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LabWorks™ Management System

Version 8.0 Upgrade

march ‘08

Installation

Upgrading the Server

Important: **Before upgrading your system, it is always a good practice to perform a backup of your database and save it to a safe location.**

The v.7 setup file is provided by Lablogics and can usually be found in the “LabWorks\Install Files” folder on your server.

1. Double-click **Setup_80?.exe**, which is the v.8 setup file.

2. The installer may take a few moments while it scans the system for previously installed components and other settings.

3. View the ‘Welcome Page’ and click on the **NEXT** button.

4. Choose the destination location (Default: **C:\LabWorks**).

5. For Setup Type choose **“SERVER”** and click on the **NEXT** button.

6. Click **NEXT** on all the following screens.

7. Once the files are copied and updated, click on the **FINISH** button.

8. Launch LabWorks… The program may take a few minutes before bringing up the login screen as it updates the database on first run.

Upgrading Client Stations

Only upgrade client stations once the server has already been upgraded successfully. Only the server version can make the necessary database changes for proper client operation.
The number of client stations which can be installed is determined by the number of user licenses specified on the License Agreement with Lablogics. A Lablogics’ sales rep may be contacted for further clarifications.

1. Double-click **Setup.exe**, which is the v.7 setup file.
   (The setup file can be run directly from a network drive, or copied from the server)

2. The installer may take a few moments while it scans the system for previously installed components and other settings.

3. View the ‘Welcome Page’ and click on the **NEXT** button.

4. Choose the destination location (Default: **C:\LabWorks**).

5. For Setup Type choose “**CLIENT**”.

6. Click **NEXT** on all the following screens.

7. Once the files are copied and updated, click **FINISH**.

8. Find the LabWorks icon on the desktop and double-click on it.

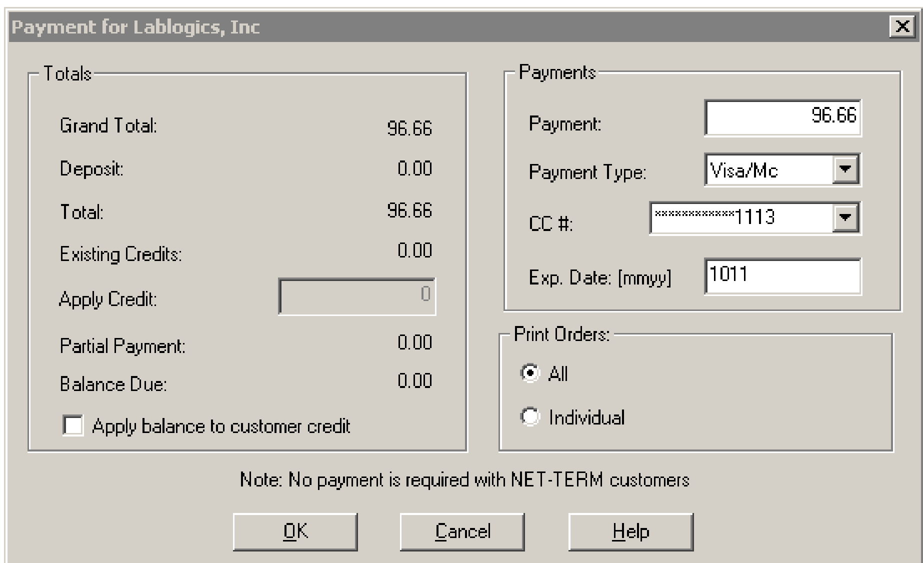
9. LabWorks should come up with a Login and Password page. LabWorks has been successfully installed on the Client Station. Repeat the same procedure for all stations.

> *A -101 error, while trying to run LabWorks on the client station, is indicative that LabWorks is not currently running on the server.*

LabWorks™ Credit Card Processing Module

To provide you with a convenient, fast and cost effective solution, LabWorks is now using the advanced on-line technology offered by **Century Business Solutions**.

- Keep multiple credit cards on file for every customer
- Invoicing customers with credit cards on file with a click of a button
- Charging end-of-the-month balances
- Swiped and keyed in transactions



- Reduced costs and increased profit through competitive discount rates and better qualification of processed cards.
- A business relations manager will be assigned to you as a single point of contact for all credit related questions and issues.
- Detailed and extensive online reporting.

Century BUSINESS SOLUTIONS™

To order this module, contact your sales representative at Lablogics: 888.404.0008

This module is currently available only for US clients!

LabWorks™ – Labtricity Integration Module

A new add-on module has been created for LabWorks™ version 8 to seamlessly integrate with Express Digital's Labtricity. The primary feature of this system is that you don't need to re-enter your orders into LabWorks. No more double typing. No more typo mistakes.

- Handles both open, and private network orders from Express Digital
- Automatic customer entry
- Scheduling the on-line jobs, directly into your workflow
- Customer discounts, special and negotiated pricing
- Tiered pricing
- Shipping, and drop-shipping scheduling

LabWorks™ - Labtricity module automatically retrieves all the information necessary from the XML order files to create a trackable work order, with features such as flexible tiered pricing, standardized invoicing and more. What better way to manage your Labtricity workflow than with LabWorks™ Lab Management system and our XML processing module!

To order this module, contact your sales representative at Lablogics 888.404.0008

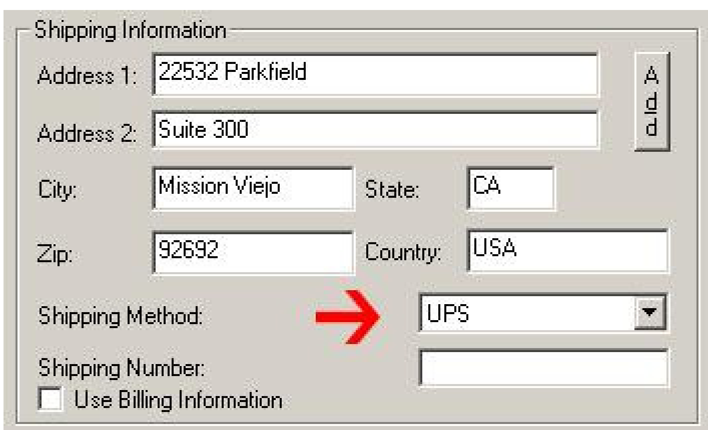
LabWorks™ – ROES Integration Module

What's new in version 8 for LW-ROES?

- **Inventory Items**: LW-ROES now handles import of Inventory Items, setup in LabWorks Inventory Module.

- **Automatic Shipment Scheduling**: An automatic shipping record can be scheduled for a ROES order, with customer's default shipping address if:

  1) The customer has a Default Shipping method in its customer profile.

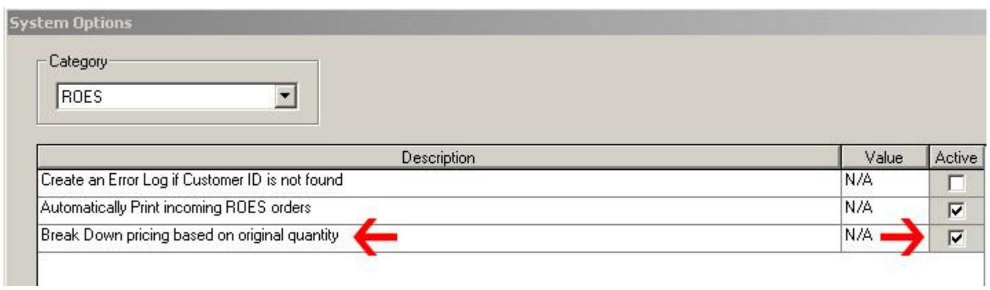


  2) If the following system option in 'Customer Service Screen' category is checked:

- **Automatic Drop-Ship Scheduling**: An automatic shipping record can be scheduled for a ROES DROP-SHIP order, if the POF file includes the following information, in the header section:

```
ShipToAddress2=
ShipToCity=Mission Viejo
ShipToState=CA
ShipToZip=92692
ShipToPhone=888-404-0008
ShipToEmail=brian@lablogics.com
ShipToAltPhone=949-600-5310
ShipToNotes=
```

- **Price Breakdown of ROES order items, based on total number of prints**: As and example if there are several 4x6 print orders within one ROES pof file, LabWorks can now combine all of the prints into one line item and offer a tiered pricing. To activate this option, the following system option needs to be checked:



Price tiers need to be setup in 'Setup Pricing' screen.

- **Scheduling a due date and due time for ROES order items**: ROES line items are now automatically scheduled within the LabWorks workflow.

New! Email Options

The new LabWorks Email options allows for emails to be sent directly from LabWorks system .

There are several email options that can be triggered automatically and without user intervention:

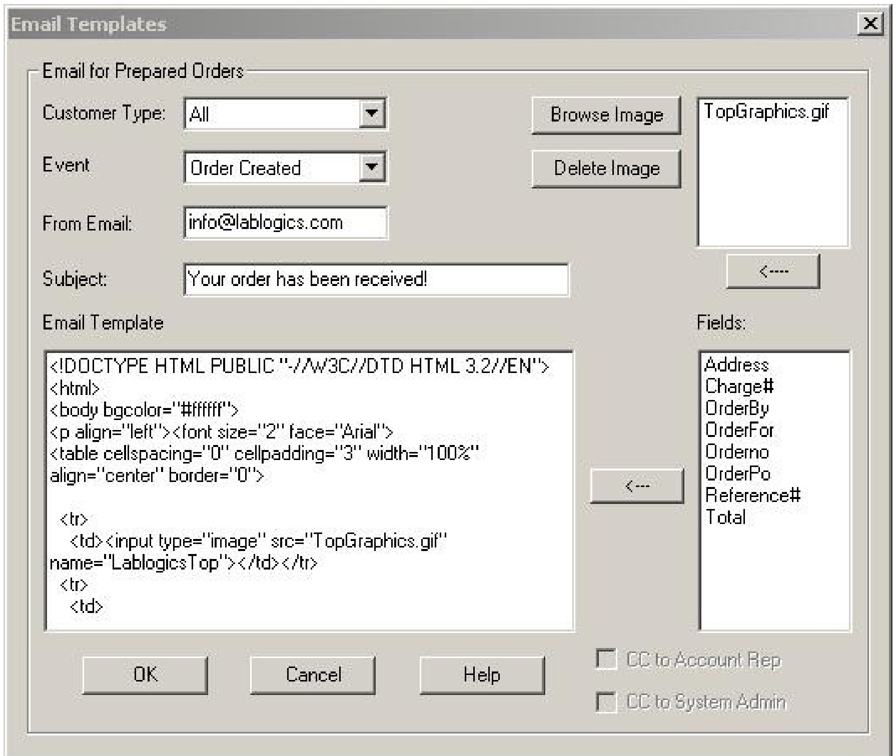
- Account Created
- Received Orders
- Completed Orders
- Shipped Orders

User-triggered events are, emailing:

- Sales Quotes
- Invoices
- Statements
- Purchase Orders

Setting Up Email Templates

To setup a template go to: System → Email Options



- **Choose a 'Customer Type'** to create a template for that specific customer category, or simply choose 'All' to have one template for all different types. This field is active only for automatic email events.

- From the drop down menu, **choose the event** for which you would like to create the email template. Options are:

  - Account Created
  - Order Created
  - Order Completed
  - Order Shipped
  - Promotion Advertising

- Invoice
- Sales Quote
- Purchase Order

- Enter the ‘From Email’ address. This will appear as the sending account on the created emails.
- Enter a subject line.
- Compose your desired email template in simple text or html options. There are several dynamic fields on the right side of the template box. These variables can be used in the body of the template. One of the easy ways of creating html emails is to use an html editor for creation of the body of the email. Copy and paste the source code from the editor this box.
- Images can be attached to the email. Simply browse and choose the desired image.

Triggering Automatic Emails

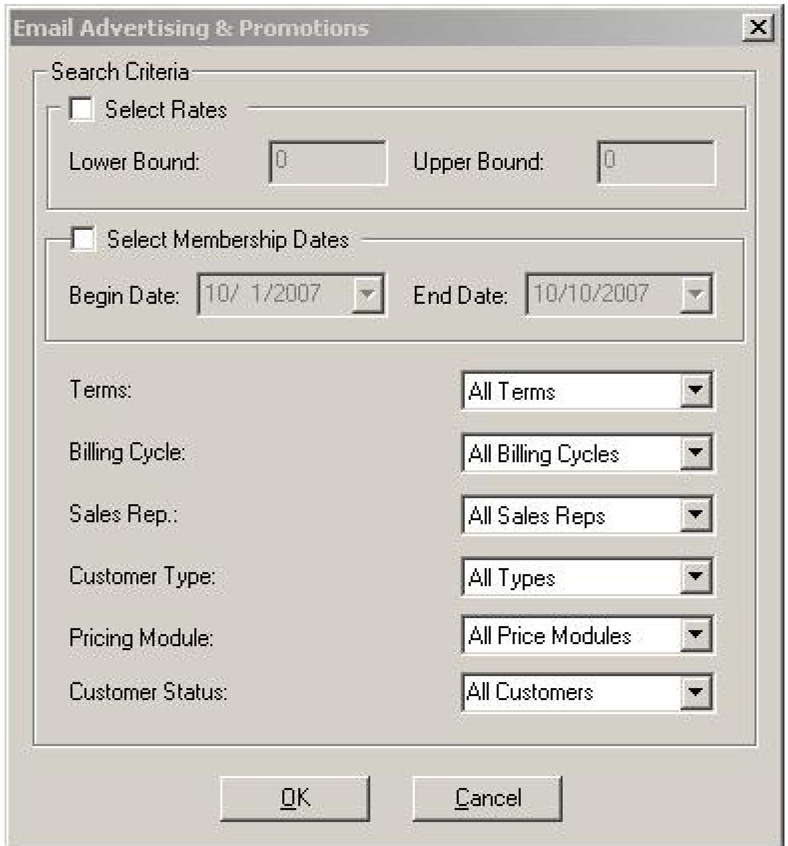
Automatic emails will be sent out by LabWorks, if:

- A template has been created for that particular event (Received Order, Completed Order, Shipped Order),
- Customer has a default email address in his/her profile

Emails will be sent out at a 2 minute interval from the server or any designated station.

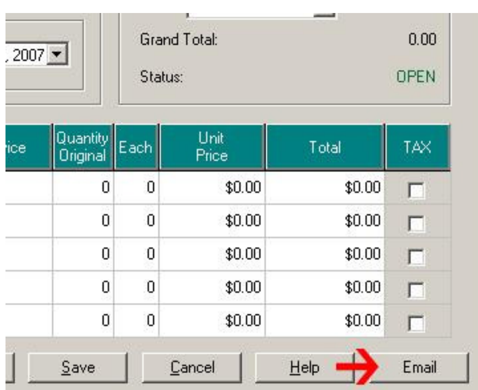
Mass Emails: Advertisments and Promotions

- Create a template for the ‘Promotion Advertising’ event and save.
- Go to Maintain → Customers → Email Advertising & Promotions.
- Select the desired filters and send the email.



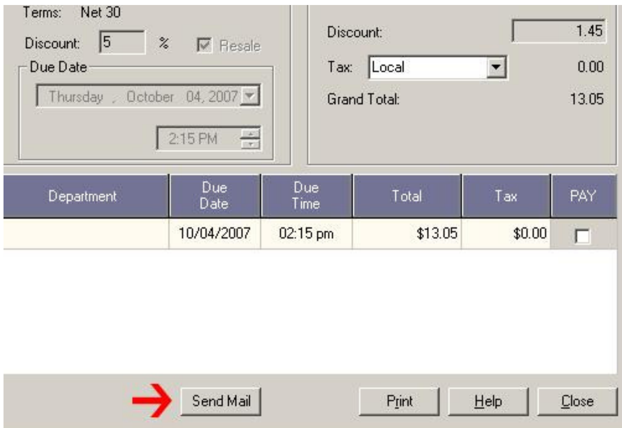
Emailing a Sales Quote

A new button has been placed for sending out an email during editing of the quote:



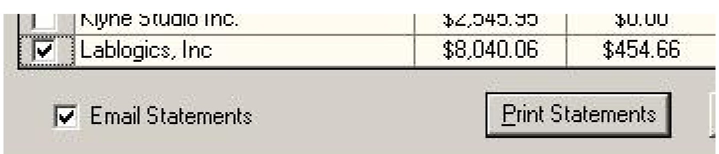
Emailing an Invoice

To email an invoice, bring it up in the Customer Service screen. A new email button will appear at the bottom of the screen:



Emailing a Statement

- In the Statements screen, generate statements as you would normally do
- Mark all of the statements that need to be emailed
- Click on the ‘Email Statements’ check box
- Click on the ‘Print Statements’ button.



Emailing a Purchase Order

A new button has been placed for sending out an email during saving or editing of the Purchase Order:

Activating Emails

One of the stations (preferably the server) can be designated to be in charge of sending out emails.

The LabWorks.ini file (C:\Windows\LabWorks.ini) on the designated station should include the following information:

[EMAILCTRLKEY]

Email=Yes

SmtpServer=205.209.154.203 ← [The SMTP Server IP Address]

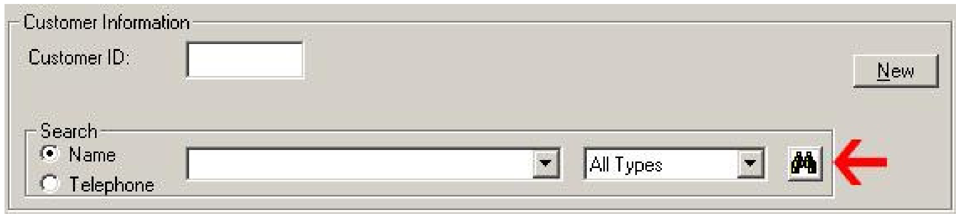
Username=username

Password=password

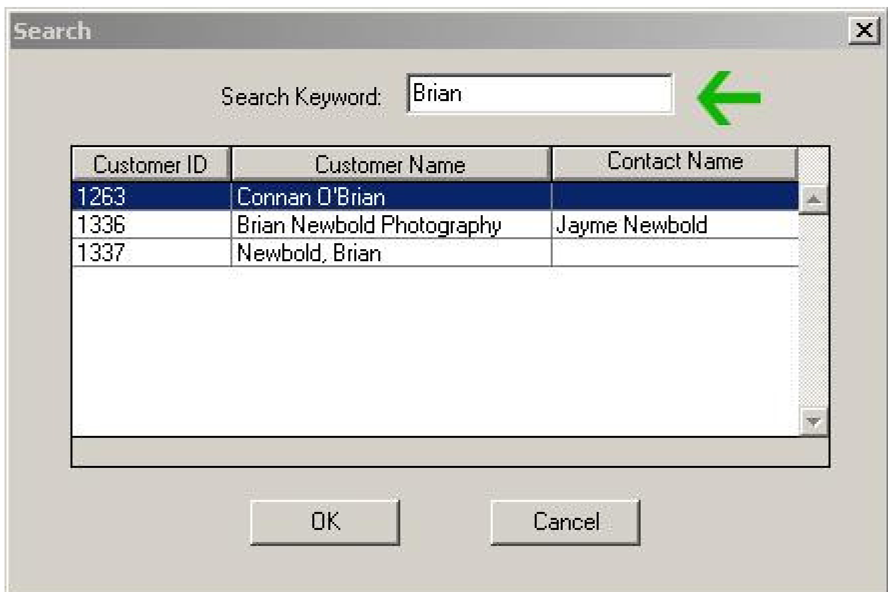
A secondary email application will be installed on the designated station that is in charge of the task of sending out queued emails. The application is called: ***LabWorksEmail.exe***

Customer Service Screen

New! Customer Search by a Keyword



By entering the Customer Search by Key, you can enter a keyword. A list of all customers with that keyword as any part of their Name or Contact Name will be presented.



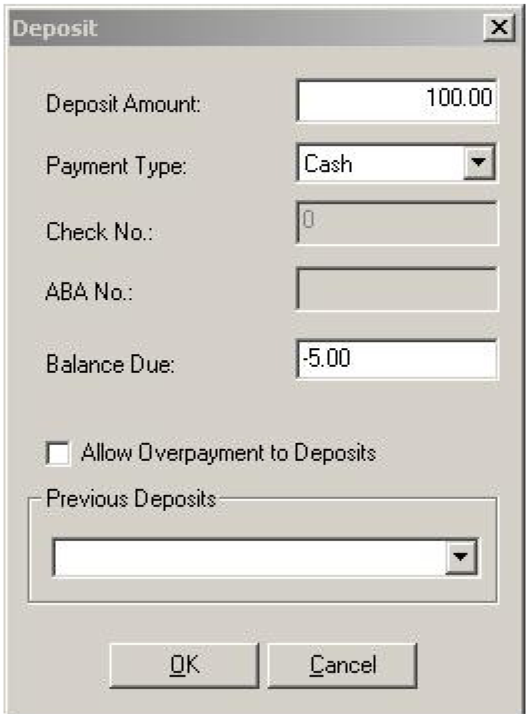
Simply select one and click on the <OK> button. The customer information will be populated in the Customer Service Screen

New! 'Country' Field

A new Country field has been added to the customer profile screen, for both billing and shipping information.

Deposit Screen

A ‘Balance Due’ field has been added to the Deposit Screen help the user determine the amount of cash tender for deposits.



In the example above, the total of the order comes to $95.00 even. If customer pays with a one hundred dollar bill, Balance Due field shows the amount that needs to be returned to the customer.

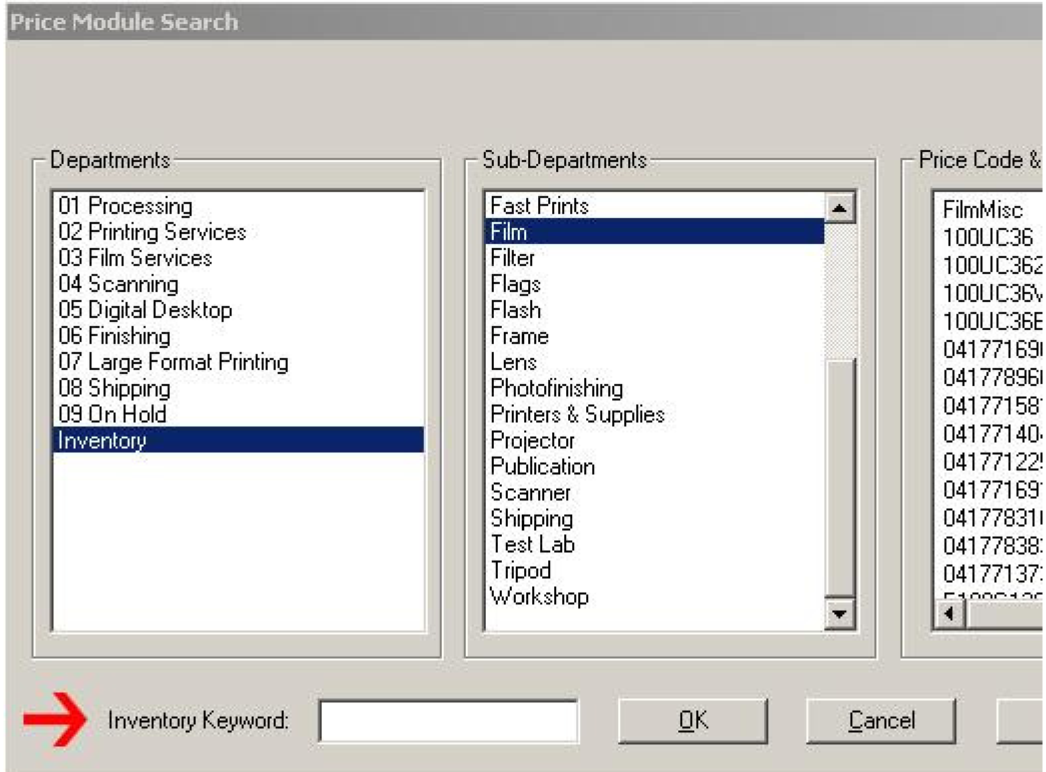
It is possible to over pay a deposit by clicking on the ‘Allow Overpayment to Deposit’ check box.

New! Inventory Item Search by a Keyword

Once you click on the Binocular button for a line item product search, a **new Inventory Keyword** search has been added to accommodate and easy query for an inventory item.

The keyword may be any part of the Product Code, Product Description, or Vendor Catalog Number.

Once you type the keyword and hit <Enter> or <Tab>, a list of viable options will appear, from which one can be selected.



Batch Prepare Order

New Icon for Batch Prepare Order Screen

An Easy Icon has been added to easily access Batch Prepare Order Screen

Actions → Prepare → Batch

The Batch Prepare Order screen is now further enhanced to handle a PO Number field as opposed to the LabWorks Order ID number. This feature helps labs that use on-line ordering system such as ROES, LabPrints, Simple Photo and Labtricity, to be able to track their orders by those respective job numbers.

Batch Invoicing

Batch Invoicing different customers at the same time

The Batch Invoice screen can now handle work orders from multiple customers.

- Simply enter order numbers from one or more customers. For faster results orders id's can be barcode scanned.

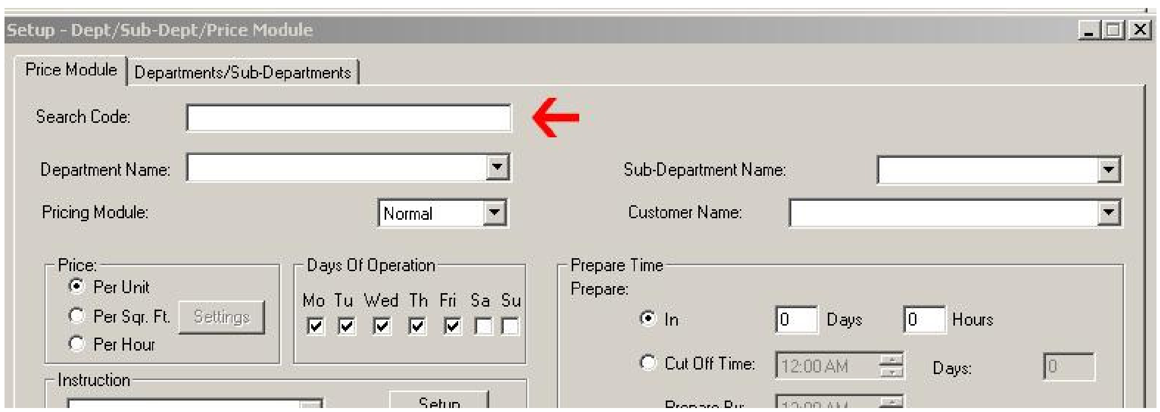
- You may also enter the Order PO Number for referring to the same orders.

- Once you hit <OK>, multiple pay screens will appear sequentially, one for each customer.

Price Setup Screen

New! Lookup Pricing by Product Code

Now there is faster way to get to the desired department and sub-department. If you have a product code on hand, simply enter it in the 'Search Code' field.



If the code is found in the pricing table, the screen will populate automatically showing the desired price code on the top of the grid

Changing All Prices at once

A new button has been added to the Price Setup screen to facilitate, changing of all pricing for displayed price codes using a multiplier factor.

Simply click on the button, choose the multiplier amount and confirm.

Del.	Price Code	Description	Price	Price	Price	Price	Price	Price	Price	Price	Cap
X	CP057	5x7 Custom Print	$10.40	$8.67	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0
X	CP0810	8x10 Custom Print	$13.20	$12.10	$11.00	$9.90	$8.80	$7.70	$6.60	$0.00	0
X	CP1114	11x14 Custom Print	$20.79	$13.86	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0
X	CP1620	16x20 Custom Print	$34.65	$20.79	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0
X	CP2024	20x24 Custom Print	$56.60	$36.96	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0
X	CP2430	24x30 Custom Print	$80.85	$60.06	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0
X	CPW	Wallet Size Custom Pri	$2.20	$2.20	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0

Shipping Module

New! Integration with DHL EasyShip

Following our successful hand-shake with FedEx Ship Manager, and UPS Worldship, we have now added integration with DHL EasyShip program.

When scheduling a job for a standard shipment or drop ship, LabWorks will contain the 'Ship To' information and will transmit it to EasyShip via a barcode printed on the work order.

By scanning that barcode (or simply entering the Ship ID) in EasyShip, the 'Ship To' information will populate. You can then proceed to complete your shipment. Once EasyShip prints the shipping slip, it sends back the tracking number to LabWorks automatically.

To integrate your LabWorks version 8.00 with DHL EasyShip (or FedEx and UPS), please contact Lablogics' Tech Support and schedule a time for that.

The cost of this setup is $250.00

System Options

System ► System Options

This screen contains several options enabling new features of LabWorks. You can fine tune your workflow making them active or inactive as needed.

System Options can be displayed by one or all categories:

System Options :: Customer Service Screen

1) Notify when customer has invoices past these many days:

- You can activate this option by entering a number greater than 0 in the 'Value' field (number of days) and clicking on the 'Active' check box. Once Active, each time a customer is called in the Customer Service screen, a note will popup, notifying the customer service rep that the customer has invoices past due.

2) Create an automatic shipping record for a customer who has a default Shipping Method

- If a customer has a default shipping method in its default shipping address, every time an order is generated, an automatic shipping record will be created. In this case, the CSR does not have to do the extra step of scheduling shipping for this customer's orders.

3) While saving an order notify if a Line Item has a 0 Qty

- Once activated, you will be notified if you're trying to save an order that has at least one line item with a 0 quantity.

4) While saving an order notify if Total is 0.00

- Once activated, you will be notified if you're trying to save an order that has a 0 total.

5) Activate Reference Field Listing in Customer Service Screen

- If activated, every 'Reference' added in the customer service screen will be saved in a database, so it can be recalled for future usage. This option can be mostly used for labs that use a lot of repeat references (i.e. movie titles).

6) When a new line item is added to a Ready order, Do NOT change the status to OPEN

- This option is self explanatory.

7) Activate School Lab denominations

- This option should be activated mostly for Underclass labs that have a DP2 integration module. The filed titles will be altered in customer screen for their purposes.

8) Make ALL orders READY when the Order is Created

- If you activate this option, every order created, including all its line items, will assume the status READY from very beginning. This option is only useful if you do not care about the job tracking features and you want to bypass the job preparation step.

9) Activate Pop-Up Order Additional Notes

- By activating this field, every time an order is edited in the customer service screen, the Additional Notes of that order will pop-up so the user can view them at once. This item is useful if you normally place crucial information regarding the order in that filed.

10) Search Customers also by Internal Reference

- ctivating this option, a customer may be searched by an alpha-numeric code entered in the 'Details' tab of the customer profile. This feature may be used for old customer numbers, coming from an older system.

11) Allow creation of Product Codes on the fly, while taking an order

- This option, when activated, allows the High security customer service personnel to enter codes that do not exist in the existing Pricing. The user must specify a Department and Sub-Department where the code should belong to.

- This code will not be saved in the Pricing System and it will be used only for this order, however, it will show in the historical reports

12) Pop Up number of Unpaid Open and Ready orders

- If activated, every time a customer is called, the count of their 'Open' and 'Ready' orders will show.

13) Do not clear the screen, after updating

- The edited order will remain populated in the customer service screen, once saved.

14) Pop-up Customer original box if empty

- Needs to be activated, , if the CSR is required to make an entry in the 'Customer Original' box, before saving an order.

15) Default number of Barcode Labels to print with each Work Order

- The indicated number of Barcode Labels will be printed, when a work order form is printed.

16) Complete 'Shipment Record' at Invoicing time

- By activating this option, when an order is scheduled to be shipped gets invoiced, the user will be prompted if they would like to complete the shipment record as well. This option is useful only if the order is already prepared to be shipped and a tracking number is in hand.

17) Order Size Description in Inches

- This option is targeted for line items with square foot pricing, where the sized have been entered in 'feet' rather than 'inches'. By activating this option, the inch translation of the size will be inserted in the description of the line item.

18) Popup shipping screen if not selected by user

- This option is useful for reminding the CSR to pay attention to whether the order being saved needs to be shipped or otherwise.

19) Start CS Screen in the PO Number field

- By activating this field, the CS Screen, and Prepare Order Screen (both Individual and Batch) will start in the 'PO Number' field as opposed to the Order ID filed.

System Options :: General

1) US Address Format

2) US Telephone Number Format xxx-xxx-xxxx

3) US Date Format MM/DD/YYYY

4) Canadian Tax System GST/PST

- Activate for Canadian Taxing System

System Options :: LWWA

1) Create a LWWA user every time a customer is created.

- Every time a new customer is added, a LWWA user will be added. The username and password will both be the same as the new assigned LabWorks Customer ID.

System Options :: Prepare Order Screen

1) In the Prepare Order Screen, Make the pricing information invisible

- All of the line item prices will be hidden.

System Options :: Reports

1) Only users with Manager Permission can run Invoice Queries

2) Only users with Manager Permission can run Order Queries

System Options :: ROES

1) Create an Error Log if Customer ID is not found

- If NOT activated, a new customer will be created on the fly, once an order comes in and the customer information is not identified.

2) Automatically Print incoming ROES orders

- A LabWorks Work Order automatically gets printed on the designated printer, once a ROES order comes in.

System Options :: Sales Quotation

1) Ask if Totals should appear at the bottom of the Sales Quotation

- If activated, every time a Sales Quotation form is about to print, LabWorks will ask whether total are to be displayed at the bottom of the quote.

System Options :: Security

1) Only Users with Manager Permission can VOID Orders

2) Only Users with Manager Permission can Change Sales Rep on an Order

3) Low Security CSR can discount an order up to this percentage

- For this option, once activated, you must enter a percentage value in the ‘Value’ column.