

This document summarises important Windowmaker enhancements from the release of version 6.x

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Optimised Costing /Pricing	
Optimised Costing /Pricing Tracking	
o	



Windowmaker 2012 R5.3

General Enhancements

Windows Server 2016 for Windowmaker

Windowmaker is now supported to run on Windows Server 2016 operating system.

Glazing: Set-up

The program now allows to set-up Process (Spacer) for sealed units. This allows to set-up different sealed units with same leaves and spacers, but different spacer processes and therefore U-values.

Glazing: 11 : 4-16-4 Clear		>	<
Header Configuration	Attributes Limits		
Do Use Leaf 1 (Outside)	101 :4mm Clear	Process	
Spacer 1	16.0	<any></any>	
Leaf 2 (Inside)	101 :4mm Clear	✓ 960 :Argon 961 :Krypton	
Decess (Unit)	2.6 m. 13		

Glazing: Order Entry

Windowmaker now allows a separate selection for Associated type Glazing Option for sealed units. Earlier Associated options were available under Unit Process.

Glazing Specific	ation			×
Supplier	GSUP5 : Glazing Suppliers	•		
Glass		Pattern	Process	Associated
) Type	29 :4-16-4 Clear MT0 💌	<none></none>	<none></none>	<none></none>
				<none> 295 :Glass Vent</none>
Composition ——		Pattern	Process	Туре
Leaf 1 (Outside)	4mm Clear MTO 💌	<none></none>	<none></none>	
Spacer	16.0		<none></none>	<none></none>
Leaf 2 (Inside)	In Charletto	(None)	(None)	

Elevations

Windowmaker now shows property location, reference, room, quantity, size, system and description as a tooltip on mouse-over on Elevations tab. Earlier these information were displayed at bottom of the screen only when clicked on a sales line.

Enhancements to Options

Entrance Doors

Wallchart for door styles, door slabs and glass inserts now display:

- Stock no.
- Long/Short description
- Supplier Information
- eCatalog name

Additional information like privacy rating for glass-insert and fire rating for door-slab This helps making selection easier.



Dimension OFM Ext. Options <none> Int. Options <none></none></none>	Enter text to search								
	Enter text to search								
Int. Options <none></none>			•	Find	Clear 🔍				
Slab Casing? <none></none>	BFT-6		BLC-6		BLS-6		BLT-6	00	BLW-6
Slab Door Frame II 4-9/16" Door Frame	Belleville Fir Textu		Cherry_80		Belleville Smooth_80		Belleville Oak Textu_80		Black Walnut_80
Slab Threshold <none></none>	MASO01: Masonib MSFG14: Fibreola:		MASO01: Masonite		MASO01: Masonite MSFG14: Fibreglass S	H H	MASO01: Masonite MSFG14: Fibreglass S		MASO01: Masonite MSFG14: Fibreglass S
Door Style 6P_3280_01-2264	90	·>	MSFG14: Fibreglass S 90		MSHG14: Hibreglass 5 90		90		90
2 Door Slab Belleville Fir Textu	BMT-6				MUS-6	_	OAK-6		SHD*
Glass Insert Tanglewood Antique B	Belleville_80Mahog	ny III	Mesonite High Definiti		Mesonite Utility Ste_80		OakCraft_80		Sta-Tru HD Steel
Slab Width 32	MASO01: Masonit		MASO01: Masonite		MASO01: Masonite		MASO01: Masonite		MASO01: Masonite
Slab Height 80	MSFG14: Fibregla:	s	MSSL14: HD Steel 2014		MSSL14: HD Steel 2014		MSFG14: Fibreglass S		MSSL14: HD Steel 2014
	90		90		90		90		90

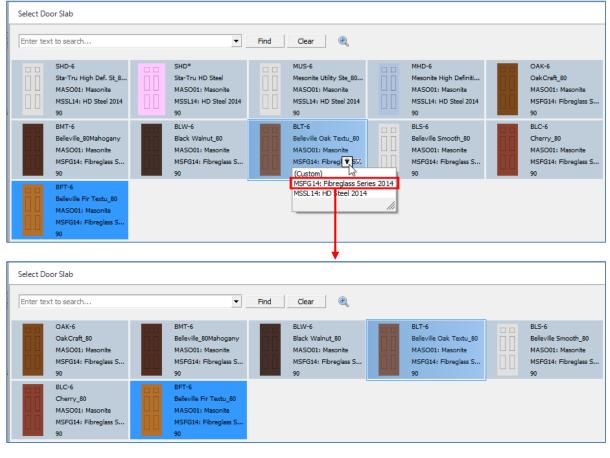
Selection of the required product is made even simpler using:

Filter

Search records containing specified text e.g. "high +steel" finds all records containing 'high' <u>and</u> 'steel' in any of the fields. Searching e.g. "high steel" finds records containing 'high' <u>or</u> 'steel' in any of the fields.

Select Do	oor Slab				
Enter tex	kt to search	•	Find	Clear 🔍	
	BFT-6 Belleville Fir Textu_80 MASO01: Masonite MSFG14: Fibreglass S 90	BLC-6 ♥ △ Cherry_80 MASO01: Masonite MSFG14: Fibreglass 5 90		BLS-6 Belleville Smooth_80 MASO01: Masonite MSFG14: Fibreglass S 90	BLT-6 Bellevill MASO0 MSFG1 90
	BMT-6 Belleville 80Mabogany	MHD-6 Mesonite High Definiti		MUS-6 Mesonite Utility Ste 80	OAK-6 OakCra

You can also filter on values in a specific field using the filter button.



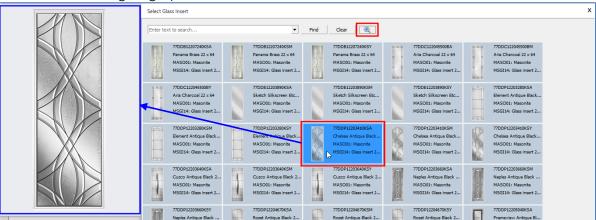


Sort

Arranges the records in ascending/descending order based on the selected field

Select Do	or Slab				
Enter tex	t to search	•	Find	Clear	
	BFT-6 Belleville Fir Textu_80 MASO01: Masonite MSFG14: Fibreglass S 90	BLC-6 Cherry_80 MASO01: Masonite MSFG14: Fibreglass S 90		BLS-6 Belleville Smooth_80 MASO01: Masonite MSFG14: Fibreglass S 90	BLT-6 Bellevil MASO(MSFG1 90
	BMT-6 Belleville 80Mabogany	MHD-6 Mesonite High Definiti		MUS-6 Mesonite Utility Ste. 80	OAK-6 OakCr

Zoom - shows enlarged graphics of the record on mouse-over



Link to Working Centre

Windowmaker can now link to Murat SC 220-40 Working Centre.



Windowmaker 2012 R5.2

General Enhancements

Glazing

It is now possible to test on Process (Spacer) and Spacer Type in Glass level Rules and Matrices.

Sales Line List

Sales Line List now shows separate columns for Total Price, Total Nett (excluding Extras) & Total Discount (%). Columns for all Extras can be selected from the Column Chooser.



Crystal Reports

The program now allows to include/exclude Multiline Text in Customer Documents (Quotation, Order Acknowledgement and Invoice) and Production Document.

Enhancements to Options

Bar Optimisation III

Windowmaker now allows variable bar length optimisation even if scheduling options are not available. Variable optimisation helps find a non-standard bar length that gives less wastage than standard lengths.

Revisions

Program now allows creating Revisions for Orders. This is particularly useful for commercial projects (Phased Orders) where there could be general or plot level changes after the order is received.

Property Types

The program now allows entering quantity > 1 for non-design Sales Lines while setting up Property Products.

Property Types, Surveying

You can now specify Property Location for non-design Sales Lines in Phased Quotes. This enables such Sales Lines to be specific to plots, thereby allowing it to be split per plot.

Commercial Contracts

It is now possible to specify a separate numbering sequence for Sub-orders.

Documents	Automatic	Next No.	Manual	Using Source
Sales Quote	v	Q0042	 Image: A set of the set of the	
Sales Order	v	J0249	~	v
Phased Quote	v	PQ022		
Phased Order	~	PO029	v	~
Sub-Order	 Image: A start of the start of	SB128		
Remakes		0000009		
Return Order	✓	C0003	 Image: A start of the start of	
Purchase Order	~	221		
Deposit				Image: A start of the start
Despatch	✓	000179		
Invoice	~	000046		



Sub-orders can be managed from within the Phased Order.

_									
Si	Sales Order: PO011 : Ardent Windows : Under Survey								
F	Progress Reports View Process								
	역 🖬 🔹 📻 📰 🗐 🌑 🕋 🖉 🔐 🔮 🚳 🐯								
	Customer	Lines		g Documents	User Data				
	Customer			g Documents	User Data				
	1								
þ	💱 Sales Order: PO029 :Ardent Windows 🔪 : Order OK								
	Lines R	evisions l	Elevations Su	b-orders Work	In Progress	History A	nalysis		
	Sub-order		View	Progre	ess	Reports			
8	a 🚅 🔎	- 1) = 🖪 🛃						
	🖁 🗙 🔛	Live	🕈 💽 🛕 🖨	Progre		s Header Repo	rts +		
Ľ		Eive							
D	rag a column	header here	to group by that	column					
	Order ∇	Cust. Ref.	Del. Street	Order Value	Comment	Status	Required Date	Stage	
Þ	SB129		103	3847.96		Order OK	05-06-2017		
	SB128		102	3847.96		Order OK	02-06-2017		
	SB127		101	3847.96		Order OK	31-05-2017		

Excel-based Rules

Windowmaker now allows a new type of Sales Line for which BOM is calculated using System and rules written in Microsoft Excel. This is useful to address designs which Windowmaker cannot handle properly e.g. Glass-to-Glass joins, shapes not supported by Windowmaker.

Sales Quote C	0045 : Ardent	Windows : Input
Progress R	eports View	Process
Customer	Lines Schee	ule Pricing Documents User Data
0		
+	+	+ + + + + + + + + + + + + + + + + + +
F		
Options		Sales Quote 0(058 Line 1 Long Description, Ercel System, SY94 - 🗌 🗙
Outer Frame	2050	Options Techbes Reports
Glass Thickness	6	
Facet 1 Width	1200	

Description Baser Ex02 Ex03 Ex05 Ex05 Ex05 Total Price & Discount	10701.54 0.00 • 450.50 0.00 2000.00 0.00 2000.00 0.00 353.85 0.00 47945.89 0.00	Production Note Image: Control of Con
Description lose 2x02 2x03 2x05 2x07	10701.54 0.00 + 450.50 0.00 3000.00 0.00 2000.00 0.00 353.85 0.00 +	Pice (10/0154 Discourt % (0.00
Description Baser Ex02 Ex03 Ex05	10701.54 0.00 + 450.50 0.00 3000.00 0.00 2000.00 0.00 353.85 0.00	Picaletien Note
Description line x02 x03	10201.54 0.00 × 450.50 0.00 3000.00 0.00	Picaletien Note
Description Lose 2x02	10701.54 0.00 • 450.50 0.00	Pinduellos Motos
Description later	10701.54 0.00 -	
Description	anna na anna 171	
	Nett +/-	ratikiton Note
Freeze Price 🗋 8		
rice & Discount		
		Decemption_Ex_SYPA
		Long Description_Excel System_SYPA
Facet Height	1200	51/74
Facet 3 Width	960	System SYPA Description_Ex_SYPA -
	2440	Ret NuT Location (Lounge 💌 Bh. 1
Facet 2 Wolth		
	6	



New Options

Commercial Contracts II

It is now possible to progress Phased Orders in Stages. Each stage can be independently manufactured, delivered and/or installed e.g. Sub-frames/cavity closures, frames, sashes, flyscreens, installation, retention.

Price contribution of the Stage can be defined as a percentage of a set of Costheads and Extras. You can also define the Costheads to be included in the BOM. Stages applicable need to be defined on the Order Type.

When a Phased Order is progressed to Under Survey,

Installation

OK

Retention

- For each plot, you can specify Orientation of Front Face, and whether the plot is a mirror of the original.
- The program will automatically:
 - Split Sales Lines in the Phased Order per hole-in-the-wall.

Cancel

- Create a Sub-order per Plot (unique combination of Area, Floor and ID e.g. Tower B/Floor 7/House no. 704) per Stage.
- Mirror the designs (where available) and their positions, if specified, for Plots containing only Standard Elevations.

Tolerance Limit

Round down to



P	Split	Sal	es	Lines
---	-------	-----	----	-------

Specify Plot Details

i 🖨 🞑

Drag a column header here to group by that column

	Property	Area	Floor	ID	Location	Orientation of Front Face	Mirror	Custom Elevation
ų								
	2-Bed	Vistara Park	1	101	Vistara Park/1/101	North		
	2-Bed	Vistara Park	1	102	Vistara Park/1/102	East	•	
Ø.	2-Bed	Vistara Park		103	Vistara Park/1/103	East 💌		

V Split Sales Lines

Review Constituent Details

	_	
	1 h.	1.4
101		
- 64	-0	
_	_	

Drag a column header here to group by that column

	Line	System	Description	Area	Floor	ID	Location	Room	Face	Elevation Description	Reference	Orientation
뎧												
Þ	0001	SY01	Casement T/F.R	Vistara Park	1	101	Vistara Park/1/101	Lounge	Front	2-Bed - Front	W1	North
	0002	SY01	Casement T/F.R	Vistara Park	1	102	Vistara Park/1/102	Lounge	Front	2-Bed - Front	W1	East
	0003	SY01	Casement T/F.R	Vistara Park	1	103	Vistara Park/1/103	Lounge	Front	2-Bed - Front	W1	East
	0004	SY04	Residoor L	Vistara Park	1	101	Vistara Park/1/101	Lounge	Left	2-Bed - Left	D1	West
	0005	SY04	Residoor L	Vistara Park	1	102	Vistara Park/1/102	Lounge	Right	2-Bed - Right	D1	South
	0006	SY04	Residoor L	Vistara Park	1	103	Vistara Park/1/103	Lounge	Left	2-Bed - Left	D1	North

Enhancements to Windowmaker SQL

Customers

It is now possible to import customers from a FTP location.

You can:

- Export Customers from an external system e.g. CRM in a pre-defined XML format
- Keep the XML file in a shared folder on the SQL Server or a FTP location
- Schedule to automatically import Customer at the specified interval



Windowmaker 2012 R5.1

General Enhancements

Order Entry

Sales Quotes/Orders can now have any number of Systems.

The program now allows an Analysis Code (General Ledger / Nominal Ledger sales account in the accounting system) to be specified for Main Systems and Pricing Extras Categories. Multiple systems can have the same analysis code.

/stem SY01: Int. Glazed	l Casement		Mapplication Settings						
Catalog	<main> SY01</main>	Analysis Code 1001	Sales Pricing Tax	^		Analyse Extra	s Separately		Price Optie
System	19101	Analysis Code 1001	Sales Header Status			Value	AnalysisCode 2001		Desi
Description	Int. Glazed Casement		Elevations Sales Line		-	EX01 EX02	2001		Deci
			Link To CAD			EX03	3002	IГ	Appl
			Settings		-	EX04	3003		$^{\circ}$
			Survey	~	-	EX05 EX06	3001 4001		0
					-	EX07	4002		•
			Manufacturing	~		EX08	5001		Us
			Delivery	~		EX09	6001		
			Installation	~	Ŀ	EX10	6002		Us
			Administration	~	-0	ace lines		_	Sys

On Analysis tab, now Analysis Code are also shown. Sub-totals are shown when multiple systems have the same Analysis Code.

Analysis	1	Windowmake	19-01-2017		
Quote No.	Q0039		U-value	2.70	
Code	System	Description	Value	No. Frames	Quantity
1001	SY01	Int. Glazed Casement	11312.74	14	6
	SY02	Ext. Glazed Casement	1344.58	2	2
			12657.32	16	8
1002	SY04	Int. Glazed Doors	6552.86	7	3
	SY05	Ext. Glazed Doors	1176.98	1	1
			7729.84	8	4
2001	EX01	Foiling	96.00		
3001	EX05	Lifting	160.00		
3003	EX04	Installation	5520.00		
Total			26163.16	24	12

Glazing

Following new Glazing Options have been introduced:

- 1. Process (Spacer) e.g. Argon, Krypton (It is recommended not to use this until a future version allows it to be stored with each sealed unit in setup)
- 2. Spacer Type e.g. Silver bar, Bronze bar

For sealed units you can apply these at the time of order entry.

For Triple and Quadruple Glazed Units the program now allows to:

- 1. Specify separate thicknesses for each spacer
- 2. Use patterned glass for central leaves
- 3. Apply a process for each leaf



Sealed Unit (SU) Glazing Description:

Before Upgrade	After Upgrade
<su description=""> <unit pattern=""> <process (unit)=""> < Process (Spacer)> <leaf -="" outside="" pattern=""> <process (leaf)="" -="" outside="">, <leaf -="" inside="" pattern=""> <process (leaf)="" -="" inside=""></process></leaf></process></leaf></process></unit></su>	<su description=""> <unit pattern=""> < Process (Unit)> < Process (Spacer)> <spacer type=""/>, <leaf -="" outside="" pattern=""> <process (leaf)="" -="" outside="">, <leaf2 pattern=""> <leaf2 process="">, (if applicable) <leaf3 pattern=""> <leaf3 process="">, (if applicable) <leaf -="" inside="" pattern=""> <process (leaf)="" -="" inside=""></process></leaf></leaf3></leaf3></leaf2></leaf2></process></leaf></unit></su>

These changes are reflected in the XML (XSD) and A+W Glass Purchase Order formats.

Glazing: 961 : Krypton Krypt	on	
Header		
Stock No.	Krypton	
STOCK NO.	,	
Description	Krypton	
Туре	Process (Spacer)	-
Costhead		iside) - Thickness only
Costing	Grid - Stuck on (Out Grid - Stuck on (Bot	
Approach	Grid - Between leav Grid - Between leav Grid - Separate Glas Leaded Process (Leaf) Process (Unit) Associated	es and Stuck on (Outside) - Thickness only es and Stuck on (Outside) - Profiles es and Stuck on (Both sides) is
	Process (Spacer) Spacer Type	

izing: 41 : 4-4-4-6-4 Clr-Pat-Clr l	ИТО	
Header Configuration Attribut	es Limits	
Do Use Leaf 1 (Dutside)	112 :4mm Clear MTO	•
Spacer 1	620 : Spacer 4mm (4.0)	•
Leaf 2	121 :4mm Patterned	•
Spacer 2	621 : Spacer 6mm (6.0)	•
Leaf 3 (Inside)	112 :4mm Clear MTO	•
Process (Unit)	961 :Krypton	•
Subsystem	<none></none>	•
Thickness	22.0	

Supplier	GSUP1 : Double Glazing Su			
- Glass Type	20 :6-8-4-6-4-8-6 Quar 💌	Pattern <none></none>	Process	[
- Composition		Pattern	Process	Туре
Leaf 1 (Outside)	6mm Clear 💌	<none></none>	<none></none>	
Spacer 1	8.0		960 :Argon 💌	970 :Silver bar 💌
Leaf 2	4mm Patterned 📃	151 :Arctic	<none></none>	
Spacer 2	6.0		960 :Argon	970 :Silver bar
Leaf 3	4mm Patterned 💌	160 :Flemish 💌	<none></none>	
Spacer 3	8.0		960 :Argon	970 :Silver bar
Leaf 4 (Inside)	6mm Clear 📃	<none></none>	<none></none>	
Description:	,	argon, Silver bar, Arctic Flemis	·	

Designs – Combination pane Types

Following new Pane Types are now available:

Design	Remarks
1. XiOmO	Two variants are available – X on the inner track
2. OmOiX	and X on the outer track.
3. OmXiOiXmO	
1. OiXiXiX	Now available for windows too.
2. XiXiXiO	



1.	XiOiX	Now a variant with O on the inner track is also
2.	OiXmXiO	available. Earlier these designs only had O on the
3.	XiXmXiX	outer track.
4.	OiXiXmXiXiO	
5.	XiXiXmXiXiX	
6.	XiXiO	
7.	OiXiX	
8.	XiO	
9.	OiX	

Reports - Export

For ORD_ reports that are designed to be exported (using the Export button on Report dialog), the program now allows static text (as prefix/suffix/in between) to be included in the name of the exported file if defined through appropriate parameters e.g.:

WM-ORDER_J0029_20-12-2016 J0029_20-12-2016_WM-ORDER

Devent Color Octor 10	072			
Report: Sales Order: J0	073			×
Report	WM_Link to WM Measure	Ŧ	General Settings	Settings
Printer: pdfFactory Pr	0			Change Printer
Print	Preview (PDF) Expo	ort Export	Email	Cancel

NFRC Labels

A standard NFRC Labels report is now available. It generates a label for each frame, in a production batch, that is NFRC certified. Various parameters can be specified on Report Settings as Option numbers.

ttings	
Frame Type	420
Product Type	411
Glazing Description	419
CPD No.	412
Manufacturers own Product Identificaion	<u></u>
U-Factor	413
Solar Heat Gain Coefficient	414
Visible Transmittance	415
Air Leakage (U.S/I.P)	416
Air Leakage (Metric)	417
Condensation Resistance	418
Pre-printed	
Language	English
Logo Image	logo.png
Include Metric units	
Barcode Format	12o5, Numeric 💌
Footer Text	www.windowmaker.com

National Fenestration Rating Council®	WINDOWMAKER* SOFTWARE Unit A- 115 Wokeley Street Toronto CM M6J 1K1 Carued PVC Profile EWG-K-1-01772-00001 343 Slider Series DS DGU-Argon- W/O Grids		
	RMANCE RATINGS		
U-Factor	SolarHeatGC		
0.28 1.59 (U.S./I-P) (Metric/SI)	0.22		
ADDITIONAL PERF	ORMANCE RATINGS		
Visible Trans.	Air Leakage-Imperial		
0.51	≤ 0.30		
	(U.S./I-P) (Metric/SI)		
CondensatonRes.			
	—		
Manufacturer stipulates that these ratings confo determining whole product performance. NFRC environmental conditions and apeofic product a product and does not warrant the suitability of a Manufacturer's literature for other product perfor- www.	ratings are determined for a fixed set of ize. NFRC does not recommend any ny product for any specific use. Consult		
19689000/0009			
	>> (<		



Enhancements to Options

Pricing - Extras

Pricing Extras categories have been increased from 3 to 10.

'Nett' and 'Nett after Tax' can be edited for Extras categories.

Terms-								
C Cost	Plus	Price List						
Order Ty	/pe	1 : Domestic 💌						
					Apply pro-rata	to Sales Lines		
C1	C-d-	Description	C	D:	D:	b1_11	T (4) %	New glass Test
System	Code	Description	Gross	Discount %	Discount2 %	Nett	Tax (A) %	Nett after Tax
CV01	1001	Int. Glazed Casement	11312.74	0.00	0.00	11312.74	17.50	13292.47
5101	1001	ini, diazeu casemeni	THOIL. TH					
	1001	Ext. Glazed Casement	1344.58	0.00	0.00	1344.58	17.50	1579.88
SY02					0.00 0.00	1344.58 6552.86		
SYO2 SYO4	1001	Ext. Glazed Casement	1344.58	0.00			17.50	1579.88
SY02 SY04 SY05	1001 1002	Ext. Glazed Casement Int. Glazed Doors	1344.58 6552.86	0.00 0.00	0.00	6552.86	17.50 17.50	1579.88 7699.61
SY02 SY04 SY05 EX01	1001 1002 1002	Ext. Glazed Casement Int. Glazed Doors Ext. Glazed Doors	1344.58 6552.86 1176.98	0.00 0.00 0.00	0.00	6552.86 1176.98	17.50 17.50 17.50	1579.88 7699.61 1382.95
SY02 SY02 SY04 SY05 EX01 EX04 EX05	1001 1002 1002 2001	Ext. Glazed Casement Int. Glazed Doors Ext. Glazed Doors Foiling	1344.58 6552.86 1176.98 96.00	0.00 0.00 0.00 0.00	0.00 0.00 0.00	6552.86 1176.98 96.00	17.50 17.50 17.50 17.50	1579.88 7699.61 1382.95 112.80

Surveying

A report is now available to export details of a Sales Order that needs to be surveyed, to a CSV file. It can then be imported as a project in <u>Windowmaker Measure</u> app to record survey details. Elimination of manual entry speeds up the process and reduces possibility of errors.

Revisions

A new User Defined Function (UDF) 'WMSalesLineDifferences' has been added for use in Crystal Reports, to enable the reporting of differences between two revisions of a Sales Quote.

For a Sales Line in the source revision it will compare with a Sales Line with matching Reference in the target revision. It returns differences in the following format:

Shape; Shape Dimensions; Installation Note; Design; Glazing; Internal Dimensions; Price; PVC Colour: White; Brown; Cill: 120 mm; 150 mm

For Options, answers of both revisions are listed. For the **rest** just conflicting field names are listed.

This UDF is currently not used in any standard Windowmaker report.

Link to Sales

In a Sales Invoice transaction, an Invoice Line per Analysis Code will now be generated instead of per System.

Link to Welder

The program can now link to URBAN AK\$1805 welder.

Link to LogiKal

You can now specify Reference and Location for LogiKal Sales Lines.



Windowmaker 2012 R5

Enhancements to Options

Commercial Contracts

You can now specify separate numbering sequences for Phased Quotes and Orders. Sub-orders of the Phased Order will always be numbered as Phased Order No. + <Phase No.>, where Phase No. is adjusted so that the Sub-order No. is always 8 characters e.g. PO010001 for Sub-order 1 of Phased Order PO01.

Sales	~	Default Numberin	ig			
Survey	~	Documents	Automatic	Next No.	Manual	Source
Survey		Sales Order	✓	J0221	✓	✓
Manufacturing	~	Sales Ouote		O0035		
		Phased Order			Image: A state of the state	Image: A start of the start
Delivery	~	Phased Quote				
Installation	~	Return Order	 Image: A start of the start of	C0003	 Image: A start of the start of	
Installe con		Purchase Order		208		
Administration	~	Deposit				Image: A state of the state
		Remakes	Image: A state of the state	R00010		
Settings		Invoice	Image: A start of the start	001129		
Document Numbering		Despatch		000179		

Property Types

Copy Sales Quote

The program now allows to copy a Sales Quote containing Property Sales Lines from one customer to another. Elevations in the source Sales Quote are also copied. To achieve this, program automatically copies the relevant Property products from the source customer to the other customer.

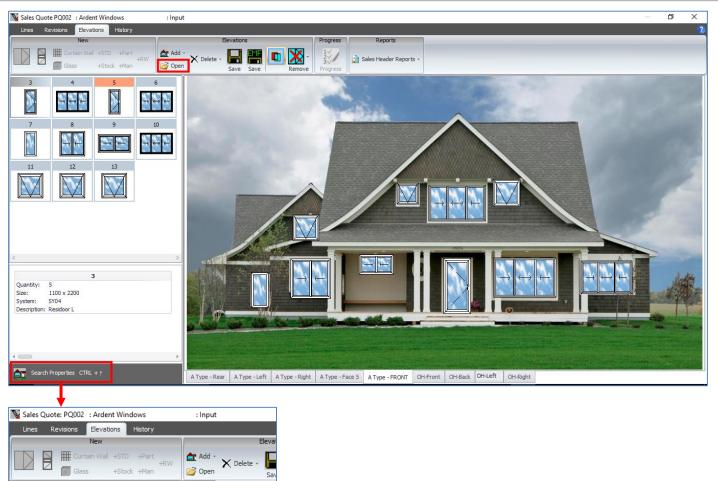
Search Elevations

It is now possible to Search (Ctrl + 1) Elevations associated with selected Properties in a Sales Quote. This is particularly useful when the Sales Quote contains multiple Properties with many Faces for each. By default, Elevation view lists Faces of the first Property and those directly associated with the Sales Quote.

The program now also allows to:

- Search Elevations using Product No. or Short Description or both
- Rename Faces easily by double-clicking
- ▲ Edit Elevation image using 'Open' button e.g. to add any additional information text
- Add Property Sales Lines from the Elevations tab
- Add '+Part' and '+Stock' Sales Lines from the Elevations tab associated image is displayed on the Elevation
- Specify Location for '+Part' and '+Stock' Sales Lines





Link to QuickBooks

Product No.: 0000001 Description : A Type-5 Bed room

00000002

Windowmaker can now synchronise Stock Issue Transactions with QuickBooks (desktop version). These are posted in QuickBooks as Inventory Adjustment transactions.

New Options

Remakes

00000001

The program is now enhanced to handle remakes and replacement orders easily and more efficiently. Remakes may be required for various reasons such as damages, manufacturing mistakes, incorrect specifications or survey etc. Replacement orders are required to fix issues with already installed windows. It might be for the full window/door or a part of it.

When creating a remake for a Sales Line corresponding to a window/door:

- Specify a reason for remake, these must already be set-up
- ▲ Change specification if necessary e.g. correct sizes
- Select sub-assemblies to remake, this automatically selects corresponding BOM lines
- Deselect BOM for components that can be reused e.g. handles.
- ▲ The Price is calculated automatically if using Cost+Mark-up pricing approach, or key in a price



This will create a new Remake Order consisting of the sub-assembly to be remade as a Sales Line. Separate document numbering and user rights for Remakes are available.

You can analyse the reasons and cost of remakes to take the necessary corrective and preventive measures.

Image Specification Stable No. Image Specification Image Sp	Image: Second and processes Second and proceses Second and processes							I	Sales Order: J0220 : Ardent Windows	: Despatched		
Non-to-inform Non-to-inform<	Non-to-inform Non-to-i	rder: J0220 : Ardent Win	idows : Des	patched					Lines Work In Progress History			
Implementation Imple	into locate and journel work joure work journel work journel work journel work	Reports View Pri	ocess						New			
Image: Section from the section for the sectin for the section fore section for the section for the sectin fore	Image: Section from the section for the sectin for the section fore section for the section for the sectin fore								+RW	Open X Delete		
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Price 85.0	Price 85.0				1							
		•	Wht Lck RH	Cockspur Locking			V			-		
OK Cancel	OK Cancel		Wht Lck RH ST075-WHT	Cockspur Locking			V					
			Wht Lck RH ST075-WHT	Cockspur Locking			V			•		



Windowmaker 2012 R4.8/R4.9

General Enhancements

Quotation

The program now allows to optionally print performance ratings e.g. NAFS, NFRC, CE etc. in standard Windowmaker Quotation. For multi-frame sales lines ratings are output separately for each frame.

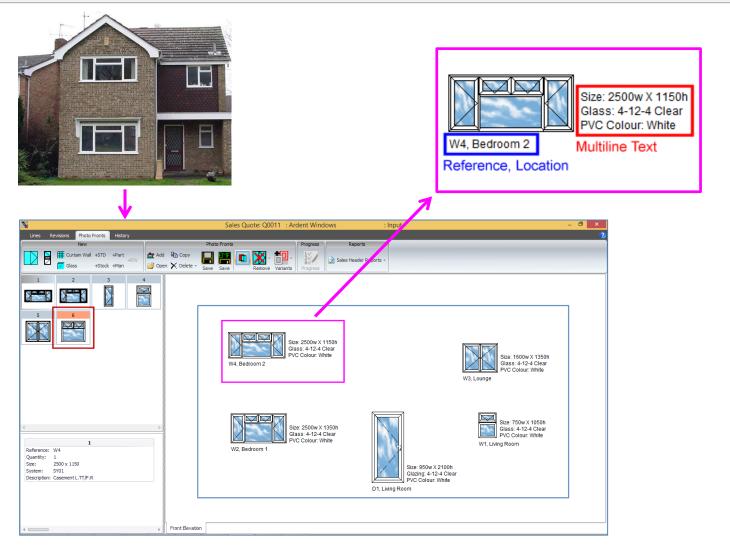
				Se	ettings			×
Stationery	Plain	•	Page Header	F	Print on first page			
Top Margin	1		🗌 Window enve	elope				
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Logo Image								
Include Customer reference	е		🔲 Include U-val	ue				
🔲 Include Zero-value Extras			🔲 Print Thousar	nds Separator		Sizes	<default></default>	•
Format	Quote Pri	cing 💌						
Detail Sequence	Graphics,	Text 💌	Detail font size	1	10 💌	🔲 Sales Line Specifica	tion using Multiline Text	
Sales Line Graphics	<default></default>	•	Include Dimensio	ns Ir	nternal 💌	Suppress Graphics deta	ils 1	
🔽 Include Sales Line Plan			Include Plan Dim	ensions 🖂	(Default>			
Print Options			🔲 Output only n	on-default Answer	15			
Performance Rating Description	n (1) NAFS		Performance Rati	ing Options (1) 5	551; 552; 553; 554; 555			
Performance Rating Description	n (2) NFRC		Performance Rati	ing Options (2) 📗				
Print each Sales Line on n	ew page							
OK Cancel	Save as Defa	ult						
0002								
SCE PICT		Cas	ber System sement T//F 0000w x 48		Dimension ? Reinforcement ? Frame Depth Hinged Series (Profile)Color? Coupler 180 ? Picture Frame ? Window Frame ? C'ment T-Sash ? Glz. Stp Shape? Gasket Colour ? 3mm Dual Clr (1/	White 10mr 4-1/2 ? 4-1/2 2-1/2 Slope White	m ment Window n In Picture Frame In Outer Frame In	1
NAFS +ve Design Pres -ve [esian Pres	WaterPenetratio	Canadian Air L	•				-
3600 2640	3600 2640	730 730	A3 level Fixed	-				1
NFRC	2040	730	Fixeu					-1
U-Factor(SI) So	larHeatGC	Visible Trans.	Air Leakage	Condensat	tonRes			1
0.26	0.20	0.52	0.12	55				1
0.30	0.30	0.52	0.14	55				

Photo Fronts

It is now possible to

- ▲ Include Sales Line multiline text and/or Reference & Location in Photo Fronts.
- Include Dimensions, Pane Type Graphics, Pane Type Text and an image for glass in Sales Line Graphics.
- Distinguish Sales Lines not used in any Photo Front from the rest.





This facility makes it easy to print summary information of items alongside the elevation graphics on photo front or any custom report. Benefits of the facility include:

- Property specification in the form of a photo front (multiple elevations) report at quotation stage
- Provide information to Surveyors & Installers for easy identification of sales lines and their locations
- Flexibility in choosing contents for the photo front report
- Flexibility in positioning Multiline Text

Note that the Sales Line multi-line text can be automatically generated if using the Multiline Description option.

Properties for Multiline Text Block and other choices are defined in Application Settings → Sales: Photo Front:

N	Application Settings
Sales Tax Sales Header Status <u>Photo Front</u> Sales Line Link To CAD Settings	Sales Line Graphics Glass Image Pane Type Graphics Mixed Glazing Identifier Pane Type Text Dimensions
Survey Manufacturing	
Delivery	Reference, Location Bottom Multiline Text Right
Installation	Font
Administration	Name Adal Size 10



Non-design Sales Lines

The program now allows quantity up to 65,000 for non-design Sales Lines (+Part, +Product and +Man), instead of 999.

Frame Labels

The program now outputs Sales Line Reference in Frame Labels. This helps to easily verify items during delivery, installation, inspection etc.

J0076/ 0001/ 1	AG01 AGS SY01 Int.Glazed Casement	Casement LR	1	1/J0076 24-08-2016 <mark>Wed</mark> 1200w x 1200h
Left Plight Viewed from Outside		W1 Living Room 4-12-4 Clear		00007402000100 U-value 2.64
				Windowmaker

Grid-based Forms

All grid-based Set-up forms can now be customised by SUPERVISOR to have different layout for different user roles. The SUPERVISOR can define and export the layout to an XML file. Users can then import the XML to apply the customised layout. This helps staff in different departments to only view information relevant to their routine activities.

		SUPERVIS	OR (0001) -	- Windowmak	er - Win	dowmaker	2012 R4	4.8 S(Chris	(0011) <mark>-</mark> Wi	ndowmaker -	Window	vmaker 201	2 R4.8 S	QL
Sales									Sale	s								
3						Sales Qu	uotes (L	ive)	B							Sales Q	uotes (l	.ive)
<u>F</u> ile <u>E</u> dit	<u>V</u> iew <u>P</u> r	ogress <u>R</u> eports	Pro <u>c</u> esses	<u>T</u> ools <u>H</u> elp)				<u>F</u> ile	<u>E</u> dit	<u>V</u> iew <u>P</u> r	ogress <u>R</u> eports	Pro <u>c</u> esses	<u>T</u> ools <u>H</u> elj	þ			
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Quote 🗸	7 Account	Name	Cust. Ref.	Order Value	Status	Comment	Area	Owr	Que	ote ⊽	Account	Name	Cust. Ref.	Order Value	Status	Comment	Area	Owr
9									9									
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00011	AA01	Ardent Windows		8866.10	Input		Local		000	11	AA01	Ardent Windows		8866 10	Inout		Local	

Designs Form

This is now grid-based.

This facilitates:

- ▲ Filtering/Sorting/Searching designs easily and quickly
- Export/Import SDF
- Export/Import Updates for the Descriptions (Long and short) and Product No.

				N						
				<u>F</u> ile	<u>E</u> dit	<u>V</u> iew <u>T</u> o	ools <u>H</u> elp			
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No.	Description	~	\rightarrow	Options	Desigi		Fart Matrices	Systems		
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2	D0002 Casement Fixed/Fixed with Transom			ID	_	Product	No. Lo	ng Description		Design Class
3	D0003 Casement TOP^L			9		Troduce		ing beschpas	•	besign class
4	D0004 Casement TOP^R			Y						
5	D0005 Casement Left			Þ	70000	1 D0001	Ca	sement Fixed		Gl.Ext/In
6	D0006 Casement Right			-	70000	2 D0002	Ca	sement Fixed/Fix	ed	Gl.Ext/In
7	P0007 Casement Top^R/Fixed with Coupler					2 00002		sement TODAL		CLEX/III

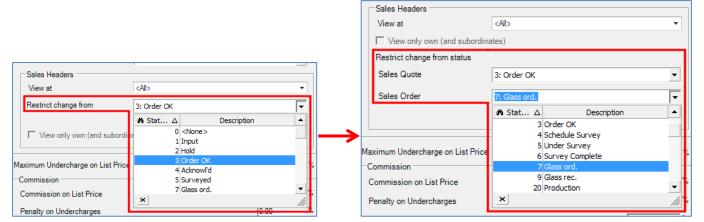
Stations: Saw/Rack/Welder/Glass Cutting/ Glass Optimiser

All station information is now stored in database. This is part of the drive to abolish any flat file storage and take advantage of the relational database system.



User Rights

The program now allows separate 'Restrict Change from' status for Sales Quotes and Orders.



SQL Server 2016

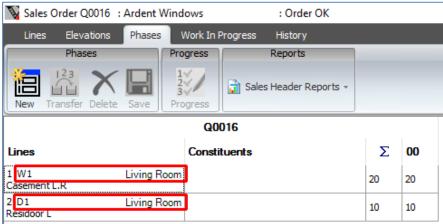
Windowmaker now supports SQL Server 2016. Refer below table for details.

SQL version		press, Windowmaker Windowseller		naker SQL and wmaker ERP	Windowmaker SQL + synched Sales client		
	Now	Soon	Now	Soon	Now	Soon	
2005	No	No	Yes	No	No	No	
2008 & R2	Yes	No	Yes	Yes	Yes	Yes	
2012	No	No	Yes	Yes	Yes	Yes	
2014	Yes	Yes	Yes	Yes	Yes	Yes	
2016	Yes	Yes	Yes	Yes	No	Yes	

Enhancements to Options

Commercial Contracts

The program now displays Reference and Room on the Phases dialog. This helps easy identification of Sales Lines.



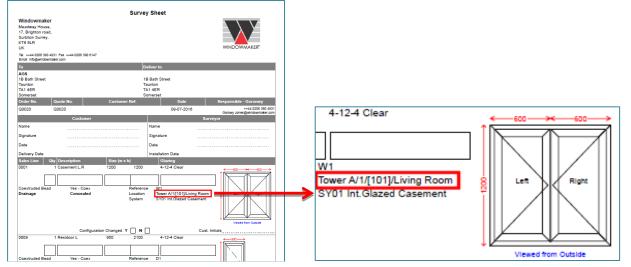
Commercial Contracts, Surveying

For Sales Lines in a Phased Quote it is now possible to specify different location details to distinguish each hole in the wall.

2	Edit Sales Line Location	×	V	Edit Locatio	on	
Property						
Туре	Villa B		Drag a column header	r here to group by that column		
Area	Tower A; Tower D		Area	Floor	ID	
Floor	1-3, 5; 1, 4-5		9			
11001			► Tower A	▼ 1	101	
ID	[101,102][201,202][301,302][501];[101,102][401,402][501]		Tower A	1	102	
			Tower A	2	201	
	No. Properties = 12 Preview		Tower A	2	202	
	· · · · · · · · · · · · · · · · · · ·		Tower A	3	301	
Elevation	- Orientation	<u>~</u>	Tower A	3	302	
Property Location	Tower A; Tower D / 1-3, 5; 1, 4-5 / [101,102][201,202][301,302][501];[101,102][401,402] [501]	0	Tower A	5	501	
	[001]		Tower D	1	101	
Sales Line			Tower D	1	102	
			Tower D	4	401	
Room	•		Tower D	4	402	
Reference			Tower D	5	501	
Hole in Wall	Tower A; Tower D / 1-3, 5; 1, 4-5 / [101,102][201,202][301,302][501];[101,102][401,402]	0	* <select></select>	<select></select>		
	[501] /			1	1	

WINDOWMAKER SOFTWARE

When the Phased Order is progressed to 'Under Survey' status these parameters are combined to give unique Location value for each individual hole in the wall. The Survey Sheet outputs sales lines in plot sequence, and precise location is output for each hole in the wall. This would save a lot of time and reduce any chance of errors if these details are entered manually. The hole in the wall Location is also output on Frame Labels.



Property Types

For Property Sales Lines it is now possible to view its constituents and other details.

		Sales Quote:	Q0015 :Line 1:00000009:te	st
þ	000000	09 :		
	Header	Lines El	evations	
			New	Edit
I٢		Curta	in Wall +STD +Part	🚰 Open 🗙 D
ľ		7	+RW +Stock +Man	🖹 Copy 🛅 Se
D	irag a colu	mn header here	to group by that column	<u> </u>
	Line	System	Long Description	Size
Þ	0001	SY01	Casement Fixed	1000 :
	0002	SY04	Residoor L	950 x
_	0003	SY04	Residoor L	950 x
	0004	SY01	Casement Fixed	1000 :
	0005	SY01	Casement Fixed	1000 3



Multiline Description

It is now possible to auto-generate multiline text for a Sales Quote/Order, using pre-defined templates. This can be set on the Order Type and can contain Sales Header details such as customer name, contact details, Invoice address, Delivery address, User Defined Fields, Weight, as well as Sales Line level fields Options and Glazing.

- Text specified on the Order Type can be viewed from the Sales Quote/Order Documents page
- Text specified on the System Header can be viewed from the Solution page Specification

Progress Reports View Process	Options Toolbox Reports
	<u>₽!</u> ⊟ –] 19 📰 🔢 🗐 🔒 Ξ 3 🝝 📖 🚻 🗙
Customer Lines Schedule Pricing Documents Analysis	Ref. Location
Specification Ardent Windows info	System SY01 Int Glazed Casement
Quotation	Design 1 🔽 D0001
Document (None)	Casement Fixed
Header None>	4-12-4 Clear

If Sales Line level fields are set, it outputs <u>all</u> answers used in the Quote/Order. E.g. If a Quote contains 6 mm Clear glass in some items and 6 mm Toughened glass in all other items, setting Glazing field in template will output "6 mm Clear; 6 mm Toughened".

V	Order Type 1: Do		V		Specificatio
Header Fields ID 1 Description Domestic I Duplicate Sales Line entry require			In	Merge Fields	w All View Merged
Costhead Terms	Mark-up Mark-up	1		Del. Country Del. County/State Del. Street Del. Street2 Del. Town/City	· · · · · · · · · · · · · · · · · · ·
				Del. Zip/Postal Code Email Fax Inv. Country	Name: <mark><<customername:< mark=""> Cust. Ref.: <mark><customerre< mark=""> Tel.: <mark><<telephone>></telephone></mark></customerre<></mark></customername:<></mark>

It is possible to include Sales Quote/Order level Multiline Description in custom Crystal Reports.

Multiple Sites, Tracking

The program has been enhanced to make tracking implementation at multiple sites simpler.

Tracking

Tracking information can now be setup on the real station (e.g. saw, welder etc.) rather than creating separate tracking stations. For this you can associate a status with the station.

Tracking records are now generated up to 'Despatched' status, instead of up to 'In Despatch'. This means you can now track e.g. whether frames are loaded on the truck or not.



Production Scheduling

Delivery Scheduling

Survey and Installation Scheduling

Order Date and User Defined Fields (UDFs) are now available for display on Production, Delivery, Survey and Installation Schedule Boards.

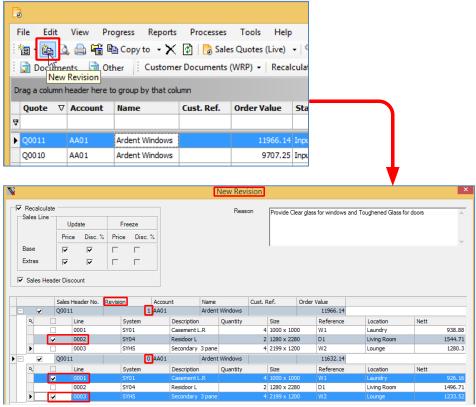
		1	1		L	Customization		
Order	Area	Status	Order Date	Survey Capacity	Required Date	Customization	x	
Q0020	Local	Under Survey	09-07-2016	16		Account		-
J0073	Local	Under Survey	05-05-2016	1	12-05-2016	Architect		
J0071	Local	Under Survey	03-05-2016	1	13-05-2016	Comment		
J0065	Local	Under Survey	02-05-2016	5	09-05-2016	Cust, Ref.		
J0066	Local	Under Survey	02-05-2016	1	09-05-2016	Del, Country		
	1			-		Del. County/State		

New Options

Revisions

The program now allows maintaining revisions for Sales Quotes.

If there are any changes required to a Sales Quote you can create a new revision, instead of changing it directly. It is possible to create a new revision from any of the previous revisions or by selecting appropriate sales lines from previous revisions.



Previous revisions are read-only.

A History record is generated whenever a new revision is created. The reason for the creating the revision is also recorded in the history.

Only the latest revision is listed under Live Quotes view. Select 'Revisions' button to view all previous revisions:



		V				Sales Q
Progress Reports View Process		Lines Revisions	Photo Fronts	History		
		Revisions		View		Progress
Customer Lines Schedule Pricing Documents Analysis]	[™] New [™] Nelete	 ● Expand Expand □= Collapse 	Restore Defaults Customise Appearance	Print Preview Print Refresh	Progress
1 + 2 + 3 + 1 + STD + Stock	+1	Drag a column header)[- Reirean	Trogress
	T1	Sales Quote	Revision	Account	Name	
1 1000w x 1000h W1 2 950w x 21		▶ Q0011	1	. A01	Ardent Windows	
15 @ 838.04 Laundry 1 @ 1376.20	Liv	Q0011	0	A01	Ardent Windows	

The revision no. is output on the Quotation after a '/' to the Quote No.

Windowmaker Meadway House, 17, Brighton road, Surbiton Surrey, KT6 5LR UK Tel. ++44 0208 390 4931 Fat Email info@windowmaker.co		Quotation			WINDOWMAK	ER
То		Deliver to				
Ardent Windows 7 Lustrum Avenue Portrack Lane Stockton On Tees TS18 2RB Cleveland		7 Lustrum Ave Portrack Lane Stockton On T TS18 2RB Cleveland				
Quote No.	Customer Ref.	Quote Date	Date		Responsible - Chr	is
Q0011/2		12-07-2016	12-07-2016		++44 020 Chris Hockey@window	8 390 4931 maker.com
Sales Line	Description					Qty
	-500 Laundry Int.Glazed Casemen Casement L.R	t PVC Colour T-Joins	r	Brown Welded		4

The latest or any of the previous revision can be accepted and converted to an Order. There is an option to delete all previous revisions.

The revisions feature will be useful in many ways:

- Easy to keep history and track changes
- Easy to make a new revision using Lines from different revisions
- Avoid clutter in the Quotes (Live) view
- Eliminate errors as previous revisions cannot be edited
- Easy to get correct statistical analysis as only latest quotes are listed as live
- Avoid confusion regarding which revision customer/fabricator is referring to
- Convert latest or any previous revision to order
- Avoid manual errors while finalising, as re-entering is not needed

Property Types

It is now possible to create Property type Products. A Property is a kit type of product which constitutes window and door products. Sales Lines for Property products can be added to a Phased Quote, similar to adding one for a standard product.

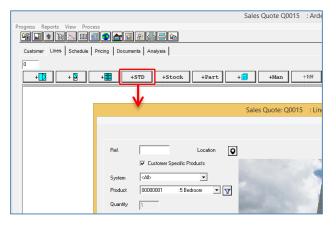
Reports Image: market of the second			
Header Delivery Defaults Special Terms Remote Acces			
Header Delivery Defaults Special Terms Remote Acces			
		Transactions Products	
		000000)1 : Villa B
Door Ctrl+D			
by tha			
Window Ctrl+W	0001	inage	
Property Ctrl+R		Filename FRONT2.JP	3
The Hoperty Carrier			1.5.988
Type Proce	ty		
Format Code Unit			
Costread 35:0	SteenSuppler MTO	ACCESSION AND	
Cost [2486	5	and a second	/
Price [7725]	86		/ nimit
			/ 🏼 📖
	00000001 : Vil	la B	
Header Lines Photo Fronts			
New Edit Reports	Tooks	View	
Curtain Wall +STD +Part +RW Gopen X Delete a Sales Header R	eports - 💫 🆓 Expan	💽 Restore Defaults 🛛 🛕 Print Preview	2
Glass +Stock +Man Ba Copy 🛅 Select All 🖨 Sales Line Repo	arts - Global Changes T Collaps	e 😭 Customise Appearance 🚔 Print	Refresh
Drag a column header here to group by that column			
Line System Long Description Size Qua	ntity Reference Locatio	Nett Status	Referenc
0001 SY01 Casement L.R 1000 x 1000	1	1410.86	1
0002 5Y04 Residoor L 950 x 2100	1	2239.15	1
0003 SY01 Casement L/F.T/F.R/F 1860 x 1200	1	2229.85	1

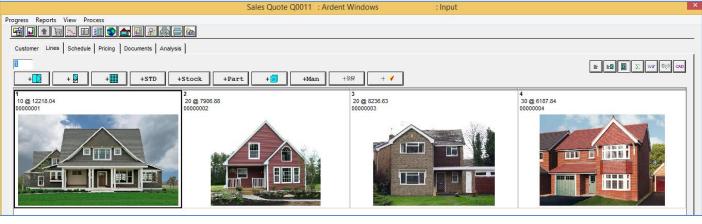


Benefits

- Easy to understand and interpret for the builders.
- Easy for fabricators to re-quote same property to a builder for different sites
- Easy for fabricators to re-quote for the same site (e.g. for government projects) to different builders
- Knowing window-door cost for the property can help builders in pricing the property

		elivery Defaults Special Terms Remote Acc 🔒 🛱 🗈 🗙 🗗 🖓 🗐 😑 💽		n: Products				
	rag a coli ID	umn header here to group by that column Image	Product No.	Description	Long Description	Туре	Cost	Price
•	200001		0000001	А Туре	5 Bedroom	Property	2653.36	11153.
	200002		0000002	В Туре	4 Bedroom	Property	1785.27	7906.8
	200003		0000003	С Туре	4 Bedroom	Property	1619.47	8236.6
	200004		00000004	D Type	3 Bedroom	Property	1515.45	6187.8





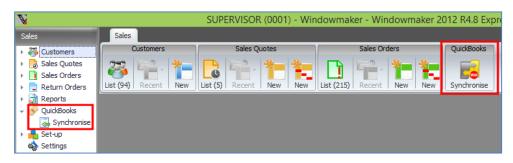


Windowmaker Meadway House,	(Quotation			\setminus
17, Brighton road,					
Surbiton Surrey,					
KT6 5LR UK				WINDO	WMAKER.
Tel. ++44 0208 390 4931 Fax ++44 Email info@windowmaker.com	0208 390 6147				
То		Deliver to			
AGS					
1B Bath Street		1B Bath Stree	et		
Taunton TA1 4ER		Taunton TA1 4ER			
Somerset		Somerset			
Quote No.	Customer Ref.	Quote Date	Date	Responsib	le - Goronwy
Q0029		13-07-2016	13-07-2016		++44 0208 390 493
Sales Line	Details		Qty	Rate	s@windowmaker.co Arnour
0001					
	00000005 5 Bed room		10	10244.24	102442.4
	Pricing - Extras				
	Installation		90	345.00	31050.0
0002	00000006		20	9712.09	194241.8
	4 Bed room		20	9712.09	194241.0
	Pricing - Extras				
	Installation		260	345.00	89700.0
0003	0000007		20	11839.46	236789.2
	4 Bed room		20	11839.46	236789.2
	Pricing - Extras Installation		200	345.00	69000.0
0004	00000008 3 Bed room		30	8244.29	247328.7
	Pricing - Extras Installation		240	345.00	82800.0
		То	tal	£	1053352.1
			andard	17.50 % £	184336.6
		Gr	and Total	£	1237688.7
		1			

Link to QuickBooks

Windowmaker now integrates seamlessly with QuickBooks (desktop version).

Data	Sync direction	Remarks
Customers	Windowmaker $\leftarrow \rightarrow$ QuickBooks	Create customers in either system and
		avoid duplicate entry in the other.
Sales Transactions	Windowmaker \rightarrow QuickBooks	Automatically post the sales transactions
(Invoice, Deposit and		into QuickBooks from Windowmaker to
Credit Notes)		keep the Accounts Receivable up-to-date.



You may choose to trigger synchronisation manually or continuously automatically synchronise. The latter ensures that there is no delay in making the other system up-to-date.

V	QuickBooks	×
Synchronise -		
Once		
C Continuous		
Start		



Windowmaker 2012 R4.7

General Enhancements

Windows 10 SP1 for Windowmaker

Windowmaker 2012 R4.7 onwards is supported to run on Windows 10 SP1 operating system.

Glazing & Glazing Options

It is now possible to set-up up to 2000 Glazing and 2000 Glazing Options, instead of 999 each.

Designs

Designs are now migrated to Windowmaker database and stored in the WMProduct table instead of DAT file. This is part of the drive to abolish any flat file storage and take advantage of the relational database system. Please see <u>Release Notes</u> for full details.

Migration offers additional flexibility to:

- A Maintain translations for each description within the same data
- Replicate designs to Sales Clients

Crystal Reports, Update Status

A status can now be associated with Crystal Reports (whether standard or custom) that can run on a Sales Quote/Order. On generating the report successfully using Print, Export or Email, status of the Quote/Order is automatically updated to this status.

	Report: Sales	Quote: CHRIS	×	General Settings
Report Printer: pdfFactory I Date 15-04-2016	WM_Quotation	General Settings	Settings nange Printer	Save a copy in History Update Status to 3: Order OK OK Ca 1: Input 2: Hold 3: Order OK
Print	Preview (PDF) Export	Export Email	Cancel	4: Acknowld 5: Surveyed 7: Glass ord. 9: Glass rec. 20: Production 25: Glass 27: Cuttion

Payment Terms, Users

The program now allows an External Reference Code, of up to 20 characters, to be added to

- Payment Terms
- Users of type Normal and Client Sales Rep.

When linking to external software (e.g. accounting, ERP) this can be used to map with the corresponding entities.

ID	1				
Description	CWO (Cash Payment with Order)				
Payment Text	On Cash Payment with Order, 10% discount will be provided.				
Settlement Discount %	10.00 External Reference				
Settlement Days	0 Code				
OK Cancel					

S.		User 1	16: Jean
Create Database <u>U</u> se	er		
Header Rights Lim	its		
No.	16		
Name	Jean	Language	English (India) 🗨
Password	**	Show Password	Change Password
Reference			
Salutation 1	Jean		
Salutation 2	Sales Engineer		
Tel.	++44 0208 390 4931		
Email	jean@windowmaker.com	n	
Туре	Client 💌	Sales Rep.	•
Manager	<none></none>	•	
External Reference			
Code			
OK I	Cancel		



Enhancements to Options

Bar Optimisation III

Following functionalities now works for profiles costed using cost matrix:

- Profile Pairing vs. Single Bar
- ▲ Variable bar length optimisation

Entrance Doors

When configuring an entrance door the program now allows filtering the available Door Slabs and Glass Inserts based on catalog ID and name. This effectively enables filtering the list by material, series or any other aspect of the catalog ID and name.

New Option

Multiline Description

The Sales Line multiline text can now be auto-generated using a pre-defined template on the System. The template can contain text as well as 'Merge Fields' (e.g. Glazing, Options & Answers, System, Size etc.). The 'Merge Fields' are automatically replaced with the corresponding values in the Sales Line as and when it is modified.

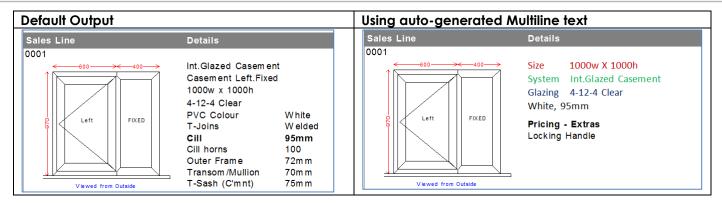
ultiline	text temp	late with Merge Fields	Multiline text generated in Sales Line with merge
		-	values
		System SY01: Int.Glazed Casement	Sales Quote 00000001 : Line 1 : Caseme
Catalog System	<main> SY01</main>	<u> </u>	Options Toolbox Reports
Description	Int. Glazed Casement		Ref. Location Qty. 1 Width 1000 Height 1
	Int.Glazed Casement	Specification Template - Product	System SY01 Int.Glazed Casement Design 22
Type Material	PVC-U	Home Merge Fields	Casement Left Fixed
Frame Depth	0.0	Pate B J U U S 6 X' X A - 9 - 9	4-12-4 Clear Specification - Sales Line: 1 Case
Image: Tax from Custor Mark-up % Coupled Designs Image: Tax from Custor Image: Tax from Custor Image: Tax from Custor Calculate Glass at Pic Calculate Glass at Pic Calculate Glass at Pic	0.00 by List C Ex vie No. 5	Image: Special production I	Home Copy Paste B Paste Special Clipboard Font SP Paste Special Clipboard Font SP Paste Special Clipboard Special
			Size 1000w X 1000h System Int.Glazed Casement Glazing 4-12-4 Clear White, 95mm

This also provides flexibility of printing your own customized Sales line specification on customer documents.

The standard customer documents now provide a Setting to print the auto-generated multiline text.

Include U-value				
Print Thousands Separator		Sizes	<default></default>	•
Detail font size 10 💌		🔲 Sales Line Specificati	on using Multiline Text	
Include Dimensions Internal	•	Suppress Graphics details	: 1	
Include Plan Dimensions / Defaults				







Windowmaker 2012 R4.6

General Enhancements

SQL Server 2014 & 2012

It is now possible to synchronize Sales Client database using SQL Server 2012 & 2014. Earlier this was possible only with SQL Server 2008/2008 R2.

Refer table below for a summary of Windowmaker support to various SQL Server versions.

SQL version	- · · · · · · · · · · · · · · · · · · ·			Windowmaker SQL and Windowmaker ERP		Windowmaker SQL + synched Sales client		
	Now Soon		Now	Soon	Now	Soon		
2005	No	No	Yes	No	No	No		
2008 & R2	Yes	No	Yes	Yes	Yes	Yes		
2012	No	No	Yes	Yes	Yes	Yes		
2014	Yes	Yes	Yes	Yes	Yes	Yes		

Sales Header Numbering

It is now possible to have more control on the Sales Header numbering e.g. enforce automatic numbering for Sales Orders, restrict converting a Quote to an Order with the same number. This can be achieved through appropriate settings on Application Settings \rightarrow Administration \rightarrow Document Numbering.

N Application Settings								
Sales	~	Default Numberin	g					
Survey v		Documents	Automatic	Next No.	Manual	Source		
Junter		Sales Order	Image: A state of the state	J0044				
Manufacturing	~	Sales Quote	 Image: A start of the start of	Q0007				
	_	Return Order	Image: A state of the state	C0002				
Delivery	~	Purchase Order	v	199				
Installation	~	Deposit				 Image: A start of the start of		
		Invoice		000044				
Administration	^	Despatch	 Image: A start of the start of	000179				
Colline								
Settings								
Document Numbering								
Schedule								
OK Ca	incel							

Crystal Reports/Quotation

Windowmaker Quotation now also includes System for each Sales Line.

Product No. for Subsystems

It is now possible to have Product No. length up to 16 characters for Subsystems. For <Main> Systems the limit of 4 characters remains. This allows more logical and intuitive numbering for Subsystems.

Mandatory Fields

Program now allows fields, including user defined fields, to be 'Mandatory From' up to 'Invoiced' status. Earlier this was possible only up to 'In Production' status.



2		0	rder Type 1: Domestic		×			
leader Fie	elds							
🍓 🗙								
Туре		Field	Disable From	Mandatory From				
Sales Lir	ne	Reference	<never></never>	<never></never>				
Sales Lir	ne	Location	<never></never>	<never></never>				
2 Sales O	rder	Road Permit No.	<never></never>	InDespatch	T			
Sales Order		Del. Report No. Invoiced		Description	2			
				QltControl				
				InDespatch				
				Despatched				
				Invoiced	•			
				×				

Enhancements to Options

Entrance Doors

Program now allows using any Door Style and Door Slab as a Sidelite.

Commercial Contracts

Users with Status Update right can now update the status of Phased Orders. However, only Senior Managers are allowed to change status of Phased Orders once Phases have been created.

User Data

User Defined Fields (UDFs) can now be displayed in Sales Lines list.

Sales Order J0048												
	Lines Photo Fronts Work In Progress History											
			New		Ed	lit	Progress	Reports				
Sales Order J0048 Line 1:0			Curtain Wall +STD +Part +RW		🚰 Open 🏅		1~ 2~	📄 Sales Header Reports 🗸	6			
Sales Order J0046	Glass +Stock +Man					🖺 Copy 🛅 Select All		👔 Sales Line Reports 👻	Global Changes			
Drag a column header here to group by that column												
	_	-				et	.					
Floor 2	Line 0001	System SY01	Description Casement T.T/F.T	Size 1999 x 1000	Location Living Room	Floor 2	Nett 1374	1 45				
	0002	SY01	Casement T.T/F.T	2000 x 1000	Living Room	3	1374	.45				
House 209	0003	SY02	Casement L.R.	1000 x 1000	Bedroom2	2	966	Customiz	ation 🛛 🗶			
	0004	SY02	Casement L.R	1000 x 1000	Bedroom2	3	966	5.21 House				
	0005	SY04 Residoor L 9		950 x 2100	950 x 2100 Bathroom		1365		Long Description			
	0006	SY04	Residoor L	950 x 2100	D Bathroom	3	1365					
	0007	SY04	French Door L=R=	2000 x 2100	Entertainmer	nt 2	2008	8.13 Reference 2	Reference 2			
	0008	SY04 French Door L=R=		2000 x 2100	Entertainment 3		2008.13 Status					
Situation Solution B. O. M. Costing Pricing User Data		·						- <u>-</u>				
0 <u>K</u> Cancel												

For Sales Header and Sales Line, it is now possible to select the value of a UDF created using 'nvarchar' SQL data type from a list.

								Sal	es Orders (Liv	/e)	
		Fi	le Edit	View Progress	Reports	Processes	Tools	Help			
		1	a • 🞑 🕼	🚡 🚰 🗈 Copy to	• X 🖾	📑 Sales Ord	ers (Live)	• 0 = =	💽 🥻 🐉 2 : Hol	ld	
	1	🗊 Documents 📓 Other 🕴 Customer Documents (WRP) 🗸 Recalculate Global Changes									
	Sales Order J0048 : Do	Dra	ag a column	header here to grou	p by that colu	nn			-		
Progress Reports View Process			Order ⊽⊻	Name		Dealer			Order Value	St	
Customer Lines Schedule Pricing Documents Analysis User Data											
			10048	Dolphin Windows		A&B Windows			85340.10	0 Inp	
			30041	Ardent Windows	Merlin Wi	indows	656.67	7 Inț			
A 13 1			10039	Imperial Windows	Ardent W	Ardent Windows		4742.18	B Inp		
Architect	Ar. Maradia		10038	Grosvenor Conserv	No. 8. Datar An	Peter Andrews Windows			R Tor		
Dealer	AB09: A&B Windows				•						
	AD00: ASD Windows AB10: Abbey Stained Glass AB11: Aberdeen Joinery AC01: Acorn Fabrications Co Ltd AC02: Aco Glazed Broducts Ltd				Ŷ						



Production/Delivery/Purchase Scheduling

You can now select to ignore the time-lags when a schedule is manually modified. Selecting this will also ignore supplier lead times. This allows you to e.g. schedule a rush order, superceding the time lags and supplier lead times. However, irrespective of this setting, default time-lags will be applied when an order is initially scheduled.

Advanced Production Scheduling

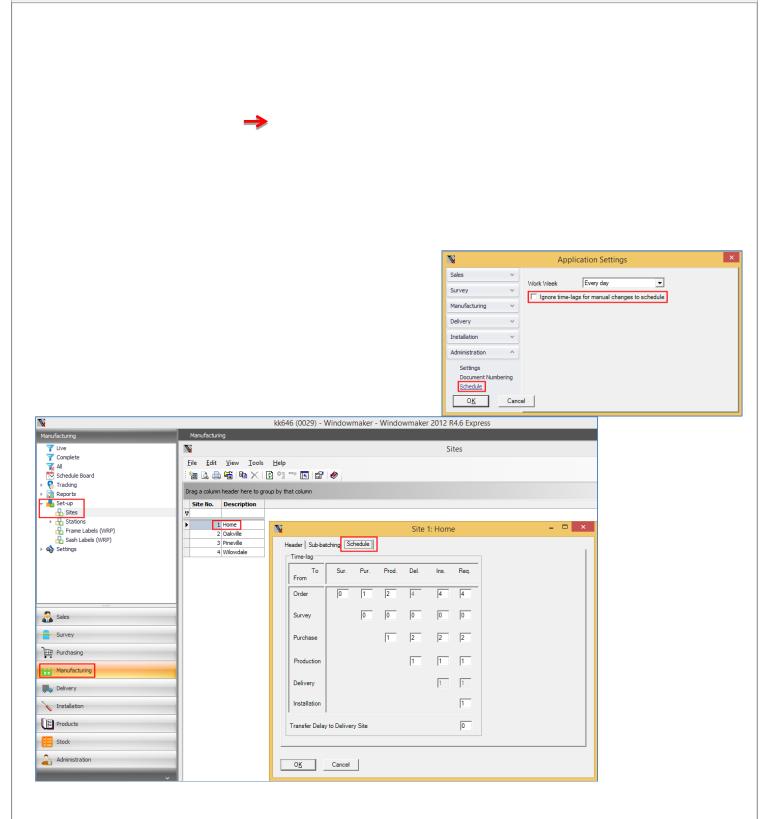
The program now automatically splits an order across Production Batches of the same site and production line if it cannot be accommodated in a single Production Batch. Earlier this would result in a 'Scheduling Failed' error if scheduled from Schedule page of Sales Header or from Schedule Board.

Rescheduling is now possible even if using 'per Batch' Purchases. However in this case quantity of a sales line will not be split across batches.

Multiple Sites

The program now allows to setup Purchase, Production and Delivery time-lags specific to each site.







Scheduling: User Rights

Following user rights are introduced:

User Right		Allows the user to	Remarks
	Input	Schedule an Order not yet scheduled	These rights affect Purchase,
	Change	Manually change schedule of Sales Orders	Production and Delivery scheduling activities. These were earlier
Schedule	View	View the schedule details on the Schedule Boards	controlled by Sales Order rights.
	Delete	Unschedule Purchase/Production/Delivery	
Survey Schedule	Input	Schedule an Order, not yet scheduled, for survey	This was earlier controlled by Survey Schedule – Change rights.
Installation Schedule	Input	Schedule an Order, not yet scheduled, for installation	This was earlier controlled by Installation Schedule – Change rights.

Create Database <u>U</u>ser

General	Input	Change	View	Delete
Costs, Margins		~	~	
Prices		~	~	
Discounts		~		
Customers		v		 Image: A start of the start of
Sales Quotes		 Image: A start of the start of		
Sales Orders/Return Orders		 Image: A start of the start of		
Sales Order Status		 Image: A start of the start of		
Return Order Status		 Image: A start of the start of		
Sales Lines				
Sales Line BOM				
Survey Schedule				
Purchases	~	_	~	
Schedule				
Installation Schedule	~	~	Image: A state of the state	

Link to Saw

Windowmaker can now link to Smart Fab Saw.

Link to Glass Cutting Table

Windowmaker now links to Lisec Glass Cutting Table.

Enhancements to Products

Client (Sales Rep.), Client (Surveyor), Client (Installer)

A Sales Rep., Surveyor or Installer can now work offline and then synchronise the changes with the central Windowmaker database (Possible only for Windowmaker SQL). Earlier this could be done only by Order Entry type Client.

Client		
Client Order Entry Sales Rep. Surveyor Installer	© Employee C Subcontractor	Y



Windowmaker 2012 R4.4/R4.5

General Enhancements

Windows 10 for Windowmaker

Windowmaker 2012 R4 onwards is supported to run on Windows 10 operating system.

Sales Line Price and Discount

- The Price and Discount dialog will now always appear on the Solution page. This also enables freezing Price and/or Discount when required.
- Price and Discount will now be automatically frozen if manually overwritten from the Solution page.

	Salas Order 10057 . June 2. Comment Tap 4.0 / Fined
	Sales Order J0057 : Line 2 : Casement Top^R/Fixed
ogress <u>R</u> eports <u>V</u> iew Proc <u>e</u> ss	Options Icolbox Reports
Fi 🖬 🖈 🐂 🔜 💷 🌒 🌨 🖬 💷 🔐 🏄	▰▦▬
Customer Lines Schedule Costing Pricing Docu	Ref. Location Kitchen V Qty. 1 Width 1000 Height 1000
	System SY01 Int.Glazed Casement V
2	- Design 7 VI Int Glazed Casement V
+ + + + + + STD	
	Casement Top^R/Fixed
1 1000w x 1000h	4-16-4 Clear
1 @ 610.00 Living Room	
	PVC Colour Foil 2S
	Foil 2S The Anogany
	T Joins Welded
	Frame extension
	0uter Frame 272mm 400 Top.♥ Transom/Mullion ● 70mm
	IT-sash (Crant) 75mm
	Flysteren No
	Handle Colour Gold
	Handle Conta Cools Bool
	Handle Type (C) Locking 600
	TH Hinge Type Standard
	Reinforcement Full
	Bead shape Sloped
Price & Discount	Coextruded Bead Yes - Coex
Flice & Discoulit	Gasket Colour Black
Freeze Price Freeze Discount >>	Install, time 0
	Window Board Bull Nose
Description Nett +/-	Board Homs 100
ase 1176.00 0.00	Prod. Site Home
ricing - Extras 619.88 0.00 otal 1795.88 0.00	Drainage Concealed Production Note
0.00 1795.88 0.00	
	Price 1200.00 Discount % 2.00 Viewed from Outside
	Situation Solution B. O. M. (Costing / Pricing /
Price & Discount	

Copying Sales Orders to Quotes

Copying a Sales Order to a Sales Quote will now automatically update the status of the Sales Order to 'Cancelled' (if defined in Application Settings).

Purchase Order

You can now optionally include costs in the Purchase Order. This could be useful to review the Purchase Order internally before placing the order with the supplier.

:	Settings
Stationery Plain	Page Header Print on first page 💌
Top Margin 1	🔲 Window envelope
Logo Size No Logo 💌	Logo Position Top Right 💌
Logo Image	
Viewed from Inside	✓ Include Cost
<u> </u>	ve as Default



Analysis and Marketing reports

All Analysis and Marketing reports can now be generated for a specific Owner i.e. sales person.

Sales	Report	×
► 🚜 Customers		
B Sales Quotes	Report WM_Sales Analysis General Settings Settings	
Figure 1 Sales Orders		
🕨 📄 Return Orders]
👻 🗊 Reports	Printer: CutePDF Writer Change Printer	
👻 📄 Analysis		
WM_New Orders by Period	Invoice Date 17/06/2015 · 17/06/2015	
WM_Sales Analysis	Orthe Trans. D. D. L. L.	
WM_Sales Analysis (Export to Excel)	Order Type 3: Commercial 💌	
💥 WM_Sales Analysis (Pivot Table)	Area 1: Local 💌	
WM_Top N Orders		
WM_Customer Orders Summary	Owner 17: Bob 💌	
WM_Top N Customers	Source (All>	
👻 🚮 Marketing		
WM_Customer Labels		
🕨 📩 Set-up	Print Preview (PDF) Export Export Email Cancel	1
🕨 🏟 Settings		1

Sales Line Header report

Sizes format can now be selected for the Sales Line Header report.

	Report: Sales Order: J0064	: Line 1 : Case	ement Fixed	×
Report	WM_Sales Line Header	Ţ	General Settings	Settings
Printer: Cute	PDF Writer		Settings	×
		Sizes CDefault	Cancel Save as [I Default
Print	Preview (PDF) Export	Export.	Email	Cancel

Additional user rights

User Right	When logged in, the user will only be able to
Restrict Status Change	Update status of a Sales header till it reaches the 'Restrict change from' status.

V	User	17: Bob		
Delete Database User				
Header Rights Limits				
Allow access to				
Departments	<all></all>	•	Progress Reports View Proces	5
Sites	<ali></ali>	•	3 2: Hold) 👉 🖾 🖟
Order Types	<all></all>	•	3 : Order OK	
Area	5: East	•	4 : Acknowl'd	ng Pricing [
Sales Headers				
View at	<al></al>	•	5 : Survey Scheduled	
Restrict change from	5: Survey Scheduled	-	<on stop=""></on>	+ST
View only own (and subor	✓ Restrict Status change dinates)		1 1000w x 1000h 1 @ 749.61	



Easier Answers set-up

For Options, whose answers are not Parts, it is now possible to copy answers:

- And paste them in a spreadsheet for editing.
- From a spreadsheet and paste those on the Answers tab.

This can be very useful to update costs for finish option answers or add new answers.

				3: Foil 2S		0	🗶 🛛 🚽 🗸 (*	~ -		Book	1 - Micr	osoft Exce	el			
ader	Answers Where I	Ised					File Hom	e Insert Pi	age Layout Form	ulas Data	Review	v View	Developer	r Team		
ia 4	i 🖪 🖻 🗙	i 🔡 📸					🗎 🖌 c	alibri - 11	· = = =	Gener	- Ie	Condition	nal Formatting	g × 🔤 Insert	t - Σ	• A
	Abbreviation	Description	Description 2	RGB	Perimeter Cost			B Z U - A			%,	Format as	Table *	Pelet	e • 🗔	, Zr
	MA	Mahogany	Mahogany	75. 3. 0	12.0		Pacte	□ • <u>≫</u> • <u>A</u> •		_		🔜 Cell Styles		Form		Sort &
		Light Oak	Light Oak	230, 150, 30	12.0	20	Clipboard G	Font		• .00 →. ⊡ Numl				Cells		Filter * 1 Editing
3		Golden Oak	Golden Oak	255, 206, 99						ia Numi	per 1a	21	tyles	Cells		calling
		Dark Oak	Dark Oak	140, 75, 40		10	F13	▼ (*	f_x							
				255, 255, 240		00	A B	С	D	E	F	G	н	1	J	K
		Golden Yellow	Golden Yellow	240, 192, 0		00	1 1 MA	Mahogany	Mahogany	75	3	0	12	0	0	0
				192, 192, 192		20	2 2 1.0	Light Oak	Light Oak	230	150	30	12	0	0	0
		Dark Brown	Dark Brown	47, 47, 0		10	3 3 GO	Golden Oak	Golden Oak	255	206	99	12	0	0	0
		Maroon	Maroon	144, 0, 0			4 4 DO	Dark Oak	Dark Oak	140	75	40	12	0	0	0
10	DB	Dark Blue	Dark Blue	0, 47, 95	12.0	00	5 5 IV	Ivory	Ivory	255	255	240	12	0	0	0
							6 6 GY		w Golden Yellow	233	192	240	12	0	0	0
							7 7 GR	Gray	Grav	192	192	192	12	0	0	0
							8 8 DB	Dark Brown	Dark Brown	47	47	192	12	0	0	
																0
							9 9 MR 10 10 DB	Maroon Dark Blue	Maroon Dark Blue	144	0 47	0 95	12 12	0	0	0
2				3: Foil 2S			AB	C	D	E	₽	G	Н	1	1	к
S.				3: FOII 25		1		Mahogany	Mahogany	- 75	. 3	0	13.2	0	0	
leader	Answers Where														•	
	Anawers where	Used				1 2	210			230	150	30			0	0
1						2		Light Oak	Light Oak	230	150	30	13.2	0	0	0
	i 🖬 🖻 🗙	1 🗟 📸	Description 2	RGB	Perimeter Cost	3	3 GO	Light Oak Golden Oak	Light Oak Golden Oak	255	206	99	13.2 13.2	0	0	0
ID		Description	Description 2	RGB	Perimeter Cost	3	3 GO 4 DO	Light Oak Golden Oak Dark Oak	Light Oak Golden Oak Dark Oak	255 140	206 75	99 40	13.2 13.2 13.2	0 0 0	0	0
ID	Abbreviation	1 🗟 📸	Description 2 Mahogany Light Oak	RGB 75, 3, 0 230, 150, 30	Perimeter Cost 13.1 13.1	20 3 20 5	3 GO 4 DO 5 IV	Light Oak Golden Oak Dark Oak Ivory	Light Oak Golden Oak Dark Oak Ivory	255 140 255	206 75 255	99 40 240	13.2 13.2 13.2 13.2 13.2	0 0 0 0 0	0 0 0	0 0 0
ID 1	Abbreviation	Description Mahogany	Mahogany	75, 3, 0	13.3	20 5 20 6	3 GO 4 DO 5 IV 6 6 GY	Light Oak Golden Oak Dark Oak Ivory Golden Yellow	Light Oak Golden Oak Dark Oak Ivory Golden Yellow	255 140 255 240	206 75 255 192	99 40 240 0	13.2 13.2 13.2 13.2 13.2 13.2	0 0 0 0 0 0 0 0	0 0 0 0 0	0 0 0 0
10 1 2	Abbreviation MA LO	Description Mahogany Light Oak	Mahogany Light Oak	75, 3, 0 230, 150, 30	13.3	3 20 20 20 20 20	3 GO 4 DO 5 IV 6 GY 7 GR	Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray	Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray	255 140 255 240 192	206 75 255 192 192	99 40 240 0 192	13.2 13.2 13.2 13.2 13.2 13.2 13.2	0 0 0 0 0 0	0 0 0 0 0 0 0	0 0 0 0
ID 1 2 3	Abbreviation MA LO GO	Description Mahogany Light Oak Golden Oak	Mahogany Light Oak Golden Oak	75, 3, 0 230, 150, 30 255, 206, 99	13.1 13.1 13.1	3 20 20 20 20 20 20 20 20 8	3 GO 4 DO 5 IV 6 GY 7 GR 8 DB	Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown	Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown	255 140 255 240 192 47	206 75 255 192 192 47	99 40 240 0 192 0	13.2 13.2 13.2 13.2 13.2 13.2 13.2 13.2	0 0 0 0 0 0 0	0 0 0 0 0 0	0 0 0 0 0
ID 1 2 3 4	Abbreviation MA LO GO DO	Description Mahogany Light Oak Golden Oak Dark Oak	Mahogany Light Oak Golden Oak Dark Oak	75, 3, 0 230, 150, 30 255, 206, 99 140, 75, 40	13.1 13.1 13.1 13.1 13.1 13.1	3 20 20 20 20 20 20 20 20 8 20 9	 3 GO 4 DO 5 IV 6 GY 7 GR 8 DB 9 MR 	Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown Maroon	Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown Maroon	255 140 255 240 192 47 144	206 75 255 192 192 47 0	99 40 240 0 192 0 0	13.2 13.2 13.2 13.2 13.2 13.2 13.2 13.2	0 0 0 0 0 0 0 0 0	0 0 0 0 0 0 0	0 0 0 0 0 0
ID 1 2 3 4 5	Abbreviation MA LO GO DO IV	Description Mahogany Light Oak Golden Oak Dark Oak Ivory	Mahogany Light Oak Golden Oak Dark Oak Ivory	75, 3, 0 230, 150, 30 255, 206, 99 140, 75, 40 255, 255, 240	13. 13. 13. 13. 13. 13. 13.	3 20 20 20 20 20 20 20 20 20 8 20 9	3 GO 4 DO 5 IV 6 GY 7 GR 8 DB	Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown	Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown	255 140 255 240 192 47	206 75 255 192 192 47	99 40 240 0 192 0	13.2 13.2 13.2 13.2 13.2 13.2 13.2 13.2	0 0 0 0 0 0 0	0 0 0 0 0 0	0 0 0 0 0
ID 1 2 3 4 5 6	MA GO DO IV GY	Description Mahogany Light Oak Golden Oak Dark Oak Ivory Golden Yellow	Mahogany Light Oak Golden Oak Dark Oak Ivory Golden Yellow	75, 3, 0 230, 150, 30 255, 206, 99 140, 75, 40 255, 255, 240 240, 192, 0	13. 13. 13. 13. 13. 13. 13. 13. 13. 13.	3 20 20 20 20 20 20 20 20 20 20 20 20 20	 3 GO 4 DO 5 IV 6 GY 7 GR 8 DB 9 MR 	Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown Maroon	Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown Maroon	255 140 255 240 192 47 144	206 75 255 192 192 47 0	99 40 240 0 192 0 0	13.2 13.2 13.2 13.2 13.2 13.2 13.2 13.2	0 0 0 0 0 0 0 0 0	0 0 0 0 0 0 0	0 0 0 0 0 0
ID 1 2 3 4 5 6 7	Abbreviation MA LO GO DO IV GY GR	Colden Cak Dark Oak Dark Oak Ivory Golden Yellow Gray	Mahogany Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown Maroon	75, 3, 0 230, 150, 30 255, 206, 99 140, 75, 40 255, 255, 240 240, 192, 0 192, 192, 192	13. 13. 13. 13. 13. 13. 13. 13. 13. 13.	3 20 20 20 20 20 20 20 20 20 20 20 20 20	3 GO 4 DO 5 IV 6 GY 7 GR 8 DB 9 MR 0 10	Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown Maroon Dark Blue	Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown Maroon Dark Blue	255 140 255 240 192 47 144 0	206 75 255 192 192 47 0 47	99 40 240 0 192 0 0 0 95	13.2 13.2 13.2 13.2 13.2 13.2 13.2 13.2	0 0 0 0 0 0 0 0 0 0 0 0	0 0 0 0 0 0 0 0	0 0 0 0 0 0 0 0
ID 1 2 3 4 5 6 7 8	Abbreviation MA LO GO IV GY GR DB	Contemporation Contem	Mahogany Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown Maroon Dark Blue	75, 3, 0 230, 150, 30 255, 256, 99 140, 75, 40 255, 255, 240 240, 192, 0 192, 192, 192 47, 47, 0 144, 0, 0 0, 7, 95	13. 13. 13. 13. 13. 13. 13. 13. 13. 13.	3 20 20 20 20 20 20 20 20 20 20 20 20 20	3 GO 4 DO 5 IV 6 GY 7 GR 8 DB 9 MR 0 10 1 LB	Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown Maroon Dark Blue Light Blue	Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown Marcon Dark Blue Light Blue	255 140 255 240 192 47 144 0 85	206 75 255 192 192 47 0 47 116	99 40 240 0 192 0 0 0 95 181	13.2 13.2 13.2 13.2 13.2 13.2 13.2 13.2	0 0 0 0 0 0 0 0 0 0 0		0 0 0 0 0 0 0 0 0
ID 1 2 3 4 5 6 7 8 9 10 11	Abbreviation MA LO GO DO IV GY GR CR CR DB MR NR DB LB	Description Mahogany Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown Maroon	Mahogany Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown Maroon	75, 3, 0 230, 150, 30 255, 206, 99 140, 75, 40 255, 255, 240 240, 192, 0 192, 192, 192 47, 47, 0 144, 0, 0	13. 13. 13. 13. 13. 13. 13. 13. 13. 13.	3 20 20 20 20 20 20 20 20 20 20 20 20 20	3 GO 4 DO 5 IV 6 GY 7 GR 9 MR 0 10 11 LB 2 12	Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown Maroon Dark Blue Light Blue Light Green	Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown Maroon Dark Blue Light Blue Light Green	255 140 255 240 192 47 144 0 85 123	206 75 255 192 192 47 0 47 116 160	99 40 240 0 192 0 0 95 181 54	13.2 13.2 13.2 13.2 13.2 13.2 13.2 13.2	0 0 0 0 0 0 0 0 0 0 0 0		0 0 0 0 0 0 0 0 0 0 0
ID 1 2 3 4 5 6 7 8 9 10 11 12	Abbreviation MA LO GO DO UV VV GY GR GR DB MR DB LB LG	Construction C	Mahogany Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown Maroon Dark Blue Light Blue Light Green	75, 3, 0 230, 150, 30 255, 255, 266, 99 140, 75, 40 255, 255, 240 240, 192, 0 192, 192, 192 47, 47, 0 144, 0, 0 0, 47, 95 55, 116, 181 123, 160, 54	13: 13. 13. 13. 13. 13. 13. 13. 13. 13. 13.	3 20 20 20 20 20 20 20 20 20 20 20 20 20	 3 GO 4 DO 5 IV 6 GY 7 GR 8 DB 9 MR 10 DB 11 LB 12 LG G 13 LB 4 14 DR 	Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown Maroon Dark Blue Light Blue Light Green Light Green Light Rown Dark Red	Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown Dark Blue Light Blue Light Blue Light Reren Light Rerem Dark Red	255 140 255 240 192 47 144 0 85 123 170 194	206 75 255 192 192 47 0 47 116 160 125 59	99 40 240 0 192 0 0 95 181 54 83 12	13.2 13.2 13.2 13.2 13.2 13.2 13.2 13.2	0 0 0 0 0 0 0 0 0 0 0 0 0 0		0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
ID 1 2 3 4 5 6 7 8 9 10 11 12 13	Abbreviation MA LO GO DO IV GY GR CR CR DB MR NR DB LB	Description Mahogany Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown Maroon Dark Blue Light Blue	Mahogany Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown Maroon Dark Blue Light Blue	75, 3, 0 230, 150, 30 255, 206, 99 140, 75, 40 255, 525, 240 240, 192, 0 192, 192, 192 47, 47, 0 144, 0, 0 9, 47, 95 55, 116, 181	13. 13. 13. 13. 13. 13. 13. 13. 13. 13.	3 20 20 20 20 20 20 20 20 20 20 20 20 20	 3 GO 4 DO 5 IV 6 GY 7 GR 8 DB 9 MR 10 DB 11 LB 12 LG 3 13 LB 	Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown Maroon Dark Blue Light Blue Light Brown	Light Oak Golden Oak Dark Oak Ivory Golden Yellow Gray Dark Brown Marcon Dark Blue Light Blue Light Green Light Brown	255 140 255 240 192 47 144 0 85 123 170	206 75 255 192 192 47 0 47 116 160 125	99 40 240 0 192 0 0 95 181 54 83	13.2 13.2 13.2 13.2 13.2 13.2 13.2 13.2	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0		0 0 0 0 0 0 0 0 0 0 0 0 0 0

Enhancements to Options

Customer Special Terms

- If not already migrated, are now migrated to Windowmaker database and stored in the WMCustomerSpecialTerm table.
- ▲ Can now be used to apply discounts for all or a subset of customers of a specific Order Type.
- Can now be used to restrict availability of Systems on order entry.

Customer Special Term	×	1	V		Custome	r Special Terms		×
Gustomer Account Order Type 3: Commercial				View Iools		•		
Product			Account	header here to gr Order Type	oup by that co	Product Applicable	Discount %	
			▶	Commercial Domestic	D C			
C Discount 0.0 %		-	 AB01	Trade Trade			30.00	
			AB01	Trade	EX01	V	35.00	

Refer 'Special Terms' topic in the help file for details.



Production Scheduling

Schedule Singly

It is now possible to run Schedule Singly facility on multiple Sales Orders. Each of the selected Sales Order will be 'scheduled singly'.

		ther Customer Documents (WRP		,			13				
		to group by that column					Schedule Singly				
Order '		Name	Cust. Ref.	Status	Order Date						_
			-				8		Schedule !	Singly -	
0049	AF01	Afton Green Ltd		Input		_11		here to group by that column			
0048	AB01	A B Company Ltd		Glass rec.	02/07/2015		-				
0047 0046	AAA002 AAA000	Famous Glass - Branch 2 Famous Glass		Input	02/07/2015		Reference 30049	Customer AF01: Afton Green Ltd	Result Pending	Message	
0045	AA000	AA Glazing		Input			30048	AB01: A B Company Ltd	Pending		
0045	AA03 AA02	AA Glazing AA Insulations Ltd		Glass rec. Input	02/07/2015		J0045	AA03: AA Glazing	Pending		
0043	AA02 AA01	Ardent Windows		Glass rec.	02/07/2015		J0043	AA01: Ardent Windows	Pending		
0039	IM01	Imperial Windows		Input	22/12/2010						
1038	GR01	Grosvenor Conservatories Windows &		Innut	30/11/2010	-					
						=					
									0%		
							Start		0%		
							Start		0%		
							Start		0%		
						[Start		0%	Singly -	
							S	here to group by that column	ļ	Singly –	
							S	here to group by that column Customer	ļ	Singly –	
							Drag a column header		Schedule S	, .	
							Drag a column header	Customer	Schedule S	Message Sales Order 30049 is successfully scheduled in F Bach 1/30049. Production Batch 1/30049 is not finalised. Sales Order 30048 is successfully scheduled in F Batch 1/30048.	Production
							Drag a column header	Customer AF01: Afton Green Ltd	Schedule S Result Done	Hessage Sales Order 10049 is successfully scheduled in F Batch 1/0049. Producton Batch 1/0049 is not finalised. Sales Order 10048 is successfully scheduled in F Batch 1/0048. Sales Order 30045 is successfully scheduled in F Batch 1/10045.	Production Production Production
						4 	Drag a column header Reference 10049 10048	Customer AF01: Afton Green Ltd AB01: A B Company Ltd	Schedule S Result Done Done	Message Sales Order 30049 is successfully scheduled in F Batch 1/30049. Production Batch 1/30049 is not finalised. Sales Order 30048 is successfully scheduled in F Batch 1/30048. Sales Order 30045 is successfully scheduled in F	Production Production Production
						4 	Drag a column header Reference 30049 30048 30045	Customer AF01: Afton Green Ltd AB01: A B Company Ltd AA03: AA Glazing	Schedule S Result Done Done Done	Message Sales Order 10049 is successfully scheduled in F Batch 1/10049 Production Batch 1/30049 is not finalised. Sales Order 10048 is successfully scheduled in F Batch 1/30048. Sales Order 10045 is successfully scheduled in F Batch 1/30045.	Production Production Production
						4 	Drag a column header Reference 30049 30048 30045	Customer AF01: Afton Green Ltd AB01: A B Company Ltd AA03: AA Glazing	Schedule S Result Done Done Done	Message Sales Order 10049 is successfully scheduled in F Batch 1/10049 Production Batch 1/30049 is not finalised. Sales Order 10048 is successfully scheduled in F Batch 1/30048. Sales Order 10045 is successfully scheduled in F Batch 1/30045.	Production Production Production

Installation Scheduling

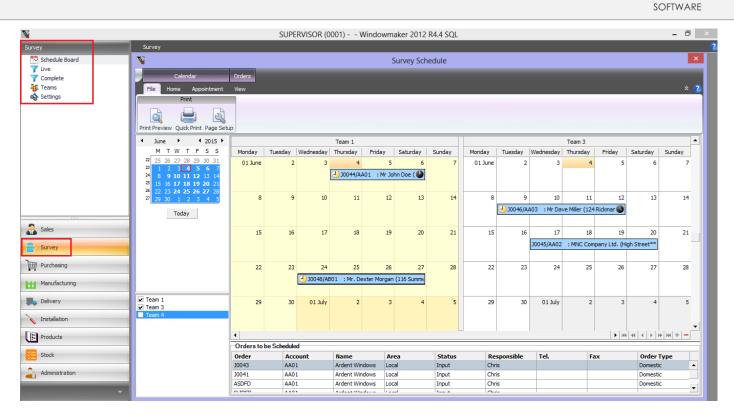
Includes Survey Scheduling

Installation Scheduling Option is now 'Survey and Installation Scheduling' option.

Survey Scheduling

Under survey scheduling you can:

- ▲ Set-up surveyors as Users.
- Set-up Survey Teams including Surveyors. The total capacity of the Survey Team per day can be specified. A Survey Team could be for a specific Area.
- ▲ Grant rights to Users to schedule or reschedule/unschedule Sales Orders for survey.
- Schedule a Sales Order for survey. When scheduling the program will
 - 1. Calculate the duration required to carry out the survey based on capacity required by the Sales Order and the capacity/day defined for a Survey Team.
 - 2. Offer empty slots with the required duration for all Survey Team(s) with matching Area. The Sales Order can be scheduled in one of the slots.
- Monitor and manage schedule via the Survey Teams' calendars using the Survey Schedule Board.



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Installation Teams

It is now possible to calculate the duration required to complete the installation of a Sales Order. For this:

- Select 'Installation Capacity' approach as 'Capacity of Part No.'.
- Specify total installation capacity per day of an Installation team. This can be specified in pre-determined units e.g. no. of windows that the team can install, available minutes (e.g. If the team has 2 members then considering 6 hour day the team's capacity can be 2 x 360 = 720 minutes).
- Write rules to calculate the capacity required for a window/door.

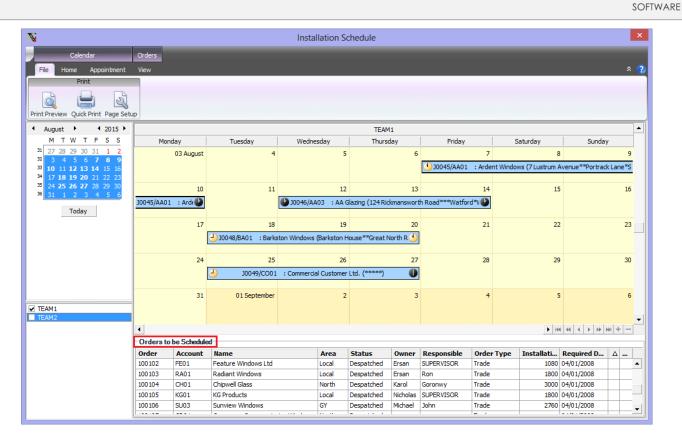
Duration (Days: Hours) = Required capacity for the Sales Order / Capacity per day of an Installation Team.

	N	Application Settings	×
	Sales 🗸	Calendar	
	Survey ~	Work Week Every day	-
	Manufacturing ~	Default Start-End time 09:00 - 18:00	-
	Delivery 🗸	Installation Capacity	
Normalization Team TEAM1: FOR INSTALLATION P	Installation ^	C Input per Sales Order C Capacity of Part No. 1851: Ins Capacity	•
Team TEAM1 🔽 Active	Schedule		
Description FOR INSTALLATION PURPOSE	Administration ~		
Area 0: <all></all>			
Member 225 : William, 226 : Ron 👻			
Capacity 720			
OK Cancel	O <u>K</u> Cancel		

Installation Schedule Board

The Installation Schedule Board now includes:

- Orders to be Scheduled list which displays Sales Orders that are pending for Installation Scheduling. These can be directly scheduled by dragging and dropping them on the relevant team calendar.
- Orders View which displays the date-wise team-wise list of Sales Orders that are already scheduled for installation.



WINDOWMAKER*

V							Installa	ation S	Schedule							
Calendar File Home Appointment	Oro Vie	ders :w														
Print	q															
▲ August ▶ ▲ 2015 ▶		am		escription		Capacity	/									
MTWTFSS	<u> </u>	TEAM			TION PURPOSE		8							_		
³¹ 27 28 29 30 31 1 2 ³² 3 4 5 6 7 8 9		Ord	ier 10048	Account BA01	Name Barkston Win	Area Local	Status	molete	Installation S 18/08/2015	otart	20/08/2		Required Date 21/08/2015	Te	21.	
33 10 11 12 13 14 15 16			10049		Commercial C		Production		25/08/2015		27/08/2		28/08/2015			
³⁴ 17 18 19 20 21 22 23 ³⁵ 24 25 26 27 28 29 30			10046		AA Glazing	Local	Production		12/08/2015		14/08/2		15/08/2015	-		
³⁵ 24 25 26 27 28 29 30 ³⁶ 31 1 2 3 4 5 6		- J	10045	AA01	Ardent Windows	Local	Under Sur	vey	07/08/2015		10/08/2	015	11/08/2015	-		
			Line	Descripti	ion	Ref	ference	Locat	tion	Size		System	Quantity			
Today			0001	Casement		W1		Dining	Room		x 1000		1			
		- I-	0002		Top^R/Fixed	W2		Stairs				SY01	1			
		- I-	0003	Horizontal		W3		Bedroo				SYHS	1			
		- I-	0004	Horizontal		W4		Bedroo				SYHS	1			
			0005	Residoor L	Silder	D1		Bedroo			x 1000 x 2100	SY04	1			
			0007	Residoor L		D1		Bedroo			x 2100	SY04	1			
		L -	0008	Residoor L		D3		Bedroo				SY04	1			
	\vdash															
2 TEAM1 TEAM2																

Installation department

A List view is now available in the Installation department, this can be used to:

- ▲ View all the Sales Orders whose Status is >= In Despatch i.e. ready for installation.
- Update status of such Sales Orders.
- Run installation reports.



Installation	Installation						
tist Constant Schedule Board Settings			List ogress <u>R</u> eports <u>T</u> ools <u>H</u> elp				×
	🗄 📄 Docume	ents 📄 O	by to → X 💽 ⊕ 🚆 📼 💽 🚧 t ther to group by that column	84: Invoiced	• 🖻	0	
	Order ∇	Account	Name	Order Value	Status	Area	
	₽						_
	► EXTRAS	AA02	AA Insulations Ltd	227.33	Despatched	Local	
	100125	CH01	Chipwell Glass	4207.09	Despatched	North	
	100124	GR02	AGR Windows Ltd	3212.91	Despatched	North	
	100123	RA01	Radiant Windows	4180.01	Despatched	Local	
	100122	FE01	Feature Windows Ltd	4864.46	Despatched	Local	
	100121	GR01	Grosvenor Conservatories Windows &	6615.17	InDespatch	North	
•	100120	NE01	Newent Windows	7487.13	InDespatch	West	
Sales	100119	ME01	Merlin Windows	4940.56	Despatched	South	
Survey	100118	SE02	SEA Aluminium	3337.13	Despatched	Local	
	100117	CH01	Chipwell Glass	4413.27	Despatched	North	
Purchasing	100116	RA01	Radiant Windows	4126.06	Despatched	Local	
	100115	GR02	AGR Windows Ltd	4323.94	Despatched	North	
Manufacturing	100114	SU03	Sunview Windows	4858.42	Despatched	GY	
Delivery	100113	FE01	Feature Windows Ltd	5034.60	Despatched	Local	
<u>.</u>	100112	GR01	Grosvenor Conservatories Windows &	4391.48	Despatched	North	
Installation	100111	NE01	Newent Windows	7056.89	InDespatch	West	
Products	100110	AB01	A B Company I td	8309.37 137115.79	InDespatch	South	-



Link to LogiKal

Additional items added in LogiKal Sales Lines can now be imported and mapped as Pricing Extras in Windowmaker.

Note: This is available if you have 'Pricing Extras' Option in your licence.

N			Application Setting	S
Sales	~	✓ Application Setup		
Survey	~	Costhead Mapping		
Manufacturing	~	Where not specified it w	veen LogiKal Article types and Costhe rill use the mapping defined for 'Other for 'Other' then BOM for any unmappe	Article type
Delivery	~			a ratio o types and not be imported.
Installation	~			
		LogiKal ArticleTyp	e Costhead	Pricing Extras Costhead
Administration	^	Insulated profile	Main profiles	<none></none>
Settings		Uninsulated profile	Ancillary profile	<none></none>
Document Numbering		Gasket	Gaskets	<none></none>
Link to LogiKal		Connector	Fitting Supplier 1	<none></none>
Schedule		Accessories (Length)	Accessories	<none></none>
		Accessories (pieces)	<none></none>	Pricing - Extras2
		Tool	Fitting Supplier 1	<none></none>
		▶ Glazing	Glass -supplier 1	<none></none>
		Labour	Fabricat'n labour	<none></none>
		Other	<none></none>	Pricing - Extras1
		Refresh		

	Quote No. Q0021	Customer Ref.		ote Date -07-2015	Date 27-07-2015
	Sales Line	Detalls		Qty Rate	Amount
Windowmaker Quotation		1;A 000 x 1000h	et system	1 562.96	562.96
		Alum.Brite Kote 180		1 7.66	7.66
		Cover kit 2100 mm Pres.Plate pun 140mm Pricing - Extras Subtotal		1 127.62 1 13.41	127.62 13.41 148.69
			Total		£ 711.65
Position Quantity Description		Price Total [£] [£]	VAT Grand Tota	20.00 %	£ 142.33 £ 853.98
001 1 Pcs		711.65 711.65	Carana rota		2 000.00
RH a Fixed Sash System: Sch Colours; Profiles: Pre- Glazing: 2 x 2 k mm 6 Profiles: Frame: 66.5 Mullion/Trame: 66.5	som: 115 mm t: 34 mm, 34 mm dware: I PARTS	em 1	LogiKa Quotat		
Grand Total Net		£ 711.65			



New Products

Survey Client

Survey Client enables Surveyors to:

- Monitor and/or manage survey schedule for their teams (If Installation and Survey Scheduling option is available).
- Record survey details (If Surveying option is available).

Using a Survey Client a Surveyor can

- Work online by connecting to the central Windowmaker database.
- Work offline and then synchronise the changes with the central Windowmaker database. (Possible only for Windowmaker SQL).

This enables a surveyor to directly record survey details in Windowmaker using a device like tablet computers (e.g. Microsoft Surface Pro), tablet devices (e.g. iPad, Nexus 10, Nexus 7, Samsung Tab etc.) or even smartphones.

N				Geor	ae (0021)) Wind	lowmaker	2012 R4 4 9	QL - Sales Client				- 8 ×
Survey	Sur	vey		Geor	ge (0021)) Wind	ownaker	2012 14.4 5	iqu - Sales Client				2
Schedule Board			_	_	_	_	_	_	Survey (Live)			_	×
Vive Complete	Eile	Q, 🖨 9	🔒 🖻 Copy	gress <u>R</u> epor	Surve			7 : Surve	y Complete •				
			1 -	group by that									
	Ballon and		Account		Statu	us	Order Date	Area					
	↓ 30	051 A	A01 /	Ardent Windows	: Under	Survey 1	10/07/2015	Local					
	- 3	V			1.			Rec	ord Survey Sizes				×
	-	Tolerance	Limit : 10 mn	n R	ound survey	/ sizes down	to : 2 mm						
				here to group b			Comment					Calculation	Dending
		Line 9	System	Width	Height	Width	Height	Reference	Location	Mirror	Installation Note	Results	Survey
		0001	SY01	1500	1200	1504	1200	W1	Bedroom 1				
		0002	SY01	1500	1200				Bedroom 2				
		0003	SY01	1500	1200				Bedroom 3	V		_	
		0004	SY01 SY01	1500	1200				Stairs Hall		Window access difficult - too high		
		0005	SY04	1500	1200 2100				Bedroom 1			-	
		0008	SY04	950	2100				Bedroom 2				
		0009	SY04	950	2100				Bedroom 3				
		0010	SY04	950	2100				Hall	~	Take care of cables		
Survey		▶ 0006	SY01	1000	1000	998	998	WO	Kitchen				
Administration													
~													
📋 💿 💁 🖬	1		W	S	01N	B.					- N 🕅	P 22 😘	ENG 16:34 14/07/2015

Installer Client

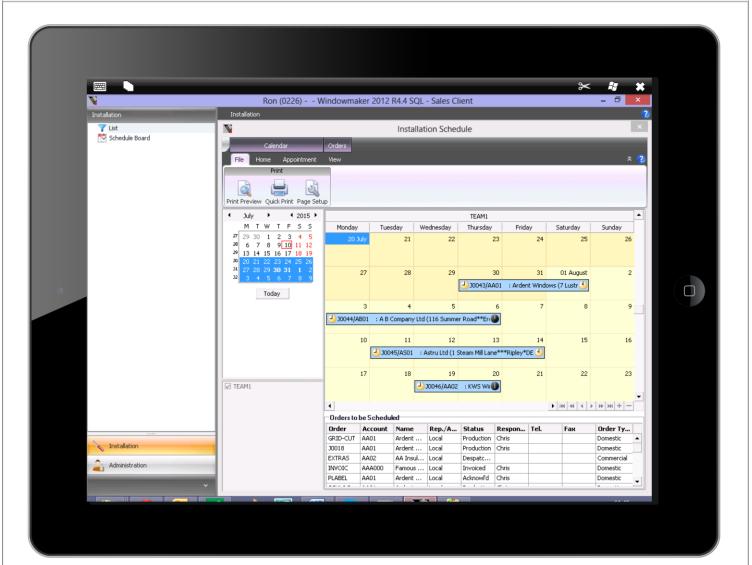
Installer Client enables Installers to:

 Monitor and manage installation schedule for their teams (If Installation and Survey Scheduling option is available)

Using an Installer Client an Installer can

- ▲ Work online by connecting to the central Windowmaker database.
- Work offline and then synchronise the changes with the central Windowmaker database. (Possible only for Windowmaker SQL).







Windowmaker 2012 R4.2

General Enhancements

Support to SQL Server 2012 and 2014

Windowmaker now supports the following:

- SQL Server 2014
- SQL Server 2012

Refer table below for a summary of Windowmaker support to various SQL Server versions. Note that Synchronization with Sales Client works only with SQL Server 2008/2008 R2.

SQL version		r Express, Windowmaker nd Windowseller		maker SQL and owmaker ERP	Windowmaker SQL + synched Sales clien		
	Now	Soon	Now	Soon	Now	Soon	
2005	No	No	Yes	No	No	No	
2008 & R2	Yes	No	Yes	Yes	Yes	Yes	
2012	No	No	Yes	Yes	No	Yes	
2014	Yes	Yes	Yes	Yes	No	Yes	

Separate Area and Rep records

Until now the Rep./Area could be used to represent either a Rep or an Area. Now

- Rep./Area is renamed to Area.
- Reps can be set-up as Windowmaker Users of type 'Normal' or 'Sales Client Representative'. A Rep can be selected as an Owner on Customer and Sales Header records.

Order Type	1: Domestic	•		Area	Dite North	
<u>R</u> ep./Area	21: North	•		Owner	21: North 102: David	
R <u>e</u> sponsible	<none></none>	•	T	B	102. Duvid	

Restricting access to Sales Headers and Customers

It is now possible to

- Restrict Sales Representatives to access only Customers and Sales Headers owned by them.
- Assign Manager for Sales Representatives. Managers can access Customer and Sales Headers owned by them or their subordinates.

W	User 17: BOD	1			
Delete Database <u>U</u> s	er				
Header Rights Lin	nits		i		
No.	17		V		
Name	Bob Language English	•	Delete Database User		
Password	Show Password Cha	nge Password	, Delete Database <u>o</u> ser		
Reference			Header Rights Limits		
Salutation 1	Bob Lawrence				
Salutation 2			Allow access to		
Tel.	+44 (0)20 8390 4931		Order Types	Domestic, Commercial	
Email	bob@Windowmaker.com		A		
Туре			Area	1: Local	
Sales Client	Manager David	_	Sales Headers		
Sales Client			View at	<all></all>	
Convector	© Employee		Restrict change from	0: <none></none>	
Representation	C Subcontractor	*			
Corder Entry			View only own (and	subordinates)	
☐ Installer					

Refer "How to restrict users to only view their own Sales Headers and Customers?" in the help file for details.



Manufacturing

An Order can now be released for manufacturing directly from the Sales Order list. This is particularly useful if orders are manufactured one at a time, for remakes, replacements or rush orders.

						2		Production Batch	J0044 2	7/05/2015		
					S	elect Sales <u>C</u>	<u>)</u> rders <u>F</u> ile <u>P</u> rogres	s <u>R</u> eports Pro <u>c</u> esses	Tools H	elp		
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1		Sales	Orders (Live))		Header Co	ntents Purchases					
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 *= D. A		py to 🔹 🗙 👔 📋 Sales Orders (L		□ 3 4 2 •		Batch No.	J0044					
	_					Date	27/05/2	015 🔹				
🗊 Docum	ients 词 O	ther Customer Documents (WRP	P) → Recalculat	e Global C	ure Singly 👳		,					
Drag a columr	header here	to group by that column				Capacity/B						
Order	Account		Order Value	Chabus		Bottlene	ck Maximum	n Allocated	7 Co	nsumption 100.00%	Free	0
Urder	Account	Name	Order value	Status	-	V-notch		0	0	0.00%		0
4					-	Drainage		4	4	100.00%		0
J0044	WM01	Windowmaker Software	54698.00	Input	_	Endmilling		0	0	0.00%		0
SLIDER	AA01	Ardent Windows	1395.15	Input		Door BN		0	0	0.00%		0
TIMBER	EA01	Easiglaze Ltd	3.24	Input		Window BN Memo	N 1	20	20	100.00%		0
ASDFD	AI01	Airlock Double Glazing	1.84	Input		Memo						
J0041	DO01	Door & Windows Systems Ltd	656.67	Input								
GRID-CUT	HB01	HB Joinery Manufacturers	3279.50	Production								
30039	AB06	Absurdly Priced Windows	4721.78									
30038	MB01	MBS Window Systems indows &										
COLORDB	CM01	Local Contractor	2091.48		-							
J0024	EA01	Easiglaze Ltd	1155.20		<u> </u>							
			3136433.04			OR	Cancel					

Refer "How to release Single Sales Orders for manufacturing" topic in the help file for details.

Enhancements to Options

Production Scheduling

It is now possible to schedule an Order in its own exclusive Production Batch and/or Delivery (if using Delivery Scheduling) directly from the Sales Order list. If the Order is already scheduled then it will be moved to its own exclusive Production Batch and/or Delivery, maintaining its schedule. This is particularly useful if orders are manufactured one at a time, for remakes, replacements or rush orders.

			rogress <u>R</u> eports Pro <u>c</u> esses <u>T</u> r py to • 🗙 😨 🛅 Sales Orders (L ther 🗄 Customer Documents (WRP				• 🗃 🥏
D	rag a column	header here	to group by that column	,			
	Order ∇	Account	Name	Order Value	Status	Rep./Area	
Ŷ							
۲	30050	AA01	Ardent Windows	610.00	Input	Local	
	30049	AA01	Ardent Windows	4332.94	Acknowl'd	Local	
	30048	AB01	A B Company Ltd	2461.00	Input	South	
	J0047	AA01	Ardent Windows	4094.43	Acknowl'd	Local	
	SLIDER	AI01	Airlock Double Glazing	1395.15	Input	Local	
	TIMBER	DO01	Door & Windows Systems Ltd	3.24	Input	Local	
	ASDFD	HB01	HB Joinery Manufacturers	1.84	Input	Local	
	J0041	AB06	Absurdly Priced Windows	656.67	Input	Local	
	GRID-CUT	MB01	MBS Window Systems	3279.50	Production	Local	
	30039	IM01	Imperial Windows	4721.78	Input	South	
	J0038	GR01	Grosvenor Conservatories Windows &	33532.39	Input	North	
	COLORDB	CM01	Local Contractor	2091.48	Input	Local	
		1				1	1

Refer "How to create & schedule a Production batch for a single orders" topic in the help file for details.



Enhancement to Products

Windowmaker SQL

Saws

Maximum of 99 Saws can now be set-up in Windowmaker SQL.



Windowmaker 2012 R4.1

General Enhancements

Additional user rights

User Right	When logged in, the user who is granted this right will be able to
Sales Line BOM	View BOM details of a Sales Line if this right is granted
Override Survey Sizes Tolerance Limit	Enter survey sizes beyond the specified tolerance limit
Reactivate 'On Stop' Sales Orders	Reactivate Sales Orders flagged as 'On Stop'
Reactivate 'On Stop' Sales Quotes	Reactivate Sales Quotes flagged as 'On Stop'

Limit access to	When logged in, the user will only be able to
Selected Order Types	Access Sales Headers with specified Order Types

iscounts V V I ales Quotes V V I	Set Sup Cos Ted Glaz Proc
Costs, Margins V V Prices V V Discounts V V Customers V V V Sales Quotes U	Sup Cos Ted Glaz Proc
Prices V V . Discounts V V . Customers V V V V Sales Quotes U	Cos Ted Glaz Proc
Image: Constraint of the second sec	Ted Glaz Proc
Customers V V V V Sales Quotes U	Glaz
Sales Quotes	Proc
	_
Sales Orders/Return Orders 🔽 🖌 🗸	Cus
Sales Order Status	Oth
Return Order Status	Sch
Sales Lines	
Sales Line BOM	
Sarvey Schedule	
Purchases	
Installation Schedule	

D.		User 121: Jimmy
Cr	eate Database <u>U</u> ser	
He	ader Rights Limits	
	Allow access to Departments	<all></all>
	Sites	<all></all>
	Order Types	<all></all>
	Area Sales Headers View at	
	Restrict change from	OK Cancel

Document Headers and Footers

It is now possible to set-up up to 250 Document Headers and Footers each.



Sales Analysis

The Sales Analysis reports can now be generated for a specific Order Type, Area and/or Source i.e. these are now available as parameters.

	F	Report		×
Report	WM_Sales Analysis	_	<u>G</u> eneral Settings	<u>S</u> ettings
Printer: Cut	ePDF Writer		<u>(</u>	Change Printer
Invoice Date	02/03/2015 · 02/04/2015			
Order Type				
Area				
Source	<alb td="" 💌<=""><td></td><td></td><td></td></alb>			
<u>P</u> rint	Preview (PDF) Export	Export	E <u>m</u> ail	Cancel

Sales Header/Customer History

History description length has been extended to a maximum of 60 characters (instead of 50).

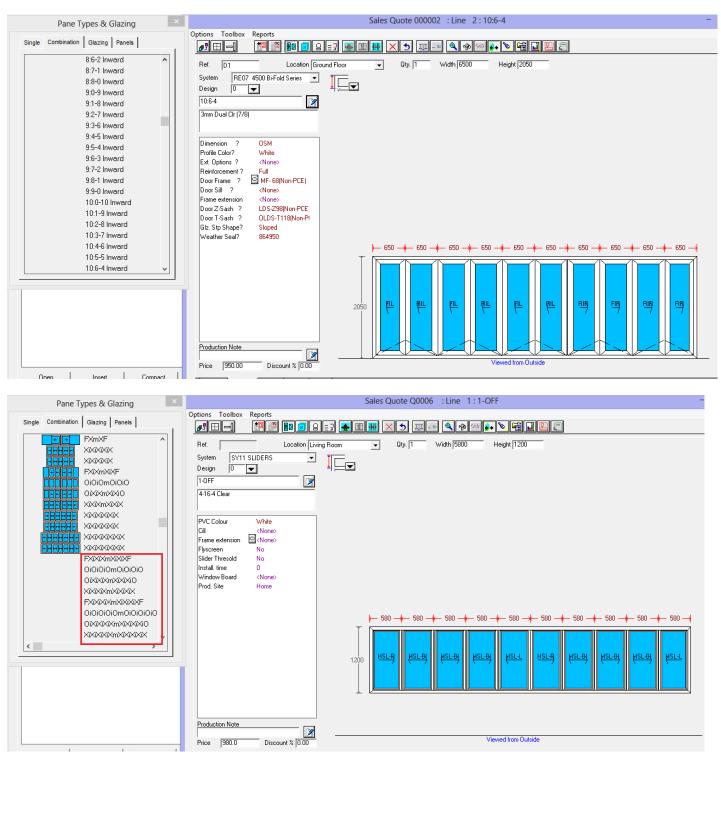
Hyperlinks to any web page or a shared folder on the network can be added to the History Memo field. As an example this is particularly useful to point to the relevant documents stored in a shared folder on the network or on Microsoft SharePoint, Lotus Notes, Google Docs or similar.

V	J/J0044	×
Activity	Information	
Description	Link to Repository	
Memo	\\im2\Shared\Proj\J0044 file://im2/Shared/ Builder Website Ctrl + Click to follow link	
<u>ок</u>	Cancel	
Created By: SUPER	RVISOR 06/04/2015 16:02:30	



Combination Pane Types

It is now possible to create folding doors and sliders with up to 16 panes using the new combination pane types.





Enhancements to Options

Advanced Data Management Tools

Move Records

Moving records now updates all associated data including Sales Quotes and Orders. Thus renumbering records will no longer require you to start with a fresh dataset.

Refer Move Records topic in help file for details.

Production/Delivery Scheduling

It is now possible to save layout of the 'Orders to be Scheduled' grid in the Production and Delivery Schedule boards.

Link to LogiKal

Windowmaker now links to Logikal 9.1, the latest release.



Windowmaker 2012 R4

General Enhancements

Windows Server 2012 R2 for Windowmaker

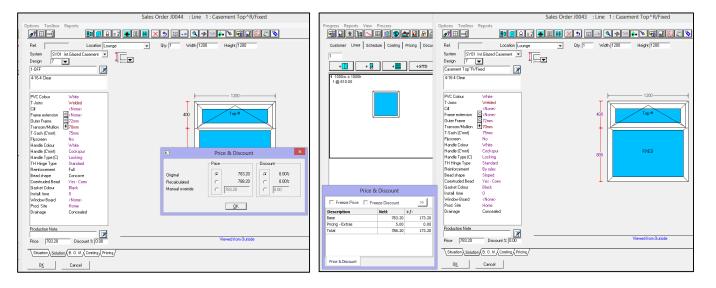
Windowmaker now supports running on Windows Server 2012 R2 operating system.

Better handling of Sales Line Price and Discount changes

An enhanced interface is now available for controlling the price and discount changes of a Sales Line during order entry.

- It is no longer necessary to press OK on Price and Discount Change dialog every time it appears, thus speeding up the order entry
- It is now possible to:
- Freeze (or unfreeze) the price and/or discounts for an individual Sales Line
- Automatically freeze the price and discounts when the Sales Order is progressed to 'Ordered' status
- At any time, before or after the 'Ordered' status, freeze or unfreeze price and/or discounts of an entire Sales Order or selected Sales Line(s) using Sales Header Recalculation or Global Changes

Refer How to freeze price and discounts for a Sales Line? in the help file for details.



Price	e & Discount				Price & Di	scount		
Freeze Price	Freeze Discount	>>	Freeze Price	Freeze	Discount			<<
Description	Nett	+/-	Description	Price	Disc. %	Disc(2). %	Nett	+/-
Base	649.04	-34.16	Base	683.20	0.00	5.00	649.04	-34.16
Installation	5.00	0.00	Installation	5.00	0.00	0.00	5.00	0.00
Supplements	40.00	0.00	Supplements	40.00	0.00	0.00	40.00	0.00
EX03	20.00	0.00	EX03	20.00	0.00	0.00	20.00	0.00
Total	714.04	-34.16	Total	748.20			714.04	-34.16
x 5	3570.20	-170.80	x 5	3741.00			3570.20	-170.80
Warnings Price 8	Discount		Warnings P	rice & Discou	nt			



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Glazing	<v< td=""><td>aries></td><td></td></v<>	aries>	
Options			
Π	ption	Answer	
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	Price Disc.		Price Disc.
Base Extras		List C 0.00 %	
Reference			
- Sales Header			
🗖 Discount			
🗖 Mark-up %			
	Cancel		

Module data migrated to database

The module data (Parts, Matrices, Systems& Rules) will now be stored in the database and not in the DAT files. The upgrade will automatically migrate them to the Database. This is part of the drive to abolish any flat file storage and take advantage of the relational database system.

New Subsystem types

It is now possible to create Subsystems that are private to the module in which they are set-up and are not accessible from other modules.

The existing subroutines can now be converted to Subsystems. Unlike subroutine a Subsystem can be:

- Called from other Subsystems
- Copied to a new one
- Imported/exported from one module to another or one dataset to another (e.g. from test dataset to live dataset)

A forthcoming Windowmaker release will allow more flexibility on naming the new Subsystems. It may be worth waiting for this version before doing the conversion of subroutines.

Note: Excel Subsystems are only available if you have 'Excel-based rules' Option in your Windowmaker licence.



		Migrate Data
Catalog System Description	System: SY07 Tilt and Slide	Import into Database Customer Special Terms Offcuts Saw Migrate From To
Туре	Tilt and Slide Subsystem Subsystem Private) Excel Subsystem Excel Subsystem (Private)	Convert Subroutines to Subsystems

Options

Migrated to database

Options are now stored in WMProduct table of Windowmaker database instead of WMPG.DAT and will be automatically migrated during the upgrade process. Apart from the benefits of storing in a database, option and answer descriptions can now be multi-lingual.

Options set-up User Interface

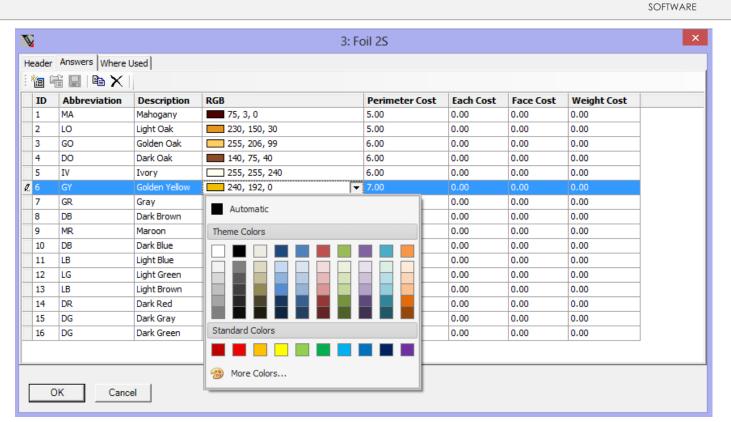
- Options are now set-up using a grid based set-up form
- Option input form is made simpler and tidier
- Answers can now be set-up from the Option input form

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	500101	Prod. Line 1	Prod. Line 1	Text Choice
	500110	Spacer thicknes	Spacer thicknes	Size
	500150	Door Material	Door Material	Finish Outside
	500151	Door size	Door size	Text Choice
	500152	Door Style	Door Style	Text Choice
	500153	Door Cutout	Door Cutout	Text Choice
	500155	Slite size	Slite size	Text Choice
	500156	Slite Style	Slite Style	Text Choice
	500157	Slite Cutout	Slite Cutout	Text Choice
	500158	Glass type	Glass type	Text Choice
	500159	Prod. Site	Prod. Site	Production Site
	500160	Wind Load	Wind Load	Wind Pressure
	FORMER	n ·		



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WINDOWMAKER

Refer Options topic in help file for details.

Part Filter Options NOTE:

Currently, Part Filter options are only available for the Entrance Doors module. In the future more of these options will be added.

New options of type 'Part Filter' are now available; the answers can be real parts. There is a change in the way the program determines the answers. For each Part Filter option 'filter criteria' are defined, which are in the form of other Options and <u>optionally</u> specifying their default answers. All parts matching these criteria, across eCatalogs, are considered as the answers of that option.

The benefits of having Part Filter options are:

- 1. Allows real parts to be answers to options. Previously answers were setup as non-real, then used in the rules to calculate the real parts. This will make data setup easier.
- 2. Allows answers to be across eCatalogs.
- 3. Allows merging datasets easily (e.g. PVC-U, Wood, Aluminium datasets).
- 4. Allows same answer to be shared across two or more different Options.
- 5. Eliminates the need of maintaining/modifying Option disallows. Depending on the matching criteria only the relevant answers will be available for selection.



V		384: Door Slab		×
Header Where U	sed			
ID	384			
Description	Door Slab			
	Door Slab			
Туре				
Prompt	Never			
Costhead	34 : Door Slab			
Answers		Filter Criteria		
C Optional		Option	Answer	
	u :	Tag	384	
Minimum	0 Maximum 0	Slab Width		
Not Mixable	–	Slab Height Slab Style		
1		Sidd Style		
Visible	_			
,				
0 <u>K</u>	Cancel			

New Option Answers UI for Sales Line

A new user interface to display and edit Option Answers on Solution page is now available and must be used for Part Filter options.

Upgrading to this version will automatically switch to using the new user interface. However, this can be changed to using one of the existing interfaces on the relevant Application Setting.

Note that configuring a Sales Line requiring Part Filter option(s) will automatically switch to using the new interface, even if existing interface is active as specified in the Application Setting.

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Col -Golder> Prane extension -Golder> Dutter Frame 72mm TranscompMullon - Tom TranscompMullon - Tom Prediction	T-Joins	Welded		
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V	Application Settings
Sales Aleader Sales Header Status Sales Line Link To CAD	Re-calculate for Equal Glass Tolerances for Sales Line Size Max. Round up 4 Max. Round down 6
Manufacturing Administration OK Cancel	Plan Dimensions Surveyed from Inside Outside Outside Width, Inside Projection Input Method Input Method Frame Depth 65

Defining Sales Header work flow

For a status it is now possible to specify previous and/or next statuses. A Sales Quote/Order at a particular status can only be progressed to one of the previous/next statuses specified on that status. This can help implement a workflow for a Sales Quote/Order and prevent users from skipping statuses.

Status 3: Quote sent to Cust.	
ID 3 Description Quote sent to Cust.] Allowed status(es) Previous Re-quote required Next Quote Expired, Quote signed by Cust, Quote On Stop	Progress Reports View Process 4: Quote Expired 1
O <u>K</u> Cancel	1 1000w x 1000h 1 @ 610.00

New User rights

New user rights are introduced to:

Allow access to selected	When logged in, the user will only be able to access
Department(s)	Selected department(s) and functionalities therein.
Site(s)	Site specific data e.g.:
	Purchases
	Production Batches
	Deliveries
	Production work stations (Saw/Cutting Centres, Welders, Glass
	Optimisers)
	Stock records and transactions
Sales Header – View at Statuses	Sales Headers at the specified status(es)



V	User 17: Bob
Delete Database <u>U</u> ser	
Header Rights Limits	
Allow access to	
Departments	Sales, Purchasing, Delivery, Stock, Products
Sites	Home, Pineville, Wilowdale 🔻
Area	5: East
Sales Headers	
View at	Re-quote required, Quote sent to Cust., Quote Ex 🔻
Restrict change from	Re-quote required
View only own	Quote sent to Cust.
	Quote signed by Cust
	Quote on hold
Maximum Undercharge Perc	
	Glass rec.
	OK Cancel
L	

Production Batches

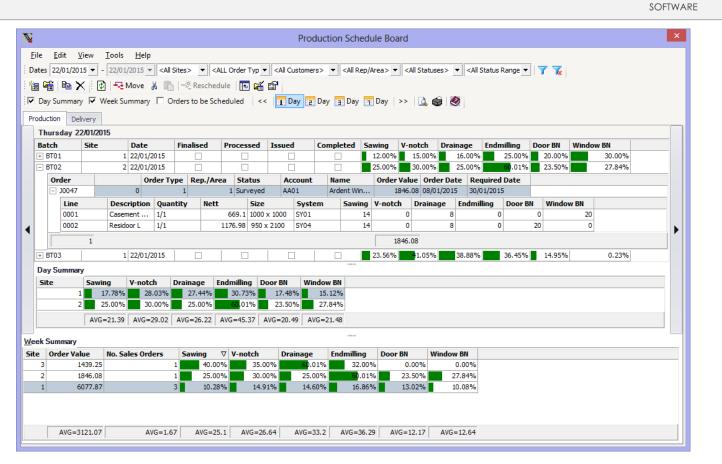
The Production Batch No. can now be up to 8 characters, instead of 6.

Enhancements to Options

Production Scheduling

This is now enhanced to display:

- ▲ Consumption of bottlenecks per Production Batch.
- ▲ Day summary of consumption of bottlenecks per Site, instead of per Production Batch.



WINDOWMAKER

Bar Optimisation

Bar optimisation is enhanced to allow re-sequencing of pieces to be cut from a bar to ensure that the first piece does not require any operation (positioned using Windowmaker system rules) within a specified length from start of the bar specified on the saw. This could be useful when:

- Tool dragging along profile to create slot causes vibrations on the bar as it can only be clamped in one place.
- Profile is very narrow and moves as it is machined.

	Saws/Cutting Centres : 8:					
Header Size Limits Cutti	ng Optimisation	Output Offcu	ts			
Optimisation • Windowmaker	Second	Quick	_			
 Windowmaker O At Saw 	Speed	Jaulok				
O At Saw						
Bar Sequence						
Prioritise butt-welded F	fieces & Lowest Slo	t Nos				
C Longest to Shortest						
C Longest to Shortest us	ed Length					
Piece Sequence						
 Shortest to Longest 						
C Longest to Shortest	C Longest to Shortest					
C Alternately						
Operation-free Length from Bar Start 150						
Cash						



Link to Welder

The link to 'Sturtz 4' welder is enhanced to include frame/sash having mixed profiles.

New Options

Entrance Doors

This new option allows Entrance Doors to be easily & quickly configured.

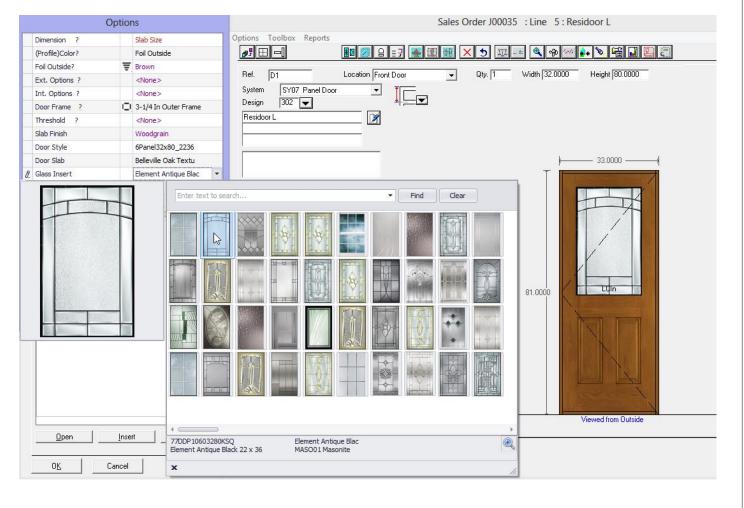
Create professional looking quotes and make it easier to showcase your slab and glass insert offering to your customers and prospects with a simple click of a button. Your sales reps no longer need to carry around bulky price lists and a paper brochure.

As a manufacturer you are able to simply:

- Select which suppliers' slab and glass insert ecatalog(s) to use
- Subscribe to using these
- Plug these in the data easily and quickly
- Switch to using ecatalog(s) from different supplier(s)

The option allows a user to:

- Input and price quotes quickly and easily
- Use door slabs and glass inserts from multiple suppliers
- Impress customers with graphics on Quotations and Photo Fronts
- Send Purchase Orders to your door slab and glass insert supplier(s)





Door Slab and Glass Insert eCatalogs

With Door Slabs and Glass Inserts Windowmaker introduces true eCatalogs. Unlike Modules the eCatalogs will be read-only for users, except updating costs. This will ensure that an identical copy of eCatalog is being used by all users. This will make future updates easier.

Products	
Products	
► A Modules	
👻 👬 eCatalogs	
AMASO01-MSFG14-1	
📩 NOVA02-NVFG15-1	
A MENN01-MEFS11-1	
📩 MASO01-MSGI14-1	
📩 ODL01-ODGI14-1	
📩 TRIM01-TLGI13-1	
📩 NOVA02-NVGI15-1	
Standard Products	
🕨 🙀 Glass	

Door Styles

Door Style represents how a door will look with the cut-outs, but without the glass insert. It can be considered as a wire-frame of the door pane(s), and is quite similar to Designs in this context.

Selecting a Door Style allows the listing and selecting of compatible slabs and inserts.



Windowmaker will publish and supply a Door Style eCatalog i.e. users cannot add, edit or delete Door Styles.

New Pane Type Class for Entrance Doors

It is now possible to create Pane Types suitable to door slabs and sidelights using the following new Pane Type Classes:

- Slab Door (Inward)
- Slab Door (Outward)
- ▲ Slab Door Slave (Inward)
- Slab Door Slave (Outward)
- Sidelight

This makes the data set-up and use of door slabs easier and more realistic.



	Pane Type: 96:		×	Pane Types & Glazing
Pane Type Class Handing C Left Opens C Inward C Outward	61: Sidelight		•	Single Combination Glazing Panels □ Door ① Inward ① Outward □ Fixed □ FixED
I Fixed Text Name Sizes	SDLT Windowmaker 3 Gr	aphic Code	0	+ Panel Wall SDLT

Single costhead each for door slabs and glass inserts

If using eCatalogs from multiple suppliers it is not essential to create a different costhead for each Supplier. The purchase order for the door slabs and glass inserts will be automatically generated for the correct supplier. The program will determine the supplier for a particular door slab or glass insert from the eCatalog.



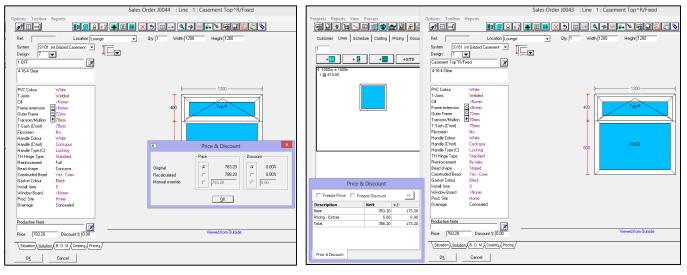
Windowmaker 2012 R3.8

General Enhancements

Better handling of Sales Line Price and Discount changes

An enhanced interface is now available for controlling the price and discount changes of a Sales Line during order entry.

- It is no longer necessary to press OK on Price and Discount Change dialog every time it appears, thus speeding up the order entry
- It is now possible to:
 - ▲ Freeze (or unfreeze) the price and/or discounts for an individual Sales Line.
 - Automatically freeze the price and discounts when the Sales Order is progressed to 'Ordered' status.
 - At any time, before or after the 'Ordered' status, freeze or unfreeze price and/or discounts of an entire Sales Order or selected Sales Line(s) using Sales Header Recalculation or Global Changes.



Price & Discount					
🗌 Freeze Price 🔲 F	reeze Discount	>>			
Description	Nett	+/-			
Base	649.04	-34.16			
Installation	5.00	0.00			
Supplements	40.00	0.00			
EX03	20.00	0.00			
Total	714.04	-34.16			
x 5	3570.20	-170.80			
Warnings Price & D	Discount				

	Price & Discount					
Freeze Price	Freeze Price Freeze Discount <					
Description	Price	Disc. %	Disc(2). %	Nett	+/-	
Base	683.20	0.00	5.00	649.04	-34.16	
Installation	5.00	0.00	0.00	5.00	0.00	
Supplements	40.00	0.00	0.00	40.00	0.00	
EX03	20.00	0.00	0.00	20.00	0.00	
Total	748.20			714.04	-34.16	
x 5	3741.00			3570.20	-170.80	
Warnings Pr	rice & Discour	nt				



	Global Changes ×				
System	<varies></varies>		•		
Glazing		<varies></varies>			
Options					
0	ption		Answer		
Sales Line		idate		Free	378
	Price Disc.			Price	Disc.
Base Extras		🖸 List	C 0.00 %		
Reference					
Sales Header-					
🗖 Discount	Discount				
Mark-up %					
<u>0</u> K	<u> </u>				

New User rights

New user rights are introduced to:

Allow access to selected	When logged in, the user will only be able to access
Department(s)	Selected department(s) and functionalities therein.
Site(s)	Site specific data e.g.:
	Purchases
	Production Batches
	Deliveries
	• Production work stations (Saw/Cutting Centres, Welders,
	Glass Optimisers)
	Stock records and transactions

N	User 11: Chris
Delete Database <u>U</u> ser	
Header Rights Umits	
Allow access to	
Departments	Sales, Purchasing, Manufacturing, Delivery, Stock 🔻
Sites	Home, Oakville , Pineville, Wilowdale 🔹
Area	0: <all></all>
Sales Headers	
View at	·
Restrict change from	1: Input
View only own	
Maximum Undercharge Per	Not Applicable ×



Windowmaker 2012 R3.7

Crystal Reports - New User Right - 'Export report'

It is now possible to allow/restrict user to export any crystal report, this helps prevent users from manipulating reports after exporting, e.g. XLS or RTF formats.

Crystal Reports – Automatic generation

It is now possible to automatically generate Sales Quote/Order crystal reports when its status is changed. Refer '<u>How to automatically generate Crystal reports on Status Change</u>' in the help file for details.

Conditional formatting on grid based set-up forms

The content of the grid based set-up forms can now be formatted depending on the conditions and expressions defined on the displayed data. You can define simple or expression based conditions. This is illustrated for the Sales Orders Live view using the conditions as seen below:

Eile Edit		rogress <u>R</u> eports Pro <u>c</u> esses <u>Tr</u> X 🕼 <u>1</u> Sales Orders (Live) 🔹 '	ools <u>H</u> elp	3 : Order OK	• 😭 🤌
Docu	-	Customer Documents (WRP) -			
Order ⊽	Account	Name	Order Value	Status	Delivery Date
7					
30054	ME01	Merlin Windows	66110.00	Hold	18/10/2014
J0053	AA01	Ardent Windows	8460.00	In Production	26/10/2014
30052	FA01	Fairdeal Home Improvements Ltd	7816.93	Input	28/10/2014
J0051	FE01	Feature Windows Ltd	5000.00	Despatched	
30050	DO02	Dolphin Windows	11760.98	Input	13/10/2014
30049	BC01	High-Tech Window Fitters	7490.61	Input	26/10/2014
30048	CO01	Commercial Customer Ltd.	10860.93	In Production	
30047	AB09	A&B Windows	9638.00	Despatched	
30046	AAA002	Famous Glass - Branch 2	3650.00	Input	16/10/2014
30045	AAA000	Famous Glass	25013.00	Despatched	
30044	AA02	AA Insulations Ltd	7850.00	Input	15/10/2014
30043	AA01	Ardent Windows	10005.00	Despatched	



Style Conditions	Simple Condition Editor
Image: Status] Less 20 [Status] GreaterOrEqual 82 [Order Value] Greater 10000 [DeliveryDate] Between (Today(),AddDays(Today(), 7))	Columns Status Condition Less Value1 20
Condition expression edito [Delivery Date] Between (Today(), AddDays(Today(), 7))	Appearance
$\begin{array}{c c c c c c c c c c c c c c c c c c c $	ForeColor Red GradientMode Horizontal Image (none) ▷ Options UseForeColor = True ▷ TextOptions ▼
OK Cancel	

Refer "How to apply conditional formatting on grid based set-up forms" topic in the help file for details.

Copying Sales Quotes/Orders

- ▲ It is now possible to create a Sales Quote by copying a Sales Order. This is particularly useful in cases where after survey the changes are such that the customer must be re-quoted. This also ensures that the survey details are retained in the new Sales Quote and hence need not be re-entered.
- When creating a new Sales Quote/Order by copying from an existing one it is now possible to Recalculate the new Sales Quote/Order, for latest prices.

		Sales Orders (Live	:)	
ile <u>E</u> dit	<u>V</u> iew <u>I</u>	<u>Progress R</u> eports Pro <u>c</u> esses <u>T</u> o	ools <u>H</u> elp	
ia 🞑 🚍) 🖷 🖬 C	opy to 🔩 🖈 🙆 📑 Sales Orders (L	ive) • ⊕ 🚆 📟	•
📄 Docum	ents 🗋	Sales Order Alt+S ents (WRP) - Recalculate	e Global Char
ag a columr	bead 🔒	Sales Quote Alt+Q		
order ⊽		Phased Order	Order Value	Rep./Area
order v	7 Acc 📃	Phased Quote	Under value	кер./Агеа
J0041	AA01	Ardent Windows	656.67	Local
30039	IM01	Imperial Windows	4721.78	South
30038	GR01	Grosvenor Conservatories Windows &	33532.39	North
COLORDB	CM01	Local Contractor	2091.48	Local
30024	EA01	Easiglaze Ltd	1155.20	South
30023	AI01	Airlock Double Glazing	23605.15	Local
J0022	DO01	Door & Windows Systems Ltd	926.90	South
J0021	HB01	HB Joinery Manufacturers	4275.00	Local
30020	AB06	Absurdly Priced Windows	2257.00	Local
J0019	MB01	MBS Window Systems	3303.18	Local
		1	3078450.46	1



Copy: Sales	der J0041 : Ardent Windows	×
Next No. Automatic C Manual		
Image: Recalculate Update Sales Line Sales Head Image: Price Image: Discount Image: Discount Image: Extras OK Cancel	Reason Sizes of 5th and 8th Sales Lines exceeds Tolerance Limits. This order needs to be requoted.	< >

Enhancements to Options

Multiple Locations

Selecting a Delivery Site for a Sales Quote

The route, and hence the starting delivery site, selected on the Sales Quote is now carried forward to the Sales Order it is converted to. This route and delivery site will be given priority when scheduling the Sales Order. For a Sales Quote this allows specifying the delivery site, and hence the default production site, to a different one than the default specified via the Customer <Main> route.

The Delivery Site is now available as a column on the Sales Quote/Order set-up forms.

Enhancement to Products

Windowmaker SQL

Controlling availability of fields

On an Order Type it is now possible to specify whether some fields of Sales Quotes/Orders, Sales Lines and Customers are:

Always mandatory	The user must enter a value when creating.
Mandatory from a particular status	The values of such fields must be filled before progressing Sales
	Quote/Order to the specified status.
Not applicable	These will be always disabled. Values for such fields need not be
	entered, to facilitate quicker entry.
Read-only from a particular status	The values of such fields cannot be changed when Sales
	Quote/Order progresses to/beyond the specified status.



2		Order Type 1: Dome	stic			
Header Fields						
1 X						
Туре	Field	Disable From	Mandatory From			
Sales Line	Reference	Surveyed	Under Survey			
Sales Line	Location	Order OK	Input			
Sales Order	Del. Street	Acknowl'd	Input			
Sales Order	Comment	<always></always>	<never></never>			
Customer	Name	<never></never>	<always></always>			
Customer	Street	<never></never>	<always></always>			
O <u>K</u> Car	ncel					

Refer <u>'How to make fields mandatory/read-only/not applicable at order entry?'</u> for details.



Windowmaker 2012 R3.6

General Enhancements

Specifying reason for a status change

When progressing the status of a Sales Quote/Order, it is now possible to specify a reason that caused the status progression. The reasons corresponding to each status can be set-up. Refer 'How to set-up Status Change Reasons' for details.

E.	2	Status Ch	ange Reasons				
F	ile <u>E</u>	dit <u>V</u> iew <u>T</u> ools	<u>H</u> elp				
i 🛅 🛕 🚔 🛍 🗙 🗗 🕶 📧 😭 🥔							
Drag a column header here to group by that column							
	ID	Status	Description				
뎧							
	1	Quote Lost	Lost to competitor				
	2	Quote Lost	Price negotiations failed				
	3	Quote Lost	Poor follow-up				
	8	Order Cancelled	Survey-exceeds tolerance limit				
	9	Order Cancelled	Payment not received				
	13	Hold	Technical errors				

More Address Lines

Windowmaker now supports an additional 'Street Address2' line for address, at all places in Windowmaker. This new address line is included on all the standard Windowmaker reports where the address is output. Each address line can now have up to 50 characters.

		Sales Order: J0057	: Windowmaker Software Ltd : Input		
Progress Reports View	Proc <u>e</u> ss				
Customer Lines Sch	edule Costing Pricing Documents Analysis				
Customer Name	WM01 : Windowmaker Software Ltd	" 6000 1000			
	Delivery Address 🔽 Same a	as Invoice Address			
	Meadway House	Meadway House			
Street Address 2	17 Brighton Road	17 Brighton Road			
Town/Lity	Surbiton	Surbiton			
County/State/Province	Surrey	Surrey			
Zip/Postal Code KT 6 5LR		KT 6 5LR			
Country	United Kingdom	United Kingdom			

Street Address 2 on Customer tab of a Sales Order



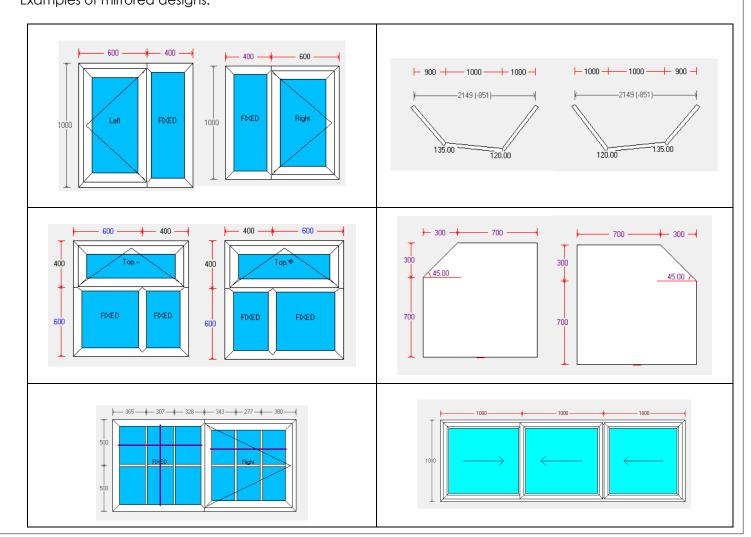
Delivery Address

For a Sales Quote/Order you can now specify whether the Delivery Address is the same as the Invoice address, to avoid retyping if that is the case.

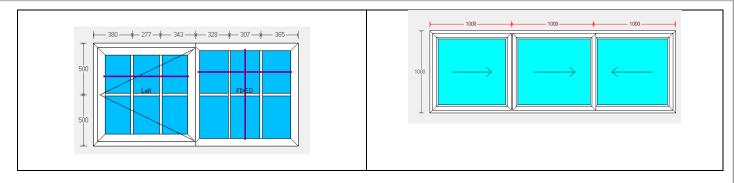
		Sales Order: J0051	: Windowmaker Software Ltd : Input
<u>P</u> rogress <u>R</u> eports <u>V</u> iew	Proc <u>e</u> ss		
🖼 🖬 🐚 🛌			
Customer Lines Sch	nedule Costing Pricing Documents Analysis		
Customer	WM01 : Windowmaker Software Ltd	Pakaka Doog	
Name	Windowmaker Software Ltd		
	Delivery Address 🔽 Same as Invoice Address	Invoice Address	
Street Address	Meadway House	Meadway House	
Street Address 2	17 Brighton Road	17 Brighton Road	
Town/City	Surbiton	Surbiton	
County/State/Province	Surrey	Surrey	
Zip/Postal Code	KT 6 5LR	KT 6 5LR	
Country	United Kingdom	United Kingdom	
Customer Bef		,	

Mirror Sales Lines

It is now possible to (horizontally) mirror Sales Lines in Windowmaker. This is useful to change to a design with opposite handing. Examples of mirrored designs:







For more details refer <u>'How to mirror Sales Lines'</u>in Windowmaker help.

Split Sales Lines

It is now possible to split a Sales Line into two in normal Sales Orders. Previously this was only possible for Sales Lines in a Phase (of the Phased Order).

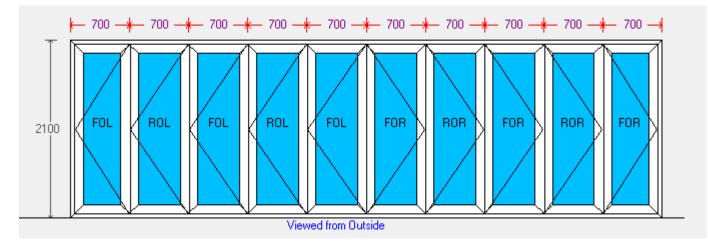
When splitting, the Sales Line can also be optionally mirrored.

V	Split Sales Lin	e ×
Quantity		1 /8
Change to	Mirrored Design	V
0 <u>K</u>	Cancel	

Note: Not available in Windowmaker Lite.

Number of panes per frame

Windowmaker now supports up to 16x6 panes per frame/facet, instead of the current 7x6 limit. E.g. Folding doors with 7+ panes can be created.



Note: Profile BOM can still not include lengths > bar length.

Processing large Production Batches

It is now possible to process a large production batch, containing sales lines resulting in a cumulative BOM line count of 65,000+. Earlier, this resulted in a 'Too many records' error.



Frame Production Settings

This is now enhanced to select Crystal Reports corresponding to the Frame Production. This enables selecting:

- a custom Crystal Report
- an appropriate standard or custom Crystal Report for labels
- an 'Other' Crystal Report

The selected Crystal Report will be used when Frame Production is run on a Production Batch to generate relevant reports. Earlier this used fixed standard Crystal Reports.

	Fra	ame Proc	luction		×
Process					
Cutting List	MY Cutting List	-	Settings	CutePDF Writer	
Profile Labels	WM_Profile Labels (Sheet)	-	Settings	CutePDF Writer	
Production Document	WM_Production Document	•	Settings	CutePDF Writer	
Other	WM_CE Labels	_	Settings	CutePDF Writer	
Frame Labels (WRP)			Settings	CutePDF Writer	
Sash Labels (WRP)			Settings	CutePDF Writer	
<u> </u>					

The colour coding shows that reports that will be generated when running Frame Production.

Profile & Reinforcement Cutting	-				0.00		
Costhead	Saw	Up 	timise —	Load List	Cutting List	Labels —	Control File
1 : Main profiles 💌	1: Standard	•					
3 : Ancillary profile	4: WorkLabel	•					M
4 : Beads 💌	5: Manual	-			$\overline{\mathbf{v}}$		Г
6 : Reinforcement	5: Manual	•	Γ		M	M	
Optimisation speed	Quick	•					
Welding				/Sash Assem	bly		
F	Welder		L E	rame Labels (WBP) 🔽	Production	Document
Frames	Generic Welder	•				_	
Sashes	Generic Welder	•	🗌 🗖 S	iash Labels (\	WRP) 🔽	Other	
Jpdate			1				
✓ Status to Production							
🔽 Stock	☑ Offcuts						
OK Cancel							



New Crystal Report - Part Labels

A new Crystal Report 'WM_Part Labels' is now available for running on a Production Batch. This can be used to generate labels for non-profile parts e.g. flyscreen mesh.

1/ PBFLY J0070/ 0001/ AA01 Ardent Windows FLYSCREEN Flyscreen Mesh 932w x 932h Kitchen	31-07-2014 1/1
1/ PBFLY J0070/ 0002/ AA01 Ardent Windows FLYSCREEN Flyscreen Mesh 1998w x 924h Kitchen	31-07-2014 1/1

Profile/Glass/Frame Labels

The standard Profile, Glass and Frame (Crystal Report) Labels are now simplified to support standard stationery. Refer Release Notes for details.

'GOTO Label' Rules

'GOTO Label' rules are now more visible and readable in the rules dialog:

3		Preview	<main></main>	-	1		Preview	<main></main>
No.		De	escription	^	No.		De	escription
9	Overall	Option/Part (Disallow)	159 Prod. Site		9	Overall	Option/Part (Disallow)	159 Prod. Site
10	Frame	Part	1901 1??? : Window Item		10	Frame	Part	1901 1??? : Window Item
11	Frame	GOSUB	Labour\SY08: Window Labour		11	Frame	GOSUB	Labour\SY08: Window Labour
12	Overall	GOSUB	Profile System Data\SY12: Overall Level Subs		12	Overall	GOSUB	Profile System Data\SY12: Overall Level Subs
13	Overall	GOSUB	Labour\SY01: Overall Labour		13	Overall	GOSUB	Labour\SY01: Overall Labour
14	Frame	GOSUB	Profile System Data\SY11: Clearances - Frame		14	Frame	GOSUB	Profile System Data\SY11: Clearances - Frame
15	Frame	GOTO	19 > Inline Patio Frame		15	Frame	GOTO	19 > Inline Patio Frame
16	Frame	GOTO	22 > VS Frame		16	Frame	GOTO	22 > VS Frame
17	Frame	GOTO	22 > VS Frame		1 17	Frame	GOTO	22 > VS Frame
18	Frame	GOTO	25 > Hinged Frame		18	Frame	GOTO	25 > Hinged Frame
19		Comment	> Inline Patio Frame		19	> Inline Pati	o Frame	
20	Frame	GOSUB	Profile System Data\SY07: Inline Patio Door		20	Frame	GOSUB	Profile System Data\SY07: Inline Patio Door
21	Frame	GOTO	29 > All Product Types		21	Frame	GOTO	29 > All Product Types
22		Comment	> VS Frame		22	> VS Frame		
23	Frame	GOSUB	Profile System Data\SYVS: Sliders		23	Frame	GOSUB	Profile System Data\SYVS: Sliders
24	Frame	GOTO	29 > All Product Types		24	Frame	GOTO	29 > All Product Types
25		Comment	> Hinged Frame		25	> Hinged Fr	ame	
26	Frame	GOSUB	Profile System Data\SY10: Option Calls - Frame		26	Frame	GOSUB	Profile System Data\SY10: Option Calls - Frame
27	Frame	GOSUB	Profile System Data\SY13: Frame Prof & Rein	~	27	Frame	GOSUB	Profile System Data\SY13: Frame Prof & Rein

Designs

It is now possible to set-up up to 2000 designs, instead of 999.

Testing 1-OFF designs in Rules

It is now possible to test for 1-OFF design in rules.



	Condition	×
Condition	Design	
	🗖 Not	
∟Detail		
Design	1-OFF 1 : Casement Fixed	
	2 Casement Fixed/Fixed 3 Casement TOP^L 4 Casement TOP^R 5 Casement Left 6 Casement Right 7 Casement Top^R/Fixed 8 Casement Fixed/Top^R 9 Casement Fixed/Left 10 Casement Fixed/Right	
O <u>K</u> Can	11 : Casement Top^R/Top^R 12 : Casement Top^R/Left 13 : Casement Top^L/Right 14 : Casement Top^R/Fixed/Fixed 15 : Casement Top^R/Fixed/Fixed 16 : Casement Fixed, Fixed 17 : Casement Fixed, Fixed 18 : Casement Fixed, Fixed, Fixed 19 : Casement Fixed, Fixed, Fixed 20 : Casement Top^R, Fixed 21 : Casement Fixed, Fixed, Fixed 21 : Casement Fixed, Fixed, Top^R 22 : Casement Left, Fixed	

New Combination Pane Types

New combination Pane Type 'XiOmOiX' is now available.

Pane Types & Glazing ×
Single Combination Glazing Panels
○ ○iOmOiO • • • • • • • • • • • • • • • • • • • • • •
← → FXmXF ← ← FXiXmXiXF OiOiOmOiOiO OiXiXmXiXiO ← ← OiXiXmXiXiO ← ← XiXixmXiXiX

Costing/Pricing Mark-up

All mark-up percentagesnow allow up to two decimal places. These are:

- 1. Order Type
- 2. System
- 3. Costhead \rightarrow Pricing Mark-up
- 4. Costhead \rightarrow Supplier Discount/Mark-up (+/- %)



New Options

Excel-based Rules

Windowmaker now supports MS Excel based Subsystems.

In this the rules for calculation are specified in a MS Excel file instead of Windowmaker. When called,

- o The required parameters are written to the Excel file
- The calculation is done using these
- \circ $\;$ The results are read from the Excel file

This can be efficiently used to calculate complex mathematical formulas and functions using various advanced features of Microsoft Excel that Windowmaker does not support.

Currently, the input parameters are limited to the user defined option answers and the results are also limited to option answers or an error/warning. In future this will be extended to provide more input parameters and calculate BOM as the result.

	System: SY08 Wind Pressure Calc – 🗖 🗙
Catalog System Description	Profile System Data SY08 Wind Pressure Calc
	System to calulcate Wind Pressure
Туре	Subsystem (Excel)
File	Wind Pressure.xlsx

Example:

Excel sub-system can be set-up to calculate value of Wind pressure based on various parameters like wind speed, pressure coefficient, risk factor etc.

	A	В	С	D	E	2		
1	Column	WM will	Description		-			
	Parameter Type:	Read	2: Option (Default), 3: Option (Auto)				<u>O</u> ptions <u>T</u> oolbox	<u>R</u> eports
	Parameter ID:	Read	Option No.				₽ 🖽 🖃	80 😥 🔒
4	Description (optional):	N/A	Parameter Description. You can opt	ionally enter this to imp	prove readability.			
		Read (for default					Ref.	Location
		values) Write (for user input						Location
5	Value:	values)	Specify default value, else leave bla	nk		=	System SY01	Int.Glazed Casement 🛛 💌
6			Description of the default value. You		is to improve readability.		Design 1	-
7				1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 -				<u>•</u>
8		Parameter ID	Description	Value	Answer Description		Casement Fixed	
9		3 50000		Varanasi				
10			Building Height		(in meters)			
1:			Design Life (in years) Terrain Category		50 years open terrain with scattered obstru-			
13			Slope of the ground near the Site		< 3 degrees		4-12-4 Clear	
14			cpe	1.25	t 5 degrees			
1) cpi	0.5				
10	i	3 50001	Order Type	1		-	PVC Colour	White
H		WM Input Params 🦯	WM Output Params 📈 Calculation Pa	arameter 🖉 Wind Speed	d 🖉 Risk Facto 🛛 4 💷 🔹 🕨 🚺		Window Height	20
E	lit 🛅			III 🗆 🛛	표 100% 🕞 🛶 🕂 🕂		Design Life	3
	e				'6' a al 1a Ala a Essa a l 6		Terrain Group	2
De	etault values t	or the wind	pressure paramete	ers are spec	ified in the Excel f	le.		2
							Ground Slope	1.050
							Сре	1.250
							Срі	0.500
							Wind Pressure	2656
							Cill	<none></none>
							Frame extension	None>
							Outer Frame	9 72mm
								_
L								



	A	В	С	D	E	F 🚍
	Column	WM will	Description			ĥ
	Parameter Type:	Read	1: Error/Warning 2: Option (De	fault), 3: Option (Auto)		
	Parameter ID:	Read	Option No. or Error/Warning P	art no.		
	Description (optional):		Parameter Description. You ca	an optionally enter this to	improve readability.	
	Value:	Read	The computed value should be	set here. Windowmaker	will read it.	
5	Answer Description (op	tional):	Description of the default value	. You can optionally enter	r this to improve readability.	
	To compute the outputs	use separate sheets	. Any number of sheets can be	used.		
)						_
)	Parameter Type	Parameter ID	Description	Value	Answer Description	_
1	3	11	Wind Pressure	2656		
2	1	526	Invalid City	0		
3	1	527	Invalid K1	0		
4	1	528	Invalid K2	0		
5	1	529	Invalid K3	0		
6	1	530	Invalid Cp	0		
7						
8						
0		_				-
9		i		ulation Darameter / Mind	d Speed / Risk Facto∏ ∢ 💷	▶ []
9	WM Mapping	WM Input Params	WM Output Params / Calc			

new Sales Line the pressure is ulated using the ult values.

Wind pressure is calculated in the Excel using the default values.

	A 1 Column	B WM will	C Description	D	E
Options Toolbox Reports	2 Parameter Type:	Read	2: Option (Default), 3: Option (Aut	to)	
	3 Parameter ID:	Read	Option No.		
	4 Description (optional):	N/A Read (for default	Parameter Description. You can o	optionally enter this to in	nprove readability.
Ref. Location		values) Write (for user inp	ut		
	5 Value:	values)	Specify default value, else leave b		
System SY01 Int.Glazed Casement 💌	6 Answer Description (op	tion N/A	Description of the default value. Y	ou can optionally enter	this to improve readability.
Design 1	8 Parameter Type	Parameter ID		Value	Answer Description
Casement Fixed	9	3 500	00 City 5 Building Height	Varanasi 4) (in meters)
	11	2	6 Design Life (in years)		3 50 years
	12	2	7 Terrain Category		2 open terrain with scattered obstru
	13 14	2	8 Slope of the ground near the Site 9 cpe	1.2	1 < 3 degrees
4-16-4 Clear	15	2	10 cpi	0.	5
	16		01 Order Type		•
	I I I I Ready I I	WM Input Params	WM Output Params / Calculation		ed _ Risk Facto [] 4
PVC Colour White		•• ••			
Window Height	Windowmaker		keyed in values o		
Design Life 3	A Column	B WM will	C Description	D	E F
Terrain Group 2	2 Parameter Type:	Read	1: Error/Warning 2: Option (Default),	3: Option (Auto)	
Ground Slope 1	3 Parameter ID:	Read	Option No. or Error/Warning Part no.		1.1.1.1
	4 Description (optional): 5 Value:	Read	Parameter Description. You can opti The computed value should be set he		
	6 Answer Description (op		Description of the default value. You		
Cpi 0.500	7 8 To compute the outputs	una constata chesta	. Any number of sheets can be used.		
	9	use separate sneets	. Any number of sneets can be used.		_
Update any parameter	10 Parameter Type 11 3	Parameter ID	Description Wind Pressure	Value 4 3041	Answer Description
affecting wind pressure	12 1		Invalid City	0	
•	13 1	527	Invalid K1	0	
calculation	14 1 15 1		Invalid K2 Invalid K3	0	
	16 1		Invalid Cp	0	
	17 18				
	19				v
	H ← ► ► WM Mapping <	WM Input Params	WM Output Params Calculation		
	Ready 🔚] 🛄 100% 🗩 🖓 🕂 🛄
	and calculat	es the wine	d pressure accord	ingly	
TVC Colour Av/Da	or returns an	error			
PVC Colour White					
Window Height 40					
Design Life 3					
Terrain Group 2					
Ground Slope 1					
Cpe 1.250					
Cpi 0.500					
Wind Pressure 3041					
Lill <none></none>					
Frame extension 🖾 <none></none>					
Outer Frame 172mm					
The calculated value is read					
by Windowmaker and can be					
-					
used to test in further					



(for default s) (for user input s) arameter ID 50000 5 6 7 8	Description 2: Option (Default), 3: O Option No. Parameter Description. Specify default value, el Description of the defau Description City Building Height Design Life (in years) Terrain Category	ption (Auto) You can optic se leave blank t value. You c	c. can optionally enter t Value test		
(for default s) (for user input s) arameter ID 50000 5 6 7 8	Option No. Parameter Description. Specify default value, el Description of the defau Description City Building Height Design Life (in years)	You can optic se leave blank t value. You o	c. can optionally enter t Value test	his to improve reada	
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s) (for user input s) arameter ID 50000 5 6 6 7 8	Description of the defau Description City Building Height Design Life (in years)	t value. You o	can optionally enter t Value	Answer De	
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arameter ID 50000 5 6 7 8	Description of the defau Description City Building Height Design Life (in years)	t value. You o	can optionally enter t Value	Answer De	
arameter ID 50000 5 6 7 8	Description City Building Height Design Life (in years)		Value	Answer De	
50000 5 6 7 8	City Building Height Design Life (in years)		test		scription
50000 5 6 7 8	City Building Height Design Life (in years)		test		scription
50000 5 6 7 8	City Building Height Design Life (in years)		test		scription
50000 5 6 7 8	City Building Height Design Life (in years)		test		
5 6 7 8	Building Height Design Life (in years)) (in meters)	
6 7 8	Design Life (in years)		20		
7				3 50 years	
8					cattered obstructions having heights
	Slope of the ground nea	the Site		<pre>2 open terrain with s 1 < 3 degrees</pre>	cattered obstructions naving neights
Q	cpe	the one	1.2		
	WM Input Params	WM Output			ind Speed Risk Factor 4
	WM Input Params	VVM Output		son Parameter 🔬 🗤	
1					🔟 🛄 100% 🖂 ─── 🗸 ──
ription (optional) e:	: Read	Parameter De The compute	escription. You can o d value should be se	optionally enter this et here. Windowmak	er will read it.
mpute the outp	uts use separate sheets	. Any number	r of sheets can be us	sed.	
ramotor Tupo	Paramotor ID	- Do	earintion	Value	Answer Description
nameter rype					Answer Description
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	A Column meter Type: meter ID: ription (optional) :: umpute the outpi rameter Type	A B Column WM will meter Type: Read meter ID: Read ription (optional): :: Read ter Description (optional): impute the outputs use separate sheets immeter Type Parameter ID 3 11 1 526 1 527 1 528 1 530 WM Mapping WM Input Params	A B Column WM will Demeter Type: neter Type: Read 1: Error/Warrenter D reter Type: Read Option No. or reter Description (optional): Parameter D representation (optional): Description or remeter Type Parameter ID Description or a 11 Wind Pressu 1 526 Invalid K1 1 528 Invalid K2 1 529 Invalid K3 1 530 Invalid K2 1 530 Invalid Cp	A B C Column WM will Description meter Type: Read 1: Error/Warning 2: Option (Defaumed the second the sec	A B C D Column WM will Description Description neter Type: Read 1: Error/Warning 2: Option (Defauit), 3: Option (Auto) ription (optional): Parameter Description. You can optionally enter this re Read The computed value should be set here. Windowmak re Description of the default value. You can optionally enter this remeter Type Parameter ID Description 3 11 Wind Pressure 3 11 Wind Pressure 1 526 Invalid K1 1 528 Invalid K2 1 529 Invalid K3 1 530 Invalid K3 1 530 Invalid Cp 1 530 Invalid Cp 1 530 Invalid Cp 1 530 Invalid Cp

Refer <u>'How to create an Excel Subsystem'</u> in the help file for details or write to <u>help@windowmaker.com</u> for more details on Excel System.

Click <u>here</u> to request a demo on Excel Subsystems.

Surveying

The new Windowmaker Surveying option enables several facilities to handle the survey stage of a Sales Order better and more efficiently.

Survey milestone status

It is now possible to designate status corresponding to 'Under Survey' and 'Survey Complete'.

Split Sales Lines per quantity

It is now possible to split a Sales Line with >1 quantity into multiple Sales Lines with 1 quantity each – so that there is one corresponding to each hole in the wall. All the Sales Lines of an Order can be automatically split

- When progressing the status of a Sales Order to 'Under Survey'
- At a click of a button from the Sales Order

At the same time as splitting it is possible to

- ▲ Modify Reference and Location for each to uniquely identify a hole in the wall
- Mirror the design

Sales Line No. System Reference 1 SY01 Window 1 2 SY01 Window 2 3 SY01 Window 3 4 SY01 Window 4 5 SY01 Window 5 6 SY01 Window 6 7 SY01 Window 7	Location Living Room Living Room Hall Hall Kitchen Bedroom1	Mirror	
3 SY01 Window 3 4 SY01 Window 4 5 SY01 Window 5 6 SY01 Window 6 7 SY01 Window 7	Living Room Hall Hall Kitchen		
4 SY01 Window 4 5 SY01 Window 5 6 SY01 Window 6 7 SY01 Window 7	Hall Kitchen		
5 SY01 Window 5 6 SY01 Window 6 7 SY01 Window 7	Kitchen		
6 SY01 Window 6 7 SY01 Window 7			
7 SY01 Window 7	Bedroom1		
		✓	
	Bedroom2		
8 SY01 Window 8	Bedroom3		
9 SY01 Window 9	Bedroom4		
10 SY01 Window 10	Hal		

SOFTWARE

Survey Sheet

Splitting Sales Lines so that there is one corresponding to each hole in the wall enables the Survey Sheet to:

- Include and record details for each hole in the wall
- List the Sales Lines in sequence in which these might actually be surveyed. For this the Sales Lines will be listed in ascending order of Location. This requires that the Location for each hole in the wall is entered sensibly.

Record Survey Sizes

It is now easy and efficient to feed the survey details into Windowmaker. For each Sales Line, the new 'Record Survey Sizes' facility allows to:

- Enter the survey sizes.
- Round the survey sizes down by an adjustment (This allows multiple windows to be manufactured for the same size rather than individually with minor size differences. It also makes it easier to match windows with the correct hole during installation.)
- ▲ Update Reference/Location, if required.
- Mirror the design.
- ▲ Update Installation Note.

Once the survey details are recorded it allows the BOM to be recalculated for the amended sizes and the changes to be saved.



Line No. 3			Height	Width	Surveyed Height	Reference	Location	Mirror	Installation Note	Calculation Results	Survey	
5000 31	Y01	1000	1000	1000		Window 6	Bedroom 1				~	
0007 S1	Y01	1000	1000	1000	1000	Window 7	Bedroom2	~				
0008 S1	Y01	1000	1000	1000	1000	Window 8	Bedroom3				¥	
0009 S1	Y01	1000	1000	1000	1000	Window 9	Bedroom4	~				
0003 S1	Y01	1000	1000	1000	1000	Window 3	Hall				¥	
0004 S1	Y01	1000	1000	1000	1000	Window 4	Hall	~				
0010 S1	Y01	1000	1000	1000	1000	Window 10	Hall				✓	
0005 S1	Y01	1000	1000	1000	1000	Window 5	Kitchen				✓	
0001 SY	Y01	1000	1000	1000	1000	Window 1	Living Room				~	
0002 SY	Y01	1000	1000	1000	1000	Window 2	Living Room				v	

Size Tolerance Limits

It is now possible to specify the size tolerance limits for survey on an Order Type. If the surveyed sizes are beyond the specified tolerance limits then the program will not allow saving these. Usually in such circumstances the customer will be re-quoted.

N Ord	ler Type 3: Commercial
ID 3 Description Commercial	Progress Separately
Pricing Costhead Terms © A (Cost + Mark-up) © B (Price List 1) © C (Price List 2) Split Ratio Normal EX01 % EX02 % EX03 %	Mark-up 45.00 Mark-up % 45.00 Iv Apply Mark-up on Pricing Extras Separately EX01 30.00 EX02 45.00 EX03 50.00 Image: Apply to manual B.O.M. lines only Image: Use Price Matrix Image: Allow Price per Sales Order
─Stages Required Survey Delivery	✓ Production ✓ Installation
50 - IIII	Validity Period Sales Quote 60 ↓ days Sales Order 180 ↓ days
Fields Required Situation IV Reference IV Height above floor Solution	Location Installation Note
Design Desc. 3 Multiline Text OK Cancel	Design Desc. 2 Froduction Note

Note: These features are only available if module data is migrated to database. See 'How to know whether module data is migrated to database or not' topic in the Help file.



Generic Glass Optimiser

It is now possible to set-up Glass Optimiser Stations for a generic glass optimiser.

When 'Link to other Glass Optimisers' process is run on it a WMStationTransaction record with generic data is generated. This can be post-processed to generate a link file specific to a particular optimiser. This requires a .NET post-processor assembly to be developed and associated with the Glass Optimiser. The post-processor can be developed by you or a 3rd party developer or Windowmaker.

Glass	Optimisers 901: Optimax ×	P.	Glass Opt	imisers	×
Station No. Site Description	901 1: Home	1	Edit View Iool		.
Machine Type	Generic Optimiser	No. ▶ 901	Description Optimax	Site Home	Δ
Shape Authority	Windowmaker 💌	902	Perfect Cut	Oakville	
		903	Optiway	Pineville	
<u> </u>	Cancel	904	Trimloss	Wilowdale	



Enhancement to Options

Pricing Extras

Exempting from Taxation

It is now possible to exempt Pricing Extras (e.g. transport, lead and lift charges) from taxation. This can be specified in:

- Application Settings \rightarrow Sales \rightarrow Sales Header
- Part Systems (if Tax from System)

Apply Ta	ax on Pricing E	extras Separately
EX01	4: Service Ta	ax 🔻
EX02	<none></none>	▼
EX03	<none></none>	▼
	ax (B)	

	System: SYPT Extra Charge	S
Catalog	<main></main>	
System	SYPT	
	,	
Description	Extra Charges	
	Extra Charges	
Туре	Parts 💌	Display Sequence 23
Limit Selection to-	-	
Module	Trade Pricing 💌	🔽 Allow Manual Items
Costhead	20 : Pricing - Extras	
- Tax		
Tax from Custo	mer	
Tax (A)	4 : Service Tax 💌	🗖 Apply Tax (B)
	<pre>None></pre>	
Mark-up %	1 : VAI 2 : Standard	

Applying different mark-ups

On an Order Type, it is now possible to specify different mark-up, than the normal, for each pricing extras category.



ID 1 Description Domestic Duplicate Sales Line entry required Progress Separately Pricing Costhead Terms C A (Cost + Mark-up) Mark-up % Image: B (Price List 1) Image: Costhead Terms C C (Price List 2) EX01 Split Ratio % Normal % EX01 % Image: Price Cost = 0.000 Image: Price Cost = 0.0000 Image: Price Cost = 0.0000<	×
Pricing Mark-up C A (Cost + Mark-up) Mark-up % 10.00 © B (Price List 1) Apply Mark-up on Pricing Extras Separately C C (Price List 2) EX01 Split Ratio % Normal %	
Costhead Terms Mark-up C A (Cost + Mark-up) Mark-up % 10.00 I Price List 1) I Apply Mark-up on Pricing Extras Separately C C (Price List 2) EX01 Split Ratio 10.00 Normal %	
I* B (Price List 1) EX01 5.00 C C (Price List 2) EX02 8.00 Split Ratio X03 10.00 Normal % Image: Apply to manual B.O.M. lines only	
Split Ratio % Vormal %	
Split Ratio Normal % ✓ Apply to manual B.O.M. lines only	
I P Apply to manual B.O.M. titles only	-4
EX02 % Use Price Matrix	
EX03 % Allow Price per Sales Order	

				Summary	•
Description	Nett	Mark-up	Curr. List	List	Actual
Price List 1	610.00	122.00	732.00		
Subtotal	610.00	122.00	732.00	732.00	732.00
Discount %			0.00	0.00	0.00
Total			732.00	732.00	732.00
Pricing - Extras	100.00	5.00	105.00		
Subtotal	100.00	5.00	105.00	105.00	105.00
Discount %			0.00	0.00	0.00
Total			105.00	105.00	105.00
Pricing Extras 2	100.00	8.00	108.00		
Subtotal	100.00	8.00	108.00	108.00	108.00
Discount %			0.00	0.00	0.00
Total			108.00	108.00	108.00
Pricing Extras 3	100.00	10.00	110.00		
Subtotal	100.00	10.00	110.00	110.00	110.00
Discount %			0.00	0.00	0.00
Total			110.00	110.00	110.00
Total			1055.00		

Sales Header Pricing Page - Calculating 'Pricing – Extras' with Mark-ups Specified on the Order Type.

Note: Not available in Windowseller.

Split Pricing

On an Order Type, it is now possible to specify the 'split ratio' between 'Normal' and 'Pricing Extras' costheads. The calculated nett Sales Line price is pro-rata according to the specified ratio. This is particularly useful in case of commercial projects e.g. to split the price between material and installation in the specified proportion.



V		Order Ty
ID Description	3 Commercial	-
Pricing	s Line entry required	F F
Costhead Terms		Mark Mark-
C B (Price List	1)	EX01
C C (Price List)	2)	EX02
Pro-rata Price	▼ 80	% □ A
EX01 J	☑ 20	% % □ ∪
EX03 [% ⊠ A
 Stages Required		

Refer 'How to split Sales Line Prices?' in the help file for details.

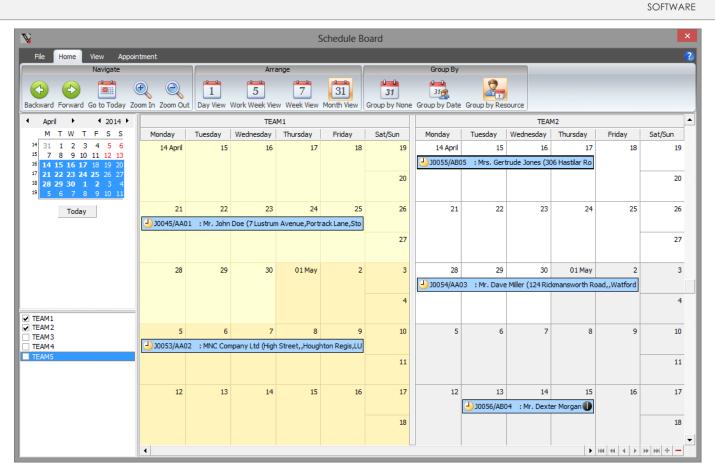
Installation Scheduling

Installation Schedule Board

An installation 'Schedule Board' is introduced. The Schedule Board is a real time 'snapshot' of the Installation Schedule.

Use the Schedule Board to:

- ▲ View one or more team calendars
- A Print the team calendar
- ▲ Edit or split appointments
- ▲ Reschedule an installation from one team to another using drag and drop



WINDOWMAKER

Link to Saw

▲ Windowmaker can now link to Wegoma SD500 Saw.

Link to Working Centre

Windowmaker can now link to Murat NR210Working Centre.

Tracking

Windowmaker Tracking is now enhanced to control USB based stack lights at a tracking station. The lights will glow depending on the situation at the tracking station:

- Amber Work not in progress e.g. if logged in to tracking station, but no barcode scanned
- Green Work in progress e.g. barcode scanned but not yet progressed to next station
- Red Problem e.g. barcode scanning problem, fault identified etc.

This helps take better control of the production floor.





Link to Glass Optimisers

Windowmaker can now link to the following glass optimisers:

- Aculite
- ▲ WinlG

Glass Purchase

Windowmaker has been enhanced to map Windowmaker Glass Shape codes and parameters to WinlGones.

orts	
Header Inventory Details	Transactions
Supplier No.	GSUP1 Name Double Glazing Suppliers
Address	35 Bonnyside Road Street Address Bonnybridge Street Address2 Stirlingshire Town/City FK4 2AD County/State/Province Zip/Postal Code Country
Reference	
Tel.	349210
Fax	321308
Email	Glasspot@jobway.co.uk
Currency	1:
Type Purchase Order	Glazing Supplier
Format	XML(XSD) Shape Authority WinIG
Output Method	Disk File Sizes Windowmaker A+W PMC Lisec
0 <u>K</u> Can	

Optimised Costing/Pricing

The optimised costing/pricing process is now also available for running

- On computers running 64 bit operating system
- With 32-bit bar optimization
- Even if module data stored in database

It is now enhanced to:

- Allow changing the price of the Sales Quote/Order to the optimised price.
- Pro-rata the actual wastage calculated for each profile across the BOM lines for that profile and store in the WMBom.ActualWastageVolume field, if using Stored BOM. The Costing/Pricing reports will always show the actual wastage in this case. This can help analyse the statistics/trends of actual



wastage for each profile and revise the standard wastage% on the profile parts accordingly to get more accurate costing.

Refer help topic 'How to use optimised costing/pricing' for more details.

User Data

If user defined data fields with same names and data types are defined for Sales Headers and Customers then while creating a new Sales Header values of those user defined fields will be automatically copied from the corresponding Customer.

Advanced Data Setup Tools

It is now possible to renumber Design records using the 'Move Records' facility.

V		Move Records	×
Туре	Designs	•	
Range			
575 : SL-LD	out	▼ - 586 : RDin	-
То	1000	1011	
C File			
🗌 Keep sou	rce records	Compact destination records	
<u>M</u> ove	Don <u>e</u>		



Enhancement to Products

Windowmaker SQL

Sales Header On Stop

A Sales Quote/Order can now be put 'On Stop'. An 'On Stop' Sales Quote/Order cannot be modified. No reports can be run on it. All such Sales Quotes/Orders are listed in the respective 'On Stop' views. The 'On Stop' state can be reset.

Sales	
🕨 🦥 Customers	*
👻 📙 Sales Quotes	0
🕨 🛃 Import from	
T Live	
🍸 On Stop	
🍸 Complete	
🛛 🏹 All	
👻 📑 Sales Orders	
🕨 🌄 Import from	
T live	
🍸 On Stop	
🍸 Complete	
🛛 🏹 All	
👻 📄 Return Orders	
T live	1 11
🍸 On Stop	
T Complete	_
TAN T	0
Reports	· ·

Refer 'How to put a Sales Header on Stop' in the help file for details.

Sales Header Validity

It is now possible to define validity period for a Sales Quote/Order. The expiry date of the Sales Header will be calculated as Creation Date + Validity Period defined on the corresponding Order Type.

A Sales Quote/Order can be automatically flagged as expired at the end of the validity period. An expired Sales Quote/Order is treated as 'On Stop'.

An expired Sales Quote/Order can be recalculated (for latest prices) and reactivated.



N	Order Type 1: Domestic
ID 1 Description Domestic Duplicate Sales Line entry required Pricing	Progress Separately
Costhead Terms © A (Cost + Mark-up) © B (Price List 1) © C (Price List 2) Split Ratio Normal % EX01 % EX02 % EX03 %	Mark-up Mark-up % IO.00 Apply Mark-up on Pricing Extras Separately EX01 EX02 EX03 Apply to manual B.O.M. lines only Use Price Matrix ✓ Allow Price per Sales Order
Stages Required Survey Delivery	 ✓ Production ✓ Installation
Survey Size Tolerance Limit 0 Round down to 0 mm	Validity Period Sales Quote 15 + days Sales Order 30 + days
Fields Required	

		Sales Quote Q0006 : Ar
<u>P</u> rogress <u>R</u> eports <u>V</u> iev	v Proc <u>e</u> ss	
🖆 🖬 🏩 📉	. 💷 🗐 🌑 🕋 🚺 🛃 🎆	
Customer Lines Sc	chedule Costing Pricing Documents Analysis	
Customer	AA01 : Ardent Windows	
Name	Ardent Windows	
	Delivery Address 🔽 Sam	e as Invoice Address
Street Address	7 Lustrum Avenue	7 Lustrum Avenue
Street Address 2	North Tees Estate	North Tees Estate
Town/City	Portrack Lane	Portrack Lane
County/State/Province	Stockton On Tees	Stockton On Tees
Zip/Postal Code	TS18 2RB	TS18 2RB
Country	Cleveland	Cleveland
Customer Ref.	CUS1	
Quote Date	30/06/2014 Expiry Date	30/07/2014
T 1		



Windowmaker 2012 R3.4

New Product

Windowmaker Alu-Lite

Windowmaker Alu-Lite is a solution especially created for Aluminium fabricators. The solution comprises of the Windowmaker program and data template along with Do-it-Yourself documentation. This enables you to quickly create new systems yourself to cater to the dynamic nature of aluminium fabrication.

Visit <u>Windowmaker Alu-Lite</u>webpage for more details. Click <u>here</u> to request a demo on Windowmaker Alu-Lite.



About Windowmaker 2012

Version

6.3.4

User Licence No. WSLDEMA /0

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Products

Windowmaker Lite

Export / Import Catalog(.XML) facility is now available. This will enable easy transfer of catalog updates, without overriding costs and/or fabricator specific data.

General Enhancements

Data Transfer

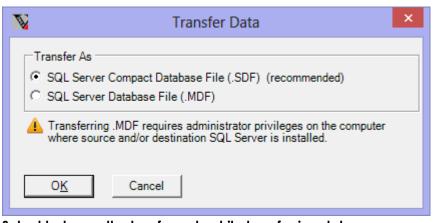
You can now use the following Windowmaker functionalities without needing to give Administrative Rights/Privileges to the users:

- a. Transfer Data
- b. Create Windowseller Data
- c. Create Sales Data
- d. Create Fabricator Data
- e. Import Database

This is particularly a problem when the SQL Server is not installed on a server computer located locally i.e. hosted somewhere else.

This is achieved by transferring the data in <u>SQL Server Compact (.SDF)</u> format. You can select whether the database should be transferred as either a SQL Server Compact Database file (.SDF) or a SQL Server Database file (.MDF).





Select between the two formats while transferring data

Refer <u>'How to transfer data'</u> help topic for more details.

Survey Sheet

Г

The report now includes the Email address, Telephone No. and Fax No.

	Survey Sheet
Windowmaker Meadway House, 17, Brighton road, Surbiton Surrey, KT6 5LR UK Tel. ++44 0208 390 4931 Fax ++44 0208 390 6147	
Email info@windowmaker.com	Deliver to
Ardent Windows 7 Lustrum Avenue Portrack Lane Stockton On Tees TS18 2RB Cleveland Tel. +44 (0) 20 8390 4931 Fax +44 (0) 20 8390 6147 Email info@abcwindow.com	7 Lustrum Avenue Portrack Lane Stockton On Tees TS18 2RB Cleveland

Windows 8.1 for Windowmaker

Windowmaker now supports running on Windows 8.1 operating system.

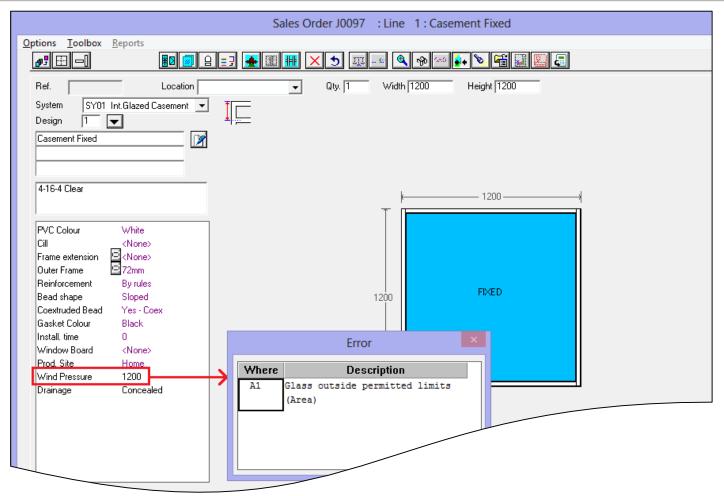
Enhancement to Options

Windload Calculations

Windowmaker has been enhanced to calculate the maximum permissible area for the applied glazing for the specified windload. If the area of the applied glazing exceeds the maximum permissible area calculated then the program either displays an error or automatically uses the 'next glass', if specified as such on the glazing record.

Refer help topic 'How to validate glass area for specified wind pressure' for details.





Error displayed by Windowmaker when applied glazing exceeds the maximum permissible area calculated

Sub-batching

Production Plan crystal report can now be generated even if 'Synchronise Sub-batches' setting is not selected.

Link to Saw

Windowmaker can now link to the following saws:

- Elumatec DG79-E355
- Sturtz SD7000
- Urban LA2630
- Murat TT405 Siemen

Link to LogiKal

Windowmaker has been enhanced to import and store the BOM details for a LogiKal Sales Line. This enables a host of Windowmaker facilities, listed below, to work for LogiKal Sales Lines.

- <u>Stock Control</u>
- Production Scheduling
- Purchase Scheduling
- Delivery Scheduling
- Installation scheduling
- <u>Sub-Batching</u>
- Bar Optimization
- <u>Tracking</u>



Pre-requisites for Upgrading

Windowmaker 2012 R3.2/R3.3

Please refer to the <u>Release Notes</u>, which document important behaviour changes, which are introduced in this version. These must be read in order to understand how they might affect your installation & upgrade process.

If you are upgrading from a version prior to Windowmaker 2012, please also refer to the consolidated <u>What's</u> <u>New</u> and <u>Release Notes</u> documents on our <u>website</u>.

General Enhancements

Order Acknowledgment

This is now enhanced to print the total Deposit value, if specified.

Invoice

This is now enhanced to print

- Deposit, if specified on the Sales Order
- Settlement Discount and 'Invoice Total after Settlement Discount' values, if applicable

Purchase Order

This is now enhanced to print the supplier Discount, if specified. Supplier Discount can be specified on the Costhead as shown below:

	Costhead:						
Costhead No.	1						
		-				-	
Description	Main profiles	Туре	Componer	nts (Stocked)	-	- L	
- Costing Exclude			+/-	%	-30.0	7	
Exclude	Normal			rnative	-30.0		
			Alte	mative		r	
Supplier	PSUP1 : Profile Supplier 💌				–		
Pricing							
_		B		- C			
	Exclude	Exclude		Exclude			
Mark-up %	0.0	-100.0		-100.0			
Extras	No	C No		C No			
	C Detail	C Detail					
	C Total	0.000					
	> Tuai	Purchas	e Order				
Windowmaker Meadway House, 17, Brighton road, Surbiton Surrey, KT6 5LR		Purchas	e Order				
Meadway House, 17, Brighton road, Surbiton Surrey, KT6 5LR		Purchas				Due Date	
Meadway House, 17, Brighton road, Surbiton Surrey,	Order Date	Purchas	Order Ref.			Due Date 30/10/201	
Meadway House, 17, Brighton road, Surbiton Surrey, KT6 5LR P.O. No.	Order Date 24/10/2013		Order Ref. J0046)ty.	30/10/201	3
Meadway House, 17, Brighton road, Surbiton Surrey, KT6 5LR P.O. No. Stock No.	Order Date 24/10/2013 Description	Purchas	Order Ref. J0046 Qty Unit	۵	Nty 05 11	30/10/201 Rate	3 Va
Meadway House, 17, Brighton road, Surbiton Surrey, KT6 5LR P.O. No. Stock No. OL056-WHT	Order Date 24/10/2013 Description Outer Frame		Order Ref. J0046 Qty Unit 1 Bar	Q 11	05 10	30/10/201 Rate 00.00	3 Va 10,500
Meadway House, 17, Brighton road, Surbiton Surrey, KT6 5LR P.O. No. Stock No.	Order Date 24/10/2013 Description		Order Ref. J0046 Qty Unit	Q 11 11	05 10	30/10/201 Rate	3 Va 10,500 10,000
Meadway House, 17, Brighton road, Surbiton Surrey, KT6 5LR P.O. No. Stock No. OL056-WHT	Order Date 24/10/2013 Description Outer Frame		Order Ref. J0046 Qty Unit 1 Bar	Q 11	05 10	30/10/201 Rate 00.00 00.00	



Currencies

Currencies

- ▲ Can now be set-up using a grid based Set-up form.
- Are now migrated and stored in a new WMCurrency table of WMDATA database

For a currency, you can now specify

- Description of up to 20 characters.
- A currency symbol of up to 3 characters (e.g. \$, CAD, £, €, ₹ etc.). If specified, the symbol is output on customer documents and sales analysis reports. If no symbol is specified for the 'home' currency, then it uses the currency symbol and other details from the Regional Settings of your computer.
- ▲ Up to two codes to map the currency set-up in Windowmaker with the ones in your accounting system. These can be used for transferring data to your accounting system (e.g. Sales Invoice Transactions) using any type of 'link' (e.g. an external utility or a crystal report generating a file that can be imported into the accounting system, using WMDATA database directly to transfer information).

V		Cı	urrencies	×	😼 Cu	rrency 1: Dollar	×
1		X 🖗 °		•	ID Description Symbol	1 Dollar S	
и 9	D Description	Symbol	Decimal Places	Exchange Rate	Decimal Places	-	
Þ	1 Dollar	\$	2	1	Exchange Rate	1.0	
	2 Canadian Dollar	CAD	2	1.03	Accounting Sys	tem	
					Code 1	USD	
					Code 2]	
					ок	Cancel	34

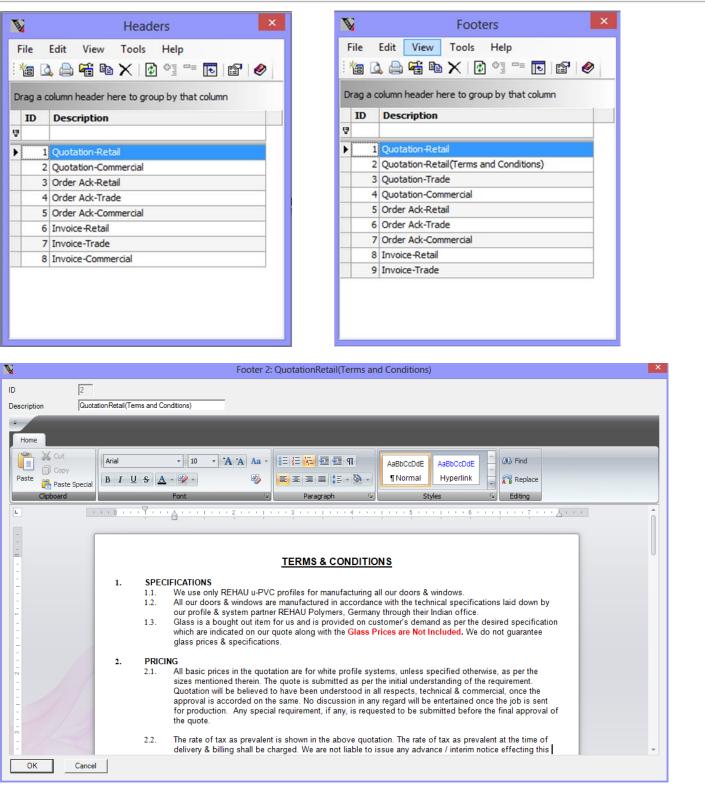
Document Headers/Footers

Headers/Footers

- ▲ Can be set-up using a grid based Set-up form.
- Are migrated and stored in a new WMDocumentHeaderFooter table of WMDATA database

For a header/footer, you can now specify

- Description of up to 40 characters.
- Text using rich text editing features, to help make your customer documents look more professional and impressive.



WINDOWMAKER SOFTWARE

Multiline Texts

The new rich text editing features are now also available for the multiline texts. You can enter multiline texts for:

- Extended description, production note and installation note for Sales Lines
- Extended description for Stock records
- Extended description for products setup in 'Non-window/door Products' module



Production Document

▲ The identical glass and panels are now collated.

Parts - Cost 'not specified'

It is now possible to set-up a part with cost set as 'not specified'. Using such a part either in a window/door or selling it directly will result in an error. You can set the cost for such parts in order to use these. This will ensure that you always calculate accurate and complete costing for a window/door. You can also set cost of a part to 'not specified' to prevent it from being used any more.

Import Catalogs

When importing a catalog you can now prevent data specific to you from being overwritten. At the time of importing you can choose:

- To retain your current costs and/or other fabricator specific data OR overwrite it with defaults from the supplier of the catalog.
- For new products, whether to import default costs or set it as 'not specified'. If latter, you will not be able to use such a product until you specify a cost.

V	Import (XML): W	/SLDEM	×
For New Pro	s 'Not Specified'			
Replace	Source C Profile Sys	-	Destination Catalog Profile System Data	
Import	Cancel			

'Unused' parts list

When modules migrated to database, you can now list all the unused parts from the Products Setup Form. These are parts which are not referred in any System/subsystem rules. Filtering the list to see <Unused> parts can server as a check to verify that all parts are used.



Rules - New 'Where' choices

New 'Where' choices have been introduced to reduce the number of rules required:

Use 'Where' choice/Test	in a rule at level(s)	Note
Detail		
Top, Left, Right	Overall, Frame, Sash, Glass	
Handle side	Sash	The side that normally opens. This is not always the location for a handle.
Hinge side	Sash	The side opposite the Handle side. This is not always the location for hinges.

Sys	stem SY01 : Rule 1
Rule Type 1 : Part Description	Level 3: Sash 💌
D0- Use: Matrix 1 : 0F50 Quantity © Quantity © Quantity © Option Adjustment Equally Split Option Size © 0.0000	☐ [++] End Types
Where 25: Handle Side Image: 0 : <none> 1 : Top 2 : Bottom 3 : Left</none>	
Condition 4: Right ndition 5: Top, Bottom 5: Top, Bottom Add 6: Left, Right 7: All 4 Sides Edit 9: Transom 10: Mullion 11: Transom, Mullion 23: Top, Left, Right 24: Hinged Side 25: Handle Side OK	Detail [++] Image: Constraint of the second secon

Rules - Test on Pane Types

The test on Pane Types has been extended to test:

- All pane types of a Pane Type Class
- All 'Left' or 'Right' handing pane types of a Pane Type Classin the same rule.

Earlier, it was only possible to test upto 4 specific pane types in one rule. This usually led to writing multiple rules for the same thing with tests on different pane types.



		Condition			×
Condition Pane Type	в	•			
🗖 Not					
-Detail- Pane Type Class		Handing		Pane Type	
6 : Top-hung Casement (Av 💌	⊙ All	C Left	C Right	<alb td="" 👻<=""><td></td></alb>	
8 : Side-hung Casement	O All	C Left	C Right		
<none></none>	C AI	C Left	C Right	_	
<none></none>	C AI	C Left	C Right	_	
1					
O <u>K</u> Cancel					

Longer product descriptions

If module data migrated to database, it is now possible to provide

- Description for parts up to 20 characters, instead of 18 characters.
- A new extended/longer description for parts, part matrices and systems of up to 40 characters; apart from the existing (short) description.

It will also be possible to set/update the long description for parts using:

- Export/Import Updates
- Export/Import Products (.CSV)

Currently, the long description can only be set, but it is not displayed/output anywhere. However, it is stored in the WMBom.Description2 column. You can use this to output in any custom reports.

There are different ways in which the descriptions can be used:

- 1. Display/Output both short and long descriptions
- 2. Choice of either short or long descriptions to use, at certain places
- 3. An application level choice of whether to use short or long description at all places

The major constraint is the availability of space at places where the description is displayed/output. To implement it in the way that is most useful it has been decided to defer use of long description until we receive proper feedbacks/requests from users. Please write to us at <u>info@windowmaker.com</u> with your views.

Copy Price Matrices to Cost Matrices/Printing Price Lists when modules migrated to database

If module data migrated to database, Price Matrices can now be copied to a product costed using a cost matrix. The cost matrix can then be printed to print the price list.

A Price Matrix is essentially a price list for a particular product configuration. In future, all the Price Matrices will be converted to products costed using a cost matrix.

New Pane Type Classes for door slabs

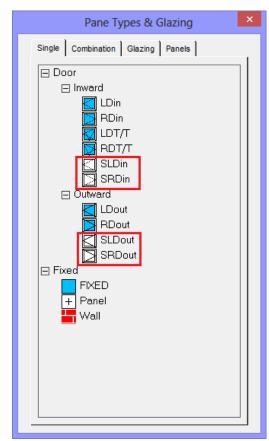
It is now possible to create Pane Types suitable to door slabs using the following new Pane Type Classes:

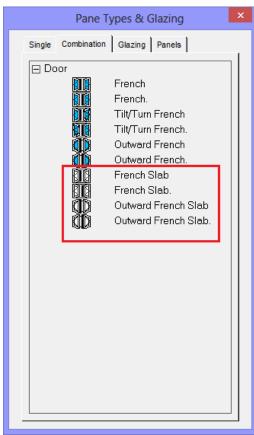
- Slab Door (Inward)
- Slab Door (Outward)
- Slab Door Slave (Inward)
- Slab Door Slave (Outward)

This makes the data set-up and use of door slabs easier and more realistic. Following new combination pane types are also available to easily create French doors using door slabs:



- 1. French Slab
- 2. French Slab.
- 3. Outward French Slab
- 4. Outward French Slab.





For Single Pane Type

For Combination Pane Type

Setting up Operations for Fittings

It is now possible to set-up parts corresponding to Operations for the fittings in the Fittings Data module(s). This allows a Fitting Ecatalog to also contain the rules for related operations.

Product Version

Windowmaker product versioning is now changed from 'Major.Minor.Flag.Revision' to 'Major.Minor.Revision' convention. The 3rd digit in the version number is removed for simplicity purpose. The product version is displayed on the splash screen displayed at the product start-up or in the Help About form. Refer Help file for details.





Enhancement to Options

Link to CAD I/II, Conservatory

Windowmaker now supports IntelliCAD v7.2. This can be used as an economical alternative toAutoCAD.

Pricing Extras

Negative costs in Cost Matrices

If module data migrated to database, the program now also allows inputting negative costs in Cost Matrices for Pricing Extras parts. This could be useful to give discounts at a Sales Line level in specific conditions.

Costs	each	•			
Width	1000		1000		
Height	1000		1200		
1000	-	10.00		-12.00	1
1200	-	12.00		-12.50	L
			-		

		_ □			
				Summary	
Description	Nett	Mark-up	Curr. List	List	Actual
Price List 1	680.00	0.00	680.00		
Subtotal	680.00	0.00	680.00	680.00	680.00
Discount %			0.00	0.00	0.00
Total			680.00	680.00	680.00
Summer Promotion	-59.99	0.00	-59.99		
Subtotal	-59.99	0.00	-59.99	-59.99	-59.99
Discount %			0.00	0.00	0.00
Total			-59.99	-59.99	-59.99
Total			C20.04		

FIG 2: Sales Header Pricing Page - Calculating 'Pricing – Extras' with negative values



Windowmaker Wind Unit A - 115, Wolseley Street	ows	Qı	uotation				
Toronto							
ON M6J 1K1 Canada							
Tel. +1 (416) 762 5299 Fax							
Email info@windowmaker.co	m		Della				
То			Delly	/er to			
Mr. John Doe Block A - Window Street Toronto ON N6A 1K2 Canada				k A - Wind nto ON Ne ada			
Quote No.	Date		Customer Re	ef.		Re	esponsible
Q0015	9/25/2013					SU	PERVISOR
Sales Line	Deta	ils			Qty	Rate	e Amoun
	1000 4-16 PVC Han Coe: Drai Sum	Turn L)w x 1000h -4 Clear Colour dle Colour ktruded Bead nage mer Promotion mer Promotion	White White Yes - Coex Concealed		1	-59.99	
Viewed from Outside		mer Promouon			1	-59.99	
				Total			620.0
				Standard		20.00 %	
				Grand To	4-1		744.0

FIG 3: Quotation

Optimaker

Optimaker reports are enhanced to output the Glass trolley/slot number when a Production Batch is subbatched. The trolley/slot numbering is consistent with the frame sub-batching sequence. This will make it easy to identify glass for a particular frame/sash at the glazing station.

Link to Saw: Generic

The Windowmaker generic Link to Saw is now also available for running

- On computers running 64 bit operating system
- With 32-bit bar optimization

Link to LogiKal

Windowmaker now links to Logikal 8.1, the latest release.



Windowmaker 2012 R3.1

Pre-requisites for Upgrading

Please refer to the <u>Release Notes</u>, which document important behaviour changes, which are introduced in this version. These must be read in order to understand how they might affect your installation & upgrade process.

If you are upgrading from a version prior to Windowmaker 2012, please also refer to the consolidated Release Notesdocument on our <u>website</u>.

General Enhancements

CE Marking labels

Beginning July 2013, CE markingof window/door products is mandatory for manufacturers marketing in the European Economic Area (EEA). To facilitate the users to meet this statutory requirement it is now possible to generate sleek professional labels with CE marking from Windowmaker.

CE	Your logo here	CE	Your logo here	CE	Your logo here	CE	Your logo here
Windowmaker Windows Meadway House 17 Brighton Road Surbiton, Surrey KT6 5LR UK		Windowmaker Windows Meadway House 17 Brighton Road Surbiton, Surrey KT6 5LR UK		Windowmaker Windows Meadway House 17 Brighton Road Surbiton, Surrey KT6 5LR UK		Windowmaker Windows Meadway House 17 Brighton Road Surbiton, Surrey KT6 5LR UK	
2013		2013		2013		2013	
Notified body		Notified body		Notified body		Notified body	
BS EN 14351-1:20	006+A1:2010	BS EN 14351-1:20	006+A1:2010	BS EN 14351-1:2	006+A1:2010	BS EN 14351-1:2	006+A1:2010
DoP No.		DoP No. 1		DoP No		DoP No.	
AWN-002- DGU-Awnin Intended use for Com	g-SY1	DIN-004-D DGU-Door I Intended use for Com	n-SY1	CAS-001- DGU-casem Intended use not on	ent-SY1	AWN-002 DGU-Awnin Intended use for Com	ng-SY1
Resistance to windload	Class 5	Resistance to windload	Class A2	Resistance to windload	Class 5	Resistance to windload	Class 5
Water tightness	Class 7A	Water tightness	Class 5A	Water tightness	Class 7A	Water tightness	Class 7A
Dangerous substances	No	Dangerous substances	No	Dangerous substances	No	Dangerous substances	No
Load-bearing capacity of safety devices	350 N	Load-bearing capacity of safety devices	NPD	Load-bearing capacity of safety devices	350 N	Load-bearing capacity of safety devices	350 N
Acoustic performance	NPD	Acoustic performance	NPD	Acoustic performance	NPD	Acoustic performance	NPD
Thermal transmittance	1.7 W/(m2.K)	Thermal transmittance	1.7 W/(m2.K)	Thermal transmittance	1.7 W/(m2.K)	Thermal transmittance	1.7 W/(m2.K)
Radiation properties	NPD	Radiation properties	NPD	Radiation properties	NPD	Radiation properties	NPD
Air permeability	Class 2 (300 Pa)	Air permeability	Class 2 (300 Pa)	Air permeability	Class 2 (300 Pa)	Air permeability	Class 2 (300 Pa)
		Ability to release	Panic H/W complies EN179				
J00008/0001		J00008/0002		J00008/0003		J00008/0004	
	00000013000100		00000014000100		00000015000100		00000016000100

Label Size: Each Label is of size 192mm x 62mm. 4 labels per A4 sheet, to be fed in Landscape mode to the printer.

Label Stationery: Avery reference L7701

Please contact your Windowmaker supplier or write to <u>help@windowmaker.com</u> for more details on CE Labels.



Options of type 'Value':

You can now setup Options, memory variables or otherwise, whose answers are numeric values with up to 3 decimal places. This allows specifying actual values for answers that can be fractional values. (e.g. Variable clearances, Thermal Transmittance, U-value)

Options 'Mixable by Frame':

It is now possible to setup Options that are 'Mixable by Frame'. This means that each frame in the window/door can have a different answer for that option. Presently, only memory variable type Options can be 'Mixable by Frame'. The answer for such options, for a frame, can be printed on crystal reports.

Apart from these facilities being generally useful, these are required to setup data for CE Labels.

eader Answers Where Used	
Description Therm Transmitt	
Memory Variable	
Type Value (.#)	
Prompt Value 1	
Format Code Value (.#) Value (.##)	
C Part Group Value (.###) uantity C Yes/No C Size	
Format Code	
Finish C Outside	
Costhead C Both	
Optional Minimum Minimum Maximum Maximum	
💌 Auto & Hidden	
Mixable Answers C Not Mixable Base Part No.	
Not Mixable Sides By Features	
C Mixable by Transom/Mullion	
C Mixable by Level	
Mixable by Frame	
Adjustments Affected	
🗖 Overall Clearance 🔲 Other	

'Locking' constraints relaxed:

The 'locking' constraints have been relaxed. Hence it is now possible for users to setup data simultaneously while other users are:

Doing Order Entry Running Batch Processes

Earlier this was not possible. Hence it required all users to stop order entry or running processes in order to do even minor modifications to any setup data.



Include/Exclude Options setting for crystal reports

The crystal report settings 'Include Options' and 'Exclude Options' now allow specifying a range of Option numbers. These settings are available in Production Document, Quotation, Order Acknowledgement, Invoice, Survey Sheet, Wallchart, Frame Labels and 'Sales Analysis (Export to Excel)' reports.

These settings are now also available for the Ladders Document report.

E.g. The example below shows that options 1 to 5, 7 to 10, 12, 14 and 16 should be printed in the report:

	Settings	×
Print each Sales Line on new page	Print each Frame separately	
Customer Reference	✓ Include Dates	
Sizes <default></default>		
Sales Line Graphics < Default> <	Suppress Graphics details 0	
Viewed from <a>CDefault>	Include Dimensions Internal	
Print Options 1-5; 7-10; 12; 14; 16	Exclude Options	
✓ Part List	🖂 Labour	Position Identifier
🔽 Glass List	✓ Panel List	
<u>D</u> K Cancel <u>S</u> ave as Default		

Enhancements to Windowmaker ERP (NAV)

- The 'Synchronise (Sales)' and 'Synchronise (Inventory)' processes are now optimised for better performance and hence faster.
- Users are no longer required to stop order entry while the 'Synchronise (Sales)' process is being executed.



Windowmaker 2012 R3

General Enhancements

Running a Crystal Report on multiple Sales Lines

It is now possible to run a Sales Line report on multiple Sales Lines. A separate report will be generated for each selected Sales Line.

P					Sale	es Quote FRONTVAR: A	rdent Window	S	: Input		
	Lines	Photo Fronts	Work In Progress Histor	У							
		N	ew	Edit	Progress	Reports	Tools	Purchases		View	
		Curtain	Wall +STD +Part +RW	🗃 Open 🗙 Delete	1	📄 Sales Header Reports 🗸		j 🕅	호텔 Expand 💽 🖡	Restore Defaults	🛕 Print Preview 👩
		Glass	+Stock +Man	🖺 Copy 🛅 Select All	3√ Progress	Sales Line Reports 👻	Global Changes	Purchases	📼 Collapse 😭 (Customise Appearance	e 📄 Print 🛛 💦 Refre
	rag a column header here to group by that column				<u>1</u> WM_Cill Cutting P	an					
Dra	ag a colun	nn header here t	to group by that column			2 WM Ladders Docu	ment				
L	Line	System	Description	Size		3 WM Production D			Nett		
C			Casement F.F.F	1199 x 1000					690.00		
0	002	SY04	Residoor L	950 x 2100		4 WM_Roof Cutting	List		1176.98		
•	0003	SY01	Casement F.T/F	1000 x 1000		5 WM_Roof Cutting	List (Timber)		1327.67		
0	004	SY01	Casement Fixed	690 x 1000		<u>6</u> WM_Sales Line Hea	ader		560.00		

Easier maintenance of Module/Catalog data

If modules migrated to database, the program now displays the module data in grid based setup forms. This has made working with and the maintenance of Parts, Matrices and Systems/Subsystems quicker and easier.

2		<main></main>					
<u>F</u> ile <u>E</u> d	it <u>V</u> iew <u>T</u> ools <u>H</u> elp						
New Part	New Matrix New System	• 🚨 🚔 🔚 🖻 🗙 😰 🖭 "	= 💽 😭 🤣				
<all></all>							
	rt Matrices Systems						
	It Matrices Official						
Drag a col	umn header here to group by	that column					
ID	Product No.	Description	Туре				
9							
▶ 10	00001 SY01	Int.Glazed Casement	System (Designs)				
10	00002 SY02	Ext. Glazed System	System (Designs)				
10	00003 SY03	Tilt & Turn Windows	System (Designs)				
10	00004 SY04	Int.Glazed Doors	System (Designs)				
10	00005 SY05	Ext.Glazed Doors	System (Designs)				
10	00006 SY06	Tilt & Slide Patio	System (Designs)				
10	00007 SY07	Inline Patio Doors	System (Designs)				
	00008 SY08	Curtain Wall	System (Designs)				
10			Sustan (Decises)				
	00009 SY09	Dual Finish	System (Designs)				



ew Pa All> s	art Nev Part Matri		• 4 6 6 8 × 1 0 °i				•
Гуре	Δ	Product No.	Description	Costhead	☑ Cost	Unit Desc.	
ID		Product No.	Description	1: Main profiles	🗠 Cost	Unit Desc.	
	614	ТТ070-В/*	Transom/Mullion T	1: Main profiles	2.26	Metre	
-		TZ070-WHT	Transom/Mullion Z	1: Main profiles		Metre	
-		TZ070-BRN	Transom/Mullion Z	1: Main profiles		Metre	
-		TZ070-2/*	Transom/Mullion Z	1: Main profiles		Metre	
		TZ070-L/*	Transom/Mullion Z	1: Main profiles		Metre	
-		ST075-WHT	T-Sash (C'mnt)	1: Main profiles		Metre	
	621	ST075-BRN	T-Sash (C'mnt)	1: Main profiles	3.26	Metre	
	622	ST075-2/*	T-Sash (C'mnt)	1: Main profiles	4.77	Metre	
	623	ST075-L/*	T-Sash (C'mnt)	1: Main profiles	3.69	Metre	
	624	STABLE	Stable Sash	1: Main profiles	3.69	Metre	
	625	SZ112-WHT	Door Z-Sash	1: Main profiles	4.50	Metre	
	626	SZ112-BRN	Door Z-Sash	1: Main profiles	5.15	Metre	
	627	SZ112-2/*	Door Z-Sash	1: Main profiles	7.53	Metre	
	628	SZ112-L/*	Door Z-Sash	1: Main profiles	5.82	Metre	
	629	SZ112-B/*	Door Z-Sash	1: Main profiles	5.82	Metre	
	630	SZ078-WHT	Window Z-Sash inw.	1: Main profiles	3.50	Metre	
	631	SZ078-BRN	Window Z-Sash inw.	1: Main profiles	4.01	Metre	
	632	SZ078-2/*	Window Z-Sash inw.	1: Main profiles	5.85	Metre	
	633	SZ078-L/*	Window Z-Sash inw.	1: Main profiles	3.88	Metre	
	635	ST112-WHT	Door T-Sash	1: Main profiles	4.50	Metre	
< 🗸		ST112-BRN	Door T-Sash	1: Main profiles	5.15	Metre	

Support to Independent Part Matrices when modules migrated to database

Windowmaker supports two types of Part Matrix:

- 1. **Independent** This is the traditional type used before modules were migrated to the database. The key advantage is that a single matrix can be used by multiple rules.
- 2. **On-rule** This type was introduced when modules were first migrated to the database. The key advantage is that the matrix is part of the rule, can be edited from within it and is copied with it.

Even if modules migrated to database, you can now create Independent Part Matrices. This eliminates the need to duplicate On-rule matrix across multiple rules, which made maintenance of matrices difficult. When modules are migrated to database, all Independent matrices are converted to either Independent or On-rule matrices as appropriate.



÷	le <u>E</u> dit <u>V</u>	<u>(</u> iew <u>T</u> ools <u>H</u> elp			
N	lew Part Nev	w Matrix New System	ؙ 🚔 🖼 🔚 🖻 🗙 🛛 🔂 🐏 ⋍	E 🛐 🤌	
<	All>				
· ·		,,			
ar	ts Part Matr	ices Subsystems			
Dr	rag a column h	eader here to group by that	column		
	ID	Product No.	Description	Туре	
Ð					
	600001	PT00001	Cockspur Handle RH	Unit	
	600002	PT00002	Cockspur Handle LH	Unit	
	600003	PT00003	Espag Handle RH	Unit	
		PT00004	Espag Handle LH	Unit	
	600004		Casement Espag Rods	Unit	
•		PT00005			

Where duplication not required you can still use the On-rule matrix, with the flexibility to convert it to an Independent matrix later on if there arises a need to duplicate it across rules.

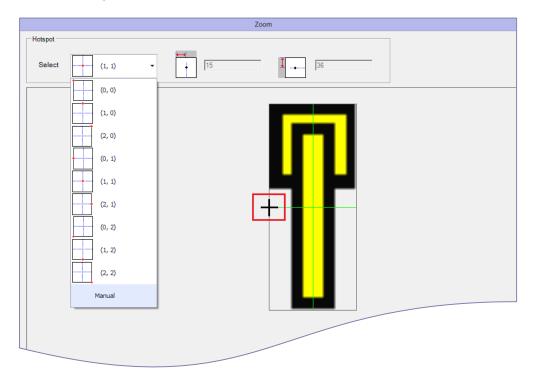
						Pa	art Matrix			×
				Cells			Current Cell			
Catalog	Fittings Data		6	Format Code	1 : Unit	-	Option	<none></none>		
Stock No.	PT00006	_		Costhead	8 : Fitting Supplier1	-	Part	IIIIIIIE 🔽		
Description	Casement TH Hin	ge		Cell Type	Part	-	Use Part No. for Selection	Apply		
TH Hinge Type		_								
Length	Standard	Security								
249	!!!!!!!E	IIIIIIIE								
350	8" TH Std	8" TH HS	_							
450	10" TH Std	10" TH HS	_							
600	12" TH Std	12" TH HS	_							
800	16" TH Std	16" TH HS	_							
1050	20" TH Std	20" TH HS	-							
1250 9999	24" TH Std	24" TH HS	-							
<u>ok</u> C	ancel <u>C</u> on	vert to Product							Import Export	



'Hotspot' co-ordinates in Product image

'Hotspot' is a point/co-ordinate on the Product image. The 'hotspot' in this image is aligned with the position calculated/defined for displaying the product graphics on the Sales Line graphics. Specifying a 'hotspot' on the Product image is now easier.

Selecting a 'hotspot' for the special 9 positions (viz. centre, corners and middle of sides) in the image is easy. Just select a correct one from a drop-down list or click when the cross-hair cursor appears when hovering over the image in the vicinity of these 9 positions.



Glazing Specification

On the Glazing Specification dialog, changing the Supplier now retains the current glazing specification. Earlier, this was lost and hence needed re-inputting.

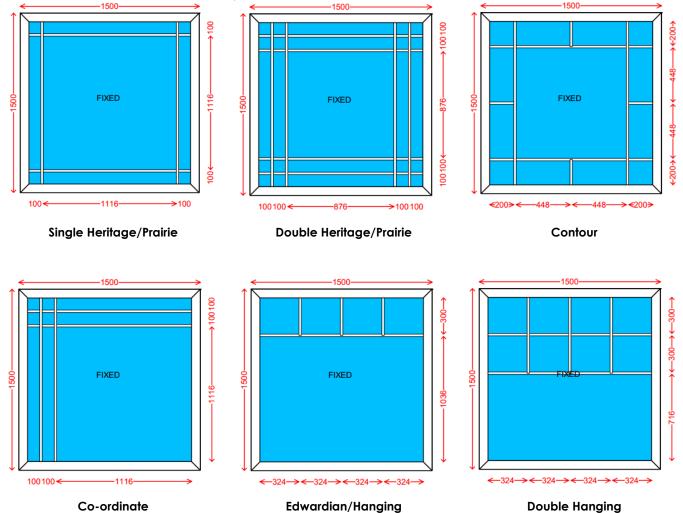


Enhancement to Options

Georgian Grids

Applying standard grid patterns with minimal effort

It is now possible to setup some of the most popular grid layouts (see examples below). Applying these to windows/doors at order entry is now just a few clicks.



Restrict changing the grid layout at order entry

It is now possible to indicate on a grid layout whether it can be modified at order entry or not. This can help prevent configuring windows/doors with unwanted/undesirable grid layouts.

Grid Wizard

The Grid Wizard helps quick application of a grid pattern to a Sales Line. It is now further simplified to make the process even more user-friendly and quicker.

Grid Wiz	zard
Grid Type Between leaves Pattern 554 :Bet leaves (Brown) Top Grid- Spokes Hubs	Vertical Bar Type 10.0 Quantity/Positions O Loge C Equalise Move Mullions O Aim for Grid Width O O No. Grids O
No. of Segments 0 Full Segments C Omit Central Spoke C Borders Offset Fill Image: Control of the second of the secon	
Horizontal Bar Type 10.0 Crucifix Width 0 Crucifix Height 0 Quantity/Positions No Change Move Transoms Aim for Grid Height 0 No. Grids 0 C No. Grids 0 C Cancel	

WINDOWMAKER SOFTWARE

<u>Sunburst</u>

Applying sunburst and starburst grid layouts is now easier and quicker. It is now possible to setup grid layouts with 'Full Segments', 'Omit Central Spoke' and 'No. of Hubs'.

<u>Leaded</u>

Leaded Displacements Crystal Report

A new 'WM_Leaded Displacements' crystal report is now available. The report output can be used at the station on the production floor where leading is applied to the glass.



Sample report output:

Leaded Displaceme	nts	ABC Windows		15-05-2013
J0046 / 0001 ME01 Merlin Windows		1/ LEADED		Qty 1
System Design Description Size	SY01 Int.Glazed Casement 28 Casement T/L F 1200w x 1200h		Here the second	
Description		Qty	Size	Position
6-12-6 Clear Toughened	Diamond Leaded	1 1 1	483w x 383h 473w x 1086h 483w x 483h	G.A1/1 G.B1/2 G.A2/3
J0046 / 0002/ Frame 1 ME01 Merlin Windows		1/ LEADED		Qty 1
System Design Description Size	SY01 Int.Glazed Casement 5 Casement Left 1000w x 1200h		796 102 102 102 102 102 102 102 102	
Description		Qty	Size	Position
6-12-6 Clear Toughened E J0046 / 0002/ Frame 2 ME01 Merlin Windows	Diamond Leaded	1 1/ LEADED	796w x 996h	1/G.A1/1 Qty 1
System Design Description Size	SY01 Int.Glazed Casement 51 Casement T/F 1000w x 1200h		886 55 57 57 57 57 57 57 57 57 57	
Description		Qty	Size	Position
6-12-6 Clear Toughened E	Diamond Leaded	1 1	796w x 248h 886w x 738h	2/G.A1/1 2/G.A2/2

Refer 'How to use Diamond Leaded Patterns' and 'Leaded Displacements Report' help topics for details.

If you want to output Sales Line graphics with leaded displacements on a custom crystal report you can use the WMSalesLinePicture UDF with DimensionType parameter indicating 'Leaded Displacements'. Refer 'Windowmaker User-defined Function Library (UFL) for Crystal Reports' for details.

Purchase Ordering and Glass Export (A+W)

You can now generate electronic Purchase Orders for glass in the format required by Albat+Wirsam (A+W) in their most recent format (v02.02.016). The Purchase Order can be sent to your supplier who can import it



directly into the A+W order system. Alternatively, the purchase orders can be automatically uploaded to a FTP site of your supplier.

	Supplier GSUP1: Double Glazing Suppliers
Reports	
Header Inventory De	etails Transactions
Supplier No.	GSUP1 Name Double Glazing Suppliers
Address	35 Bonnyside Road Street Address Bonnybridge Town/City Bonnybridge County/State/Province Stirlingshire Zip/Postal Code FK4 2AD Country
Reference	
Tel.	349210
Fax	321308
Email	Glasspot@jobway.co.uk
Currency	1:
Туре	Glazino Supplier
Purchase Order Format	XML Shape Authority A+W
Output Method	None Crystal Report A+W Pilkington XML XML(XSD) A+W (v02.2.016) <custom></custom>
<u> </u>	Cancel

Purchase Ordering and XML Electronic Glass Order

You can now extend Windowmaker to generate Glass Purchase Order in a custom format (i.e. one not directly supported by Windowmaker). This requires a .NET post-processor assembly to be developed and associated with the Supplier. The post-processor can be developed by you or a 3rd party developer or Windowmaker.

Refer 'How to generate a Glass Purchase Order in custom format' help topic for more details.



	Supplier	GSUP1: [Double Glazing Suppliers	×
Reports				
Header Inventory Deta	ails Transactions			_
Supplier No.	GSUP1	Name	Double Glazing Suppliers	
Address	35 Bonnyside Road Bonnybridge Stirlingshire FK4 2AD		Street Address Town/City County/State/Province Zip/Postal Code Country	
Reference				
Tel.	349210			
Fax	321308			
Email	Glasspot@jobway.co.uk			
Currency	1:		Y	
Type Purchase Order	Glazing Supplier		▼	
Format	<custom></custom>		Shape Authority Windowmaker	
Output Method	Disk File		▼ Sizes Metric ▼	
Processor Name	Sample			
	ancel			

Optimaker

Optimaker (Windowmaker's native glass optimisation logic), and related processes, is now also available for running

- On computers running 64 bit operating system.
- If modules data migrated to database

Link to Saw

Windowmaker can now link to LGF Gamma saw.

Link to Welder

Windowmaker can now link to Urban AK\$1900 4-Head welder.

Link to Stock

Link to Stock is now also available for running

- On computers running 64 bit operating system
- With 32-bit bar optimisation



Stock Control

New 'Transactions' tab for Production Batch

If using Production Scheduling you can now view all stock transactions for a Production Batch using the new 'Transactions' tab.

ype Stock No.: D6 Issue Deallocation	Reference1 508 20	Reference2	Quantity	Due Date	Date	V	
Issue		110040/0809					
	20	1100/0/0000					
Deallocation		3100 4 0/PB08	1.81003		30-05-2013		
	PB08	J10040	2.08436		30-05-2013		
Issue	20	SO-1259/PB08	28.18997		30-05-2013		
Deallocation	PB08	SO-1259	32.46254		30-05-2013		
Allocation	PB08	J10040	2.08436	30-05-2013	24-05-2013		
Allocation	PB08	SO-1259	32.46254	30-05-2013	24-05-2013		
Stock No.: DS	SAH10						
Issue	20	J10040/PB08	8		30-05-2013		
Deallocation	PB08	J10040	8		30-05-2013		
Issue	20	SO-1259/PB08	40		30-05-2013		
Deallocation	PB08	SO-1259	40		30-05-2013		
Allocation	PB08	J10040	8	30-05-2013	24-05-2013		
	PB08	SO-1259	40	30-05-2013	24-05-2013		
Allocation	FDUO						
Allocation Stock No.: DS							
		SO-1259/PB08	36		30-05-2013		

If not using Production Scheduling you can still generate Allocation and Deallocation transactions for stock required for a Production Batch.

N	Pro	oduction Batch Home/PB08 30-05-2013
File Select Progress	Reports Help	
Sales Orders - Au	tomatically 🚽	Mlocate Stock 🔽 🚮 1 Frames 👻 🤣
Header Contents Pun	chases	Allocate Stock
		Deallocate Stock
Batch No.	1/PB08	<u>S</u> ub-Batch
Date	30-05-2013	Process
Capacity/Bottleneck		
Bottleneck	Maximum	Allocated



Link to LogiKal

Importing LogiKal Projects into Windowmaker

You can import existing LogiKal projects into Windowmaker as Sales Quotes/Orders. This is particularly useful if:

- you have just started using the Windowmaker Link to LogiKal facility and you want to import all live projects into Windowmaker
- for some reason you had to use LogiKal in a standalone mode and later on you want to transfer the projects created in the meantime into Windowmaker

The import of a Quote/Order achieves the same end-result as an input via order entry.

Advanced Data Setup Tools

Export/Import Products to CSV file

This is now enhanced to also include:

- 'Hotspot' co-ordinates for the Product image. You can either specify special 9 positions (viz. 'centre, corners & middle of sides') or absolute co-ordinates for the hotspot.
- (Optionally) Product graphics

V	Export Products (.CSV)	×	V	Import Products (.CSV)	×
Export To			Import From	testforxportgraphics.CSV	
Format Code	1: Unit	-			
🔽 Export Graph	ics		🔽 Import Graphic	cs	
Export	Cancel		Import	Cancel	



Windowmaker 2012 R2.1

General Enhancements

Windows Server 2012 for Windowmaker

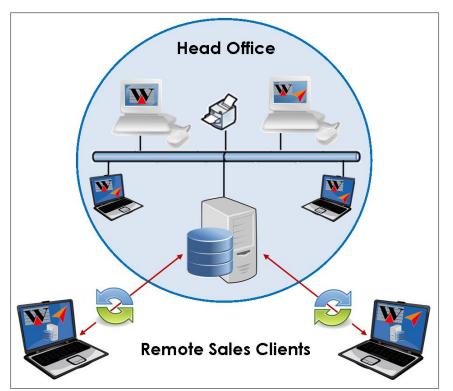
Windowmaker now supports running on Windows Server 2012 operating system.

Department Navigation Tree

You can now expand and collapse the Navigation Tree list using right (\rightarrow) and left (\leftarrow) arrow keys. This was already possible using the numeric '+' and '-' keys. However, this posed problems on laptops without a numeric keypad.

Synchronise LogiKal Sales Lines

Windowmaker SQL Sales Clients can now synchronise LogiKal Sales Lines with the central database.



Windowmaker SQL Sales Client synchronisation for Logikal Sales Lines

More systems per module

If module data has been migrated to the database, you can now create up to 9999 systems/subsystems in <Main>/other modules.

See 'How to know whether module data is migrated to database or not' topic in the Help file.

Export/Import Catalog

You can now

- Select a folder and specify a name for the XML file to which catalog(s) can be exported.
- ▲ Select a folder and XML file from which catalog(s) can be imported.

Crystal Reports – Preview

Due to problems with the Crystal Reports run time components pressing the 'Preview' button on the Crystal Report dialog caused Windowmaker to crash. Therefore the button is now replaced with 'Preview (PDF)' button. You will be able to preview the report output as a PDF on pressing the button.



Crystal Reports - Production Document

New settings are available on the Production document.

	Settir	ngs				
I✓ Print each Frame separately						
✓ Customer Reference	🔲 Include Dati	es				
Sizes						
Sales Line Graphics < Default>	Suppress Graph	iics details				
	Include Dimensi					
Print Options	Exclude Option:	s				
✓ Part List	🗖 Labour	Position Identifier				
🔽 Glass List	🔲 Panel List					
OK Cancel Save as Default						
<u>QK</u> Cancel <u>S</u> ave as Default						
Viewed From:		Graphics details:				
 <default></default> Inside 	Value	Effect on Sales Line Graphics				
 Inside Outside 	0	Nothing				
		Suppress Glass, Panels and Profile colour				
Include Dimensions:	2	Suppress Unit part images (e.g. Handles)				
Internal	4	Suppress Panel images				
 Internal + Georgian Sightline 	8	Suppress Glass Colour				
Overall + Internal + Georaian	16	Suppress Profile Colour				
	32	Output dimensions with one decimal place				
	64	Output dimensions with two decimal places				
	96 128	Output dimensions with three decimal places Round up dimensions to the specified decimal places				
	Specify st (e.g. '33'	um of values to make the corresponding settings effective i.e. 1+32 to bring both the corresponding effects on the graphics)				

Enhancement to Options

Link to Working Centre - Now works with 32-bit bar optimisation

If module data has been migrated to database, the Link to Working Centre process now works with 32-bit bar optimisation.

In addition to everything that 16-bit bar optimisation offers, the 32-bit one has following advantages:

- ▲ Works on a computer running 64-bit Operating System
- Allows multiple length bar optimisation. Refer How to use multiple bar length optimisation help topic for details.
- Allows variable length bar optimisation. Refer How to use variable bar length optimisation help topic for details.

Note: The 16-bit bar optimisation will be discontinued in a forthcoming release (expected release Q2 2013). It is recommended that you switch to using 32-bit bar optimisation if already possible. Refer **Effects of using 32-bit Bar Optimisation** topic in the Windowmaker Help file to help decide.



Windowmaker 2012 R2

General Enhancements

Windows 8 for Windowmaker

Windowmaker now supports running on Windows 8 operating system.

'Maximum Undercharge Percent' setting for Users

The program can now

- prevent Sales Reps. from undercharging a Sales Quote/Order
- authorise Sales Managers to provide higher discounts than Sales Reps.

For this, the Supervisor can specify an Undercharge% for each Sales Rep. and/or Sales Manager. This prevents them from selling at a price that exceeds the Undercharge%.

Any change to the Sales Header and/or Sales Line causing the Under/Over% to exceed the 'Maximum Undercharge Percent', specified for the logged in User, results in an error.

V		User 21: DEM1				
Delete Database <u>U</u> ser					Error	
	<all></all>		The calculate allowed limit		ercentage (5.00%) exce	eds the maximum
View Only Own Sal		2.00 % ×				ОК
	Payment 3:30 Days (30	Days Credit on Order)	List Discount % List Nett Under/Over Under/Over % tage (5.00%) exceeds the maximu	m allowed limit (2.00%) 4998.90	₽ (-2.00 %) 31 ★	
	After Settlement Discount Deposit Finance Value	6638.90 0.00	Contribution % Commission	86.26% 0.00		

Easier maintenance of costs for parts costed via 1D cost matrix

The maintenance of costs for parts costed via 1D cost matrix, indexed on an Option, is now easier and quicker using the Products Setup form. This allows directly updating costs within the grid in Windowmaker itself. This is only available when modules data migrated to database.

The answers of the selected Option are listed as columns. The cells are costs that can be directly edited.

Modified cells are shown in a different colour. Press 📕 to save the parts with new costs.

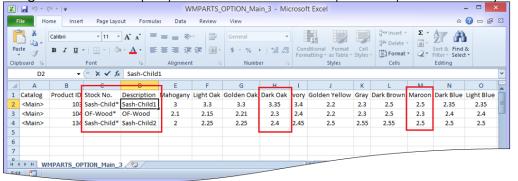
							Produ	icts				
е	Edit	: <u>V</u> iew <u>T</u> ool	s <u>H</u> elp									
3	Part	- 🛕 🖨 🖷	🖬 🖻 🗙 i 🖸	¢∃ == ∎	8							
		Finish 🔻	P 🖻 🕞 🦪 I									
ata	log	Δ										
ID		Product No.	Description	Unit Desc.	WHITE-141	WHITE-151	BEIGE	CLAY	STAIN INTERIOR	STAIN EXTERIOR	STAIN BOTHSIDE	FOIL/WHITE-151
	51	3002*	Window Frame	Ft	4.56	4.73	5.63	5.68	7.73	7.86	7.9	8.62
	52	3005*	Window Frame	Ft	4.89	4.96	5.89	5.94	7.89	7.98	8.26	8.89
	100	3225*	Picture Frame	Ft	5.63	5.7	5.81	5.86	8.32	8.69	8.96	9.35
	101	3227*	Picture Frame	Ft	5.78	5.8	6.19	6.24	8.5	8.7	8.8	8.85
	200	3300*	Slider Frame	Ft	6.39	6.5	6.81	6.86	8.83	8.9	9	9.68
	201	3320*	Slider Frame	Ft	6.58	6.69	7.09	7.49	8.93	9.36	9.65	9.88
	451	5770*	Glazing Bead	Ft	1.56	1.66	1.89	1.94	2.65	3.5	4.55	3.64
		5771*	Glazing Bead	Ft	1.59	1.68	2.35	2.4	3.65	3.66	4.56	4.85



Products Setup form enhancements

Using the Product Setup form you can now:

- Modify costs
 - Directly in the grid cells, for parts costed via absolute single cost OR using a 1D matrix indexed on an Option
 - By a % value, using 'Modify Costs by %'
 - Based on unit weight/perimeter/face, using 'Set Costs per Weight/Surface'
 - Import/Export Updates to a .CSV file, to update costs of parts easily and quickly using Microsoft Excel. See screenshot below illustrating costs for parts costed via a 1D matrix indexed on an Option exported to Microsoft Excel; and subsequent import of the same to update costs of the parts.
- Import/Export Products to a .CSV file, to easily and quickly modify numerous attributes of multiple parts using Microsoft Excel (Only if 'Advanced Data Set-up Tools' option available).



Modify Product information in Excel



B						Produ	cts							×
Eile	Edit View	Tools Help												
		🖷 🖩 🖻 🗙 🛛	• • • •	a 🖬 📣										
1														
3: 1	Foil 2S	• 📴 💷 🖓	B & 6											
C 1	talog 🛆													
IC	Product No	Description	Unit Desc.	Mahogany	Light Oak	Golden Oak	Dark Oak	Ivory	Golden Yellow	Gray	Dark Brown	Maroon	Dark Blue	Light Blue
2														
1.5	Ca <mark>tolog. «Main»</mark>		-					-					1	
•	108 Sash-Child*	Sash-Child 1	1 letre	3	3.3	3.3		1.4	2.2	2.3	2.5		.35	2.35
1	104 OF-Wood*	OF-Wood	Each	2.1	2.15	2.21	2.3	1.4	2.2	2.3	2.5	2.3	2.4	2.4
	134 Sash-Child*	Sash-Child2	Netre	2	2.25	2.25	2.4	1.45	2.5	2.55	2.55	2.5	2.5	2.5
-	Catalog: Profile S	vstem Data				· •					· · · ·			
	600 OL056-WHT	Outer Frame	Metre	2.5	2.25	2.4	2.6	3	3	3	3.1	3.1	3.2	3.2
	610 TT070-WHT	Transom/Mullion T	Metre	3	3.25	3.25	3.25	3.5	2.3	2.3	2.3	2.3	2.3	2.3
	635 ST112-WHT	Door T-Sash	Metre	2	2.5	2.5	2.75	3	3	3	3	3	3	3
	651 TT090-BRN	Transom/Mullion	Metre	3.25	3.25	3.25	3.75	3.75	2.65	2.7	0.00			
_	660 TT090-BRN	Transom/Mullion	Metre	3	3.25	3.25	3.75	2.0	-					

Modified Product information indicated in blue cells

8				Р	roducts	;
<u>File E</u> dit <u>V</u>	(iew <u>T</u> ools <u>H</u>	elp				
懎 Part 👻 🗋	. 🚖 🖷 🖩 🖻	🗙 💽 📲 💽	1			
<single cost=""></single>		r 🗐 🖨 🖨 🕞	43			
<all></all>						
<single cost=""></single>						
6: Profile Finish <others></others>		Description	Туре	Costhead	Cost	Unit Desc.
8						
+ Catalog: <	Main>					
Catalog: Fit	tings Data					
1600 Wht	Lck LH	Cockspur Locking	Unit	8: Fitting Supplier 1	10.00	Each
1601 Gld L	ck LH	Cockspur Locking	Unit	8: Fitting Supplier 1	20.00	Each
1605 Wht	Lck RH	Cockspur Locking	Unit	9: Fitting Supplier2	10.00	Each
1606 Gld L	ck RH	Cockspur Locking	Unit	9: Fitting Supplier2	20.00	Each
		Cockspur Non-Lock	Unit	8: Fitting Supplier 1	8.75	Each
1610 Wht	Non LH	COCKSpur Norr-Lock	Onite	arriver a subburner a		



The Product Setup form now shows a new 'Unit Desc.'column. It displays the unit of measure of the Product cost.

Set-up - Support for negative values for size type Options in matrices

The program now allows inputting negative value for size type option when used in:

- Cells of a Part Matrix
- Row or column indices of a Part/Cost/Price Matrix
- Condition of a rule

Currently, it requires multiple rules to be written to apply a negative adjustment that varies depending on conditions. Now, these multiple rules can be converted into a single rule by deriving the negative adjustment from a part matrix.

E.g. A negative adjustment can be required to shorten length of the profile calculated (say of frame extension depending on the cill/threshold profile used as shown in the figure given below):

			Part Matrix			^
Cells Format Code Costhead Cell Type	31: Size	v	Current Cell Option FrameExtLenAdj Use Part No. for Selection	33 : FrameExtLenAdj 0	 	
Cill <none> 95mm 150mm 180mm</none>	33 / 0 33 / -10 33 / -20 33 / -30					
	Sance!"				_ <u>I</u> mpo	rt

System - Rules

It is now possible to specify the vertical offset, to position the image of a part on the window/door graphics, using a size type Option also. This could be useful in cases where the vertical offset is variable rather than fixed.

E.g. Positioning image of a letterbox, knocker etc. where its position changes according to the door slab design.

	System SY01 : Rule 10	×
Rule Type Description	1 : Part Level 2 : Frame	
Use Visibility	1 : ESR1 [++] Operation Position	
 ✓ Inside ✓ Outside ✓ Datum ✓ Position 	Section C 0.0 Rotation 0 Flip	-
 Quantity Spacing 	1 0 0 229: Cill Horns	



Sales Header Codes

The Sales Header Codes are modified to reflect the following:

Sales Header Code	Migrated to DB in this	Database Table	Maxim Recor	num d Limit	Remarks
	Release		Old	New	
Source	~	WMSource	20	99	Description character limit increased to 20.
Status	\checkmark	WMStatus	99	99	Description character limit increased to 20.
Tax	\checkmark	WMTax	20	99	
Order Type	-	WMOrderType	999	999	-
Area	-	WMArea	9999	9999	
Payment Term	-	WMPaymentTerm	50	99	
Route	-	WMRoute	100	100	

All Sales Header codes stored in database can now be set-up using the grid based Set-up forms.

SUPERVISOR (0001) -	Windowmaker - Windowmaker 2012 Express -
Sales	Routes ×
🕨 🦥 Customers	<u>File Edit View Tools Help</u>
🕨 🛃 Sales Quotes	
Bales Orders	i 'ia 🕰 🚔 🆷 📉 🗗 🏥 😁 💽 😭 🤣
🕨 📄 Return Orders	
Reports	Site Δ
🚽 💑 Set-up	ID Description
🔒 Order Types	9
🔒 Areas	
🔒 Sources	Site: Home I Monday Route
🕂 Currencies	2 Tuesday Route
- Statuses	
Taxes	3 Wednesday Route
Payment Terms	4 Thursday Route
Routes	5 Friday Route
Headers	Site: Oakville
Footers	6 Monday Route
Customer Documents (WRP)	7 Wednesday Route
	8 Friday Route
	_ Site: Pineville
	9 Tuesday Route
Sales	10 Thursday Route
	_ Site: Wilowdale
	11 Monday Row
	124
Enchuring	

Application Settings

The Application Settings are now re-organised department-wise to make the user interface more intuitive.

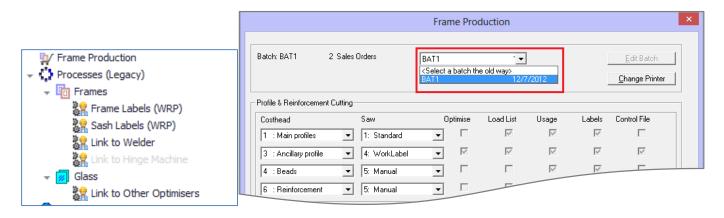
Administration Application Settings X Subsers Settings Sales Header Invoice Numbering Invoice Numbering	SUPERVISOR (00	001) - Windowmaker -	Windowmaker 2012	Express – 🗆 🗙
Nation	 Users Settings My Details Preferences Settings 	Sales Sales Header Sales Line Manufacturing Settings Administration	Invoice Numbering Sequential Next Invoice No. Despatch Numbering Sequential	© Use Sales Order No.



Frame Production

The program now allows running Frame Production and all legacy production processes on a Production Batch, apart from the 'old way' batch. Previously only users with scheduling options were allowed to do so. (An 'old way' batch is one created using the 'Edit Batch' button).

Note: The 'old way' batch will be discontinued in a forthcoming release (expected release Q1 2013). It is recommended that users switch to using the Production Batch.



Legacy Management Reports Rendered Obsolete

Legacy Management Reports are now obsolete.

Instead, generate management reports now using one or more of the following approaches:

- Switch to using one of the standard Windowmaker reports e.g. 'WM_New Orders by Period'.
- ▲ Export/Print the contents of the grid on the Sales Header setup form, after customising it to show/hide required fields and grouping/filtering/sorting as appropriate.
- ▲ Create custom View(s) in WMDATA database with required data. Views with names conforming to the naming convention get listed under the Reports node in the respective department. Selecting such a report node will display the View data in a grid. Export/Print the contents of the grid, after customising it to show/hide required fields and grouping/filtering/sorting as appropriate.
- Create custom Crystal Report(s) with name conforming to the naming convention. These get listed under the Reports node in the respective department. Run the report to generate the desired Management Report.
- ▲ Use any of the above approaches to export relevant data to Microsoft Excel. Use tools within Excel (e.g. Pivot table, chart) to generate management reports.
- ▲ Import data from WMDATA SQL Server database into Microsoft Excel file, from one or more relevant tables, and use tools within Excel (e.g. Pivot table, chart) to generate management reports.

If you are using any standard or custom legacy Management Reports for which you have problems replacing using any of the above approaches please contact your Windowmaker supplier or write to <u>Help@windowmaker.com</u>.

Enhancements to Options

Bays, Bows

Surveyed from 'Outside Width, Inside Projection'

A new surveyed from choice viz. 'Outside Width, Inside Projection' is available. This allows bays/bows to be configured by recording the Width and Projection(s) as surveyed from outside and inside respectively.

Default Bay/Bow Plan Dimensions Settings

The program now allows specifying the default bay/bow plan dimensions settings. A new bay/bow Sales Line will be created with these defaults. This makes configuring Sales Line for bays/bows easier and quicker by setting the defaults to most frequently used values.



The 'Surveyed from' Application Settings also apply when creating a Conservatory.

American Bays

The new surveyed from choice and the default plan dimension settings have made configuring American Bays easier and quicker.

Refer 'How to configure an American Bay' topic in the Windowmaker help file.

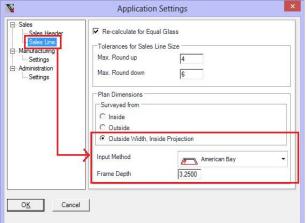


Figure 1

The figure below highlights the default selections on the Situation page when configuring a bay with the application settings as shown in above figure.

Options Toolbox	,	
× 5	III 🛞 📅 🚺 👐	
Ref. Location Lounge	▼ Qty. 4 2000 w x 48.0000 h	
Shapes		
	24.0000	
	3,2500 T	1
	16.0313	
	13500	
004	Plan Dimensions	
	Surveyed from	
No. Facets 3	C Dutside Width, Inside Projection	
Close		
	American Bay	
Installation Note	Viewed from Outside	
Situation/Solution/		
OE Cancel		

Figure 2

Bays, Bows/Customer Documents

The plan graphics for Bay/Bow Sales Lines are now output on the following customer documents:

- Quotation
- Order Acknowledgment
- Survey Sheet



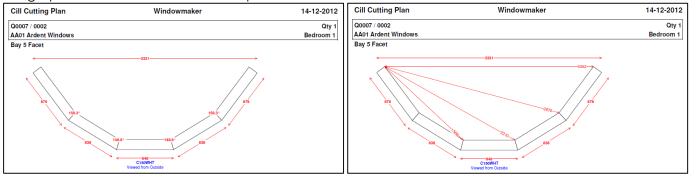
Quote No.	Date	Cust	omer Re	ef.	Re	sponsible	<u>þ</u>
Q0023	20/12/2012					Chris	
Sales Line	Details	\$	Qty	Options			
0001 	3000w	Facet x 2100h	1	PVC Colour Outer Frame Door Z-Sash Handle Colour Door Lock Type Door Handle Cill 4-20-4 Clear	White 72mm 112mn White Standa Levr/Lu 95mm	n ard ever	
				Total Standard	20.00 %	£	383.58 76.72
				Standard Grand Total	20.00 %	£	460.30

By default, the standard customer documents will include the plan graphics. Unselect the 'Include Sales Line Plan' setting to suppress it, if required.

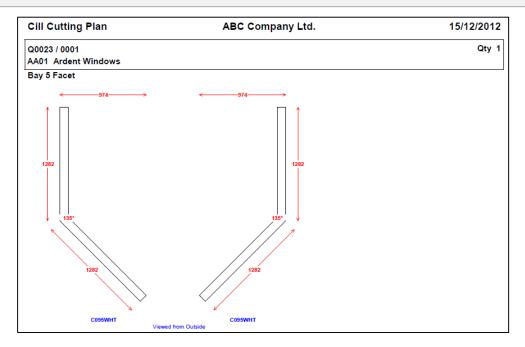
		Set	ttings	
Stationery	Plain 💌	Page Header	Print on first page	
Top Margin	1	🔲 Window envelope		
Logo Size	No Logo 🔍	Logo Position	Top Right 💌	
Logo Image				
Include Customer	reference	Include U-value		< → 3001 (1) →
🔲 Include Zero-value	e Extras	🔲 Print Thousands Sep	arator	
Format	Quote Pricing 🗨			
Detail Sequence	Graphics, Text 💌	Detail font size	10 💌	
Sales Line Graphics	<default> 💌</default>	Include Dimensions	Internal	
🔽 Include Sales Line	e Plan	Include Plan Dimensions		
Print Options		🔲 Output only non-defa	<mark>≺Default></mark> ^u Projections Angles	
🔲 Print each Sales L	ine on new page		Projections + Angles String Dimensions - Right	1243
<u>O</u> K Cance	el <u>S</u> ave as Default		String Dimensions - Left	
				< <u>←</u> 1243 → [™]

Bay and Cill Plan Graphics

The Bay and Cill plan graphics, displayed on CrystalReports using WMSalesLinePlan and WMSalesLineCillPlan respectively, now show dimensions with constant font size independent of the size of the graphics. This makes the graphics look neater and more impressive.







Windowmaker boost for Logikal users

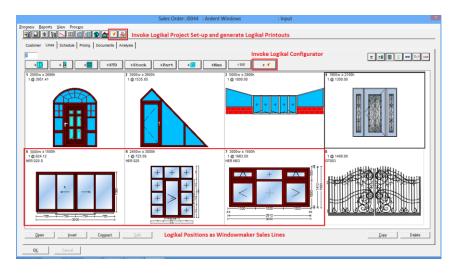
It is now possible to:

- Add Logikal Positions to a Windowmaker Sales Quote/Order, using the Logikal configurator
- Generate Quotation for a Windowmaker Sales Quote containing a mix of Windowmaker Sales Lines and Logikal Positions
- Add a Sales Order containing Logikal Positions in a Production Batch
- Generate Logikal Printouts on a Windowmaker Sales Order or a Production Batch containing Logikal Positions
- Specify Logikal set-up and preferences
- Specify Project specific set-up and preferences for a Windowmaker Sales Quote/Order

Are you using both Windowmaker and Logikal? If yes, then you can now use these as a single integrated system. The unified system allows you to analyse combined sales using Windowmaker.

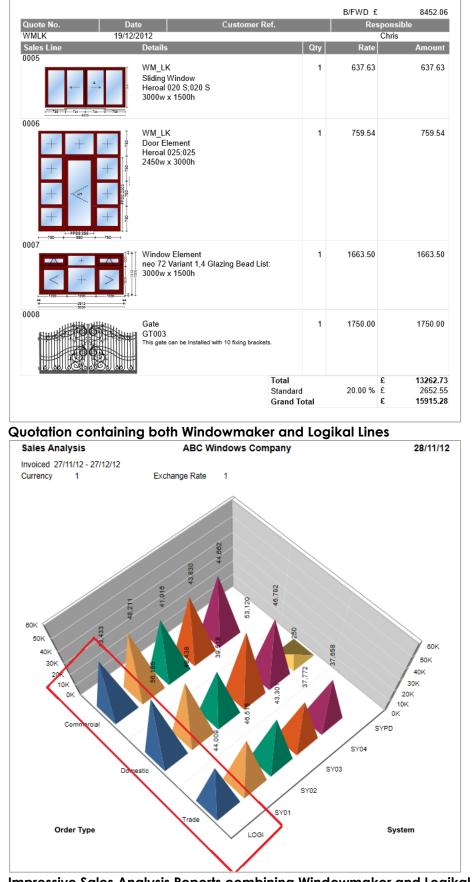
Are you using only Logikal? Look forward for the future releases of Windowmaker which will allow much more than what you can currently do with Logikal, e.g.

- Scheduling
- Stock Control
- Tracking work in progress
- Integrating with Microsoft Dynamics NAV and AX; or other ERP systems
- Better reporting
- Synchronising Sales Quotes/Orders including Logikal Lines with Sales Clients





A Sales Order with combined Windowmaker and Logikal Lines



Impressive Sales Analysis Reports combining Windowmaker and Logikal Lines



Bar Optimisation II/III

32-bit bar optimisation now supports profile pairing, with all the pairing modes that the 16-bit bar optimisation supports.

Refer topic 'Effects of using 32-bit Bar Optimisation' in the Windowmaker help file.

Note: The 16-bit Bar Optimisation will be discontinued in a forthcoming release (expected release Q1 2013). It is recommended that users switch to using the 32-bit variant. If there are any concerns or issues with using the 32-bit Bar Optimisation please contact your Windowmaker supplier or write to <u>Help@windowmaker.com</u>.

Link to Glass Optimiser

Link to Perfect Cut Glass Optimiser now

- Outputs glass sizes with 4 decimal places when using Imperial data
- ▲ Supports 1/16" rounding, if set on Application Settings.

Enhancement to Windowmaker ERP (NAV)

Upgrade to Dynamics NAV 2009 R2

The Windowmaker ERP-NAV add-on is upgraded to support Microsoft Dynamics NAV 2009 R2 from NAV 2009 SP1. You must upgrade your Dynamics NAV to 2009 R2 when you upgrade to this release of Windowmaker. Note that the upgrade from NAV 2009 SP1 to R2 is simply a solution upgrade and not a full upgrade. A solution upgrade is compatible with data, databases, objects, and web services that are already implemented in Microsoft Dynamics NAV 2009 SP1. For details refer http://msdn.microsoft.com/en-us/library/gg502497.aspx.



Windowmaker 2012 R1

General Enhancements

Customer Documents (Quotation, Order Acknowledgement, Invoice)

Multi-page documents now include carried forward (C/FWD) and brought forward (B/FWD) values. Pricing Extras subtotal lines are now suppressed when they would only be totalling a single line.

Requirements Summary

The Requirements Summary report now offers a choice of 'Viewed from side'. This is particularly useful when the report is used as a replacement for the old 'Glass Usage' report.

Longer Customer Reference

The 'Customer Reference' field on the Sales Header has increased from 15 to 25 characters.

Higher Sales Values

The program now supports Sales Quote/Order values of up to 12 digits (including decimal places). However, there is no change to Sales Line value limits.

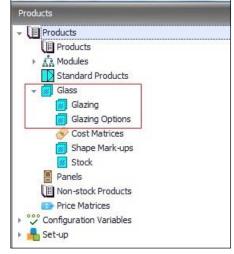
Parts

If modules have been migrated to the database, a new 'Save' button is available on the Part Dialog. This allows extracting the Part Graphics to a specified directory. You can edit the graphics file using a relevant application. You need to reselect the file from the Part Dialog to replace the graphics associated with the part.

Glazing

If modules have been migrated to the database, the set-up of glazing is separated into two different menu entries 'Glazing' and 'Glazing Options'. 'Glazing' shows records for Sealed Units, Single Glazing and Unglazed. 'Glazing Options' shows records for Grids, Leaded Patterns and Processes. **Each** menu entry allows 999 records.

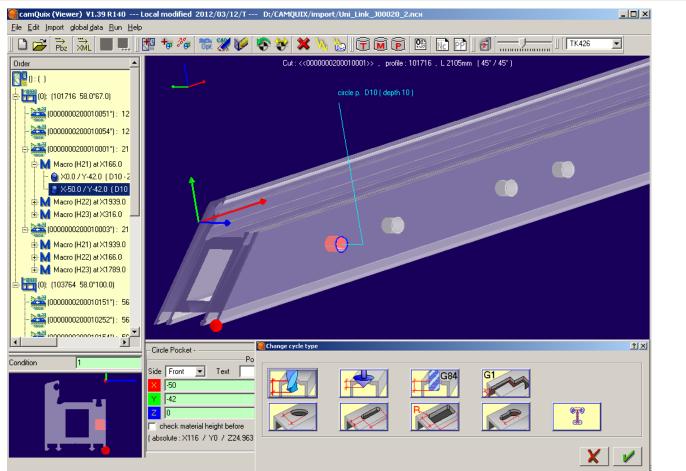
See 'How to know whether module data is migrated to database or not' topic in the Help file.



View Machining Details

A 'View Machining' button is now available, on the Sales Line – Solution page, if the free CamQuix Machining Viewer is installed. Pressing the button allows the user to navigate the profiles and operations for the Sales Line in order to preview these in 3D. This allows checking of operation positions without having to create test production batches. Only those operations that are positioned via Windowmaker rules can be previewed.





Enhancements to Options

Bar Optimisation II/III

The 'Bar Optimisation II' option now includes the 'Simple Profile Pairing' facility.

The 'Bar Optimisation III' option now includes the following facilities:

- ▲ Sophisticated Profile Pairing
- Multiple bar length optimisation
- Variable bar length optimisation

Earlier these facilities were available under separate options.

Commercial Contracts

It is now possible to

Split' quantity of a Sales Line in a Phase into another Sales Line. When split, the program inserts a new Sales Line into the Phase with a specified quantity. The quantity of the Sales Line that is split is reduced accordingly.

Refer Help topic How to Split the Quantity of a Sales Linefor details.

- Retain the link with the corresponding parent Sales Line in the Master Order, when modifying a Sales Line in a Phase. If required, there is a provision to break the link manually.
- Create Sales Lines with quantity up to 9999 (instead of 999), in a Phased Quote/Order. However, the Phases created from these can only have Sales Line quantity up to 999, as currently.
- Create a Phased Quote. This allows creating and quoting for Sales Lines with large quantities and high price.



Create a Phased Order directly, rather than flag it as one by splitting it into Phases or converting a Sales Quote to a Phased Order.

XML Electronic Glass Order

It is now possible to generate a glass Purchase Order in 'XML (XSD)' format specifying glass shape codes and parameters according to the Lisec Shape Catalogue. For this, specify 'Lisec' as the Shape Authority on a Glazing Supplier.

Enhancements to Windowmaker ERP (NAV)

Synchronise Sales Quotes

It is now possible to restrict synchronisation of Sales Quotes between Windowmaker with Dynamics NAV. In this scenario, quotes would be managed entirely within Windowmaker.

Separate Sales Line for Installation

It is now possible to split the Installation aspect (i.e. BOM and Labour) of a Windowmaker Sales Line into a separate Sales Line in NAV. This allows despatch and consumption of Installation material at a different site/branch/depot than the production site.



Windowmaker 2012

Pre-requisites for upgrading

You may opt for upgrades depending upon the versions you have installed. For your understanding we have divided them in two different cases.

Case 1: You are currently using a version between Windowmaker v5.950 and v5.961 (both inclusive).

In this case, you can upgrade to Windowmaker 2012 directly. Simply follow the two steps as given here:

- 1. Refer <u>Windowmaker 2012 Release Notes</u> and <u>Windowmaker 2012 Upgrade Guide</u> for instructions on how to upgrade your existing product to Windowmaker 2012.
- 2. Refer<u>Windowmaker 2012 Installation Guide</u>forinstructions on downloading and installing Windowmaker 2012.

Case 2: You are currently using a version lower than Windowmaker 5.950.

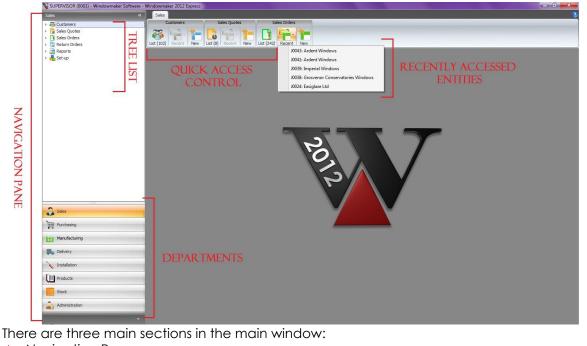
In this case, upgrading to Windowmaker 2012 is a two-step process:

- 1. Upgrade from your current version to Windowmaker 5.961.
- ▲ Refer <u>Windowmaker 5.9 Upgrade Advisor</u> for instructions on how to upgrade your existing product to Windowmaker 5.961.
- Refer <u>SQL Installation Guide</u> for instructions on downloading and installing SQL Server 2008 R2 Express Edition.
- Refer <u>Windowmaker 5.9 Installation Guide</u> for instructions on downloading and installing Windowmaker 5.961.
- 2. Upgrade from Windowmaker 5.961 to Windowmaker 2012
- ▲ Refer <u>Case 1</u> above

General Enhancements

The Windowmaker 2012 Main Window

Windowmaker 2012 comes with an extensively redesigned main screen. While the new look and feel of the main screen is refreshing and state-of-the-art it will also appear familiar to Microsoft users.



- Navigation Pane
- A Quick Access Control



Form Area

1. Navigation Pane

In Windowmaker 2012, the traditional menu bar is replaced with a 'Navigation Pane' located on the left of the main screen.

The Navigation Pane consists of several Groups – displayed as tabs. Each Group corresponds to a department or functional area in a typical window/door manufacturing company. These are:

- Sales
- Purchasing
- Manufacturing
- Delivery
- Installation
- Products
- Stock
- Administration

A **TreeList** is associated with each department. For a particular department the main entities, relevant features, activities and reports are listed as **Nodes** or **Sub-Nodes** within the tree list. The availability of the nodes depends on the product, licensed options and the rights of the user logged in. Click on a parent node to toggle between expanding and collapsing the node. This shows/hides the children nodes.

Click on a child node to access the relevant feature or functionality.

Select a particular department to show the corresponding tree list.

2. Quick Access Control

Windowmaker 2012 now has Quick Access Control on the top right corner of the main screen.

Sales					
Customers	Sales Quotes	Sal	es Orders	'S	
🍣 🚰 🏪	🔓 📪 🏪		-	1	
List (92) Recent New	List (5) Recent New	List (211)	Recent	New	_
			50	00553: Choice Windows _Conservatories	
			50	00552: A B Company Ltd	
			J0	0019: MBS Window Systems	
			M	IIXCOL: Ardent Windows	
			PL	LABEL: Ardent Windows	

The Quick Access Control tab allows the user to quickly access frequently required functions with one click of a button. Features displayed on the Quick Access Control correspond with the department selected in the navigation pane.

For the most important entities (viz. Sales Quotes/Orders, Customers, Production Batches, Deliveries), the recently accessed ones can be easily opened for reference/viewing. The program remembers up to 10 recently accessed entities of each type.

Pro	lucts	
- U	Products	
1	Products	
j.	A Modules	
	Standard Products	
3	Glass	
	Panels	
	Non-stock Products	
	Drice Matrices	
+ 00	Configuration Variables	
	°Coptions	
	😍 Designs	
	° Pane Types	
	° Features	
	" Design Classes	
	V Design Classes	
-	Set-up	
*		
~	Set-up Costheads	
-	Set-up Costheads	
Ē	Set-up Costheads	
ار آ	Set-up Costheads Sales Purchasing	
ار آ	Seles Purchasing Manufacturing	
	Set-up Costheads	
	Set-up Costheads	



3. Form Area

This is the area where most of the user interface is displayed. This ensures that the Navigation Pane and the Quick Access Control are visible most of the times.

Benefits of the new main window user interface:

- Aesthetically Pleasing
- Intuitive and user friendly
- ▲ Familiar for users of Microsoft Outlook, Microsoft Office and Microsoft Dynamics (e.g. CRM, Nav, ax) products, and hence easy to adapt
- Reduced learning curve for new users

Non-Modal Behaviour of the 1st Level Forms

Any form opened from the Windowmaker main window by selecting Nodes of the Tree List or using the Quick Access Control is a 1st level form.

In Windowmaker 2012, the 1st level forms are made non-modal. This means that you can still interact with the Windowmaker main window (i.e. Navigation Pane and Quick Access Control) while a 1st level form is open. The navigation becomes smooth and efficient as it allows the user to open another 1st level form without the need to close the previous opened one.

Keyboard Navigation

In Windowmaker 2012, utmost care has been taken to make sure that navigation using keyboard is smooth and efficient. It is possible to navigate within the Navigation Pane and Quick Access Control using keyboard, as well as toggle control between Navigation Pane, Quick Access Control and 1st level form.

Windowmaker 2012 Help About button

The Help About is revamped.

Windowmaker Help Get help using Windowmaker		Windowmaker 2012 Express			
What's New The latest on the Windowmaker front	About Windowmaker 2012				
J	Version	6.0.2.0			
	User Licence No.	WSLDEM /177			
Contact Us See Contact Details	This software is subject to the Windowmaker End User Licence Agreement.				
,	© 1998-2012 Windowmaker Software Private Ltd. All rights reserved. © 1983-1998 Windowmaker Software Ltd. All rights reserved.				
Get Support Let us know if you need help or how can we make our product better					

Windowmaker.exe

The Windowmaker program executable is now renamed to 'Windowmaker.exe'.

Product Version

Windowmaker product versioning convention is now changed on the lines of more popular and globally preferred convention. The product versions will now follow the 'Major.Minor.Flag.Revision' convention. The product version will be displayed on the splash screen displayed at the product start-up or in the Help About form. Refer Help file for details.



Renamed Windowmaker entities

In Windowmaker 2012 the following key entities are renamed:

Old Term	New Term
Job	Sales Order
Quote	Sales Quote
	Sales Header - denotes both Sales
	Quote and Sales Order
Credit Job	Return Order
Item	Sales Line
Job Type	Order Type
Master Job	Phased Order

Wherever these terms are displayed, output and stored the program will use the new terms. This has resulted in changes in the database schema, user interface, standard crystal report design & outputs, native Windowmaker report outputs, Windowmaker COM component and help file for all the products.

Important Note: Please refer to the <u>Windowmaker 2012 Upgrade Guide</u> for more details on each of the above and any pre-requisites or repercussions' of upgrading to Windowmaker 2012.

Set-up Forms

Auto Filter Row

All grid based set-up forms now have the Auto Filter Row. Use this to filter the contents of the grid easily and quickly.

The Auto-Filter row is displayed above all other rows and allows quickly filtering data by entering the filter values within its cells.



								Export To • As • Preview
								PDF File
								HTML File
								MHT File Single File Web Page
								RTF File Rich Text Format
								XLS File Microsoft Excel 2000-2003 Workbook
								XLSX File Microsoft Excel 2007 Workbook
								CSV File
								Text File
								Image File BMP, GIF, JPEG, PNG, TIFF, EMF, WMF
	Sales Orde	rs (Live)						
[]	<u>File E</u> dit	<u>V</u> iew <u>P</u> r	ogress <u>R</u> eports <u>T</u> ools <u>H</u> elp					
Ŧ	12 🞑 🚳	🖷 🖻 🗙	🛛 🔹 👘 Sales Orders (Live) 👻		🖋 4 : Acknowl'd	• 😭	Ø	
1	Customer D)ocuments (WRP) 👻 Recalculate Global Cha	nges Export	Link To Sales			
1	📄 Docume	ents 📑 Ot	her					
D)rag a column l	header here t	o group by that column					
Γ	Order ∇	Account	Name 🛛	Cust. Ref.	Order Value	Status	Comment	
9			*windows					
_	GRID-CUT	AA01	Ardent Windows			Production	To Demo Grid Template Report	
-	J0039 J0038	IM01 GR01	Imperial Windows Grosvenor Conservatories Windows &		4721.78 33532.39		Demo Job for grid Bays And Bows	
-	J0022	DO01	Door & Windows Systems Ltd		926.90		To demo door Panels	
	J0020	AB06	Absurdly Priced Windows		2257.00	Input	To demo Spacer thickness change	
	J0018	AA01	Ardent Windows		34960.00	Production	To demo auto use of Production line	

Print and Preview

All grid based set-up forms now have the ability to print the contents of data grid.

This can prove to be a very handy tool to develop simple list type reports. Layout the grid contents as required by filtering, grouping, sorting the contents of the grid to have the desired contents for a report and then print it.

It is also possible to preview the 'report' (i.e. printout) before actually printing it using the Preview form.

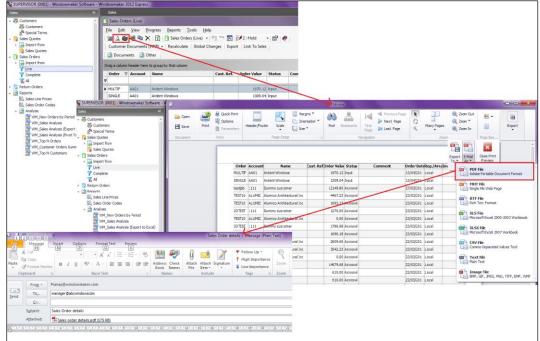
On the Preview form, it is possible to:

- Specify the page set-up (viz. margins, orientation, paper size and scale)
- Specify the header/footer text, watermark image to be included in the printout
- Specify print options (e.g. whether to print horizontal and vertical grid lines; print group footer etc.)
- Navigate through the pages



Search through the contents

From the Preview Form it is also possible to export the report or e-mail the report as an attachment in one of the formats as seen in the screenshots.



Find Panel

All grid based set-up forms can optionally display the built-in Find Panel. This is a powerful tool to search the records containing the specified keyword(s) quickly and easily. The tool searches for the specified keywords in the entire grid and across the visible columns. It highlights the entries that match the search criteria. The search function is dynamic and updates the grid contents with every key entry.

Ľ	Sales Orde	ers (Live)						
<u> </u>	Eile <u>E</u> dit a 🔍 📽 Customer Docum	Documents ((WRP) - Recalculate G		Export	Link To Sales		
D	× su +inp		to group by that column	1	▼ Find	d Close		
	Order ⊽	Account	Name	Order Value	Status	Comment		
Q								
	30020	AB06	Ab <mark>su</mark> rdly Priced Windows	2257.00	Input	To demo Spacer thickness change		
ľ			Ab <mark>su</mark> rdly Priced Windows Ardent Windows	2257.00 4459.30		To demo Spacer thickness change Job to Demo <mark>SU</mark> NBURST & T-Georgian		
	30020	AB06			Input			
) 	J0020 SBURST	AB06 AA01	Ardent Windows	4459.30	Input Input	Job to Demo <mark>SU</mark> NBURST & T-Georgian		
	30020 SBURST 500534	AB06 AA01 AB02	Ardent Windows A B C Glazing	4459.30 4496.35	Input Input Input	Job to Demo <mark>SU</mark> NBURST & T-Georgian Job with Glass from two <mark>su</mark> ppliers		
	J0020 SBURST 500534 500519	AB06 AA01 AB02 AA02	Ardent Windows A B C Glazing AA In <mark>su</mark> lations Ltd	4459.30 4496.35 2679.95	Input Input Input Input	Job to Demo <mark>SU</mark> NBURST & T-Georgian Job with Glass from two <mark>Su</mark> ppliers Alignment of Mech.T/M Rake Node		
	30020 SBURST 500534 500519 300325	AB06 AA01 AB02 AA02 SU03	Ardent Windows A B C Glazing AA In <mark>su</mark> lations Ltd Sunview Windows	4459.30 4496.35 2679.95 6987.74	Input Input Input Input Input	Job to Demo <mark>SU</mark> NBURST & T-Georgian Job with Glass from two <mark>su</mark> ppliers Alignment of Mech.T/M Rake Node Job Scheduled, Status < Ord OK		
	30020 SBURST 500534 500519 300325 300319	AB06 AA01 AB02 AA02 SU03 SU03	Ardent Windows A B C Glazing AA Insulations Ltd Sunview Windows Sunview Windows	4459.30 4496.35 2679.95 6987.74 6340.20	Input Input Input Input Input Input	Job to Demo <mark>SU</mark> NBURST & T-Georgian Job with Glass from two <mark>su</mark> ppliers Alignment of Mech.T/M Rake Node Job Scheduled, Status < Ord OK Job Scheduled, Status < Ord OK		

Refer 'How to Use Find Panel' in the Help file for details.



Sales Quote / Order Set-up form

Apart from the common changes to set-up forms as described above, there are some specific changes to the Sales Quote/Order Set-up form.

Sales Quote/Order 'Processes'

In **Windowmaker 5**, the following 'processes' could be run on a 'batch' of Sales Quotes/Orders from the 'Process' menu on the main window:

- Job Recalculation
- Global Changes
- Customer Documents (WRP)
- Link to Sales
- Export

In **Windowmaker 2012**, it is possible to run these directly from the Sales Quote/Order set-up form, subject to availability of the relevant options. It does not require one to create a batch to be able to run these processes. Instead, select the required Sales Quotes/Orders from the list and run the processes directly on the selection. The selection can be continuous or discontinuous. The ability to sort and/or filter the grid contents makes it easier to select the required Quotes/Orders. The new tasks are:

- ✓ More user-friendly and
- ✓ Efficient.

Ľ	Sales C	rde	rs (Live)					
E	ile <u>E</u> d	lit	<u>V</u> iew <u>P</u> ro	ogress <u>R</u> eports <u>T</u> ools <u>H</u> elp				
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	Custom	er D	ocuments (V	VRP) 👻 Recalculate 🛛 Global Char	nges Export	Link To Sales		
	🗊 Doci	ıme	ents 词 Ot	her				
D	rag a colu	ımn		o group by that column				
ŀ	Order							
Ÿ								
	J0024		EA01	Easiglaze Ltd		1155.20	Input	
	J0023 AI01		J0023 AI01 Airlock Double Glazing		23		Input	
	J0022		DO01	Door & Windows Systems Ltd		926.90	Input	
	J0021		HB01	HB Joinery Manufacturers		4275.00	Input	
	30020		AB06	Absurdly Priced Windows		2257.00	Input	
	J0019		MB01	MBS Window Systems		3303.18	Input	
	J0018		AA01	Ardent Windows		34960.00	Production	
	J0017		AAA001	Famous Glass - Branch 1		95.00	Input	

Sales Quote / Order Crystal Reports

Like Windowmaker 5, it is possible to run crystal reports from the Sales Quote/Order Set-up form on the selected Quotes/Orders. However, the reports are grouped into categories for easier access. It is possible to specify a category for each custom report by changing the report (.RPT) file name according to the convention.

See Help file for details of RPT file naming convention.



📑 Sa	les Orde	ers (Live)				
<u>F</u> ile	<u>E</u> dit	<u>V</u> iew	<u>P</u> rogress	<u>R</u> eports	<u>T</u> ools	<u>H</u> elp
1 *	🔔 🚭	📸 🗈	X 🕑	📑 Sales O	rders (Liv	e) • ⊕≣ □=
Cu	stomer D	ocumen	ts (WRP) 👻	Recalcula	te Gloł	bal Changes
	Docume	ents 🔓	Other			
C	<u>1</u> WM	Order A	cknowledg	ement		
	<u>2</u> WM	_Photo F	ront			Cust
6	<u>3</u> WM	_Photo F	ront (Lands	cape)		Cust
H	<u>4</u> WM	_Purcha	se Order			
-	<u>5</u> WM	_Roof O	rder Form			
-	<u>6</u> WM	_Survey	Sheet		ems Ltd	
-	<u>7</u> WM	_Wallcha	art		rers	
	<u>8</u> WM	_Invoice			ws	
300)19	MB01	MBS Wi	ndow System	ns	

Views

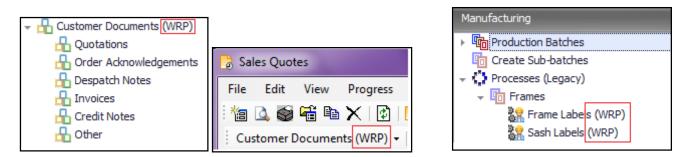
You can create Views in Windowmaker database, which will be listed under 'Reports' in the relevant Department. For this, the View name must conform to a particular naming convention. The View will be displayed in a grid, which means all the standard features viz. grouping, sorting, filtering, searching, printing and exporting can be applied on the data displayed in the grid.

ales	« Sales						
7 Customers	Sales Order Codes	5					
ᡖ Sales Quotes	<u>Eile E</u> dit <u>V</u> iew	Tools Help					
📋 Sales Orders		•					
Return Orders							
Reports	Customer No 🛆						
Sales Order Codes	Sales Order No	Туре	Status	∆ Source	Paymer	nt Term	
Analysis	Customer No: AB		Julia	<u> Jource</u>			
 Marketing 	+ Customer No: AB						
Set-up	- Customer No: AB						
- Soc op	500520	Domestic	Input	Repeat bus	CWO	(Cash Payment with Order)	
	- Customer No: AB					<u></u>	
	30020	Domestic	Input	Repeat bus	CWO	(Cash Payment with Order)	
	- Customer No: AB				1	(,	
	500521	Domestic	Input	Repeat bus	CWO	(Cash Payment with Order)	-
	SCH10	Domestic	Input	Repeat bus	CWO	(Cash Payment with Order)	
	- Customer No: AB		in post			(,	
	300350	Domestic	Acknowl'd	Repeat bus	CWO	(Cash Payment with Order)	
	- Customer No: AC		Heldiomid	Repose bas	0.00	(cashi ayinone men oraciy	
	000017	Domestic	Invoiced	Repeat bus	CWO	(Cash Payment with Order)	
	- Customer No: AI		Invoiced	Repeaced		(cashi ayinche with order)	
Sales	J0023	Domestic	Input	Repeat bus	CWO	(Cash Payment with Order)	
▲ Sucs	+ Customer No: BC		Inpoc	Repeat bus		(Cash Payment with Order)	
Purchasing							
	Customer No: BU 500526		Bead Meas.	Depert hus	GW0	(Cash Daumant with Order)	_
4 Manufacturing		Domestic		Repeat bus	CWO	(Cash Payment with Order)	
Manufacturing	500531	Domestic	Input	Repeat bus	CWO	(Cash Payment with Order)	
Delivery	Customer No: CA		Territ	A sharesh	20 D.	(20 David Cardinan Order)	
belivery	500532	Domestic	Input	Advert	· ·	(30 Days Credit on Order)	
where there	500533	Domestic	Input	Advert	30 Days	(30 Days Credit on Order)	
V Installation	Customer No: CH						
a	SCHD1	Trade	Acknowl'd	Repeat bus	CWO	Customization	
Products	SCHD6	Trade	Acknowl'd	Repeat bus	CWO	(Area	
	100104	Trade	Despatched	Repeat bus	CWO	(Delivery	
Stock	100117	Trade	Despatched	Repeat bus	CWO	(
	100125	Trade	Despatched	Repeat bus	CWO	(
Administration	300301	Trade	Input	Repeat bus	CWO	(
	300313	Trade	Input	Repeat bus	CWO	(
	× 300323	Trade	Input	Repeat bus	CWO	(



This proves to be a very handy tool to develop simple list type reports, seamlessly integrated and accessible from within Windowmaker. Views can be created in the Windowmaker SQL database using the SQL Server Management Studio with very basic knowledge of the database system. This way the dependency on a reporting tool such as Crystal Reports and expertise thereof can be avoided for simple reports.

The modified grid layout can be stored so that you can generate the desired report on a single click every time.



The Windowmaker Native Reports are documents/reports that are designed using Windowmaker. These are Customer Documents (viz. Quotations, Order Acknowledgements, Invoices, Credit Notes, and Despatch Notes), Delivery Notes, Frame Purchase Order and Frame/Sash Labels. These are denoted with "(WRP)" wherever they appear in the application.

This is done to distinguish these clearly from the corresponding Crystal Report equivalents. The corresponding '.DAT' files, storing the report design details, are renamed to have '.WRP' extension in the data folder.

Stock Set-up / Non-stock Products Set-up

The Stock (and Non-Stock) Set-up form is redone to use the grid for a consistent, easy to use and efficient interface. This means all the standard features viz. grouping, sorting, filtering, searching, printing and exporting can be applied on the data displayed in the grid.



Stock «		Stock									
🧱 Stock	N	Stock R	ecords								
📒 Re-order	E	ile <u>E</u> d	it <u>V</u> i	ew <u>R</u> eports <u>T</u> oo	ls Heln						
1 Transactions		_		-							
Reports				🖻 🗙 🗗 📲 '	-	r 🥙					
WM_Outstanding Stock Purchase Orders WM_Re-Order Report		📄 Repo	rts								
WM_Re-Order Report											
WM_Stock Issue Report	•	ite ∆									
WM_Stock Movement		Stock N	o. 🛆	Description	Supplier	Name	Costhead	Ту	pe	Unit Desc.	Lead Time
WM_Stock Nett Issue History	₽										
WM_Stock Valuation		+ Site:	Home								
WM_Theoretical Stock		- Site:	Oakville	2							
🔒 Set-up	Þ	BKS0	1	BKS01-Loc 2	NSUP1	A & B Accessories Ltd.	Main profiles	Uni	t	Each	1
		BKS0	2	BKS02 - Loc 2	NSUP1	A & B Accessories Ltd.	Main profiles	Uni	:	Each	1
A		PC00	01	Standard Prod Loc 2	ZZ02	Internal Supplier 2	Standard Products	Uni	:	Each	0
Sales		PC00	02	Standard Prod Loc 2	ZZ02	Internal Supplier 2	Standard Products	Uni	t	Each	0
		PC00	03	Standard Prod Loc 2	ZZ02	Internal Supplier 2	Standard Products	Uni	1	Each	0
Purchasing		- Site:	Pineville	2							
Manufacturing		BKS0	1	BKS01-Loc 3	NSUP1	A & B Accessories Ltd.	Main profiles	Uni	:	Each	1
		BKS0	2	BKS02 Loc 3	NSUP1	A & B Accessories Ltd.	Main profiles	Un	Customiza	ation	I
Delivery		PC00	01	Standard Prod Loc 3	ZZ03	Internal Supplier 3	Standard Products	Un	Alt. Stock	No	
		PC00	02	Standard Prod Loc 3	ZZ03	Internal Supplier 3	Standard Products	Un	Cost	1101	
🔨 Installation		- Site:	Wilowda	ale					Price		
Products		BKS0	1	BKS01-Loc 4	NSUP1	A & B Accessories Ltd.	Main profiles	Un	Rack		
F Products		BKS0	2	BKS02-Loc 4	NSUP1	A & B Accessories Ltd.	Main profiles	Un			
Stock		PC00	01	Standard Prod Loc 4	ZZ04	Internal Supplier 4	Standard Products	Un			
		PC00	02	Standard Prod Loc 4	ZZ04	Internal Supplier 4	Standard Products	Un			
Administration								1			

The Stock Set-up Form can be accessed from 'Stock\Stock'.The Non-stock Set-up Form can be accessed from 'Products\Products\Non-stock Products'.

Modifications to existing Crystal Reports

All the existing Crystal Reports are modified for a new more appealing and consistent look and layout.

Production Docu	ument	Limfor	Ltd			2/21/201:
PROD1 / 0003 AA01 Ardent Windo	ws	1/ DPT1 / F00 MIX-4	01 / 05		BB3/	Qty South Wa
Required 3/3/201	2	Production	3/1/2012		Delivery	3/2/201
System Design Description Size Frame size Glazing PVCColour Outer Frame Reinforcement Bead shape Coextruded Bead Gasket Colour Prod. Site Drainage	SY02 Ext. Glazed System 1 Casement Fixed with angled head 1369w x 1962h (40.6°, -40 1369w x 1962h (40.6°, -40 1369w x 1962h 4-16-4 Clear K White 72mm By rules Sloped Yes - Coex Black Home Concealed	88	Fixe	5D		
		↓ L	Viewed fro	m Outside		
Description	Stock No.	Qty	Size	Cut		osition
Outer Frame	OL072-WHT	2	902w	24.6\/ 40.6		^B
		2	903w			^A
		2	1369w	17		_A
		2	1374h	\/ 24.6		>1
		2		\/ 24.6 24.7\/		>1 <1
• •	Sp. Part	2	1374h	24.7\/	F	<1
• •	Sp. Part B67_WHT	2 2 2	1374h 833w	24.7\/ 40.6\/ 24.6	F	<1 6^B1
• •		2 2 2 2	1374h 833w 834w	24.7\/ 40.6\/ 24.6 24.7\/ 40.6	F	<1 6^B1 6^A1
		2 2 2 2 2 2	1374h 833w 834w 1265w	24.7\/ 40.6\/ 24.6 24.7\/ 40.6 \/	F	<1 6^B1 6^A1 6_A1
		2 2 2 2 2 2 2	1374h 833w 834w 1265w 1298h	24.7\/ 40.6\/ 24.6 24.7\/ 40.6 \/ 24.6\/	F	<1 6^B1 6^A1 6_A1 6>A1
		2 2 2 2 2 2	1374h 833w 834w 1265w 1298h	24.7\/ 40.6\/ 24.6 24.7\/ 40.6 \/	F	<1 6^B1 6^A1 6_A1
Angle Shaped Item D.G. Bead (Coex.) Glass 4-16-4 Clear K		2 2 2 2 2 2 2	1374h 833w 834w 1265w 1298h 1298h Size	24.7\/ 40.6\/ 24.6 24.7\/ 40.6 \/ 24.6\/	F 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	<1 6^B1 6^A1 6_A1 6>A1



Production Document

ABC Ltd Meadway House,		Quotation	
17, Brighton road,			
Surbiton Surrey, KT6 5LR			
UK			
Tel. ++44 0208 390 6147 Fax +	+44 0208 390 6147		
Email info@windowmaker.com			
То		Deliver to	
Ardent Windows			
7 Lustrum Avenue		7 Lustrum Avenue	
Portrack Lane		Portrack Lane	
Stockton On Tees		Stockton On Tees Cleveland	
Cleveland TS18 2RB		TS18 2RB	
Quote No.	Date	Customer Ref.	Responsible
aduoto no.	21/02/12		Chris

Thank you for giving my company the opportunity to provide you with the following quotation for your perusal. Should you require any further information, please feel free to contact me at the above number.

Line	Details		Qty	Rate	Disc %	Amount
0001 WA01	Living Room					
< 500 ×	500 1-OFF		1	750.25	0.00	750.25
8 FIXED	with arched head	t l				
FIXED	1000w x 1000h [r=567]				
8	4-12-4 Clear					
	PVC Colour	White				
	T-Joins	Welded				
g Right	Left Outer Frame	72mm				
•	Transom/Mullion	70mm				
	T-Sash (C'mnt)	75mm				
	Flyscreen	No				
Viewed from (White				
	Handle (C'mnt)	Cockspur				

Quotation

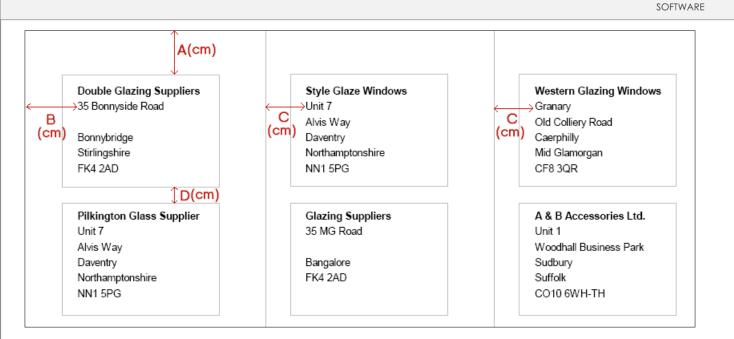
Stock Nett Is	sue History				A	BC Win	dows L	td					2/	20/2012
Site Supplier	1 Home NSUP1				Stock No. Date		HS - 24" 1 11 - 3/19/2							
Stock No.		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
10" TH HS		200	173	158	158	158	169	148	0	0	150	145	102	1561
10" TH STD		250	179	147	189	136	158	0	125	145	215	136	155	1835
12" EGRESS		0	0	347	0	0	0	158	215	125	0	0	0	845
12" SH HS		0	147	169	136	0	0	264	311	102	200	347	215	1891
12" SH STD		140	179	0	0	148	0	0	0	136	353	0	136	1092
12" TH HS		100	169	168	147	189	0	186	189	165	100	178	0	1591
12" TH STD		0	201	0	189	147	0	0	125	0	0	189	0	851
1200 ESPAG		0	0	0	0	0	0	0	0	145	0	0	0	145
16" EGRESS		0	190	0	0	0	0	0	0	0	0	0	0	190
16" SH HS		0	147	0	136	0	0	0	0	0	0	0	0	283
16" SH STD		0	0	0	0	189	125	0	0	0	0	0	0	314
16" TH STD		0	0	0	0	0	148	0	0	0	0	0	0	148
20" TH HS		0	0	0	0	0	169	0	0	0	0	0	0	169
20" TH STD		0	0	300	0	0	0	0	0	0	0	0	147	447

New Crystal Reports

Customer Labels / Supplier Labels

The user can now print labels with Customer or Supplier information (viz. Name, address).

This is useful when bulk mails (for e.g. invitations, greetings, newsletters), with stick on labels, are required to be posted to customers or suppliers.



WINDOWMAKER

Top N Customers / Top N Orders

Print a report to show Top N Customers (where N can be specified) in terms of order value in a given period of time. The report has both list and graphical representation.

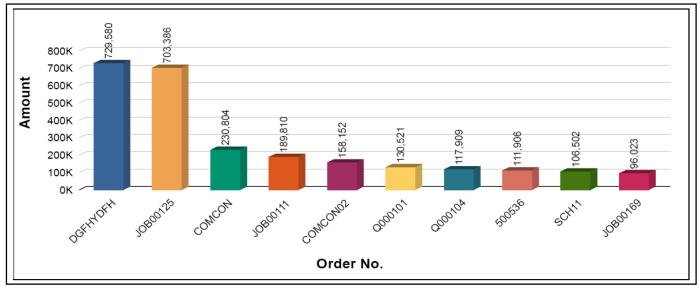
Similarly, you can print a report to show Top N Orders.

The report is useful in carrying out revenue analysis and lists the customers/orders contributing highest revenues in a particular period of time.

Тор 10	Customers	ABC	Windows Priva	ate Limited	1		28-11-11
Invoiced I Source	Date 23-11-10 - 23-11 All		Order Type Area	All All			
Custome	er Name		Amount	No. Orde	rs Area	Order Type	Responsible
AA01	Ardent Windows		2,119,170.93	67	Local	Domestic	Chris
AA09	Indigo Design & Engg / Lmtd	Associates Pvt	894,314.04	Э	Local	Domestic	SUPERVISOR
AF01	Afton Green Ltd		729,579.69	1	Local	Domestic	Goronwy
AB01	A B Company Ltd		318,187.93	36	Local	Trade	Wolfgang
DO02	Dolphin Windows		218,408.25	2	South	Domestic	Colin
AA03	AA Glazing		148,880.67	3	Local	Domestic	SUPERVISOR
AAAA000	00 Arthur Andrews Windo Products	ws Design &	135,517.40	Э	South	Commercial	Manager
CH01	Chipwell Glass		130,672.37	21	North	Trade	
GR01	Grosvenor Conservato	ries	99,417.18	12	North	Trade	
SU03	Sunview Windows		88,085.02	12	GY	Trade	John
TOTAL			4,882,233.48	16	0		

Top N Customers – List Representation



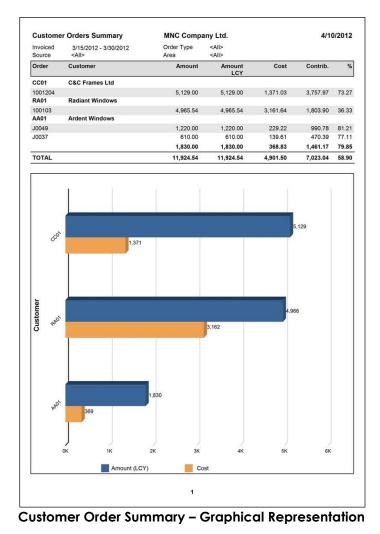


Top N Orders – Graphical Representation

Customer Orders Summary

Print a report to show profits and losses incurred within a particular period. The report has both list and graphical representation.

This report is useful in carrying out revenue analysis for a particular period.





New Orders by Period

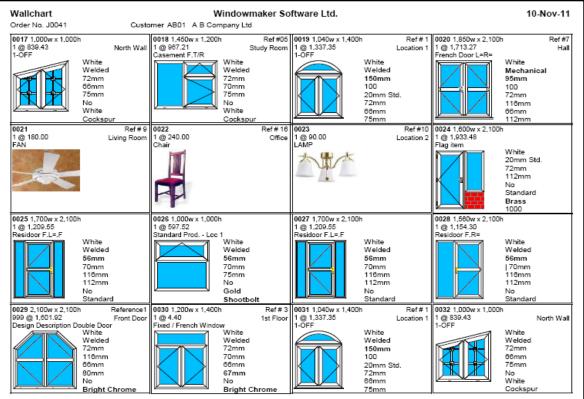
List all the Sales Orders received in a particular period.

The report will analyse the no. of orders received to gain insight of the revenue generated in given period.

New Orde	ers by Period	Windowma	aker Softwa	are Ltd		11/17/2011
Ordered Source	10/01/2011 - 10/31/2011 All	Order Type Area	All All			
Order No.	Customer	Cust. Ref.	Ordered	Required	No. Frames	Amount
J0040	Famous Glass	Victoria	10/01/2011	11/22/2011	3	2,227.75
J0056	Famous Glass - Branch 1	Cust PO-01163A	10/05/2011	11/26/2011	52	35,360.00
J0041	Arthur Andrews Windows Design & Products	Cust PO-011C	10/05/2011	11/30/2011	3	994.29
J0043	Abbey Stained Glass	Cust PO-01192C	10/07/2011	11/26/2011	4	2,227.00
J0044	Easiglaze Ltd	Cust PO-01892Y	10/10/2011		70	45,220.00
J0055	A&B Glass Co Ltd	Cust PO-01190P	10/12/2011	11/23/2011	51	27,744.00
J0053	Famous Glass	Cust PO-01156L	10/17/2011	11/28/2011	3	2,227.75
J0048	A&B Glass Co Ltd	Cust PO-6592M	10/19/2011	11/19/2011	50	27,200.00
J0047	Chipwell Glass	Cust PO-45192Z	10/20/2011	11/21/2011	78	55,575.00
J0049	Burbage Custom Windows		10/25/2011	11/25/2011	999	659,589.75
J0037	AA Insulations Ltd	ADG Glass	10/26/2011		2	1,648.25
J0054	Abbey Stained Glass	Cust PO-01167N	10/29/2011	11/30/2011	4	2,227.00
Total					1319	862,240.79

Sales Lines Wall Chart

Print a report to give a pictorial representation of all the Sales Lines of a particular Sales Order / Sales Quote. The chart could work as an addendum/appendix attached with a simplified Quotation (not including Sales Line graphics).





Sales Analysis

Three new Sales Analysis crystal reports are now available:

1. **Sales Analysis –** This is a crystal report replacement for the old way native Sales Analysis report (which can be run from Process\Sales Analysis from the earlier versions). The report allows analysing sales based on different analysis codes. The report has both list and graphical representation.

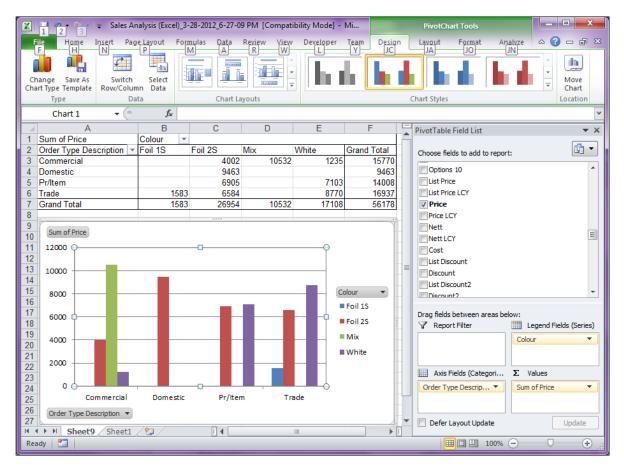
Invoiced	nalysis		AB	C Company			13/12/	2011
Invoiced	01/01/2011 - 01/12/2							
Area	No. Frames	Gross	Discount	Amount	Amount LCY	Cost	Contrib.	%
Source	Advert							
South	20	14,500	725	13,775	13,775	3,071	10,704	85.0
Central	18	10,980	549	10,431	10,431	1,361	9,070	85.0
S East	18	10,980	549	10,431	10,431	1,361	9,070	85.0
Local	17	10,370	519	9,852	9,852	1,285	8,566	85.0
North	15	9,150	458	8,693	8,693	1,134	7,558	85.0
West	14	8,540	427	8,113	8,113	1,059	7,054	85.0
N East	9	5,490	275	5,216	5,216	680	4,535	85.0
	111	70,010	3,501	66,510	66,510	9,952	56,558	85.0
Source	Canvass							
Central	41	24,825	1,241	23,584	23,584	3,266	20,318	84.1
Local	31	23,160	1,158	22,002	22,002	3,421	18,581	84.1
S East	25	17,475	874	16,601	16,601	2,661	13,941	84.1
S Lasi	25	17,475	074	10,001	10,001	2,001	15,541	04.
			13001	16695				
	02	32	6047 16752	1188 7584 14528	Cooperation of the second seco	24K 20K 16K 12K 8K 4K 0K S		

2. Sales Analysis (Pivot Table) – This is a similar report but the 'list' is formatted in a way that can be exported to MS Excel and the data can be analysed further easily using pivot tables and pivot charts in MS Excel.



Sales Analysis	ABC	Company Ltd.			4/12/2012
Invoiced 4/1/2012 - 4 Source - Area	/12/2012				
	Advert	Canvass	Recommend.	Repeat bus	
East	4,195	3,496	4,894	2,796	15,380
Local	5,593	4,195	5,593	3,496	18,876
Middle	4,894	3,496	6,292	4,894	19,575
North	3,496	4,894	2,097	6,292	16,778
Rest	4,894	6,292	4,195	3,496	18,876
South	2,097	3,496	4,894	4,894	15,380
West	4,195	2,796	3,496	6,292	16,778
	29,362	28,663	31,460	32,159	121,643

3. Sales Analysis (Export to Excel) – This is a list type report that can be exported to MS Excel and which has all the possible analysis codes and values. In MS Excel, you can analyse the data on the desired analysis code(s) and analysis value(s) using pivot tables and pivot charts. See sample below.



Requirements Summary

New Crystal Reports that can print summary of the components required for a:

- 1. Sales Quote/Sales Order
- 2. Production Batch

This is a replacement of the native Parts Usage report.



Frame Labels

A new Crystal Report that can print Frame labels, with necessary details to help in production, delivery or tracking processes, is now available.

SO1/ 0001/ 1 Location03	AB01 Account 0 SY01	1,Trade (Normal,Ex1 INT.C'mnt,T&T,Do		5	1/ PB07 /F002 /01 19/02/2012 Sun 48.0000w x 48.0000h
Left FixeD	Colour Foil 2S Outer Frame Extras 1 C'ment T-Sash T-Joins T/M Stan.	Foil 2S Golden Yellow 50mm EX11 64mm Weld. Auto = 70mm 70mm	4-12-4 Clear Coeff. U 2.50		00000447000100 Limfort Ltd
SO1/ 0002/ 1	AB01 Account 0 SY01	1, Trade (Normal, Ex1 INT.C'mnt, T&T, Do		1	1/ PB07 /F002 /22 19/02/2012 Sun 15.9531w x 48.0000h
ice and in the second s	Colour Foil 2S	Foil 2S Golden Yellow	4-12-4 Clear		
FIXED G1	Outer Frame Extras 1	50mm EX11			

Title Options / COL Files

The program now allows Options of type Title to refer to a COL file for answers. Earlier only Options of type Finish could refer to a COL file for answers.

Having the Option answers in a COL file, instead of as Parts, makes their set-up and maintenance simpler, easier and quicker.

One Part per Profile

Usually a particular profile can be available and stocked in different types and colours of foils or paints. This means that practically the same profile with a 'basic' stock code can exist as more than one finished profiles, each with a different final stock code that identifies the finish. Currently, such basic profiles need to be set-up as separate, but almost duplicate, Windowmaker parts. This in turn means duplicate rules and matrices.

In **Windowmaker 2012**, for Option Answers set-up in COL file, the program allows abbreviation with asterisk(s) (i.e. '*'). The program also allows an Option to be associated with each '*' in the abbreviation. Each '*' in the abbreviation is replaced with the abbreviation of the answer of the corresponding option. The abbreviation with '*'s replaced in turn replaces the '*' in the main part stock no.

This will now allow achieving the above use case by setting up just a single Part, thus eliminating the need for duplicate parts, rules and matrices. This makes the set-up and maintenance of data simpler and easier.

New Combination Pane types for Folding doors

It will now be easy and quick to create designs with Folding doors as these are now available as Combination Pane types. The setting up of rules for folding doors becomes simpler, as it will now be possible to test on these using the new Combination Pane types.

Note: The availability of the folding door combination pane types is subject to appropriate data set-up. Refer Help file for more details.



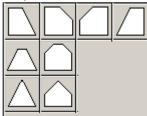
	es & Glazin		
Single	Combination	Glazing Panels	
)or		1
1000	$\neg \nabla$	202 Inward	
	∇	220 Inward	
		303 Inward	
	$\frown \bigtriangledown$	312 Inward	
	∇	321 Inward	
		330 Inward	
		404 Inward	
	$\overline{}$	413 Inward	
	\bigtriangledown	422 Inward	
		431 Inward	
	∇	440 Inward	
		505 Inward	
		514 Inward	
		523 Inward	
	\bigtriangledown	532 Inward	
		541 Inward	
		550 Inward	
		606 Inward	
		615 Inward	
		624 Inward	
		633 Inward	
		642 Inward	5



Enhancements to Options

Angled Shapes II

The program now allows vertical couplers and mullions to be placed at the rake nodes in the following angled shapes:



Pricing Extras

The details of Pricing Extras used in a Sales Line will now always be stored in the WMBom table.

This made the Pricing Extras 'Store from' and 'Delete from' Preference (Output page) settings redundant and hence are removed.

This also made the "_De" attribute, that indicated and controlled dummy Pricing Extras BOM generation, in the Crystal Report RPT file naming convention redundant.

Note: For existing Sales Lines at status below the (now obsolete) 'Store from' status specified in Preferences, the Pricing Extras will only be stored if such a Sales Line is re-calculated using the new version.

Advanced Data Set-up Tools

Export Rules

Windowmaker now allows to export all Rules of a System into a <Tab> delimited text file. This file can be opened and printed using Microsoft Excel or Notepad.

This makes the analysis, verification and trouble-shooting of the Rules set-up easier and more convenient.



Production Scheduling

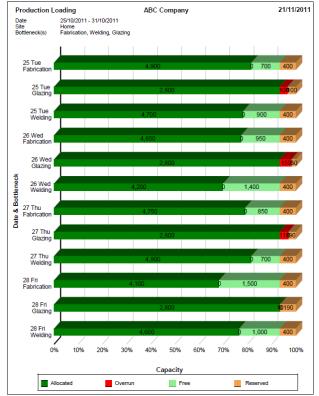
Print a report to show the production loading using bar charts for specified work centres on the production floor.

It assists the production manager to plan the production process better:

- Allocate work to a day where too much free capacity left
- Decide how and where to fit an urgent order,
- Decide what overtime and resource arrangements are required to cope up with the overrun of normal capacity of a bottleneck etc.

The existing report now:

- Allows generating loading of multiple bottlenecks or group of bottlenecks.
- Takes into consideration the overrun of bottlenecks (i.e. allocation exceeds the normal capacity for the bottleneck)



Production Loading Crystal Report



Production Batch 'Complete' Status

It is now possible to progress a Production Batch to a new 'Complete' status. 'Progressing' a Production Batch to 'Complete' status will move all the contents (i.e. Sales Headers) in the batch to 'In Despatch' status. If a Sales Order is split across more than one Production Batches then moving the status of one of the Production Batch to 'Complete' will not move the status of that Sales Order to 'In Despatch'. Status of such a Sales Order will be moved to 'In Despatch' only if the status of all production batches in which it is scheduled is at 'Complete' status.

The 'Complete' Production Batch view now lists all the Production Batches at 'Complete' status, instead of 'Processed' ones. The Production Batches at 'Processed' status are shown in the 'Live' view.

Note: Any existing Production Batches that are technically complete will not be flagged as 'Complete' automatically by the program. They will remain as is.

Optimised Costing / Pricing

In **Windowmaker 5**, the Optimised Costing/Pricing 'process' can be run on a 'batch' of Sales Quote/Order from the 'Process' menu on the main window.

In **Windowmaker 2012**, it is possible to run this directly from the Sales Quote/Order input notebook. It does not require one to create a 'batch' to be able to run this.

Tracking

The Windowmaker logo will now be displayed on all Tracking screens.