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# Introduction

Welcome to the Craft Maker Pro Operations manual.

In order for you to get up and running as quickly as possible there are 10 Steps outlined for you to go through which will show you how to navigate around Craft Maker Pro and enter your information.

Follow these steps in order when starting out as they are in logical order from installation, setting up your company details, entering your inventory through to creating invoices and catalogs.

After these initial steps there are further advanced features and functions for you to become familiar with.

Getting familiar with these will help you get the most out of Craft Maker Pro so that you can become more efficient in your day-to-day operations and create a streamlined operation for your craft business.

If you would like to print out a copy of this manual you may download a pdf copy from here: http://www.craftmakerpro.com/pdf-manual

I wish you all the best and hope that you enjoy using Craft Maker Pro.

Regards



Gary Capps

Company Founder

CraftMakerPro.com

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# Getting Started:

## • *STEP 1 – Installation For Windows & Mac:*

In the email that was sent to you is a link to download Craft Maker Pro's installer file for your operating system. You can click on that link directly, copy and paste the link into your browser or right click on the link and select save as.

When saving ensure that you save the file to a place on your computer that you can easily find it again, we would recommend saving directly to your desktop.

## • *Windows Installation:*

Firstly you need to launch the installer file that you downloaded.

**Fig 1: Launch Installer Program**




This will launch the installer sequence.

Follow the prompts and agree to the terms and conditions to complete the installation.

**Fig 2: Follow Installer Sequence**






Craft Maker Pro will have installed into a new folder directly in your C drive called C:// Craft Maker Pro.

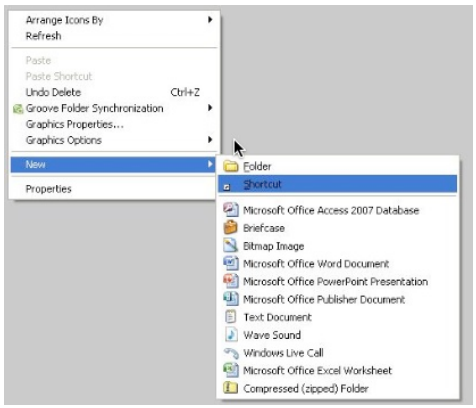
When first starting Craft Maker Pro you will be prompted to enter your license code. You must be connected to the Internet the first time you do this in order for the code to be registered correctly.

If you have not received your license code please check the spam folder for your email program in case it has been filtered off.

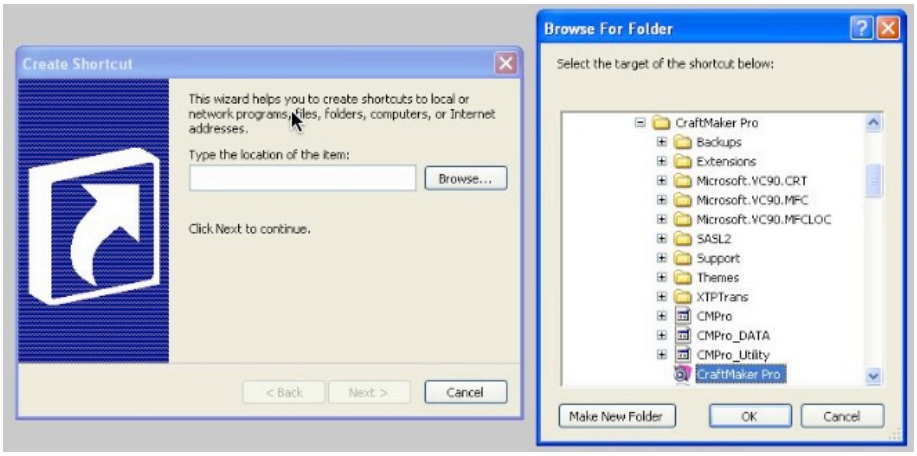
### Fig 3: Creating a desktop icon for Windows.

If you would like to create a shortcut to Craft Maker Pro then you can create a desktop icon by right clicking on your desktop. Select “New” – “Shortcut”. Browse to the installed location of Craft Maker Pro Folder (*by default installation will be C:// Craft Maker Pro/)* and locate the .exe file and select it.

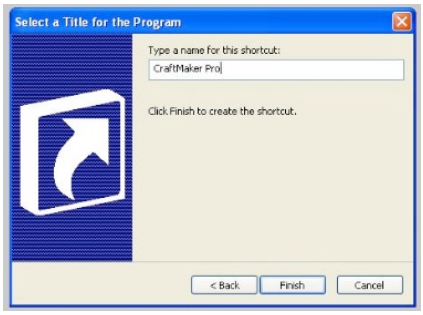
1. Right click on the desktop, select “New” – “Shortcut”




2. Browse to the file location where Craft Maker Pro is saved




3. Type in a name for your shortcut – it can be anything you like and click finish



- ***MAC Installation:***

Firstly you need to launch the installer file that you downloaded.

**Fig 4: Launch Installer Program**

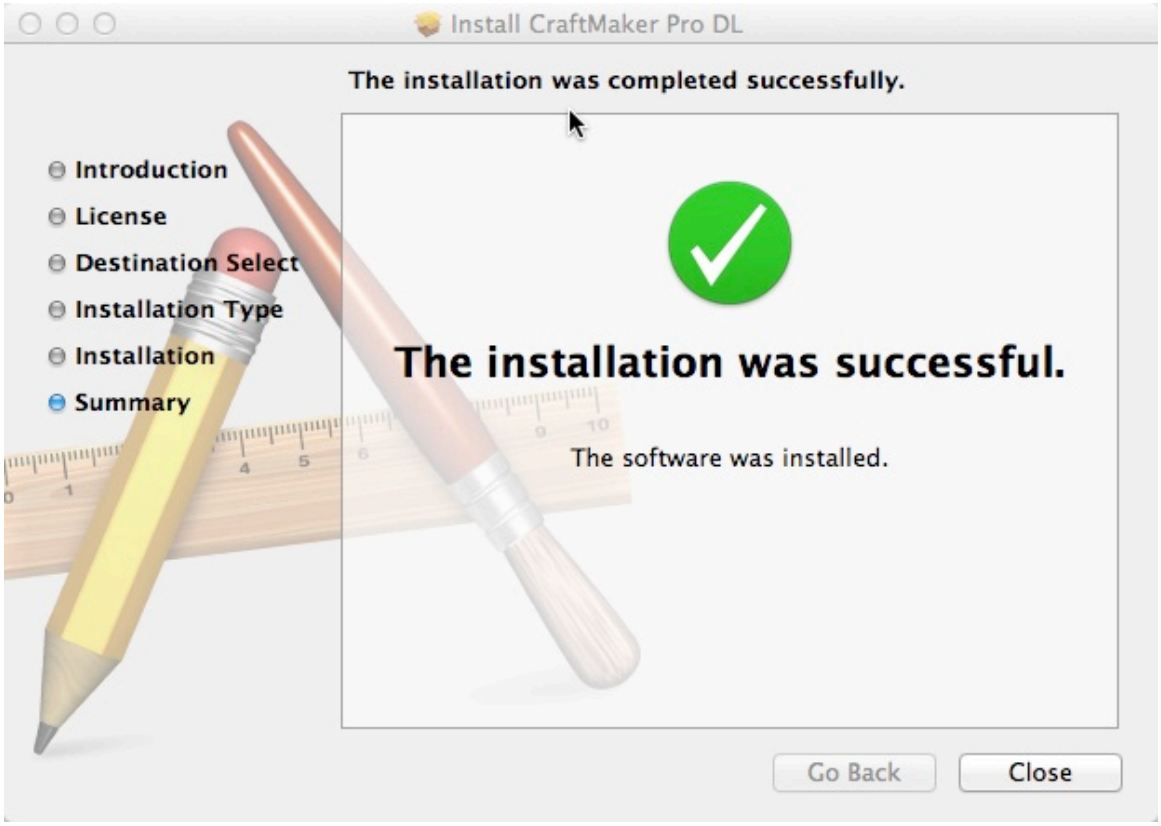



This will launch the installer sequence.

Follow the prompts and agree to the terms and conditions to complete the installation.

**Fig 5: Follow Installer Sequence**






When first starting Craft Maker Pro you will be prompted to enter your license code. You must be connected to the Internet the first time you do this in order for the code to be registered correctly.

If you have not received your license code please check the spam folder for your email program in case it has been filtered off.

- ***STEP 2 - Navigation:***

Once you have launched Craft Maker Pro you will be faced with the main operations screen. From here you can navigate through the categories that are listed below in order to set up and customize Craft Maker Pro to your personal needs.

Navigation can be done through returning to the "Main Menu" each time or by using the tabs at the top of the main operation screen.

**Fig 6: Main Menu Screen Shot**




When clicking into a category there is a secondary navigation below the top-level navigation. This secondary navigation has several consistent buttons on it such as the "New", "Delete" and "Alerts Summary" for each section.

Depending on which section of the program you are in and whether you are in "List View" or "Detailed View" this secondary navigation will have different buttons specific to the section operation requirements that you are in.

**Fig 2:** **Navigation Levels & List Views – Parts Example**

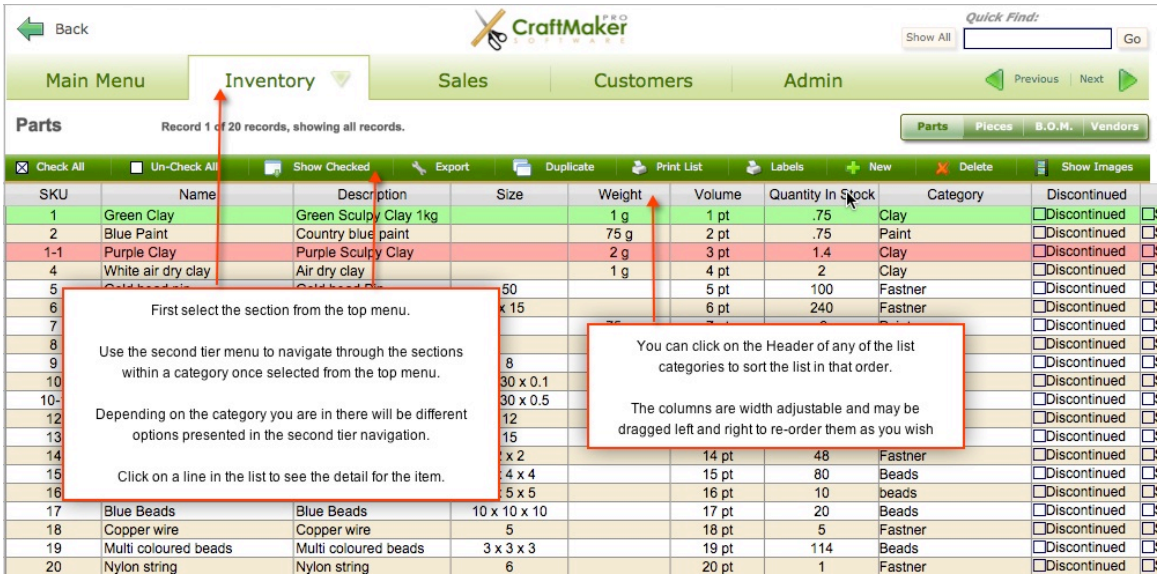
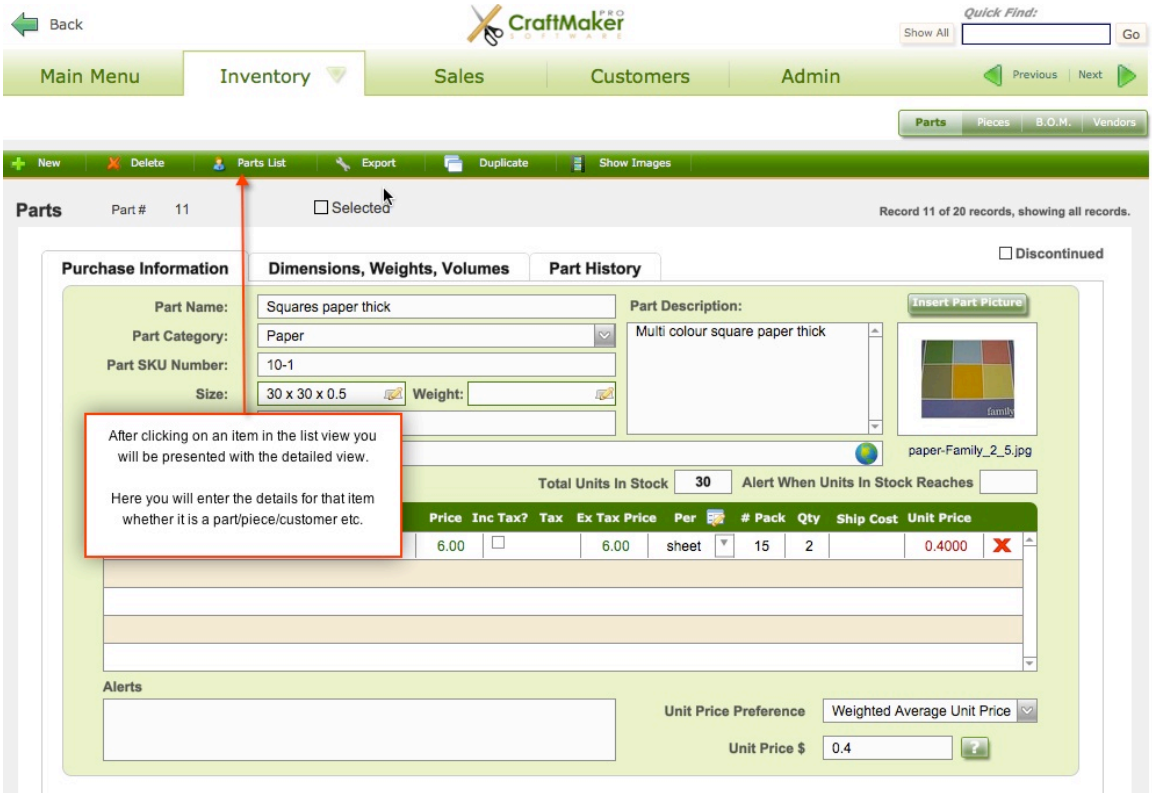



**Fig 3:** **Detailed Views – Parts Example**



# Company Setup and Administration:

- ***STEP 3 - Company Setup:***

Ok, now that you have Craft Maker Pro installed and you know how to navigate around its time to start setting up your personal information.

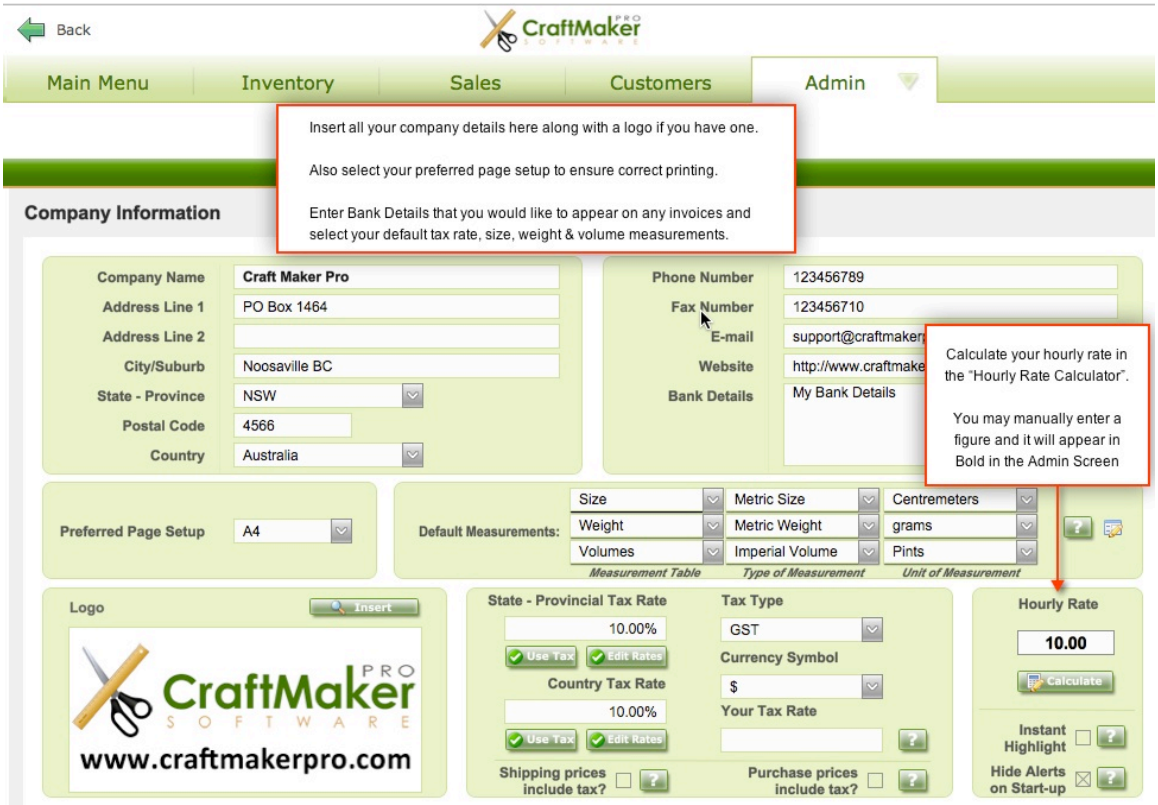
In this step you will setup all the information that Craft Maker Pro requires in order to put your details at the top of invoices and consignment notes as well as to calculate tax on your finished pieces.

Click into the Company Setup button on the main screen or the Tab at the top. In here you fill in Your Company contact details. You should also choose your preferred page setup either A4 or US letter as this will be the default used for printing options later on.

Select the default measurements that you would use for your country for size, weight & volume measurements. These are used in later stages when entering parts and pieces to calculate size, weight or volume and can be adjusted on a per item basis later.

You can also insert your company logo if you have one and this will be printed at the top of invoices and catalogs. Best resolution is 300 pixels * 140 pixels. Any other size will be re-sized to fit; images with .jpg extension are best suited for re-sizing.

**Fig 4:** **Admin Section Company Details**



The tax rate that Craft Maker Pro will use is decided by the Country OR State that you select for your company details. Default setting is Australia. If you change the Country you will need to click on the "USE TAX" button for either the applicable State or Country to update the "Your Tax Rate" field.

If your country tax rate is not in the default settings you can override Your Tax Rate by clicking in the “Your Tax Rate” box and typing in the correct tax rate.

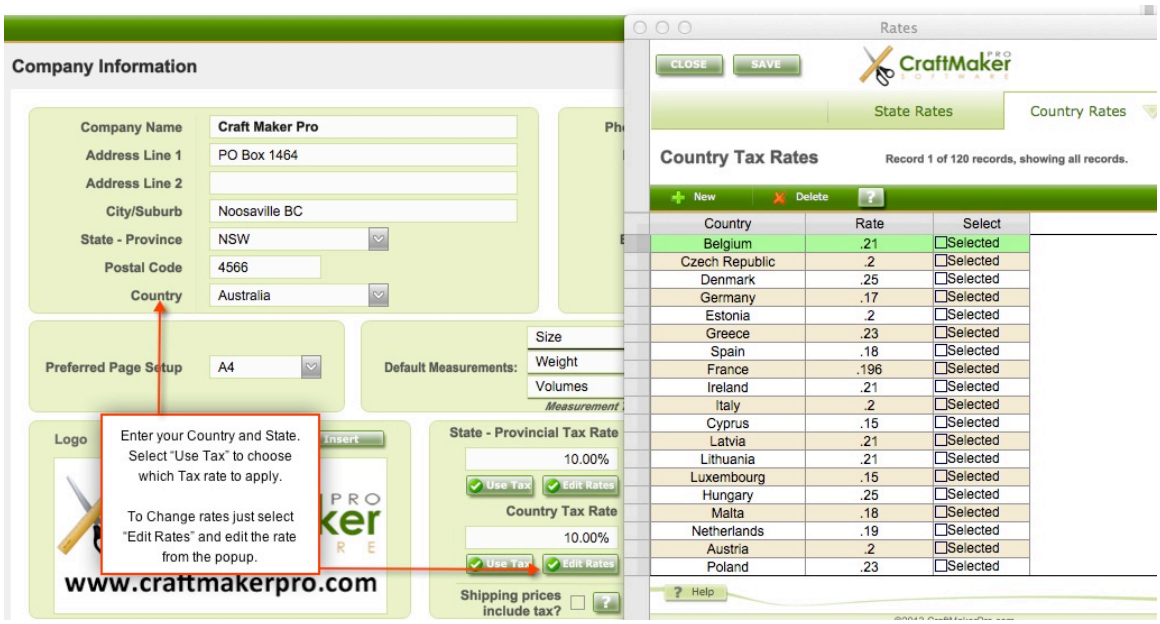
You can edit all the Tax rates by selecting the “Edit Rates” button for either the State or Country.

This will bring up a new window with all the Tax rates in for Both State and Country.

Edit the values required and then Save.

***Note -** Tax rates must be entered as a decimal point. i.e. 10% = 0.1

**Fig 5:** **Editing Tax Rates**




You will also need to calculate your hourly rate for labor in the hourly rate calculator.

You may just manually enter an hourly rate on the Admin section if you wish but using our hourly rate calculator will help to ensure that you are not undervaluing your jewelry pieces by forgetting about how much your valuable time is worth.
**(# Note** – if you manually type in a figure for your hourly rate then it will appear in **Bold**.)

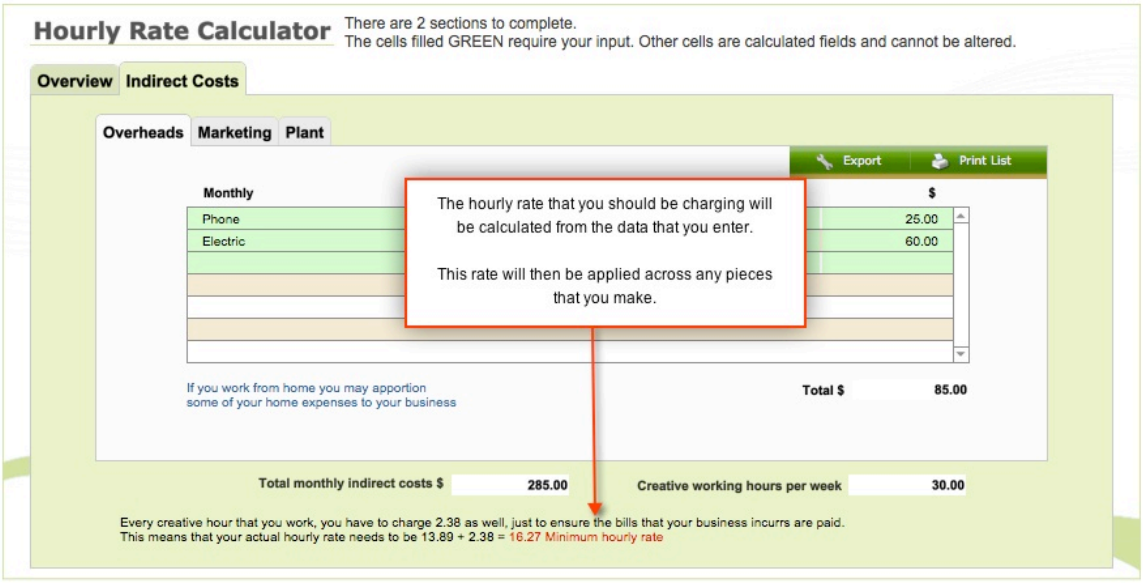
Click on the Calculator button to enter the Hourly Rate Calculator Screen.

In here there are two main sections:

1. **Overview** – how much you would like to earn per year from your craft business. Fill in the green sections to work out how many hours per week you will actually be working on creating pieces and how much you need to charge per hour in order to achieve the income you desire.

2. **Indirect Costs** – costs associated with running your business.
   *Overheads*: these include your rent, electricity, phone, Internet anything that you have to pay to keep yourself running every month. If you work from home some of your home bills may be attributed to this depending on the Tax law of where you live.
   *Marketing:* if you are running advertising every month or pay for any regular media add it in here. If you do several regular shows per year add up the cost of these shows and divide it by 12 before entering it in here.
   *Plant:* the tools that you use are normally tax deductible. Enter any tools/plant that you have in here and Craft Maker Pro will devalue the tools by 20% per year for the next 5 years.

**Fig 6:** Hourly Rate Calculator




*** Important** – *you should seek independent financial advice on the tax laws of your country to ensure that anything that you enter into the Hourly Tax rate calculator is applicable to the Tax Law of your country. CraftMakerPro.com is not providing financial advice in the respect of what may be tax deductible and will not be responsible for any assumptions made from the data entered by the user.*

# Inventory and Production:

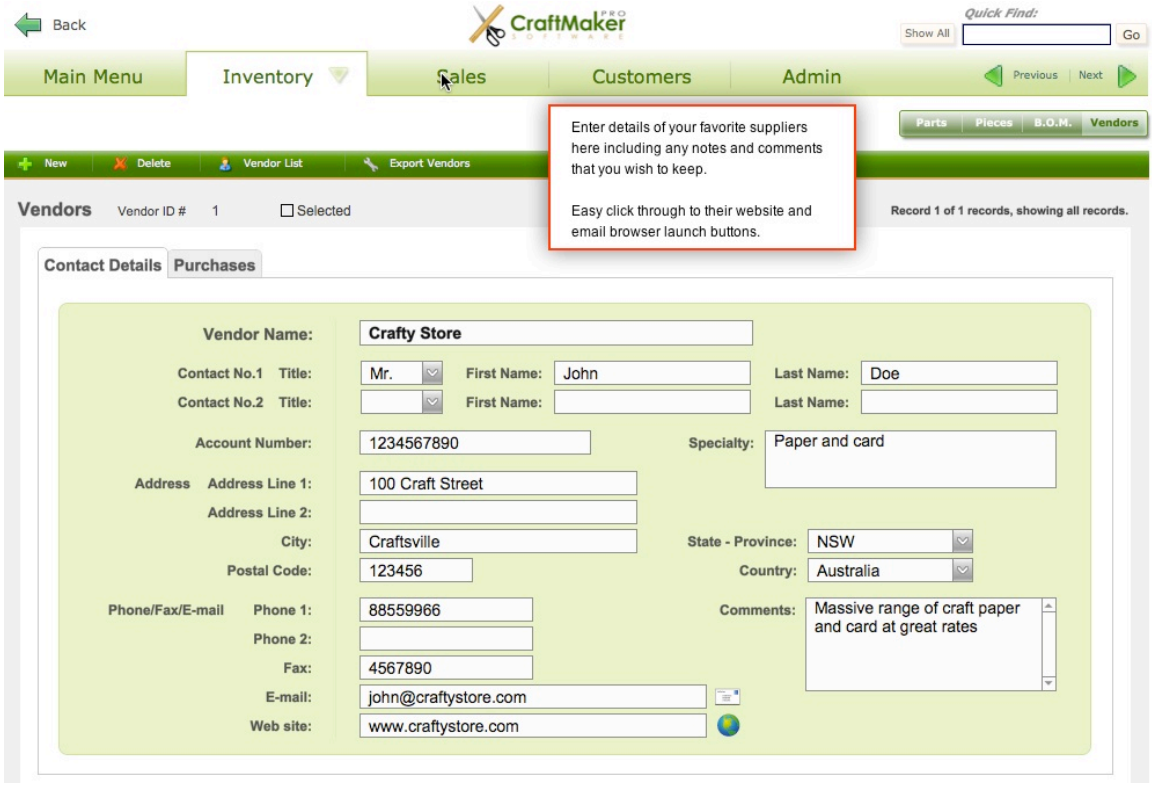
## • *STEP 4 - Vendors:*

You can keep contact information on different vendors that you may purchase supplies from in this section.

When adding new parts to your inventory you can add in the vendor that you purchased them from. This is not compulsory but if you wish to do so it is best to add in any and all of your preferred vendor details before moving on to Step 5 – Inventory Parts.

To add a new vendor simply select "New" on the right hand toolbar and fill in their details on the Vendors screen that comes up.

**Fig 7:** **Detailed View – Vendors Contact Details**




Please note that you can also add in Purchases here in the Vendor Purchases tab. This is covered in the Advanced section of this manual as these first 10 steps are designed to get you up and running quickly and easily and at this stage you only need to add in a vendor.
**Click here to skip to Adding Parts In Vendor Purchases Tab.**

- ***STEP 5 - Inventory Parts:***

Once you have setup your company information you can start adding your stock into the inventory management section of Craft Maker Pro. Inventory levels will automatically be updated when you add parts to a completed piece.

There are four sections within the inventory category:

**Fig 8:** **Inventory Parts Sections Menu**




The first section "Parts" is where you will put in all your parts that you use to create your jewelry pieces.

To add your first part click on the +New button.

This will take you to the detailed section where you can add all the information about the parts that you have purchased.

To return to the list view click on the Parts List button in the top menu.

To view the details of any part just click it in the list view.

**Fig 9:** **List View – Parts Sample**




Once in the detailed view to add new parts just click "New" on the right hand toolbar.

Fill in the Part Name field and categories the part as well as giving it a description. You can set alert values in here for when stock levels run low.

To add parts to your inventory click on "ADD NEW PURCHASE" then fill in the details of the part purchases according to the Date, Vendor, Price and Quantity fields.

**Date** - The date of your purchase, without this the part will not show in your inventory
**Vendor ID** - Who you purchased from
**Price** - The cost of the item per pack/unit of measure
**Inc Tax** - Check this box if the purchase price includes Tax
**Per** - The type of purchase, select from the drop down or add your own
**# Pack** - The number of items in the pack/bag
**Qty** - The number of packs/bags purchased
**Ship Cost** - The cost of shipping for that item.

The weighted average unit price of your purchases is used as the default setting to calculate the cost of your parts.

There are four options you may choose from to calculate your price preference by;

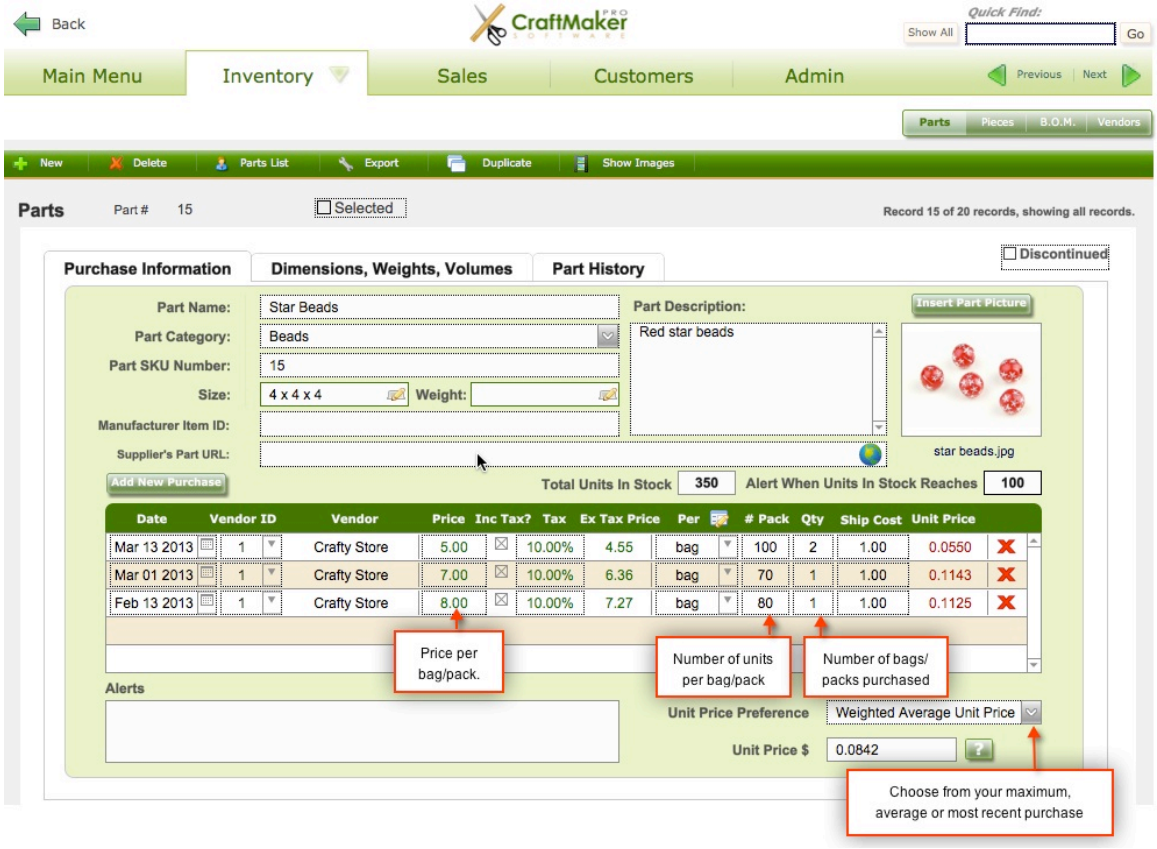
1. **Weighted Average Unit Price:**
   Total of all units purchased divided by total cost.
2. **Average Unit Price:**
   Average price of unit purchases divided by number of purchases.
3. **Maximum Unit Price:**
   The highest price you have paid for that part.
4. **Most Recent Unit Price:**
   The most recent purchase price for that part.

If you are working a lot with gold or other metals that regularly change their spot price this may be useful to ensure that you do not undercharge for your pieces when adding in the parts that you use to create a piece.

***Note*** *- If the price of a part does fluctuate dramatically we would recommend that you start a new listing for the part.*

### Detailed View – Purchase Information

Sample for multiple purchases of star beads.




***Note*** *– for the shipping cost if you have ordered several parts you will need to divide the cost of shipping between the different parts for that individual item only to the part.*

*I.e. if you have ordered 5 bags of different colored beads and the total cost of shipping was $10 attribute $2 shipping per bag when entering them into the inventory.*

**Fig 10:** **Editing Part/Per List**

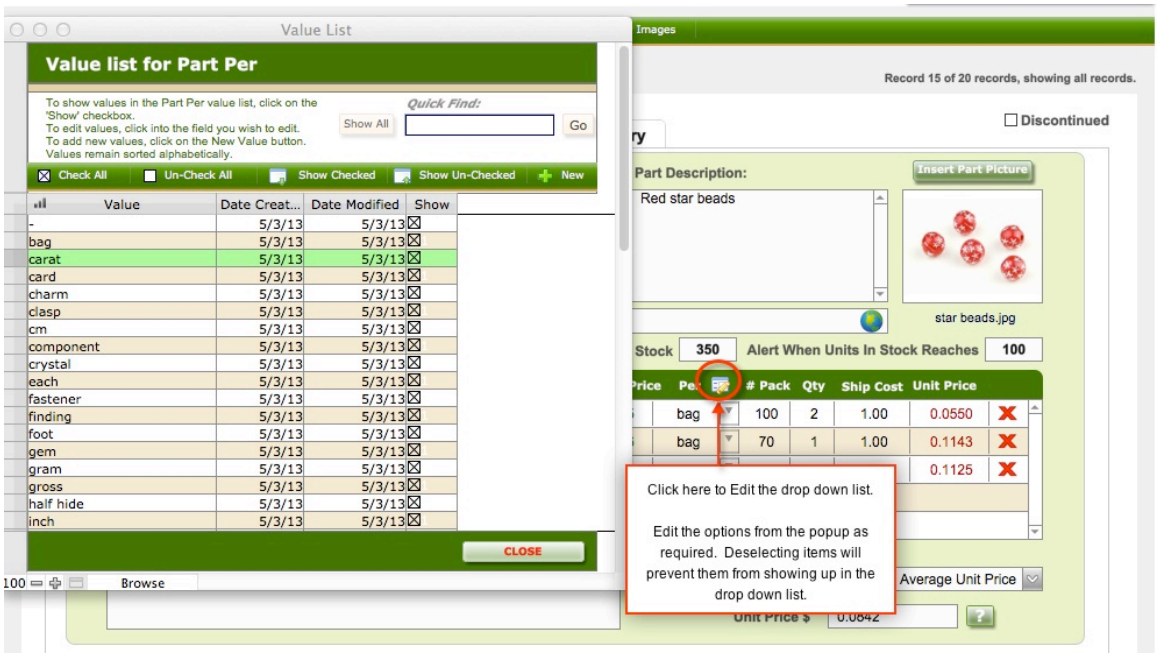
There are many different forms and sizes that various parts can come in. Craft Maker Pro comes pre populated with a vast list of sizes, weights and options.

You can edit this list to add more, delete or only show a smaller range of options.

Simply click on the Edit option next to “per” in the menu.

If you deselect items they will no longer show up in the drop down.

You can add, delete or amend items as you wish.



### Dimensions Weights & Volumes

The second tab will allow you to add in a size, weight or volume for any part you purchase.

This information is optional but if entered will be used to calculate the total size, weight or volume of a completed piece which can be very useful information to help calculate postage of items.

You may enter no information here or you can enter information for one or multiple values.

i.e. you may just enter a single size for length or you may enter the size length, width, depth as well as a weight and volume of the part.

The default settings from your Admin setup will be applied here but you can also convert any of these within the tab to change inches to mm or kg to lb. etc.

We recommend sticking to one unit of measurement for parts where possible, as this will make it easier when calculating total weights and volumes for pieces.

**Size:**

There are three possible dimensions for size.

1. Length
2. Width
3. Depth

You do not have to complete all fields as some items, such as wire would only obviously have a length.

Craft Maker Pro will only display the sizes that you enter, i.e. if you enter Length and Width then Craft Maker Pro will display L x W.

**Weight:**

You can enter in the weight of a part and select a unit of measurement for it. You can then convert that to another unit of weight if you choose.

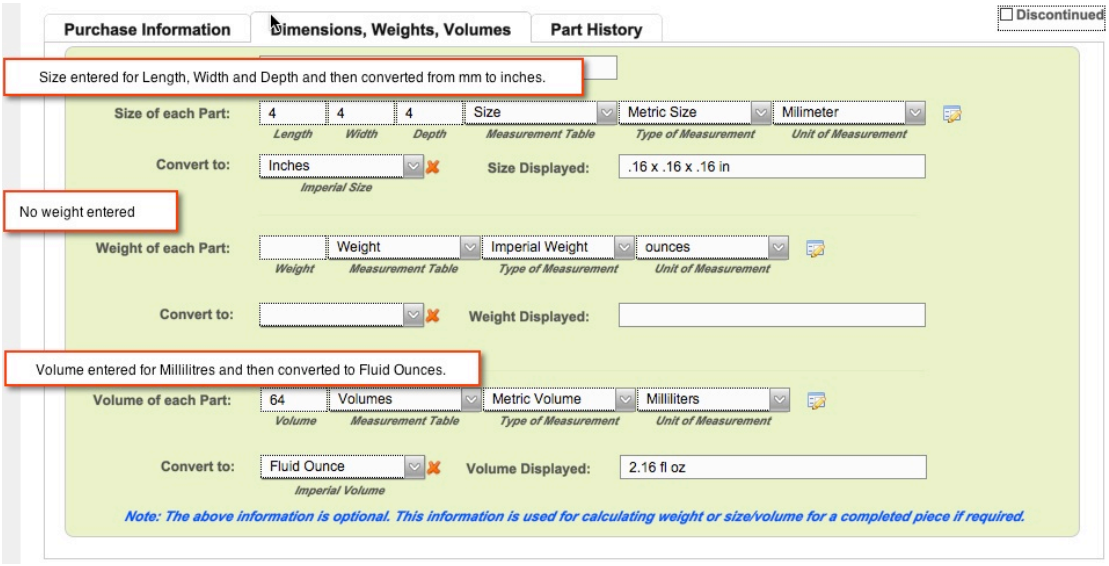
**Volume:**

You can enter in the volume of a part and select a unit of measurement for it. You can then convert that to another unit of volume if you choose.

The example below shows entries for size and volume but not for weight.

The size and volume entries have been converted from their original units of measurement from metric sizes to imperial measurements.

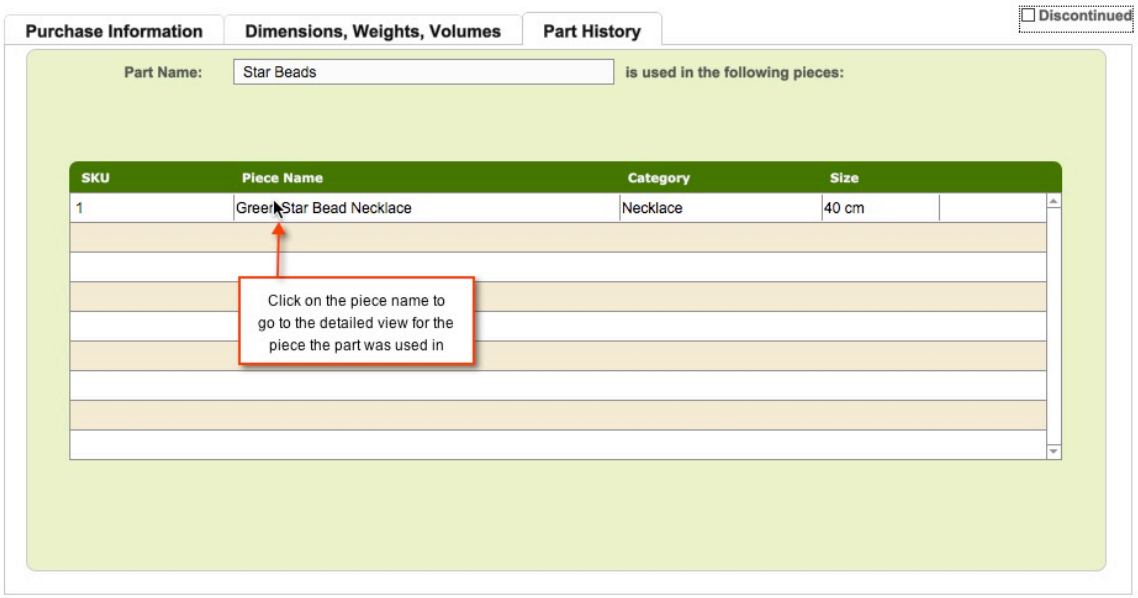
## Parts Size, Weights, Volumes example




## Detailed View – Part History

The third tab in the Part Detailed view will take you to the history for that part so you can see what pieces it has been used in.

Click on the Piece name to be taken to the detailed view for the Piece that the part was used in.



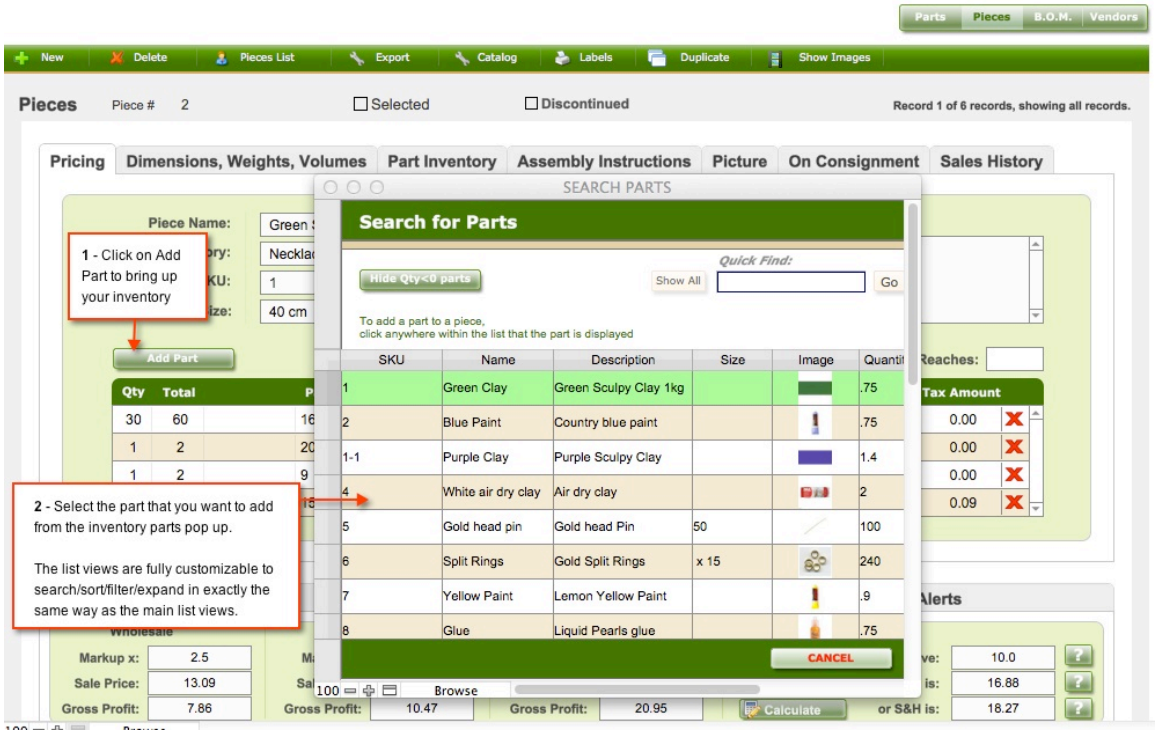
- ***STEP 6 - Inventory Pieces:***

The Inventory Pieces section is where you will add your pieces as you complete them.

Click into the details section, categorize the piece and give it a name.

By clicking on "ADD PART" you will add parts from your inventory parts list to make up the piece. Add the correct number of parts (Qty) to make one piece.

**Fig 11:** **Detailed View – Pieces Sample**




The total number of parts will be calculated depending on how many pieces you specify making in the "Pieces Made" field and displayed next to the Qty.

Any parts added to make up a piece will automatically be removed from your Inventory Pieces list. This is displayed on the list view as "Quantity" and the detailed view "In Stock" field to show what you have in stock.

***Note*** *- The popup will also show you the latest purchase info for the part as well when expanded.*

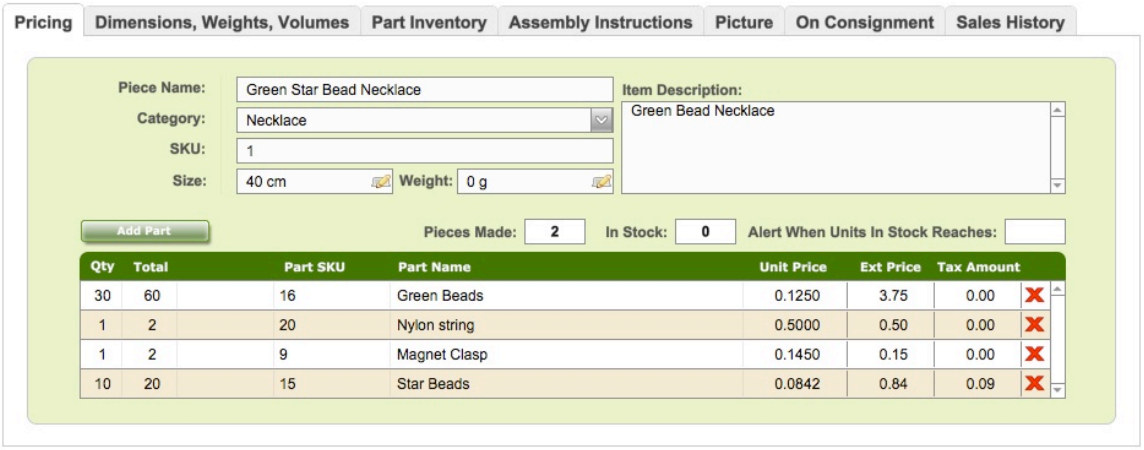
Once you have added in your parts to create a piece it will show details similar to this:




- **Qty =** Number of parts to make one piece
- **Total =** Number of parts to create the number of pieces made
- **Unit Price =** Individual price per unit of part
- **Ext Price =** Total cost of parts to create one piece

There are several tabs within the Inventory Pieces screen;

- **Pricing:**
  Enter all the details required for the parts required to make a piece. The cost price of the piece will automatically be calculated in the cost tab (shown in next section below).



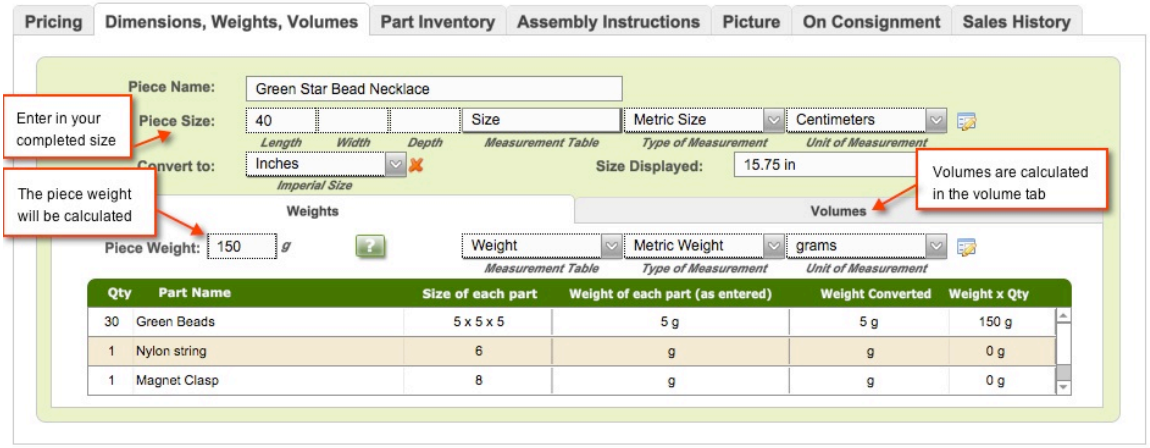

- **Dimensions, Weights, Volumes:**
  This section will allow you to enter a finished size for your piece and also calculate the weight and/or volume based on the parts that have been used.

  In the example below the size has been entered as 40 cm and then converted to inches.

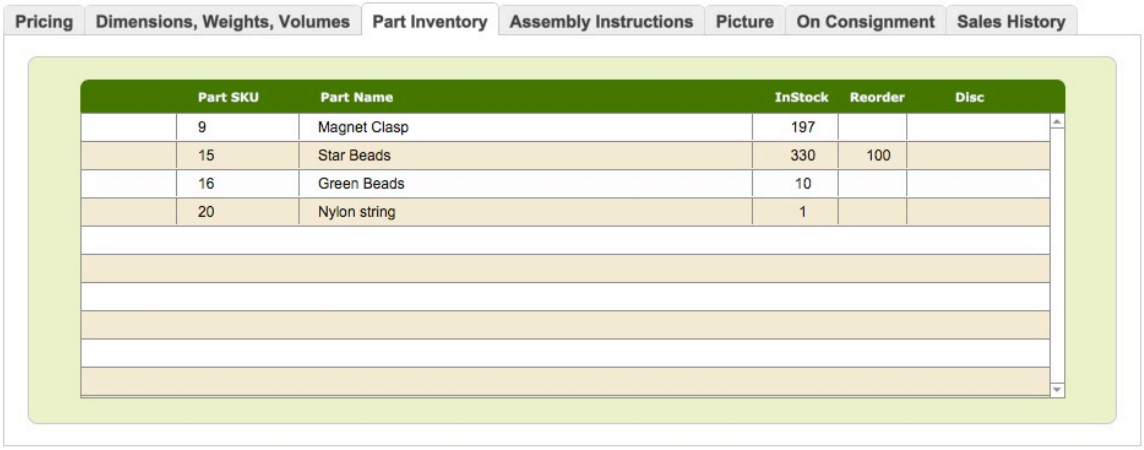
  The weight is calculated from the Green Beads. 30 beads at 5grams each = 150grams

  Volume would be calculated in the same way in the volume tab for any parts that have a volume entered in for them.

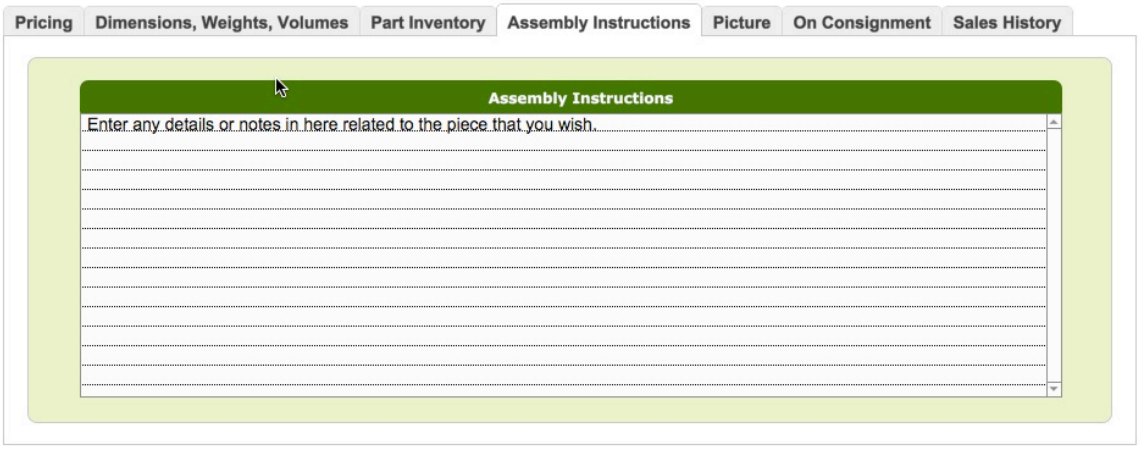
  All these values may be manually overridden.



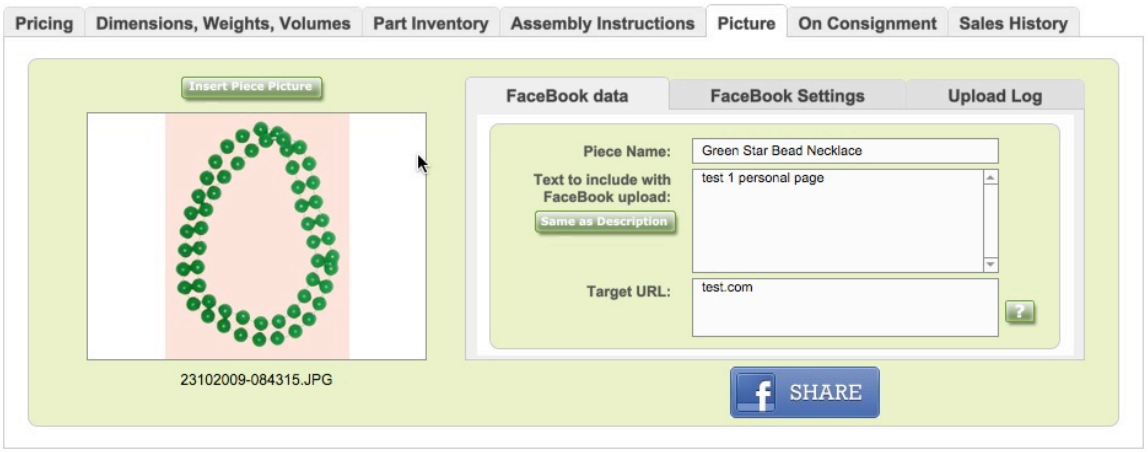

- **Parts Inventory:**
  Shows you the stock levels for the parts required to make the piece.



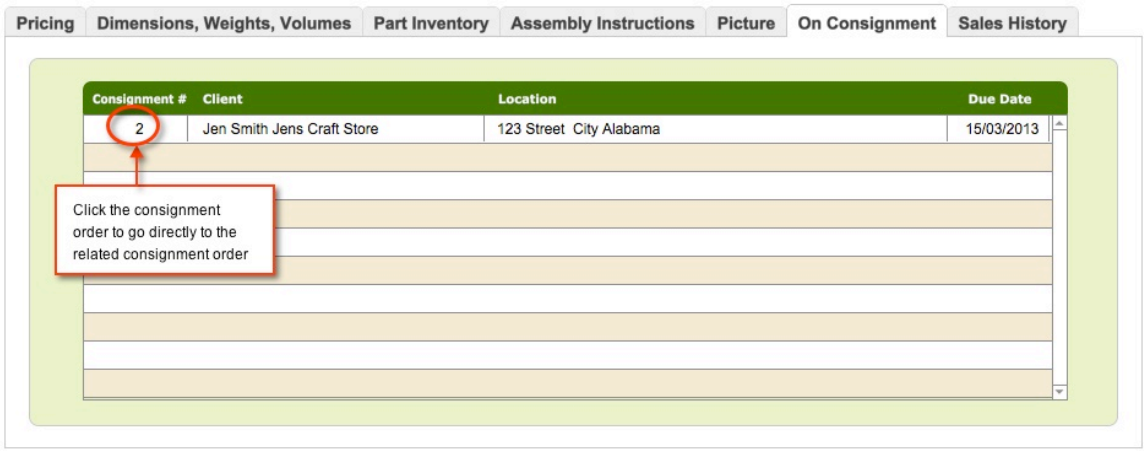

- **Assembly Instructions:**
  Allows you to keep detailed notes on how you created a piece for future reference.



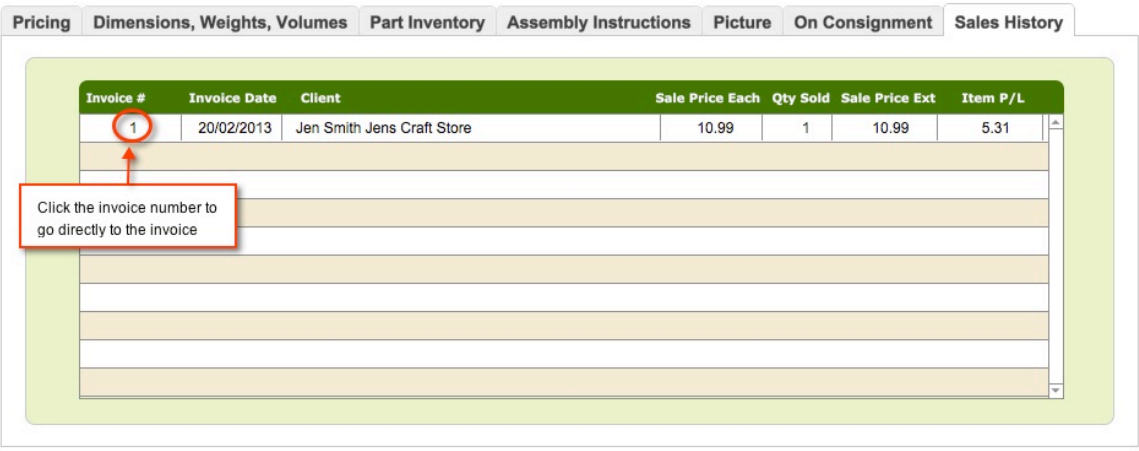
- **Picture:**
  Insert a picture here of the finished piece. This picture will be used for catalog pages. This section is also where you may publish your piece to your Facebook business page. Facebook publishing is covered in the advanced chapters.




- **On Consignment:**
  View details of the consignment location for the piece. You can click on the Consignment number to go directly to the actual consignment order.



- **Sales History:**
  View the sales history for the piece. You can click on the Invoice number to go directly to the actual invoice.




***Note** - When inserting pictures for best resolution when re-sizing use images with .jpg extension type.*

*The categories that appear in the drop down are based on previously entered values in the category field. Therefore, if you want to minimise the categories that appear in the list, you need to change existing part records and edit the categories there.*

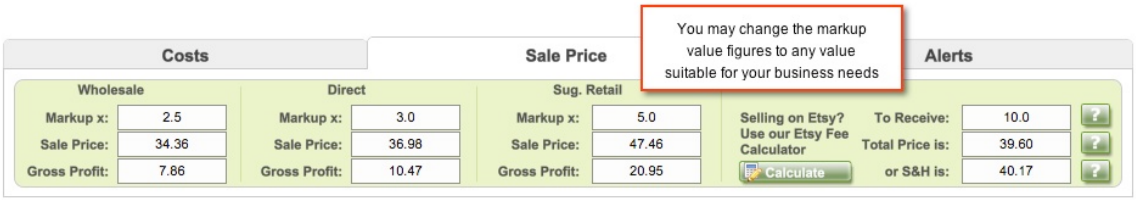
**Fig 12:** **Detailed View – Pieces Tab Options**

**Cost Tab**:
The total cost of the materials used as taken from the Inventory parts list. You can also add labor and other costs here.




***# Important Note** – The hourly rate used here (unless manually overridden which is then displayed in bold) is the hourly rate from the calculator in your Admin Setup. This rate is fixed to whatever your hourly rate is at the time you create the piece. If you update your hourly rate calculator at a later date the new hourly rate will be applied to any new pieces created but will not affect the hourly rate that was applied to previously created pieces to ensure that previous invoice prices are not affected.*

**Sale Price Tab**:
Calculates the Wholesale, Direct and Suggested Retail prices for a piece based on the markup you decide. You can change the Markup by clicking in the box and typing in a new value. There is also a calculator in here that will help you to calculate sales prices for Etsy. This is covered in the advanced section Etsy Calculator.




The Sale Price is calculated by marking up the cost of the material and then adding the labor and other cost. **It does not markup the Total Cost including labor.**

*Sale Price = (Markup value * material cost) + Item Labor + Other Cost*

For the example above we can see from the Cost Tab that the material cost is $5.24. Labor is $16.27 and Other Costs are $5.

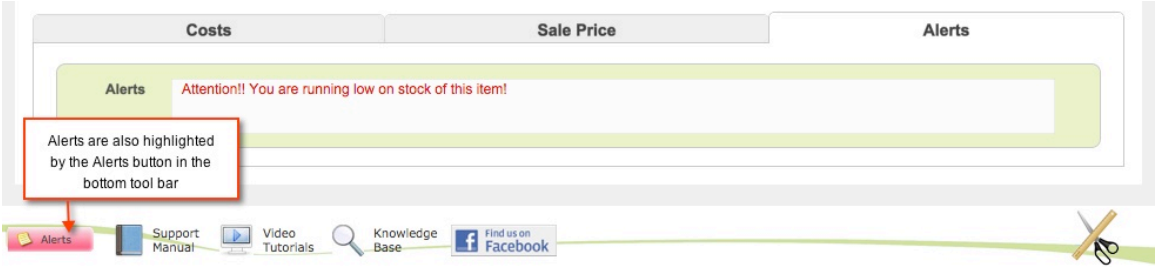
For the price calculations in the Sale Price tab this gives us the following pricing calculations;

- **Wholesale:** (2.5 * 5.24) + 16.27 + 5 = $34.36
- **Direct:** (3 * 5.24) + 16.27 + 5 = $36.98
- **Sugg Retail:** (5 * 5.24) + 16.27 + 5 = $47.46

**Wholesale** = Suggested pricing to sell to a shop who will be on selling your jewelry
**Direct** = Suggested pricing to sell to specific individual customers
**Sugg. Retail** = Suggested pricing to sell through your own store/website

As you may override any of these markup rates these are ***SUGGESTIONS*** only and you may apply them in any way you see fit for your business.

**Alerts Tab:**
Shows you if there is an alert for that piece if it is low in stock. You can set the alert in the Pricing TAB.



- ***STEP 7 - Bills Of Material:***

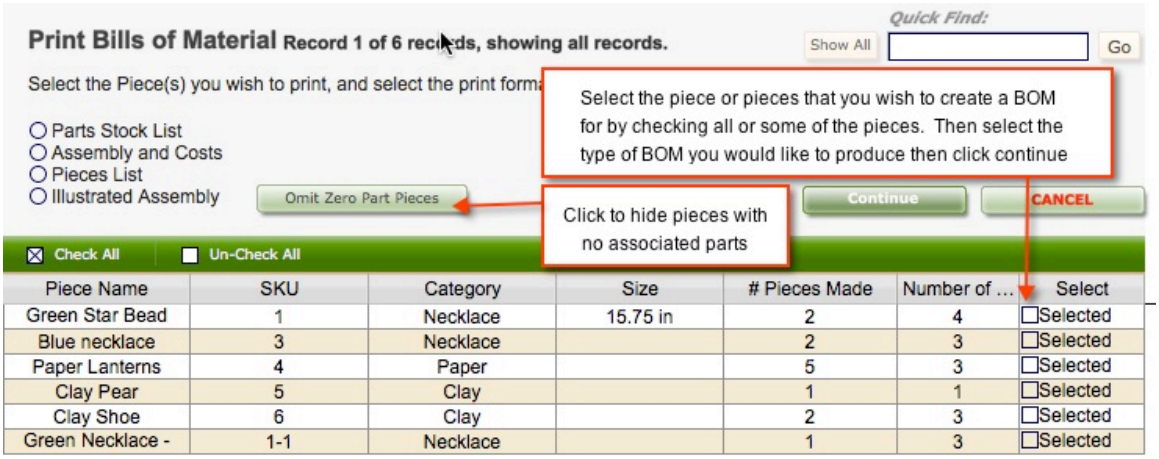
In Bills Of Material you can print off reports on pieces to show a Parts Stock List, Assembly and Costs as well as Pieces List.

Simply select "Print" next to the piece you require and then make your print selection from the screen that appears.

**Fig 13:** List View – BOM




**Fig 14:** Print View – BOM



# Customers and Sales:

- ***STEP 8 - Customers:***

The customer's tab is where you keep detailed information on your customers for invoicing purposes and consignment records.

There has been one sample customer entered so that you can see how the details are filled in.

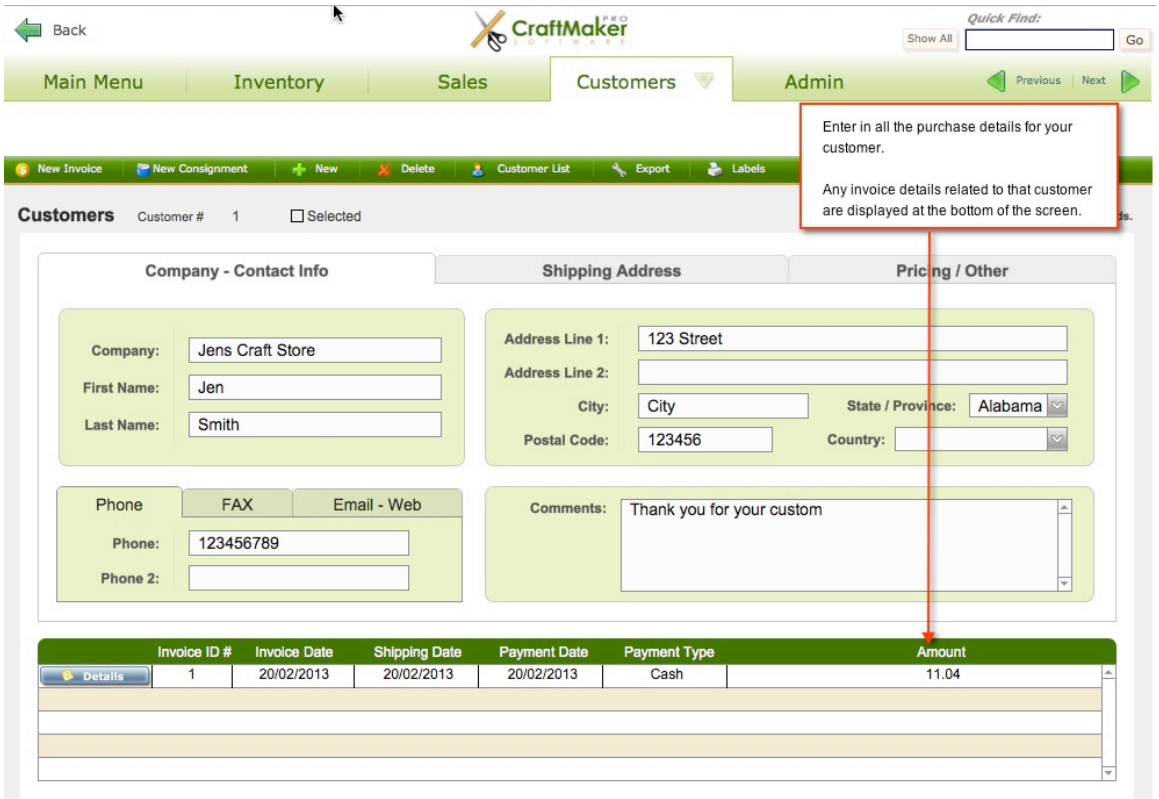
Select "New" on the right hand toolbar to add new customer details by adding their address details in the "Company - Contact Info" Tab along with any comments you may wish to record.

In the "Shipping Address" Tab complete their address details for deliveries, if this is the same as the billing address simply click the "Same As Billing" button.

In the "Pricing/Other" Tab you can choose what type of customer they are, Direct, Wholesale or Retails as well as setting Alerts for Birthdays, Anniversaries' or Other Dates of Importance. These Alerts will come up in the Alarm Summary when they are triggered.

At the bottom of the Customer Info screen you can see information regarding Invoices for that customer.

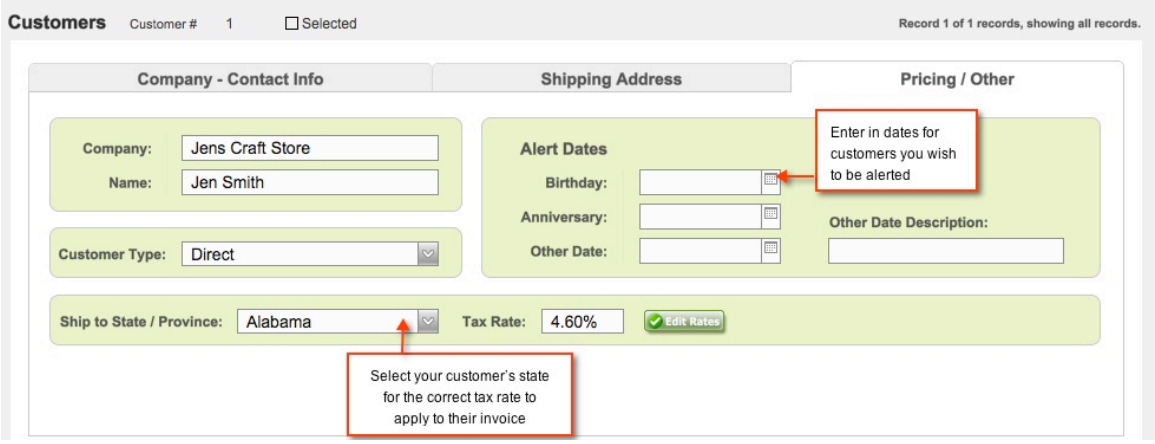
**Fig 15:** **Detailed View – Customer**



In the Pricing/Other tab you can set additional information for your customer such as Alerts for special occasions, allowing you to keep in touch at appropriate times.

You can also set the Tax rate for your customer by selecting their State so that will be used on their invoices automatically instead of the default rate from your Admin setting for your own State.

**Fig 16:** **Detailed View – Customer – Pricing / Other**



- ***STEP 9 - Invoices:***

Create Invoices for your customers and as you add the pieces to the invoice they will be automatically removed from your stock.

In creating a new invoice you can select "Create Invoice" next to a customer in the list or simply select "New" on the right hand toolbar.

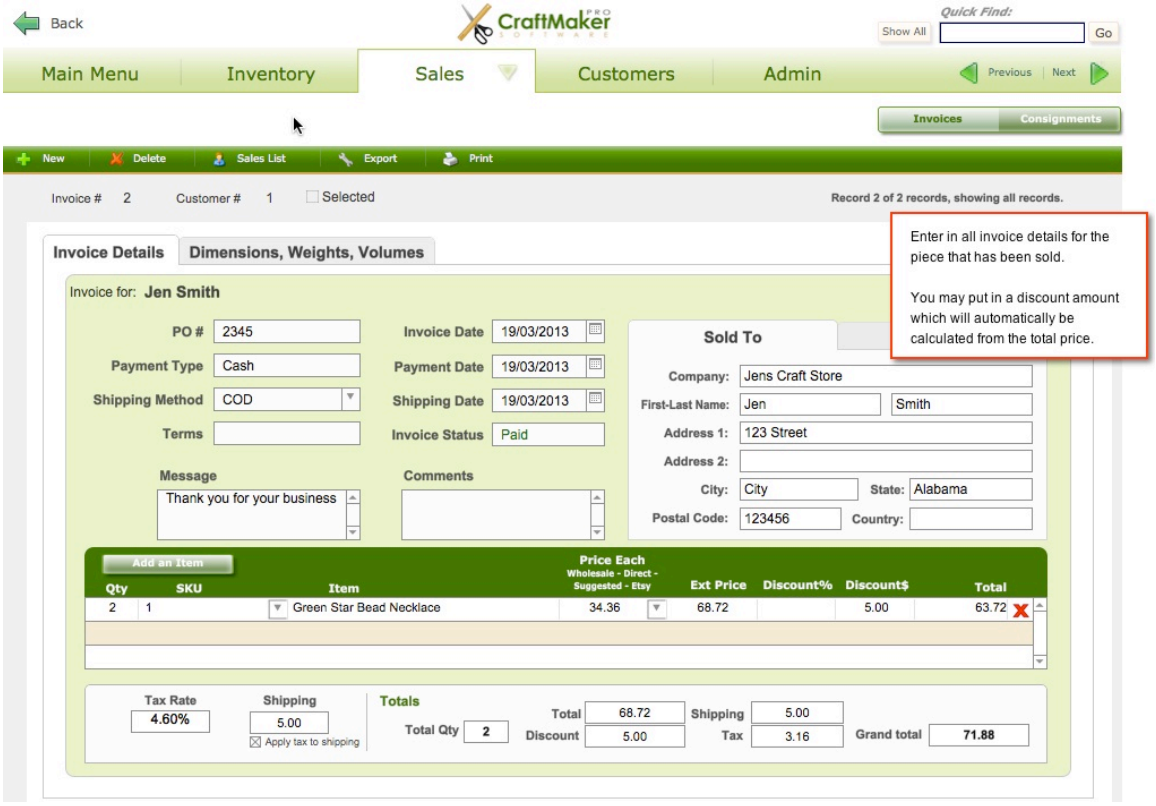
Fill in the information about the sale and "ADD ITEM" to the invoice. Items added will be removed from your Inventory Pieces List.

The Sale price will be added to the information fields as well as the Tax applicable to the sale, according to the information you filled in at the "Company Set Up" stage. You may give discounts and add shipping and handling costs if required.

To print the invoice simply select "PRINT" on the right hand toolbar, this will open the invoice for you to preview. You may also print shipping labels directly after the invoice.

You may also print a catalog of the items listed on the invoice for your customer.

**Fig 17:** **Detailed View – Sales**




***Note** – If you override the Tax rate manually then it must be entered as a decimal point.*

*i.e. 15% = 0.15*

*If you do not wish to charge Tax then you need to enter 0.*

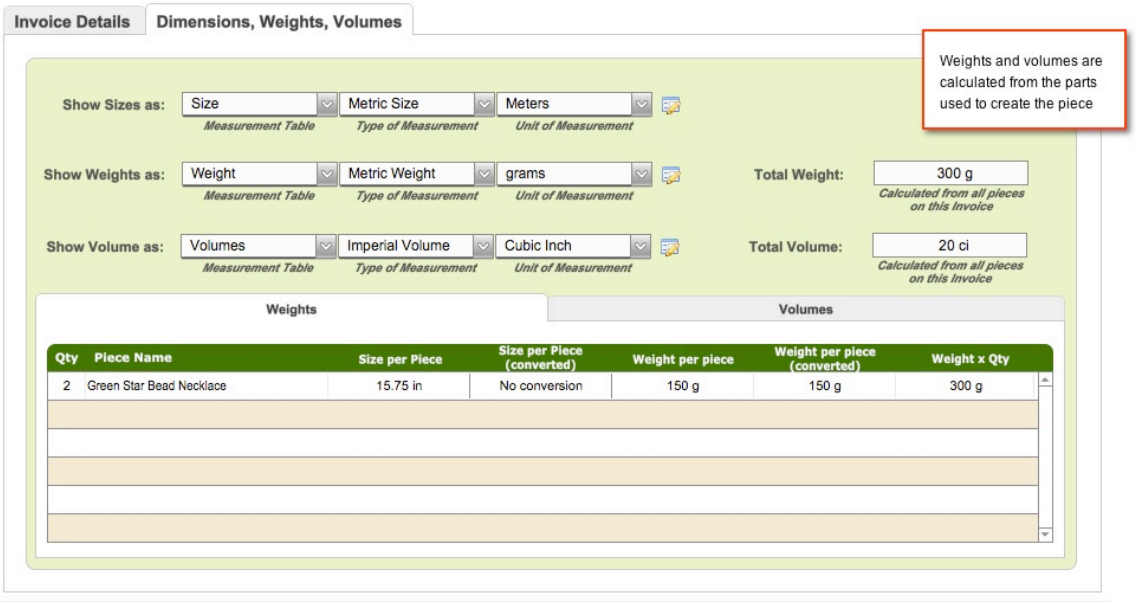
In the Dimensions Weights & Volume tab the size of a piece is calculated from all the parts that have been used to create it.

This can be useful information for posting items or listing them on sites such as EBay and Etsy.

The conversion calculator is designed to convert a final figure from imperial to metric if required.

Please note that it is best if you can enter all part items used in the same type of format, i.e. grams, ounces etc. that are used to create a part to ensure correct conversions take place.

**Fig 18:** **Detailed View – Sales Dimensions Weights & Volumes**



- ***STEP 10 - Consignments:***

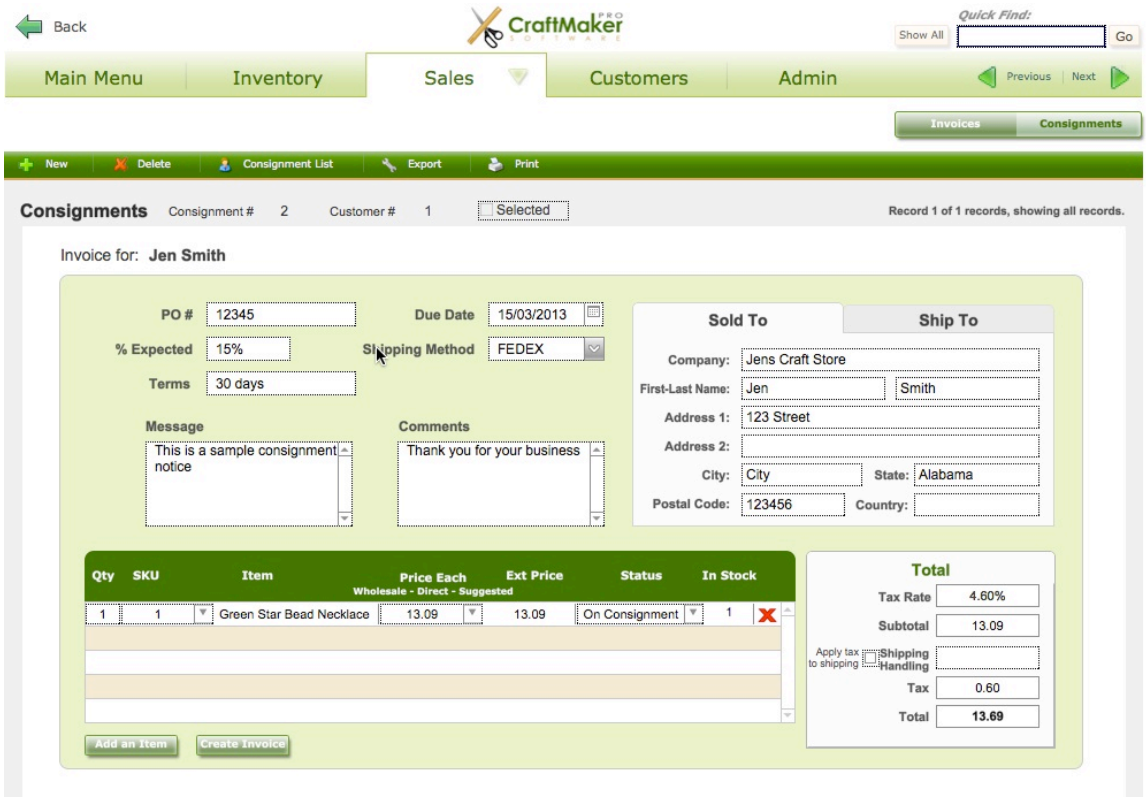
Create Consignment orders for your customers in much the same way as you created an Invoice in STEP 9.

In creating a new consignment order you can select Create New "Consignment" next to a customer in the list or simply select "New" on the right hand toolbar.

Here when you add items to the consignment order you select the status of each piece, whether it is On Consignment, Returned or Sold.

When the consignment order has been returned you can go back to the order and change the status for pieces that were on consignment to Returned or Sold. Once this is done click on "Create Invoice" to add an invoice to the customer for any parts that were sold and to automatically remove any pieces that were sold from you pieces inventory.

**Fig 19:** **Detailed View – Consignments**




***Note*** *– The % Expected field must be entered as a decimal point.*

*i.e. 50% = 0.5*

# Advanced Features Information:

- ***Navigation:***

**Fig 20:** **Menu Navigation – Inventory Parts Sample View**

In Craft Maker Pro there are three levels of Navigation:




1. **Main Menu Bar:**
   This is the top-level navigation and will take you through each of the main sections in the program.
2. **Sub Menu Bar:**
   Within each Main Menu section there are different subsections and these can be accessed here.
3. **Operations Bar:**
   Within both detailed and list views there are different operations that can be carried out on this menu bar. These will change depending which section of the program you are in.

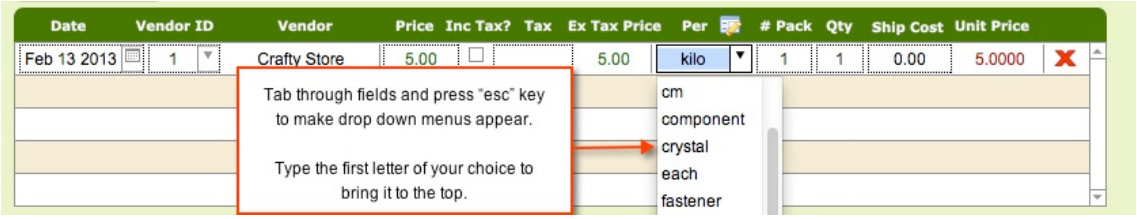
There is also a universal Back Button located in the top left of all screens. This will return you to the previous page you were on.

There are also Previous and Next buttons in the top right, which will allow you to quickly, scroll through particular sections.

- ***Tabbing***

When tabbing through fields and into a drop down menu press the “esc” (escape key) to make the drop down options appear.

You can then type the first letters of your choice in order to make them appear.

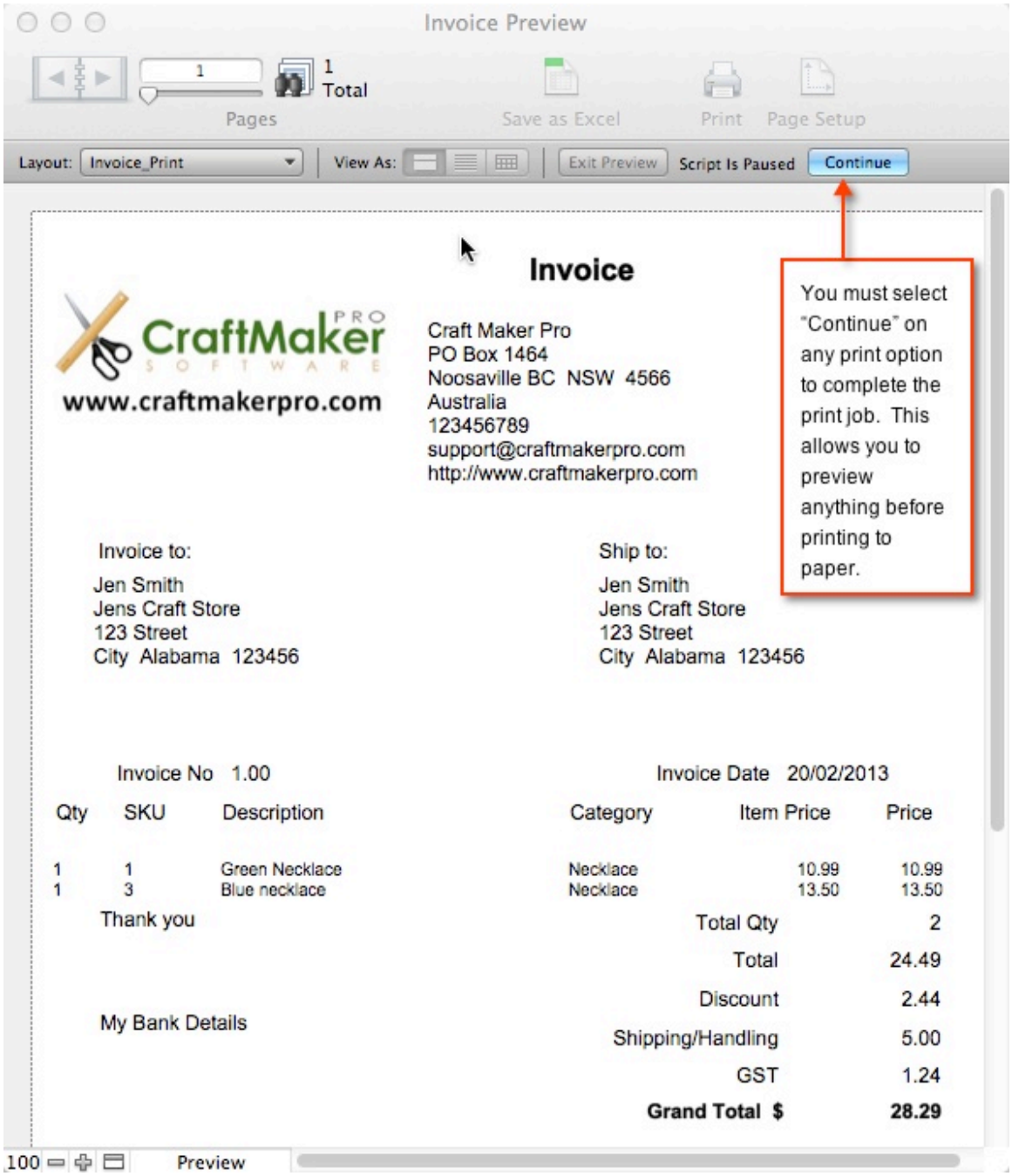


- ***Printing:***

There are many reports you can print with Craft Maker Pro as well as invoices, catalogs and labels.

When printing to allow you to preview what you print before it actually prints out Craft Maker Pro will display a print preview. Once this is displayed you need to select "Continue" in the top right of the print preview window to allow you to finalize printing of the report/catalog/invoice etc. once you have previewed it.

**Fig 21:** **Print Preview Of Reports (Invoice Sample)**



- ***List and Detailed Views:***

List views will show you a summary of all the data that you have for the section that you are in.

For example the list view for "Inventory Parts" will show summary information for all the parts that you have in stock

You can sort the list views by clicking on the Title Category Bars above the data to sort the fields alphabetically or numerically.

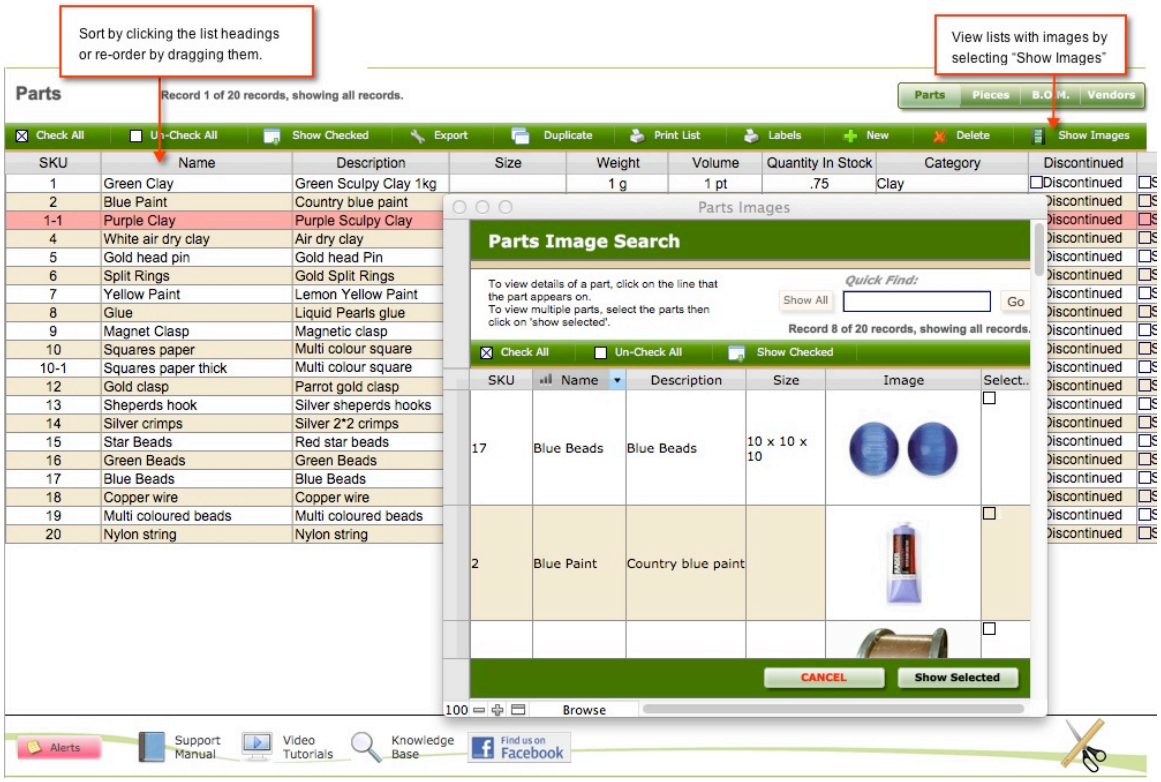
You may drag and drop the columns to re-order them and also resize them as well.

To view the Detailed Information simply click on a line item.

Detailed view will allow you to enter and view more specific data according to the section that you are in.

For example Inventory Parts will allow you to enter information regarding your purchase of new parts including price, date of purchase, alert for stock levels and an image of the part.

***Note*** *– To save time with using the mouse you may use the Ctl key along with either the up or down arrow key on your keyboard to scroll through the list views. To enter the detailed view for the item simply press the Tab key.*



- ***Alerts Summary:***

The "Alerts Summary" can be navigated to from the bottom left Alerts button on most screens or by clicking on the "Main Menu" Tab at the top of the screen and into the "Alerts Summary" button on the main menu page.

The Alerts Summary will display a list of alerts that have been triggered.

You can click on any alert to be taken straight to the section where that alert was triggered.

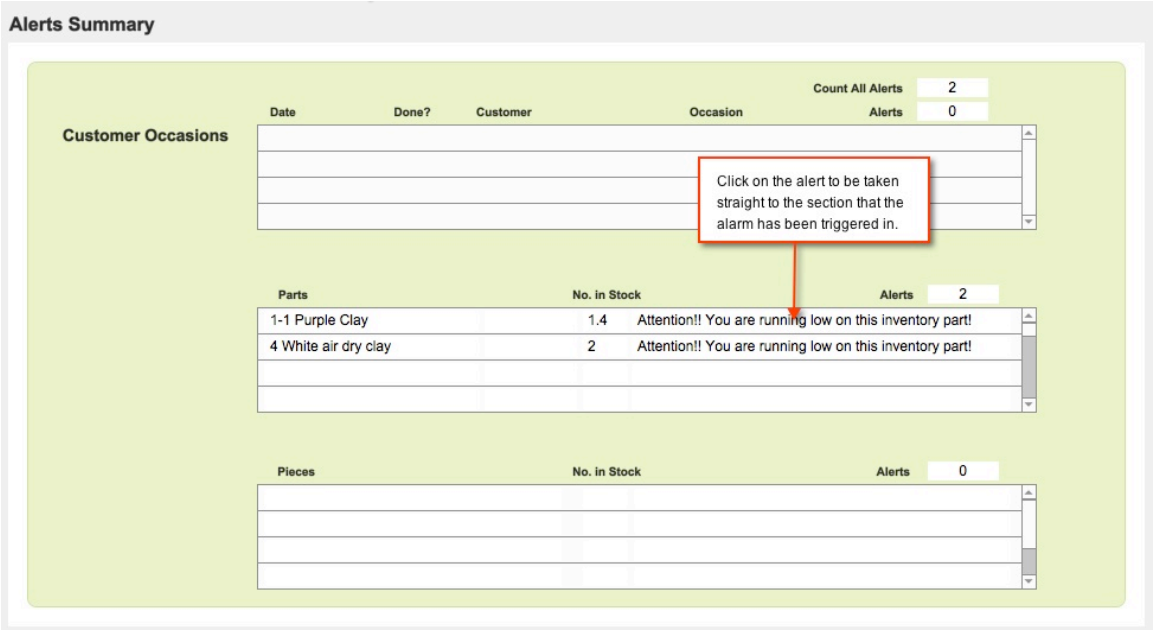
Alerts are set within the detailed sections of "Inventory Parts", "Inventory Pieces" and "Customer Sections".

The Alert Button will turn red when there are items in Alarm and you will also be prompted when starting Craft Maker Pro if there are current Alarms.

**Fig 22:** **Alerts – Inventory Parts List Sample View**



**Fig 23:** **Alerts Section View**




***Note*** *- You cannot set Alerts from within the Alerts Summary section. They may only be set within the detailed sections of "Inventory Parts", "Inventory Pieces" and "Customer Sections".*

- ***Etsy Calculator:***

In the Inventory Pieces Sale Price Tab there is a calculator that will help you to calculate your price for items that you may sell on Etsy.

You can use this to calculate how much you would like to make as a profit after fees and/or including shipping.

**Fig 24:** **Etsy Calculator – Inventory Pieces Sale Price Tab**

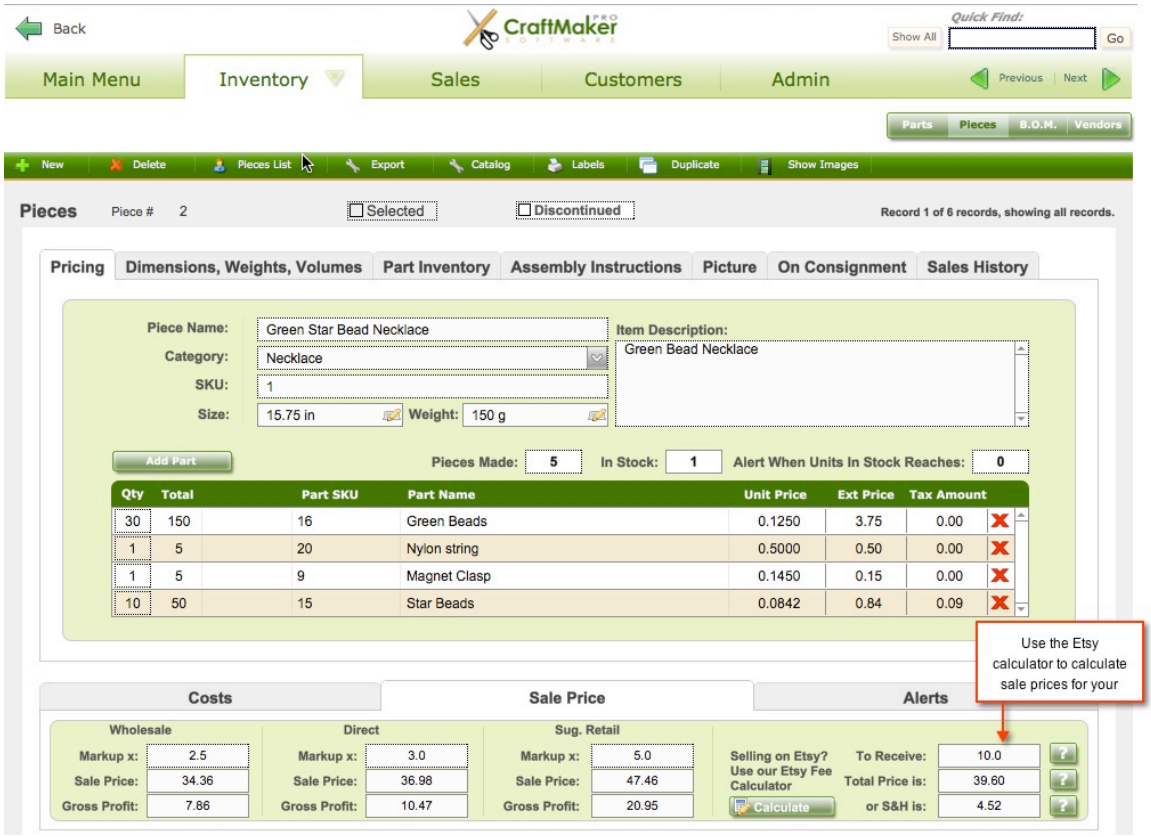


**Fig 25:** **Etsy Fee Calculator – Details**

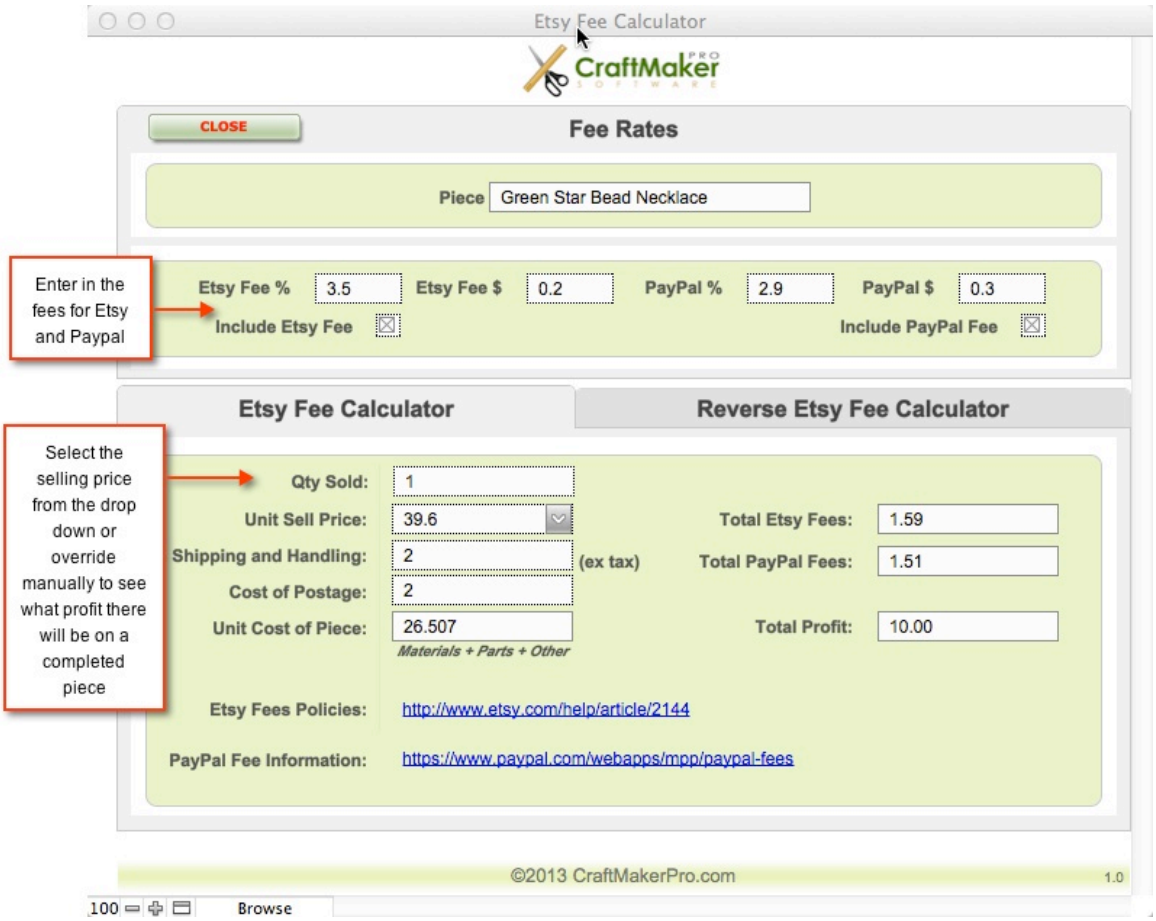


**Fig 26:** **Reverse Etsy Fee Calculator – Details**



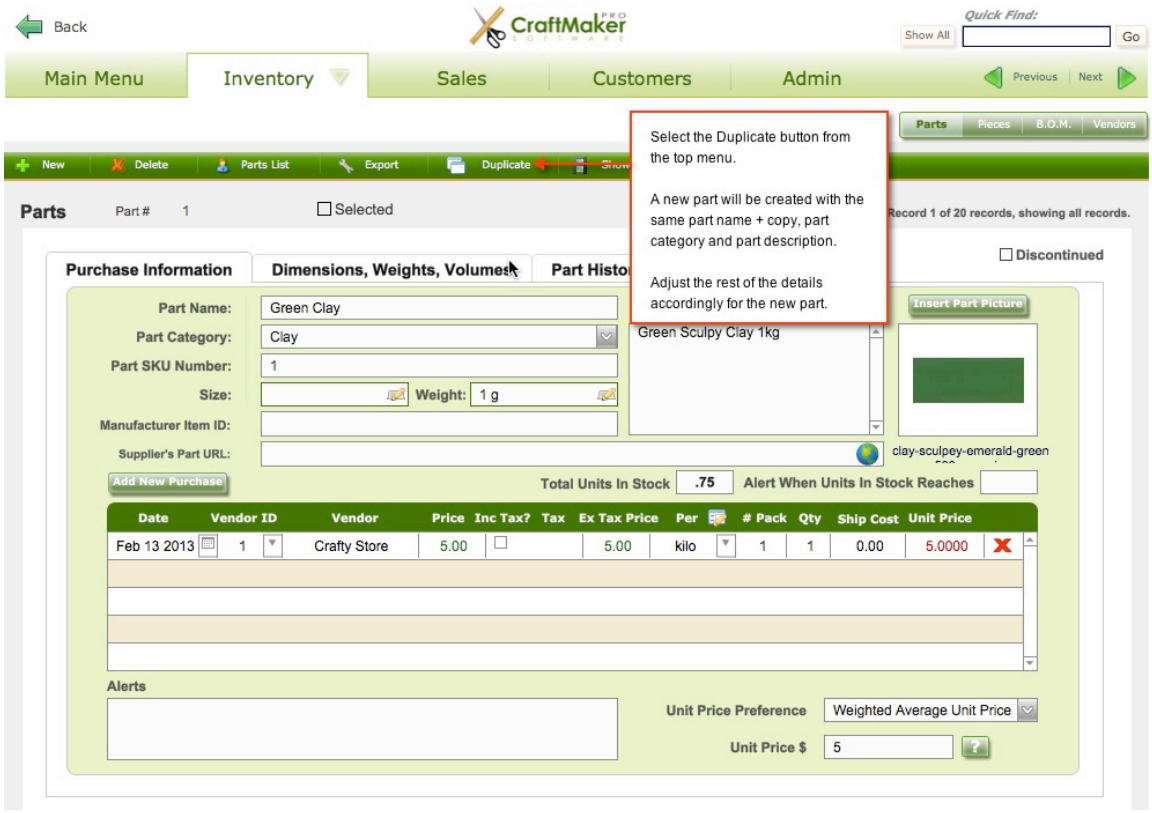
- ***Duplicating Parts:***

If you have several parts that are very similar you can enter in the first one and then duplicate that part to save having to enter in all the details again.

Navigate to the detailed part section for the part that you wish to duplicate.

Select the Duplicate button and then adjust the piece details accordingly for the duplicated part that is created.

**Fig 27:** **Duplicating Parts**



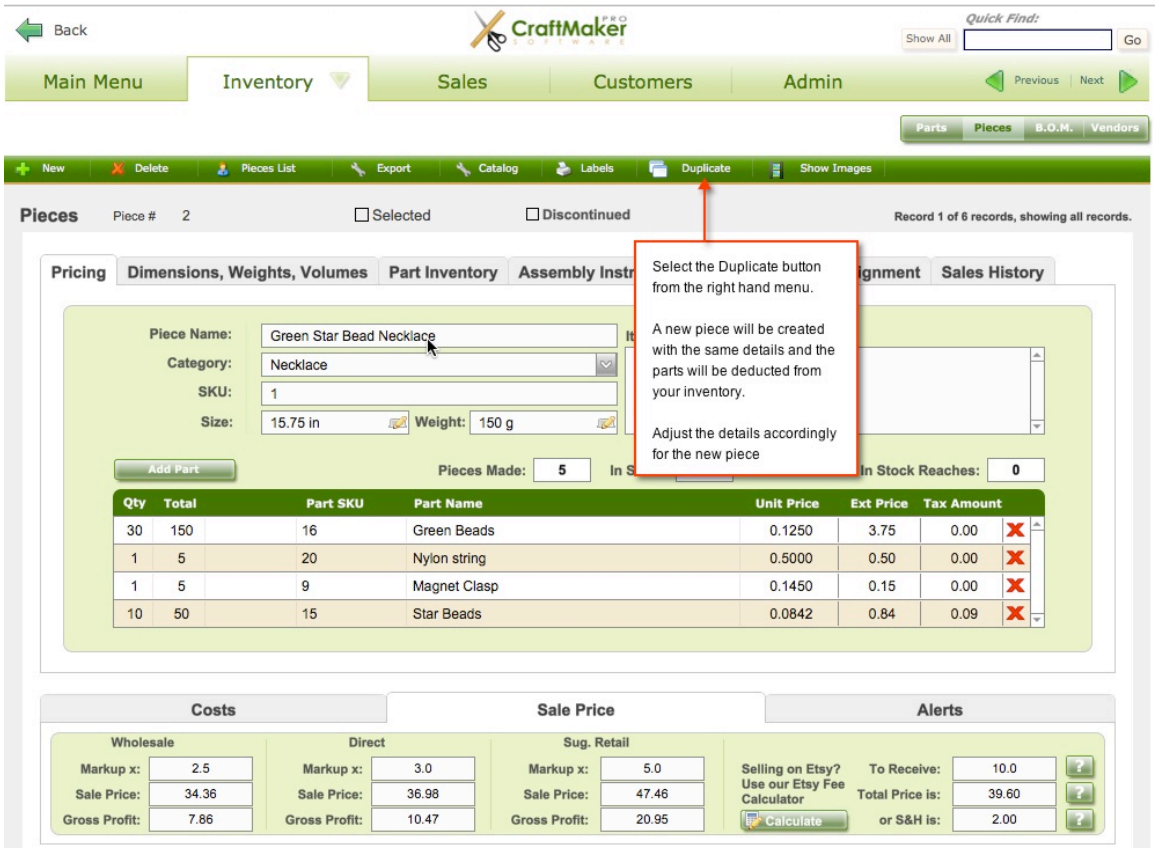
- ***Duplicating Pieces:***

If you regularly make pieces that are similar then you can duplicate a piece and then just adjust the details in the piece after to save having to re-enter all the data.

Navigate to the detailed pieces section for the piece that you wish to duplicate.

Select the Duplicate button and then adjust the piece details accordingly for the duplicated piece that is created.

**Fig 28:** **Duplicating Pieces**



- ***Posting Images to Facebook:***

Facebook is an amazing opportunity to connect with like minded people and Craft Maker Pro will allow you to simply and easily share your image creations with your friends or to your business page Fans.

To get started first of all you will need to enter in your Facebook User URL and connect Craft Maker Pro to Facebook.

**#IMPORTANT** – No user details are shared with us, this is purely to connect your copy of Craft Maker Pro to YOUR Facebook account.

Craft Maker Pro is capable of posting to either your personal page OR your business page/s.

You can post to multiple Business Pages at the same time but if you have entered a Business Page URL then Craft Maker Pro will only post to that and NOT your personal profile.

First of all you must get your personal Facebook User URL and any Business Page URL's that you wish to use.

**In this example we will setup to post to two business pages.**

**Fig 29:** **Getting your Facebook URL**

1 – Log into Facebook.
2 – Click on your home page to view your profile.
3 – Get your personal URL.

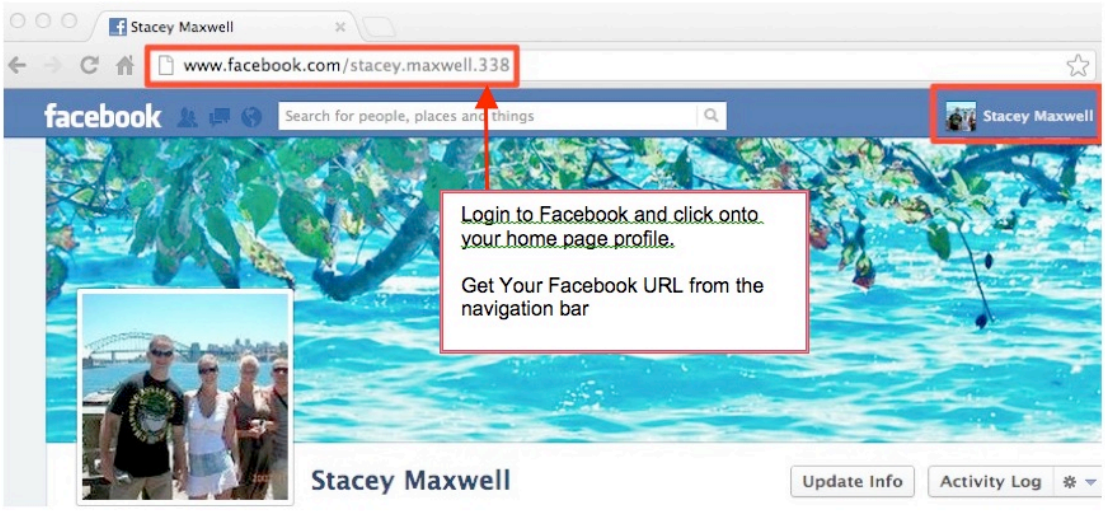


**Fig 30:** **Getting your Facebook Business Page URL's**

1 – Navigate to your Business Page
2 – Make sure you are on the Home Page
3 – Get your business page URL(s)

*The examples below show Facebook page URL's that still have numbers because the Vanity URL's have not been setup.*

*Your Business page URL may look simply like http://facebook.com/YourBusinessName*

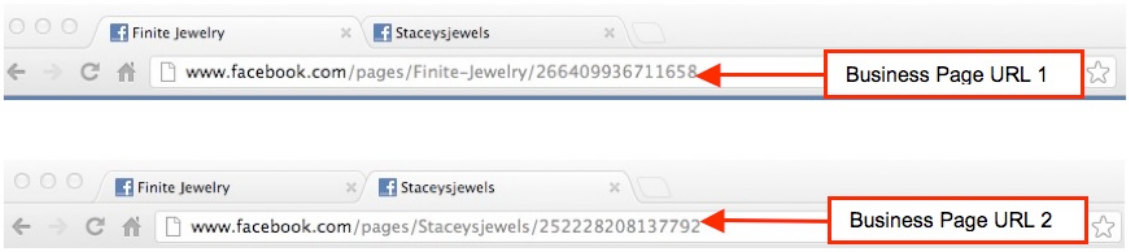


**Fig 31:** **Add your URL's to Craft Maker Pro:**

Now you have your Facebook URL's you need to enter these details into Craft Maker Pro.

You should only need to do this on your initial setup.

Remember that Craft Maker Pro will only post to business pages if you have a business page URL entered but you still need your personal Facebook URL entered to establish that you are the owner.

Navigate to the Pieces Section **>** Detailed Information **>** Picture Tab.

Enter in your URL's in the Facebook Settings Tab.

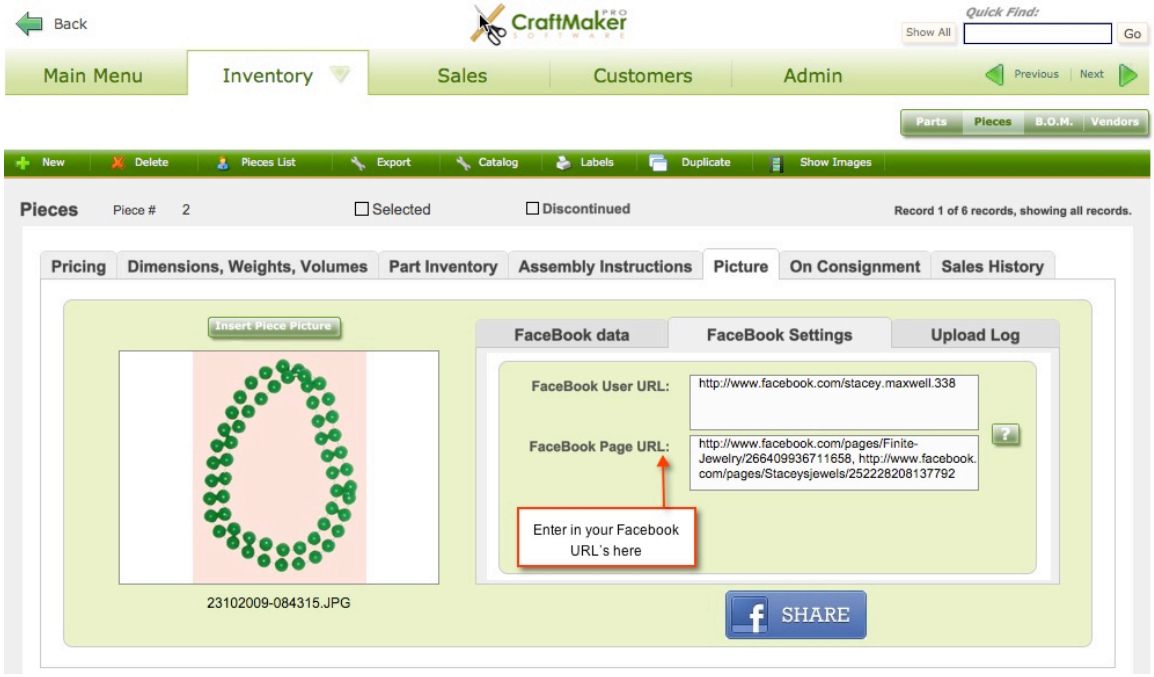


**Fig 32:** **Connect to Facebook:**

Once you have entered your details you will need to verify your connection to our Facebook App.

Just click the "**SHARE**" button and the first time you do this it will verify the connection to the app, which you must agree to for this to work.

**Follow the Two Step Verification Process:**

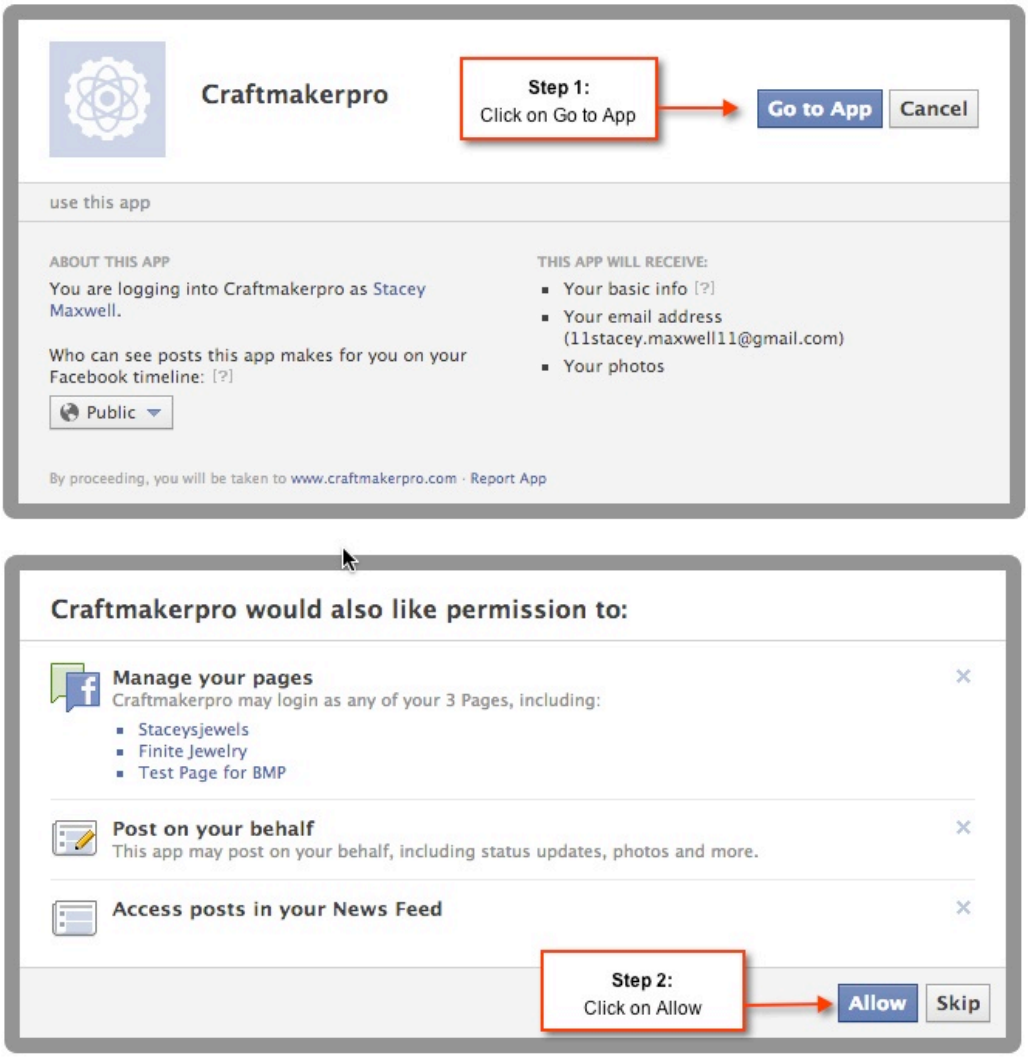


**Fig 33:** **Post to Facebook:**

Now you are connected to Facebook you can post images along with descriptions straight to your Facebook pages.

Edit the details you want to be displayed in Craft Maker Pro to give the Piece a Title, description and also a URL.

The URL field is not compulsory but you can use this to direct users straight to that part in your shopping cart or Etsy store so they can click straight through and purchase.

This is an incredibly powerful feature allowing you to display your items to interested people and direct them to exactly where you want them to go to purchase it!




**Fig 34:** **Your item will now be posted on your Facebook Page(s)**



**# Important Trouble shooting note:**

If you receive an error message that says" "*Your active Facebook account is different from the registered Craft Maker Pro FB user.*" Please check the urls for your account and the urls that you have entered in the settings.

These must match, or in some cases you may need to remove the "s" from the https in the URL.

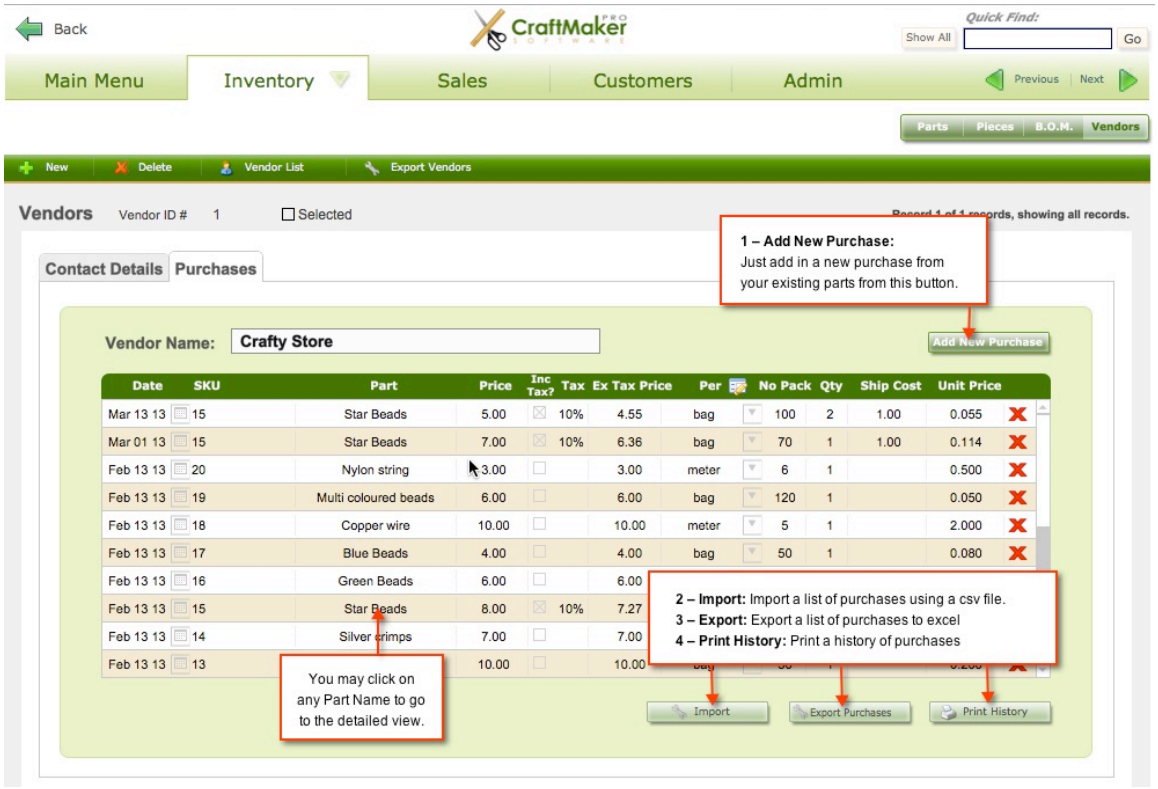
Also if you experience issues with posting timing out please ensure that your image is less than 1mb in size. Images that are larger than this may timeout and not get posted.

- ***Adding Part Purchases In Vendor Screen:***

In the Vendors Purchase Tab you can see a list of the purchases made from that particular Vendor as well as add in new purchases.

There are two ways to add in new purchases.

**Fig 35:** **Detailed View – Vendors Purchase Details**




1. **Add New Purchase Button:**
   This will bring up a list of all current parts that you have in your inventory.
   Simply click on the part that you wish to add a new purchase for and then fill in the details in the Part list view in the Vendor screen.

2. **Import:**
   You can import a list of purchases from a csv file.
   In order to do this you will need to create a csv file that contains a list of your part purchases with headings that match the correct fields to map them to the database.

   ***# IMPORTANT NOTE:*** *If these headings do not match exactly the import function will not work as the fields will not be able to be mapped.*

   To help you do this we have created a blank csv file for you that you can download from here, which contains the headings that you require.

**Heading Description Explanations:**

**- Part Manufacturer Item ID**:
This is the most important field. If this matches a current manufacturer id the purchase will be adding to an exist part in your inventory. If there is no existing matching ID then a new part entry will be created.

If there are duplicate manufacture ids in your csv file for more than one part they will not get imported.

**- Part_Category:**
Enter a category for the part

**- Part_Description**
Enter a part description

**- Part_Name**:
Enter a part name

**- Part_Size**
Enter a part size

**- Part_#_Per**
Enter the total number of parts per bag/pack/wire length etc.

**- Part_Date**
Enter the purchase date

**- Part_Per**
Enter a description for the unit of measure, ie bag/roll/pack etc.

**- Part_Price**
Enter the total price of the purchase

**- Part_QTY_Purchased**
Enter the number of bags/packs/rolls of wire etc. purchased

**- Ship_Cost**
Enter the shipping cost

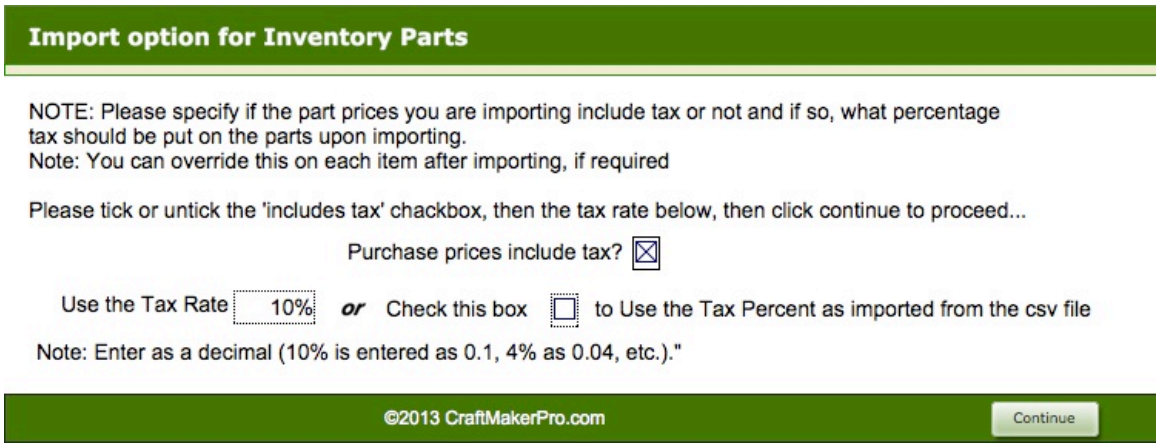
**- Tax_Inc_Flag**
Enter 1 if Tax is included. Enter 0 If tax is not included

**- Tax_Percent**
Enter the Tax amount as a decimal. 0.1 = 10%, 0.5 = 5% etc.

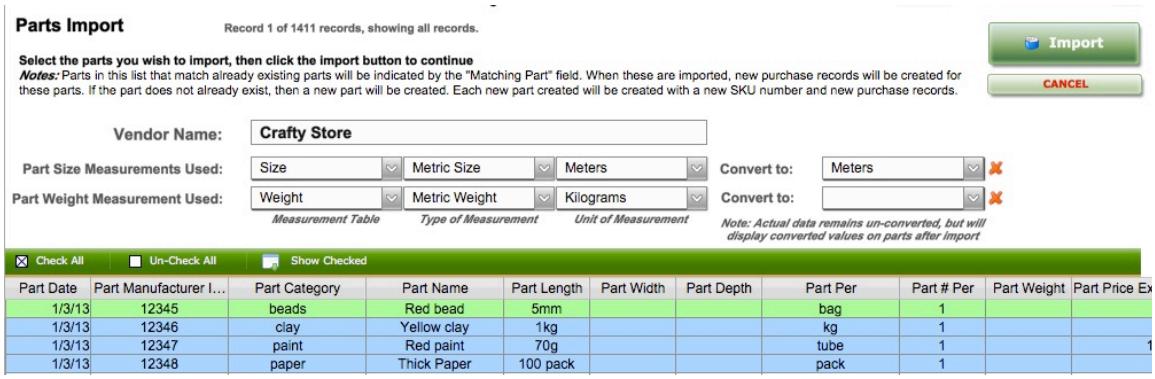
**- Vendor_Order_#**
Enter a Vendor order number (if applicable)

**Import Instructions:**

a) Download a blank copy of the csv file ***from here*** and save this to your local machine.
b) Fill in the details of your purchases as per the header descriptions above and save the file with a new name so you can use the blank template again as required.
c) Select the “Import” button option and select the csv file that you have saved with your purchase information and click ok.
d) Select the correct Tax option to use the tax rate from the sheet or from your Admin settings.

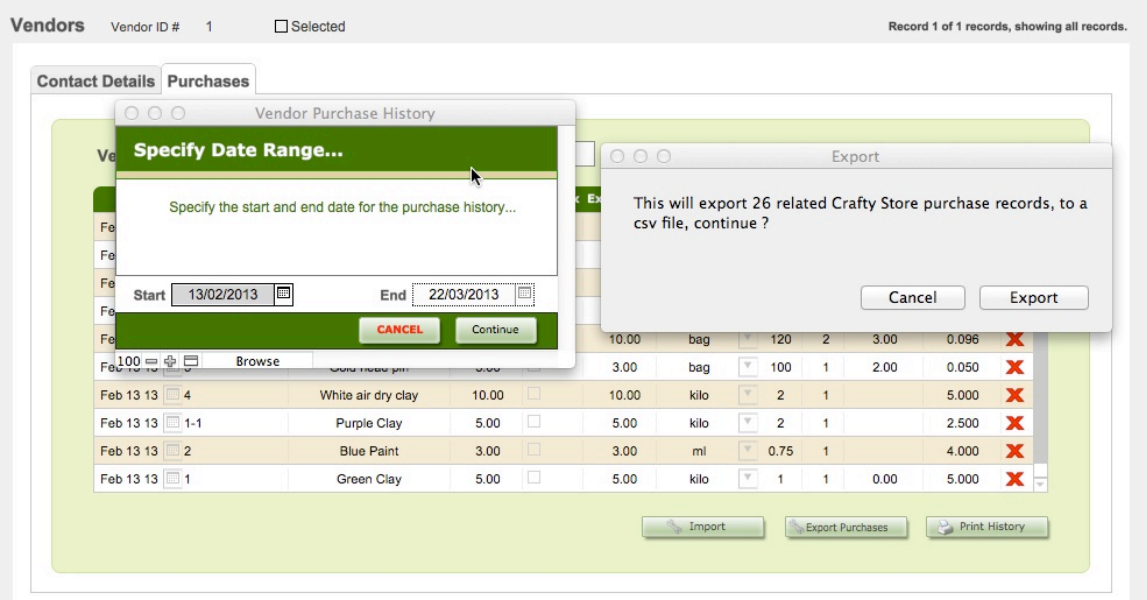



e) Review the information presented in the list view and select Import if correct.

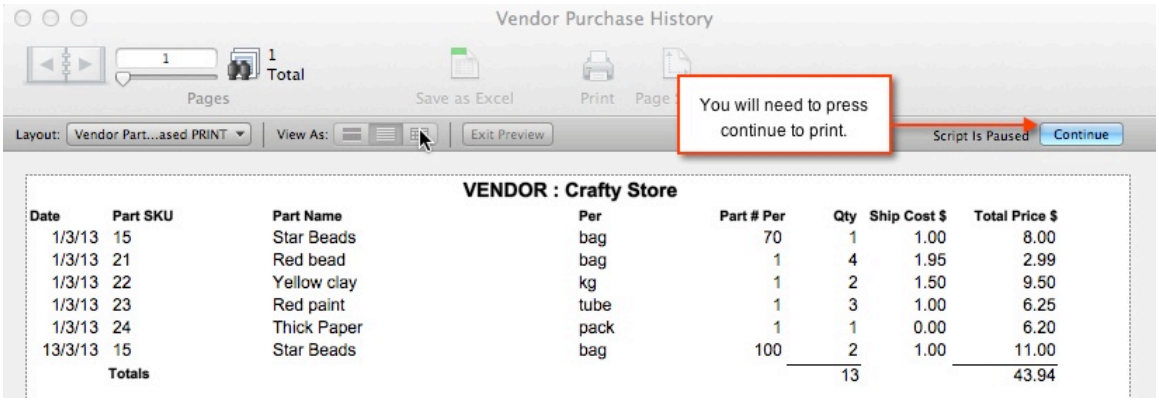



f) Review the final imported data and make changes if required.

3. **Export Purchases:**
   You can export a list of purchase history to excel.
   Simply click the Export Purchases button and an excel file will be created on your desktop containing the purchase history details.




4. **Print History:**
   You can print a history of purchases directly to your printer as well.
   Simply click the History button and print the list that is created on your printer.



- ***Parts Stock Reports:***

You can run detailed reports for exactly what you have in your Parts Inventory at any particular time across a specific date range, particular part, category or just current stock.

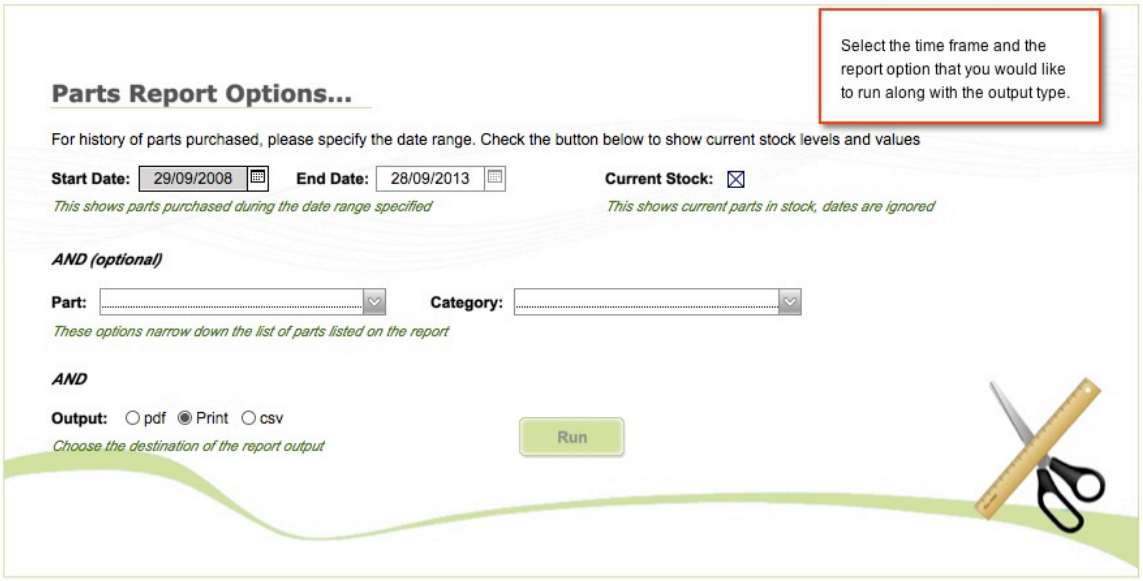
Navigate to the Parts Stock Reports Option Screen.

Select the details for the report that you would like to run and the output option as well.

**Fig 36:** **Parts Stock Report Navigation**




**Fig 37:** **Parts Stock Report options**




***Note** – If you need to clear a part or category field after selecting from the drop down just highlight the text with your mouse and then press the delete key.*

*The report output will be ordered according to the last sort order made in the list view, unless the report is run for a specific date range. i.e. if you want a report sorted by name, sort the list view first by name BEFORE running the Parts Stock Report.*
*If the report is run by a specific date range it will default to sort by sku number only.*

- ***Pieces Stock Reports:***

You can run detailed reports for exactly what you have in your Pieces Inventory or have sold at any particular time across a specific date range, particular part, category or just current stock.

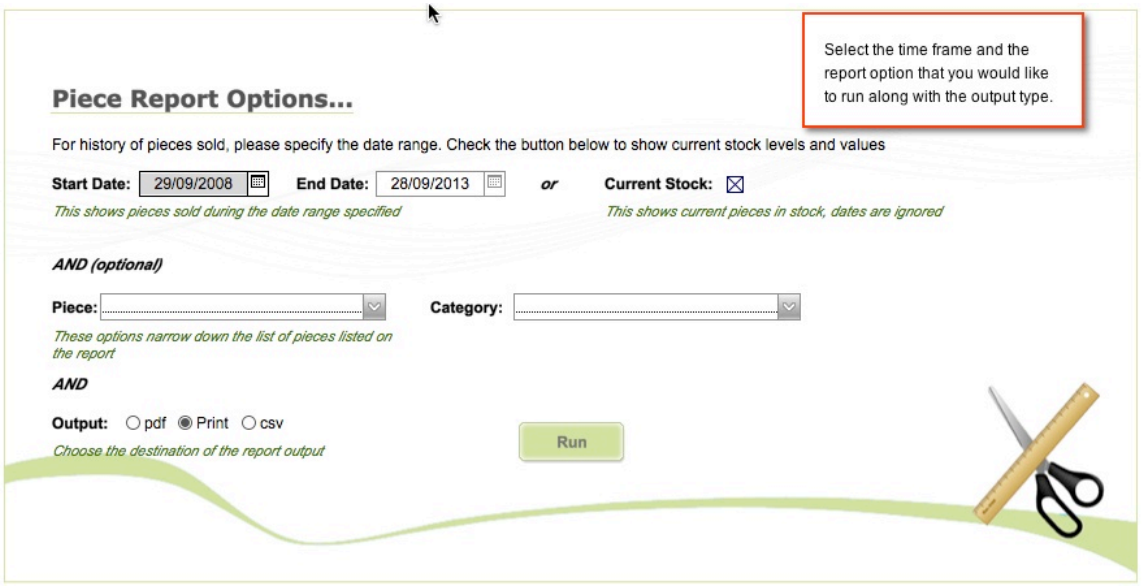
Navigate to the Parts Stock Reports Option Screen.

Select the details for the report that you would like to run and the output option as well.

**Fig 38:** **Pieces Stock Report Navigation**




**Fig 39:** **Pieces Stock Report options**




***NOTE –*** *If you need to clear a part or category field after selecting from the drop down just highlight the text with your mouse and then press the delete key.*

*The report output will be ordered according to the last sort order made in the list view, unless the report is run for a specific date range. i.e. if you want a report sorted by name, sort the list view first by name BEFORE running the Pieces Stock Report.*
*If the report is run by a specific date range it will default to sort by sku number only.*

- ***Profit / Loss Report:***

You can run detailed or overview P&L reports for any period of time you would like to select, P/L reports are ALWAYS sorted by date.

Navigate to the Profit/Loss Report from the main menu screen.

You can select the date period that you would like to run the report for and also which type of report you would like to run.

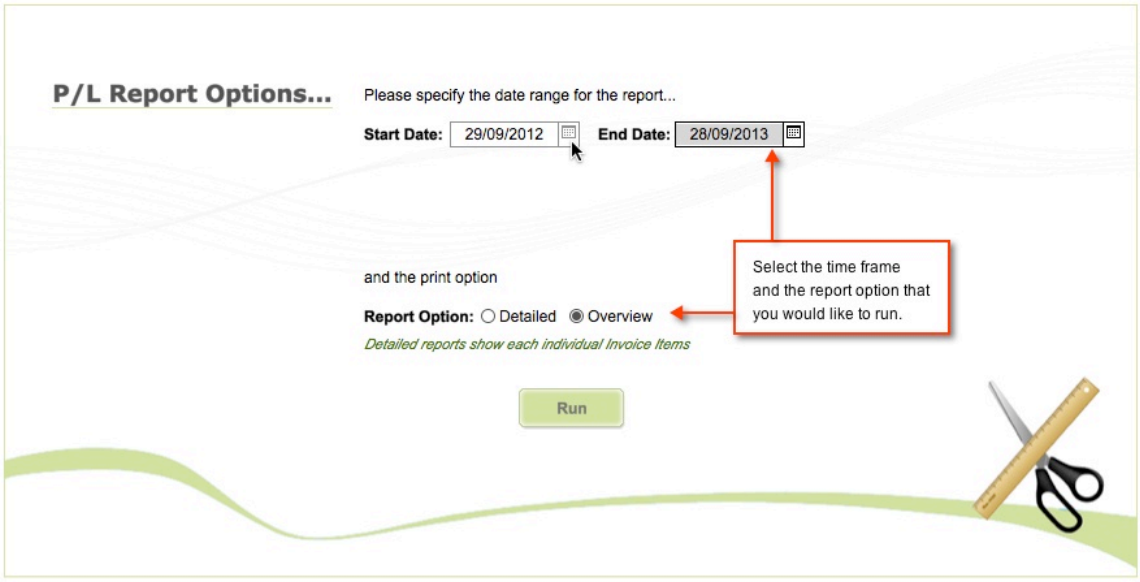
1. **Detailed** – shows all pieces created within the date period
2. **Overview** – shows a summary of each month for the time frame selected

***Note** – if any parts have been deleted from the inventory which were used to create a piece the P&L statement may not be correct. Pieces which may have incorrect P&L calculations will be flagged on the report.*

**Fig 40:** Profit/Loss Report Navigation




**Fig 41:** Profit/Loss Report Options



- ***Dimensions Weights and Volumes Tables:***

For the parts that you purchase Craft Maker Pro has a dimensions, weights and volumes tab that allows you to record the exact measurements of any part purchases.

It is important to note that the information entered into the dimensions, weights and volumes tab is not related to the actual part purchase quantity details for the inventory.

The dimensions weights and volumes are only used to help calculate the weigh/volume or a completed piece form the parts that have been used to create it.

If you purchase items that are supplied in one measurement to you and you need to convert them to another measurement, i.e. kg to lb., you can use the built in convertor to do this for you.

**Fig 42:** **Dimensions weights and volumes calculator – parts example**

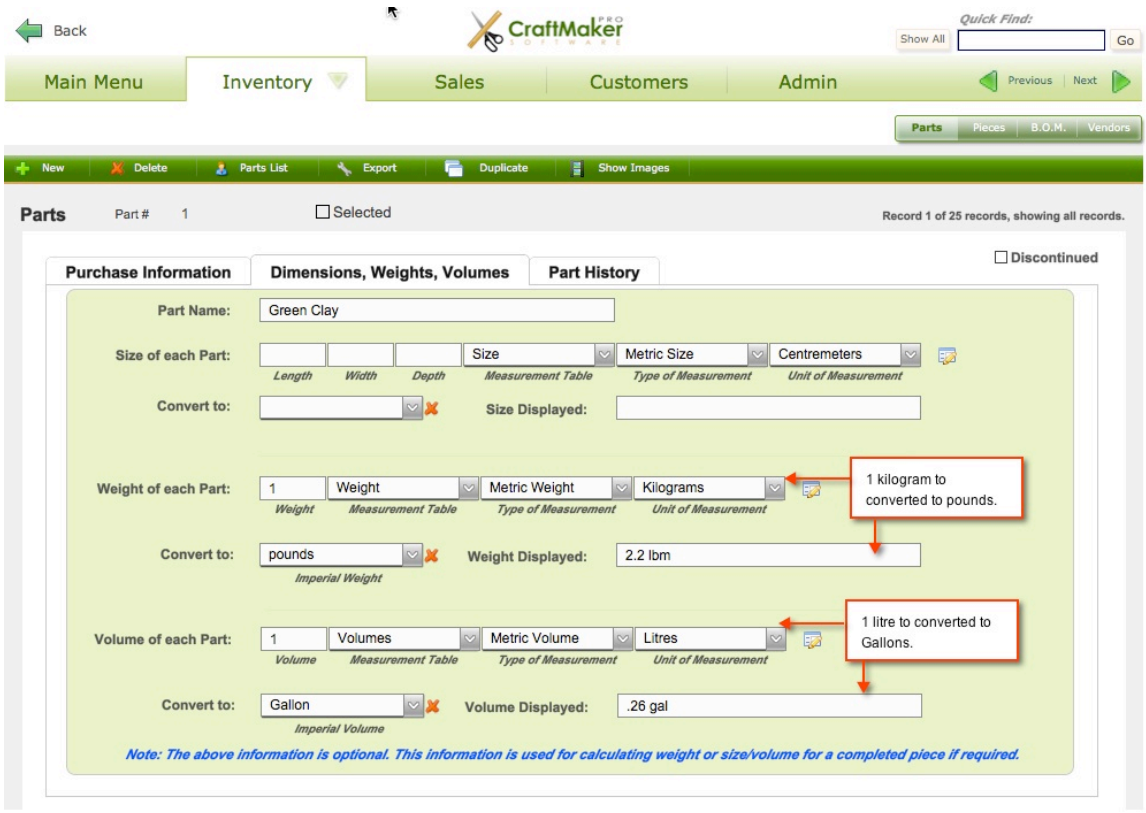


**Fig 43:** **Dimensions weights and volumes calculator – parts example sizes**

For the sizes there are three dimensions that can be entered, Length, Width and Depth. You do not need to enter in all dimensions as some parts will only have one dimension, such as wire or string which will only have a length.

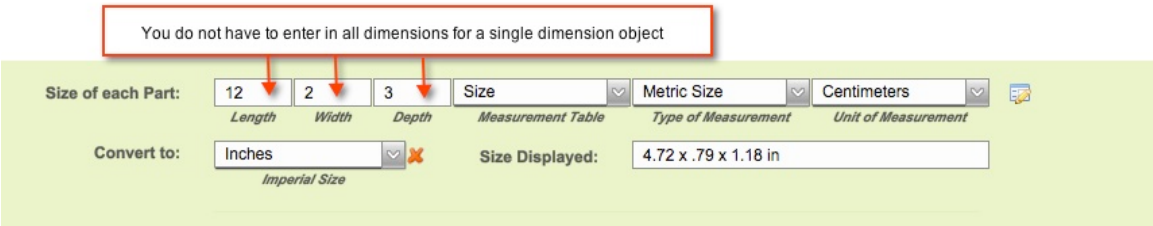
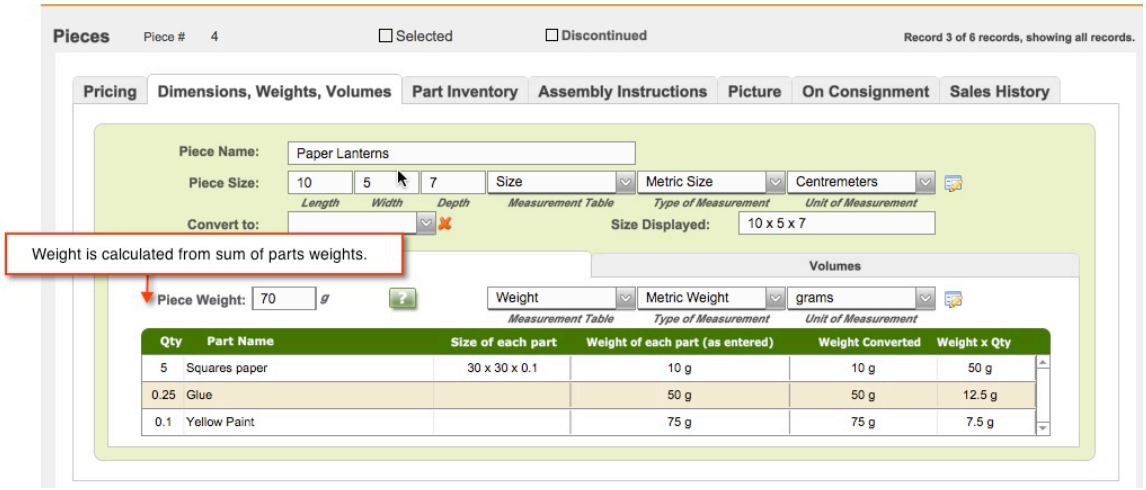



**Fig 44:** **Dimensions weights and volumes used in pieces**

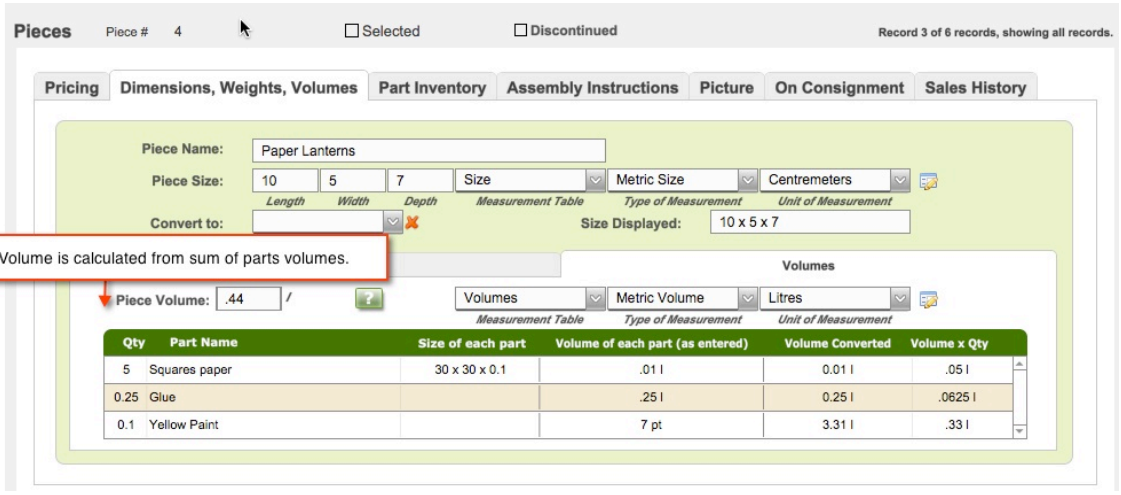
When you add parts to a piece Craft Maker Pro can use the weights and volumes of the parts to calculate a sum total.

These may also be converted but it is far more accurate to try and keep all parts in a similar measurement unit if possible.

**Weight Example:**

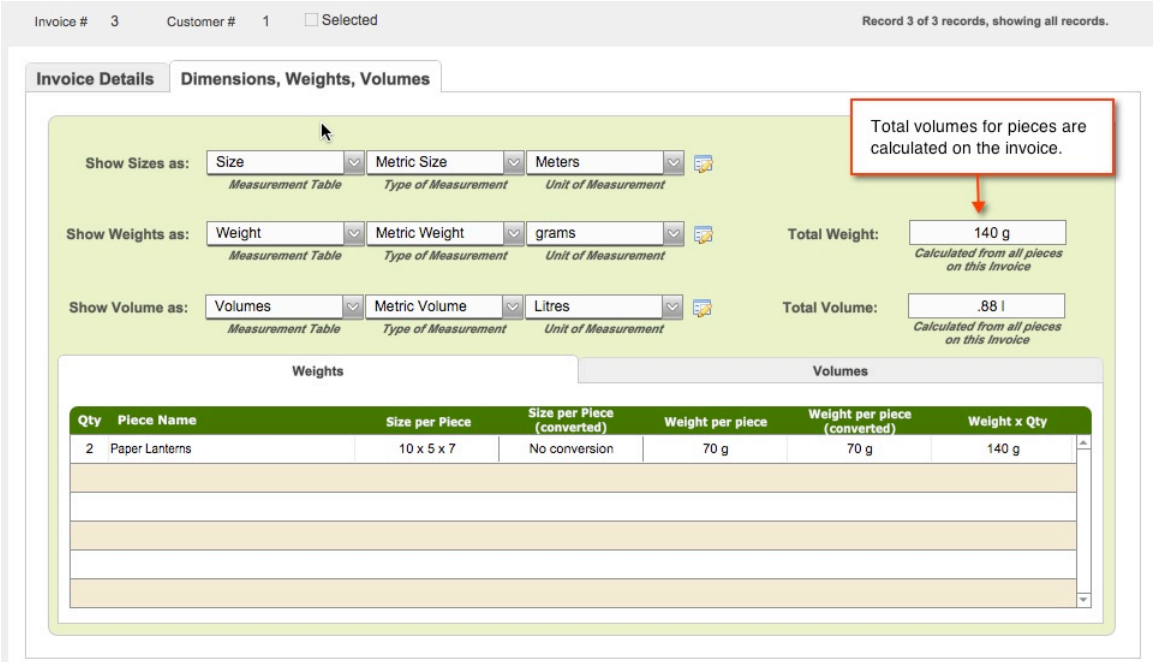


**Volume Example:**




These details are then displayed in the Dimensions Weights and Volumes Tab for any invoices so the data can be used to calculate postage if required or used to display with an items sale details and catalogs.

**Invoice details:**



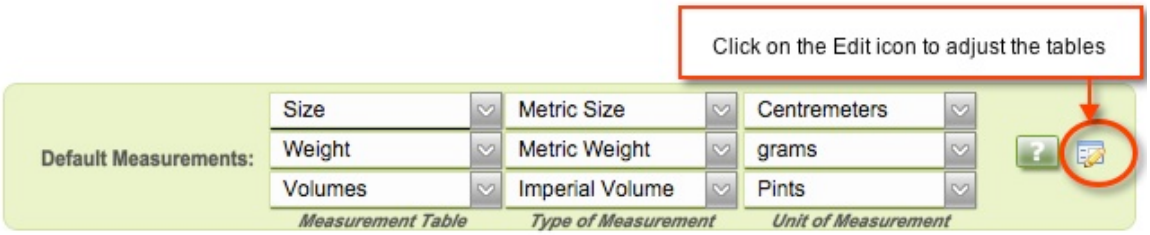
- ***Editing Weight Volume Size Conversion Tables:***

The Dimensions, Weights and volumes tables can be edited to put in other values as required.

In each area where there is an option for a weight, volume or measurement you will see a small edit symbol of a pencil on paper.

Clicking on this will bring up the table for editing.

**Fig 45:** **Editing conversion tables – Admin Example**



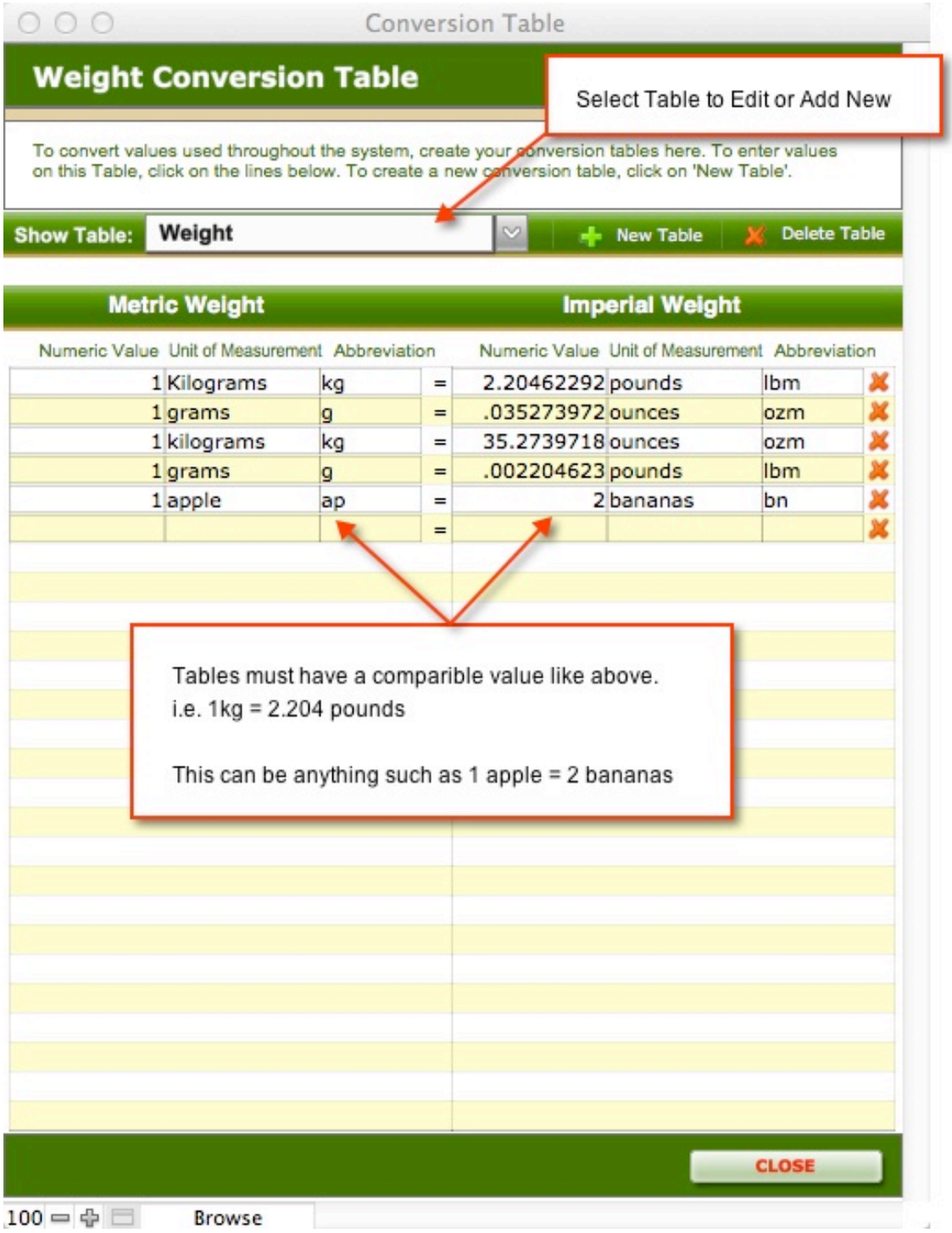

Once the table opens up select the table you wish to edit from the drop down menu.

You can also add new tables or delete tables.

When adding new tables you need to add them under one of the existing tables for Size, Weight or Volume.

You can add in new values for any additional type of measurement that you require.

**Fig 46:** **Editing conversion tables – Weights Example**



- ***Quick Find:***

Craft Maker Pro has an advanced quick find facility allowing you to search within the section that you are in.

As you type any matching cells will be highlighted in yellow (unless instant highlighting is turned off in the Admin section).

Hit enter once to highlight and then hit enter a second time to filter the list

Click Go or press Enter to filter the list to only show rows that contain highlighted cells.

If there is only one item within the database that matches the Quick Find query Craft Maker Pro will go straight to the detailed view of that item directly to the detailed view for that item after pressing Go or the Enter key.

***Note** – you can search for fields that are not only displayed within the list view and Craft Maker will filter the list view according to data that may only be displayed in the detailed view.*

**Fig 47:** **Quick Find**



- ***Catalogs:***

You can create catalogs of you pieces directly from Craft Maker Pro.

In the Inventory Pieces list view select "Catalog" on the right hand toolbar.

This will bring up a new screen with option for how many pieces you wish to print per page and also which price point you wish to be displayed.

Select the appropriate options for your choice and also the pieces that you wish to be displayed in your catalog and select continue.

Your catalog pages will be displayed on screen and a pop-up window will ask you if you wish to print the catalog.

To print a copy of the catalog directly select "print" and the print on your normal printer settings.

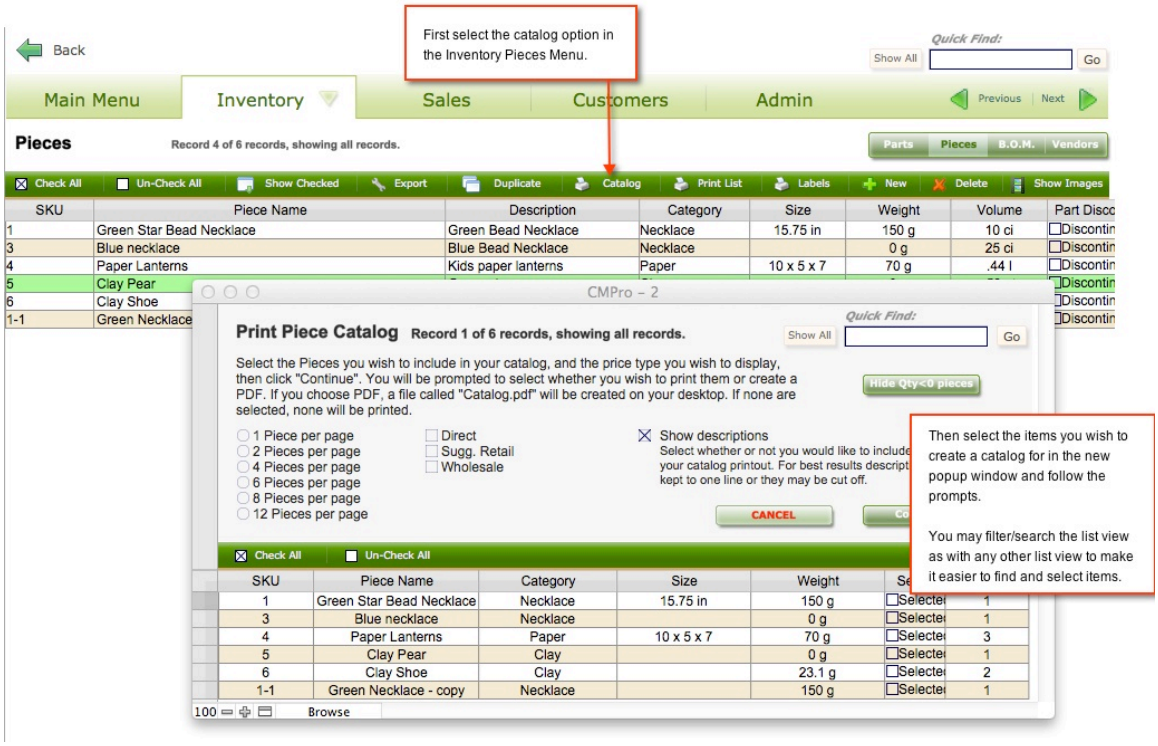
If you would like to save the catalog as a pdf document on a windows machine you will need to install a pdf writer to your print drive. This is a very easy thing to do. We recommend using http://www.primopdf.com/

Install the software as directed and now if you wish to save your catalog as a pdf when selecting print in the Printer option box that will come up select "PrimoPDF" as your printer of choice.

Follow the prompts in the pop up boxes that follow and save the pdf document with a filename that is suitable for your catalog and in a location on your PC that you are able to find it easily again.

***Note -*** *If you wish to print a catalog in a particular order then sort the list first in the order that you wish it to print by clicking on the headers. You can sort by any field in the list view to print your catalog by SKU, Piece Name, Price, Category etc. etc.*

**Fig 48:** **Catalog Print**

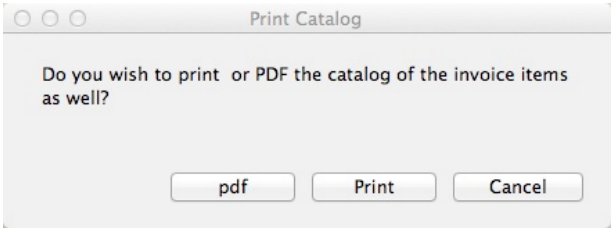


- ***Invoice Catalogs:***

You may print a catalog of the parts that are on an invoice as a summary for your customer.

Simply print the invoice and follow through the print option prompts until you get to the final option, which will ask if you would like to print a catalog of the invoice items.

**Fig 49:** **Invoice Catalog Print**



- ***Labels:***

You can print address price and file labels directly from Craft Maker Pro with your Dymo LabelWriter 400.

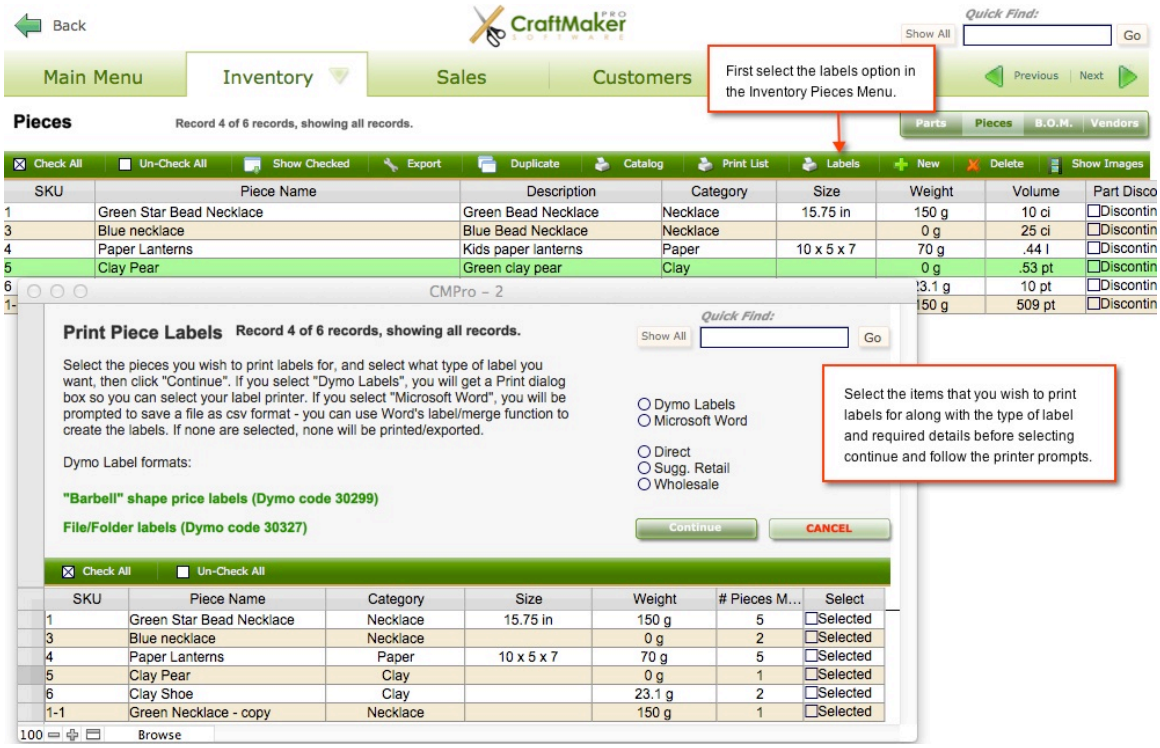
Craft Maker Pro has been configured to use the following Dymo Labels;
Barbell Shaped Price Labels - Dymo Code 30299
File/Folder Labels - Dymo Code 30327

There are several sections where you will see the Print Labels option on the navigation menu at the top. These are:

- Inventory Parts
- Inventory Pieces
- Customers

Craft Maker Pro will also prompt you when you print customer invoices for address and shipping labels automatically.

**Fig 50:** **Label Print – Inventory Pieces Sample View**




You can also Mail Merge to print labels of your size and choice by exporting data, (as explained in the next section). This will allow you to print labels as you choose using a normal printer and of the size and quantity of your choice.

If you are unfamiliar with Mail Merge follow the Microsoft Tutorial.

- ***Export Data:***

Craft Maker Pro allows you to export data into Microsoft excel format documents so that you can import data into other programs of your choice.

In both the "List View" and "Detailed View" of all sections there is an export button. Click on this button and select the data that you wish to export. This will create an appropriately named excel file on the desktop of your computer.

In the list view you need to select the items from the list that you wish to select. You can also select items when in the detailed view by selecting the check box in the top left hand corner.

If nothing is selected no data will be exported.

The data exported from the list view will be the same as you see in the list view so if you wish to have it exported in a particular order the arrange the columns and/or filter them as you wish to see the exported data before exporting.

You can use these files to import data into any other programs that you require.

You may also make use of the export data function to mail merge any data that you may require into any format for data storage or presentation of your choice.

If you are unfamiliar with Mail Merge follow the Microsoft Tutorial.

**Fig 51:** **Export data – Inventory Parts Sample View**

In order to export data you first need to select the items that you would like to export from the list view.

You may select items one by one or use the “Check All” button to select all the items from a filtered list.

You may filter on multiple searches and continue to check as many items as you wish until you are ready to export your data.



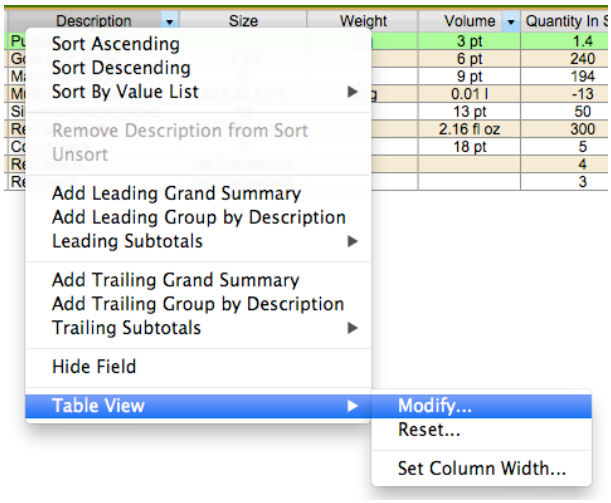
- ***Advanced List Views:***

In the list view you may also add or remove fields to show more or less data in the list view. You can use this to totally customize the list views in any section. Any additional fields that are added will be exported to excel as well.

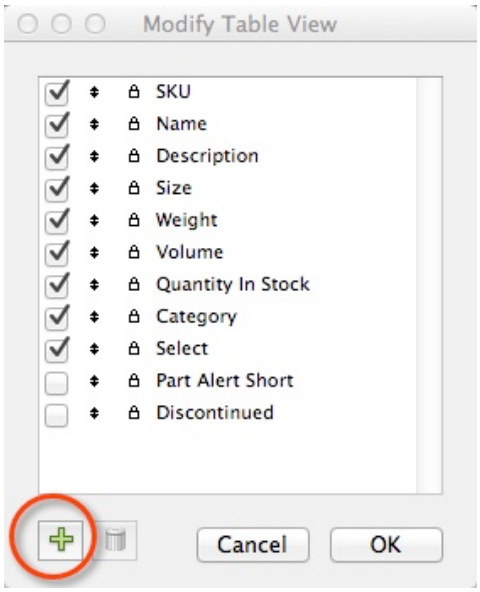
**Fig 52:** **Export data with advanced list views**

**To add additional fields:**

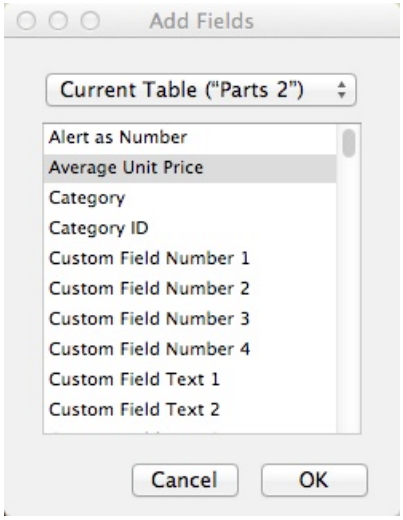
1. In any list view Right Click on the Title Headers for PC, “Ctl Click” for MAC.
2. Select Table View => Modify from the popup




3. Select the Green + sign



4. Select the required field/s from the new popup – Click Ok




5. You may then re-arrange the list view order by dragging the columns to the preferred order.

   Exporting data will then export the fields shown in the list view as arranged.

   To remove fields from the list views simply unselect them by un-ticking the box next to the field name in step 3.

- ***List Subtotals:***

In list views you can group data by any field:

1. In List View right-click the column heading for the field that you want to use for grouping the data, then choose Add Leading Group by <field name> or Add Trailing Group by <field name>.

   For example, If you want to display the summary for your parts in stock and add a summary row at the end of the records for each part, choose Add Trailing Group by Part_Quantity_In_Stock. If you want to add the summary row before the records for each part, choose Add Leading Group by Part_Quantity_In_Stock.

   Adding a leading/trailing group automatically sorts the records by the field that you used for grouping the data. For example, the parts will be listed in alphabetical order.

**Fig 53:** **Subtotals – Leading Groups**




2. If you want to change the color of the summary row for each group, right-click the left or right margin of the summary row and choose a color from the Part Color shortcut menu.

3. If you want to display the name of each group in the summary row, right-click the left or right margin of the summary row, then choose Add Group Field (<field name>).

***Note*** *- You can add leading/trailing groups for multiple fields to display different categories for each group of records.*

**To remove a group:**

- In List View right-click the column heading for the field that you used for grouping the data, then choose Remove Leading Group by <field name> or Remove Trailing Group by <field name>.

**To display subtotals:**

1. In List View right-click the column heading of the field that you want to display subtotals for.

2. Choose one of the options from the Leading Subtotals or Trailing Subtotals shortcut menus.

| Select | To |
|---|---|
| Total | Calculate the total of values in the field. |
| Running Total | Show the cumulative total for the current and all previous sorted groups. |
| Average | Calculate the average of values in the field. |
| Count | Count the number of records that contain a value for the field. For example, if a field contains 100 values (one value for each record), the result of the count is 100. |
| Running Count | Show the cumulative count of the current and all previous sorted groups. |
| Minimum | Show the lowest number, or earliest date, time, or timestamp for a field. |
| Maximum | Show the highest number, or latest date, time, or timestamp for a field. |
| Standard Deviation | Find how widely the values in a field differ from each other. This option calculates the standard deviation from the mean of the values in a field. |
| Standard Deviation By Population | Calculate population standard deviation |
| Fraction of Total | Calculate the ratio of the value in the field to the total of all the values in that field. (For example, find what fraction of total sales can be attributed to each salesperson.) |

A new row in the beginning of the table (for leading) or at the end of the table (for trailing) displays the subtotal for the field.

If you have also added leading or trailing groups to the table, the group summary rows also display the subtotal for each group for the specified field. You have to choose a leading subtotal to display subtotals for leading groups and a trailing subtotal to display subtotals for trailing groups.

3. (Optional) To change the color of the row that displays the subtotal for the field, right-click the left or right margin of the row, then choose a color from the Part Color shortcut menu.

**To remove subtotals from Table View:**

1. In List View right-click the column heading of the field that displays subtotals.

2. Deselect any options that you want to remove from the Leading Subtotals or Trailing Subtotals shortcut menus.

3. Alternately if you cannot find which headers you actually added the Subtotals to just select Reset Table View from the menu after right clicking in the header fields

***Note** - Removing subtotals from List View does not remove the subtotal summary fields from the database. To remove the summary fields from the database, choose File menu > Manage > Database, then choose the summary fields to remove and click Delete.*

*Once you close or exit the program any grouping will be lost and will have to be re-done.*

- ***Print List Views:***

In Craft Maker Pro you have the ability to print any list view directly as you see it on the screen.

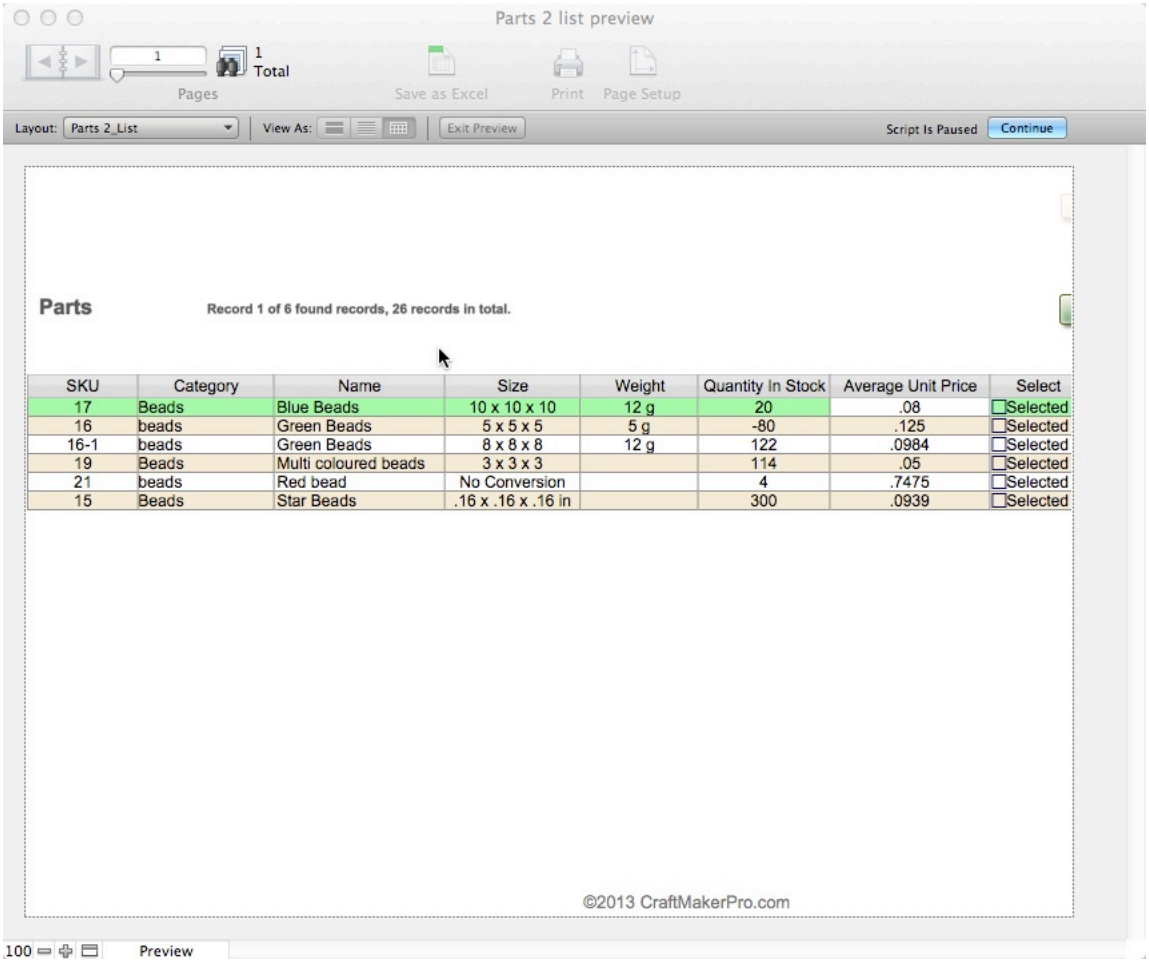
If you create a list view to show you exactly what you need you can then quickly and easily print a direct copy by clicking on the “Print List” option in the menu navigation.

This is best done if you have customized the list view using the Advanced List Views and/or Subtotal List Views options that are described above.

**Fig 54:** **Print List Button In Menu**



**Fig 55:** **Print List View Example filtered for Beads and particular headings**



- ***Slow Response Scrolling Through List Views:***

**Option 1 – Turn off Qty/Item Pieces in list views**

If you have a lot of data in your parts or pieces inventory you may find that the list view refreshes as you scroll through causing it to be a little slow.

If this happens try removing the Qty/Item pieces column from the list view.

As this is a calculated field Craft Maker Pro has to "refresh" the list view as you scroll though it in order to be able to display this data.

Removing it from the list view stops the need for the list to be refreshed and should help to speed up the scrolling process.

In order to remove the Qty/Item column from the list view simply modify the list view as per the instructions in the previous section Advanced List Views and un-tick the Qty/Item field

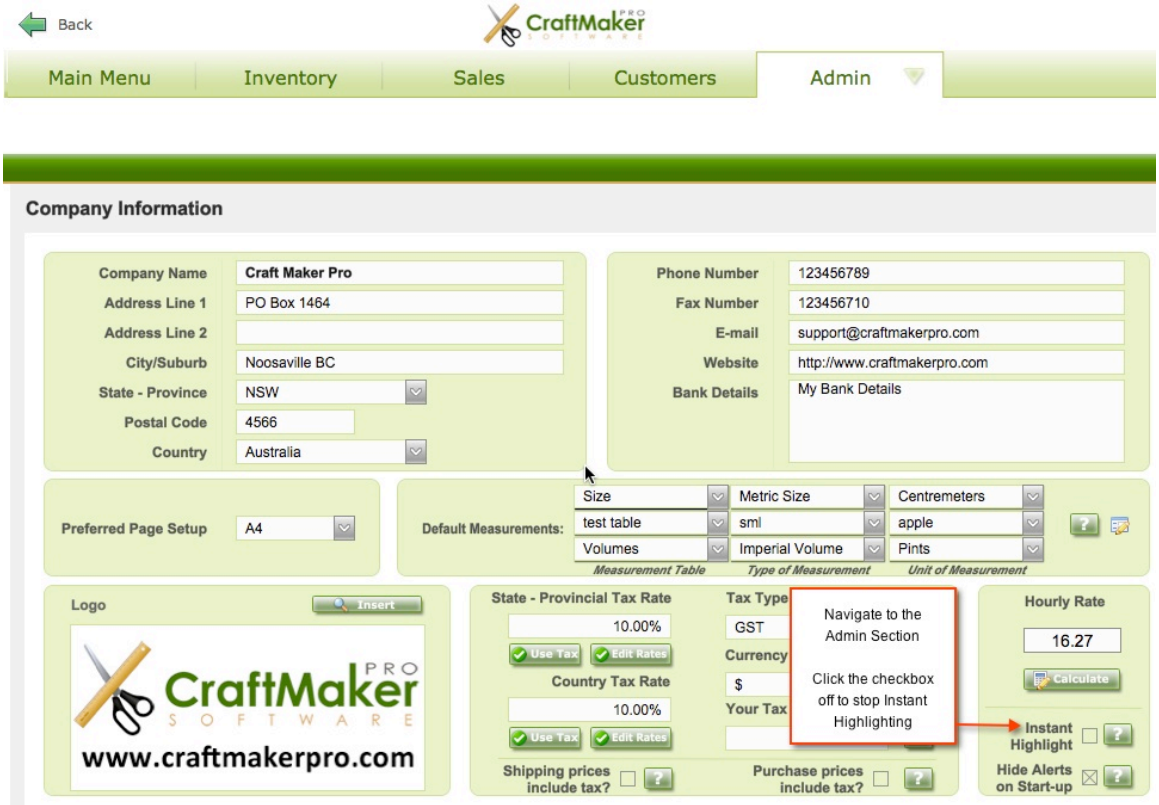
**Option 2 – Turn Off Alerts Highlighting**

Another alternative is to remove the instant highlighting for Alerts. Since this gets re-scanned each time you load a list view to see if there are any alerts in the list view if you have a large list this will get scanned constantly for alerts.

Turning off Instant Highlighting will stop this scanning and improve speed.

You can do this in the main Admin section.

**Fig 56:** Turn Off Alerts in Admin Panel



- ***Managing Waste Inventory:***

There are times when you purchase parts that there may be damaged goods within your purchases. If this is just a few parts within a pack of hundreds these are often just discarded and left unaccounted for.

If you would like to manage your waste so that you know exactly what you have written off as waste for the end of year tax returns we would suggest doing the following.

Create a “Fake” Piece. This may be one piece or several depending on how many items of waste you may have.

If it is just one piece name it accordingly – something like “Waste Materials”.

If you have a lot of waste that you need to account for you may need to create several pieces so you can categorize your waste. In this case we would suggest creating the pieces with a common denominator in the name. i.e.

- Waste beads
- Waste string
- Waste paper…. etc.

This will make it easier to find the “Fake” piece/s in your list views at a later time.

Now any time that you have waste material you can add it to your “Fake” piece. This will create one (or more) “Fake” pieces that have been created from your waste material allowing you to account for the stock.

You may now run a BOM for your fake piece/s to see how much waste you have had during the month/year.

- ***Backing Up:***

**** We would recommend that you regularly backup your data and store a copy of it on a separate hard drive or burn a copy to cd. Please see further details below how to automate this process with Dropbox and automated folder synching.

You can easily create and restore backups of your data from the Admin Section.

To create a backup simply click on the Backup Button.

A new backup will be created and displayed in the Archives Window.

The file name of the backup is formatted day:month:year:time so a backup created on the 2nd August 2012 at 9:09am would be 02082012.99.BAK

If you are unsure of which one is the latest backup simply check the backup folder and sort by date to verify the latest copy

To restore a backup simply click on the red push pin next to the backup file name in the Archive window.

If you need to restore a backup onto another computer the backup file can be found under the Craft Maker Pro Directory where you saved the program in the Backups Folder.

Copy over the file ***before*** starting Craft Maker Pro. The backup will only show in the archive section if it was copied there prior to starting Craft Maker Pro.

***** Very Important:***
If working across two computers you need to be extremely careful when restoring data to another machine, as all old data will be over written. If you have made any changes that are not on the backup you are going to restore they will be lost as the backup facility does not merge the data but completely installs the backup file.

***You may also backup the entire program by copying the entire Craft Maker Pro folder to a cd or other external hard disc for safe keeping or transfer to another computer.***

***If you have a problem with your computer and lose your data we can always send you a new copy of the Craft Maker Pro but you must be responsible to backup your own data as if you lose that there is nothing we can do.***

**Fig 57:** **Backup Data – Admin Section**

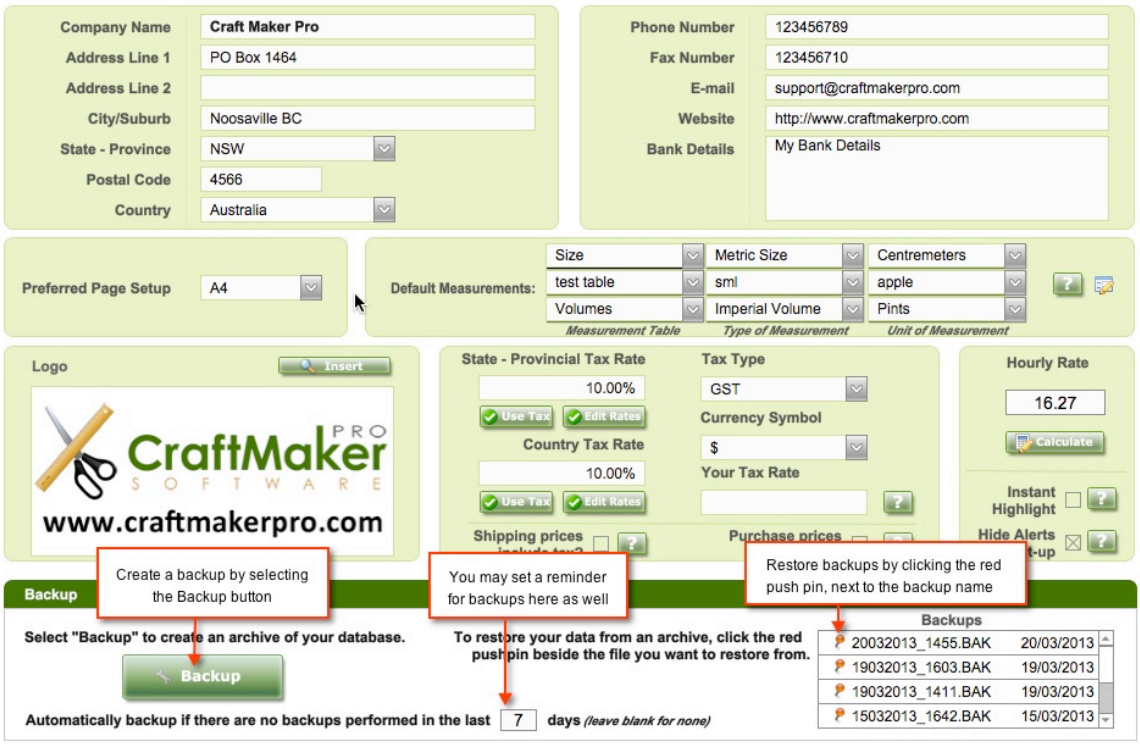
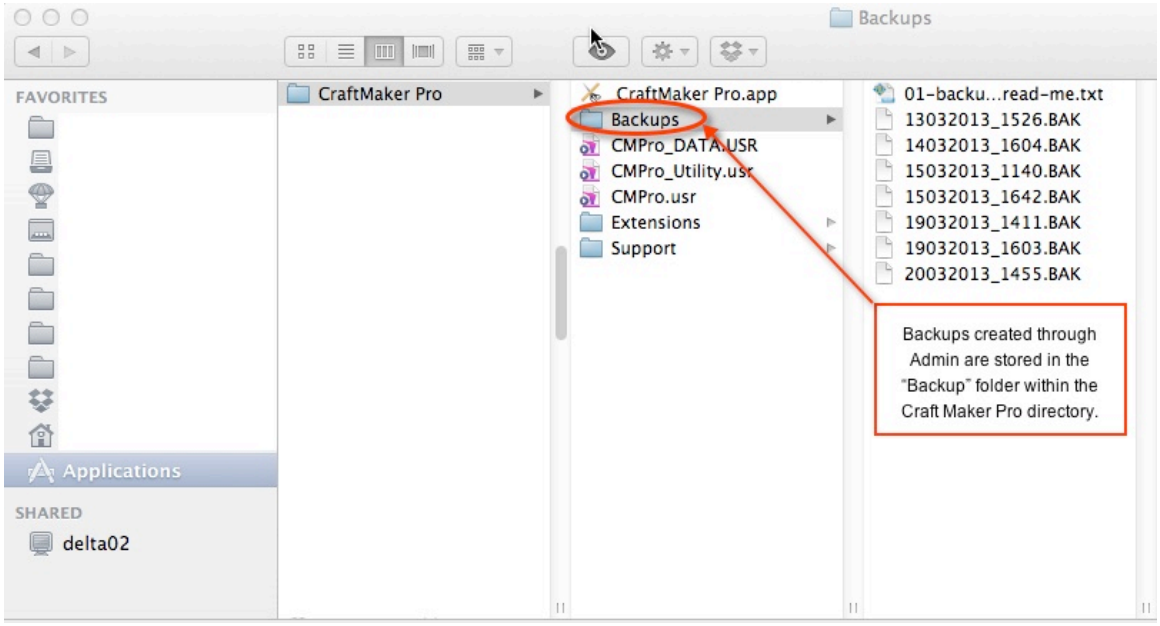


**Fig 58:** **Backup Data – File Location**

Screen shot below is for Mac. Install path is in **Applications** by default.

Windows is exactly the same but install path is in **C://CraftMakerPro/** by default.



## • *Saving Your Backups Externally*

We would highly recommend that you setup an automated way to save your backups to an external drive so that in the event of a computer failure or loss your data will be safe.

We would recommend that you use the following systems, **which are all free at the time of writing this**, to do this and once setup every time you create a backup it will automatically be synched to a remote server for safekeeping.

Please note we do not have any direct association with the services listed below. We recommend using them, as it's a great way to save your data but use of these services is all in accordance with their guidelines and we do not offer tech support for them.

- **Setup a Dropbox Account:**

The first thing you will need is an account with Dropbox. This works for PC and Mac so your all covered here ☺

Just go to Dropbox, setup your account and install the software to get started with 2GB of Free storage. http://www.craftmakerpro.com/dropbox

- **Dropbox Folder Sync - For Windows Users:**

Dropbox Folder Sync is a simple app for Dropbox that allows you to seamlessly sync folders outside the Dropbox folder. Sync and Unsync to Dropbox just by using the right click menu on the folder.

Usage:

1. Run the Installer
2. To sync' a folder with Dropbox, right click it and click "Sync with Dropbox".
3. Sync your Backup Folder as well as your Image_Repository folder to ensure that all data is saved.

Download your copy of Dropbox Folder Sync and get further instructions and details from here: http://www.craftmakerpro.com/dropbox-folder-sync

- **MacDropAny - For Mac Users:**

MacDropAny is quick and easy to use. There are three ways you can sync folders outside of Dropbox:

Usage:

1. Launch MacDropAny and navigate to your Backup Folder inside Craft Maker Pro in your Applications folder.
2. Drag your Backup Folder folder onto MacDropAny's icon in Finder, the dock, or anywhere else.
3. Or; in Finder, right click on your Backup Folder and select "Sync with Dropbox (via MacDropAny)"

Download your copy of MacDropAny and get further instructions and details from here: http://www.craftmakerpro.com/macdropany

## Additional Support and Assistance

For additional instant support and assistance please check our online help and video tutorials.

If you require further help and technical support please contact us through our support ticket system.

All support and technical help is run through our support ticket system to enable us to correctly track and respond appropriately to any request for support.

Please note if you send email requests for support or asking for assistance they may not receive a reply, so please ensure you use the ticket system.

Thank you very much and we hope that you enjoy using Craft Maker Pro.

Regards



Gary Capps

General Manager

CraftMakerPro.com

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