

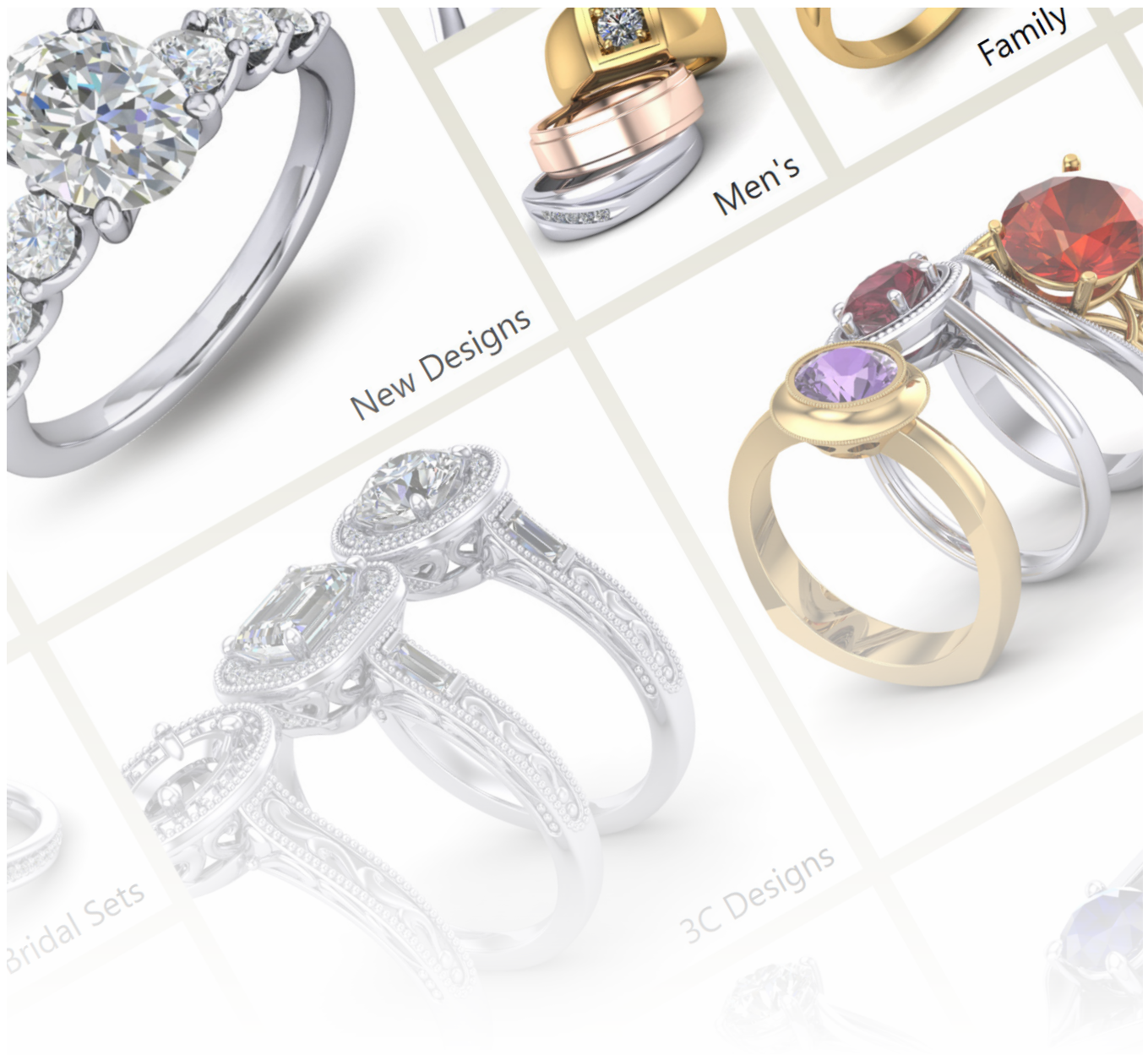


USER GUIDE



TABLE CONTENTS

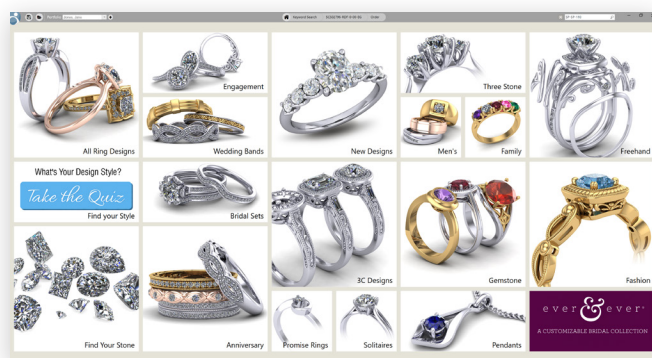
CHAPTER 1: Search	4
CHAPTER 2: Customize	13
CHAPTER 3: Freehand Mode (available only in Studio version)	23
CHAPTER 4: Appearance	33
CHAPTER 5: Account Info & Preferences	39
CHAPTER 6: Order	45
CHAPTER 7: Deliver	50
CHAPTER 8: Help & Resources	54



CHAPTER 1

Search

INTERACTING WITH SEARCH



Upon opening CounterSketch, the Start Screen offers you and your customer many inventory categories to choose from. Choose a tile to get started.

Qualifying Your Customer

Qualify is a term we will use to define the process that takes place when guiding your customer down the most efficient path toward the custom jewelry design of their dreams.

CounterSketch may be the most powerful tool in your arsenal for selling custom jewelry. If you do not understand how to use it effectively, it is possible you may use CounterSketch all day long and never make a sale. CounterSketch was created to help lead customers to jewelers and provide a new, exciting, and more cost efficient way of creating custom designs. CounterSketch and your customer have one thing in common: they both need YOU. Both require a skilled individual with knowledge about jewelry and selling jewelry in order to help conceptualize and manifest a beautiful design.

It is important to qualify the customer first. The first step is to determine whether custom design is the right option for your clients. Can they spare the extra time that the manufacturing of custom jewelry requires, and do they find added value in creating something unique to their own lifestyle and aesthetic? If custom is the right choice, CounterSketch will offer an exciting shopping experience.

However, before sitting down in front of CounterSketch, further qualify your customer. The more information you know prior to launching CounterSketch, the better (and faster!) the experience is for everyone involved. By qualifying, you avoid going down a rabbit hole in search of the perfect item.

SELLING TIP

Remove any inhibitions your customer may have about being in a jewelry store, and their preconceived notions of a high pressure sales experience by teaching them how to mark a design with a green check mark, allowing them time to browse the library independently, and return to visit with them after a few minutes. Then use the Compare tool to begin the design consultation.

When you ask a customer, "What is your style," many times she cannot find words to describe her taste. After providing her with the tools and a few minutes to browse, it may become clear she actually has a very clear idea of her design aesthetic — maybe just a more visual idea than a verbal one.

You want to keep your client from feeling overwhelmed with all of the choices available to them, and needing to think about it a bit more, and leaving, never to return. The number of models, as well as the multitude of options available for each model within CounterSketch, can make one feel that way when diving in without any sense of direction or a destination in mind.

The best sales people do not try to push a sale. On the contrary, they ask lots of questions, extracting valuable information, so they can help assist in making an informed decision. In turn, they build a strong relationship with the client during the process.

The key to pulling information from clients is asking lots of open-ended questions, and listening to those answers. What type of jewelry are they shopping for? Is it an anniversary present or an engagement ring? Do they like yellow or white metal? Do they like modern items or more traditional designs?

Take note of the jewelry items they are wearing and ask what they like or dislike about those items. It is also highly likely that there is a budget to take into consideration. You may choose to use items from your store's showcase or from the CounterSketch Prototype Selling System to assist in qualifying your customer. Or, you may choose to use the images within CounterSketch in conjunction with live merchandise to help qualify.

Information about your clients' likes and dislikes is as valuable as gold. If you extract important information

about your client, by all means, write it down and file it. Find a system that works for you and your work environment. This information not only helps with the current sale, but can also assist with any future sales. The information you can recall about a client's aesthetic a year from now (or five years from now) can go a long way towards building a lasting relationship that will keep them coming back to your store for generations to come.

So let's get started.

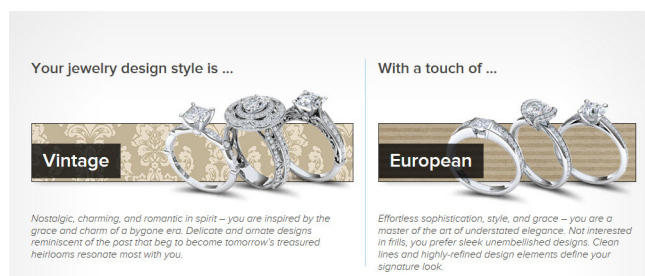
The Style Quiz

What defines your personal sense of style? Is it hard to put into words? The CounterSketch Style Quiz, located on the Start Screen, can help you get started.

Click on What's Your Design Style tile to prompt a short visual quiz. Begin by asking your customer to read the instructions. These tell them to choose one image from a group they are most attracted to. For example, which house would they most like to live in? Which pair of shoes would most likely be found in her closet (or his girlfriend's closet)? The results are most accurate when a customer goes with her gut feeling and does not spend too much time worrying about what the results may say about her, or which image is the best. If your customer is shopping for someone else, instruct him to pick things he thinks the recipient would like. Click Take the Quiz to begin.

After making the selection of images, the quiz will return the results. These offer a primary and secondary jewelry design style and recommend items that fit this aesthetic. The style categories are Art Deco, Art Nouveau, Classic, Contemporary, European Chic, Glamorous, Modern, and Vintage. These styles are associated with the style filter located along the left side of the Search interface. To view the jewelry recommended, follow the instructions by choosing Browse these Styles. Choose Retake to start the quiz from the beginning. At any time, you can exit the quiz by choosing Close in the top-right corner.

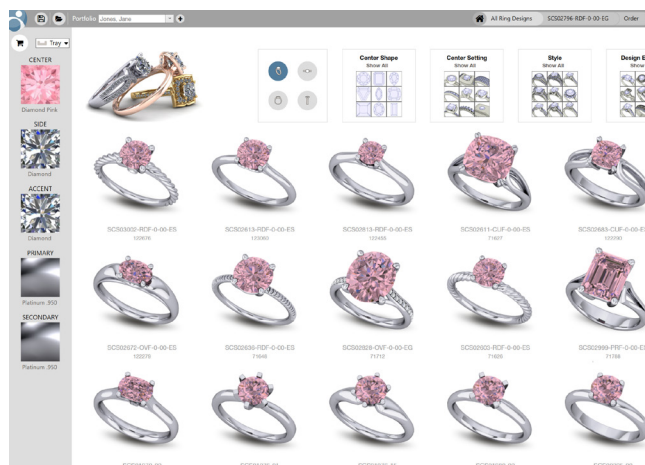
USER TIP



Use the Style Quiz as an ice breaker. Ask your customer whether the results accurately define her personal sense of style, and use this information as a fun and interactive way to begin the design consultation.

PERFORM A SEARCH

Designed to have the familiar look and feel of a website storefront, Search is where you and your customer together (or your customer independently after a quick lesson from you) will begin the customization process. Notice that when hovering the mouse over the categories, a short description of each category is revealed. This gives your customer a bit more information to help him with his decision-making process. Select an option, such as Engagement or Solitaires, and the program will



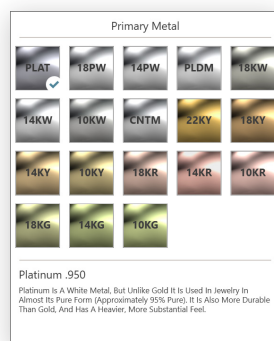
return the results and images of all related items in the next screen called the Showcase.

Use the scroll bar to the right of the Showcase to browse the designs. Many searches will result in more than one page of items. If so, click on the page numbers also found along the top-right-hand side. The slider located at the top-left corner of the Showcase adjusts the size of the resulting images.

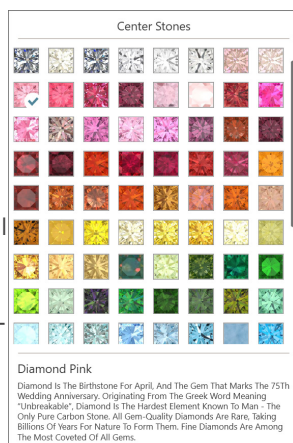
At any point during the design consultation, return to the Start Screen to begin a new search by clicking the home icon at the top of the screen

Refine Your Search

Immediately amaze your customer and make the resulting items appear instantly in whatever metal and gemstone color combination she wishes to see. Select the desired filters under the Materials column along the left side of the interface. Select the primary and secondary metal, center stone, side stone, and accent stones. The Showcase instantly reflects the updates with the new filters applied, including metal and gemstone color.



When choosing materials for gemstones, and choose the gem material. Hover your mouse over each tile to see a description of the gemstone options. After selecting a material from the menu, it will automatically close and the gemstones will be updated immediately within the Showcase to reflect this change.



In CounterSketch, you can further refine your search by picking particular center stone diamonds from Stuller's Red Box Diamonds® inventory. To specify stone options from this inventory, click on the shopping cart button in the above the center stone at the top of the screen.



This will direct you to the Find Your Stone pane, where you can research and save particular stones using the Stone Tray. Once you have saved stones, access the Stone Tray by clicking the Tray button, which can be found just below the center stones box in the search

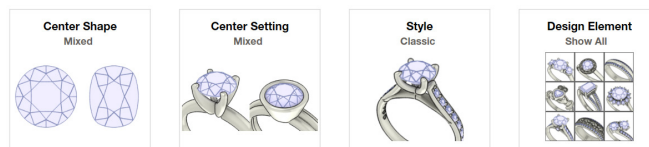
menu. Specify a particular stone by clicking assign within the Stone Tray.

SHAPE	CARAT	CUT	COLOR	CLARITY	PRICE	Assign
Round	2.49	Excellent	J	SI1	\$29,652.79	Assign X
Round	2.31	Excellent	J	SI1	\$24,901.80	Assign X
Round	2.50	Ideal	H	SI2	\$22,859.38	Assign X
Round	2.34	Very Good	G	SI2	\$20,655.18	Assign X

NOTE: When you assign a stone, you are picking a specific stone with a specific size. If you modify the size of the stone while customizing your piece, the stone will be unassigned. In other words, you cannot modify the size of an assigned stone.

For more detailed instruction on searching by stone, see the Find Your Stone section at the end of this chapter.

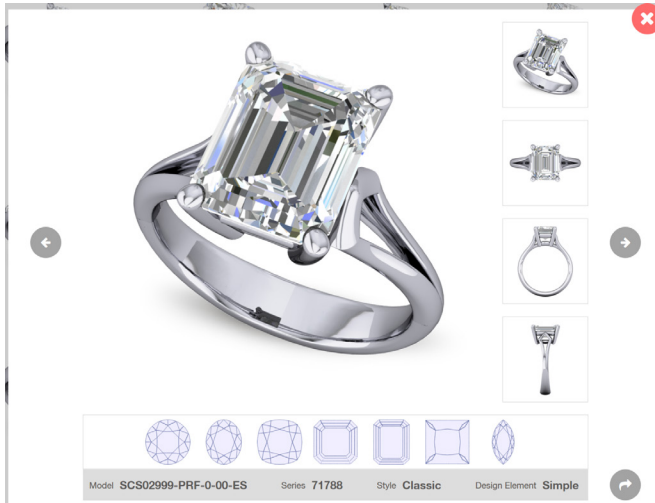
Continue to filter the results using the Narrow Search column. Choose the center gem size, center shape, center setting, side shape, side setting, style, and any design elements your client may desire.



If the customer has a very clear idea of what she is looking for from the beginning, you may also use the Search for Products field located at the top right-hand corner of the interface to hone down the search to one or more words relevant to your customer's dream item. Technically, the Search for Products field recognizes the words in the fields of Stone Shape, Stone Setting, and Style. Ex: You can type in halo-style, heart, bezel, teens, channel, its Model number, if known, — even filter results further by typing in teen heart. Click the X located to the left of the Search for Products to remove the keyword filter.

Design Details

At this point, your customer will probably want to see some of the options up close and personal to help them with the decision-making process. Click on any library image to select it. When selected, the design details will appear in a window with a large thumbnail image of the piece. Four smaller thumbnails will display alternate views of the model as well. Click on any of the four images, and this view will replace the larger image.



Gem Shapes

Below the design, you will also see all of the gem shapes that are available for this model. Additional details about the design are located below the similar styles.

- Model Number: Unique number used to name the design
- Series: A number used to locate a design in Stuller's catalog
- Design Element/Keyword associated with this model

SAVING SEARCH RESULTS

During the initial steps of the design consultation, identify designs your customer is drawn to by clicking on the small square in the lower left-corner of the image associated with the item. This action will mark a small check next to the design. After marking an item, the Add Marked Designs to Portfolio button will appear at the top of the Showcase.

USER TIP

If you double-click a design in the Showcase, the view will change to the Customize screen, and the item will appear full-screen. This changes your active mode to Customize, as shown in the upper left corner of the interface. Click on the Showcase name at the top of the screen to return to the Showcase.

The marked items can be saved by entering a name into the portfolio text box. Hover your mouse, and double-click on the Portfolio text box. Then enter a name into the text field. The designs will be saved under this name within the design manager.



Portfolio and Design Manager are explained in detail in the Customize chapter.

You have the option of teaching your customer how to browse the Showcase independently and identify designs of interest, marking them with a check as they go. This process creates a starting point for the design consultation and allows them a pressure-free way to browse your jewelry.

USER TIP

Create a naming convention, and stick to it. Standardizing this means that if a customer needs to come back at a later time, anyone can quickly locate the customer's designs. We recommend using the customer's last name followed by their first name.

Adding Design to Portfolio

After identifying the items your client likes, use the Add Marked Designs to Portfolio button. The button becomes visible only after marking an item with a check-mark. Clicking this button will add all marked designs to the active Portfolio. This filtering process allows you to eliminate designs and is an important step in the design consultation. By removing unnecessary designs you can see at a glance the style of item your client desires.

 + Add Marked Designs to Portfolio

USER TIP

Although there is no limit to the amount of designs that can be marked, we recommend filtering down to 3-5, if possible, so as not to overwhelm the customer with the multitude of options available for each design during the Customize phase of the session.

Selling With Prototype Kits

Stuller's high-quality prototypes are a rhodium-plated alloy set with cubic zirconia. This valuable resource helps your customer visualize and make the translation from a computer monitor to a live piece of jewelry.

Prototypes and jewelry from your store's inventory can be used in conjunction with CounterSketch to qualify your customer. After using the qualifying the

and assessing your customer's aesthetic, gather live jewelry items from your store's showcases to help them with their design decisions. Pick things that are similar to their choices within CounterSketch.

Prototypes can help determine things like setting styles for side gems, prong layout, gem shape, and more. This process will help you identify which one of the CounterSketch models best suits their needs and help to eliminate the designs that do not. Keep in mind, if by using prototypes and live merchandise your client finds the perfect item from within your store's inventory, by all means, close the sale. There are many ways to harness the power of CounterSketch within your store. If, after identifying what is important to your client, and finding something close to what they are looking for, continue to the Customize chapter and learn how to personalize a design especially for them.

All Prototype Kits Include —

- Displays loaded with tagged product
- Access to Stuller Showcase for retail pricing
- Follow ups from prototype specialists
- Financing options for eligible clients

Contact Stuller's prototype specialists at 1.800.877.777, ext. 414, for more information.

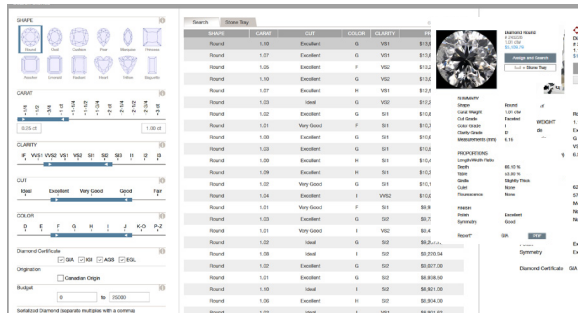
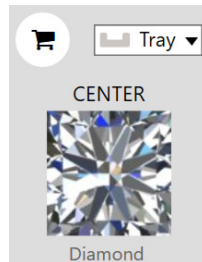


Find Your Stone

CounterSketch allows you to search by diamond center stone, instead of only by design prototype. Furthermore, this search works with Stuller's popular Red Box Diamonds®.

Red Box Diamonds provide a range of benefits, including —

- A grading report from an independent lab or our team of GIA® and AGS®-trained experts
- A laser-inscribed identification number linking the diamond to its unique grading report
- Graduated rebates based on purchase quantities



You may find your stone in one of three ways —

- By clicking on the Find Your Stone tile on the Start Screen.
- By accessing the Shop button above the center stone in the Search tab.
- By clicking on the Shop button on the Order Screen.

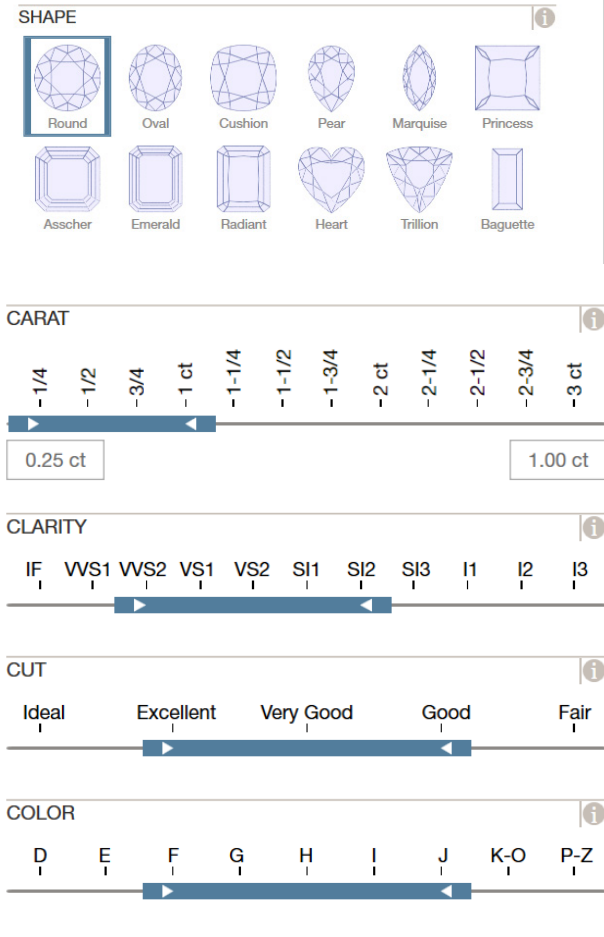
Refine Your Stone Search

On the left side of the Find Your Stone window, begin by narrowing your search according to these categories: Shape, Carat, Clarity, Cut, Color, Diamond Grading Report, and Budget.

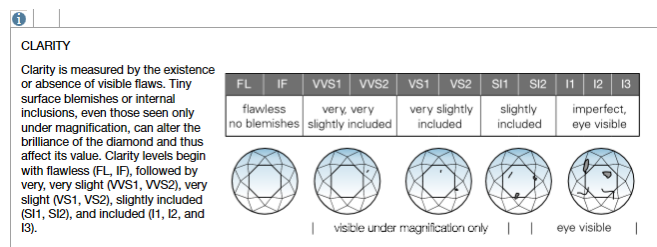
Shape: To select a shape or shapes, click on the desired shape icon(s). To remove a shape from your search, click the selected icon a second time.

The Four Cs: Carat, Clarity, Cut, and Color To specify search ranges according to the Four Cs, adjust the gray sliders. In order to adjust slider lengths, click and drag the arrows to the desired position. To adjust the

slider position, click in the middle of the slider and move either left or right.



For more detailed information about each parameter, click the small information icon at the right of the slider window.





Diamond Grading Report: To specify a desired diamond grading report, check or uncheck boxes for the following:

- GIA® (Gemological Institute of America®)
- AGS® (American Gem Society®)
- IGI (International Gemological Institute)
- Canadian Origin (Certified by the Canadian Diamond Code of Conduct)

Budget: Specify your minimum and maximum budget by entering dollar amounts in the rectangular boxes.

Search: To start this process over, click Reset. To conduct a search based on your chosen characteristics, click Search. If your search returns insufficient results expand your search parameters based on what is important to your customer.

Working With Stone Search Results

Based on your search criteria, a list of relevant stones will appear in the middle pane of the Find Your Stone window. This window contains a basic list of characteristics for each stone, including Shape, Carat, Cut, Color, Clarity, and Price. For more detailed information about a particular stone, click anywhere in the list of stones. When a chosen stone is selected, the bar turns blue,

and an arrow points to the right pane of the Find Your Stone window.

Based on your selection, this pane populates with the stone's Red Box Diamond report, which includes —

- A photograph of the selected stone
- Proportions
- Finish information

Search	Stone Tray	4 Stones in Tray				
shape	carat	cut	color	clarity	price	
Round	1.00	Very Good	F	S11	\$19,665.00	➔
Round	1.00	Excellent	G	S11	\$16,845.00	×
Round	1.00	Good	G	S11	\$15,120.00	×
Round	1.00	Excellent	F	S11	\$17,790.00	×

Further information about the stone's grading, including a link to its online diamond grading report, is accessible by clicking PDF near the bottom right portion of the grading report pane.

The Stone Tray And Search Mountings

When you find a stone you like, save it to use later by adding it to the Stone Tray. To add a diamond to the tray, either click the +Stone Tray button or the Search Mountings button, both located on the right side of the stone's photograph.

Click +Stone Tray to remain in the Find Your Stone window, and continue searching by stone. To review your saved stones, click on the Stone Tray tab in the center pane of the Find Your Stone window.

Click the Assign and Search button to add your stone to the Stone Tray and to go directly to a list of design options that are available and filtered according to your chosen diamond.

Search	Stone Tray	1000 results of 1000				
shape	carat	cut	color	clarity	price	
Round	1.00	Very Good	F	S11	\$19,665.00	
Round	1.00	Excellent	G	S11	\$16,845.00	
Round	1.00	Excellent	F	S11	\$17,790.00	
Round	1.00	Excellent	F	S11	\$17,790.00	
Round	1.00	Excellent	F	S11	\$17,790.00	
Round	1.00	Very Good	G	S11	\$17,205.00	
Round	1.00	Very Good	G	S11	\$17,205.00	
Round	1.00	Very Good	G	VS2	\$17,070.00	
Round	1.00	Excellent	G	S11	\$16,845.00	
Round	1.00	Very Good	F	S11	\$16,410.00	
Round	1.00	Good	G	S11	\$15,960.00	
Round	1.00	Excellent	G	S2	\$15,840.00	
Round	1.00	Good	G	S11	\$15,720.00	
Round	1.00	Excellent	G	S2	\$15,100.00	
Round	1.00	Good	G	S11	\$15,120.00	
Round	1.00	Good	G	S11	\$15,075.00	
Round	1.00	Good	H	S11	\$15,000.00	
Round	1.00	Good	H	S11	\$14,805.00	
Round	1.00	Excellent	H	S2	\$14,745.00	
Round	1.00	Very Good	I	VS2	\$14,490.00	
Round	1.00	Good	I	S11	\$14,415.00	
Round	1.00	Very Good	G	S2	\$14,265.00	
Round	0.90	Excellent	G	VS2	\$14,220.00	
Round	1.00	Very Good	F	S2	\$14,175.00	
Round	1.00	Very Good	I	S11	\$14,055.00	
Round	1.00	Very Good	H	S11	\$14,040.00	
Round	1.00	Very Good	I	S11	\$14,040.00	
Round	1.00	Excellent	H	S2	\$14,040.00	

Diamond Round
244078
0.79 ctw
\$7,504.21

Assign and Search

+ Stone Tray

NO DUPLICATION

Shape: Round
Carat Weight: 1.01 ctw
Cut Grade: Excellent
Color Grade: I
Clarity Grade: SI
Measurements (mm): 6.15

PROPORTIONS

Length/Width Ratio: 85.10 %
Depth: 63.90 %
Table: Slightly Thick
Girdle: None
Culet: None
Fluorescence: None

FINISH

Polish: Excellent
Symmetry: Good

Reset Cancel

**Disclaimer & Limitation of Liability: Red Box Diamonds Laboratory Grading Reports. View Disclaimer

In the event that the diamond you have selected to buy becomes unavailable, we will attempt to substitute the diamond with one that is most similar to the quality of the originally selected stone. In the event that the diamond you have selected to buy is not available, we will attempt to substitute a different diamond and replace your order. We apologize for any inconvenience this may cause.

When you have added stones to the Stone Tray by clicking either the +Stone Tray tab or the Search Mountings tab, you will be able to access these saved stones, while refining your design choices in Search or during the order process, from the Stone Tray drop down.

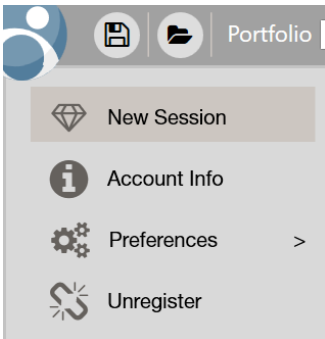


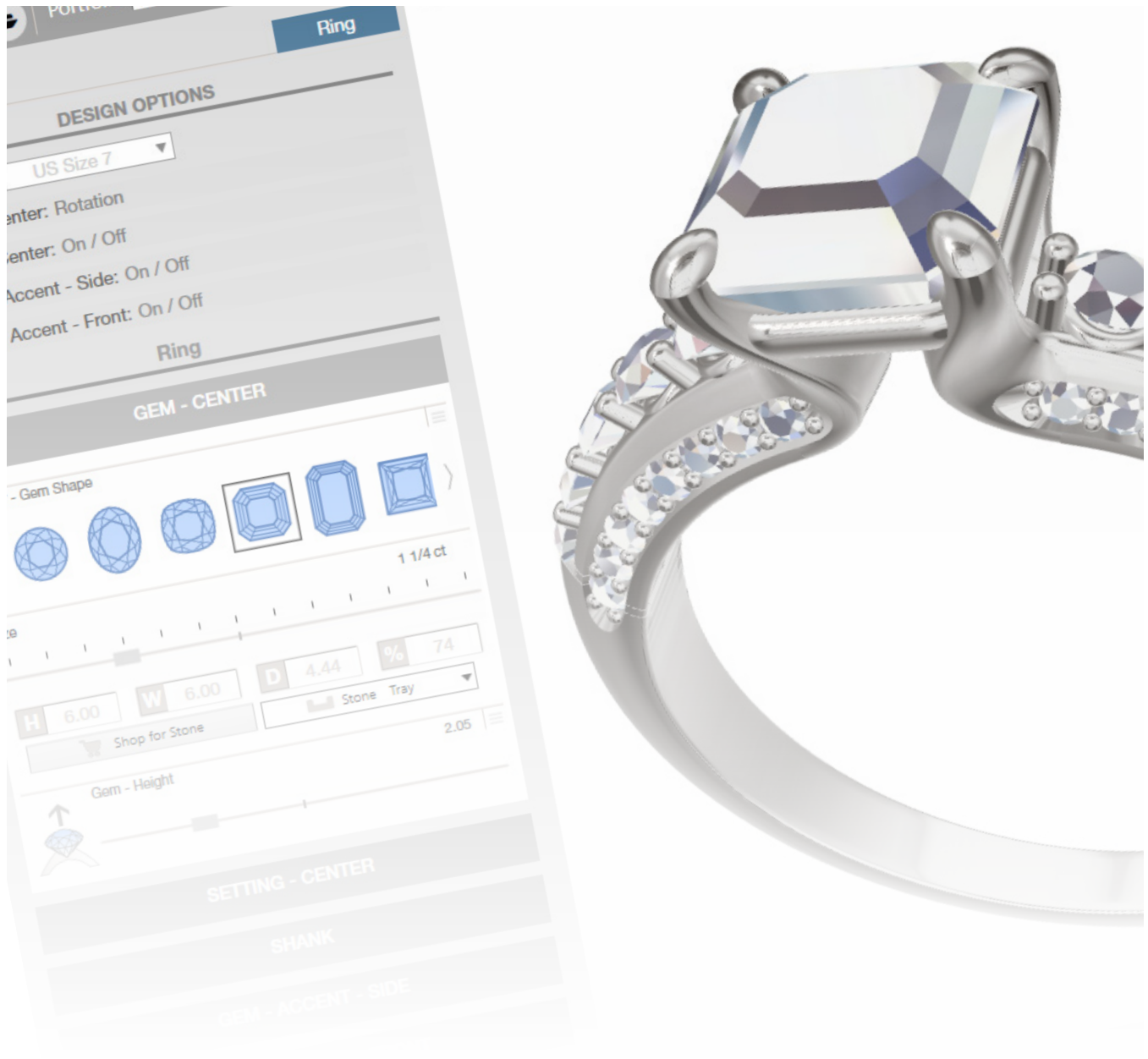
The screenshot shows a dropdown menu titled 'Tray' containing a table of saved stones. The table has columns for SHAPE, CARAT, CUT, COLOR CLARITY, and PRICE. Each row also includes an 'Assign' button and a close 'x' icon.

SHAPE	CARAT	CUT	COLOR CLARITY	PRICE	Assign	x
Round	1.10	Excellent	G VS1	\$13,906.20	Assign	x
Round	1.07	Excellent	G VS1	\$13,850.08	Assign	x
Round	1.05	Excellent	F VS2	\$13,230.00	Assign	x
Round	1.10	Excellent	G VS2	\$13,081.20	Assign	x
Round	1.07	Excellent	H VS1	\$12,519.00	Assign	x

New Session

If you would like a clean slate with which to begin a new design consultation, locate New Session under the CounterSketch menu (The CounterSketch icon in the top left corner of the interface). You will be prompted to save the Portfolio. Answer Yes and give it a name, or choose No to completely reset the program without saving. The CounterSketch interface will reset as if the program had just been opened, clearing any search criteria from the Show-case and loading a new, empty Portfolio. New Session is useful if you have finished working with a client and want to prepare for your next design consultation.





CHAPTER 2

Customize



CREATING A RETAIL EXPERIENCE

If you were newly engaged and out to dinner with family and friends, which story would you rather tell? Story #1: "I went into a jewelry store and chose a ring out of their showcase," Story #2: "I visited my jeweler, and I custom-designed a one-of-a-kind ring for my fiancée" If you chose Story #2, you agree with 100% of the people we surveyed (Feel free to use this line to help close the sale).

CREATE A CUSTOM DESIGN

In this chapter of the CounterSketch User Guide, learn the details of how to customize a design to meet the needs of your client. It should be mentioned that CounterSketch was designed to be used with your customers. Engaging and exciting them during this crucial phase of the design consultation will go a long way towards closing the sale.

Involving your client in the search and customization process gives them a feeling of ownership over the creation of the design. When the customer plays this key role in the creation of the jewelry item, there will be a sense of commitment that goes beyond simply choosing a ring from the showcase. You are giving your client a retail experience that will add emotional value to the piece before they even take it home.

Also, don't forget that word of mouth spreads quickly. Your customer will eagerly mention to family and friends what a great experience they had with this amazing new design program at your store. Your business will reap the benefits.

Opening A Design

To customize a design, you must first choose and open it by double-clicking on the thumbnail image of the design in the Showcase. The model will now display full-screen on the Customize screen (the screen in which you will alter the model), and a copy of the design is automatically placed into the active Portfolio (discussed later in this chapter).

Notice that the CounterSketch interface will switch from the Search screen to the Customize screen. If you decide the item is not what you are looking for after all, click on the collection and make another selection. Or from Search mode, use the Home button to start from the very beginning of the program.

Interacting With The Design

With a design now open on the Customize screen, learn the skills necessary to control the model during the customization phase. Spin the model for a 360° tour of the design, and zoom in and out to examine the important details. Learn how to activate the pan hand and move the entire model to a new position on the Customize screen.



Zoom, Spin, And Pan

Use the center mouse wheel to scroll and zoom in and out when the cursor is placed on the center of the design.

- If you wish to zoom in on a specific area on the model, you can control the focus of the zoom by placing your cursor over the area you wish to enlarge while rolling the wheel away from you.
- To spin and examine the design, hold down the right mouse button while moving the mouse.
- To slide or pan the design, hold down the Shift key while holding down the right mouse button. Move the mouse to reposition the model on the Customize screen.

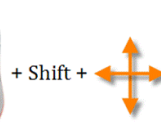
ZOOM



SPIN



PAN



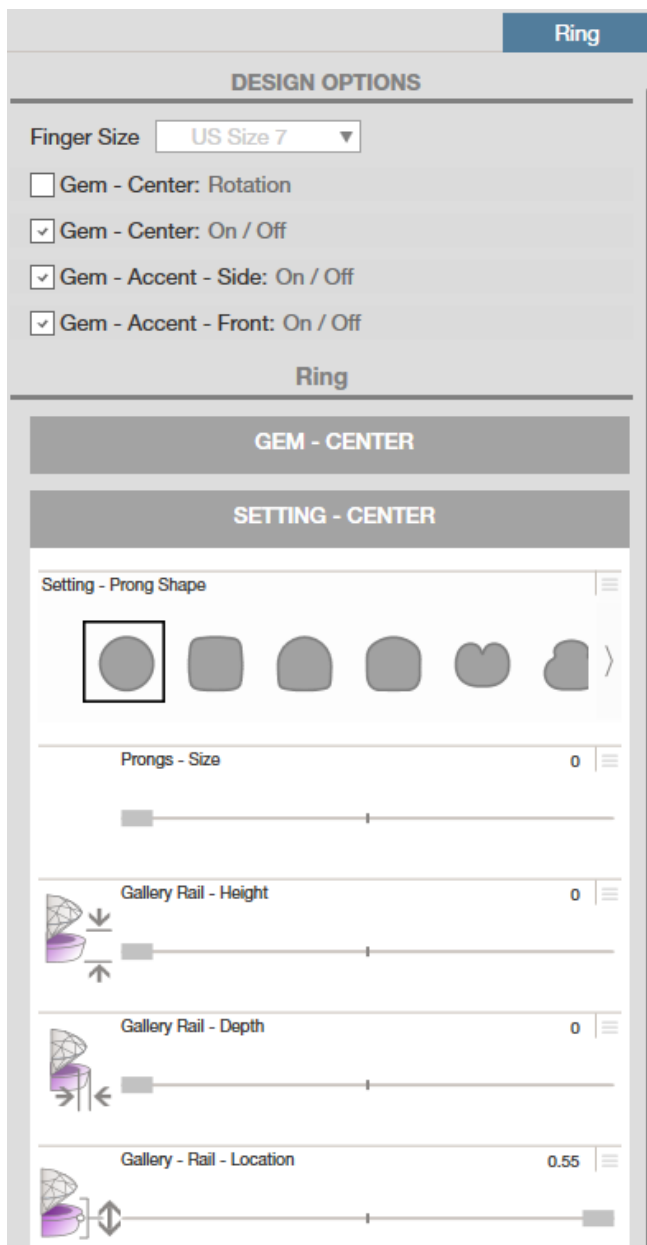
Ever & Ever Bridal Collection

SCS02623-RDF-0-00-EG

Order

THE DESIGN STACK

When a design is open on the Customize screen, its corresponding Design Stack (the set of controls pertaining to that specific model for customization purposes) loads along the left side of the screen. No matter how similar models may look, each unique design in CounterSketch is created with a slightly different approach and different levels of design flexibility. It is also important to keep in mind that each design may have a completely different layout and naming convention in the Design Stack. Taking the time to explore designs individually opens up a design-option world with endless possibilities.



Design Stack Controls

Each Design Stack consists of the Design Options category and additional category controls. The Design Options are the most common controls, including ring size and toggle controls to turn accent gemstones on and off. To expand each category's controls, click its title bar. Click the title bar a second time to hide them.

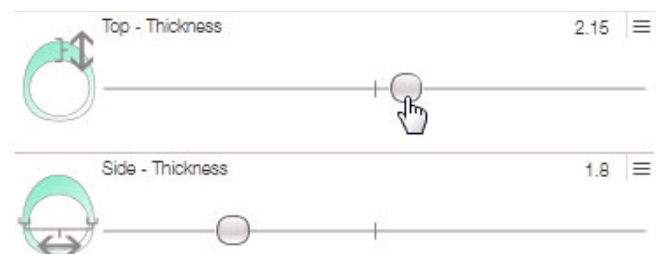
Toggle On/Off

A toggle control allows you to choose from two different options, most commonly On/Off. The square button with a check mark indicates the control is in the On position. If a check mark is not present, it indicates the control is in the Off position. Simply click on the button to toggle between the two positions.



Slider Controls

Click and drag any slider control to change the overall look of the design. The model will update automatically on the Customize screen. Each slider is labeled to provide insight into what aspect of the design it controls. Some slider controls have icons next to them to help visualize which part of the design the slider affects. Some sliders perform a lot of work behind the scenes, and it's imperative to give the program time to process the mathematical calculations necessary to create the design change. Hold down the control (CTRL) key while adjusting a slider to confine its movement to incremental measurements.



Undo and Redo

During the customize phase, when the client prefers the design before to a slider control change, click the Undo last action button or Redo last action button to step backward or forward a step, one slider control change at a time.



Expand Control Range

You will notice that some sliders allow you more flexibility within a piece than others. This is because the parameters were set by the individual who designed that specific piece. If you ever find that a slider's range is too limiting for your needs, look to see if the Expand Control Range option exists to the right of the slider (three small horizontal lines). Click on this menu, and select Expand Control Range. This will automatically allow more space for the slider to move. You may do this more than once if you wish. This can be helpful when you want to expand a ring shank to complement a very large stone. Within this menu, you are also given the option to reset the slider controls to their default at any time.

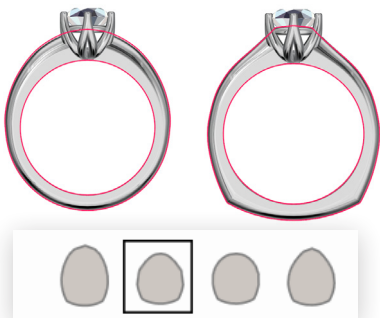


Shape Choosers

Shape Chooser menus are located within the Design Stack and consist of a selection of shapes that change the overall look of the design with the click of a mouse.



A shape chooser can define the overall shape of an object, or the cross section at specific locations on the design. For example, a ring design will use a shape chooser to define the outside shape of the design. It will also determine the shape of the Profile (cross-section) at a specific location along the design.



BREAKING A MODEL

Behind the scenes, some models use a function called a Boolean. A Booly-what... ? Boolean is a system of mathematical logic devised by George Boole and is used in some 3D CAD software packages. Booleans in a sense, acts like large cookie cutters that cut out areas in the metal of some designs. This is good to know because sometimes a Boolean operation fails. When this occurs, an item, or a portion of an item, may disappear, or may not appear as it should (such as the cut channel around a row of gems). Simply reposition the slider to a new location, so that the geometry makes sense to the computer, and the item will reappear.

Custom Gem Sizes

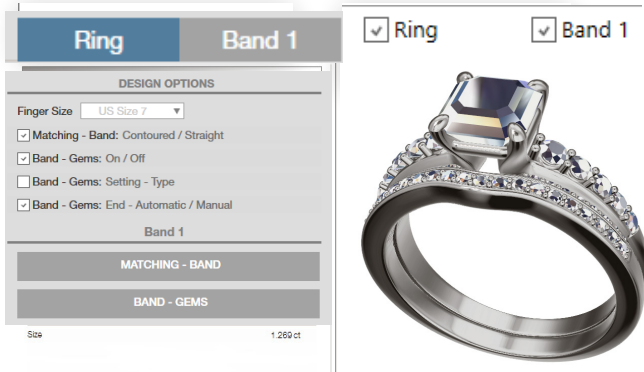


Certain gems have the ability to appear in custom sizes. For example, say your customer brings in an emerald-cut stone with dimensions slightly different from the default options available. The Height (H), Width (W), Depth (D), and Percentage (%) are adjustable. Each dimension can be altered by typing a new value within the text box. Press Enter to make the change. Make note that the depth and percentage are linked. This means that making a change to one of the values will automatically update the other.

Matching Bands

At the top left of the Customize screen, you will see one to three toggle controls indicating which complementary jewelry components are available. The first toggle control titled Ring or Pendant is the control to turn the main design On and Off, having it disappear and reappear on the screen. If one or two accompanying wedding bands have also been created for the design,

you will see the buttons to toggle them On and Off. Selecting Band 1 and/or 2 if available, will add a new tab with accompanying Design Stack created for it. You are given many design options for these accompanying bands, including whether or not you want gems and/or milgrain on the surface.



Reset Control To Default

Return any parameter to its default by clicking on the small menu (three small horizontal lines) to the right of the control. Select Reset Control to Default from the menu.

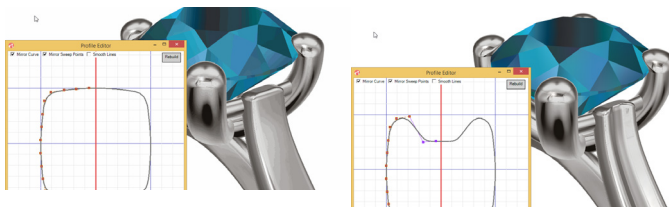
Editing Profiles

A very powerful approach to personalizing a design is to edit one or more profiles within the piece when in Customize mode. Editing a profile is a quick and easy way to make distinct design changes to the model.

You can change the overall look of an entire design by simply selecting a different profile from the Shape Chooser menu and leaving it unedited. If you cannot find the exact profile shape you have in mind, learn how to take an existing shape and change it on the fly.

From the Shape Chooser, select the profile you wish to edit. Try to locate something similar to the shape you wish to create. You might as well make it easy on yourself. The selected profile will highlight with a box surrounding it.

Take note, that once the Profile Editor menu is open, you cannot move or rotate the item on the Customize screen. It is important to spin the model and zoom-in



to a position where the changes taking place on the model can be easily viewed.

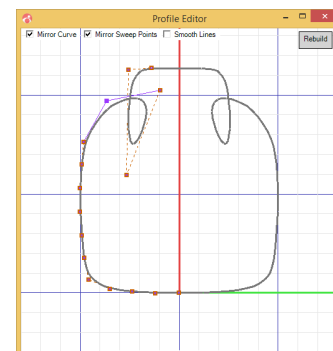
Click the small menu (three small horizontal lines) to the right of the shape chooser. Select Edit Profile and the Profile Editor menu will appear with the Profile enlarged. Small orange squares will appear along the left side of the Profile shape. The orange squares are called Control Points.



NOTE: As you modify the shape of the Profile you will be able to see the changes update in real time. Position the model where the changes are easily viewed, because you will not be able to change the view in the viewport once the edit window is open.

Profile Control Points

Drag any of the Control Points to the desired location, and watch the design update automatically on the screen. Select more than one point at a time, by holding down the left mouse button and dragging a box from left to right around multiple points. The selected points will highlight. You can then drag all of the selected points simultaneously to the new location. When you are finished with the alterations, click the X in the upper right corner to close the Profile Editor menu. If you wish to return to the original profile, enter the options again, and select Reset Control to Default.



NOTE: Do not cross or overlap control points. Doing so will create invalid geometry, causing problems with manufacturing, and can affect the accuracy of a quote.

DESIGN MANAGER

The Design Manager organizes and archives design sessions and is used to document the design consultation. Portfolios are created for each individual design consultation and are housed within the Design Manager. Base Designs (unedited models) appear in the left column (vertically). Each saved step, or Design History, will appear horizontally in a row to the right of the base design. Store valuable customer information, and view the Design History and Favorites within this powerful feature.

Portfolios can be used to create meaningful demonstrations based on customer demographics. The Design Manager and its associated Portfolios are an integral part of the design and presentation process.

Save

Alter a design as desired, and while making changes, document this process every step of the way. Save each new change by clicking the Save button located at the bottom of the Customize screen when using Customize and Freehand mode. This process is called Storyboarding and is an important habit to get into when working with clients. After clicking Save, the design will animate and minimize towards the Save button. This visual cue indicates the image was saved to the active Portfolio. The active Portfolio is listed at

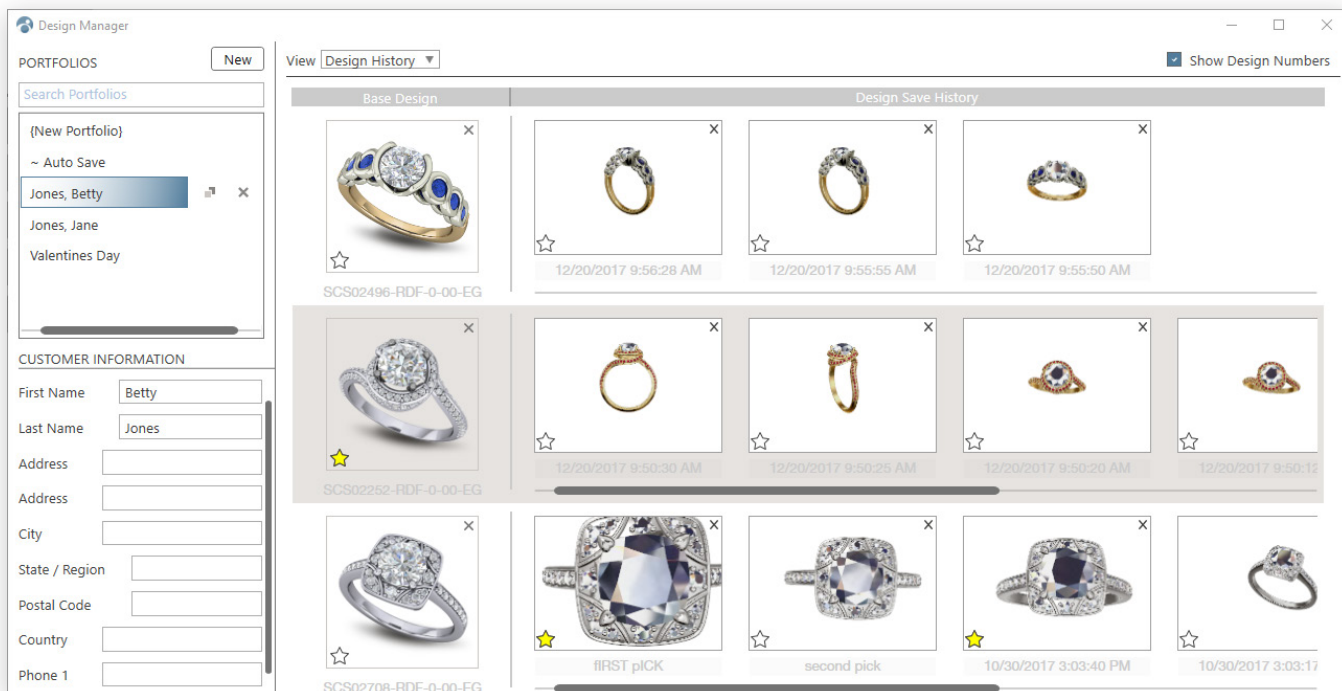
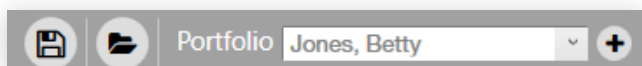
the top of the Customize screen. It defaults to {New Portfolio}.

Make sure to listen to your customer's verbal cues. If the customer likes the direction the design consultation is headed, save the changes throughout the entire design process. Due to your diligent habits, you can refer back to any stage of the consultation any time you or your customer desires. If the customer decides they do not like the direction the consultation is headed, you can simply load the design from any of the save points at anytime during the consultation.

INVOLVEMENT IS KEY

During a live design consultation, be sure to keep the client involved. Do not forget to ask them lots of questions, so you have a clear idea where you are heading in the program. Remember, it is not about what the program can do but about helping your customer create the design of her dreams.

If it's fun for the customer, they will become more invested in the entire process. If using the program is nothing but work for your customer, the entire point of CounterSketch has been lost. The whole concept and design is about creating a fun and interactive jewelry selling experience.

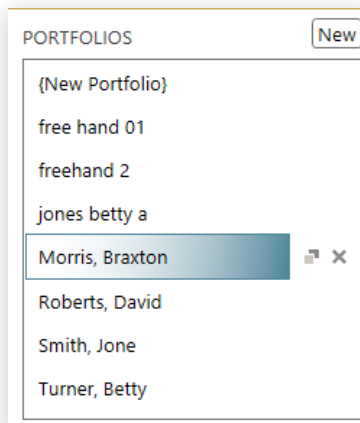


Design Manager

After designs are saved to a Portfolio and you wish to retrieve one, simply click on the Design Manager button to view all of your saved designs (Design History), and their associated model. The Design Manager menu stores all Portfolios and their associated customer information.

In the top left corner, you will see all Portfolios listed in alphabetical order. Below, you will find the customer information for the active Portfolio (highlighted).

Each Portfolio organizes all of the unedited models vertically in a column along the left. Each saved step will appear horizontally in a row to the right of its model. The most recent Save point is listed first, next to its model. This organizational method pairs all of the Save Points (Design History) with its model, helping you keep associated designs grouped. You can easily discuss their design options when you are reviewing the consultation with your client.



Load a Portfolio

Access saved Portfolios using the drop down menu located at the bottom of the Customize screen and choosing the desired Portfolio. After loading a Portfolio, the Save feature will store the save point under the active Portfolio.

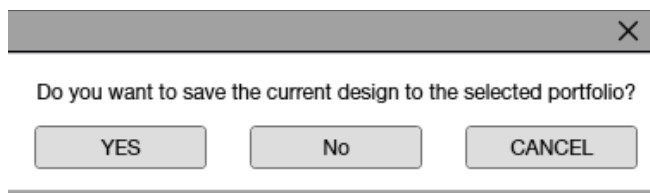
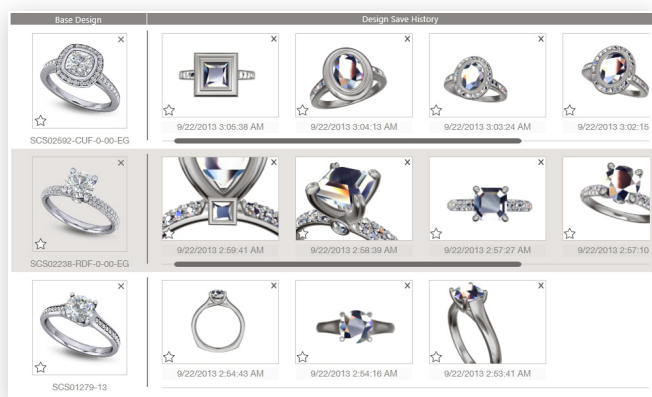


Additionally, you can access all Portfolios by clicking on Design Manager located along the bottom of the Customize screen. The Design Manager menu will appear, and you will see every saved Portfolio listed alphabetically in the top left corner. Use the scroll bar to navigate through the list, and click on any name to load the corresponding portfolio.

Load a Design

To open a particular design from a Portfolio, double-click the desired thumbnail image, and the corresponding design will open as a full-screen image on the Customize screen. If you wish to revisit a Save Point, re-enter the Design Manager, and repeat this sequence.

NOTE: When loading a design from the Design Manager onto the Customize screen when one already exists there, CounterSketch will ask if you wish to save the item currently on the screen first. Choosing No will overwrite the design, losing it if it has not previously been saved.



TIPS FOR SAVING

Save Points are key in visualizing changes throughout the design process. Rotate the model to a meaningful position, and zoom in to display relevant design elements when saving. When reviewing the design, the vantage point of the save is documented, leaving you a visual cue at that particular point in the design consultation.

New Portfolio

Click on New, located in the top left corner of the Design Manager, to create a blank Portfolio. You will then be prompted to enter the desired name for the Portfolio. Then, click Create. If you decide a new Portfolio is not needed, click Cancel.



Naming Portfolios

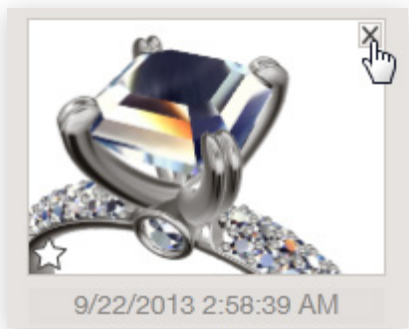
At any point during the consultation, a Portfolio can be created. By default, a temporary Portfolio is automatically loaded under the name {New Portfolio}.

The current Portfolio is listed at the bottom of the Customize screen. To rename the Portfolio, simply double-click on the title, to highlight it. Type the new title into the text box. Pick something that is logical and easy to remember. We recommend using the customer's last name, first name, then month and year of the design session. When you are ready to save, simply press Enter on the keyboard. If you begin in the {New Portfolio} and decide to rename it, a separate Portfolio will be created, leaving the {New Portfolio} blank and unchanged. If you begin with another named Portfolio (ex: a Demo Portfolio), the name changes on that Portfolio permanently.

An alternative option for renaming a Portfolio can be conducted within the Design Manager. Simply click on the desired Portfolio, and choose Duplicate. Enter a new name, and click Create.

USER TIP

Create a naming convention for Portfolios, and implement it consistently throughout your store. If all of your employees use the same naming convention, it will be easy to locate files in the event an employee is out of the office or leaves the company completely.



Customer Info

You also have the option to enter your customer's information here, including their first and last name, phone number, and address. The information will automatically transfer to the Order screen, saving you a step when ordering a piece from this client's portfolio. You may also opt to leave out this information, and fill it in later during the Order process.

CUSTOMER INFORMATION	
First Name	Braxton
Last Name	Morris
Address	173d Iltoria
Address	
City	Davenport
State/Region	Iowa
Postal Code	52803
Country	USA
Phone	563 357 6772
Email	sonshine@gemvision.co

Delete Portfolio

Delete a Portfolio, its corresponding models, and Design History files permanently from CounterSketch and your computer by entering the Design Manager and clicking on the name of the Portfolio. After doing so, two icons will appear. Click the small X and dialog will appear asking, "Delete current Portfolio?" Click Delete to permanently remove the files. Cancel will leave the files untouched.



Delete can help to manage your files and get rid of old or outdated information. Keep in mind, however, that memory storage is not expensive, and old client information can sometimes be useful. One example would be when a husband needs some help with an anniversary gift for his wife. An old portfolio might refresh his memory and help him (and you!) visualize his wife's aesthetic. Load the Portfolio and custom design a pair of earrings to complement her engagement ring.

Duplicate Portfolio

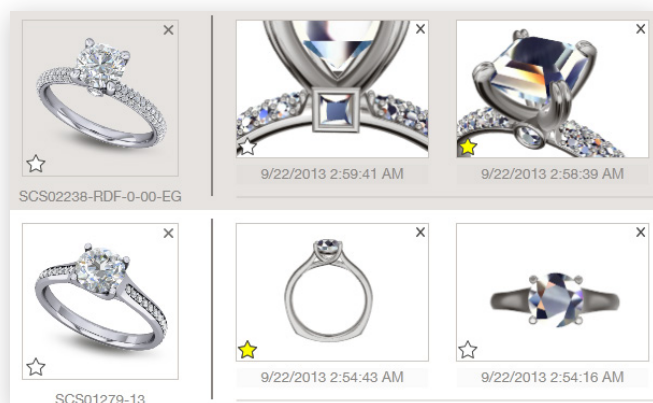
This option allows you to begin with an existing Portfolio (i.e., a demo folder you created to target a specific demographic) and duplicate it under a new name when your demo turns into a sale. By doing so, you leave the demo folder intact while creating a new Portfolio under your customer's name. Simply enter the Design Manager, and highlight the name of the Portfolio you wish to copy. The Duplicate icon will appear (two small boxes). Click the icon, and dialog will appear asking, "Create a Copy of this Portfolio?" Enter a name into the text box, and click Create. Choosing Cancel will reverse the action.

Deleting Saved Designs

Delete any unwanted steps, or Save during the design consultation by entering the Design Manager and clicking the small X located in the upper right corner of each thumbnail image. The option to delete will appear. Clicking Yes will permanently remove the thumbnail image and its associated file.

Favorites

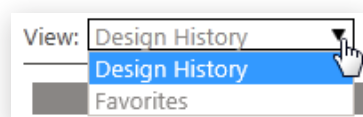
Favorites helps with the decision-making process, allowing you to quickly mark and identify important designs during the consultation and review them later. Mark your customer's favorites by clicking the Star icon on the bottom left of each thumbnail image within Design Manager. Later, when reviewing the design consultation and looking at the Storyboard, the Favorite icon will be a helpful reminder of the design's importance.



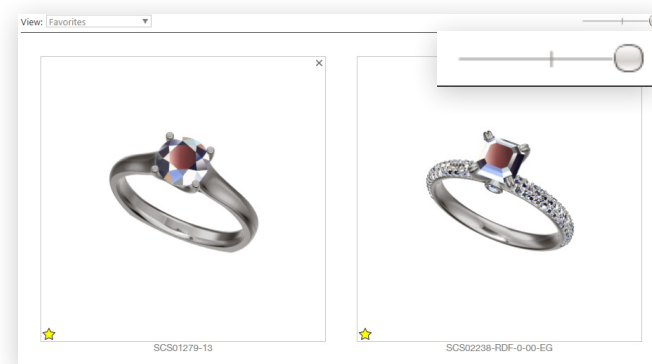
Sorting the View

The Design Manager can be sorted to display the Design History, or you can filter the view further and display only the items marked as Favorites. The customer can then compare the different design alterations side by side. Review the items, and eliminate the steps they like least. This is an important step to help your customer focus on the top choices.

By default, the Design Manager is set to view Design History, which includes every save point and the models. To isolate and view only Favorites, locate the View drop-down menu, and choose Favorites. The Favorites view will display all designs at the same angle so they can easily be compared. Use the slider



bar, located in the top right corner, to make the images larger. Scale the menu down to provide a more in-scale view of the item, or to see more results. In this view, help your client make their final decision by eliminating designs from this menu. Just click the stars to deselect them.



FAVORITES VIEWER

Mark your customer's favorite designs, and view them all at once with the Favorites Viewer. This function helps you narrow down the top selections by comparing designs side-by-side.

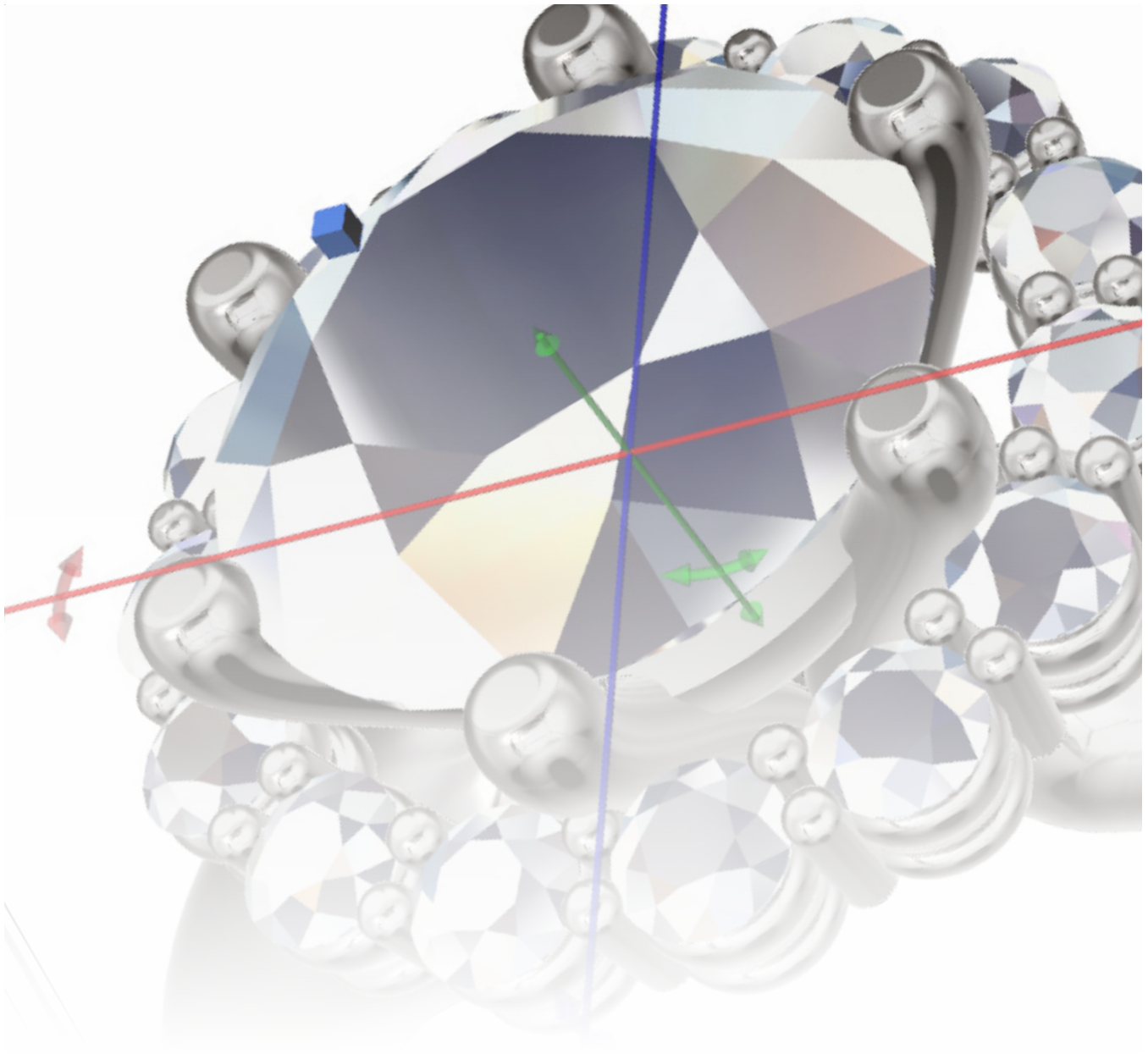
Show Model Number

The options to Show Design Numbers can be toggled On to see the model's corresponding number. The model can be entered into the Search for Products field.

☒ Show Design Numbers

BACKING UP YOUR PORTFOLIOS

All Portfolios are saved to the computer's hard drive and can be recalled at any time. It is wise to back up your saved Portfolios on a regular basis. Go to CounterSketch Menu > Backup > Backup, and save a second copy of the information in a location other than the existing computer, to ensure your information is safe and will not be lost. In the event the computer's hard drive does fail, the Portfolios can then be restored (See Backup/Restore for more). Please call Gemvision Technical Support if you need any help backing up your files.



CHAPTER 3

Freehand Mode

Only available in CounterSketch Studio



INTERACT WITH THE DESIGN

Choose design elements from within the Freehand mode library, and add them to your model. Use the Viewport Control Handles to move, scale, rotate, and bend a part until it looks just right. Freehand mode removes design limitations and allows you to explore your creative side. Go ahead and imagine the possibilities.

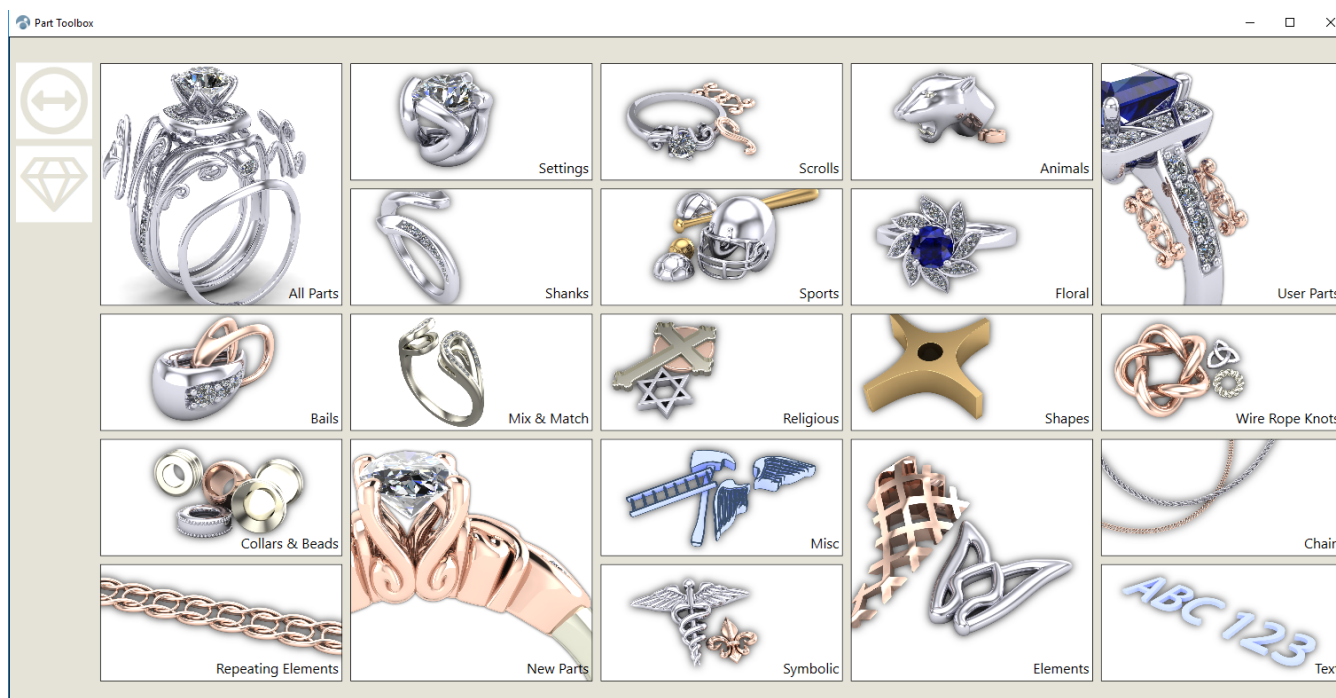
FREEHAND MODE

Freehand mode offers an entirely new way of modeling and gives you the power to delight your customer more than ever before. Add gems and design elements to an existing CounterSketch design, or create a new design from the ground up. Freehand mode enables you to say Yes to almost every design request a customer makes.

Whether you are working in Customize mode and decide to enter Freehand mode to add embellishments to an existing design, or you decide to start in Freehand mode, involving your client in the decision-making process gives them a feeling of ownership over the creation of their design and will go a long way to closing the sale.

Navigating the Library

To get started, click on the plus sign near the bottom of the Customize screen. The Freehand Part Toolbox window opens. The parts are organized into categories that you can access by clicking on the tiles in the Part Toolbox. Parts can be added — even in combination — to an existing CounterSketch design or can be used to create a model from scratch. Click on any tile to load and view its associated library. Use the scroll bar to the right to peruse the items.



After identifying the part you wish to explore, double-click the thumbnail image to load the part onto the Customize screen. The type of part you choose will determine the controls you have to manipulate the object.

Library Part Types

There are two different part types that are easily identifiable by the item number below the part. A model number that begins with indicates that it is a CounterPart. If the model number begins with an SP this means it is a Design Element. It is important to understand the difference between these two distinct part types.



CounterParts

Identifiable by the CP in the model number, a CounterPart is a parametric part with associated slider controls (similar to a model's Design Stack in Customize) that can be used to manipulate and alter the item in countless ways. After loading a CounterPart onto the Customize screen, its associated slider controls automatically appear along the left side of the interface. Title bars, indicating the types of controls that you will find, are listed. To expand each set of controls, click its corresponding title bar. Click the title bar a second time to hide them. Explore the Design Stack using the sliders, toggles, and shape choosers (For a quick refresher on how to manipulate a Design Stack, look to Chapter Two, titled Customize).

Design Elements

Unlike CounterParts, Design Elements have no associated sliders. Design Elements are non-parametric parts that can be manipulated using the Viewport Control Handles. Read further to understand how to manipulate a CounterPart or Design Element using the Viewport Control Handles (VCH).

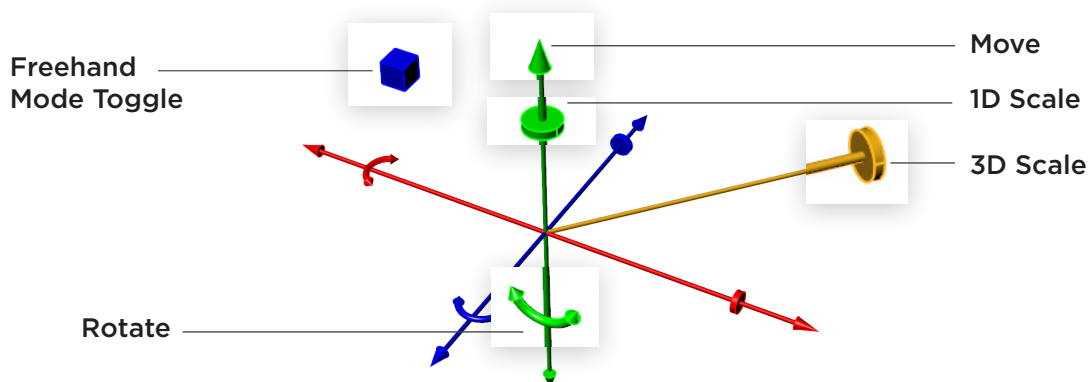
USING COUNTERPARTS AND DESIGN ELEMENTS

Viewport Control Handles

The Viewport Control Handles (VCH) used to control CounterParts and Design Elements are similar but not the same. A CounterPart can be moved and rotated, and many CounterParts can also be bent. If gemstones are included in the CounterPart, this will usually eliminate the Bend control. The added functionality within the Design Stack allows versatility to manipulate CounterParts.

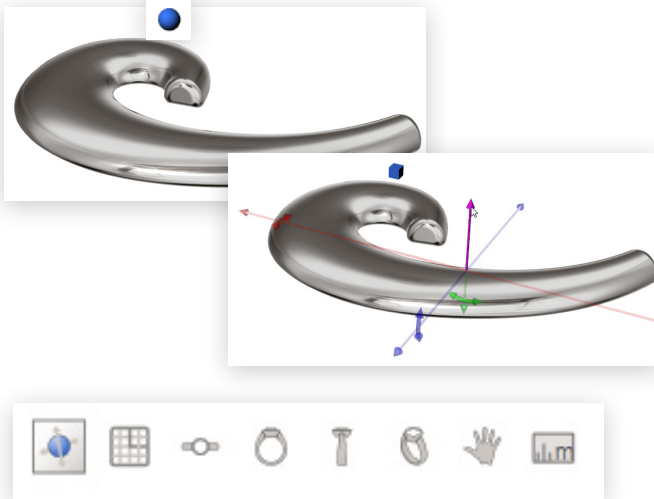
Design Elements are non-parametric parts that have more flexibility within the VCH. Easily move, scale, rotate, or bend a design element on the Customize screen to fit with your design motif.

NOTE: The Viewport Control Handles (VCH) that are available depend on the type of library part being customized. Each axis control can be identified by the VCH color. The Freehand Toggle Mode toggles the controls into an entirely different mode.



Viewport Control Handle Toggle

After double-clicking a part in the Freehand library, it will appear on the Customize screen and a small blue sphere will appear next to the item. Click the blue sphere to toggle on the item's Viewport Control Handles.

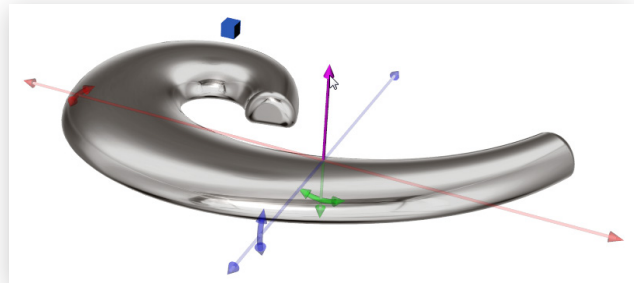


To temporarily remove the blue spheres from the Customize screen, use the VCH Toggle within the Display Controls located along the top-right corner of the interface. This temporarily removes all of the blue spheres from the screen, so you can view the design without any visual interruption. Remember to toggle the blue spheres back On to give you access to the Viewport Control Handles when you wish to further alter the part.

NOTE: Viewport Control Handles are accessible by clicking on the blue sphere that appears next to the Design Element, or CounterPart. If the blue sphere is missing, toggle them On using the first icon within the Display Controls (located in the top right corner of the Customize screen).

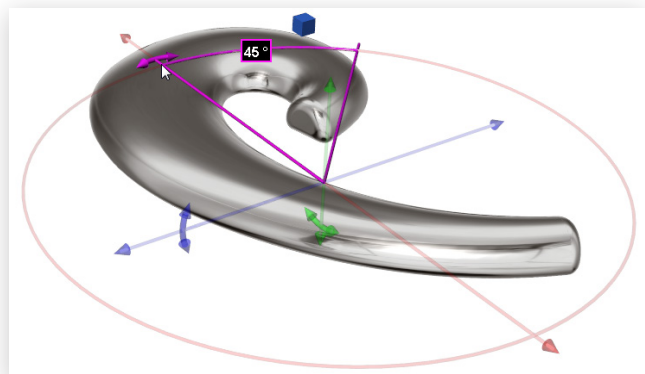
Move

CounterParts and Design Elements can easily be repositioned on the Customize screen using the Move handles. The Move Handles are identifiable as small cones and are located on each of the X, Y, and Z axes. These controls allow you to move one axis at a time — either left and right, towards and away, or up and down. To do so, hover your mouse over the appropriate Move Handle until it highlights. Then right-click and drag the end of the axis you wish to move to its new location.



Rotate

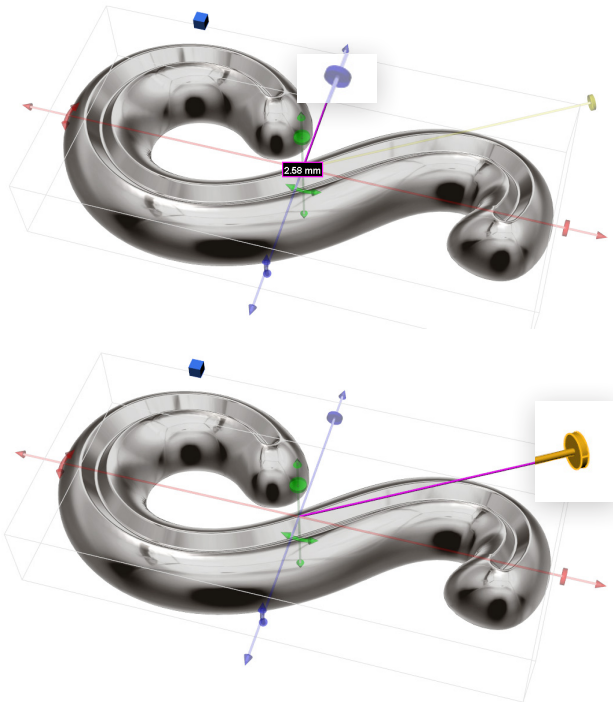
Use the Rotation Control Handle (one for each axis) to rotate an object into position. Rotate Control Handles are identifiable as a curved line with a double arrow. Hover your mouse over the control, and it will highlight with a full circle to indicate which axis you will be rotating. As soon as you begin the rotation, a dialog will appear to report the angle of the rotation in degrees. This is helpful information in the event that you have another part that needs to match the angle. Holding down the Shift key while rotating will confine the rotation angle to 45 degree increments. This is extremely helpful to quickly rotate 45 or 90 degrees. Each time you use the Rotation handle, the angle will reset from 0 degrees, so if exact measurements are needed, pay special attention to this information.



Scale

Design Elements have additional Scale Control Handles which allow you to quickly alter the size and aspect ratio of the part. Scale Handles appear as discs located just below the Move Handles, and can be located on the X, Y, and Z axes. Hover your mouse over the Scale Handle, and it will highlight a small box, surrounding the object. This bounding box is used to measure the object, and feedback will appear at the center of the part, indicating the size in millimeters.

If you wish for the object to be larger or smaller and to maintain the exact aspect ratio (relative size in each axis), use the three-dimensional Scale Handle which appears as a yellow disc.



NOTE: Only one object can have Viewport Control Handles at a time. Toggle between different objects by clicking on its corresponding blue sphere.

NOTE: Use Undo and Redo to step backward or forward.

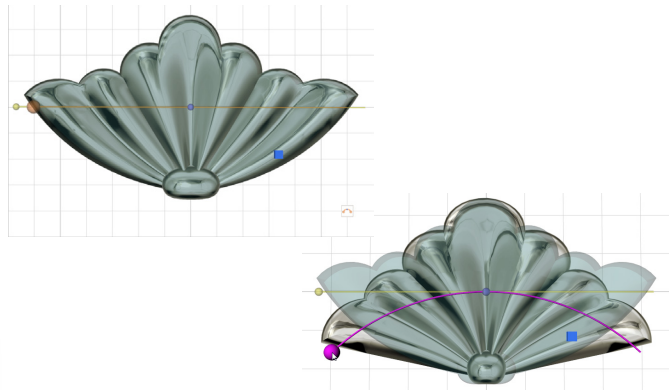


Bend

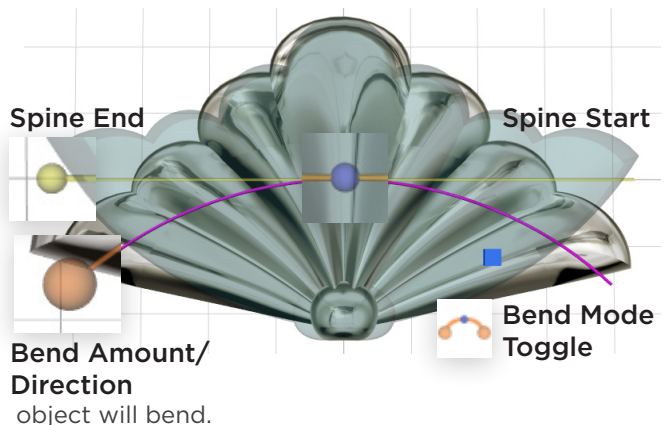
The Bend control allows you to manipulate Design Elements so that they conform to the overall shape of the part you are mating them with or perhaps to fit them into an opening, etc. Bend can also be used to drastically change the overall appearance of a Design Element.

Access the Bend Handles by activating the Viewport Control Handles, then clicking the blue cube. To toggle between four options: no handles, Viewport Control Handles (Move, Scale, and Rotate), Polar Array, and Bend.

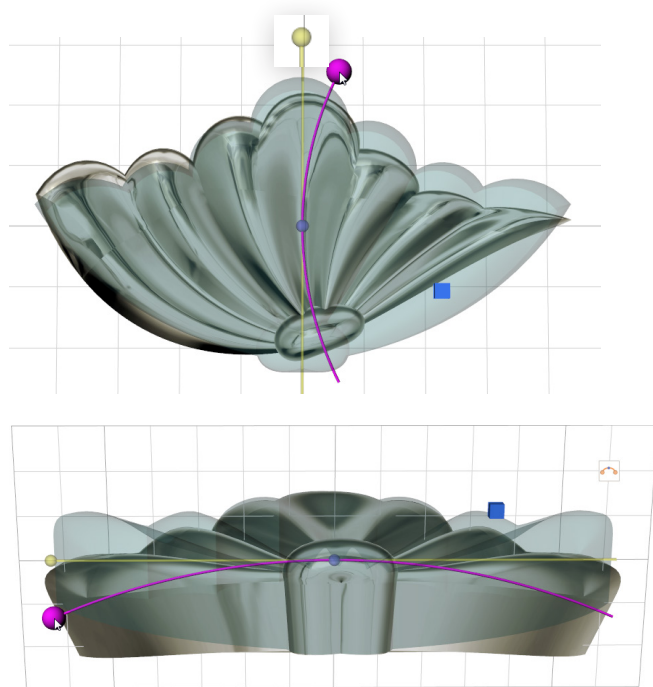
When Bend is activated, a grid will appear that runs through the object, indicating the plane on which the bend will take place. Bend the object by clicking and dragging the large orange sphere up or down and in or out. A shadow of the object, previous to the bend, will remain to indicate the original shape.



Adjust the amount of the bend by repositioning the Bend Spine's start point and end point. When the points are close together, small adjustments will make drastic changes. Click and drag the spine's start point 90 degrees to change the direction the



Change the axis you are bending by spinning the Viewport so that you are looking flat at the object from the vantage point you would like to bend. The grid behind the object will reposition itself, providing a visual cue as to which axis will bend.

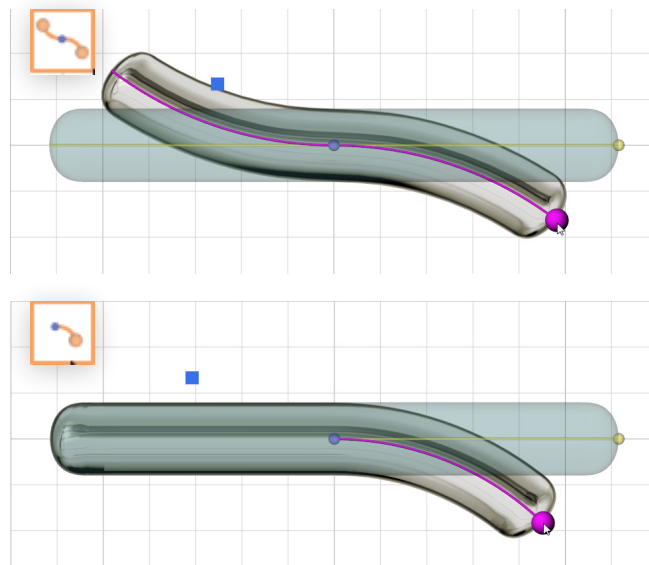
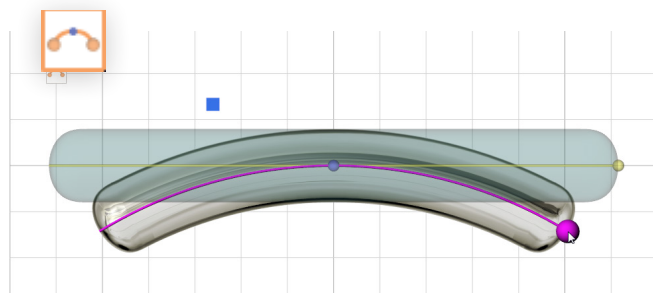


NOTE: Located at the top right of the interface, toggle between Top Down, Through Finger, and Side View to quickly change vantage points. Remember to toggle back to Perspective View if you wish to spin the design on the Customize screen.



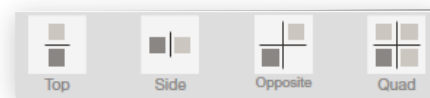
There are three types of bend that manipulate the part: Symmetrical, Opposite, and One Side. While in Bend mode, toggle between these by clicking the small Bend icon located slightly above and to the side of the part.

Symmetrical bends both sides of the object in the same direction. Opposite bends both sides in opposite directions. One Side bends one side of the model independently from the other. Adjust the side by using the Bend Spine end point.



Mirror

Mirror parts from front to back, side to side, opposite, or across all four quadrants. On the Customize screen, the Mirror tools are located at the top of the Stack within Freehand mode. The icons will help you determine which Mirror type to use. Click on one of the Mirror types, to turn it On. Please note that mirrored parts can appear on top of one another, and there is no visual cue when this occurs. This can impact the accuracy of your quotes.



Imagine if you have a Halo-style Counterpart with fifteen gemstones mirrored using the Quad option. If the parts were in the exact same location, it would appear as one object. However, its mirrored Counterparts would have forty-five gemstones, adding up to a hefty price tag.

NOTE: When using the Mirror options, be sure that gemstones do not overlap. This can cause inaccurate quotes.

Flip

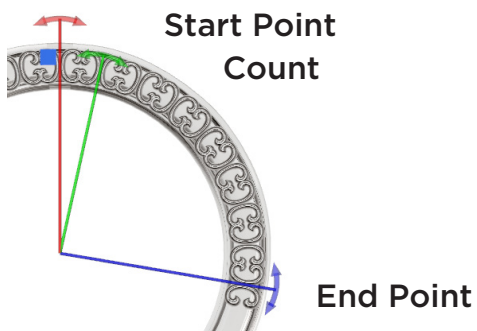
Flip mirrors a part across its own center as opposed to the from the center of the Customize screen. This can be useful when a piece is asymmetrical and you need to face the opposite direction.



Polar Array

Polar Array allows you to create a series of evenly spaced objects around a central point.

To access Polar Array, click on the Freehand Mode Toggle (blue cube) on your Freehand element, until the Polar array icon shows up in the corner of your element (it will appear after the bend icon). Click on the Polar Array Icon to activate it. This will replace the Polar Array icon with three more icons. The top icon is the Polar Array Mode Toggle. The next icon is a Symmetry Toggle. We will cover the additional Array Modes later in the section.



When Polar Array is activated, a new set of Viewport Control Handles will appear on the selected Freehand Part. There are three VCH for Array: Start Point, Count, and End Point.

The red handle is the Start Point and will rotate your array. The green handle adjusts the Count or amount of parts in our array. The blue handle adjusts the End Point for your array. Arrayed objects will only appear between the Start Point and End Point.

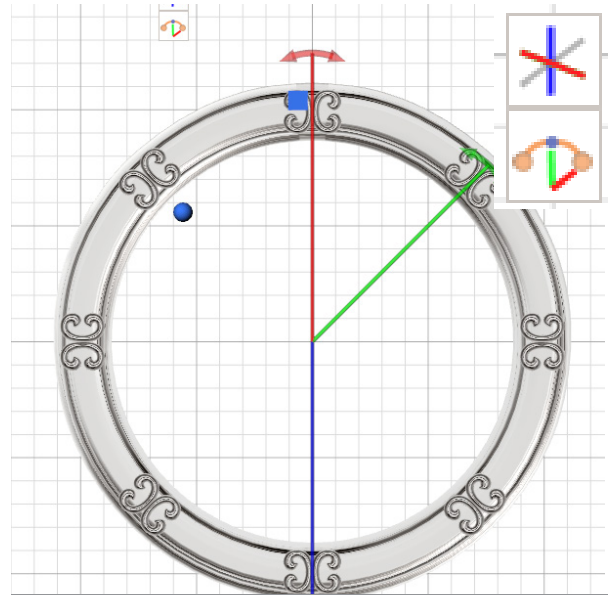
NOTE: Use caution when using the Count handle. Adding too many parts to an array, especially if they are complex, can cause the software to crash.

There are additional Array Modes that you can access using the Array Mode Toggles that appear when Polar Array is active.

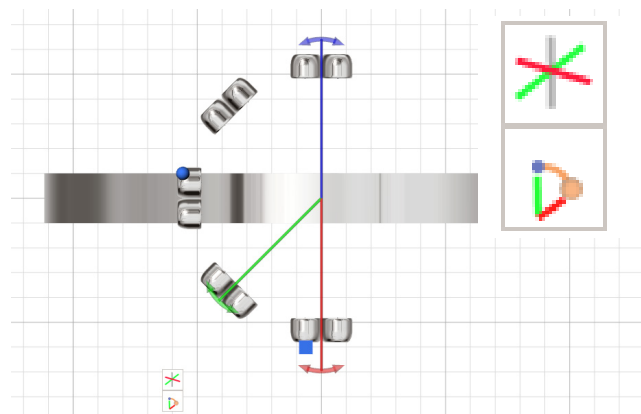


The top toggle controls whether your objects will array in XY (Looking Down View) or ZX (Through Finger View).

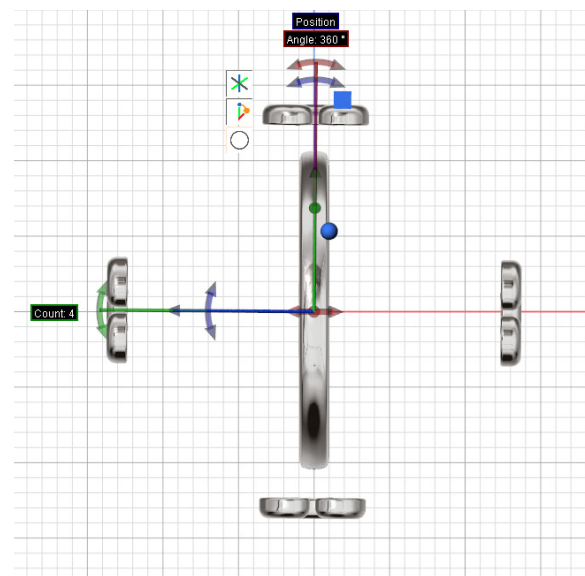
The default is Array XY. To toggle the modes, click on the top button.



Polar Array in Through Finger View

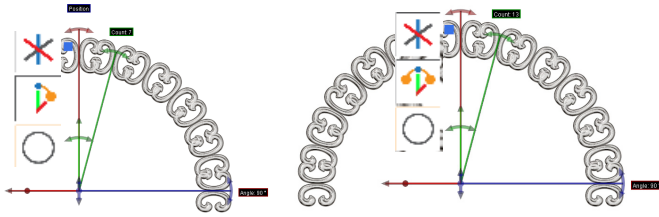


Polar Array in the Looking Down View

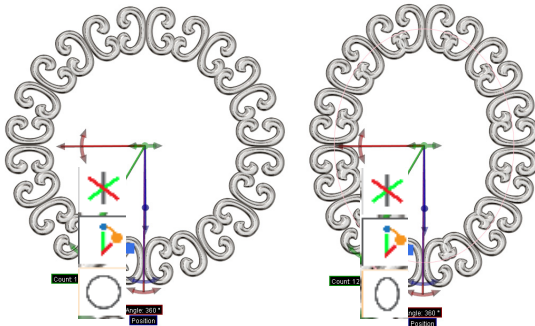


Polar Array in the Side View

Polar Array Symmetry: When you toggle on the symmetry option the an equal number of parts will array from the center part.



Polar Array Shape: The last toggle in Array controls the shape of the array. Click on this icon to toggle through the different gem shaped paths available for polar array.



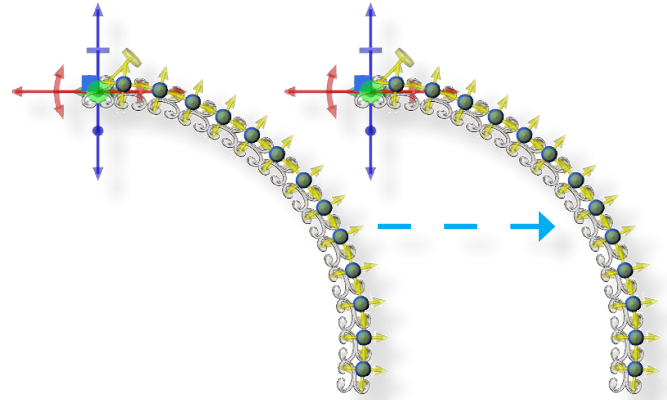
Polar Array Position VCH: At the center of of the polar array are Viewport Control handles that allow you to reposition the location of the arrayed objects. These controls behave in the same way as the move and rotate controls of the Viewport Control Handles. These controls come into play when you arrayed objects are meant to be center around something other than that the center of the world.

Multi-Select

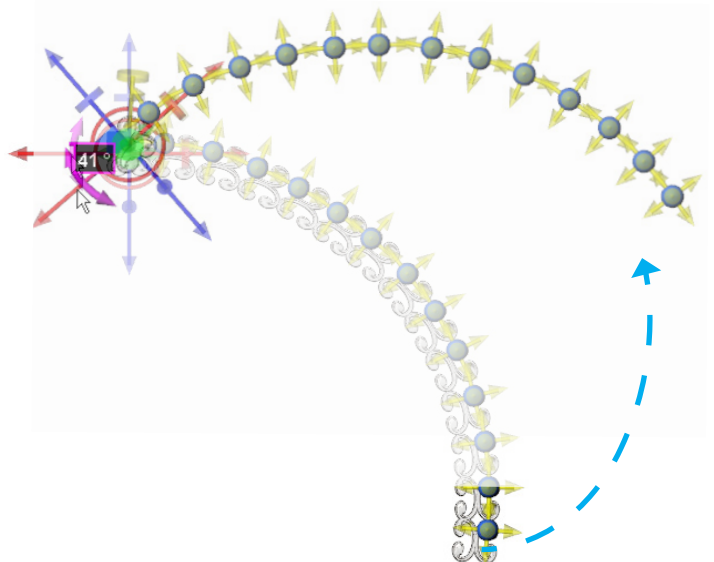
Multi-Seect allows you to move, scale, and rotate multiple Freehand parts simultaneously.

Multi-Select by holding down the Control key and clicking on multiple objects in the parts tray. Each additional Freehand Part selected after the first will appear with a set of yellow arrows on the Viewport Control Handle Toggle. Remove an object from a group by holding Control key and clicking on the object in the parts tray again again. The first object selected will display the traditional Viewport Control Handles and act as the Control Object for the subsequent objects (where it moves the other objects follow).

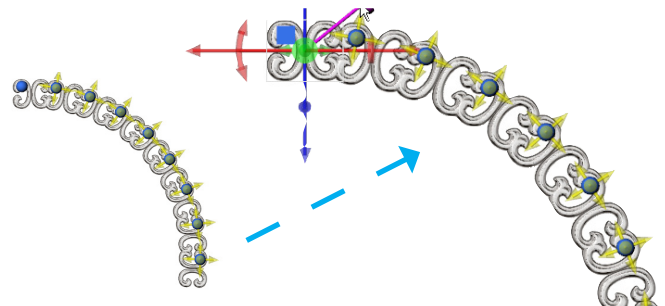
Move: When you move the Control Object all the objects in the group move together maintaining the overall shape of the selection



Rotate: When you rotate, the whole selection (first object selected).



Scale: Scaling 3D (the Yellow Scale Handle) will maintain the shape of the selection but it will get larger. 1D scaling (the Red, Blue, or Green Scale Handles) works but won't necessarily maintain the shape of your selection.



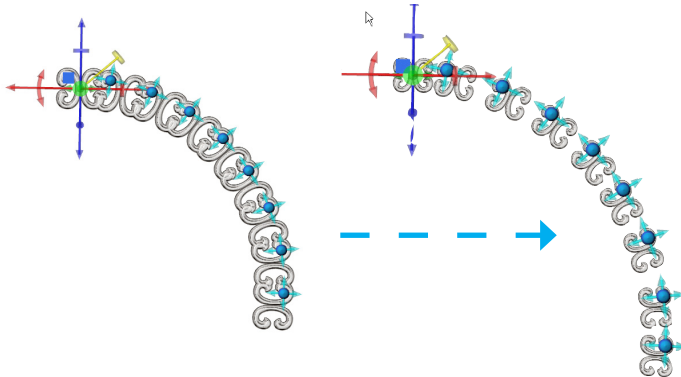
Global vs Local: When working with Freehand a new toggle will appear near the top of the screen with the view controls. This is the Global Rotation toggle. This only has any affect when working with the multi-selected objects. This toggle will affect how objects behave in a group. Generally speaking when Global Rotation is on the secondary objects (children) will move scale and rotate relative to the primary object (parent). Global Rotation is on by default and the previous examples is how a group would be have with Global rotation on in a given scenario. The following examples are when Global Rotation is off.



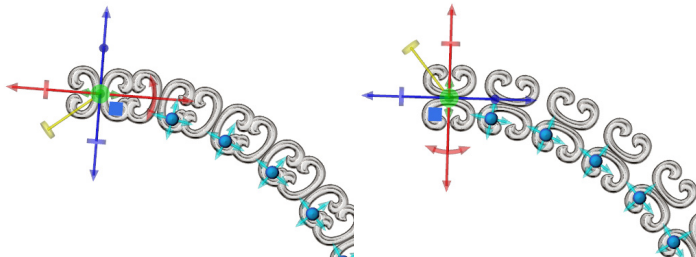
Multi-Selection (Global Rotation Off): Create a Group by holding down the Control (CTRL) key and clicking on multiple objects in the parts tray. Each additional Freehand Part selected will appear with a set of blue arrows on the Viewport Control Handle Toggle.

NOTE: The following examples demonstrate the slight differences between grouping with Global Rotation Off

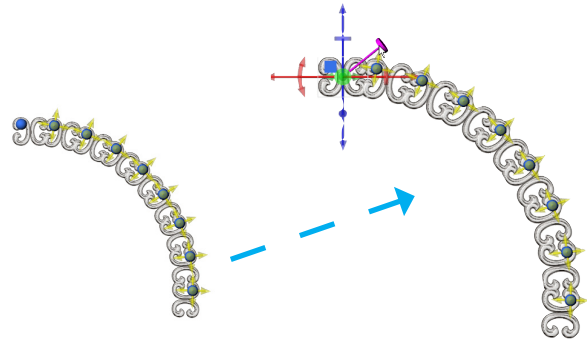
Move: When you move the Control Object each object in the group moves the same amount or magnitude but in relation to its own center and not the group's. The group's overall shape will change.



Rotate: When you rotate the Control Object, each object in the group rotates the same amount, but relative to its own center as opposed to the Control Object's center.



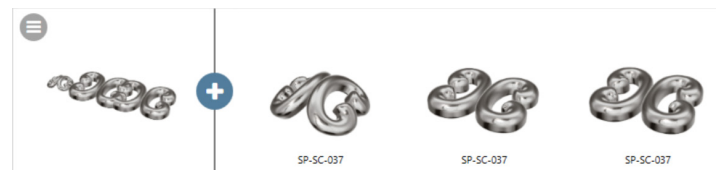
Scale: When you scale a group, the objects in the group will scale relative to their own center.



NOTE: You cannot bend a group of objects. If you bend the Control Object, the other objects in the group will not update to match the Control Object. You can only move, scale, and rotate groups.

Parts Tray

After loading any Design Element or CounterPart onto the Customize screen, they appear in the Parts Tray at the bottom of the Customize Screen.



The area at the far left is a screen shot of all of you parts that are on the Customize Screen. Then to the right is a screen shot of each individual Freehand part. The parts appear in the order that they were added from left to right.

Simply click another part in the list to view its controls and activate its Viewport Control Handles. As an alternative, click the blue sphere on the Customize screen, and the corresponding Design Stack will highlight within the Parts tray.



Part Action Menu: Appears as three horizontal lines the active part in the Parts Tray. Click the three lines and the Part Action Menu will appear.



Create Group: If you have multiple parts selected this command will create a more permanent group. Parts will remain grouped until the ungroup command is run.

Duplicate: Creates a duplicate of the selected part. The new part will appear in the exact location as the original — so make sure to move it to a new location. Continue manipulating either part as desired.

Toggle Metal: Allows you to assign the part as either a Primary or Secondary Metal and corresponds to the metal options displayed along the right side of the interface.

Visibility: (eye icon) will toggle the part On or Off. This is especially useful when comparing parts and making design decisions.

Create User Part: Add the selected part or part group to your user library.

Delete: Permanently removes the part from the Parts List and the Customize screen. The part still remains in the library and can be added again at anytime by navigating to the part within the library and double-clicking to bring it back out onto the Customize screen.

Ungroup: Only appears as an option on grouped parts. This will ungroup parts and return them to their individual components.

NOTE: As your designs become more complex, you may wish to view the design without the distraction of the blue spheres. To do so, toggle them On or Off using the first icon in the Display Control Panel located in the top right corner of the Customize screen.

SHOW AND HIDE TOGGLE

Use the Show/Hide toggle to compare alternate design options for your client to choose. Including your client in the decision-making process creates a feeling of ownership and makes a fun and exciting shopping experience.



Import Part

Import your Matrix parts right into the CounterSketch Parts Library. To do so, the file must have all layers turned on, no hidden objects, all Curves deleted and be saved as a .3dm file (the default file extension within Matrix). Matrix Metal Layer 01 and 03 will be treated as Primary Metal. Whereas Metal Layer 02 and 04 will be Secondary Metal. Gem Layers 01 and 04 are treated as the Center Stone and 02 and 03 are Side Stones and Accent Stones respectively. Next, locate Import Part from within the Countersketch Menu (CounterSketch Icon in the top-left corner of the interface), and navigate to the location on your hard drive where the file is saved. Then, choose Open. After doing so, a new tab titled User will appear and your part becomes available as a CounterSketch Design Element.

NOTE: Make major adjustments to the ring size and overall shape prior to entering Freehand mode. After designing the item with CounterParts and Design Elements, you will not have to reposition all of the items on-screen because of a change to the finger size.

Parts Toolbox Commands

In the parts toolbox there are three tools that are here for quick access

Ring Rail Guide: This tool is helpful when building a ring from scratch in Freehand Mode. Set the ring size, width and thickness. The Ring Rail Guide is only there as a reference and won't be part of the final design.



Add a Gem: Adds the gem only design element to the viewport. This part is also available in the settings tile of the toolbox but this makes this frequently used part even more convenient.





CHAPTER **4**

Appearance



PRESENTATION

CounterSketch contains helpful tools you will use to create polished presentations. The functionality within the program allows you to immediately change the materials assigned to the jewelry item on the Customize screen, create stunning images using the Render feature, and help your client visualize wearing it with the Try On feature. These tools assist you in presenting and selling with CounterSketch.

Display Controls

Running along the top right corner of the Customize screen are the Display Controls. The icons from left to right are —



Show/Hide Viewport Control Handles displays the Viewport Control Handles within Freehand mode (available only in Studio version).

Show/Hide Grid Lines displays a grid representing millimeter increments for reference purposes when modifying a design.

Top View, Through Finger View, Side View, and Perspective allow you to view the design from the corresponding angles. Click Perspective View to return to the view that automatically loads when the model is initially loaded onto the Customize screen window.



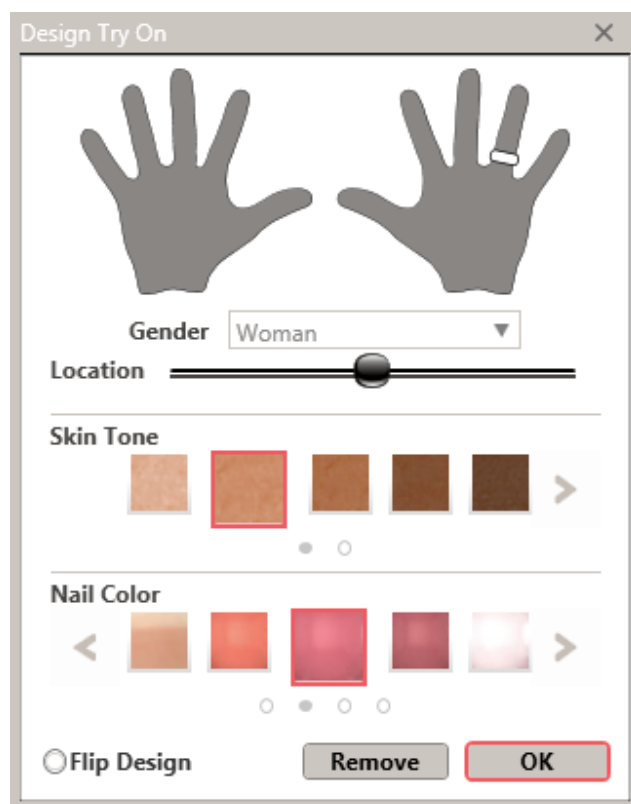
SEND CUSTOMERS HOME WITH THEIR DESIGNS

With photo-realistic rendering at your fingertips, CounterSketch makes it easy to email your customer his final custom design. You also have the option to print and send it home with him. Using this amazing feature will reinforce to your customers that they have chosen the right jeweler.

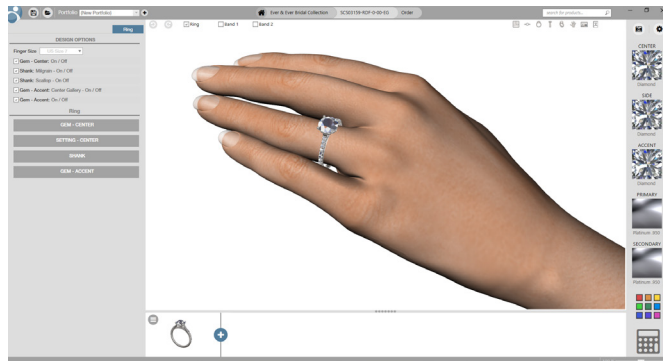
Try On The hand icon in the Display Controls menu is Try On. Use this feature to help your client visualize in-scale how her ring design will look on her own hand. Begin with the chosen design on the Customize screen and click the Try On button located in the upper right corner. Select the finger, and display the design. The hand model will appear in the viewport, and your design will appear on the finger selected within the diagram.

Select the gender using the drop-down menu. The band may load a little higher or lower on the finger than how one might naturally wear it. Use the Location Slider below the image of the hands to adjust the ring's position on the finger.

Next, select the closest match to your client's skin tone and nail color for a more realistic representation



of how the ring will look on her hand. Choose Flip Design to rotate the ring 180° for asymmetrical gems or designs. After you are satisfied with your selection, click OK. To revisit the menu, click the Try On icon.



After the hand is applied, continue to use the Design Stack and make real-time design adjustments on the ring. The changes take place and display automatically. At any time, rotate and zoom in and out to view the design from all angles. Use the hand to help a client visualize how high the stone will sit or how the stone size will look relative to the hand. This could help you up-sell the diamond. To deactivate the Try-On Hand, simply click Try On to re-enter the menu and choose Remove.

DOES SIZE REALLY MATTER?

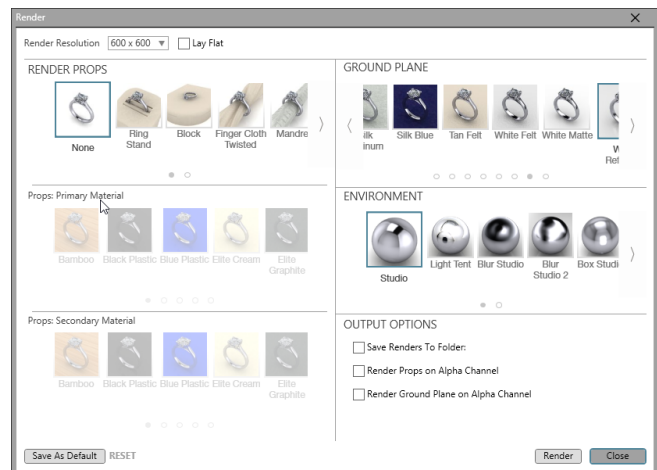
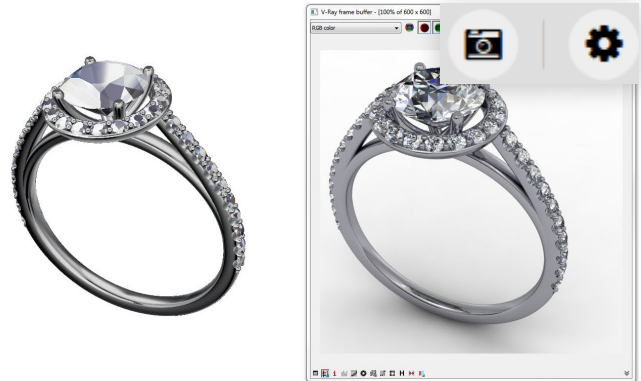
The Try On feature helps your customer understand the scale translation from a computer monitor to a live jewelry item. The client can keep a real-world perspective about the size of the diamond, how high the stone will sit off the finger, and the proportion of the ring in relation to her hand.

Measure Tool The last icon is the Measure Tool. Use this tool to get a measurement of your design in millimeters. Make sure you are in either Top View, Through Finger, or Side View when you start a measurement. Click on one side of the object you are measuring, while you drag the cursor to the other side of the object. The distance between the first location and the cursor is indicated in millimeters. Holding the Shift key while taking your measurement will snap the tool to a straight line. This can be used vertically or horizontally. Clicking the mouse again or hitting Enter will clear the tool.



Render

Although the on-screen image does a fantastic job of communicating the finished design's overall look, you can take it one step further, and Render the item with the powerful and user-friendly Render feature to create a realistic photo image to send home or email to your customer. The Render feature utilizes the latest technology offered by V-Ray and includes a wide variety of gemstone options (most are available from Stuller). The Render tool can also be used



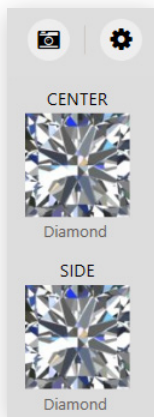
to create multiple versions of the same ring, displayed with a variety of gem and metal colors, for marketing materials or websites. Your virtual inventory possibilities are endless.

Click Render at any point during the design consultation to see the current materials rendered to your specification. The image created will directly reflect the Customize screen. Spin and zoom the design to create the composition of your choice prior to clicking Render.

Metal and Gem Material Assignment

The materials applied to the item during the Search phase of the design consultation are carried through to the Customize and Order phase. However, if you would like to review and change a material applied to an object — for example, if you need to change the rings overall appearance from platinum to white gold — look to the menu along the right side of the interface.

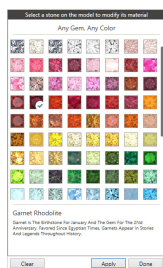
Click on the thumbnail images for Center Stones, Side Stones, Accent Stones, Primary Metal and Secondary Metal to assign a new material, similar to the method used in Search. The change is immediately reflected on the model.



Any Gem, Any Color

If the controls available do not allow you to reflect the gemstone in the material you prefer, look to the Any Gem, Any Color menu located at the bottom right of the interface.

Click Any Gem, Any Color to open a menu where you can assign materials to gems individually. The interface will change, removing the Stack controls and Render controls. A gemstone material assignment menu appears.

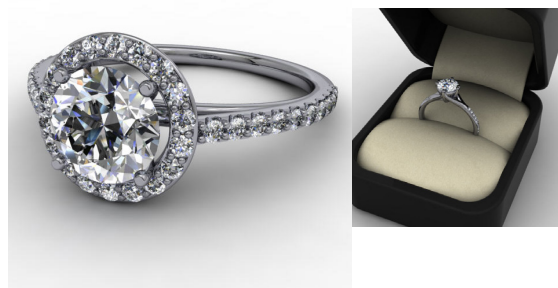


Within this interface, gemstones on the screen become active, and you have the ability to select and highlight any gemstone, isolating it from the rest of the group. To do so, hover your mouse over the gemstone you wish to change, and it will highlight. After determining the appropriate gem is highlighted, click the gem, and it will highlight darker. Continue selecting all the gems you wish to change to the same new material. Within

the Material Menu, choose the color and material you desire, and click Apply. The gemstone(s) will immediately change to reflect this color, indicating the new material has been properly applied. Continue this process until you are satisfied with your choices. If at any time you wish to revert the changes, click Clear All. Otherwise, click Done to return to the Customize screen.

Render Options

The Render Options menu empowers you to add your



personal flair to a Render. Choose the background (Ground Plane) and lighting (Environment) for the render as well as the resolution for the final image. There are even props (Render Props) such as a ring box or a jewelry pedestal to add to the composition.

Click Render Options to open the menu and set the preferences for your composition. Choose Props and apply the Primary Material and Secondary Material for the object. At its default (None), a prop will not be included in the scene. If you would like move the ring in the viewport again, please toggle Lay Flat into the Off position.

Next, choose the Ground Plane or the surface on which the jewelry item sits and what appears in the background. Ring items stand up on the Ground Plane unless the Lay Flat button is selected within Render Props.

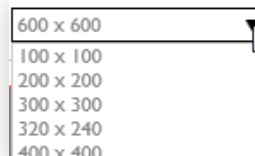
Lastly, choose the Environment. Think of a Render as a photograph and think of the Environment as the setting and lighting where the picture was taken. The overall look of the picture changes depending on these things. Light is an important factor in the overall look of the Render. Some environments have spotlights, some have windows, and others have both direct (spotlights) and indirect (windows) light sources. Experiment with different environments to find a look that appeals to your aesthetic and works best with the piece.

Set Render Position

Rotate and zoom the jewelry item to an aesthetically-pleasing position that displays the model's unique design elements. Keep in mind, Render will mirror this exact layout. If a prop is included in the Render, zoom out to include it in the scene.

Resolution

Select the Resolution from the drop-down menu list located at the top of the Render Options menu. The higher the number, the larger the render and the longer it will take for your computer and the program to create it. Larger resolutions are appropriate for large screen displays, while smaller resolutions will email better. The program defaults to 600 x 600 DPI. This size renders fairly quickly and presents well as a print-out or emailed image. Experiment and find what is best for you and the job at hand.



When you are done assigning all of the attributes, click the Render button located at the top right side of the interface or from within the Render Options menu itself. The V-Ray frame buffer menu appears, and the render is created from the top down. It may take a few minutes to fully complete the render. Take note that the process tends to slow down around the gemstones. The more stones in the piece, the longer it may take. This is because the program must work out complex geometry to manifest light-reflecting gem facets.

When the render is complete, click the Save icon, located on the top row of the V-Ray frame buffer menu. Choose the appropriate location on your computer to save the file. Type a name in the File Name text box, and select JPEG from the Save as type drop-down list. Click Save. Use any printer utility to print the render for your client.



PRINTING RENDERS

You must save the file to a location on your computer before you can print the Render. If the file was saved as a .png, the background will disappear from the image. This can be useful when using the image for appraisals or other applications.

If you find Render settings that you are particularly drawn to and wish to repeat this look and feel, you can save the settings as the default look within the Render Options menu. To do this, enter into Render Options menu and make all of your Prop, Environment, and Resolution choices. Click the Set as Default button located in the bottom left corner of the menu. The next time you click Render, these options will automatically be applied. If at any point in time you wish to remove these defaults, enter into the Render Options menu and choose Reset.

Free Advertising

Emailing or printing Renders for your customers to keep only benefits you. They'll show friends and family their future pieces of jewelry, and tell them all about the high-tech personal and custom experience they had at your store.

Ship To Account:
141833-000001

302 RUE LOUIS XIV
LAFAYETTE, LA 70508
US

Manager
Quote: training@gemvision.com
555-555-5555

ion Permissions ☐
e a password to access Preferences: ☐
n alternate Password instead of Stuller
entials:

Diamond Begin Size	to	End Size
2.95 ct	-	Above 2.95 ct
1.95 ct	-	1.95 ct
0.95 ct	-	0.95 ct
0.45 ct	-	0.45 ct

Colored Gemstone Begin Size	to	End Size
2.95 ct	-	Above 2.95 ct
1.95 ct	-	1.95 ct
0.95 ct	-	0.95 ct
0.45 ct	-	0.45 ct

COST MA

Mounting: \$100.00 x

Diamond and Gems: \$100.00 x (se

☐ Add Tax to Quick Estimate: x

Additional Markup (added to total)

Exchange Rate: US Dollars \$1.0

CHAPTER 5

Account Info & Preferences

THE COUNTERSKETCH MENU



Located in the top left corner of the interface, click the CounterSketch button to reveal many helpful utilities (located along the top of the interface in previous versions of the software). This button contains the following menus: New Session, Account Info, Preferences, Unregister, Import Design, Export

Design, Import Part, Order History, Backup, and Help. These important utilities allow you to set your markups, cater the look and feel of the CounterSketch interface to your preference, and access some fundamental utilities that will assist you in the management of your CounterSketch Users and Orders.

ACCOUNT INFO

Manage your account settings under the CounterSketch Menu located in the top left corner of the interface. After you have entered your Stuller credentials, the Account Info menu becomes accessible. Read more below for a complete breakdown of the options within this menu.

Bill To Account/Ship to Account

Bill To Account/Ship to Account displays your Bill to and Ship to account information. If your Stuller account has more than one store location, use the drop-down arrow to choose the appropriate Ship to address. In the event the account information is incorrect, please go to **Stuller.com**, and update your account information.

Custom Markup

Next, customize the markup percentage for the Mounting, Gems in Mounting, and CAM Fees within the Custom Markup category or select Use Stuller Showcase Markups. The markup percentage is used when calculating a Quick Estimate (See the Quick Estimate section for more info). Notice the Cost column is multiplied by the Markup. In turn, the Retail column reflects the client's cost equivalent. After entering the desired markups, hit the Tab key or Enter to see the Retail column update with your changes.

Mounting/Gems in Mounting: Enter the profit percentage for each of the categories. Keep in mind 100 percent of \$100 = \$100. Pay special attention to the Retail column, and double-check the Markup percentages entered, making sure they reflect the

intended total (when altering the numbers within the Markup column. Close out of the menu, and re-enter it to see the Retail Column update).

Add Tax to Quick Estimate: Click Add Tax to Quick Estimate, and enter the amount within the corresponding text box to have it included in the total. Be sure to include decimals.

Account Info	
Bill To Account: 141833-000000	Ship To Account: 141833-000001
COUNTER SKETCH TESTING 302 RUE LOUIS XIV LAFAYETTE, LA 70508 US	302 RUE LOUIS XIV LAFAYETTE, LA 70508 US

Account Manager	
Email for Quote:	Tammy_Kelly@Stuller.com
Phone:	555-555-5555
Mobile / SMS Phone:	xxx-xxx-xxxx

Application Permissions
Require a password to access Preferences: ☐

Markups			
<input type="checkbox"/> Use Stuller Showcase Markups			
Diamond			
Begin Size	to	End Size	Markup %
2.95 ct	-	Above	150 %
1.95 ct	-	2.95 ct	175 %
0.95 ct	-	1.95 ct	200 %
0.45 ct	-	0.95 ct	225 %
	-	0.45 ct	300 %
Colored Gemstone			
Begin Size	to	End Size	Markup %
2.95 ct	-	Above	175 %
1.95 ct	-	2.95 ct	200 %
0.95 ct	-	1.95 ct	225 %
0.45 ct	-	0.95 ct	250 %
	-	0.45 ct	300 %

	COST	MARKUP	RETAIL
Mounting:	\$100.00 x	300 %	= \$300.00
Diamond and Gems:	\$100.00 x	(see above)	= \$100.00
			\$400.00
<input checked="" type="checkbox"/> Include setting fees and other charges in Mounting Markup			
<input checked="" type="checkbox"/> Add Tax to Quick Estimate:	x	9 %	= \$36.00
Additional Markup (added to total)			
\$55 ReDraw FEE	+ \$	55	= \$55.00
Pain in the butt fee/Shipping	+ \$	225	= \$225.00
	+ \$	0	= \$0.00
		Grand Total:	\$716.00

Exchange Rate: US Dollars \$1.00 = \$1.00 United States Dollars

Cancel Close

Additional Markup: You are given three additional columns to add your own custom markups. Enter a short description in the text field and the dollar amount you wish to add to the total in the corresponding Markup column. Additional Markups created are automatically included in the Grand Total.

NEED A LOGIN?

The *Bill to and Ship to* sections and *Account Info* menu require your Stuller credentials. If you do not have a Stuller account, click *Need a Login?*, and sign-up for a Stuller wholesale account. Or, visit **Stuller.com** to register.

NOTE: Because the *Account Info* section allows control over the markup percentage used when calculating estimates, be sure to complete this information prior to working in CounterSketch with a customer.

Currency Exchange Rate

See the current Exchange Rate between US Dollars and your currency (selected within Preferences). Click on the underlined currency to be taken directly to Preferences > Region Settings > Currency Settings in order to change it.

Account Manager

Input the Account Manager's email and phone number here, and Stuller will automatically include them on ALL communication regarding an Order or Quote for your store (along with the User who placed the order).

PREFERENCES

The options within the Preferences menu allow you to customize the look and functionality of your CounterSketch interface to match the personality of your individual store. Locate Preferences under the

CounterSketch Menu. The Preferences menu has been divided into six separate sections: Display, Region, Theme, Update, Backup, and Troubleshooting.

Authentication required for Account Info

Enter your Stuller.com credentials below:

Username:

Password:

[Need a Login?](#)

Application Permissions

Require a password to access Preferences: The features available within the Preferences menu control the display options, regional settings, and other important utilities. An option in the Account menu allows you to lift the password protection on the entire Preferences menu. This enables all of its tabs to be accessed and modified by anyone within your store that uses CounterSketch.

Keep in mind, the Account Info menu and the proprietary information (including where your markups are determined and stored) will always remain password protected.

Once you are satisfied with your updates to the Account Info menu, click Close to save them or click Cancel to negate any changes made.

Display Region Theme Update Backup Troubleshooting

Miscellaneous Options

- After opening design, expand the first set of controls ☐
- Display Stuller Redbox Logo for Serialized Diamonds ☒
- Enable Center Stone Quarter Carat Rounding ☒
- Hide Advanced Stack Controls ☐
- Hide Quick Estimate Button ☐
- Reopen Last Portfolio Used ☐
- Toggle Large Stone And Setting Price ☒
- Keep Parts Window Open ☐

Search Results Options

- Display model number below each result ☒
- Display model number in design tooltips ☐
- Hide NEW Ribbons in Search Results ☒

Viewport Handle Scale

Animation Settings

Transition Time (seconds) 0.3

Display

The Display Options become available by clicking on the Preferences option within the CounterSketch Menu. This section gives you display options connected to the Information Bar within the program as well as display options connected with each design's model number. Access to this section of the program may require a password (depending on your settings within the Account Information section).

Miscellaneous Options

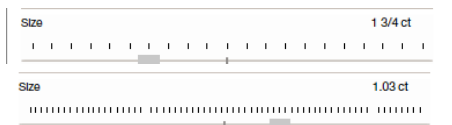
After opening a design, expand the first set of controls:

Enable this option to automatically expand the first set of the Design Stack slider controls when a file is opened. If the option is in the Off position upon opening the file, the Design Stack menu will be rolled up.

Display Stuller Red Box Logo for Diamonds: When this feature selected, the logo will appear next to the diamond you have chosen. Deselecting this feature will make the logo disappear.

Enable Center Stone Quarter Carat Rounding:

Selecting this mode allows you to change your center stone in quarter carat increments only. Deselecting this feature allows you to change your stone by hundredths of a carat.



Hide Advanced Stack Controls: Toggling this On will take away the ability to expand the control range and edit a profile when customizing a design.

Hide Quick Estimate Button: When toggled on it will hide the Quick Estimate button if you prefer this to not be part of your sales process.

Reopen Last Portfolio Used: If this option is toggled On and CounterSketch is shut down, the last Portfolio used before closing will automatically load when the program is reopened.

Toggle Large Stone and Setting Price: With this option off the Get Pricing screen will only display the complete price with it on the pricing will be broken down into large stone and setting price.

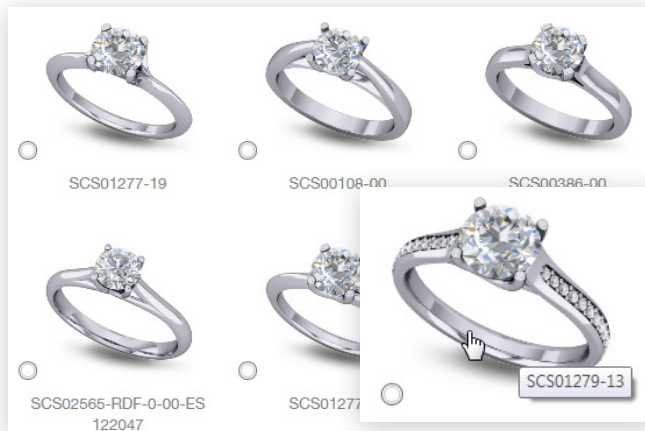
Viewport Handle Scale: Adjusts the size of the Viewport Control Handles in Freehand mode.

Animation Settings: Adjust the speed of the transitions between the Start Screen, Search and Order.

Search Results Options

Display model number below each result: places a small SKU number below each thumbnail image in the Search Showcase.

Display model number in design Tool Tips: allows model numbers to appear as a Tool Tip when your mouse is located over the thumbnail image in the Search Showcase.



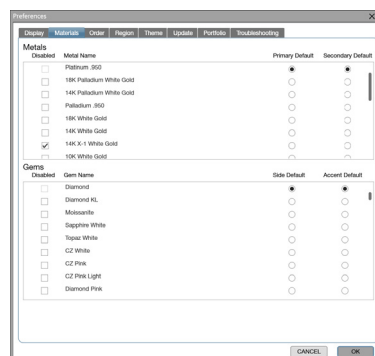
*NOTE: Each design within Countersketch is assigned a model number. If the item is stocked through Stuller, it is also assigned a Series number. Both numbers can be used within the search for products bar. If available, the Series number is located within the Design Details Section of the Search interface and can be used to locate an item on **Stuller.com**.*

Hide NEW Ribbons in Search Results: Toggles whether the blue NEW ribbon will appear on the upper left corner of new models.



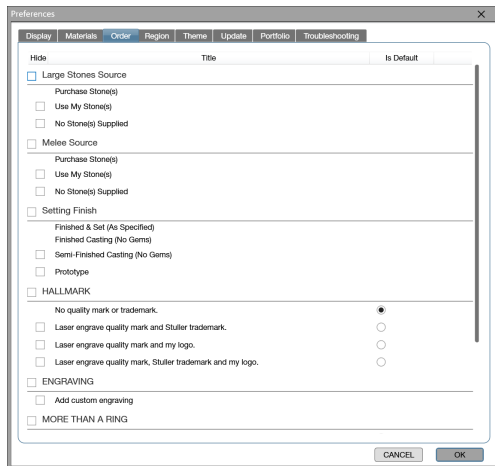
Materials

Specify the materials that will appear in the Material Chooser and the Order screen. So if you don't want to offer Sterling Silver in your store you can disable that here. If you wish to make ruby the default center stone you can do that here too.



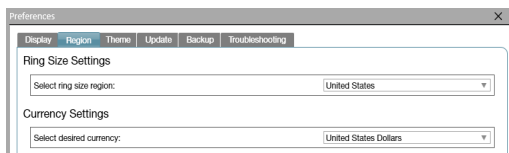
Order

Customize the options that appear on the Order Screen. You can hide options and setup your defaults from this screen. So for instance if you always want the same hallmarking you can choose a default and hide this option so it can't be changed by the sales staff.



Region Settings

The Region Settings tab customizes region-specific settings within CounterSketch.



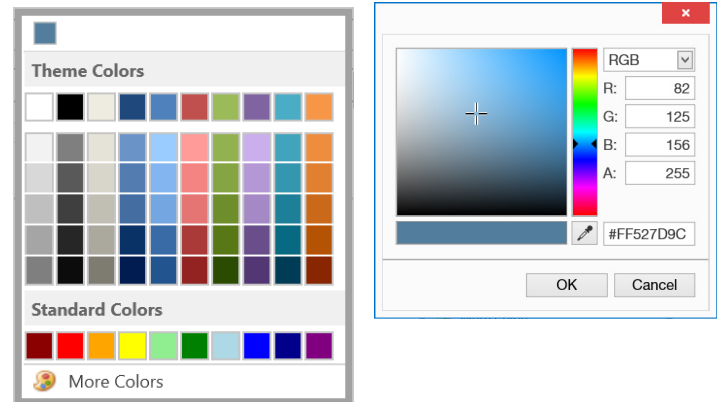
Ring Size Settings: Select the appropriate region for the ring size from the drop-down menu so that it is correct for your country when working with a customer.

Currency Settings: Be sure to select the currency for your region here, so it is appropriate during a Quick Estimate.

Theme

Customize the CounterSketch interface to reflect the special persona of your store. The Theme tab offers a wide range of options.

Custom Highlight Color: Changes the color of the icons and selections in CounterSketch. Click on the field and a color chooser will appear. Select from one of the available colors or click on more colors to create a custom color.



Viewport Background Color: Changes the background color of the viewport on the customize screen. Click on the field and a color chooser will appear. Select from one of the available colors or click on more colors to create a custom color.

Viewport Graphic: You have the option to select an Image Theme that will appear behind the models on the Customize screen. You can either have a custom background color or a Viewport Graphic not both. Click on the field and a standard file browser will appear select an included image from the folder or navigate to an image of your own.

Stretch Image: This option will ensure that your Viewport Graphic stretches to fill the viewport screen.

Reset/Reset Theme: Use these options to return each setting to its default.

Update

Customize the options that appear on the Order Screen. You can hide options and setup your defaults from this screen. So for instance if you always want the same hallmarking you can choose a default and hide this option so it can't be changed by the sales staff.

Portfolio

Portfolio Save Directory: Change the save location for your portfolios. This can be helpful if you run CounterSketch on multiple computers and would like to be able to access the portfolios from both computers from a network drive or cloud drive service.

Backup: Creates a backup of you CounterSketch portfolio and settings. It is a good idea to perform regular updates in the event that you have a computer failure. You will also want to backup CounterSketch prior to migrating to a new computer.

Restore: When migrating to a new computer restore from a previous CounterSketch backup.

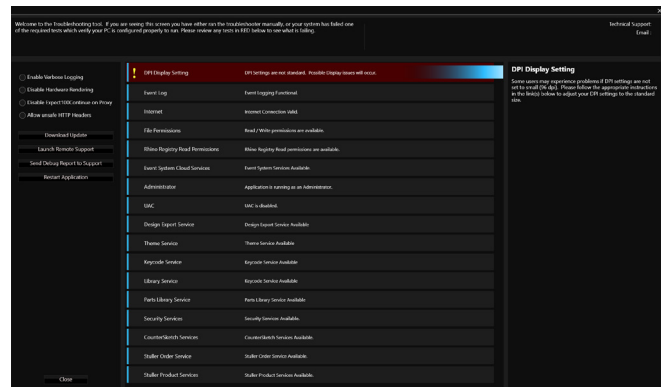
Auto Save: Auto Save will save you design at a set interval. Auto Save is not a replacement for regular saving. Designs saved using the auto save function will eventually be purged where as designs that are saved will remain until deleted by the user.

Troubleshooting

Tools you and tech support can use if you are encountering issues with CounterSketch. Go here if directed by tech support.

Show CounterSketch Log: The log file is a list of all of the actions and errors that have been executed in CounterSketch. This can help the developers and tech support team track down an issue. From the CounterSketch log screen you can copy the text to send in an email or click on send report to include the CounterSketch log in an error report. The Refresh button will regenerate the report with any additional actions/errors that have occurred since the last report was created.

Launch Troubleshooter: The troubleshooter will run some basic diagnostics of common issues that can occur that will create problems when working with CounterSketch. Any potential problem will be highlighted in red. Click on the highlighted issue and a suggested resolution will appear at the right.



Submit Debug Report: Sends a bug report to

Name

State/Region

Country

Phone 2

type	shape	details	carat	quant
Diamond	Round	---	1.03	1

Source

Serialized Diamond? ☒

Finished & Set (As Specified)

Ring 7

Primary metal

Secondary metal

Model Number SCS02009-RDF-0-00-EG

type	shape	details	carat
---	Round	(N) Natural	0.28

G+ VS

CHAPTER 6

Order



SETTING UP YOUR ORDER

You have helped your customer select and customize her dream design. Now send the information to Stuller, and close your CounterSketch sale. Export the design for in-house manufacturing.

Order Your Designs From Stuller

Place an Order directly with Stuller from the CounterSketch interface. Specify the metal alloy and desired level of finish. Choose from a Prototype, Semi-Finished Casting, Finished Casting, or Finished and Set Casting. Order gems from Stuller, or use your own gems to complete the design. You even have the option to hallmark your design and add custom engraving with or without a fill color. If you meet the Exact Price qualifications, you will get your price on the spot. If you have made custom changes to your design. Stuller will email you a Quote Notification once your order is processed. Upon approval, your job will typically be

COUNTER SKETCH

studio

Reference

CUSTOMER INFORMATION

Title

First Name

Mi

Last Name

Suffix

Address

Address

City

State/Region

Postal Code

Country

Phone 1

Phone 2

E-mail

LARGE STONES

Not Assigned

type	shape	details	carat	quantity
Diamond Pink	Round	6.50 x 6.50	1.03	1

Source

Purchase Stone

Quality SI

SETTING

Finish

Finished & Set (As Specified)

primary metal

weight

Component(s)

Ring

Platinum .950

2.80 DWT (1.80 g)

Ring Size

7

Model Number

SCS01277-19

HALLMARK

☒ No quality mark or trademark.
☐ Laser engrave quality mark and Stuller trademark.
☐ Laser engrave quality mark and my logo.
☐ Laser engrave quality mark, Stuller trademark and my logo.

ENGRAVING

☐ Add custom engraving limited to 13 characters

ENGAGEMENT RING

☐ This is a matching band to a previous engagement ring.

PRINT 3D SAMPLE

Get Pricing

completed in eight days or less. Extra modifications and specialized setting of customer gems may extend the time frame required for manufacturing.

QUICK ESTIMATE

When it's time for you and your customer to address cost and are ready for an estimate, look for the calculator icon displayed in the bottom-right corner of the interface while working in Customize, Freehand and Order. Quick Estimate will display the pricing information for all designs in CounterSketch's virtual inventory based on the current price of metals in the market that day. Note that you will need an active connection to the internet to retrieve this information. Also keep in mind that any gem 4mm or larger on the piece will not be included in the estimate due to dramatic price fluctuations inherent between gems of this size. In CounterSketch, gemstones of this size are considered Large Gems and all smaller gems are considered Accent Gems. Be sure to visit Account Info under the



Quick Estimate						
Design: SCS02504-RDF-0-00-ES	Date: 3/29/2016 3:11:21 PM					
	Weights	G+ VS	G-H SI1	G-H SI2-3	I-J11	Mounting Only
Platinum .950	4.43 DWT (6.89 g)	\$5,038.44	\$4,753.09	\$4,450.09	\$3,787.63	\$2,152.33
18K Palladium White Gold	3.46 DWT (5.37 g)	\$4,445.17	\$4,159.82	\$3,856.82	\$3,194.36	\$1,559.06
14K Palladium White Gold	3.18 DWT (4.94 g)	\$4,115.70	\$3,830.35	\$3,527.35	\$2,864.90	\$1,229.60
Palladium .950	2.74 DWT (4.26 g)	\$3,975.55	\$3,690.20	\$3,387.19	\$2,724.74	\$1,089.44
18K White Gold	3.40 DWT (5.29 g)	\$4,429.43	\$4,144.08	\$3,841.08	\$3,178.63	\$1,543.32
14K White Gold	2.78 DWT (4.33 g)	\$4,028.50	\$3,743.15	\$3,440.15	\$2,777.69	\$1,142.39
14K X-1 White Gold	2.78 DWT (4.33 g)	\$3,998.99	\$3,713.64	\$3,410.64	\$2,748.18	\$1,112.88
10K White Gold	2.43 DWT (3.77 g)	\$3,817.46	\$3,532.11	\$3,229.10	\$2,566.65	\$931.35
Continuum Sterling Silver	2.30 DWT (3.57 g)	\$3,573.61	\$3,288.26	\$2,985.26	\$2,322.81	\$687.51
22K Yellow Gold	3.95 DWT (6.14 g)	\$4,819.53	\$4,534.18	\$4,231.18	\$3,568.72	\$1,933.42
18K Yellow Gold	3.40 DWT (5.29 g)	\$4,397.18	\$4,111.83	\$3,808.83	\$3,146.38	\$1,511.07
14K Yellow Gold	2.84 DWT (4.42 g)	\$4,009.83	\$3,724.48	\$3,421.47	\$2,759.02	\$1,123.72
10K Yellow Gold	2.53 DWT (3.93 g)	\$3,801.91	\$3,516.56	\$3,213.56	\$2,551.10	\$915.80
Accent Gems Included in Estimate						
Count: 13	Weight: 0.4641		Large Gems NOT Included in Estimate			
				Count: 1	Weight: 1.0309	

CounterSketch Menu (CounterSketch icon located in the top-left corner) to enter your markups prior to giving an estimate.

With the chosen ring design displayed on the Customize screen, click on Quick Estimate located in the bottom-right corner (calculator icon).

Soon the Quick Estimate menu will expand, displaying a breakdown of the metals their cost as the mounting, and their corresponding weight. Also displayed is a range of three different melee grade costs (if applicable). At the bottom of the menu the Accent Gems included in Estimate and Large Gems NOT included in Estimate are both broken down by weight and count. As stated before, Large Gems are stones 4mm or larger. Smaller stones are considered Accent Gems.

NOTE: All gem weights are calculated as ideal cut diamonds. Pay attention to which gems are included and excluded in the Quick Estimate by looking at the bottom of the menu.

You can edit which metals appear in Quick Estimate by clicking on the gear in the upper right-hand corner of the window. Uncheck any alloys or gemstones you don't wish to offer.

Quick Estimate						
Design: SCS02504-PDF-0-00-ES		Date: 3/29/2016 3:11:21 PM		Save		
	Weights	G+ VS	G-H SI1	G-H SI2-3	I-J I1	Mounting Only
<input checked="" type="checkbox"/> Platinum .950	4.43 DWT (6.89 g)	\$5,038.44	\$4,753.09	\$4,450.09	\$3,787.63	\$2,152.33
<input checked="" type="checkbox"/> 18K Palladium White Gold	3.46 DWT (5.37 g)	\$4,445.17	\$4,159.82	\$3,856.82	\$3,194.36	\$1,559.06
<input type="checkbox"/> 14K Palladium White Gold	3.18 DWT (4.94 g)	\$4,115.70	\$3,830.35	\$3,527.35	\$2,864.90	\$1,229.80
<input checked="" type="checkbox"/> Palladium .950	2.74 DWT (4.26 g)	\$3,975.55	\$3,690.20	\$3,387.19	\$2,724.74	\$1,089.44
<input checked="" type="checkbox"/> 18K White Gold	3.40 DWT (5.29 g)	\$4,429.43	\$4,144.08	\$3,841.08	\$3,178.63	\$1,543.32
<input checked="" type="checkbox"/> 14K White Gold	2.78 DWT (4.33 g)	\$4,028.50	\$3,743.15	\$3,440.15	\$2,777.69	\$1,142.39
<input type="checkbox"/> 14K X-1 White Gold	2.78 DWT (4.33 g)	\$3,998.99	\$3,713.64	\$3,410.64	\$2,748.18	\$1,112.88
<input checked="" type="checkbox"/> 10K White Gold	2.43 DWT (3.77 g)	\$3,817.46	\$3,532.11	\$3,229.10	\$2,566.65	\$931.35
<input type="checkbox"/> Continuum Sterling Silver	2.30 DWT (3.57 g)	\$3,573.61	\$3,288.26	\$2,985.26	\$2,322.81	\$687.51
<input checked="" type="checkbox"/> 22K Yellow Gold	3.95 DWT (6.14 g)	\$4,819.53	\$4,534.18	\$4,231.18	\$3,568.72	\$1,933.42
<input checked="" type="checkbox"/> 18K Yellow Gold	3.40 DWT (5.29 g)	\$4,397.18	\$4,111.83	\$3,808.83	\$3,146.38	\$1,511.07
<input checked="" type="checkbox"/> 14K Yellow Gold	2.84 DWT (4.42 g)	\$4,009.83	\$3,724.48	\$3,421.47	\$2,759.02	\$1,123.72
<input type="checkbox"/> 10K Yellow Gold	2.53 DWT (3.93 g)	\$3,801.91	\$3,516.56	\$3,213.56	\$2,551.10	\$915.80
Accent Gems Included in Estimate						
Count: 13		Weight: 0.4641		Large Gems NOT Included in Estimate		
				Count: 1		
				Weight: 1.0309		

PLACING AN ORDER

Account Info

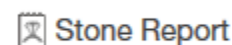
If the account information is already entered in Account Info, you are ready to place an Order. For more information on Account Info, refer to the Account Info and Preferences chapter.

USER TIP

If you want more than one person to have visibility on all orders, it may be wise to use a distribution email address or an email address where all CounterSketch users can access the correspondence.

You can print the Quick Estimate by clicking on the printer icon in the upper right-hand corner.

The stone report button directly below quick estimate will provide a report of the number and size of gemstones in your design.



Shape	Type	Height	Width	Depth	Carat	Quantity
Round	Diamond	1.30	1.30	0.81	0.31	38
Round	Diamond	1.75	1.75	1.09	0.04	2
Round	Diamond	7.40	7.40	4.58	1.51	1
Center Gem:					Weight	Quantity
Total Carat Weight:					1.51 ct	1
					1.86 CTW	41



This is the point in time to proceed in closing the sale! In the event the mounting is still out of the customer's price range, try making a few adjustments to bring the cost down in price. Would they opt for a lower karat in the same metal or be happy with a different metal type altogether- maybe White Gold instead of Platinum? If these are not viable options, consider decreasing the gem size or quality, decreasing the width of the shank or try hollowing the design. For some tips on how to hollow a ring, refer to the Customize chapter and see the section on Editing Profiles. Upon closing the sale, your next step is ordering the item from within the CounterSketch interface.

NOTE: When communicating, or if there are any questions about your order, Stuller will contact the User who placed the order and copy the Account Manager on ALL correspondence.

Customer Info

Fill out the customer information as needed. It is recommended to complete all of the customer information in its entirety. However, only the customer's first and last names are required to place an order.

LARGE STONES

type	shape	details	carat	quantity
Diamond	Round	---	1.03	1

Source
Purchase Stone
Serialized Diamond? ☒

Shop for Stone
Stone Tray

Large Stones

Now, you can shop for your large stones from Stuller’s Red Box Diamonds®, or you can choose something you have saved in your tray.

If you are searching for a stone during the order process, the size and shape will already be chosen for you. You will then discuss clarity, cut, and color with the customer to see if they have specifications about what they would like. You will be able to choose the Diamond Grading Report, and the customer can decide if they would like a gem of Canadian origin. At the bottom of the screen, you will be able to type in a budget for the stone.

NOTE: It is suggested that the fields not be narrowed too far, otherwise, there may be no search results. If the customer is not picky about the clarity, cut, or color, you may not need to limit those search results if the budget is narrow.

If you and your customer have shopped for stones previously and put them in the Stone Tray, now is the time to click on Tray and add these gems to your design. Simply click on the Stone Tray, and double click to choose your stone.

If you are not choosing a stone from Stuller’s Red Box Diamonds, click on Source and choose either Use My Stone or No Stone Supplied.

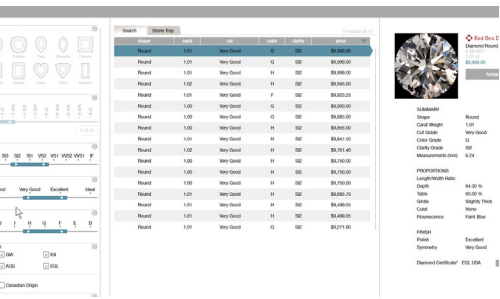
Use My Stone: For this option, you will send your gem(s) to Stuller and have Stuller set the gem(s) for you.

Enter the value of the supplied stone. The value is used to determine the setting charge and insurance value declared when shipping the item to your store.

No stone supplied: This option needs little explanation. In this instance, you or your jeweler will be setting the stone. Take special care to verify the Height, Width, and Depth fields to ensure your gemstone fits the manufactured mounting snugly and correctly.

Red Box Diamonds®: Deselecting this allows you to choose the color and clarity range of the stone but not the specific stone that will be used.

NOTE: Only gems available through Stuller.com are listed. However, it is possible that a particular size is not available. If so, a Stuller CAM Services representative will contact you to find out how to proceed with the Order.



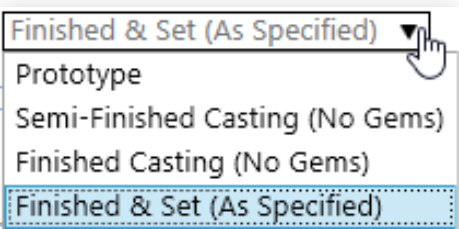
Finishing

Next, choose the level of finish you desire. Prototypes allow you to build collections within your store without the costly overhead of precious metals and gemstones. Prototypes are a great tool for helping the customer visualize and make design decisions during a consultation.

Semi-Finished Casing (No Gems) provides you with a raw casting with no gems supplied or set.

Finished Casting (No Gems) returns a polished mount with no gems supplied or set.

Finished & Set Casting (As Specified) returns a fully polished and set mount ready to hand to your customer.



Mounting

Ring Size: Review the Ring Size information. If you need to change the information, simply return to Customize, make the change to the model, and return to the Order screen.

Metal: Review the Primary Metal and Secondary Metal materials applied to the design. If you would like to alter your metal choice or alloy, you can do so from the Material drop-down in Order.

Hallmarking

In addition to the options above, CounterSketch also allows you to add a hallmark to further personalize and brand your custom design. Opt to mark the design with the quality (for example 14kt, and/or the Stuller logo, and/or your own logo). Or choose a combination of any of the three options.

Engraving

Add Custom Engraving is typically used to personalize the item for your customer. Select this to see its options. Enter your customer's special message (limited to 13 characters) into the text box. Next, choose the desired font style and font size. Choose from Bookman Old Style, Colonna MT, Edwardian Script ITC, Old English Text MT, Script MT Bold, or Lucida Handwriting. The selections made in the drop-down menu will update immediately.

Select Fill Color to add color to the engraving. Choose from black, blue, brown, green, pink, or red. If no fill color is desired, leave the Fill Color option unselected.

Engagement Rings

If the order is a matching band for an engagement ring that has been previously produced, be sure to select this option to ensure the two bands correctly match each other. Stuller's CAM department strongly recommends sending the engagement ring along with the order to ensure your satisfaction. Check whether or not you agree or choose not to send in the ring. If the latter is the case, check the box stating that you understand that Stuller cannot guarantee a perfect match without the ring as a guide.

Additional Design Notes

Additional Design Notes are to communicate any special instructions you wish to relay to Stuller about the order. Use Additional Design Notes to request any changes to the model required by the customer that you were not able to achieve in CounterSketch. Any request will need to be reviewed and quoted by Stuller CAM services. Click on the button, and type the full instructions into the text box.

USER TIP

Adding Additional Design Notes can delay the time the Order Quote is processed up to 72 hours.

More Than A Ring

You've taken the time to get to know your customer and design a ring they will love. Set your store apart from others by delivering *More Than a Ring*. This look book details the journey of your customer's ring from its beginning as a CAD design, to the wax model, then the raw casting, and finally... the finished piece, in all its glory. Sure to be a cherished possession, the book has a place for a photo of the newly-engaged couple and a holder for your business card. Give the gift that tells the story of how a couple's engagement mirrors the journey of their love with this beautiful keepsake. Click View Book Example to help visualize the finished book.

If you choose to opt out of the *More Than A Ring* Book, but would still like a fantastic keepsake, click on Digital Images Only. You will receive a link to digital images of the design process for the custom created piece.



SUBMITTING YOUR ORDER

Use the Get Pricing button when all the information has been entered and the order is ready to process.

Depending on how much customization was done (extending sliders, having additional notes, using Freehand parts, or a user supplied stone), you may be eligible to get an Exact Price. You will see the exact price and be able to order without having to wait for a quote. Simply enter your (the jeweler's) first and last name, and click Place Final Order. If your order does not include a stone supplied by Stuller, nothing will appear in the Large Stone(s) pricing area.

If during the customization process you extended slider ranges, included additional notes, added Freehand parts (only available in Studio version), or are supplying your own stone, you will be required

to go through a quote process. A quote will appear on the screen, and you will be contacted by Stuller in 1-3 days with an exact price for your design.

All of this allows you to keep your markups set and help your customer get the design of her dreams by choosing a stone or material that is within their price range.

If you own a ProJet 1200 from Stuller, you have the option to print a 3D model for your customer to try on. Simple click Print 3D Sample. Directions will pop up directing you how to proceed. If you click on the button and you do not own a ProJet, it will ask you to purchase a ProJet and also give you the option to turn this feature off.

The 'Get Pricing' window displays 'EXACT PRICING ELIGIBILITY' with four checked items: 'No extended slider ranges', 'No Additional Notes', 'No Freehand Parts', and 'No User Supplied Stones'. A congratulatory message states: 'Congratulations! Clicking Place Final Order will place the order at the price displayed.' The design details include Model: SCS01277-19, Size: 7, and a 3D model of a ring. Pricing information shows: Large Stone(s) : \$9,999.00, Design total carat weight: 1.01 CTW, Setting : \$1,578.09, and Total Price : \$11,577.09. At the bottom, there are input fields for Buyer and Designer, and buttons for Cancel, Place Final Order, and a small 'EXACT' logo.

The 'Get Pricing' window displays 'EXACT PRICING ELIGIBILITY' with the same four checked items as the previous window. A 'Quote Required' message states: 'Click Request Quote and your job will be carefully reviewed to ensure accurate pricing and you will receive your final quote in 1-3 business days.' The design details are identical: Model: SCS01277-19, Size: 7, and a 3D model of a ring. Pricing information shows: Large Stone(s) : \$9,999.00, Design total carat weight: 1.01 CTW, Setting : \$1,645.05, and Total Price : \$11,644.05. At the bottom, there are input fields for Buyer and Designer, and buttons for Cancel and Request Quote.

ORDER HISTORY

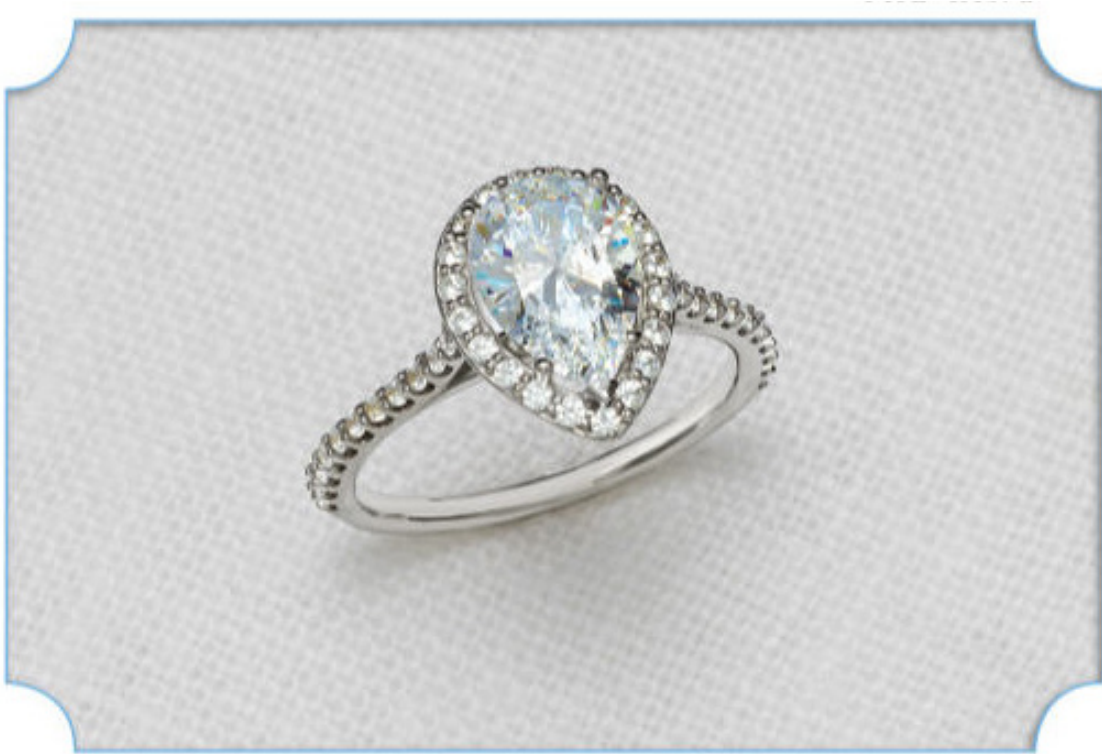
After submitting the Order, it is automatically logged into the Order History portion of the program (found under the CounterSketch menu).

Each Order tracks the User, as well as the date and time the Order was submitted.

Revisit any design documented in the Order History menu by double-clicking on the corresponding thumbnail image. The design will load onto the Customize screen. If you would like to see any order details, simply revisit the Order tab while the item is open on the Customize screen. This is a simple way to review any customer information or manufacturing details of an item you ordered within CounterSketch.

Conveniently displayed separately within Order History, there is also a Prototype Orders tab that displays all of your prototype orders for easy reference.

The 'Order History' window displays a list of three orders. Each order entry includes a thumbnail image, a 'User' field, a 'Date' field, and a 'Show Details' button. The first order (200140) is dated 10/8/2015 11:13:06 AM. The second order (200141) is dated 10/8/2015 11:16:19 AM. The third order (200142) is dated 10/8/2015 11:39:12 AM. Each entry also has a 'Customer Information' section with fields for Email, Phone, and Notes, and a 'Reference #' field.



CHAPTER **7**

Deliver



FROM STULLER TO YOU

CounterSketch delivers custom designs and higher profits to your store with quick turnaround times. Rely on Stuller to take the guesswork and overhead expense out of manufacturing. With Stuller reliability, you get exactly what you need, on time, every time.

QUOTE CONFIRMATION

Within a few minutes, a confirmation email is sent to the CounterSketch User's email address supplied during the Order process. The Account Manager assigned in the Account Info section of the interface will automatically be copied on this correspondence. To assign the Account Manager information, look in the CounterSketch Menu, and choose Account Info.

File Validation

Once Stuller receives the file, the first step is file validation. Stuller does this to be sure there are no subsequent problems during the manufacturing process. During the validation process, Stuller may make a few changes to some of the parameters to ensure manufacturing ease. Changes made may include increasing the prong size, increasing the thickness of channel rails, or lengthening the prongs for setting purposes. All of the changes will result in an item which aesthetically matches the item you ordered while also meeting necessary manufacturing requirements for strength.

STULLER CAM SERVICES

Creates a 3D virtual computer file of your design that Stuller will use to produce the item, transforming the model into reality in 10 days or less.

If the item cannot be customized to meet your exact design needs, and you have included Additional Design Notes with special requests for the model, Stuller will try to work with you to solve the design dilemma.

The model validation process happens within one business day of placing the order (please allow up to 72 hours if Additional Design Notes are included).

Approving and Tracking Orders

Visit **Stuller.com** to view and track all of your submitted orders.

Stuller.com


Log in to your account using your Stuller credentials. Click Customization located at the top of the site, and select CAD/CAM Services.

The CAD/CAM Services section of the website is comprised of four tabs: Home, New Request, View Requests, and Edit Profile. These different areas of the site are used to approve and manage all aspects of your CounterSketch jobs and any additional CAD/CAM Services jobs that are in process.

Updating Your Stuller Account

Manage your account information through the Edit Profile tab. Here your name, phone number, email address, and account information can be reviewed. If you enable the Yes, email me status updates, you will receive email status updates notifying you which steps of the manufacturing process are complete. You can also track the progress of your job step by step. The status updates are as follows: Request Received/Validating File, Quoted (Awaiting Approval), Quote Accepted, Order Placed, Fabrication-Wax/Resin, Production-Spruing/Casting, Production-Clip and Ship/Semi Polished, Production-Polished/Setting, Memo Review, and Shipped.



Home	New Request	View Requests	Edit Profile
Search 			
Reference #		Customer Reference	
47065			

If you do not opt for email verification, you will only receive the Quote Notification and an email indicating when the item has Shipped.

Tracking Your Jobs

Click on the View Requests tab to manage and track a job through the entire manufacturing process. If you have multiple jobs in process, you can view each individual job at a glance. The Customer Reference, Status and Request Date of each job are displayed.

To view specific information pertaining to a job, click Details (located on the far right). If the status of a job is currently set to Quoted (Awaiting Approval), the itemized cost will display, and you will have the option to Accept the quote or Cancel the job. After accepting the job, click Submit to begin the manufacturing process.

Submitting Gemstones

If you chose Use My Stone(s) when using the Order function within CounterSketch, print and include the Stuller Stone Submission Form for Customer-Owned Stones you are submitting to Stuller to set. This form will require you to provide information about the gemstones you will be shipping to Stuller including the quantity of gemstones, type of gems, size, quality, and declared value. You will also receive the Terms of Service Agreement. Please read this information

carefully and include the signed agreement with the shipment of gemstones. The address for where to ship your gems is included on the submission form.

Once received, your gemstones will go through a quality assurance verification process to ensure the gem descriptions match the actual quantity, quality, size, and value declared on the submission form. The gemstones will be paired with your order, and Stuller will verify the gems will fit securely within the constraints of the design.

NOTE: Stuller is not liable for stone breakage.

STULLER'S PROCESS

When a new request and CAD file is received, it's added to the queue so that its progress can be monitored.

The CAD file is validated to be sure there will be no production problems, and a cost estimate is sent to the customer. If approved, the file moves to fabrication. Exact Price orders skip the quoting and approval steps.

A model will be produced using a variety of 3D printing technologies or by computer-aided milling (whichever is most appropriate for that specific design).

Once cast, the new piece of custom jewelry is polished and set, and the finished jewelry is shipped to the customer.

If your customer chose the More than a Ring option, the entire process is documented for the memory book, which will arrive along with the finished design.

THE CAM PROCESS

Among other factors, CAM pricing is dependent upon the number of parts, or separate cast pieces necessary in the production process (Ex: A two-tone piece vs. a piece consisting of only one metal type). Once the prototype is created, the item is cleaned, and a sprue is added for casting. After it is cast, the model will enter the finishing stage.

Next, Stuller will finish the item to the degree of completion you requested during the Order process.

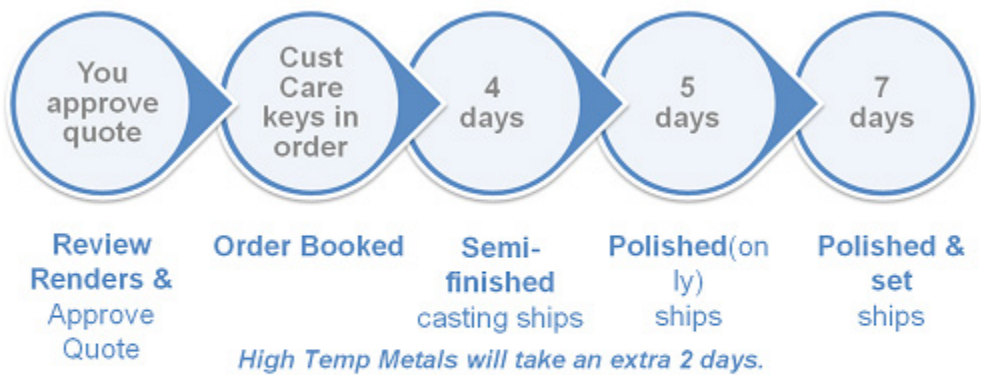


Whether it is a gemstone you supplied or a gem you ordered directly from Stuller, our master stone setters will take great care during this process.

NOTE: All time frames are calculated Monday-Friday 9:00 a.m.-5:00 p.m. Central time. Please allow extra time if submitting gemstones.

When the manufacturing process is complete, the item is shipped to the location provided in the Account Info section of CounterSketch.

.....
DELIVERY
Expect delivery of your custom design in seven to nine business days after you approve your project (for US orders).
.....



*Count only Stuller working days,
(Monday through Friday, excluding holidays.)*

.....
TURNAROUND TIME
Our goal is to have your Order quoted within one day of receiving the request during normal business hours (Monday-Friday 9:00 a.m. to 5:00 p.m. Central time).

Adding special requests and notes can delay the time the Order Quote is processed up to three to five business days.

Manufacturing turnaround times are dependent on the level of finish desired and will begin the day after you approve the project. All times are in business days.

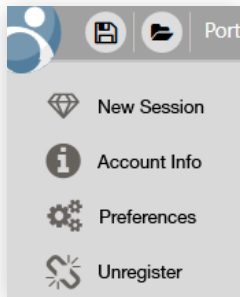
- Semi-Finished Casting (clip and tumble) 4 days*
 - Finished Casting (polished) 5 days*
 - Finished & Set Casting 7-10 days*
-



CHAPTER 8

Help & Resources

UTILITIES



Located in the top left corner of the interface, click the CounterSketch icon to reveal many helpful utilities. Although most of the items within this menu have been covered in previous chapters, there are a few helpful ones to be discussed in this chapter.

License Transfer

Want to spend some time learning and practicing CounterSketch after business hours? Need to prepare for an upcoming design consultation and wish you could work from your home PC? Unregister your CounterSketch license quickly and easily to transfer the license from one computer to another as often as you like. Follow these simple steps and walk the path to CounterSketch freedom.

Install CounterSketch onto the desired computer(s) using your original CounterSketch installer. Details for the install process are included on the installation USB. In order to move your license to a new machine, you will first need to unregister the old computer. To do this, go to the CounterSketch Menu> Unregister. Read the dialog that appears. Clicking Yes will unregister the machine and automatically close CounterSketch. Now you are ready to move your license.

When opening CounterSketch on the new computer you will receive a prompt to enter your 16-digit license key, **Stuller.com** login, and **Stuller.com** password, so remember to have this information available. The first time you open CounterSketch on the new machine you will be prompted to set up your Account Information again, including your Markups. Enter your information in the appropriate fields, and you're ready to go.

A dialog box titled 'There was an error validating your Serial Code.' It contains a text area for 'Enter your Stuller.com credentials and Serial Code below:' and three input fields: 'Username:', 'Password:', and 'Serial Code:'. At the bottom, there is a red link 'Need a Login?', a 'Cancel' button, and a 'Login' button.

LICENSE TRANSFER CHECKLIST

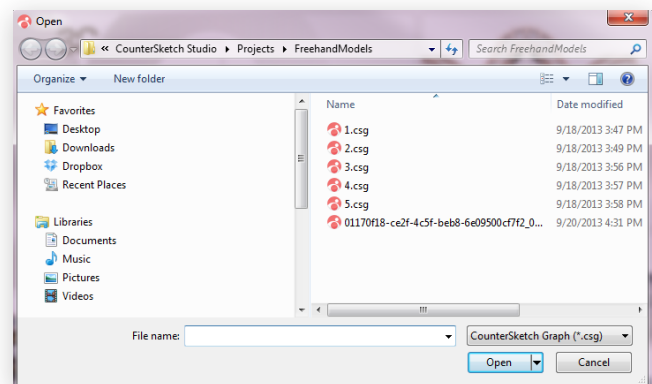
- *CounterSketch USB*
- *16 digit license key (Your 16 digit code appears on the back of your white CounterSketch box).*
- *Stuller.com login*
- *Stuller.com password*

NOTE: CounterSketch will only be usable on one computer per license at a time and will always need to be unregistered from the first computer before you are able to use it on the new machine. Don't forget to unregister before leaving work if you plan on using the program at home or vice versa.

Import/Export

In the event you contact Technical Support and need to send them a file or you need to load a file into CounterSketch that was sent to you, use the Import/Export Design feature located within the CounterSketch Menu.

Load a .csg file into CounterSketch by clicking Import. Browse the location on your computer where the file is saved and click Open. Take note, importing a file will override any file that is currently active on the Customize screen. If you wish to save this file, be sure to Save the active design prior to using the Import function.



Any design that is currently loaded onto the Customize screen can be exported and saved to your computer. To do so, choose the Export option. A new window will appear. Navigate to the location on your computer where you would like to store the file. In the File Name box, enter the desired name and click Save. The file is now saved with a .csg file extension.

Update

The Update tab provides easy methods for keeping the software current. Update Settings are located within the CounterSketch Menu>Preferences>Update Settings.

CounterSketch Application Update Mode

The CounterSketch Application Update Mode has two different options: Automatic and Manual. CounterSketch makes use of a Microsoft Technology known as Background Intelligent Transfer Service (BITS), to download all of its updates. This same technology is used to update Windows and to transfer files within Live/MSN Messenger clients.

BITS uses bandwidth that is not currently being used by your computer to transfer the data. When an update is downloaded, BITS works in the background outside of the CounterSketch environment. Begin an update within CounterSketch, and it will continue until the transfer is complete, even if you close the CounterSketch program. If you surf the web, BITS will automatically reduce its bandwidth usage related to the CounterSketch update accordingly, so you will not even notice your computer is working on the update.

BITS only works on Windows platforms and requires the user to have the BITS service enabled. Your computer should already have this function enabled by default.

Automatic: The Automatic option will routinely check if an update is available without you having to prompt the program to do so. If one is available, a green Software Update Available button will appear in the status bar (below the Customize screen). Simply click on it every time you see it to keep the program current. This is the setting that we highly recommend.

***NOTE:** While downloading an update, a small green spinning circle will animate in the bottom-right corner of the interface.*

Manual: If you would prefer to control when the Software Update Available button appears, select

the Manual option. When the Update All button changes from being grayed-out to being active, an update is available. Click on it to download the newest version. Once complete, the Software Update Available button will appear (as stated previously in Automatic).



Under the CounterSketch Application Update Mode section, the Version you are working with and the Latest Version available are both displayed here.

Backup Settings and Restore

In the event of hard drive failure or computer problems, you can restore your CounterSketch files onto another computer with no loss of data by creating a copy or backup of CounterSketch. Give yourself peace of mind and get in the habit of creating regular Backups.

The Backup feature will save your Order History, Catalog History (available only in Pro and Studio), Preferences, and Customer Portfolios (Including your customer's personal information) — Basically everything of importance.

To perform a manual backup, navigate to the CounterSketch Menu. Choose Backup> Backup Settings. Depending on your Account Info settings, you may be prompted to enter your password.

Click 'Browse' to choose where you would like to store the backup file within the Backup Directory Location text field. Save to an external location instead of your hard drive. Select the folder you wish to save your data in, or click Make New Folder to create a new one. Name the new folder, and click OK. Next, click on Create Backup. Beneath the Backup Log, you will see the progress. This backup information takes up a lot of hard drive space. We advise that you only keep the most recent two or three backups and delete the rest in order to save space on your computer.

In the future, click Backup from within the CounterSketch Menu, choose the Backup sub option, and CounterSketch will automatically send the data to this location. At any time, you may change the destination by clicking Browse and specifying a new location or folder. Clicking Reset will clear the text field entirely.

BACKUP

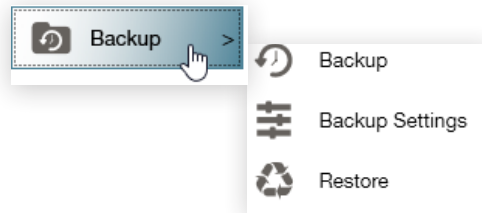
Backup is just a way to access the Backup feature without entering the Preferences menu. Access it quickly and easily by going to the CounterSketch Menu > Backup> Backup. The Backup will automatically be saved to your predefined location.

NOTE: Performing a Backup or a Quick Backup can take 8-10 minutes or longer depending on your computer's processor speed. Plan ahead and perform them when your computer is not in use.

Restore

After creating a Backup, the Restore feature can be used. Use this button if you ever need to Restore the program to the point in time when the last Backup was conducted. Click Browse to navigate to the folder where you previously created your CounterSketch data

Backup. Once selected, click Restore. As an added safety net, CounterSketch will ask if you want to perform a backup of the current CounterSketch data before performing the Restore.



NOTE: Using the Restore feature to restore from a previous Backup point can potentially DELETE projects that were created after the date of the restored backup. Please use caution and ONLY use Restore when absolutely necessary. Also be advised, the Restore process may take a long time depending on the size and amount of Portfolios being restored.

HELP MENU

Within the CounterSketch menu, choose Help to view all of the resources available to you as a CounterSketch member. If you have questions on how to become a member or what these member benefits are, contact Gemvision for more information.

User Guide

A digital copy of the CounterSketch User Guide is available online and can also be accessed within the CounterSketch program under Help (The first option in the list is User Guide). Choose this option to launch the Internet, and view the guide.

USER GUIDE

The User Guide is hosted online, therefore, an Internet connection is required to view the file. If you wish to view the file offline, simply save the file to a location on your computer's hard drive. Take note, the file can change at any point in time, so it is recommended to view the file from the online location.

Show CounterSketch Log: If you are working with our Technical Support team to solve an issue, you may be asked to select this button and possibly send this information to us. Also access this tab without needing to enter Preferences, through CounterSketch Menu > Help > Troubleshooting (Be sure to check out the other invaluable resources available to you under the Help tab. See the Help & Resources section for more information).

Launch Troubleshooter: If any menu areas on the left appear in red when launched, it can give our support team valuable clues to the cause of your issues. From within this menu, Technical Support may request you to engage further options if necessary. This screen may launch automatically if certain issues arise. If this happens, contact Technical Support.

Where to get Help: If you receive an error message, pay attention to the sequence of buttons you pushed, the tab you are in, etc. This information will help our programmers when they are trying to solve software issues and bugs. Write this information in the text field, and click Submit Debug Report. CounterSketch will send your comment along with important data to help resolve your issue. Our Support contact information appears below. Be sure to contact them if you encounter any problems.

Troubleshooting

If you are receiving error message pop-ups or having any other issues, our Technical Support team may ask that you enter the Troubleshooting tab.

TRAINING

Train At Stuller

In this hands-on, three-day class, you will learn everything you need to know to make CounterSketch successful in your store. Discover how to use it with customers and provide them with extensive manufacturing options from Stuller. You will also be introduced to additional Stuller solutions, such as the ProJet® 1200 3D printer and Ever&Ever™ bridal prototypes that can take the CounterSketch experience to the next level.

While at Stuller's manufacturing plant and headquarters, where we do all of our casting, setting, and finishing, you'll also have the chance to meet up with our customization specialists, including the Gemvision technical support team and members of our CAD/CAM Services department.

For details on CounterSketch training opportunities, visit **Stuller.com/CounterSketchTraining**.

Train Online

CounterSketch Online Training consists of 14 extensive training modules with videos and interactive exercises. Designed to supplement training at Stuller, online training makes it easier and more convenient than ever to hone your skills and train your entire store in CounterSketch.

Visit **Training.CounterSketch.com** for more information.

More Ways To Train

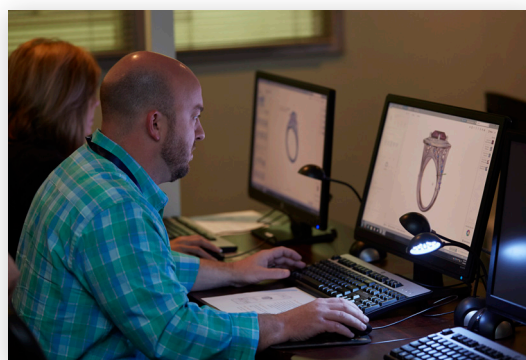
Train One-on-One

This training option is available for an additional fee at our facility or yours. You'll receive one-on-one attention from a skilled Gemvision instructor who can answer your specific questions about CounterSketch. You may choose the range of days, topics covered, format of the class, and your particular skill level and library models of interest.

Train On-Location

The same training conducted at Stuller can be held at a facility provided by the customer for up to four persons. Additional fees apply.

To request one-on-one or on-location training, please email **gettraining@gemvision.com**.



SUPPORT

Gemvision Technical Support

Gemvision's expert Technical Support staff is ready, willing, and able to answer your toughest questions about the CounterSketch software. The support staff is your biggest ally and is eager to help you solve any problems.

Contact the Gemvision staff by phone or email.

For model edit requests, please export your modified model first via the CounterSketch Menu > Export Design and attach it to an email with your request (see Import/Export for more information). Otherwise, include the Model number, and we will use the default

..... LET US HELP YOU

A tool is useless if you don't know how to use it. Gemvision wants to help you and your staff become CounterSketch Power Users. With every training method we offer, you not only learn how to run the program but also how to make the sales.

.....
library version of the model. Whenever possible we will make edits to the file; however, some model requests require a new design. You can make this request through the Design Feedback (see Design Feedback feature for more information) for consideration in the next CounterSketch library of digital inventory.

Stuller CAD/CAM Services

Stuller's expert CAD/CAM Services team is eager to create the designs of your customers' dreams. If you have manufacturing questions, contact us now.

CounterSketch Tech Support

Weekdays 8:00 a.m. - 5:00 p.m. Central time

Toll Free 1.888.357.6272

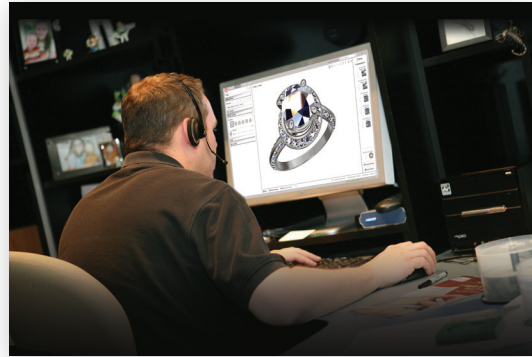
Email countersketch@gemvision.com

Stuller CAD/CAM Services Support

Weekdays 8:00 a.m. - 6:00 p.m. Central time

Toll Free 1.800.877.7777

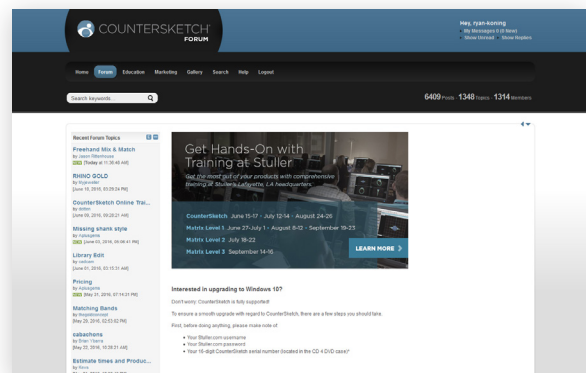
Email camservices@stuller.com



COUNTERSKETCH FORUM

Whether you are looking for tips and tricks, for a refresher on something you missed during training class, or you want to harness the power of our marketing resources, the CounterSketch Forum is your one stop for all things CounterSketch. Access all of the tools by clicking the CounterSketch Menu> Help> CounterSketch Forum which directs you to **CounterSketchStudio.com/Forum**. Here you can mingle with Gemvision and Stuller staff, stay in touch with other users, keep informed of important updates, and peruse the latest resources that Gemvision and Stuller have to offer.

The forum houses on-demand training videos, which allow you to move at your own pace as you work independently through the curriculum. Access the forum from the comfort of your own home 24 hours a day, seven days a week.



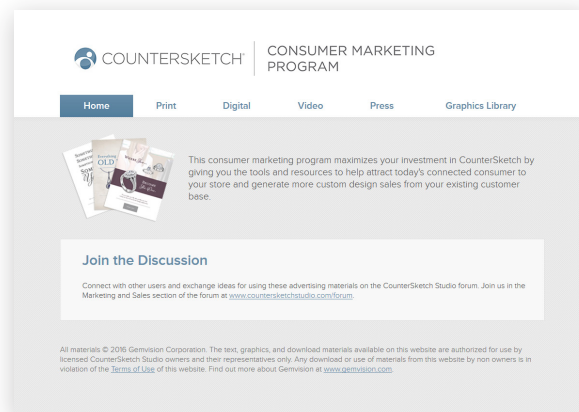
CONSUMER MARKETING PROGRAM

Our consumer marketing program maximizes your investment in CounterSketch by giving you the tools and resources to—

- Attract young, connected consumers to your store
- Generate more custom design sales from your existing customer base

The program consists of downloadable graphics, ready-made print and digital advertising, videos and press releases to help establish your store as the go-to for custom design.

Take advantage of the marketing program at gemvisionadvertising.com/css.



OTHER

About CounterSketch

If you reach out to Gemvision's Technical support Department, they may need to know which version you use to help resolve an issue or determine how to best help you. If they ask, access this information by entering the CounterSketch Menu and selecting About CounterSketch.

Release Notes

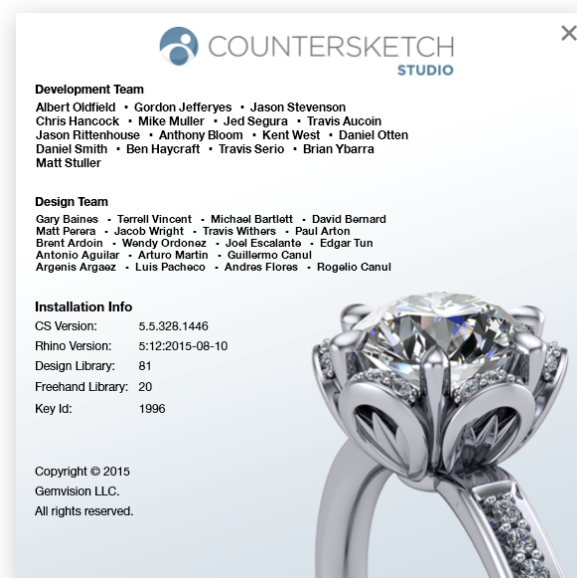
Keep up with what Gemvision's dedicated programming staff has been up to by reading the Release Notes. This helpful documentation gives you access to all of the changes that occur when new upgrades and software patches are released.

Design Feedback

To make suggestions for consideration when developing the CounterSketch library, use the Design Feedback feature.

This menu can be accessed through the CounterSketch Menu> Help> Design Feedback button to open the Feedback menu.

Answer the questions and add comments within this menu to provide valuable feedback on Gemvision designs. The feedback you provide to us on



these models is used to better understand the amount of control and design flexibility our users desire for a specific piece. Once complete, click the Submit button to send the feedback to Gemvision. In the event you change your mind, simply select the Cancel button.

Thank You for your Feedback. We appreciate the time you take to help us make CounterSketch the most helpful tool for your business.

Gemvision Technical Support: 888-357-6272 • countersketch@gemvision.com

Stuller CAD/CAM Services: 800-877-7777 x3804 • camservices@stuller.com

Online Resources: CounterSketchStudio.com/Forum

Training: Stuller.com/CounterSketchTraining

