CHAPTER 10

Using FrameMate

In this chapter:

• Opening FrameMate, 313
• Using the FRAMES SPEX UPC CD-ROM, 314
• Using the FRAMES Quarterly CD-ROM, 316
• Using the Marchon Diskette, CD-ROM, & Download Sources, 317
• Transferring & Loading Frames into the OfficeMate Products Database, 320
• Viewing Frame Information, 323
• Deleting Manufacturers, 324

FrameMate allows you to use the electronic catalogs available from the FRAMES Data SPEX UPC CD-ROM, FRAMES Data Quarterly CD-ROM, and Marchon Frames Diskette. Use FrameMate to view information about a product and transfer the information into OfficeMate.

Note: Before you transfer frames into OfficeMate, set up your procedure codes. For more information on setting up procedure codes, go to To add procedure codes on page 45.

Opening FrameMate

Open the FrameMate using one of the following methods:

• Click the Products icon and select FrameMate.
• Click Tasks on the main window toolbar and select FrameMate.
This section tells you how to use the monthly FRAMES SPEX UPC CD-ROM with FrameMate and OfficeMate, including how:

• To open the FRAMES SPEX UPC CD-ROM in FrameMate, 314
• To import manufacturers into FrameMate, 315

Note
If you are looking for information on using the FRAMES Quarterly CD-ROM, go to Using the FRAMES Quarterly CD-ROM on page 316.

To open the FRAMES SPEX UPC CD-ROM in FrameMate

1. Open FrameMate. For more information on opening FrameMate, go to Opening FrameMate on page 313.
2. Click Tasks and select Select FRAMES Source.
   The Catalog FRAMES Source window opens.
3. Insert the FRAMES SPEX UPC CD-ROM into your CD-ROM drive.
4. Select your CD-ROM drive from the Drive drop-down menu.
5. Click the FRAMES UPC Data CD radio button.
6. Click OK.
7. Import manufacturers into FrameMate. For information on importing manufacturers, go to To import manufacturers into FrameMate on page 315.
## To import manufacturers into FrameMate

<table>
<thead>
<tr>
<th>Note</th>
<th>You must install manufacturers <em>every time</em> you receive and install a new Frames SPEX UPC CD. If you do not install manufacturers every time you install a new Frames SPEX UPC CD, you will not see updated manufacturer information in FrameMate and OfficeMate.</th>
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</table>

1. Open the FRAMES SPEX UPC CD-ROM. For information on opening the SPEX UPC CD-ROM in FrameMate, go to To open the FRAMES SPEX UPC CD-ROM in FrameMate on page 314.

2. Click **Tasks** and select **Install Catalog**.

   The **Catalog Installation & Update** window opens.

3. Select your CD-ROM drive from the **Install From** drop-down menu.

4. Select **Frames Data SPEX UPC CD** from the Available Catalogs box.

5. Click **Install Manufacturers**.

   ![Catalog Installation & Update](image)

6. Click on the manufacturers that you want to install.

   **Notes**
   - Click **Select All** to select all of the manufacturers listed.
   - Click **Unselect All** to unselect all of the manufacturers that you previously selected.
7 Click **Install**.

![Installation dialog box](image)

8 Click **Yes** on the Installation Warning window.

The installation begins.

9 Click **OK** on the Installation Completed window.

10 Transfer product data from the FRAMES SPEX UPC CD-ROM into OfficeMate. For information about transferring product data, go to *Transferring & Loading Frames into the OfficeMate Products Database on page 320*. 

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**Using the FRAMES Quarterly CD-ROM**

This section tells you how to use the FRAMES Quarterly CD-ROM with FrameMate and OfficeMate, including how

- **To open the FRAMES Quarterly CD-ROM in FrameMate, 316**

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<thead>
<tr>
<th>Notes</th>
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<tbody>
<tr>
<td>• If you are looking for information on using the monthly FRAMES SPEX UPC CD-ROM, go to <em>Using the FRAMES SPEX UPC CD-ROM on page 314</em>.</td>
<td></td>
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<tr>
<td>• Unlike the monthly FRAMES SPEX UPC CD-ROM, you are not required to import manufacturers into FrameMate before transferring frames into OfficeMate.</td>
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</table>

**To open the FRAMES Quarterly CD-ROM in FrameMate**

1 Open FrameMate. For more information on opening FrameMate, go to *Opening FrameMate on page 313*.

2 Click **Tasks** and select **Select FRAMES Source**.

The **Catalog FRAMES Source** window opens.

3 Insert the FRAMES Quarterly CD-ROM into your CD-ROM drive.

4 Select your CD-ROM drive from the **Drive** drop-down menu.
5 Click the **FRAMES Quarterly CD** radio button.

6 Click **OK**.

7 Transfer product data from the FRAMES Quarterly CD-ROM into OfficeMate. For information about transferring product data, go to Transferring & Loading Frames into the OfficeMate Products Database on page 320.

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### Using the Marchon Diskette, CD-ROM, & Download Sources

This section tells you how to use the monthly FRAMES SPEX UPC CD-ROM with FrameMate and OfficeMate, including how

- To open the FRAMES SPEX UPC CD-ROM in FrameMate, 314
- To import manufacturers into FrameMate, 315

| Note | If you are using OfficeMate 7.0 or above and you downloaded frames from the Marchon MVP Web site after June 2006, you must use a CD-ROM to transfer the frames into FrameMate. If you downloaded frames from the Marchon MVP Web site before June 2006, you can transfer the frames into FrameMate using a diskette. |

#### To open the Marchon Diskette & CD-ROM in FrameMate

1 Open FrameMate. For more information on opening FrameMate, go to Opening FrameMate on page 313.

2 Click **Tasks** and select **Select FRAMES Source**.

   The **Catalog FRAMES Source** window opens.
3 Complete one of the following tasks:
   − Insert the Marchon Frames diskette into your floppy disk drive.
   − Insert the Marchon Frames CD-ROM into your CD-ROM drive.
   − If you are installing Marchon frames that you have already downloaded to
     your computer from the Marchon MVP Web site, skip this step and go to
     step 4.

4 Select your floppy disk drive, CD-ROM drive, or the drive where you saved your
   previously downloaded Marchon frames from the **Drive** drop-down menu.

5 Select the **Diskette**, **Data CD**, or **Download File** radio button.

6 Click **OK**.

7 Import manufacturers into FrameMate. For information on importing
   manufacturers, go to **To import manufacturers into FrameMate on page 319**.

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**Note** To request a Marchon Frames diskette or CD-ROM, call Marchon
   Eyewear at 1.800.645.1300 and ask for the Excess Sales
   Department or e-mail them at excesssales@marchon.com. You
   can also go to the Marchon MVP Web site at
   download the Marchon frames, and copy them onto a floppy disk
   or CD-ROM or save them on to your computer.

**Note** If you selected the Download File radio button, navigate to the
   location where you saved your downloaded Marchon frames.
To import manufacturers into FrameMate

1. Open the Marchon Diskette, CD-ROM, or Downloaded Source. For information, go to To open the Marchon Diskette & CD-ROM in FrameMate on page 317.

2. Click Tasks and select Install Catalog.

   The Catalog Installation & Update window opens.

3. Select your floppy disk drive from the Install From drop-down menu.

4. Select Marchon UPC from the Available Catalogs box.

5. Click on the manufacturers that you want to install.

6. Click Install.

7. Click Yes on the Installation Warning window.

   The installation begins.

8. Click OK on the Installation Completed window.

9. Transfer product data from the Marchon Catalog into OfficeMate. For information about transferring product data, go to Transferring & Loading Frames into the OfficeMate Products Database on page 320.

Note: You must install manufacturers every time you receive and install a new Marchon diskette or CD. If you do not install manufacturers every time you install a new Marchon Diskette or CD, you will not see updated manufacturer information in FrameMate and OfficeMate.

Notes:
- Click Select All to select all of the manufacturers listed.
- Click Unselect All to unselect all of the manufacturers that you previously selected.
Transferring & Loading Frames into the OfficeMate Products Database

1. Open FrameMate. For more information on opening FrameMate, go to Opening FrameMate on page 313.
2. Click Tasks and select Transfer Into OfficeMate.
   The Transfer to OfficeMate window opens.
3. Select a manufacturer from the Manufacturer drop-down menu.
4. Select a designer from the Designer drop-down menu, if desired.
5. Select a Frame Criteria radio button.
6. Select the Detail check box if you want to include eye sizes, colors, and product codes in the transfer.

7. Click Calculate Fee.
   The Fee Calculation Specifications window opens.
8. Type the markup in the Factor text box.
9. Type additional markup dollars in the Dollars text box.
10. Select the Round Up or Down check box.
11. Type the value in the Cents text box with which you want the price to end.

12. Click OK.
13 Click Cross-reference.

The Cross-Reference Catalog & OfficeMate Data window opens if an exact match for the manufacturer selected for transfer cannot be found in the OfficeMate database.

14 Click Add and then select a manufacturer from the OfficeMate Data drop-down menu, if applicable.

15 Click Add and then select designers from the Designer drop-down menus, if applicable.

Notes

- Use the Cross Reference Catalog & OfficeMate Data window to create new manufacturers in the OfficeMate database, select an existing manufacturer that corresponds to the one you are importing from the FRAMES Data catalog, and assign OfficeMate-specific details to the products you are importing.
- The information that appears under the Catalog Data heading lists the manufacturer and designer(s) you are importing from the FRAMES Data Catalog.
- The information that appears under the OfficeMate Data heading lists the manufacturers, designers, and OfficeMate-specific details from your OfficeMate products database. Use the Add buttons to add new manufacturers or designers.
Select the tax type, insurance fee type, vendor, stocking type, unit of measure, CPT code, financial group (if necessary), and production group (if necessary) from the appropriate drop-down menu.

Click OK.

Click Load.

Select or deselect frames by clicking Select All, Unselect All, or individually selecting and deselecting Sel check boxes.

Type fees in the Fee text boxes, if applicable.

Ensure that the OfficeMate Products window is closed.

Click Transfer.

Click Yes on the Transfer Warning window.

Click OK when the transfer is complete.

Repeat these steps 3–24 for each manufacturer and designer that you want to transfer into your OfficeMate Products database.
Viewing Frame Information

1. Click View.
2. Select a manufacturer from the Manufacturer drop-down menu.
3. Select a brand name or designer from the Brand Name/Designer drop-down menu.
4. Select one of the Frame Criteria radio buttons.
5. Click Load.
6. Double-click on a frame.

OR

Select a frame and click View Details.

Note: FRAMES Quarterly CD-ROM frame styles with an asterisk include an image. Click on the frame image box to view the image.

The Frame Style View window opens.
7 View the frame details using one or more of the following methods:
   − Click List SKUs to view the stock keeping unit numbers.
   − Click Price to open the Price Information window and view price information.
   − Click Summary to view summary details.
   − Click the arrow buttons to view information on other frames.

8 Click Close to close the Frame Style View window.

9 Click Close to close the View Catalog window.

► Deleting Manufacturers

| Note | You can only delete manufacturers from the FRAMES SPEX UPC CD-ROM and the Marchon Diskette. You cannot delete manufacturers from the FRAMES Quarterly CD-ROM. |

1 Click Tasks and select Delete Manufacturers.

The Delete Manufacturers window opens.

2 Select a catalog from the Available Catalogs box.
3 Select or deselect manufacturers by clicking Select All, Unselect All, or individually selecting and deselecting manufacturers.

4 Click Delete.

5 Click OK on the Deletion Completed window.