



Satellite User Guide

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| Section | Title | Page |
|---------|--|------|
| 1 | <u>Starting Satellite</u> | 3 |
| 2 | <u>Processing (Basics)</u> | |
| 2.1 | <u>Quotes and Order Processing</u> | 4 |
| 2.2 | <u>Creating a New Job/Opening Existing</u> | 5 |
| 2.3 | <u>Editing Job</u> | 7 |
| 2.4 | <u>Error Messages</u> | 15 |
| 3 | <u>Processing (Advanced)</u> | |
| 3.1 | <u>Horizontal Couple/Multi-Segment</u> | 17 |
| 3.2 | <u>Welded Cills</u> | 22 |
| 3.3 | <u>Creating Bays or Bows</u> | 26 |
| 3.4 | <u>Adding Additional Items</u> | 30 |
| 3.5 | <u>Adding Additional Glass</u> | 33 |
| 3.6 | <u>Setting Up Discounts</u> | 35 |
| 4 | <u>Printing Documents/Reports</u> | 39 |
| 5 | <u>3rd Party Glass Supplier Setup</u> | 42 |
| 6 | <u>3rd Party Panel Supplier Setup</u> | 46 |
| 7 | <u>Pricing</u> | 50 |
| 8 | <u>Transferring Quotes to Orders</u> | 53 |

Section 1: Starting Satellite

After you have logged onto the system you will see this screen.



Please give the software around 20 seconds to load up, the progress bar at the bottom will disappear when finished

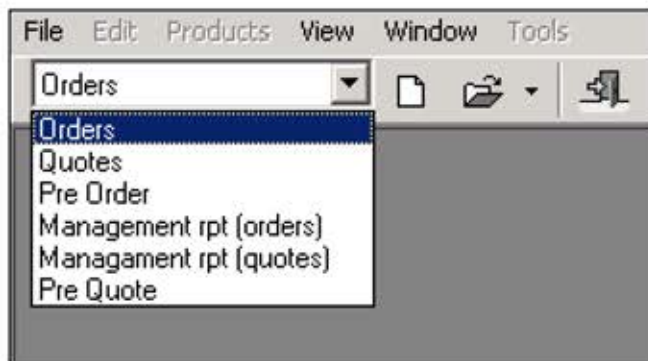
Section 2: Processing (Basics)

Section 2.1: Quote and Order Processing

After the software has loaded, to create a new or view existing quotes or orders, continue by selecting the **Process** option.



Select either **Quotes** or **Orders** from the drop down box.



If you have clicked the **open job** icon then a job list will appear as seen below, these jobs can be opened with a double click of the mouse, or highlight them with a single click.

| Job No. | Customer Name | Job Reference | Date Created |
|---------|------------------|---------------|--------------|
| 1003 | TEST UN-WITH PAN | TEST | 16/03/2014 |
| 1004 | TEST GL-WITH PAN | TEST | 16/03/2014 |
| 1005 | TEST GL-WITH PAN | TEST | 16/03/2014 |
| 1006 | TEST UN-WITH PAN | TEST | 25/03/2014 |
| 1007 | RETAIL #1 | test | 25/03/2014 |
| 1008 | | | 28/03/2014 |
| 1009 | CUSTOMER NAME | REFERENCE | 10/04/2014 |
| 1010 | CUSTOMER NAME | REFERENCE | 10/04/2014 |
| 1013 | Jake | reference1 | 10/04/2014 |

You can click on any of the bars within the list of orders to select that order.

Please note – if you have not previously created any jobs this list will be empty!

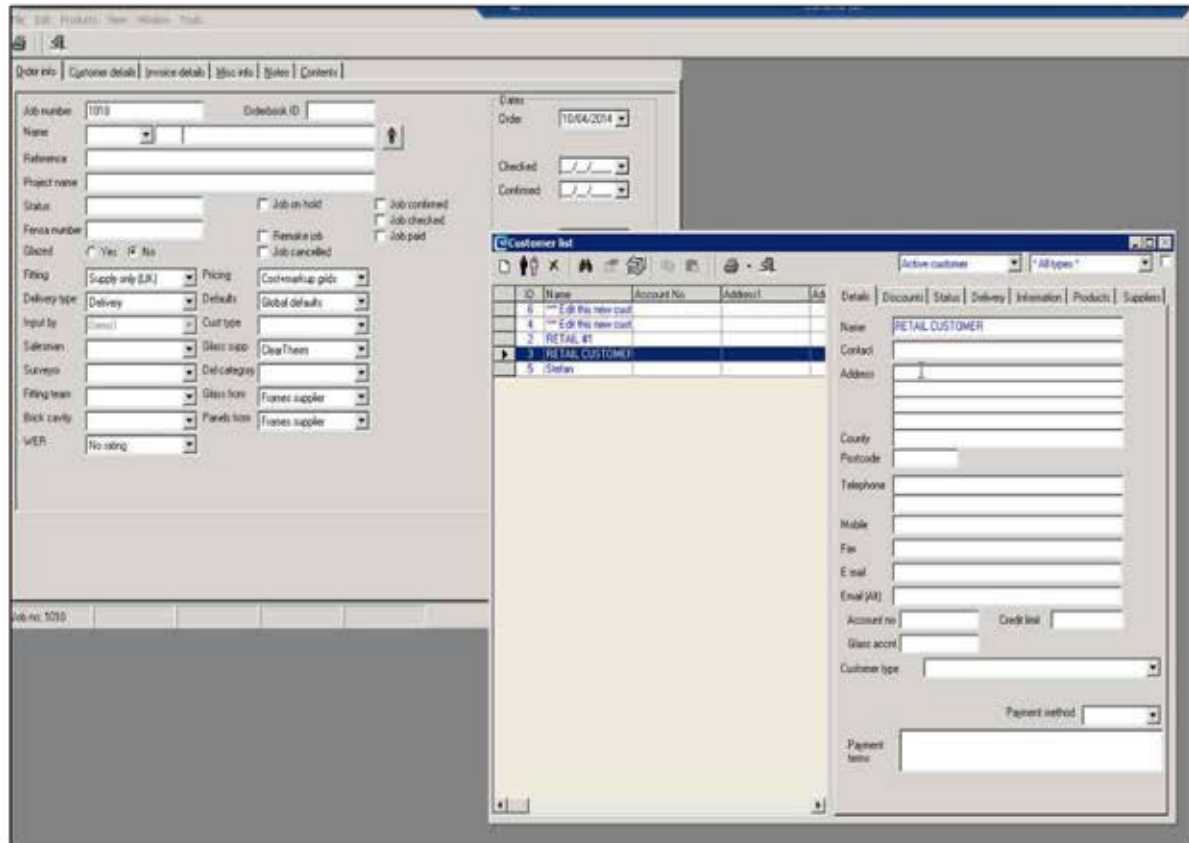
See below list of icons that are shown along the top row, along with a description of what they do:

- | | |
|--|--|
| Create a new order or quote (job) | Pass the highlighted job to TruFrame as an order |
| Open the highlighted job | Search for a job with a specific key term |
| Delete the highlighted job | Sort list accordingly to column that is selected |
| Print a report for the highlighted job | Filter out the current list with certain options |
| Copy job or convert from quote to an order | Use this button to exit and go back one level |

Remember the job highlighted will be the job that is effected from what option you choose from the tool bar.

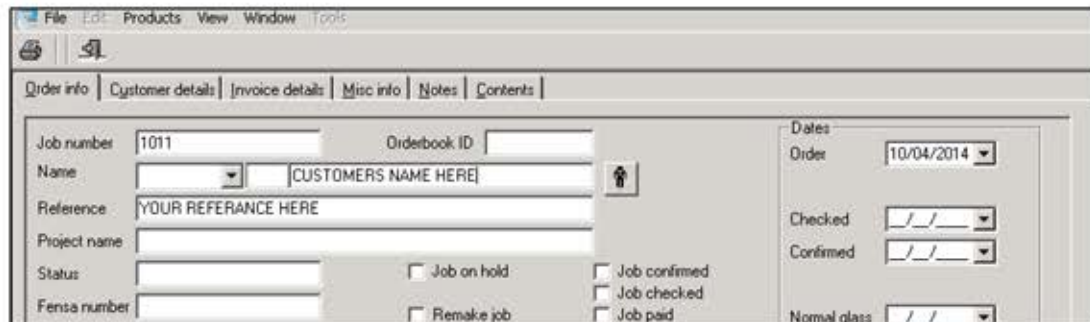
Section 2.2: Creating a new job or opening an existing job

When creating a new job, you will be asked to select an account from the **Customer list**. You can create individual accounts for regular customers or instead use a template account for one-off business.



To create a new customer, simply click the  icon. If you would like to select an existing customer, double click the row they appear on.

If you selected a 'template' customer, overwrite the text written in the field labelled **Name** and enter in the customer's actual name. The software requires you to input a job reference which can be anything you like.



Please note – the **Job number** and **Name** fields will become the job reference for any order that is submitted through RemoteSatellite.








Select if you would like this Job to be glazed or unglazed

Select who is supplying the glass and panels, either **Frames supplier** or **3rd party supplier**


Please note – if you set Glass from to **3rd party supplier** and place your order using RemoteSatellite, your order will be supplied unglazed.

To add frames to the job, select the **Contents** tab at the top of the page.

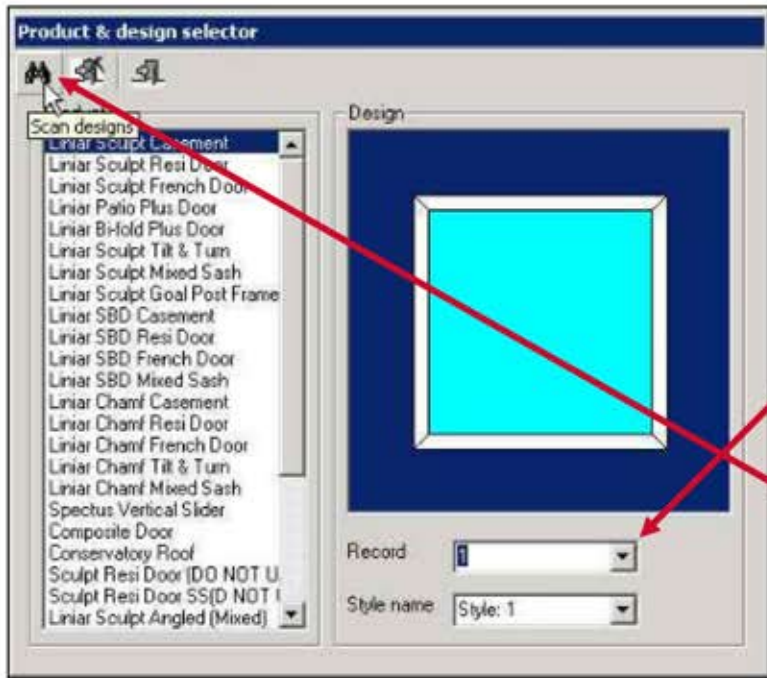
All the buttons alongside this one have different functions, see below and explanation of each:

-  Add a new product
-  Delete the selected item
-  Add extra items to order
-  Edit the selected item
-  Copy the selected item
-  Add loose glass or pane
-  Display list prices on job
-  Paste item from clipboard

To create a new item, select the  button. A new drop down box will appear; choose **Product**.

-  Product
- Bay or bow
- Horizontal coupled
- Welded cill
- Freeform

The following dialogue box will appear:



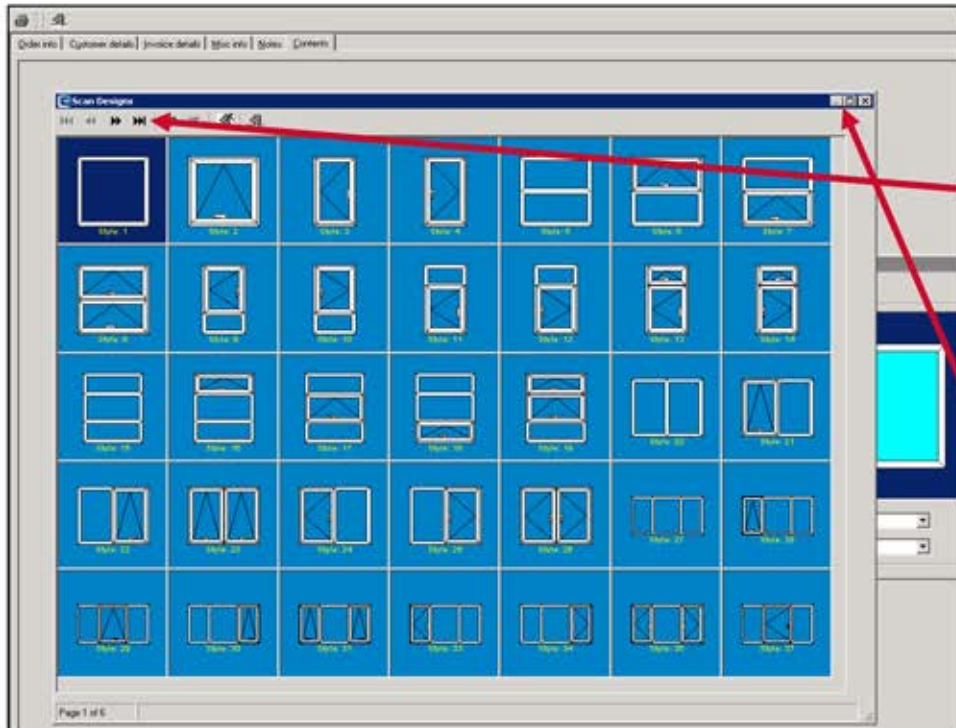
First choose the type of product you would like to input, then select or type in the **Record** number or **Style name** into the appropriate drop down box.



If you don't know the **Record** number or **Style name**, choose the binoculars tool to view the entire product style sheet.



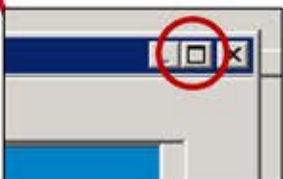
The style sheet displays all available styles for the product, there are many styles to choose from and, although you cannot create your own, you can usually manipulate one to meet your requirements.



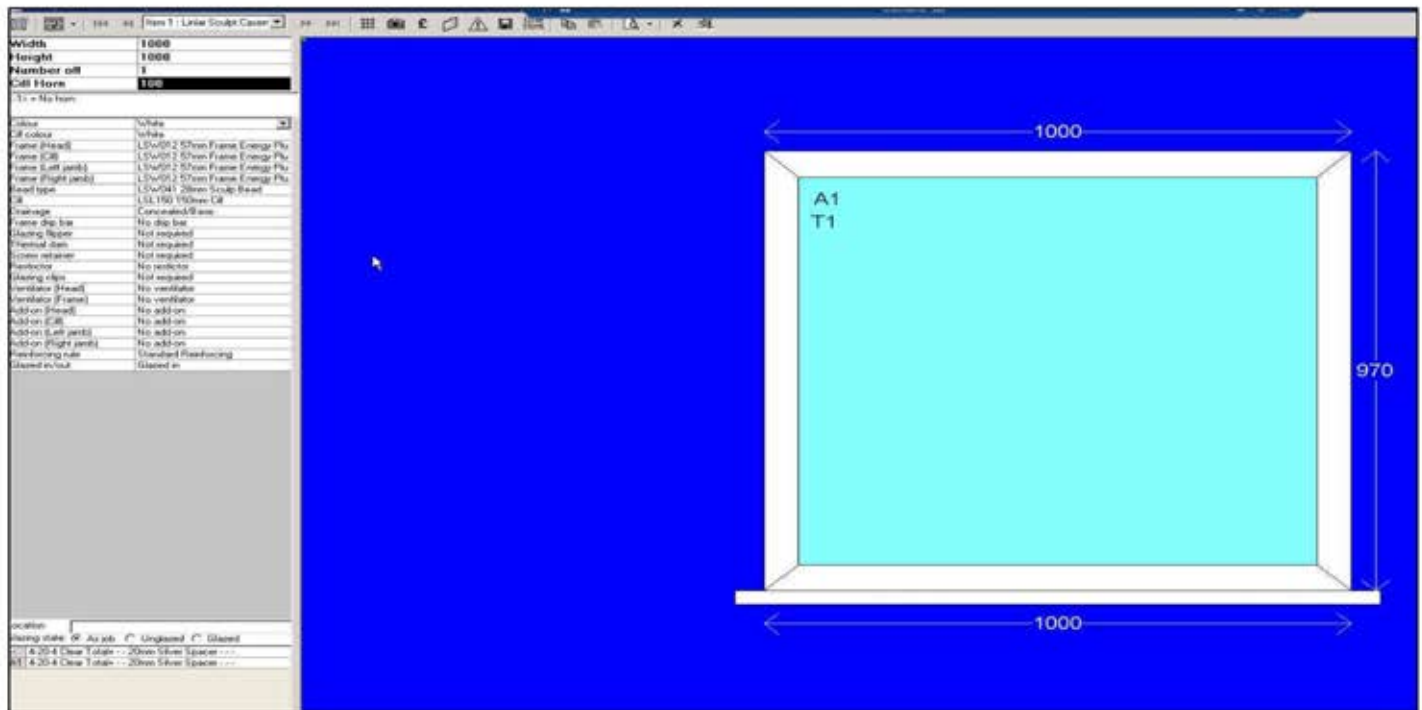
Use the 'Next page' button to scroll through all the designs



Use the maximize button to make the page full screen, meaning you can get more designs in one page.



After selecting the style (single click) the following screen will appear:



Now enter the product dimensions i.e. width, height, mullion centre, transom drop etc.

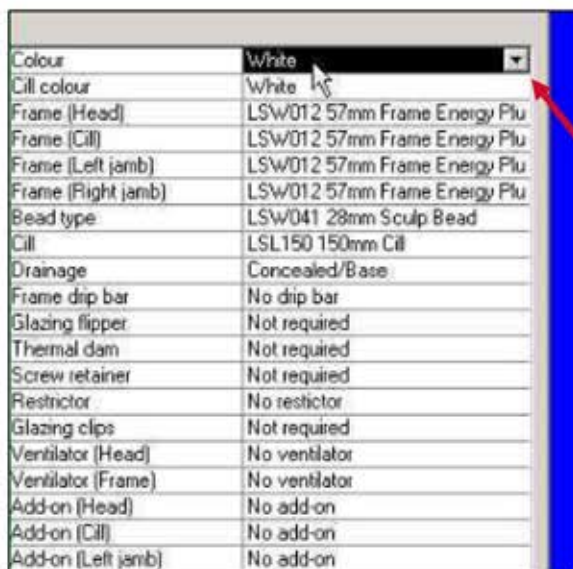
| | |
|-------------------|-------------|
| Width | 1000 |
| Height | 1000 |
| Number off | 1 |
| Cill Horn | 500 |

The Dimensions are the overall sizes, actual frame size will vary depending on cill types, add-ons selected.

Type each dimension and press Enter on your keyboard to move to the next box

Please note – this is the first thing you should do after selecting the style!

After setting the dimensions, set the frame options from the option list (below, left), use the up/down arrow and enter key, or click on an option heading, to view the option choices.



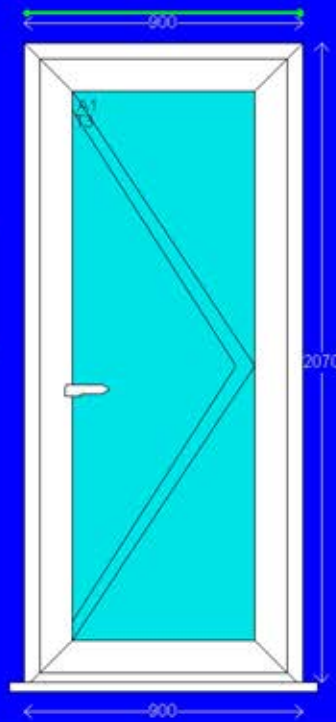
This is an example of the option choices. When you click on the word **White** in the picture on the left. It will bring up all the available frame colours for this product type.



If you are creating a door product, you may wish to change the threshold. You can find the **Threshold** option heading on the option list as seen below.

| | |
|-----------------------|--------------------------------|
| To "WER rating" specs | No rating |
| Open in/out | Open in |
| Colour | White |
| Sash colour | White |
| Cill colour | White |
| Frame (Head) | LSW017 77mm Frame Energy Plus |
| Frame (Cill) | LSW011 57mm uPVC Low Threshold |
| Frame (Left jamb) | LSW017 77mm Frame Energy Plus |
| Frame (Right jamb) | LSW017 77mm Frame Energy Plus |
| Threshold | No threshold |
| Threshold tray | No |
| Bead type | LSW041 28mm Sculp Bead |
| Cill | LSL150 150mm Cill |
| Drainage | Concealed/Gate |
| Frame drip bar | No drip bar |
| Sash drip bar | LANT05 Cill Drip |
| Glazing flippers | Not required |
| Thermal dam | Not required |
| Screw retainers | Not required |
| Restrictor | No restrictor |
| Handle | White Lev/Lev Handle |
| Cylinder | Nickel Cylinder |
| Door lock | 3 Clear Door Lock |
| Door hinge | White Flag Hinges |
| Door hinge quantity | 3 hinges |
| Glazing clips | Not required |
| Ventilator (Head) | No ventilator |
| Ventilator (Sash) | No ventilator |
| Ventilator (Frame) | No ventilator |
| Addon (Head) | No addon |
| Addon (Cill) | No addon |
| Addon (Left jamb) | No addon |
| Addon (Right jamb) | No addon |
| Reinforcing rule | Standard Reinforcing |
| Glazed in/out | Glazed in |

| | |
|----------------|------------------------|
| Threshold | No threshold |
| Threshold tray | No |
| Bead type | LSW041 28mm Sculp Bead |



There are many different options available for the threshold, but if you require a low uPVC threshold, you need to select, **No threshold** under the **Threshold** option...

| |
|----------------|
| Threshold |
| Threshold tray |
| Bead type |

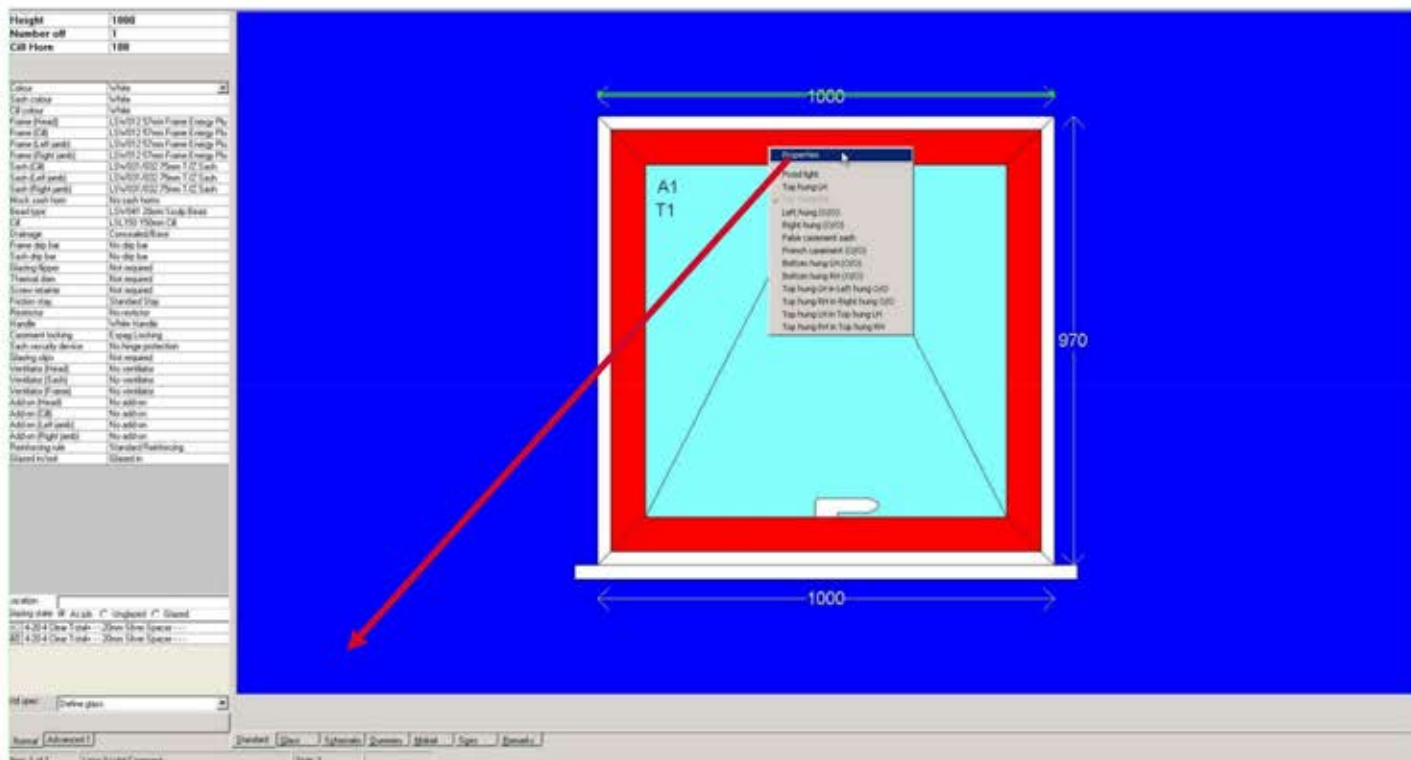
| |
|----------------------------|
| No threshold |
| Goalpost frame, not milled |
| Goalpost frame, sash -50mm |
| Goalpost frame, sash -25mm |
| Goalpost frame, sash -20mm |
| Goalpost frame, sash -10mm |

...then select the option heading labelled **Frame (Cill)** and in the list of options will be **57mm uPVC Low Threshold**.

| |
|--------------------|
| Frame (Head) |
| Frame (Cill) |
| Frame (Left jamb) |
| Frame (Right jamb) |

| |
|---------------------------------------|
| LSW017 77mm Frame Energy Plus |
| LSW011 57mm uPVC Low Threshold |
| LSW026/027 87mm Odd Leg Outer |

Options and aperture types can be changed using the frame drawing. On the drawing, right click on the sash or fixed light then select properties from the pop-up menu. The option list on the left of the screen will then show options that are only applicable for selected aperture. The pop-up menu will also allow you to change the sash type or from a sash to fixed light or vice-versa. As seen below, the highlighted area (sash) is the area that would be separately changed.



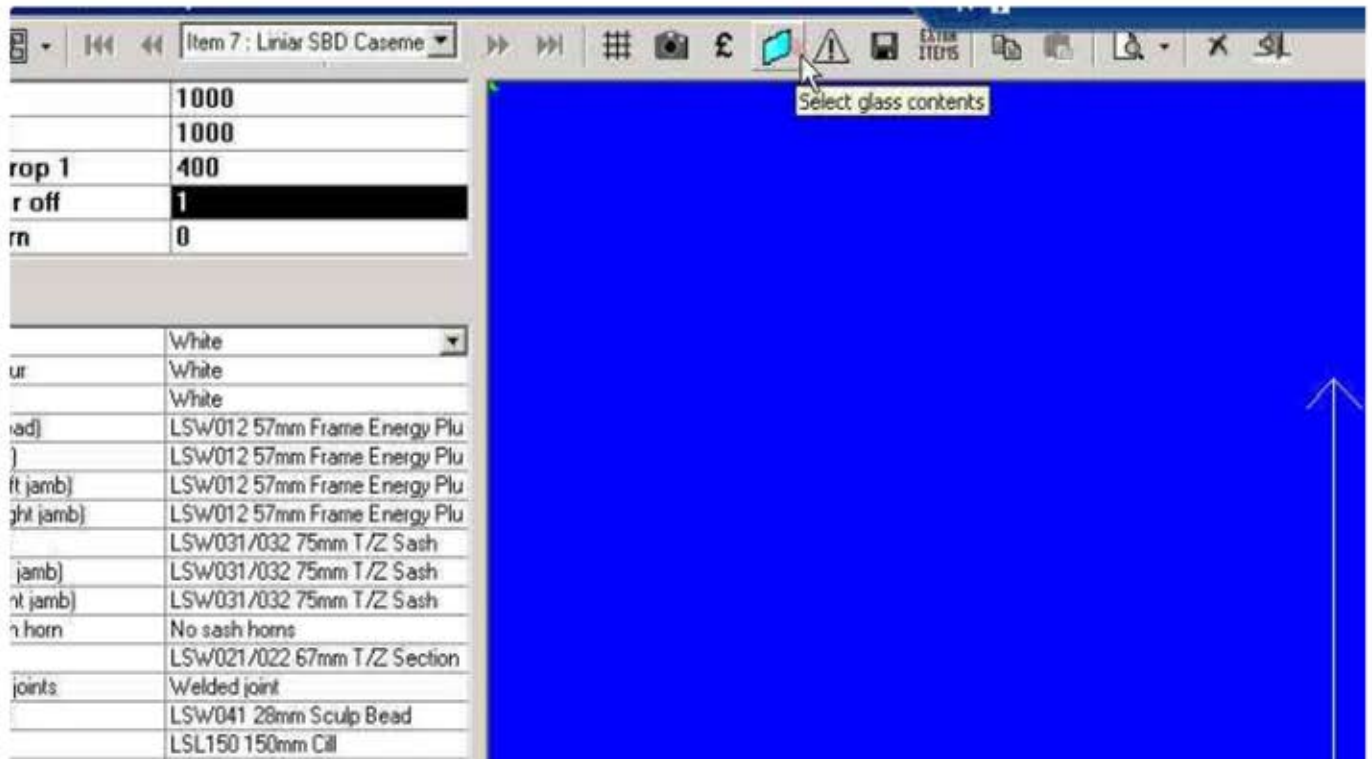
| Properties | |
|-------------------------------|--|
| Fixed light | |
| Top hung LH | |
| ✓ Top hung RH | |
| Left hung (O/O) | |
| Right hung (O/O) | |
| False casement sash | |
| French casement (O/O) | |
| Bottom hung LH (O/O) | |
| Bottom hung RH (O/O) | |
| Top hung LH in Left hung O/O | |
| Top hung RH in Right hung O/O | |
| Top hung LH in Top hung LH | |
| Top hung RH in Top hung RH | |

| | |
|----------------------|--------------------------|
| Sash colour | White |
| Sash (Cill) | LSW031/032 75mm T/Z Sash |
| Sash (Left jamb) | LSW031/032 75mm T/Z Sash |
| Sash (Right jamb) | LSW031/032 75mm T/Z Sash |
| Mock sash horn | No sash horns |
| Bead type | LSW041 28mm Sculpt Bead |
| Frame drip bar | No drip bar |
| Sash drip bar | No drip bar |
| Friction stay | Standard Stay |
| Restrictor | No restrictor |
| Handle | White Handle |
| Casement locking | Espag Locking |
| Sash security device | No hinge protection |
| Ventilator (Sash) | No ventilator |
| Ventilator (Frame) | No ventilator |
| Sash bottom joint | Mitre |
| Glazed in/out | Glazed in |

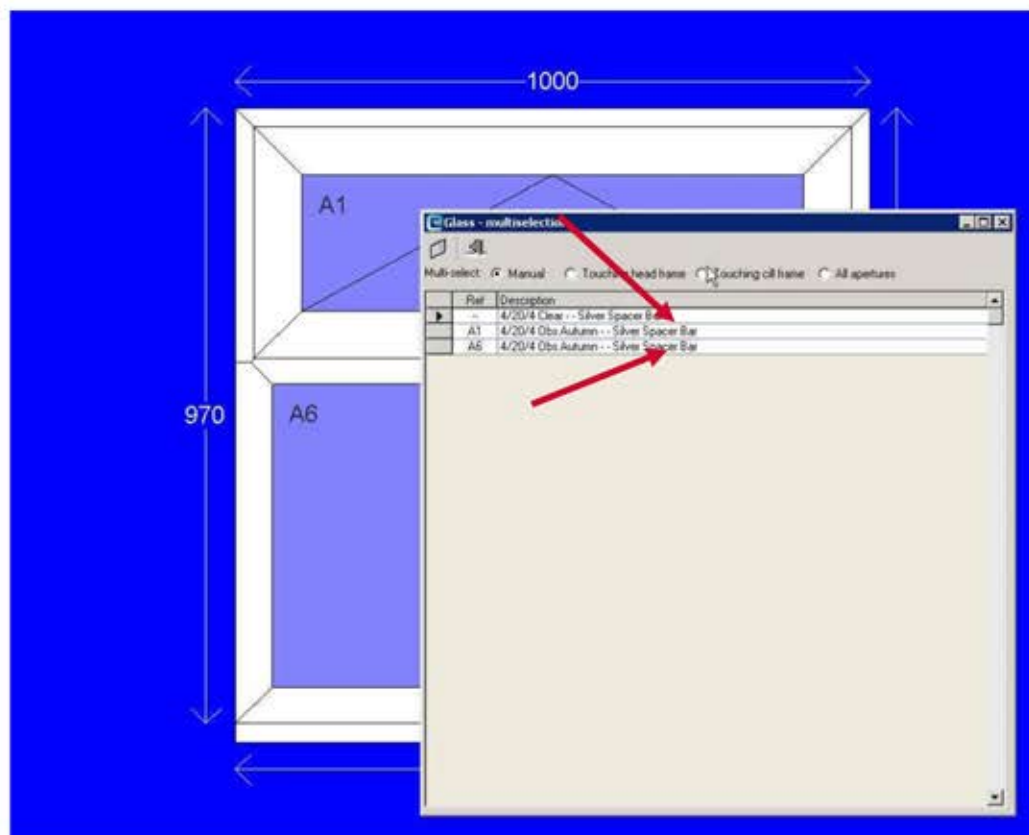
Option heading text colours change after a selection. If blue the option choice is different to the system default and red if changed using the right click method (above).

Glazing Options

To set the glazing options from the Product Options screen, click on 'select glass contents' to get started



The glazing list will appear allowing you to edit each aperture either singly or as a group. Aperture (A1) on the frame drawing corresponds to that shown against each line in the glazing list (below).

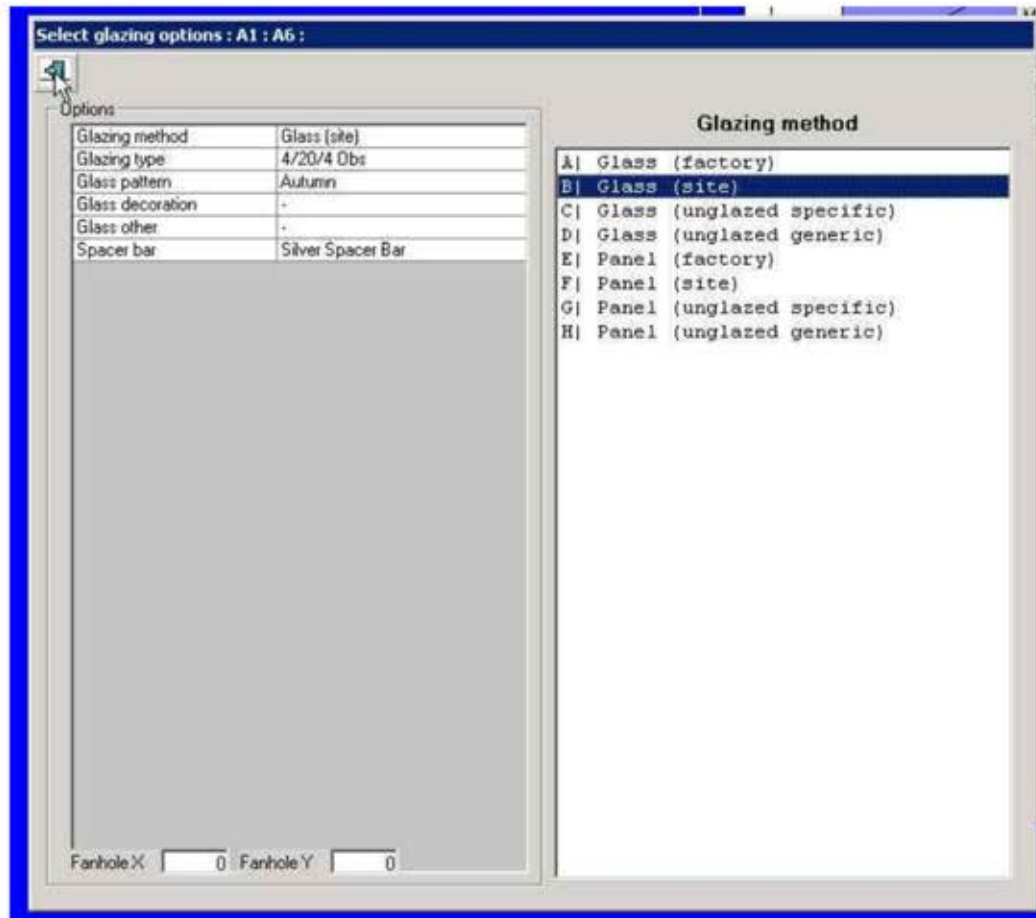


At the top of the glazing list select either 'Manual', 'Touching Head Frame', 'Touching Cill Frame' or 'All Apertures', this will highlight (select) the lines you wish to edit.



Then click on  in the top left hand corner. Selection of glazing apertures in this manner allows for different glass types to be mixed within the same frame i.e. in certain situations the lower panes may require safety glass.

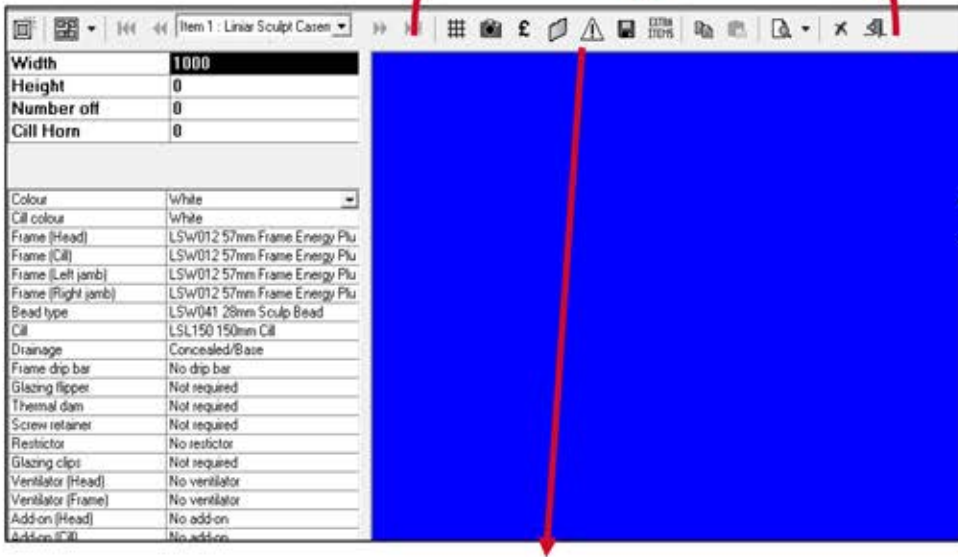
The following form will appear (below), clicking on any of the lines in the left panel will display the option choices in the right panel. Under glazing method always select either 'Glass (site)' or 'Panel (site)', move through each option on the left until the desired options are set.




Press the 'exit' button (top left) then wait for the programme to change the glass descriptions, then press exit again to return to the frame item.


Toolbar


Below are other option available from the tool bar.




 -Edit Georgian bars and square leads

 -Copy selected remarks

 ...-Save the products defaults

 -Select the contents of the glass


 -Add additional items to the job


 -Quick switch items on job


 -Change/ scan designs


 -Paste selected remarks


 -Show images from local folder

 -Create a new product

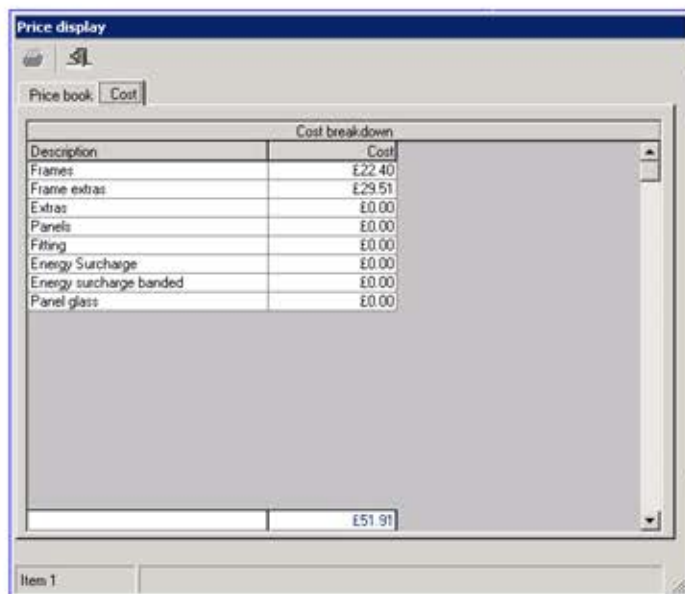
 -Preview the work order

 -Delete item from job

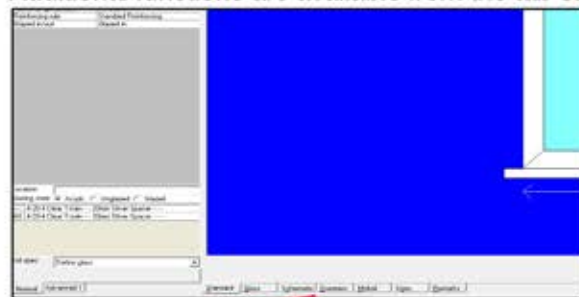
 -Show the error log for this item

 Show a breakdown of the price

To view the frame costs press the £ button on the tool bar, this provides a cost breakdown of the frame and all additional items, all costs are net and take into account discount agreed



Additional functions are available from the tab strip at the bottom of the frame drawing.



Standard Always return to this after using any of the other tab options

Glass Define different glass options using this button

Dummies Add/remove dummy mullions and transoms

Schematic Displays the glass as a schematic layout.

Sizes A better layout of size input options

Midrail Add midrail and vertical rails to the frame

When finished setting the frame and glazing options completed the item using the 'exit' item, this will take you back to the 'contents' view.

Use this exit button to return to the contents view

| | |
|-----------|------|
| Width | 1000 |
| Height | 1000 |
| Number of | 1 |
| Call Horn | 100 |

| | |
|---------------------|-------------------------------|
| Colour | White |
| Call colour | White |
| Frame Head | LSU012 50mm Frame Energy Plus |
| Frame Sill | LSU012 50mm Frame Energy Plus |
| Frame Left jamb | LSU012 50mm Frame Energy Plus |
| Frame Right jamb | LSU012 50mm Frame Energy Plus |
| Head type | LSU041 20mm Scrap Head |
| Call | LSL150 150mm Call |
| Drainage | Concealed/Glaze |
| Frame dip bar | No dip bar |
| Glazing System | Not required |
| Thermal dam | Not required |
| Screen release | Not required |
| Reflector | No reflector |
| Glazing clips | Not required |
| Ventilator (Head) | No ventilator |
| Ventilator (Frame) | No ventilator |
| Add-on (Head) | No add-on |
| Add-on (Call) | No add-on |
| Add-on (Left jamb) | No add-on |
| Add-on (Right jamb) | No add-on |
| Reinforcing tube | Standard Reinforcing |
| Glazed in/out | Glazed in |

Location: _____

Glazing state: As job Unglazed Glazed

14.204 Clear Total - 20mm Silver Spacer

Section 2.4: Error Messages

Error messages take 2 forms. They are either just Informational or Mandatory.

Informational Error messages are to warn you about something that may be an issue. This could be a non-recommended size or a part with an extended delivery date. Press 'exit' to continue.

Errors found in this job

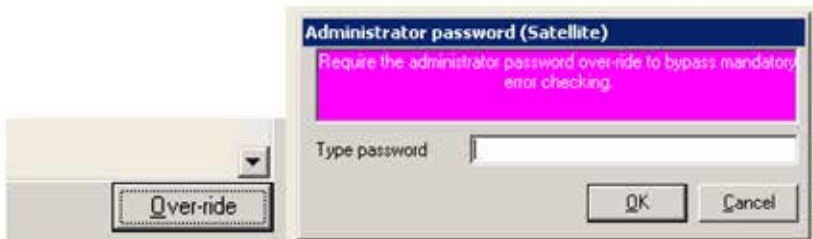
| Item | Error description | Information | Part description | Stock description |
|------|-------------------|-------------|------------------|-------------------|
| 1 | Glass stepped up | Apert A-1 | | |

A mandatory message means that the frame will have to be altered before you can continue further. Press the 'Override' button at the bottom right of the screen, then press 'Cancel', this will take you back to the item allowing you to make the necessary changes.

Please note: These messages are designed to prevent any delay to your order in the manufacturing department.

Errors found in this job

| Item | Error description | Information | Part description | Stock description |
|------|----------------------------|-------------|------------------|-------------------|
| 5 | Sash is below minimum size | Apert A-1 | | |

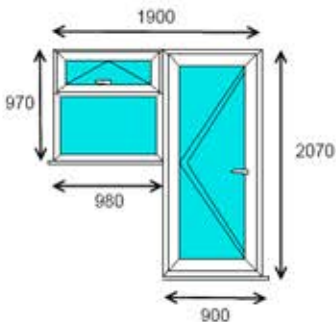


Section 3: Processing Part 2

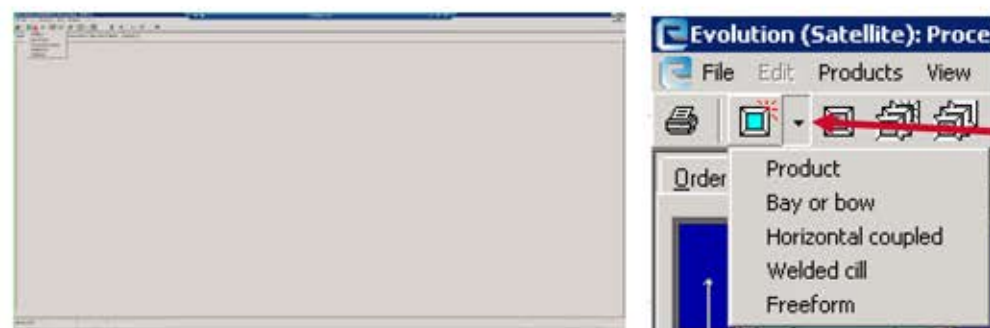
3.1: Horizontal Coupled/Multi-Segment [http](#)

Horizontal coupled are used for flag type windows/doors, or a door with a 'coupled' side panel. As an example, create a multi-segment "flag style" window/door, joined together by a 20mm Coupler, by following this guide.

In the example (below) the overall width is 1900mm, door height is 2100mm and 1050mm (including projecting cill) for the window.



Click the 'add new product to job' drop down button (as below).



Press the drop down arrow next to the button, rather than pressing the button itself.

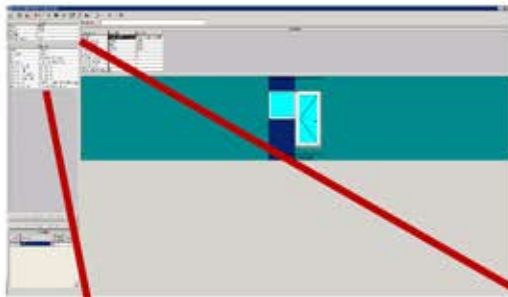
Select 'Horizontal coupled' and then choose the correct multi-segment type from the list.



There are two buttons on this screen. The left hand button will cancel and revert back to the contents screen. The other one will create the selected product


Enter the overall sizes first, the width will be total width of all the separate frames coupled together. The height will be the height of the largest frame including cills or add-ons.

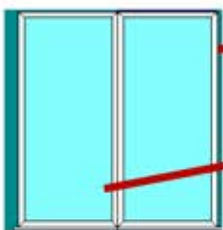
In the example this will be 1900 x 2100.



| Options | |
|---------------------|----------------------|
| Colour | White |
| Cill colour | White |
| Cill | LSL150 150mm Cill |
| Drainage | Concealed/Base |
| Add-on (Head) | No add-on |
| Add-on (Cill) | No add-on |
| Add-on (Left jamb) | No add-on |
| Add-on (Right jamb) | No add-on |
| Coupler ver | LAN103 2.5mm Coupler |
| Reinforcing rule | Standard Reinforcing |

| Sizes | |
|------------------|------|
| Width | 1900 |
| Height | 2100 |
| Quantity | 1 |
| Cill horn length | 100 |

Then select the  'New Product' Button to create segments for the horizontal coupled, one for each separate frame. In this example this is selected twice. Each item will be create as default products, if needed change the product and design by either double clicking on the product name in the column or right clicking on the drawing.



| Description | Item #1 | Item #2 |
|---------------|----------------------|----------------------|
| Product | Liniar Sculpt Caseme | Liniar Sculpt Caseme |
| Width centres | 950 | 950 |
| Overall width | 949 | 949 |

Use the options menu here to set certain options for the whole multi-segment rather than a segment at a time.

When adding in a segment, they will be added as default products, such as Resi Door as shown below. Right click on the product needing to change and select design. This will allow changes to the design and style of the product.

Initially the width for each segment will be divided by the overall width equally. See here that there is a 20mm coupler, reducing 10mm from each frame. The width centre is to the direct centre of the coupler.

| Description | Item #1 | Item #2 |
|----------------------|----------------------|-----------------------|
| Product | Liniar Sculpt Caseme | Liniar Sculpt Resi Dc |
| Width centres | 950 | 950 |
| Overall width | 949 | 949 |
| Overall height | 970 | 2070 |
| Drop from top | 0 | 0 |
| Rise from base | 1100 | 0 |
| Locked centres | | |
| Locked size | | |
| Cill horn (each seg) | 0 | 0 |

In this example, the door width is set to the brickwork opening; the coupler deductions are taken off the width of the window. Enter the door width as the 'Overall width', this will adjust the window width accordingly and set the width of the door to a locked dimension. A locked dimension is simply one that will not be affected by changes made to other dimensions.

Ensure that the correct coupler has been selected.

The two types of widths are; 'Overall width' and 'Width centres'. The overall width is the width of the frame excluding couplers. Width centres is the overall width of the segment including to the centre line of any couplers.

Frame height:- enter the overall height of the frame including cill, but notice the height of the cill will be deducted from the height. In this example the 'Overall height' of the frame was set to '1000' but is showing as '970'.

| Description | Item #1 | Item #2 |
|----------------------|----------------------|-----------------------|
| Product | Linair Sculpt Caseme | Linair Sculpt Resi Dc |
| Width centres | 950 | 950 |
| Overall width | 949 | 949 |
| Overall height | 970 | 2070 |
| Drop from top | 0 | 0 |
| Rise from base | 1100 | 0 |
| Locked centres | | |
| Locked size | | |
| Cill horn (each seg) | 0 | 0 |

If the same cill is required for each segment, set the cill using the parent options (as below). However if a different cill is needed for each segment select 'No Cill' in the parent options, this will change the cill option inside each segment. (Please note, 'No Cill' in the parent type does not remove the cills from the segment completely, it merely allows individual cills to be set. To remove cills, after selecting 'No Cill', select 'No Cill' in each segment.)

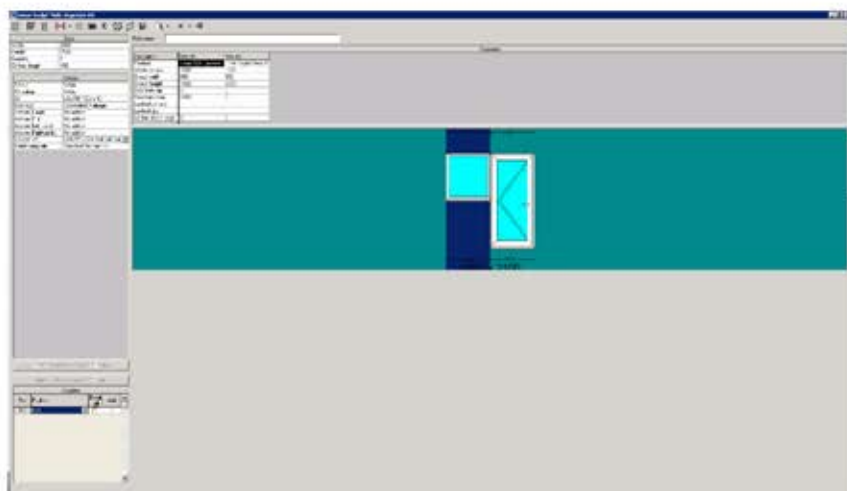
| | | | |
|---------------------|----------------------------|----------------------|-------------------------------|
| Cill horn length | 100 | Product | LSW017 77mm Frame Energy Plus |
| Options | | Width centres | LSW017 77mm Frame Energy Plus |
| Colour | White | Overall width | LSW017 77mm Frame Energy Plus |
| Cill colour | White | Overall height | LSW017 77mm Frame Energy Plus |
| Cill | LSL150 150mm Cill | Drop from top | LSW017 77mm Frame Energy Plus |
| Drainage | Concealed Drainage | Rise from base | No threshold |
| Add-on (Head) | No add-on | Locked centres | Threshold tray |
| Add-on (Cill) | No add-on | Locked size | No |
| Add-on (Left jamb) | No add-on | Cill horn (each seg) | LSW041 28mm Sculp Bead |
| Add-on (Right jamb) | No add-on | | Cill |
| Coupler ver | LAN211 20mm Std Butt Joint | | LSL150 150mm Cill |
| Reinforcing rule | Standard Reinforcing | | Drainage |
| | | | Concealed Drainage |
| | | | Frame drip bar |
| | | | No drip bar |
| | | | Sash drip bar |
| | | | LAN105 Cill Drip |

To have no cill on the multi-segment at all, be sure that 'No cill' has been selected for the product and parent options.

| | |
|--------------------|-------------------------------|
| Colour | White |
| Frame (Head) | LSw012 57mm Frame Energy Plus |
| Frame (Cill) | LSw012 57mm Frame Energy Plus |
| Frame (Left jamb) | LSw012 57mm Frame Energy Plus |
| Frame (Right jamb) | LSw012 57mm Frame Energy Plus |
| Bead type | LSw041 28mm Slip Bead |
| Cill | No cill |
| Drainage | Face Drainage |
| Frame drip bar | No drip bar |
| Glazing flipper | Not required |

| Options | |
|---------------|---------------|
| Colour | White |
| Cill colour | White |
| Cill | No cill |
| Drainage | Face Drainage |
| Add-on (Head) | No add-on |





Here the overall width of each item can be changed to match the requirements.

As shown in the example the overall height of item #1 has been changed.

Doing this it is keeping the overall height of the horizontal coupled, but changing one items height making only that item smaller, creating the flag type effect

Use this box to edit each frame separately and conveniently

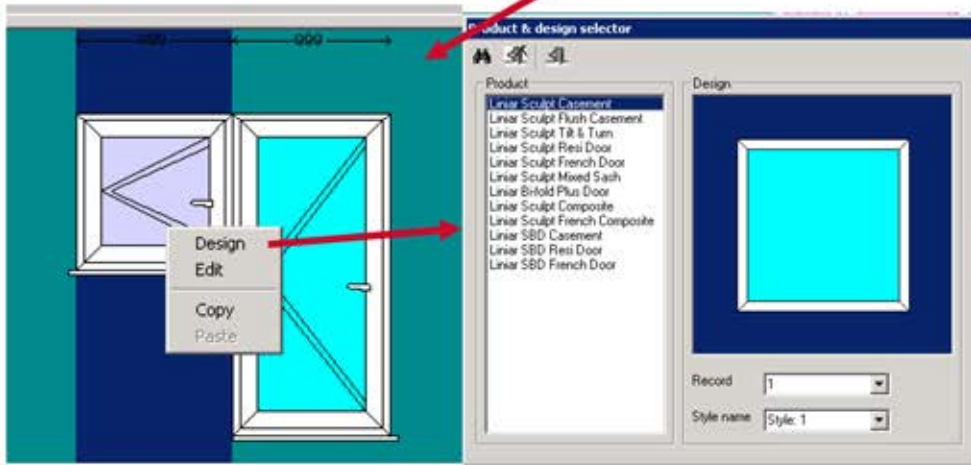
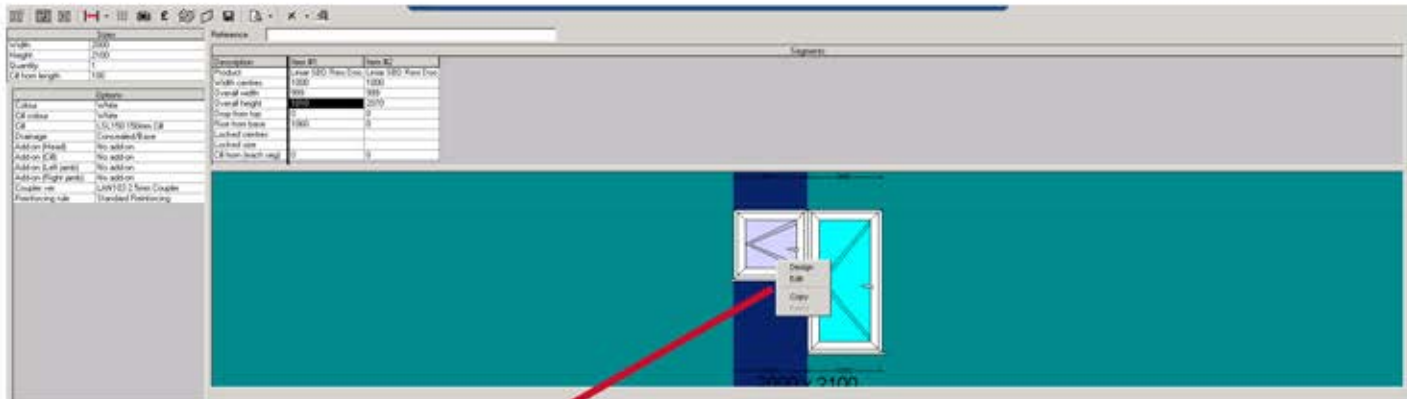
Remember the overall width and height is divided by the amount of segments that are in place

| Sizes | |
|------------------|------|
| Width | 1900 |
| Height | 2100 |
| Quantity | 1 |
| Cill horn length | 100 |

| Description | Item #1 | Item #2 |
|----------------------|----------------------|-----------------------|
| Product | Linair Sculpt Caseme | Linair Sculpt Resi Dc |
| Width centres | 990 | 910 |
| Overall width | 980 | 900 |
| Overall height | 1020 | 2070 |
| Drop from top | 0 | 0 |
| Rise from base | 1050 | 0 |
| Locked centres | | |
| Locked size | | Yes |
| Cill horn (each seg) | 0 | 0 |

| Options | |
|---------------------|----------------------------|
| Colour | White |
| Cill colour | White |
| Cill | LSL150 150mm Cill |
| Drainage | Concealed Drainage |
| Add-on (Head) | No add-on |
| Add-on (Cill) | No add-on |
| Add-on (Left jamb) | No add-on |
| Add-on (Right jamb) | No add-on |
| Coupler ver | LAN211 20mm Std Butt Joint |
| Reinforcing rule | Standard Reinforcing |

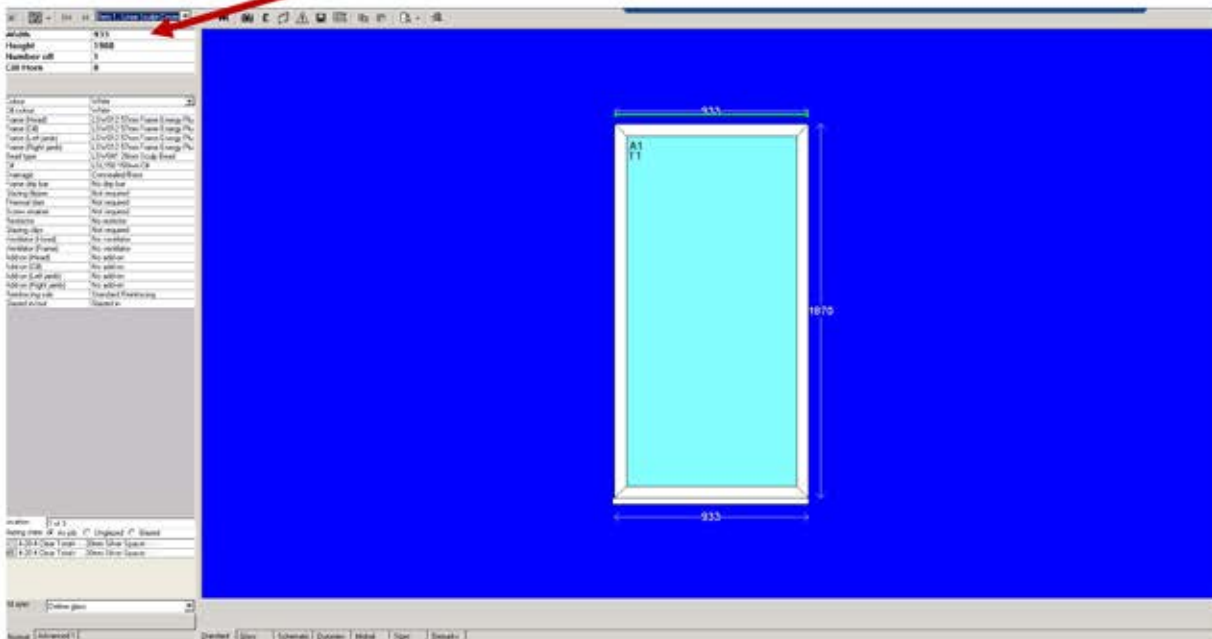
Each separate frame can be edited separately casement, Resi Door or French door.



Or choose to edit the already selected default product.

The next screen is where the options for each item are altered. To revert from this screen just press the 'Exit' button. Remember what is edited on this frame will only apply to this part of the multi-segment.

Please Note; the dimensions are not changeable inside a frame they must be changed in the parent options only.



After finishing editing the frames, press the 'Exit' button to be brought back to this screen.

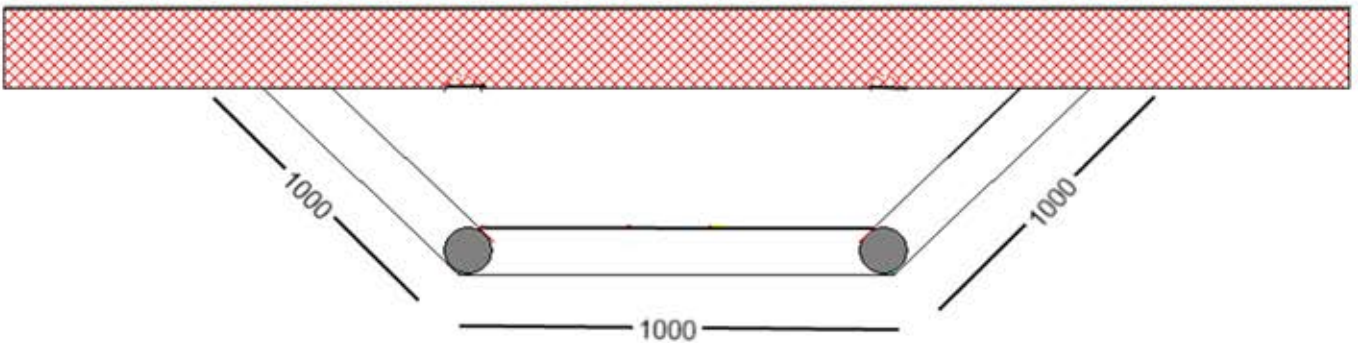
Once back on this screen, create more frames to add to the multi segment.

To edit the multi-segment that already created, select the whole product not a separate frame.

Or press the 'Exit' button to be taken back to the list of orders, where this job can then be processed.

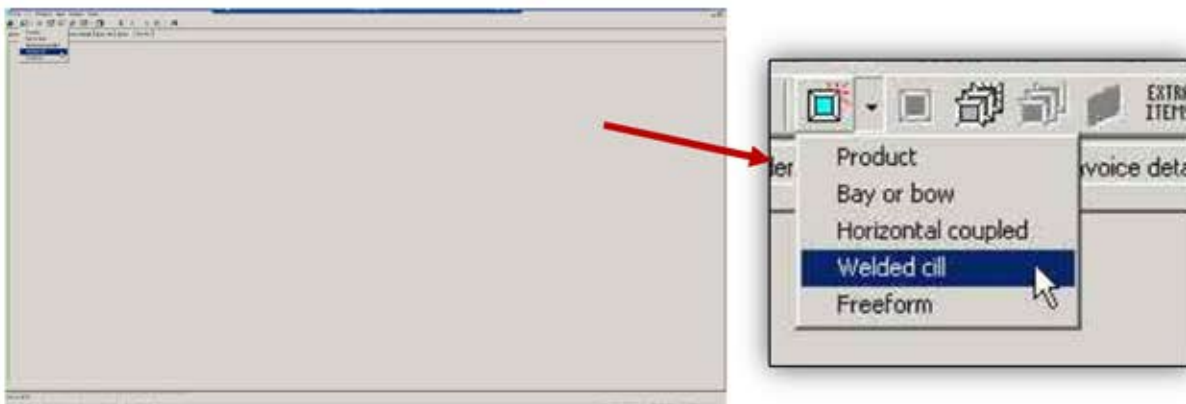
| | | | | | |
|-----------------------------|--------|------------------------|---------|-------------------------|---------|
| Liniar Sculpt Multi-Segment | 1 | Liniar Sculpt Casement | 1 | Liniar Sculpt Resi Door | 1 |
| 1900 x 2100 | £38.19 | 980 x 1020 | £163.77 | 900 x 2070 | £498.03 |
| | | 1 of 2 | | 2 of 2 | |
| Item 2 | | Item 23 | | Item 24 | |

3.2: Welded Cill



In this example, a 3-segment cill will be created.

To create a welded cill Select 'Product' then click on 'Welded cill' to create.



After the welded cill has been selected, a product type needs to be selected.

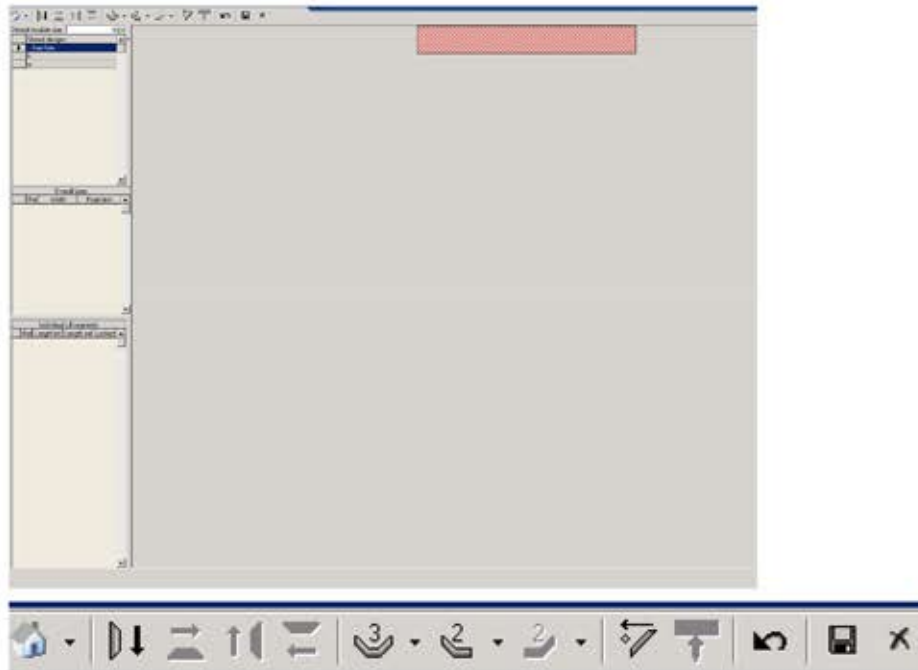
Select the type of cill required then press 'Exit'.













The next step after choosing the design, is adding in the cills.

A red rectangle will be on the first screen, which represents a brick wall on a house, from a Birdseye. Frames will be added accordingly, starting from the left hand side of the brick wall. Add cills to either a default angle or a user defined

angle. If the first cill is not a user defined cill, then input the size required into the small white box as shown below (Default module size). When the size is in place, select the type of cill required, (the first one selected must be coming away from the wall), or select a default 3-7 segment cill (these are all set at certain angles). There is also the option to have a 2-segment cill coming away from the wall at an angle set as default. For a specified angle, select 'User Defined Cill.'

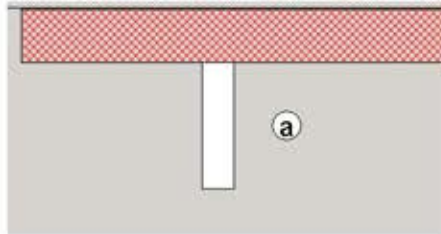


-  -2 segment cill from left
-  -Extend cill to wall
-  -User created cill size and angle
-  -Bring cill up
-  -Undo last made move
-  -Cill goes to the left
-  -Bring cill down
-  -3 segment cill created
-  -Cill goes to the right
-  -Delete item

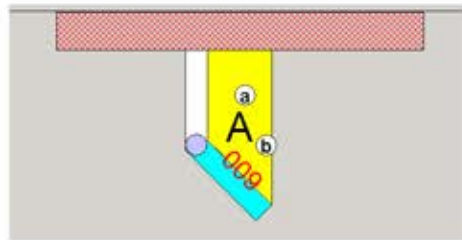
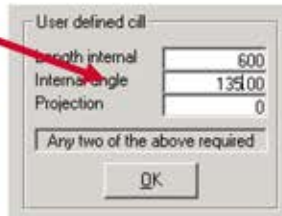


Default module size

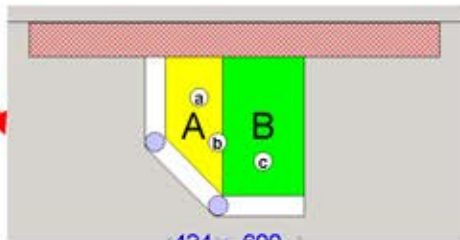
A 5-sided cill will be made here using user defined angles. The first part of the cill will be coming straight from the wall. To do this, use the 'Cill down' option. Make sure to set the size of the cill needed before creating the cill. Do this using the 'Default module size' box. In this example, the first cill will be set to 600mm.



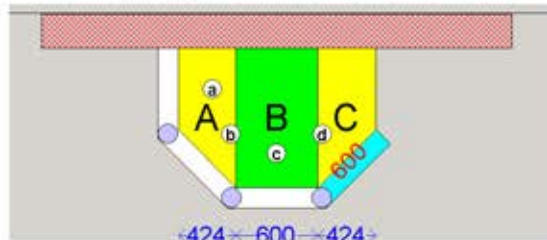
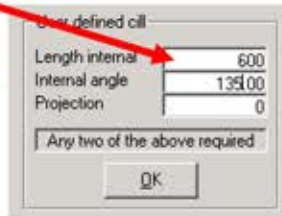
After the first cill has been created, the next part of the cill is going to need a 'Cill user angle'; this will set the internal length and angle relative to the previous cill.



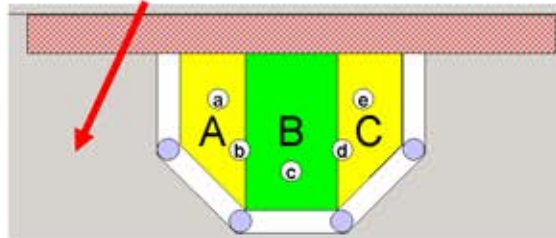
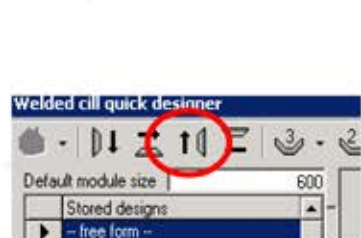
The third part of the cill will be running parallel to the wall. To do this, select 'Cill right' after entering the 'Default module size'. This will create a cill of the selected size running to the right, parallel with the wall.



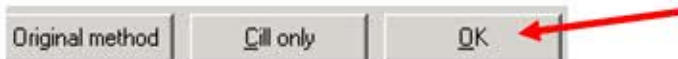
The next part of the cill is another 'Cill user angle'. This time the cill will be going back towards the wall.



The final part of the cill is to push it back to the wall. To do this, again enter the 'Default module size' then select the 'Cill up' button. This will push the cill back to the wall and complete it.



After all of the segments for this cill have been created, select the 'Next' option. If 'OK' is selected the cill will be created along with the frames, but if 'Cill only' is selected, only the welded cill will be created and no frames will be added.



After the required option is selected, the next screen shows a summary of all the frames on the welded cill. Just use the 'Exit' button in the corner to continue on and create the frames.

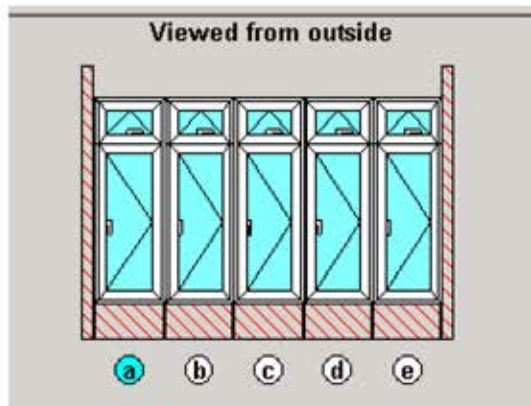
| Segments | | | | | |
|----------|------------|-----|-------|--------------------------|--|
| Ref | Int length | Qty | Width | Locked | |
| a | 600 | 1 | 600 | <input type="checkbox"/> | |
| b | 600 | 1 | 600 | <input type="checkbox"/> | |
| c | 600 | 1 | 600 | <input type="checkbox"/> | |
| d | 600 | 1 | 600 | <input type="checkbox"/> | |
| e | 600 | 1 | 600 | <input type="checkbox"/> | |



The cills should have now been added to the brickwork. A 3-segment cill has been created, each at 1000mm with an angle of 135 degrees.

If one of the separate frames needs editing, just double-click underneath the bottom task bar where the frames are viewed from the outside

Now the product can be altered in the usual way.



Alter the different sizes in the cill on this page. On the top row, the option is there to alter the overall frame height, the overall wall height, the transom drop (if required), the mod size, the roof pitch and the cill horn.

Alter the overall sizes for each individual segment underneath, (this includes the interior and exterior lengths and the wall height underneath each cill). Also, the 'Locked' Option will allow no dimension changes to be made to a cill with this option selected.

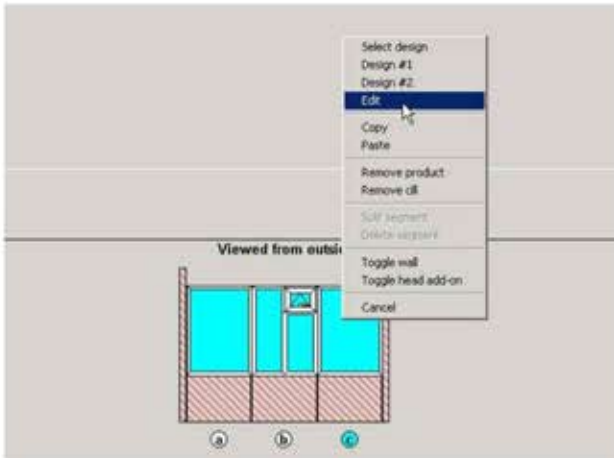
Frame ht
Wall ht
Tran drop
Mod size
Roof pitch
Cill ht

| Overall sizes | | | |
|---------------|-------|------------|-------------|
| Ref | Width | Projection | Roof matrix |
| A | 2414 | 707 | |

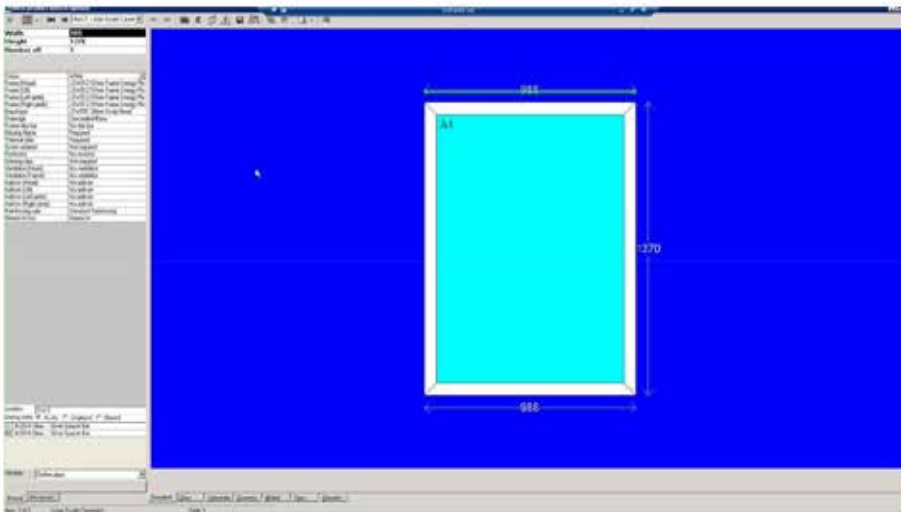
| Individual cill segments | | | | |
|--------------------------|------------|------------|-------------|-------------------------------------|
| Ref | Length int | Length ext | Wall height | Locked |
| a | 1000 | 1212 | 600 | <input checked="" type="checkbox"/> |
| b | 1000 | 1124 | 600 | <input type="checkbox"/> |
| c | 1000 | 1212 | 600 | <input checked="" type="checkbox"/> |

To alter the options on a frame, right-click on the selected frame and select 'Edit', or select 'Design', which will allow a specific style to be selected for this frame.

This will bring up the screen where changes can be made to the product.

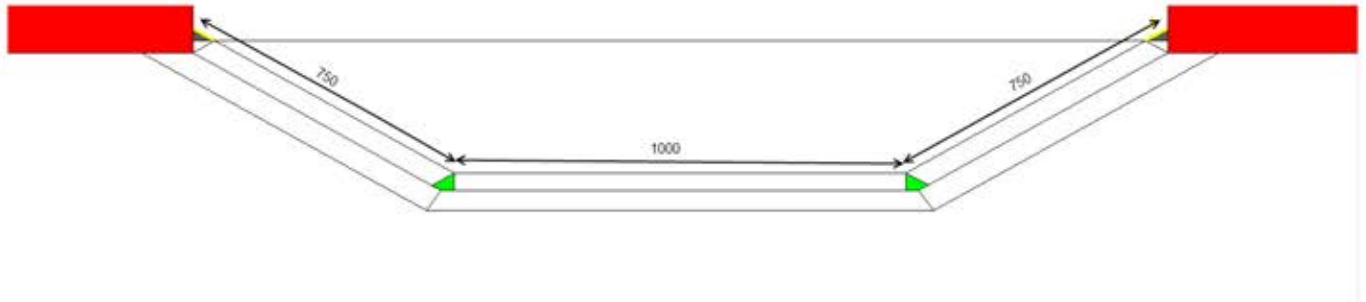


Alter the product options on this screen, (N.B. it will not alter the options on the other frames in the welded cill). Dimensions are not changeable in these options. To do this, change them in the parent options.



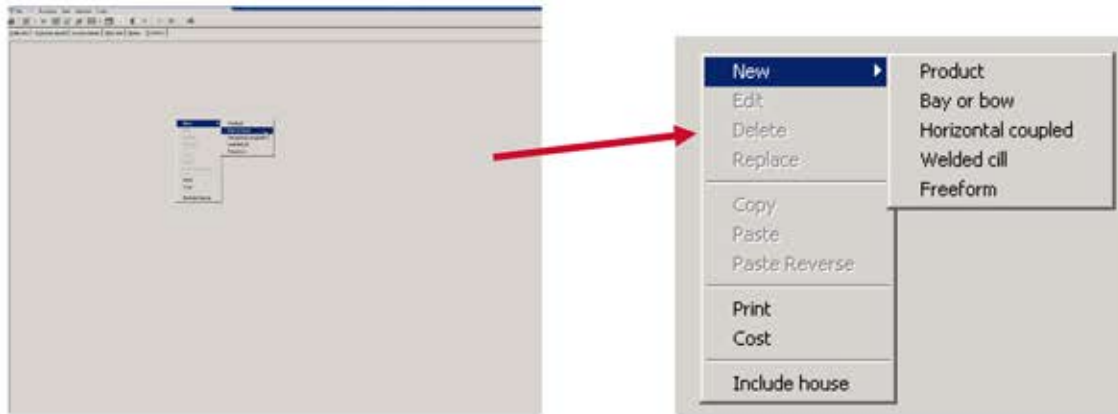
3.3: Creating a Bay or Bow

The illustration below shows an example for a bay. It has 3 segments, two 650mm and one 1000mm centre. All widths are measured internally, and may differ to the external angle.



To create a bay or bow, open a job as normal.

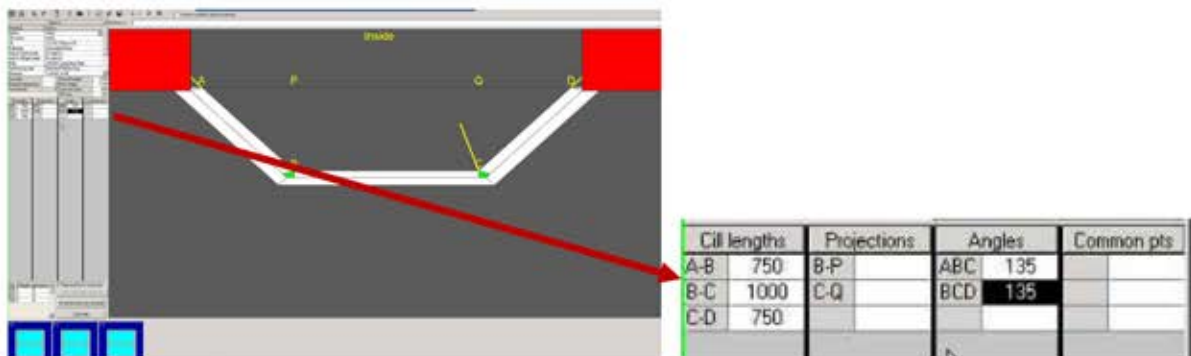
Select contents from the tab strip at the top, then right-click and select 'Bay or bow'.



Once this is done, select the product type (selecting to create a bay or to create a bow), then press the 'Exit' button to create.

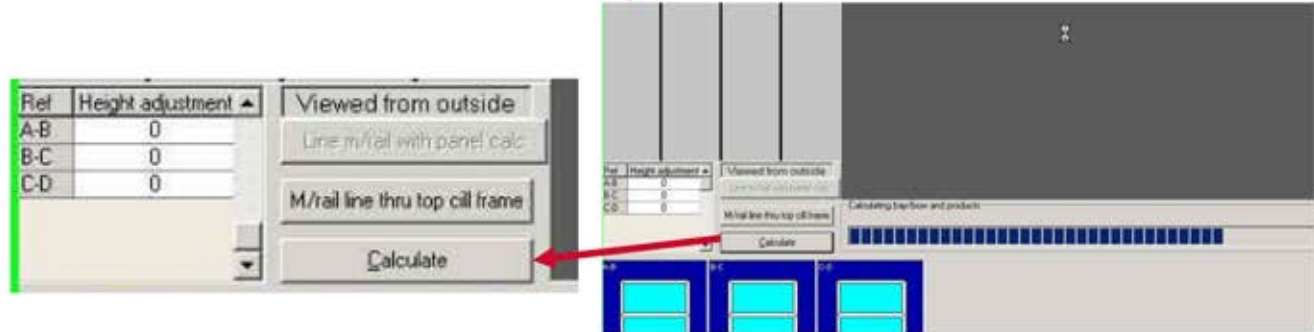


Now that the bay or bow has been created, set the dimensions. Set the cill lengths first, followed by the projections or angles, (dependent on which one is chosen, the opposing one will be calculated). **ONLY FILL ONE OF THE OPTIONS**



After the dimensions are set, press 'Calculate'. If the angles are inputted, the projections will automatically be calculated, and vice-versa.

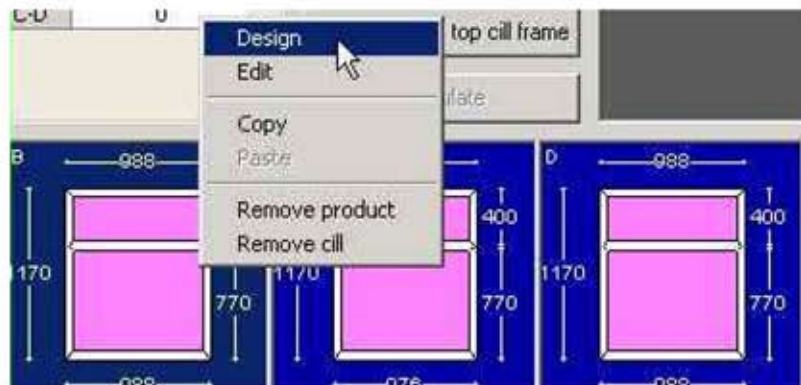
Give the software a few seconds to calculate.



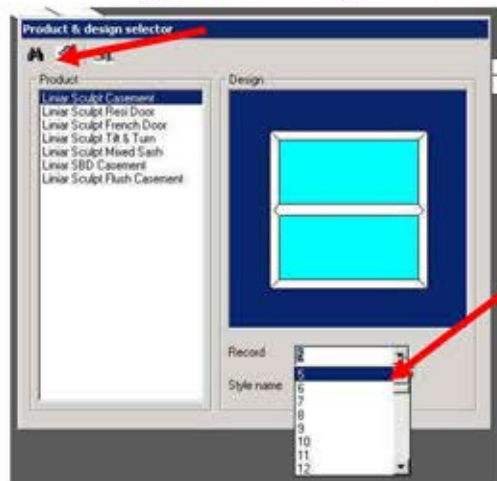
Once the dimensions are all set, start working on the frames.

The frames are located in the bottom corner. Right-clicking on a frame will bring up the options.

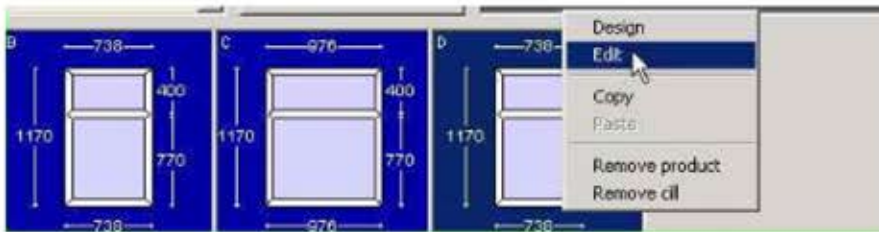
Select the type of product needed then select design.



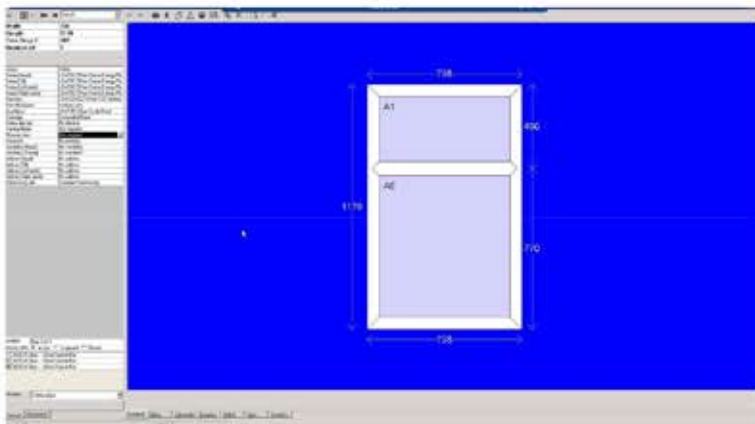
This will bring up the list of designs. Scroll through the different styles of this design using the binoculars, or the 'Record' bar.



Once the design and style has been chosen, select 'Edit' to alter the frame options.



If the 'Edit' button was selected, the next screen will be the 'Alter Products' screen. On this screen, everything is available to edit apart from the dimensions. To change the dimensions go back to the previous screen and change the cill lengths and the height.



In the list of overall options there is an option for a 'Cill'. This will also alter the cill on all of the frames included in this segment.

| Options | | Referenc |
|---------------------|-----------------------|---------------------|
| Heading | Option | |
| Colour | White | |
| Cill colour | White | |
| Cill | No cill | |
| Drainage | Face Drainage | |
| Add-on (Left jamb) | No add-on | |
| Add-on (Right jamb) | No add-on | |
| Pole | LAN232 Large Bay Pole | |
| Reinforcing rule | Standard Reinforcing | |
| Measure | To back of cill | |
| Quantity | 1 | Overall height 1200 |
| Baseline dimension | 2414 | Pole height 1200 |
| Front frame | 2513 | Transom drop 400 |
| | | Cill horn 0 |

Here is a good example. An 85mm stub cill is needed on one of the products, and a 150mm cill on a different product. Alter the parent options and select 'No Cill'. Then go inside each separate product to change the cill.

| | |
|--------------------|------------------------------|
| Colour | White |
| Cill colour | White |
| Frame (Head) | LSW012 57mm Frame Energy Plu |
| Frame (Cill) | LSW012 57mm Frame Energy Plu |
| Frame (Left jamb) | LSW012 57mm Frame Energy Plu |
| Frame (Right jamb) | LSW012 57mm Frame Energy Plu |
| Transom | LSW021/022 67mm T/Z Section |
| Tran/Mull joints | Welded joint |
| Bead type | LSW041 28mm Sculp Bead |
| Cill | LSL150 150mm Cill |
| Drainage | Concealed/Base |
| Frame drip bar | No drip bar |
| Glazing flipper | Not required |

To have no cill on the bay at all, be sure that 'No cill' has been selected for both the parent options and each of the frames options.

| | |
|--------------------|-------------------------------|
| Colour | White |
| Cill colour | White |
| Frame (Head) | LSW012 57mm Frame Energy Plus |
| Frame (Cill) | LSW012 57mm Frame Energy Plus |
| Frame (Left jamb) | LSW012 57mm Frame Energy Plus |
| Frame (Right jamb) | LSW012 57mm Frame Energy Plus |
| Transom | LSW021/022 67mm T/Z Section |
| Trans/Mull joints | Welded joint |
| Bead type | W041 28mm Sculpt Bead |
| Cill | LSL150 150mm Cill |
| Drainage | Concealed/Base |
| Frame drip bar | No drip bar |
| Glazing flipper | Not required |

| Options | |
|---------------------|-----------------------|
| Heading | Option |
| Colour | White |
| Cill colour | White |
| Cill | No cill |
| Drainage | Face Drainage |
| Add-on (Left jamb) | No add-on |
| Add-on (Right jamb) | No add-on |
| Pole | LAN232 Large Bay Pole |
| Reinforcing rule | Standard Reinforcing |
| Measure | To back of cill |
| Quantity | 1 |
| Overall height | 1200 |
| Baseline dimension | 2414 |
| Pole height | 1200 |
| Front frame | 2513 |
| Transom drop | 400 |
| Cill horn | 0 |

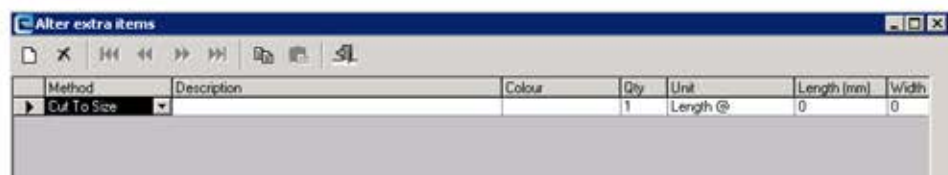
3.4: Adding Additional Items

Additional items may be required with the order. The additional items would be loose items separate from the frame. They may be something that was missing from the last order or something that needs adding onto an order. Additional items can also be added in without having to order a frame.

To start, open an order or quote. This can either be a new one or a previously made one. Once this is done, select 'Contents' from the top tab strip. This will open the frame contents of the order. On the top tool bar, select 'Extra Items' or select 'Glazing Items', (a choice between 'Frame Supplier' and 'Other Supplier' is also available).

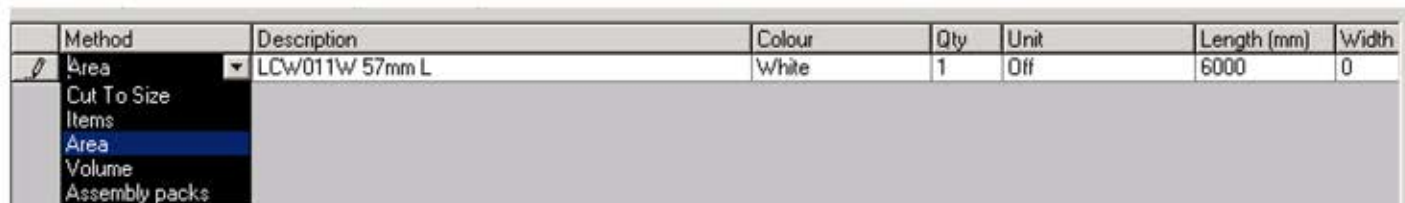


Selecting 'Frame supplier' allows changes such as, add, delete, copy and paste items.



-  -Create a new loose item to add to order
-  -Delete the selected item from the list
-  -Skip to very end of list
-  -Skip forwards an item
-  -Paste the previously copied item
-  -Copy the highlighted item

First alter the 'Method'. Change this to either 'Cut To Size', 'Items', 'Area', 'Volume' or 'Assembly packs'. Use these methods to select how the item will be made.



Next, select the 'Description'. This will bring up a different screen. Choose the item that needs to be put in place. There are many different options to choose from here. When this first opens it will show all items available to add.

Select extra itmes

Filter
 Category: Part type: Colour:

Code
 Description

| Colour | Description | Stock code |
|----------|------------------|------------|
| White | LCw011W 57mm L | LCw011W |
| Mahogany | LCw011BAH 57mm L | LCw011BAH |
| White | LCw017W 77mm L | LCw017W |

This is choosing which item needs to be put in place, there are many different options to be put in place here, and the first to choose from is the 'part type'. Select any part type available to narrow down the selection.

-
-
-
-
-
-
-
-

Select the colour of the part if needed. Some items required may not have colours available. But some other items may have a varied range of colours available, as there is less of a selection dependant on the part type chosen.

-
-
-
-
-
-
-
-

Each item has a unique stock code. If you know the stock code, enter into relevant box and the product will appear. If the code is not known, type the description of the item into the description box. Typing something simple such as 'cill', filters out every item relating to the word 'cill'.

Select extra itmes

Filter
 Category: Part type: Colour:

Code
 Description

| Colour | Description | Stock code |
|-------------------|---------------------------|------------|
| White | LCL085W 85mm Stub Cill | LCL085W |
| Mahogany | LCL085BAH 85mm Stub Cill | LCL085BAH |
| Mahogany on White | LCL085WAH1 85mm Stub Cill | LCL085WAH1 |

Once the item is found, double click on the item for it to be added. After it has been added, change other options about this item. The first one to select would be the 'Quantity'. Enter the quantity required for this item.

| Method | Description | Colour | Qty | Unit | Length (mm) | Width |
|-------------|----------------|--------|-----|----------|-------------|-------|
| Cut To Size | LCW011W 57mm L | White | 1 | Length @ | 6000 | 0 |

After this, select the 'Unit'. This can be set to either 'Length' or 'off'.

| Qty | Unit | Length (mm) | Width (mm) | Height (mm) | Unit | NETT Price | Override | Cost base SAT |
|-----|----------|-------------|------------|-------------|-------|------------|--------------------------|---------------|
| 1 | Length @ | 6000 | 0 | 20 | Per/M | £0.00 | <input type="checkbox"/> | £0.00 |

Enter the dimensions of the product, Change the 'Length', 'Width and 'Height' of the item. Also select the 'Unit'; choose either unit per/M, Each Per/M2 or per/M3.

| Qty | Unit | Length (mm) | Width (mm) | Height (mm) | Unit | NETT Price | Override | Cost base SAT |
|-----|----------|-------------|------------|-------------|-------|------------|--------------------------|---------------|
| 1 | Length @ | 0 | 0 | 0 | Per/M | £0.00 | <input type="checkbox"/> | £0.00 |

Item price:- select 'Override' if the price needs to be manually input, (this allows the price to be manipulated by the user).

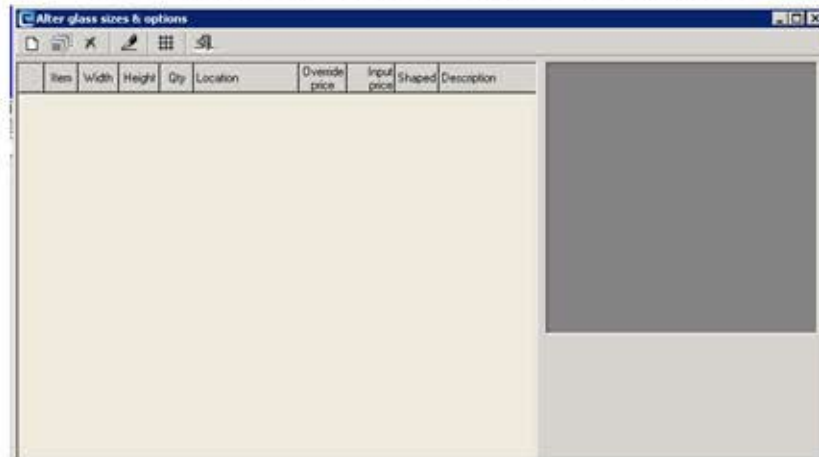
| Qty | Unit | Length (mm) | Width (mm) | Height (mm) | Unit | NETT Price | Override | Cost base SAT |
|-----|----------|-------------|------------|-------------|------|------------|-------------------------------------|---------------|
| 1 | Length @ | 600 | 20 | 20 | Each | £20.00 | <input checked="" type="checkbox"/> | £0.00 |

3.5: Adding Additional Glass

To add in extra glazing items, select the 'Glazing Items' to add in loose glass.



A new screen will appear allowing different options regarding glass to be chosen.

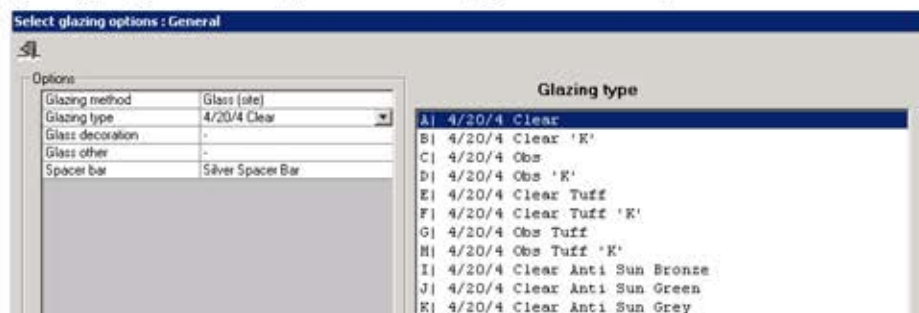


-  -Create a new glazing item
-  -Fast input of items into the jobs
-  -Delete the highlighted item from the list
-  -Edit item (Edits the general options of the item)
-  -Modify Glass decoration

Once a new glazing item has been selected, a new screen will show asking for the dimensions and quantity of the glazed item i.e.



Click 'OK' when the dimensions have been entered. A new screen will appear, where all the glazing options are available, such as glass type, glass method, glass decoration, glass other and spacer bar. There are a wide variety of choices within the options



Once all options for the glazing item have been chosen, the original screen will return, with the item on the list. Now the price is changeable by selecting 'Override price'. The dimensions are also changeable on this screen.

| Item | Width | Height | Qty | Location | Override price | Input price | Shaped | Description |
|------|-------|--------|-----|----------|--------------------------|-------------|--------------------------|----------------------|
| ▶ | 200 | 200 | 1 | Bathroom | <input type="checkbox"/> | 0.00 | <input type="checkbox"/> | 4/20/4 Clear -- Silv |

Once the glass options have been exited, the glazing item will appear on the contents, but if an extra item has been added, it will not appear on the contents but will appear on the invoice and other documents. Such as the price summary or acknowledgments.

Evolution (Satellite): Processing - [Contents]

File Edit Products View Window Tools

Quote info | Customer details | Invoice details | Misc info | Notes | Contents

| | | | |
|---------------------|--------|-------------|-------|
| Linlar SBD Casement | 1 | Loose glass | 1 |
| 1000 x 1000 | £38.59 | 200 x 200 | £0.00 |
| | | Bathroom | |
| Item 1 | Item 1 | | |

Price Summary

| Item | Product | Design | Quantity | Price net |
|------|---------------------|----------|----------|-----------|
| 1 | Linlar SBD Casement | Style: 6 | 1 | £38.59 |
| 11 | Loose glass | | 1 | £0.00 |
| 3 | LCW011W 57mm L | | 1 | £20.00 |

3.6: Setting-up Discounts

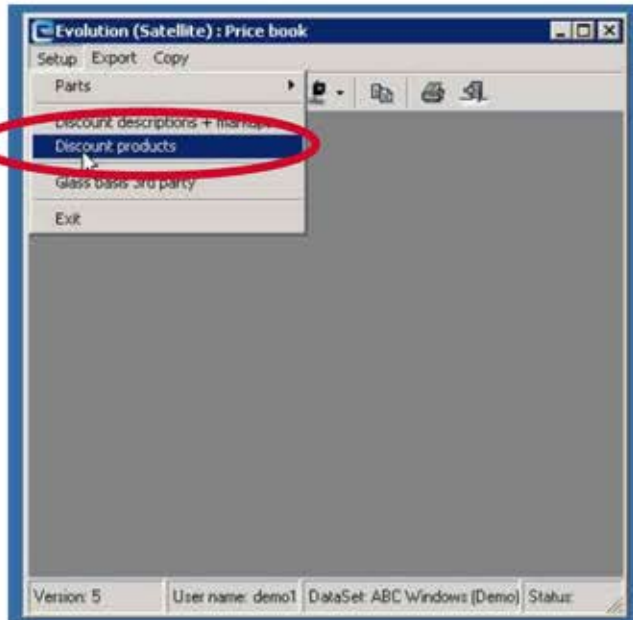
Begin by going to the starting screen and select, 'Price book'



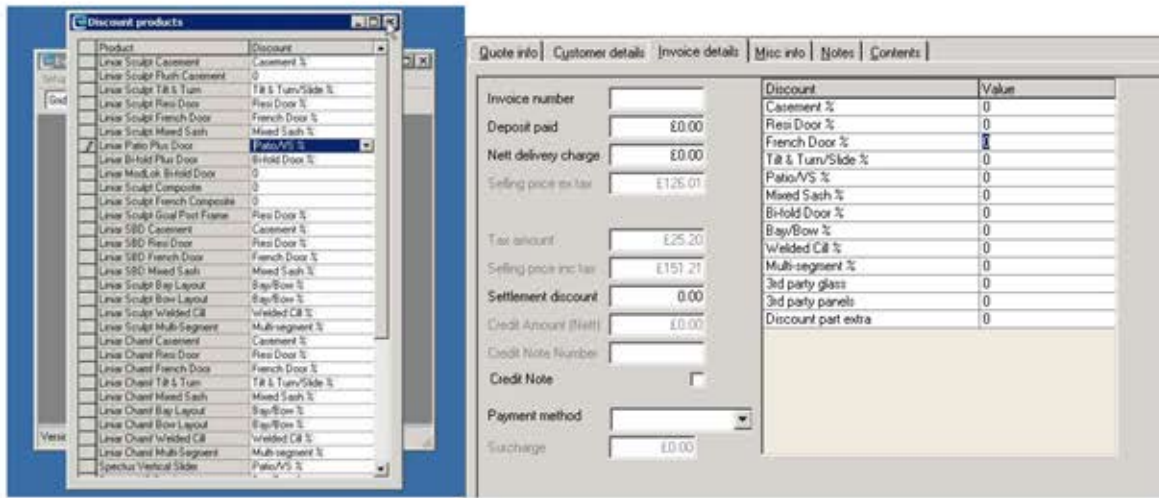
The next screen will look like the illustration below.



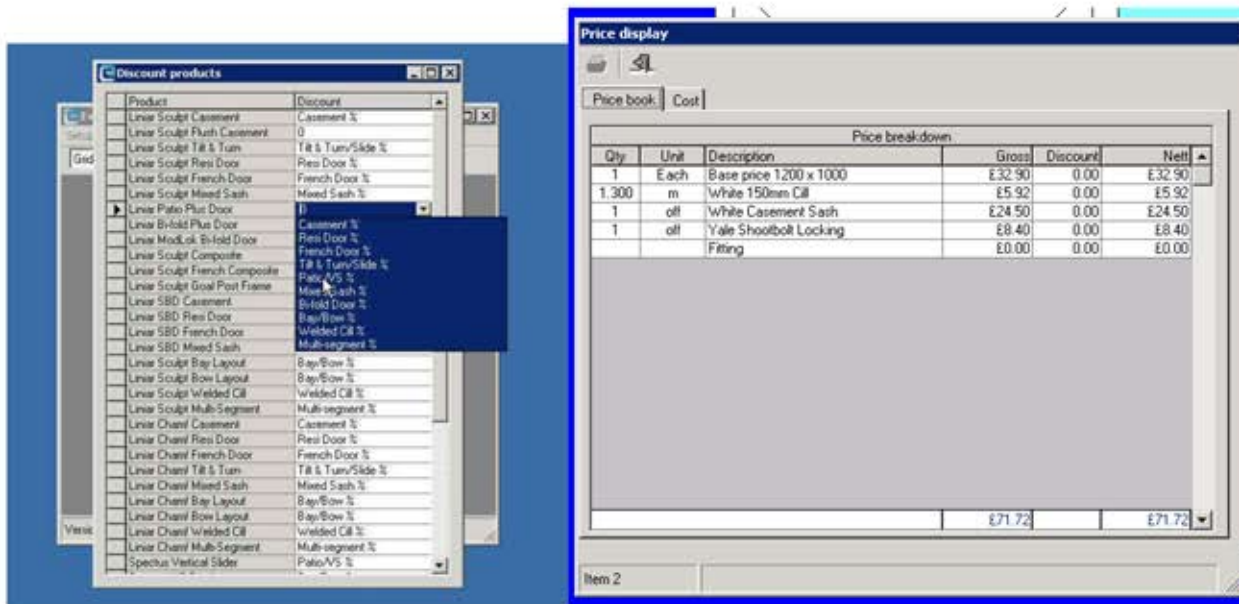
When on this screen, select 'Setup' from the top toolbar, go through the dropdown box and select 'Discount Parts'



The next screen is where the options are changeable. Below, some of the discount products are set to zero (Left) Meaning that the corresponding discount on the invoice details (right) would not be able to pick up this discount price.




Once the discount on the product is changed to match the corresponding product, the discounts are adjustable.

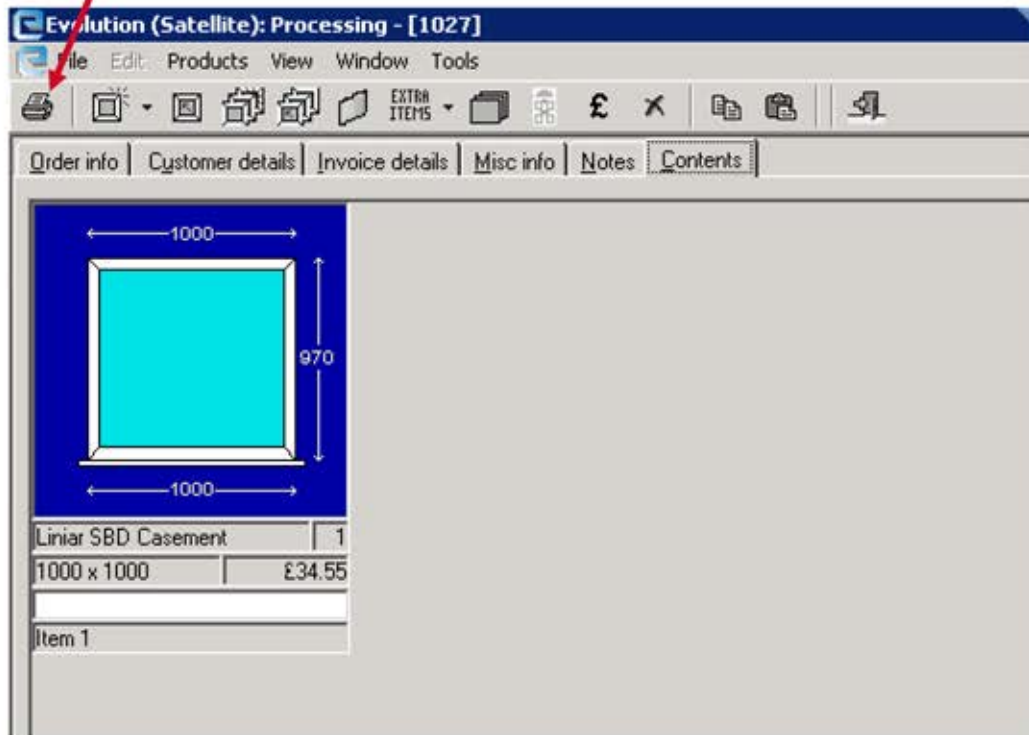


Once all of the discounts have been changed to match requirements, use the 'Exit' button to revert back to the previous screen. Then exit the programme completely and restart it to put changes into place.

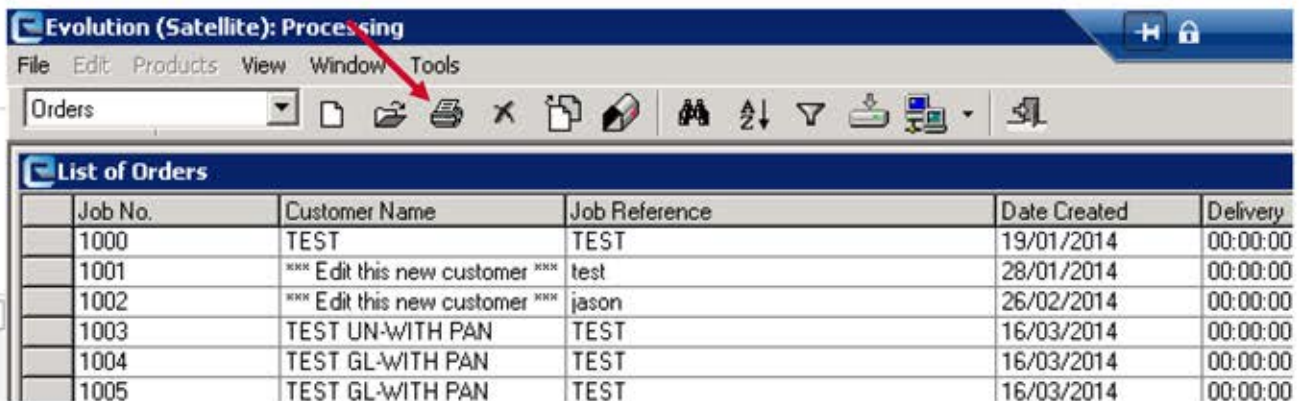


Section 4: Printing Documents\Reports

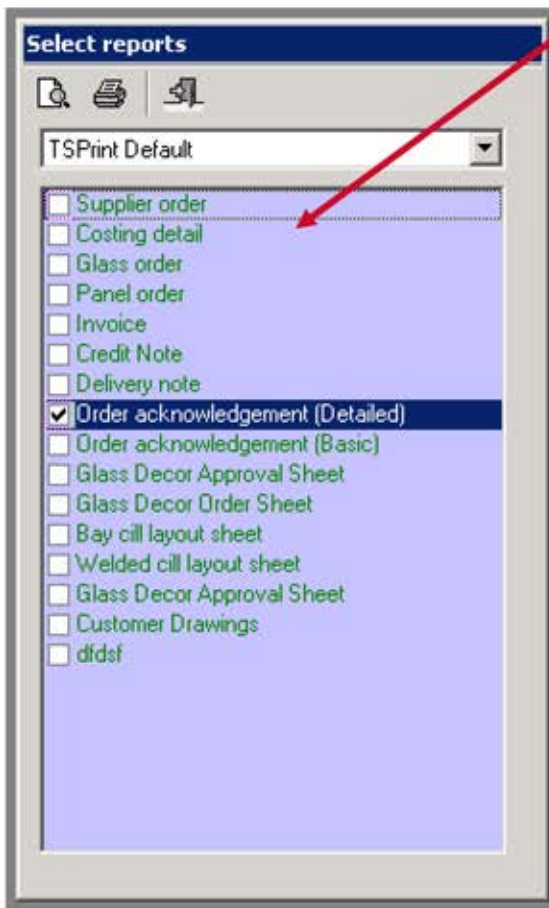
When you have returned to the contents screen, you may want to print out a job report. You can do this while still in the job, by clicking the  'Print' button



You can also do it from the job list, select the job and then press  button



A screen will appear displaying a list of documents available for printing, tick each document and press either the preview or print button (below).



Cancel.

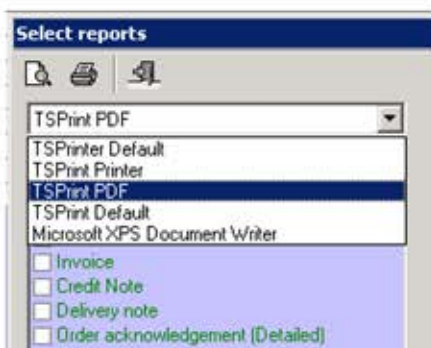


Preview the selected documents before printing



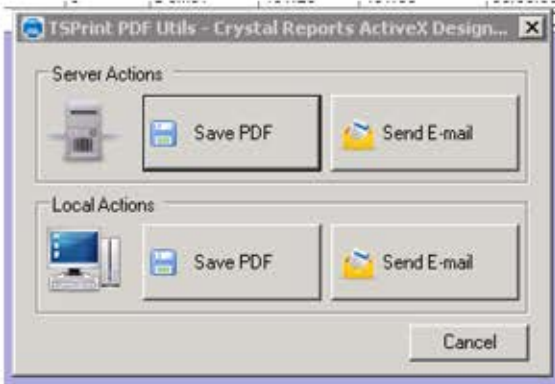
Print the selected documents, to the selected printer.

In addition to printing to your local printer, it is possible to download the document as a pdf file, from the drop down below select 'TSPrint PDF' and then press the print button.

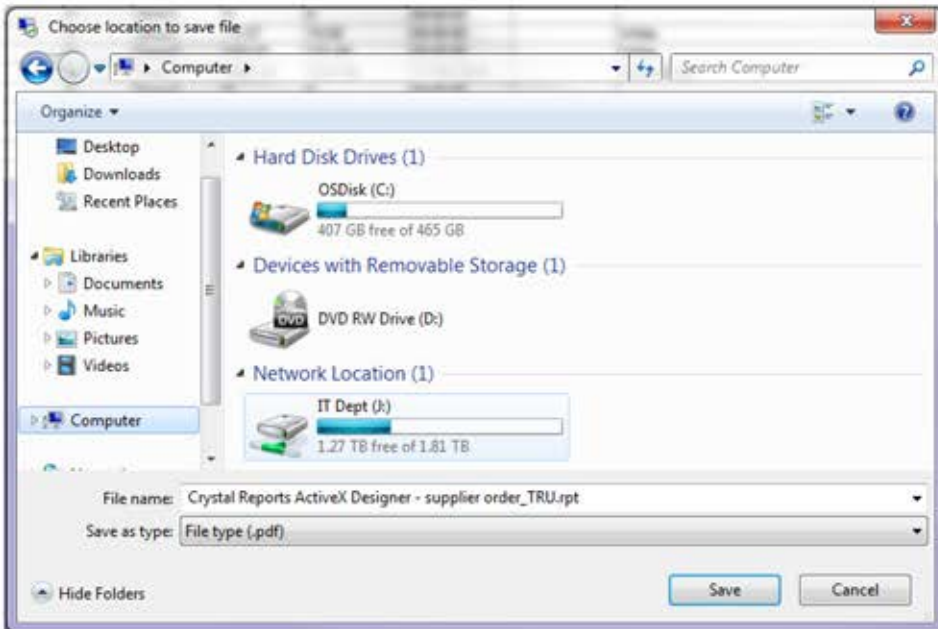


A few moments later the following should appear select Save PDF under 'Local Actions'

Please note: Do not use 'Send E-mail' as it usually does not work, or anything in the 'Server Actions' section.



Then change the file name and save the document to location on your computer (below).



Section 5: 3rd Party Glass Supplier Setup.

To set up glass descriptions and costs from your own supplier, from the main screen (below) select preferences.













From the tool bar press the arrow on the 'Glass' button, then select 'Buy In'



Glass (buy in)

| Description | Cost | Cost calc | Unit thickness | Obscure | Screen colour | Printer colour | XML code |
|-------------------------------|--------|--------------------|----------------|-------------------------------------|---------------|----------------|----------|
| TEST GLASS 3 | £0.00 | (/MSQ) Area (real) | 28 | <input type="checkbox"/> | | | |
| TEST GLASS2 | £0.00 | (/MSQ) Area (real) | 28 | <input type="checkbox"/> | | | |
| TEST GLASS1 | £0.00 | (/MSQ) Area (real) | 28 | <input type="checkbox"/> | | | |
| TEST GLASS | £20.00 | (/MSQ) Area (real) | 28 | <input type="checkbox"/> | | | |
| 4/20/4 Clear K' | £0.00 | (/MSQ) Area (real) | 28 | <input type="checkbox"/> | | | |
| 4/20/4 Obs K' | £0.00 | (/MSQ) Area (real) | 28 | <input checked="" type="checkbox"/> | | | |
| 4/20/4 Clear Tut K' | £0.00 | (/MSQ) Area (real) | 28 | <input type="checkbox"/> | | | |
| 4/20/4 Obs Tut K' | £0.00 | (/MSQ) Area (real) | 28 | <input checked="" type="checkbox"/> | | | |
| 4/20/4 Clear Softcoat | £0.00 | (/MSQ) Area (real) | 28 | <input type="checkbox"/> | | | |
| 4/20/4 Obs Softcoat | £0.00 | (/MSQ) Area (real) | 28 | <input checked="" type="checkbox"/> | | | |
| 4/20/4 Clear Tut Softcoat | £0.00 | (/MSQ) Area (real) | 28 | <input type="checkbox"/> | | | |
| 4/20/4 Obs Tut Softcoat | £0.00 | (/MSQ) Area (real) | 28 | <input checked="" type="checkbox"/> | | | |
| 4/20/4 Clear | £0.00 | (/MSQ) Area (real) | 28 | <input checked="" type="checkbox"/> | | | |
| 4/20/4 Obs | £0.00 | (/MSQ) Area (real) | 28 | <input checked="" type="checkbox"/> | | | |
| 4/20/4 Clear Tut | £0.00 | (/MSQ) Area (real) | 28 | <input checked="" type="checkbox"/> | | | |
| 4/20/4 Obs Tut | £0.00 | (/MSQ) Area (real) | 28 | <input checked="" type="checkbox"/> | | | |
| 4/20/4 Clear Optwhite | £0.00 | (/MSQ) Area (real) | 28 | <input type="checkbox"/> | | | |
| 4/20/4 Obs Optwhite | £0.00 | (/MSQ) Area (real) | 28 | <input checked="" type="checkbox"/> | | | |
| 4/20/4 Clear Tut Optwhite | £0.00 | (/MSQ) Area (real) | 28 | <input type="checkbox"/> | | | |
| 4/20/4 Obs Tut Optwhite | £0.00 | (/MSQ) Area (real) | 28 | <input checked="" type="checkbox"/> | | | |
| 4/20/4 Clear Anti Sun Bronze | £0.00 | (/MSQ) Area (real) | 28 | <input type="checkbox"/> | | | |
| 4/20/4 Clear Anti Sun Grey | £0.00 | (/MSQ) Area (real) | 28 | <input type="checkbox"/> | | | |
| 4/20/4 Clear Anti Sun Green | £0.00 | (/MSQ) Area (real) | 28 | <input type="checkbox"/> | | | |
| 4/20/4 Clear Anti Sun Bronze | £0.00 | (/MSQ) Area (real) | 28 | <input type="checkbox"/> | | | |
| 4/20/4 Clear Anti Sun Grey | £0.00 | (/MSQ) Area (real) | 28 | <input type="checkbox"/> | | | |
| 4/20/4 Clear Anti Sun Green | £0.00 | (/MSQ) Area (real) | 28 | <input type="checkbox"/> | | | |
| ▶ TYPE GLASS DESCRIPTION HERE | £0.00 | (/MSQ) Area (real) | 28 | <input type="checkbox"/> | | | |

-  Delete glass item from list
-  Create new glass item
-  Reset the order of the list
-  Back to preferences
-  Print this panel information
-  Increase the percent of cost
-  Move this item down one in the list
-  Move item to the bottom of list
-  Move this item up one in the list
-  Move item to the top of the list

To create a new glass item select the 'New' button, this will create a duplicate of the currently selected item, this new line can be edited.

| Glass type Pattern Decoration Glass other Spacer bar Miscellaneous | | | | | | | |
|--|-------|--------------------|----------------|--------------------------|---------------|----------------|----------|
| Description | Cost | Cost calc | Unit thickness | Obscure | Screen colour | Printer colour | XML code |
| ▶ 4/20/4 Clear | £0.00 | (/MSQ) Area (real) | 28 | <input type="checkbox"/> | | | |

The glass description can be edited to your preference.

Description

4/20/4 Clear

The cost would be the base cost of the glass. Costs for other items i.e. decoration, will be added onto this base cost.

Cost

£0.00

The 'Cost calc' column determines how the glass are priced, click on the cell to display the available options (below);

| Component | Requirement |
|-----------------------|---|
| (/MSQ) Area (real) | Area of the Glass. |
| (/MSQ) Area (overall) | Area of the glass plus the surrounding frame. |
| Each | Per glass item. |
| (/M) Perim (real) | Perimeter of the glass. |
| (/M) Perim (overall) | Perimeter of the frame surrounding the glass |
| (/M) Width (real) | Glass Width. |
| (/M) Width (overall) | Glass width including the surrounding frame |
| (/M) Height (real) | The height of the glass. |
| (/M) Height (overall) | The height of the glass including the surrounding frame |
| (%) Premium | Percentage of increase on glass cost. |
| (%) Discount | Percentage of discount of glass cost |
| Panel Surcharge Table | DO NOT USE |
| (/KG) Weight | DO NOT USE |

| Cost calc | Unit thickn |
|-----------------------|-------------|
| (/MSQ) Area | 28 |
| (/MSQ) Area (real) | |
| (/MSQ) Area (overall) | |
| Each | |
| (/M) Perim (real) | |
| (/M) Perim (overall) | |
| (/M) Width (real) | |
| (/M) Width (overall) | |
| (/M) Height (real) | |
| (/M) Height (overall) | |
| (%) Premium | |
| (%) Discount | |
| Panel surcharge table | |
| (/Kg) Weight | |

| |
|----------------|
| Unit thickness |
| 28 |

Glass unit thickness, this must be filled in, 28mm = 4-20-4 (2 x 4mm glass with a 20mm gap).

| |
|--------------------------|
| Obscure |
| <input type="checkbox"/> |

Tick if the unit requires patterned glass.

| |
|---------------|
| Screen colour |
| |

The screen colour for the glass type to display when viewing the frame.

Each of tabs provides additional glass options, costs set within these tabs are additional costs added to the base cost set under the 'Glass type' tab. Options can amended, deleted and added.

| Glass type | Pattern | Decoration | Glass other | Spacer bar | Miscellaneous |
|-------------|---------|--------------------|-------------|------------|---------------|
| | | | | | |
| Description | Cost | Cost calc | XML code | | |
| - | £0.00 | (/MSQ) Area (real) | | | |
| *TBA* | £0.00 | (/MSQ) Area (real) | | | |

Glass patterns available if the 'Obscure' tick box has been set under the 'Glass type' tab.

| Glass type | Pattern | Decoration | Glass other | Spacer bar | Miscellaneous | | | | | |
|-----------------|---------|--------------------|-------------|------------|---------------|--------------|-------------|--------------|--------------------------|--------------------------|
| | | | | | | | | | | |
| Description | Cost | Cost calc | Decor type | Width bar | Edge glass | Xform centre | Optim width | Optim height | Sgl Ver | Sgl F |
| - | £0.00 | (/MSQ) Area (real) | None | 0 | 0 | 0 | 0 | 0 | <input type="checkbox"/> | <input type="checkbox"/> |
| 6mm Square Lead | £0.00 | (/MSQ) Area (real) | Square lead | 6 | 12 | 3 | 150 | 200 | <input type="checkbox"/> | <input type="checkbox"/> |

Glass decorations such as diamonds leads, Georgian bars etc.

| | | | |
|-----------|-------|------|--|
| Argon Gas | £0.00 | Each | |
| Xenon Gas | £0.00 | Each | |

'Glass other' is provided for any additional options that are not suitable for set up under the previous tabs.

| Glass type | | Pattern | | Decoration | | Glass other | | Spacer bar | | Miscellaneous | |
|---------------------|--|---------|--|------------|--|-------------|-------------------|------------|----------|---------------|--|
| Description | | | | | | Cost | Cost calc | | XML code | | |
| ▶ Silver Spacer Bar | | | | | | £0.00 | (/M) Perim (real) | | | | |

Spacer bar options.

| Glass type | | Pattern | | Decoration | | Glass other | | Spacer bar | | Miscellaneous | |
|---|--|---------|--|------------|--|-------------|--|------------|--|---------------|--|
| Description | | | | | | | | Value | | | |
| Minimum glass area to cost for (m ²) | | | | | | | | 0.30 | | | |
| Minimum glass area to price for (m ²) | | | | | | | | 0.30 | | | |

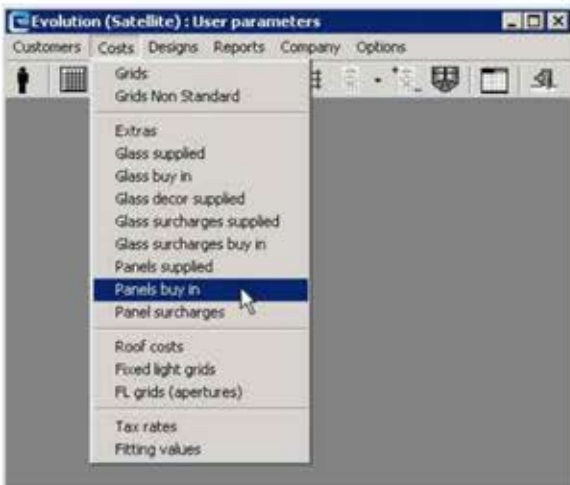
'Miscellaneous' includes minimum glass area for costing and pricing to the end customer. Your glass supplier will usually charge for a minimum area if the actual area fall below this value. Often this value is set to 0.3 for both cost and price.

Section 6: 3rd Party Panel Supplier Setup

To set up costs and prices for your panels, go to the start-up screen and choose **Preferences**.





Then under the menu option choose **Costs** and then **Panels buy in**.




Now that you have done that you will be brought to this screen




To add in a new **Panel type**, click the  button. See below for an explanation of what the other buttons do:


 Create new panel item

 Move item to top/bottom of list

 Print the panel information

 Delete panel item from list

 Reset the order of the list

 Go back to preferences

 Move item up/down by one

 Increase cost/price of items

Set the **Cost calc** type. This is how the panel cost will be calculated.

| | |
|-----------------------|----------------|
| Cost calc | Unit thickness |
| (/MSQ) Area | 28 |
| (/MSQ) Area (real) | |
| (/MSQ) Area (overall) | |
| Each | |
| (/M) Perim (real) | |
| (/M) Perim (overall) | |
| (/M) Width (real) | |
| (/M) Width (overall) | |
| (/M) Height (real) | |
| (/M) Height (overall) | |
| (%) Premium | |
| (%) Discount | |
| Panel surcharge table | |
| (/Kg) Weight | |

| Cost calculation description | Calculation explanation |
|------------------------------|---|
| (/MSQ) Area (real) | Area of the glass unit |
| (/MSQ) Area (overall) | Area of the glass unit including the surrounding frame |
| Each | Per glass unit |
| (/M) Perim (real) | Perimeter of the glass unit |
| (/M) Perim (overall) | Perimeter of the glass unit including the surrounding frame |
| (/M) Width (real) | Width of the glass unit |
| (/M) Width (overall) | Width of the glass unit including the surrounding frame |
| (/M) Height (real) | Height of the glass unit |
| (/M) Height (overall) | Height of the glass unit including the surrounding frame |
| (%) Premium | Percentage mark-up on top of the glass cost |
| (%) Discount | Percentage discount off of the glass cost |
| Panel Surcharge Table | DO NOT USE |
| (/KG) Weight | DO NOT USE |

Please note – unlike the 3rd party glass set up, panels have both a cost and price column to allow more flexibility.

| |
|----------------|
| Unit thickness |
| 0 |
| 28 |
| 28 |

Set the panel thickness, which will most likely be 28mm

| |
|-------------------------------------|
| Hardware |
| <input type="checkbox"/> |
| <input checked="" type="checkbox"/> |
| <input checked="" type="checkbox"/> |

If you select **Hardware** then you will be able to choose more options when inputting your panel (see below).

The other tabs will show optional extras that can be added to your panel. The cost and price will be added to the basic **Panel type**. See below example of a very basic setup:

Letterbox

| Description | Cost | Cost calc | Price | Price calc |
|-----------------|-------|--------------------|-------|--------------------|
| - | £0.00 | (/MSQ) Area (real) | £0.00 | (/MSQ) Area (real) |
| Panel Letterbox | £0.00 | (/MSQ) Area (real) | £0.00 | (/MSQ) Area (real) |

Numerals

| Description | Cost | Cost calc | Price | Price calc |
|----------------|-------|--------------------|-------|--------------------|
| - | £0.00 | (/MSQ) Area (real) | £0.00 | (/MSQ) Area (real) |
| Panel Numerals | £0.00 | (/MSQ) Area (real) | £0.00 | (/MSQ) Area (real) |

Knocker

| Description | Cost | Cost calc | Price | Price calc |
|---------------|-------|--------------------|-------|--------------------|
| - | £0.00 | (/MSQ) Area (real) | £0.00 | (/MSQ) Area (real) |
| Panel Knocker | £0.00 | (/MSQ) Area (real) | £0.00 | (/MSQ) Area (real) |

Other options

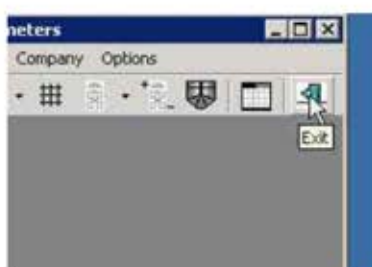
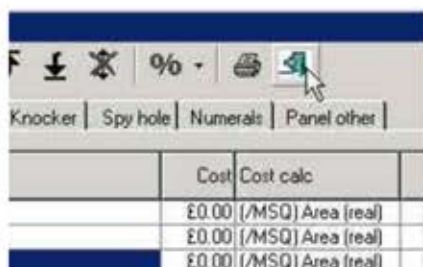
| Description | Cost | Cost calc | Price | Price calc |
|---------------------|-------|--------------------|-------|--------------------|
| - | £0.00 | (/MSQ) Area (real) | £0.00 | (/MSQ) Area (real) |
| Panel Other Options | £0.00 | (/MSQ) Area (real) | £0.00 | (/MSQ) Area (real) |

Spy hole

| Description | Cost | Cost calc | Price | Price calc |
|----------------|-------|--------------------|-------|--------------------|
| - | £0.00 | (/MSQ) Area (real) | £0.00 | (/MSQ) Area (real) |
| Panel Spy Hole | £0.00 | (/MSQ) Area (real) | £0.00 | (/MSQ) Area (real) |

Set the first line as an empty option, using a placeholder character such as a hyphen, for instances when the option type is not required.

Once you have finished editing the panel select exit on both screens to revert back to the start screen.



When processing a job be sure to choose **3rd party supplier** to ensure that your options appear.

You may need to restart the software for your newly setup panel options to become available

Section 7: Pricing

There are several methods that can be used to add a mark-up to the job cost price. The first and easiest way is to trick the program into adding a percentage mark-up by setting a negative discount, see below.

The screenshot shows the 'Evolution (Satellite): Processing - [1029]' window. The 'Invoice details' tab is active. On the left, there are input fields for Invoice number, Deposit paid (£0.00), Nett delivery charge (£0.00), Selling price ex tax (£47.38), Tax amount (£9.48), Selling price inc tax (£56.86), Settlement discount (0.00), Credit Amount (Nett) (£0.00), Credit Note Number, Credit Note (checkbox), Payment method, and Surcharge (£0.00). On the right, a table lists various discount categories and their values:

| Discount | Value |
|---------------------|-------|
| Casement % | -50 |
| Resi Door % | -50 |
| French Door % | -50 |
| Tilt & Turn/Slide % | -40 |
| Patio/VS % | -40 |
| Mixed Sash % | -40 |
| Bi-fold Door % | -40 |
| Bay/Bow % | -40 |
| Welded Cill % | -40 |
| Multi-segment % | -40 |
| 3rd party glass | -40 |
| 3rd party panels | -40 |
| Discount part extra | 0 |

For each 'Discount' category, set the desired mark-up as negative number, then click the **Contents** tab. The program will recalculate the job value, to the new price.

When double-clicking an item on the job to view the product details, you will see more detail in the **Display prices** window.



The pop up form displays item pricing, the **Gross** column is your net cost from TruFrame (taking into account your discount). The **Nett** column is the mark-up price to the customer. The 'Discount' column displays the negative discount you set earlier.

The 'Price display' window shows a 'Price book' and 'Cost' tab. The 'Price break-down' table is as follows:

| Qty | Unit | Description | Gross | Discount | Nett |
|-------|------|------------------------|--------|----------|--------|
| 1 | Each | Base price 1000 x 1000 | £22.40 | -50.00 | £33.60 |
| 1.100 | m | White 150mm Cill | £5.01 | -90.00 | £7.51 |
| 3.940 | m | Screw Retainer | £1.18 | -50.00 | £1.77 |
| 1 | off | Glazing clips | £3.00 | -50.00 | £4.50 |
| | | Fitting | £0.00 | 0.00 | £0.00 |
| | | | £31.59 | | £47.38 |

Another pricing method is to simply change the pricing method to **Manually input**, see below:

Evolution (Satellite): Processing - [1030]

File Edit Products View Window Tools

Order info | Customer details | Invoice details | Misc info | Notes | Contents

Job number: 1030 Orderbook ID: []

Name: [] RETAIL CUSTOMER 1

Reference: []

Project name: []

Status: [] Job on hold Job confirmed

Fensa number: [] Job checked

Glazed: Yes No Remake job Job paid

Fitting: Supply only (UK) Pricing: Cost+markup grid Glass ordered

Delivery type: Delivery Defaults: **Manually input**

Input by: Demo1 Cust type: []

Salesman: []

Surveyor: [] Del category: []

Fitting team: [] Glass from: 3rd Party supplier

Brick cavity: [] Panels from: 3rd Party supplier

WER: No rating

Dates

Order: 24/04/2014

Checked: []

Confirmed: []

Normal glass: []

Toughened: []

Panel: []

Received: []

Loaded: []

Delivery: []

Invoice: []

Paid: []

Switch to the **Invoice details** tab, and enter the overall selling pricing into either **Selling price ex tax** or **Selling price inc tax** fields.

Evolution (Satellite): Processing - [1030]

File Edit Products View Window Tools

Order info | Customer details | **Invoice details** | Misc info | Notes | Contents

| Invoice number | Value |
|------------------------------|--------------------------|
| Deposit paid | £0.00 |
| Nett delivery charge | £0.00 |
| Selling price ex tax | £156.82 |
| Tax amount | £31.36 |
| Selling price inc tax | £188.18 |
| Settlement discount | 0.00 |
| Credit Amount (Nett) | £0.00 |
| Credit Note Number | [] |
| Credit Note | <input type="checkbox"/> |
| Payment method | [] |
| Surcharge | £0.00 |

| Discount | Value |
|---------------------|-------|
| Casement % | -50 |
| Resi Doors % | 0 |
| French Door % | 0 |
| Tilt & Turn/Slide % | 0 |
| Patio/VS % | 0 |
| Mixed Sash % | 0 |
| Bi-fold Doors % | 0 |
| Bay/Bow % | 0 |
| Welded Cill % | 0 |
| Multi-segment % | 0 |
| 3rd party glass | 0 |
| 3rd party panels | 0 |
| Discount part extra | 0 |

As you are setting the overall job price, all the individual item pricing will be set to zero.

Section 8: Transferring Quotes to Orders

If you have created a quote and the customer has placed an order the quote can be copied or moved into the order list. From the quote list select the **Copy current job** button, this enables you to copy your highlighted job into another job type.

Please note – you must highlight your desired job before pressing the **Copy current job** button.

The screenshot shows the 'Evolution (Satellite): Processing' application window. The menu bar includes File, Edit, Products, View, Window, and Tools. The toolbar contains various icons, with the 'Copy' icon (two overlapping sheets of paper) circled in red. Below the toolbar is a 'List of Quotes' table:

| Job No. | Date Quote | Customer Name | Job Reference |
|---------|------------|---------------|---------------|
| 1000 | 07/01/2014 | Test Customer | |
| 1001 | 08/01/2014 | Test Customer | |
| 1002 | 09/01/2014 | | |
| 1003 | 09/01/2014 | Test Customer | |

The screen below should appear. Select the right hand drop down list and change from **Quote** to **Order**. Next, press the **First free** button and then the **Save** button. After the copy operation has completed, the program will ask if you wish to keep the original quote or delete it.

The 'Save As...' dialog box is shown with the following details:

- Current:**
 - Job type: Quote
 - Sub directory: 2014\Jan\
 - Filename: 1001
- Save As...:**
 - Job type: Order
 - Sub directory: Order
 - Filename: 1001
 - Buttons: First free, Save, Cancel
 - Options:
 - Add [old file number] to new name
 - Copy across deposit paid
 - Copy across nett delivery charge