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a 22531 parkfield
misión viejo, ca 92692
tf 888.404.0008
t 949.600.5310
f 949.340.6664

LabWorks™ Management System

Version 7.0 Upgrade



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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.exe**, which is the v.7 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.

Important: After Installation...

After every installation of server and/or workstation, it is important to do the following steps:

1. Go to System/Company Information
2. Make sure that the new ‘Location’ field carries the correct location name.
 - If your company has a single location, the name of the location is the same as the Company Name.
 - For companies with multiple locations, you can first enter a name for every location by clicking on the “Locations” button and filling out the information. The “Location Names” will then appear in the drop down list. Every station, can assume the proper location name by choosing it from the drop down list.

The screenshot shows the 'Company Information' window with the following details:

- Company Name:** Lablogics
- Address Information:**
 - Address 1: 22531 Parkfield
 - Address 2: (empty)
 - City: Mission Viejo
 - State: CA
 - Zip: 92692
- Phone:** 949-404-6009
- Alt. Phone:** (empty)
- Fax:** (empty)
- Email:** info@lablogics.com
- Web Site:** www.lablogics.com
- Operation Hours:**

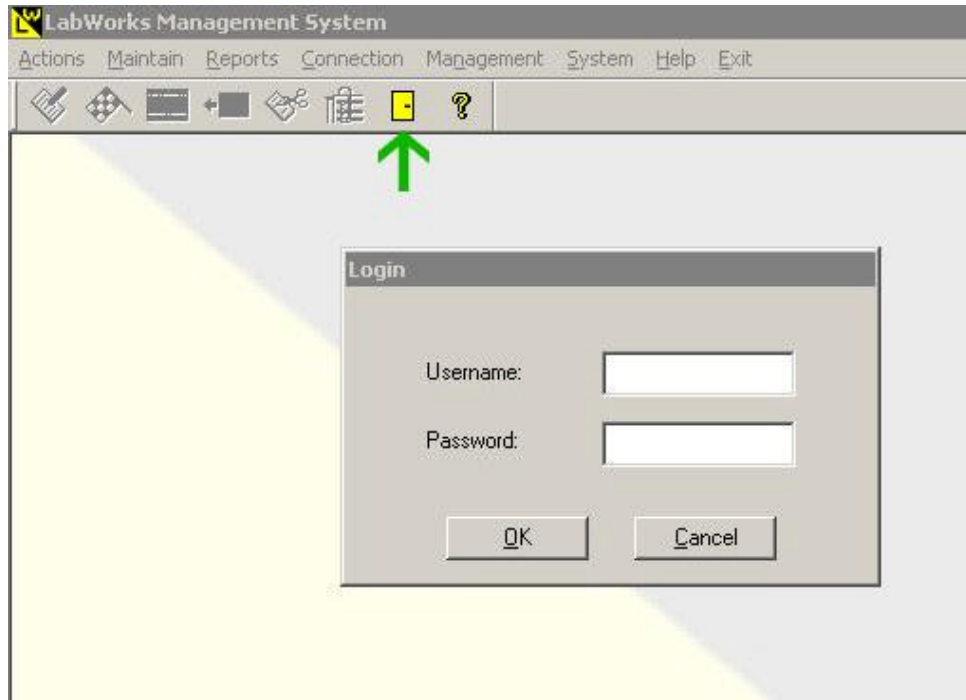
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Opening: 8:00 AM	8:00 AM	8:00 AM	8:00 AM	8:00 AM		
Closing: 5:00 PM	5:00 PM	5:00 PM	5:00 PM	5:00 PM		
- Holidays:**
 - ☐ Martin Luther King
 - ☐ President's Day
 - ☐ Veterans Day
 - ☐ Friday of Thanksgiving
- Use Selected Holidays:** (empty)
- Other Company Information:**
 - Federal Tax Id: (empty)
 - Pseudo Number: (empty)
 - Store No: 100193
- Note:** (empty)
- Location:** District Lab (indicated by a green arrow)
- Buttons:** OK, Cancel, Help, and Locations (indicated by a red arrow)

What's New ?

General Changes

[Fast Login/Logout Icon](#)

The Fast Icon for logging out, has been updated to facilitate login's as well.



[New! Multiple Location Settings](#)

LabWorks versions 4, 5, and 6 were all apt to handle multiple locations. Version 7 has a more versatile and improved multi-store setting screen.

If a company has more than one location, all locations must be specified in System/Company Information screen, under 'Locations' button, each with a unique location name. Then each client or terminal service station should specify the proper location it adheres to.

! Note: The same procedure also needs to be done for a single location setup. However, all stations will indicate the same Location !

New Feature: Each location can now have its own **Default Price Module** which is automatically assigned to customers added at that store.

System :: Automatic Logout

LabWorks can now be instructed to log out of a user session, if it stays inactive for a certain period of time. To activate this feature:

- 1) Go to System/Defaults menu option
- 2) Type in the number of minutes after which LabWorks will automatically log out
- 3) Hit <OK> and save settings.

The image shows a screenshot of the 'Initial System Information' dialog box. The dialog is divided into several sections. The 'Initial ID Numbers' section contains fields for Customer ID (1000), Employee ID (10), Order No. (20000), Invoice No. (500000), and P.O. Number (1). The 'Customer Rating' section contains fields for Initial Customer Rating (20), Minimum Order For Rate Adjustment (\$ 40), Multiplying Factor (%) (5), and Referring Customer Multiplying Factor (%) (2). The 'Finance Charge' section contains fields for Minimum Finance Charge (1.5) and Late Charge (0). The 'Default Sales Tax' section has a dropdown menu set to 'Local'. The 'Defaults' section contains multiple dropdown menus for Pricing Module (Normal), Customer Type, Acquired, Shipping Method, Service Type (Normal), Payment Type, Terms (COD), and Billing Cycle (Monthly). The 'Inactive Log Out Time (in Minutes)' field is highlighted with a green arrow pointing to it from the left and another green arrow pointing away from it to the right. The 'Footer' section contains two text areas for 'Invoice' and 'Statement', both containing the text '*** Thank You for choosing LabWorks ***'. At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.

Initial System Information	
Initial ID Numbers	
Customer ID:	1000
Employee ID:	10
Order No.:	20000
Invoice No.:	500000
P.O. Number:	1
Customer Rating	
Initial Customer Rating:	20
Minimum Order For Rate Adjustment:	\$ 40
Multiplying Factor (%):	5
Referring Customer Multiplying Factor (%):	2
Finance Charge	
Minimum Finance Charge:	1.5
Late Charge:	0
Default Sales Tax	
Tax:	Local
Defaults	
Pricing Module:	Normal
Customer Type:	
Acquired:	
Shipping Method:	
Service Type:	Normal
Payment Type:	
Terms:	COD
Billing Cycle:	Monthly
Footer	
Invoice:	*** Thank You for choosing LabWorks ***
Statement:	*** Thank You for choosing LabWorks ***

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Contacting Lablogics Tech Support:: GoToMeeting Sessions

For some time now, GoToMeeting has been Lablogics’ preferred way of connecting to customer stations for Tech Support, Trouble Shooting, and Training purposes. A ‘Contact Lablogics’ option has been added to the Help menu.

Simply enter the meeting id provided by our tech support in the ‘Enter Meeting ID’ field, when needed. Follow the instruction and the connection will be automatically established.

Customer Service Screen



Customer Search :: Selected Customer List by Type

A new ‘Customer Type’ field has been added to the Customer Search area. For installations which have an extensive customer list, you may select customers by their assigned types.

Pushing Line Items Down

A new **Down Arrow** button has been added at the bottom of the customer service and quotation screens. It is used to push order line items down.

Voiding Orders

Each time an order gets voided, a Notes box pops up, encouraging the user to explain the reason why the order was voided. These notes will be appended to the Order Notes for future viewing purposes.

Customer Profile Screen

Multiple Credit Cards on file

Version 7 allows for multiple credit cards to be stored on file.

- Go to the Edit Customer screen
- Select “Details” Tab
- Click on the “ADD” button placed in the Credit Card number section and you can enter multiple card numbers for each customer.

The screenshot shows the 'Edit Customer' dialog box with the 'Details' tab selected. The 'Credit Cards' section is highlighted with a blue arrow, and the 'Add' button is highlighted with a red arrow. A 'Credit Cards' sub-dialog is open, showing a list of credit cards for 'Lablogics, Inc.' with fields for 'Credit card' and 'Exp.'.

Edit Customer

General Details **LWWA**

Customer Name: Lablogics, Inc. Customer ID: 1001

Terms: Net

Other Information

C/C On File: 371275039983005

Exp: 0107

Net Account:

Net Due In (Days): 30

Discount In (Days): 0

Discount %: 0

Credit Limit:

Monthly Finance Charge %: 0

Monthly Late Charge:

Billing Cycle: Monthly

Customer Rating: 2852

Customer Credits: 50.65

Credit Cards

Lablogics, Inc.

Credit card: 371275039983005

Exp: 0107

Buttons: OK, Cancel, Add New, Delete, Help

Navigation: Previous, Next, OK, Cancel, New Customer, Help

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With the **LabWorks Credit Card Processing Module**, a list of all credit cards will be available in all payment and refund screens in the form of a drop down field. For security purposes , only the last 4 digits of every card are visible.

EOM Terms

Joining ‘COD’ and ‘Net’ customer terms, new ‘EOM’ (End of Month) terms have been added for accommodating customers that need to receive invoice due dates, days after the end of the current month.

The screenshot shows the 'Add New Customer' window with the 'LWWA' tab selected. The 'Terms' dropdown menu is set to 'EOM', indicated by a red arrow. The 'Net Account' section includes fields for 'Net Due In (Days)' (30), 'Discount In (Days)' (0), 'Discount %' (0), 'Credit Limit' (0), and 'Monthly Finance Charge %' (1.5). The 'Other Information' section contains checkboxes for 'C/C On File', 'Exp', 'Resale #', 'Open PO', 'Sales Tax', 'Retail Price Module', 'PO Required', 'Print Individual Invoice', 'Contact Required for C', and 'Automatic Email Notific'.

The above example would indicate 30 days (1 month) after the end of the current month.

LWWA Tab

A new **LWWA** TAB has been added to the Customer Profile screen. This Tab will only appear for customers who are using the LabWorks Web Access Module.

This tab facilitates setting up online customers with a user name and password, so they can login to their Web Access account through LWWA.

The screenshot shows the 'Edit Customer' window with the 'LWWA' tab selected, indicated by a red arrow. The 'Web Users' section contains a table with the following data:

Del	User Name	Password	Security Level
X	lablogics	guest	High
X			
X			
X			
X			
X			

Order Preparation



Prepare Order Screen :: Individual

LabWorks integration modules with on-line order entry systems such as ROES, LabPrints and SimplePhoto, allow for an original order number generated by these software systems to populate the PO NUMBER field in LabWorks work orders.

This screen has now been modified, for the purpose of letting an order get prepared without having to retrieve the LabWorks Order ID Number. This way an order can be found using the PO Number field.

Also additional information such as Customer Name and Order Reference are now displayed at the top for easier identification of the order.

Inst	Code	Description	Service	Quantity	Each	Unit Price	Total	Technician	Ready
				0	0	\$0.00	\$0.00		<input type="checkbox"/>
				0	0	\$0.00	\$0.00		<input type="checkbox"/>
				0	0	\$0.00	\$0.00		<input type="checkbox"/>
				0	0	\$0.00	\$0.00		<input type="checkbox"/>
				0	0	\$0.00	\$0.00		<input type="checkbox"/>
				0	0	\$0.00	\$0.00		<input type="checkbox"/>

Prepare Order Screen :: Batch

A new check box “Select by PO number” has been placed in this screen. Once checked, in place of Order ID numbers, PO Numbers are expected.

Also there are 2 new fields: Department and Sub-Department:

- By not selecting a Department and/or a Sub-Department, the operation stays the same as it was in version 6.

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- In the case where a specific Department and/or a Sub-Department is selected, if an order gets scanned or entered, only line items that belong to that department or sub-department will be made ready and the rest of the line items will remain unchanged.

This feature can mostly be used for technicians who would have continuous access to a LabWorks stations for preparing their own jobs.

Order Batch Prepare

Technician:

Department: ☐ Select by PO number

Sub-Department:

Del	Order #	Name	Total
X			\$0.00
X			\$0.00
X			\$0.00
X			\$0.00
X			\$0.00
X			\$0.00
X			\$0.00
X			\$0.00

OK Clear Table Cancel Help

Sales Quotation Screen



A new **Fast icon** has been added to facilitate accessing Sales Quotation Screen

The screen is now painted with green color headers to avoid confusion with the Customer Service screen.

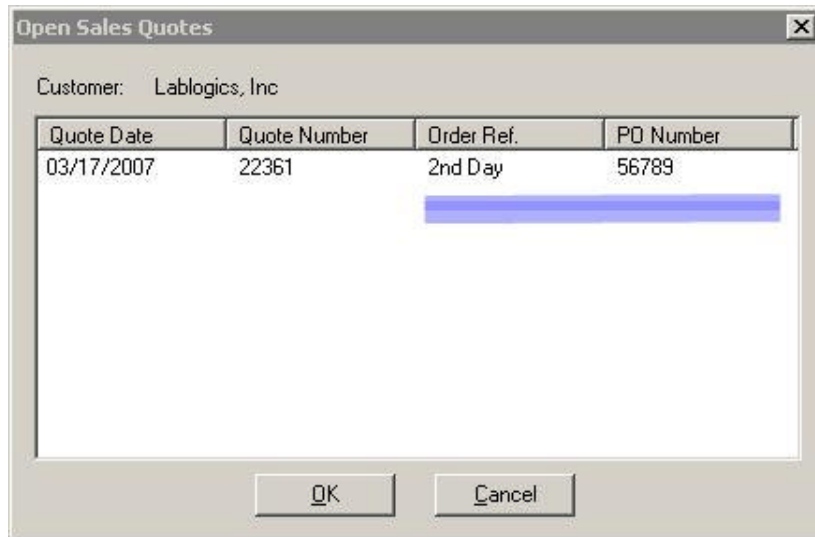
[Sales Quotation Screen :: General changes](#)

Sales Quotation screen is now opened to the 'Low' level security customer service and sales representatives.

Also, it no longer requires that a Sales Rep must be specified.

Changing Quotes into Orders

When viewing list of sales quotes in the Customer Service screen, there are now more details available to help choose the appropriate Sales Quotations, namely: Reference and PO Number



Open Sales Quotes

Customer: Lablogics, Inc

Quote Date	Quote Number	Order Ref.	PO Number
03/17/2007	22361	2nd Day	56789

OK Cancel

Price Setup Screen

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.



☒ Publish to Website ☐ DP2
☒ Taxable ☒ Discount
☐ Consecutive Link: 1 9 19 49 99 199 999 0

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	CP0610	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	\$80.05	\$60.06	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0
X	CPw/	Wallet Size Custom P	\$2.20	\$2.20	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0

OK Delete Change All Prices Production Files Cancel

Production Detail Information File

For certain processes, you may need to maintain detailed production information so future duplicated jobs can be accurately replicated.

To accommodate this, a new button “Production Files” has been added to Setup Pricing screen. You may create specific MS Word, or editable PDF files that can be attached to a sub-department. These are empty templates which will be called each time a line item within the selected sub-department is prepared. The preparer will proceed to fill out the template with detail information about the production on hand. The production file is then renamed and will accompany the order for future usage. The production file can be edited or viewed by loading the order in the Customer Service screen and by clicking on Production file in the Instructions pop-up:

- 1) Create a template as a Word or PDF document and save it.

Date: _____ Operator: _____ Material: _____

Rip Software: _____ Tiles: _____ overlap _____

Resolution: ☐ 182 x 182 ☐ 362 x 362 ☐ 423 x 600 ☐ 564 x 600

Proof ☐ File Format: ☐ Tiff ☐ EPS ☐ Postscript

Rip File Names & Locations _____

Curves, Color Replacement or Filter Name & Location: _____

Color Adjustments: _____

- 2) Attach it to a sub-department in the Setup Pricing screen.

Setup - Dept/Sub-Dept/Price Module

Price Module: Department/Sub-Department

Department Name: 07 Large Format Printing Sub-Department Name: 01 Inkjet Prints

Pricing Module: Normal Customer Name: _____

Price: ☐ Per Unit ☐ Per Sq. Ft. ☐ Per Hour

Days of Operation: No Tu Wed Th Fri Sa Su

Prepare Time: Prepare: ☐ In ☐ Out

Prepare By: 12:00 AM

Publication: ☒ Publish to Website ☐ DP2 ☒ To Table ☒ Discount

Del	Price Code	Description	Price	Price	Price	Price	Price	Price	Price	Price	Cap.
X	HP	HP2000 Inkjet Print	\$8.50	\$7.50	\$6.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	10
X	HP2	HP 5000 Watercolor	\$10.50	\$7.50	\$6.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	5

Buttons: OK, Delete, Change All Prices, 01InkjetPrints.pdf, Cancel

- 3) When making line items ready from this sub-department, the template will pop up.
- 4) User will enter the detailed information and save the file
- 5) Any time in the future, the order can be edited, and the information can be viewed from the Instructions screen.

< Ready > Order - Entered by < Alex Rowat > - on 03/28/2007 - Last Updated by < Alex Rowat >

Customer Information
 Customer ID: 1001
 Lablogic, Inc.
 22511 Parkfield
 Suite 220
 Mission Viejo, CA 92692
 Tel: 310-517-8171 Fax: 310-517-8105

Order/Invoice
 Order No: 22383
 Invoice No:
 Schedule Shipping/Delivery

Order Information
 Order By: Farah Rowat
 Order For:
 Charge R:
 Bag W/PD:
 Reference:
 Sales Rep: John Foster

Instructions
 Status: Completed on 03/28/2007 at 07:25 pm by Alex Rowat

72.50
 7.25
 0.00
 65.25
 0.00

Del Inst	Stock	Code	Qty	Unit	Price	Total	Spill	Task
X	HP	3					1	
X	FB810	8					1	
X								
X								
			0	0	\$0.00	\$0.00		
			0	0	\$0.00	\$0.00		

OK Cancel 22383_3149.pdf

New Order Pickup Customer Originals Additional Notes Void Save Print Help Close

Batch Invoice Screen

Batch Invoice Screen Enhancement

The Batch Invoice Screen is now modified to accept PO Numbers (i.e. ROES, LabPrints, SimplePhoto,... numbers), as well as LabWorks Order ID numbers.

Also, it can now handle invoices for multiple customers at one time.

It has a new “Order Search” screen that can facilitate finding a multitude of orders for invoicing purposes.

The screenshot shows the 'Batch Invoice' window. At the top, there's a 'Totals' section with the following values:

Sub Total:	0.00
Discount:	0.00
Tax:	0.00
Grand Total:	0.00

Below the totals, there is a checkbox labeled 'Select by PO Number' with a red arrow pointing to it.

The main part of the screen is a table with the following columns: Del, Order #, Customer, and Total. The table contains 15 rows, all with '0' in the Order # column and '\$0.00' in the Total column. A green arrow points to the Customer column header, and another green arrow points to the Total column header.

At the bottom of the window, there are three buttons: 'Pay', 'Cancel', and 'Order Search'.

New! Vendor Information

Vendor information can now be added and maintained in Maintain/Vendors menu option.

This will facilitate creation of Purchase Orders and receiving inventory items , while maintaining the cost, average cost, and last purchase prices.

The screenshot shows a 'Vendor' dialog box with the following fields and sections:

- Vendor Name:** Eastman Kodak
- Vendor ID:** 1
- Address Information:**
 - Address 1:** 22535 Main Street
 - Address 2:** Suite 2003
 - City:** Garden Grove
 - State:** CA
 - Zip:** 91788
- Vendor Terms:**
 - Terms:** Net (dropdown menu)
 - Net Due (Day of Month):** 0
 - Net Due In (Days):** 30
 - Discount In (Days):** 10
 - Discount %:** 2
 - Credit Limit:** 0
- Contact Information:**
 - Account No:** 123456789-00
 - Contact:** John Johnson
 - Phone:** 310-222-3333
 - Alt. Contact:** (empty)
 - Alt. Phone:** (empty)
 - Fax:** 310-222-3334
 - Email:** john@kodak.com
 - Web Site:** www.kodak.com
- Notes:** (empty text area)
- ☒ Active
- Buttons:** OK, New Vendor, Cancel, Help

New! Purchase Orders

New screen to allow for creation of Purchase Orders to be submitted to inventory vendors. To access this option, go to Actions / Purchase Order / Purchase Order Option.

The inventory in these purchase orders can also be easily received in one operation. When they arrive just use the Receive Items option and they're automatically entered to inventory.

Purchase Order

Vendor Name: Date: P.O. Number:

Shipping Information

Name: Good Thru: Terms: Net 30, 2% in 10 Day

Address 1: Status: **OPEN**

Address 2:

City: Notes:

State: Zip:

Shipping Method:

Del	Inst	Hstry	Srch	Item Code/ Service	Description	CatalogNo	Units Per Item	Minimum Order	Quantity	Price
<input checked="" type="checkbox"/>				023602605282	Pioneer 3DLB 3D Black Letters	44444	1	5	10	\$7.00
<input checked="" type="checkbox"/>							0	0	0	\$0.00
<input checked="" type="checkbox"/>							0	0	0	\$0.00
<input checked="" type="checkbox"/>							0	0	0	\$0.00
<input checked="" type="checkbox"/>							0	0	0	\$0.00
<input checked="" type="checkbox"/>							0	0	0	\$0.00

☐ Taxable Total: 70.00

New! Receive Items

This option can be accessed by going to the Actions / Purchase Order / Receive Items menu option. The following tasks may be done here:

- Receiving a pre-existing Purchase Order: Simply enter the vendor name. You will be prompted for any existing purchase order for that vendor. It can be opened and then received into inventory.
- Receiving new items on the fly: Simply enter the vendor name, the received items, qty and the price and save.
- In case of items with required serial numbers, LabWorks will automatically prompt for the serial numbers to be entered.

Del	Hstry	Stck	Item Code	Expense Account	Description	Qty	Amount
X							
X							
X							
X							
X							
X							

Inventory Module

Menu options and screens have been modified and new screens have been introduced to provide customers with a versatile and efficient Inventory Module.

[Inventory :: Category Setup](#)

- While setting up a new, or editing an existing category in the Inventory Setup screen, a new 'Consumable' check box can be selected. If checked the category and all its contents will not appear in the Customer Service screen search boxes.



This screen has been modified and improved extensively:

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location. Each location needs to be specified in System/Company Info option.

- The new Sign Off button allows for signing off consumable and non-consumable inventory items for internal use.
- An Inventory Item can be assigned to one or more 'Vendors' for future ordering and receiving of items. See the new feature: Purchase Orders!

[Inventory :: Batch Operations](#)

For faster and more efficient inventory operations, new screens have been created:

- Adjust Qty in Batch
- Adjust Value in Batch
- Sign Off in Batch

All of these options are available in Maintain/Inventory menu option and they are best used when the item codes are available in the form of barcodes.

[Inventory :: Tracking Serial Numbers](#)

Serial Numbers can now be tracked for desired items. Simply go to:
Maintain/Inventory/Enter Serial numbers

Enter or scan the barcode of the desired item code. Serial #'s can be entered for each available item in stock.

Once serial numbers are entered for an item, LabWorks will expect proper Serial # operations for that specific item. For example, when inventory is received, the operator will be prompted to enter serial numbers. When selling the same items, the CSR will be prompted likewise. At all times, a list of existing serial numbers will be available for users to choose from.

Store	Qty
Main St	0
Main Street	3
District Lab	2

New! Shipping Module

LabWorks shipping capabilities have been enhanced for a more shipping-friendly environment. Of course, it can be used just as it was previously, but now has more flexibility in the shipping preparation fields.

If you are in need of a faster and more automated shipping, LabWorks now offers a new Volume Shipping Module

To take advantage of this, there is only a setup fee of \$350.00 to prepare and customize your forms, and prepare your customized database connection with your carrier of choice.

Currently LabWorks can be linked to UPS WorldShip, and FedEx Ship Manager, and other third party shipping software that provide an ODBC database interface.

New Shipment Scheduling Screen

This screen has been modified to accommodate more shipping fields. It has the standard feature of looking up customer's default shipping address, but it also memorizes previous shipments in a chronological order.

Customer Name: Lablogics, Inc Status: Scheduled

TO FROM

Shipping/Delivery Information

Company Name: Lablogics, Inc Contact: Farah Ravari

Address 1: 22531 Parkfield Phone: 310-517-9171 Ext:

Address 2: Suite 500 Email: farah@lablogics.com

City: Mission Viejo Field 1:

State/Province: CA Zip: 92692 Field 2:

Country:

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Automatic shipping records can be created for new orders, if the customer carries preferred shipping method. Examples of shipping methods are:

UPS Next Day Air

UPS 2nd Day Air

UPS 3 Day Select

FedEx Priority Over Night

FedEx 3 Day Saver

...

Schedule a Shipping/Delivery

Customer Name: Lablogics, Inc Status: Scheduled

TO FROM

Shipping/Delivery Information

Company Name: Lablogics, Inc Contact: Farah Ravari

Address 1: 22531 Parkfield Phone: 310-517-9171 Ext:

Address 2: Suite 500 Email: farah@lablogics.com

City: Mission Viejo Field 1:

State/Province: CA Zip: 92692 Field 2:

Country:

< >

Shipping/Delivery Instruction

☐ None

☐ Deliver

☒ Ship

Shipping Method: UPS

Shipping Number:

Tracking Number:

☐ Will Call Bin

Ship/Delivery Date: 3/31/2007

Ship/Delivery Time: 12:38 PM

Shipping/Delivery Instructions:

Print Shipping Label

Print Packaging Slip

OK Edit Clear Delete Cancel Help

Customized Forms

- Work Order will include a Shipment ID Barcode
- Invoice will include a Shipment ID Barcode
- Shipping Labels
- Packing Slip (Shipping Slip)

Tracking Number Write Back

In most properly setup systems, the shipping carrier's software or your third party software will write back the tracking number to LabWorks Shipping Record's tracking number field for future reference and customer queries.

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Reports

[Sales Quote Query](#)

The orientation has now been changed to landscape for allowing additional information.

[Order :: Query](#)

A new 'Terms' select box has been added to the other selection criteria.

[New! Shipping/Delivery :: Shipped Order by Customer](#)

This is a new report to list shipped orders for one or more customers in a specific date range.

[Accounts Receivable :: Customer Payments](#)

An Authorization Code column is now added to show credit card authorization numbers. Data will be available only if LabWorks Credit Card Processing module is activated.

[Accounts Receivable :: Detailed Aging Report](#)

Detailed information such as Telephone Number, Fax Number and Credit Limit has been added to each customer's header section.

This report, as well as Summary Aging Report, can now be run by different Terms.

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
- By activating 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.

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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.

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.