

## Training Manual

## Windowmaker™ Training Manual

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## How to set-up Customers?

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### Types of Customer Accounts

#### 1. Normal account

A Normal account is used to set-up details for a regular customer. The details can be used for a job by selecting the account on the Job - Customer page. The same address will be used for Invoice and Delivery address, if an address is entered only on the Customer – Header page. If separate addresses are required, a delivery address needs to be entered on the Customer - Delivery page.

#### 2. Sundry account

A Sundry account is used for a customer who is not a regular customer and for whom an account has not been set-up. In this situation you can select a sundry account and enter the customer's name and address to use only for that job. Sundry account numbers must begin with 'XX'.

### Creating a Customer Account

For creating a new account for a customer 'ABC Windows':

- Go to Set-up | Customers.
- Click on File | New. The Header page will be displayed.

*The customer record number can be up to 8 alphanumeric characters.*

Creating a customer account will require setting up the following pages:

#### Header

- The Header page allows you to define the basic customer information i.e., Name, Address, Email, Password, etc. The information entered here will be used as defaults for the corresponding fields in jobs created for this Customer.
- Additionally, you can enter an 'Alert' text. The text will be displayed from the Job - Customer page. It can be used as e.g., a reminder to be given to the order entry person, whenever a job is created for the customer.

*The 'Alert' text facility will be available only if customer records are stored in the database.*

#### Delivery

- This page allows you to enter delivery details for the customer e.g., Delivery Address, Route, etc.
- The information entered here will be used during Delivery Scheduling and for generating Delivery Notes.
- You can specify the delivery route, via which you wish to despatch jobs to the Customer.
- '←To be collected→' indicates that the delivery will be picked up by the Customer.

#### Job Codes

- This page allows you to define pricing related information e.g., Job Type, Currency, Tax, Payment, etc. This also allows you to designate the user responsible for a customer. The job codes specified here will be used as defaults in the job created for this customer.
- Rep./Area: Select the region to which the customer belongs. Users allocated this Rep./Area can create or edit jobs/quotes for this customer.
- Responsible: A customer belongs to a particular Rep./Area. Any one of the users with rights to this Rep./Area can be specified as 'Responsible' for this customer.

*This facility will be available if customer records are stored in the database*

- Source: Specify the origin of the account e.g., from press advertising or trade references.
- Payment: Select a means of payment for jobs created for this customer e.g., invoice to be paid on account within 30 days or immediately on delivery by cash or cheque. Payment terms can also be set-up to specify the Settlement Discount rate to be applied to the job price if payment is made within a certain number of days.
- Tax (A) No.: Specify the tax rate to be applied as first level tax.
- Job Type: Specify the type of job e.g., trade, retail. This will determine how pricing will be calculated for the job.
- Currency: Specify the currency for payment.

## Special Terms

- This page allows you to set-up the discount to be applied to the job 'Total Goods' value on the Pricing page. This is displayed as 'Discount 1 %' on the Job - Pricing page.
- Displays System and Extras discounts to be applied for the customer, as set-up in Customer Special Terms

## Defaults


- This page allows you to set-up default details for
  - Glazing, Options and their answers to be used for the customer.
  - Customer documents to be printed for the customer.
  - The defaults will override System set-up.

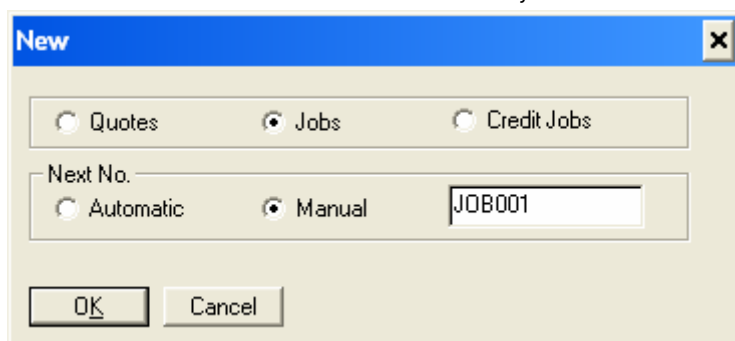
## Accounting

- This page helps in managing customer credit. You can enter the credit limit to be allowed for this customer.
- 'On Stop' can be selected to indicate that no further transactions are to be done for the customer account.

## How to create Quotes/Jobs/Credit Jobs

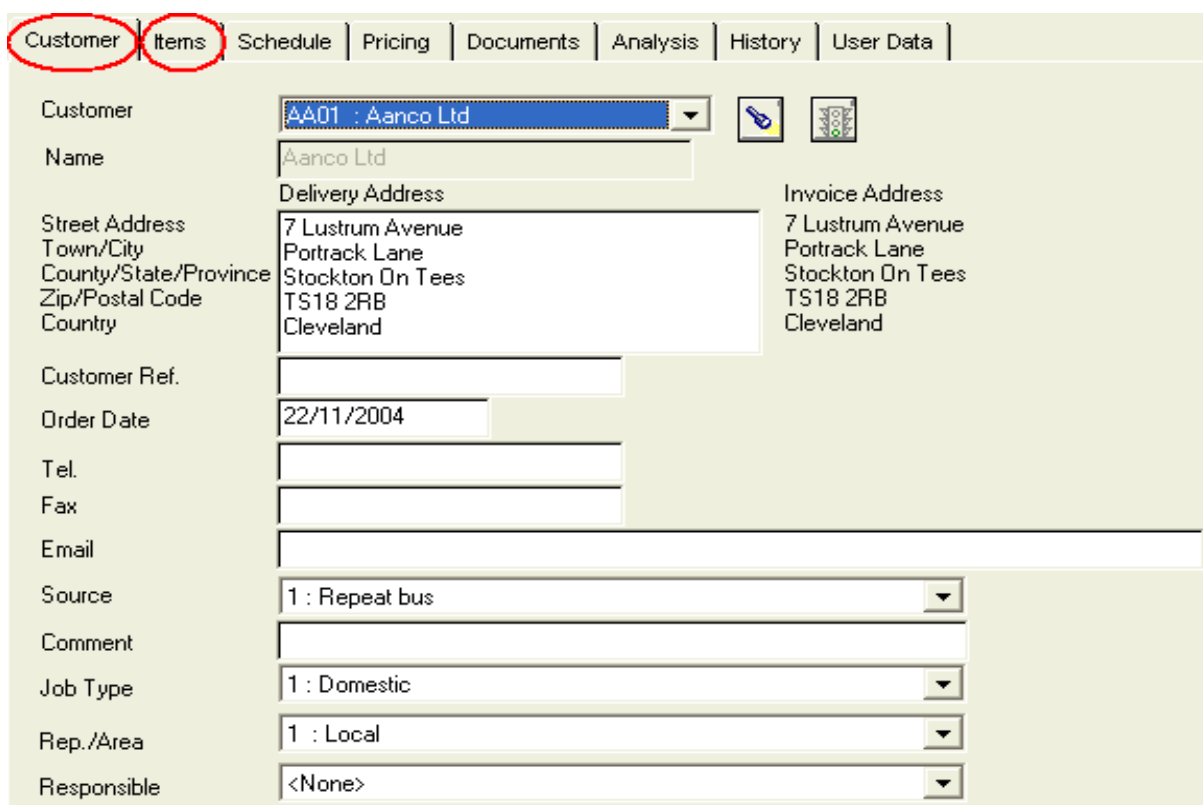
### To create new Job:

- Go to File | New or click on the  button.
- The 'New' dialog is invoked.
- Choose 'Jobs' to add a new Job.
- Choose 'Manual' to enter a Job number of your choice. Enter the next Job number.



The 'New' dialog box has a title bar with a close button. It contains three radio buttons: 'Quotes', 'Jobs' (selected), and 'Credit Jobs'. Below these is a section for 'Next No.' with two radio buttons: 'Automatic' and 'Manual' (selected). To the right of the 'Manual' radio button is a text field containing 'JOB001'. At the bottom are 'OK' and 'Cancel' buttons.

- Alternatively, you can choose 'Automatic' to let the program assign the next Quote/Job/Credit Job number.
- Click on 'OK'.
- The Job notebook is invoked.
- Specify the details in the Customer page.

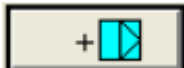


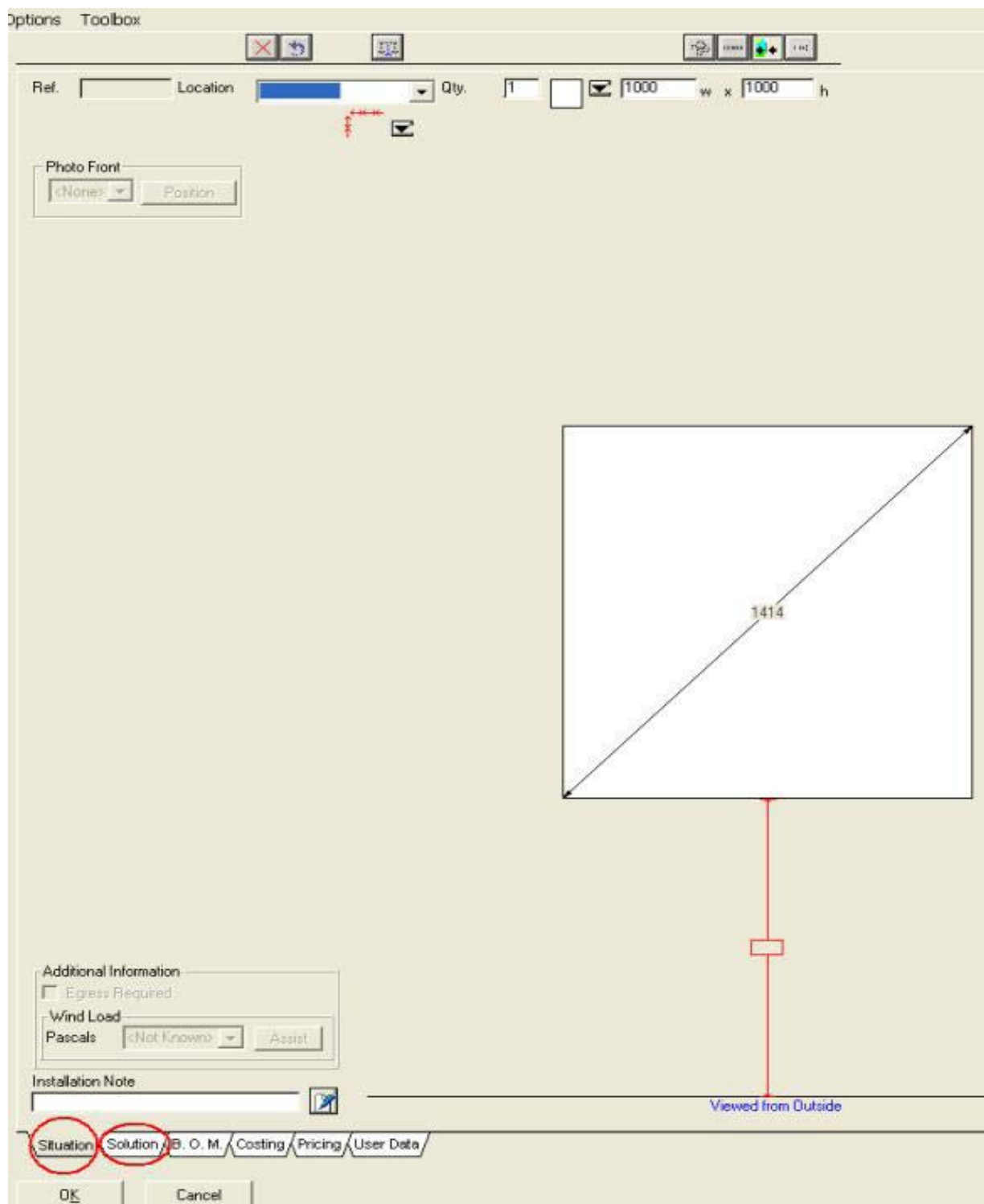
The 'Customer' page of the Job notebook is shown. The 'Customer' and 'Items' tabs are circled in red. The 'Customer' tab is active, showing a dropdown menu with 'AA01 : Aanco Ltd' selected. Below this are fields for 'Name', 'Delivery Address', and 'Invoice Address'. The 'Delivery Address' and 'Invoice Address' fields are both populated with '7 Lustrum Avenue', 'Portrack Lane', 'Stockton On Tees', 'TS18 2RB', and 'Cleveland'. Other fields include 'Customer Ref.', 'Order Date' (22/11/2004), 'Tel.', 'Fax', 'Email', 'Source' (1 : Repeat bus), 'Comment', 'Job Type' (1 : Domestic), 'Rep./Area' (1 : Local), and 'Responsible' (<None>).

- Go to the Items page and create the required items.
- Click on 'OK' to save the Job.
- Similarly, you can add new Quotes or Credit Jobs.

*Credit jobs can only be created in Windowmaker Express and higher.*

## How to add an item into Order

- Using the mouse click on the 'Add Design Item (Not Door)' icon 
- Every item has a Situation page that describes the opening that is to be filled, and a Solution page that specifies how the item will be manufactured.
- On 'Situation' page specify Location, Quantity, Height and Width. Then go to 'Solution' page.



The screenshot shows the 'Options' and 'Toolbox' tabs at the top. Below them are icons for adding, deleting, and moving items. The main area contains the following fields and controls:


- Ref.**: A text input field.
- Location**: A dropdown menu with a blue selection.
- Qty.**: A text input field with the value '1'.
- Dimensions**: Two text input fields for width and height, both set to '1000'.
- Photo Front**: A section with a '<None>' dropdown and a 'Position' button.
- Diagram**: A large square with a diagonal line and the number '1414' in the center.
- Additional Information**: A section with a checkbox for 'Egress Required', a 'Wind Load' section with 'Pascals' and '<Not Known>' dropdown, and an 'Assist' button.
- Installation Note**: A text input field with a small icon to its right.
- Navigation Tabs**: A row of tabs: 'Situation', 'Solution', 'B. O. M.', 'Costing', 'Pricing', and 'User Data'. The 'Situation' and 'Solution' tabs are circled in red.
- Buttons**: 'OK' and 'Cancel' buttons at the bottom.

At the bottom right, there is a red vertical line with a small square at the top, and the text 'Viewed from Outside' below it.

- On the 'Solution' page select an appropriate system for the type of window you want to create.




The screenshot shows the 'System' dropdown menu with the value '130 LifeStyle Slide Door' selected.


- Click on a small icon **Design**   besides the Design field and select a design from the available designs.
- The new design will be visible on the Solution page. Go to B.O.M. page to see parts used in the item, their quantity and size etc.
- Go to 'Costing' page to see the item costing.
- Go to 'Pricing' page to see item pricing.


Job: 130 : Item 7 : S>S>F

Options | Toolbox | Reports

Ref.  Location  Qty  Height  Width

System  

Design  

S>S>F 

6.38 CLEAR LAM.

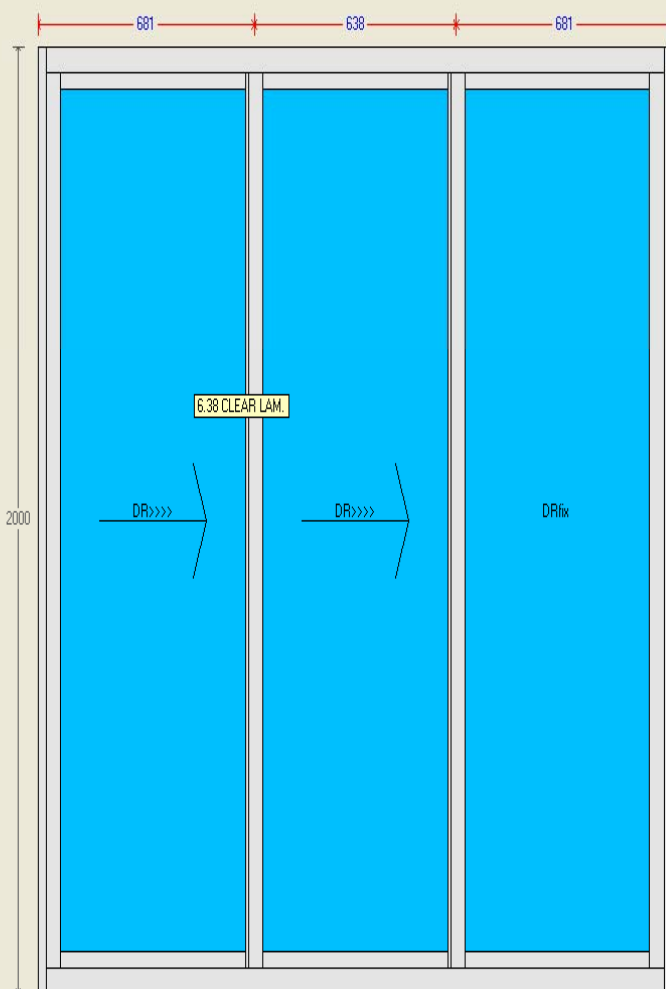
SYSTEM	130 STACKING-SG
FRAME SIZE	125mm
FINISH	MILL FINISH(00)
WINDLOAD	N1 700
WATER RATING	AUTO
DOOR TYPE	STACKING SG
ADAPTORS	<None>
S/DOOR SILL	LSS-377
LOCKSTILE DR	LSS-305
INTERLOCK DR	LSS-306/311
FLY DOOR	FLY DOOR
SECURITY GRIL	<None>
FLY DR MIDRAIL	<None>
SCREEN DR LA	<None>
FLY DR MESH	ALUMINIUM
SCREEN BUY-IN	<None>
S/DR LOCK LID	<None>
S/DR LOCK RES	<None>
S/DR LOCK CO	<None>
SEALS	WOOLPILE
MITCHELL HANI	<None>
ROLLERS	TWIN WHEEL SS
FIXINGS	<None>
TRIMS INTER	<None>
TRIMS EXTERN	<None>
SUB HEAD	<None>
SUB SILL	<None>
REVEALS	<None>
FLASHING	NONE
ARCHITRAVES	<None>
LABOUR	LIDCO
GLAZING	FACTORY
FACTORY GLAZ	0
INSTALLATION	NO

Production Note

Price  Discount %

Situation | Solution | **B.O.M.** | Costing | Pricing

OK | Cancel



Viewed from Outside


- Click on 'OK' button at the bottom to store the item.

## How to change an Option

Option answers can be changed either directly on the Solution page or collectively by using the 'Edit all Option Answers' icon.

To change an option directly on the Solution page,

- Select the existing answer you wish to change.

SYSTEM	130 STACKING-SG
FRAME SIZE	125mm
FINISH	MILL FINISH(00)
WINDLOAD	N1 700
WATER RATING	AUTO
DOOR TYPE	STACKING SG
ADAPTORS	 <None>
S/DOOR SILL	LSS-377
LOCKSTILE DR	LSS-305
INTERLOCK DR	LSS-305
FLY DOOR	LSS-319
SECURITY GRIL	LSS-332

- Select the new answer from the list.
- After a few moments **Windowmaker** will accept the highlighted answer as the new answer to the option.


## How to edit a design

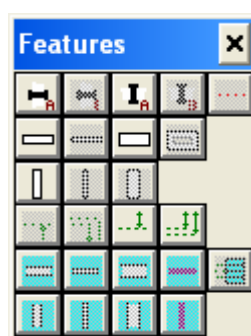
Any design can be easily edited in **Windowmaker** by adding or deleting transoms and mullions and by amending pane types.

Additionally a design may be split into several frames by adding couplers.

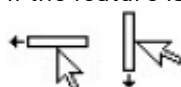
## Add Transoms, Mullions and Couplers

Transoms, mullions and couplers can be added to a design at any time.


- Open the 'Features' dialog by clicking  alternatively, select Toolbox | Design Features from the menu.



- Select the feature to be added from 'Features' dialog or from Options | Features
- Position the mouse on the item where you wish to add the feature and click.
  - If the mouse is over a sash, then the feature will be added as a sash transom or mullion.
  - If the feature is positioned very close to the edge of a sash, the icon will change




to indicate that the feature is going to be added at the frame level.

- If the feature is not allowed at a position then the feature icon changes to a 'No Entry' sign 
- Finish adding features by clicking the right mouse button.




## Change a Pane Type

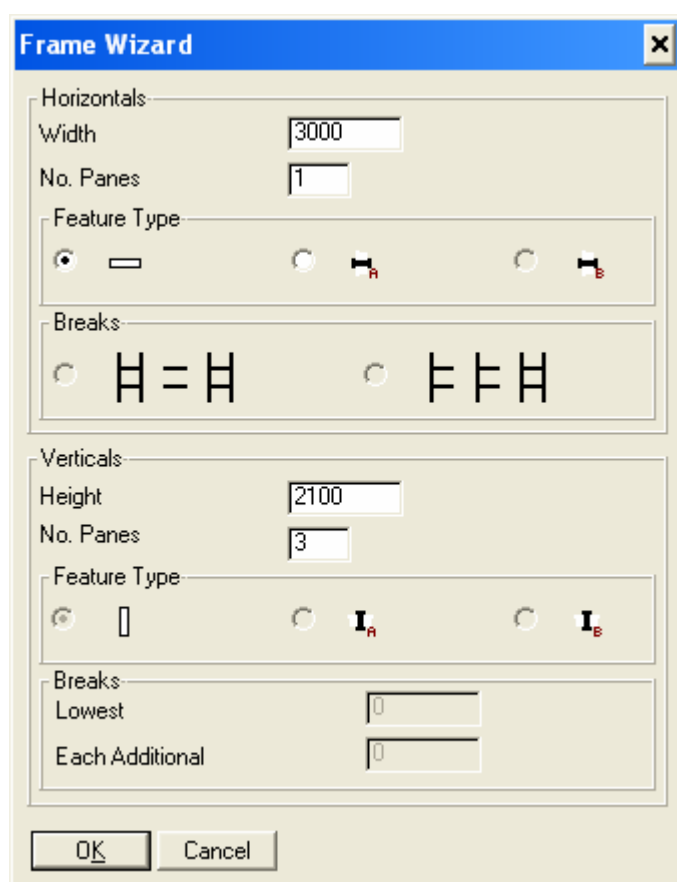
- Open the 'Pane Types & Glazing' dialog by clicking . Alternatively, select Toolbox | Pane Types from the menu.
- ☐ Select the pane you wish to change. Multiple panes can be selected by holding down the **Shift** key as you click on the panes you require.
- On the pane types dialog click on the pane type you wish to apply. Alternatively, click on the Combination pane types tab and select a combination to apply.



*A combination pane will apply the pane types and features required for that particular combination. For example, a French door combination pane type will apply the French door master, the French door slave and the French door mullion all in one action.*

## How to create a new frame

- Click on the 'New Frame' dialog . Alternatively, select Options | New Frame from the menu.
- Enter the number of widths and heights you require for your item.




- The frame will be created to the grid that you specified. The frame can now be edited as required.

## How to create a raked window

The shape of an item is specified on the Situation page.

- Add a new item and go to "Situation" page.

- Push the button to open the 'Shapes' dialog .

- Click on the relevant page to display the respective Shapes. Select the required shape.


## How to Dimension a Shape

Shape dimensions are also edited on the Item - Situation Page.

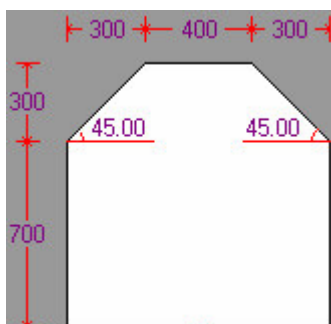
The dimensions available for editing will depend on the Shape selected. If any of the Shape dimensions are not editable they will be displayed in grey.

The following example shows how to dimension an 'Angled Shape 6' item with a height and width of '1000' each.

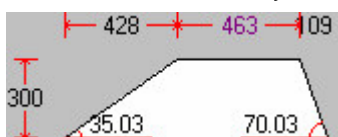
- Create an item and go to the Situation page.
- Open the Shapes dialog.

- Click on  to select 'Angled Shape 6'.

- Click on the 'Close' button. The Situation page displays:



- Edit the first and the last horizontal dimensions to say, '428' and '109' respectively.
- You can also achieve this by entering the left and the right angles as '35' and '70' respectively.



- Go to the Solution page and save the item.

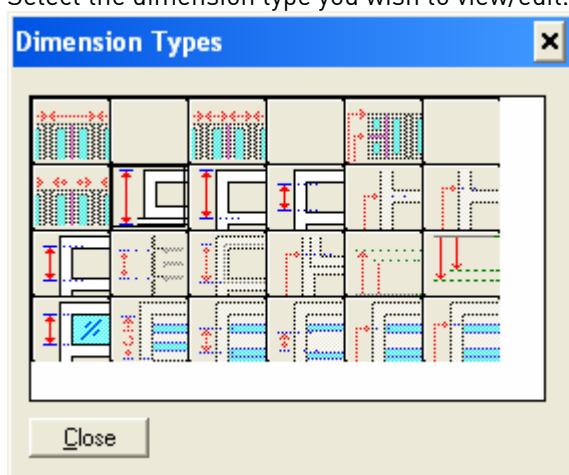
## How to select a Dimension Type

**Windowmaker** offers many different dimension types either for viewing only or for viewing and editing an item.

The current Dimension Type is always shown on the Solution page next to the item. The item dimensions displayed are always the current dimension type, for example, if the current Dimension Type is 'Show Glass Dimensions' then the item dimensions shown will be glass sizes and, if you edit dimensions in the mode, you are editing glass sizes.

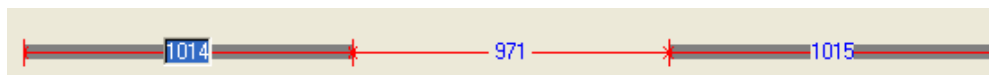
To change the Dimension Type:


- Click the button to open the 'Dimension Types' dialog
- Select the dimension type you wish to view/edit.



## How to equalize Dimensions

- Select the dimension line of the dimensions you wish to equalise.




- Click on the 'Equalise Dimension/Grid' icon . Alternatively, select Options | Equalise from the menu.

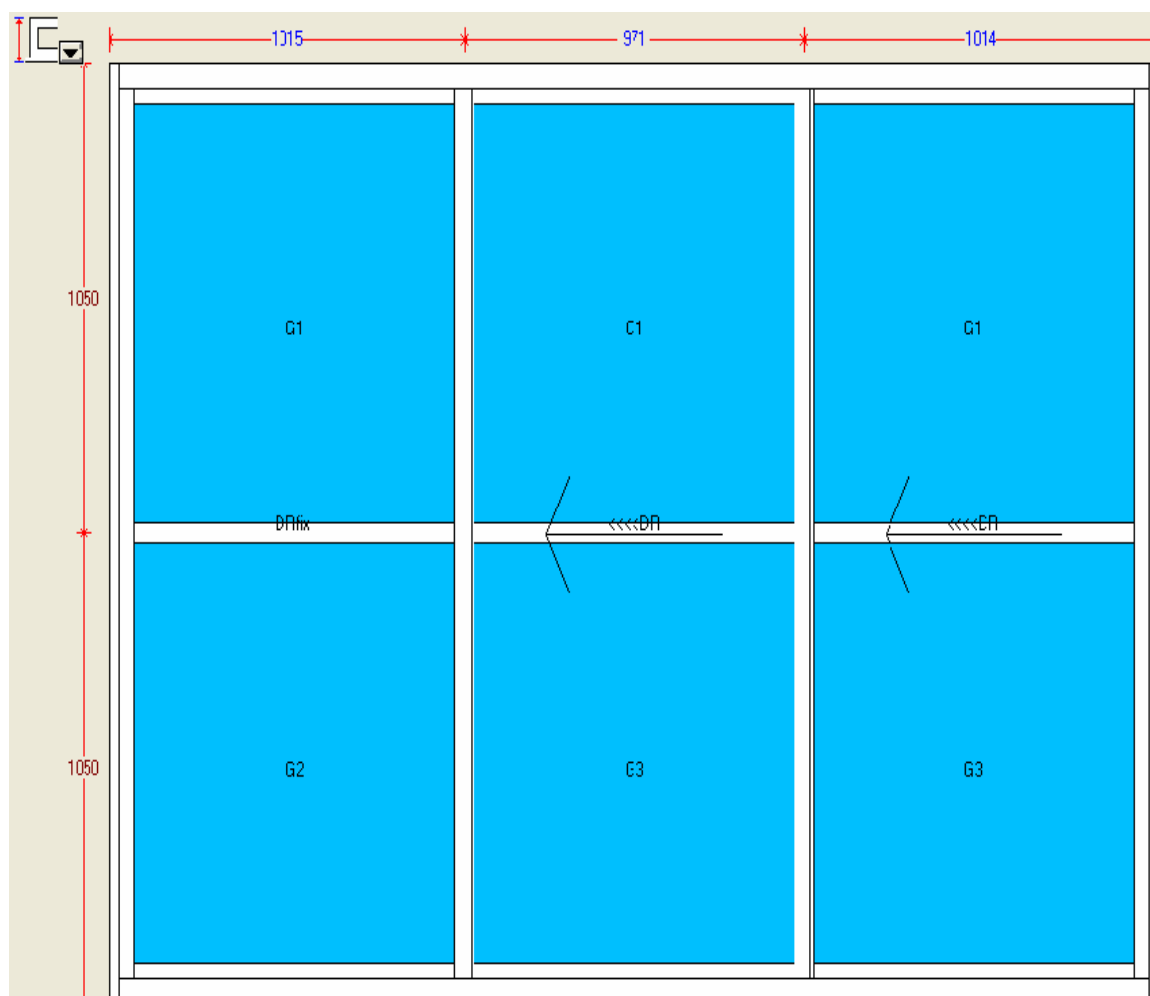
## How to undo the last edit

To undo the last item edit click on the Undo icon . Alternatively, select Options | Undo from the menu.

## How to apply a Glazing Specification

A Glazing Specification from the list on the 'Pane Types & Glazing' dialog can be applied to the selected panes.

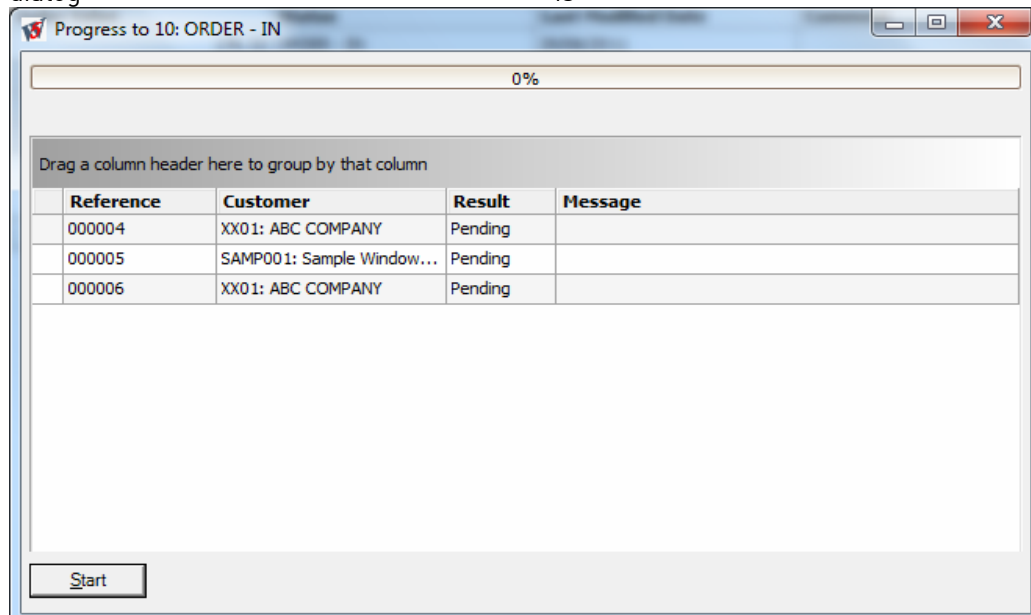
- Click the Glazing tool button  to open the 'Pane Types & Glazing' dialog alternatively, select Toolbox | Glazing from the menu.
- Select the panes for which you wish to change the glass.
- Select the Glazing specification you wish to use. Click on the **'Apply & Close'** button.
- The selected Glazing specification will be applied to the pane.
- The applied Glazing is denoted by 'Gx', where 'x' ranges from 1 to 7, and represents the pane on which the glazing has been applied.
- The actual glazing used in each pane will be displayed in a tool tip in item graphics, and on the Item - B.O.M. Page.



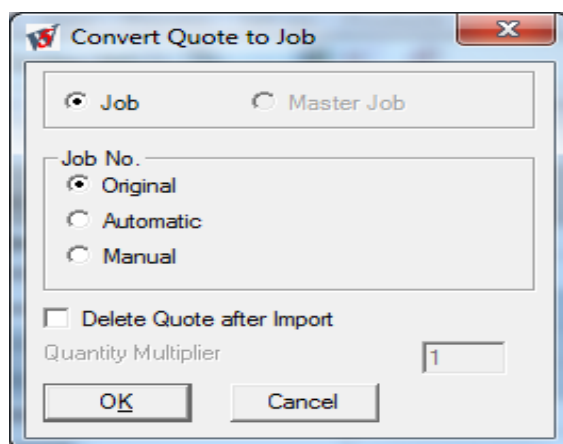
- The applied glazing will be displayed on the Glazing dialog and the glazing description field on the Solution page.

## How to Convert Quotes to Jobs

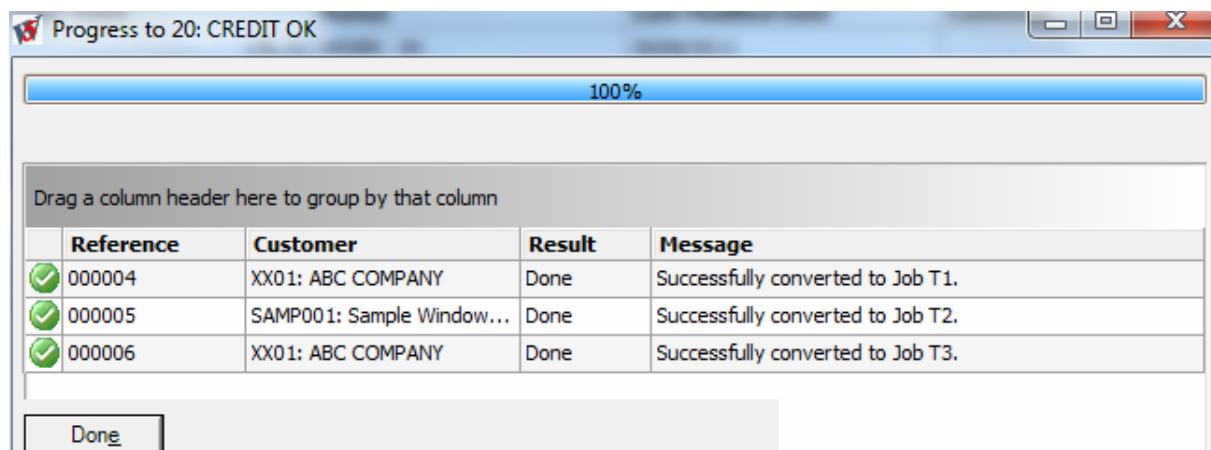
- Click on 'Open' on main menu of Windowmaker program. Select 'Quotes' from the 'View Jobs/Quotes/Credit Jobs' option.
- Filter the quotes list to display only quotes that should be converted to jobs.
- Click on 'Progress'.
- Select the status corresponding to 'Credit Ok', as specified in Preferences, and click it. Progress dialog is displayed.



- Press 'Start'.



- A progress bar is displayed. On completion the 'Start' button changes to 'Done'



- Press 'Done' to go back to the Quote set-up dialog is displayed.

## How to set-up My Details

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Menu: Setup | Reports | My Details

Use this to enter your details. These can be displayed on Customer Documents, Delivery Notes and Frame Purchase Orders, if the relevant fields have been set-up.

### Company

Displays the company name. Alternatively, enter a name of maximum 40 characters.

### Address

Enter an address of up to 5 lines with maximum 30 characters per line.

### Tel.

Enter a telephone number of maximum 30 characters.

### Fax

Enter a fax number of maximum 30 characters.


### Email

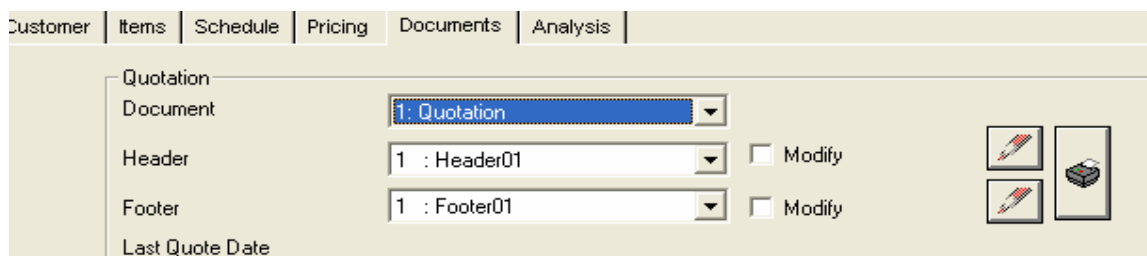
Enter an Email address of maximum 40 characters.

*The program only allow saving the email address in the correct format. (For e.g. abc@Window.com.au)*

## How to print Customer Documents


### Print a Quotation

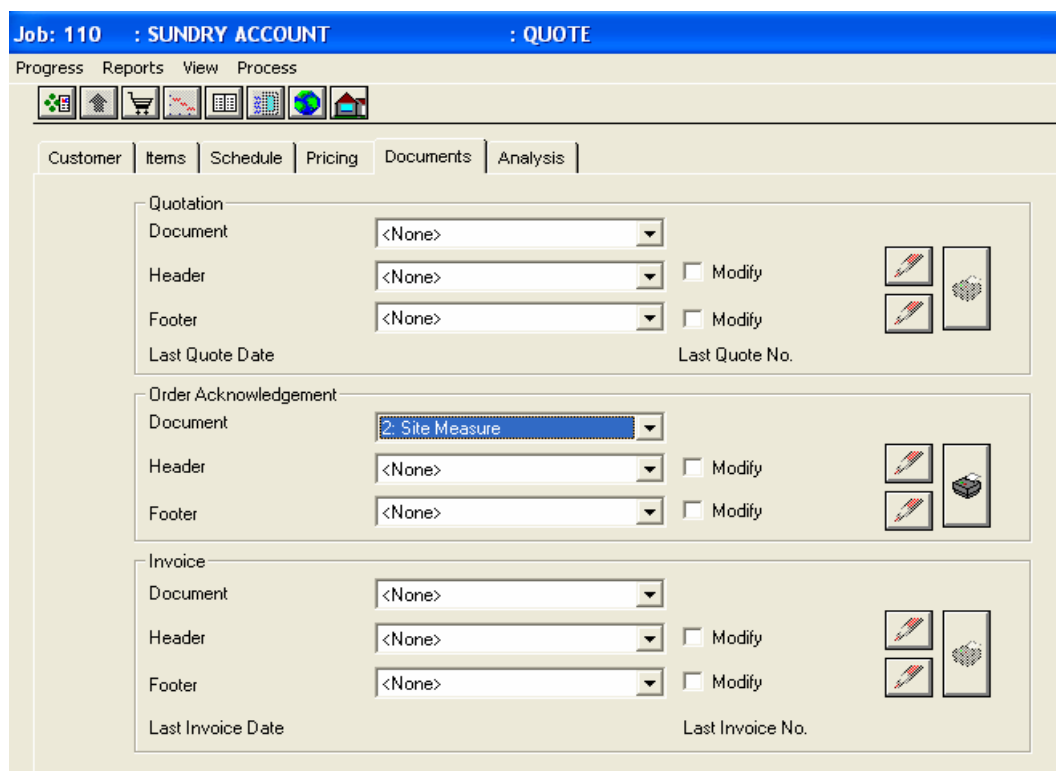
- After adding window/door items in to quote, go to the 'Documents' page.
- Select "Quotation" report from the list of quotations in the menu as highlighted in below dialog.
- Select a header/ footer from the list if you wish to add any introductory note etc.
- Click on  to generate a report.



You can also print your logo on Quotation.

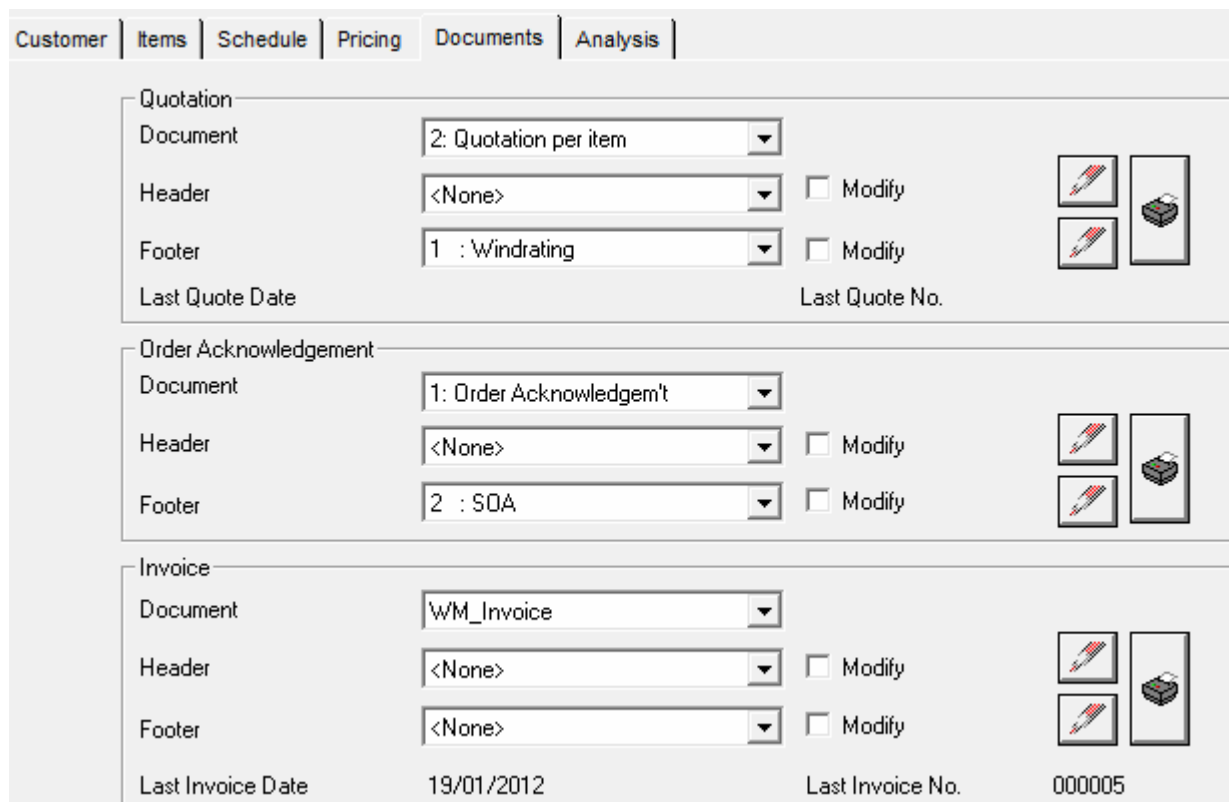
### Print a Delivery Docket\ Site Measure Report

- Once Job is created, go to the "Documents" page and select "Delivery Docket" or "Site Measure" from Order Acknowledgement report list. Select "Delivery Docket" to print delivery docket report.
- Click on  to generate a report.




## How to print an Invoice

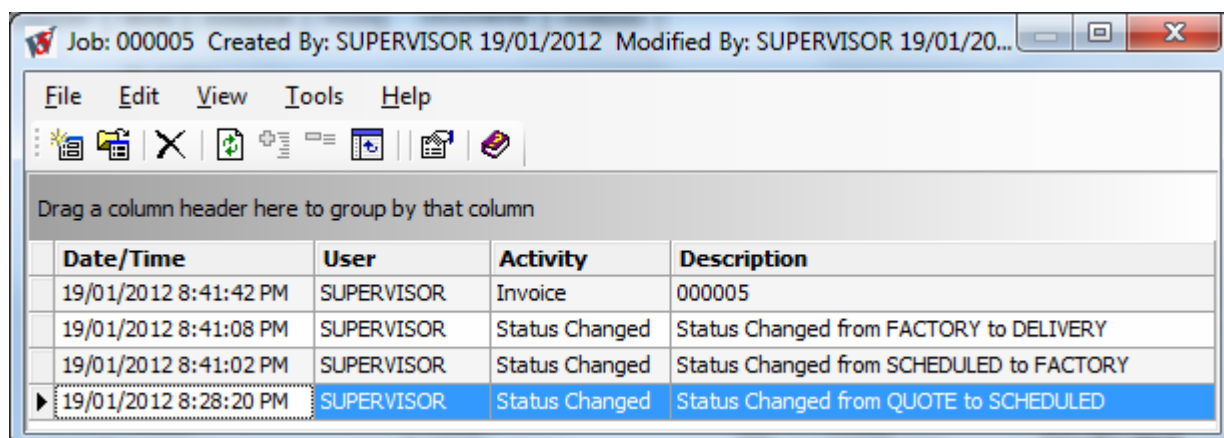
- Invoice Crystal report can be used to print the invoice details of a job. This facilitates preview of the invoice before printing it.
- It can be generated from the Reports menu on the 'Open Jobs/Quotes' and 'Jobs/Quotes – Documents' dialogue as shown below.



Section	Document	Header	Footer	Last Date	Last No.
Quotation	2: Quotation per item	<None>	1 : Windrating		
Order Acknowledgement	1: Order Acknowledgem't	<None>	2 : SOA		
Invoice	WM_Invoice	<None>	<None>	19/01/2012	000005

## To re-print an Invoice

- Open the job, invoice of which is required to be re-printed.
- Click  History button on the job notebook. The dialog as shown below appears.



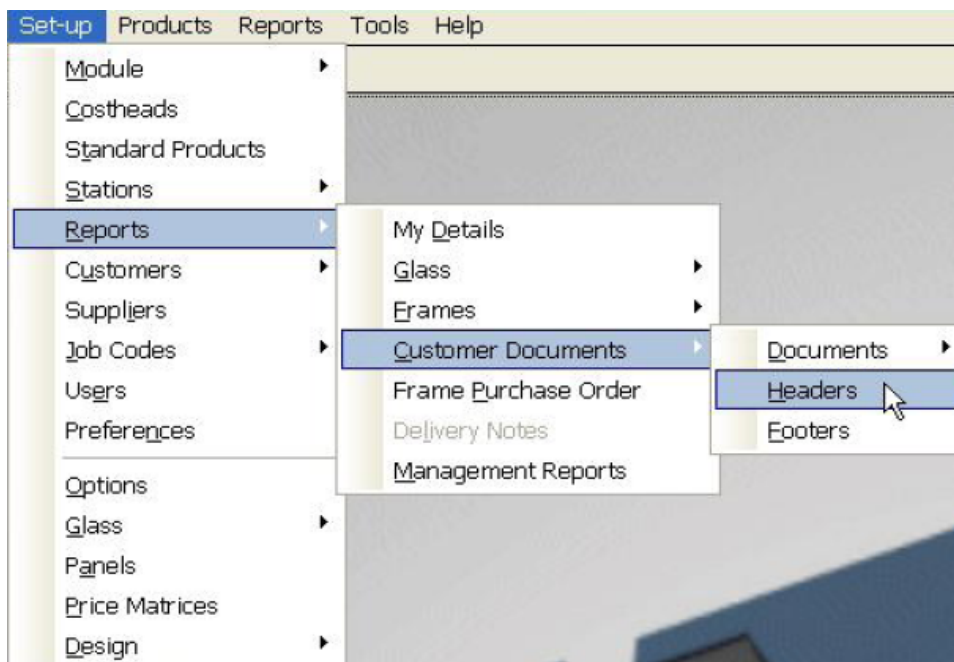
Date/Time	User	Activity	Description
19/01/2012 8:41:42 PM	SUPERVISOR	Invoice	000005
19/01/2012 8:41:08 PM	SUPERVISOR	Status Changed	Status Changed from FACTORY to DELIVERY
19/01/2012 8:41:02 PM	SUPERVISOR	Status Changed	Status Changed from SCHEDULED to FACTORY
19/01/2012 8:28:20 PM	SUPERVISOR	Status Changed	Status Changed from QUOTE to SCHEDULED

- Double-click the record of the Type 'Invoice'. The dialog as shown below appears.
- Click 'Print'. This opens the invoice in the associated application (e.g. Adobe Acrobat Reader).
- Now, you can print the invoice.

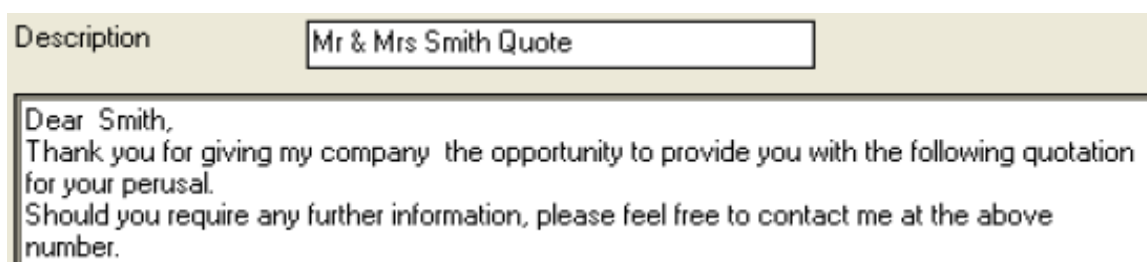


## Print your own Header (Introductory Note etc.) and Footer (Terms etc.) on Report

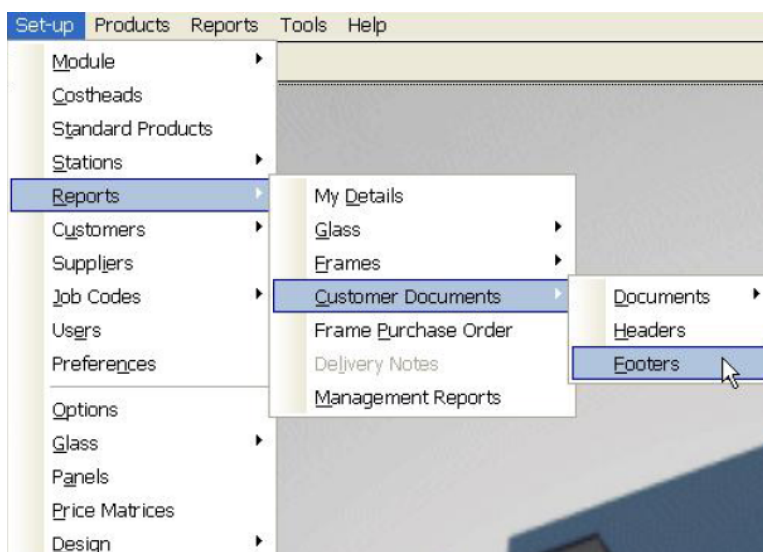
- To create a header, open Setup | Reports | Customer Documents | Headers.



- Open any existing header and change the description and the header/introductory notes.




- Click on OK at the bottom to save the changed header. Next time when you choose this header while printing any quotation this new text will appear as header text on the quotation.
- To create a footer, open Setup | Reports | Customer Documents | Footers.

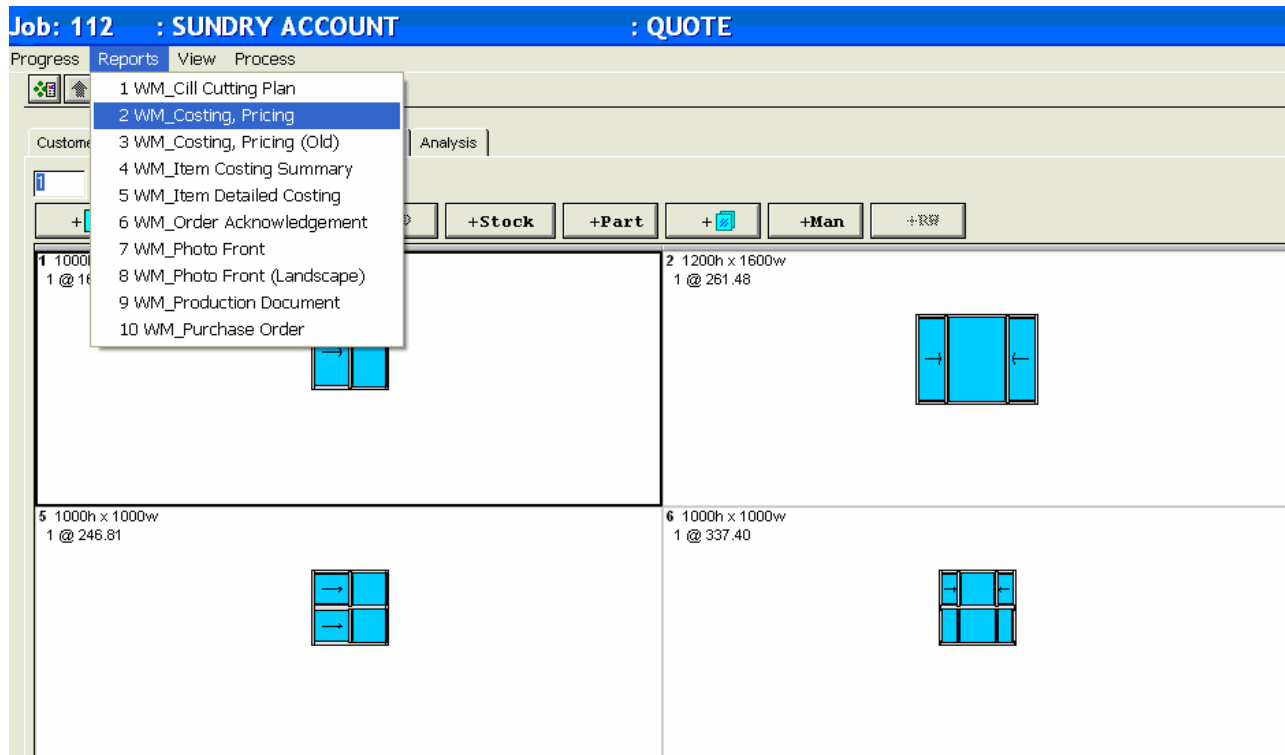


- Open any existing footer and change the description and the footer/terms notes.
- Click on OK at the bottom to save the changed footer. Next time when you choose this footer while printing any quotation this new text will appear as footer text on the quotation.

## How to print Costing/Pricing Report?

Costing/Pricing report can be used to display the Costing/Pricing information for a job.

The report can be generated for a job by clicking on the 'Report'  tool button or from the Report menu available on the job notebook.



Costing/Pricing report can be used to display the following information:

➤ **For Costing:**

Base, +/-, Waste, Cost.

➤ **For Pricing:**

Nett, mark-up, Current List Price, Actual Price.

*NOTE:*

*The records will be collated. Collation of records in Parts list will be done according to the sequence of Cost head, Description, Stock no., Size & Position. Actual will remain blank if Apply pro-rata to Items is checked.*

➤ **Item Costing**

Select this to display item level costing.

➤ **Job Costing**

Select this to display job level costing.

➤ **Item Pricing**

Select this to display item level pricing.

➤ **Job Pricing**

Select this to display job level pricing.

## How to produce Factory Documents

### Production Document Report

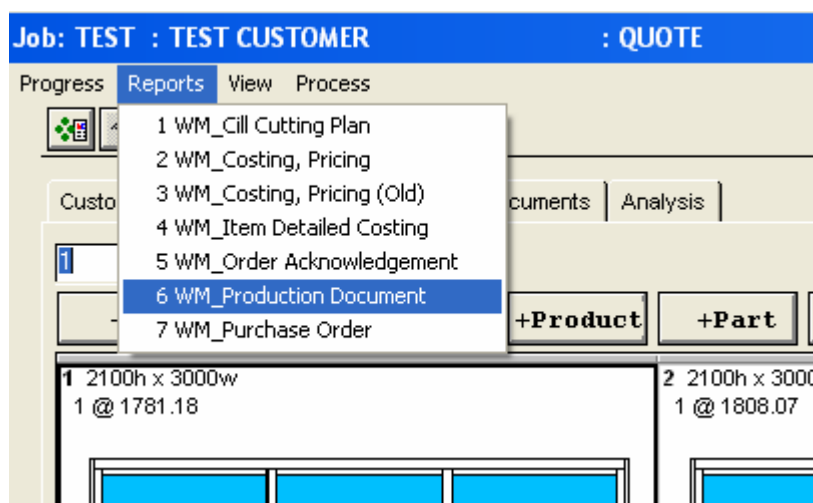
Production Document report can be used to display Assembly List information for any single item. This is mainly used before the item goes into the assembly line. The report outputs:

- Collated B.O.M. lines.
- A separate list for coupled designs.

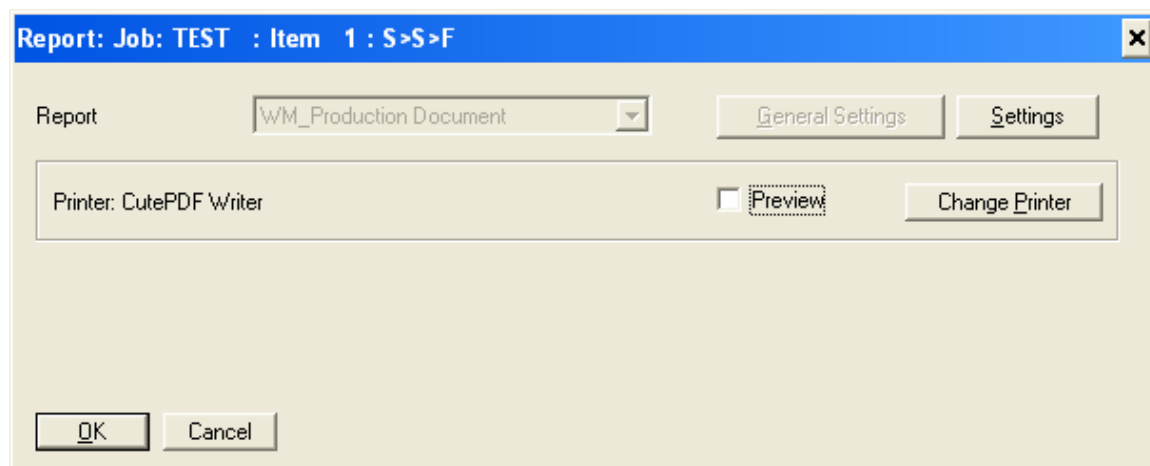
Along with the other details, the report also displays Stock No., Size and Position details as given on the B.O.M page of the Item notebook.

NOTE:

- Required date will be output in the report only when 'Required Date' is entered on the Job - Schedule page. Required Date and Material Receipt Date will be printed after every frame.
- Parts will not be printed if the 'Print' check box is unselected on the Set-up - Parts dialog.
- Each frame will be printed on a new page for Coupled Frames and single items.
- The report includes the 'Multiline Production Note' and the 'Design Description Multiline text' entered for an item. However, the Installation Note is not included in the Production Document report.
- The report can be generated for a job by clicking on the Reports Tool button or from the Reports menu available on the Job notebook.



- Click Ok to generate a report.



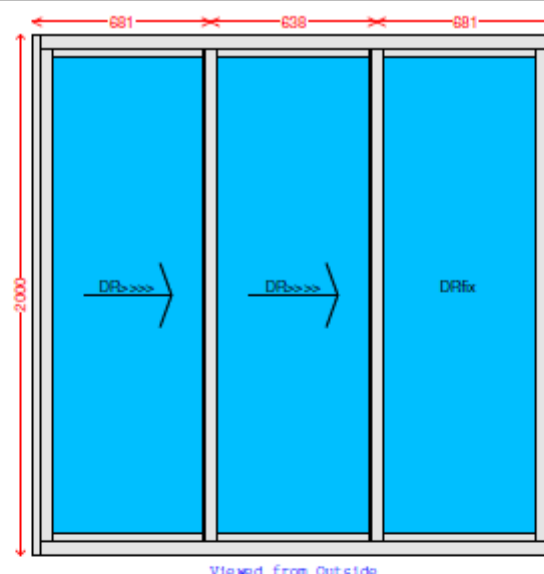
The below is the sample output of Production Document report:

**Production Document** **Windowmaker Software (Australia) Pty Ltd** **28-Jan-1**

**Job:** 130 / 0007

Account : XX01 SUNDRY ACCOUNT  
System : 130 LifeStyle Slide Door  
Design : 200  
Description : S>S>F  
Size : 2000h x 2000w  
Glazing : 6.38 CLEAR LAM.  
Quantity : 1

**SYSTEM** : 130 STACKING-SG  
**FRAME SIZE** : 125mm  
**FINISH** : MILL FINISH(00)  
**WINDLOAD** : N1 700  
**WATER RATING** : AUTO  
**DOOR TYPE** : STACKING SG  
**S/DOOR SILL** : LSS-377  
**LOCKSTILE DR** : LSS-305  
**INTERLOCK DR** : LSS-306/311  
**FLY DOOR** : FLY DOOR  
**FLY DR MESH** : ALUMINIUM  
**SEALS** : WOOLPILE  
**ROLLERS** : TWIN WHEEL SS  
**FLASHING** : NONE  
**LABOUR** : LIDCO  
**GLAZING** : FACTORY  
**INSTALLATION** : NO



Description	Stock No.	Qty.	Size	Cut	Pane
FLY DOOR - JAMB	LSS-384-00	2	2000h		
FLY DOOR - SILL	LSS-386-00	1	1950w	[ ]	
FLY DOOR - HEAD	LSS-385-00	1	1950w	[ ]	
FLY DOOR-INTERLOCK	LSS-383-00	2	1910h		DR>>>>/2
FLY DOOR-INTERLOCK	LSS-387-00	2	1914h		DR>>>>/2
FLY DOOR-INTERLOCK	LSS-388-00	1	1938h		DR>>>>/1
FLY DOOR-INTERLOCK	LSS-389-00	1	1938h		DR>>>>/1
FLYDOOR - FRAME	300-107-00	2	680w		DR>>>>/1
FLYDOOR - FRAME	300-107-00	2	680w		DR>>>>/2
FLYDOOR - FRAME	300-107-00	2	1959h	[ ]	DR>>>>/1
FLYDOOR - FRAME	300-107-00	2	1959h	[ ]	DR>>>>/2
HEAD-STACK DOOR	LSS-375-00	1	1950w	[ ]	
INSERT SILL-STD	LSS-376-00	1	1950w	[ ]	
INTERLOCK - SD	LSS-306-00	2	1936h		DR>>>>/2
INTERLOCK - SD	LSS-306-00	2	1936h		DRfix /1
INTERLOCK-SD H/D	LSS-311-00	2	1936h		DR>>>>/1
INTERLOCK-SD H/D	LSS-311-00	2	1936h		DR>>>>/2
JAMB-STACK DOOR	LSS-379-00	2	2000h		
RAIL-STACK DOOR	LSS-382-00	4	581w	[ ]	DRfix /1
RAIL-STACK DOOR	LSS-382-00	4	582w	[ ]	DR>>>>/1
RAIL-STACK DOOR	LSS-382-00	4	582w	[ ]	DR>>>>/2
RECEIVER - SD	LSS-380-00	2	1915h		DR>>>>/1
RECEIVER - SD	LSS-380-00	2	1918h		DRfix /1
SILL-STACK DOOR	LSS-377-00	1	1950w	[ ]	
STILE-SD FIXED	LSS-305-00	2	1936h		DR>>>>/1
STILE-SD FIXED	LSS-305-00	2	1936h		DRfix /1
THRESHOLD - STD	LSS-381-00	4	637w	[ ]	
THRESHOLD - STD	LSS-381-00	4	1266w	[ ]	
POCKET FILLER	700-506-00	2	2000h		
BLACK HOLE PLUG	03-239	10			
CORNER STAKE FLYDF	09-109	8			
CUSHIONING STRIP	02-242	1	4000		
DOOR SEAL BLACK	02-116	1	5808		

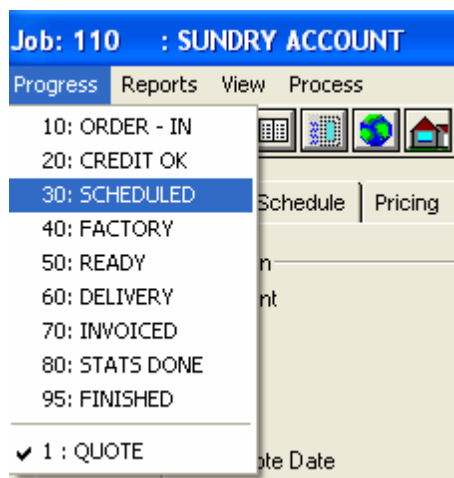
1...

**Production Document**
**Windowmaker Software (Australia) Pty Ltd**
**28-Jan-1**

DOOR STOP	02-156	4		
FLYDOOR PULL	09-096	2		
GLAZING CHANNEL6mr	04-065	1	29396	
INTLOCKBUFFER 40mn	03-241	4		
JOINT GASKET KIT	05-530	1		
SILL BAFFLE	02-510	1	1950	
WOOLPILE 4mm	02-015	1	12000	
WOOLPILE 4mm	02-015	1	15488	
WOOLPILE 6.3mm	02-016	1	12000	
WOOLPILE 6.3mm	02-016	1	15752	
8x12 SS ST	SCREW	18		
8x50PH SS ST	SCREW	12		
ALUMIN MESH BLACK	91cm 50mr	1	3872	
DOVE	SCREW	2		
RIBBED SPLINE F/G	6.0mm	1	10440	
RIVET FIXING	3mm Rivet	13		
RIVET FIXING	4mm Rivet	4		
SCREW 8x25 SS ST	SCREW	54		
TRUSS HEAD RIVET	5mm Rivet	32		
DOOR STOP	01-550	4		
FLYDOOR ROLLER	01-041	8		
SASH CORNER CLIP	01-300	12		
SS DOOR ROLLER	01-122	6		
Insect Door Size	Slide	1	1909h x 576w	DR>>>>/1
Insect Door Size	Slide	1	1909h x 576w	DR>>>>/2
<b>Glass</b>		<b>Qty.</b>	<b>Size</b>	<b>Pane</b>
6.38 CLEAR LAM.		1	1846h x 603w	DRfix /1
6.38 CLEAR LAM.		1	1846h x 604w	DR>>>>/2
6.38 CLEAR LAM.		1	1846h x 604w	DR>>>>/1

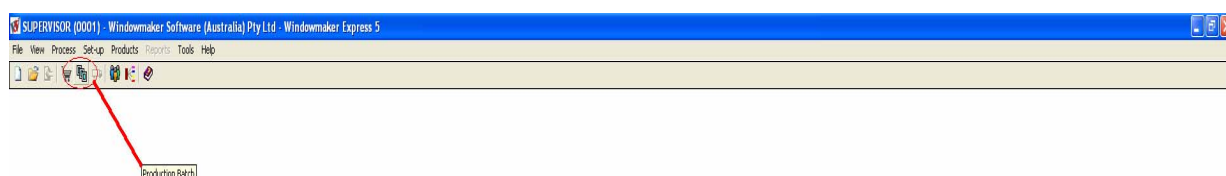
## How to print Bill of Material for Metal

- Update the status for a job to "30: SCHEDULED". Go to the progress menu and select Status 30.



*Windowmaker will not allow generating any factory document for a job if Job status not at Scheduled.*

- Close all open windows and go to main Windowmaker page. Now click on " Production Batch" icon to select a job into the batch to generate factory production reports.



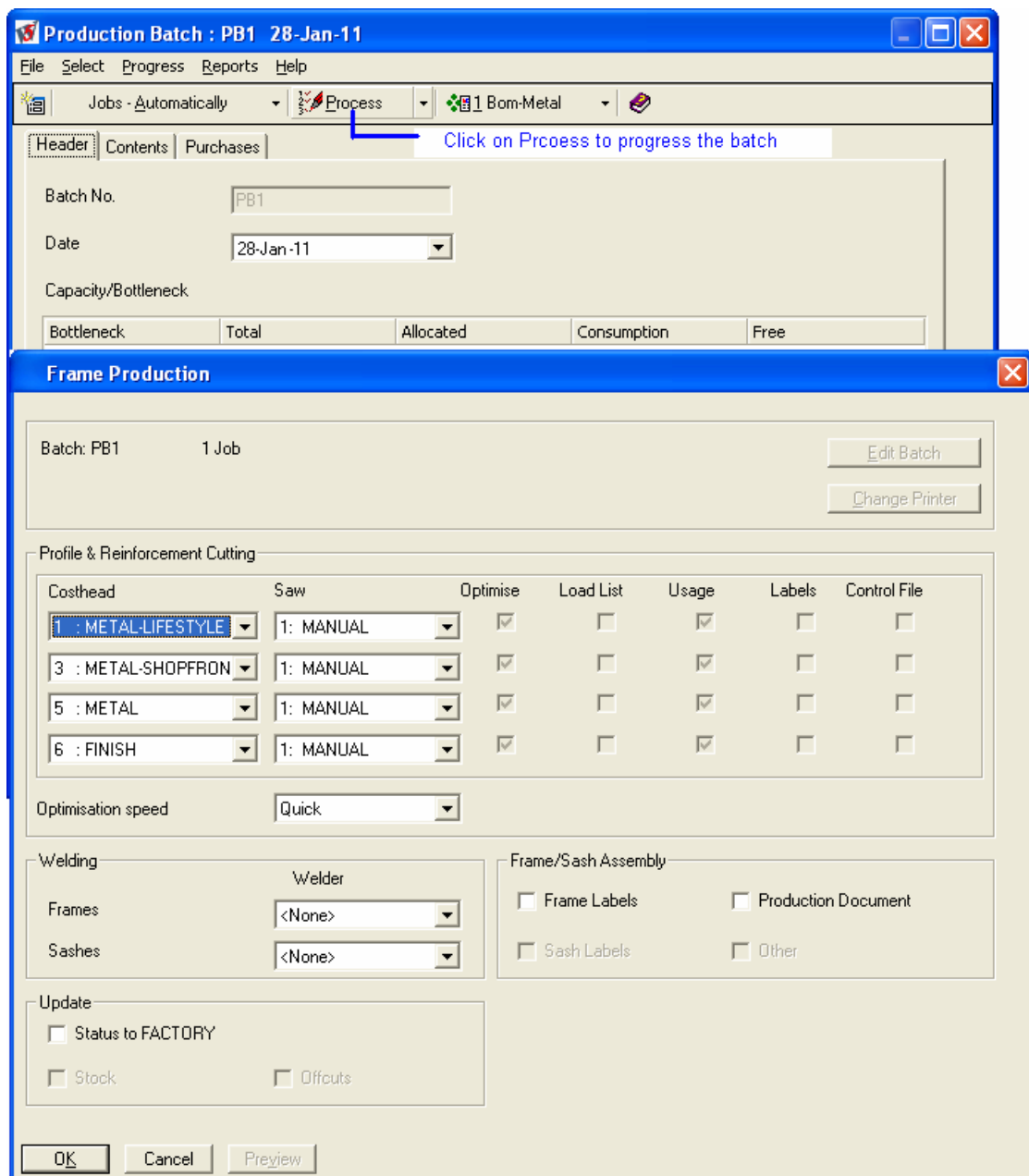


- Click on New to create a new batch. Select Batch no for new batch. Press Tab.

*If a batch already existed, a confirmation message will be displayed and the existing content will be deleted. 'Batch No.' field will now become editable.*

- Click on a Jobs-Manually that you want to process and then click on the 'Add' button in the middle of the dialog. The selected job will be moved on the right side.  
*Multiple continuous or discontinuous jobs can be selected and added.*

- Press OK.
- Now click on "Process" to optimize profiles for selected jobs.



**Production Batch : PB1 28-Jan-11**

File Select Progress Reports Help

Jobs - Automatically Process Bom-Metal

Header Contents Purchases

Batch No. PB1

Date 28-Jan-11

Capacity/Bottleneck

Bottleneck	Total	Allocated	Consumption	Free

**Frame Production**

Batch: PB1 1 Job

Edit Batch

Change Printer

Profile & Reinforcement Cutting

Costhead	Saw	Optimise	Load List	Usage	Labels	Control File
1 : METAL-LIFESTYLE	1: MANUAL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 : METAL-SHOPFRON	1: MANUAL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 : METAL	1: MANUAL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6 : FINISH	1: MANUAL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Optimisation speed Quick

Welding

Frames <None>

Sashes <None>

Welder

Frame/Sash Assembly

☐ Frame Labels ☐ Production Document

☐ Sash Labels ☐ Other

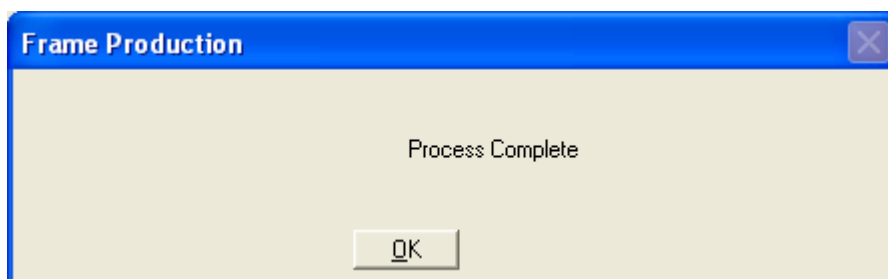
Update

☐ Status to FACTORY

☐ Stock ☐ Offcuts

OK Cancel Preview

- Press Ok when "Frame Production" report has been generated.



**Frame Production**

Process Complete

OK

- Click on the 'OK' button.
- Now click on "Bom\_Metal" report to generate Bill of Material for all profiles only.

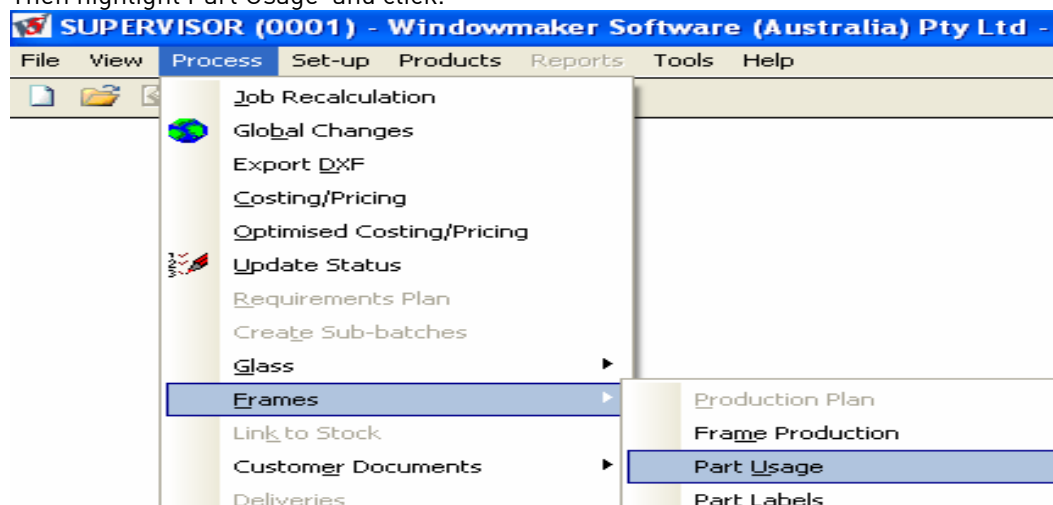


Below is a sample Part Usage output:

Cutting List		Windowmaker Software (Australia) Pty Ltd			28-Jan
Batch: 1/PB1: 28-Jan-11 Station: MANUAL					
Job	Item	Slot	Qty.	Size	
SILL		LSS-100-00		Finish: MILL FINISH(00)	2 x 5500
	Total	9	8908		2
HEAD		LSS-101-00		Finish: MILL FINISH(00)	2 x 5500
	Total	6	5992		2
RAIL		LSS-102-00		Finish: MILL FINISH(00)	2 x 6500
	Total	20	6900		2
INTERLOCK - SW		LSS-103-00		Finish: MILL FINISH(00)	2 x 5000
	Total	10	7402		2
STILE- SW		LSS-104-00		Finish: MILL FINISH(00)	2 x 5000
	Total	9	6454		2
BEAD		LSS-106-00		Finish: MILL FINISH(00)	4 x 5000
	Total	29	16870		4
HEAVY DUTY TRANSOM		LSS-117-00		Finish: MILL FINISH(00)	1 x 6500
	Total	3	2916		1
JAMB - ALTERNATE		LSS-122-00		Finish: MILL FINISH(00)	1 x 5450
	Total	2	1920		1
STILE-SW BI-PART		LSS-123-00		Finish: MILL FINISH(00)	1 x 5000
	Total	1	948		1
MULLION - SW		LSS-128-00		Finish: MILL FINISH(00)	2 x 5000
	Total	14	9477		2
EXTENDED JAMB SW		LSS-130-00		Finish: MILL FINISH(00)	3 x 5000
	Total	12	11920		3
HEAD - SW		LSS-155-00		Finish: MILL FINISH(00)	1 x 6500
	Total	1	1132		1
SILL - SW		LSS-156-00		Finish: MILL FINISH(00)	1 x 6500
	Total	1	1132		1
FLYSCREEN		400-673-00		Finish: MILL FINISH(00)	2 x 5000
	Total	16	9480		2
PINE 110x19		PINE 110			4 x 3000
	Total	8	8632		4

## Print Bill of Material for Hardware

- Click on 'Process' on the menu bar and then highlight 'Frames'.
- Then highlight 'Part Usage' and click.



- Click on 'Quick' radio button under Optimisation.
- Click on the 'OK' button to print the report.

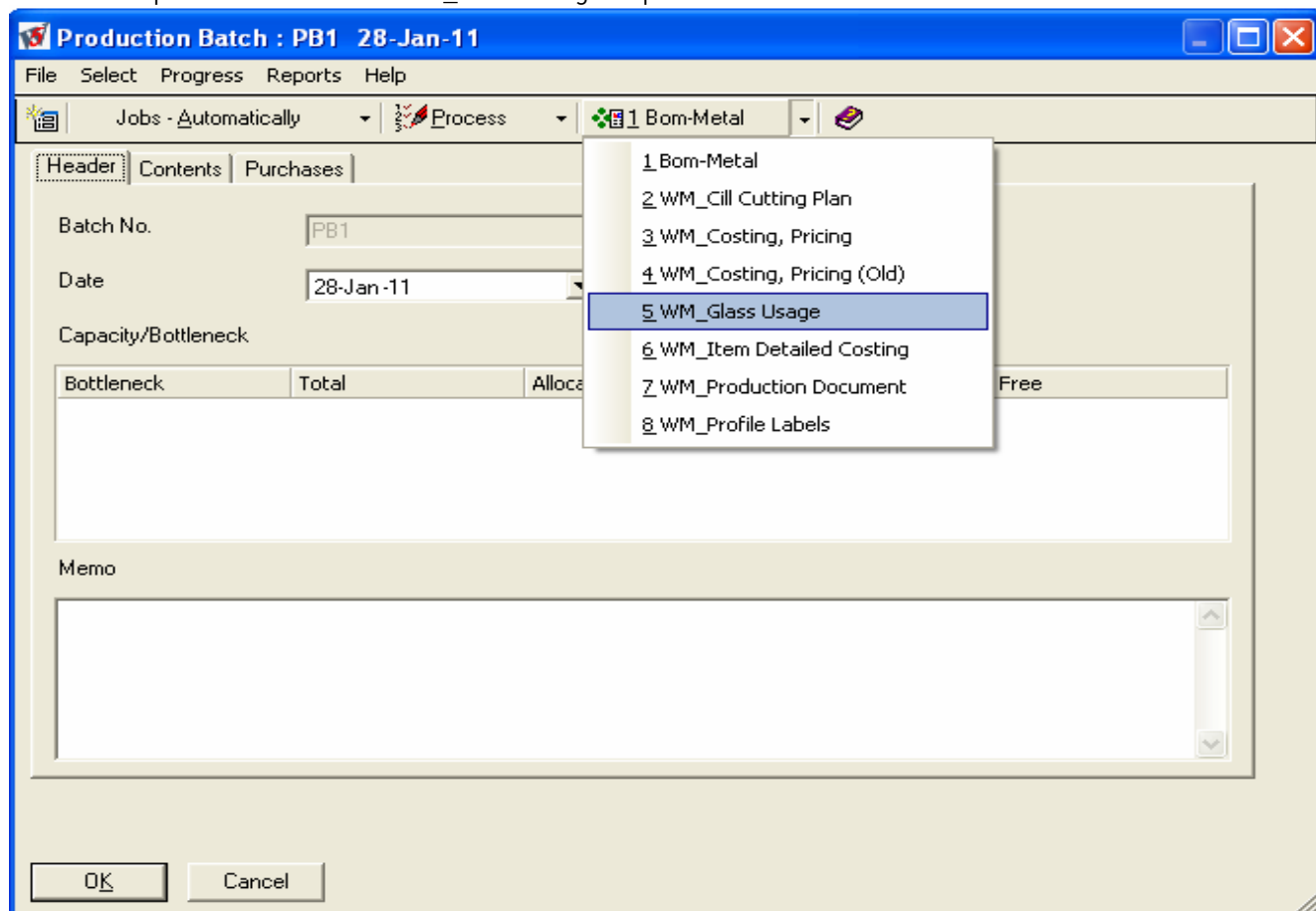
## How to print Glass Usage Report

This report outputs the Glass Usage details for a batch. The Glass Usage report can be used:

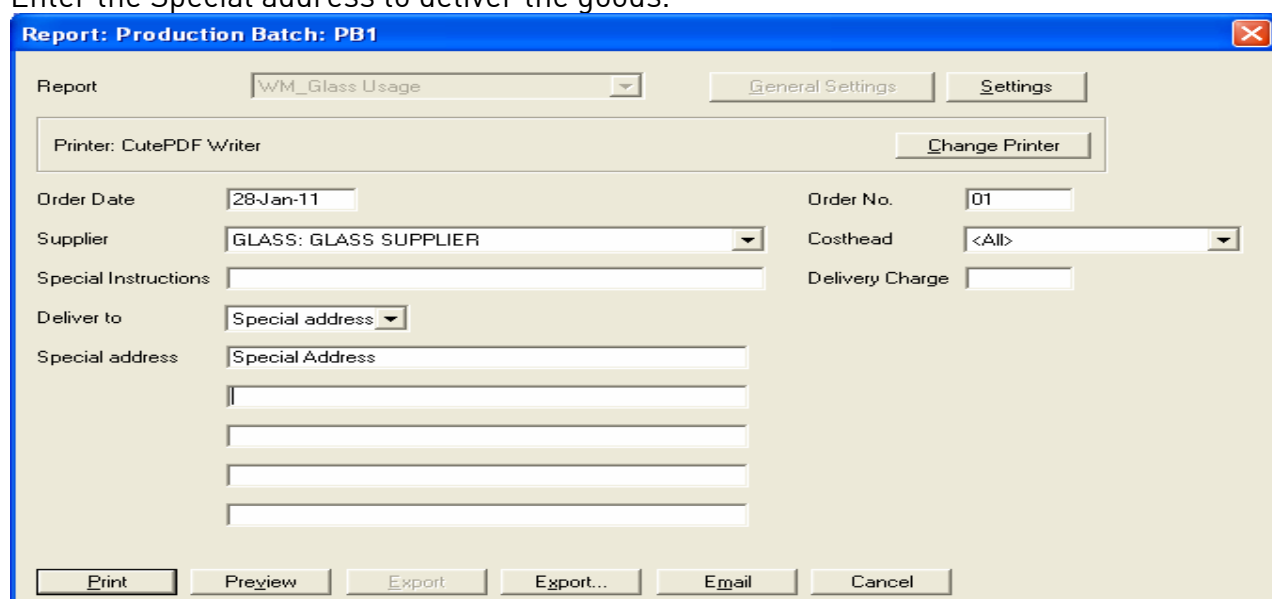
- To print and send the Glass Usage details to the shop floor when the batch is sent for production.
- As a Purchase Order to purchase the glass for the batch by sending the report to the Glass supplier.

**To generate a report:**

- From reports menu click on 'WM\_Glass Usage' report



- Enter the Order number for which the report is to be printed.
- Enter the Special address to deliver the goods.



The screenshot shows the 'Report: Production Batch: PB1' window. The 'WM\_Glass Usage' report is selected. The window contains fields for 'Order Date' (28-Jan-11), 'Supplier' (GLASS: GLASS SUPPLIER), 'Special Instructions', 'Deliver to' (Special address), 'Special address' (Special Address), 'Order No.' (01), 'Costhead' (<All>), and 'Delivery Charge'. The 'Print' button is highlighted.

If 'Production Site' or 'My Details' is specified for Deliver To, any information entered in the 'Special Address' fields will be ignored.

- On the 'Glass Usage' dialog click on the '**Settings**' button. Click on the 'Location' check box so that it becomes ticked.
- Click on the '**OK**' button to accept the changed settings.
- Click on the '**OK**' button to print the report.

Below is a sample Glass Usage output:

### Purchase Order

**Windowmaker Software (Australia) Pty Ltd**

Level 2, 191 Botany Road  
Alexandria  
NSW 2015

**Order Date:** 28-Jan-11  
**Order No.** : 1

**To:**

GLASS SUPPLIER

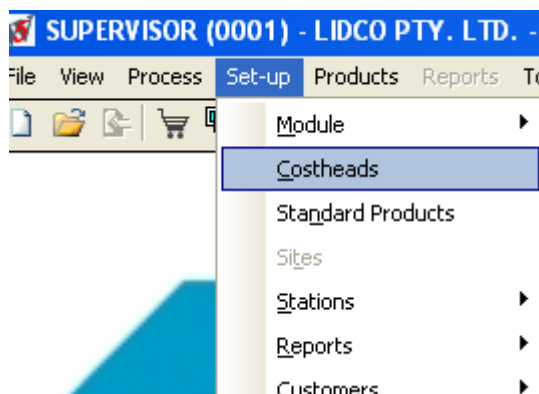
**Deliver to:**

Special Address

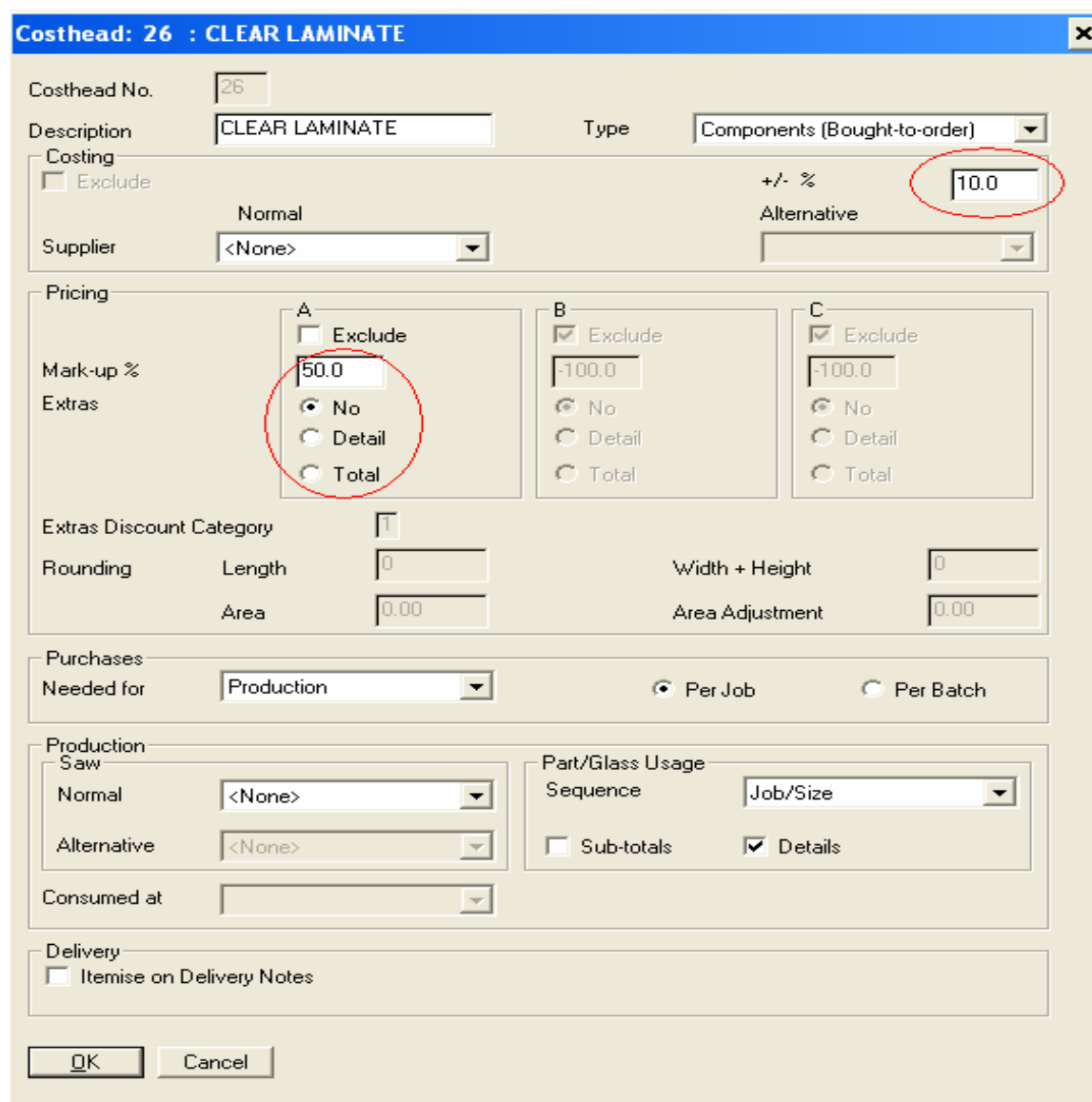
Costhead		CLEAR FLOAT				Batch: PB1	
Job/Item	Pane	Qty.	Size	Shape	Area	Reference	Location
<b>4MM CLEAR FLOAT</b>							
110 /001	FIXED /1	1	910h x 549w		0.500		
110 /007	FIXED /1	1	900h x 543w		0.489		
110 /001	>>>>>/	1	868h x 550w		0.477		
	1						
110 /007	>>>>>/	1	862h x 550w		0.474		
	1						
<b>Subtotal</b>		<b>4</b>			<b>1.940</b>		
<b>5MM CLEAR FLOAT</b>							
110 /002	FIXED /1	1	950h x 480w		0.456		
110 /003	FIXED /1	1	950h x 213w		0.202		
110 /003	FIXED /2	1	950h x 213w		0.202		
110 /003	<<<<</	1	908h x 235w		0.213		
	1						
110 /003	>>>>>/	1	908h x 235w		0.213		
	1						
110 /002	>>>>>/	1	908h x 220w		0.200		

## How to change Costing/Pricing Mark-up % for various Costheads

- Click on 'Set-up' on the menu bar and then click on 'Costheads'.




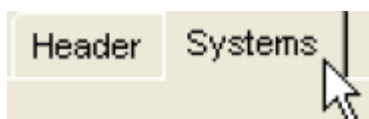
- Open any Costhead for which you want to change Costing/Pricing Markup %.



- As shown in above dialog with Red mark, change the Markup % for costing and pricing.□
- You should ensure that costing/pricing markup % for all costheads is as per your requirement before you start creating live jobs.

## How to apply Mark-up % on different Systems/Suites

- Click on ←Main→ Module icon  on main page.
- Click on Systems.



- Open any system for which you want to apply Markup %.
- Enter Mark-up % in the box marked in red color in above dialog.

**System: SY08 LIFESTYLE SLIDE DOOR**

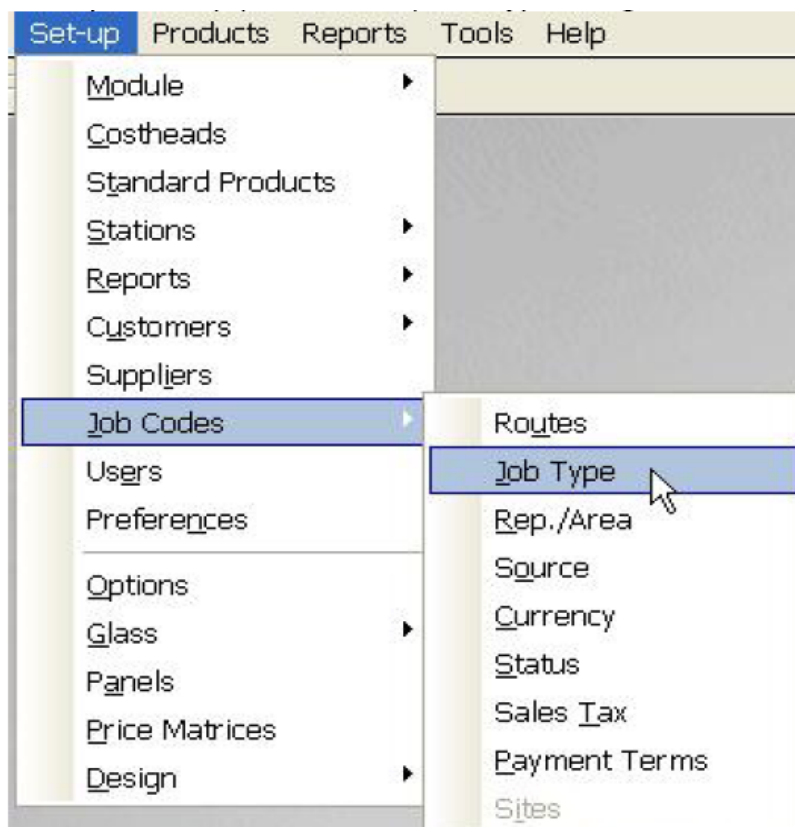
Catalog	<Main>	Display Sequence	0
System	SY08	Roof System	CV
Description	LIFESTYLE SLIDE DOOR	ISO 10077-1	
System Type	Designs	U-value	
Material	<Not Known>	Hotbox Test Results	
Frame Depth	0.0	Frame U-value	
Tax		Glazing U-value	0.00
<input type="checkbox"/> Tax from Customer			
Tax	2: G.S.T.		
Mark-up %	25		
Coupled Designs		Glazing	
<input type="radio"/> Separate Assembly List		<input type="radio"/> Internal	
<input checked="" type="radio"/> Single Assembly List		<input checked="" type="radio"/> External	
Maker Glass Node	0: <None>	Glazing Thickness	
Calculate Glass at Rule No.	1		
Calculate Stuck-on Georgian at Rule No.	0		

Lower	Upper
4.1	12.0
14.0	25.0
0.0	0.0
0.0	0.0
0.0	0.0
0.0	0.0
0.0	0.0

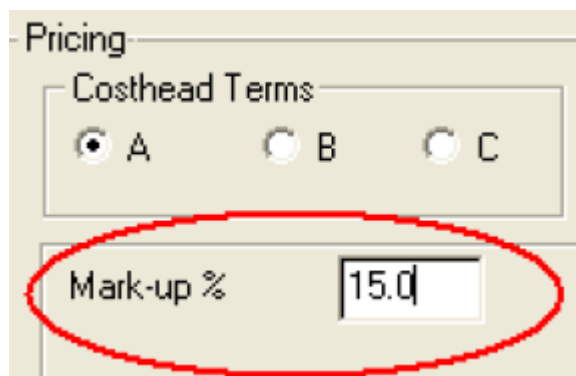
- This Mark-up % will apply to all items created with this system.

## How to apply Mark-up % on entire Job

- Open Setup | Job Codes | Job Type using the menu.



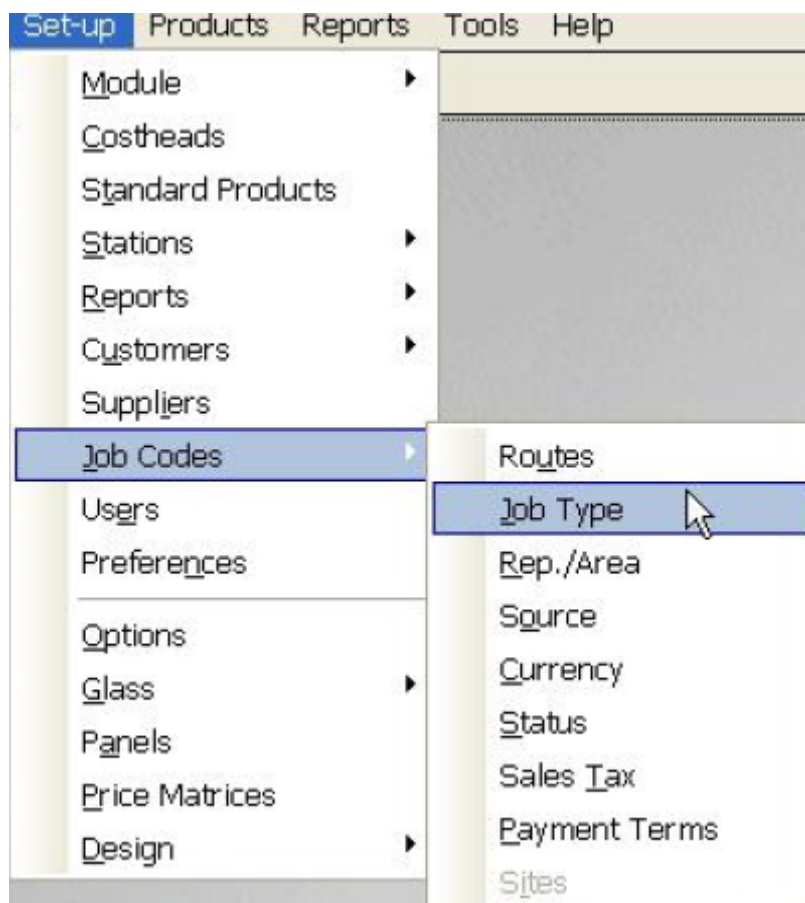
- Open the job type for which you want to change Mark-up %.
- Change the Mark-up % in the box marked with red color in below screen shot.



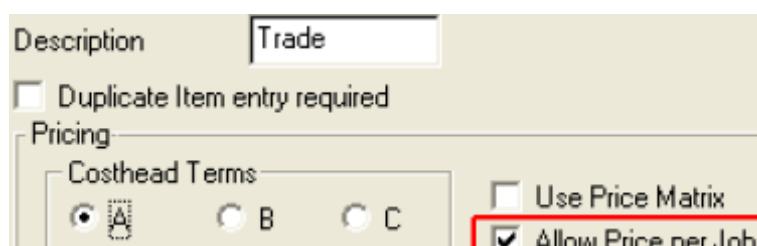
- Click 'OK' to save the changes.
- It will now apply this Mark-up % on the total job price.

## How to change Job Price

- First of all the job type has to be set-up to allow price per job. Open Setup | Job Codes | Job Type.

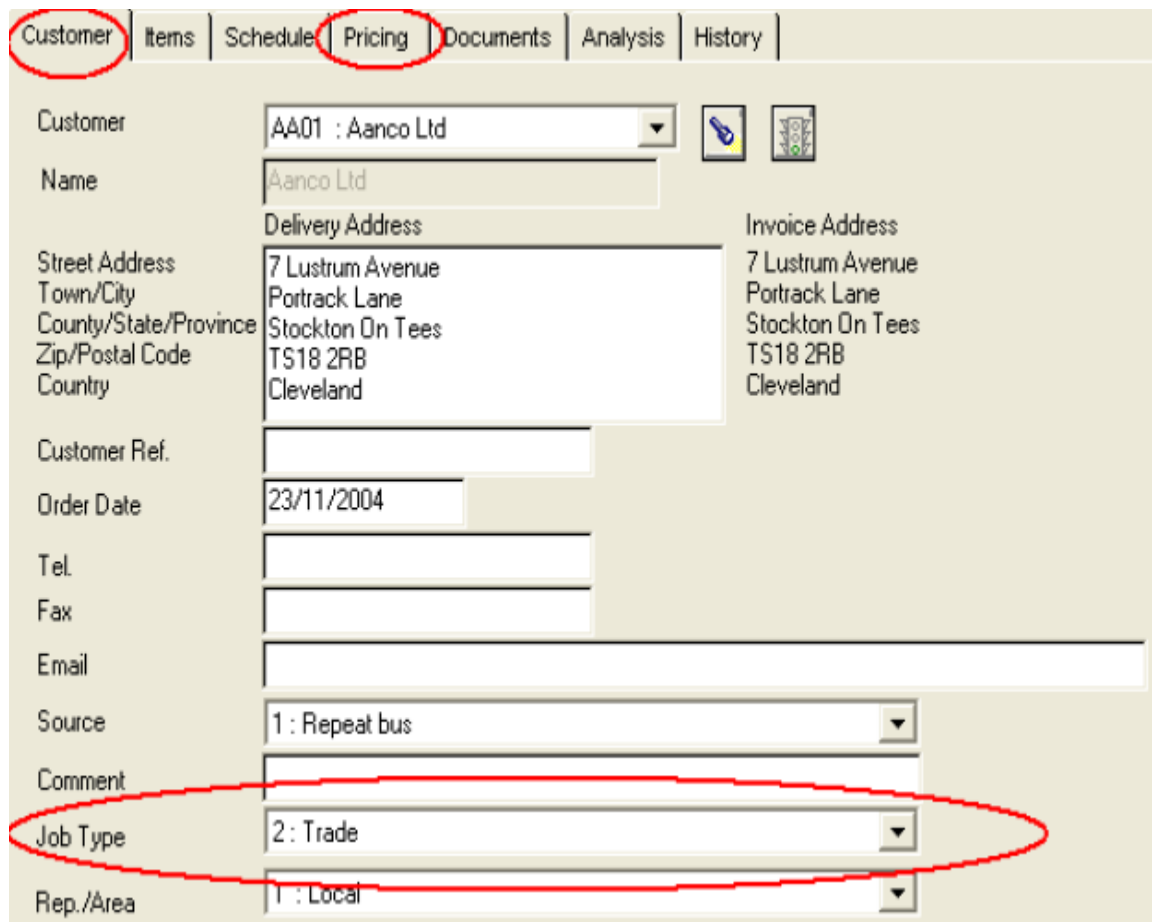


- Open the job type for which you want to allow entering price per job.
- Tick the checkbox for "Allow Price Per Job".



- Click the OK button at the bottom to save the changed job type.

- Now create a new job and select proper job type on the Customer page.

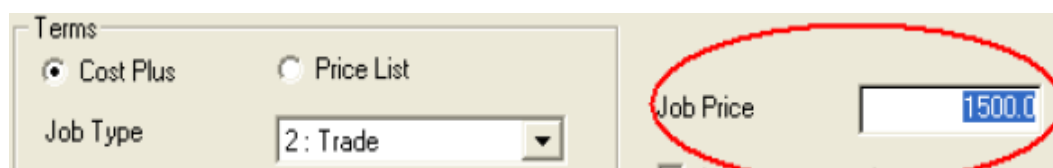


- Then click on the Pricing page at top.



- Click on the Special Terms icon.

- Enter the job price value.

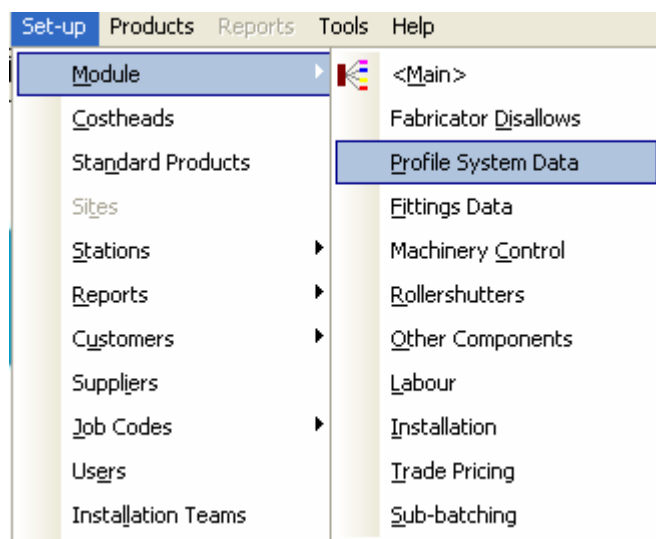


- Click on OK button at the bottom to save the Job Price. Now the Job price will remain this value regardless of the items you make.

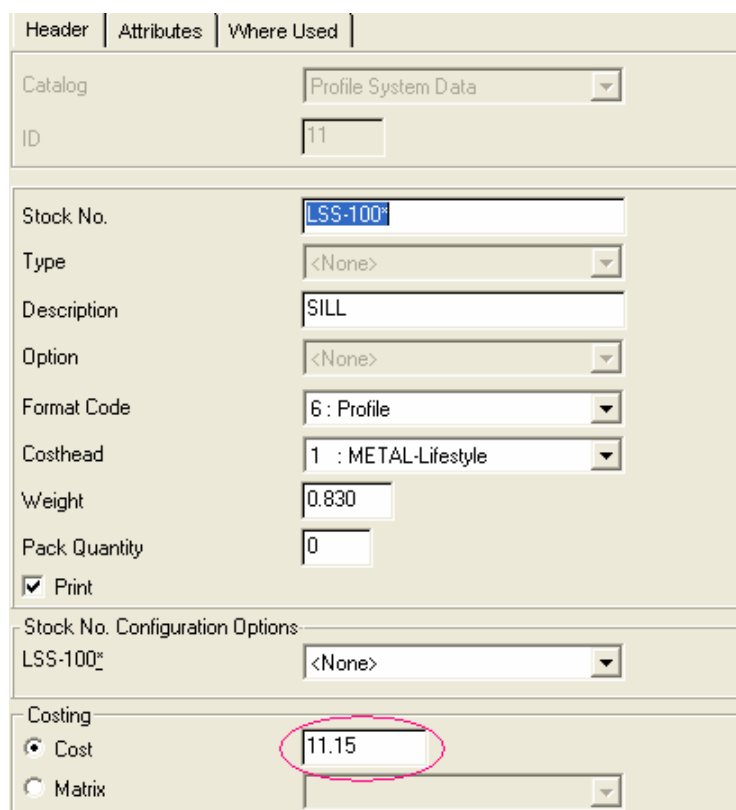


## How to change Cost\Price of parts

- Windowmaker stores parts in various modules like <Main>, Profile system data, Fittings data, Labour etc. So, you need to locate the part in relevant module. E.g. you will generally find that profile parts like head, jamb, sill etc. are stored in Profile System data Module while Fittings related parts are stored in Fittings Module.
- Say you want to change cost of a profile part which is located in the Profile System data module. To access that part, open Setup | Module | Profile System Data.



- Click on the Part button.
- It will open up the Parts file. Highlight the Part whose cost you want to change and then click on Open button at the bottom.
- Change the cost as shown in below dialog in the highlighted red color.



The screenshot shows the 'Where Used' dialog box with the following fields:

- Header | Attributes | Where Used
- Catalog: Profile System Data
- ID: 11
- Stock No.: LSS-100\*
- Type: <None>
- Description: SILL
- Option: <None>
- Format Code: 6 : Profile
- Costhead: 1 : METAL-Lifestyle
- Weight: 0.830
- Pack Quantity: 0
- ☒ Print
- Stock No. Configuration Options: LSS-100\* <None>
- Costing:
  - ☒ Cost: 11.15 (highlighted with a red circle)
  - ☐ Matrix

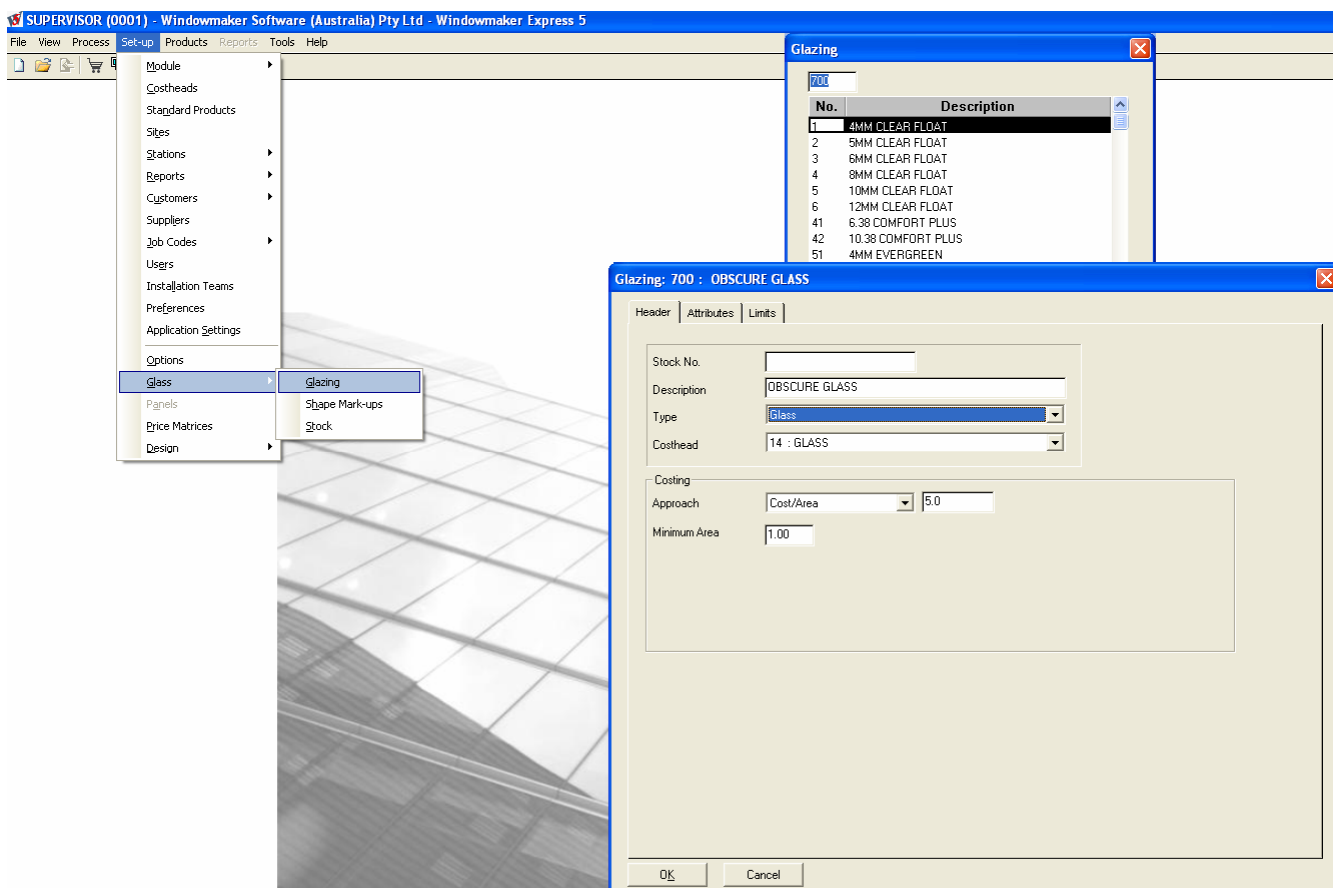
- Click on OK button at the bottom to save the part with the new cost.

## How to add a new glass

- Go to setup |Glass and select Glazing.
- Add a new record and click "Open".
- Setup Description for the glazing.
- Enter the cost/area of the glass
- Specify the costing approach.

	Available for Format Type:	
<b>Cost/Area</b>	Glass, all type of Sealed Units, Pattern, all types of Grids, Leaded, Process (Leaf), Process (Unit), Associat	Enter the cost/area of the glass
<b>Matrix</b>	All types of Sealed Units	Specify a cost matrix to be used.
<b>Fixed Cost</b>	Pattern, all types of Grids, Leaded, Process (Leaf), Process (Unit), Associated	Enter the cost of the glass.
<b>Surcharge %</b>	Pattern, all types of Grids, Leaded, Process (Leaf), Process (Unit), Associated	Enter a surcharge to be applied on the glass cost.

- Enter the minimum area for costing. If the area of a piece is less than this minimum area, the cost derived for the piece is multiplied by the minimum area. If the piece area is more than this minimum area, the cost is multiplied by the piece area. *Available for Glass and all types of Sealed Units*



- Tab on Attributes page and setup Glazing Thickness for new record.
- Tab on limits page to setup newly created glazing limits as per Australian Standard 1288.
- Click on OK button at the bottom to save the record.

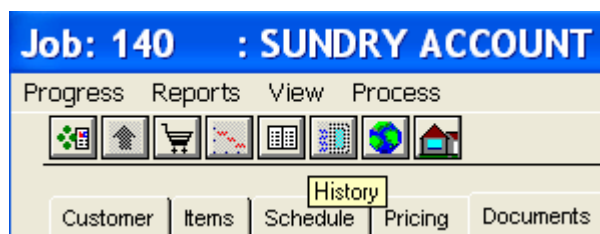
## How to update\track job history

---

Use history to add, view, edit and/or delete the history records corresponding to the current job. These can be accessed via the Windowmaker database. The Supervisor can edit or delete records. The records are removed when a Job is deleted.

To add a history record

- Click on History button and then add a new record.



- Select categories for a new record:
  - General
  - Enquiry
  - Information
- Below are the categories assigned by the program when:
  - Status Changed
  - Invoice Printed
  - Report Output generated
- Add description for activity. Click Ok and history is saved into database now.
- The following details are displayed in the caption of the dialog:
  - Job Number
  - Name of the User who created the record.
  - Date when the record was created.
  - Name of the User who modified the record.
  - Date when the record was last modified.

## How to Backup & Restore Windowmaker Data & Database

Backing up your files provides assurance that you will be able to restore your work should the original data be lost. It is strongly recommended that you backup your Windowmaker data and database at regular intervals and before an upgrade.

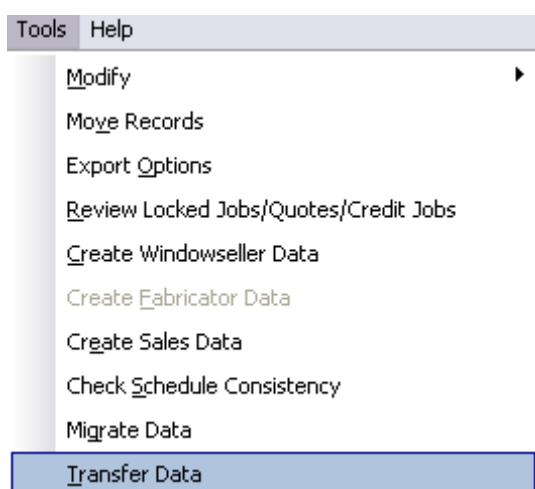
Here is a step-by-step procedure of how to backup and restore your Windowmaker data\database.

**Please note, to complete a full Windowmaker backup you must backup both the data and the database.**

### How to backup your Windowmaker data

**Caution:** Please ensure that all users are logged out of Windowmaker before backing up.

- Run Windowmaker.
  - Go to the Tools menu and click on 'Transfer Data'.
- Please Note: To run this process the user should have 'Read' & 'Change' access rights on the directory of Microsoft SQL Server in which the database resides.



- A sub-directory will be created in the data directory using the current date in the DDMMYYYY format. E.g. If your data directory is D:\DATA and the current date is 10th March, 2009, the subdirectory created will be '10032009'
- After all the relevant data is copied, a 'Transfer Complete' message will be displayed and a copy of the data and the database (WMTRANSFER.MDF) will be created in the above sub-directory
- Your backup is ready. It is recommended that you move this folder to a different location and compact it by using either of the following methods:
  - Compress the directory by right-clicking and using any compatible tool. E.g. WinZip
  - Compress the directory by right-clicking and selecting 'Send To / Compressed (zipped) Folder' (if the Operating System being used is Microsoft Windows XP)
- If you are sending data to Windowmaker for testing or analysis, using just the WMTRANSFER file is ideal, without needing to send a fully copy of the Windowmaker database.

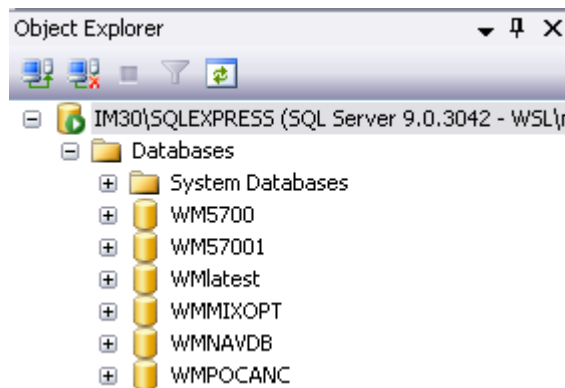
### How to backup your Windowmaker database

To create a copy of the Windowmaker database, you need to first find out the SQL Server instance name and the name of the Windowmaker database. To do this,

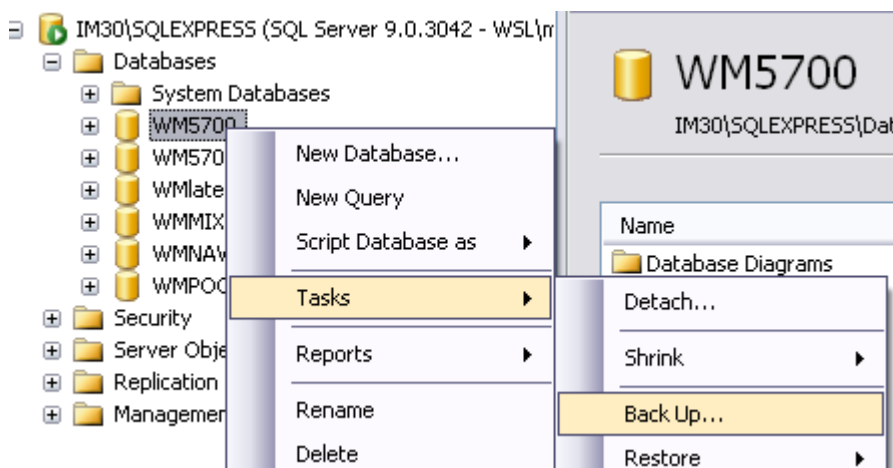
- Locate the Windowmaker data directory by right-clicking 'Windowmaker' icon on the desktop and selecting 'Properties'. The 'Start in' field on the 'Shortcut' page shows the location of the data directory
- Open Windows Explorer and browse to the location and look for the 'DMS.CFG' file.
- Open the DMS.CFG file in 'Notepad' (right click on the file, select 'Open with' and choose Notepad) and make a note of the server and database names.

Please Note: The following steps need to be performed on the server where the SQL Server is located, performed by a user with Administrator rights

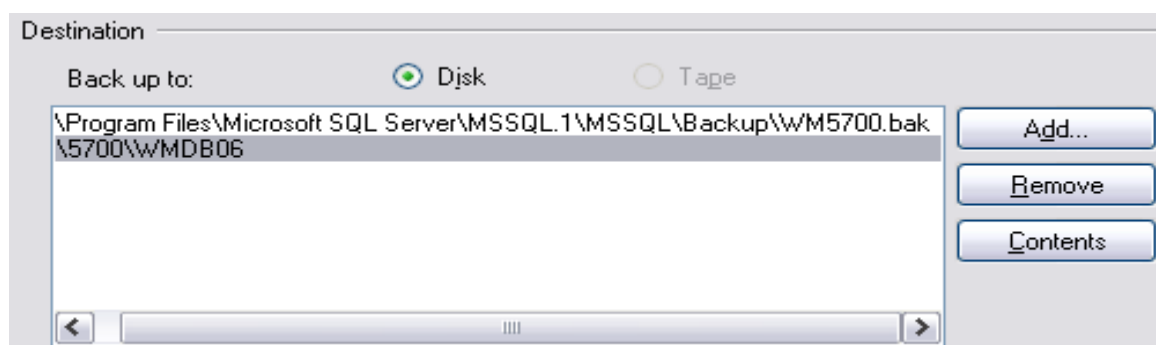
- Go to Start / Programs / Microsoft SQL Server 2005 / Microsoft SQL Server Management Studio Express (if Windowmaker Express).
- In the 'Connect to Server' dialogue, enter the following details:
  - Server Type – Database Engine
  - Server Name – Name of the Server on which the database resides (as noted above)
  - Authentication – SQL Server Authentication to connect through an SQL server account.  
E.g. SUPERVISOR login details provided by Windowmaker.
- Click 'Connect'.
- From the Object Explorer, expand the 'Databases' group.



- Right click on the Windowmaker database (E.g. WM5700) as noted down from DMS.CFG.
- Select Tasks and open the 'Back Up...' dialogue box



- In the 'Destination' section, add the path where a copy of the files will be saved (e.g. C:\WMDB06.BAK).
- Please note: By default a file is added to the 'Back up to' list. Remove the default file and add a new file at the required destination



- Click 'OK' to create a copy of your Windowmaker database in the Destination directory. (C:\WMDB06.BAK).

## How to restore the backed up data

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Please note - To restore both the database and the data, ensure that you first restore the database and then the data.

- Copy the backed up data:
  - The same directory as before, if you are restoring a live version (e.g. after corruption)
  - A new directory (e.g. if you are restoring a backup for testing purposes)
- Open the DMS.CFG file from the directory
- Change the name of 'DATABASE' to:
  - The existing Windowmaker database name, or
  - The one restored above (e.g. WM56TT) if the data needs to be attached to the backed up database.
- Run Windowmaker and test the restored data.

## How to restore a specific part of data

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To restore only a specific module to the live Windowmaker data:

- Go to the backed up WMTRANSFER file in the backup directory
- Open the 'Module' sub-directory
- Copy the required module (say D) using Ctrl+C
- Paste this to the current Windowmaker data directory where the module needs to be replaced, using Ctrl+V.
- Now run Windowmaker and test the changes.

## How to update Windowmaker dongle

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The object of this exercise is to update your dongle with new license file for LidcoMaker.

To update the dongle with this license file please follow the steps below:-

1. Right click on Windowmaker icon on your desktop and click on Properties.
2. Note the path mentioned in 'Start in' which points to the Windowmaker data folder on the computer.
3. Open the data folder (E.g. C:\WM5\Lidco).
4. Copy/Detach the license file ←LID0\*\*\*\*.LIC→ in data folder.
5. Run Windowmaker and program will automatically find new license file.
6. It will ask for updating Dongle. Press 'OK'.
7. Dongle is updated successfully.
8. With the new license file the expiry date will also be extended to one month.

Please note Windowmaker license always comes with one month expiry date. At the beginning of month Windowmaker support team will email new license file to authorized email id. If you do not receive new license file then please contact Windowmaker partner **Fenestration Solutions Australia Pty Ltd** in Australia at **PO Box 322, Patterson Lakes, VIC Australia, 3197**

Or

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Founded in Australia over 65 years ago Lidco is a leading designer and supplier of contemporary and high performance residential and commercial aluminium window and door systems.

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