If your data files become corrupted beyond repair or if your hard drive crashes, you will lose all of your data, unless you have a current backup.

Compacting Data Files

Here's a Flash for You!

It is highly recommended that you Compact your data files periodically, at least weekly. But why? Portrait One Manager stores its data in Microsoft Access Data Tables. Access builds its own internal temporary files. Running a compact rebuilds the data files and removes any temporary files. Not only will the data files be reduced in size, but performance can increase, and data corruption can be prevented.

To Compact the Portrait One Manager database, follow the steps below.

1. From the Utilities menu, choose Compact Data Files.

2. A message will appear indicating that Portrait One Manager must close and all other users (only if you are compacting the network installation) must exit the program.

3. Click the O.K. button. Portrait One Manager will close, the compact will complete, then Portrait One Manager will reload.

Application Tools

Form Letter Builder

Form Letter Builder allows you to create form letters to be used in mass mailings or broadcast emails.

 Pathways to Success

How do you currently market to your customers? Do you know what your customers' interests are? Do you tailor and personalize your marketing to each client? Using Portrait One Manager to its fullest potential can greatly help you increase your studio's revenue. Give some thought to how you can utilize Portrait One Manager to more effectively market your products and services to your client base.

Adding a Form Letter

1. From the Tools menu, choose Form Letter Builder.

2. Click on the Add button.

3. Enter a description of the form letter you are about to create.

4. Choose the Filter (if any) from the drop down box. Choose the user (it will default to the current user if left blank) from the drop down box. Click OK.

5. If you are planning to e-mail this letter, then select File ⇒ Letter Properties to enter the Subject Line for the e-mail.

6. Next, create your letter. Use any formatting tools on the tool bar to customize the letter. If you want the letter to contain personalized information from the client's records, click the Insert Field button. Select the field from the database you want inserted in the letter and click OK. To insert the current date, select Date(Now) from the list.

7. After you're done building the form letter, click File ⇒ Save. Click File ⇒ Quit to close the Form Letter Builder.

Deleting a Form Letter

1. From the Tools menu, choose Form Letter Builder.

2. Click on the form letter you want to delete.

3. Click on the Delete button.

Modifying a Form Letter

1. From the Tools menu, choose Form Letter Builder.

2. Click on the form letter you want to modify.

3. Click on the Modify button.

4. Make your modifications to the form letter.

5. Save your form letter.

Copying a Form Letter

1. From the Tools menu, choose Form Letter Builder.

2. Click on the form letter you want to copy.

3. Click on the Copy button.

Printing a Form Letter

1. From the Tools menu, choose Form Letter Builder.

2. Click on the form letter you want to print.

3. Click on the Print button.

4. Select the filter you want to print the form letter for.

Here's a Flash for You!

Form letters can also be printed for a single client from either a client, session, or invoice information screen File Menu.

E-mailing a Form Letter

1. From the Tools menu, choose Form Letter Builder.

2. Click on the form letter you want to e-mail.

3. Click on the E-mail button.

4. Select the filter you want to e-mail the form letter to.

Here's a Flash for You!

You must perform any e-mailing on a PC that already has a MAPI-compliant e-mail program installed and operational.

Filter Builder

Bugged About Something??

What is a Filter?

A filter is a method to select a group of records. A filter can be used to determine which group of records should be shown on the report. A group of call records can be created for all the clients in a filter. An email can be sent to all the clients in a filter. A Sales Analysis Report can show total sales figures for all invoices in a filter.

When you create a filter you tell Portrait One Manager which field or fields you want to use to search for records containing certain information. Follow these steps to create a new Filter.

Adding a New Filter

1. From the Tools menu, choose Filter Builder.

2. Click the Add button.

3. Type in a description of the new filter.

4. Select the type of filter you want to create.

5. Choose the first field you want to use to perform your criteria search from the drop down list.

6. Choose the operator from the drop down menu.

7. Fill in the value you will be filtering on. If you want to search for all blank values don't enter anything into the value field. If you want to conduct a search based on the current date, type Date() in the value field, or type Date() + 7 representing the current date plus 7 days.

Here's a Flash for You!

Here are some examples of various criteria expressions you may create:

Client–City = Chicago	(Includes all clients in Chicago)
Client–Last Name Like M*	(Includes all clients with last names starting with M)
Client–Zip Code >= 60000	(Includes all clients whose zip code is greater than or equal to 60000)
Session–Date < Date() + 1	(Includes all sessions before tomorrow's date)
Session–Date =	(Includes all sessions with no session date)
Invoice–Delivered Date <>	(Includes all invoices where the delivered date is not blank)
Invoice–Invoice Total < 100	(Includes all invoices under $100)

---

8. Click the Add button and repeat steps 5-8 for each search criteria you want included.

9. To verify how many records are in your filter, click the update count button.

10. To specify how your group of records is sorted, click the Sorting tab. You can select one or more fields to sort by and you can specify whether you want the records sorted in ascending or descending order.

11. Click OK to save your filter.

Deleting an Existing Filter

1. From the Tools menu, choose Filter Builder.

2. Click on the filter you want to delete.

3. Click the Delete button.

Modifying an Existing Filter

1. From the Tools menu, choose Filter Builder.

2. Click on the filter you want to modify.

3. Click on the Modify button. Make changes as needed.

Copying an Existing Filter

Copying an existing filter is a great way to take an existing filter, copying it so that it can be modified slightly to make a new one, without having to create a new one.

1. From the Tools menu, choose Filter Builder.

2. Click on the filter you want to copy.

3. Click on the Copy button.

4. Edit the copy to change the criteria or sort information.

Wizard Builder

Portrait One Manager is well known for its easy-to-use wizards to quickly and accurately enter data into the program. The Wizard Builder allows you customize these wizards to better suit the way your studio operates. Click Tools $\Rightarrow$ Wizard Builder. Select the drop-down menu at the top of the screen to select the Wizard that you want to modify. Click the plus signs next to the pages that you want to open up to see more pages. For each page in the wizard you can modify the Page Header that appears at the top of each page. You can also choose to Hide certain pages that may not pertain to your studio. Certain pages are required by the Wizard and cannot be hidden. Close the form by clicking the X in the upper right corner.
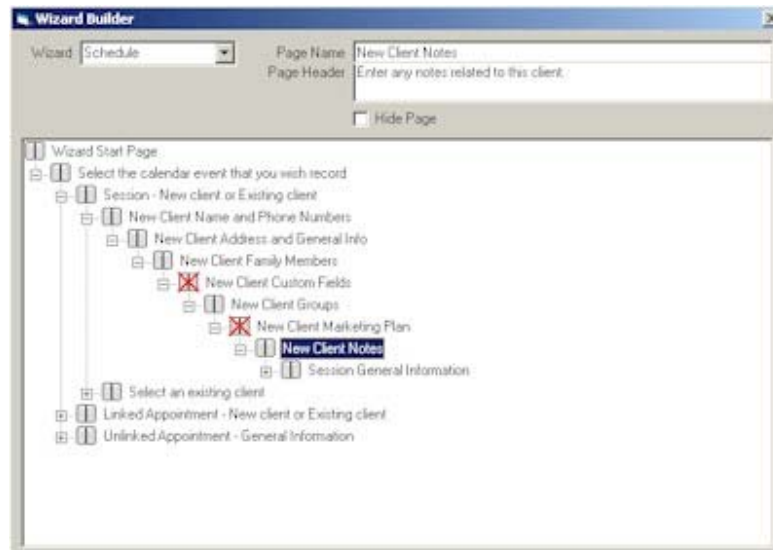
Archived Image Finder

If you use Portrait One Manager to archive images to CD's, then you can use the Archived Image Finder to search through all the archived files to find out which CD the desired images are on. Click Tools ⇒ Archived Image Finder. Select your search criteria from the list including Archive CD Number, Archive Date, Client Name, File Name, Last Modification, Session Date, Session Number, and Studio Number. Enter the data to search for and press Enter.
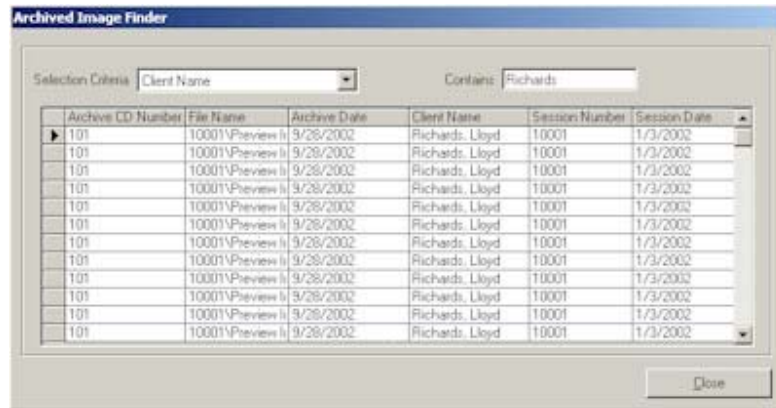
Add Clients to a Group

Client Groups are a great way to categorize or group your clients for various purposes, such as mailing lists, phone calls, or reports. Use this feature to quickly add a group of clients, for a filter or another group, to the desired group. Click Tools ⇒ Add Clients to a Group. Follow the steps of the wizard to either add the clients to a new group or an existing group, and then to select the client group or filter of clients that should be added. Click the Finish button to perform the operation.

Remove Clients From a Group

Client Groups are a great way to categorize or group your clients for various purposes, such as mailing lists, phone calls, or reports. Use this feature to quickly remove a group of clients from the desired group. Click Tools ⇒ Remove Clients from a Group. Follow the steps of the wizard to select the group the clients should be removed from, and then to select the client group or filter of clients that should be removed. Click the Finish button to perform the operation.

Create a Group of Call Records

Call Records are a great marketing tool to track who needs to be called for upcoming sessions and appointments. You also might want to make a call record for a client that is overdue on a payment or still has proofs outstanding. To create a call record, follow the steps below.

1.   Click Tools ⇒ Create a Group of Call Records.

2. A Create Call Records wizard will appear to walk you through the process.

3. From the drop down box choose the filter for the group of clients you want to make the call records for. This works great for special events. When used with a filter using Groups or Calling Plans, you can set up call records to many clients without having to remember, or search for, who might be interested in the next special event. Click Next.

4. Enter in all of the necessary call information. Click Next.

5. Enter your notes about the call record. Click Next.

6. A message will come up indicating that you are about to create call records for all clients in the current filter. Click Finish.

Delete a Group of Clients

Delete a Group of Clients is just that, the ability to **permanently** delete a group of client records. This grouping will be based on an existing client group or filter that you created with the Filter Builder feature. To delete a group of records, follow the steps below.

1. Click Tools ⇒ Delete a Group of Clients.

2. From the drop down box in the Group Delete dialog box, choose the client group or filter upon which you want to base the group delete.

3. Click the Delete button.

4. You will receive a message box indicating that you are about to **permanently** delete a group of records. It will also ask if you are sure you want to continue.

5. Click the Yes button. If you don't want to continue, click the No button.

Here's a Flash for You!

If a client has existing session or invoice records, the record will be skipped and not deleted.

End of Day Posting Procedure

Posting is a process that locks financial transactions, like invoices and payments, into the system so that they cannot be changed. A posting does not technically have to occur at the end of the day, but should occur whenever you make a deposit (but not more than once a day.) When you post, the following items occur. First, summary and detail reports are printed to verify your transactions. Second, the transactions

are locked so they cannot be modified. Third, if you are using an external accounting software, such as QuickBooks, a summary of the financial transactions are exported to the accounting software. Fourth, sales tax/VAT is now calculated for the Sales Tax/VAT reports.

Bugged About Something??

Should I be concerned about Posting?

Posting is not required feature. However, if you answer 'yes' to any of these questions, then you should post and post regularly. Do you want to export your financial transactions to an external accounting software like QuickBooks? Do you want to print a daily cash receipts report that matches your deposits? Do you want to lock financial transactions so that they can not be modified after a certain date? Do you want to generate a Sales Tax/VAT report? If you answered yes to any of these questions, then you should post. If you answered no to all of these questions, than you can skip the posting procedure.

1. Click Tools ⇒ End of Day Posting Procedure

2. **Step 1 – Enter Today's Receipts**. Enter the amount of bank deposit and various credit card deposits into the appropriate fields.

3. **Step 2 – Print Posting Reports**. Check the posting report you want to see and click print. Now is the time to verify the accuracy of your financial transactions. If the deposit totals that you entered in step one do not match the transactions entered in, Portrait One Manager will post the difference to a Cash Over/Short account. If you discover that you entered an incorrect deposit amount in step one or a financial transaction, such as an invoice or payment, needs to be corrected, now is the time to do so before continuing.

4. **Step 3 – Post All Records**. Click the Post button to actually perform the posting. This step will flag all invoice and payment records as posted. Once posted, they cannot be modified.

5. Click Close to close the End of Day Posting window.

Here's a Flash for You!

Portrait One Manager gives you three different accounting methods to determine how to invoices are posted. See the Company Preferences ⇒ Accounting tab to change this option. Payments are always posted as soon as you enter them.

Cash Basis 1 - Invoices will be posted as revenue when the balance due is equal to zero.
Cash Basis 2 - Invoices will be posted as revenue when the balance due is equal to zero AND the product delivery date has been completed on the invoice.
Accrual - Invoices are posted and counted as revenue immediately when they are generated.

Bugged About Something??

Can I reprint a posting report or can I re-export data to my accounting software?

Of course you can. To do so click Report ⇒ Reprint Posting Reports. Select the appropriate Action, Reports, and Posting Date. Then click Print.

Reports

Daily Sales Report

The Daily Sales Report prints a summary of all item sales per day for any one week time period.

Sales Tax Report

The Sales Tax Report provides sales tax information for each sales tax rate established in each sales tax location. Either a summary or a detailed version can be printed.

Accounts Receivable Aging Report

The Accounts Receivable Aging Report is available in either a summary or detailed format.

The Aging Summary Report lists the total amounts not yet due, total amounts past due, and total open balance for each client.

The Aging Detail Report lists the invoice number, date, bill-to name, invoice total, amount paid, open balance, and due date for all invoices with a past due amount. This report is grouped by client.

Reprint Posting Reports

The Reprint Posting Report feature gives you the ability to reprint a posting report for a specific day. You can also re-export posting data to your accounting software for a specific day.

Print Group of Invoices

The Print Group of Invoices feature is great if you need to send a reminder to clients that have a past due balance. You can select a group of invoices based on a predefined filter, an invoice date range, or based on the amount of days an invoice is past due. Once the Print button is clicked, you will be prompted with a confirmation showing how many invoices will be printed. Click OK to continue with the printing.

Client Lists and Labels

Client Lists – The Client List prints a client name, number, address, and home phone for each client in a client group or filter.

Mailing Labels – Mailing Labels print the client name and address for each client in a client group or filter. Labels are printed in a standard Avery 5160 format.

Account Labels – Account Labels print the client name, number, address, and home phone for each client in a client group or filter. Labels are printed in a standard Avery 5160 format.

Session Lists and Labels

Session Lists – The Session List prints a client name, session number, start time, end time, session type and status for each session in a session promotion or filter.

Session Labels – Session Labels print the client name, client number, session date, time, type, photographer, and session number for each session in a session promotion or filter. Labels are printed in a standard Avery 5160 format.

Invoice Lists

The Invoice List provides the invoice number, invoice date, due date, bill to name, sub total, discount, shipping, tax, invoice total, amounts paid, and open balance of all invoices that exist in a particular filter. Totals are also provided at the end of the report.

Payment Lists

The Payment List provides the payment date, invoice number, invoice date, session number, client number, bill to name, credit card or check number, payment amount, and current open balance of all payments that exist in a particular filter or within a particular payment date range. Payments can also be grouped by payment method. Totals are also provided at the end of the report.

Price Lists

The Price List report prints a list of all the items in a chosen price list. The report details the item identifier, description, and price for each item. Items are grouped by the item group the item belongs to.

Order Status Reports

The Order Status Report prints a list of all the Proof or Production Orders that match a certain criteria. Criteria can be based on all statuses, a single status, or a predefined filter. In addition, the report can also be limited to a certain due date and/or a certain vendor. Once the criteria has been selected, you can select how the orders should be sorted, by order number, due date, or client name. The report includes the order number, due date, status, vendor, and client name for each order. In addition, the report also tells the total value, taken from the invoice totals, of the orders in each status. This information can be very helpful in determining cash flow projections. For example, you may have $2,592 worth of orders sitting on your shelf waiting for clients to come in and pick up.

Pictorial Directory

If you have access to digital images for your clients, the Pictorial Directory can be a great product that you can provide to your clients. It can be printed, placed on a CD, or placed on a web site. What is a Pictorial Directory? It is a document that you can generate that includes an image of each client along with customized text that appears below each image. Here's how it works. For each client that you want included, you must select a primary image. This can be done by clicking File ⇒ Acquire Client Image on the client information screen or by right clicking on an image on the Session ⇒ Images tab and clicking Make This Image The Main Client Image. To confirm that a client has an image selected, click File ⇒ Preview Client Image on the Client Information Screen. Next, click Reports ⇒ Pictorial Directory. Select the criteria for the report and the display options. Most importantly, click the Edit Image Captions button to determine what text you want to appear under each image. The document can then be printed or exported as an Adobe PDF or HTML document.

Pathways to Success

Be creative with how you use Pictorial Directories. Sell it as an actual product to generate additional revenue or give it to your client as an incentive or perk. Here are some examples of how you can use this exciting product:

- Religious organizations like churches
- Non-profit organizations or clubs
- Sports teams like a soccer team
- Dance teams
- Corporate directory

High School Senior List

The High School Senior List is a simple report that prints a list of all the High Schools that have been entered in the High School Maintenance List. The report includes the high school name, address, phone, yearbook deadline, and yearbook requirements.

Senior Session List

The Senior Session List prints a status report of all the sessions for one or more high schools. The report is based on a session date range. The report includes session number, date, client name, home phone, and the session status.

Profit Analysis Report

The Profit Analysis Report is a powerful tool to help evaluate the performance of your studio by determining how profitable your sessions are. First, select what type of

report you want to generate, General, Client Group, or Session Promotion. The report type will determine what filter and grouping options are available to you. Next select a filter or a date range to determine which invoices should be included in the report. Then select how you want your report to be grouped. Do you want to view the profitability of your different session types, photographers, lead sources, promotions, or a certain client group? Then print or preview the report. The report will then show the number of sessions in each grouping, the total revenue and total profit for each group, the average revenue and profit for each session, and a gross profit margin for each group. How does the report calculate total revenue? The report totals all the subtotals for each invoice that belongs to all the sessions in the group. How does the report calculate total profit? The report calculates profit by taking the total revenue minus the total cost. The cost of each session can be determined by you in the Company Preferences $\Rightarrow$ Reports 2 tab (see Application Maintenance section of this manual.)

Sales Analysis Report

The Sales Analysis Report is another powerful tool to help evaluate the performance of your studio by viewing sales figures broken down in a variety of formats. First, select what type of report you want to generate, General, Client Group, or Session Promotion. The report type will determine what filter and grouping options are available to you. Next select a filter or a date range to determine which invoices should be included in the first column of the report. Optionally, you can select a second column of data, which is useful to compare two months, quarters, years, etc. Then select how you want your report to be grouped. Do you want to view sales figures for each photographer, sales person, lead source, promotion, or client group? Then print or preview the report. For each group, the report will break down the sales figures by the product lines that you have assigned to each item. The Quantity Sold columns simply totals all the quantities for the items that appear in this product line. This number is helpful to compare the number of products sold in a product line versus the total revenue generated for this product line. The Total Sales columns total all the sales for this product line and grouping on the report. The Percentage columns are helpful to compare how each product line and report grouping compare to the overall revenue of the studio.

Session Trends Report

The Session Trends Report totals the number of sessions for each session type on a monthly basis. The report lists current year, previous year and percent change figures.

Custom Reports

Do you need a report that Portrait One Manager does not provide? No problem. Because Portrait One Manager stores its data in a Microsoft Access database, you can create your own custom reports using Microsoft Office products, like Word, Excel, and Access, or third-party report generator like Crystal Reports by Seagate. The most powerful tool to create custom reports is Microsoft Access, which can be purchased stand-alone or as a part of the Microsoft Office Professional Version. The version must be 2000 or greater. Portrait One Manager stores its data in a file called SamDB.mdb. You must attach your application, like Word, Excel, or Access, to this

file to get access to your data.   For more information on creating your custom reports, see Word, Excel, Access, or other third party documentation.

Database Utilities

Features of the Database Utility

The Portrait One Manager Database Utility is used maintain the Portrait One Manager data files. To use the Database Utility, click the Start Menu ⇒ Programs ⇒ Portrait One Manager ⇒ Database Utility.

2. **Create New Data Files**. Use this feature only if you want to create a new blank set of data files. After clicking this button, you will be prompted to determine the location of the new data files. You must select an empty folder that does not already contain a set of data files.

3. **Move Data Files**. Use this feature if you want to move the data files to a new location. A common use of this feature is to move from a Single User Installation to a Multiple User Installation by moving the data files to a new location on your file server. After clicking this button, you will be prompted to select the new location for the data files. You must select an empty folder that does not already contain a set of data files.

4. **Attach to Different Data Files**. Use this feature if you need to connect to a different set of data files than you are already connected to. After clicking this button, you will be prompted to choose the data files that you wish to connect to.

5. **Compact and Repair Data Files**. Two reasons exist to use this feature. First, to keep your database running optimally, it is recommended that you compact the data files regularly. Second, if you ever receive an error similar to 'Unrecognized Database Format' when you launch Portrait One Manager, you need to repair your data files. It is recommended that you backup your data files prior to running a Compact and Repair.

Here's a Flash for You!

It is highly recommended that you Compact your data files periodically, at least weekly. But why? Portrait One Manager stores its data in Microsoft Access Data Tables. Access builds its own internal temporary files. Running a compact rebuilds the data files and removes any temporary files. Not only will the data files be reduced in size, but performance can increase, and data corruption can be prevented.

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6. **Backup Data Files**. Use this feature to create a backup copy of your data files. After clicking this button, you'll be prompted to choose a location for your backup. If you choose the default Backup folder, then you need to be responsible to copy these files onto a separate media, like a zip disk, CD, or backup tape.

 ATTENTION!

Make sure that you backup your data files DAILY, by either using the Portrait One Manager backup utility or by using your own backup software! If your data files become corrupted beyond repair or if your hard drive crashes, you will lose all of your data, unless you have a current backup.

7. **Restore Data Files**. Use this feature if you ever need to restore a backup copy of data files. Remember, this feature will replace your current data files with a previous copy. Only proceed if you no longer need the data files you are currently attached to. After clicking this option, select the folder that contains the backup you want to restore. Then select the backup that you want to restore and click the Restore button.

8. **FTP Data Files to Tech Support**. Use this feature only if instructed to by a technical support specialist. Doing so will zip your data files and transfer them over the Internet to the Portrait One Manager Technical Support Department.

Appendices

Getting Technical Support

Portrait One Manager is continually being enhanced and updated. All updates and upgrades will be posted to our web site (www.StudioPlusSoftware.com) regularly. We recommend that you check it often and download the newest updates.

From online services to expert telephone support, we at Portrait One Manager Software offer several avenues of technical assistance so that you can be assured of having your questions answered quickly and professionally. You can reach us in any of the following ways:

Email
Support@StudioPlusSoftware.com (or click Email Technical Support from the Help Menu)

Web
www.StudioPlusSoftware.com

Telephone
(763) 689-1131, Option 2 (Monday-Friday 8:30 AM - 5:00 PM Central Time USA)

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9.   GENERAL

This Agreement (and any Support Services agreement then in force) constitutes the entire agreement and understanding between the parties regarding the subject matter, and supersedes all prior oral or written agreements or understandings. This Agreement may only be waived or otherwise modified by a written addendum signed by the authorized representatives of the parties.

In the event a court of competent jurisdiction determines that any portion of this Agreement is invalid or unenforceable, such a finding shall not invalidate the remainder of this Agreement, which will remain in full force and effect.

You agree that any breach or violation of this Agreement involving the unauthorized use or disclosure of confidential or proprietary information or materials is likely to result in irreparable harm to StudioPlus, and that in such event, that StudioPlus will be entitled to obtain a court order enjoining you from such conduct.

In the event any lawsuit or other enforcement action is undertaken to enforce StudioPlus' rights hereunder, you agree to reimburse Studio Plus for its reasonable attorney's fees and other costs incurred in enforcing such rights.

Quick Reference Guide

Quick Reference Guide

How to enter a new client?
From any browse screen, click **File⇒New Client** or press Ctrl+ N.

How to find an existing client?
Change to the Client Browse Screen and enter a selection criteria at the top right of the screen. Double click on the desired client.

How to enter a new session?
From the Calendar Browse Screen, double click on the desired date and time for the photographer of the session to launch the Schedule Wizard.

How to find an existing session?
If you know the date and time of the session, switch to the calendar browse screen, find the date and time for the photographer, and double click on the session box on the calendar. If you know the session number, switch to the Session Browse Screen, enter the session number in the selection criteria field at the top of the screen, and double click on the desired session. If you know the client's name, follow the instructions above to find the desired client. Next, click on the Session detail tab to find the desired session and double click.

How to enter an invoice?
Find the appropriate session that the invoice is related to by using the steps described above. From the Session Information Screen, click on the New Invoice button on the tool bar.

How to find an existing invoice?
If you know the invoice number. switch to the Invoice Browse Screen. Enter the invoice number in the selection criteria field at the top of the screen and double click on the desired invoice. If you know the client name, session number or date, follow the steps above to find the existing client or session screen. From the Client or Session Information screen, click on the Invoices detail tab and then double click on the desired invoice.

How to enter a payment?
Use the steps above to find the invoice for which the payment is being received. From the Invoice Information Screen, click on the New Payment button on the tool bar.

How to view phone calls that are due?
Switch to the Phone Calls Browse screen and use the select user field at the top of the screen to choose the user or users for which phone calls should be displayed. Clicking on the due date column header in the grid will sort the phone calls in the order of their due date.

How to view production status?
Switch to the Production Browse Screen. This screen may be displayed in a number of ways by using the criteria selection in the upper right corner.

How to enter a proof order?
Given the steps above, find the session to which the proof order is related. From the action menu, select 'Create new proof order'.

How to enter a production order?
Given the steps above, find the invoice that relates to the production order you wish to create. From the action menu, select create new production order.