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## 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.

When upgrading please also refer to below documents for changes since your current version:

If your current version is	What's New	Release Notes
Windowmaker 2018 (v7.x)	<a href="http://www.windowmaker.com/EN/PDF/Windowmaker%202018%20(v7.x)%20Whats%20New.pdf">www.windowmaker.com/EN/PDF/Windowmaker%202018%20(v7.x)%20Whats%20New.pdf</a>	<a href="http://www.windowmaker.com/EN/PDF/Windowmaker%202018%20(v7.x)%20Release%20Notes.pdf">www.windowmaker.com/EN/PDF/Windowmaker%202018%20(v7.x)%20Release%20Notes.pdf</a>
Windowmaker 2012 (v6.x)	<a href="http://www.windowmaker.com/EN/PDF/Windowmaker%202012%20(v6.x)%20Whats%20New.pdf">www.windowmaker.com/EN/PDF/Windowmaker%202012%20(v6.x)%20Whats%20New.pdf</a>	<a href="http://www.windowmaker.com/EN/PDF/Windowmaker%202012%20(v6.x)%20Release%20Notes.pdf">www.windowmaker.com/EN/PDF/Windowmaker%202012%20(v6.x)%20Release%20Notes.pdf</a>
Windowmaker 5 (v5.x)	<a href="http://www.windowmaker.com/EN/WhatsNew.aspx">www.windowmaker.com/EN/WhatsNew.aspx</a>	



**General Enhancements**

**Reports - Look & Feel**

Based on feedback from several users, following aesthetic changes have been made to the standard Windowmaker reports to make them more user-friendly.

- ▲ Report title is now at centre to make it more prominent
- ▲ For all tabular reports, alternate row shading is now eliminated and gridlines are introduced to increase readability.

Before upgrade:

<b>Costing, Pricing</b>	<b>Windowmaker</b>	<b>20-04-2022</b>		
Costing Q00077/2				
Costhead	Base	+/-	Waste	Cost
Main profiles	10113.10	-809.30	153.45	9457.25
Beads	1545.66	-92.70	14.60	1467.56
Gaskets	1292.34	0.00	12.95	1305.29
Accessories	6220.00	-186.60	0.00	6033.40
Generic Hardware	28000.00	-840.00	0.00	27160.00
Glass -BTO	14204.38	0.00	0.00	14204.38
Fabricat'n labour	536.82	0.00	0.00	536.82
Inst. Material	34167.37	0.00	0.00	34167.37
Packing Material	3500.00	0.00	0.00	3500.00
Main profiles-2	4074.60	0.00	57.54	4132.14

After upgrade:


<b>Windowmaker</b>	<b>Costing, Pricing</b>	<b>20-04-2022</b>		
Costing Q00077/2				
Costhead	Base	+/-	Waste	Cost
Main profiles	10113.10	-809.30	153.45	9457.25
Beads	1545.66	-92.70	14.60	1467.56
Gaskets	1292.34	0.00	12.95	1305.29
Accessories	6220.00	-186.60	0.00	6033.40
Generic Hardware	28000.00	-840.00	0.00	27160.00
Glass -BTO	14204.38	0.00	0.00	14204.38
Fabricat'n labour	536.82	0.00	0.00	536.82
Inst. Material	34167.37	0.00	0.00	34167.37
Packing Material	3500.00	0.00	0.00	3500.00
Main profiles-2	4074.60	0.00	57.54	4132.14

**Customer Documents: Footer Logo**

It is now possible to include a full width footer logo also in all standard customer and supplier documents. The dimensions of the footer logo image should be as given below.

Report Name	Height	Width
Quotation Order Acknowledgement Invoice Brand Summary	2 cm	19.6 cm
Survey Sheet Design Summary Purchase Order Glass Order	1 cm	

**Windowmaker**  
2nd Floor, Kalajai Avenue  
20 Punji Nagar  
Old Padra Road  
Vadodra - 390 015



### Quotation

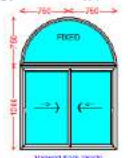
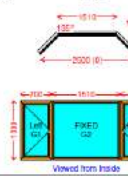
To		Deliver to	
<b>Mr. Ajay Gautam</b> A-404, Mayapuri Industrial Area, Ph-I, New Delhi 110064 INDIA		A-404, Mayapuri Industrial Area, Ph-I, New Delhi 110064 INDIA	
Quote No.	Customer Ref.	Quote Date	Sales Person - John
Q00077/2	R0029	20-04-2022	+912655243692 sales@windowmaker.com

Dear Mr. Ajay,




Thank you for giving my company the opportunity to provide you with the following quotation.

My company have been installing windows and doors for over 10 years. We pride ourselves on our level of customer satisfaction and service. This is borne out by the high number of recommendations that we receive from our customers.

If there is any further information that you would like to have, please contact on the above number.

Sales Line	Details	Qty	Rate	Amount
0001 	W1 Living Room Slider System F/ XIG 1500w x 2050h [L=750] 6mm Clear Colour Fittings Suppl Handle Colour	3	32726.76	98180.28
0002 	W2 Bedroom 1 Hinge Int Giz System Bay 3 Facet 2500w x 1300h (G1)6mm Clear (G2)6mm Toughened Colour Foli 2S Fittings Suppl Handle Colour	3	22063.35	66190.05

C/FWD ₹ 164970.33






Generated from Windowmaker Software

## Brand Summary

A Brand Summary report is now available. This lists all components that are used in a Sales Quote. This is particularly useful for commercial projects, for submitting to the builder/architect as part of negotiations.

**Windowmaker**  
198, Industrial Park  
Toronto ON M4J 1K2  
Canada  
Tel. +1-522-785-8566 Fax +1-522-885-6355  
Email info@windowsanddoors.com



### Brand Summary

To	
<b>Rob Parker</b> 102, New Street, Toronto, ON, Canada	
Quote No.	Customer Ref.
Q2018057	SB00098
Date	Sales Person - Matt
07/10/2018	+1-545-655-8569 matt@windowsanddoors.com
Description	Stock No.
PH Tech Frame	Window Frame 3022-05
	Sill 7000-05
	Head 7002-05
	Right Jamb 7004-D-05
	Left Jamb 7004-G-05
PH Tech Sash	C'ment T Sash 5701-05
	Center Stile 7506-05
	Fixd Panl Bot Rail 7508FDB-05
	Fixd Panl Top Rail 7508FGB-05
	Oper Panl Hor Rail 7508M-05
	Fixd Panl Sd Stile 7547F-05
	Oper Panl Sd Stile 7587M-05
PH Tech Hardware	Stud Bracket 10968
	Contour WHT Handle 11454
	Maxim Casement Trk 11576.92
	39In Tie Bar 119179200
	1.4 Maxim Max Ck 11970052

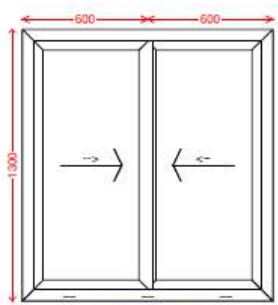
### Production Document

Production Document has been enhanced with below features.

- ▲ Allows Costhead filtering
- ▲ Improved performance
- ▲ New look & feel
- ▲ Includes plan view

<b>Windowmaker</b>		<b>Production Document</b>		<b>13-07-2018</b>
<b>J0246 / 0001</b>		<b>1/ J0246</b>		<b>Qty 1</b>
<b>AA01 Ardent Windows</b>				<b>W1/ Study</b>
<b>Required</b>	<b>19-07-2018</b>	<b>Production</b>	<b>18-07-2018</b>	<b>Delivery</b>

System	SYIN Internally Glazed	 <p style="font-size: small; text-align: center;">Viewed from Outside</p>
Design	500	
Description	Horizontal Slider	
Size	1200w x 1300h	
Glazing	4-16-4 Clear	

Description	Stock No.	Qty	Size	Cut
<b>Main Profiles</b>				
Slider Outer Frame	SL001-WHT	2	1200w	∖/
		2	1300h	∖/
Slider Sash	SL002-WHT	4	591w	∖/
		4	1232h	∖/
<b>Ancillary Profile</b>				
Head Cover	VS011	2	591w	
Interlock Profile	VS010	2	1232h	
<b>Beads</b>				
Bead	SL7009-W	4	497w	∖/
		4	1138h	∖/
<b>Reinforcement</b>				
Reinforcement	S00046	4	477w	
		4	1118h	
	S00004	2	1122w	
		2	1222h	
<b>Accessories</b>				
Comb. Pane Cost	Slider Comb Cost	1	1200w x 1300h	
Drainage Cap	Drainage Cap	3		
<b>Glass -supplier 1</b>				
4-16-4 Clear		2	487w x 1128h	

### Requirements Summary

The Requirements Summary Report now includes Size Unit and Weight. Printing Weight is optional.

<b>Windowmaker</b>		<b>Requirements Summary</b>		<b>20-04-2022</b>		
<b>Quote Q00077/2</b>		<b>CUST02 Mr. Ajay Gautam</b>		<b>Cust. Ref. R0029</b>		
Description	Stock No.	Qty	Size	Unit	Cost	Weight (kg)
<b>Gaskets</b>						
BlackLeg/Sash Gasket	G005-B	14	50962	mm	514.73	1.520
Glazing Tape	GTAPE	2	10528	mm	106.34	0.160
Sash Gasket	S001	8	67744	mm	684.22	3.380
<b>Accessories</b>						
Cavity Locking Block	CBLOCK01	32		pcs	310.40	0.640
Cav Lckng Bkck Scrw	CBLOCKSCRW	64		pcs	620.80	0.510
Scrw fr Couplr Rein.	COUPLRREINSCF	42		pcs	407.40	0.290

### Purchase Order and Glass Order

These reports now allow records to be sorted in the ways listed below:

Glass Order	Purchase Order
Sales Order/Glazing/Size	Sales Order/Size
Sales Order/Sales Line	Sales Order/Sales Line
Glazing/Size	Size
Trolley/Slot	Trolley/Slot

A new Setting 'Include Position' is now available for Purchase Order and Glass Order reports. Unchecking this will collate glasses of the same type and size within the same sales line.

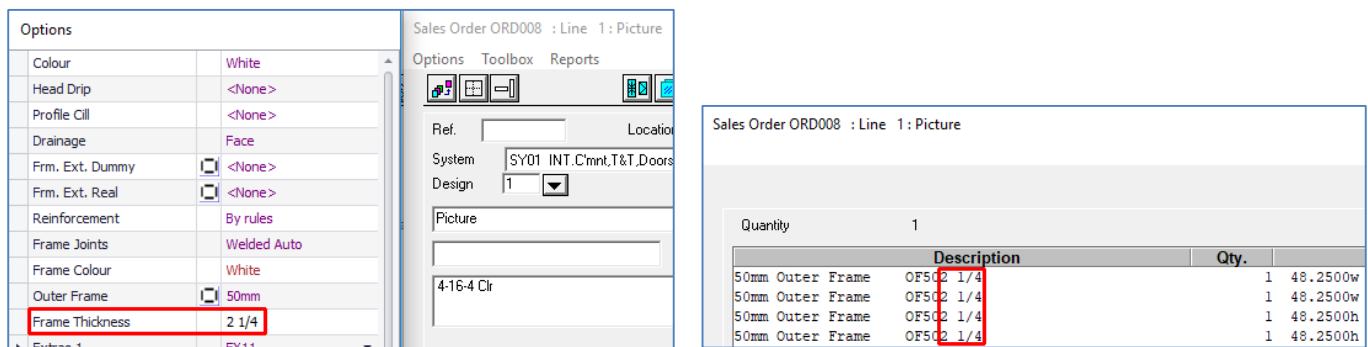
### Order Entry - Variable profile width

The program now allows to specify the width of profiles during order entry, in imperial data also.

This is useful in cases like:

- ▲ Timber windows where different thickness profiles can be cut from the same block
- ▲ Sealed Units where spacer thickness can be specified during order entry
- ▲ Entrance doors with side panels so that standard size slabs can be used by varying the mullion size. This serves as an alternative to trimming slabs (Requires Entrance Door Option)

Refer help topic 'How to change the width of a profile during order entry?' for more details.



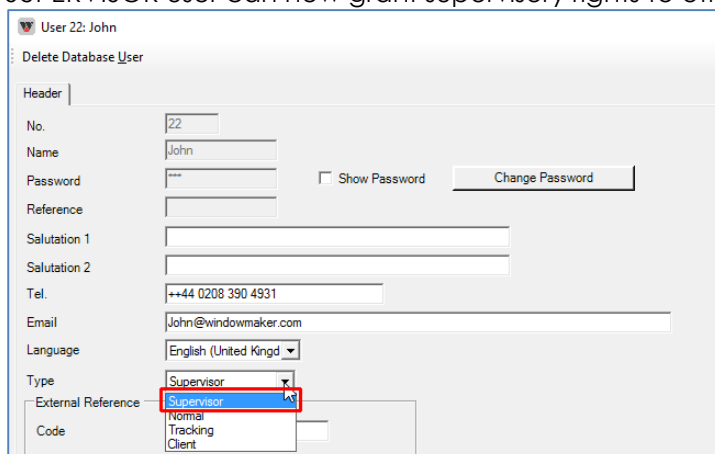
The screenshot shows the 'Options' panel on the left with 'Frame Thickness' set to '2 1/4'. The main window displays 'Sales Order ORD008 : Line 1: Picture' with a table of items. The table has columns for 'Quantity', 'Description', and 'Qty.'. The 'Description' column contains '50mm Outer Frame OF502 1/4' repeated four times. The '2 1/4' value in the description is highlighted with a red box.

### Login

The program now remembers the last user login name, enabling faster login.

### Users

SUPERVISOR user can now grant supervisory rights to other users.



The screenshot shows the 'User 22: John' profile form. The 'Type' dropdown menu is open, showing 'Supervisor' selected and highlighted with a red box. Other fields include 'No.' (22), 'Name' (John), 'Password' (masked), 'Reference', 'Salutation 1', 'Salutation 2', 'Tel.' (+44 0208 390 4931), 'Email' (John@windowmaker.com), 'Language' (English (United Kingd)), 'External Reference' (Supervisor), and 'Code' (Normal, Tracking, Client).



### Glazing

It is now possible to override spacer thickness during order entry in Imperial data also. This helps to reduce the number of glass records to be set-up.

A '\*' in the long description will be replaced with the spacer thickness (in imperial fraction) specified during order entry, and '#' with the total thickness of the sealed unit in inches and fraction. These facilities are already available in metric data.

Refer help topic 'How to override the Glass Spacer Thickness during Order Entry?' for more details.

Glazing: 102 : BTO 6mm-\*6mm #

Header	Configuration	Attributes	Limits
Catalog	Glazing		
ID	102		
Stock No.	6mm-*6mm #		
Description	6-*6 #		
	6mm-*6mm #		
Type	Sealed Unit - Double Glazed		
Costhead	15 : Glass -supplier 1		

Glazing Specification

Supplier	SUP1 : Toronto Glass Ltd		
Glass	Pattern	Process	
Type	102 :6mm-*6mm #	<None>	829 :Argon
Composition	Pattern	Process	
Leaf 1 (Outside)	6mm Clear	<None>	<None>
Spacer	00 1/2	<None>	<None>
Leaf 2 (Inside)	6mm Clear	<None>	<None>

Sales Order J000056 : Line 1 : Double Hung Standard

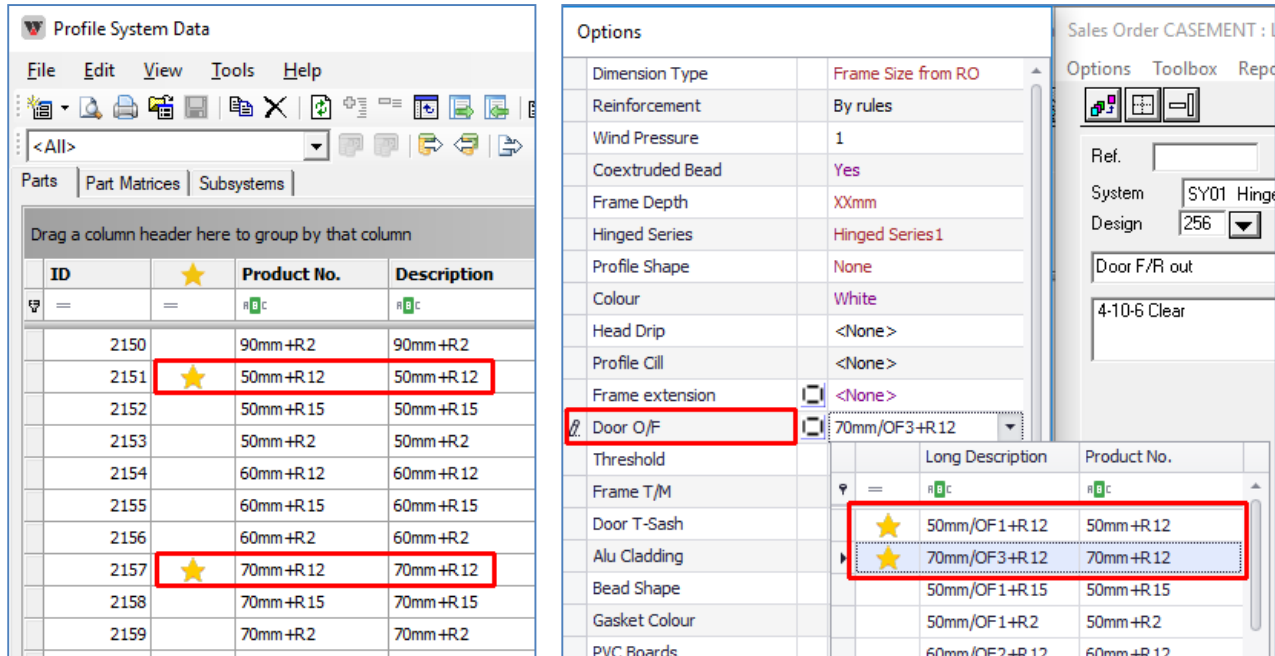
Options    Toolbox    Reports

Ref.	Location
System	SY21 Vertical Slider
Design	450
Double Hung Standard	
6mm-1/2-6mm 1 Argon	



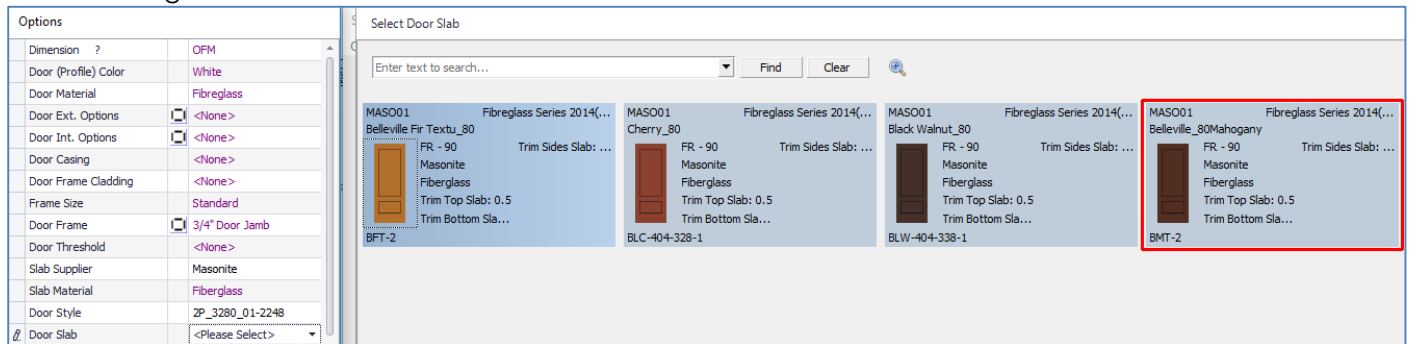
### Products - Add to Favorites

The program now allows to set products which are popular/frequently used as Favorites, for 'Part Filter' type options. All favourite products will be listed at the top, making order entry fast. This facility is currently available for Parts, Door Styles, Door Slabs and Glass Inserts.

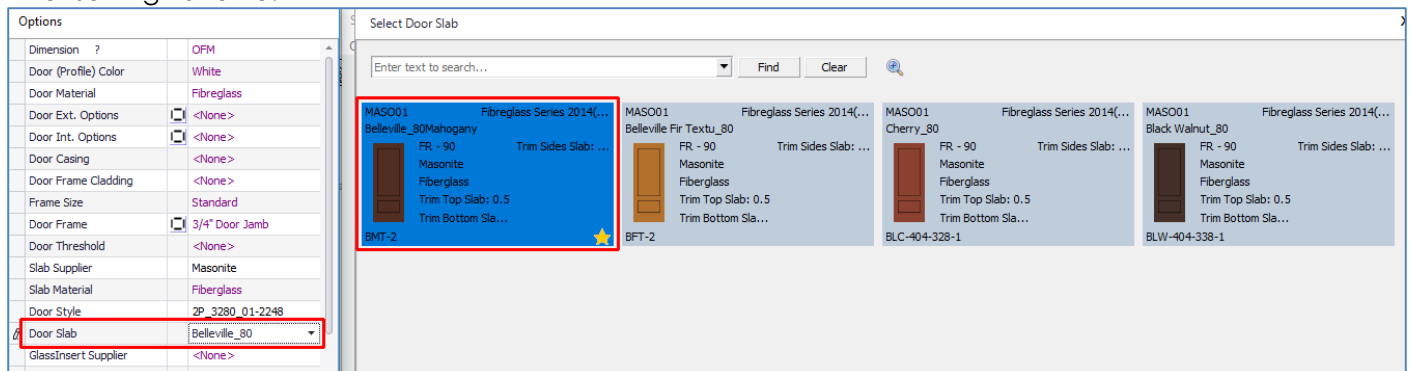


ID	★	Product No.	Description
2150		90mm+R2	90mm+R2
2151	★	50mm+R12	50mm+R12
2152		50mm+R15	50mm+R15
2153		50mm+R2	50mm+R2
2154		60mm+R12	60mm+R12
2155		60mm+R15	60mm+R15
2156		60mm+R2	60mm+R2
2157	★	70mm+R12	70mm+R12
2158		70mm+R15	70mm+R15
2159		70mm+R2	70mm+R2

Before setting Favorite:



After setting Favorite:

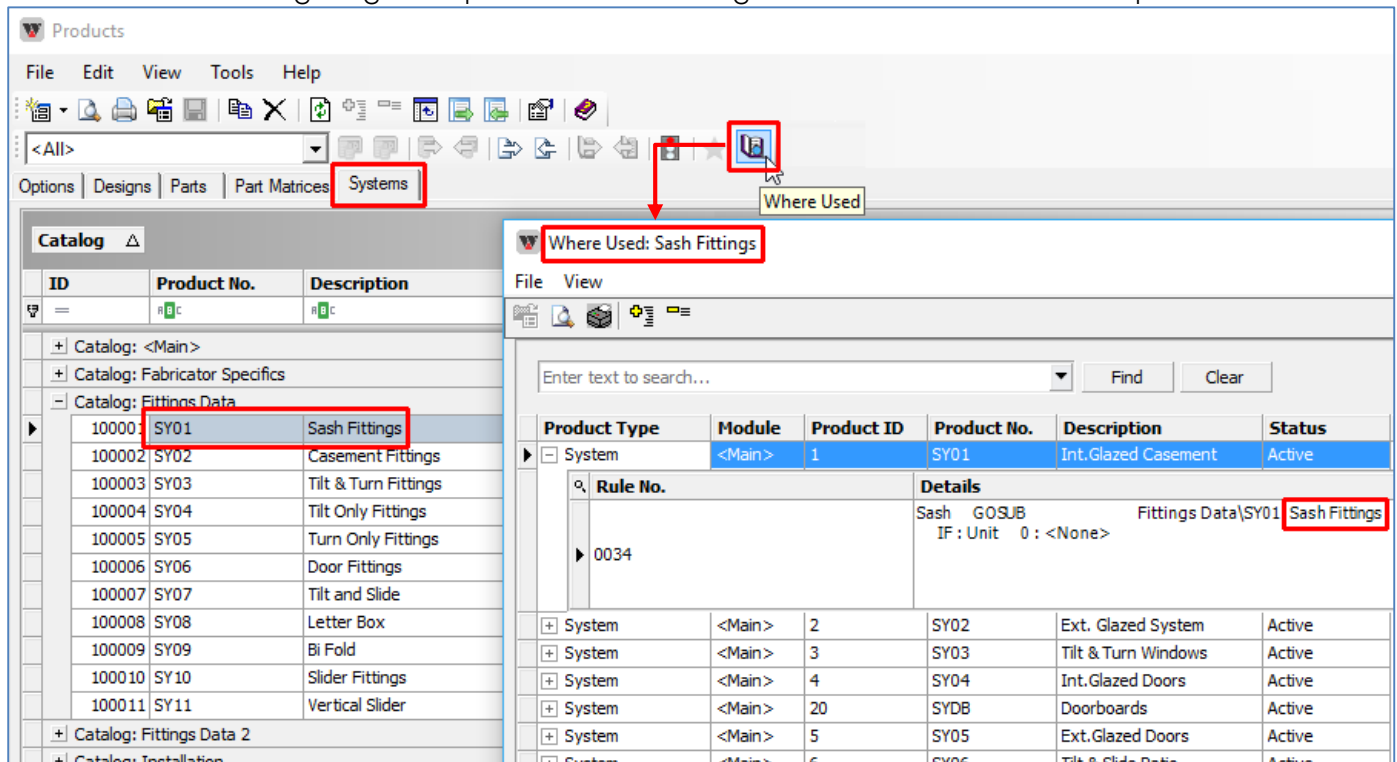


### Products - Where Used

The 'Where used' feature is now available for Designs, Part Matrices and Systems. The 'Where used' information can be:

- ▲ Printed, exported, emailed
- ▲ Searched, filtered, grouped, sorted

This facilitates reviewing usage of a product and handling relevant technical data set-up.



### Tools - Migrate Data

Facility to migrate data to a new database or database server, is now available for all Windowmaker products. This can be done using Administration → Tools → Migrate Data. Earlier this was not available for Windowmaker Life & Windowseller.

The facility is useful to:

- ▲ Upgrade to a higher Windowmaker product e.g. Windowmaker Life to Windowmaker Express
- ▲ Upgrade to a higher SQL product e.g. SQL Express to SQL Server
- ▲ Transfer database from one computer to another e.g. to format the server
- ▲ Archive Windowmaker data at the start a new financial year

### SQL Server support

Windowmaker now supports SQL Server 2017.

Sales Client synchronization with central database is now also supported for both SQL Server 2016 and 2017. Synchronization requires both server and client to have same version of SQL Server.

Windowmaker no longer supports SQL Server 2005.

Refer [Technical Requirements](#) for more details.



### New Dongle Driver

The Windowmaker products now use new dongle driver (v7.47). These are installed and upgraded automatically when installing Windowmaker 2018 R2.1.

Users using a server dongle **must manually install the new driver** on the computer where the dongle is attached if Windowmaker is not installed on that computer. Please contact [help@windowmaker.com](mailto:help@windowmaker.com) for a copy of the new server driver.

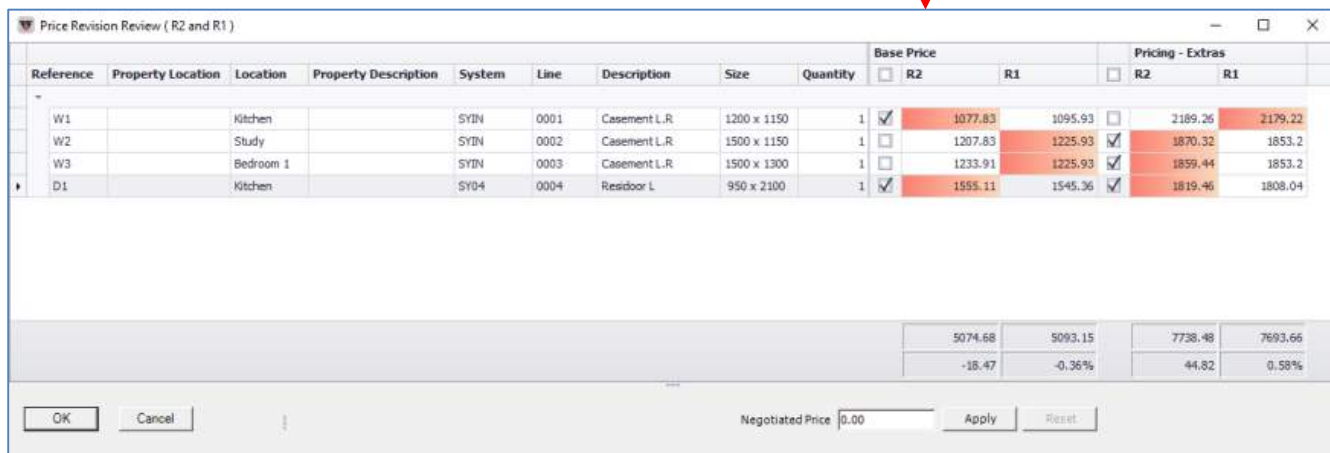
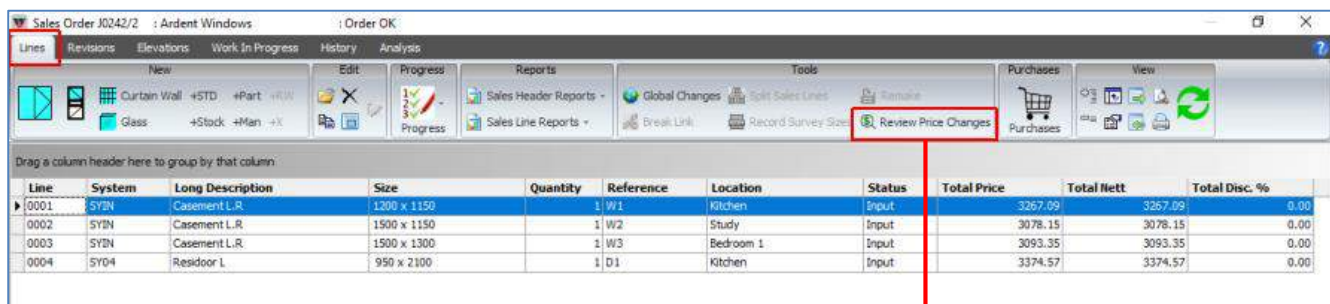
### Enhancements to Options

#### Revisions

For Orders, it is now possible to compare the price of the latest revision with that of the previous one.

For each Sales Line in the latest revision, Windowmaker allows to:

- Keep the recalculated prices
- Retain the original base price and/or extras price, instead of the recalculated ones
- Override the recalculated base price with a negotiated price



### Surveying - Link to WM Measure

Link to WM Measure report is now available for Surveyors using Windowmaker Survey Client.

The report can be used 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.

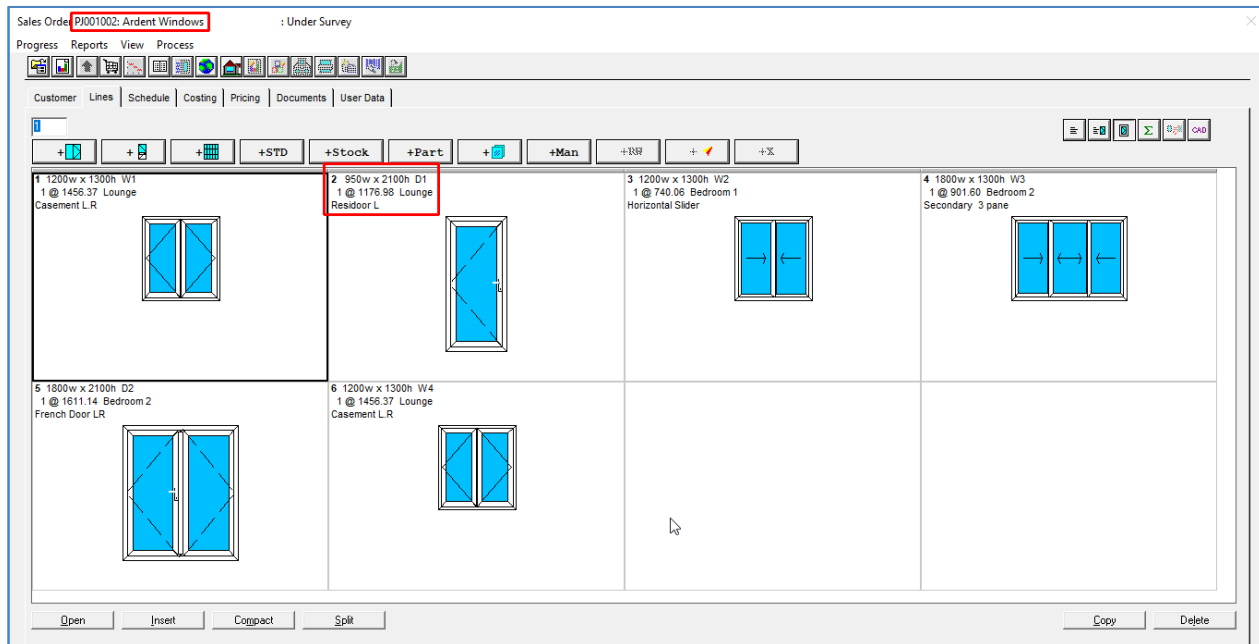
It now also transfers the sales line specification to the app. This way the Surveyors get the details electronically and can also communicate the surveyed details back to the office.

## What's New

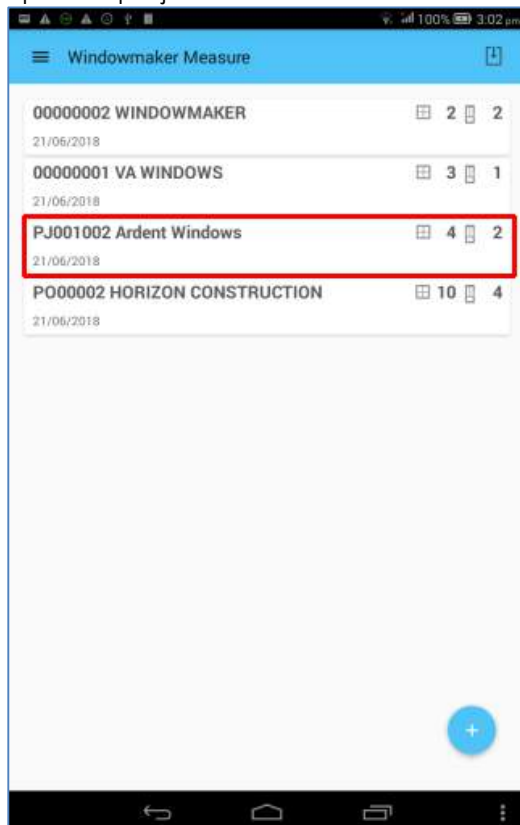
### Benefits:

- ▲ Avoids sending physical survey sheets to and from surveyors
- ▲ Eliminates travelling (time and money) of surveyor to office to get survey sheets
- ▲ Saves time and avoids errors by importing the Windowmaker Order as a Project in Windowmaker Measure
- ▲ Eliminates manual entry, speeds up the process and reduces possibility of errors
- ▲ Automatically calculates manufacturing sizes and sends them electronically, reducing costly remakes

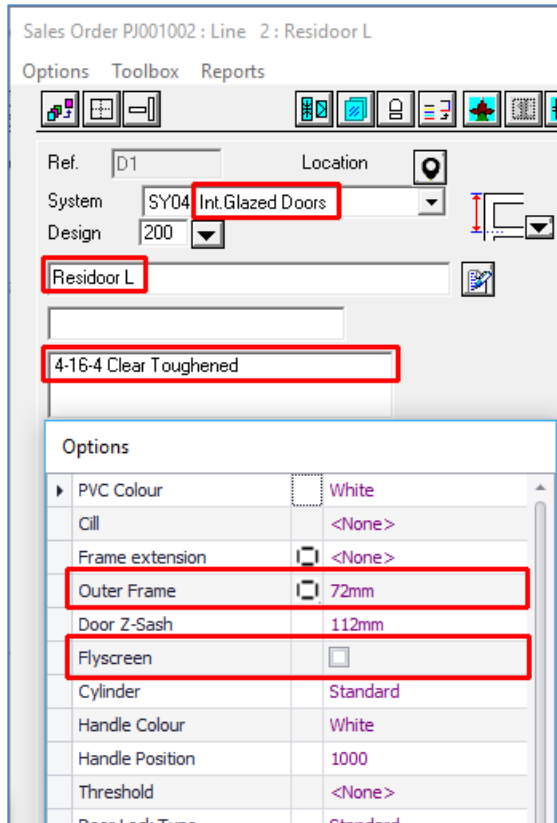
### Sales Lines in Windowmaker:



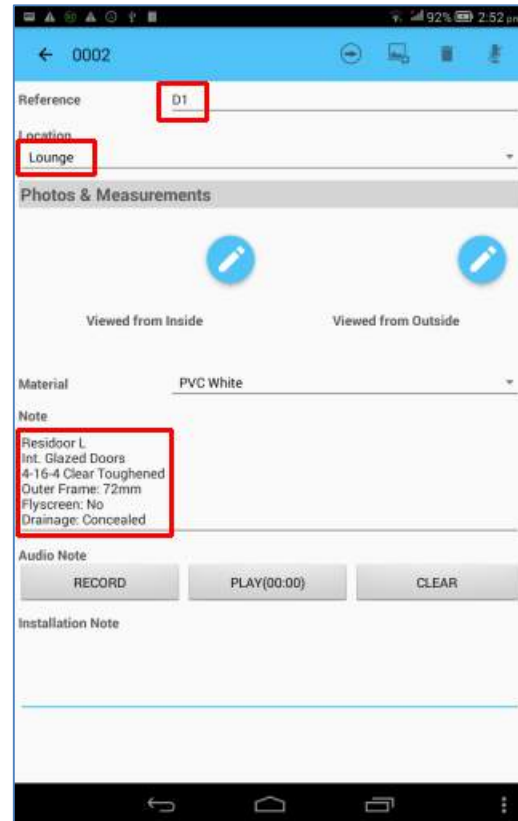
### Imported project in Windowmaker Measure and items in it:



Sales Line details in Windowmaker:



Details reflected in Windowmaker Measure:



### Multiple Sites, Production Scheduling, Delivery Scheduling

The program now allows to change the default Route, and hence the default Production and Delivery Sites, for a Sales Order that is not yet scheduled.

### Link to Saw

Windowmaker can now link to:

- ▲ LGF Gamma saw
- ▲ OZGENC Makina OMRM 113

### Link to Working Centre

Working centre links, via post processor settings, now allow to:

- ▲ Include/exclude lines from Labels
- ▲ Upload the generated link files to a FTP site

Windowmaker can now link to Wegoma Supercut 6 working centre.

### Enhancements to Products – Windowmaker SQL, Windowmaker ERP

#### Errors & Warnings

Windowmaker now allows to:

- ▲ Set-up 'severe' Warnings
- ▲ Grant a new right 'Override Severe Warnings' to Users

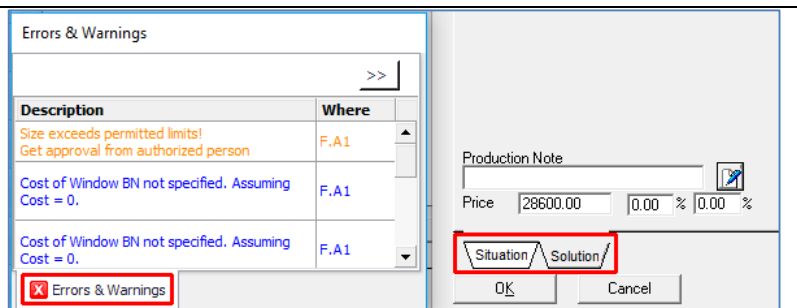
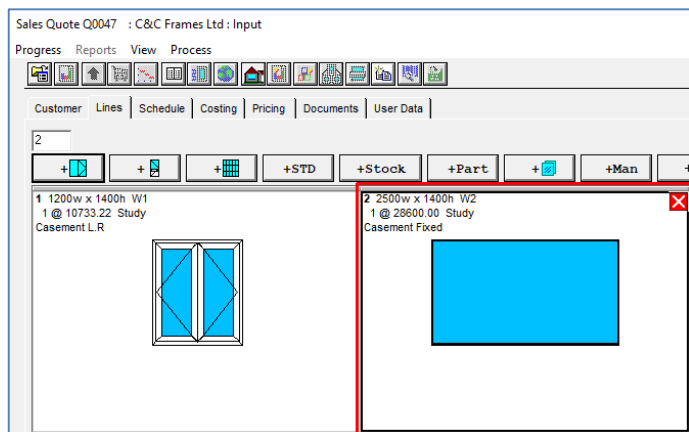
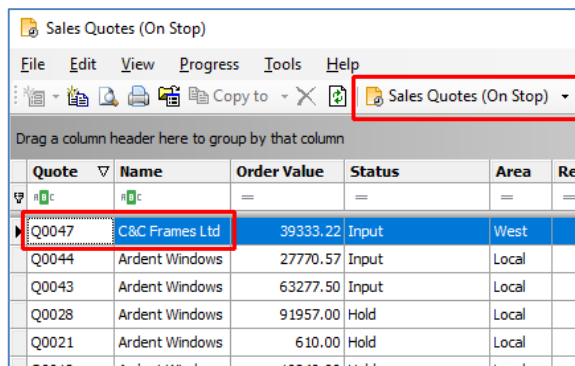
#### Users who do not have this right

Such warnings are treated as errors when configuring Sales Line. If the sales line doesn't have normal errors, it can still be saved. However,

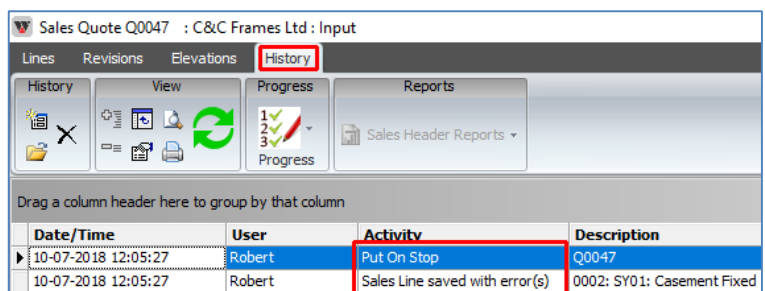
- ▲ It will be marked as erroneous
- ▲ The Sales Quote/Order will be flagged as 'On Stop'
- ▲ History will be logged

Please Note: The 'On Stop' flag on the Sales quote/order will prevent it from:

- ▲ Being included in any report
- ▲ Converting to a Sales Order
- ▲ Progressing to production

Quote	Name	Order Value	Status	Area	Rev
Q0047	C&C Frames Ltd	39333.22	Input	West	
Q0044	Ardent Windows	27770.57	Input	Local	
Q0043	Ardent Windows	63277.50	Input	Local	
Q0028	Ardent Windows	91957.00	Hold	Local	
Q0021	Ardent Windows	610.00	Hold	Local	



Date/Time	User	Activity	Description
10-07-2018 12:05:27	Robert	Put On Stop	Q0047
10-07-2018 12:05:27	Robert	Sales Line saved with error(s)	0002: SY01: Casement Fixed

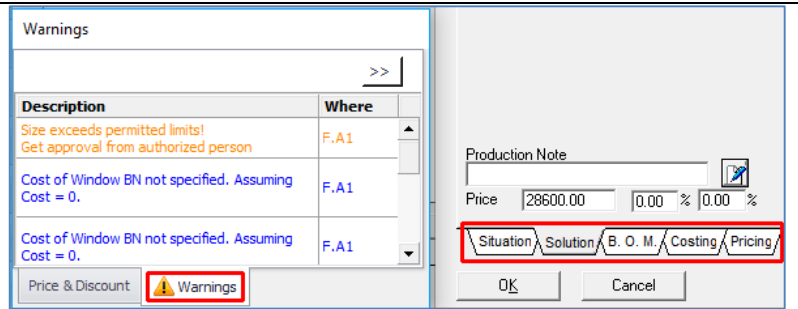
### Users who have this right

They can EITHER:

- ▲ Approve Sales Lines by overriding severe warnings OR
- ▲ Modify Sales Lines not to have such warnings

In either case:

- ▲ The Sales Lines will no longer be flagged as erroneous
- ▲ The Sales Header will no longer be On Stop
- ▲ History will be logged



Warnings

Description	Where
Size exceeds permitted limits! Get approval from authorized person	F,A1
Cost of Window BN not specified. Assuming Cost = 0.	F,A1
Cost of Window BN not specified. Assuming Cost = 0.	F,A1

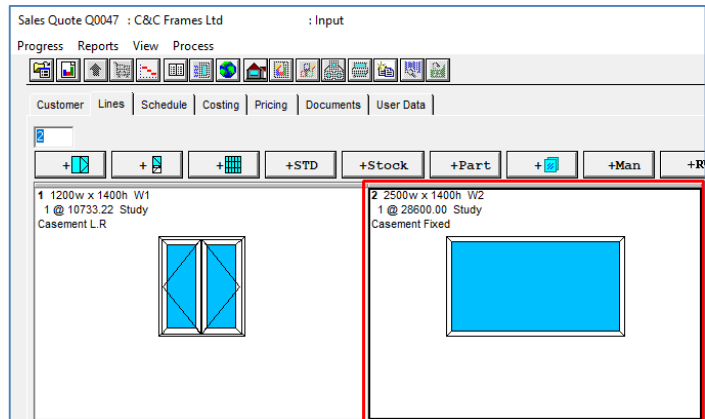
Price & Discount **Warnings**

Production Note

Price 28600.00 0.00 % 0.00 %

Situation Solution B. O. M. Costing Pricing

OK Cancel



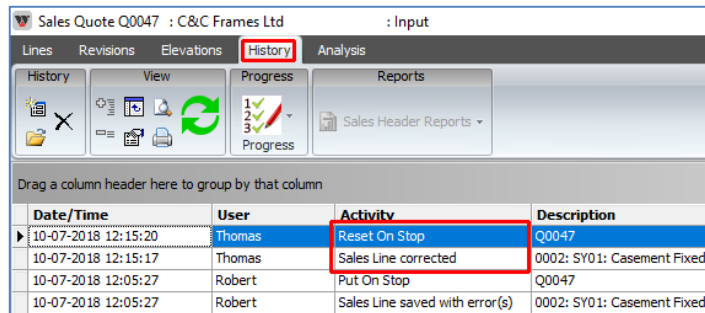
Sales Quote Q0047 : C&C Frames Ltd : Input

Progress Reports View Process

Customer Lines Schedule Costing Pricing Documents User Data

+ + + +STD +Stock +Part +Man +R

1 1200w x 1400h W1 1 @ 10733.22 Study Casement L,R	2 2500w x 1400h W2 1 @ 28600.00 Study Casement Fixed
--	--



Sales Quote Q0047 : C&C Frames Ltd : Input

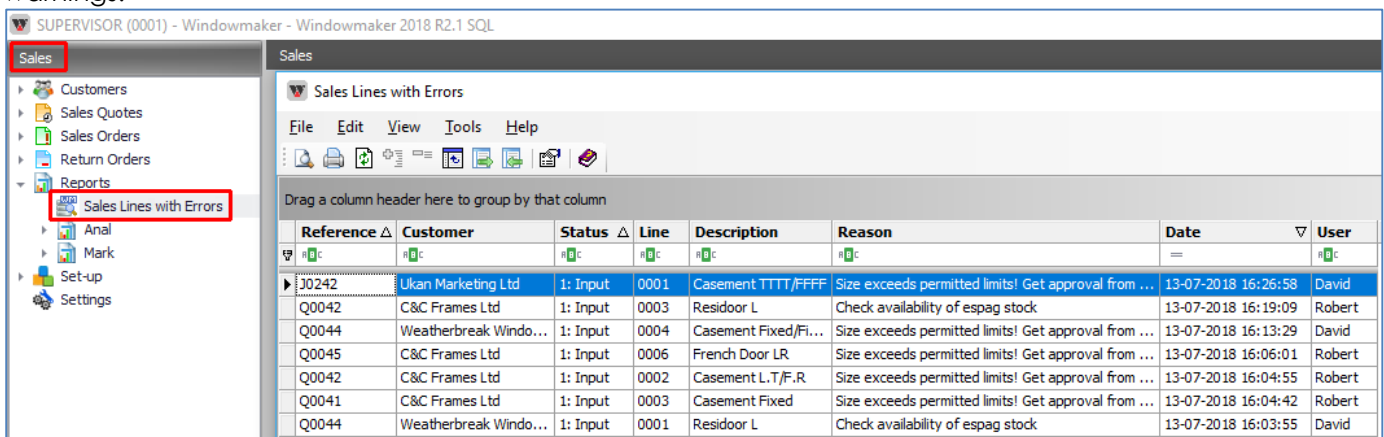
Lines Revisions Elevations **History** Analysis

History View Progress Reports

Drag a column header here to group by that column

Date/Time	User	Activity	Description
10-07-2018 12:15:20	Thomas	Reset On Stop	Q0047
10-07-2018 12:15:17	Thomas	Sales Line corrected	0002: SY01: Casement Fixed Q0047
10-07-2018 12:05:27	Robert	Put On Stop	Q0047
10-07-2018 12:05:27	Robert	Sales Line saved with error(s)	0002: SY01: Casement Fixed

A new 'Sales Lines with Errors' report is also available to monitor and analyse Sales Lines with severe warnings.



SUPERVISOR (0001) - Windowmaker - Windowmaker 2018 R2.1 SQL

Sales

Sales Lines with Errors

File Edit View Tools Help

Drag a column header here to group by that column

Reference	Customer	Status	Line	Description	Reason	Date	User
10242	Ukan Marketing Ltd	1: Input	0001	Casement TTTT/FFFF	Size exceeds permitted limits! Get approval from ...	13-07-2018 16:26:58	David
Q0042	C&C Frames Ltd	1: Input	0003	Residoor L	Check availability of espag stock	13-07-2018 16:19:09	Robert
Q0044	Weatherbreak Windo...	1: Input	0004	Casement Fixed/Fi...	Size exceeds permitted limits! Get approval from ...	13-07-2018 16:13:29	David
Q0045	C&C Frames Ltd	1: Input	0006	French Door LR	Size exceeds permitted limits! Get approval from ...	13-07-2018 16:06:01	Robert
Q0042	C&C Frames Ltd	1: Input	0002	Casement L,T/F,R	Size exceeds permitted limits! Get approval from ...	13-07-2018 16:04:55	Robert
Q0041	C&C Frames Ltd	1: Input	0003	Casement Fixed	Size exceeds permitted limits! Get approval from ...	13-07-2018 16:04:42	Robert
Q0044	Weatherbreak Windo...	1: Input	0001	Residoor L	Check availability of espag stock	13-07-2018 16:03:55	David

This facility could be useful in situations where you want the sales people to get approval from authorised persons before selling e.g.:

- ▲ To add handling charges or check technical feasibility for oversized designs
- ▲ To ensure sufficient stock balance for systems being phased out