About StudioCloud

If you are using StudioCloud business management system, you can directly interact with StudioCloud from within ProSelect.

All interaction is between ProSelect and the StudioCloud Servers, so if you are using StudioCloud on multiple workstations you can synchronize data from ProSelect to all of your StudioCloud workstations.

This first integration release provides the following functionality with StudioCloud:

- Link a ProSelect Album to a StudioCloud Event
- Link StudioCloud clients to existing ProSelect Clients
- Add a ProSelect Client from a StudioCloud Client
- Create a new StudioCloud client from a ProSelect Client
- Create/Update StudioCloud invoices from ProSelect Orders
- Transfer any payments recorded in ProSelect to StudioCloud
- Sync payments made in StudioCloud with those in ProSelect
- Create, and pre-populate with images and client details, a new ProSelect album from StudioCloud

About StudioCloud

StudioCloud is a FREE, easy-to-use, business management software that works on both Mac and Windows and includes free cloud services.

StudioCloud provides an integrated system including Cloud Syncing, Client Management, Scheduling, Point-of-Sale, Bookkeeping, Reporting, Marketing Campaigns, Project/Event/Order Management and much more!

The free version of StudioCloud even provides mobility for one user by syncing all of your StudioCloud data between the cloud, or online server, and all of your internet enabled devices.

With the integration of direct StudioCloud integration into ProSelect you can now add business management, for one user, to ProSelect for free.

As your business grows, you can subscribe to add more features, services and workstations to StudioCloud as needed.

For more information about StudioCloud go to www.StudioCloud.com.

Internet Access

Since ProSelect interacts directly with your account on the StudioCloud server, your computer needs internet access for all operations with StudioCloud.

However, if your computer is temporarily not connected to the internet, you can still work with ProSelect the usual way and later on link your ProSelect Album and Clients to StudioCloud, then export any orders.

Contents:

Get a StudioCloud Account

If you don't already have StudioCloud on your computer, go to the StudioCloud website, create an account (this is free) and download the software onto your computer.

Enabling Integration in ProSelect

To turn on StudioCloud integration check the *Enable Studio Management Integration* checkbox in <u>Preferences (General Settings: Integration tab)</u>. Then enter your *StudioCloud Access Credentials* and click the *Verify Now* button. You should see the message below:
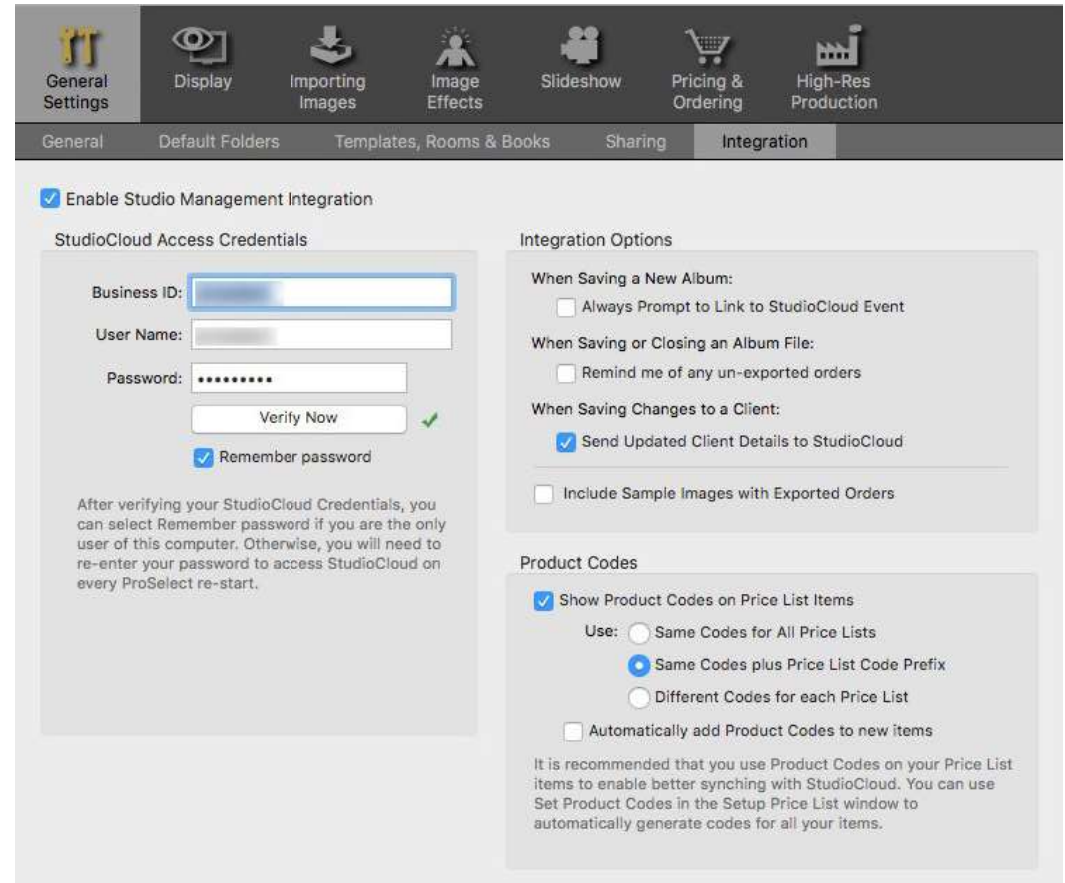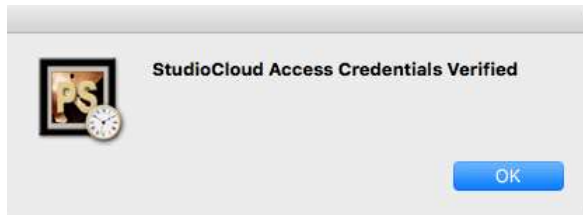
Should I check the Remember Password box?

If you are the only person who uses this computer, the checking this box will save your StudioCloud password securely on your computer (in ProSelect's local preferences. This will save you from needing to re-enter it everytime you wish to access StudioCloud from within ProSelect.

If you are sharing your computer then best not to select this unless you are happy for each user of the machine to use the same username and password for StudioCloud access. In this case, you won't be able to track who made any changes in StudioCloud.

Contents: <u>C1</u> <u>C2</u> <u>C3</u> <u>C4</u>

Integration Options

In the Preferences, you can control how the integration works between ProSelect and StudioCloud to suit your business. These options include:

When Saving a New Album:
 Always prompt to link to StudioCloud

   If the majority of the ProSelect Albums that you are creating need to be linked to StudioCloud Events then selecting this option will have ProSelect prompt you to link any newly created albums the first time that you save them.

When Saving or Closing an Album file:
 *Remind me of any unexported orders*

   Reminds you to export or update to StudioCloud any new or updated orders or payments.

When Saving Changes to a Client:
 Send Updated Client Details to StudioCloud.

   Any changes that you make to a client (in the Clients Setup window) will be immediately updated in StudioCloud

Include Sample Images with Exported Orders

   Turn this on to send ordered image thumbnails to StudioCloud.
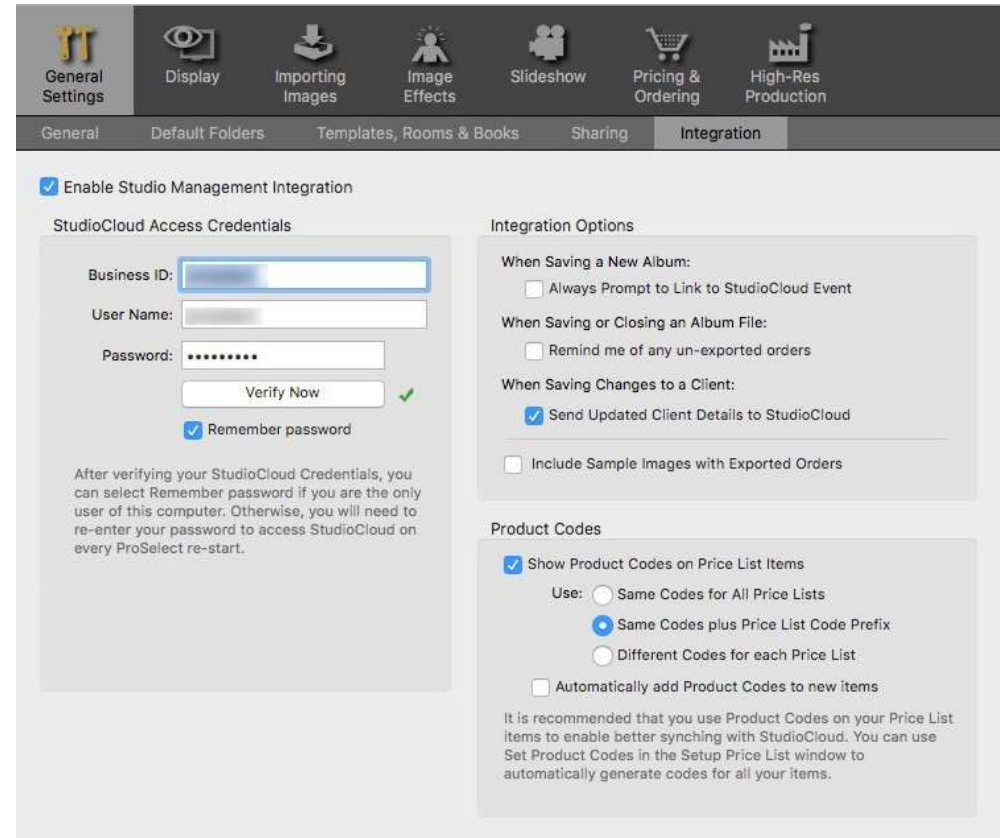
Product codes section

This section is a copy of the Preferences Options under Pricing & Ordering: Settings: Product codes. See Using Product Codes.

It is recommend that you select have Product codes enabled and set to **Same Codes plus Price List Code Prefix** when using StudioCloud as this will allow correct matching of products in the two systems.

Contents: C1   C2   C3   C4

ProSelect provides a great deal of flexibility on how you use the StudioCloud integration. As mentioned earlier, the order of operations is not critical.

However, to be able to export any orders that you have recorded in ProSelect, **both** the Album and the Client (which the orders are recorded against) must be linked to StudioCloud.

The easiest way to do this is to setup the links whenever you are creating a new album. (Setting your Preferences (General Settings: Integration) to remind you to do this when you first save the album is a good option.)

In this case, the steps would be:

1. Start a new Album

2. Import your session images

3. Save the album

4. Using the Link to StudioCloud window, select a *StudioCloud client* and related *StudioCloud event* to link to (this can automatically populate the first Client with the selected clients details)

5. Add any additional Clients from Studio Cloud clients

6. Run your Sales session and record all orders and payments

7. Export the Order(s) to StudioCloud

Handling updates

If you later amend any orders, change any Client details, or record any additional payments (or refunds) the you can send those updated changes to StudioCloud by

1. Re-Exporting the order(s) - this will replace the existing order in Studio-Cloud and/or

2. Syncing your Clients with StudioCloud.

3. Syncing Payments with StudioCloud

Linking an Album

If you have selected *When Saving a New Album: Always prompt to link to StudioCloud* in Preferences (General Settings: Integration) then the dialog window shown on the right will appear when you do your first Save.

Link to StudioCloud...

Alternatively, you can use *Link to StudioCloud* (File Menu) to show this window.

Step 1: Find a Client

If you have already added a name to the first client it will be displayed in the Search Box.

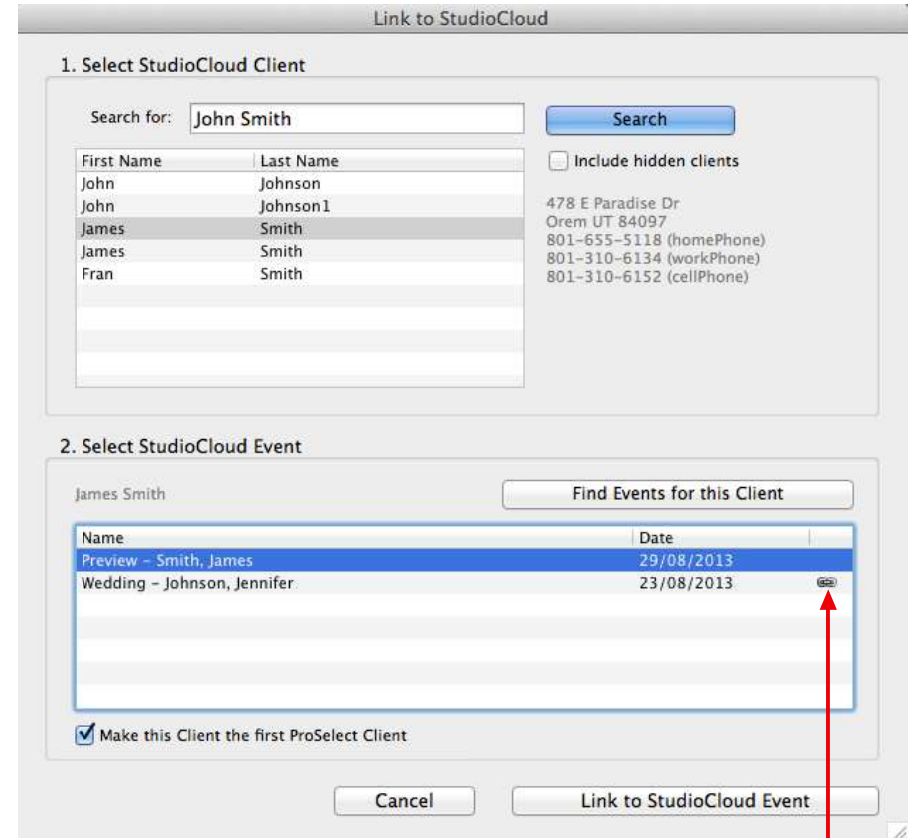Click the *Search* button to find all StudioCloud clients which match either the first **or** last name entered.

Step 2: Select an Event

After selecting a StudioCloud Client you can use the *Find Events for this Client* button to get all events. Select the event to link to, then click the *Link to StudioCloud* button to complete the link.

> Because you are searching for a StudioCloud event that is already linked to a StudioCloud client you must have **already** established this link between the **first** client **and** the event in StudioCloud.

If you wish to automatically populate the first Client with the details of the selected client then check the box at the bottom before linking the album.

Once an album is linked you will see *Linked to StudioCloud* in the main window's Title bar and the name of the linked event at the top of the StudioCloud submenu (under Orders menu).

Smith Album (Linked to StudioCloud) ← Title bar

StudioCloud ▸ Event: Family – Smith, James ← Event name
Export Orders To StudioCloud...

This event is already linked to another ProSelect Album

Hidden clients

In StudioCloud you can optionally set some non-principle clients (such as relatives to your clients) to be hidden. If you wish to include these in your search then check the *Include Hidden Clients* checkbox before searching.

Importing an Invoice

When Linking an Album to StudioCloud, ProSelect will check to see if there are any StudioCloud invoices associated with **both** the selected client and selected event.

If there is more than one you can select them individually to see a list of items and payments that each invoice includes. You can then choose:

Link Only: This will link the album but ignore the invoice

Link & Import Invoice:

> This will import all of the line items in the invoice and add them as Order Adjustments to the first client's invoice in ProSelect. It will also import any payments associated with the invoice.

Imported line items are marked with a dark grey dot and, by default, added to the top of the Place Order window.

Image No.	Size	Description	Qty	Subtotal	Total
● Order Adjustment		Indoor Studio Fee Senior	1	69.00	69.00
● Order Adjustment		Fatal Attraction Package	1	899.00	899.00

Missing Payment Methods

If any of the payment methods in the selected StudioCloud invoice included payments do not match with those currently setup in ProSelect then they will be marked with a warning symbol. These must be resolved before you can complete the import. To resolve a missing Payment method, click on the payment line and either:

(a) Click **Add New Method** button to add this method into ProSelect

(b) Click **Change Method To** button then select one of the existing payment methods from the popup menu.

Imported Payments are Locked

Since the payments that you are importing from StudioCloud are already in StudioCloud, they are marked as already exported in ProSelect and locked against being altered deleted or re-exported.

Invoices found for this Client and Event

Invoice No.	Date	Total	Discount	Payments
52	16 Nov 2014	$968.00	$0.00	Y

Selected Invoice Details

Items

Description	Product Code	Qty	Total
Indoor Studio Fee Senior	SFIS	1	$69.00
Fatal Attraction Package		1	$899.00
5x7 Package Print		1	$0.00
5x7 Package Print		1	$0.00
5x7 Package Print		1	$0.00
5x7 Package Print		1	$0.00

Payments

Date	Method	Total
17 Nov 2014	⚠ Check	$100.00
17 Nov 2014	Credit Card	$172.42

Resolve Payment Method

Add New Method

Change Method To

⚠ Warning: This Payment Method is not setup in ProSelect – please resolve before importing

Cancel   Link Only   Link & Import Invoice

Missing Payment Method

Click select to change method

Payments

Date	Method	Total
17 Nov 2014	⚠ Check	$100.00
17 Nov 2014	Credit Card	$172.42

Resolve Payment Method

Add New Method

Change Method To

Cash
Credit Card
Bank Transfer
Paypal
Other

⚠ Warning: This Payment Method is not setup in ProSelect – please resolve before importing

Cancel   Link Only   Link & I

Linking Clients to StudioCloud

StudioCloud Integration

Generally, you would make your first ProSelect album client the StudioCloud Client that you selected when linking the album to StudioCloud.

Any other Clients, that you plan to record orders for and export those orders to StudioCloud, must also be linked to a StudioCloud client **before** the order can be exported.

In the Client Setup window, you can

- Link/Unlink an existing ProSelect Client to a StudioCloud Client
- Add a new ProSelect Client from a StudioCloud Client
- Create a new StudioCloud Client from a ProSelect Client.
- Update a linked Client's details with those stored in StudioCloud

Note: The above options are hidden if StudioCloud Integration is **not** turned on in the Preferences or the current ProSelect album is **not** linked to StudioCloud.

The following pages discuss each of these operations.

This Client is linked

StudioCloud ClientID (read only)

Only shown when Album is linked to StudioCloud

Client Details

First Name: James   Last Name: Smith

Address: 478 E Paradise Dr   Acnt. Code: 2389508
Address: Home Phone: 801-655-5118
City: Orem   Work Phone: 801-310-6134
State: UT   Cell Phone: 801-310-6152
Zip: 84097   Email:
Country:
Tax: State Tax Default
Notes:

Orders: 0 Items Ordered
Last Order: None

Add New Client
Add from StudioCloud
Unlink from StudioCloud
Update with StudioCloud
Delete
Copy from Previous
Clear All Information
SendMyRooms Invitation
Clear Notes
Save Changes   Close

James Smith   Linked to StudioCloud

Linking Clients Options

Add New Client from StudioCloud

Clicking the *Add from StudioCloud* button in the *Client Setup* window will show this dialog window:
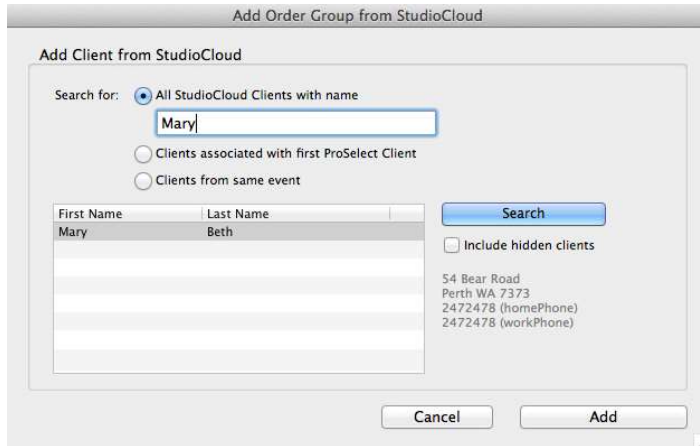
You can:
- Enter the name or part of a name to search from all of your StudioCloud clients.
- Find all clients associated with the first client
- Find all clients from the Same event

Hidden clients: In StudioCloud you can optionally set some non-principle clients (such as relatives to your clients) to be hidden. If you wish to include these in your search then check the *Include Hidden Clients* checkbox before searching.

Automatic Event Linking: When adding a new client from Studio-Cloud, linking to an existing StudioCloud client or creating a new Studio-Cloud client from a client, the StudioCloud client is automatically linked to the same event that the current Album is linked to.

Link Current ProSelect Client to a StudioCloud Client

If you have manually added a Client in ProSelect and later wish to link it to a StudioCloud client then select the *Link to StudioCloud* button in the *Client Setup* window to show this dialog window:
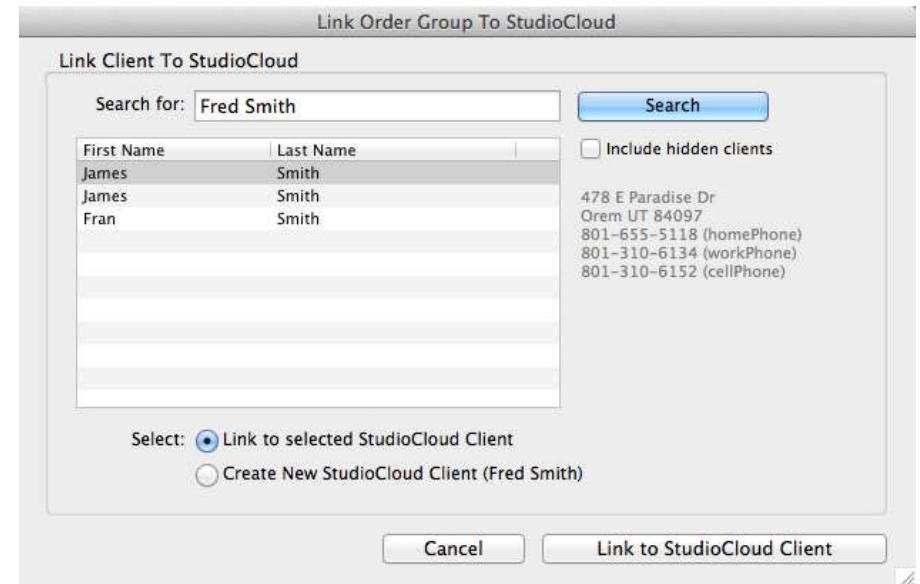
The first and last names of your client will be automatically placed in the search box so you can first check to see if this client already exists in Studio-Cloud.

If it does, then select the client from the list, and the *Link to selected Studio-Cloud Client,* and click the *Link to StudioCloud Client* button.

If you can't find the client, then select *Create New StudioCloud Client* and click the *Add Client to Studio Cloud* button (not shown above). This latter option will send your entered client information to StudioCloud.

There are three ways that ProSelect will synchronize the client information in ProSelect **with a linked StudioCloud Client**:

1. If you have selected *When Saving Changes to a Client: Send Updated Client Details to Studio-Cloud* in Preferences (General Settings: Integration), then this will happen every time you Save any changes in the Clients Setup window.

2. If you click the *Update with StudioCloud* button in the Clients Setup Window.

3. You choose *StudioCloud: Sync Clients with StudioCloud* under the Orders menu.

Resolving Conflicts

If there is a conflict of information between what you have entered for a Client in ProSelect and the details for the selected client in StudioCloud, the window shown on the right allows you to select which information that you wish to keep.

Click the Swap Details button until all of the correct information is on the left hand side. Then click the OK button.

PS = use details from ProSelect
SC = use details from StudioCloud ⎯⎯⎯⎯⎯⎯⎯⎯⎯⎯⎯⎯ Click to swap left with right

	Use these Client Details	From	Don't use
First Name	Jimmy	SC ⇄	James
Last Name	Provost		
Address	123 Fake Street	SC	
City	Padbury	SC	
State	WA	SC	
Zip	1234	SC	
Country			
Email	address@email.com	SC ⇄	jprovost@gmail.com
Home Phone	08947272747	SC ⇄	93471 72340
Work Phone	08947272747	SC	
Cell Phone	04143838274	SC	

Click the Swap Buttons to move the details that you wish to use to the left side.   Cancel   OK

After swapping the First Name:

	Use these Client Details	From	Don't use
First Name	James	PS ⇄	Jimmy

Contents: C1   C2   C3   C4

Orders recorded in ProSelect can be exported to become an invoice in *StudioCloud* provided that:

1. Your ProSelect Album has been linked to a StudioCloud Event, and

2. The client which you have recorded the orders against has been linked to a StudioCloud Client.

You can export orders for one or more Clients by:

(a) Clicking the Export Order button in the Place Order window.

(b) Choosing *Export Orders to StudioCloud* (under Orders Menu, Studio-Cloud submenu).

Export Orders to StudioCloud

When opening this window, ProSelect connects to StudioCloud and checks that any previously exported orders from your currently open album are still available in StudioCloud (since they could have been removed within StudioCloud).

If an order has already been exported, ProSelect also checks if any changes have been made to any orders (including payments) since the order was last exported.

You can quickly see which orders are ready to be exported for the first time or need to be updated in StudioCloud. These will have a checkbox displayed at the left-hand side. Check the one that you wish to export and click the Export button.

Export Status ———
Client is Linked ———

 Not Exported yet and ready to be exported
 Already Exported - changes made needs updating
 Already Exported - missing in StudioCloud (see next page)
 Cannot be exported - either no orders or not linked
 Exported and up-to-date in StudioCloud

Contents:

Exporting Orders II

StudioCloud Integration

Handling Missing Invoices

If a previously exported order has been deleted from StudioCloud, then a warning icon will be shown next to the Client.

If there are any payments associated with this invoice then you need to select which option to include:

(a) Only payments added since last exported

(b) All payments for this client

(c) No payments

Once you have select one of these options, you will then be able to select the client for re-exporting to StudioCloud.

Missing Invoice needs attention

Select which payments to re-export

Contents: C1   C2   C3   C4

If you record all your payments in ProSelect after first importing any StudioCloud invoices related to the job, those new payment details will be exported to StudioCloud when you either Export the Order or Update the Order.

However, if you instead add the invoice manually against an imported or exported invoice in StudioCloud, both system will no longer match.

To correct this you can use the *Update from SC* button in the Add/Change Payments window.

This will download all payments related the the current invoice then check them against existing payments in ProSelect. If they have the same payment the ProSelect payment will be updated to match the one in StudioCloud. Any new payments will be added and any missing ones will be removed from ProSelect.

About Exported Payments

When StudioCloud integration is turned on, ProSelect will lock any payments that have already been exported to StudioCloud. This is to prevent the two systems from getting out of sync. Locked payments have a lock icon next to them and can't be changed.

Normally, if you need to make a change to a payment that has been exported to StudioCloud, then the best way is to add another payment with a correcting amount. For example if you wish to record a refund, add another entry with the same negative amount.

However you can bypass this locking by clicking on a locked payment while holding the *Alt/Option* key down. This will allow you to delete a locked payment.

Second payment to cancel first ⟶

Exported First ⟶
Payment is locked

Payments		Update From SC	Add	Delete
Date	Method		Amt	
3 Jan 2016	Credit Card		$500.00	🔒
3 Jan 2016	Credit Card		-$500.00	

Total Payments: $0.00
Balance: $580.00

Selected Payment

Date: 3/01/2016 D/MM/Y

Amount: -500.00 by Credit Card

Actions Available in StudioCloud

Apart from the integration options available from within ProSelect, you can also initiate several operations from within StudioCloud. These include:

- Link your currently open ProSelect album to the selected event
- Create a new ProSelect album linked to the selected event
- Open a linked ProSelect album
- Unlink a ProSelect album from the selected event
- View the location on your computer of the linked ProSelect album

Accessing ProSelect Actions

1. Open and login to StudioCloud

2. Find and edit the event you want to edit.This can be done through the calendar component, client history, or many other places throughout the program. All of these different locations use the same edit event window.

3. On the bottom left of the edit event window is a button labeled "More Actions"

4. Click the button and select the ProSelect Integration option that you wish to use.
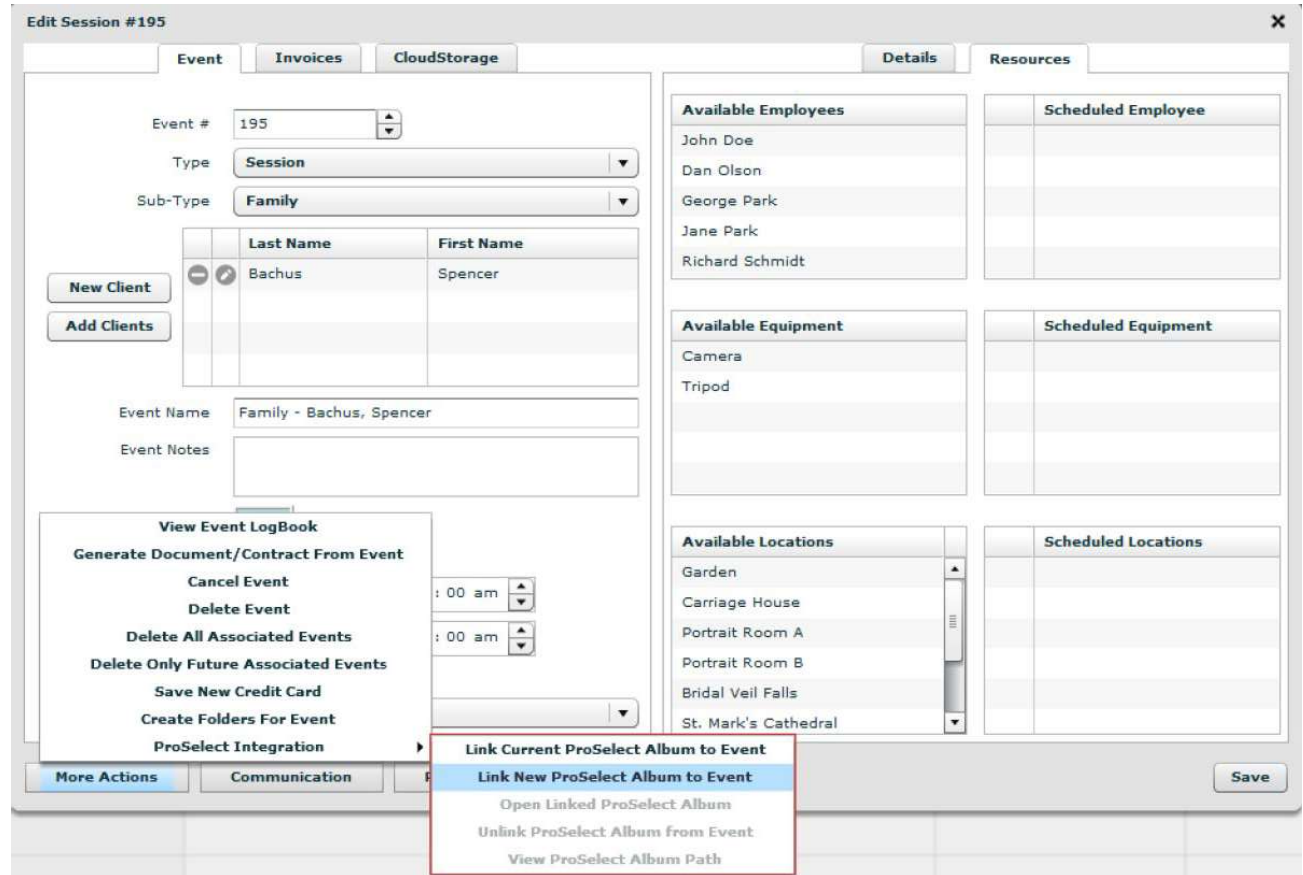
Connecting to ProSelect from StudioCloud

StudioCloud sends commands to ProSelect using ProSelect's *remote commands* facility. For these commands to work, ProSelect must be already running showing only its main window.

Having any other windows or dialog boxes open in ProSelect will tell StudioCloud that ProSelect is *currently busy* and the operation cannot proceed.

Contents: