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

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Windowmaker 2012 R5.3

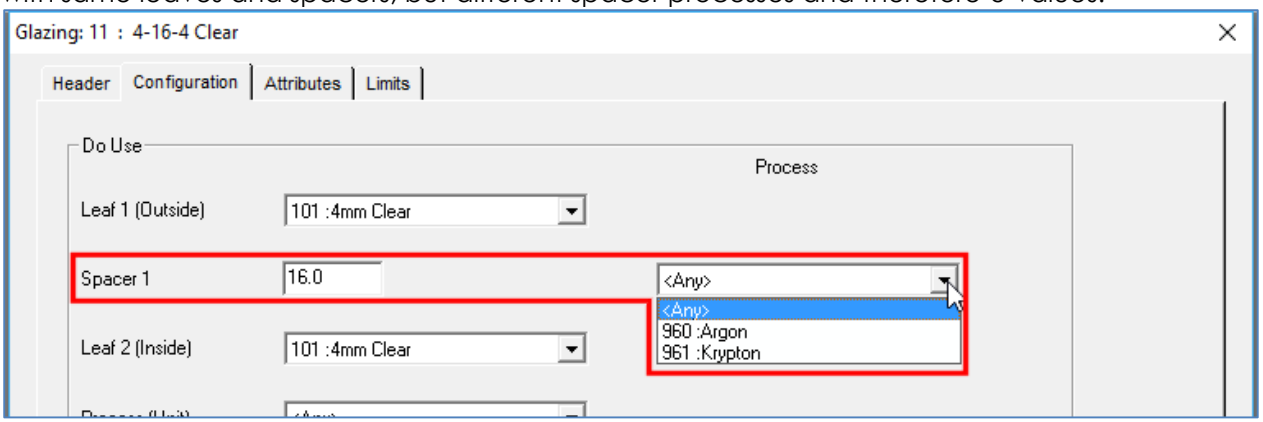
General Enhancements

Windows Server 2016 for Windowmaker

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

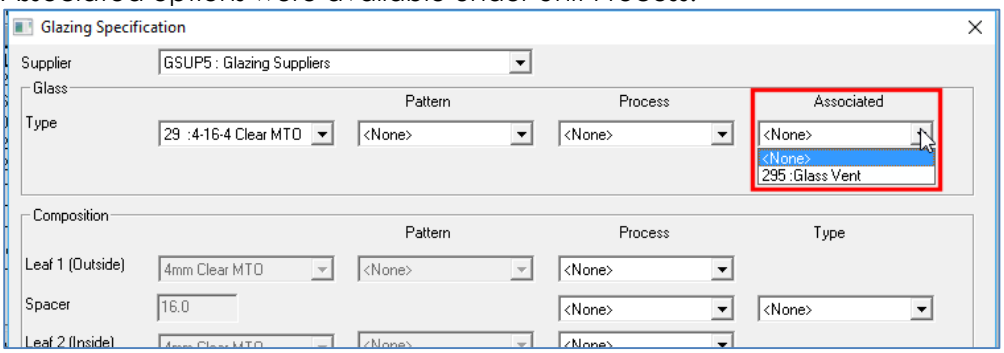
Glazing: Set-up

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: Order Entry

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



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.

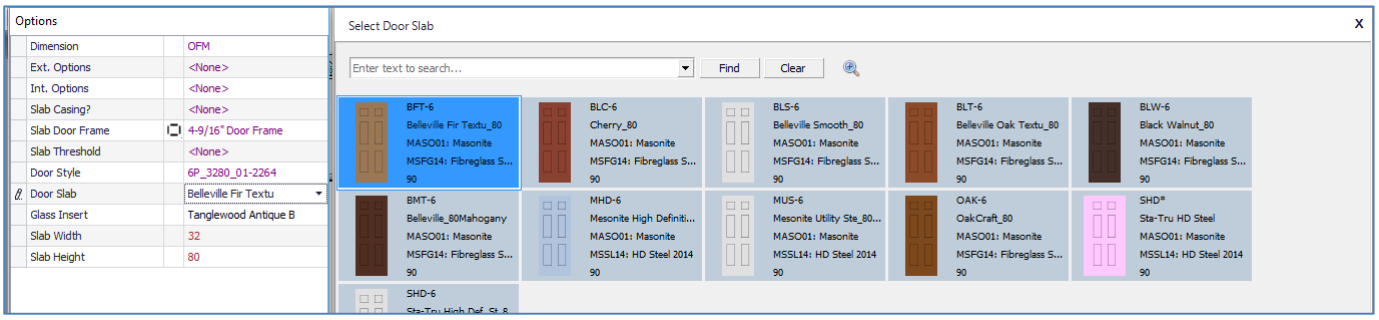
Enhancements to Options

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

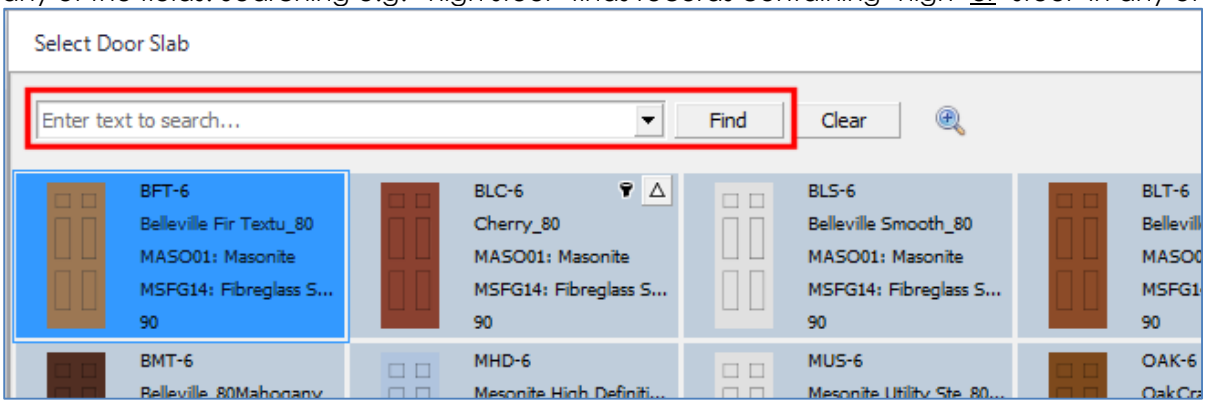
This helps making selection easier.



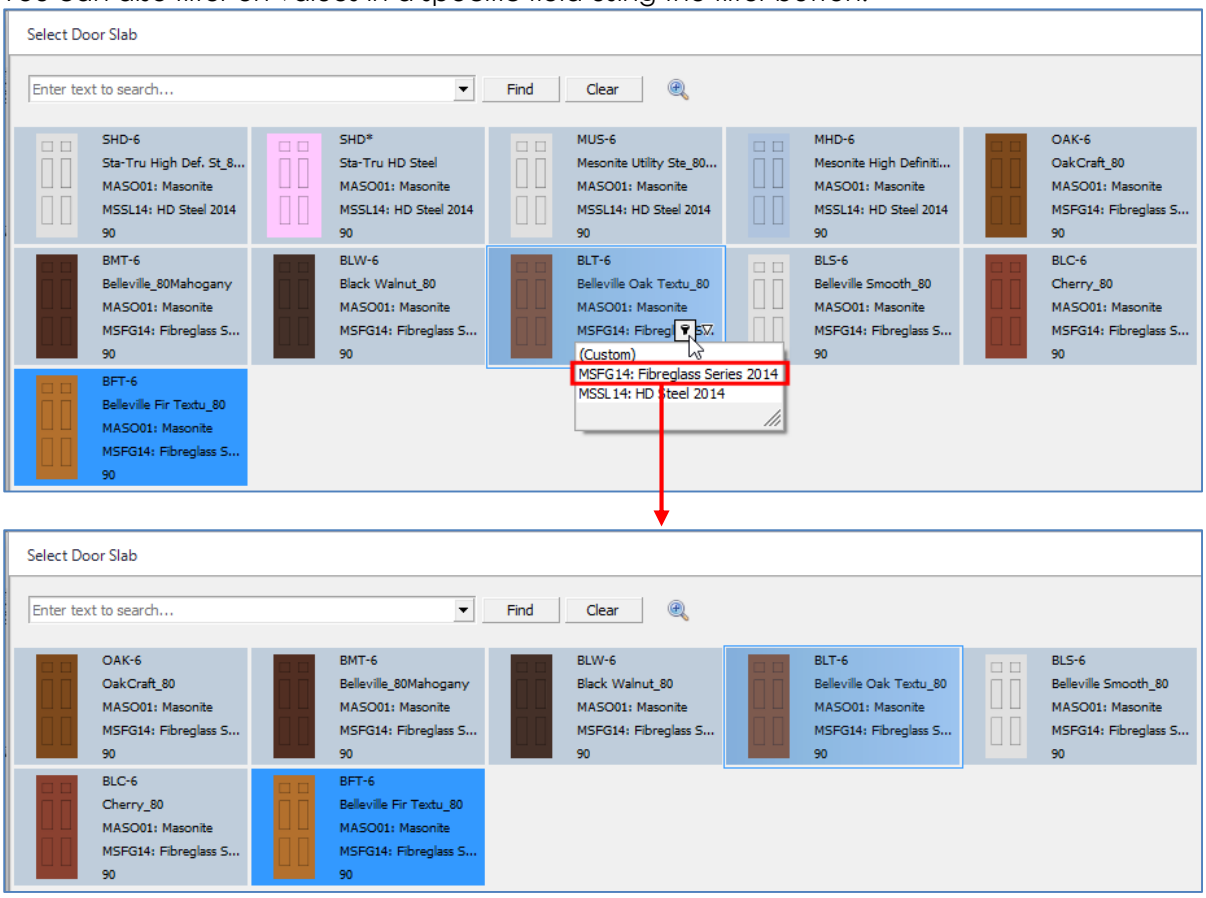
Selection of the required product is made even simpler using:

Filter

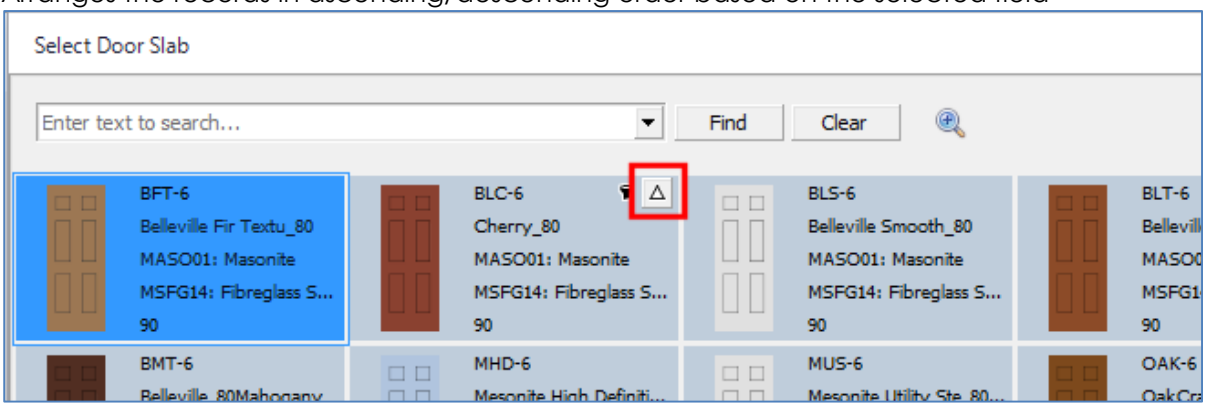
Search records containing specified text e.g. "high +steel" finds all records containing 'high' and 'steel' in any of the fields. Searching e.g. "high steel" finds records containing 'high' or 'steel' in any of the fields.



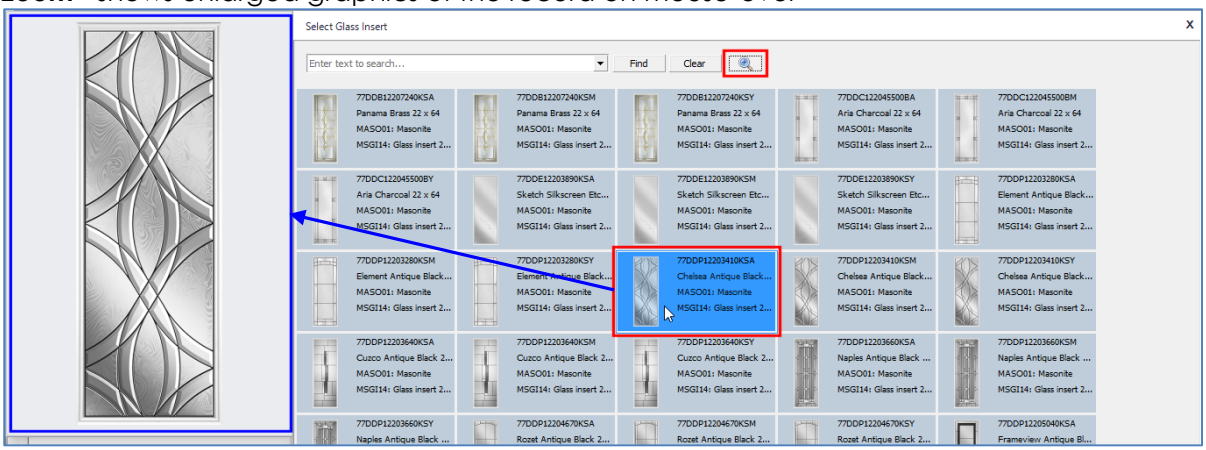
You can also filter on values in a specific field using the filter button.



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



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

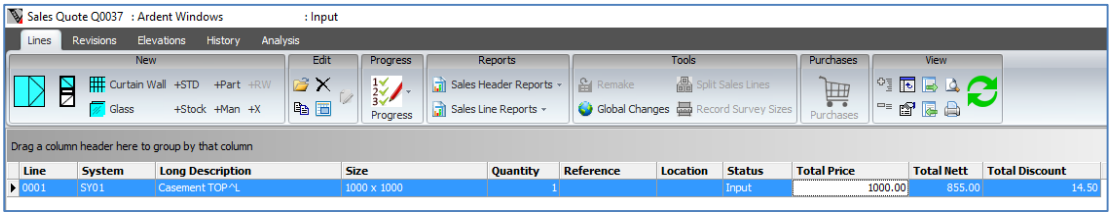
General Enhancements

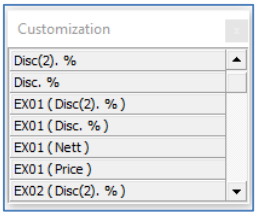
Glazing

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

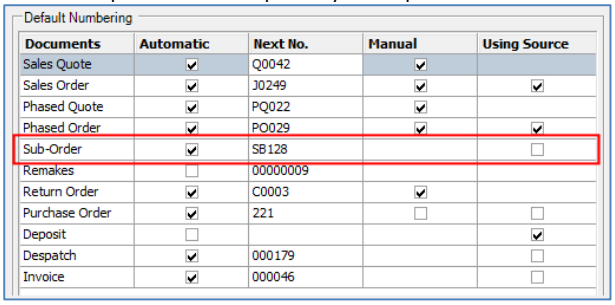
The program now allows entering quantity > 1 for non-design Sales Lines while setting up Property Products.

Property Types, Surveying

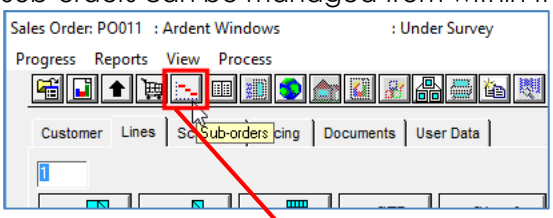
You can now specify Property Location for non-design Sales Lines in Phased Quotes. This enables such Sales Lines to be specific to plots, thereby allowing it to be split per plot.

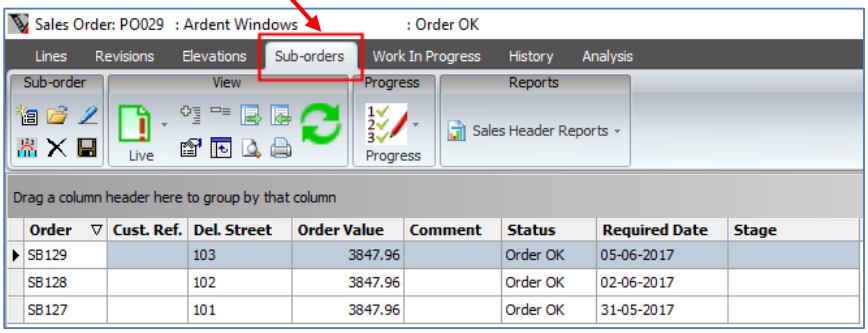
Commercial Contracts

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



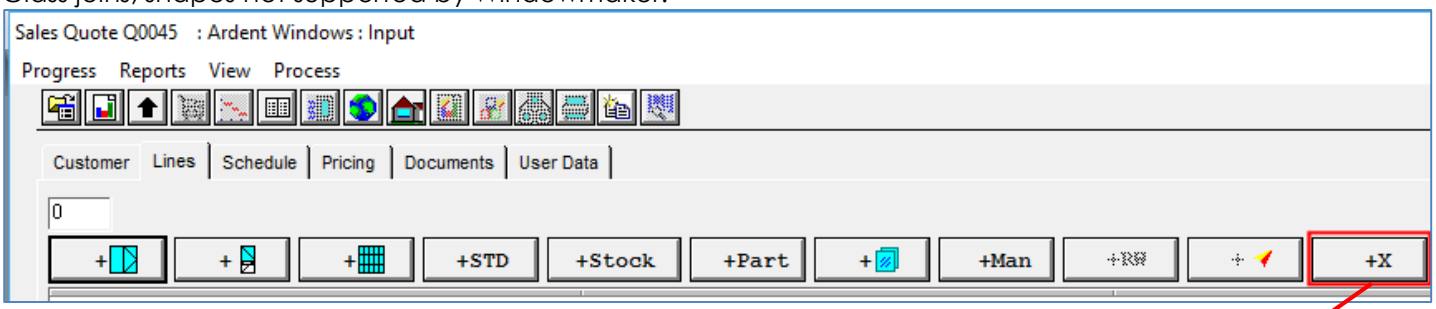
Sub-orders can be managed from within the Phased Order.

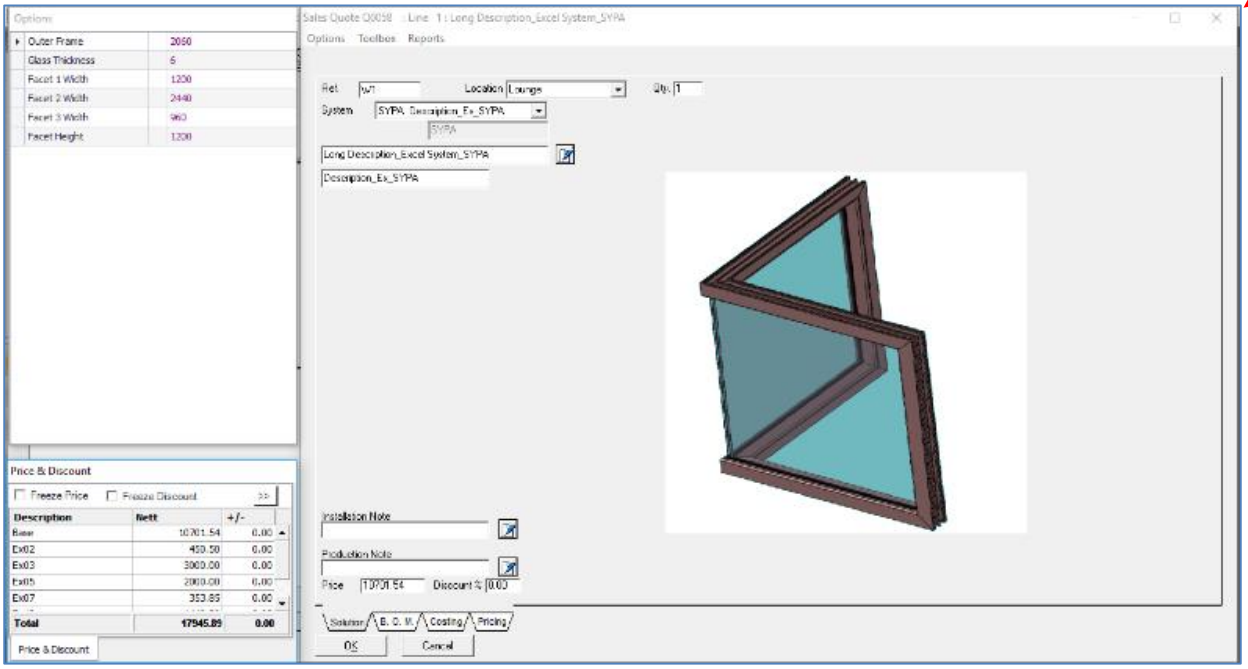




Excel-based Rules

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.



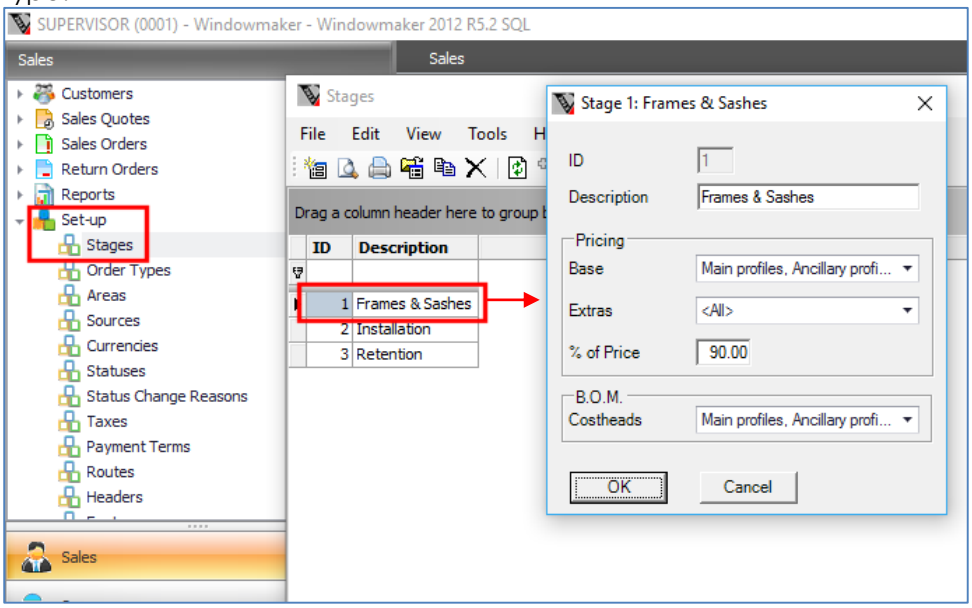


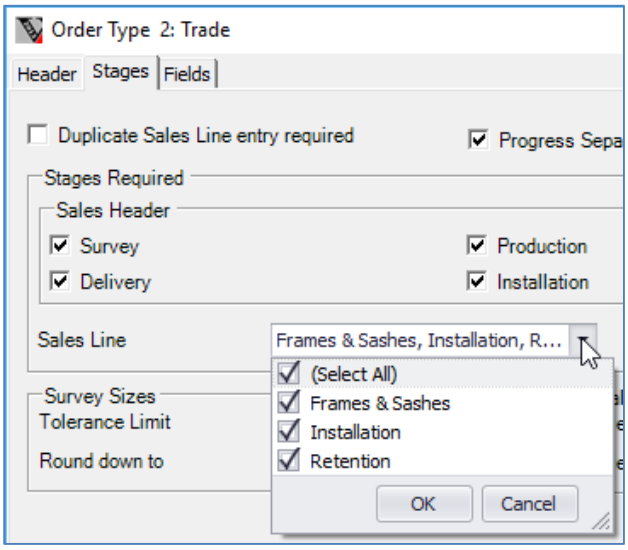
New Options

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.

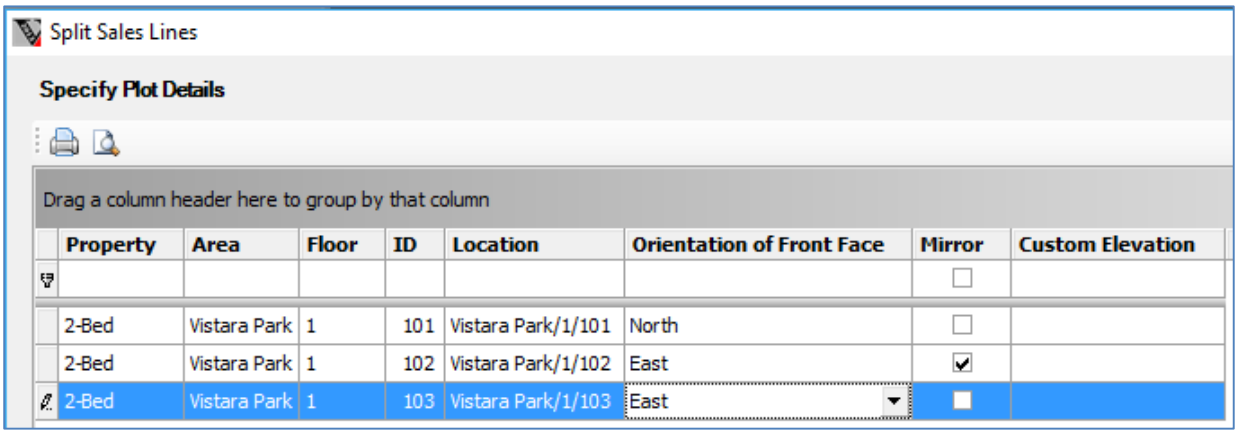
Price contribution of the Stage can be defined as a percentage of a set of Costheads and Extras. You can also define the Costheads to be included in the BOM. Stages applicable need to be defined on the Order Type.



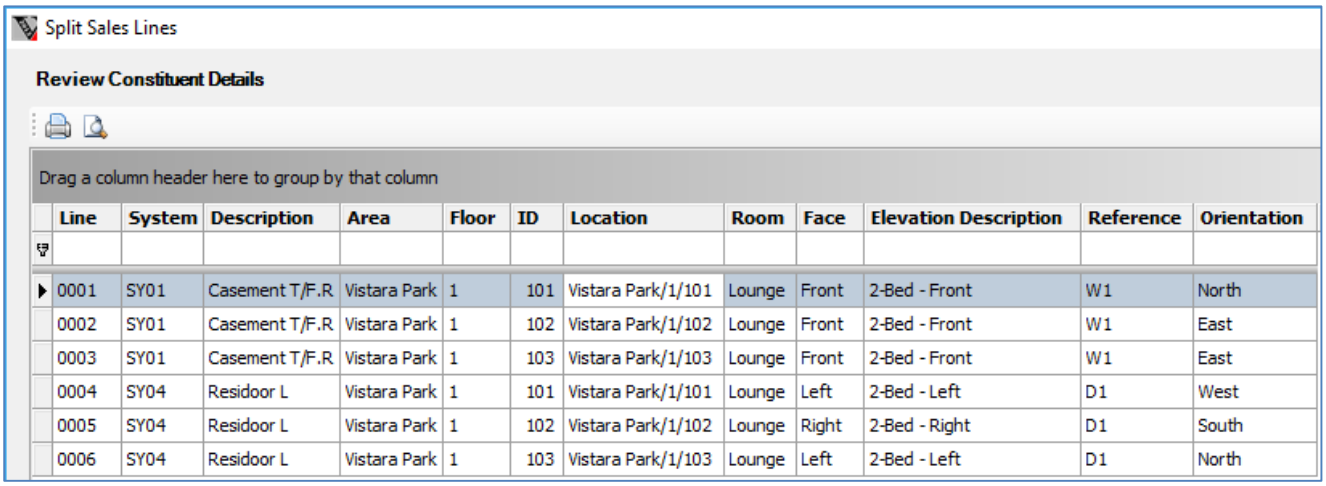


When a Phased Order is progressed to Under Survey,

- 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.
  - 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.



Property	Area	Floor	ID	Location	Orientation of Front Face	Mirror	Custom Elevation
2-Bed	Vistara Park	1	101	Vistara Park/1/101	North	☐	
2-Bed	Vistara Park	1	102	Vistara Park/1/102	East	☑	
2-Bed	Vistara Park	1	103	Vistara Park/1/103	East	☐	



Line	System	Description	Area	Floor	ID	Location	Room	Face	Elevation Description	Reference	Orientation
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

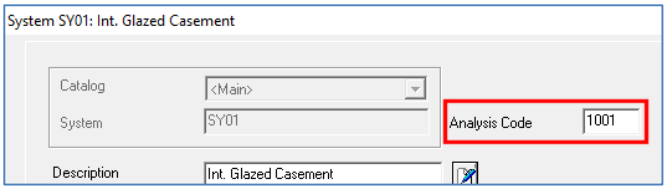
Windowmaker 2012 R5.1

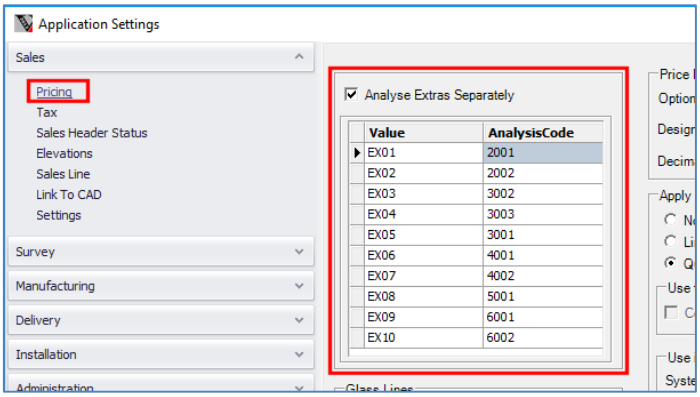
General Enhancements

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.





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

Analysis **Windowmaker** **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.

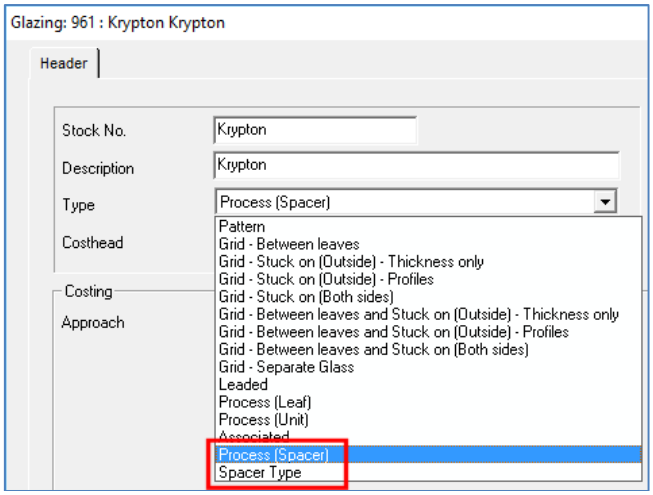
For Triple and Quadruple Glazed Units the program now allows to:

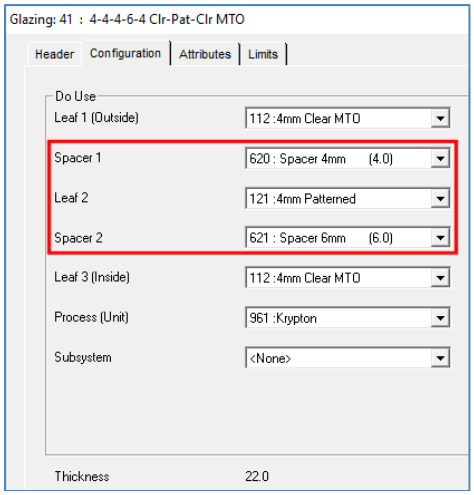
1. Specify separate thicknesses for each spacer
2. Use patterned glass for central leaves
3. Apply a process for each leaf

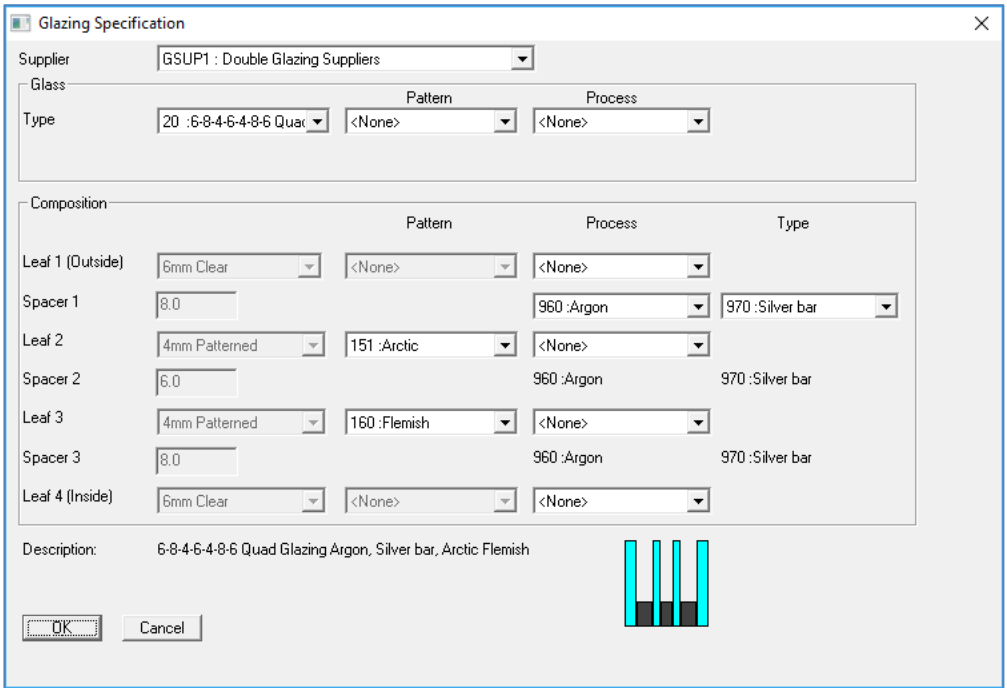
Sealed Unit (SU) Glazing Description:

Before Upgrade	After Upgrade
<SU Description> <Unit Pattern> <Process (Unit)> < Process (Spacer)> <Leaf Pattern - Outside> <Process (Leaf) - Outside >, <Leaf Pattern - Inside> <Process (Leaf) - Inside>	<SU Description> <Unit Pattern> < Process (Unit)> < Process (Spacer)> <Spacer Type>, <Leaf Pattern - Outside> <Process (Leaf) - Outside >, <Leaf2 Pattern> <Leaf2 Process>, (if applicable) <Leaf3 Pattern> <Leaf3 Process>, (if applicable) <Leaf Pattern - Inside> <Process (Leaf) - Inside>

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







Designs – Combination pane Types

Following new Pane Types are now available:

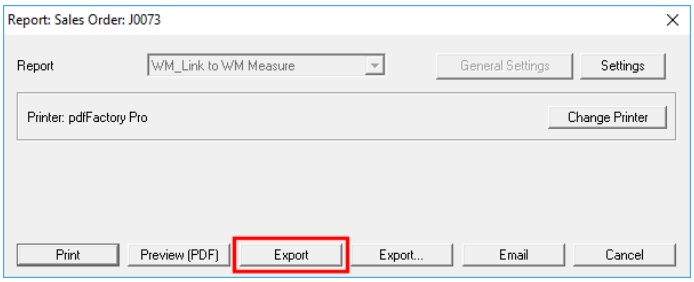
Design	Remarks
1. XiOmO 2. OmOiX 3. OmXiOiXmO	Two variants are available – X on the inner track and X on the outer track.
1. OiXiXiX 2. XiXiXiO	Now available for windows too.

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

Reports - Export

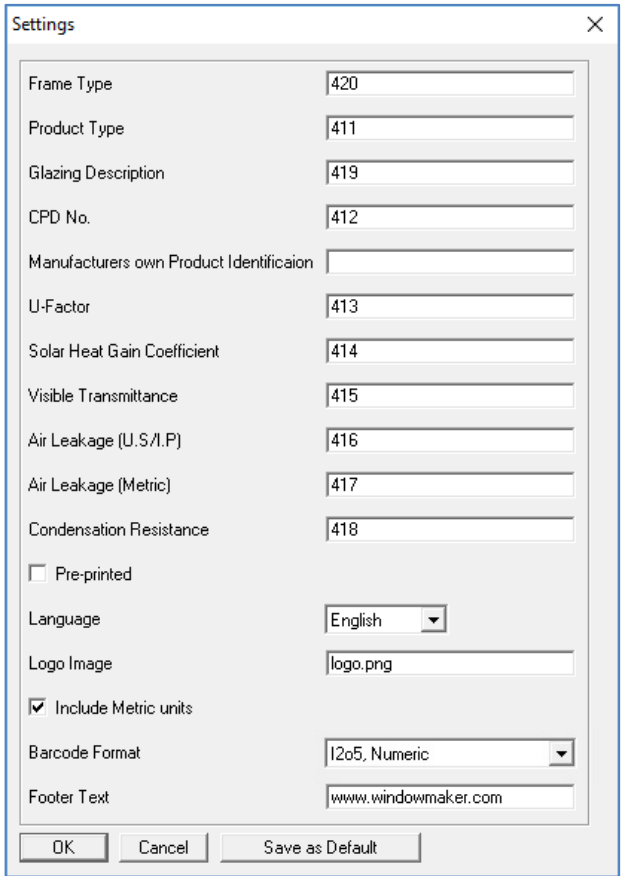
For ORD_ reports that are designed to be exported (using the Export button on Report dialog), the program now allows static text (as prefix/suffix/in between) to be included in the name of the exported file if defined through appropriate parameters e.g.:

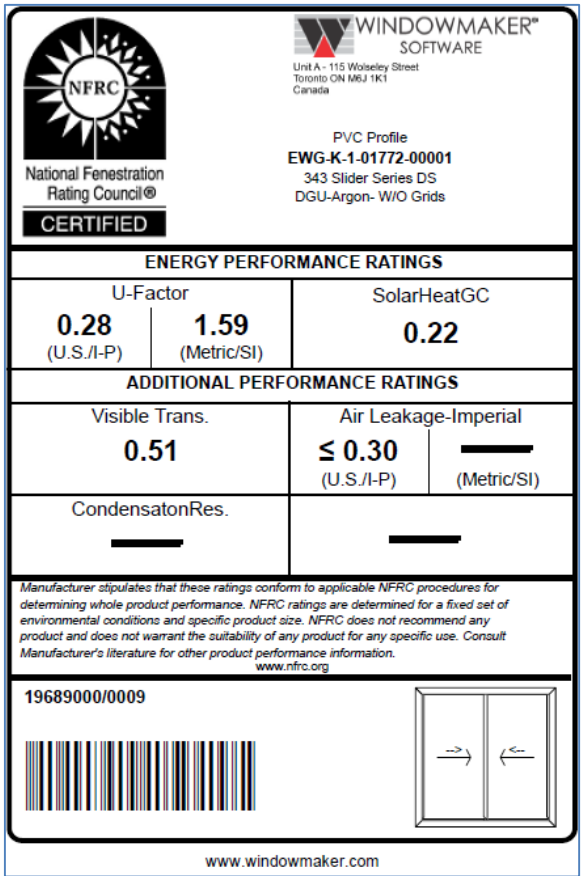
WM-ORDER_J0029_20-12-2016
J0029_20-12-2016_WM-ORDER



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.



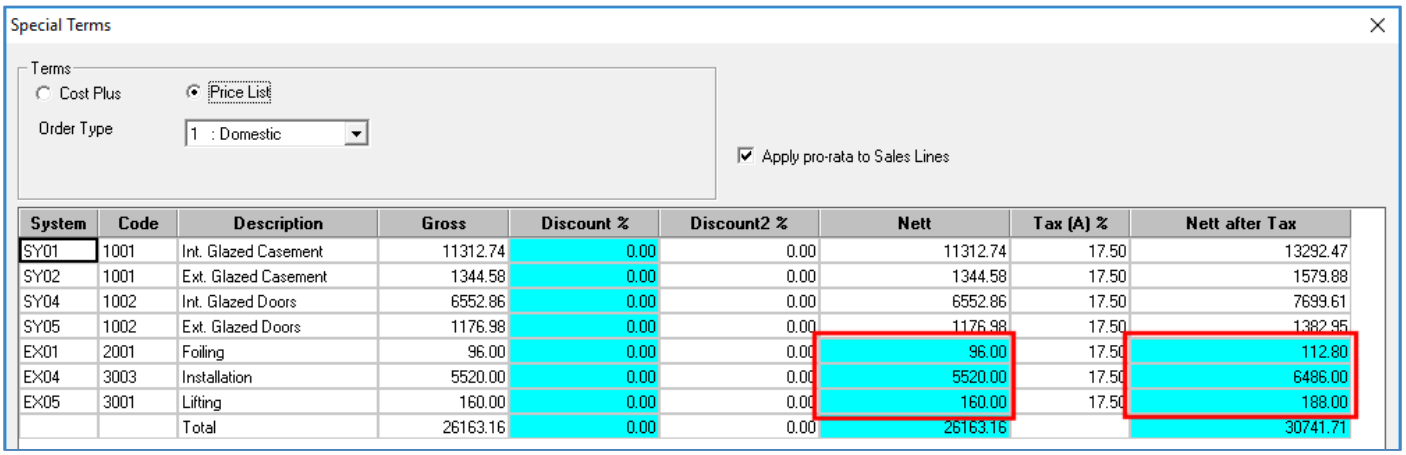


Enhancements to Options

Pricing - Extras

Pricing Extras categories have been increased from 3 to 10.

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



System	Code	Description	Gross	Discount %	Discount2 %	Nett	Tax (A) %	Nett after Tax
SY01	1001	Int. Glazed Casement	11312.74	0.00	0.00	11312.74	17.50	13292.47
SY02	1001	Ext. Glazed Casement	1344.58	0.00	0.00	1344.58	17.50	1579.88
SY04	1002	Int. Glazed Doors	6552.86	0.00	0.00	6552.86	17.50	7699.61
SY05	1002	Ext. Glazed Doors	1176.98	0.00	0.00	1176.98	17.50	1382.95
EX01	2001	Foiling	96.00	0.00	0.00	96.00	17.50	112.80
EX04	3003	Installation	5520.00	0.00	0.00	5520.00	17.50	6486.00
EX05	3001	Lifting	160.00	0.00	0.00	160.00	17.50	188.00
		Total	26163.16	0.00	0.00	26163.16		30741.71

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 Windowmaker Measure 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 AKS1805 welder.

Link to LogiKal

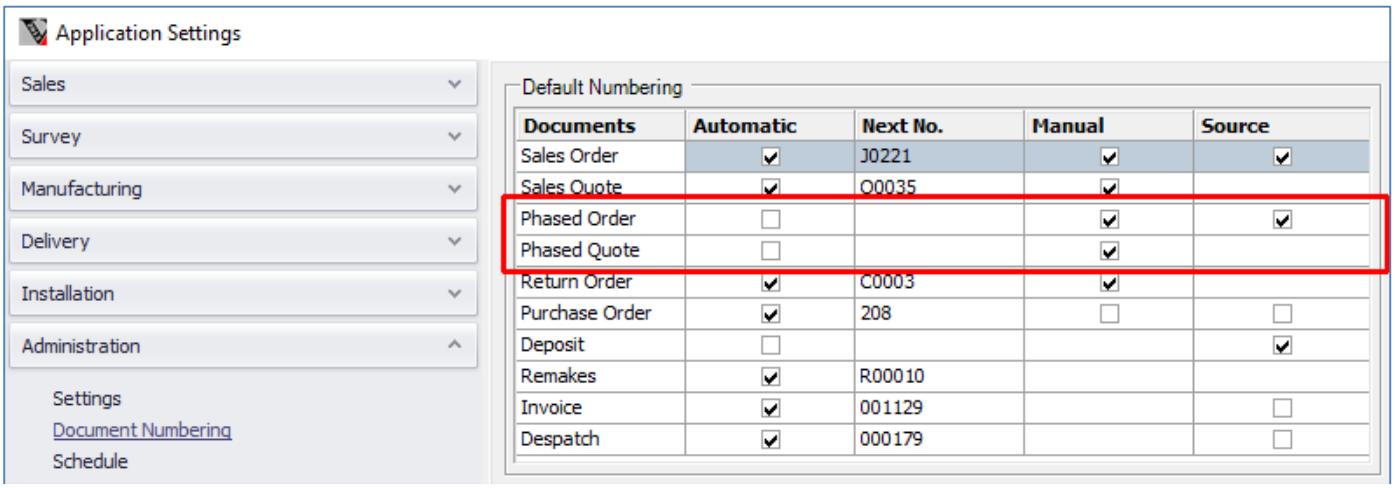
You can now specify Reference and Location for LogiKal Sales Lines.

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.



Property Types

Copy Sales Quote

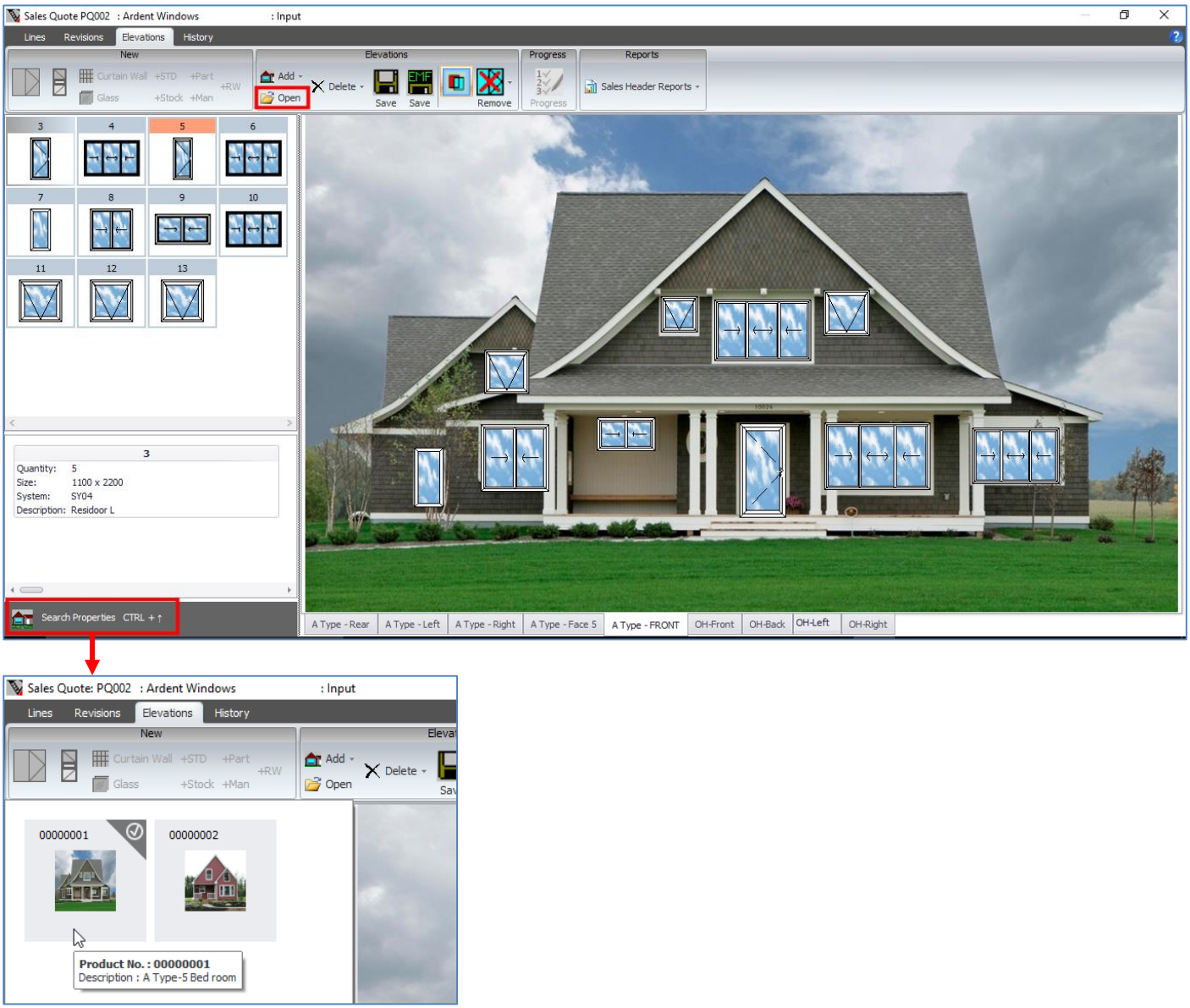
The program now allows to copy a Sales Quote containing Property Sales Lines from one customer to another. Elevations in the source Sales Quote are also copied. To achieve this, program automatically copies the relevant Property products from the source customer to the other customer.

Search Elevations

It is now possible to Search (Ctrl + ↑) 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

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

New Options

Remakes

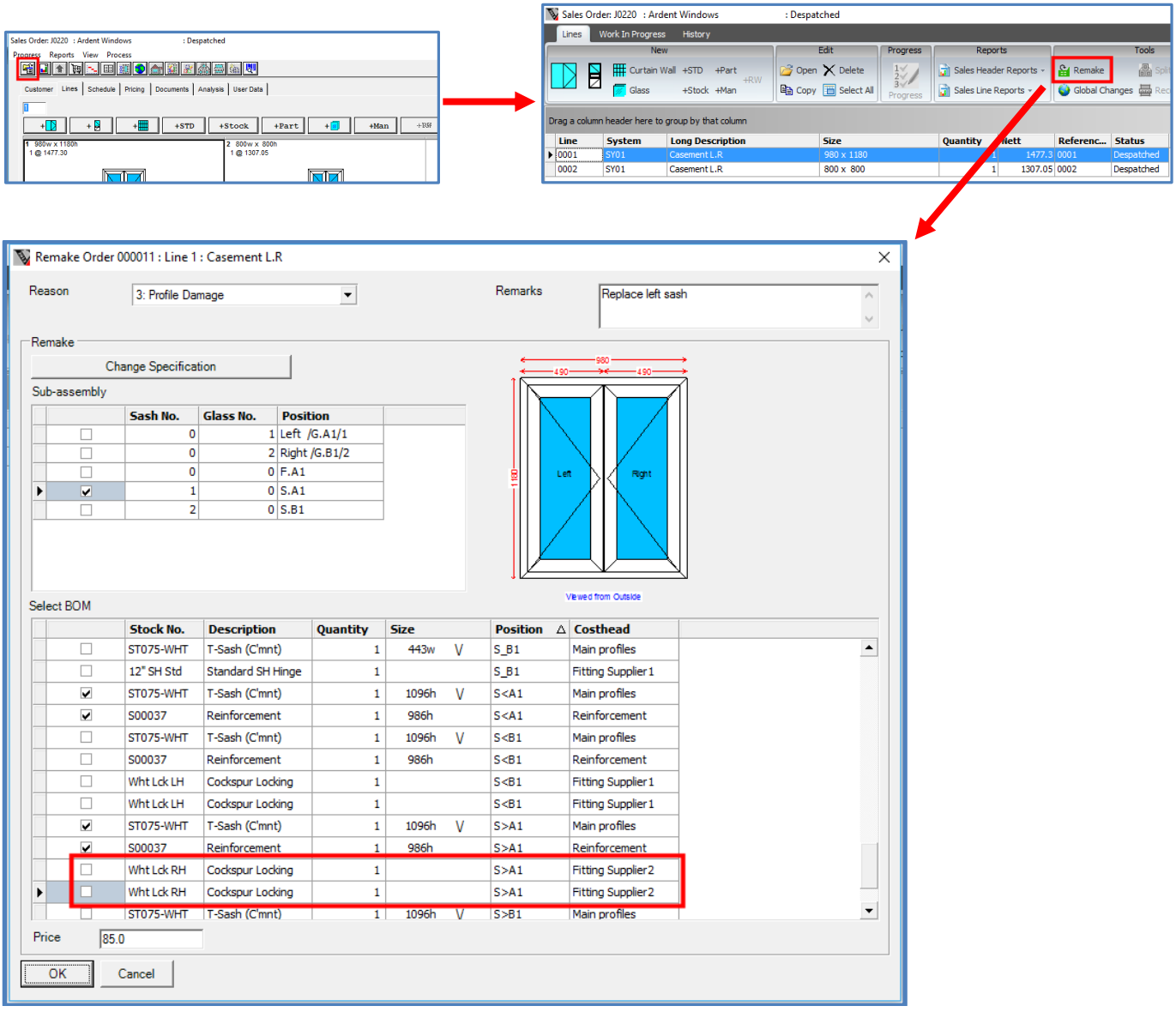
The program is now enhanced to handle remakes and replacement orders easily and more efficiently. Remakes may be required for various reasons such as damages, manufacturing mistakes, incorrect specifications or survey etc. Replacement orders are required to fix issues with already installed windows. 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.

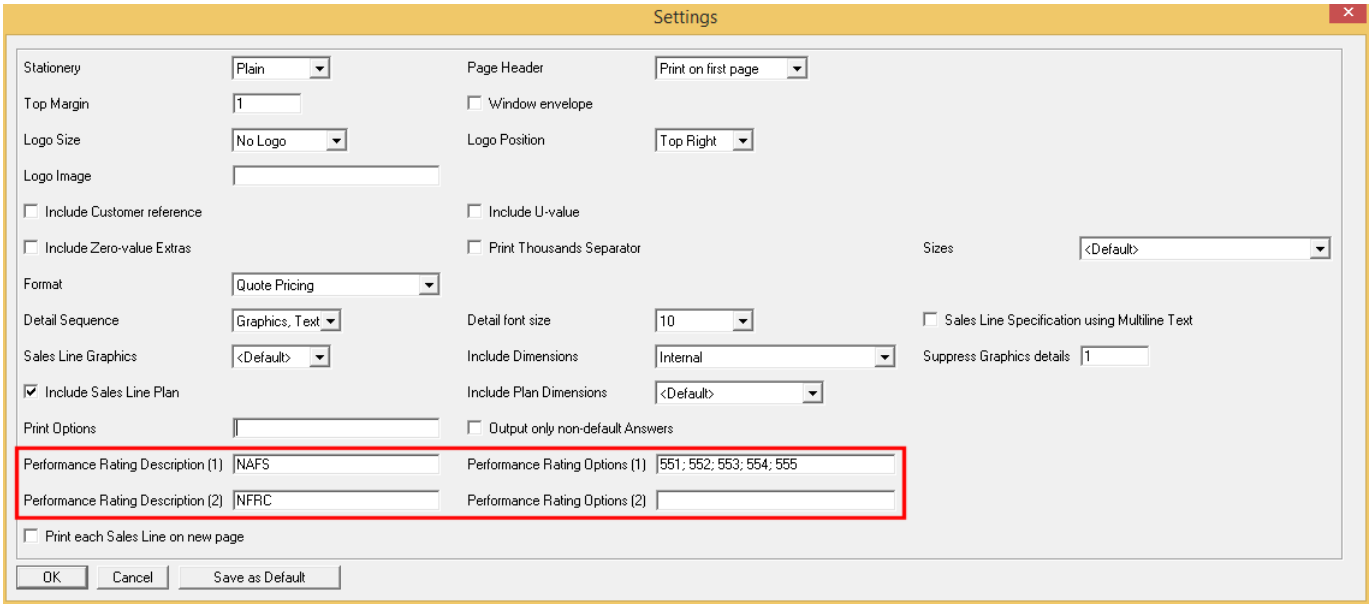


Windowmaker 2012 R4.8/R4.9

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.



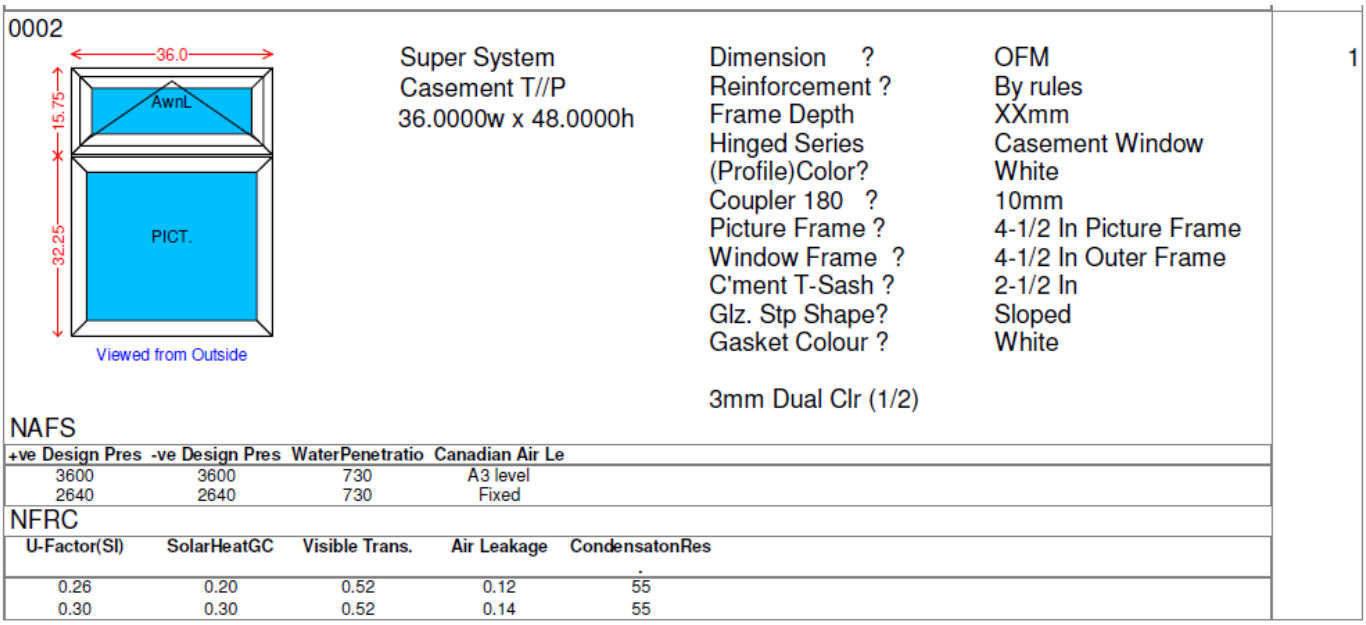
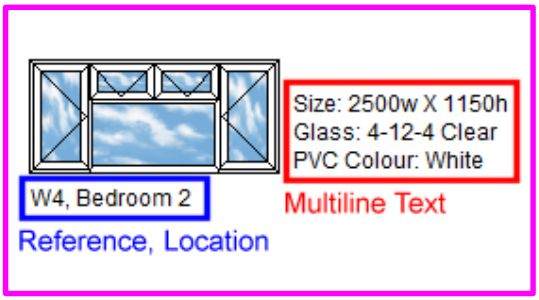
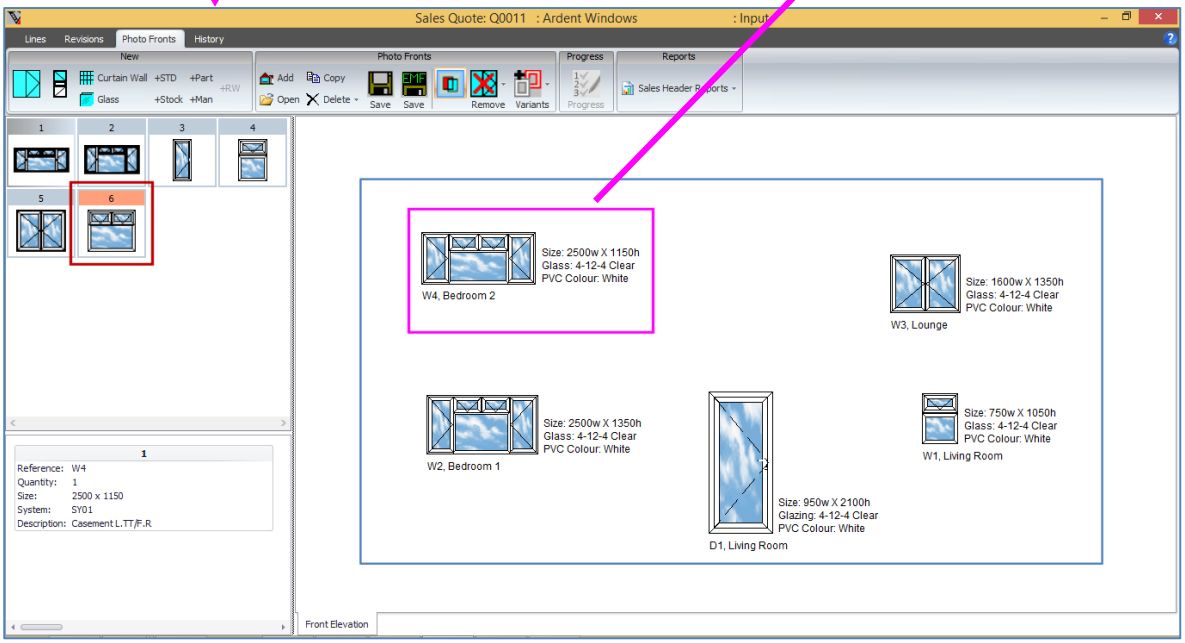


Photo Fronts

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.



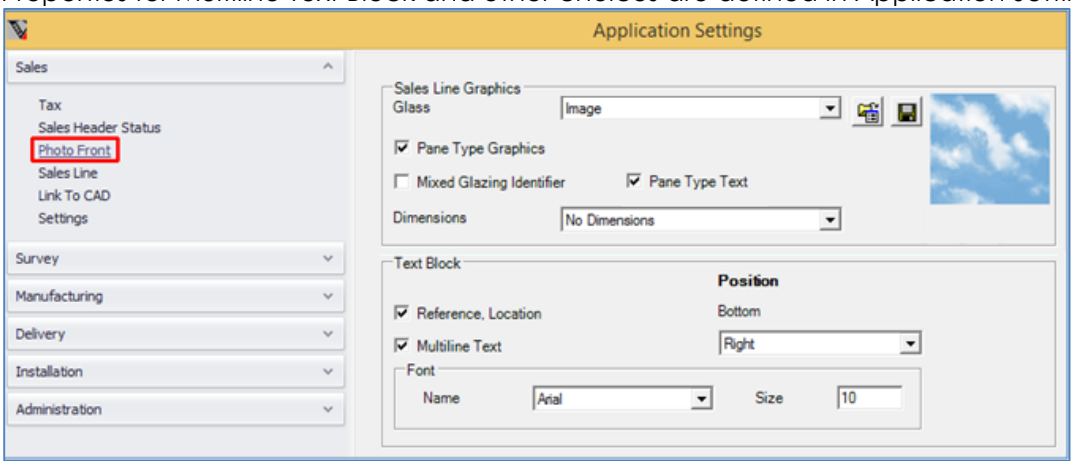


This facility makes it easy to print summary information of items alongside the elevation graphics on photo front or any custom report. Benefits of the facility include:

- 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:

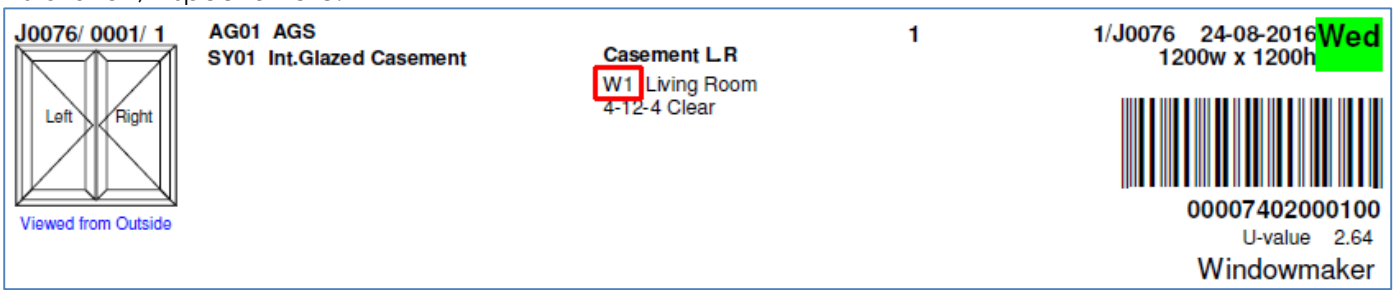


Non-design Sales Lines

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

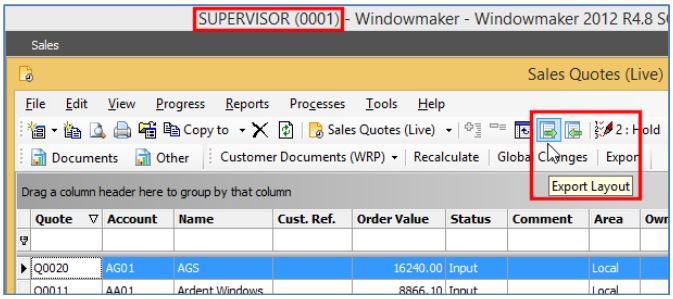
Frame Labels

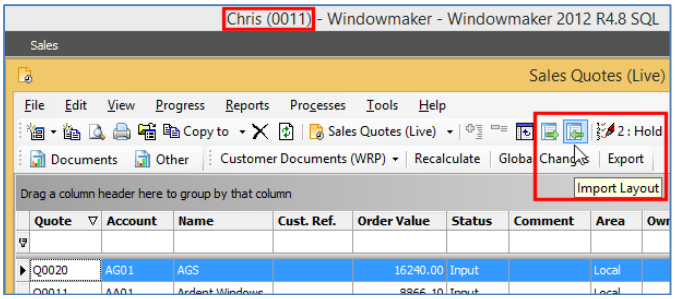
The program now outputs Sales Line Reference in Frame Labels. This helps to easily verify items during delivery, installation, inspection etc.



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.



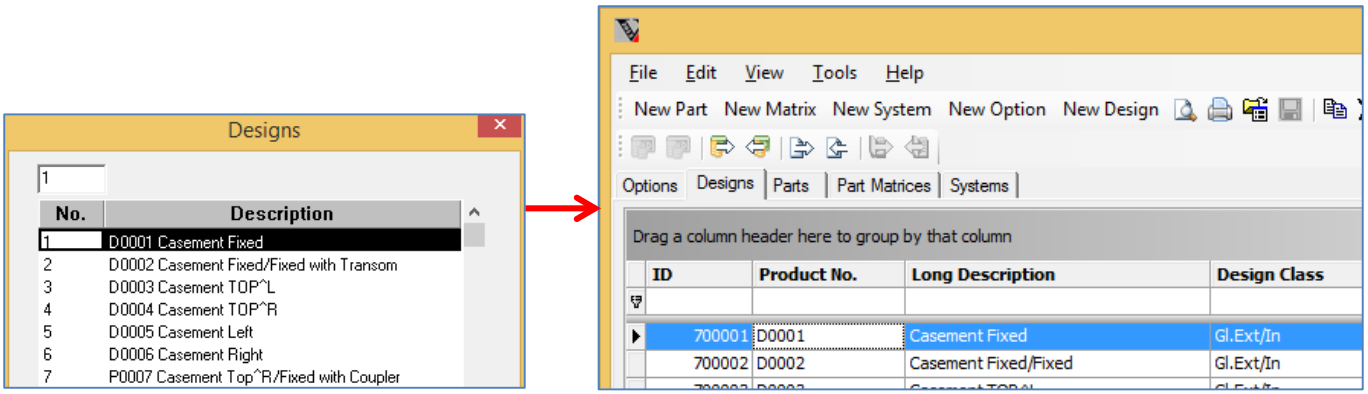


Designs Form

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.

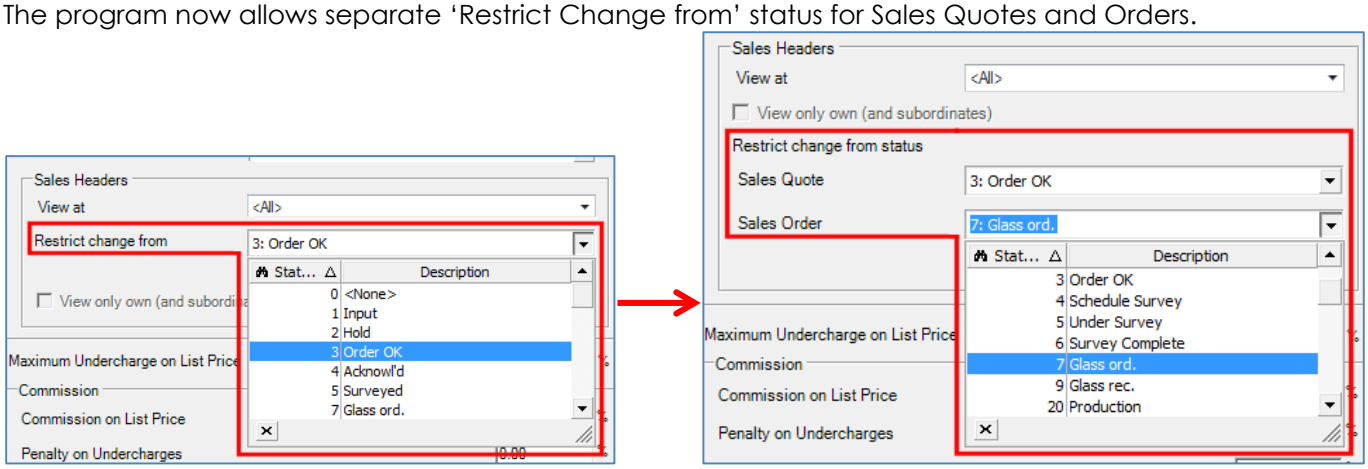


Stations: Saw/Rack/Welder/Glass Cutting/ Glass Optimiser

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

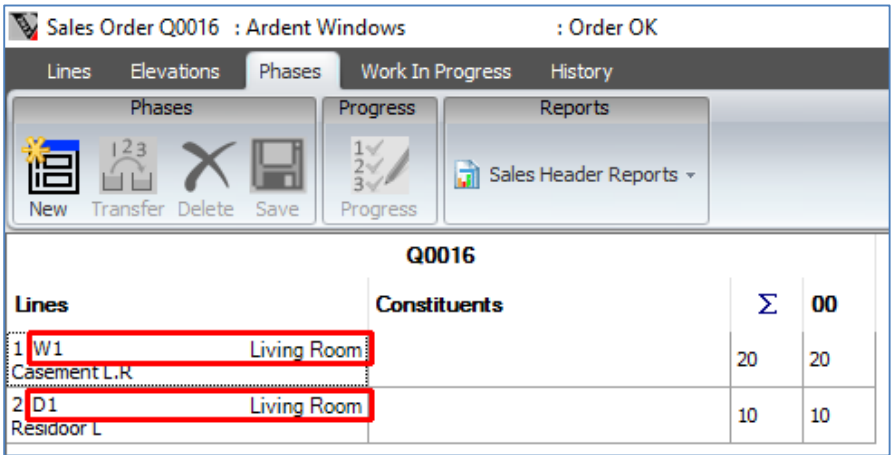
Windowmaker now supports SQL Server 2016. Refer below table for details.

SQL version	Windowmaker Express, Windowmaker Lite, and Windowseller		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
2016	Yes	Yes	Yes	Yes	No	Yes

Enhancements to Options

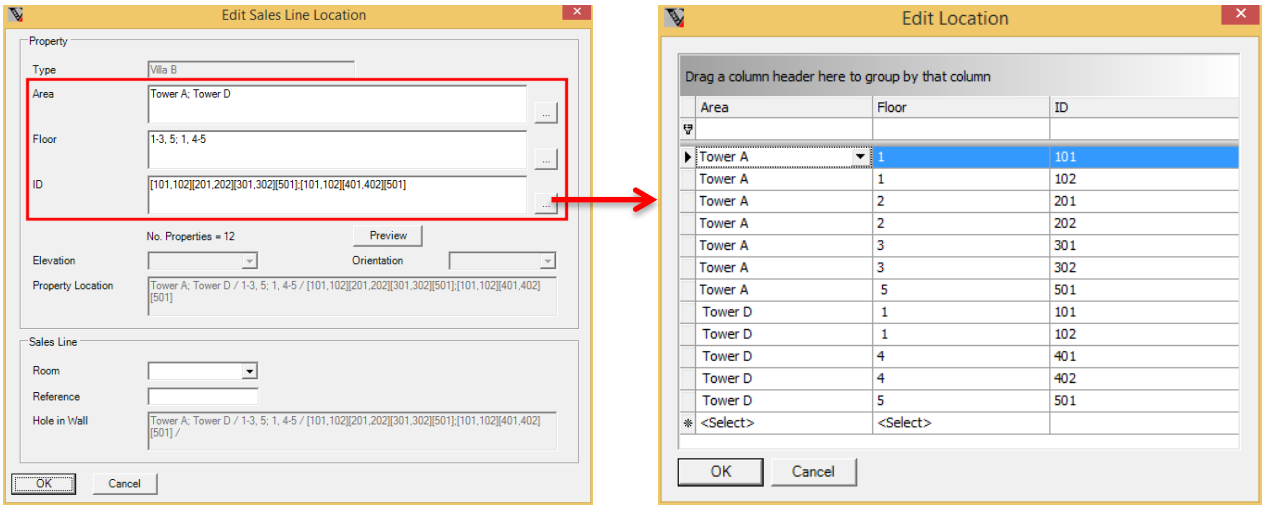
Commercial Contracts

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

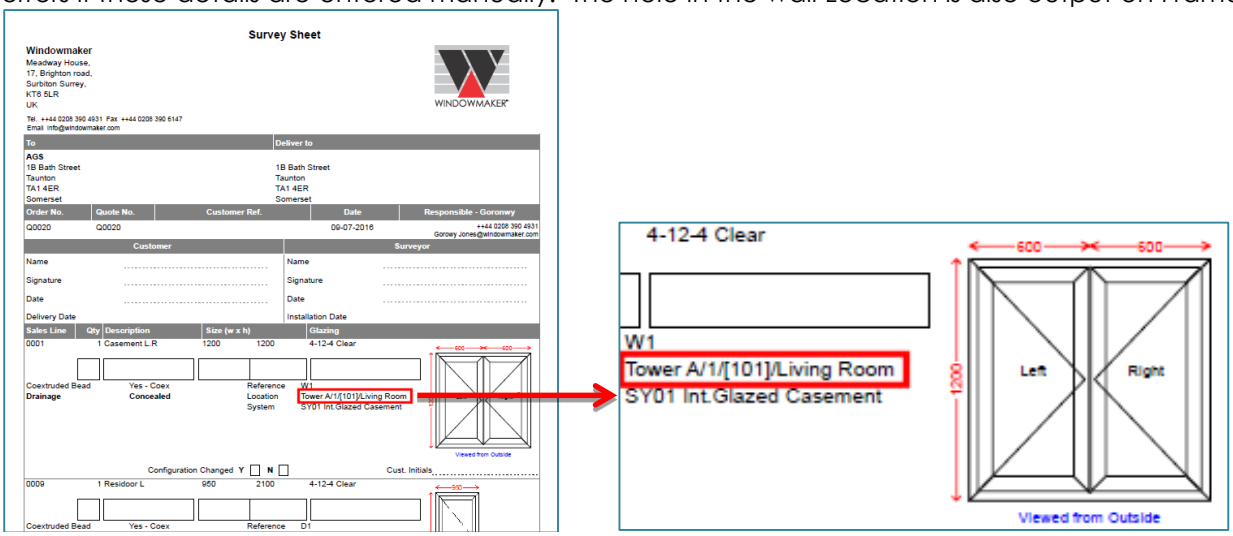


Commercial Contracts, Surveying

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

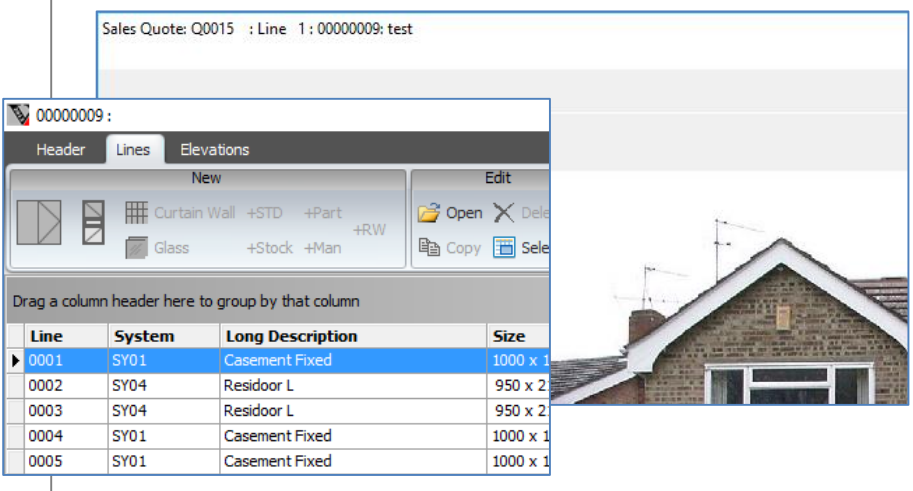


When the Phased Order is progressed to 'Under Survey' status these parameters are combined to give unique Location value for each individual hole in the wall. The Survey Sheet outputs sales lines in plot sequence, and precise location is output for each hole in the wall. This would save a lot of time 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

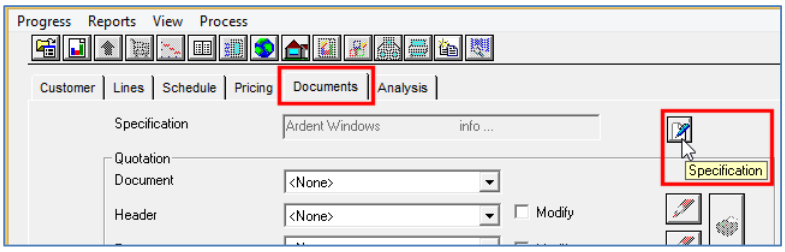
For Property Sales Lines it is now possible to view its constituents and other details.

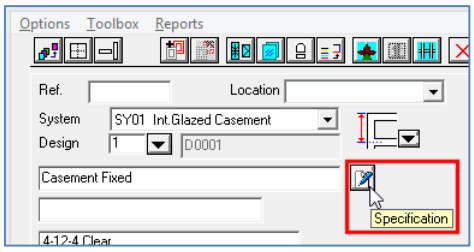


Multiline Description

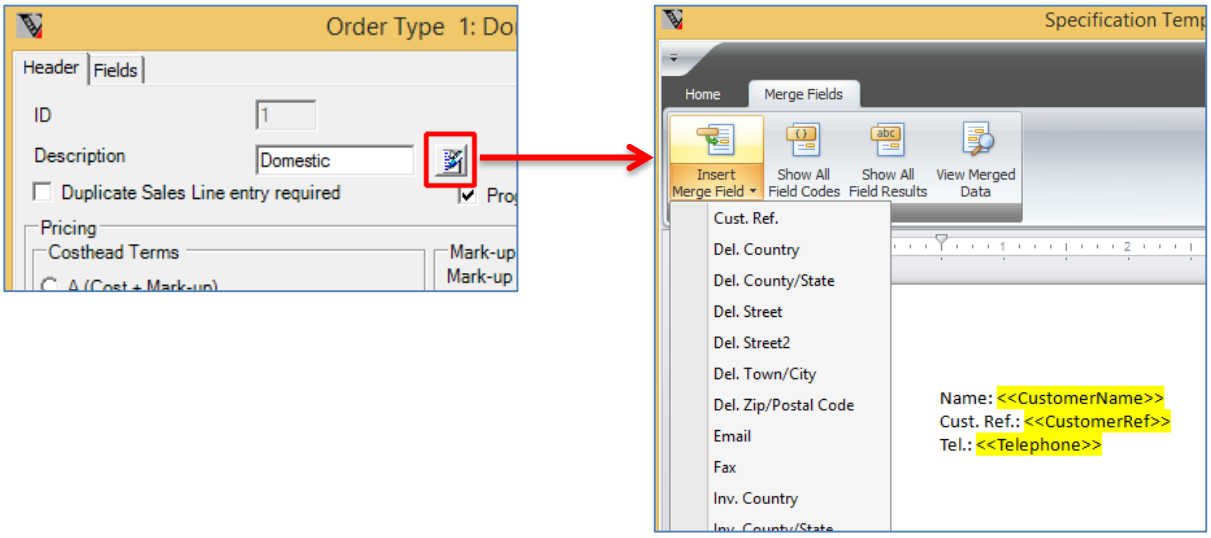
It is now possible to auto-generate multiline text for a Sales Quote/Order, using pre-defined templates. This can be set on the Order Type and can contain Sales Header details such as customer name, contact details, Invoice address, Delivery address, User Defined Fields, Weight, as well as Sales Line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





If Sales Line level fields are set, it outputs all 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".



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.

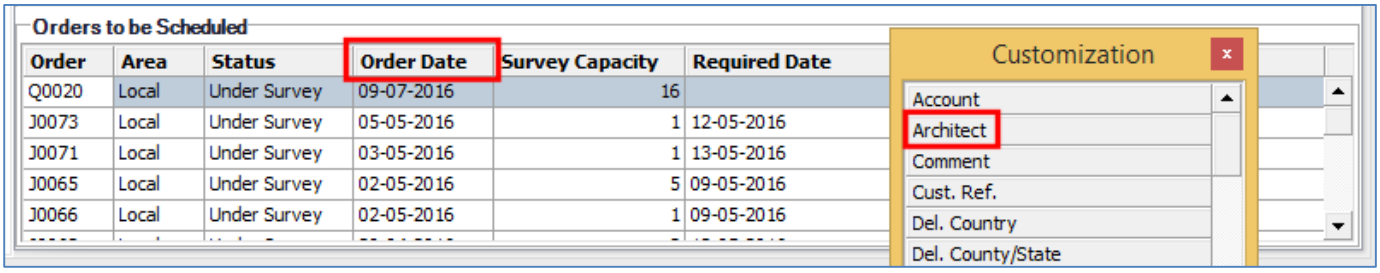
Tracking records are now generated up to 'Despatched' status, instead of up to 'In Despatch'. This means you can now track e.g. whether frames are loaded on the truck or not.

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.

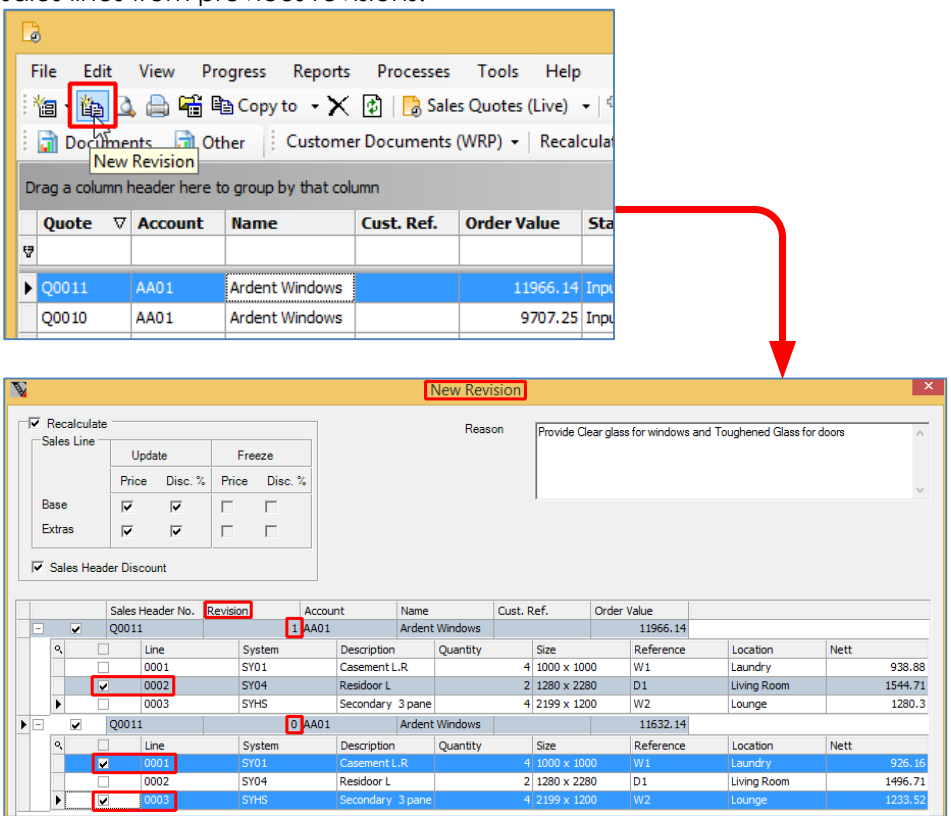


New Options

Revisions

The program now allows maintaining revisions for Sales Quotes.

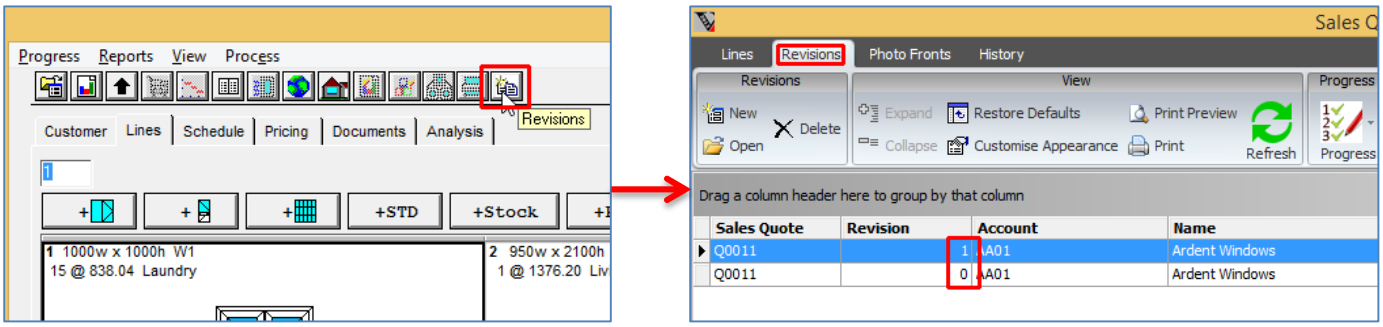
If there are any changes required to a Sales Quote you can create a new revision, instead of changing it directly. It is possible to create a new revision from any of the previous revisions or by selecting appropriate sales lines from previous revisions.



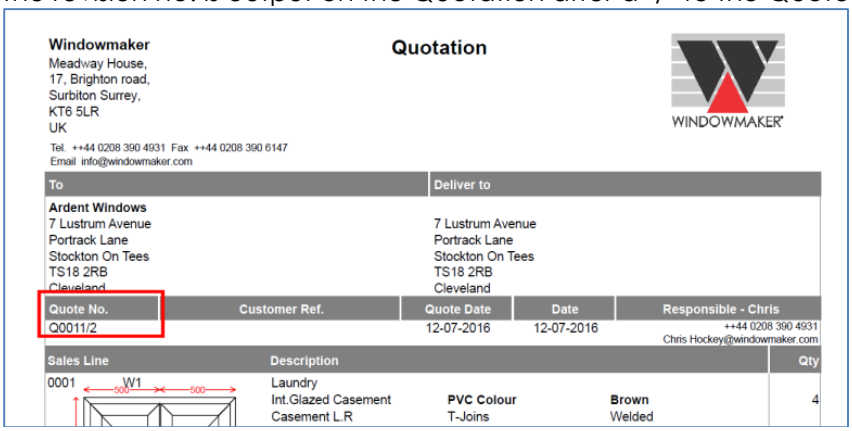
Previous revisions are read-only.

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:



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



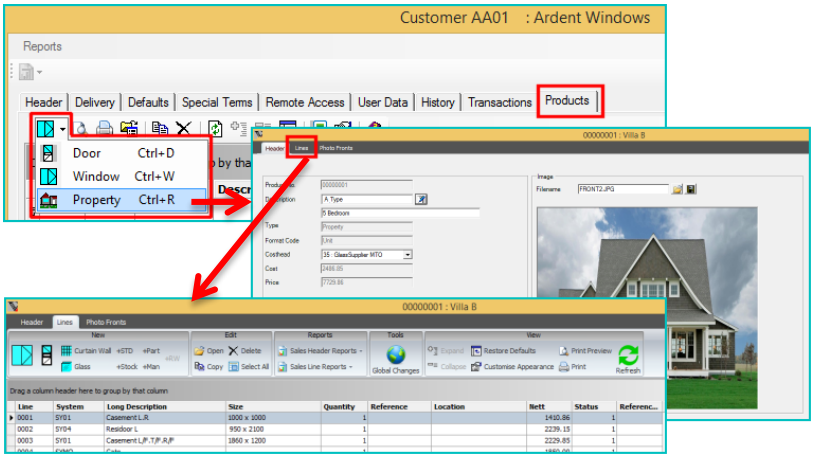
The latest or any of the previous revision can be accepted and converted to an Order. There is an option to delete all previous revisions.

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

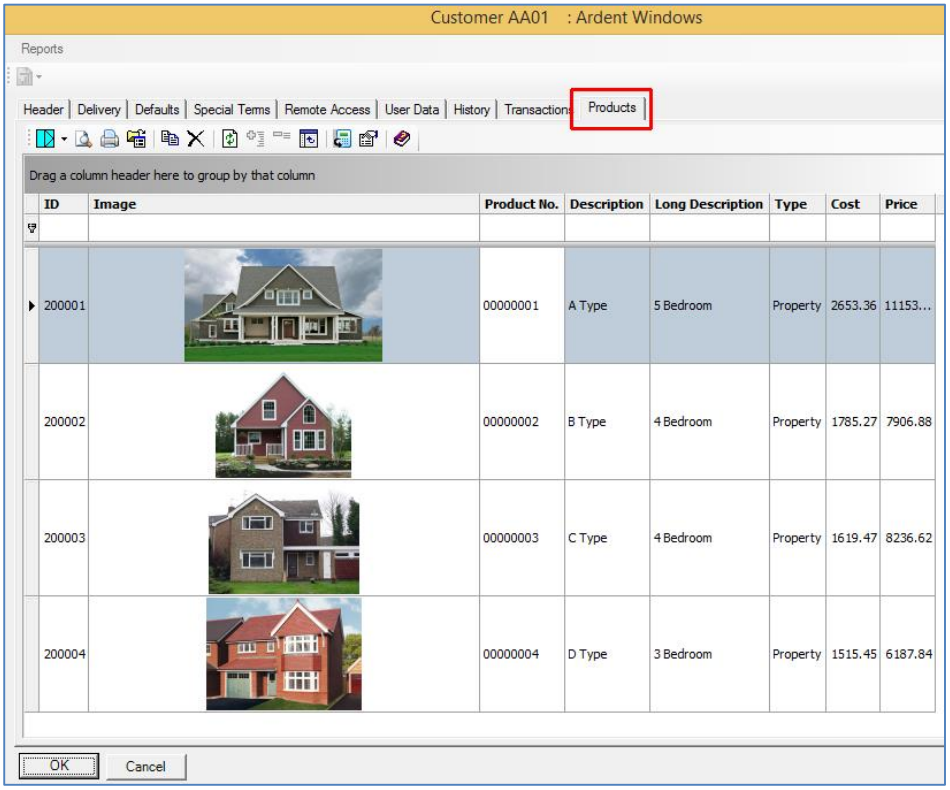
Property Types

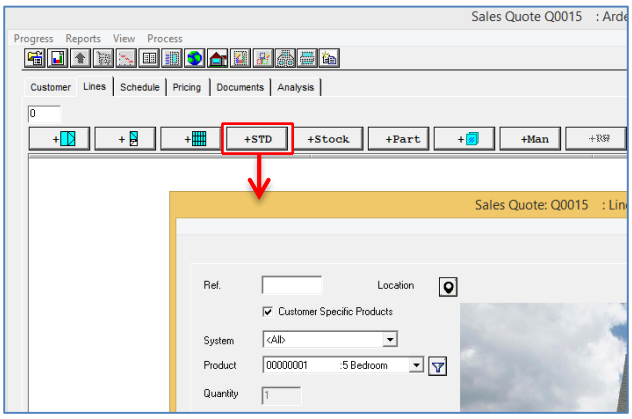
It is now possible to create Property type Products. A Property is a kit type of product which constitutes window and door products. Sales Lines for Property products can be added to a Phased Quote, similar to adding one for a standard product.

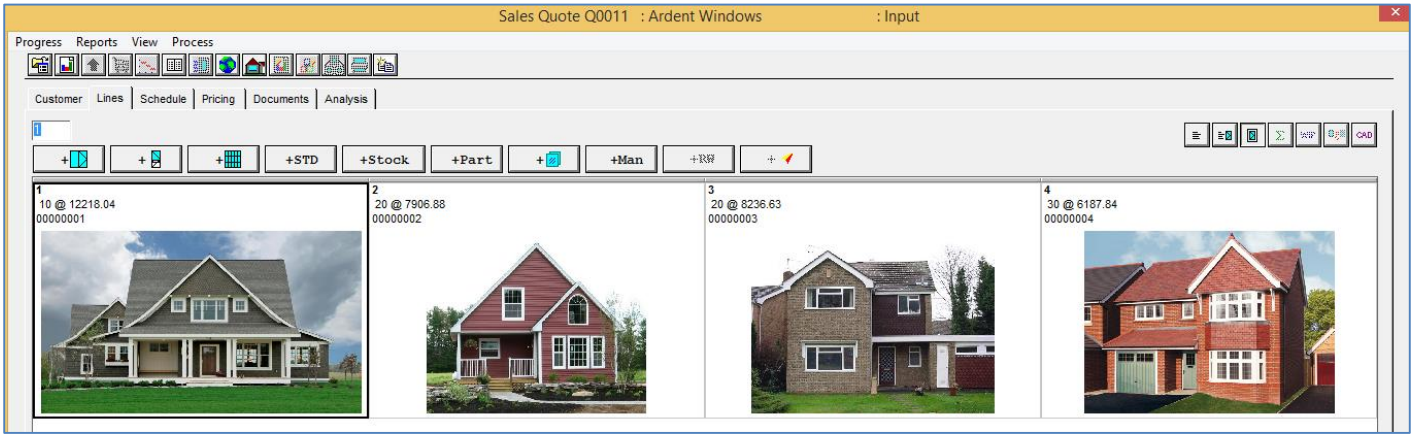


Benefits

- 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







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

Quotation

WINDOWMAKER

To	Deliver to
AGS 1B Bath Street Taunton TA1 4ER Somerset	1B Bath Street Taunton TA1 4ER Somerset

Quote No.	Customer Ref.	Quote Date	Date	Responsible - Goronwy
Q0029		13-07-2016	13-07-2016	++44 0208 390 4931 Gorowy Jones@windowmaker.com

Sales Line	Details	Qty	Rate	Amount
0001	00000005 5 Bed room	10	10244.24	102442.40
	Pricing - Extras Installation	90	345.00	31050.00
0002	00000006 4 Bed room	20	9712.09	194241.80
	Pricing - Extras Installation	260	345.00	89700.00
0003	00000007 4 Bed room	20	11839.46	236789.20
	Pricing - Extras Installation	200	345.00	69000.00
0004	00000008 3 Bed room	30	8244.29	247328.70
	Pricing - Extras Installation	240	345.00	82800.00

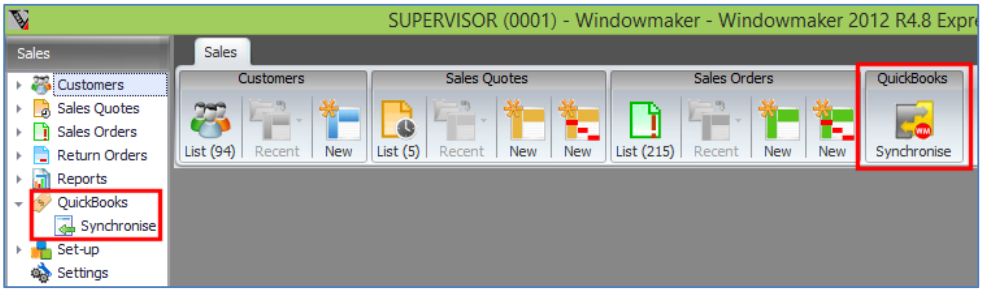
Total		£	1053352.10
Standard	17.50 %	£	184336.62
Grand Total		£	1237688.72

1

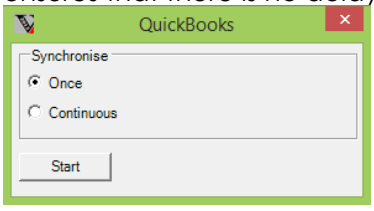
Link to QuickBooks

Windowmaker now integrates seamlessly with QuickBooks (desktop version).

Data	Sync direction	Remarks
Customers	Windowmaker ← → QuickBooks	Create customers in either system and avoid duplicate entry in the other.
Sales Transactions (Invoice, Deposit and Credit Notes)	Windowmaker → QuickBooks	Automatically post the sales transactions into QuickBooks from Windowmaker to 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.



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.

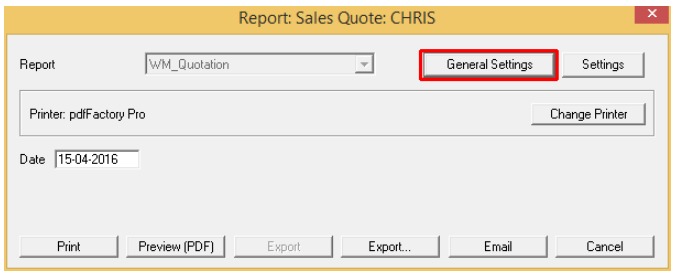
Designs

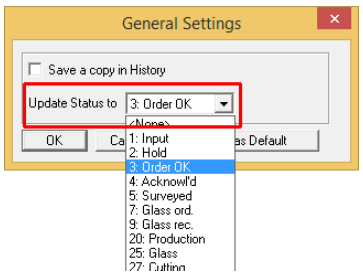
Designs are now migrated to Windowmaker database and stored in the WMProduct table instead of DAT file. This is part of the drive to abolish any flat file storage and take advantage of the relational database system. Please see Release Notes for full details.

Migration offers additional flexibility to:
- 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.

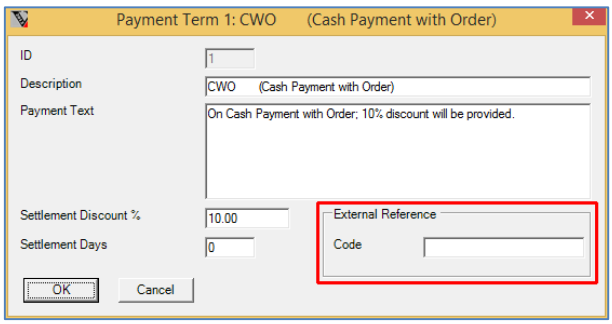


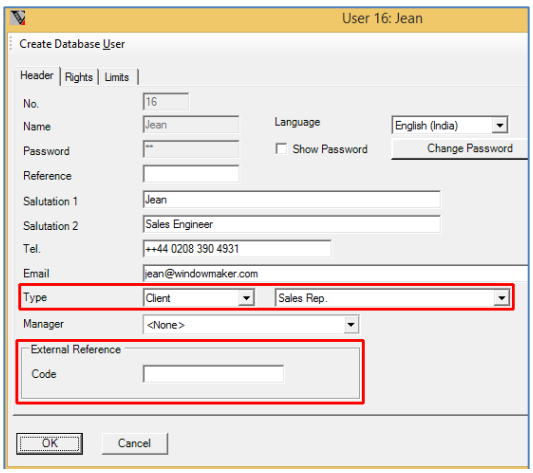


Payment Terms, Users

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.





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

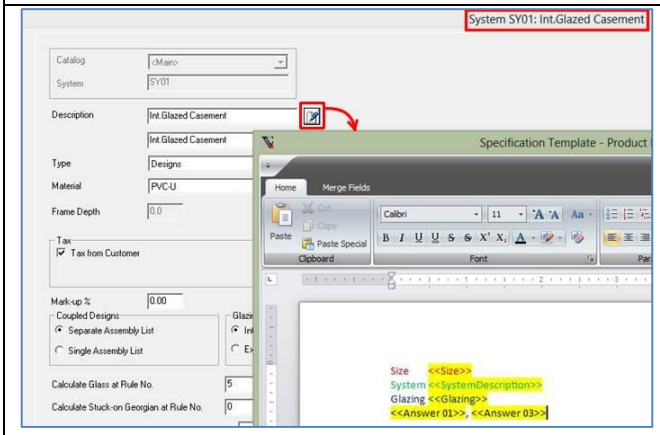
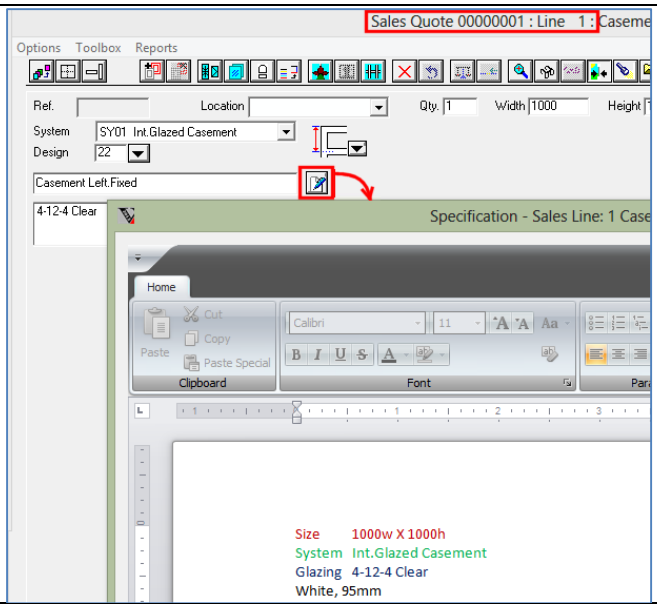
Entrance Doors

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

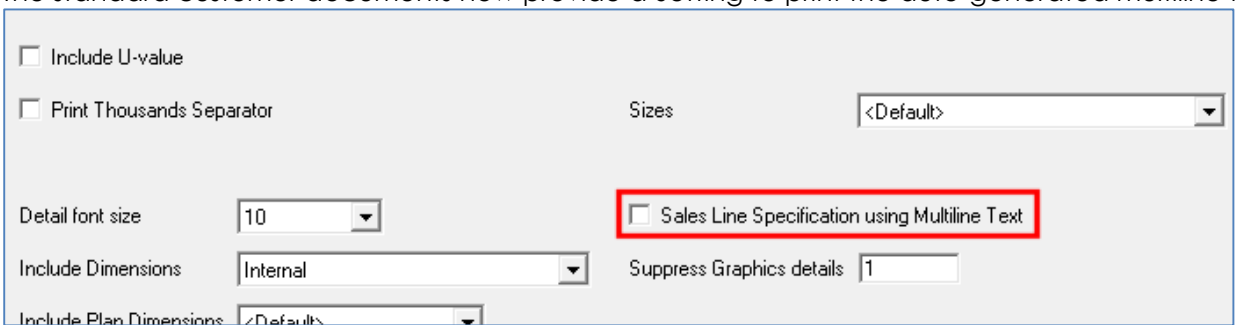
Multiline Description

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.

Multiline text template with Merge Fields	Multiline text generated in Sales Line with merged values
	

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

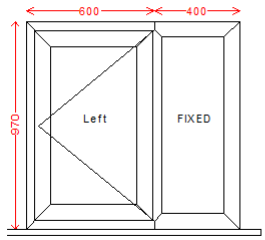
The standard customer documents now provide a Setting to print the auto-generated multiline text.



Default Output	Using auto-generated Multiline text

Sales Line

0001



Viewed from Outside

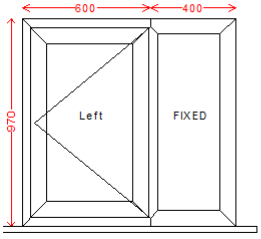
Details

Int.Glazed Casement
Casement Left.Fixed
1000w x 1000h
4-12-4 Clear

PVC Colour	White
T-Joins	Welded
Cill	**95mm**
Cill horns	100
Outer Frame	72mm
Transom/Mullion	70mm
T-Sash (C'mnt)	75mm

Sales Line

0001



Viewed from Outside

Details

Size 1000w X 1000h
System Int.Glazed Casement
Glazing 4-12-4 Clear
White, 95mm

Pricing - Extras
Locking Handle

Windowmaker 2012 R4.6

General Enhancements

SQL Server 2014 & 2012

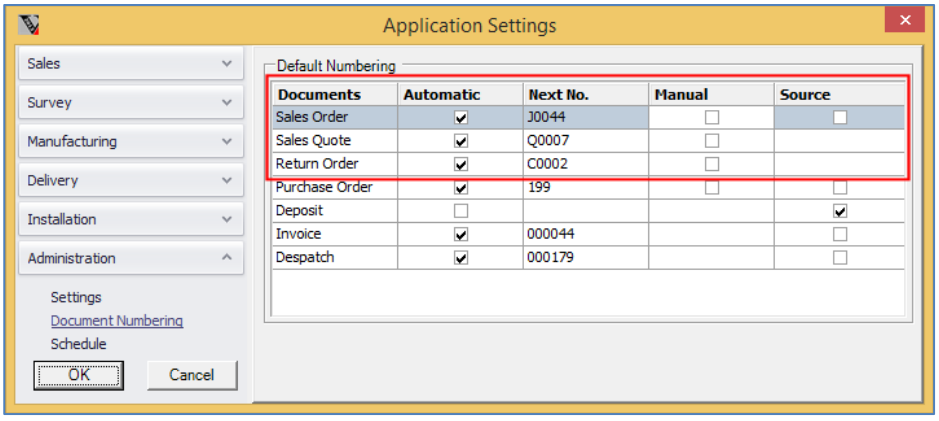
It is now possible to synchronize Sales Client database using SQL Server 2012 & 2014. Earlier this was possible only with SQL Server 2008/2008 R2.

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

SQL version	Windowmaker Express, Windowmaker Lite, and Windowseller		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 → Administration → Document Numbering.



Crystal Reports/Quotation

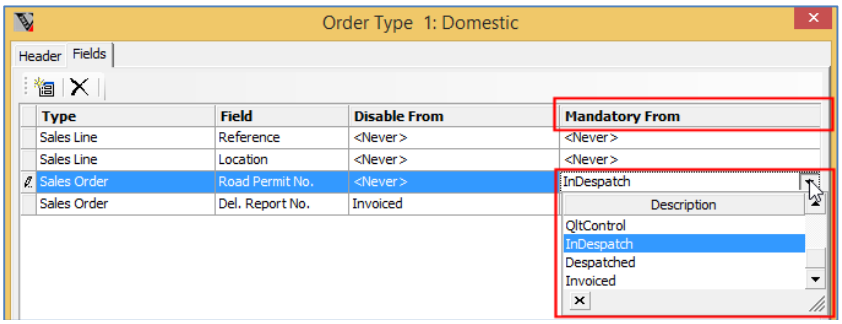
Windowmaker Quotation now also includes System for each Sales Line.

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.



Enhancements to Options

Entrance Doors

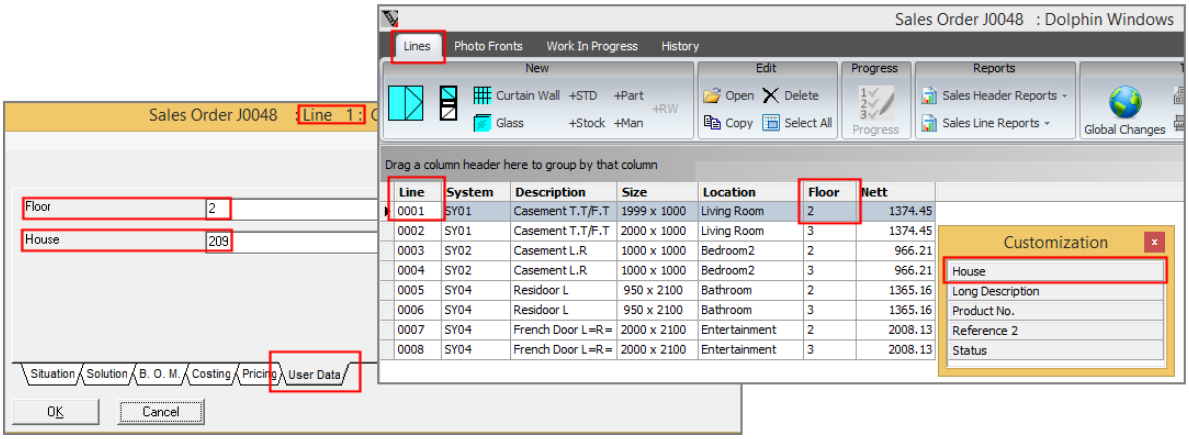
Program now allows using any Door Style and Door Slab as a Sidelite.

Commercial Contracts

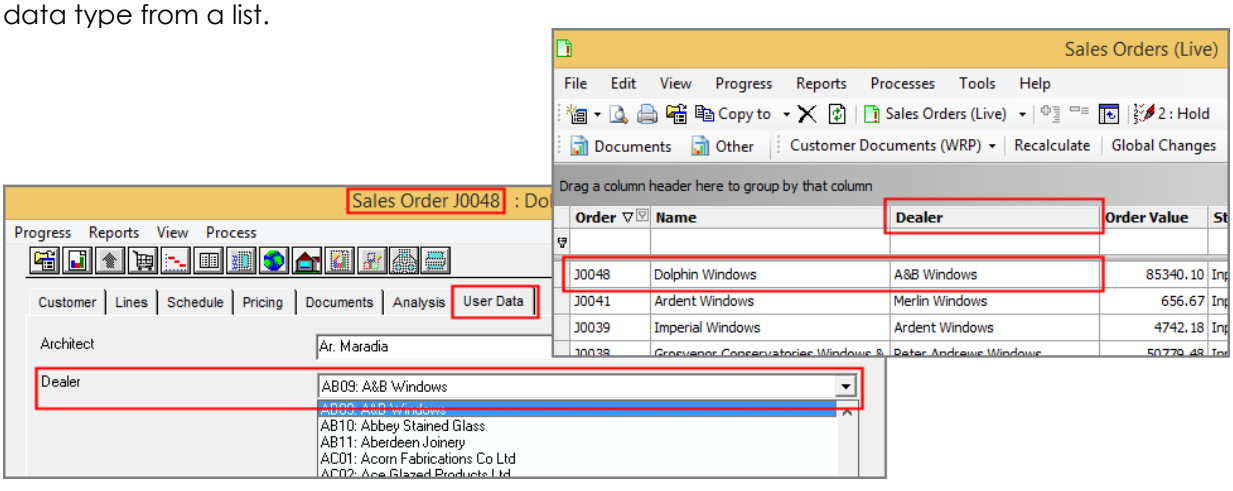
Users with Status Update right can now update the status of Phased Orders. However, only Senior Managers are allowed to change status of Phased Orders once Phases have been created.

User Data

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



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.



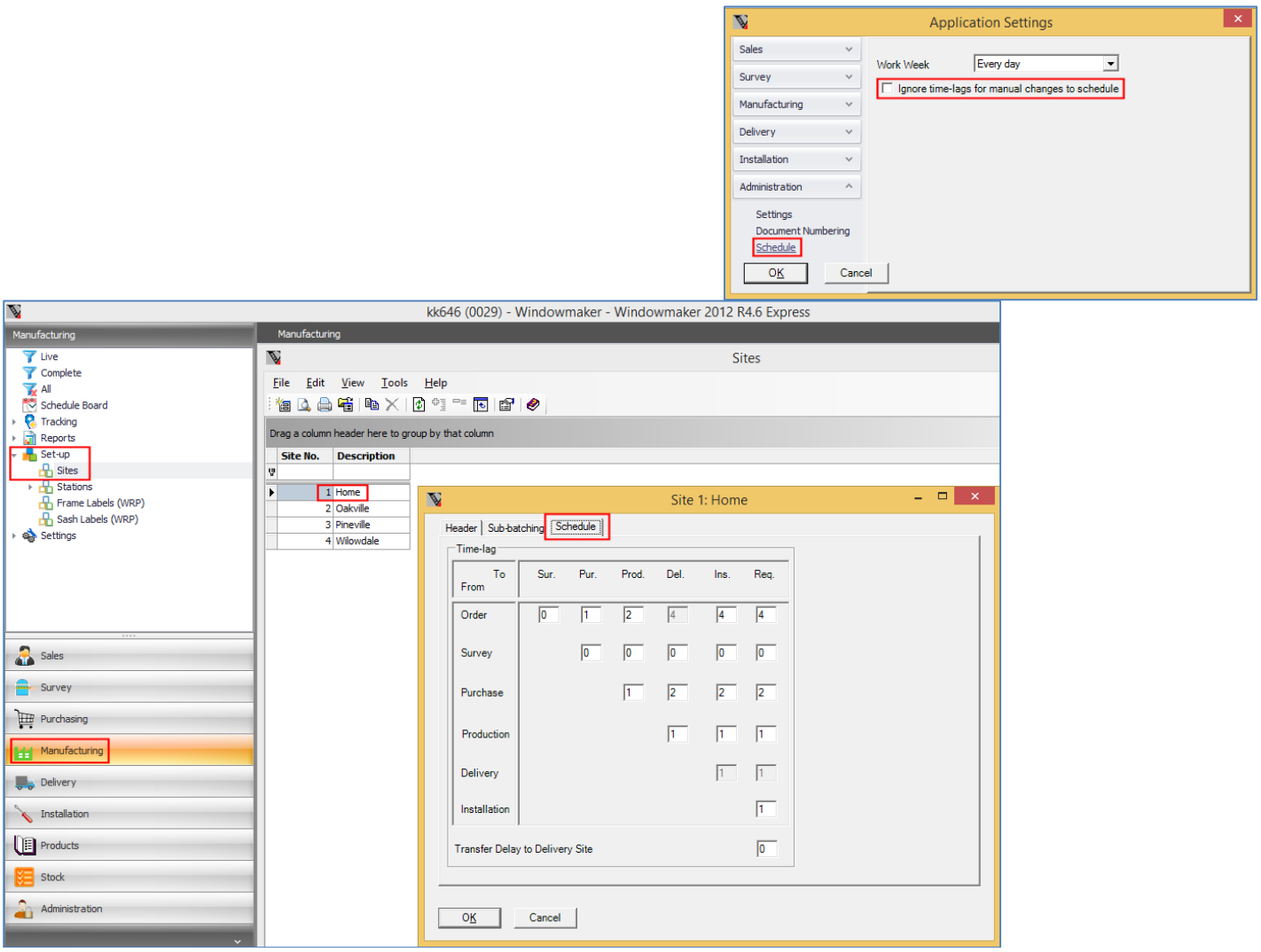
Production/Delivery/Purchase Scheduling

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.

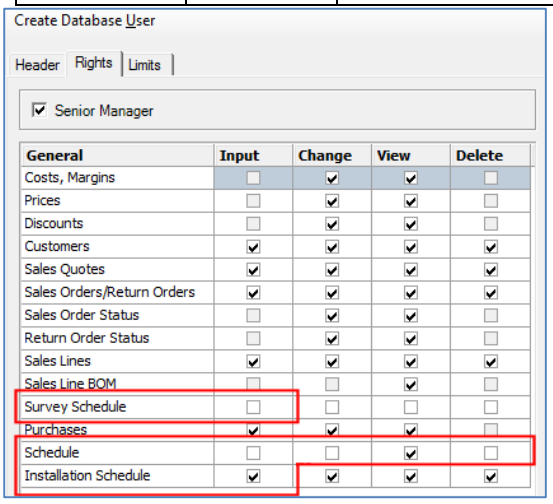
Multiple Sites
The program now allows to setup Purchase, Production and Delivery time-lags specific to each site.


Application Settings
Sales
Survey
Manufacturing
Delivery
Installation
Administration
Settings
Document Numbering
Schedule
Work Week
Every day
Ignore time-lags for manual changes to schedule
OK
Cancel
kk646 (0029) - Windowmaker - Windowmaker 2012 R4.6 Express
Manufacturing
Live
Complete
All
Schedule Board
Tracking
Reports
Set-up
Sites
Stations
Frame Labels (WRP)
Sash Labels (WRP)
Settings
Sales
Survey
Purchasing
Manufacturing
Delivery
Installation
Products
Stock
Administration
Sites
File Edit View Tools Help
Drag a column header here to group by that column
Site No. Description
1 Home
2 Oakville
3 Pineville
4 Willowdale
Site 1: Home
Header Sub-batching Schedule
Time-lag
From \ To Sur. Pur. Prod. Del. Ins. Req.
Order 0 1 2 4 4 4
Survey 0 0 0 0 0
Purchase 1 2 2 2
Production 1 1 1
Delivery 1 1
Installation 1
Transfer Delay to Delivery Site 0
OK
Cancel

Scheduling: User Rights

Following user rights are introduced:

User Right		Allows the user to …	Remarks
Schedule	Input	Schedule an Order not yet scheduled	These rights affect Purchase, Production and Delivery scheduling activities. These were earlier controlled by Sales Order rights.
	Change	Manually change schedule of Sales Orders	
	View	View the schedule details on the Schedule Boards	
	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.



Link to Saw

Windowmaker can now link to Smart Fab Saw.

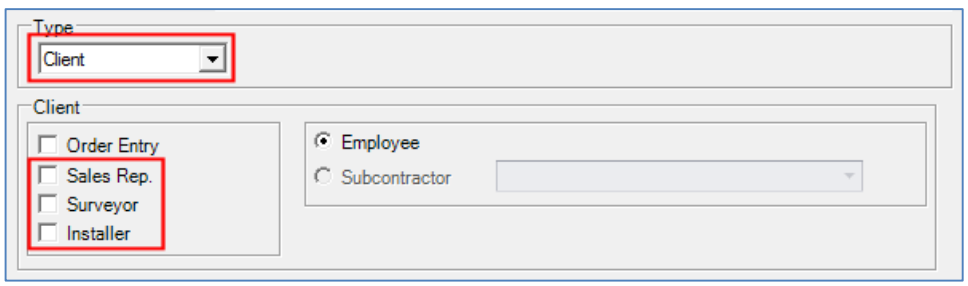
Link to Glass Cutting Table

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.



Windowmaker 2012 R4.4/R4.5

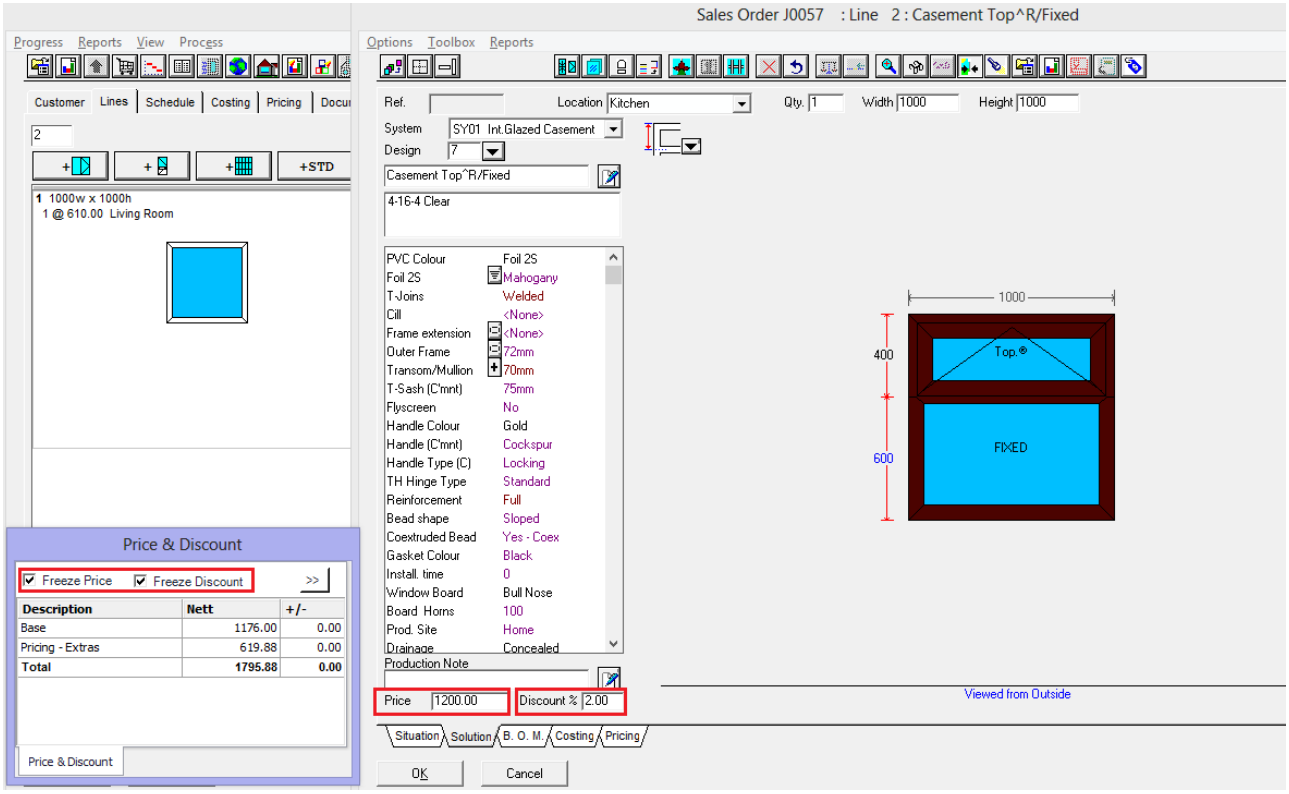
General Enhancements

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.

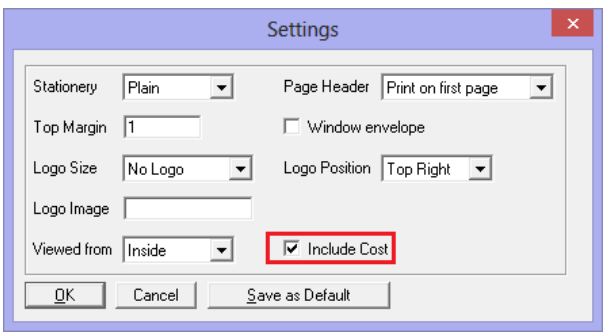


Copying Sales Orders to Quotes

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).

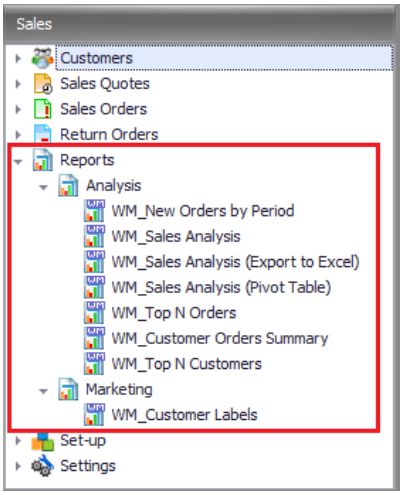
Purchase Order

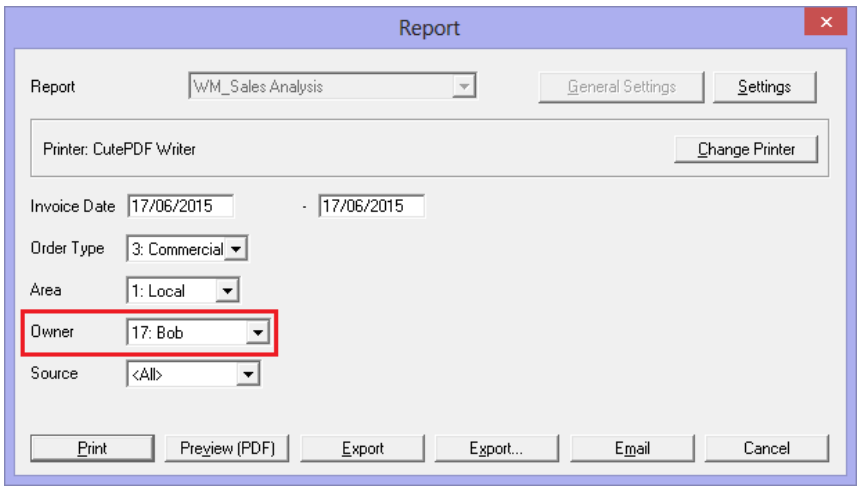
You can now optionally include costs in the Purchase Order. This could be useful to review the Purchase Order internally before placing the order with the supplier.



Analysis and Marketing reports

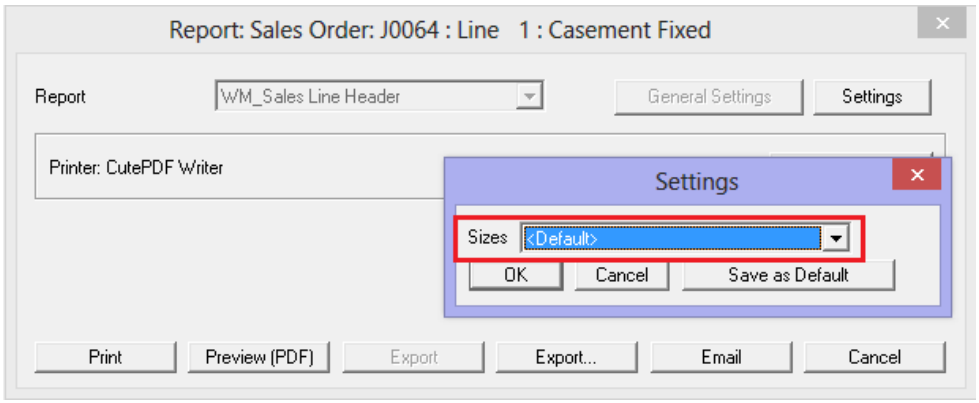
All Analysis and Marketing reports can now be generated for a specific Owner i.e. sales person.





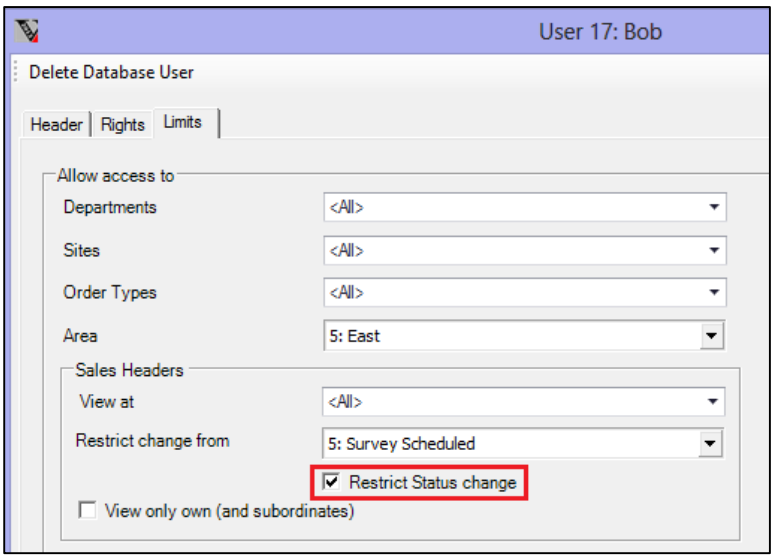
Sales Line Header report

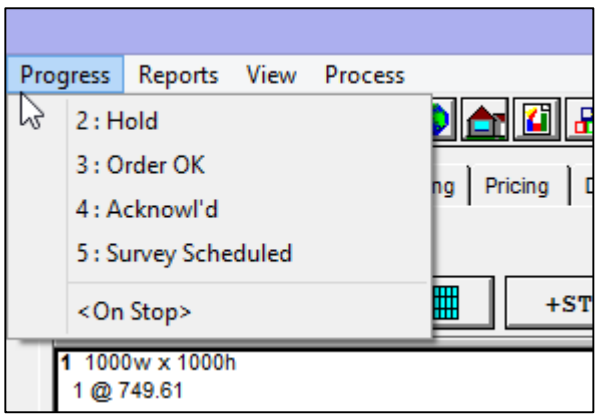
Sizes format can now be selected for the Sales Line Header report.



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.

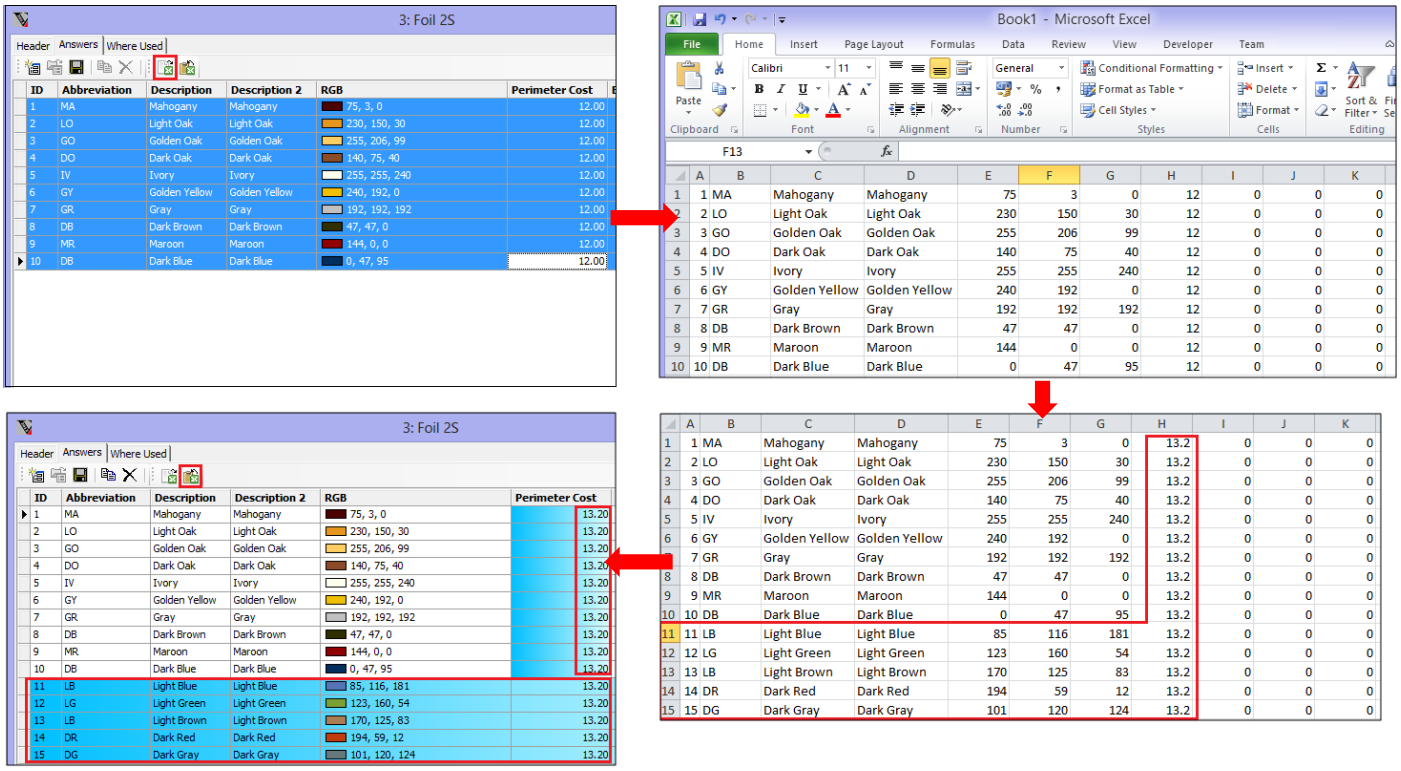




Easier Answers set-up

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.

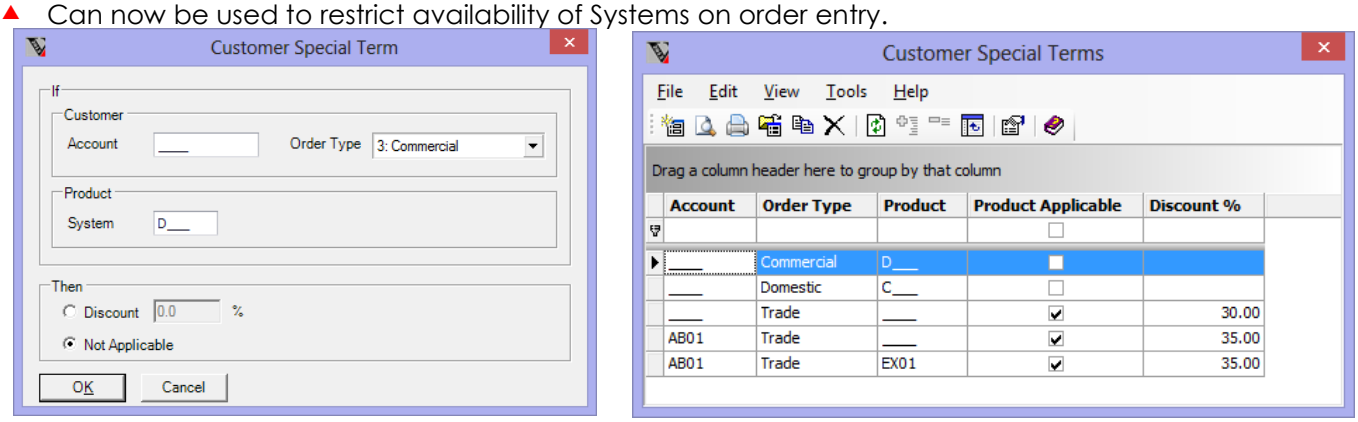
This can be very useful to update costs for finish option answers or add new answers.



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.

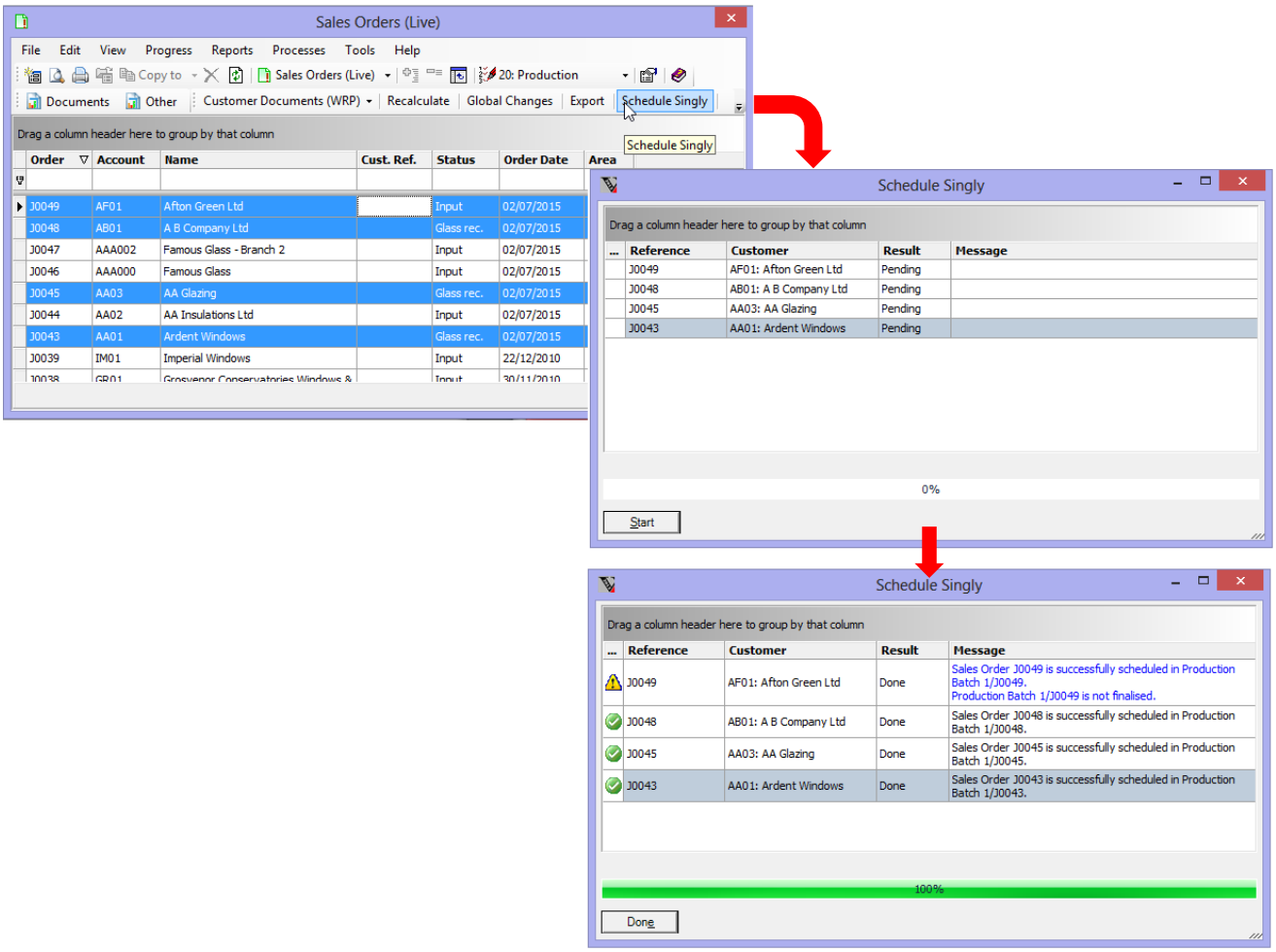


Refer 'Special Terms' topic in the help file for details.

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'.



Installation Scheduling

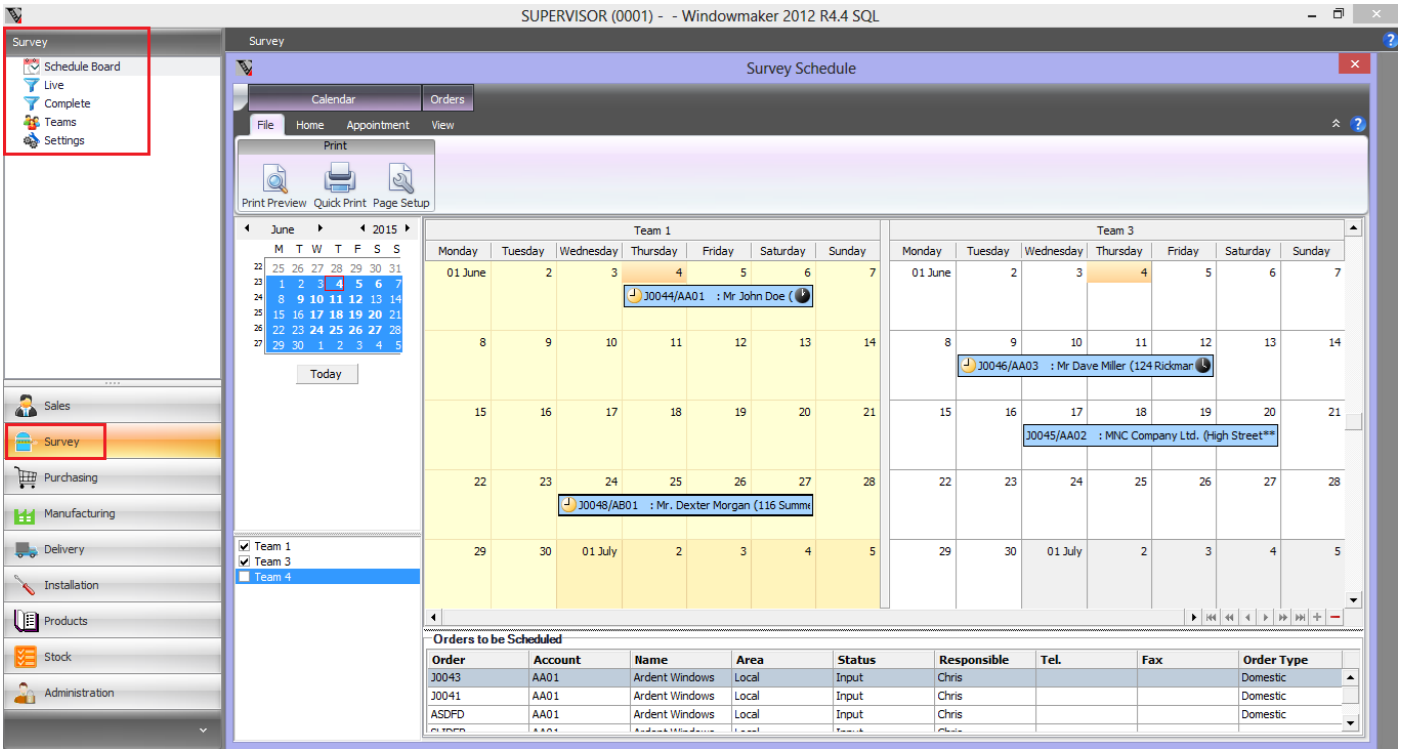
Includes Survey Scheduling

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.

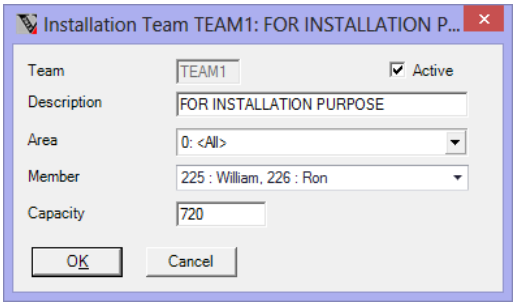


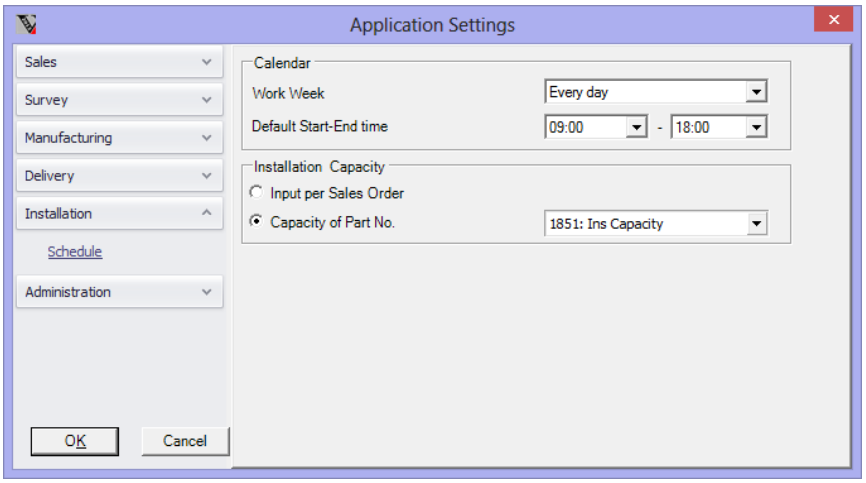
Installation Teams

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.

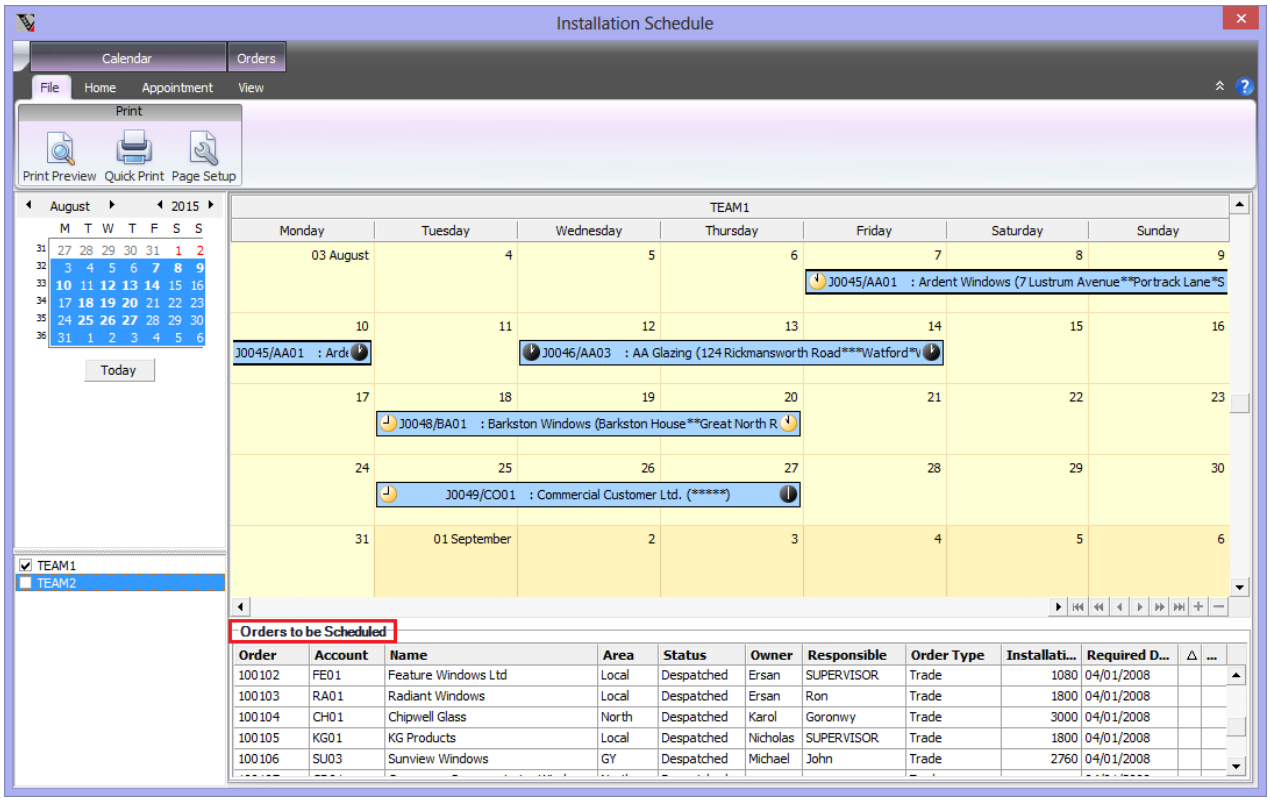


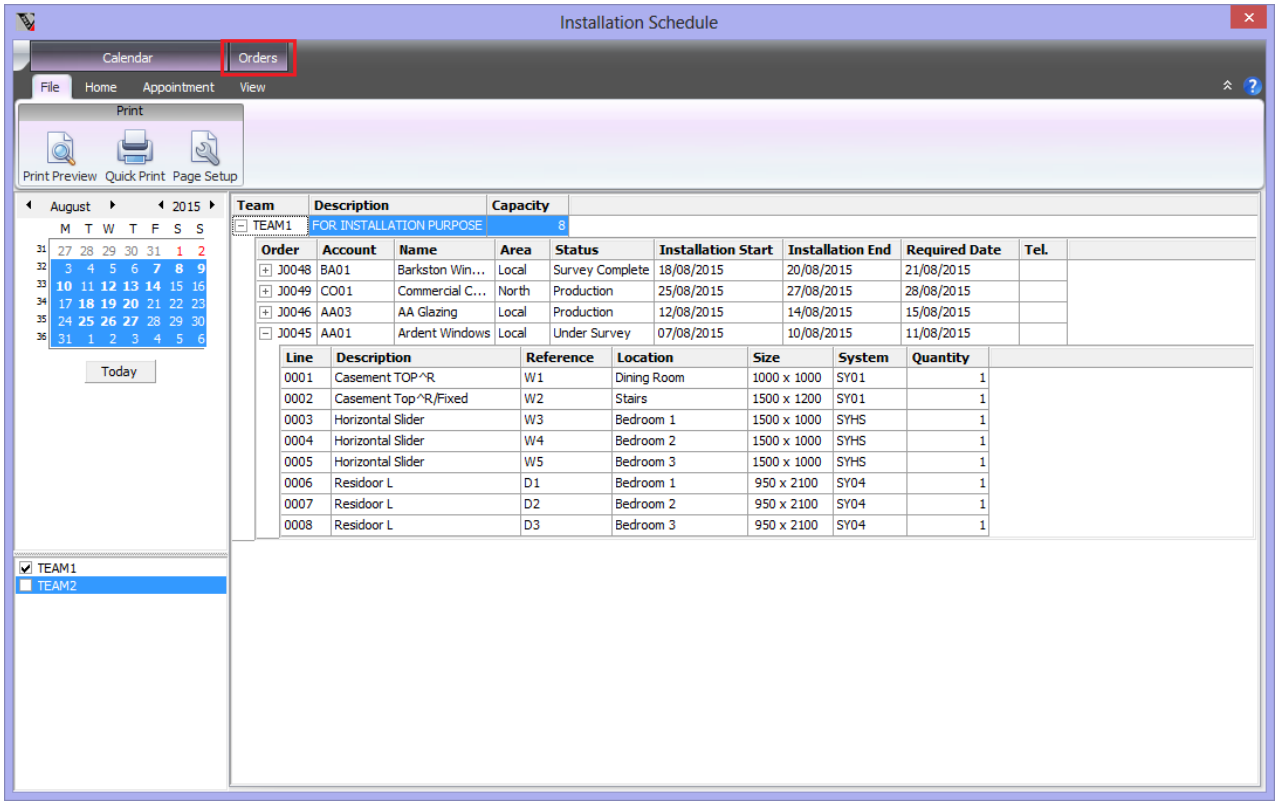


Installation Schedule Board

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.

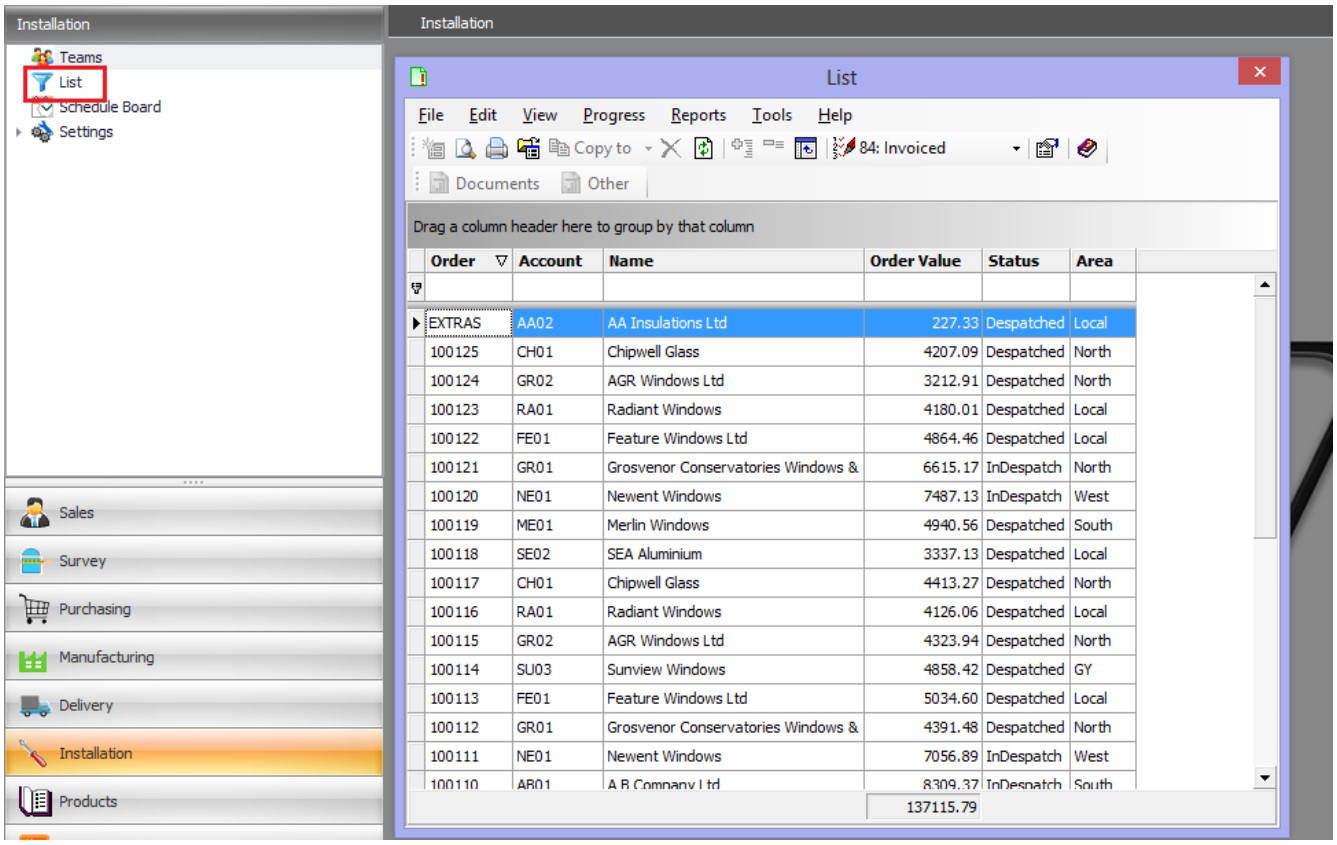




Installation department

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

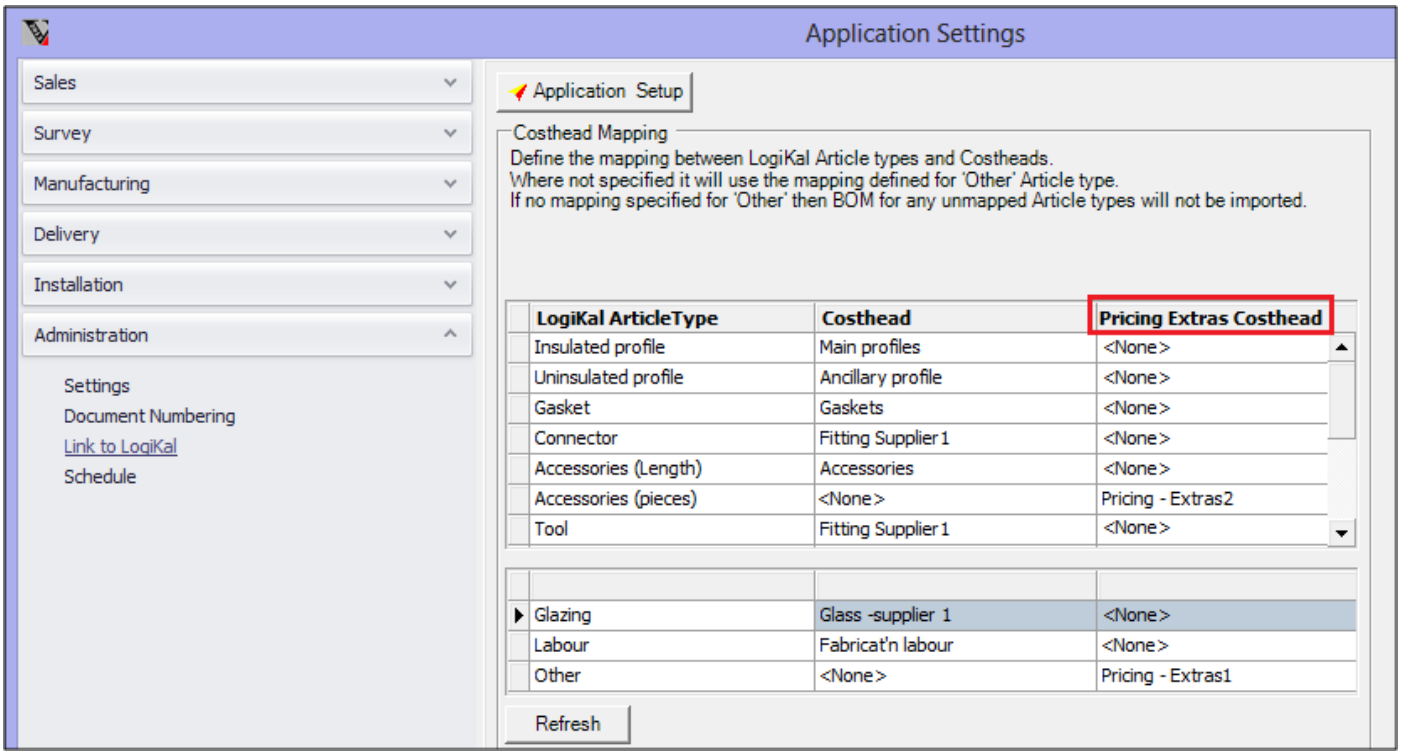
- View all the Sales Orders whose Status is >= In Despatch i.e. ready for installation.
- Update status of such Sales Orders.
- Run installation reports.


Installation
Teams
List
Schedule Board
Settings
Sales
Survey
Purchasing
Manufacturing
Delivery
Installation
Products
Installation
List
File Edit View Progress Reports Tools Help
Copy to
84: Invoiced
Documents
Other
Drag a column header here to group by that column
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
100119 ME01 Merlin Windows 4940.56 Despatched South
100118 SE02 SEA Aluminium 3337.13 Despatched Local
100117 CH01 Chipwell Glass 4413.27 Despatched North
100116 RA01 Radiant Windows 4126.06 Despatched Local
100115 GR02 AGR Windows Ltd 4323.94 Despatched North
100114 SU03 Sunview Windows 4858.42 Despatched GY
100113 FE01 Feature Windows Ltd 5034.60 Despatched Local
100112 GR01 Grosvenor Conservatories Windows & 4391.48 Despatched North
100111 NE01 Newent Windows 7056.89 InDespatch West
100110 AB01 A B Company Ltd 8309.37 InDespatch South
137115.79

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.



Windowmaker Quotation

Quote No.	Customer Ref.	Quote Date	Date
Q0021		27-07-2015	27-07-2015

Sales Line	Details	Qty	Rate	Amount
0001	Description Window Element Schüco AWS 105 CC.HI gasket system 1;A 1000w x 1000h 2x6mm 6+6 Clear	1	562.96	562.96
	Pricing - Extras			
	Alum.Brite Kote 180 1000	1	7.66	7.66
	Cover kit 2100 mm	1	127.62	127.62
	Pres.Plate pun 140mm	1	13.41	13.41
	Pricing - Extras Subtotal			148.69

Total		£	711.65
VAT	20.00 %	£	142.33
Grand Total		£	853.98

Position	Quantity	Description	Price [£]	Total [£]
001	1 Pcs		711.65	711.65
	Interior View	**Window Element 1000 mm x 1000 mm**, Consisting of a Fixed Sash and a Bottom Hung Window. System: Schüco AWS 105 CC.HI, gasket system 1 Colours: Profiles: Pre-rolled by Schüco PA-insulating bars Glazing: 2 x 2x6mm 6+6 Clear U_g=1.1 W/(m²K) Profiles: Frame: 66.5 mm Mullion/Transom: 115 mm Window Vent: 34 mm, 34 mm Window Hardware: ##WITHOUT PARTS	562.96	
		155211	127.63	
		202765	13.41	
		242100 , 1000 mm	7.66	
Grand Total Net				£ 711.65

LogiKal Quotation

New Products

Survey Client

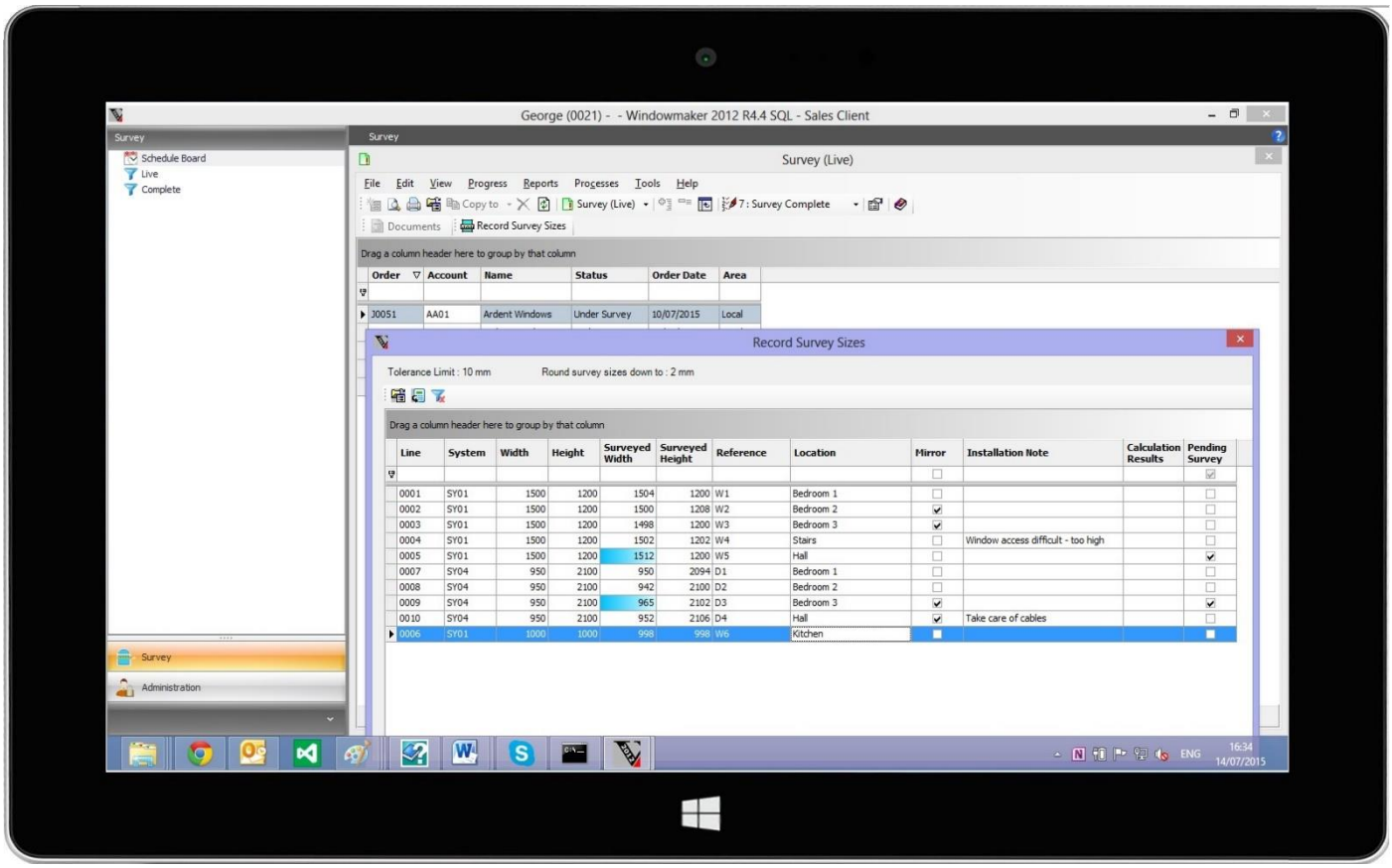
Survey Client enables Surveyors to:

- 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.



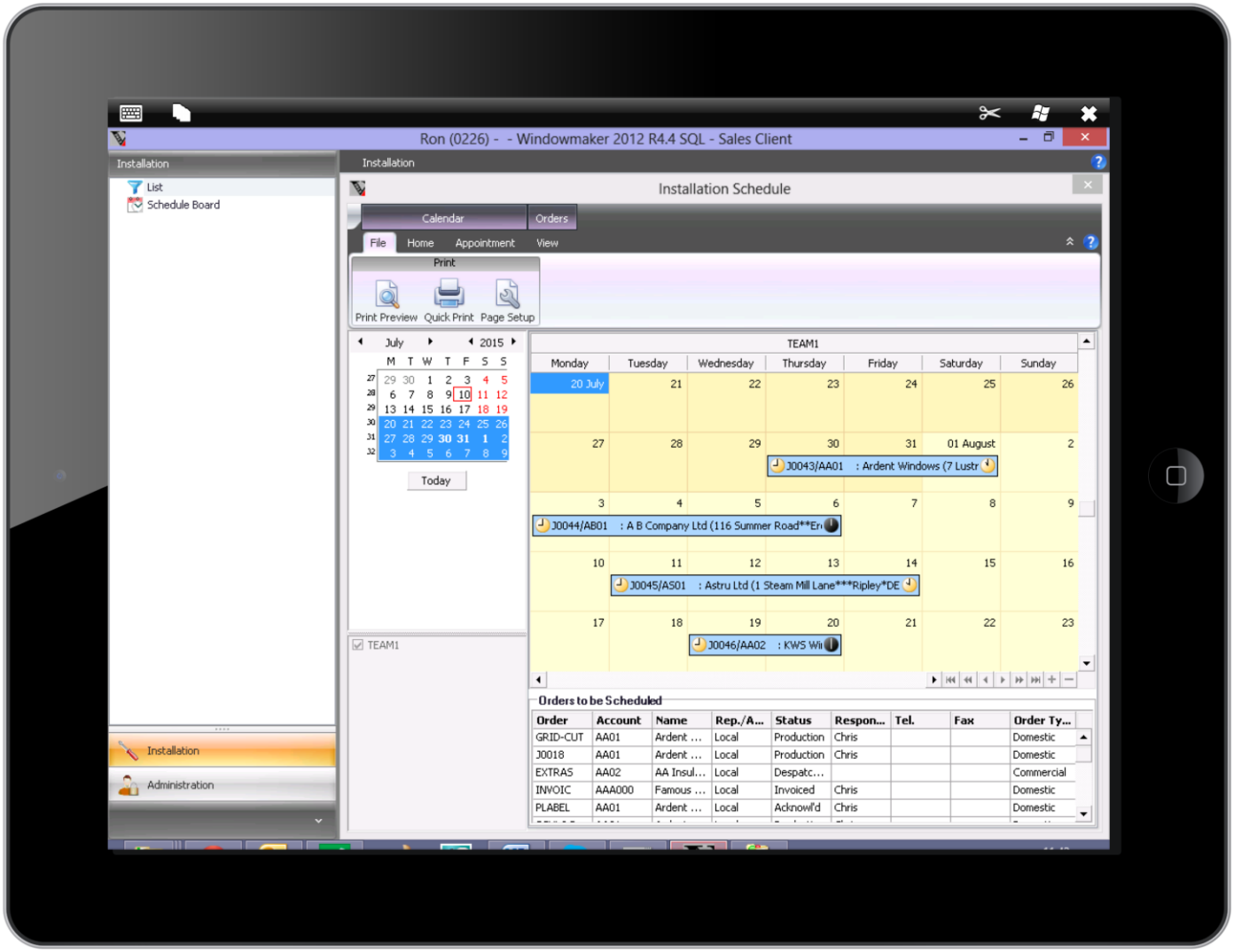
Installer Client

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).


Ron (0226) - - Windowmaker 2012 R4.4 SQL - Sales Client
Installation
List
Schedule Board
Installation
Administration
Installation
Installation Schedule
Calendar
Orders
File
Home
Appointment
View
Print
Print Preview
Quick Print
Page Setup
July
2015
Today
TEAM1
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday
20 July
01 August
J0043/AA01 : Ardent Windows (7 Lustr
J0044/AB01 : A B Company Ltd (116 Summer Road**Er
J0045/AS01 : Astru Ltd (1 Steam Mill Lane***Ripley*DE
J0046/AA02 : KWS Wi
Orders to be Scheduled
Order
Account
Name
Rep./A...
Status
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Fax
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GRID-CUT
AA01
Ardent ...
Local
Production
Chris
Domestic
J0018
AA01
Ardent ...
Local
Production
Chris
Domestic
EXTRAS
AA02
AA Insul...
Local
Despatc...
Commercial
INVOIC
AAA000
Famous ...
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Chris
Domestic
PLABEL
AA01
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Chris
Domestic

Windowmaker 2012 R4.2

General Enhancements

Support to SQL Server 2012 and 2014

Windowmaker now supports the following:

- SQL Server 2014
- SQL Server 2012

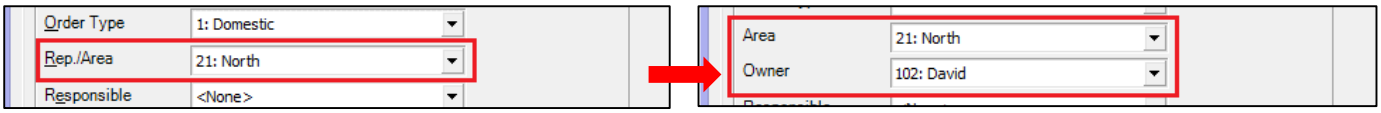
Refer table below for a summary of Windowmaker support to various SQL Server versions.
Note that Synchronization with Sales Client works only with SQL Server 2008/2008 R2.

SQL version	Windowmaker Express, Windowmaker Lite, and Windowseller		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	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

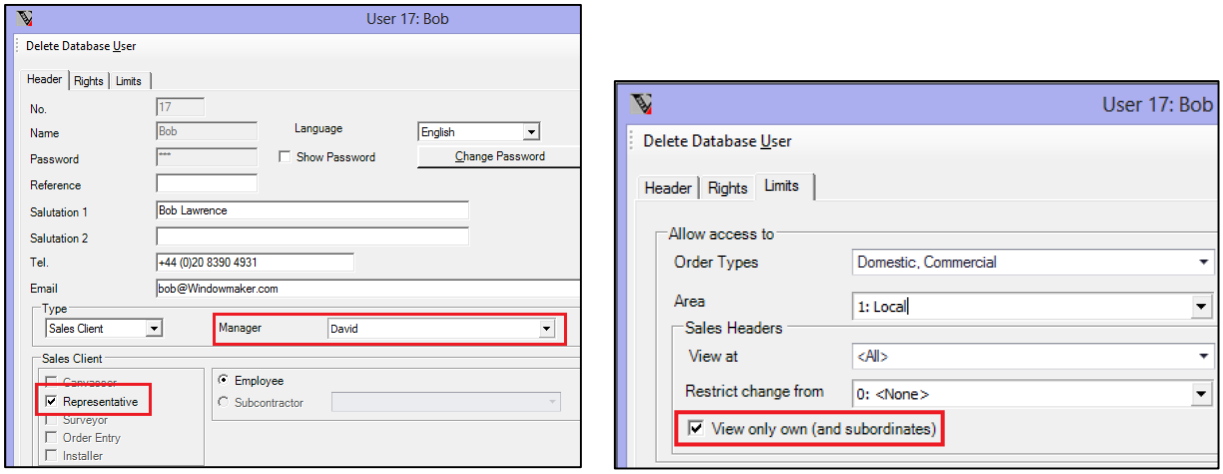
- Rep./Area is renamed to Area.
- Reps can be set-up as Windowmaker Users of type 'Normal' or 'Sales Client – Representative'. A Rep can be selected as an Owner on Customer and Sales Header records.



Restricting access to Sales Headers and Customers

It is now possible to

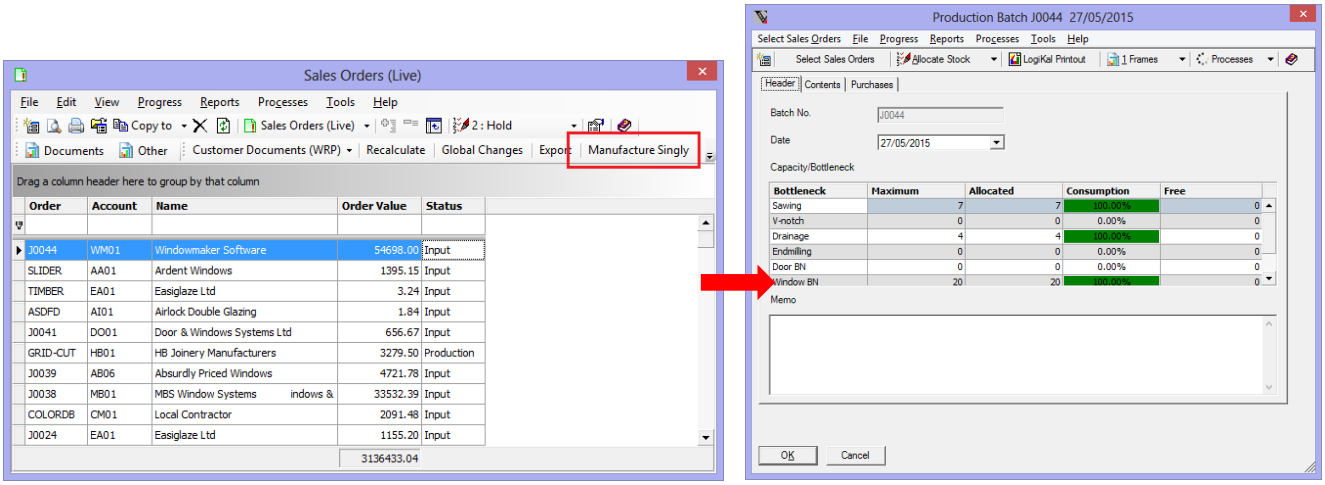
- Restrict Sales Representatives to access only Customers and Sales Headers owned by them.
- Assign Manager for Sales Representatives. Managers can access Customer and Sales Headers owned by them or their subordinates.



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.

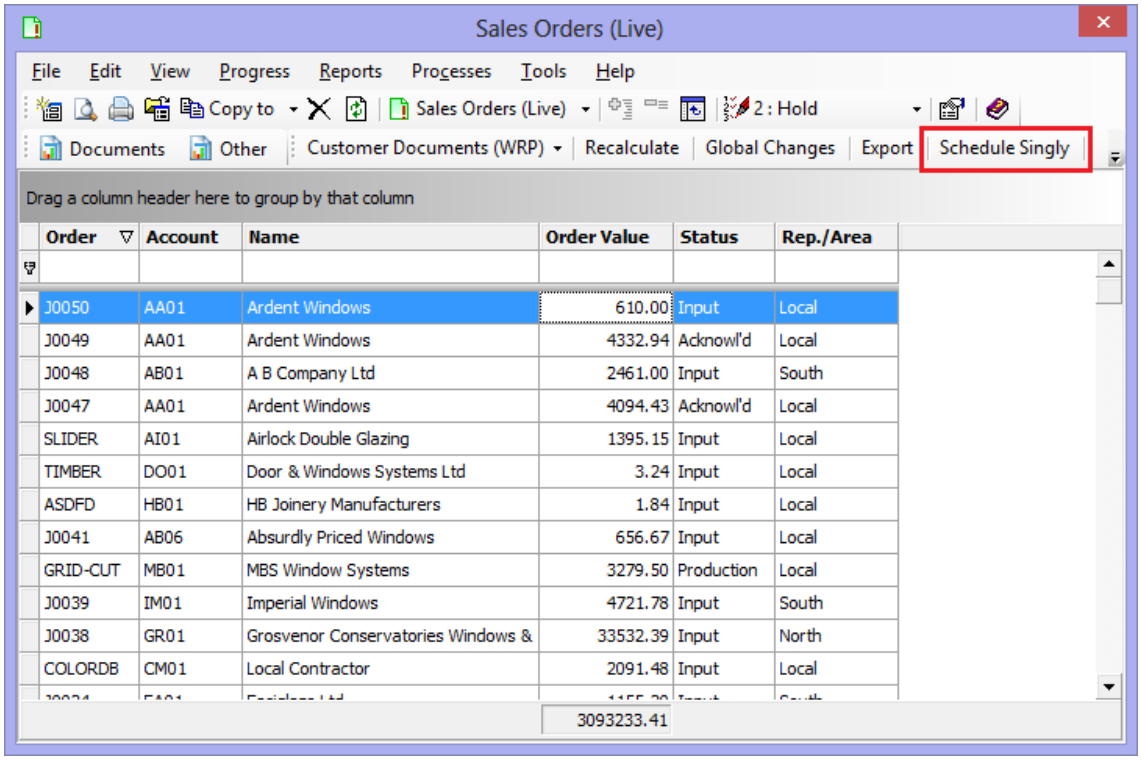


Refer "How to release Single Sales Orders for manufacturing" topic in the help file for details.

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.



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.

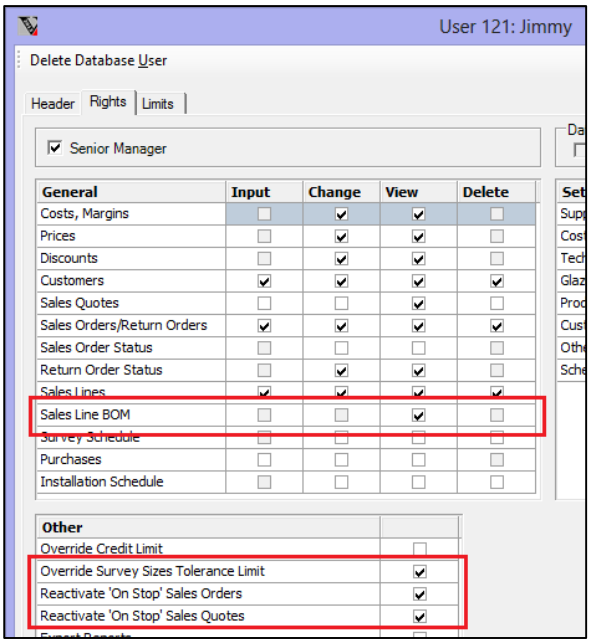
Windowmaker 2012 R4.1

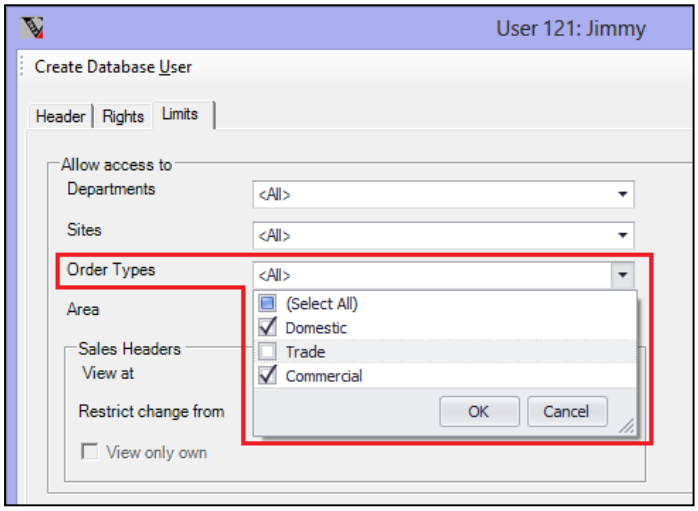
General Enhancements

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



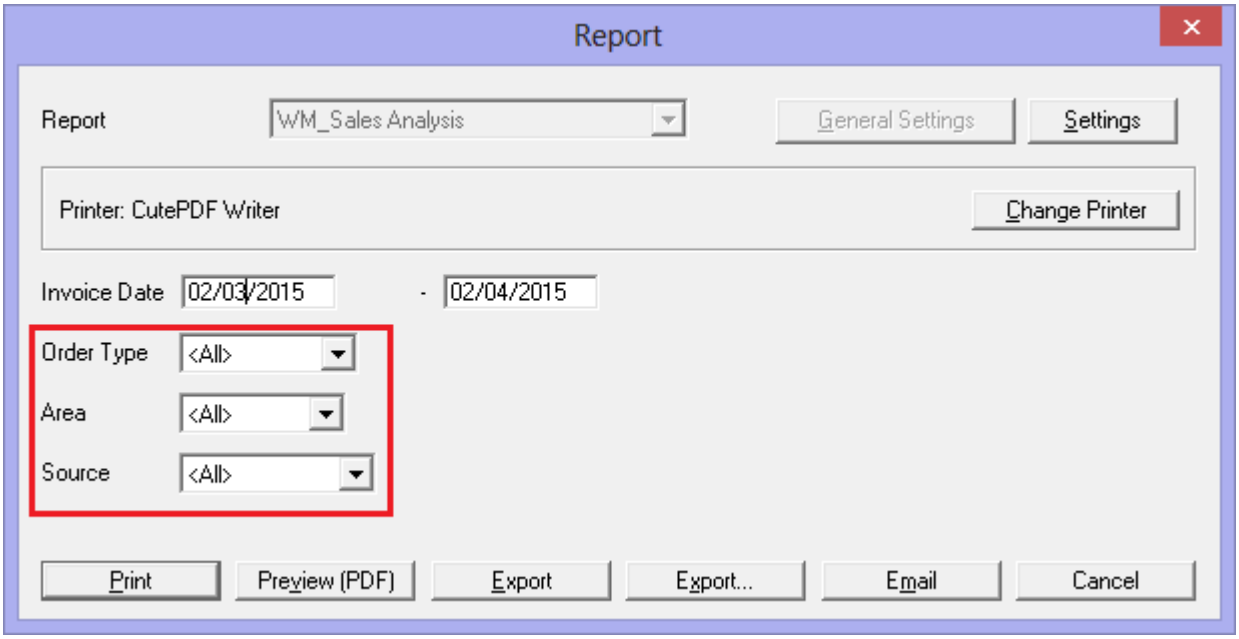


Document Headers and Footers

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

Sales Analysis

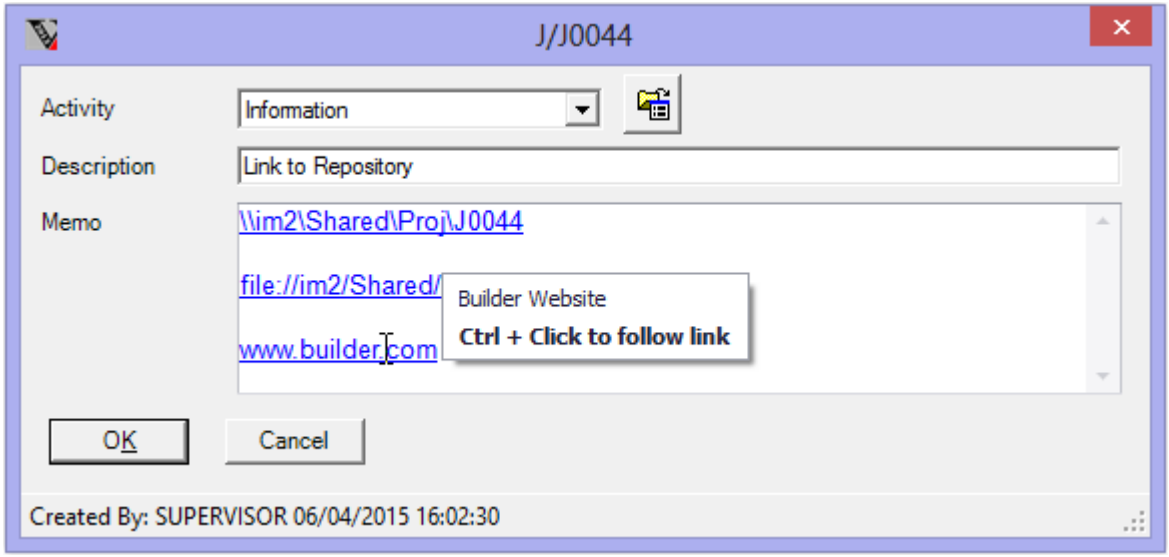
The Sales Analysis reports can now be generated for a specific Order Type, Area and/or Source i.e. these are now available as parameters.



Sales Header/Customer History

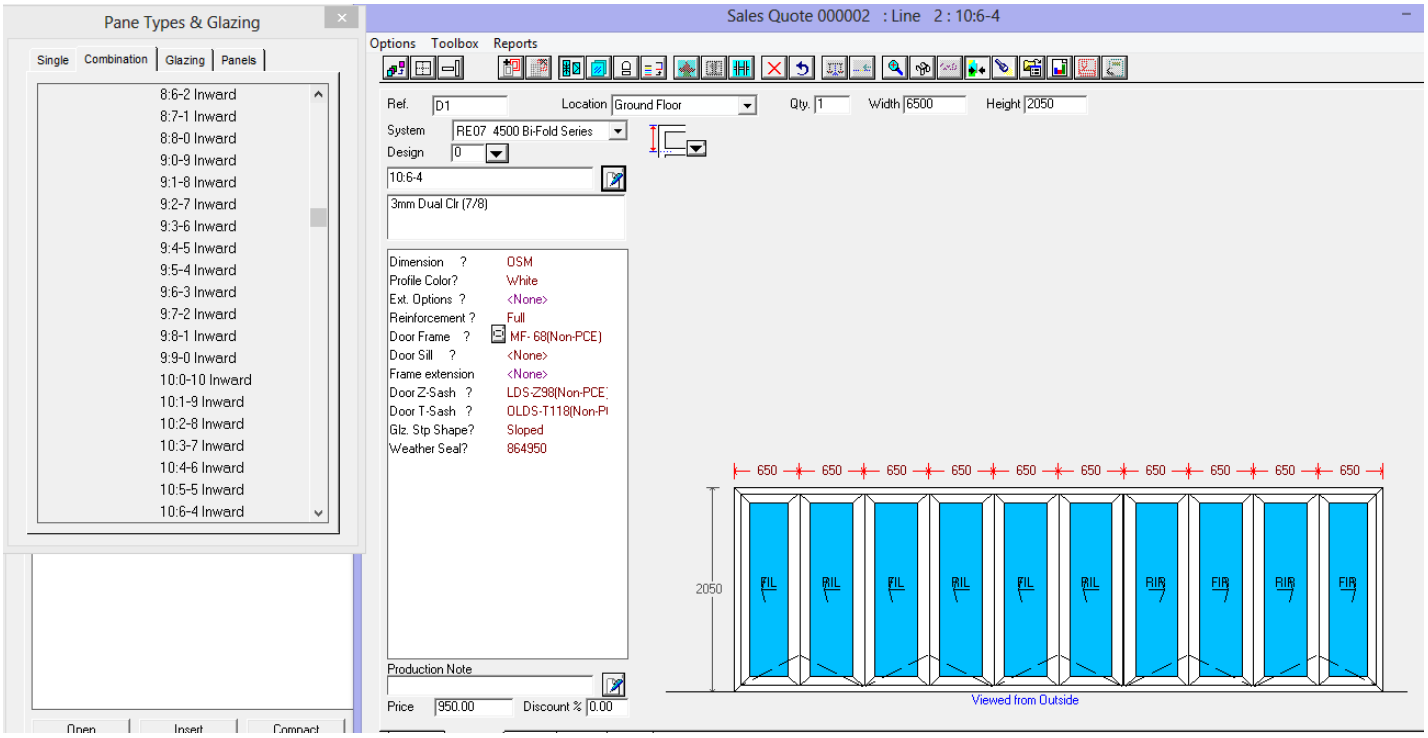
History description length has been extended to a maximum of 60 characters (instead of 50).

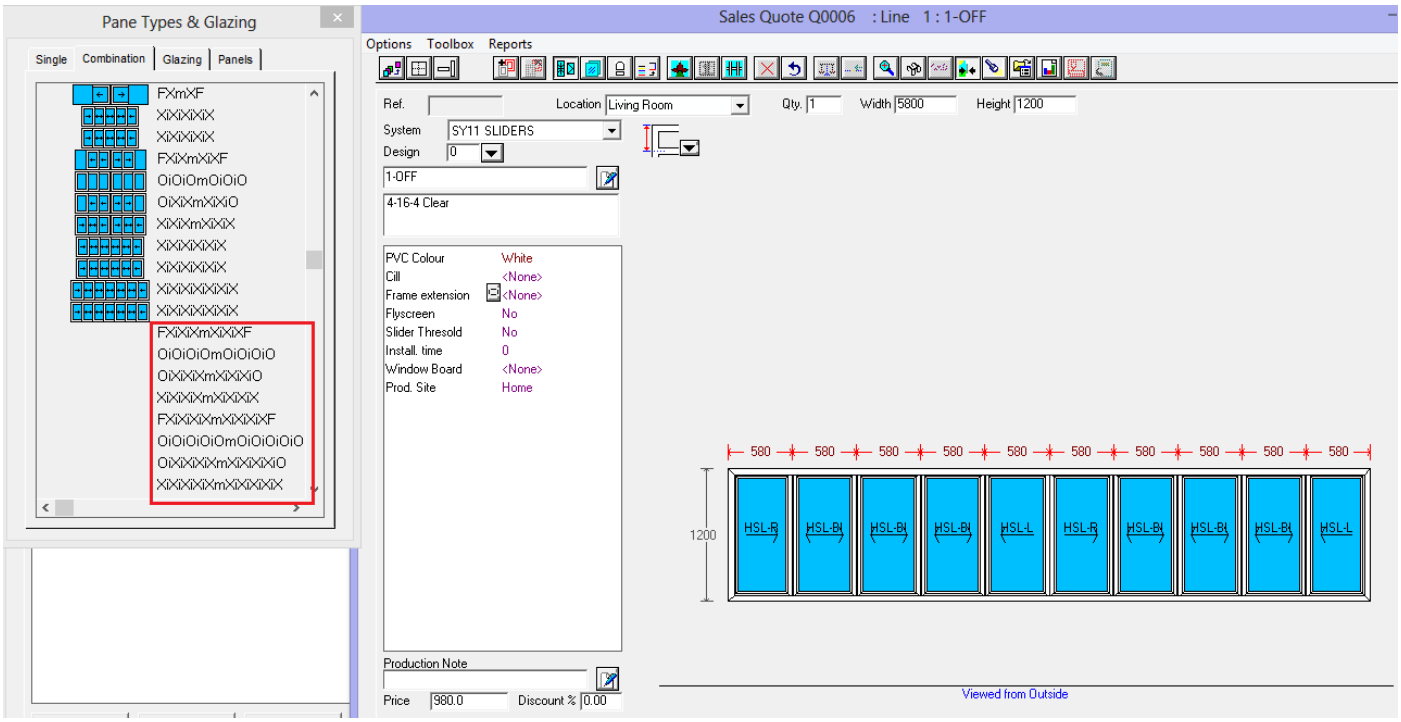
Hyperlinks to any web page or a shared folder on the network can be added to the History Memo field. As an example this is particularly useful to point to the relevant documents stored in a shared folder on the network or on Microsoft SharePoint, Lotus Notes, Google Docs or similar.



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

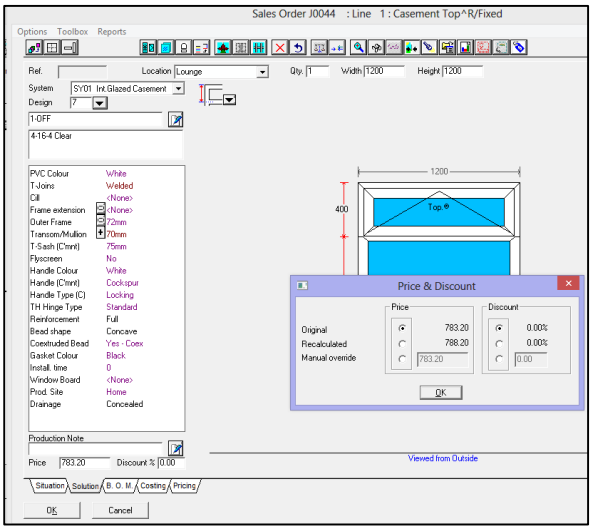
Windowmaker now supports running on Windows Server 2012 R2 operating system.

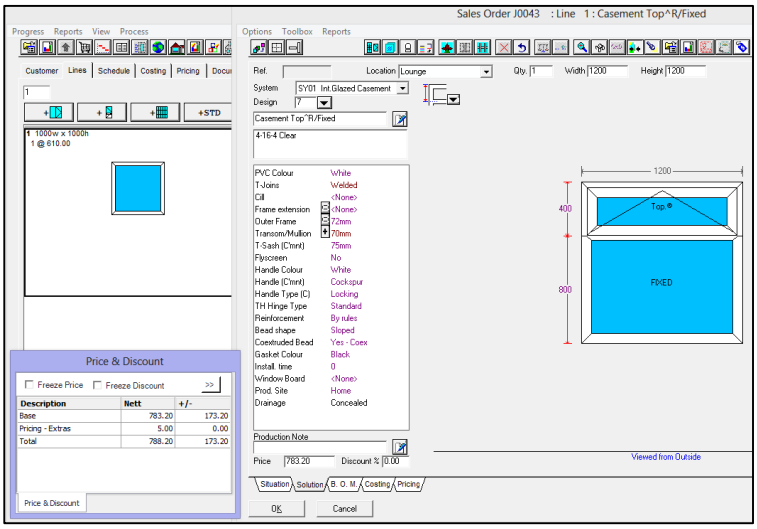
Better handling of Sales Line Price and Discount changes

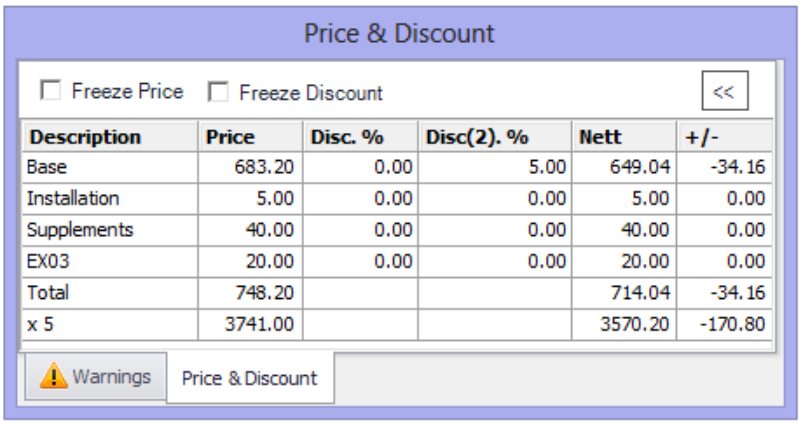
An enhanced interface is now available for controlling the price and discount changes of a Sales Line during order entry.

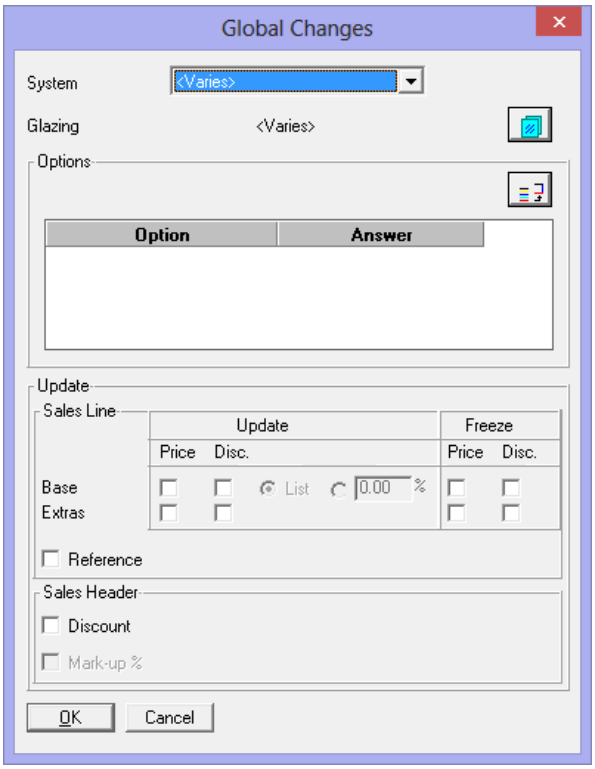
- It is no longer necessary to press OK on Price and Discount Change dialog every time it appears, thus speeding up the order entry
- It is now possible to:
- Freeze (or unfreeze) the price and/or discounts for an individual Sales Line
- Automatically freeze the price and discounts when the Sales Order 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.









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

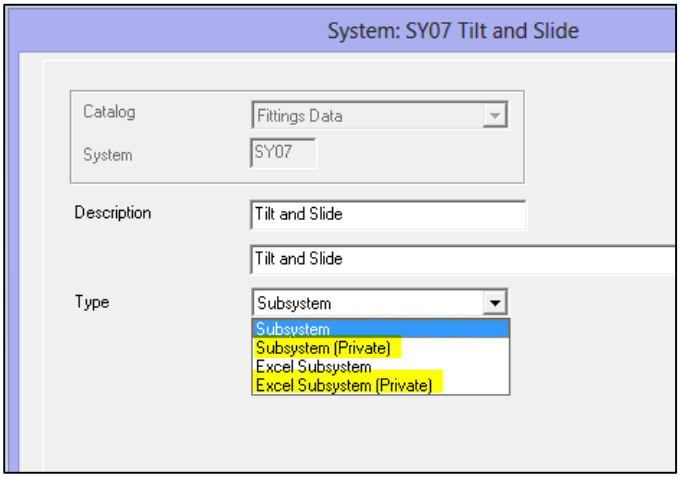
It is now possible to create Subsystems that are private to the module in which they are set-up and are not accessible from other modules.

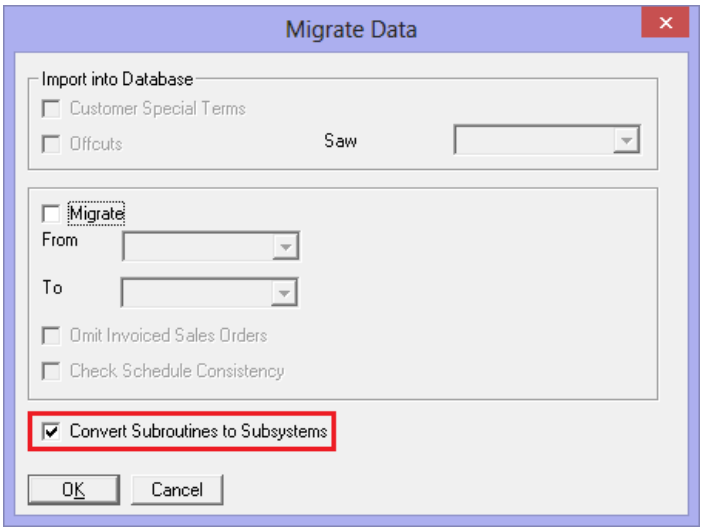
The existing subroutines can now be converted to Subsystems. Unlike subroutine a Subsystem can be:

- 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.

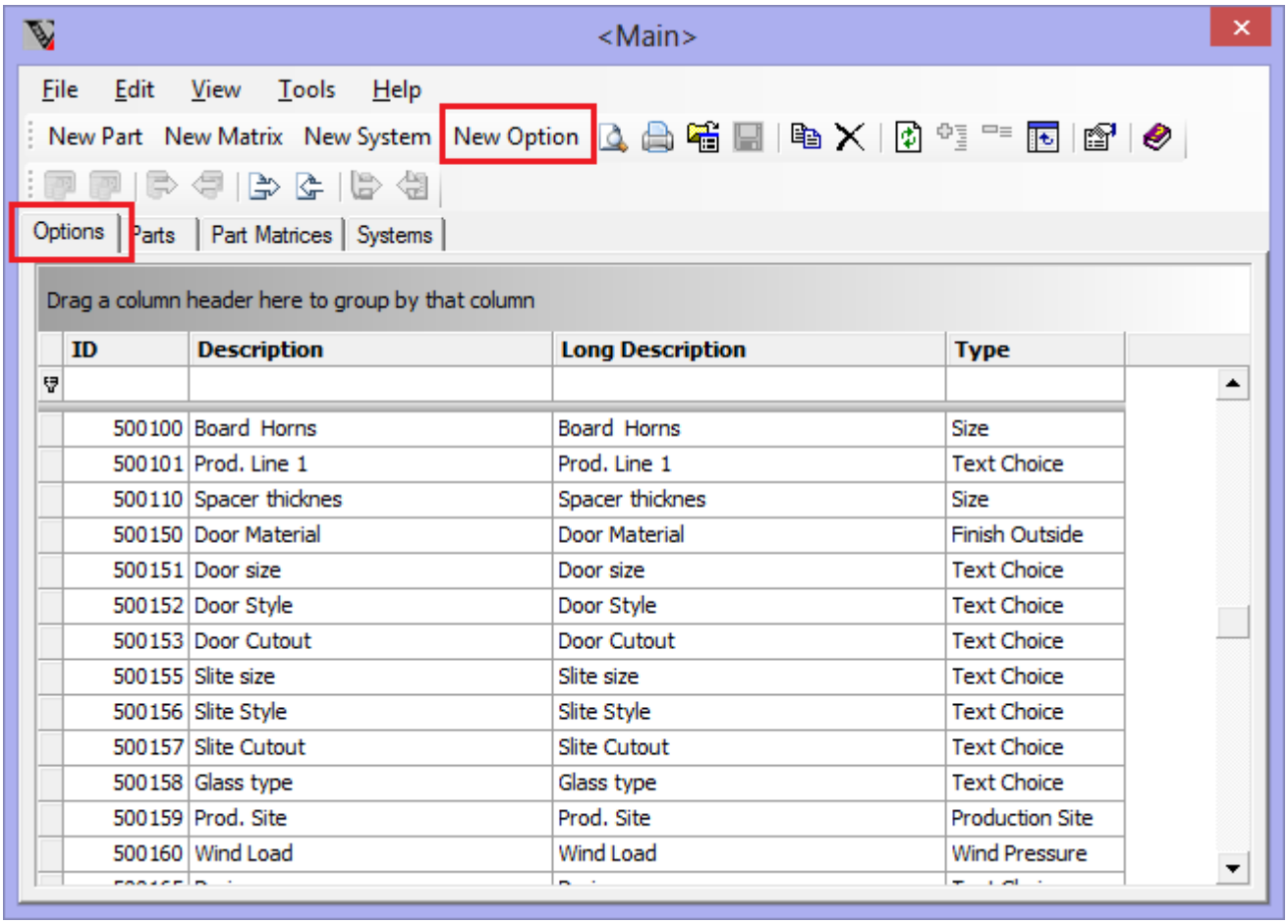


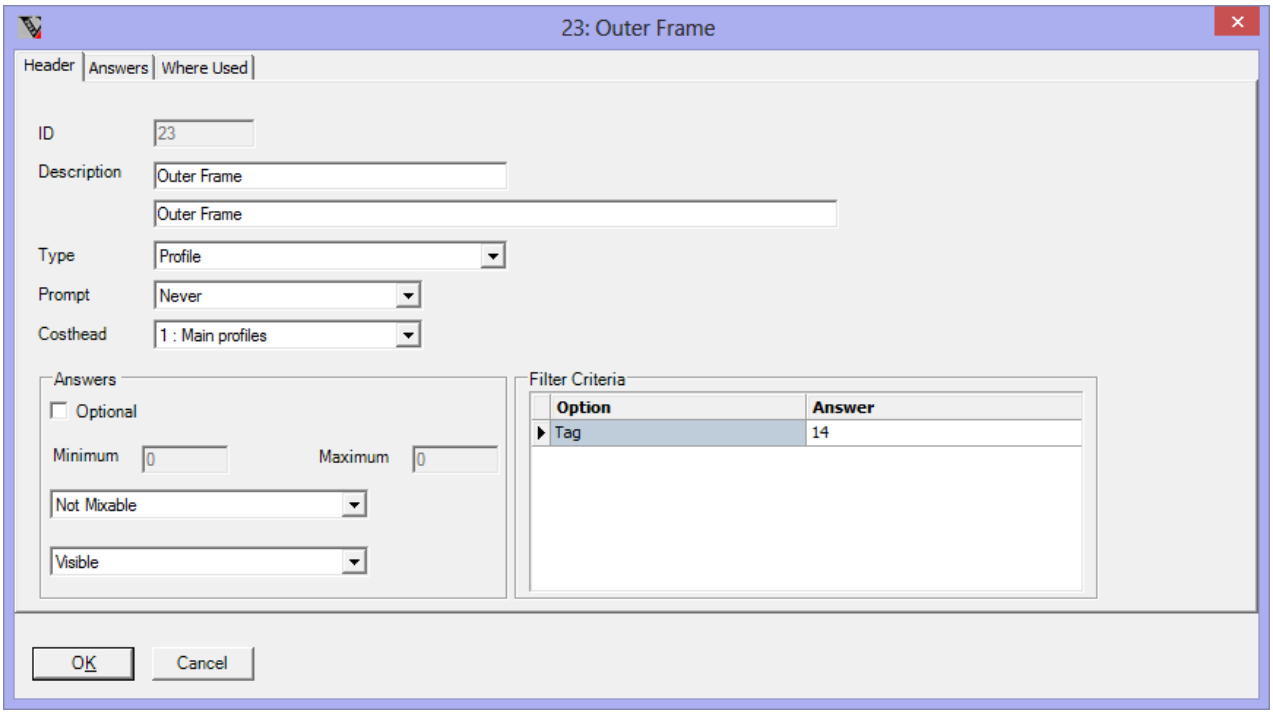


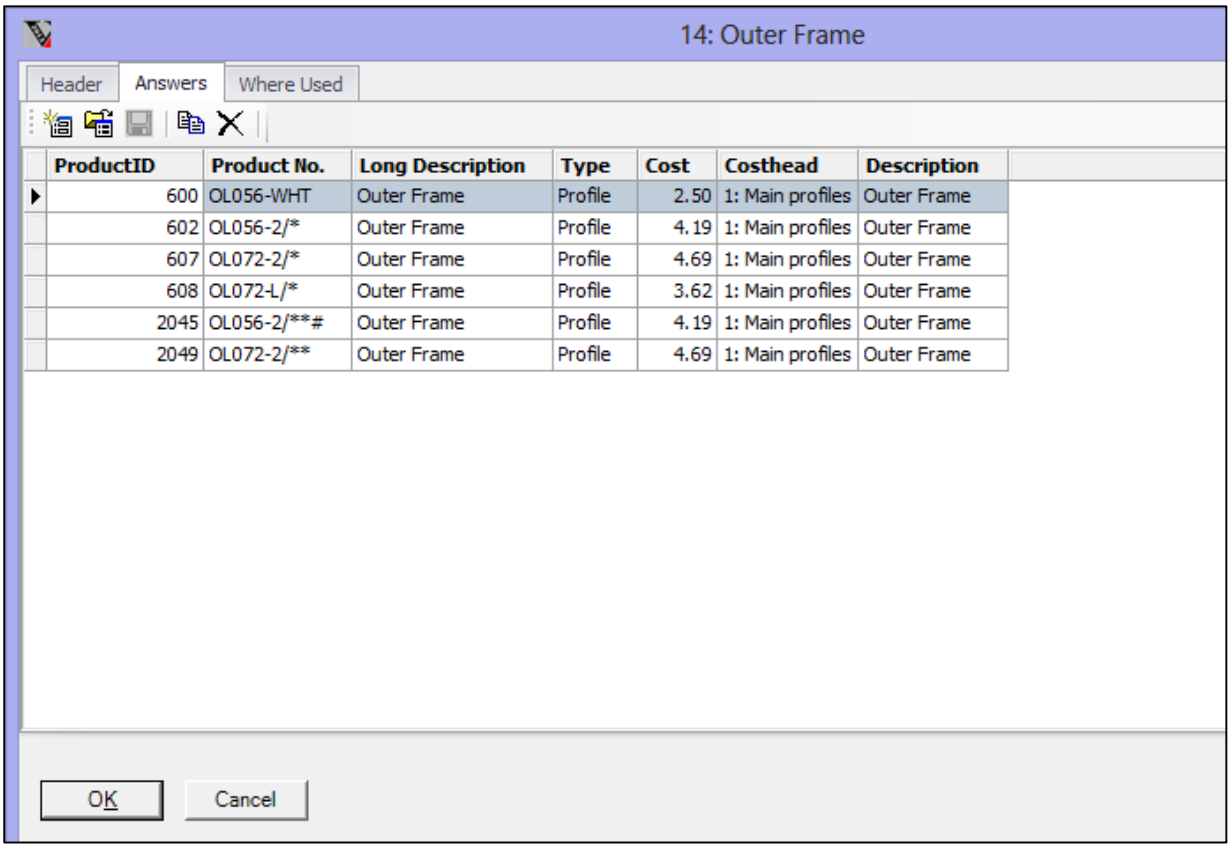
Options

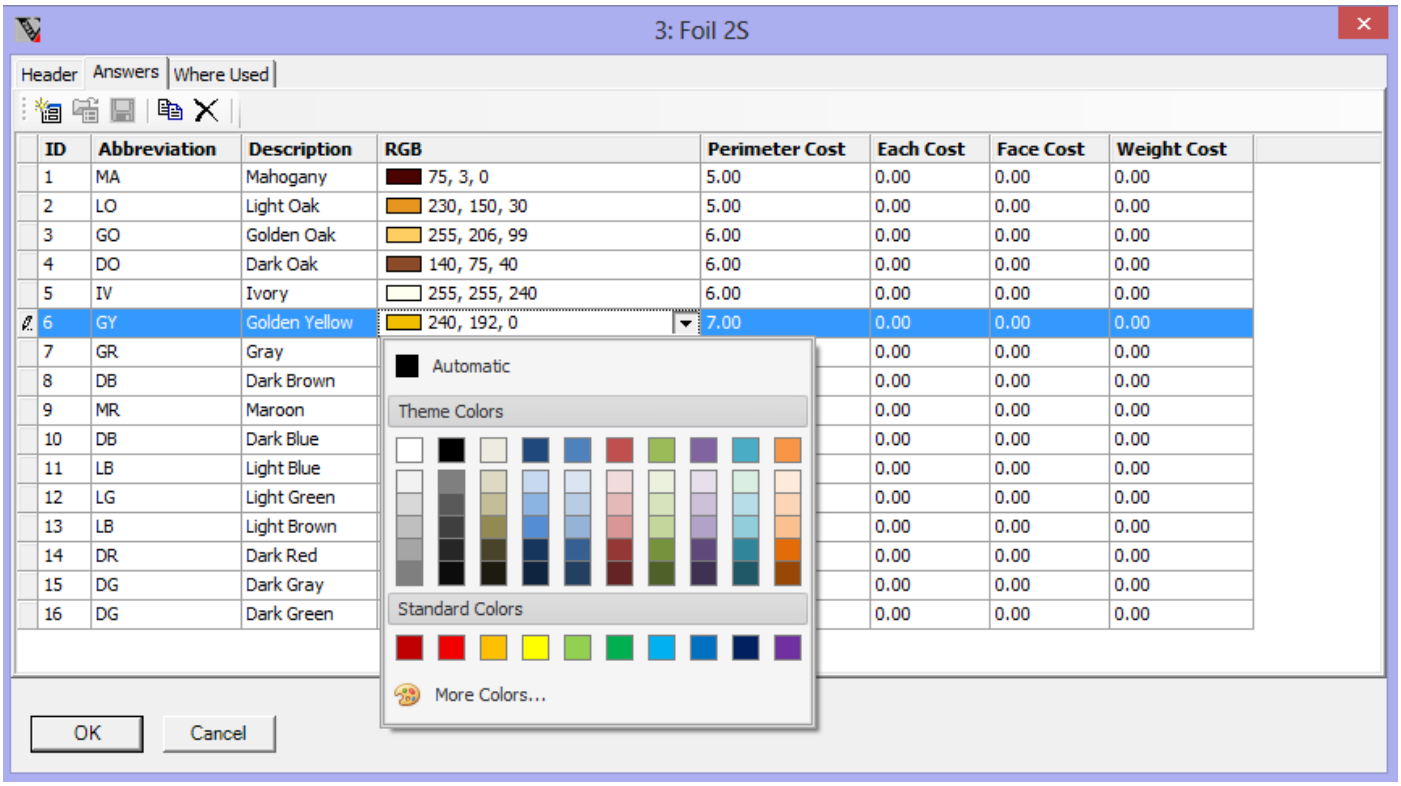
Migrated to database
Options are now stored in WMProduct table of Windowmaker database instead of WMPG.DAT and will be automatically migrated during the upgrade process. Apart from the benefits of storing in a database, option and answer descriptions can now be multi-lingual.

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




23: Outer Frame
Header
Answers
Where Used
ID
23
Description
Outer Frame
Outer Frame
Type
Profile
Prompt
Never
Costhead
1 : Main profiles
Answers
Optional
Minimum
0
Maximum
0
Not Mixable
Visible
Filter Criteria
Option
Answer
Tag
14
OK
Cancel

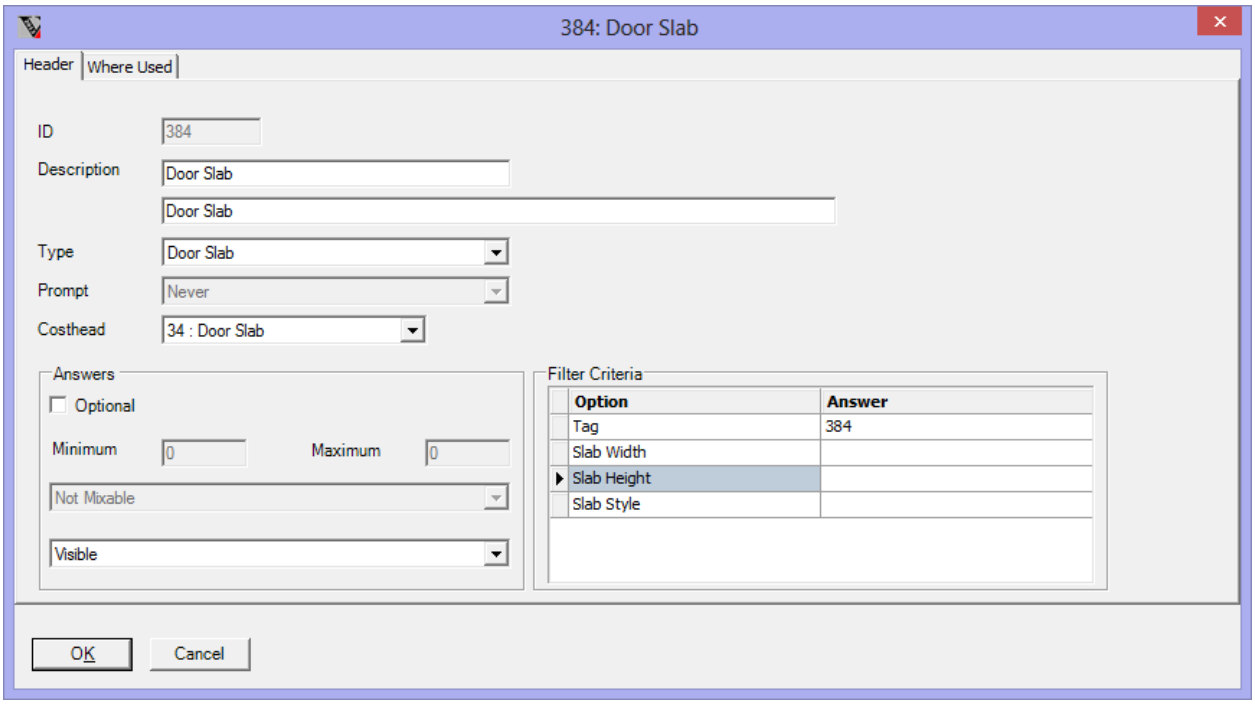

14: Outer Frame
Header
Answers
Where Used
ProductID
Product No.
Long Description
Type
Cost
Costhead
Description
600 OL056-WHT Outer Frame Profile 2.50 1: Main profiles Outer Frame
602 OL056-2/* Outer Frame Profile 4.19 1: Main profiles Outer Frame
607 OL072-2/* Outer Frame Profile 4.69 1: Main profiles Outer Frame
608 OL072-L/* Outer Frame Profile 3.62 1: Main profiles Outer Frame
2045 OL056-2/**# Outer Frame Profile 4.19 1: Main profiles Outer Frame
2049 OL072-2/** Outer Frame Profile 4.69 1: Main profiles Outer Frame
OK
Cancel



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 optionally specifying their default answers. All parts matching these criteria, across eCatalogs, are considered as the answers of that option.

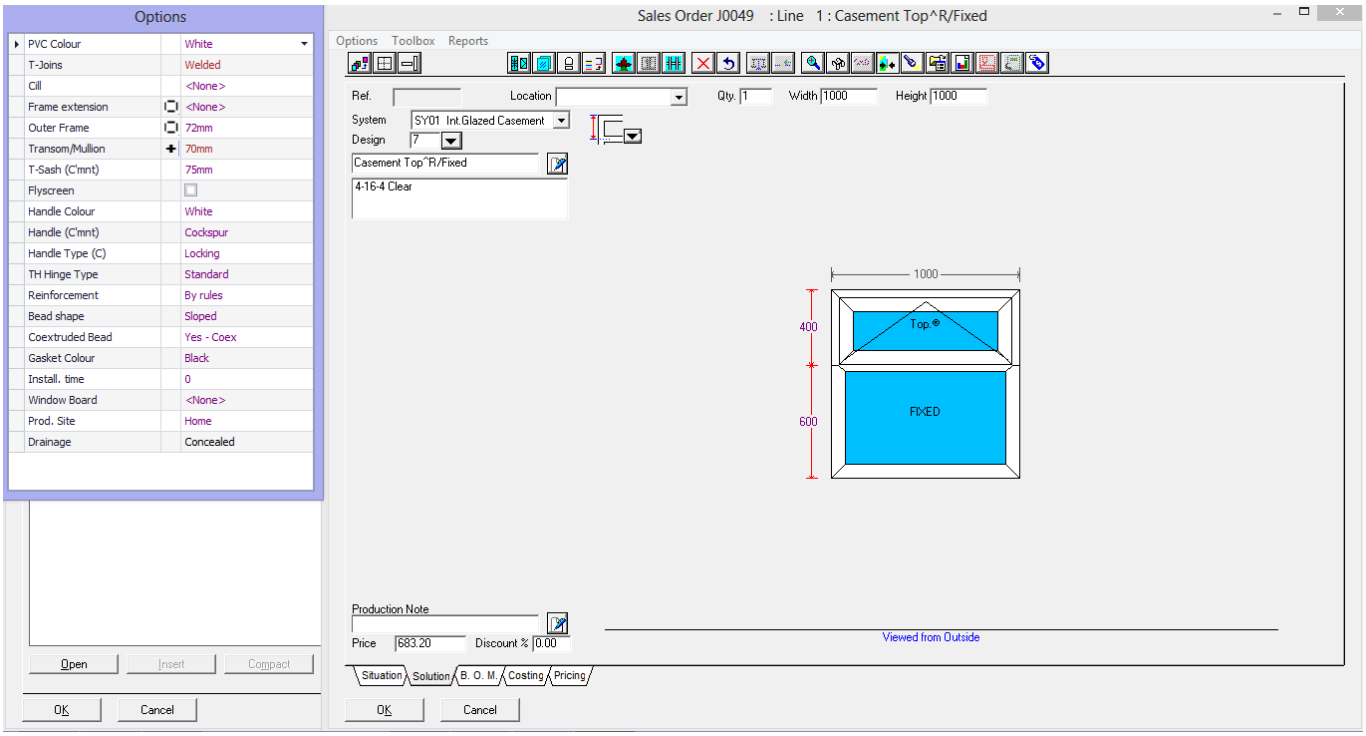
The benefits of having Part Filter options are:
1. Allows real parts to be answers to options. Previously answers were setup as non-real, then used in the rules to calculate the real parts. This will make data setup easier.
2. Allows answers to be across eCatalogs.
3. Allows merging datasets easily (e.g. 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.

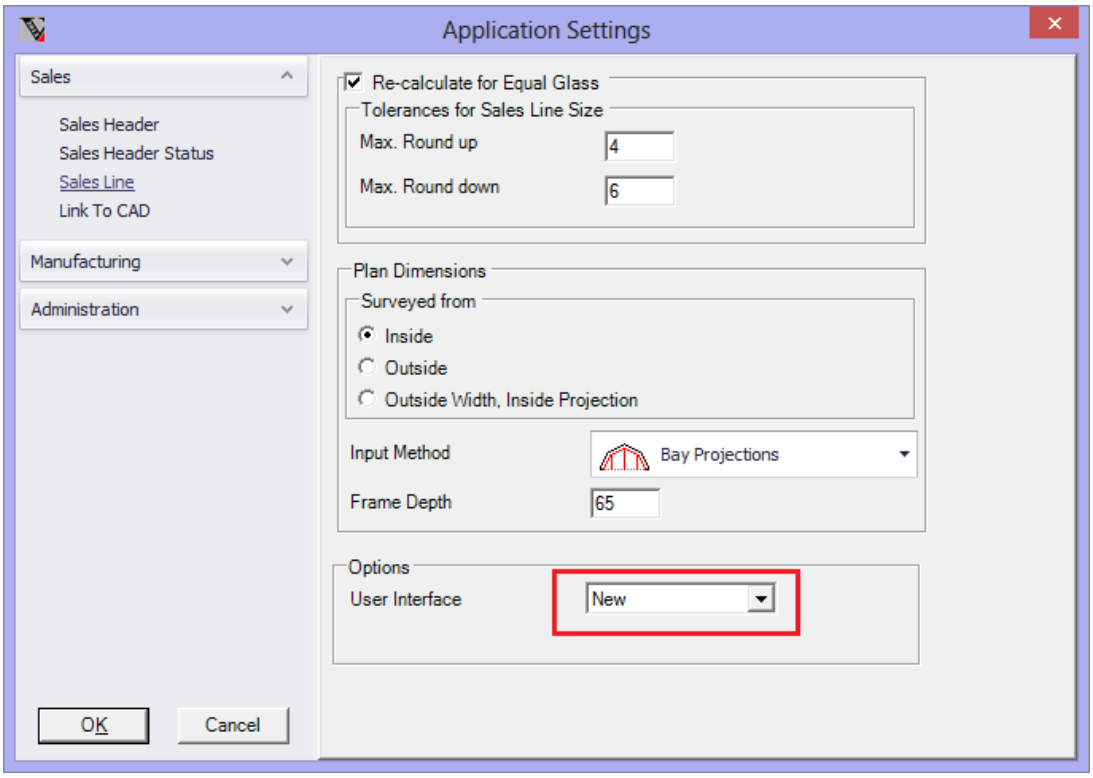


New Option Answers UI for Sales Line

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.

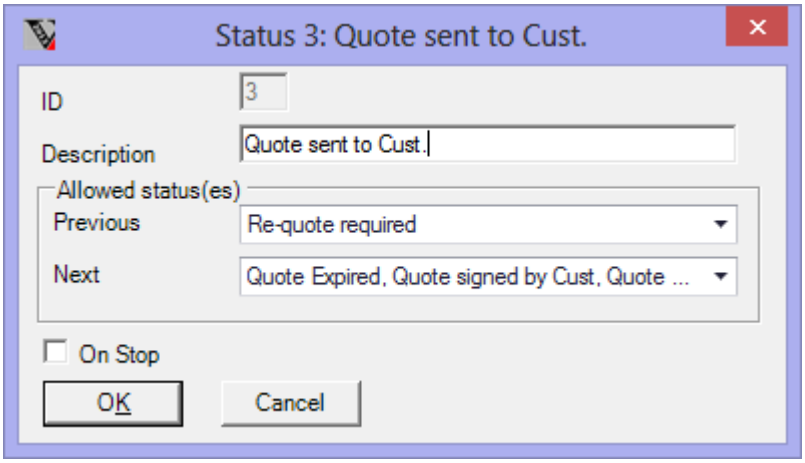
Note that configuring a Sales Line requiring Part Filter option(s) will automatically switch to using the new interface, even if existing interface is active as specified in the Application Setting.

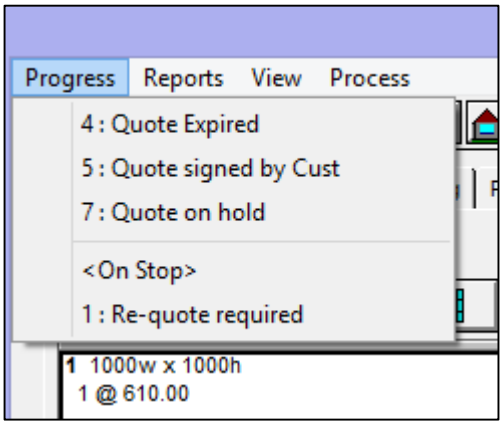




Defining Sales Header work flow

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.

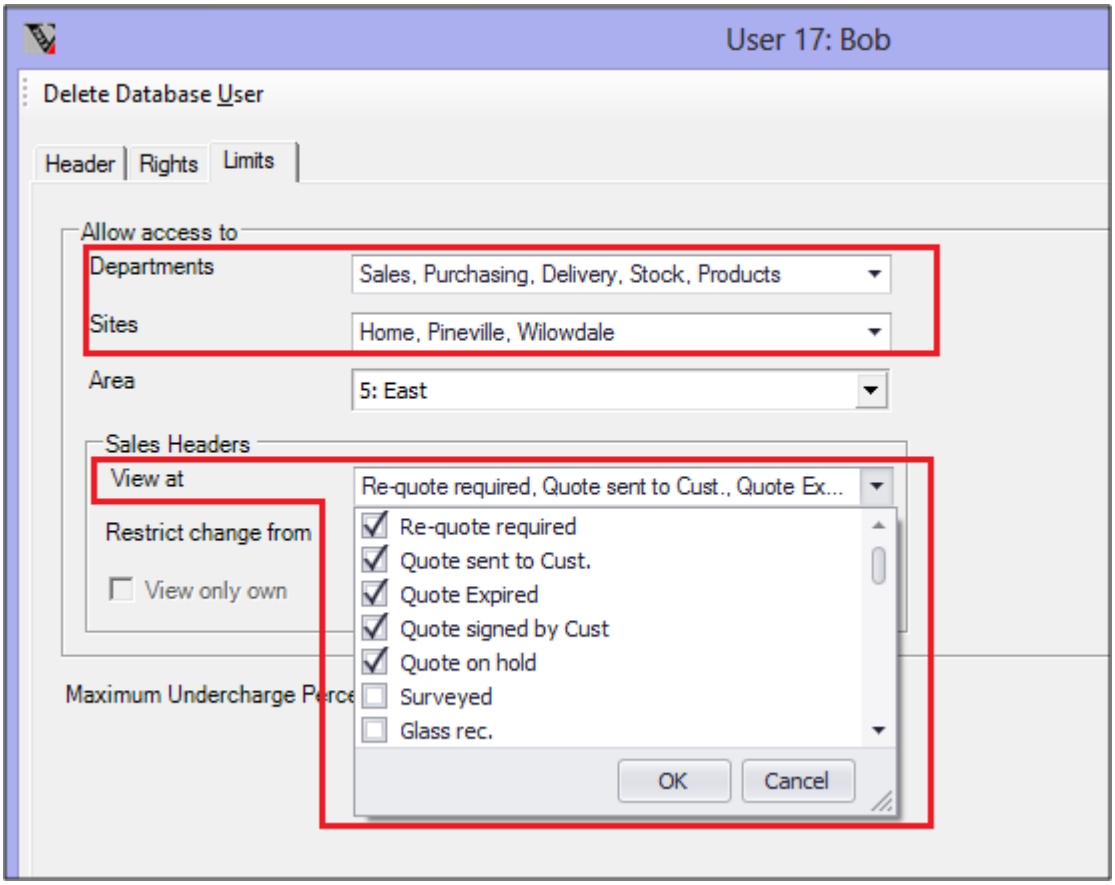




New User rights

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)



Production Batches

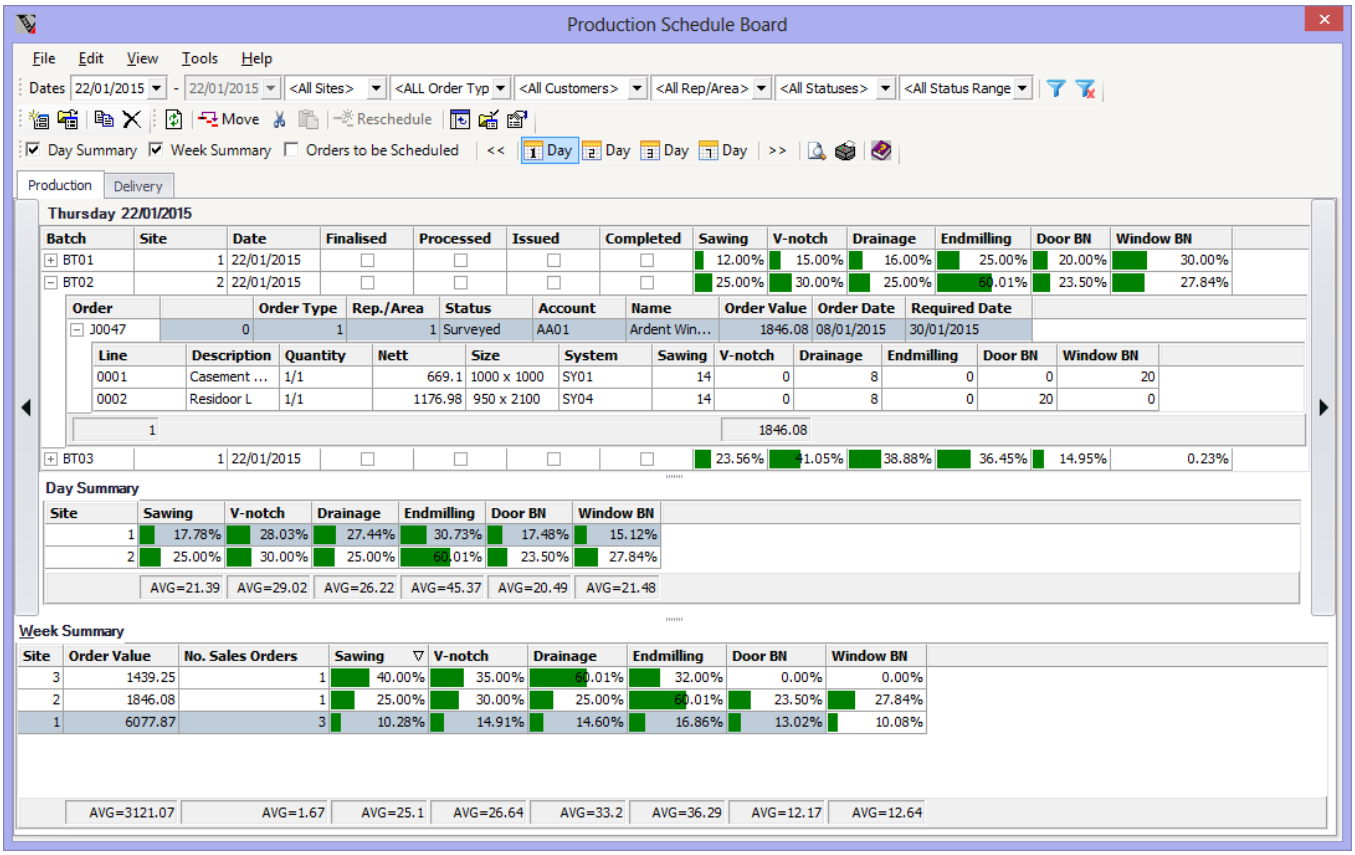
The Production Batch No. can now be up to 8 characters, instead of 6.

Enhancements to Options

Production Scheduling

This is now enhanced to display:

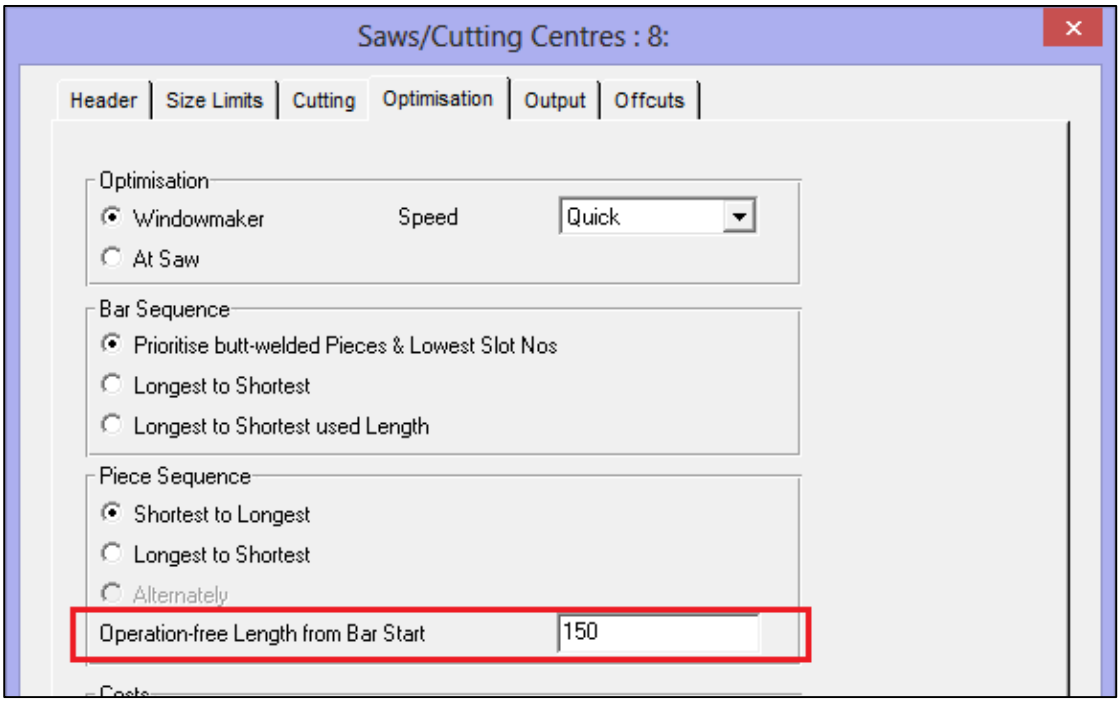
- Consumption of bottlenecks per Production Batch.
- Day summary of consumption of bottlenecks per Site, instead of per Production Batch.



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.



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.

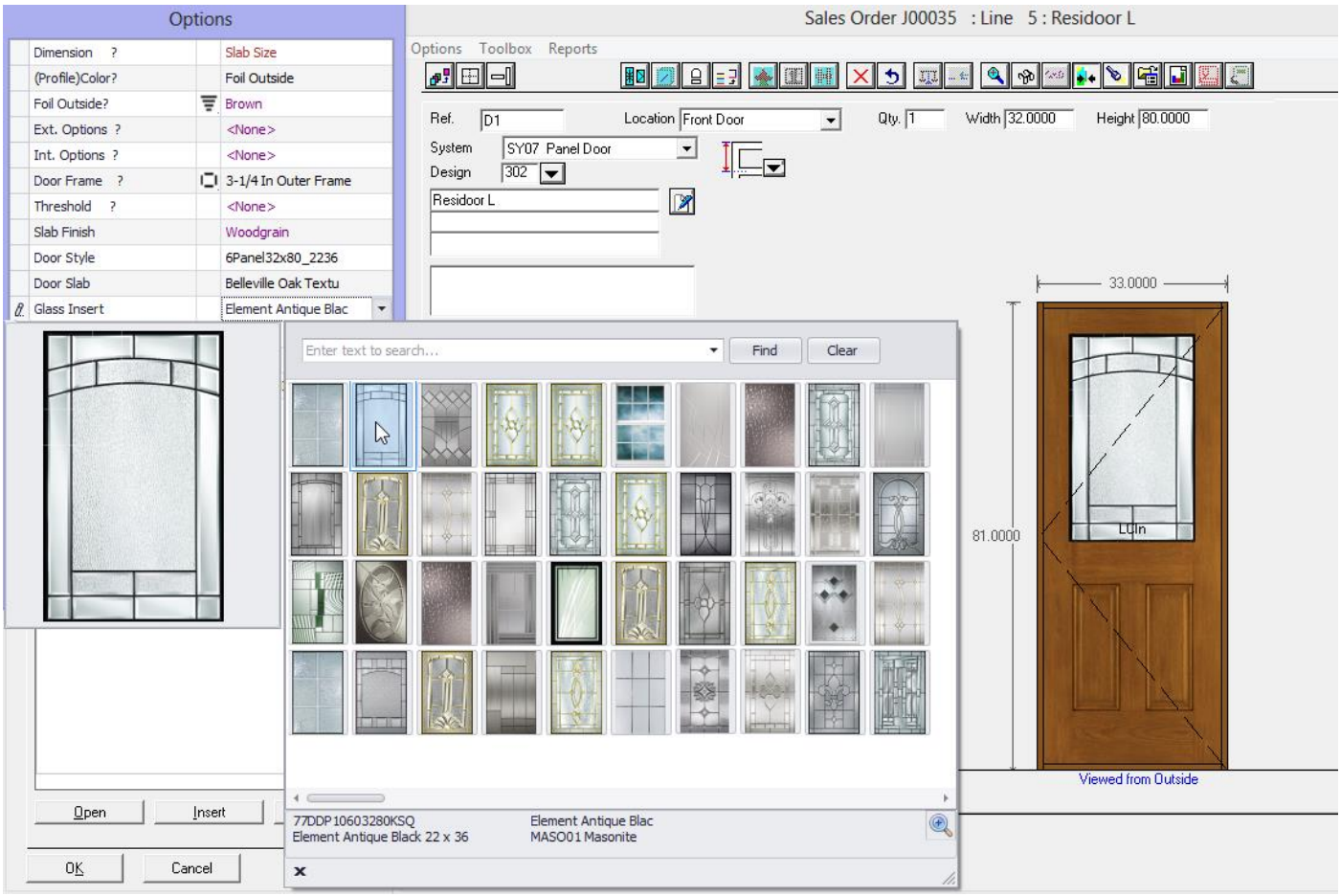
Create professional looking quotes and make it easier to showcase your slab and glass insert offering to your customers and prospects with a simple click of a button. Your sales reps no longer need to carry around bulky price lists and a paper brochure.

As a manufacturer you are able to simply:

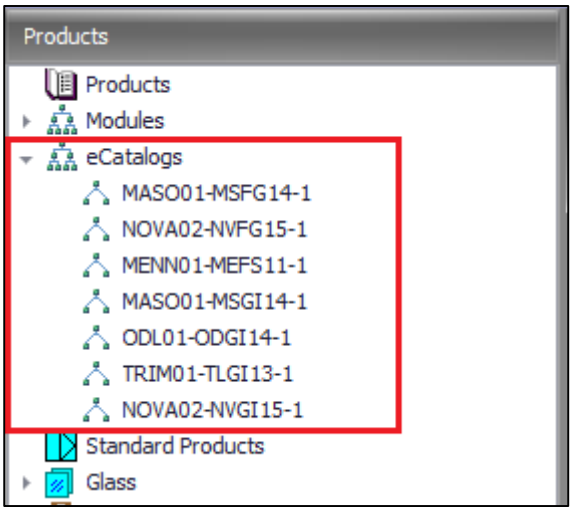
- Select which suppliers' slab and glass insert ecatalog(s) to use
- Subscribe to using these
- Plug these in the data easily and quickly
- Switch to using ecatalog(s) from different supplier(s)

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)

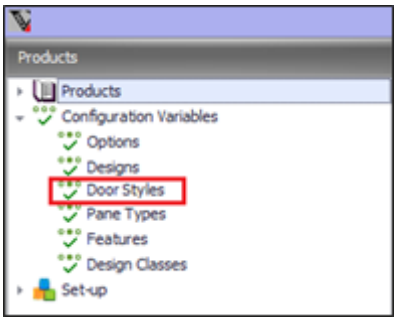


Door Slab and Glass Insert eCatalogs
With Door Slabs and Glass Inserts Windowmaker introduces true eCatalogs. Unlike Modules the eCatalogs will be read-only for users, except updating costs. This will ensure that an identical copy of eCatalog is being used by all users. This will make future updates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



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.



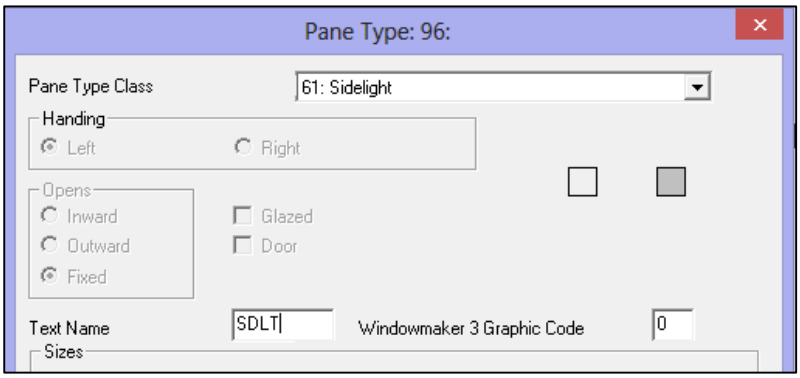
Windowmaker will publish and supply a Door Style eCatalog i.e. users cannot add, edit or delete Door Styles.

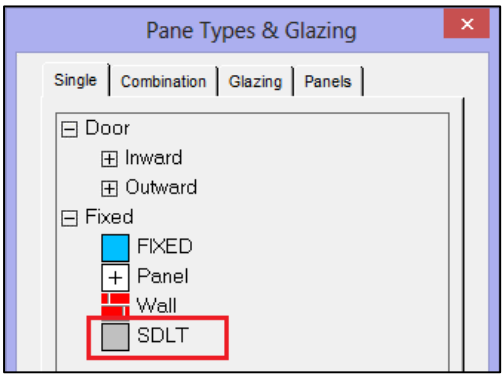
New Pane Type Class for Entrance Doors

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.





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.

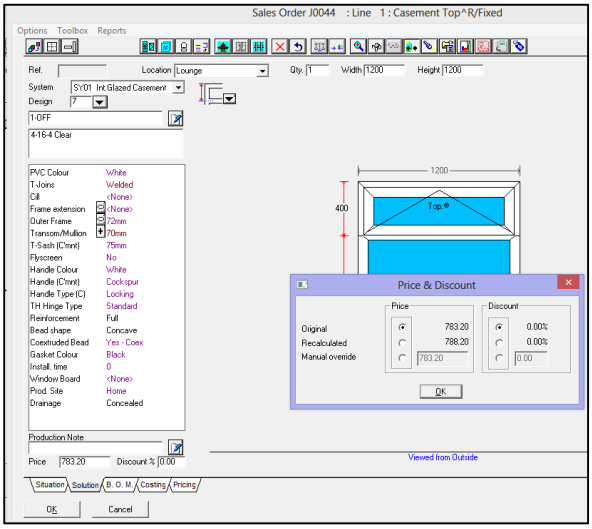
Windowmaker 2012 R3.8

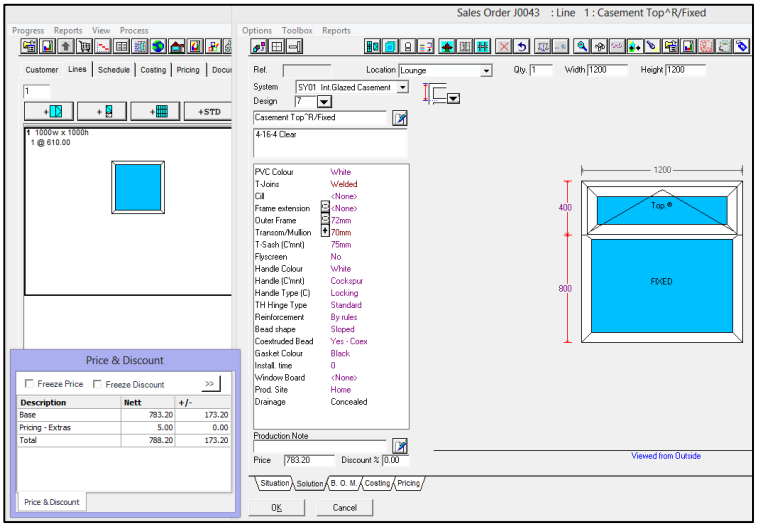
General Enhancements

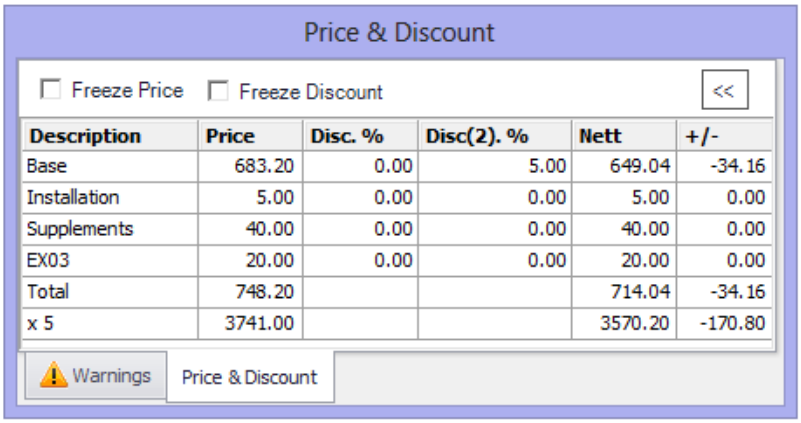
Better handling of Sales Line Price and Discount changes

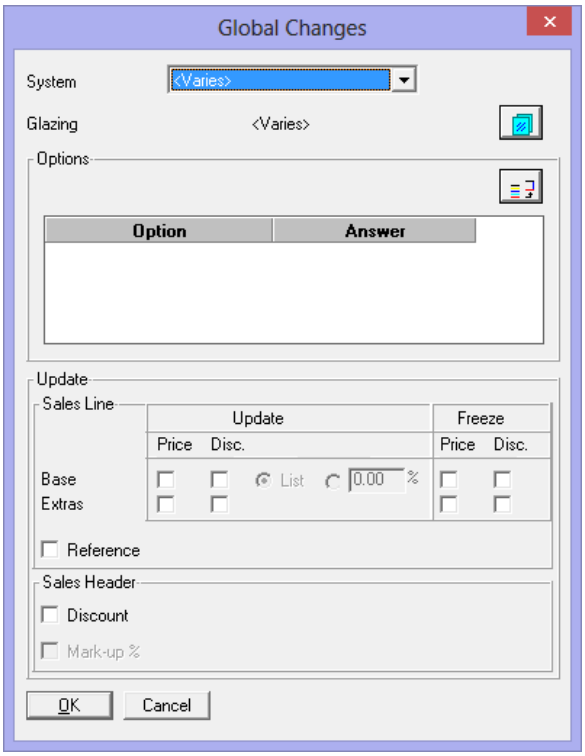
An enhanced interface is now available for controlling the price and discount changes of a Sales Line during order entry.

- 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.









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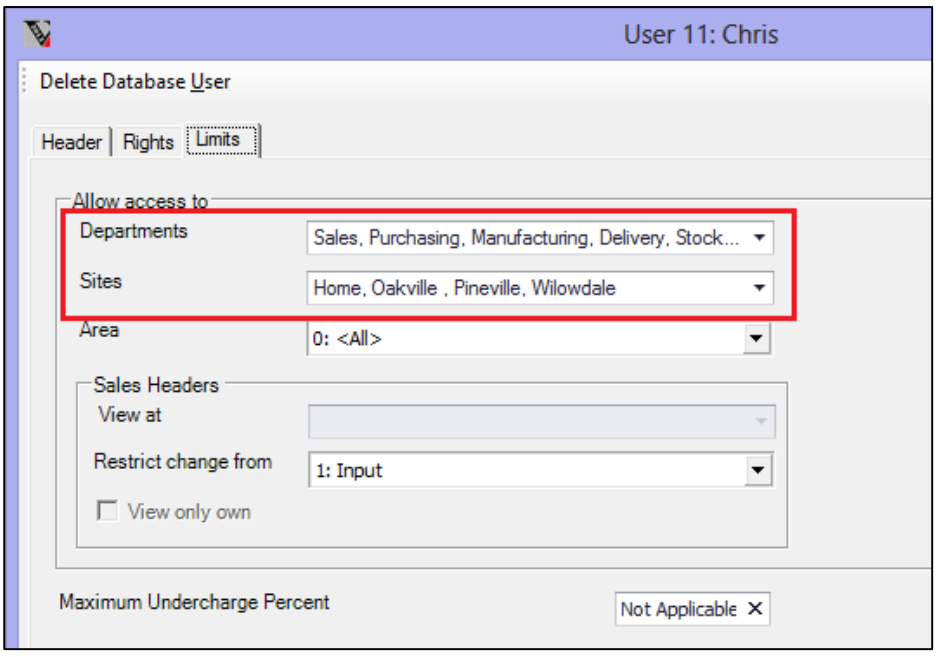


Windowmaker 2012 R3.7

Crystal Reports - New User Right - 'Export report'

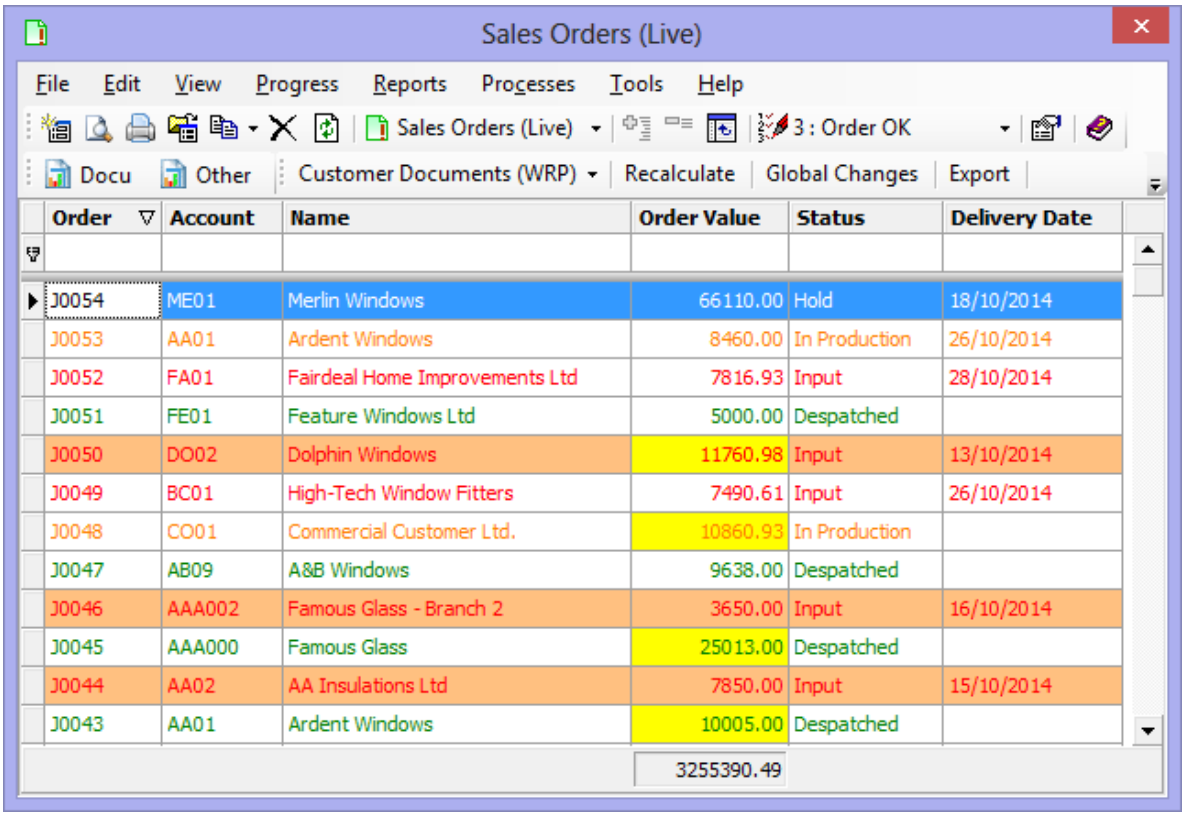
It is now possible to allow/restrict user to export any crystal report, this helps prevent users from manipulating reports after exporting, e.g. XLS or RTF formats.

Crystal Reports – Automatic generation

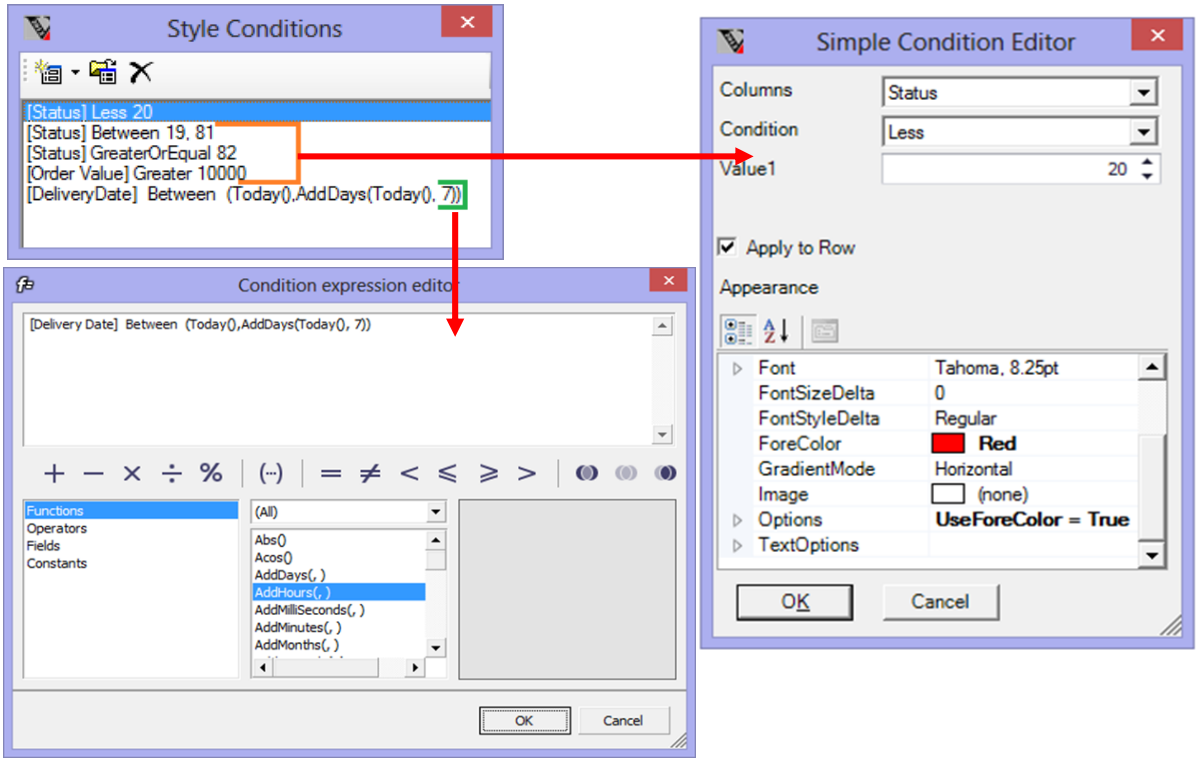
It is now possible to automatically generate Sales Quote/Order crystal reports when its status is changed. Refer 'How to automatically generate Crystal reports on Status Change' in the help file for details.

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:



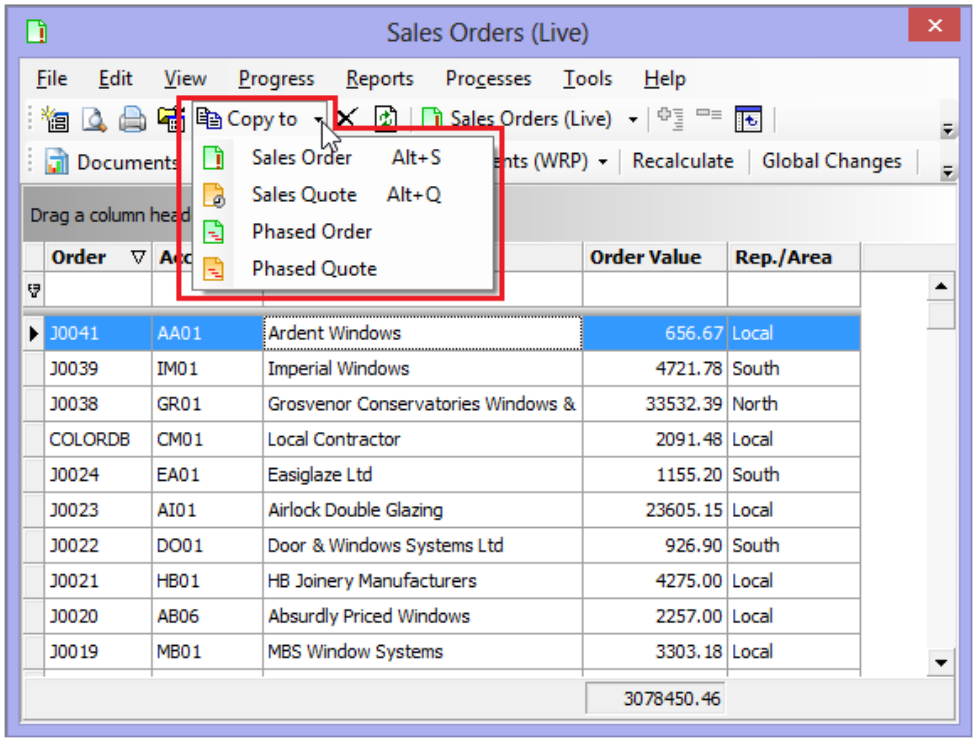
Order	Account	Name	Order Value	Status	Delivery Date
J0054	ME01	Merlin Windows	66110.00	Hold	18/10/2014
J0053	AA01	Ardent Windows	8460.00	In Production	26/10/2014
J0052	FA01	Fairdeal Home Improvements Ltd	7816.93	Input	28/10/2014
J0051	FE01	Feature Windows Ltd	5000.00	Despatched	
J0050	DO02	Dolphin Windows	11760.98	Input	13/10/2014
J0049	BC01	High-Tech Window Fitters	7490.61	Input	26/10/2014
J0048	CO01	Commercial Customer Ltd.	10860.93	In Production	
J0047	AB09	A&B Windows	9638.00	Despatched	
J0046	AAA002	Famous Glass - Branch 2	3650.00	Input	16/10/2014
J0045	AAA000	Famous Glass	25013.00	Despatched	
J0044	AA02	AA Insulations Ltd	7850.00	Input	15/10/2014
J0043	AA01	Ardent Windows	10005.00	Despatched	
			3255390.49		

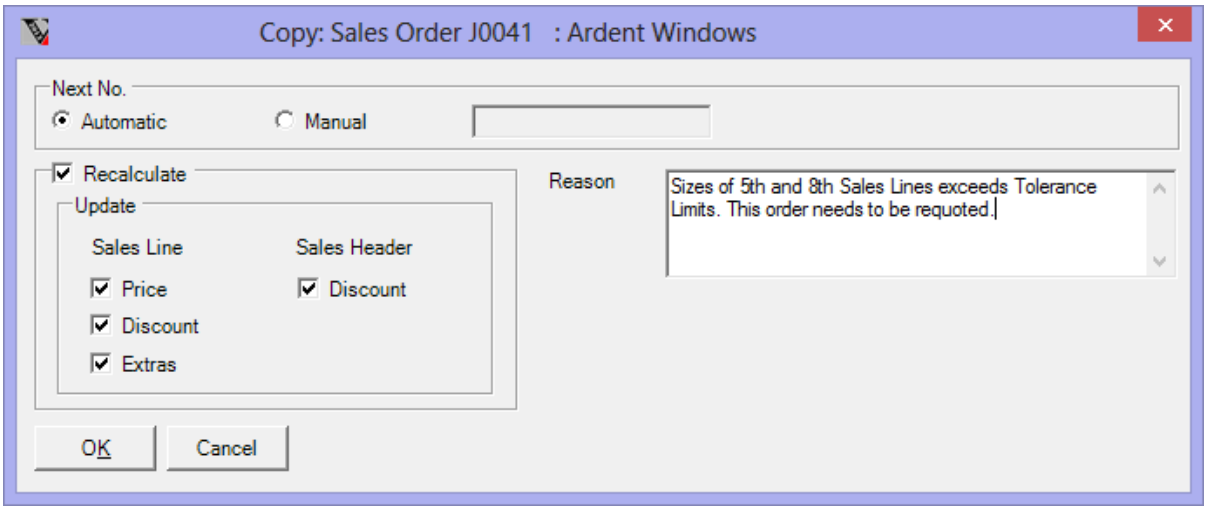


Refer "How to apply conditional formatting on grid based set-up forms" topic in the help file for details.

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.





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.

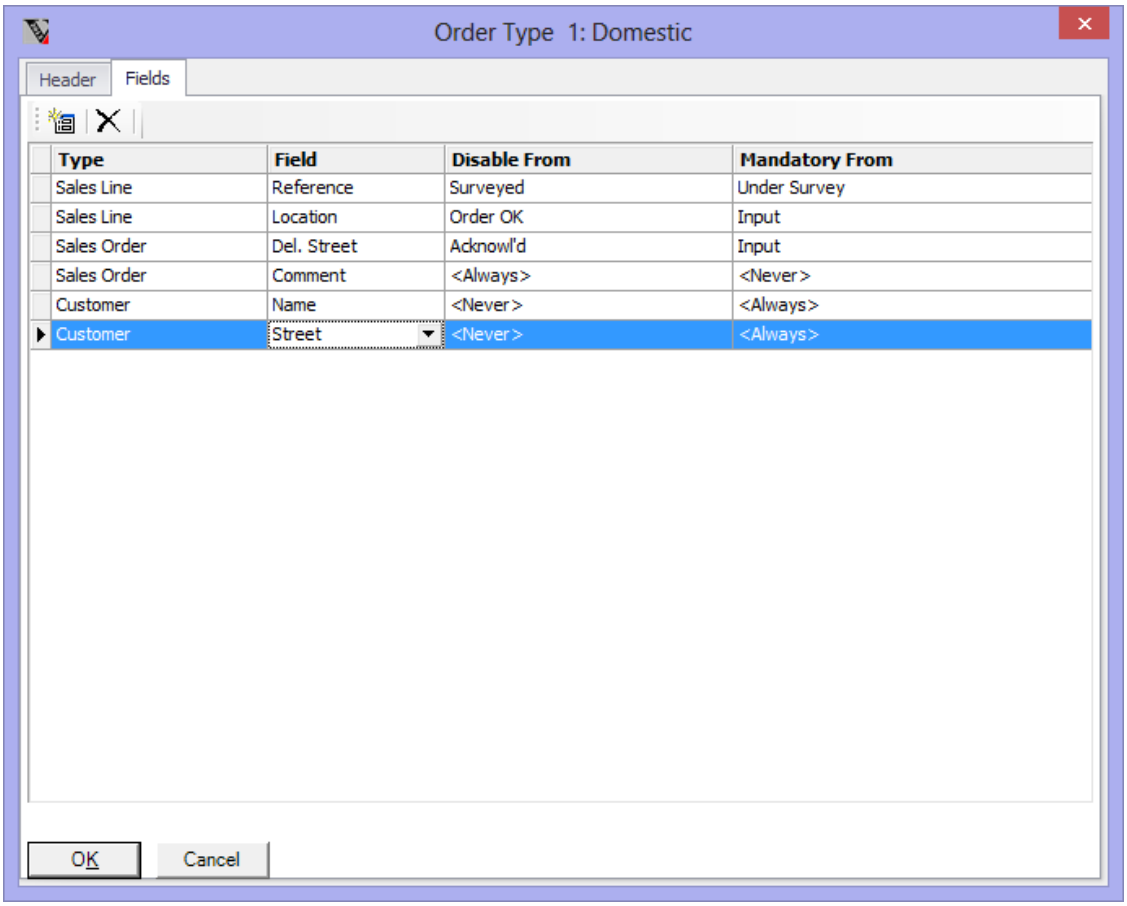
Enhancement to Products

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.



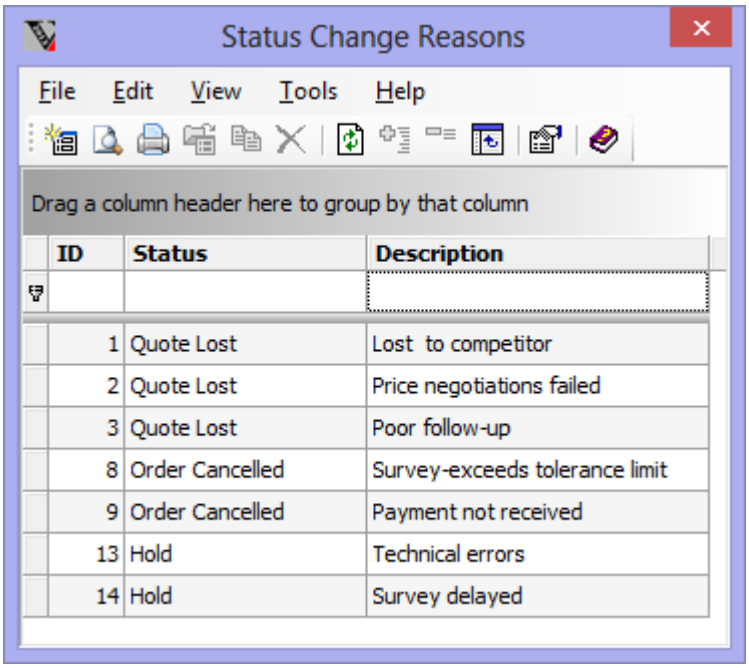
Refer 'How to make fields mandatory/read-only/not applicable at order entry?' for details.

Windowmaker 2012 R3.6

General Enhancements

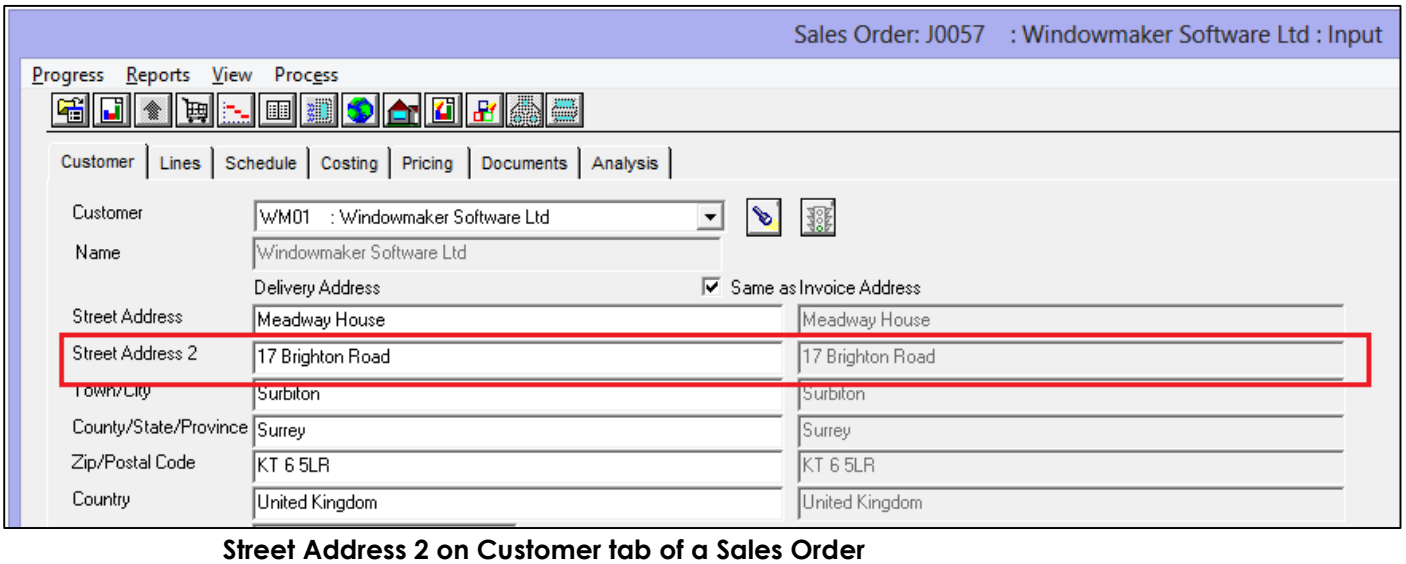
Specifying reason for a status change

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.



More Address Lines

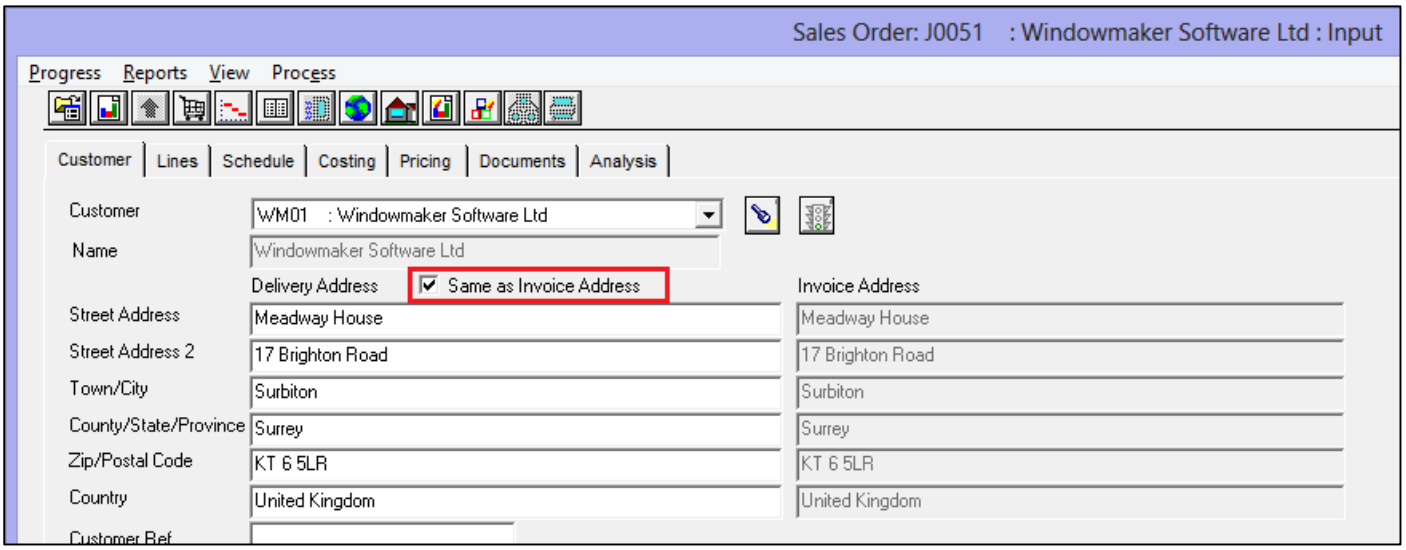
Windowmaker now supports an additional 'Street Address2' line for address, at all places in Windowmaker. This new address line is included on all the standard Windowmaker reports where the address is output. Each address line can now have up to 50 characters.



Street Address 2 on Customer tab of a Sales Order

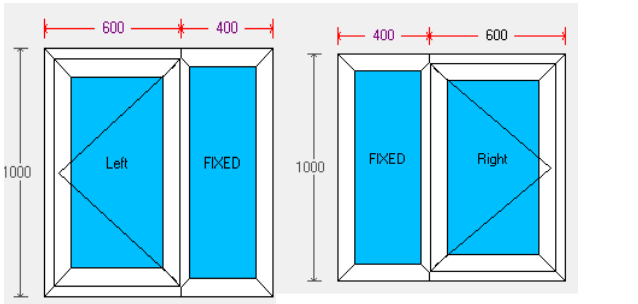
Delivery Address

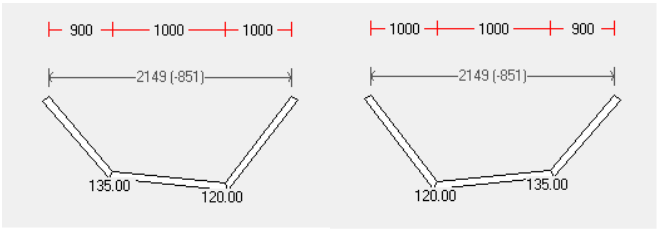
For a Sales Quote/Order you can now specify whether the Delivery Address is the same as the Invoice address, to avoid retyping if that is the case.

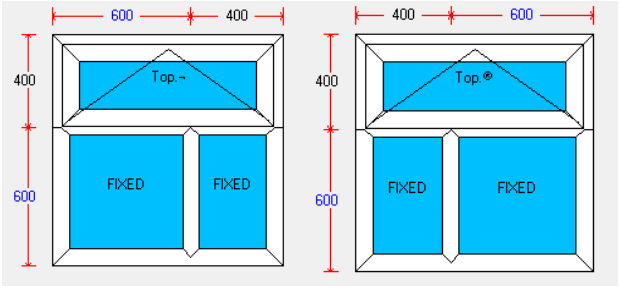


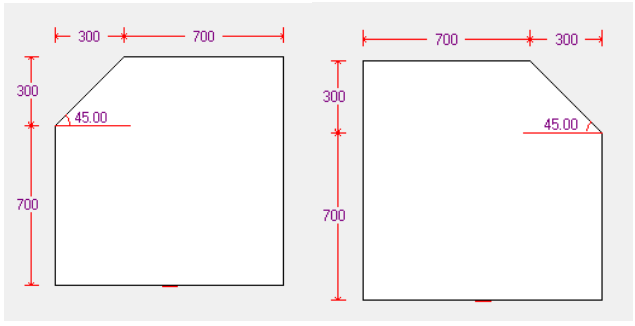
Mirror Sales Lines

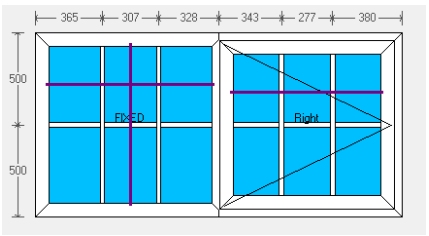
It is now possible to (horizontally) mirror Sales Lines in Windowmaker. This is useful to change to a design with opposite handing.
Examples of mirrored designs:

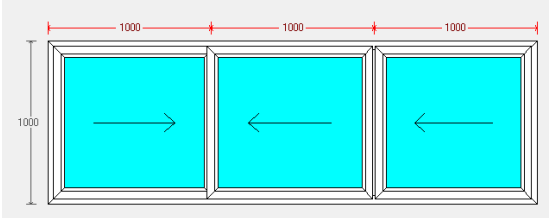


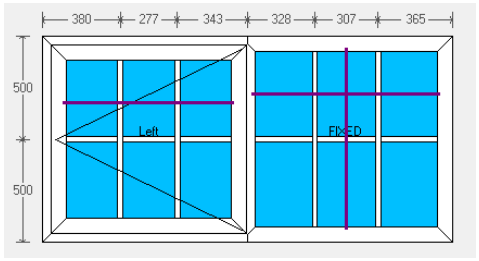


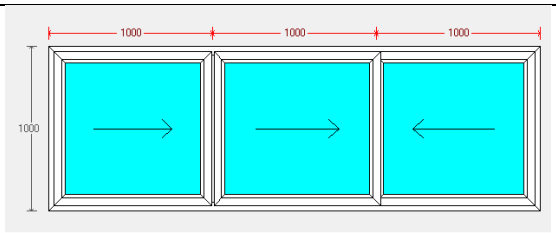












For more details refer 'How to mirror Sales Lines'in Windowmaker help.

Split Sales Lines

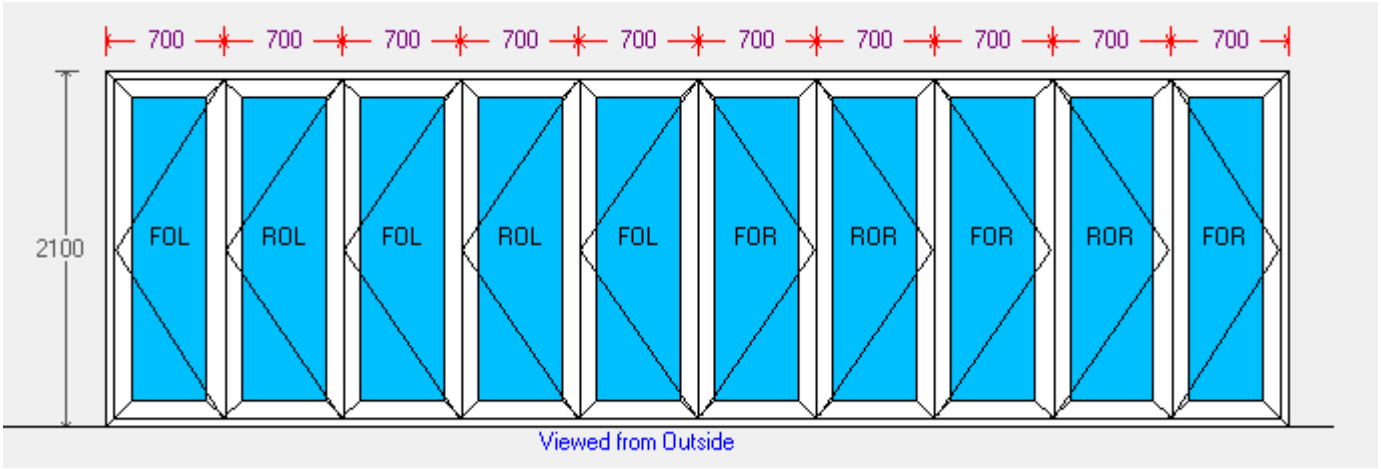
It is now possible to split a Sales Line into two in normal Sales Orders. Previously this was only possible for Sales Lines in a Phase (of the Phased Order).

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

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

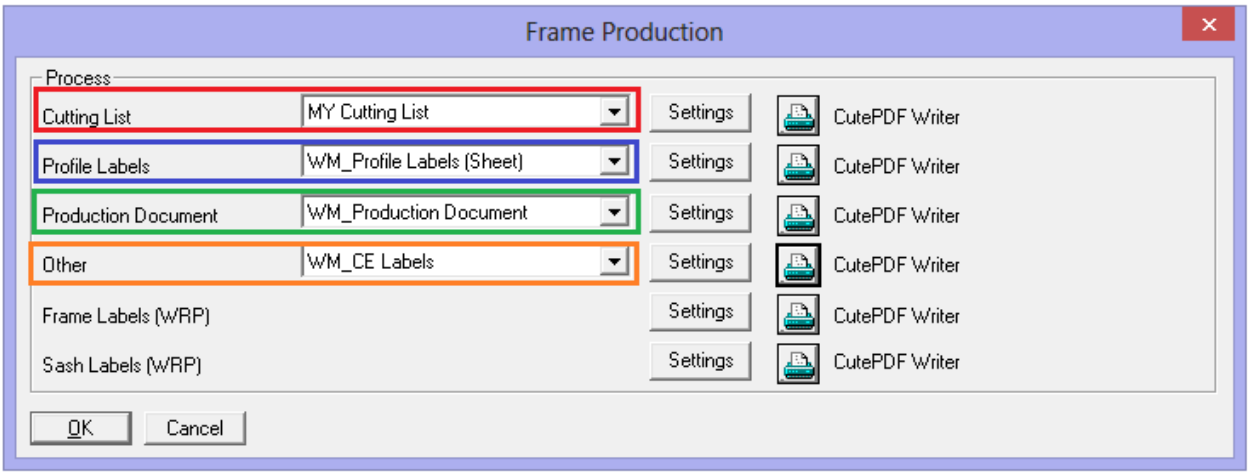
It is now possible to process a large production batch, containing sales lines resulting in a cumulative BOM line count of 65,000+. Earlier, this resulted in a 'Too many records' error.

Frame Production Settings

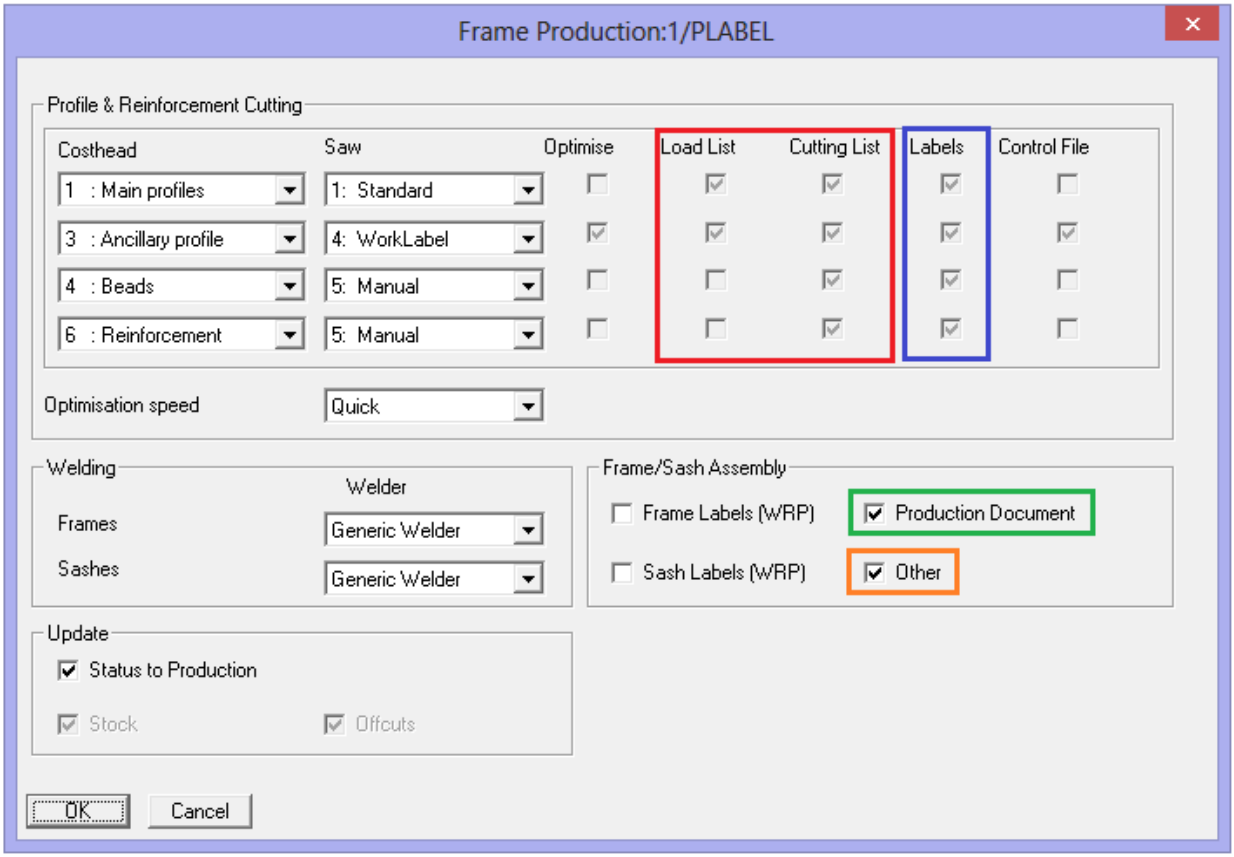
This is now enhanced to select Crystal Reports corresponding to the Frame Production. This enables selecting:

- 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.

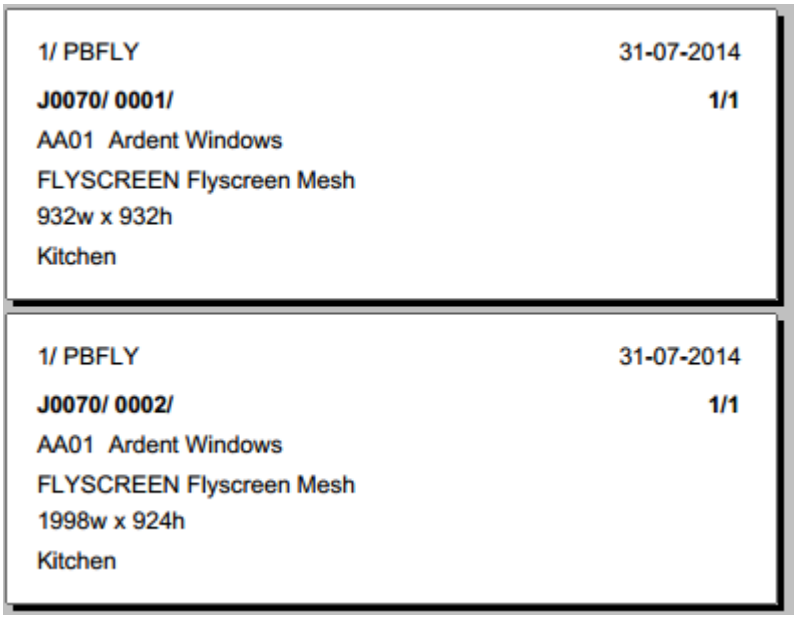


The colour coding shows that reports that will be generated when running Frame Production.



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.

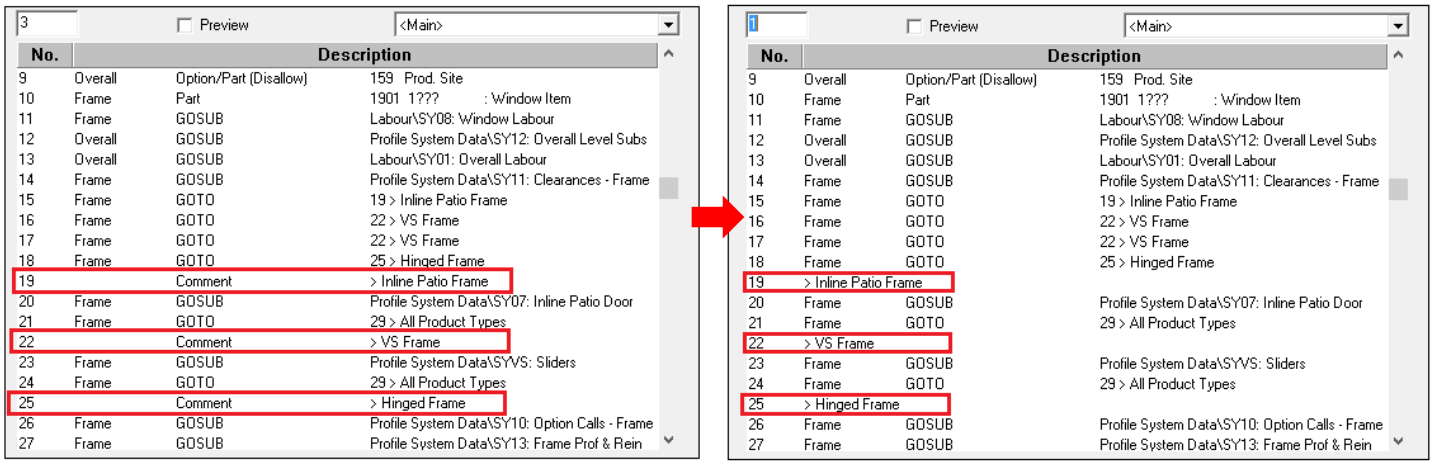


Profile/Glass/Frame Labels

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:

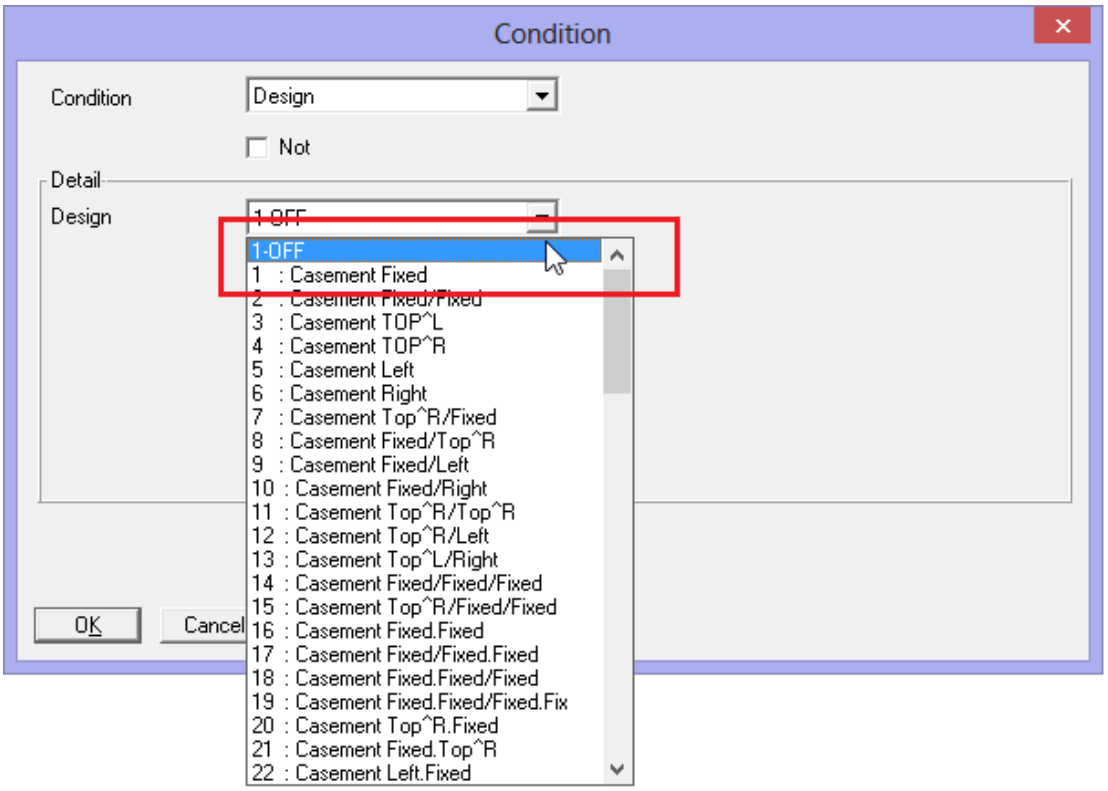


Designs

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

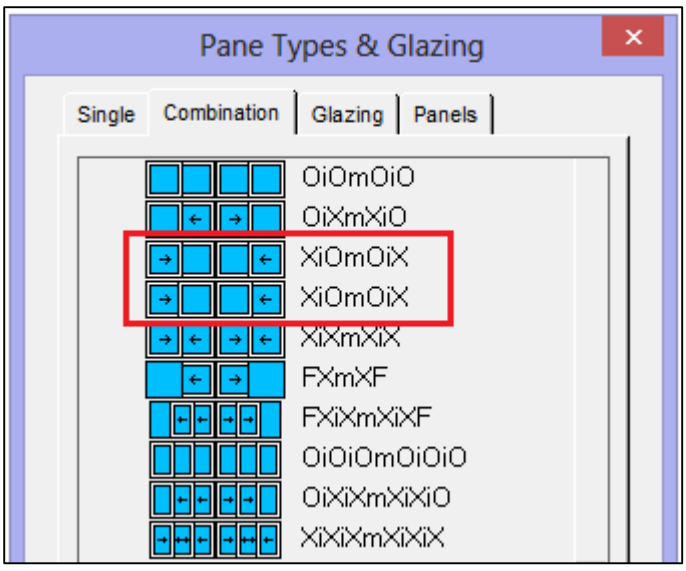
Testing 1-OFF designs in Rules

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



New Combination Pane Types

New combination Pane Type 'XiOmOiX' is now available.



Costing/Pricing Mark-up

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

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

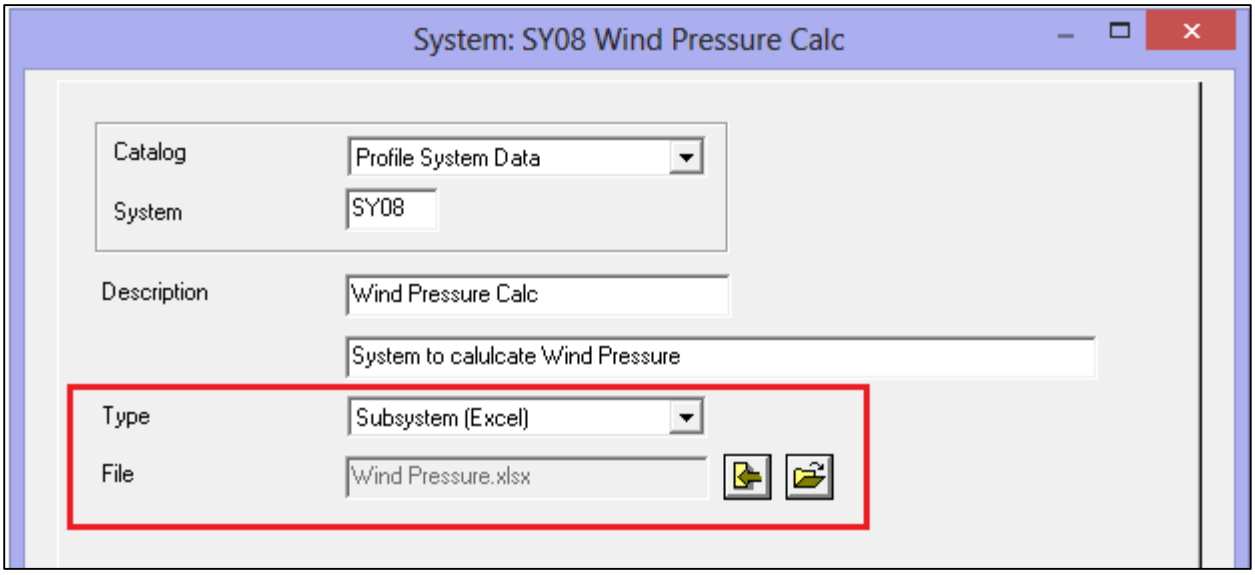
New Options

Excel-based Rules

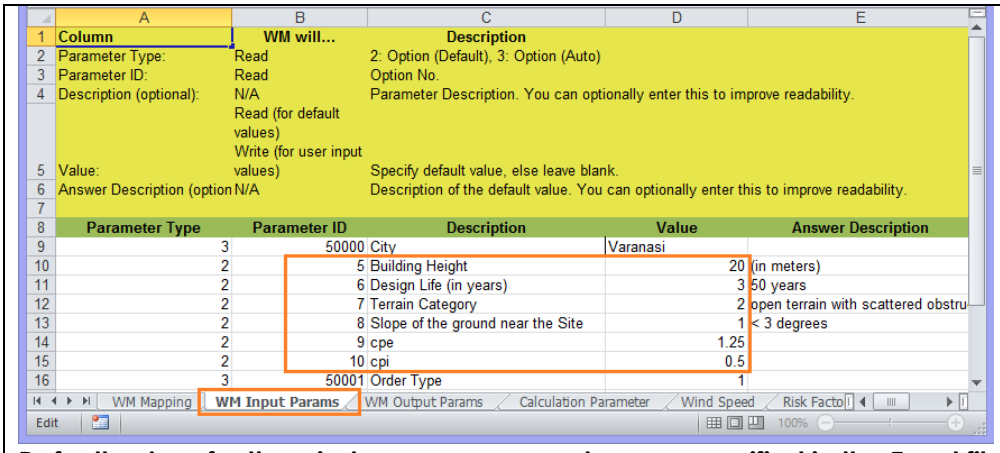
Windowmaker now supports MS Excel based Subsystems.
In this the rules for calculation are specified in a MS Excel file instead of Windowmaker.
When called,

- The required parameters are written to the Excel file
- The calculation is done using these
- 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.



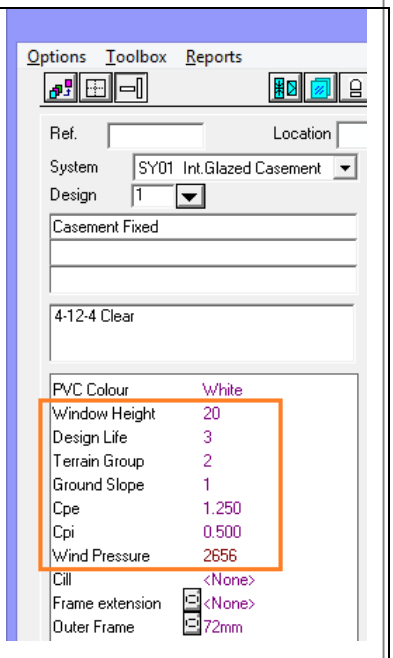
Example:
Excel sub-system can be set-up to calculate value of Wind pressure based on various parameters like wind speed, pressure coefficient, risk factor etc.

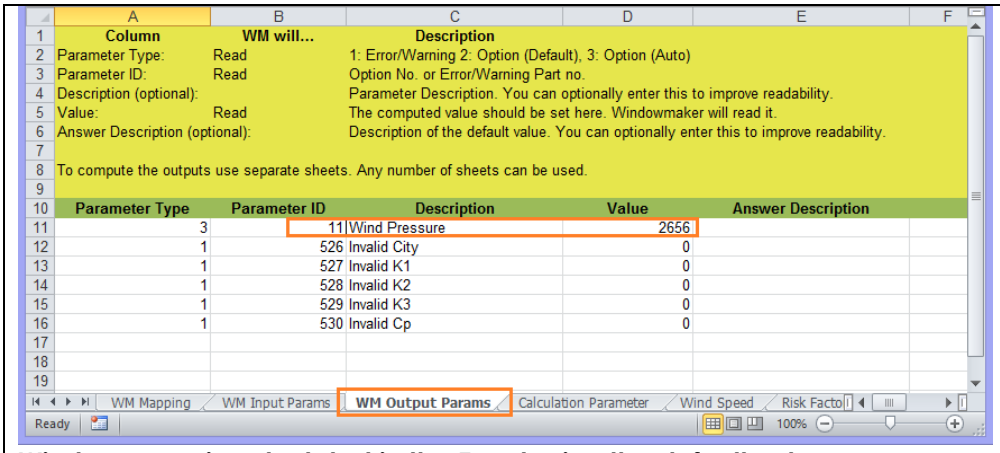
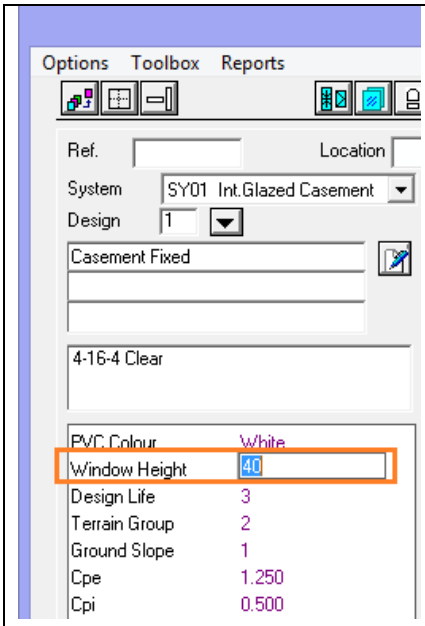
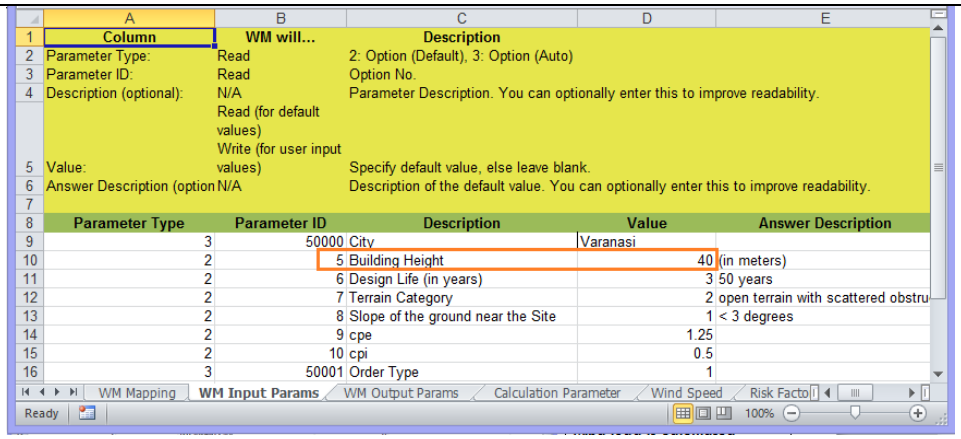
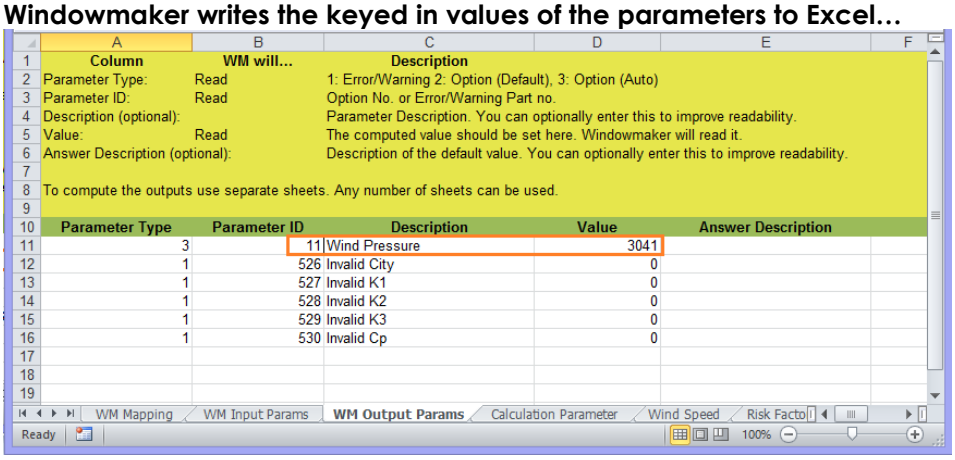
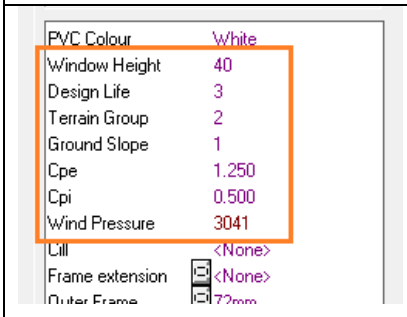


	A	B	C	D	E
1	Column	WM will...	Description		
2	Parameter Type:	Read	2: Option (Default), 3: Option (Auto)		
3	Parameter ID:	Read	Option No.		
4	Description (optional):	N/A	Parameter Description. You can optionally enter this to improve readability.		
5	Value:	Read (for default values) Write (for user input values)	Specify default value, else leave blank.		
6	Answer Description (option	N/A	Description of the default value. You can optionally enter this to improve readability.		
7					
8	Parameter Type	Parameter ID	Description	Value	Answer Description
9	3	50000	City	Varanasi	
10	2	5	Building Height	20	(in meters)
11	2	6	Design Life (in years)	3	50 years
12	2	7	Terrain Category	2	open terrain with scattered obstru
13	2	8	Slope of the ground near the Site	1	< 3 degrees
14	2	9	cpe	1.25	
15	2	10	cpi	0.5	
16	3	50001	Order Type	1	

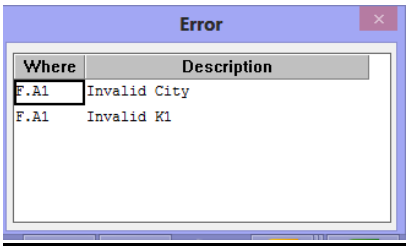
WM Mapping | WM Input Params | WM Output Params | Calculation Parameter | Wind Speed | Risk Facto

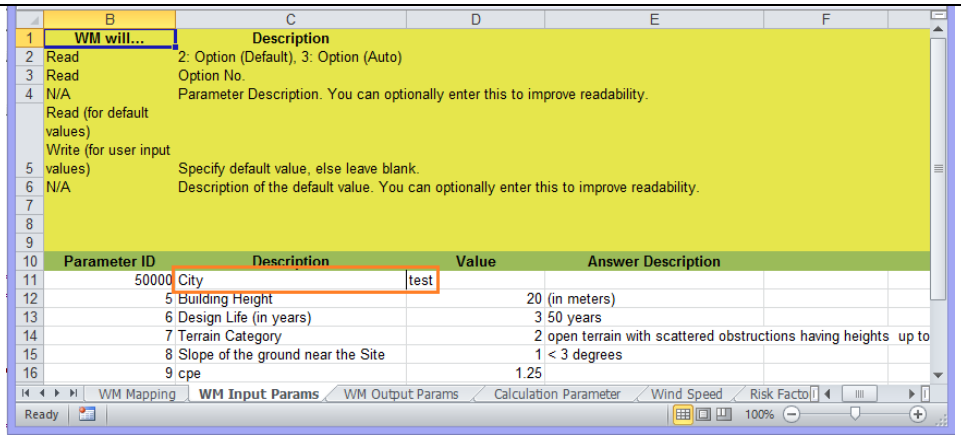
Default values for the wind pressure parameters are specified in the Excel file.

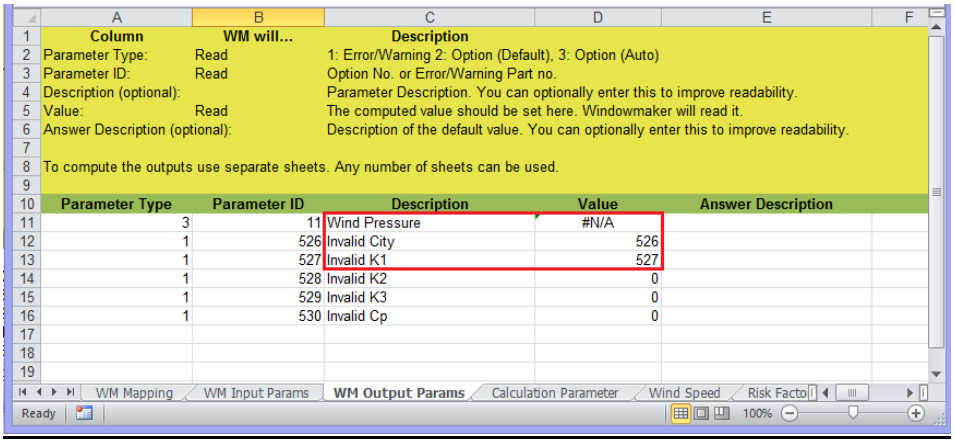


 **Wind pressure is calculated in the Excel using the default values.**	**For a new Sales Line the wind pressure is calculated using the default values.**
 **Update any parameter affecting wind pressure calculation**	 **Windowmaker writes the keyed in values of the parameters to Excel…**  **…and calculates the wind pressure accordingly**
 **The calculated value is read by Windowmaker and can be used to test in further**	**…or returns an error**

calculations OR the error is displayed







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

Click here 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.

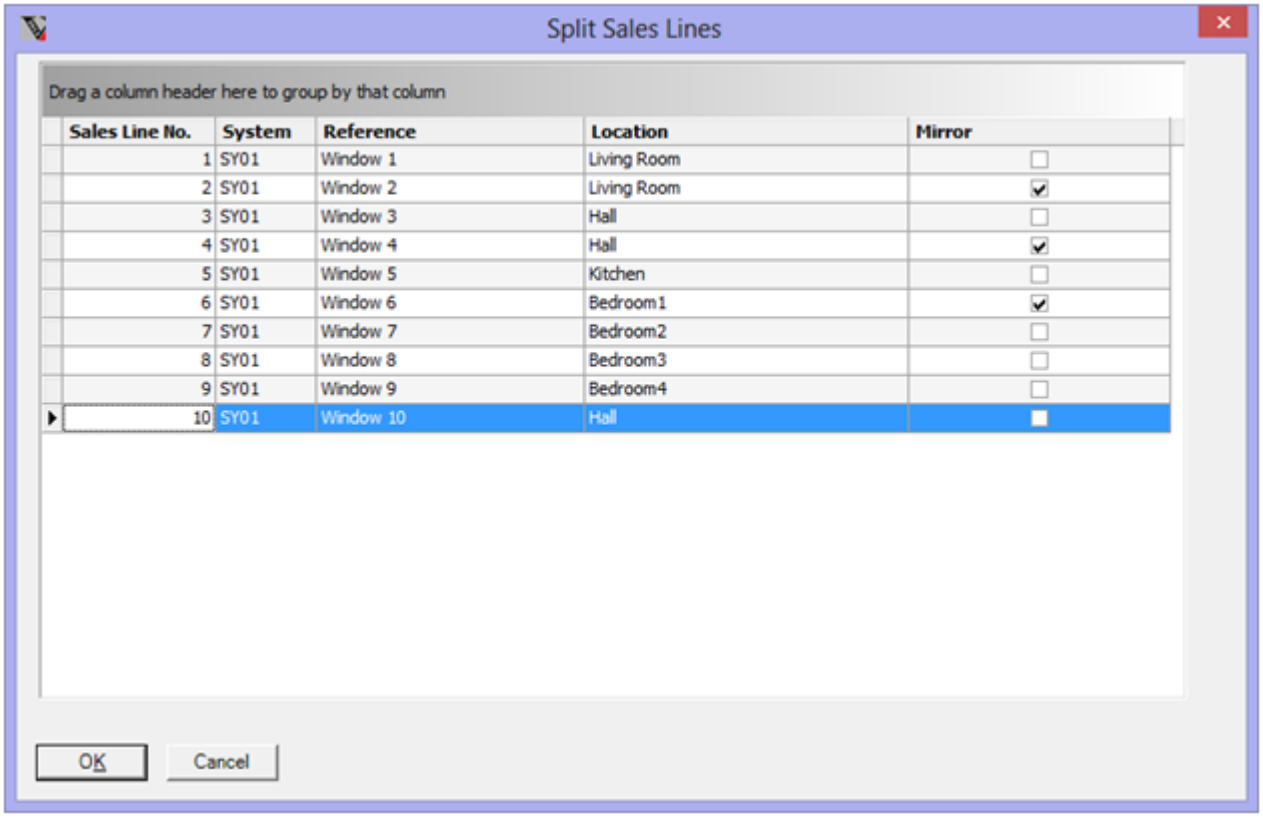
Survey milestone status
It is now possible to designate status corresponding to 'Under Survey' and 'Survey Complete'.

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



Survey Sheet

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

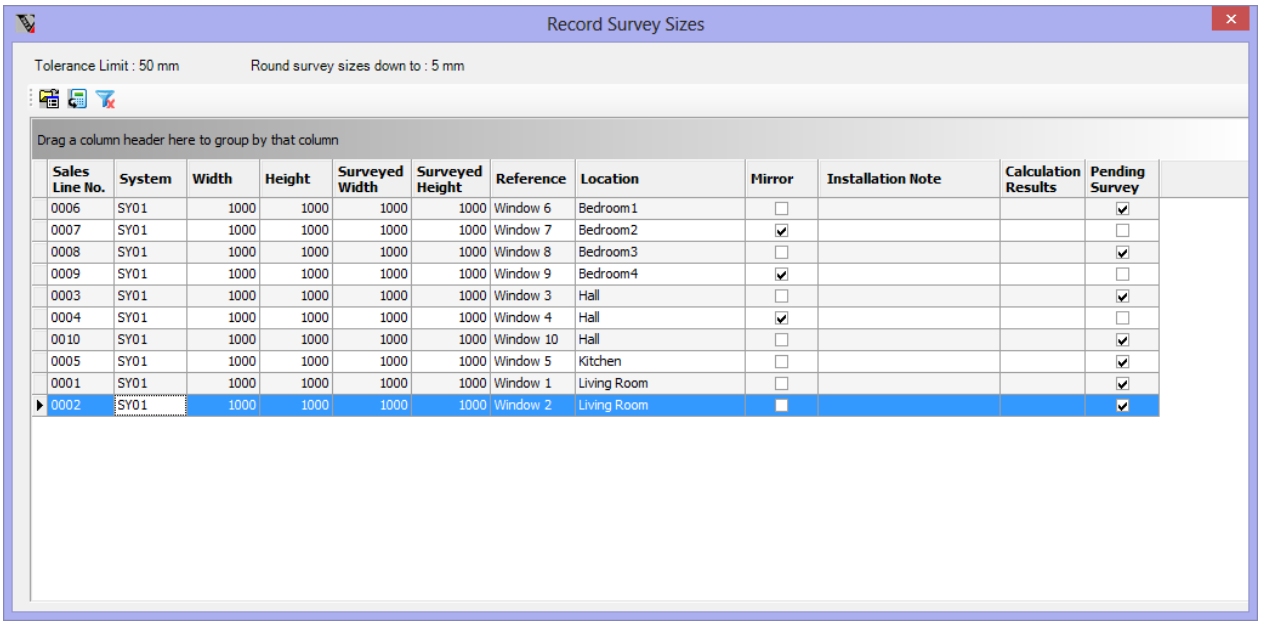
- Include and record details for each hole in the wall
- List the Sales Lines in sequence in which these might actually be surveyed. For this the Sales Lines will be listed in ascending order of Location. This requires that the Location for each hole in the wall is entered sensibly.

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:

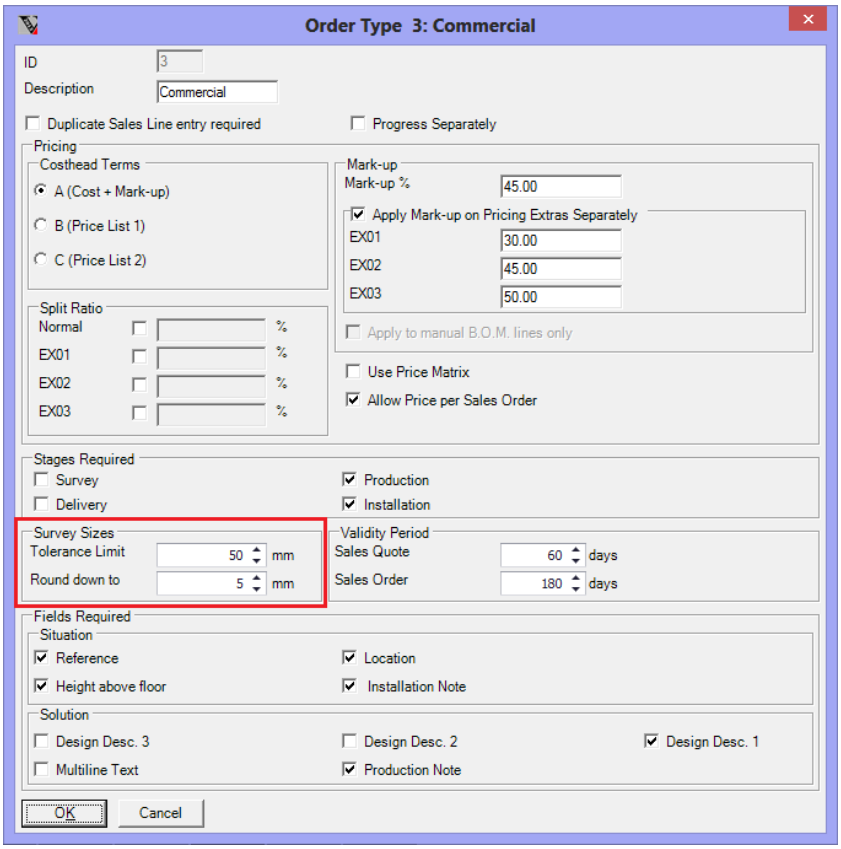
- Enter the survey sizes.
- Round the survey sizes down by an adjustment (This allows multiple windows to be manufactured for the same size rather than individually with minor size differences. It also makes it easier to match windows with the correct hole during installation.)
- Update Reference/Location,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



Sales Line No.	System	Width	Height	Surveyed Width	Surveyed Height	Reference	Location	Mirror	Installation Note	Calculation Results	Pending Survey
0006	SY01	1000	1000	1000	1000	Window 6	Bedroom1	☐			☑
0007	SY01	1000	1000	1000	1000	Window 7	Bedroom2	☑			☐
0008	SY01	1000	1000	1000	1000	Window 8	Bedroom3	☐			☑
0009	SY01	1000	1000	1000	1000	Window 9	Bedroom4	☑			☐
0003	SY01	1000	1000	1000	1000	Window 3	Hall	☐			☑
0004	SY01	1000	1000	1000	1000	Window 4	Hall	☑			☐
0010	SY01	1000	1000	1000	1000	Window 10	Hall	☐			☑
0005	SY01	1000	1000	1000	1000	Window 5	Kitchen	☐			☑
0001	SY01	1000	1000	1000	1000	Window 1	Living Room	☐			☑
0002	SY01	1000	1000	1000	1000	Window 2	Living Room	☐			☑

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.

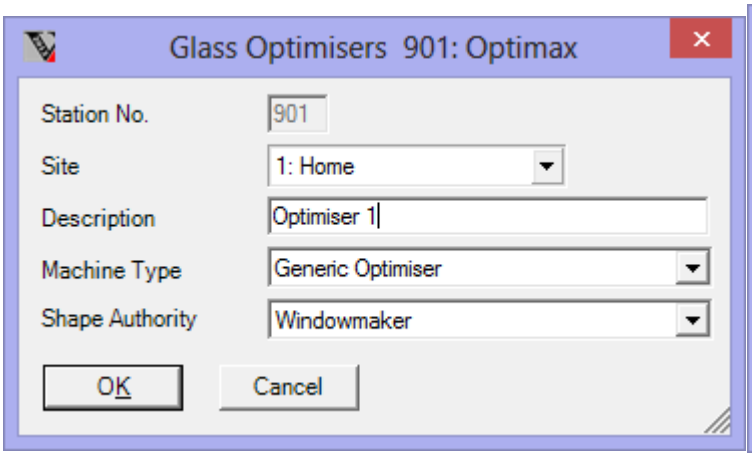


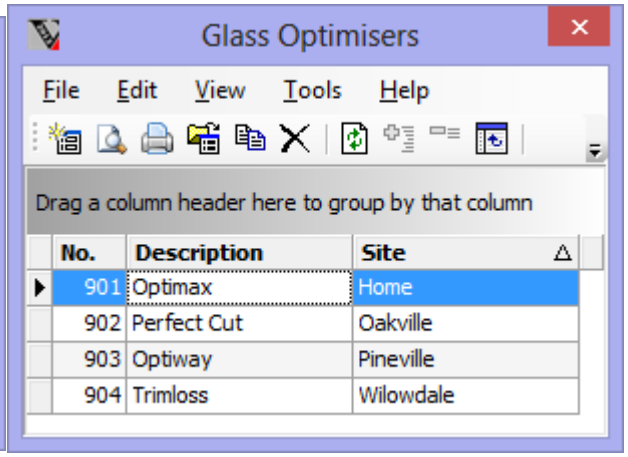
Note: These features are only available if module data is migrated to database. See **'How to know whether module data is migrated to database or not'** topic in the Help file.

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.



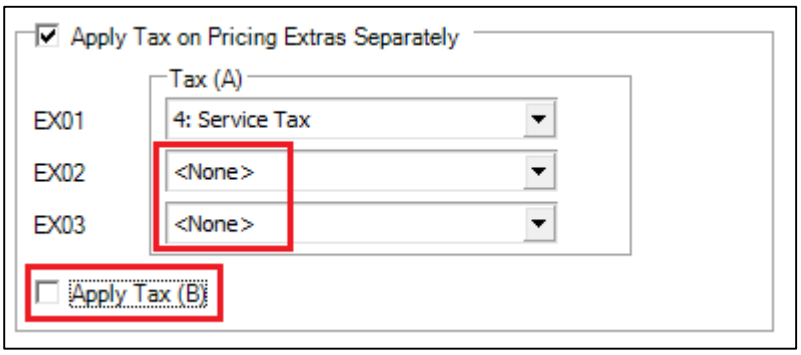


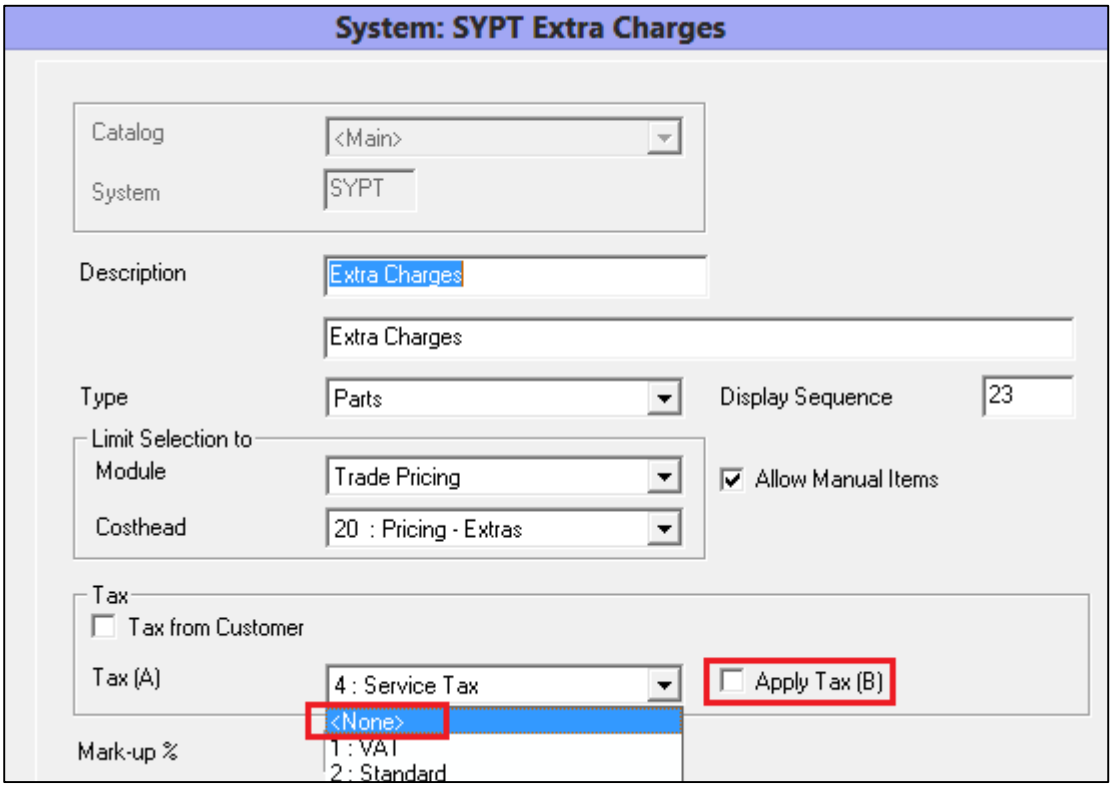
Enhancement to Options

Pricing Extras

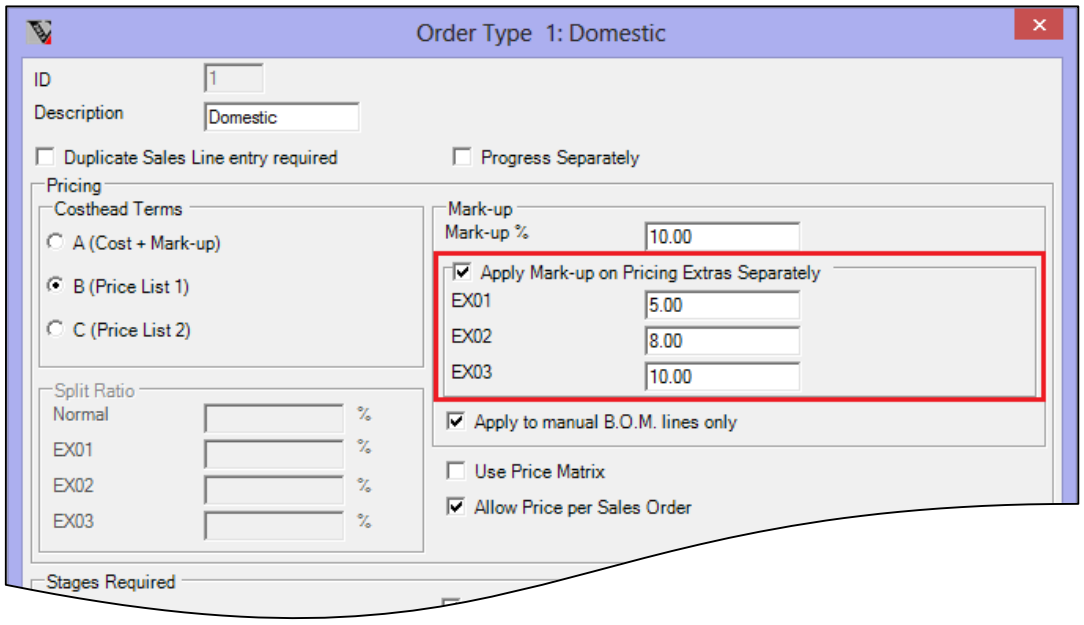
Exempting from Taxation
It is now possible to exempt Pricing Extras (e.g. transport, lead and lift charges) from taxation.
This can be specified in:

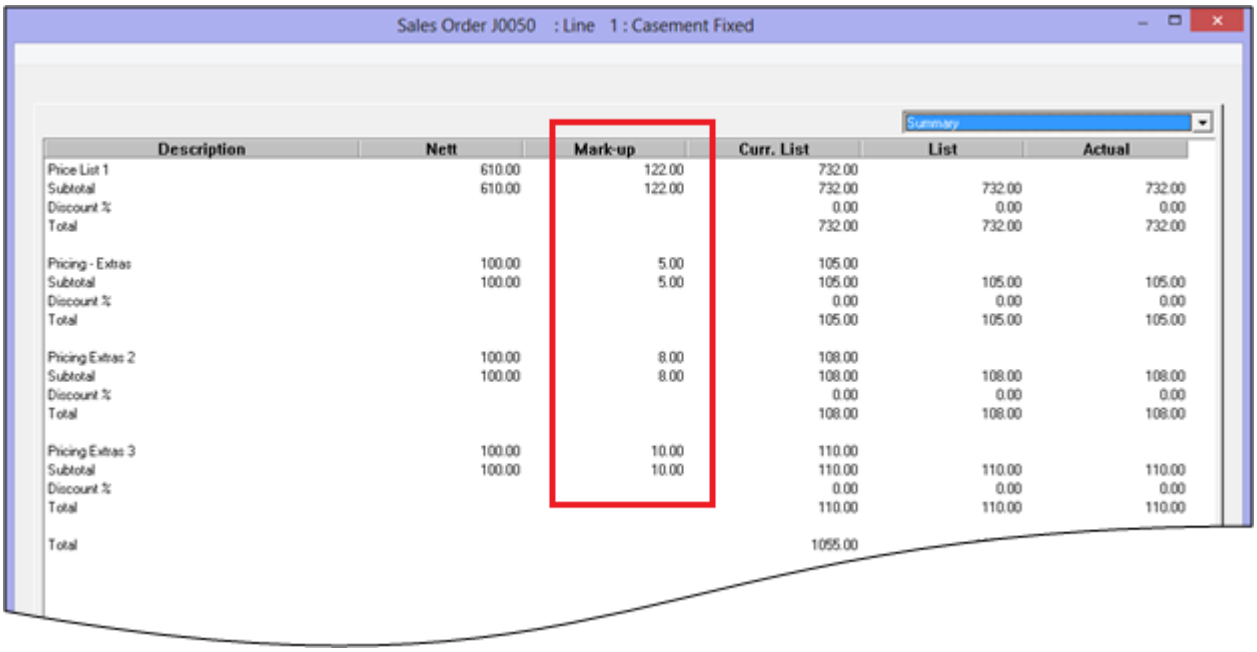
- Application Settings →Sales → Sales Header
- Part Systems (if Tax from System)





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.



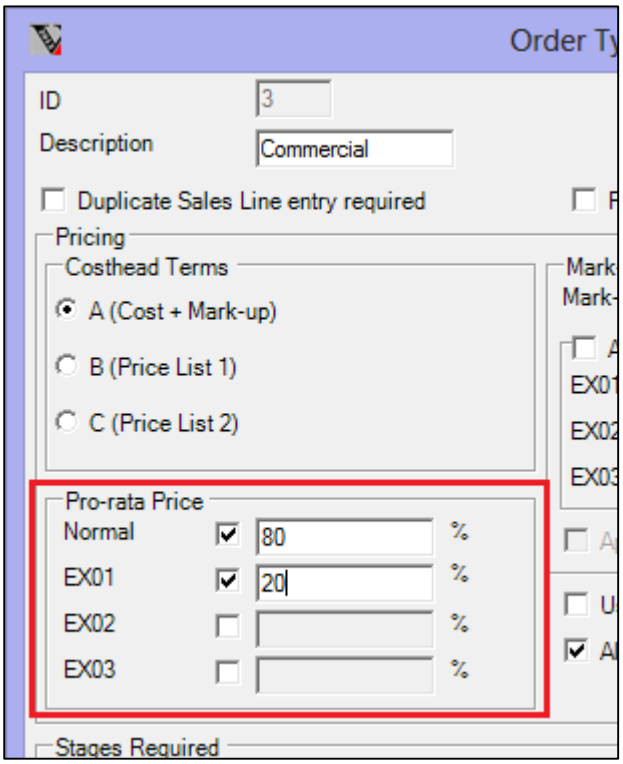


Sales Header Pricing Page - Calculating 'Pricing – Extras' with Mark-ups Specified on the Order Type.

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.



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

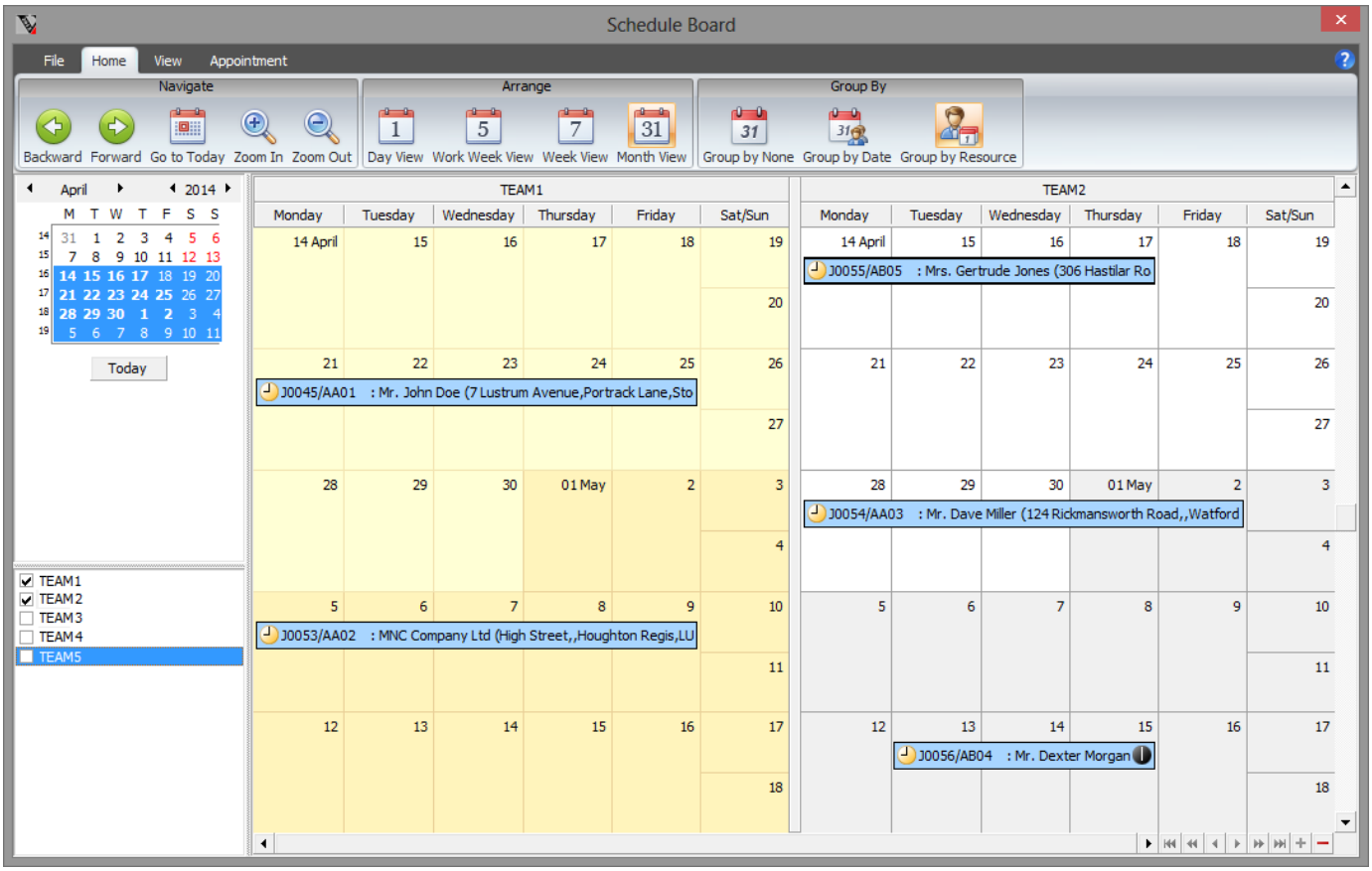
Installation Scheduling

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



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.

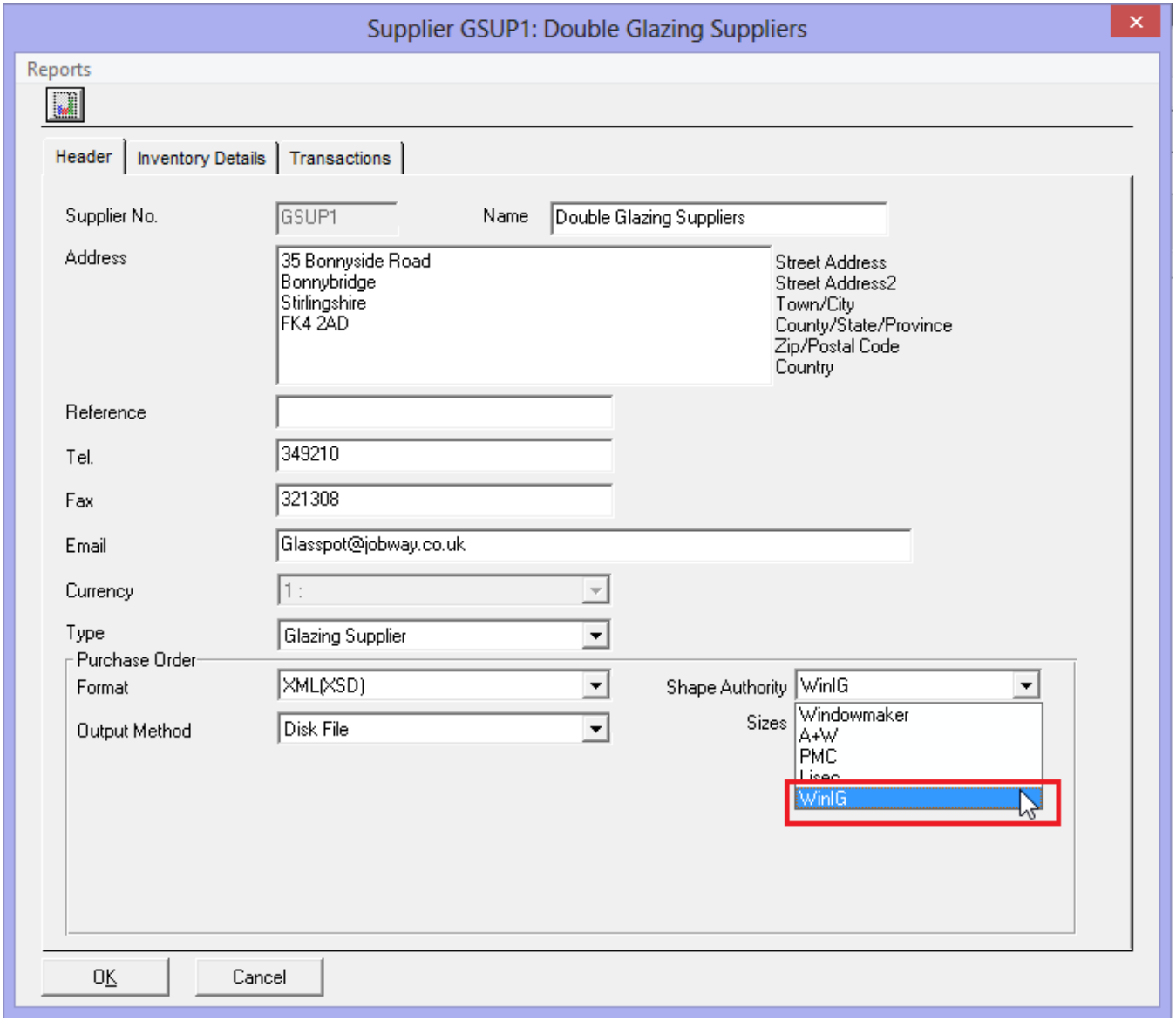
Link to Glass Optimisers

Windowmaker can now link to the following glass optimisers:

- Aculite
- WinIG

Glass Purchase

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



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.

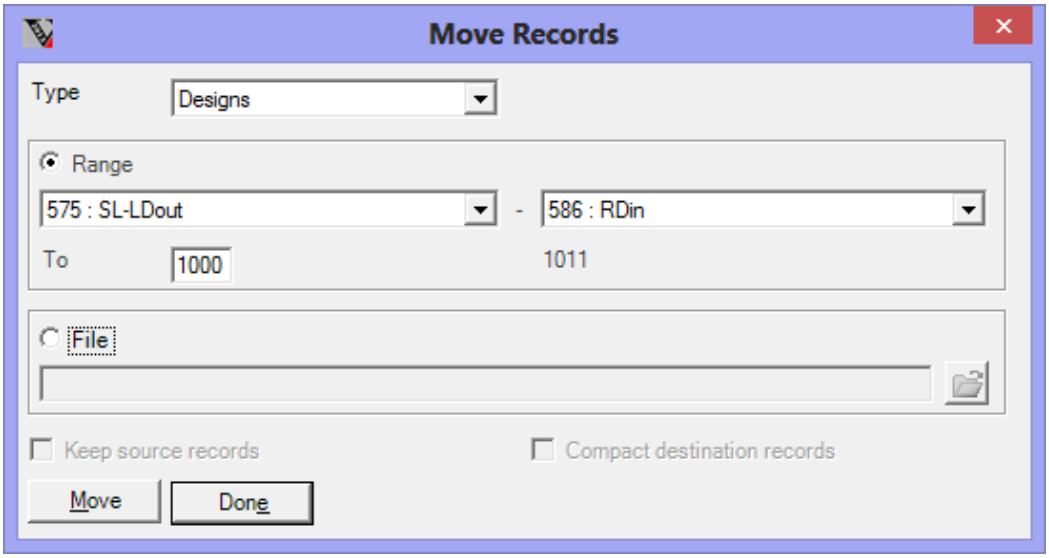
Refer help topic 'How to use optimised costing/pricing' for more details.

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

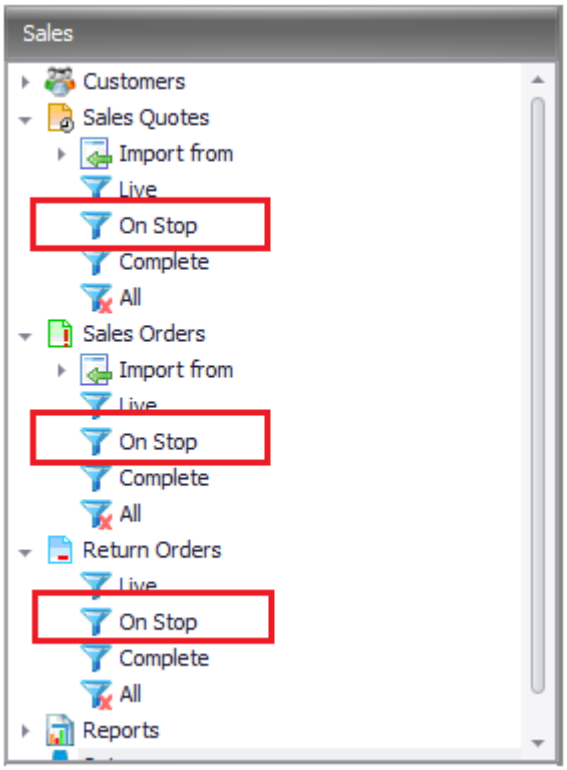
It is now possible to renumber Design records using the 'Move Records' facility.



Enhancement to Products

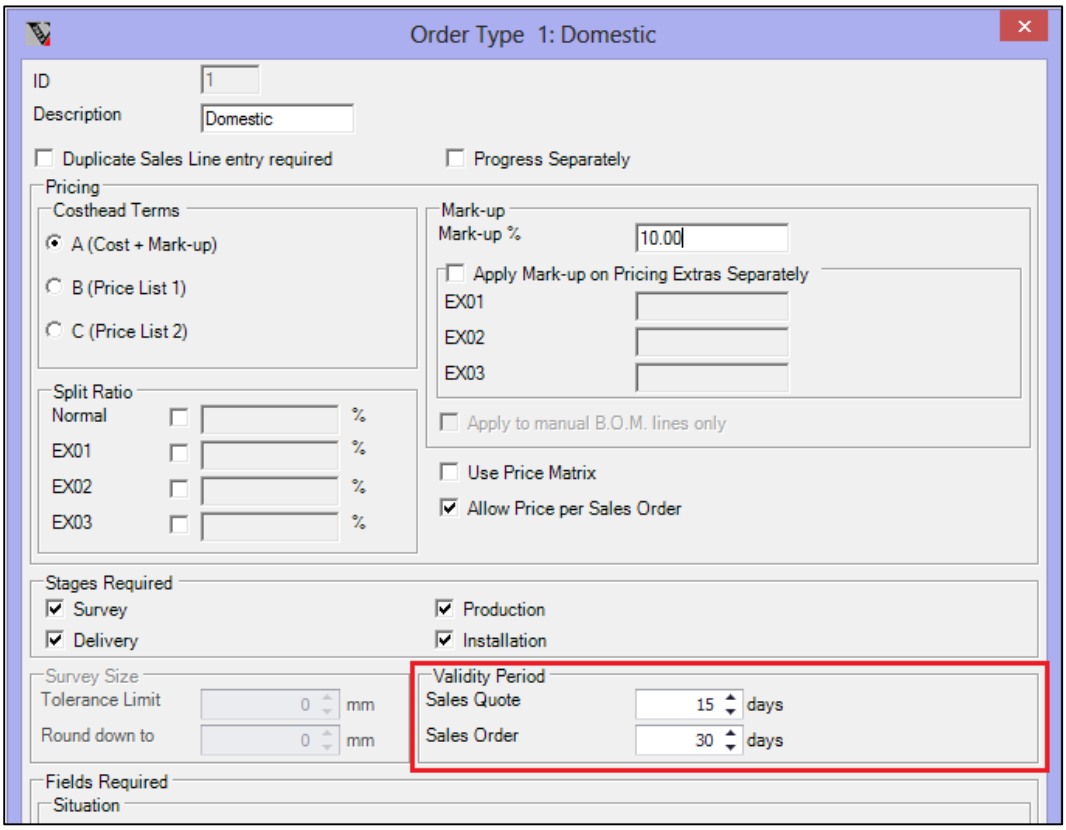
Windowmaker SQL

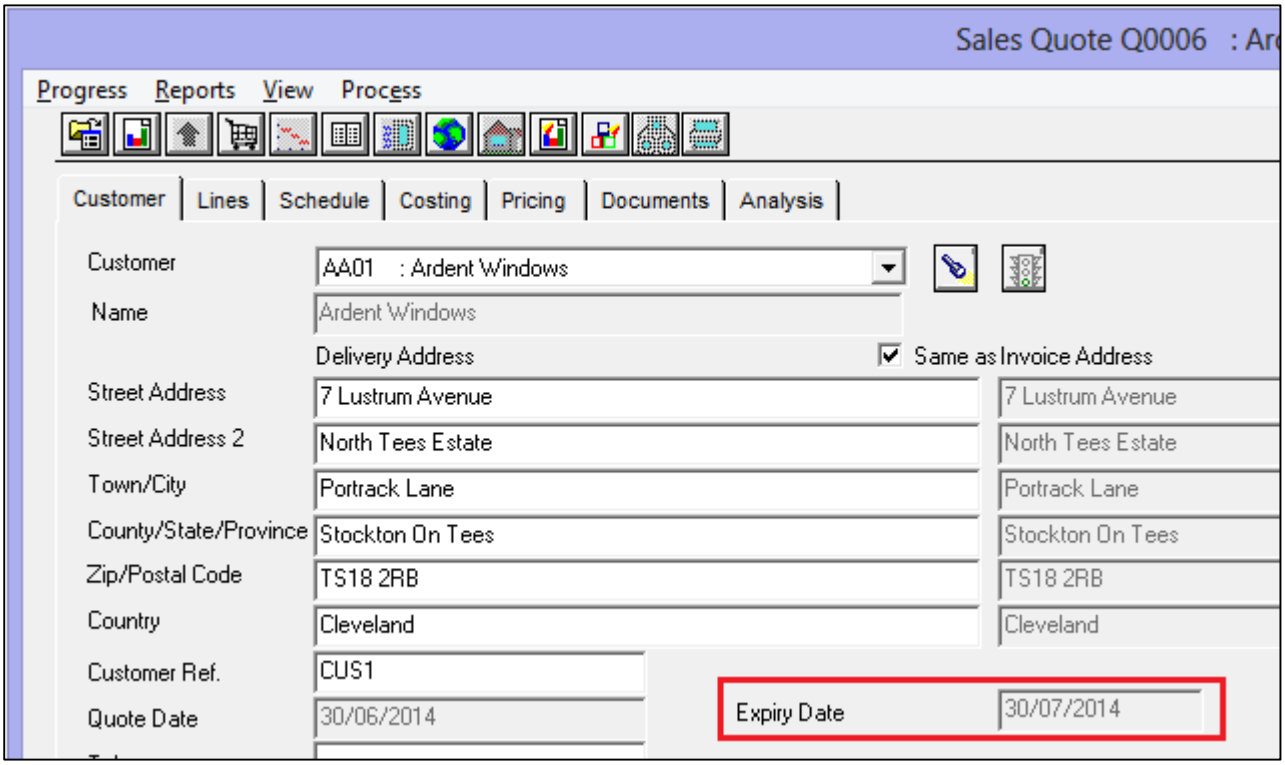
Sales Header On Stop
A Sales Quote/Order can now be put 'On Stop'.
An 'On Stop' Sales Quote/Order cannot be modified. No reports can be run on it.
All such Sales Quotes/Orders are listed in the respective 'On Stop' views.
The 'On Stop' state can be reset.



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.


Order Type 1: Domestic
ID
1
Description
Domestic
Duplicate Sales Line entry required
Progress Separately
Pricing
Costhead Terms
A (Cost + Mark-up)
B (Price List 1)
C (Price List 2)
Mark-up
Mark-up %
10.00
Apply Mark-up on Pricing Extras Separately
EX01
EX02
EX03
Split Ratio
Normal
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
Round down to
mm
Validity Period
Sales Quote
15
days
Sales Order
30
days
Fields Required
Situation


Sales Quote Q0006 : Ar
Progress
Reports
View
Process
Customer
Lines
Schedule
Costing
Pricing
Documents
Analysis
Customer
AA01 : Ardent Windows
Name
Ardent Windows
Delivery Address
Same as Invoice Address
Street Address
7 Lustrum Avenue
Street Address 2
North Tees Estate
Town/City
Portrack Lane
County/State/Province
Stockton On Tees
Zip/Postal Code
TS18 2RB
Country
Cleveland
Customer Ref.
CUS1
Quote Date
30/06/2014
Expiry Date
30/07/2014

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 Windowmaker Alu-Litewebpage for more details. Click here to request a demo on Windowmaker Alu-Lite.

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

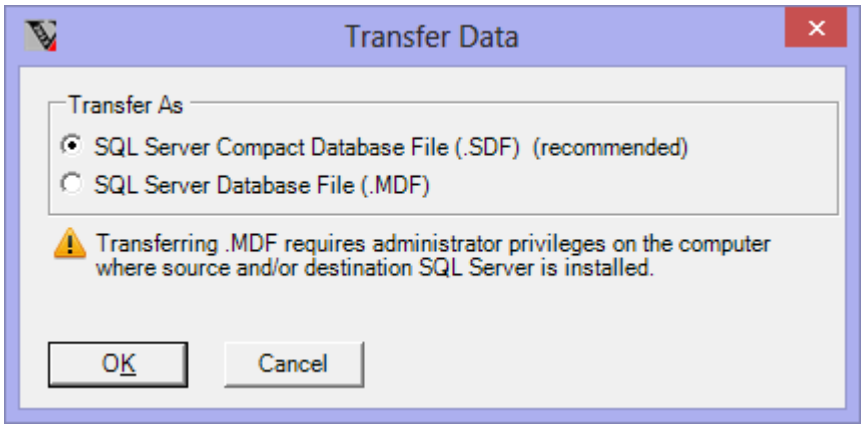
Data Transfer

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 SQL Server Compact (.SDF) 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).

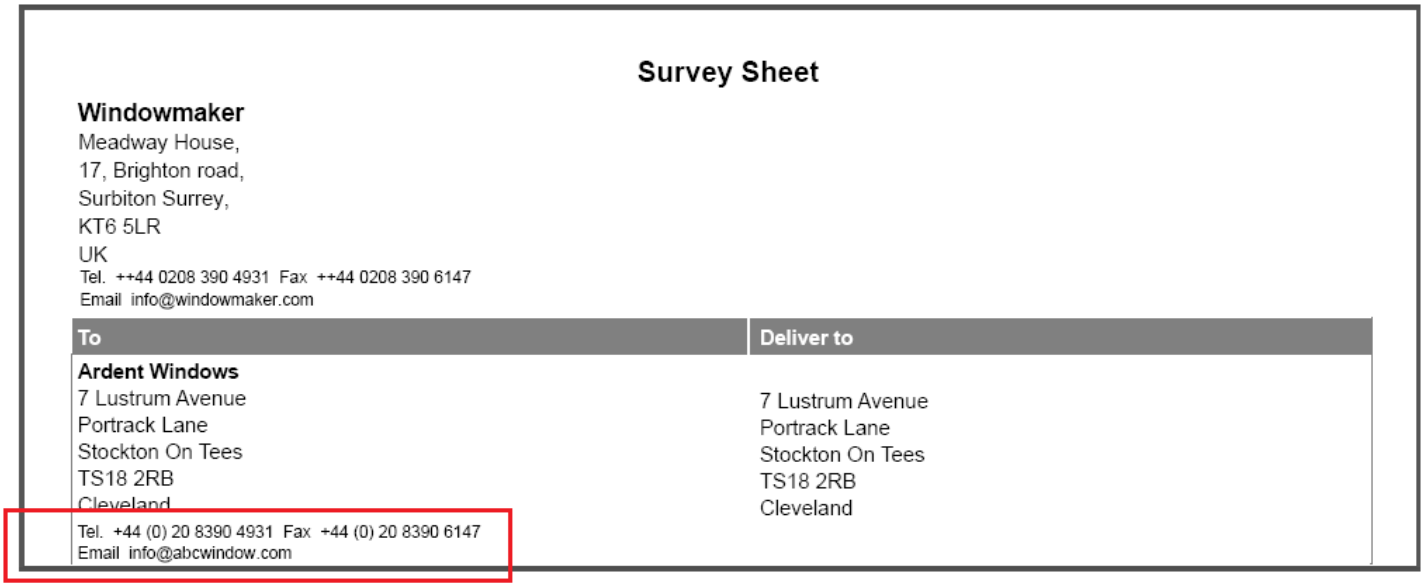


Select between the two formats while transferring data

Refer 'How to transfer data' help topic for more details.

Survey Sheet

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

To	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

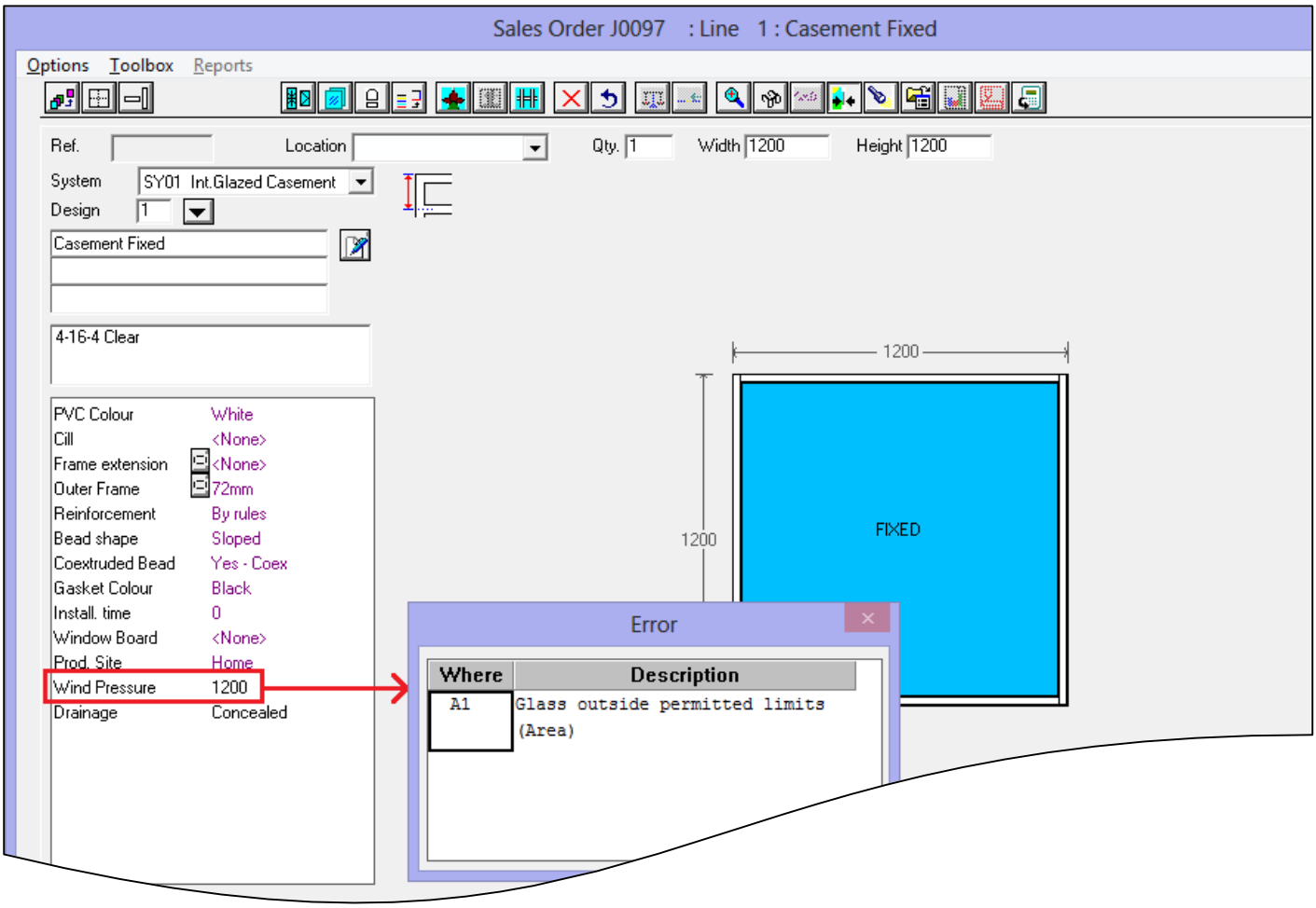
Windowmaker now supports running on Windows 8.1 operating system.

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.

- Stock Control
- Production Scheduling
- Purchase Scheduling
- Delivery Scheduling
- Installation scheduling
- Sub-Batching
- Bar Optimization
- Tracking

Windowmaker 2012 R3.2/R3.3

Pre-requisites for Upgrading

Please refer to the Release Notes, 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 What's New and Release Notes documents on our website.

General Enhancements

Order Acknowledgment

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

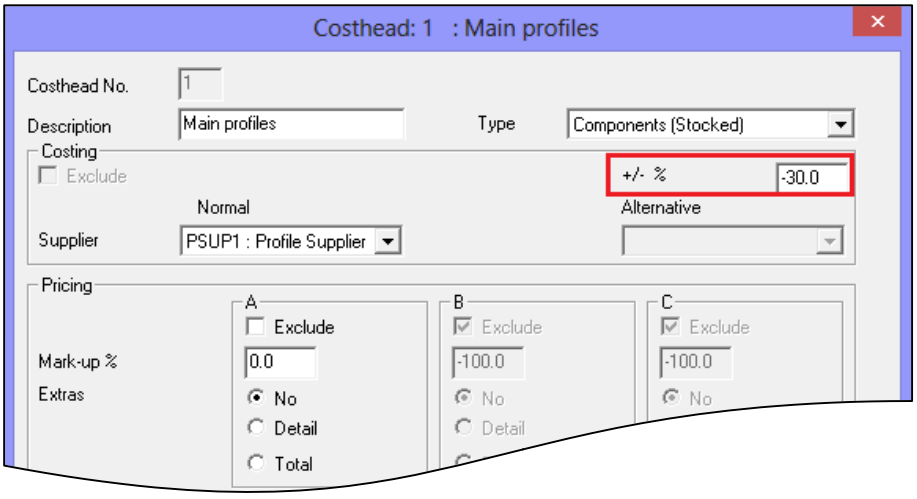
Invoice

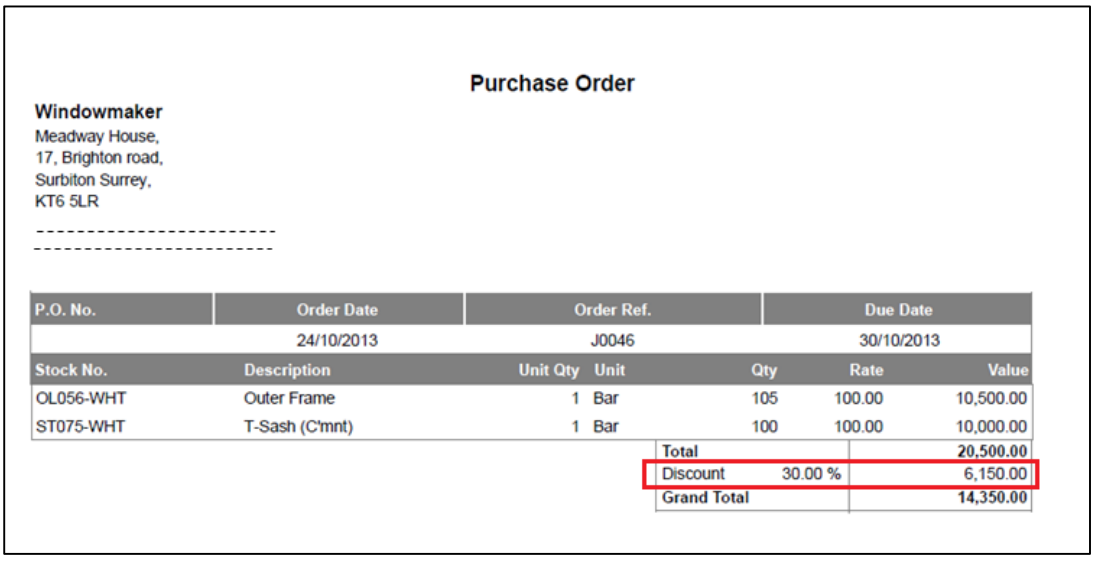
This is now enhanced to print

- 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:





Purchase Order

Windowmaker
Meadway House,
17, Brighton road,
Surbiton Surrey,
KT6 5LR

P.O. No.	Order Date	Order Ref.	Due Date
	24/10/2013	J0046	30/10/2013

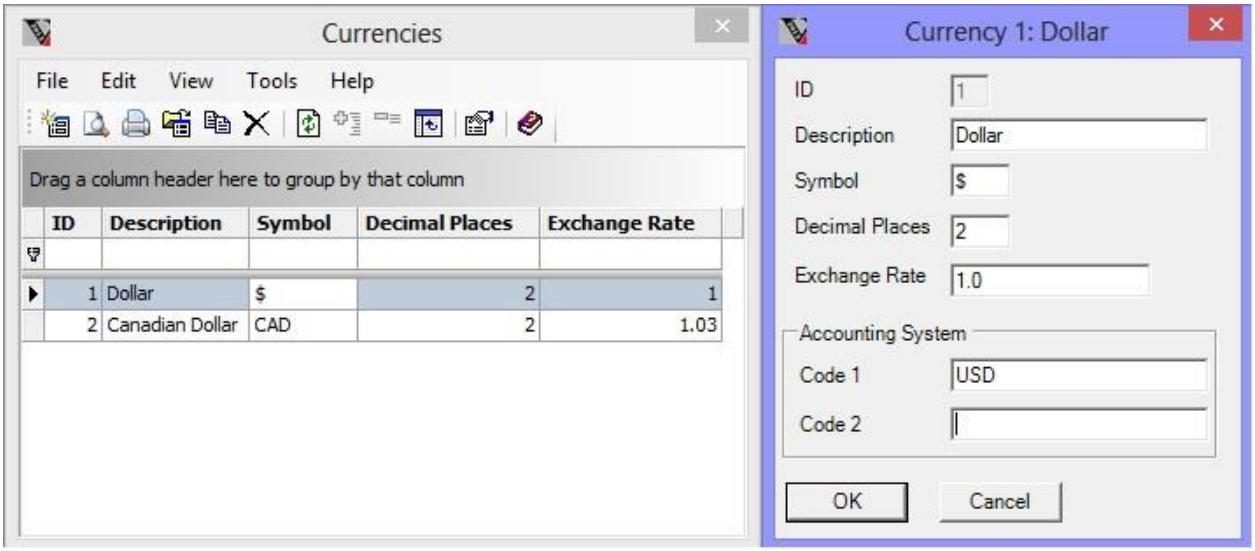
Stock No.	Description	Unit Qty	Unit	Qty	Rate	Value
OL056-WHT	Outer Frame	1	Bar	105	100.00	10,500.00
ST075-WHT	T-Sash (C'mnt)	1	Bar	100	100.00	10,000.00

Total		20,500.00
Discount	30.00 %	6,150.00
Grand Total		14,350.00

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

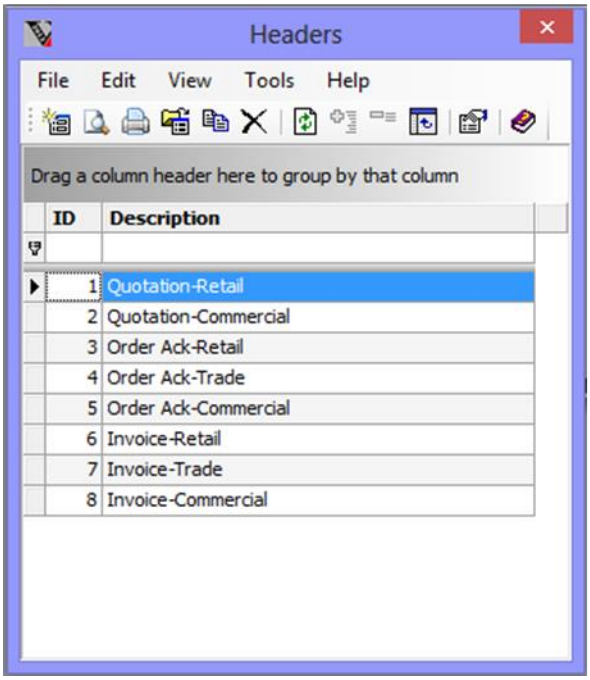
For a currency, you can now specify
- Description of up to 20 characters.
- A currency symbol of up to 3 characters (e.g. $, CAD, £, €, ₹ etc.). If specified, the symbol is output on customer documents and sales analysis reports. If no symbol is specified for the 'home' currency, then it uses the currency 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).

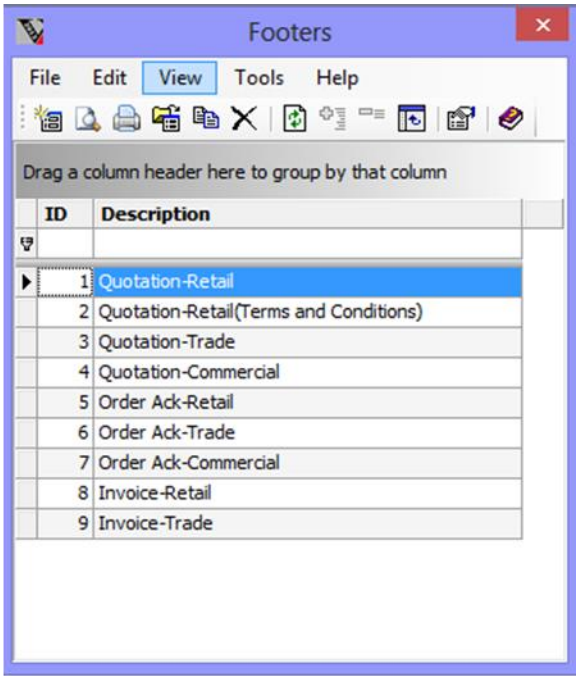


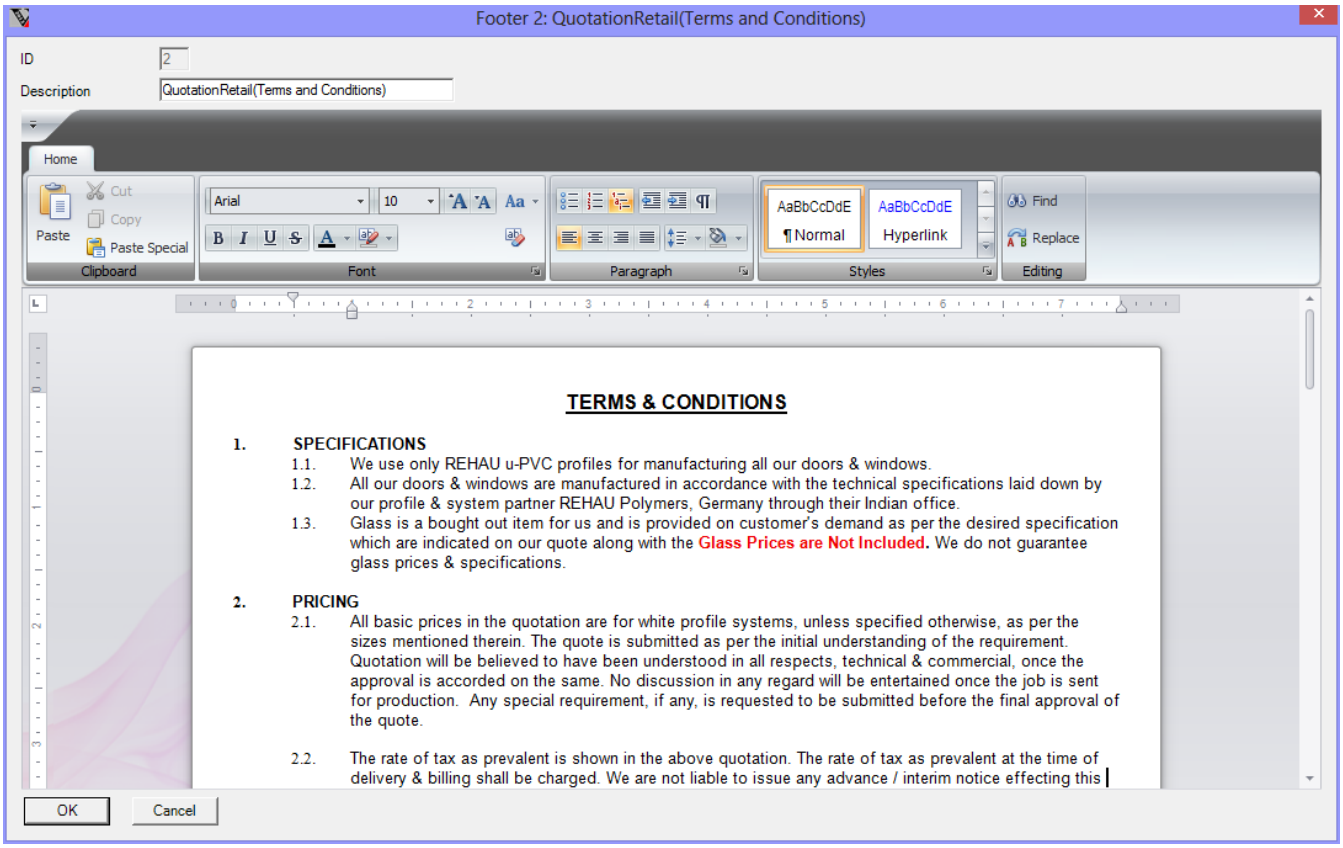
Document Headers/Footers

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.







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.

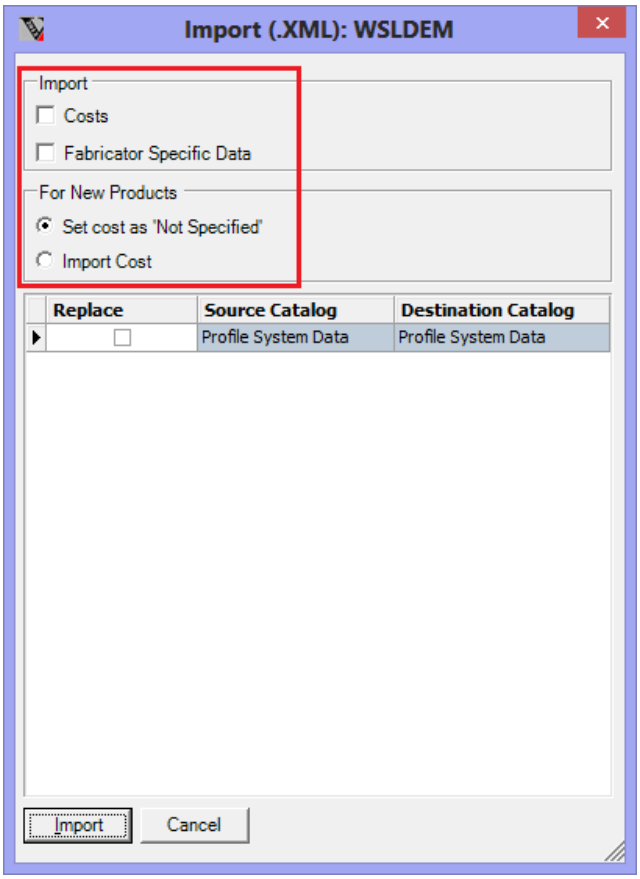
Parts – Cost 'not specified'

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.



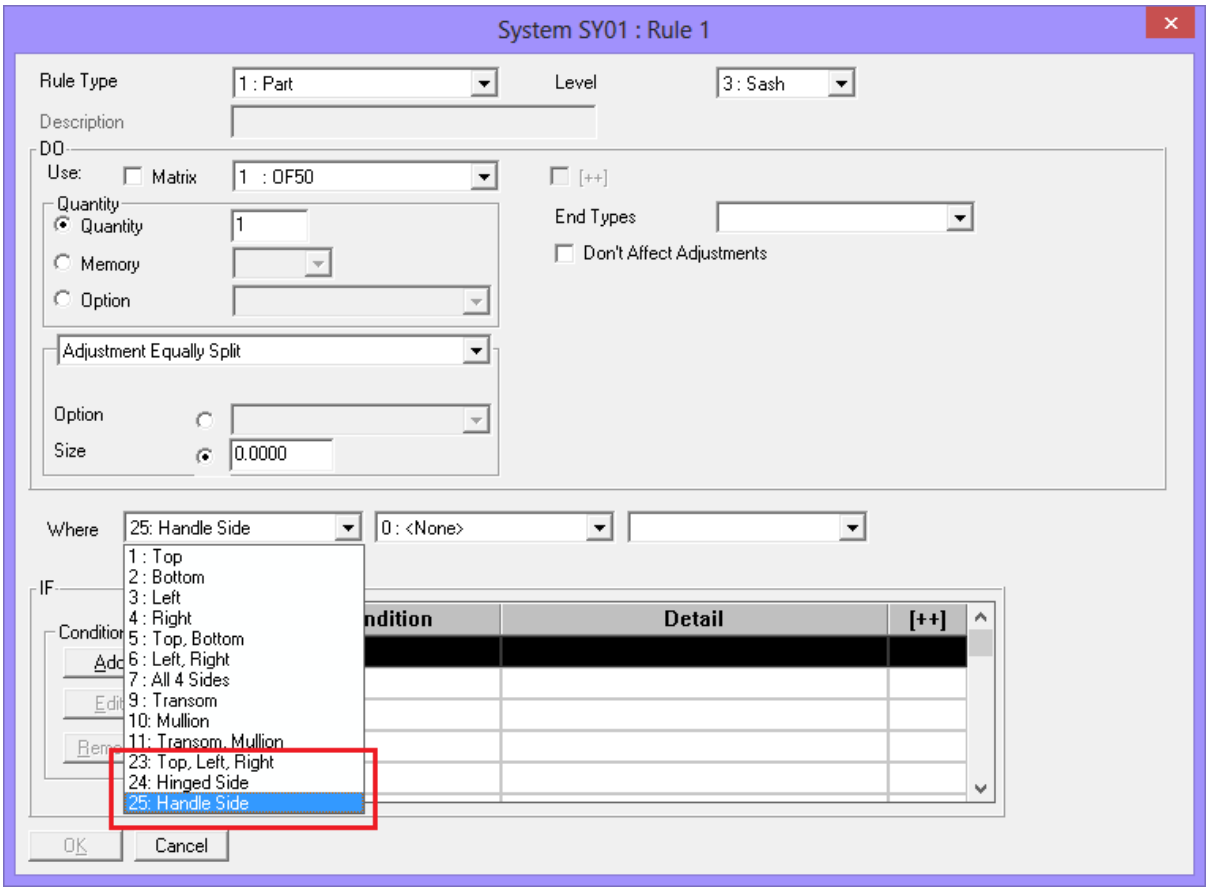
'Unused' parts list

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 Detail…	…in a rule at level(s)…	Note
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.



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.

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 info@windowmaker.com 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.

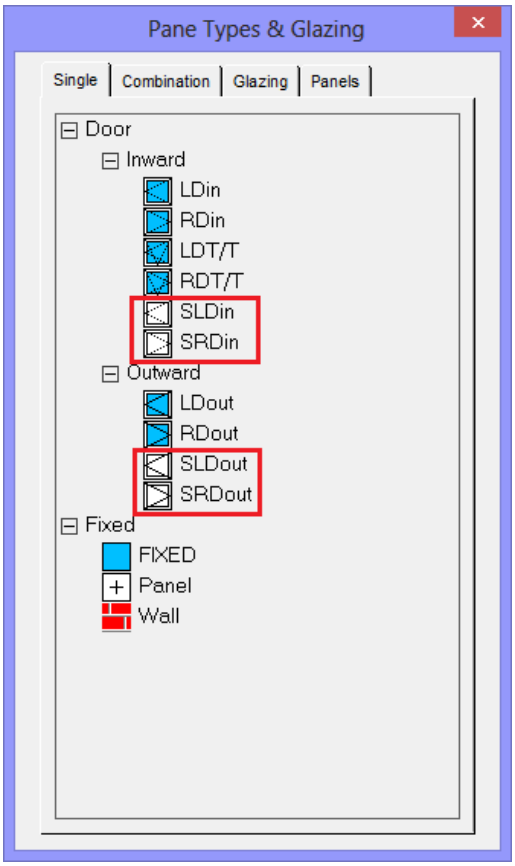
A Price Matrix is essentially a price list for a particular product configuration. In future, all the Price Matrices will be converted to products costed using a cost matrix.

New Pane Type Classes for door slabs

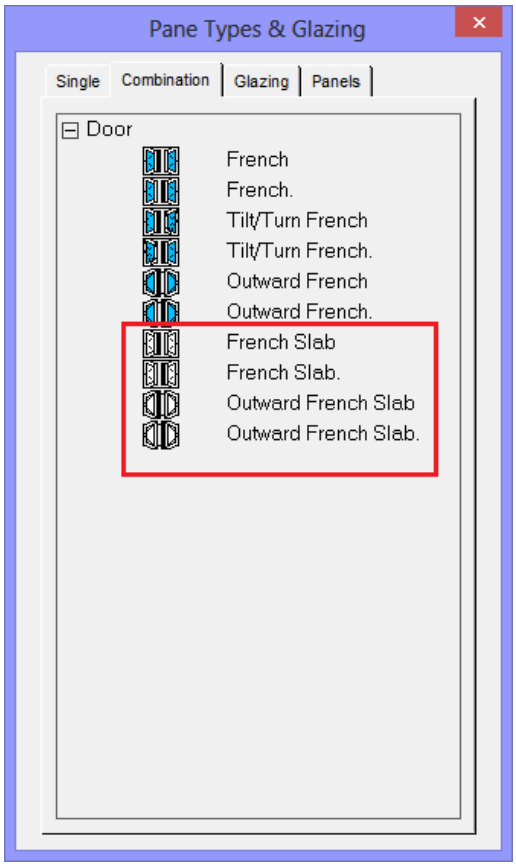
It is now possible to create Pane Types suitable to door slabs using the following new Pane Type Classes:
- Slab Door (Inward)
- Slab Door (Outward)
- Slab Door Slave (Inward)
- Slab Door Slave (Outward)

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



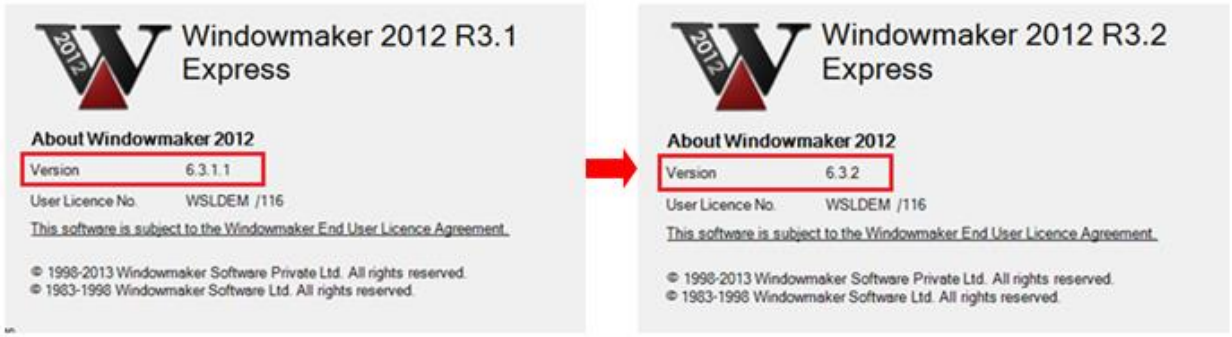
For Combination Pane Type

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.

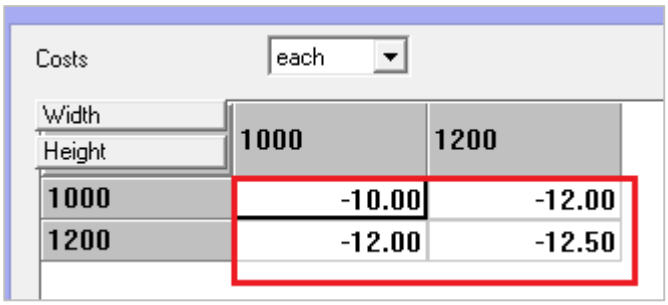


FIG 1: Cost Matrix - Setting up 'Pricing – Extras' with negative values

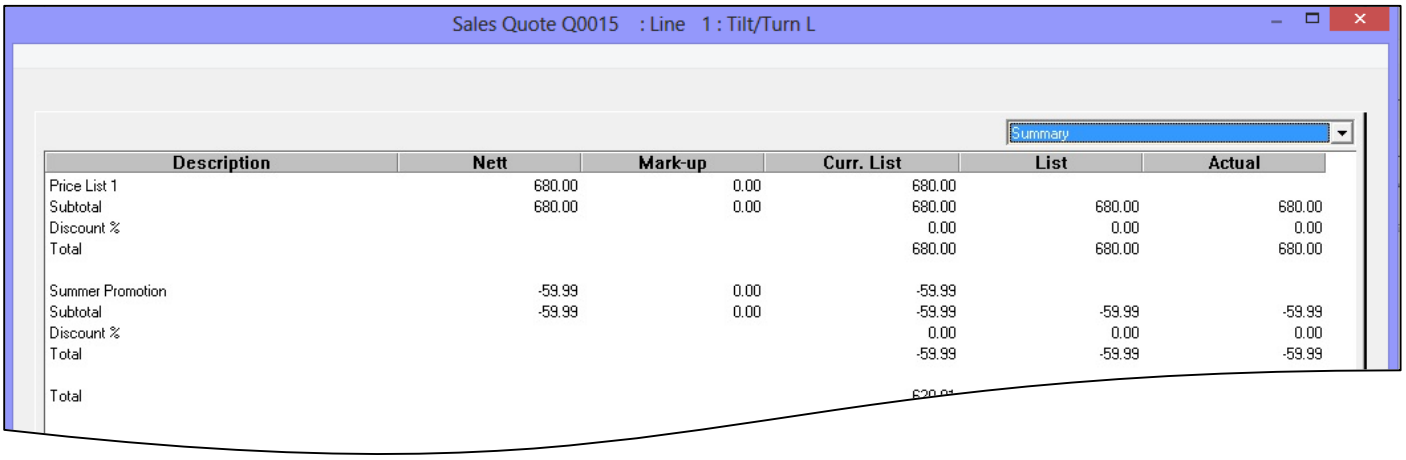


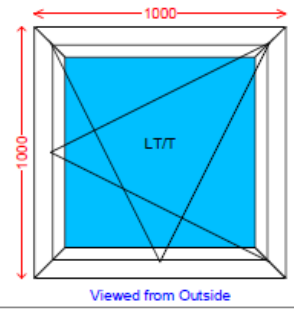
FIG 2: Sales Header Pricing Page - Calculating 'Pricing – Extras' with negative values

Windowmaker Windows
Unit A - 115,
Wolseley Street
Toronto
ON M6J 1K1
Canada
Tel. +1 (416) 762 5299 Fax +1 (416) 946 1467
Email info@windowmaker.com

Quotation

To	Deliver to
Mr. John Doe Block A - Window Street Toronto ON N6A 1K2 Canada	Block A - Window Street Toronto ON N6A 1K2 Canada

Quote No.	Date	Customer Ref.	Responsible
Q0015	9/25/2013		SUPERVISOR

Sales Line	Details	Qty	Rate	Amount
0001	 Tilt/Turn L 1000w x 1000h 4-16-4 Clear PVC Colour White Handle Colour White Coextruded Bead Yes - Coex **Drainage Concealed** **Summer Promotion** Summer Promotion	1 1	680.00 -59.99	680.00 -59.99

Total		**620.01**
Standard	20.00 %	124.00
Grand Total		**744.01**

FIG 3: Quotation

Optimaker

Optimaker reports are enhanced to output the Glass trolley/slot number when a Production Batch is sub-batched. 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 Release Notes, 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 website.

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 VTS 1970	Notified body VTS 1970	Notified body VTS 1970	Notified body VTS 1970
BS EN 14351-1:2006+A1:2010	**BS EN 14351-1:2006+A1:2010**	**BS EN 14351-1:2006+A1:2010**	**BS EN 14351-1:2006+A1:2010**
DoP No. 30	DoP No. 1001	DoP No. 21	DoP No. 30
AWN-002-WIN DGU-Awning-SY1 Intended use for Commercial Buildings	DIN-004-DOOR DGU-Door In-SY1 Intended use for Commercial Buildings	CAS-001-WIN DGU-casement-SY1 Intended use not on Escape Route	AWN-002-WIN DGU-Awning-SY1 Intended use for Commercial Buildings
Resistance to windload: **Class 5** Water tightness: **Class 7A** Dangerous substances: **No** Load-bearing capacity of safety devices: **350 N** Acoustic performance: **NPD** Thermal transmittance: **1.7 W/(m2.K)** Radiation properties: **NPD** Air permeability: **Class 2 (300 Pa)**	Resistance to windload: **Class A2** Water tightness: **Class 5A** Dangerous substances: **No** Load-bearing capacity of safety devices: **NPD** Acoustic performance: **NPD** Thermal transmittance: **1.7 W/(m2.K)** Radiation properties: **NPD** Air permeability: **Class 2 (300 Pa)** Ability to release: Panic H/W complies EN179	Resistance to windload: **Class 5** Water tightness: **Class 7A** Dangerous substances: **No** Load-bearing capacity of safety devices: **350 N** Acoustic performance: **NPD** Thermal transmittance: **1.7 W/(m2.K)** Radiation properties: **NPD** Air permeability: **Class 2 (300 Pa)**	Resistance to windload: **Class 5** Water tightness: **Class 7A** Dangerous substances: **No** Load-bearing capacity of safety devices: **350 N** Acoustic performance: **NPD** Thermal transmittance: **1.7 W/(m2.K)** Radiation properties: **NPD** Air permeability: **Class 2 (300 Pa)**
J00008/0001	J00008/0002	J00008/0003	J00008/0004
00000013000100	00000014000100	00000015000100	00000016000100

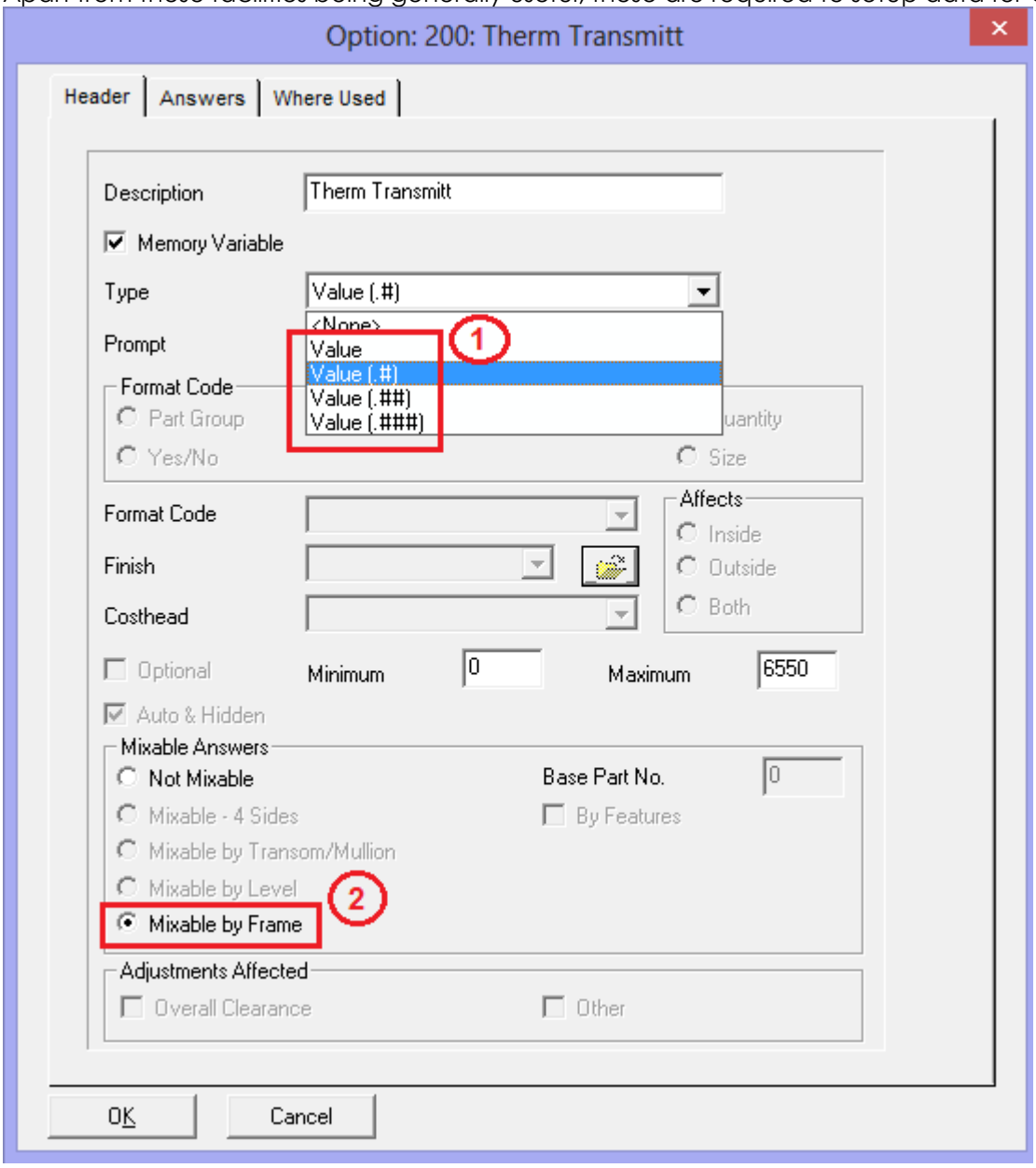
Label Size: Each Label is of size 192mm x 62mm. 4 labels per A4 sheet, to be fed in Landscape mode to the printer.
Label Stationery: Avery reference L7701

Please contact your Windowmaker supplier or write to help@windowmaker.com 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.



'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

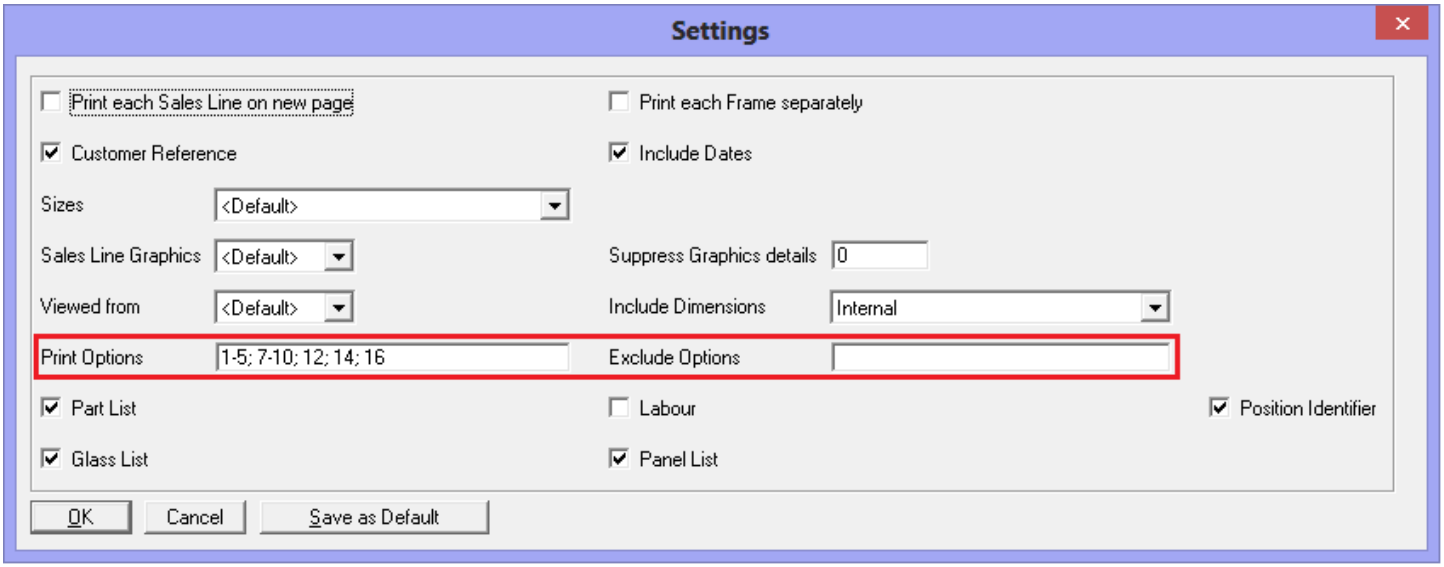
Earlier this was not possible. Hence it required all users to stop order entry or running processes in order to do even minor modifications to any setup data.

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:



Enhancements to Windowmaker ERP (NAV)

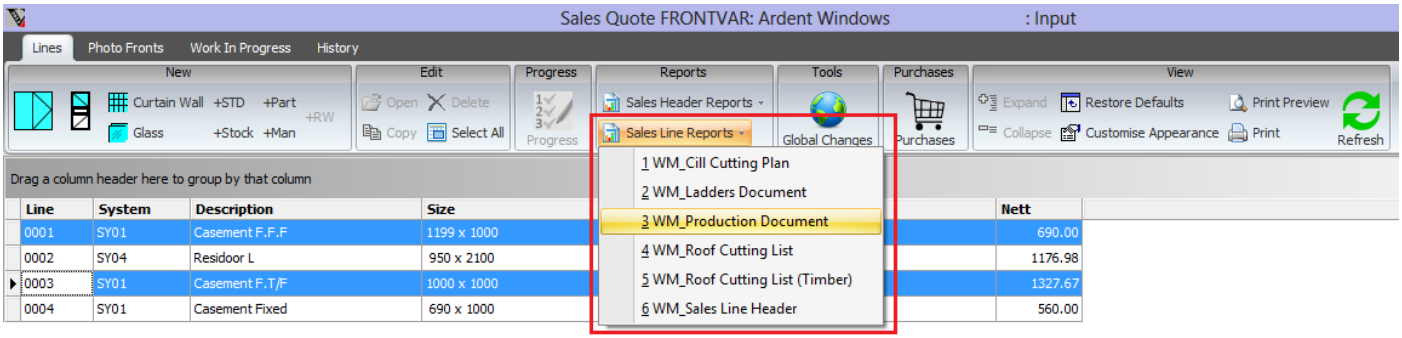
- The 'Synchronise (Sales)' and 'Synchronise (Inventory)' processes are now optimised for better performance and hence faster.
- Users are no longer required to stop order entry while the 'Synchronise (Sales)' process is being executed.

Windowmaker 2012 R3

General Enhancements

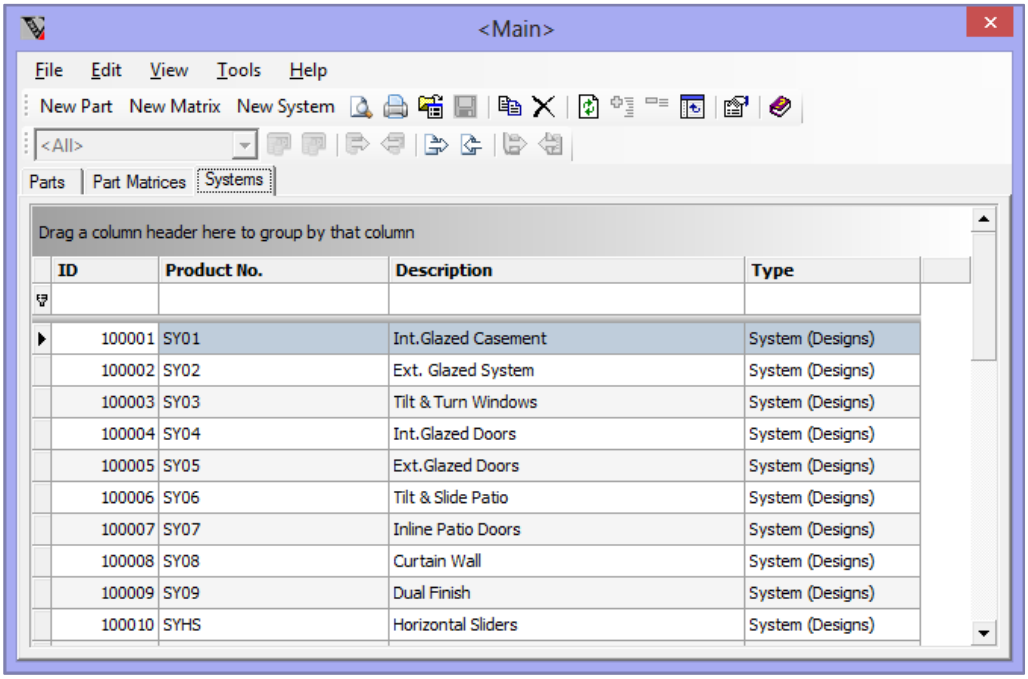
Running a Crystal Report on multiple Sales Lines

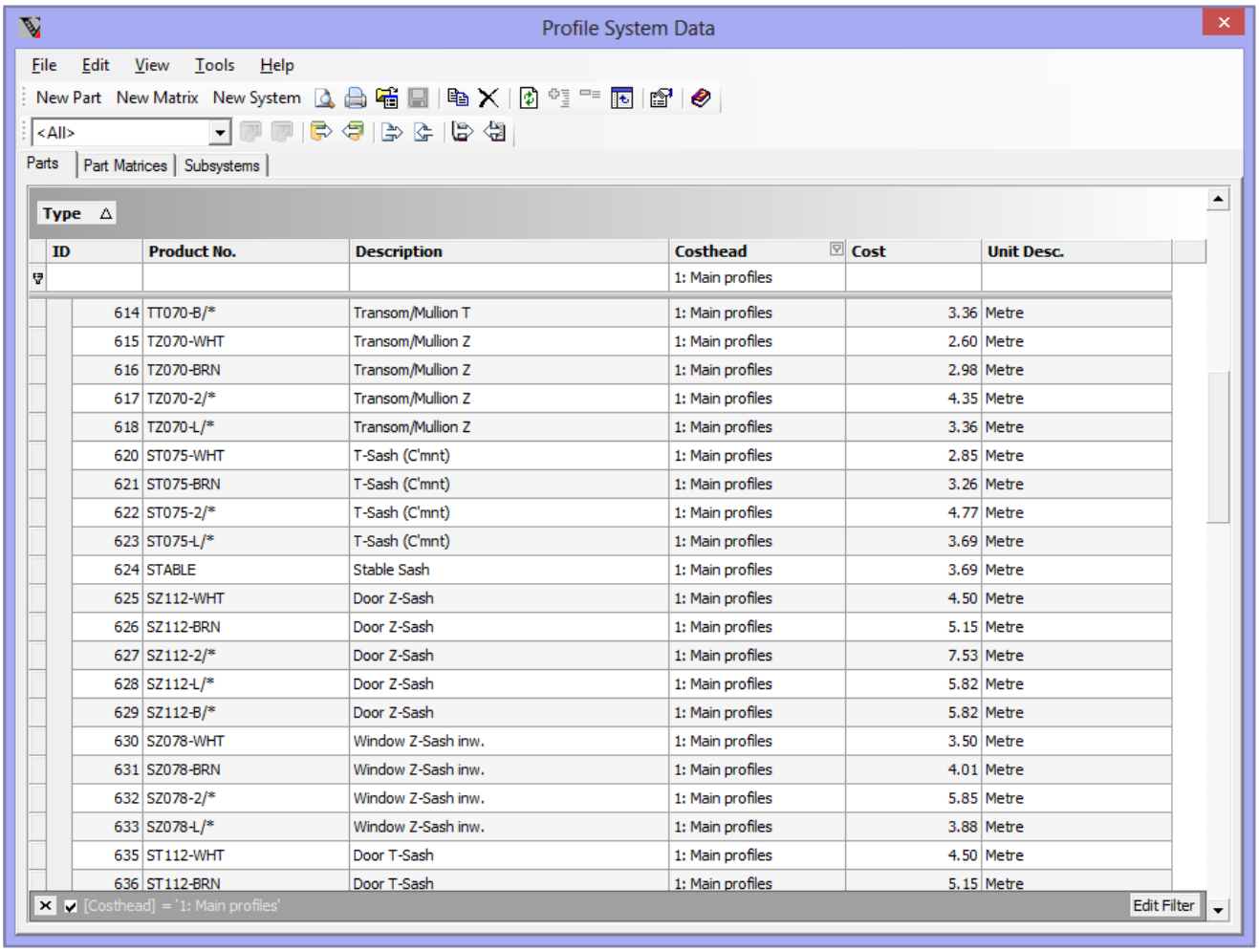
It is now possible to run a Sales Line report on multiple Sales Lines. A separate report will be generated for each selected Sales Line.



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.



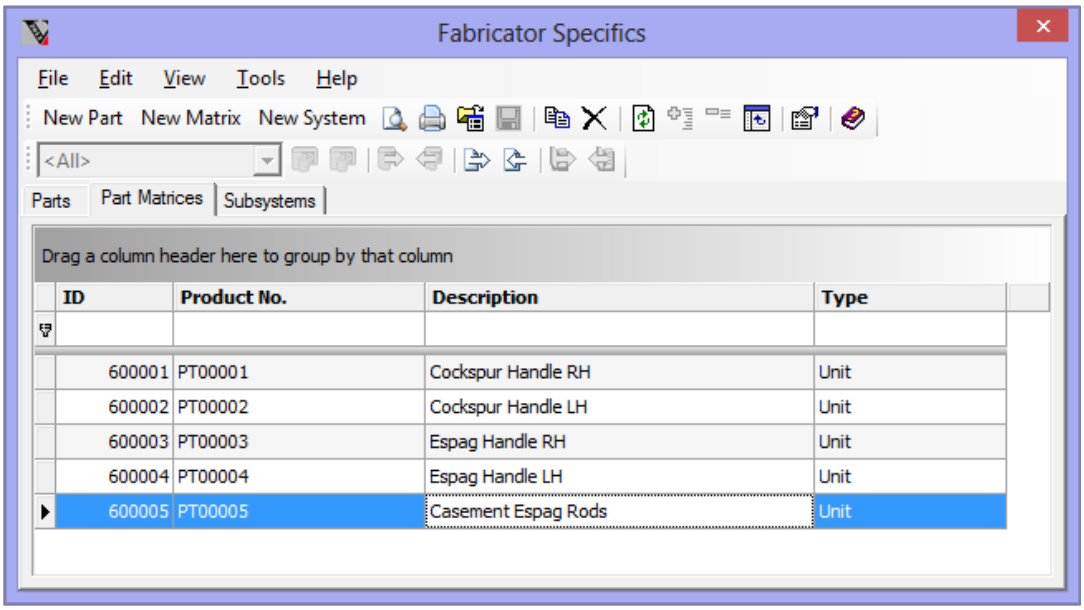


Support to Independent Part Matrices when modules migrated to database

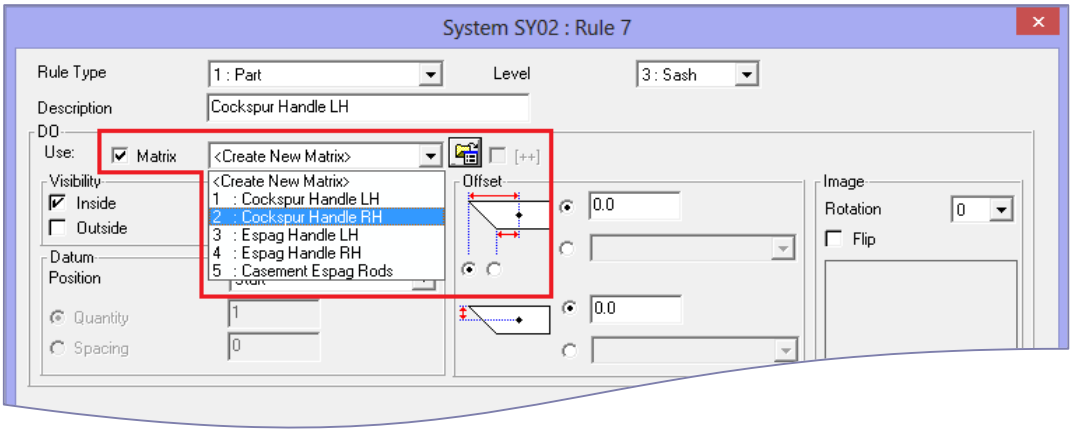
Windowmaker supports two types of Part Matrix:

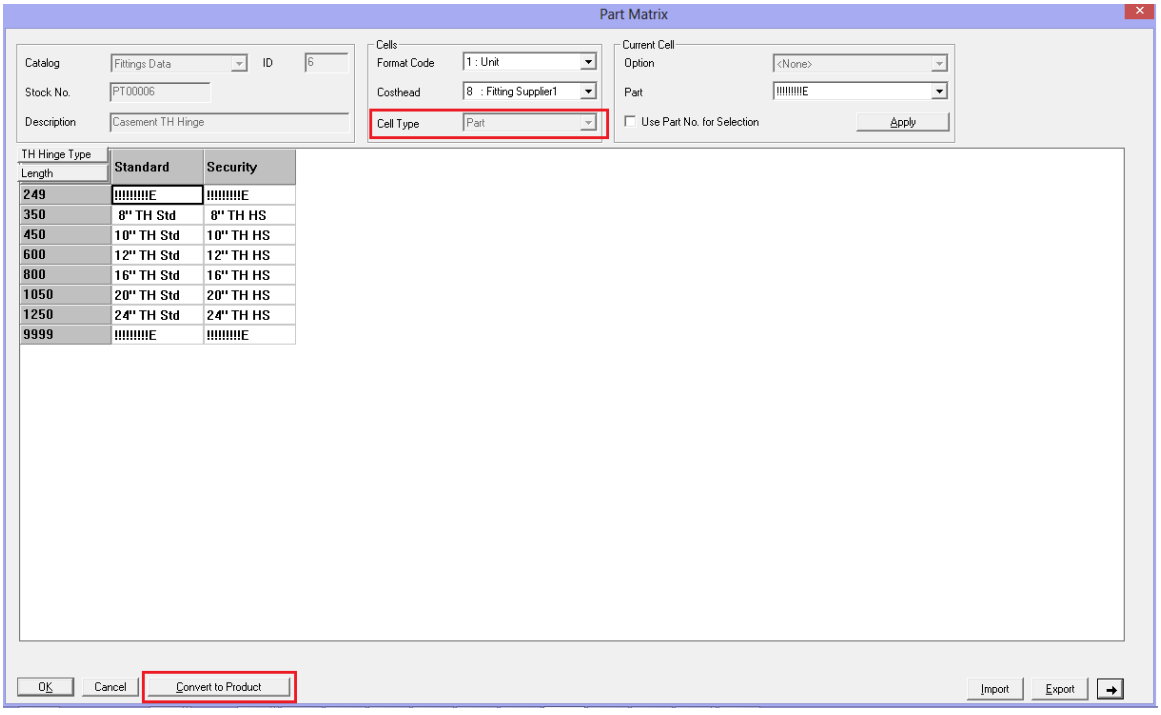
1. **Independent** - This is the traditional type used before modules were migrated to the database. The key advantage is that a single matrix can be used by multiple rules.
2. **On-rule** - This type was introduced when modules were first migrated to the database. The key advantage is that the matrix 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.



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.

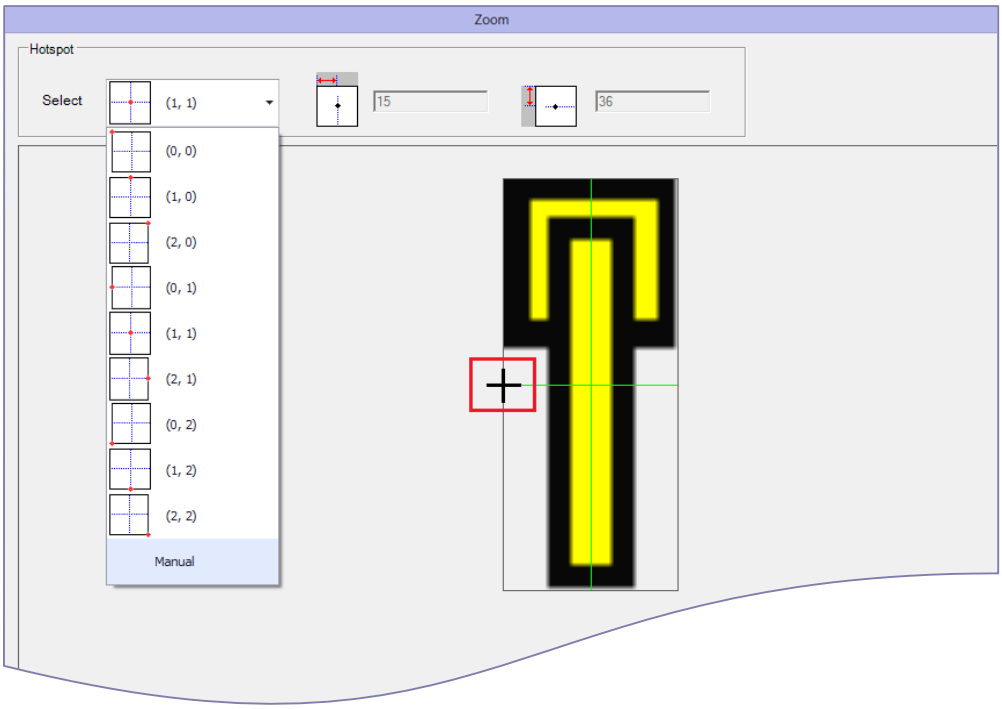




'Hotspot' co-ordinates in Product image

'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.



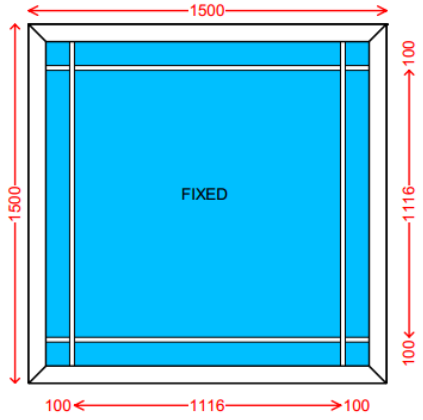
Glazing Specification

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

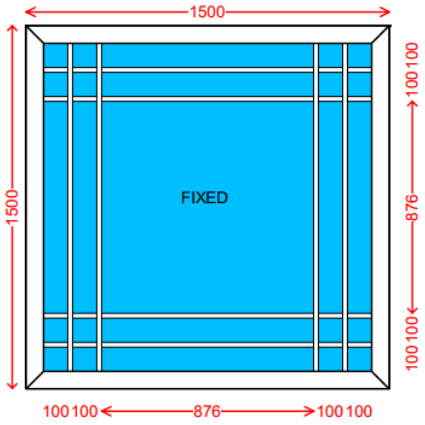
Enhancement to Options

Georgian Grids

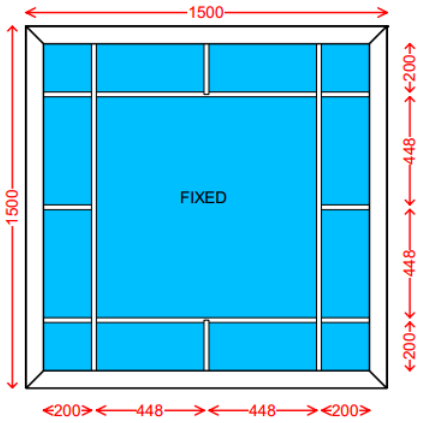
Applying standard grid patterns with minimal effort
It is now possible to setup some of the most popular grid layouts (see examples below).Applying these to windows/doors at order entry is now just a few clicks.



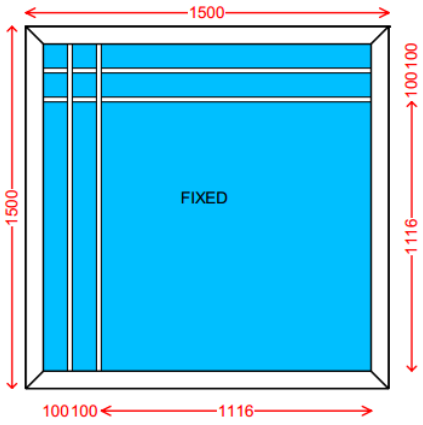
Single Heritage/Prairie



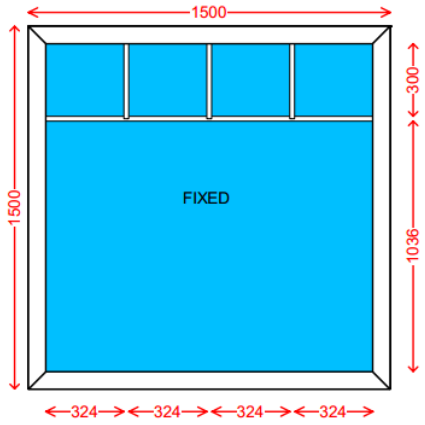
Double Heritage/Prairie



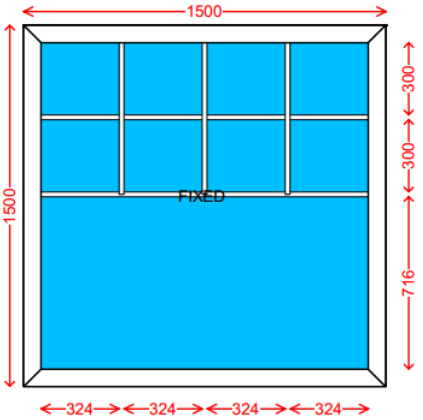
Contour



Co-ordinate



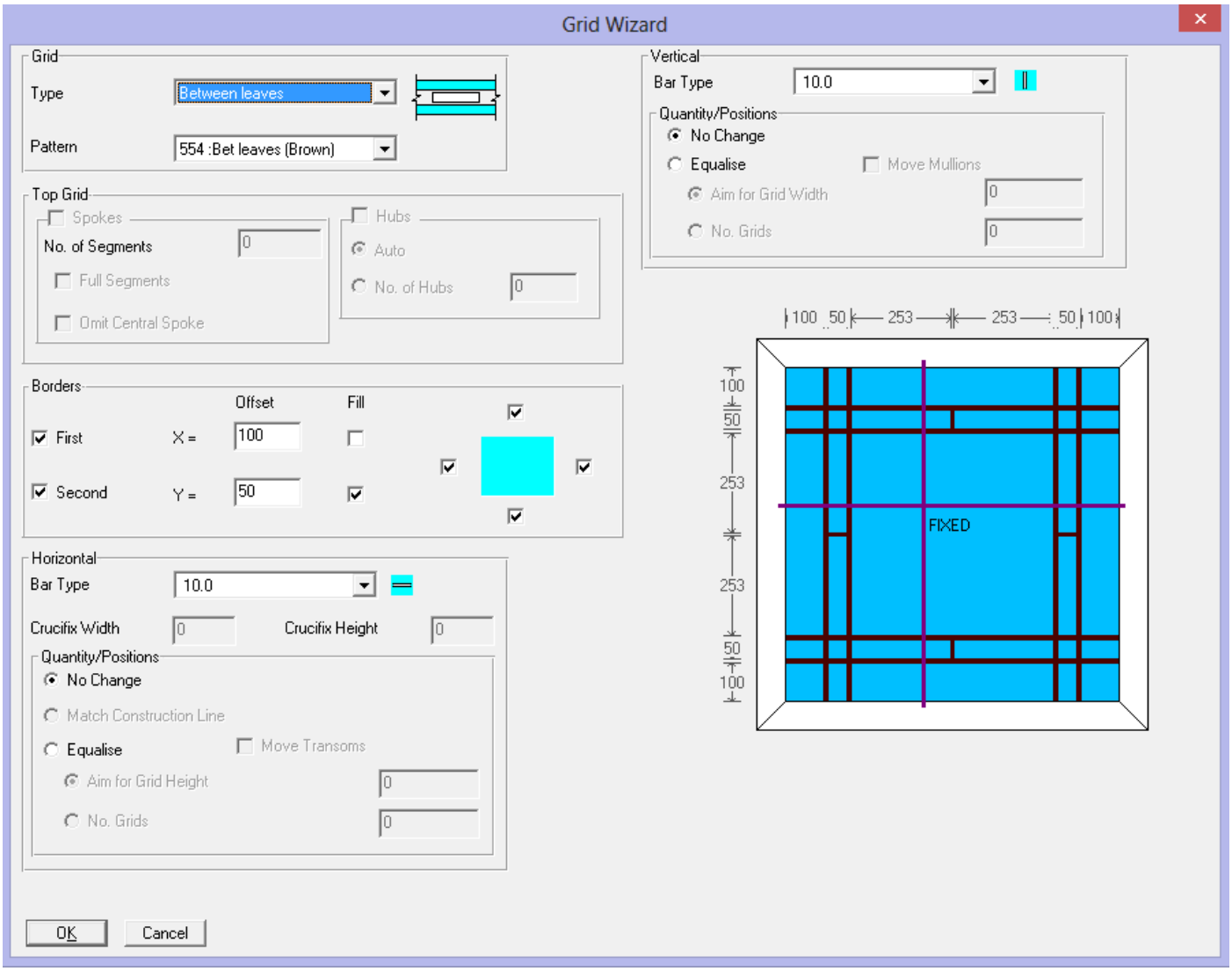
Edwardian/Hanging



Double Hanging

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.



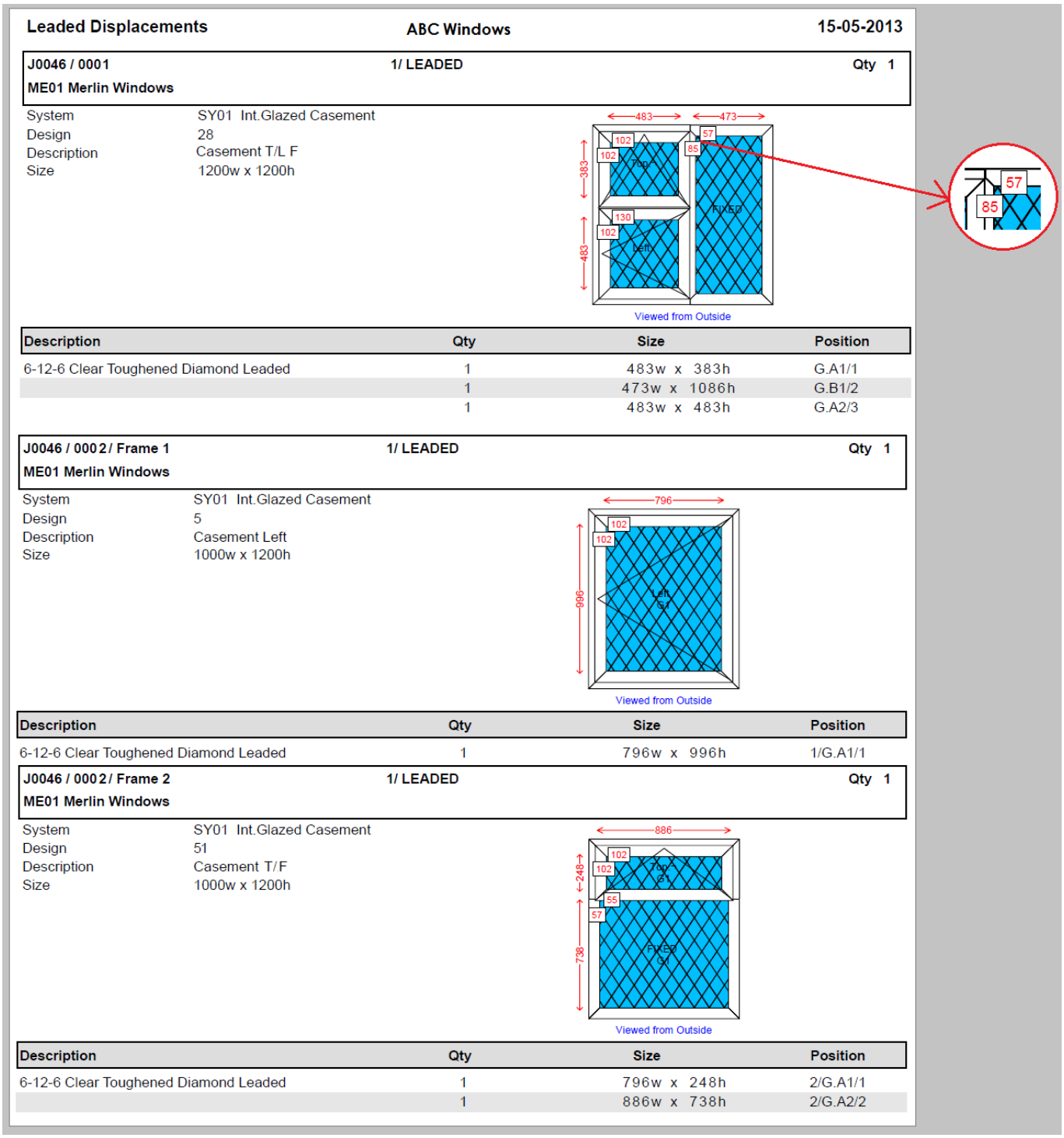
Sunburst

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'.

Leaded

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 Displacements **ABC Windows** **15-05-2013**

J0046 / 0001 **1/ LEADED** **Qty 1**
ME01 Merlin Windows

System SY01 Int.Glazed Casement
Design 28
Description Casement T/L F
Size 1200w x 1200h

Viewed from Outside

Description	Qty	Size	Position
6-12-6 Clear Toughened Diamond Leaded	1	483w x 383h	G.A1/1
	1	473w x 1086h	G.B1/2
	1	483w x 483h	G.A2/3

J0046 / 0002 / Frame 1 **1/ LEADED** **Qty 1**
ME01 Merlin Windows

System SY01 Int.Glazed Casement
Design 5
Description Casement Left
Size 1000w x 1200h

Viewed from Outside

Description	Qty	Size	Position
6-12-6 Clear Toughened Diamond Leaded	1	796w x 996h	1/G.A1/1

J0046 / 0002 / Frame 2 **1/ LEADED** **Qty 1**
ME01 Merlin Windows

System SY01 Int.Glazed Casement
Design 51
Description Casement T/F
Size 1000w x 1200h

Viewed from Outside

Description	Qty	Size	Position
6-12-6 Clear Toughened Diamond Leaded	1	796w x 248h	2/G.A1/1
	1	886w x 738h	2/G.A2/2

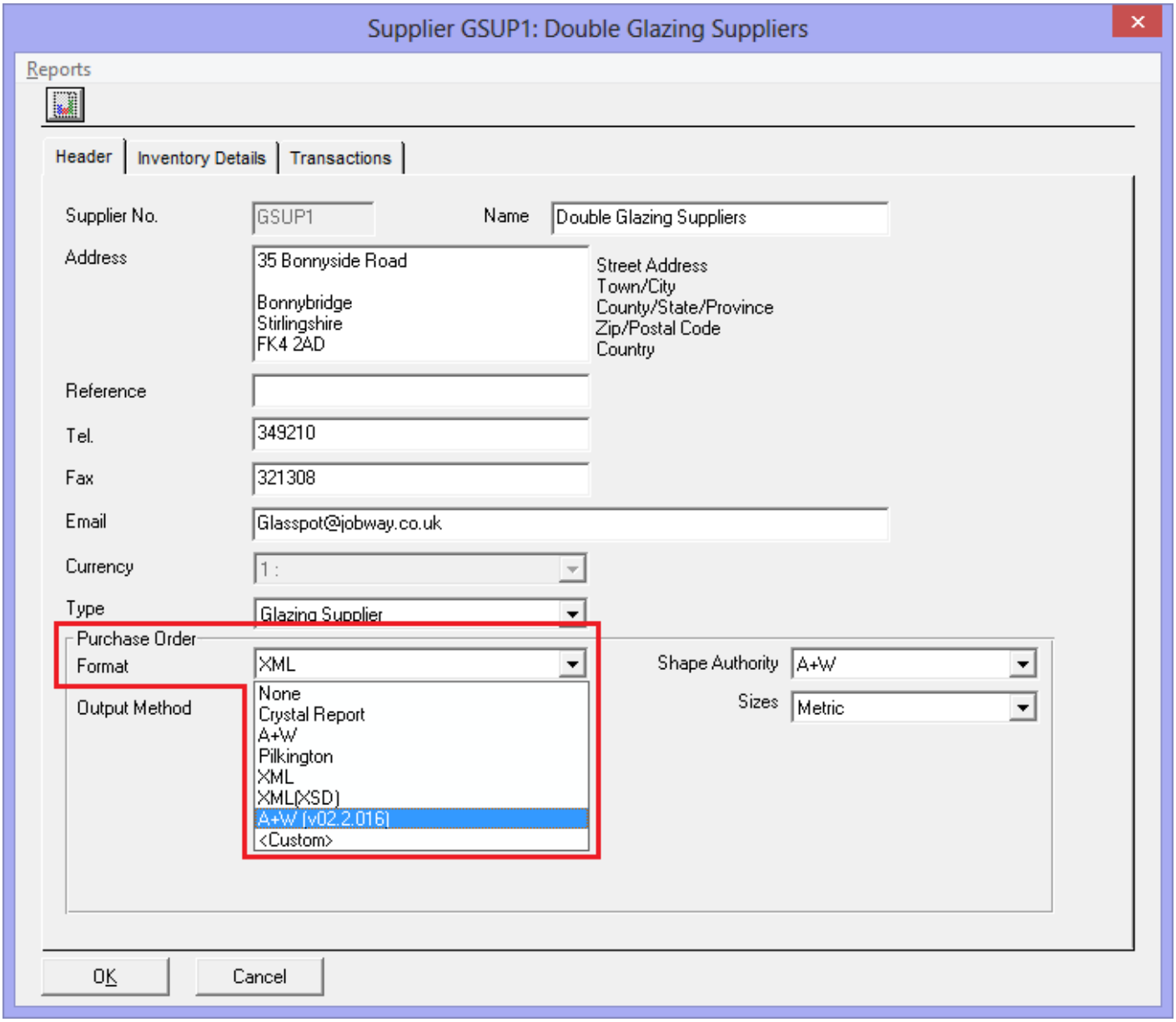
Refer **'How to use Diamond Leaded Patterns'** and **'Leaded Displacements Report'** help topics for details.

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

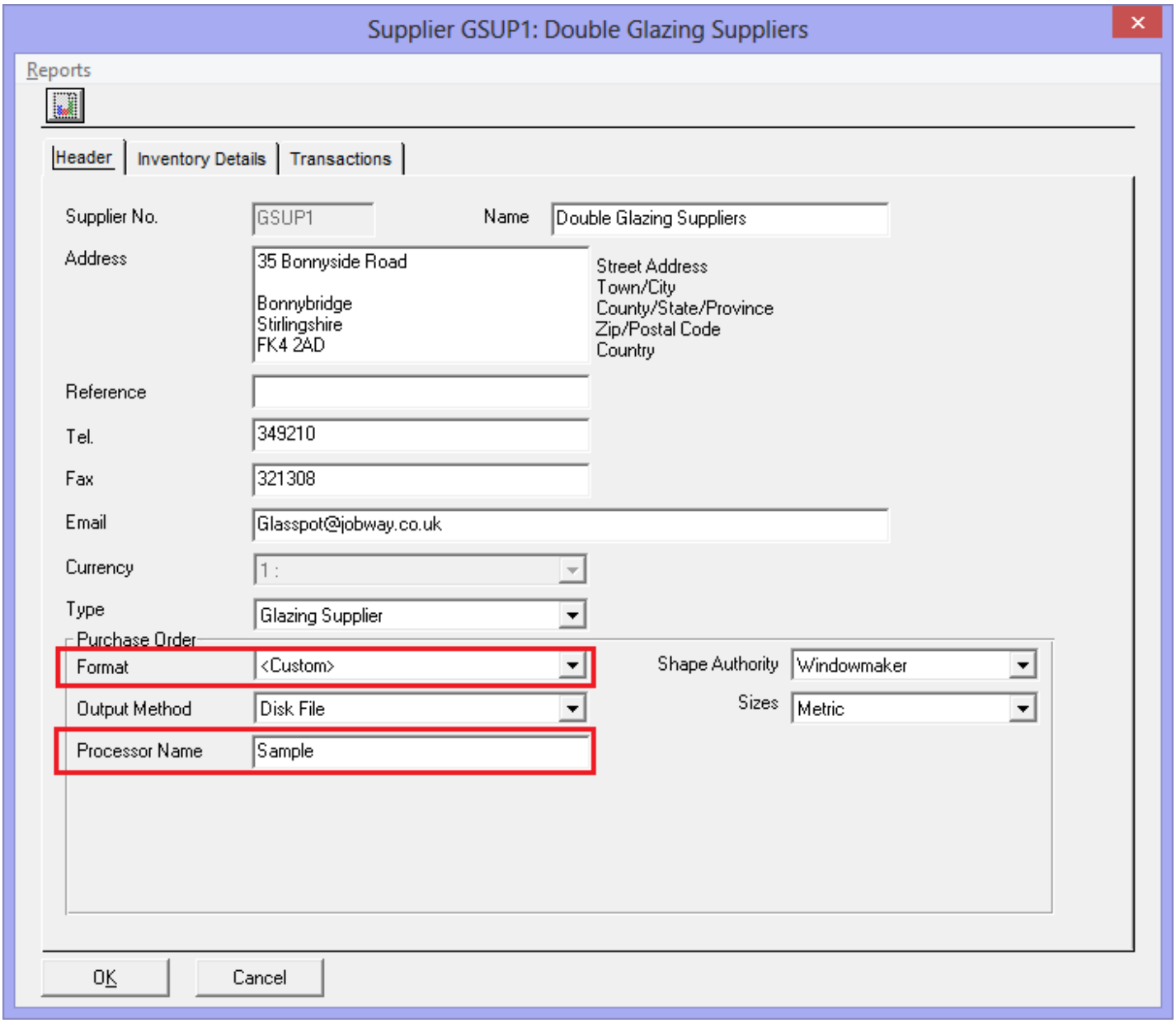
directly into the A+W order system. Alternatively, the purchase orders can be automatically uploaded to a FTP site of your supplier.



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.



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 AKS1900 4-Head welder.

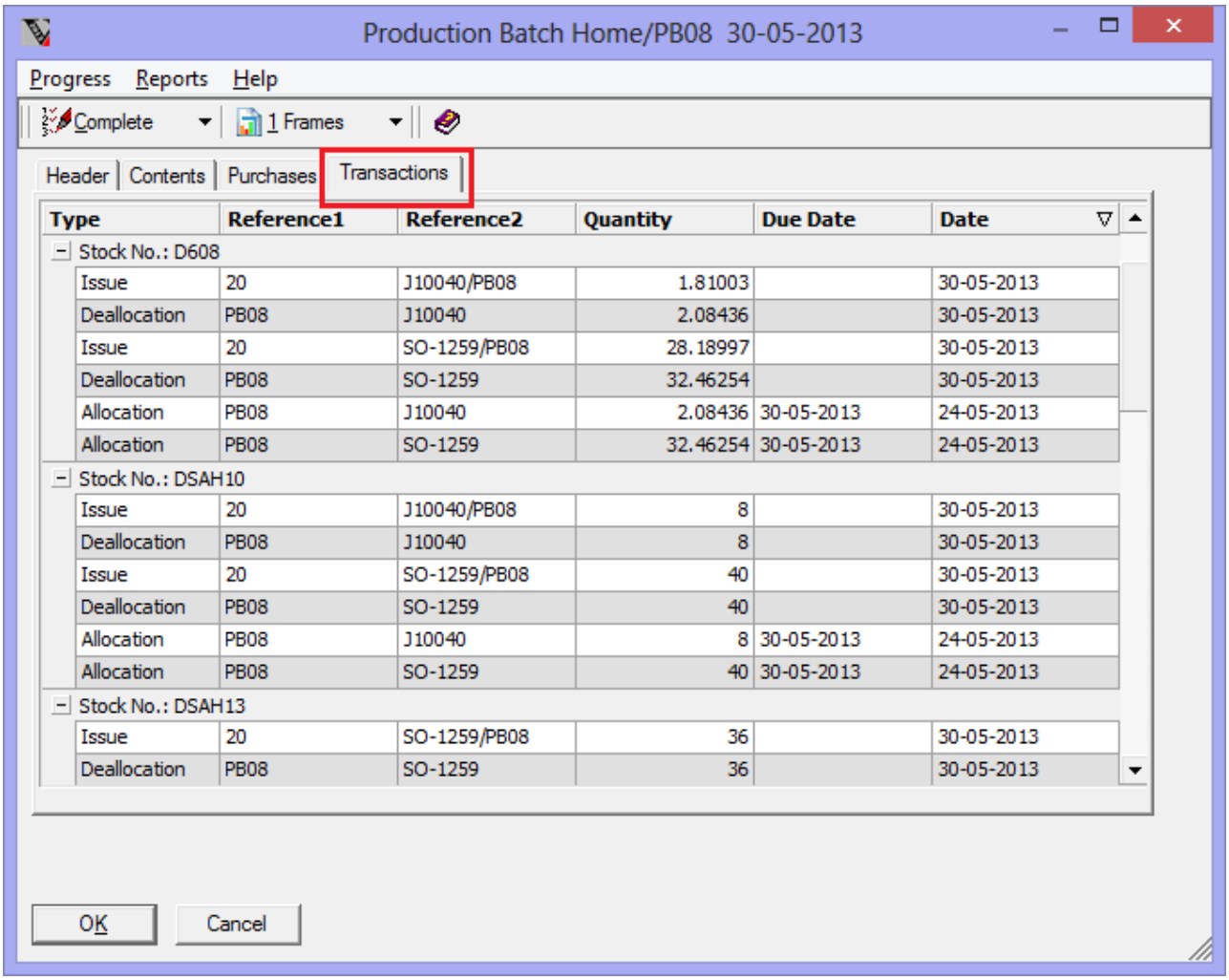
Link to Stock

Link to Stock is now also available for running

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

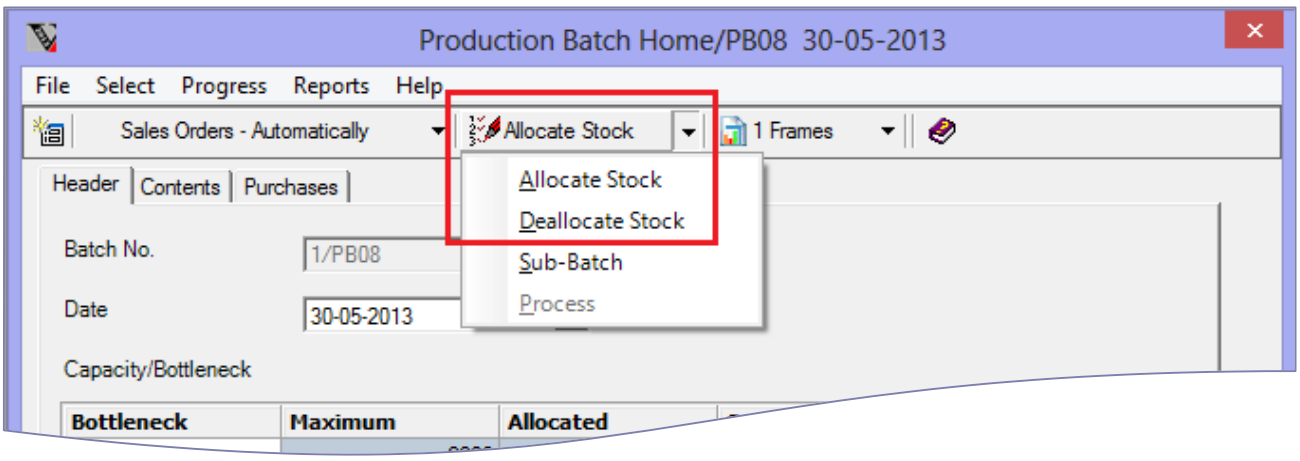
Stock Control

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.



Type	Reference1	Reference2	Quantity	Due Date	Date
Stock No.: D608					
Issue	20	J10040/PB08	1.81003		30-05-2013
Deallocation	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.: DSAH10					
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
Allocation	PB08	SO-1259	40	30-05-2013	24-05-2013
Stock No.: DSAH13					
Issue	20	SO-1259/PB08	36		30-05-2013
Deallocation	PB08	SO-1259	36		30-05-2013

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



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:

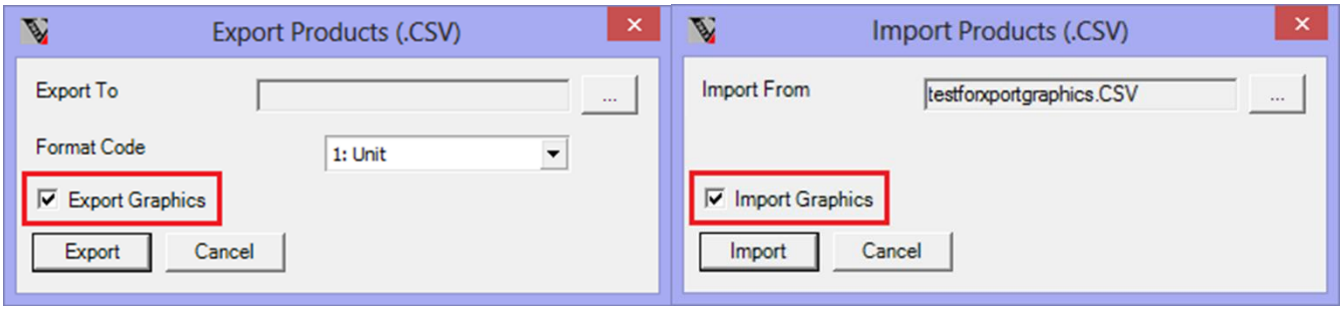
- you have just started using the Windowmaker Link to LogiKal facility and you want to import all live projects into Windowmaker
- for some reason you had to use LogiKal in a standalone mode and later on you want to transfer the projects created in the meantime into Windowmaker

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



Windowmaker 2012 R2.1

General Enhancements

Windows Server 2012 for Windowmaker

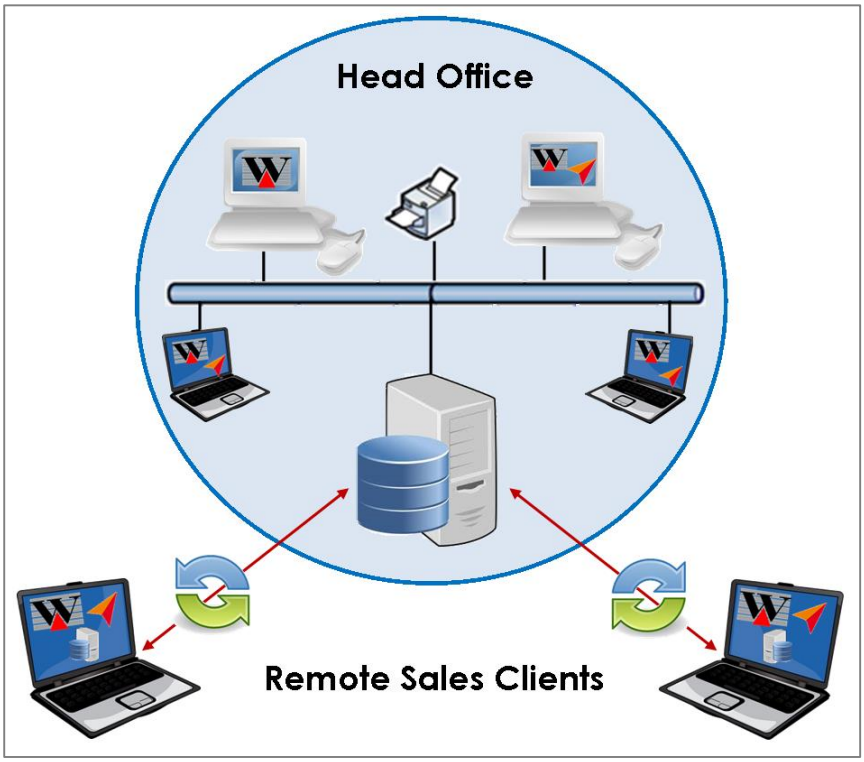
Windowmaker now supports running on Windows Server 2012 operating system.

Department Navigation Tree

You can now expand and collapse the Navigation Tree list using right (→) and left (←) 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

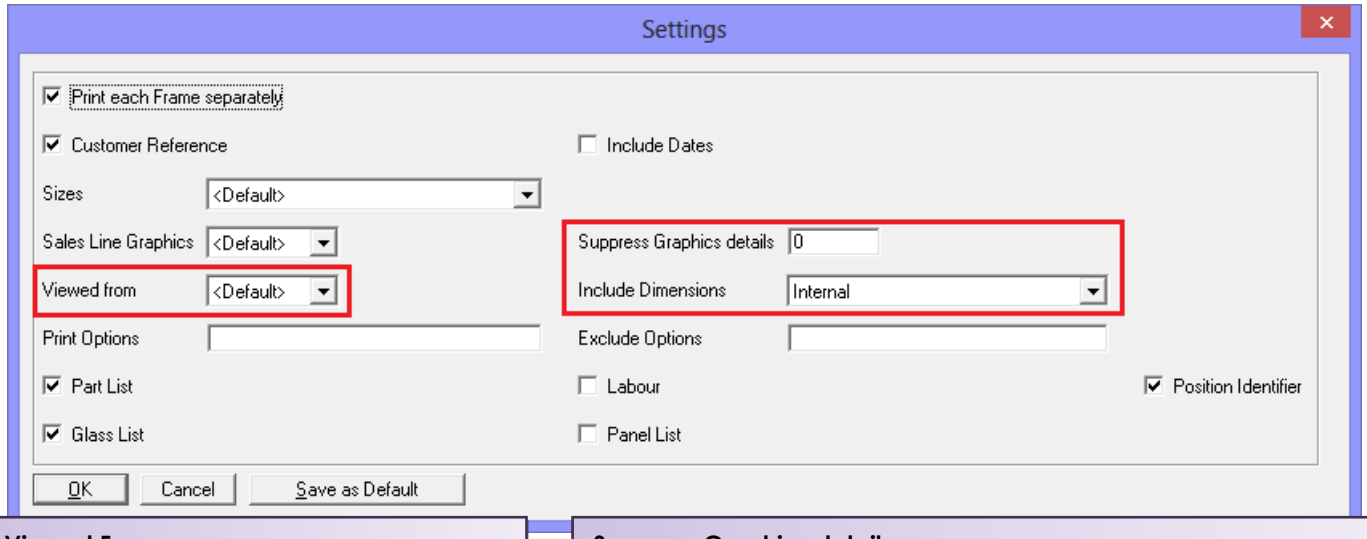
You can now
- Select a folder and specify a name for the XML file to which catalog(s) can be exported.
- Select a folder and XML file from which catalog(s) can be imported.

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.



Viewed From:
- <Default>
- Inside
- Outside

Include Dimensions:
- Internal
- Internal + Georgian Sightline
- Overall + Internal + Georgian

Suppress Graphics details:

Value	Effect on Sales Line Graphics
0	Nothing
1	Suppress Glass, Panels and Profile colour
2	Suppress Unit part images (e.g. Handles)
4	Suppress Panel images
8	Suppress Glass Colour
16	Suppress Profile Colour
32	Output dimensions with one decimal place
64	Output dimensions with two decimal places
96	Output dimensions with three decimal places
128	Round up dimensions to the specified decimal places

Specify sum of values to make the corresponding settings effective (e.g. '33' i.e. 1+32 to bring both the corresponding effects on the Sales Line 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

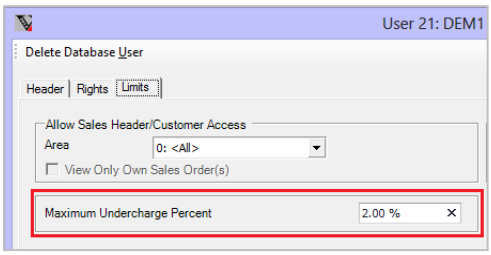
Windowmaker now supports running on Windows 8 operating system.

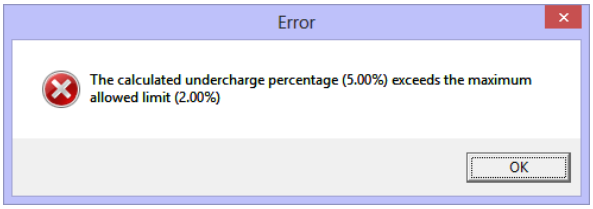
'Maximum Undercharge Percent' setting for Users

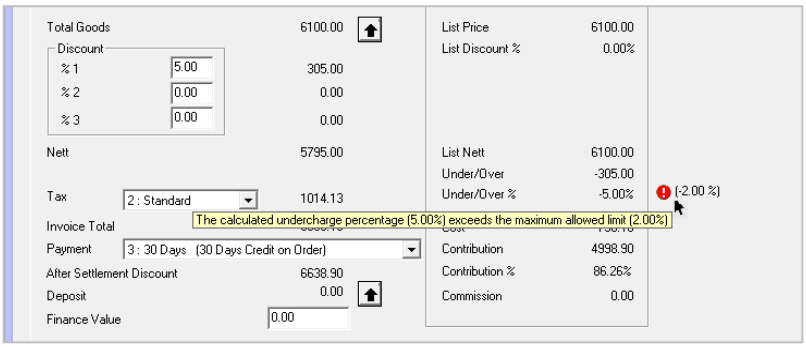
The program can now

- 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.

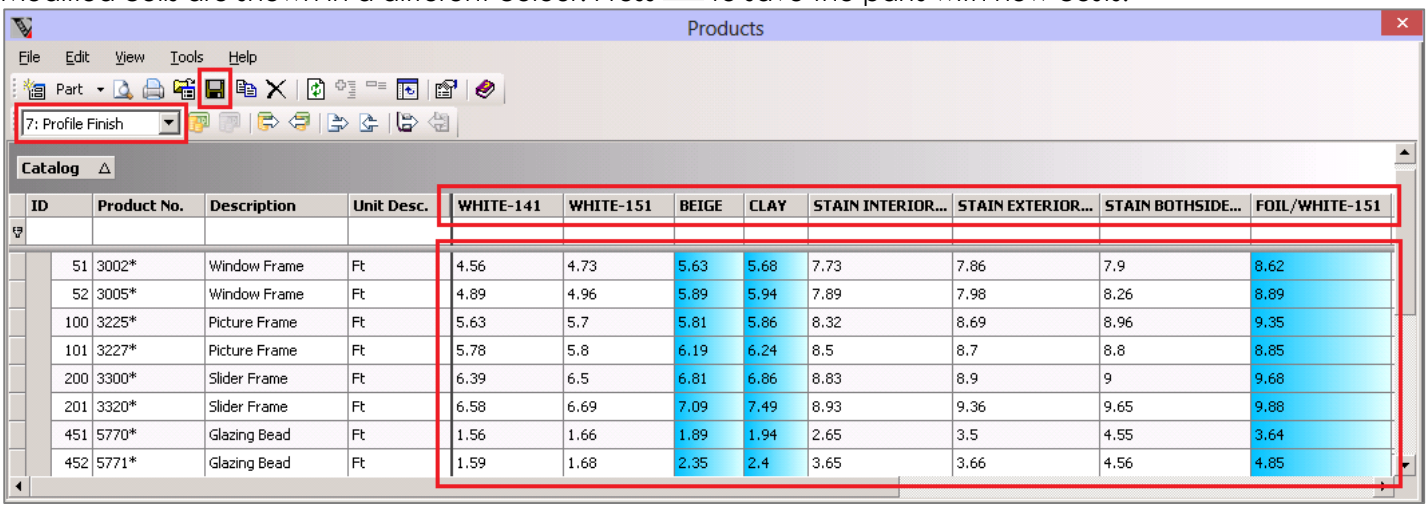






Easier maintenance of costs for parts costed via 1D cost matrix

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.

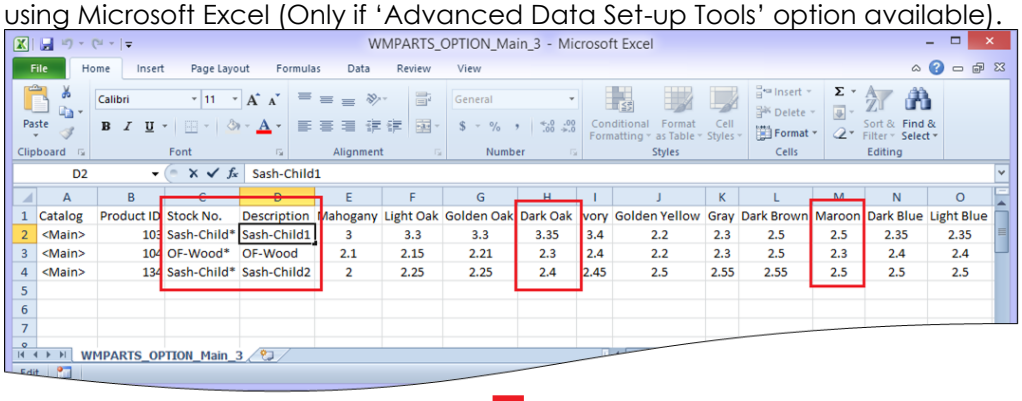


ID	Product No.	Description	Unit Desc.	WHITE-141	WHITE-151	BEIGE	CLAY	STAIN INTERIOR...	STAIN EXTERIOR...	STAIN BOTHSIDE...	FOIL/WHITE-151
51	3002*	Window Frame	Ft	4.56	4.73	5.63	5.68	7.73	7.86	7.9	8.62
52	3005*	Window Frame	Ft	4.89	4.96	5.89	5.94	7.89	7.98	8.26	8.89
100	3225*	Picture Frame	Ft	5.63	5.7	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
452	5771*	Glazing Bead	Ft	1.59	1.68	2.35	2.4	3.65	3.66	4.56	4.85

Products Setup form enhancements

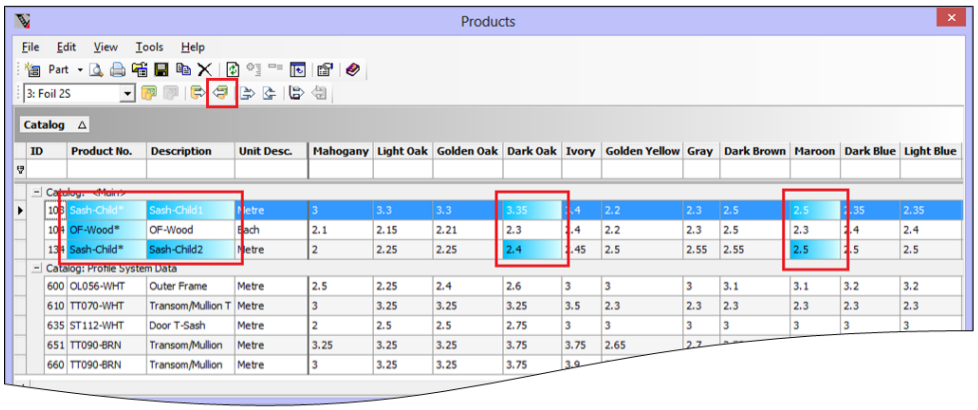
Using the Product Setup form you can now:

- 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).

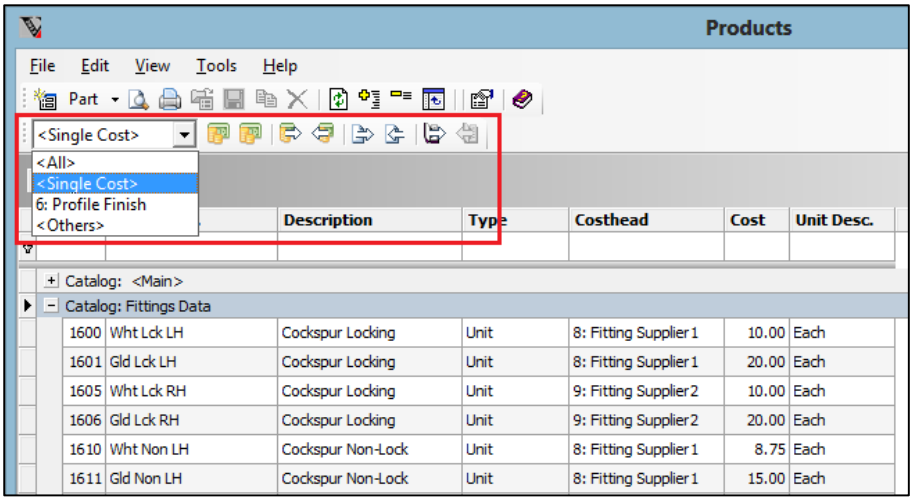


Modify Product information in Excel

Import Updates



Modified Product information indicated in blue cells



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

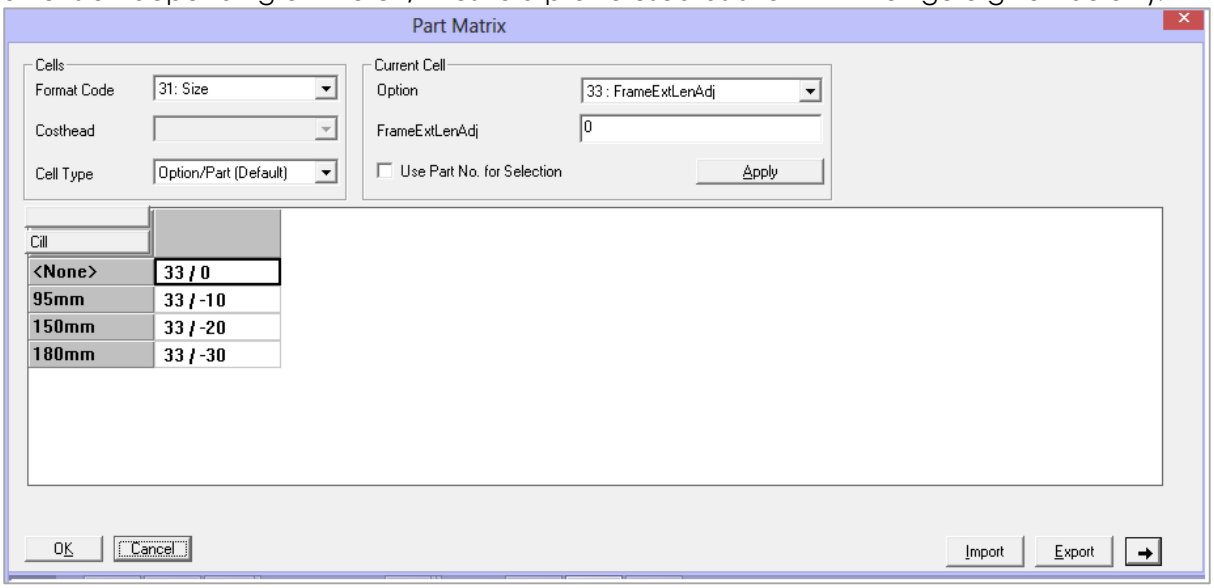
Set-up - Support for negative values for size type Options in matrices

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.

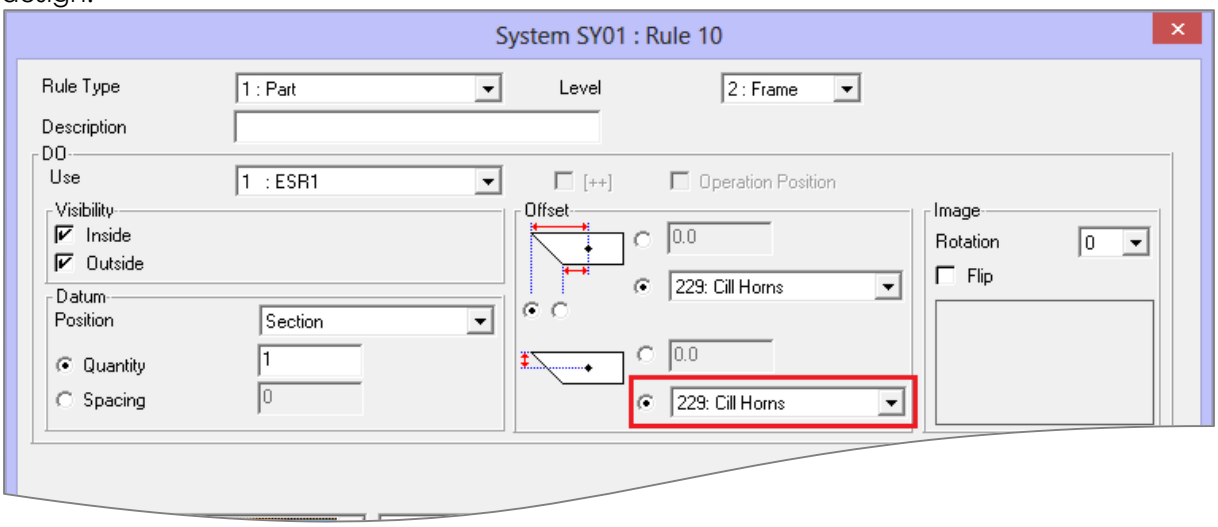
E.g. A negative adjustment can be required to shorten length of the profile calculated (say of frame extension depending on the cill/threshold profile used as shown in the figure given below):



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.

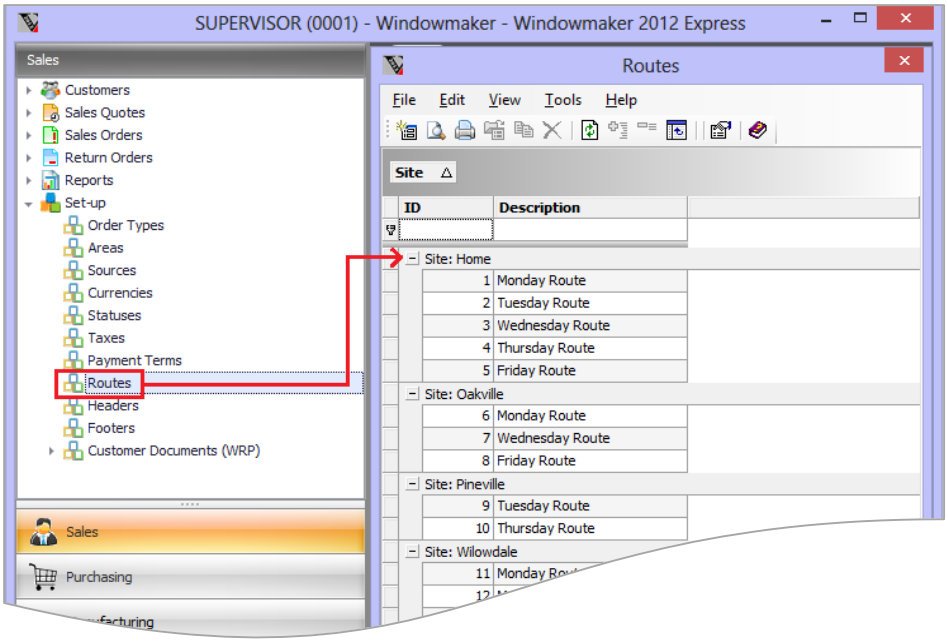


Sales Header Codes

The Sales Header Codes are modified to reflect the following:

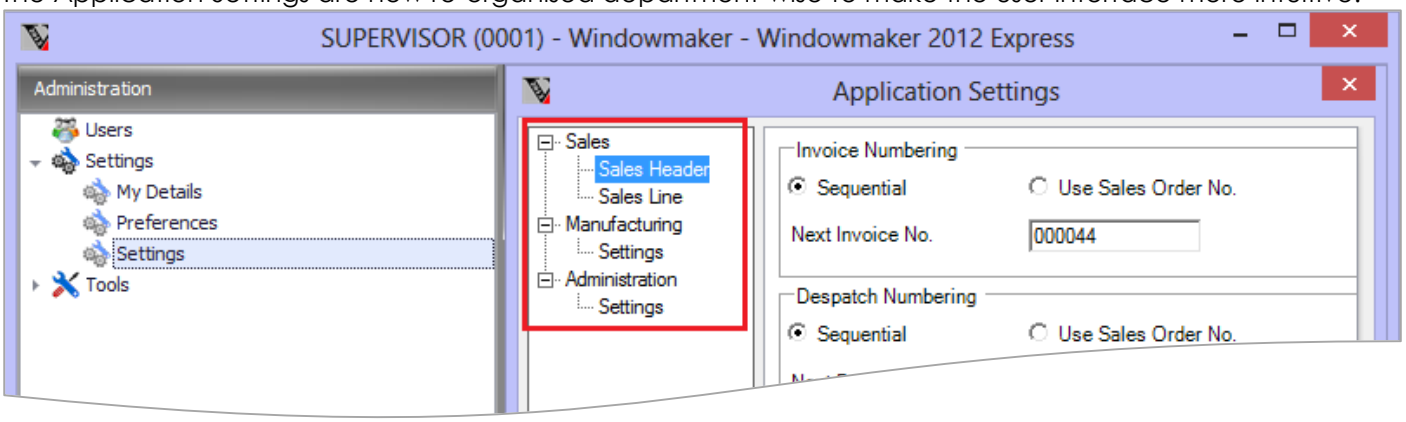
Sales Header Code	Migrated to DB in this Release	Database Table	Maximum Record Limit		Remarks
			Old	New	
Source	✓	WMSource	20	99	Description character limit increased to 20.
Status	✓	WMStatus	99	99	Description character limit increased to 20.
Tax	✓	WMTax	20	99	
Order Type	-	WMOrderType	999	999	-
Area	-	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.



Application Settings

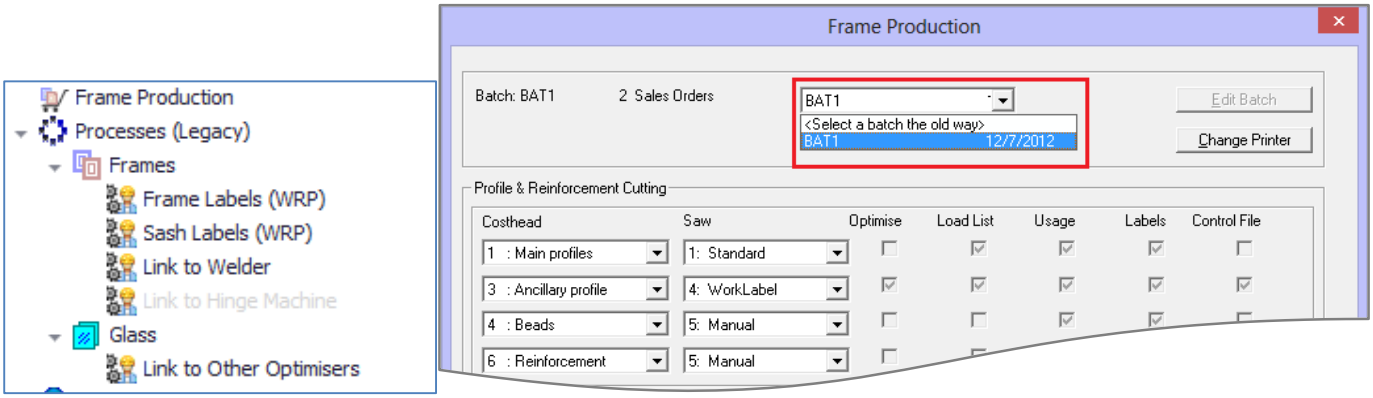
The Application Settings are now re-organised department-wise to make the user interface more intuitive.



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 Help@windowmaker.com.

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.

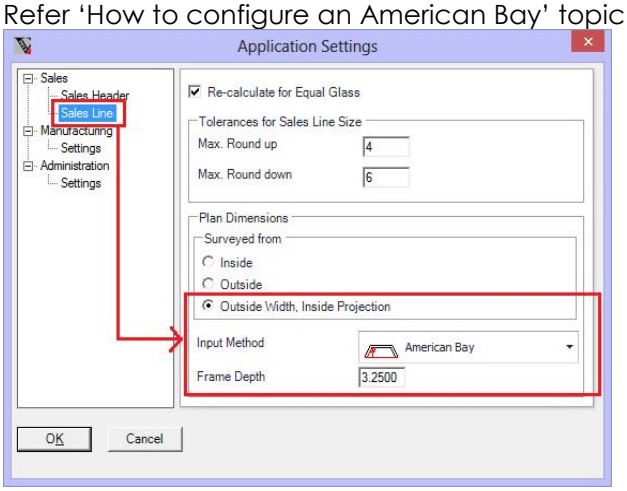


Figure 1

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

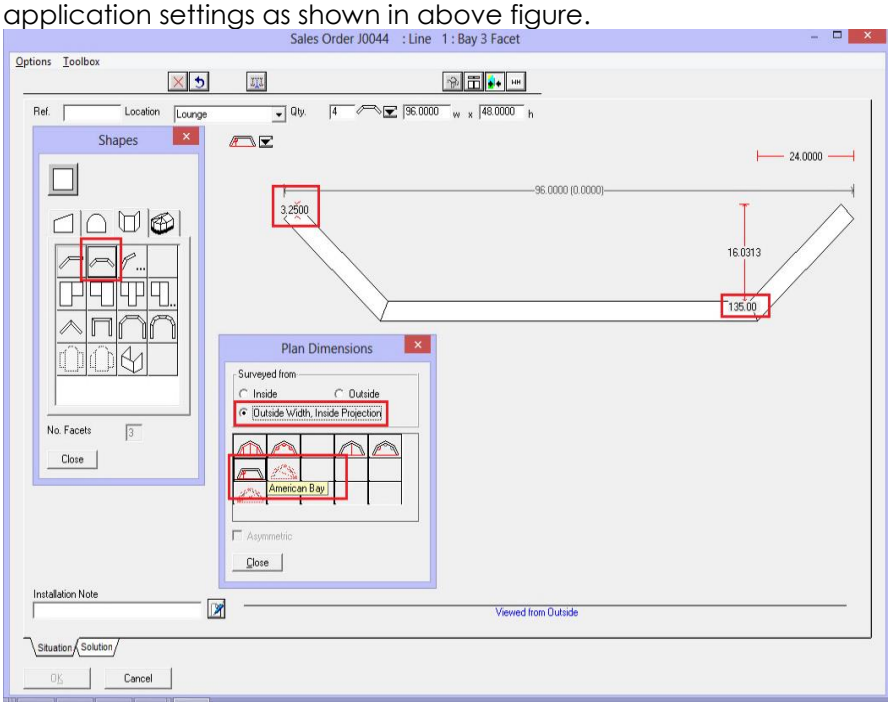


Figure 2

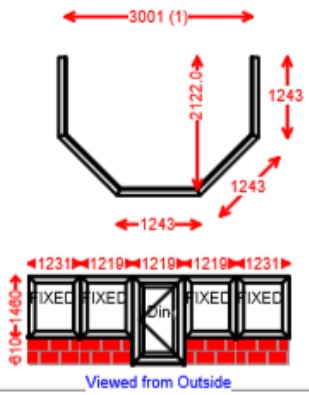
Bays, Bows/Customer Documents

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

- Quotation
- Order Acknowledgment
- Survey Sheet

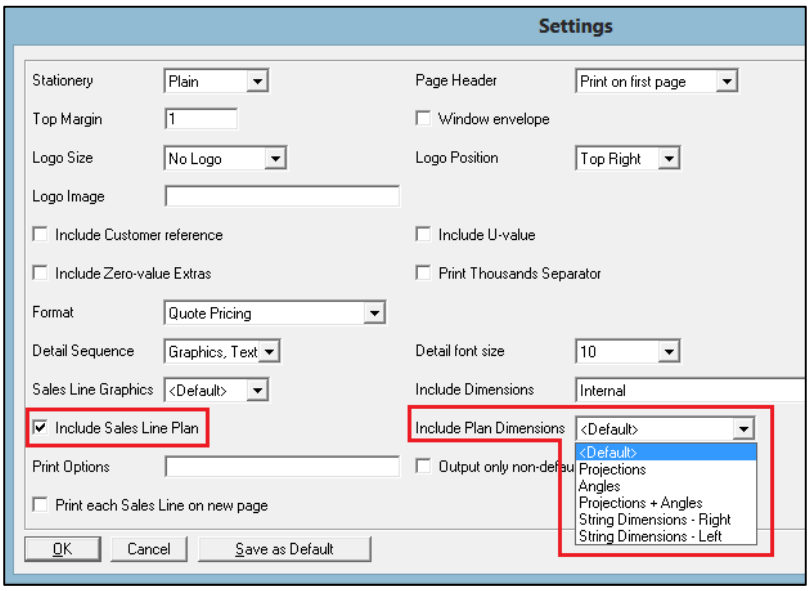
Quote No.	Date	Customer Ref.	Responsible
Q0023	20/12/2012		Chris

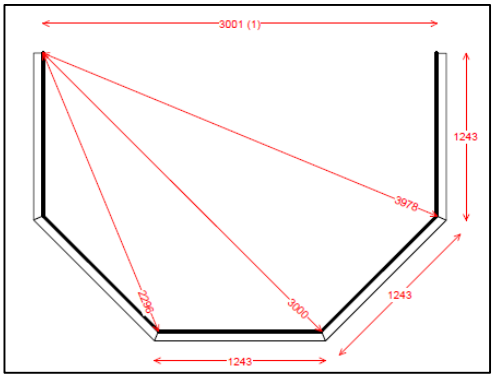
Sales Line	Details	Qty	Options	
0001	Bay 5 Facet 3000w x 2100h	1	PVC Colour Outer Frame Door Z-Sash Handle Colour Door Lock Type Door Handle **Cill** 4-20-4 Clear	White 72mm 112mm White Standard Levr/Lever **95mm**



Total		£	**383.58**
Standard	20.00 %	£	76.72
Grand Total		£	**460.30**

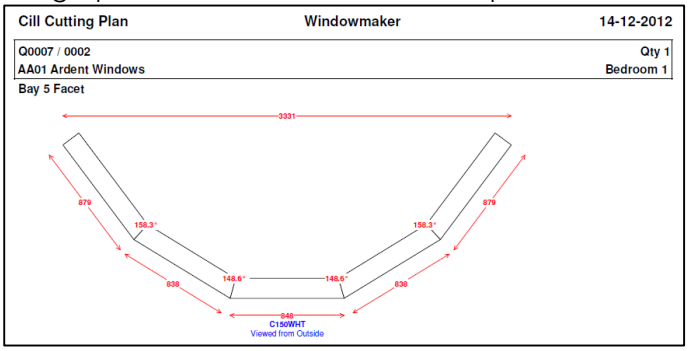
By default, the standard customer documents will include the plan graphics. Unselect the 'Include Sales Line Plan' setting to suppress it, if required.

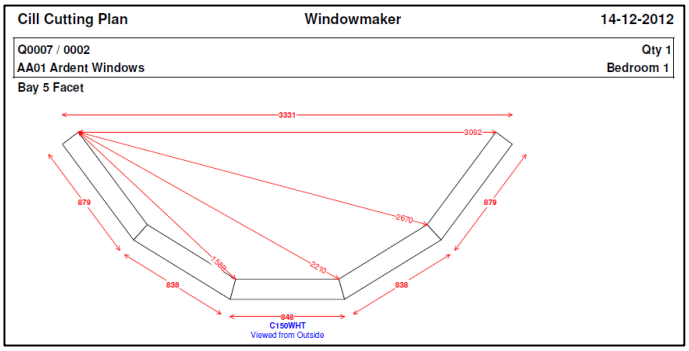


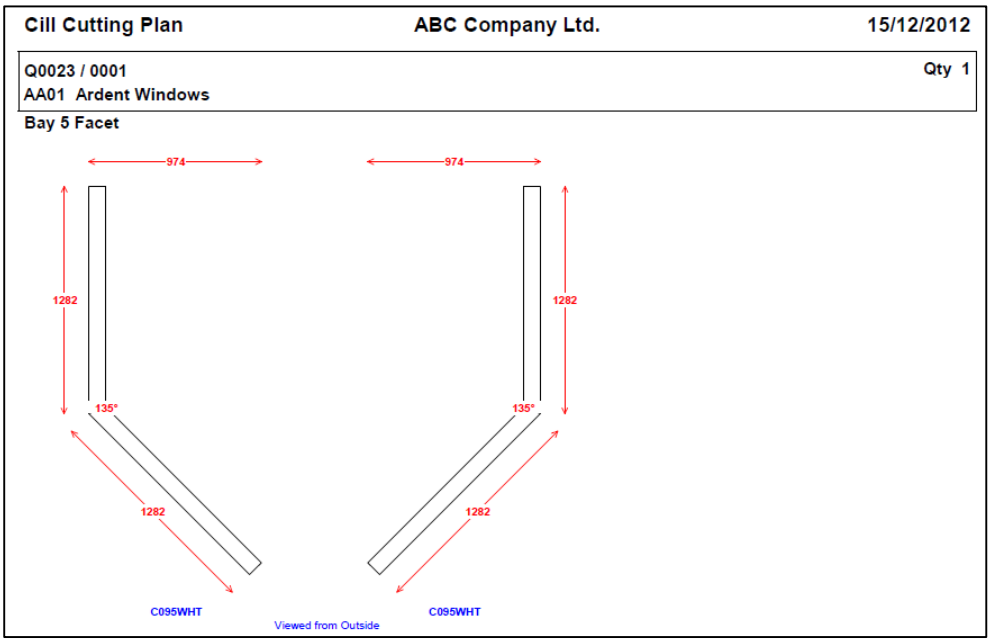


Bay and Cill Plan Graphics

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.







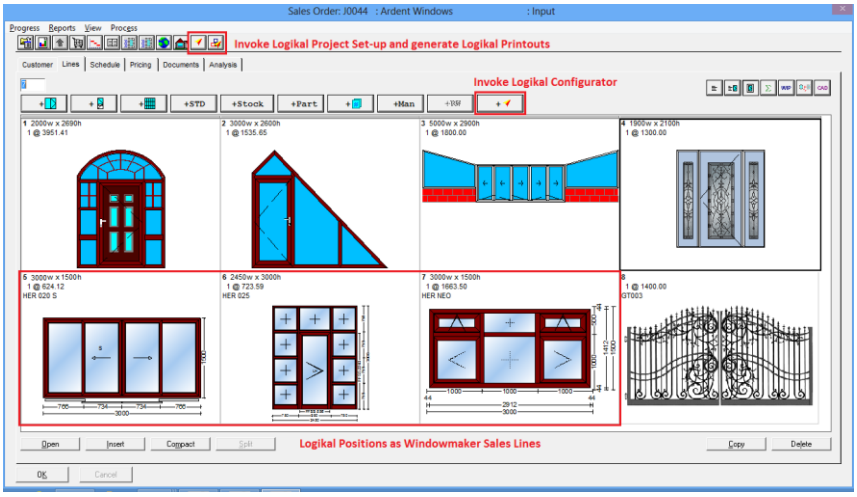
Windowmaker boost for Logikal users

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.

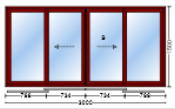
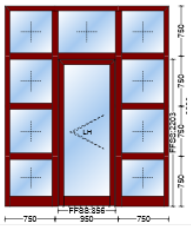
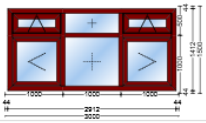
- Scheduling
- Stock Control
- Tracking work in progress
- Integrating with Microsoft Dynamics NAV and AX; or other ERP systems
- Better reporting
- Synchronising Sales Quotes/Orders including Logikal Lines with Sales Clients



A Sales Order with combined Windowmaker and Logikal Lines

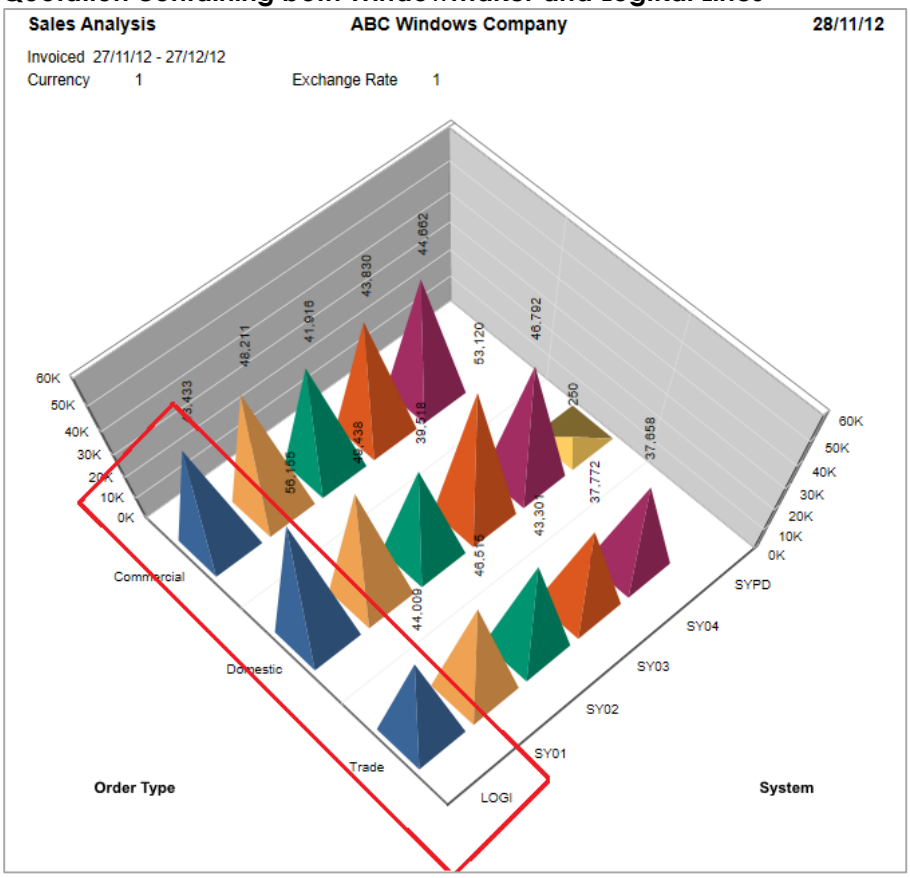
B/FWD £ 8452.06

Quote No.	Date	Customer Ref.	Responsible
WMLK	19/12/2012		Chris

Sales Line	Details	Qty	Rate	Amount
0005	 WM_LK Sliding Window Heroal 020 S;020 S 3000w x 1500h	1	637.63	637.63
0006	 WM_LK Door Element Heroal 025;025 2450w x 3000h	1	759.54	759.54
0007	 Window Element neo 72 Variant 1,4 Glazing Bead List: 3000w x 1500h	1	1663.50	1663.50
0008	Gate GT003 This gate can be Installed with 10 fixing brackets.	1	1750.00	1750.00

Total		£	**13262.73**
Standard	20.00 %	£	2652.55
Grand Total		£	**15915.28**

Quotation containing both 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 Help@windowmaker.com.

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.

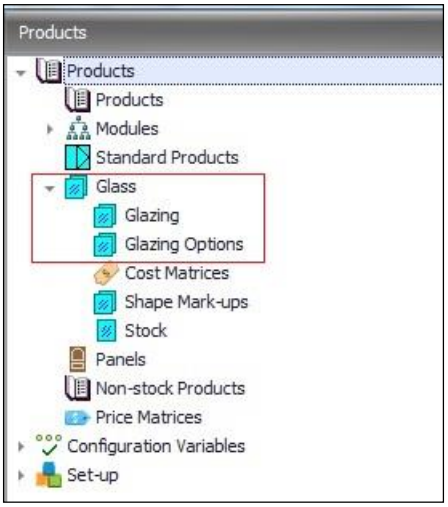
Parts

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

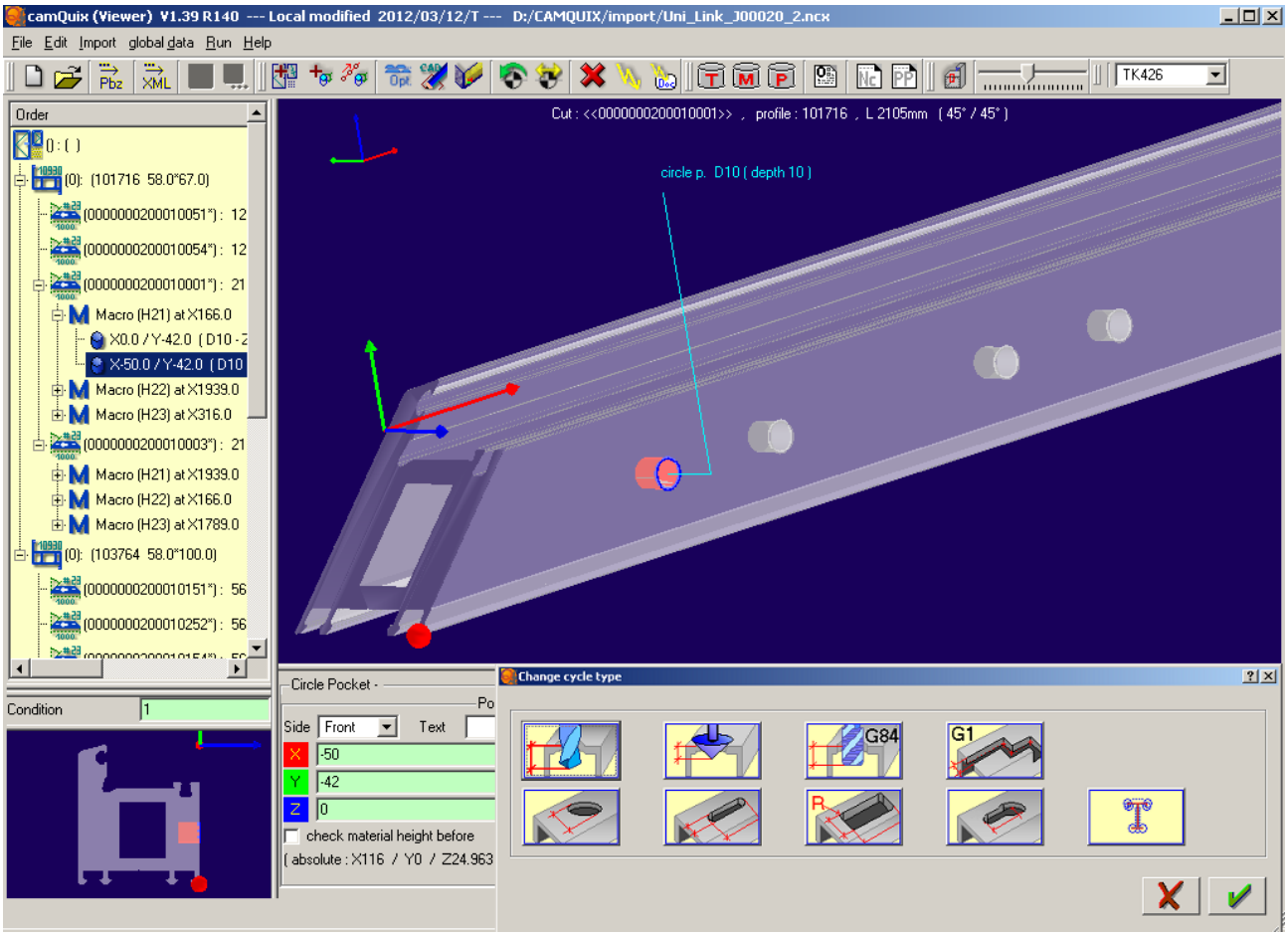
If modules have been migrated to the database, the set-up of glazing is separated into two different menu entries 'Glazing' and 'Glazing Options'. 'Glazing' shows records for Sealed Units, Single Glazing and Unglazed. 'Glazing Options' shows records for Grids, Leaded Patterns and Processes. **Each** 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 Line**for 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 Windowmaker 2012 Release Notes and Windowmaker 2012 Upgrade Guide for instructions on how to upgrade your existing product to Windowmaker 2012.
2. ReferWindowmaker 2012 Installation Guideforinstructions on downloading and installing Windowmaker 2012.

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

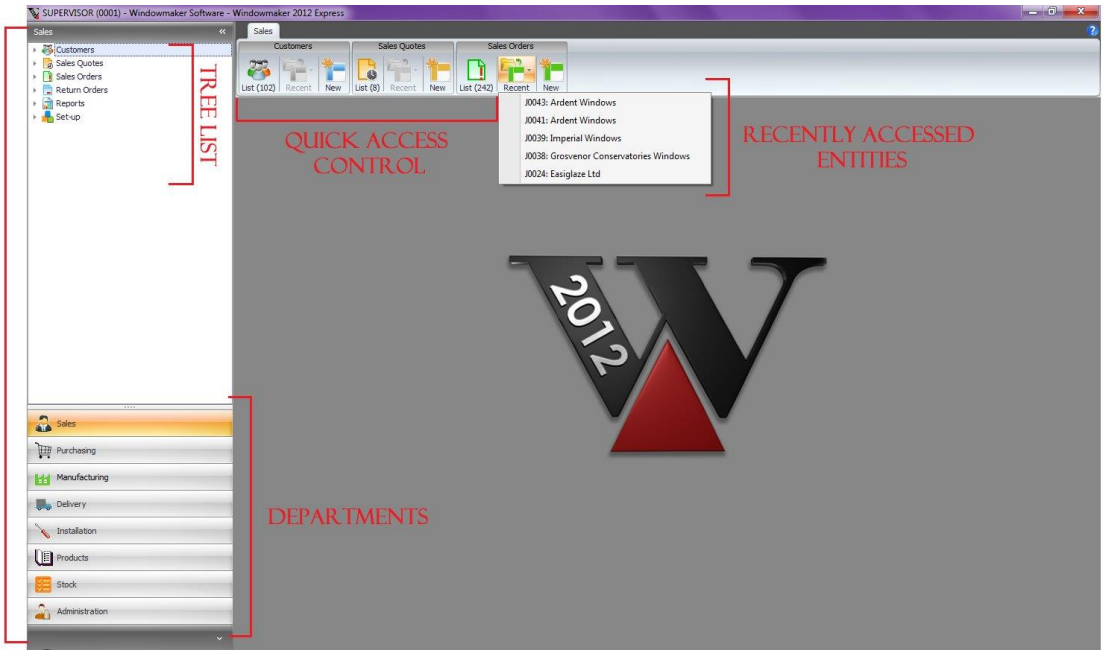
In this case, upgrading to Windowmaker 2012 is a two-step process:

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



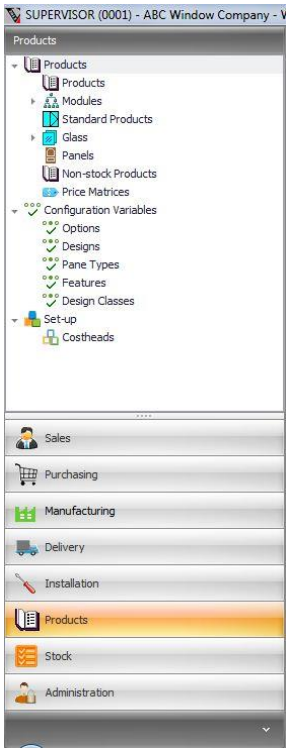
There are three main sections in the main window:

- Navigation Pane
- 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

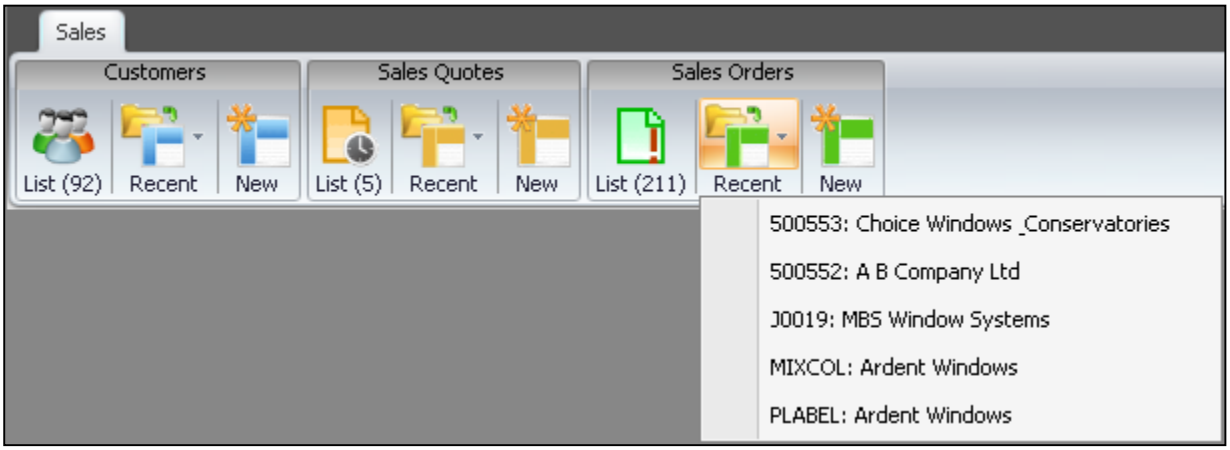
A **TreeList** is associated with each department. For a particular department the main entities, relevant features, activities and reports are listed as **Nodes** or **Sub-Nodes** within the tree list. The availability of the nodes depends on the product, licensed options and the rights of the user 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.



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.

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.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.

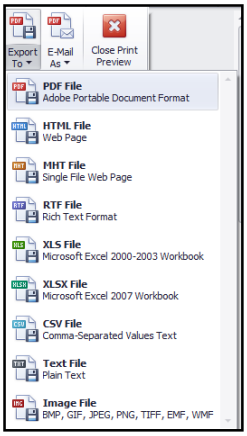
Important Note: Please refer to the**Windowmaker 2012 Upgrade Guide**for more details on each of the above and any pre-requisites or repercussions' of upgrading to Windowmaker 2012.

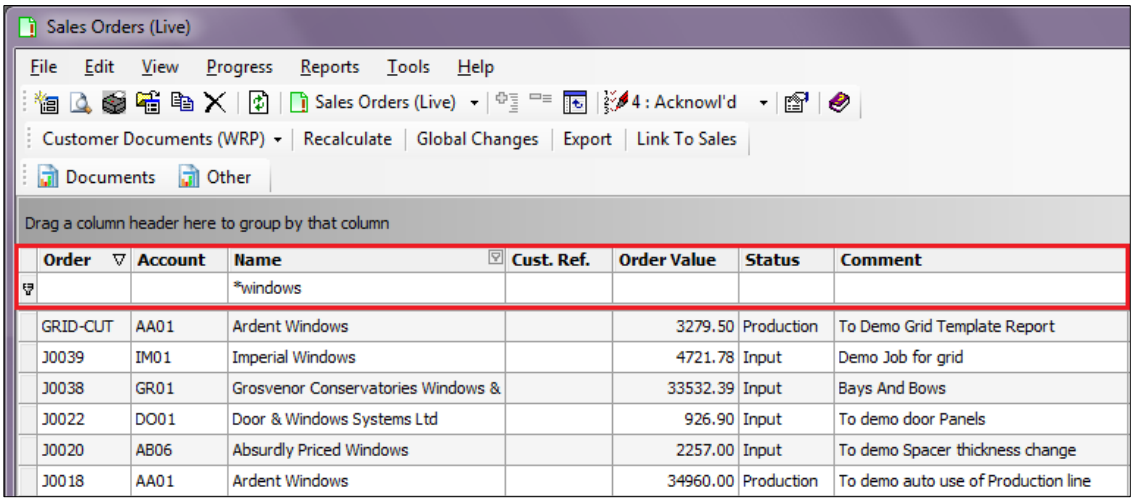
Set-up Forms

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.





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.

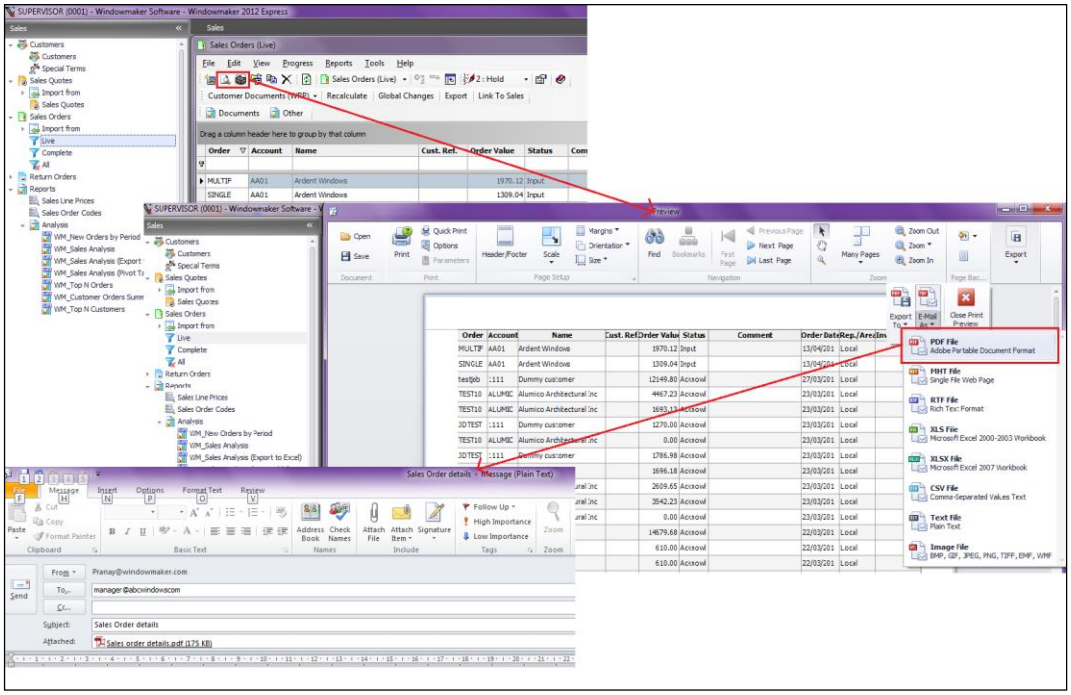
It is also possible to preview the 'report' (i.e. printout) before actually printing it using the Preview form.

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

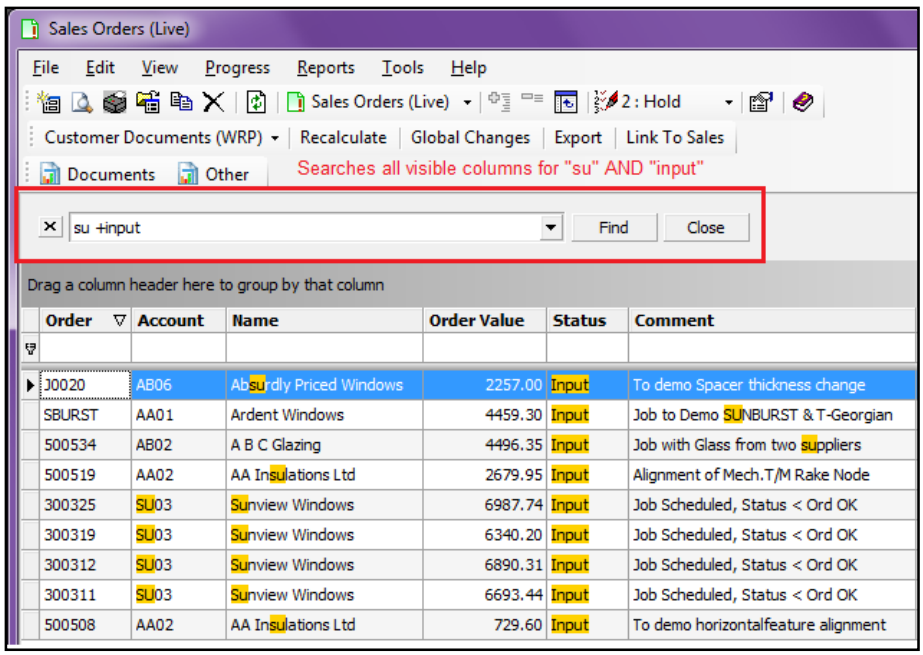
▲ Search through the contents

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.



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.

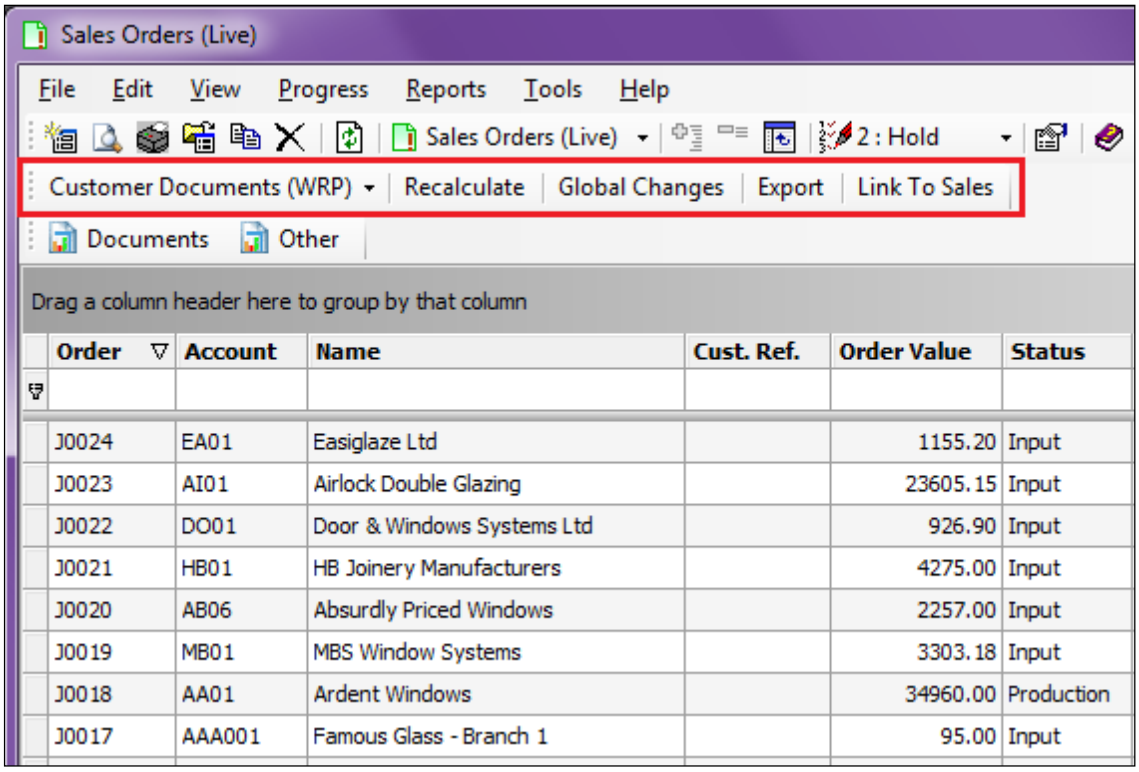
Sales Quote/Order 'Processes'

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.

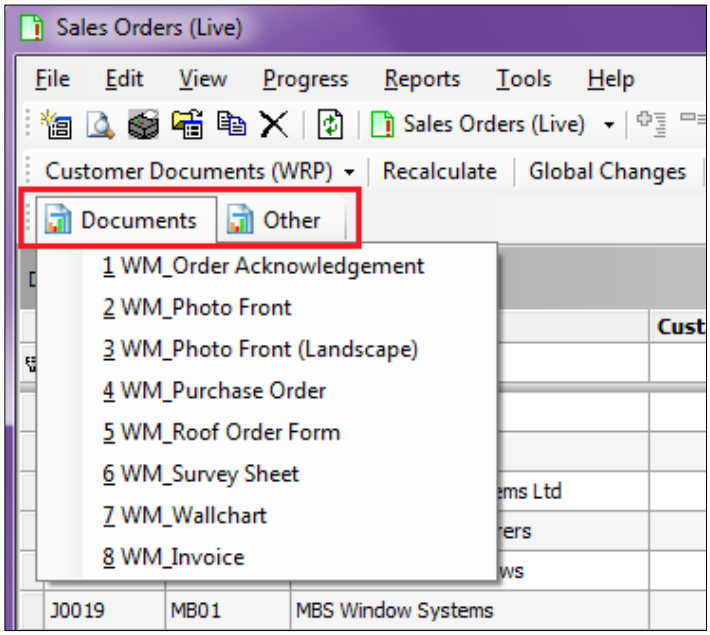


Order	Account	Name	Cust. Ref.	Order Value	Status
J0024	EA01	Easiglaze Ltd		1155.20	Input
J0023	AI01	Airlock Double Glazing		23605.15	Input
J0022	DO01	Door & Windows Systems Ltd		926.90	Input
J0021	HB01	HB Joinery Manufacturers		4275.00	Input
J0020	AB06	Absurdly Priced Windows		2257.00	Input
J0019	MB01	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

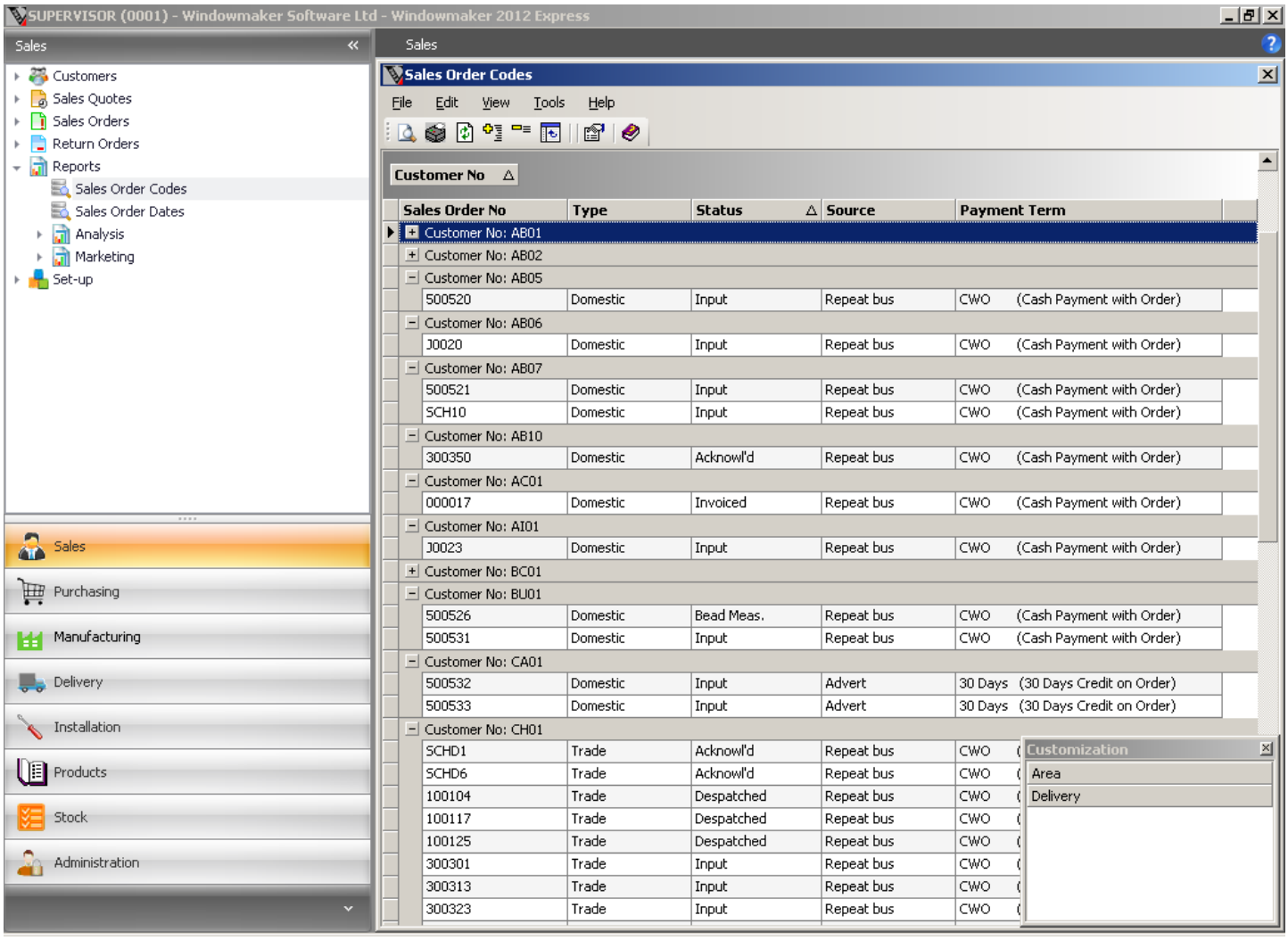
Like Windowmaker 5, it is possible to run crystal reports from the Sales Quote/Order Set-up form on the selected Quotes/Orders. However, the reports are grouped into categories for easier access. It is possible to specify a category for each custom report by changing the report (.RPT) file name according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

See Help file for details of RPT file naming convention.



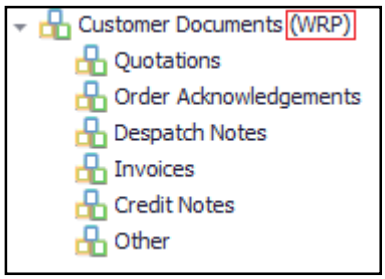
Views

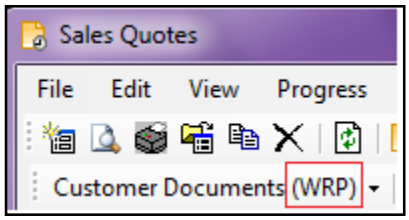
You can create Views in Windowmaker database, which will be listed under 'Reports' in the relevant Department. For this, the View name must conform to a particular naming convention. The View will be displayed in a grid, which means all the standard features viz. grouping, sorting, filtering, searching,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

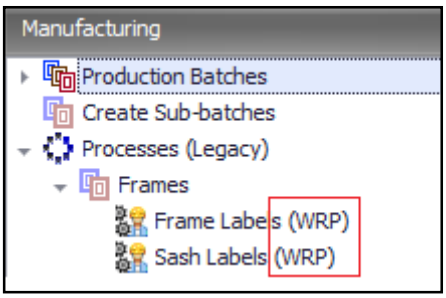


This proves to be a very handy tool to develop simple list type reports, seamlessly integrated and accessible from within Windowmaker. Views can be created in the Windowmaker SQL database using the SQL Server Management Studio with very basic knowledge of the database system. This way the dependency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





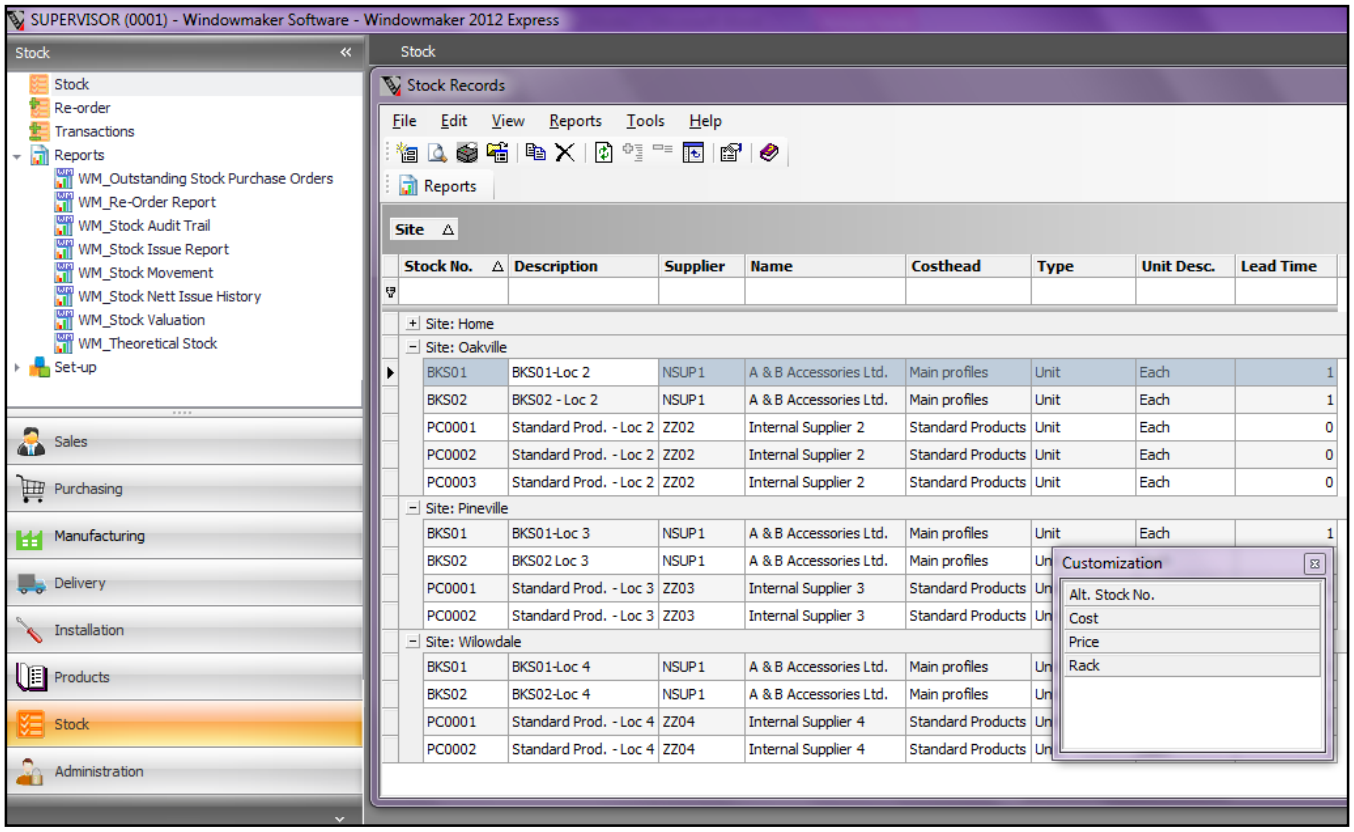


The Windowmaker Native Reports are documents/reports that are designed using Windowmaker. These are Customer Documents (viz. Quotations, Order Acknowledgements, Invoices, Credit Notes, and Despatch Notes), Delivery Notes, Frame Purchase Order and Frame/Sash Labels. These are denoted with "(WRP)" wherever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

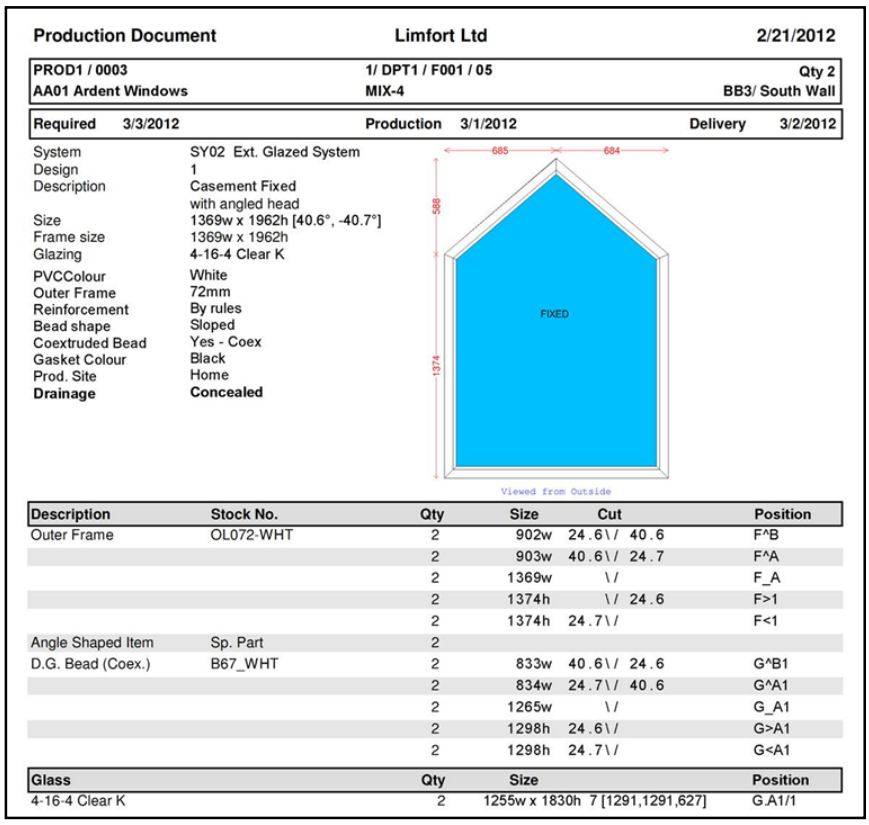
The Stock (and Non-Stock) Set-up form is redone to use the grid for a consistent, easy to use and efficient interface. This means all the standard features viz. grouping, sorting, filtering, searching, printing and exporting can be applied on the data displayed in the grid.



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 Document

ABC Ltd
Meadway House,
17, Brighton road,
Surbiton Surrey,
KT6 5LR
UK
Tel. ++44 0208 390 6147 Fax ++44 0208 390 6147
Email info@windowmaker.com

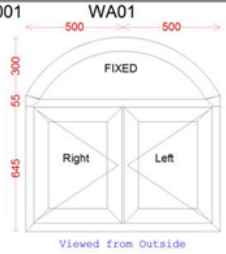
Quotation

To	Deliver to
Ardent Windows 7 Lustrum Avenue Portrack Lane Stockton On Tees Cleveland TS18 2RB	7 Lustrum Avenue Portrack Lane Stockton On Tees Cleveland TS18 2RB

Quote No.	Date	Customer Ref.	Responsible
Q0007	21/02/12		Chris

Dear Mr. Smith,
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 1-OFF with arched head 1000w x 1000h [r=567] 4-12-4 Clear PVC Colour White T-Joins Welded Outer Frame 72mm Transom/Mullion 70mm T-Sash (C'mnt) 75mm Flyscreen No Handle Colour White Handle (C'mnt) Cockspur	1	750.25	0.00	750.25



Quotation

Stock Nett Issue History — **ABC Windows Ltd** — **2/20/2012**

Site 1 Home
Supplier NSUP1
Stock No. 10" TH HS - 24" TH STD
Date 3/20/2011 - 3/19/2012

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.

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.

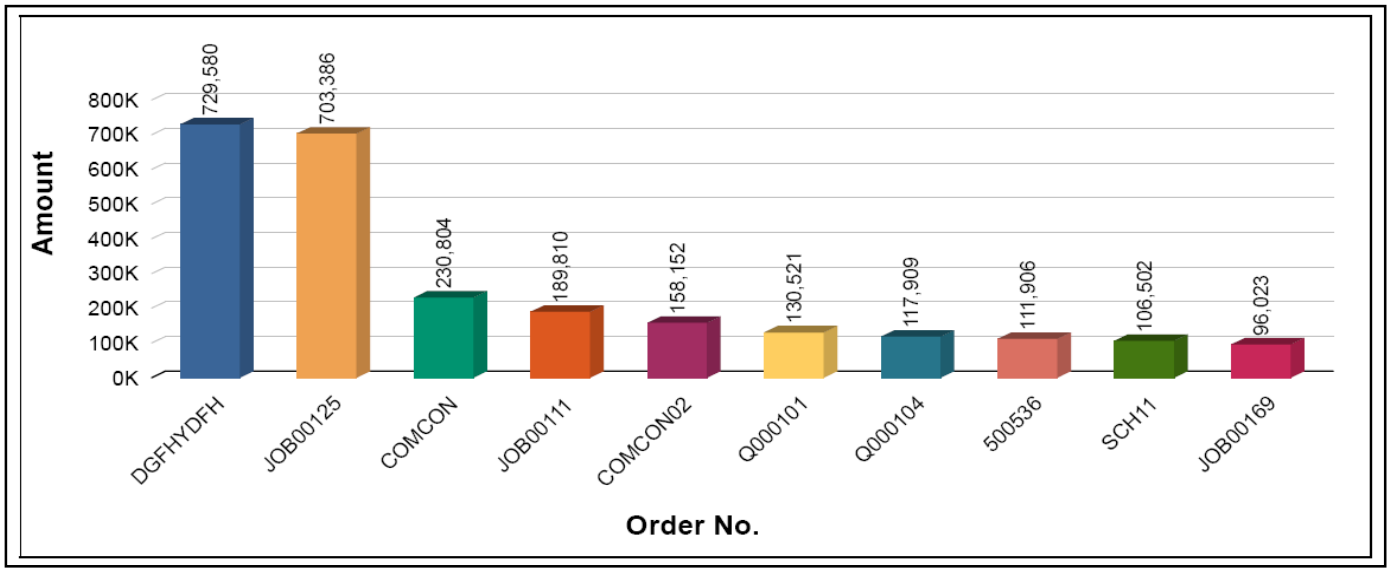
The report is useful in carrying out revenue analysis and lists the customers/orders contributing highest revenues in a particular period of time.

Top 10 Customers **ABC Windows Private Limited** **28-11-11**

Invoiced Date 23-11-10 - 23-11-11 Order Type All
Source All Area All

Customer	Name	Amount	No. Orders	Area	Order Type	Responsible
AA01	Ardent Windows	2,119,170.93	67	Local	Domestic	Chris
AA09	Indigo Design & Engg Associates Pvt Lmtd	894,314.04	3	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
AAAA0000	Arthur Andrews Windows Design & Products	135,517.40	3	South	Commercial	Manager
CH01	Chipwell Glass	130,672.37	21	North	Trade	
GR01	Grosvenor Conservatories	99,417.18	12	North	Trade	
SU03	Sunview Windows	88,085.02	12	GY	Trade	John
TOTAL		**4,882,233.48**	**160**			

Top N Customers – List Representation

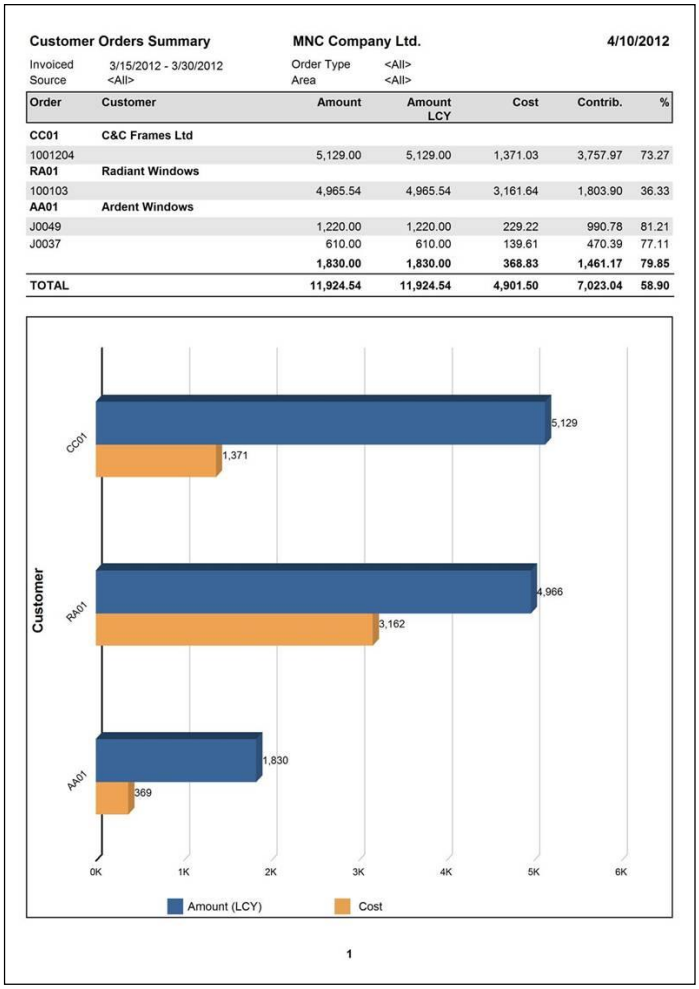


Top N Orders – Graphical Representation

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.



Customer Orders Summary MNC Company Ltd. 4/10/2012

Invoiced 3/15/2012 - 3/30/2012 Order Type <All>
Source <All> Area <All>

Order	Customer	Amount	Amount LCY	Cost	Contrib.	%
CC01	C&C Frames Ltd					
1001204		5,129.00	5,129.00	1,371.03	3,757.97	73.27
RA01	Radiant Windows					
100103		4,965.54	4,965.54	3,161.64	1,803.90	36.33
AA01	Ardent Windows					
J0049		1,220.00	1,220.00	229.22	990.78	81.21
J0037		610.00	610.00	139.61	470.39	77.11
		1,830.00	1,830.00	368.83	1,461.17	79.85
TOTAL		11,924.54	11,924.54	4,901.50	7,023.04	58.90

Customer Order Summary – Graphical Representation

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.

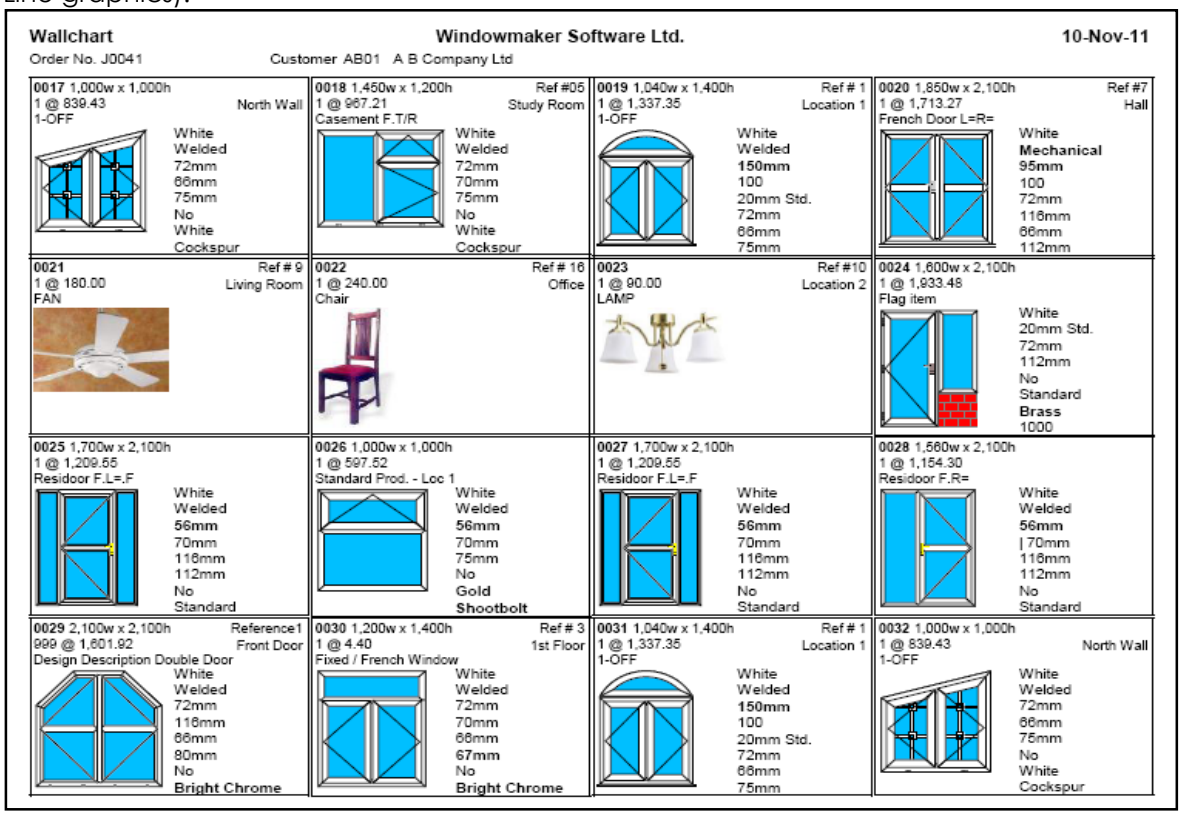
New Orders by Period **Windowmaker Software Ltd** **11/17/2011**

Ordered 10/01/2011 - 10/31/2011 Order Type All
Source All Area 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

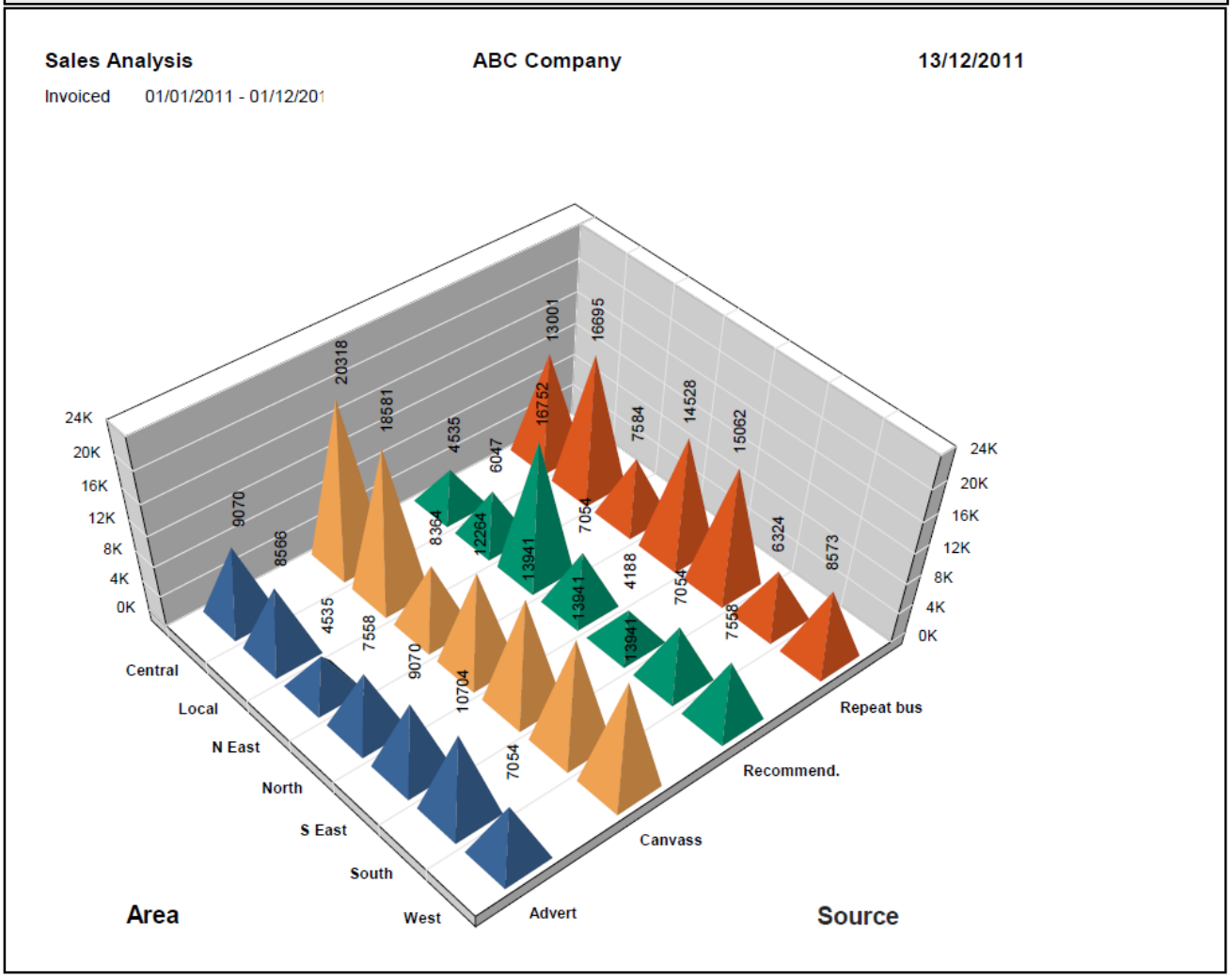
Three new Sales Analysis crystal reports are now available:

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.

Sales Analysis **ABC Company** **13/12/2011**

Invoiced 01/01/2011 - 01/12/201

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



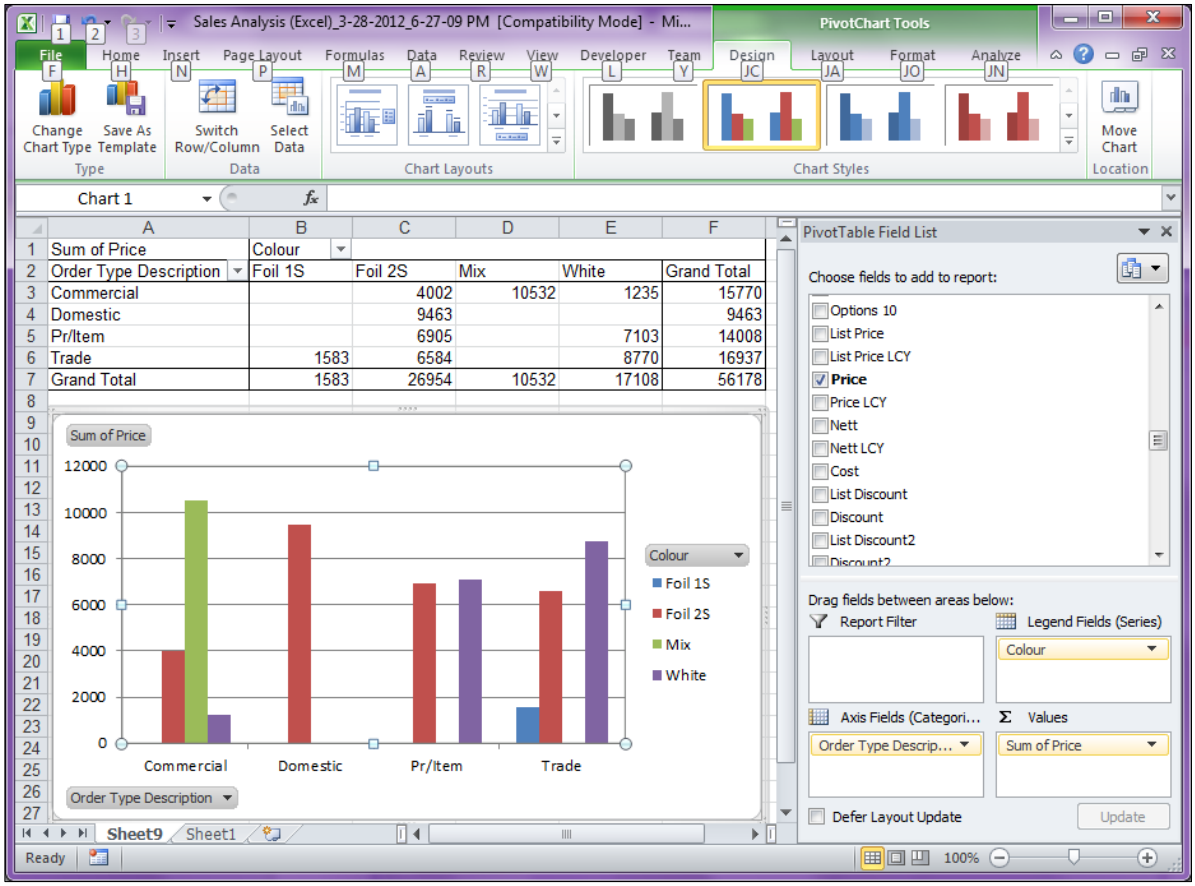
2. **Sales Analysis (Pivot Table) –** This is a similar report but the 'list' is formatted in a way that can be exported to MS Excel and the data can be analysed further easily using pivot tables and pivot charts in MS Excel.

Sales Analysis **ABC Company Ltd.** **4/12/2012**

Invoiced 4/1/2012 - 4/12/2012
Source - Area

	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

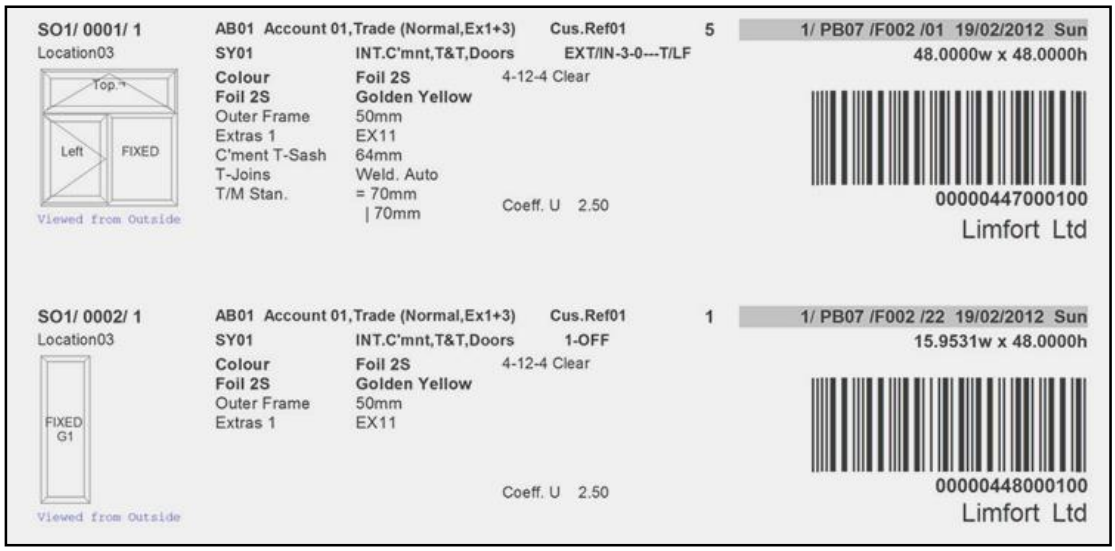
New Crystal Reports that can print summary of the components required for a:

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.



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.

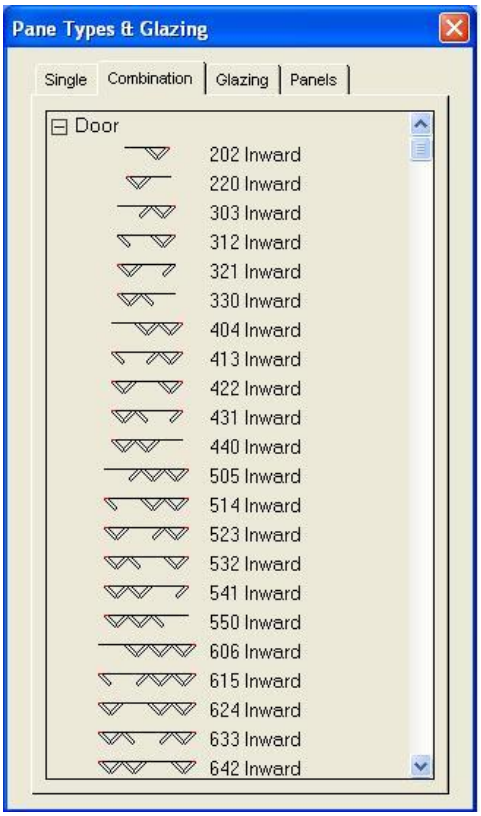
In **Windowmaker 2012**, for Option Answers set-up in COL file, the program allows abbreviation with asterisk(s) (i.e. '*'). The program also allows an Option to be associated with each '*' in the abbreviation. Each '*' in the abbreviation is replaced with the abbreviation of the answer of the corresponding 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.

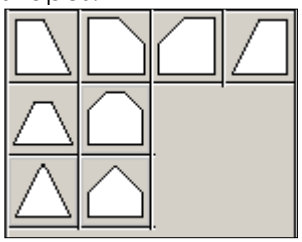
Note: The availability of the folding door combination pane types is subject to appropriate data set-up. Refer Help file for more details.


Pane Types & Glazing
Single
Combination
Glazing
Panels
Door
202 Inward
220 Inward
303 Inward
312 Inward
321 Inward
330 Inward
404 Inward
413 Inward
422 Inward
431 Inward
440 Inward
505 Inward
514 Inward
523 Inward
532 Inward
541 Inward
550 Inward
606 Inward
615 Inward
624 Inward
633 Inward
642 Inward

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

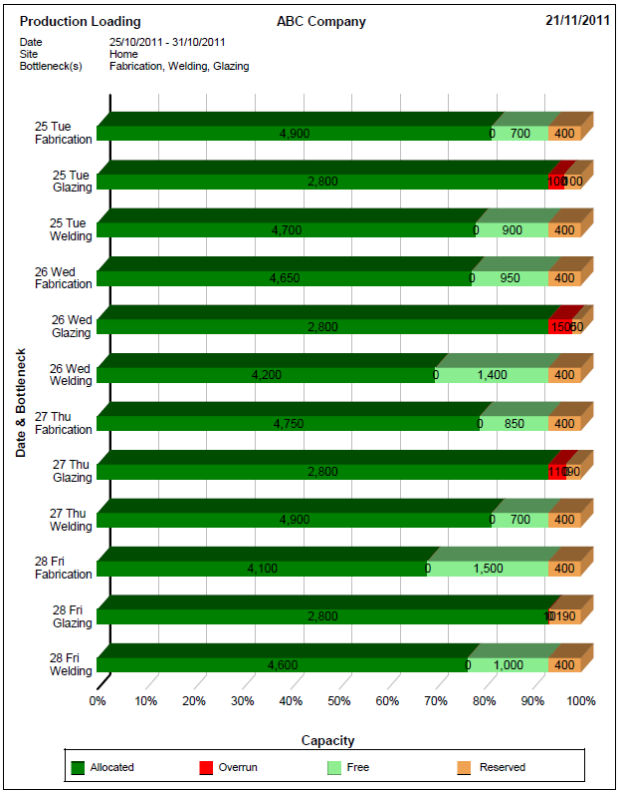
Print a report to show the production loading using bar charts for specified work centres on the production floor.

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.