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Upgrading from older versions

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)	www.windowmaker.com/EN/PDF/Wi	www.windowmaker.com/EN/PDF/Wi
	ndowmaker%202018%20(v7.x)%20Wh	ndowmaker%202018%20(v7.x)%20Rel
	<u>at's%20New.pdf</u>	<u>ease%20Notes.pdf</u>
Windowmaker 2012 (v6.x)	www.windowmaker.com/EN/PDF/Wi	www.windowmaker.com/EN/PDF/Wi
	ndowmaker%202012%20(v6.x)%20Wh	ndowmaker%202012%20(v6.x)%20Rel
	at's%20New.pdf	ease%20Notes.pdf

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Windowmaker 2020 (Release 8.0)

What's New

This section lists important features/updates introduced in this release.

New Products

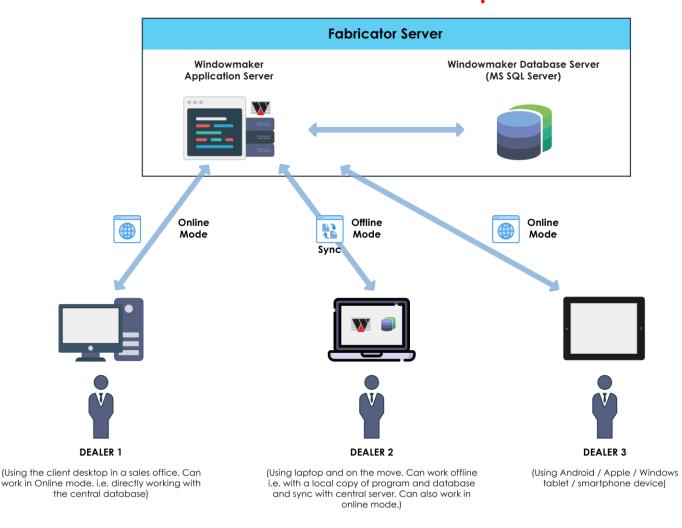
Windowmaker Dealer Client

A complete package for manufacturers and their dealers.

If you are a manufacturer who (also) sell through dealers, then Windowmaker Dealer Client is an essential tool for you.

Windowmaker Dealer Client equips your dealers with a state-of-the-art solution to estimate and send professional quotations to customers, by direct access to the Windowmaker software at the manufacturer's end. With all the rich and advanced features of Windowmaker it makes the dealer more productive, efficient and happy, effectively resulting in increased sales.

Windowmaker Dealer Client Implementation



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Explicitly designed to bridge the gap between the manufacturer and the dealers, the solution offers multiple benefits to both.

Benefits for Manufacturers

- A unified solution (common program and database) between fabricator and dealers means easy or almost zero maintenance to the fabricator and/or dealer.
- No manual filling of order forms and re-entering order details in the fabricator system. This avoids any
 possibility of expensive manual errors.
- No time lag for transfer of order information from the dealer.
- o Feasible to use 'cost-plus' pricing method for sales via dealers.
- Ability to plan production and stock better with visibility of sales in pipeline, including those of dealers.
- Ease of training the dealers with a unified solution. The training could be remote/online.
- Happy and motivated dealer network.
- New dealers can be up and running faster.
- No need for the fabricator to maintain and publish price lists. Say bye to paper-based price lists.

Benefits for Dealers

- o Dealers are equipped with state-of-the-art software that looks professional and can generate professional quotations, quickly and easily.
- No time lag for transfer of information from the manufacturer resulting in quicker turnaround times for quotation and delivery to the customer.
- Up-to-date data latest costing/pricing, latest technical updates from the manufacturer.
- o Freedom from manual and messy paperwork.
- o Track order status at the manufacturer end.
- Use the program on the move in offline mode, on your laptop/Tablets. Synchronize data with manufacturer's system once online.
- o Dealers become more productive as they save a lot of time by reduced paperwork.
- Eliminates costly errors (e.g. selling only what fabricator can manufacture/supply, avoiding taking orders for designs technically not feasible).

General Enhancements

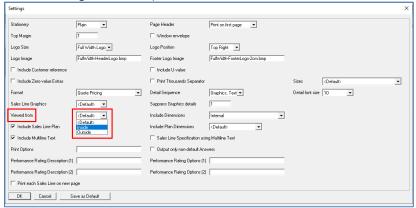
SQL Server 2019 for Windowmaker

Windowmaker is now supported to work with SQL Server 2019.

Reports - Customer Documents

Customer documents can now print sales line graphics with a selected 'Viewed from' side. The new setting is available on the following reports:

- Quotation
- Order Acknowledgement
- Invoice
- Survey Sheet
- Design Summary

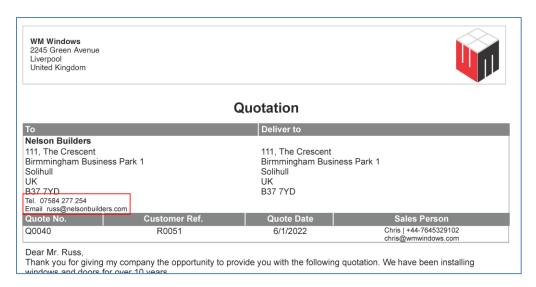


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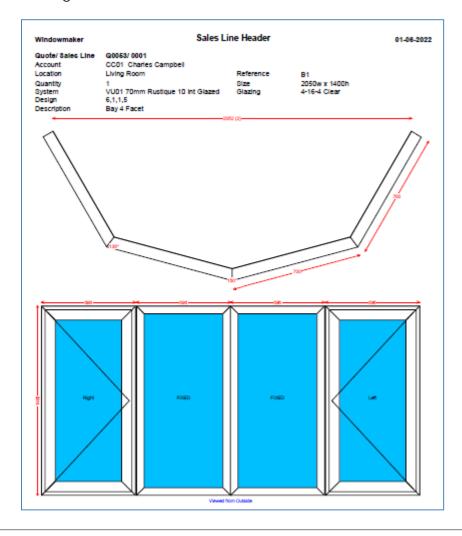
The following documents now include the customer phone number and email:

- Quotation
- Order Acknowledgement
- Invoice
- Specification Summary



Report - Sales Line Header

The report now allows to 'Include Sales Line Plan'. This is helpful during manufacturing, as it clearly indicates the angles and other dimensions.



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New Report - Requirements Summary (Export to Excel)

This report outputs the summary in Excel format, allowing for any additional analysis and calculations to be made.

4	Α	В	С	D	Е	F	G	Н
1	Windowmaker	Require	Requirements Summary			0	1-06-2022	
2	Order J0058	ML01	Mr. Mar	k Lydford				
3	Description	Stock No.	Qty	Size	Unit	Rate	Cost	Weight
4	Gaskets							
5	Mech joint Gasket	106411	4	21,648.0000	mm	2.10	45.92	0.000
6	L&S Corner Seal	WM_LSCORNERSEAL	1	14,860.0000	mm	2.10	31.52	0.000
7	L&S Interlock Seal	WM_LSINTSEAL	1	3,850.0000	mm	2.10	8.17	0.000
8	L&S Brush Seal	WM_LSSEAL	1	3,850.0000	mm	1.90	7.39	0.000
9	Generic Hardware							
10	BogieCarton 150	WM_BogCarton150	2	-	pcs	4.48	8.96	0.000
11	BogiePacker 16mmTh	WM_BogiePacker16	2	-	pcs	5.35	10.70	0.000
12	Butt Hinge(2D)	WM_BUTTHNGWH	4	-	pcs	6.20	24.80	0.000
13	Casement Wedge	WM_CasementWedge	4	-	pcs	5.16	20.64	0.000
	C1	MAA CaalaaaaaAAAadaa				F 2F	04.40	0.000

New Report - Orders Status Summary

This report outputs all Orders which are at status 'Ordered' or above but less than 'Complete'. Based on status, the orders are categorised as:

- 1. Ordered: Less than 'In Production'
- 2. Production: 'In Production' or higher, but less than 'Delivered'
- 3. Delivery: 'Delivered' or higher, but less than 'Complete'

This is quite useful as a daily management report to get a quick overview of orders at various stages.

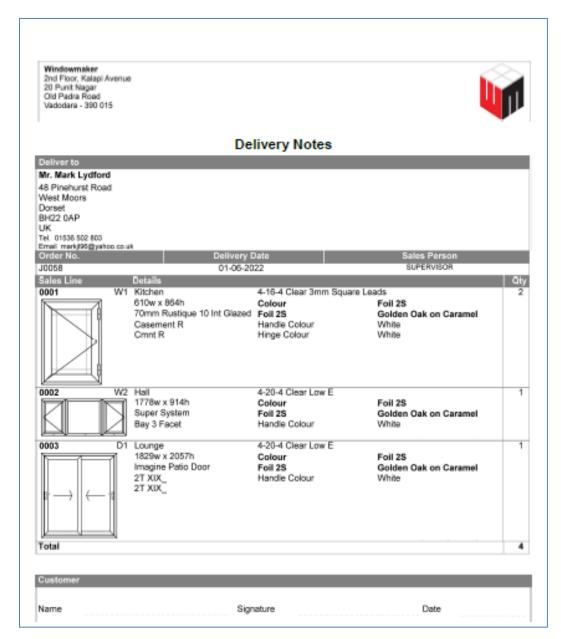
Nindown	maker				Order	s Status Summa	ary					01-09-	2022
	Ordered					Production					Delivery		
Order No.	Date Customer	Qty F	rames	Order No.	Date	Customer	Qty Fr	ames	Order No.	Date	Customer	Qty F	rame
10038	16-08-2022 Ardent Windows	70	70	J0051	25-06-2022	Prime Windows	12	12	J0039	24-05-2022	Ardent Windows	12	1
10044	11-08-2022 Ardent Windows	25	25	J0052	16-06-2022	Ardent Windows	12	12	J0053	15-05-2022	Ardent Windows	5	
10047	10-08-2022 Nelson Builders	4	4	J0042	13-06-2022	John Smith	5	5	J0054	07-05-2022	Mr. Mark Lydford	9	
0049	07-08-2022 Mr. Robert Redington	14	14	J0043	10-06-2022	Afton Green Ltd	4	4	J0046	01-05-2022	Nelson Builders	4	
0058	05-08-2022 Mr. Mark Lydford	4	6	J0048	13-05-2022	Afton Green Ltd	1	1	J0061	29-04-2022	Charlotte Fisher	9	
0059	01-08-2022 Jude Clements	16	22	J0056	10-05-2022	Internal Customer	57	71	J0064	25-04-2022	Emma Phillips	30	3
10060	27-07-2022 Maddison Baxter	18	24	J0019	09-05-2022	A B Company Ltd	3	3	J0066	18-04-2022	David Murray	21	2
0062	24-07-2022 Emma Phillips	15	15	RM000001		ABS Windows	2	2	J0040	11-04-2022	Ardent Windows	16	1
10063	22-07-2022 Maddison Baxter	15	17	RM000002		ABS Windows	1	1					
10065	18-07-2022 Charlotte Fisher	28	38	RM000003		ABS Windows	1	1					
10067	10-07-2022 Joshua McLean	21	21										
10068	08-07-2022 Zoe Fox	14	14										
10069	03-07-2022 Katherine Benson	15	15										
10070	01-07-2022 Anthony Fletcher	17	19										
10071	29-06-2022 Charles Campbell	22	28										
PJ150001	23-06-2022 Nelson Builders	4	4										
PJ1701	22-06-2022 Afton Green Ltd	12	12										
PJ1702	20-06-2022 Afton Green Ltd	9	9										
J180001	12-06-2022 Nelson Builders	18	18										
J180002	10-06-2022 Nelson Builders	18	18										
20047	01-06-2022 Afton Green Ltd	4	4										

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New Report - Delivery Notes

The document can be generated for individual Orders or Deliveries. Delivery Extras, if any, are collated and output at the end of each Order.



New Report - Installation Material

This report prints the summary of material required for installation.

Windowmaker	lı lı	nstalla	tion Material			01-06-202
Order J0053	R	RT0048 Mr. Mark Lydford				
Description	Stock No.	Qty	Size	Unit	Cost	Weight (kg
Inst. Material						
Foam/Backer Rod	WM_BackerRod	40	59580	mm	29.82	0.000
Drainage	WM_Cap-WH	26		pcs	0.00	0.000
Fastner Cap	WM_FastnerCap	160		pcs	32.00	0.000
Install. Screw 8*100	WM_FScrew8x100	160		pcs	16.00	0.000
Mask Tape	WM_MaskTape	40	59580	mm	29.82	0.000
PU Foam	WM_PUFoam	40	59580	mm	119.22	0.000
Silicon Sealant	WM Silicon	40	119160	mm	333.68	0.00

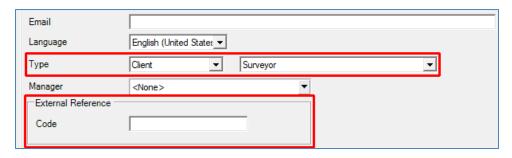
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Users

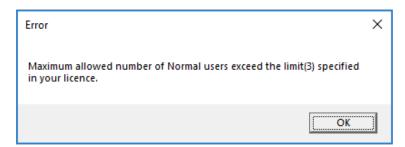
The program now allows an External Reference Code to be added to all Users of type Client – Order Entry, Surveyor & Installer. This was already available for Sales Rep. Clients.

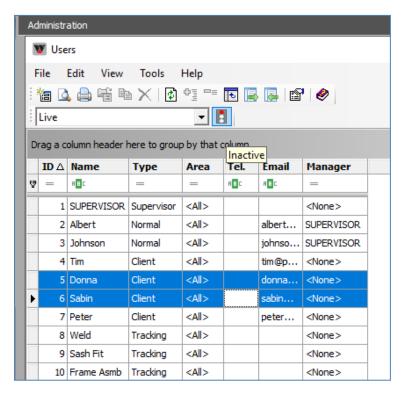
When linking to external software (e.g. accounting, ERP) this can be used to map with the corresponding entities.



Named Users

Windowmaker now allows 'Named User' licenses. Unlike concurrent licenses, only the designated users can log into Windowmaker. The number of 'named' Users cannot exceed the Named User Licenses purchased. Named Users are cost effective if you want to give dedicated rather than a shared access.





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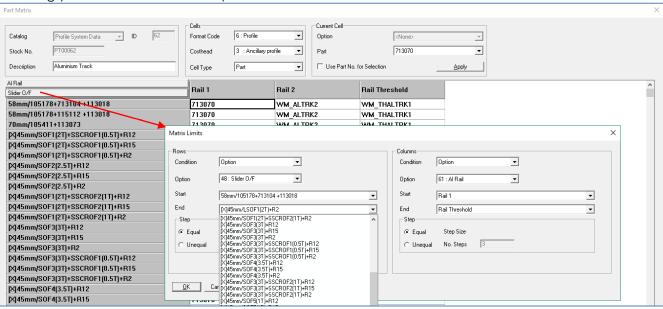


Part Matrices

Part Matrices have been enhanced to show:

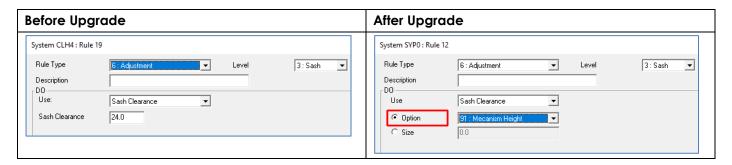
- Long Description of Option Answers for indices instead of Short Description or Product No.
- Product No. without truncating, by increasing cell widths
- Long Description in Start and End fields in Matrix Limits dialog
- Long Description in exported CSV files instead of Short Description

These make data set-up easier as it helps in identifying option answers and product numbers better, thereby enabling you to select the correct parts faster.



Rules - Adjustments

For Adjustment type rules, the program now allows to set values using Size type Options. This increases the ease of setting up rules and lesser number of rules will be required.

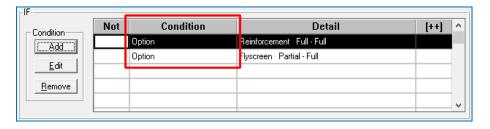


Rules - Conditions

The program now allows you to set up rules with:

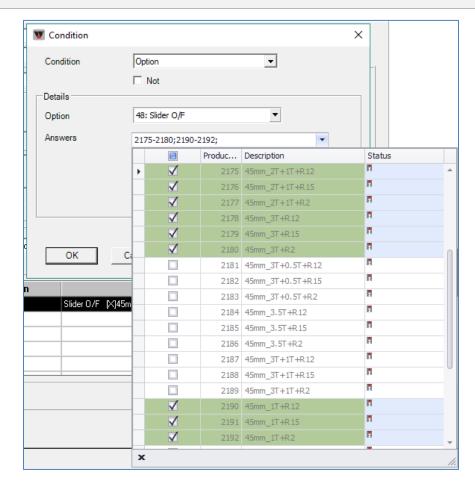
- More than one condition of the same type
- Multiple discontinuous answers within the same condition

These enhance the ease of Rules set-up and considerably reduce the number of rules.

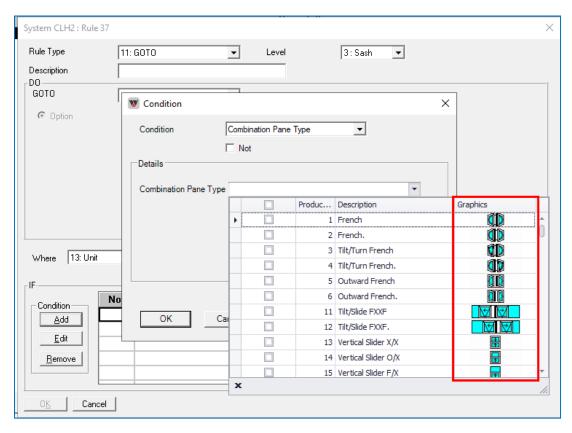


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The graphics for pane types and combination pane types are displayed on the Conditions page making rules set-up easier.

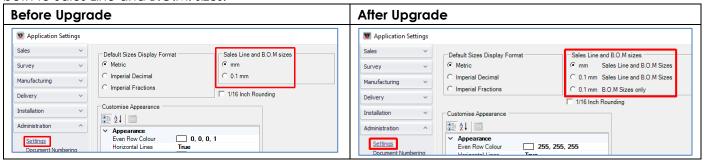


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Application Settings – B.O.M. Sizes

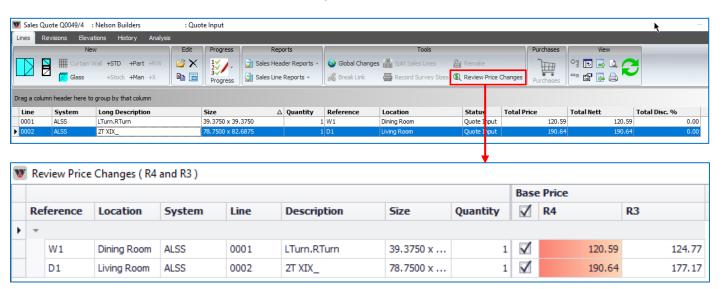
Windowmaker now allows setting 0.1 mm accuracy only for B.O.M. Sizes. Earlier, selecting 0.1 mm applied both to Sales Line and B.O.M. sizes.



Enhancement to Options:

Revisions

Windowmaker now allows to 'Review Price Changes' for Sales Quotes. This is already allowed for Sales Orders.



Reusable Offcuts

The offcut label is now redesigned to facilitate easy identification of the offcuts.

Before Upgrade	After Upgrade
Offcut 6/1/2022	Offcut J0061 6/1/2022
Part : 84mm Outer Frame Stock No.: 701203W# Size : 818	701203W# 84mm Outer Frame 818

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Entrance Doors

A new Purchase Order report is now available. This includes information on Door Slab & Sidelights including any prepping instructions.



Novatech



Purchase Order

Deliver to

LIVERPOOL UK - L3 8FH	,						
P.O. No.		Ord	ler Ref.	Order Date		ue Date	
PO00221		J	0049	01-Jun-22	1	0-Jun-22	
Order/ Line	Position Ref.	Location	Specification			Qty	Amount
J0049/ 0001	1/S.A1	•	90-063-015-001/ N1200	- SMOOTH ORLEANS FG 3'0"X6'8	3"	1	132.80
			Door Handle Type Door Backset Door Cylinder Hinge/Lock Positions Lock Block Height 10-310-057-001 WM_BKST1 20 Fire Rating	Levr/Lever 2 3/8 Standard Slab supplier standard 1016 STAIN GL MISTRAL 22x48 LOW 2 3/8 Backset Espag 20 min Fire Rating	/E ARGON	1 1 1	618.00 5.00 6.00
J0049/ 0001	2/G.A1		90-072-169-001/ N1200	- SMOOTH ORL/RM FG 1'0"X6'8"		1	97.60
			10-310-017-001	STAIN GL MISTRAL 8x48 LOWE	EARGON	1	402.00
			20 Fire Rating	20 min Fire Rating		1	6.00
				Total			1,267.40
				Discount	20.00%		253.48
				Grand Total			1,013.92

Tracking

The program now generates unique barcodes for profiles calculated using rules with "Don't affect Adjustments" set. Link to Saws/Machining Centres that use Windowmaker barcode can handle operations for these profiles.

Stock Control

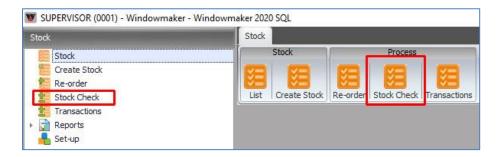
Windowmaker has made periodic stock reconciliation much easier.

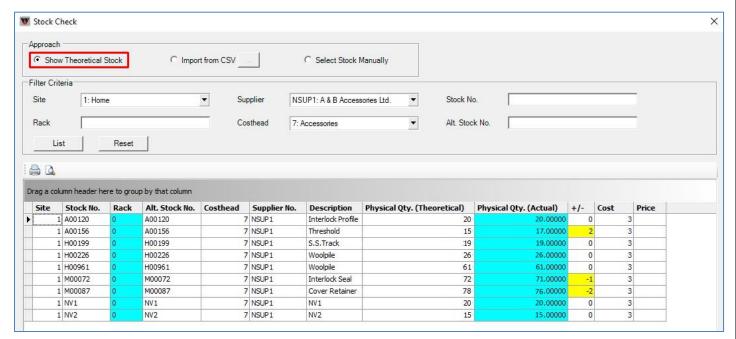
- a. Show Theoretical Stock: This lists the stocks in the same sequence as the Theoretical Stock report. This makes it easy to enter the actual quantities noted down on the printed Theoretical Stock report.
- b. Import from CSV: When changes are done in an external Stock Control system, updated details can be exported to a CSV file and imported into Windowmaker. This is useful when stock is maintained in an external system.
- c. Select Stock Manually: This is useful when only a few records need to be updated, maybe outside the routine physical stock check.

Relevant Adjustment transactions are automatically posted by the program.

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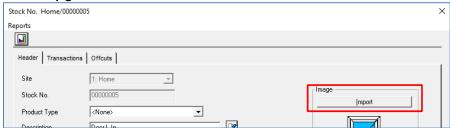




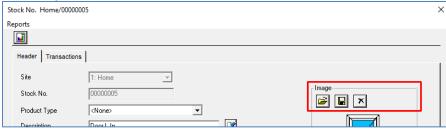


The program now also allows to save or delete images associated with Stock records.

Before Upgrade



After Upgrade

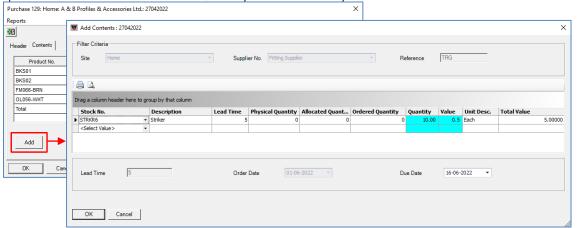


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Stock Control & Purchase Ordering

The program now allows to add contents to Purchase Orders at Planned status. It already allowed to remove existing contents by changing the quantity to zero. This is especially useful in cases where you find that some specific items are not available, and you want to buy alternate items instead.

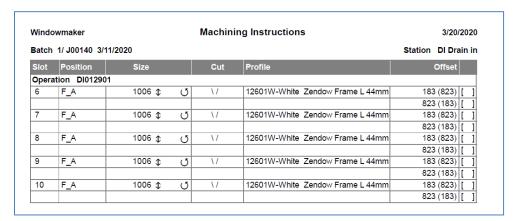


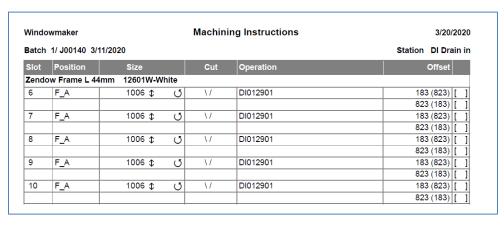
New Options

Machining Instructions

This new Option allows generating necessary machining instructions as a report. For each operation station specified, a separate report is generated. Sequence can be Operation or Profile. It outputs the offset position from start as well as end, for operations on individual pieces. Any flipping (horizontal and/or vertical) required are also indicated.

Note: This requires machining operations to be set-up in the data.





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Breaking Changes

This section lists 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.

General

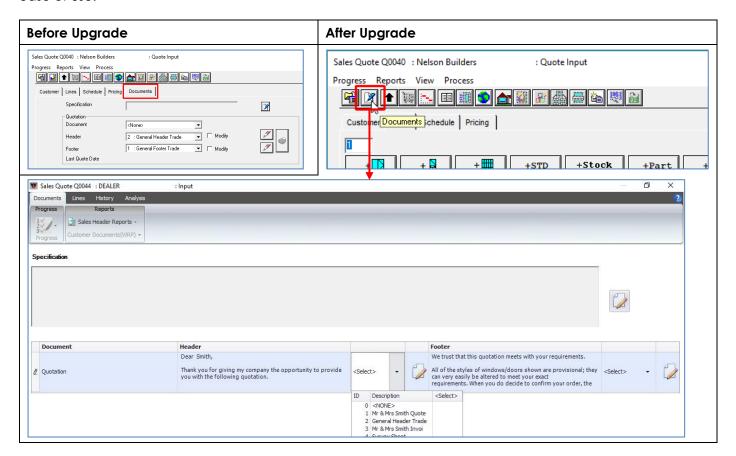
Upgrading to Windowmaker 2020

It is mandatory that Modules are migrated to database, in order to upgrade to Windowmaker 2020. If you are on version Windowmaker 2012 R6.3 or lower, and modules are not migrated to database, then you first need to upgrade to Windowmaker 2018 R3.12 before upgrading to Windowmaker 2020. If you are on Windowmaker 2012 R6.4 or higher, then your Modules are already in database. Therefore, it can be directly upgraded to Windowmaker 2020.



Sales Header Notebook

The Documents page (previously available as a page on the Sales Header Notebook) now needs to be accessed using the toolbar button on the Sales Header Notebook. The interface has also been upgraded for ease of use.



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Active/Inactive Products

Matrices now allow 'Inactive' products as indices. Earlier, indices in Matrices (Part/Cost/Price) with Part Filter type option answers were getting blank if such products were subsequently set as 'Inactive'. When index is modified in such matrices, it used to get compact resulting in incorrect mapping.

Database Schema Changes

Changes to Primary Keys:

Name	Primary Key	Change
pk_WMGlobalData_ID	WMGlobaldata.ID	Added

New database tables:

Name	Remarks
WMApplicationSetting2	To store Dealer specific information including Installation
	Cost, Installation Price, Survey & Installation related
	information,
	Note: For Survey/Installation Capacity, only 'Input per Order'
	approach is available.

Changes specific to database tables:

Table	Column	Change	
WMGlobalData	ID	Added	
WMCustomerTransaction	RowGUID	Added	
WMSalesAnalysis	RowGUID	Added	
WMUser	Status	Added	
WMSalesHeaderTable	Markup	Added	
	DropNo	Added	
	PriceFlag	Added	
	VerificationFlag	Added	
	ScheduleFlag	Added	
	FlagsForInternalUse	Added	
	ResponsibleID	Added	
	TenantID	Added	
	Flag	Removed	
WMCustomer	ResponsibleID	Added	
	TenantID	Added	

Changes specific to database views:

Name	Remarks
WMSalesHeader	Markup column has been added.
	DropNo column has been added.
	PriceFlag column has been added.
	VerificationFlag column has been added.
	ScheduleFlag column has been added.
	FlagsForInternalUse column has been added.
	ResponsibleID column has been added.
	TenantID column has been added.
	Flag column has been removed and split into the above Flag
	columns.

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New Stored procedures:

Name	Remarks
wm_sp_AddFabricatorQuote	Add fabricator ('J') record in WMSalesHeader Table from dealer record
	Tecord
wm_sp_UpdateFabricatorSalesheader	Update Fabricator salesheader record from dealer record
WM_SP_UpdateDealerSalesheader	Update Dealer Salesheader
wm_sp_UpdateDealerSalesline	Update Dealer Salesline from fabricator sales lines.

New Trigger:

Name	Remarks
wm_tg_Update_WMSalesHeaderTable	For internal use

Changes to Options

Revisions

You can no longer select sales lines while creating a Revision for an Order. All the sales lines from the previous revision will be selected automatically.

Issues Fixed

Windowmaker 2020 SP1

Order Entry | Sales Client - 2079256

Reports were not available for Sales Rep. and Order Entry type Client users. This is now fixed.

Order Entry | Sales Line Pricing | Discounts- 2078937

The problem with Extras discounts not getting applied correctly from Customer Special terms setup for them, when the decimal separator in regional settings is other than '.' (dot), is now resolved.

Order Entry | Sales Lines | Reports - 2078973

For Bay designs with cill, cutting sizes for cill parts are now correctly displayed according to the 'Length Datum' setting in the Preferences or Saw, and the end cuts are also shown correctly on reports. These were earlier incorrect on some reports.

Order Entry | Flag Sales Line - 1868271

For the Sales lines having facets of unequal heights, it is now possible to change heights without resetting the designs of any of its facets, provided their heights relative to each other are still similar. Earlier the designs would get reset every time there was a minor change in sizes.

Windowmaker 2020

Order Entry | Sales Headers - 2077782

If a user created a new Quote/Order and moved to 'On Stop' status without saving first, then Quote/Order was lost, because 'Ok' was disabled and users were forced to click on 'Cancel'. This has now been corrected and the user can save such a Quote/Order. Subsequent edits are not allowed as the Quote/Order is 'On Stop'

Order Entry | Reports - 1977413

The problem of last report not printing from selected multiple Quotes on Sales Quotes Set-up is now fixed.

Order Entry | Shapes - 1977159

The incorrect Internal dimensions in designs with couplers in Shaped part of a Sales line has now been corrected.

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Order Entry | Link to CAD - 1977267

AutoCAD was unable to open .DXF files exported from Windowmaker, if the Sales line contained Make-To-Order type Glazing.

Order Entry | Special Terms - 1977293

The problem with the Special Terms form crashing sometimes on opening is now resolved.

Order Entry | Sales Lines | Entrance Doors – 1976920

While creating a Sales Line using the Entrance door system, Glass insert costs were visible to users who did not have access rights to view costs. This is now fixed.

Order Entry | Sales Lines | Entrance Doors – 1974948

Creating an Entrance door with side lights having a top arc, displayed the Sales Line with rectangular shape without being clipped to the shape. This is now corrected, and the appropriate door shape is visible.

Production Batch | Production document - 2078185

The problem with illegible fonts for dimensions when "Small" Sales Line graphics option was selected on the Production Document is now resolved.

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Setup | Cost Matrix - 1976317

If cost matrix was imported from a spreadsheet, any blank cells were converted to 0 after importing instead of blank value. This is now corrected.

Setup | Rules - 1976790

While upgrading data from older versions where modules are not migrated, GOSUB comments were truncated to 12 characters. This is now fixed.

Setup | Entrance Doors - 1976788

Problem with specifying trimmable values as 1" on Door Styles, once the value was increased and then decreased, is now fixed.