KEY POINTS

- **SESSIONS** always involve the camera! Any other meeting is an **APPOINTMENT** (linked or unlinked).
- **SESSION-BASED INVOICES** are always created from the session record and invoice type may be *Session Fee*, *Initial Order*, or *Re-Order*.
- **CLIENT-BASED INVOICES** are always created from the client record when there is no session. Invoice type will be *Generic*.
- **CREDIT MEMOS** and **ESTIMATES** may be created from either client- or session-based invoices.

KEYBOARD SHORTCUTS

F1 = *Help*
F2 = *Home*
F3 = *Workflow**
F4 = *Calendar*
F5 = *Clients*
F6 = *Sessions*
F7 = *Invoices*
F8 = *Phone Calls*
F9 = *Production*
Ctrl+D = *ToDo*
Ctrl+I = *Quick Sale*
Ctrl+L = *Client Search*
Ctrl+N = *Save & New*
Ctrl+S = *Save*
Ctrl+T = *Time stamp, Time clock*
Ctrl+U = *Change User*
Ctrl+W = *Save & Close*
ALT = *Displays shortcuts from within any record*

*** *While adding a client,* ***F3*** *is used to prevent auto-capitalization.*

StudioPlus™

Focused on your success

HOW DO I...

ENTER A NEW CLIENT? From any browse screen, click File, New, Client, or press Ctrl+N. You can also enter a new client on-the-fly as you're creating a new appointment or session, and as you're changing a Bill-To person on an invoice. Client records may also be imported.

FIND AN EXISTING CLIENT? From any browse screen, use Ctrl+L or click File, Client Search**.** Or change to the Client Browse Screen and enter a selection criteria at the top right of the screen.

ENTER A NEW SESSION OR APPOINTMENT? From the Calendar Browse Screen, double click on the desired date & time to launch the Schedule Wizard. Or, from any browse screen, use Ctrl+P, or click File, New, Appointment or Session. Or from inside a client record, click the New Session Icon.

FIND AN EXISTING SESSION? From any browse screen, click File, Session Search, or use Ctrl+S. Or, locate the client, double-click to open the Client Info screen and select the Sessions tab. You can also find a session from a related invoice, the calendar, and from the Sessions Browse screen.

CREATE A NEW INVOICE? Find the session that the invoice is related to by using the steps described above and double–click to open the Session Info screen. Click the *Session Invoice* button in the 'New' section of the tool bar ribbon. You can also create a new invoice by beginning a new sales presentation from inside the client, session, or from Workflow. If there is no session, as in the case of a Copy & Restoration job, then you can create an invoice directly from inside the client record.

FIND AN EXISTING INVOICE? If you know the invoice number, switch to the Invoice Browse Screen. Enter the invoice number in the Search field at the top of the screen. Or, locate the client or the session record and from inside the Client or Session Information screen, click on the Invoices tab.

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 or Refund button on the tool bar ribbon.

APPLY CLIENT DEPOSIT TO AN INVOICE? When you click Add a New Payment StudioPlus will automatically offer to apply any outstanding Client Deposits.

TRANSFER A CREDIT BALANCE? Open the invoice with the credit balance and click File, Transfer Credit Balance. You'll be prompted to select which invoice to apply the credit balance to.

BASIC STEPS

With or Without Digital Presentation — Follow Steps 1-3

#1 ADD CLIENT - From any browse screen, click File, New Client, or click New Client on the Toolbar ribbon, or use Ctrl+N. *You may choose to skip this step and add the client later as you create the session or appointment with the Schedule Wizard!*

#2 BOOK SESSION - Open the Calendar of the photographer you are scheduling. Double-click date and time to launch the Schedule Wizard. In Schedule Wizard create your Session, Session Fee Invoice, and other future appointment(s). Or, you may also open a client record and create a new session with or without the wizard.

#3 CREATE INVOICE - Create a Session Fee Invoice in the Scheduling Wizard as you're creating the session. You may also create the Session Fee Invoice from the Session Information Screen. Open the information screen by double-clicking on the Session from the Session Browse Screen, from inside the Client record, or from the Calendar. On the Session Information Screen, Click on New Invoice icon on the toolbar to create your new Session Fee, Initial Order, or Print Order Invoice.

WITH Digital Presentation — Continue with Steps 4-6

#4 CHECK IN - When the client arrives for their session, double-click the Session on the Calendar to open the Session Information Screen. First, verify their client, session, and invoice information. Then, advance the Session Status to Capture Images Pending.

#5 CAPTURE- Go to Workflow and select the Capture button. Click once to select the Session from the list. Then click the Import Images icon. When prompted, advance the status to Sales Presentation Pending. *(Using Workflow to capture images is advised, but not required. You can also import directly into the session record.)*

#6 DIGITAL PRESENTATION - Go to Workflow and click Present to get to the Presentation screen. Prepare the images for your client. Then click the Start a Sales Presentation button (on the drop-down toolbar at the top of the Sales Presentation Screen) to begin slideshow. The Show Order Info button is also on the drop-down toolbar at the top of the screen. *(Using Workflow to give your sales presentation is advised, but not required. You can also begin a sales presentation from inside the client or session record.)*