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 the 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. The invoice type will be *Generic*.
- **CREDIT MEMOS** and **ESTIMATES** may be created from either client- or session-based invoices.

DESKTOP SHORTCUTS

F1 = *Help*
F2 = *Home*
F3 = *Workflow**
F4 = *Calendar*
F5 = *Clients*
F6 = *Sessions*
F7 = *Invoices*
F8 = *Phone Calls*
F9 = *Messages*
F11 = *Tasks*
F12 = *Production*

Ctrl+D = *New Task*
Ctrl+E = *New Email*
Ctrl+I = *New Quick Sale*
Ctrl+L = *Client Search*
Ctrl+M = *New SMS Text Message*
Ctrl+N = *New Client*
Ctrl+P = *New Appointment/Session*
Ctrl+S = *Session Search*
Ctrl+T = *Time stamp, Time clock*
Ctrl+U = *Change User*
Ctrl+W = *Save & Close*
ALT = *Displays shortcuts in record*

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

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QUICK REFERENCE

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HOW DO I...

ENTER A NEW CLIENT? From anywhere in the software, click **File > New > Client** (or Ctrl+N). Or, from most hubs, just click **Client** on the **New** group of the ribbon. You can also enter a new client on-the-fly as you create a new appointment or session, as well as when you change the "Bill-To" person on an invoice. Client records can also be imported using the **Import Clients** utility.

FIND AN EXISTING CLIENT? Open the **Clients** hub and enter your selection criteria in the **Search** group of the ribbon. Or, from anywhere in the software, click **File > Client Search** (or Ctrl+L).

ENTER A NEW SESSION OR APPOINTMENT? Double-click on the desired date and time on the calendar to launch the **Scheduling Wizard**. Or, from anywhere in the software, click **File > New > Appointment/Session** (or Ctrl+P). From inside a client record, click either **Appointment** or **Session** on the **New** group of the ribbon.

FIND AN EXISTING SESSION? Locate the session on the calendar or open the **Sessions** hub and enter your search criteria in the **Search** group of the ribbon. Or, from anywhere in the software, click **File > Session Search** (or Ctrl+S). Another option is to find and open a client or invoice, and then select the **Sessions** tab.

CREATE A NEW INVOICE? Find the session that the invoice is related to by using the options described above and then double-click to open the session. Click **Session Invoice** on the **New** group of the ribbon. You can also create a new invoice by beginning a new sales presentation from an open client, an open session, or from the **Workflow** hub. If a purchase is not related to a session, as in the case of an a la carte frame purchase, you can create an invoice directly from the client record.

FIND AN EXISTING INVOICE? If you know the invoice number, open the **Invoices** hub and enter the invoice number in the **Search** field at the top of the screen. Or, find and open the client or session and click on the **Invoices** tab.

ENTER A PAYMENT? Use the options above to find the invoice for which the payment is being received. Open the invoice and click **Payment or Refund** on the **New** group of the ribbon.

APPLY CLIENT DEPOSIT TO AN INVOICE? When you click **Payment or Refund**, Spectra will automatically offer to apply any outstanding client deposits.

TRANSFER A CREDIT BALANCE? Open the invoice with the credit balance. Open the **File** menu in the upper left corner of the invoice and select **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 hub, click **File > New Client**, or click **Client** on **New** group of the 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 **Scheduling Wizard**!*

#2 BOOK SESSION - Open the calendar for the photographer you are scheduling. Double-click the date and time to launch the **Scheduling Wizard** to create your session, session fee invoice, and additional future appointment(s). Or, you may open a client record and click **New Session** on the ribbon to create a new session (with or without the wizard).

#3 CREATE INVOICE - Create a session fee invoice in the **Scheduling Wizard** as you create the session. You may also create the session fee invoice from the session record. Open the session by double-clicking on it from the **Sessions** hub, from the **Sessions** tab of the client record, or from the calendar. From the open session, click **Session Invoice** on the **New** group of the ribbon 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 it. First verify the client, session, and invoice information. Then advance the session status to "Capture Images Pending."

#5 CAPTURE IMAGES - Go to the **Workflow** hub and select the **Capture Images** stage from the drop-down list. Click once to select the session from the list and then click **Import Images** on the ribbon. When prompted, advance the status to "Sales Presentation Pending." *(Using the **Workflow** hub to import images is advised, but not required. You can also import images directly into an open session using the **Action** tab on the ribbon.)*

#6 DIGITAL PRESENTATION - Open the **Present Images** workflow stage and select the session from the list. Prepare the images for your client. Then click **Start Presentation** to begin the sales presentation. The **Order Info** button is also on the drop-down toolbar that appears at the top of the screen. *(Using the **Workflow** hub to give a sales presentation is advised, but not required. You can also begin a sales presentation from an open session record.)*