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Upgrading from older versions

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

If your current version is	What's New	Release Notes
Windowmaker 2018 (v7.x)	www.windowmaker.com/EN/PDF/Windowmaker%202018%20(v7.x)%20What's%20New.pdf	www.windowmaker.com/EN/PDF/Windowmaker%202018%20(v7.x)%20Release%20Notes.pdf
Windowmaker 2012 (v6.x)	www.windowmaker.com/EN/PDF/Windowmaker%202012%20(v6.x)%20What's%20New.pdf	www.windowmaker.com/EN/PDF/Windowmaker%202012%20(v6.x)%20Release%20Notes.pdf

Windowmaker 2020 R1.1

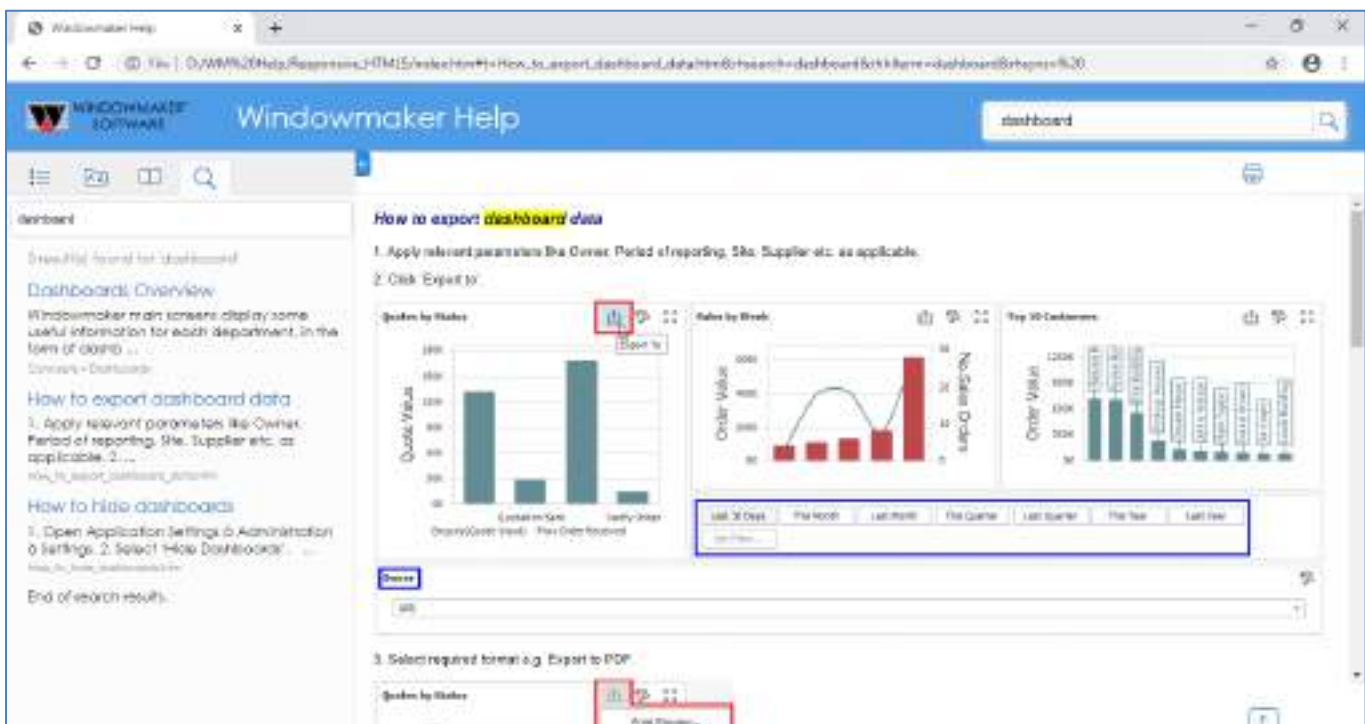
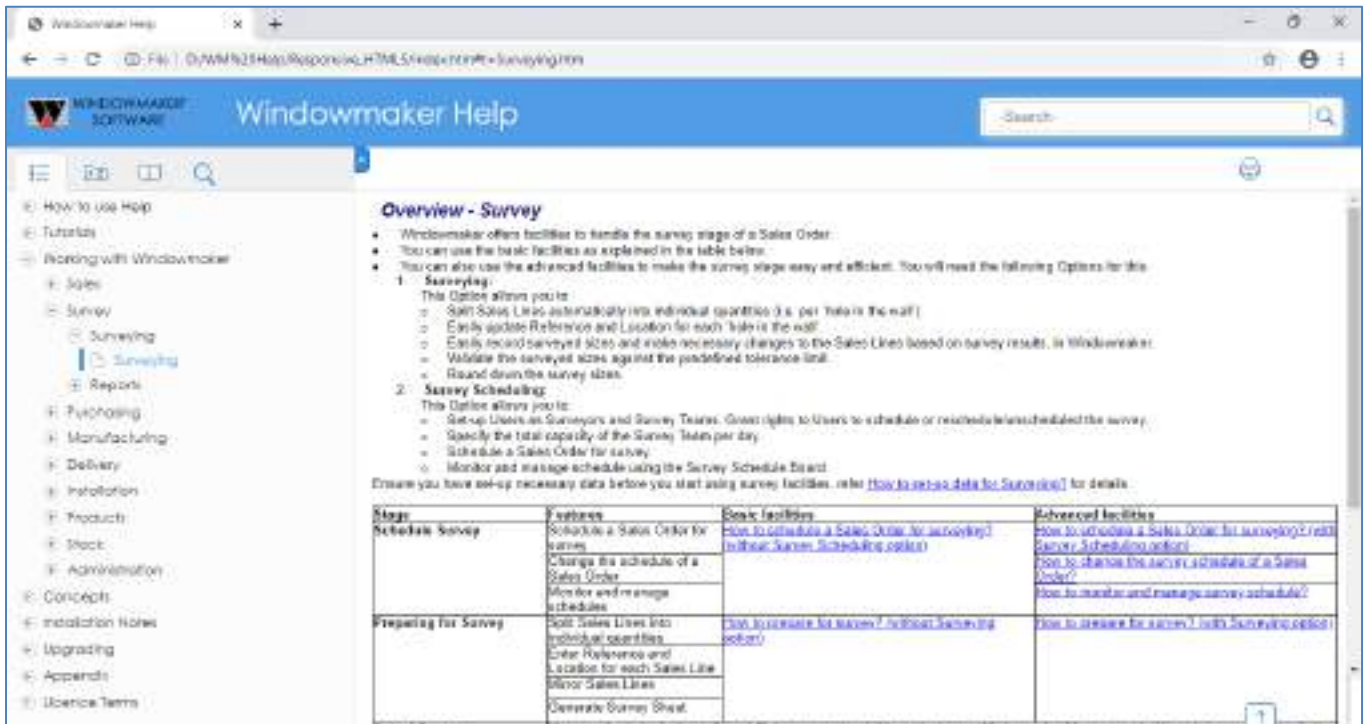
What's New

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

General Enhancements

Windowmaker Helpfile

The Windowmaker helpfile is now in HTML format. This gives a better look and feel and can be opened in a browser.



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Dashboards

Hiding dashboards now hides only the charts; the counts are always displayed. This is done so that the counts visible in earlier versions are still available even if dashboards are hidden.

Earlier versions:



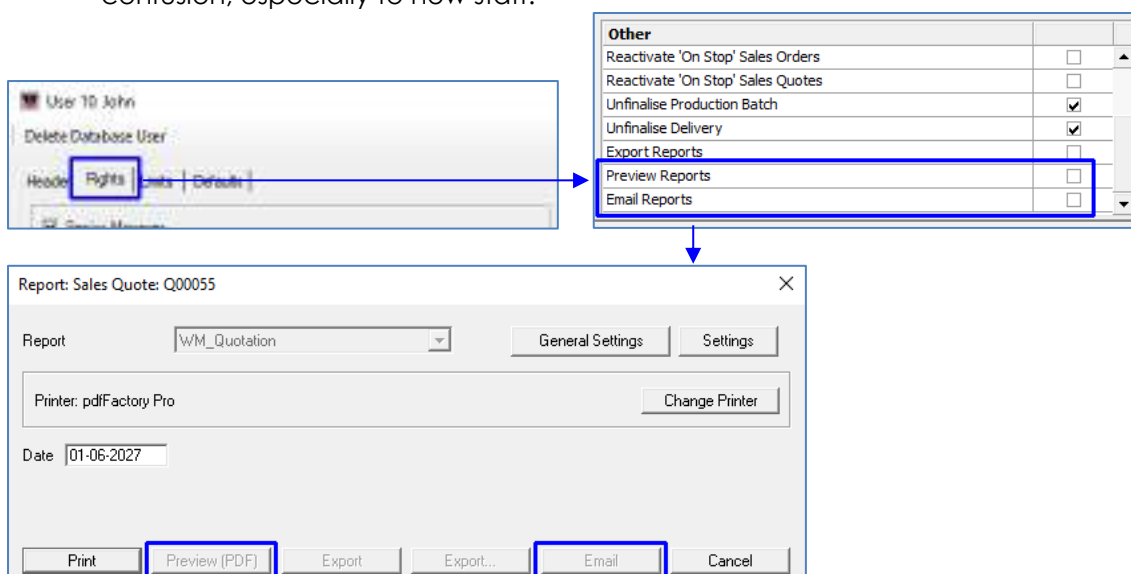
After upgrade:



User Rights

Windowmaker now provides User Rights to restrict previewing and emailing reports. This is useful in scenarios e.g.:

- Copies of reports sent to customers can be saved in History. Sales people could preview report PDFs, save them and send to customer. This activity is not recorded in History, preventing management to keep track of things.
- Emailing reports work only with desktop email applications. So, if you are using a web email application (e.g. gmail, yahoo) then you may not grant the Email Reports right to users. This will help avoiding confusion, especially to new staff.



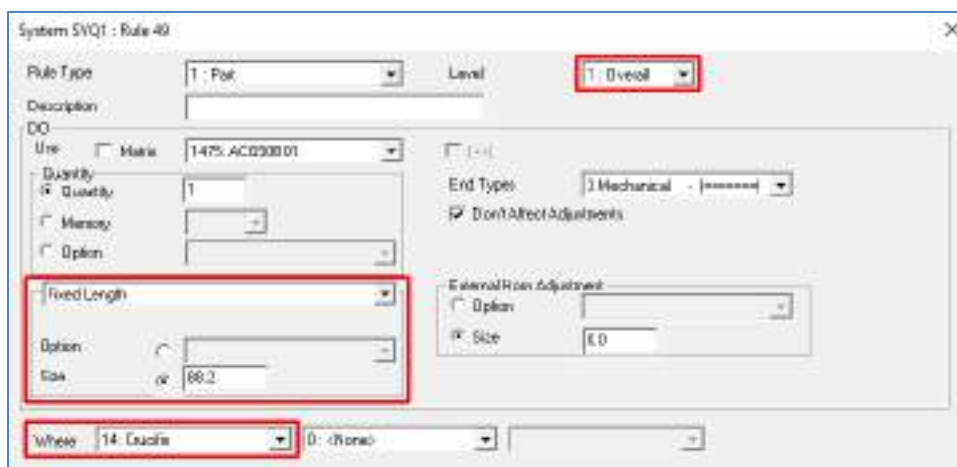
Fixed Length Parts

You can now calculate profile/reinforcement parts of fixed length, which are independent of the frame/pane sizes. It is treated as a normal part in all other respects e.g. included in optimised cutting instructions, stock management. This is useful for calculating such parts e.g. glazing support wedges.



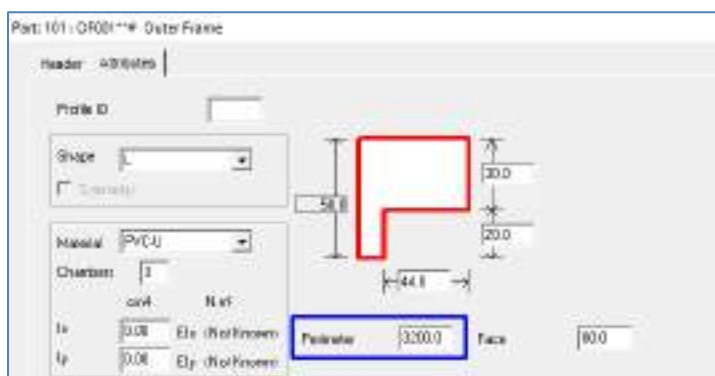
Crucifix

It is now possible to calculate profile/reinforcement/reel/unit parts at crucifix for Overall level. This is useful e.g. to calculate fixed length brackets for transom/mullion joins in curtain walls.



Set-up - Parts

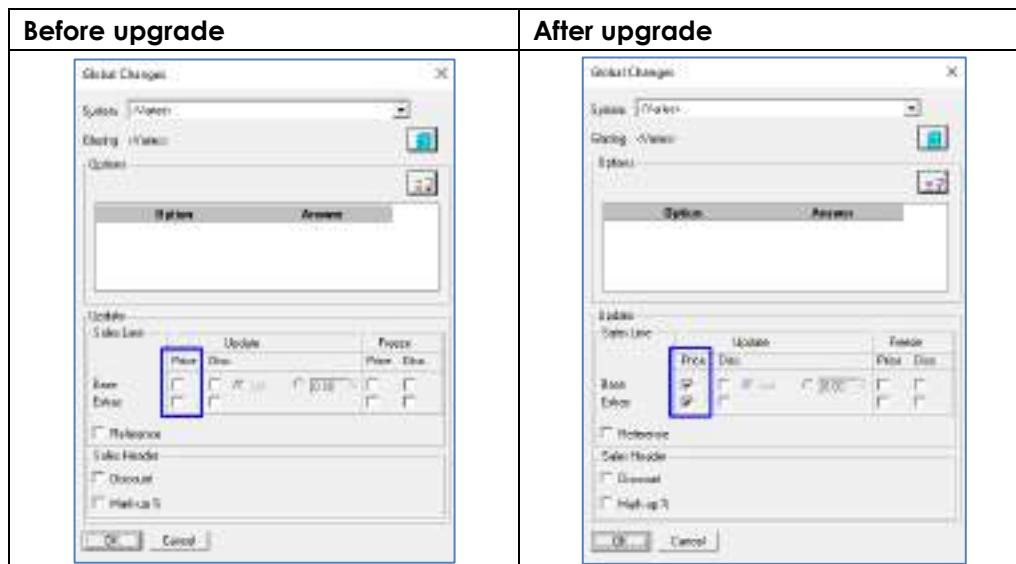
Part - Attributes now allow a maximum value of 3200 mm (125 63/64 inches in Imperial) for the Perimeter. Earlier this was limited to 1000 mm.



Enhancement to Options

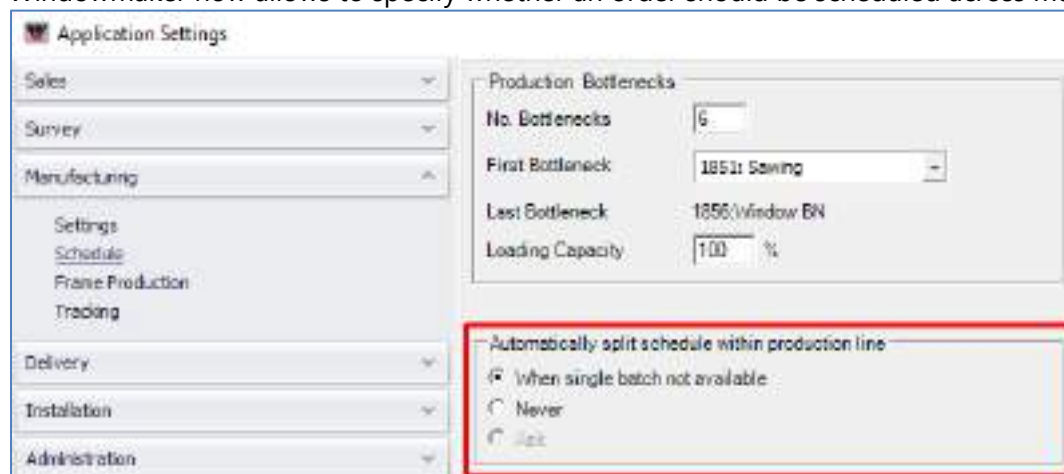
Global Changes

Doing Global Changes now updates Base & Extras Prices by default. For this, the 'Update Price' check boxes are selected by default. Earlier, the user had to select these manually. If one forgets to do so, then the changes were applied without the price getting updated.



Production Scheduling

Windowmaker now allows to specify whether an order should be scheduled across multiple production batches.



Link to Stock

Link to Stock now does not require creating stock records.

Link to Saw

Windowmaker now links to:

1. Graf Synergy 'Cut 500' cutting centre.
2. Dega (DECALUMA) Double Mitre Saw LJ2FJ-CNC-500.
3. Dega (DECALUMA) Glazing Bead Saw SJBWJ-CNC-3500.

Link to Working Centre

Windowmaker now links to Dega (DECALUMA) RUMBA3 working centre.

Breaking Changes

This section lists important behaviour changes, which are introduced in this version. These must be read in order to understand how they might affect your installation & upgrade process.

General Enhancements

Database Schema Changes

Changes specific to each table are as listed below:

Table	Column	Change
WMCustomerHistory	WMCustomerHistoryID	WMCustomerHistoryID type is changed to BIGINT from INT. The column type is now BIGINT.

Issues Fixed

Windowmaker 2020 R1.1 SP1

Order Entry | Mixable by Frame Options – 4349, 4470

Problems related to Incorrect functioning of 'Mixable by Frame' options are now resolved.

Order Entry | Sales Line | Status - 4210

Problem with Sales Line added after Order Status moved to 'Despatched' not appearing in Invoice document is now resolved. This affected unscheduled orders for Scheduling users.

Order Entry | Elevations - 3805

Problem with Elevations not getting copied correctly for Phased Quotes containing 'Property' Sales Lines is now resolved.

Windowmaker 2020 R1.1

Dashboards - 80644

The charts now reflect the correct statistics when multiple records are present in some weeks and single record in some other weeks.

Order Entry | Glass Sales line - 727

The problem with price not getting recalculated (even if it is not frozen) with change of Glass size is now resolved.

Order Entry | Elevations - 786

Selecting a constituent and then deleting or copying was not working correctly when the mouse was moved over other sales lines. This is now corrected.

Manufacturing | Optimization - 3118

The problem with incorrect piece quantity on Cutting List for parts that are "Pair Cut - Intelligently" is now corrected.

Tracking - 1763522

The Tracking Station number in the tracking file name is now 4 characters instead of 2 earlier. The polling station will just look for TRK<SSSS>*.TXT where SSSS is the station number.

Windowmaker 2020 R1

What's New

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

General Enhancements

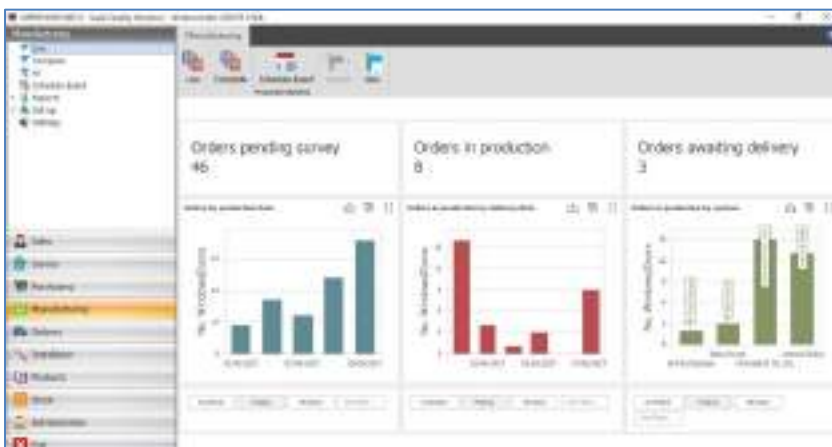
Dashboards

We now have a livelier and more informative Windowmaker main screen. It comes with a dashboard for each department. This makes day-to-day management of the activities much easier and helps you stay focussed.

Benefits:

- ▲ Assist management decision-making with real time, easy to understand data.
- ▲ Export Wide range of management reports.
- ▲ Readily available key metrics to motivate staff and increase productivity.
- ▲ e.g.:
 - o A factory manager can see a daily Windows/Doors count based on production date or delivery date.
 - o A factory manager can make informed decisions regarding staffing levels and overtime.
 - o A business owner can accurately forecast daily and weekly invoice total.
 - o A delivery manager can plan vehicle requirements well in advance, depending on Windows/Doors count per route.
 - o An operations manager can track number of Windows/Doors processed by each employee. This can be used it to motivate staff and increase productivity, set goals and reward good performance.

Note: Currently the dashboards are pre-defined. These will be made user-definable in future.



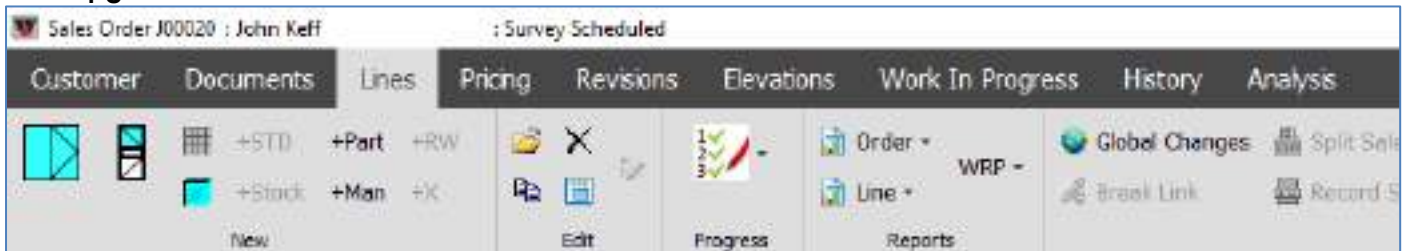
Navigation Controls

The navigation controls of all 'ribbon controls' now have a bigger font to increase readability.

Before Upgrade:



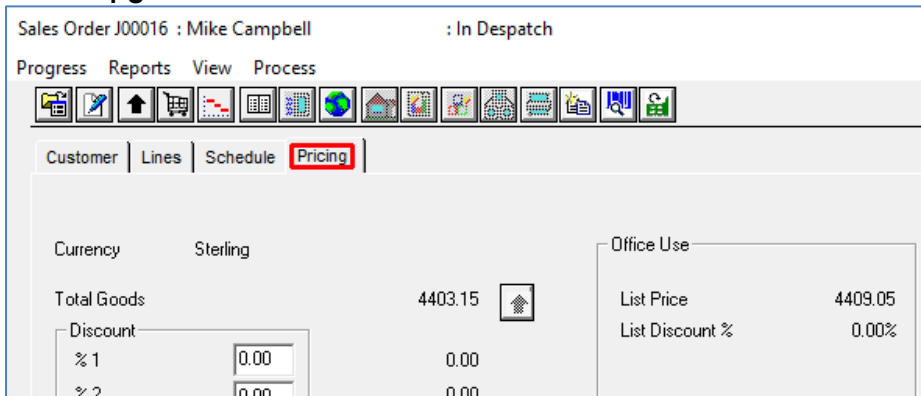
After Upgrade:



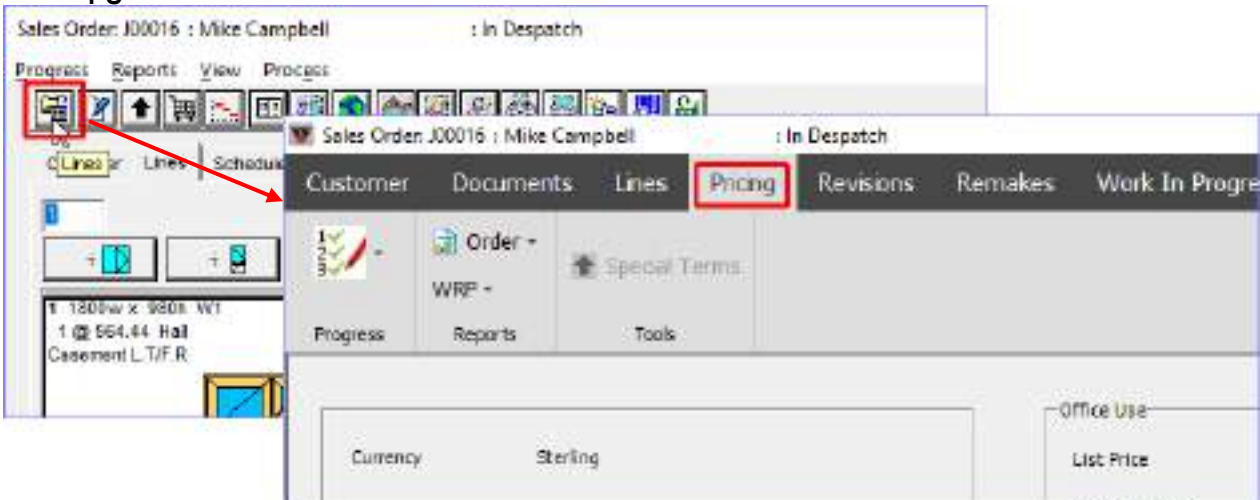
Sales Header-Pricing

The Sales Quote/Order → Pricing page is now moved to the new Sales Header notebook. This is being done as part of using the latest technology to take advantage of the rich features available.

Before Upgrade



After Upgrade



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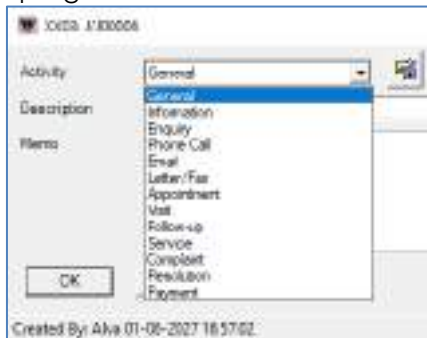
History

In Sales Header list, History of the focussed quote is now displayed in a panel on the right side. It will be visible on the Lines tab of the new Sales Header notebook as well. These panels can be set to auto-hide mode. This makes history information readily available for the respective quote/order, without having to open quote/history records. This also helps to stay up to date on quotes/orders.

Benefits:

- ▲ Empower staff with all the latest information regarding every quote and order.
- ▲ Improve accountability for all actions taken by the fabricator and their customer.
- ▲ Reduce staff workload and increase productivity.
- ▲ Go paperless by attaching handwritten documents.

The program has also been enhanced with more Activity types:

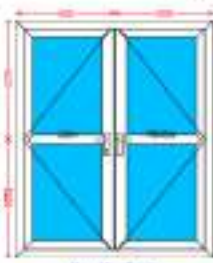


Crystal Reports – Part Images

Reports can now show profile cross-section and fittings images. This helps easily identify correct parts e.g. by operators at the shop floor to pick profiles from racks.

The reports include:

- Production Document
- Load List
- Cutting List
- Cill Cutting Plan
- Specification Summary

Super Quality Windows		Production Document		01-06-2027	
000055 / 0002				Qty 1	
XX01 Stella Angel				D11 Living Room	
System	ER01 Ultimate70 Int. Glz.				
Design	311				
Description	French Door L: R Drive:				
Ref.: D1					
Location: Living Room					
Size : 1800w X 2150h					
					
		[Caption: French Door L: R Drive]			
Description	Stock No.	Qty	Size	Cost	
ER Main profiles					
Outer Frame Large	EW5006W	2	1800w	1/1	
		2	2150h	1/1	
T/M / French Mull	EW5002W	1	2540h	1/1	
Door Sash - Z	EW5018W	4	602w	1/1	
		4	2662h	1/1	
Transoms/Mullion	EW5022W	2	727w	1/1	

Super Quality Windows		Load List		01-06-2027	
Batch: 1/ J00040 01-06-2027		Save station: Profile Saw			
Description	Stock No.	Qty	Size	Sums	
Order J00040	Customer: XX01 Stella Angel				
Order Frame Large	EW5006W			5 x 6003	
Total		22	27000	8	
T/M / French Mull	EW5002W			1 x 2252	
T/M / French Mull	EW5002W			1 x 6003	
Total		2	5497	141	
Transoms/Mullion	EW5022W			1 x 3749	
Total		2	1476	3	
TransMull - Z	EW5002W			1 x 6003	
Total		2	1497	7	
Sash - T (CHN)	EW5006W			4 x 6003	
Total		24	18000	4	
Door T Sash	EW5018W			2 x 6003	
Total		8	11696	2	

Super Quality Windows
17 Brighton Road,
Barnham, Basing,
KT6 5LR, UK

Specification Summary

To:
Stefia Aspel
98b St Paul St,
LONDON,
N1 7DF
UK
Tel: 0451 231352
Email: info@superq.co.uk

Quote No. **Q00650** Customer Ref. Quote Date Sales Person

ER Main profiles

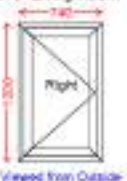
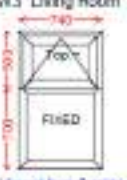
Outer Frame EW5001W	Inner Frame EW5002W	Inner Mull - Z EW5003W	Inner Mull - T EW5005W	Outer Frame Lign EW5006W
Door Sash - Z EW5018W	Door T Sash EW5019W	Outer Frame EW5021W	Transom Mullion EW5022W	

Generic Hardware

Casevent Wedge	Casevent Wedge
Cockspur Wedge	Cockspur Wedge
Door Flag/SD Hinge	FLG-HNG-VIH
First Hinge L 14" SS	FRHSS14-L
First Hinge R 14" SS	FRHSS14-R
First Hinge L 8" SS	FRHSS8-L
First Hinge R 8" SS	FRHSS8-R
FR Door Shootbolt	ShootboltD
Shootbolt Keeper	ShootboltKeep

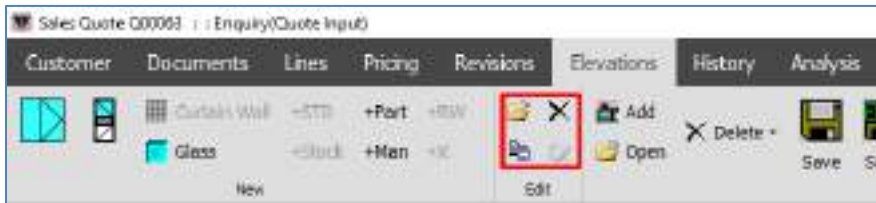
Crystal Reports - Frame Labels

Frame Labels can now be printed on Avery L7163 stationery (14 labels per sheet or corresponding roll) as well. This makes stationery management easier as one can use the same stationery as used for Profile Labels.

J0051/ 0002/ 1 D1 Kitchen  Viewed from Outside XX05 Tom Shah SY04 Int. Glazed Doors Residoor L 950w x 2100h PVC Colour White Outer Frame 72mm Door Z-Sash 112mm 4-12-4 Clear 1/ PB20 /F002 /01 15/07/202 Wed CREF - 0230 U-value 2.70 0000784200100	J0051/ 0004/ 2 W3 Living Room  Viewed from Outside XX05 Tom Shah ER01 Ultimate70 Int. Glz Casement Right 740w x 1200h PVC Colour White Outer Frame 72mm T-Sash (C'mnt) 75mm 4-12-4 Clear 1/ PB20 /F002 /02 15/07/202 Wed CREF - 0230 U-value 2.63 0000784400100
J0051/ 0003/ 1 W2 Bedroom 1  Viewed from Outside XX05 Tom Shah SYHS Horizontal Sliders Horizontal Slider 900w x 1200h PVC Colour White 4-12-4 Clear 1/ PB20 /F002 /03 15/07/202 Wed CREF - 0230 U-value 2.80 0000784300100	J0051/ 0004/ 1 W3 Living Room  Viewed from Outside XX05 Tom Shah ER01 Ultimate70 Int. Glz T-OFF 740w x 1200h PVC Colour White Outer Frame 72mm T-Sash (C'mnt) 75mm 4-12-4 Clear 1/ PB20 /F002 /04 15/07/202 Wed CREF - 0230 U-value 2.69 0000784400100

Elevations

The program now allows to 'Copy' and 'Delete' Sales Lines from the Elevations page. This makes order entry faster. Earlier, these were only possible from the Lines page.

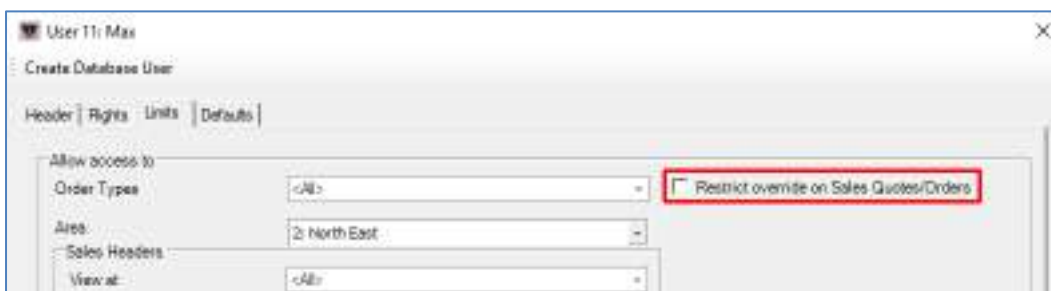


User Rights

A new User Right "Restrict override on Sales Quotes/Orders" for Order Types is now available. Selecting this disables the Order Type at following places for the user:

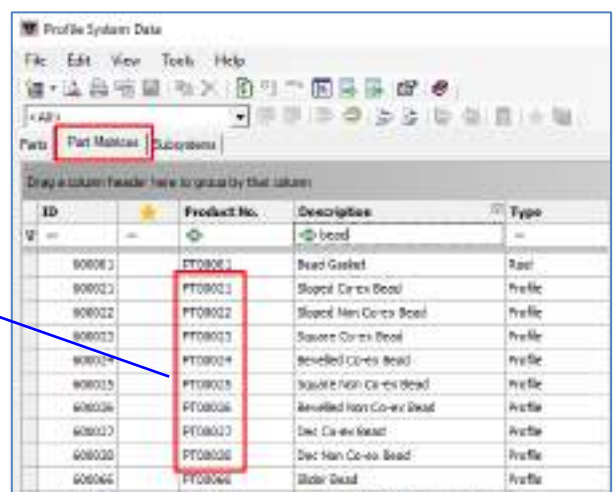
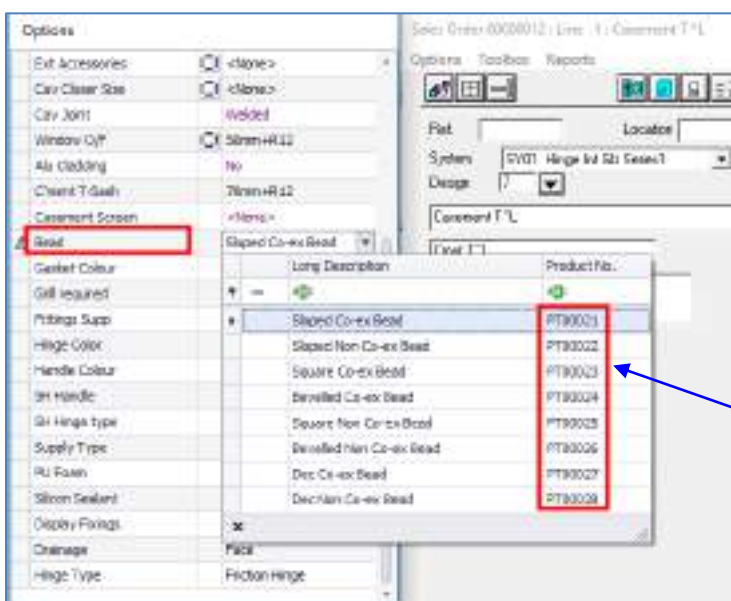
- Sales Quote/Order | Customer page
- Sales Quote/Order | Pricing page: Special Terms
- Creating Remake line

This helps to prevent sales staff changing the order type to an inappropriate one (with a lower mark-up %) in a bid to reduce the order value.



Part Filter Option Answers

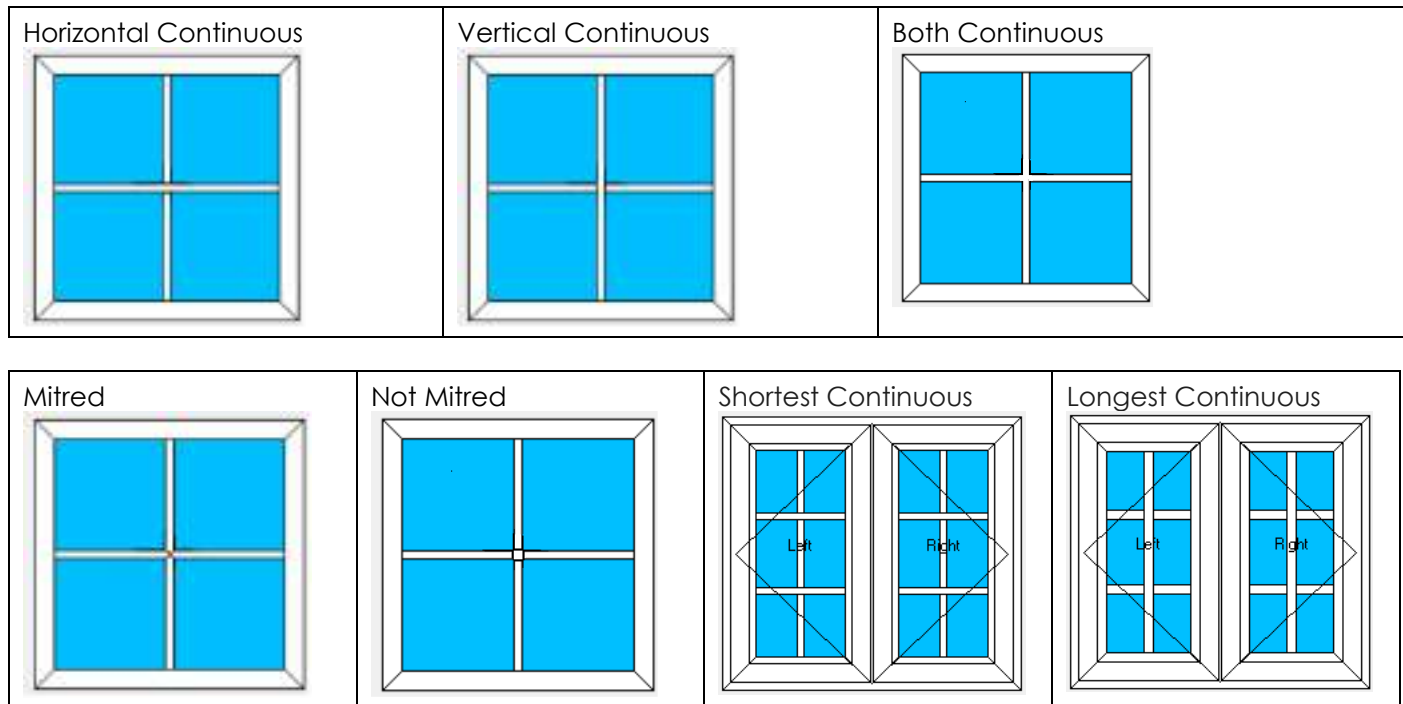
Part Matrices can now be answers to Options of type 'Profiles (Part Filter)' and 'Unit (Part Filter)'. Such Part Matrices can also be set as 'Favourites'. This makes data set-up simpler e.g. for beads, espags, friction stays, strikers etc.



Enhancement to Options

Georgian

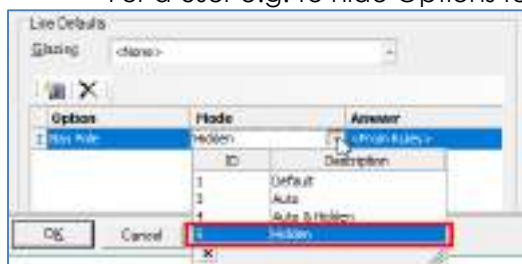
Sales Line graphics now show appropriate graphics to reflect selected crucifix type of Georgian bars. This helps to accurately convey the continuity of Georgians to customers. It also makes manufacturing easier.



Customer Special Terms

Options can now be set as 'Hidden':

- For a Customer e.g. to hide some Options for a dealer.
- For a User e.g. to hide Options for sales users, that are only relevant to production.



Commercial Orders, Surveying

Record Survey Sizes dialog now displays the property Location (Area/Floor/ID). This makes identifying Sales Lines easier.

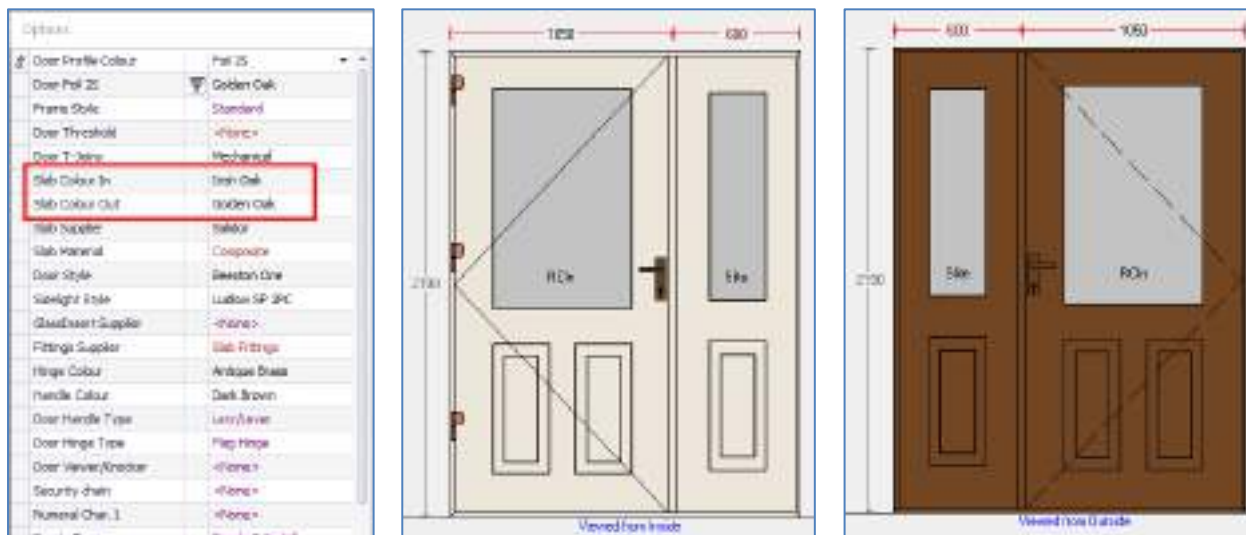


Remakes, Production Scheduling

Remake lines can now be scheduled even if production bottleneck BOM lines are not included. A new setting "Ignore capacity requirement of Remakes for production scheduling" is provided for this. However, if bottlenecks are selected, they will be considered while calculating capacity requirements.

Entrance Doors

It is now possible to have separate Door Slab finish for inside and outside.



Dealer Client, Revisions

Revisions and Elevations features are now available in Windowmaker Dealer Client.

Link to Working Centre (Windowmaker 2020 R1 SP2)

Windowmaker can now generate link to working centre files (*.WMW) for reinforcements as well.

Link to Welder

Windowmaker now links to Sturtz Toast Rack Buffer.

Enhancement to Products

Windowmaker Lite (Windowmaker 2020 R1 SP2)

Un-dongled Windowmaker Lite now allows enhanced storage capacity for sales quotes/orders:

Program Level	Max. No. Quotes/Orders	
	Before upgrade	After upgrade
Base version (free)	1	5
Storage Level 1	5	50
Storage Level 2	50	250
Storage Level 3	250	500

Breaking Changes

This section lists important behaviour changes, which are introduced in this version. These must be read in order to understand how they might affect your installation & upgrade process.

General

SQL Server 2008 R2

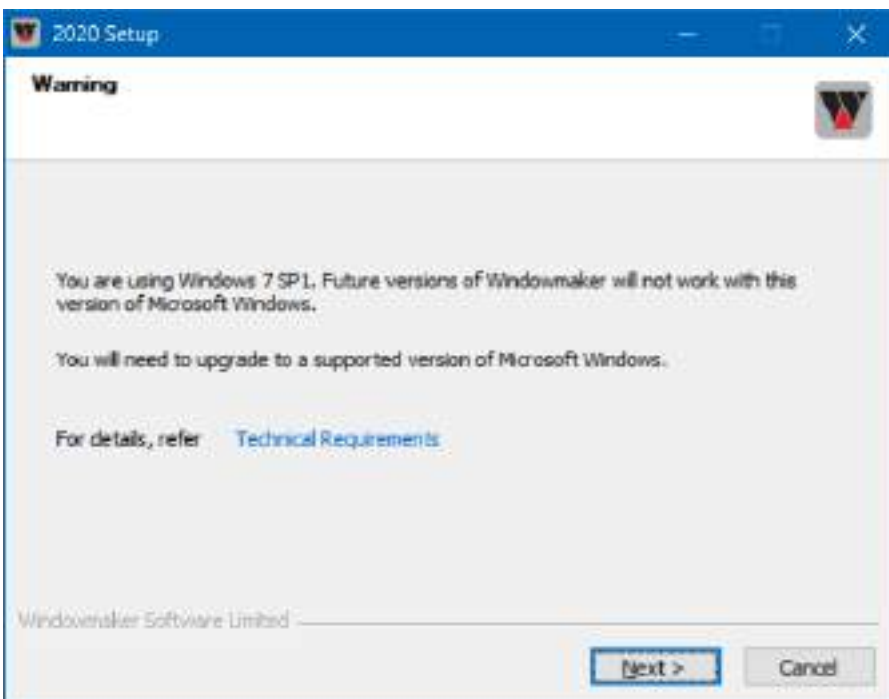
Microsoft has deprecated support to SQL Server/Express 2008 R2. Windowmaker products will stop supporting this in near future. Therefore, we recommend upgrading to the latest SQL version at the earliest. If Windowmaker is run on this server, a warning message to this effect will be displayed at start-up and at every 30 minutes, for Senior Manager and SUPERVISOR users.



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

Windows 7 SP1, Windows Server 2008, Windows Server 2008 R2 Operating Systems

Microsoft has deprecated support to Windows 7 SP1, Windows Server 2008 and Windows Server 2008 R2 Operating Systems. Windowmaker products will stop supporting these in near future. Therefore, we recommend upgrading to the latest operating system at the earliest. A warning message to this effect will be displayed while installing Windowmaker on these operating systems. e.g.:



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

Crystal Reports – Purchase Order, Purchase Order (Entrance Doors), Glass Order

These reports now have a new format consistent with other Windowmaker reports. This improves the readability of the report.

Super Quality Windows
 17 Brighton Road,
 Surbiton, Surrey,
 KT6 5LR, UK



Purchase Order

To		Deliver to	
Clevedon Glass Unit 4 Tweed Road Industrial Estate Clevedon Avon BS21 6RR		17 Brighton Road, Surbiton, Surrey, KT6 5LR UK	

P.O. No.	Order Ref.	Order Date	Due Date
P00005	J00036	01-06-2027	31-05-2027

Order/ Sales Line	Position	Reference	Location	Size	Qty
4-20-4 Clr Tuff K					
J00036/ 0003	X->	JG.A1/1	D03	Garden	811w x 1859h
J00036/ 0003	<-X	JG.B1/2	D03	Garden	811w x 1859h
J00036/ 0003	X->	JG.C1/3	D03	Garden	810w x 1859h
J00036/ 0003	<-X	JG.D1/4	D03	Garden	810w x 1859h
J00036/ 0009	X->	JG.A1/1	D04	Balcony	785w x 1859h
J00036/ 0009	<-X	JG.B1/2	D04	Balcony	785w x 1859h
J00036/ 0009	X->	JG.C1/3	D04	Balcony	785w x 1859h
J00036/ 0009	<-X	JG.D1/4	D04	Balcony	785w x 1859h
J00036/ 0004	X->	JG.A1/1	D03	Dining Area	773w x 1859h
J00036/ 0004	<-X	JG.B1/2	D03	Dining Area	773w x 1859h
J00036/ 0004	X->	JG.C1/3	D03	Dining Area	773w x 1859h
J00036/ 0004	<-X	JG.D1/4	D03	Dining Area	773w x 1859h
J00036/ 0002	FIR	JG.A1/1	D03	Bedroom 1 & 2	764w x 2170h
J00036/ 0002	RIR	JG.B1/2	D03	Bedroom 1 & 2	764w x 2170h
J00036/ 0002	FIR	JG.C1/3	D03	Bedroom 1 & 2	764w x 2170h
J00036/ 0001	FIR	JG.A1/1	D03	Bedroom 1 & 2	764w x 2170h
J00036/ 0001	RIR	JG.B1/2	D03	Bedroom 1 & 2	764w x 2170h
J00036/ 0001	FIR	JG.C1/3	D03	Bedroom 1 & 2	764w x 2170h

18

Database Schema Changes

New database tables/views:

Name	Remarks
Tables	
WMProductMappingTable	For a part this will store the filter criteria specified on it. There will be a row per criterion.
Views	
BAT-WM_NOrdersAtInproduction(762)	Manufacturing Dashboard
BAT-WM_NOrdersAwaitingDelivery(763)	
BAT-WM_NOrdersByProduction(758)	
BAT-WM_NOrdersInproduction(757)	
BAT-WM_NOrdersInproductionBySystem(759)	
BAT-WM_NOrdersPendingSurvey(764)	
DEL-WM_NLiveDeliveries(765)	Delivery Dashboard
DEL-WM_NOrdersInDespatch(766)	
DEL-WM_NOrdersInDespatchByDeliveryDate(767)	
DEL-WM_NOrdersInDespatchByRoute(768)	
DEL-WM_NOrdersInProduction(762)	
DEL-WM_NOverdueOrders(769)	
DEL-WM_NSiteFilter(29)	
DEL-WM_NRouteFilter(513)	

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INS-WM_NOrdersByStatus(748)	Installation Dashboard
INS-WM_NOrdersNotYetScheduledForInstallation(754)	
INS-WM_NOrdersToBeInstalled(753)	
CUS-WM_NLiveCustomers(743)	Sales Dashboard
CUS-WM_NTopNCustomers(746)_Rb	
ORD-WM_NQuotesByStatus(744)_Rb	
ORD-WM_NSalesByWeek(747)_Rb	
ORD-WM_NSalesOrderCount(742)	
ORD-WM_NSalesQuoteCount(741)	
ORD-WM_NValidOwnerList	
ORD-WM_NSalesByDesign(774)_Rb	Product Dashboard
ORD-WM_NSalesBySystem(773)_Rb	
PUR-WM_NPurchaseBackOrder(780)_Rb	Purchase Dashboard
PUR-WM_NPurchasesDue(777)_Rb	
PUR-WM_NPurchasesLive(778)_Rb	
STK-WM_NStockConsumption(760)	Stock Dashboard
STK-WM_NStockToReorder(761)	
SUR-WM_NOrdersByStatus(748)	Survey Dashboard
SUR-WM_NOrdersNotYetScheduledForSurvey(752)	
SUR-WM_NOrdersToBeSurveyed(750)	

New Indexes:

Table Name	Index Name	Columns
WMSaleslineTable	idxWMSalesLineTable_3	[StatusID] ASC, [SiteID] ASC, [SalesHeaderID] ASC
WMProduct	idxWMProduct_4	[ProductID] ASC, [CatalogHeaderID] ASC, [ProductType] ASC, [ProductNo] ASC
WMUser	idxWMUser_3	[UserID] ASC, [UserID] ASC, [AreaID] ASC

Other changes specific to each table are as listed below:

Table	Column	Change
WMProduct	CostheadID	Added

Issues Fixed

Windowmaker 2020 R1 SP2

Order Entry | Manual Sales Line – 1054

The problem with Manual Sales Line becoming non-editable if there was a "*" in the description is now corrected.

Order Entry | Remakes - 850

The issue in Remake Sales lines not listing individual components of Composite Profiles is now corrected. These can now be selected from the list of components.

Sales Client | Synchronization – 1952

The problem with first time synchronization failing when data at central server is created with 'First Use' is now resolved.

Setup | Parts - 963

It is now possible for Windowmaker Lite users to setup Finish Costs. This is mainly useful for Aluminium profiles. This was not allowed earlier even if the 'Costing, Pricing' option was available to the user.

Windowmaker 2020 R1 SP1

Setup | Prices matrices - 2080899

Price Matrices were corrupted on upgrading to Wm2020 R1. This is now fixed.

Order Entry | Sales Line | Wall Pane type - 2079830

It will now always be possible to have a WALL pane type at the bottom in a Sales line where there is a T-join of Couplers.

Order Entry | Elevations - 2080772

The problem with the hovering of the mouse also changing the selection of the sales lines on the Wallchart on Elevation tab is now fixed. This earlier caused difficulty in deleting the desired sales lines from this view as the selection kept changing with the mouse movement.

Windowmaker 2020 R1

Order Entry | Remakes - 2080141

Grids in Georgian glass were calculated incorrectly in Remakes. This is now rectified.

Order Entry | Dimensions | Equalise Glass- 2080470

Multi-frame sales line with equalised Glass dimensions did not actually calculate the correct equalised sizes. However, on re-opening the Sales line, the dimensions would get changed leading to mistakes in ordering glass. This is now corrected to calculate and display the correct sizes the first time itself.

Order Entry | Sales Headers | Reports | Documents - 2079370

The Header information such as Quote/Order No., Date and other details not printing on all the pages of documents such as Quotation, Order Acknowledgement and Invoice when footer texts spanned across multiple pages is now rectified.

Order Entry | Sales Lines | Combination Pane Types – 2079663

The problem with the Program displaying the 'Check BOM' warning for certain combination pane types incorrectly is now resolved.

Order Entry | Sales Lines - 2078811

An order which was processed in batch can be edited, erasing the Production data without warning the user. This is now rectified by providing a proper warning so that user may not accidentally delete it.

Products | Systems | Rules - 2080545

The negative values in the range of a Size type option could not be specified correctly in Rules condition. This is now corrected.

Products | Systems | Rules - 1977237

If a GoSub/GoTo rule pointed at a corrupt rule and 'Compact' was performed, some other rule took the position of the corrupt rule, totally modifying the GoSub/Goto rule. This caused the Sales line B.O.M to get changed. This is now corrected so that the corrupt rule is eliminated and the GoSub/GoTo rule now points to no rule. The Sales line therefore remains unaffected by the compacting of the rules.

Products | Setup | Costheads – 1868998

The problem with "Supplier Discount %" column on the Costhead not displaying values with the correct decimal places on some machines when "Export" or "Search" operation was performed is now resolved.

Windowmaker 2020

What's New

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

New Products

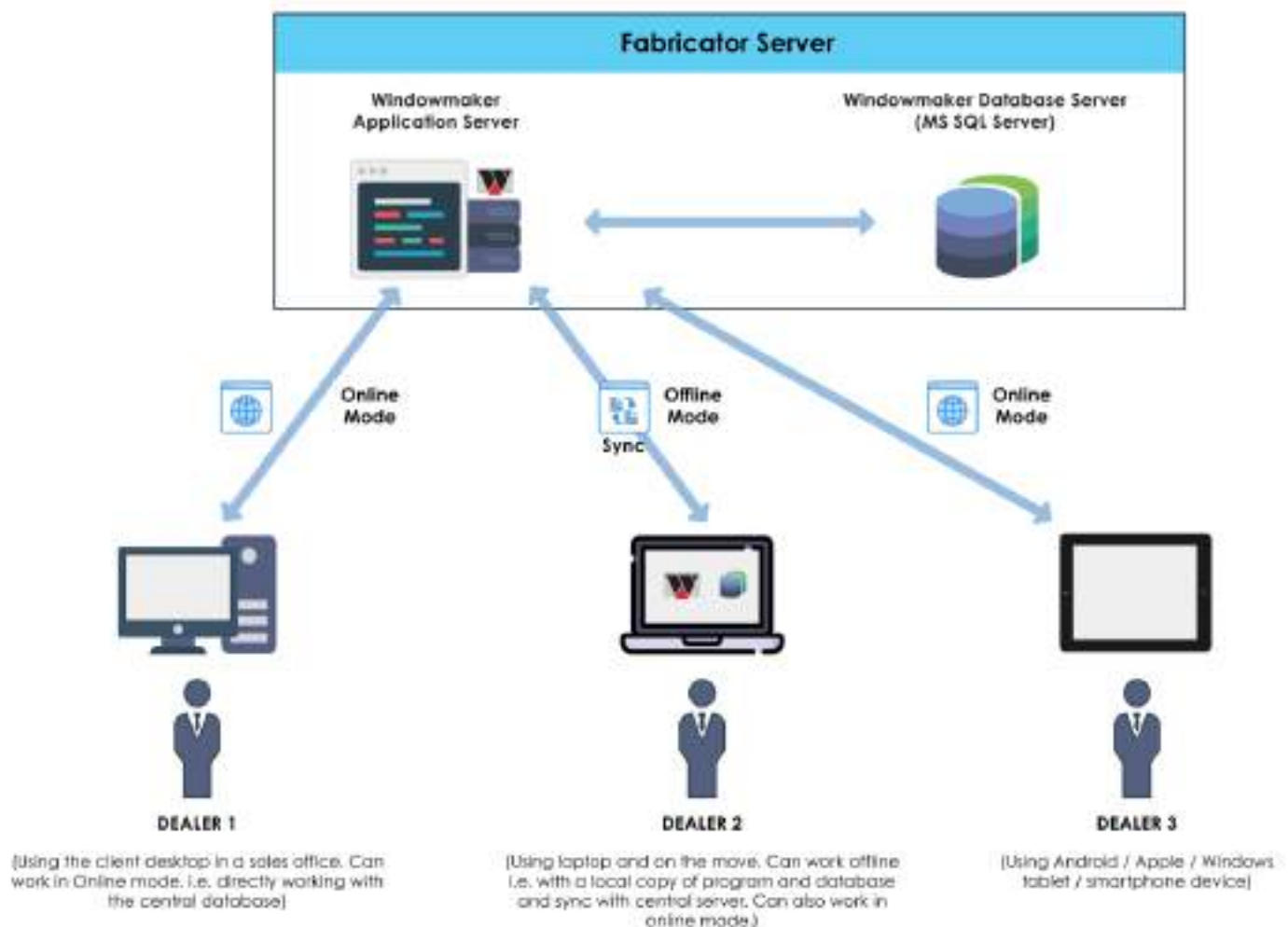
Windowmaker Dealer Client

A complete package for manufacturers and their dealers.

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

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

Windowmaker Dealer Client Implementation



Windowmaker 2020 Version 8.x

Release Document



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

Benefits for Manufacturers

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

Benefits for Dealers

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

General Enhancements

SQL Server 2019 for Windowmaker

Windowmaker is now supported to work with SQL Server 2019.

Reports - Customer Documents

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

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



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

- Quotation
- Order Acknowledgement
- Invoice
- Specification Summary

WM Windows
2245 Green Avenue
Liverpool
United Kingdom



Quotation

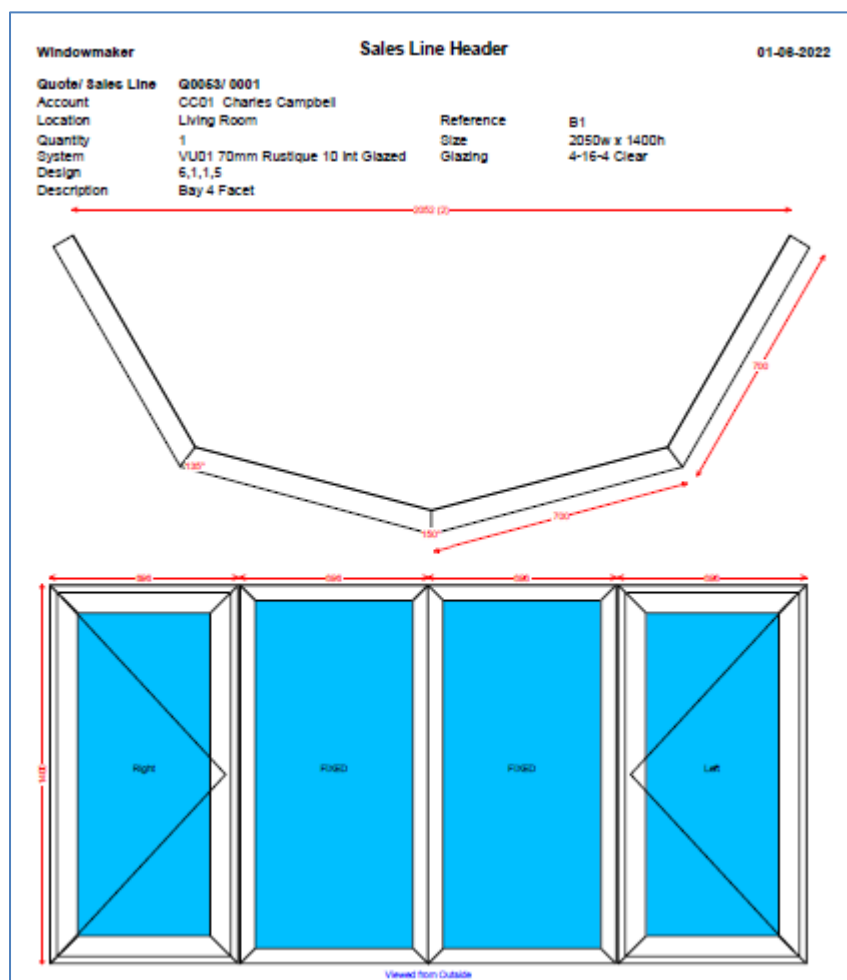
To:	Deliver to:
Nelson Builders 111, The Crescent Birmingham Business Park 1 Salford UK B37 7YD Tel: 07584 277 254 Email: nsa@nelsonbuilders.com	111, The Crescent Birmingham Business Park 1 Salford UK B37 7YD

Quote No.	Customer Ref.	Quote Date	Sales Person
Q0040	RD001	6/1/2022	Chris #44-1645329102 chris@windowmaker.com

Dear Mr. Russ,
Thank you for giving my company the opportunity to provide you with the following quotation. We have been installing windows and doors for over 10 years.

Report - Sales Line Header

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



New Report - Requirements Summary (Export to Excel)

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

Requirements Summary								01-06-2022
1	Windowmaker							
2	Order J0058	ML01 Mr. Mark Lydford						
	Description	Stock No.	Qty	Size	Unit	Rate	Cost	Weight
4	Gaskets							
5	Mech joint Gasket	106411	4	21,648.0000	mm	2.10	45.92	0.000
6	L&S Corner Seal	WM_LSCORNERSEAL	1	14,860.0000	mm	2.10	31.52	0.000
7	L&S Interlock Seal	WM_LSINTSEAL	1	3,850.0000	mm	2.10	8.17	0.000
8	L&S Brush Seal	WM_LSSEAL	1	3,850.0000	mm	1.90	7.39	0.000
9	Generic Hardware							
10	BogieCarton 150	WM_BogCarton150	2		pcs	4.48	8.96	0.000
11	BogiePacker 16mmTh	WM_BogiePacker16	2		pcs	5.35	10.70	0.000
12	Butt Hinge(2D)	WM_BUTTHNGWH	4		pcs	6.20	24.80	0.000
13	Casement Wedge	WM_CasementWedge	4		pcs	5.16	20.64	0.000

New Report - Orders Status Summary

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

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

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

Orders Status Summary												01-06-2022
Ordered				Production				Delivery				
Order No.	Date	Customer	Qty / Frames	Order No.	Date	Customer	Qty / Frames	Order No.	Date	Customer	Qty / Frames	
J0038	16-05-2022	Ardent Windows	70 / 70	J0051	25-05-2022	Prime Windows	12 / 12	J0038	24-05-2022	Ardent Windows	12 / 12	
J0644	11-05-2022	Ardent Windows	25 / 25	J0052	26-05-2022	Ardent Windows	12 / 12	J0053	15-05-2022	Ardent Windows	5 / 7	
J0647	10-05-2022	Nelson Builders	4 / 4	J0042	13-05-2022	John Smith	5 / 5	J0054	07-05-2022	Mr. Mark Lydford	8 / 9	
J0648	07-05-2022	Mr. Robert Redington	14 / 14	J0043	10-05-2022	Affon Green Ltd	4 / 4	J0048	01-05-2022	Nelson Builders	4 / 4	
J0658	05-05-2022	Mr. Mark Lydford	4 / 5	J0045	13-05-2022	Affon Green Ltd	1 / 1	J0051	29-04-2022	Chambers Fisher	9 / 9	
J0659	01-05-2022	Jade Clements	10 / 22	J0055	10-05-2022	Internal Customer	57 / 71	J0054	25-04-2022	Emma Phillips	30 / 32	
J0660	27-07-2022	Maddison Baxter	18 / 24	J0019	09-05-2022	A.B. Company Ltd	3 / 3	J0068	18-04-2022	David Murray	21 / 25	
J0662	24-07-2022	Emma Phillips	15 / 15	RMD00001		ABG Windows	2 / 2	J0048	11-04-2022	Ardent Windows	16 / 16	
J0663	22-07-2022	Maddison Baxter	15 / 17	RMD00002		ABG Windows	1 / 1					
J0665	16-07-2022	Charlotte Fisher	20 / 16	RMD00003		ABG Windows	1 / 1					
J0667	10-07-2022	Johnnie Moulden	21 / 21									
J0668	06-07-2022	Zoe Fox	14 / 14									
J0669	03-07-2022	Katharine Benson	15 / 15									
J0670	01-07-2022	Anthony Fletcher	17 / 19									
J0671	29-06-2022	Charles Campbell	22 / 26									
PJ150001	23-06-2022	Nelson Builders	4 / 4									
PJ1701	22-06-2022	Affon Green Ltd	12 / 12									
PJ1702	20-06-2022	Affon Green Ltd	9 / 9									
PJ180001	12-06-2022	Nelson Builders	10 / 10									
PJ180002	10-06-2022	Nelson Builders	18 / 16									
G0047	01-06-2022	Affon Green Ltd	4 / 4									
Grand Total			363 / 397				98 / 112				128 / 106	

New Report - Delivery Notes

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

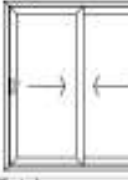
Windowmaker
2nd Floor, Kalapi Avenue
20 Punt Nagar
Old Padra Road
Vadodra - 390 015



Delivery Notes

Deliver to
Mr. Mark Lydford
48 Pinhurst Road
West Moors
Dorset
BH22 0AP
UK
Tel: 01536 502 800
Email: mark@95@yahoo.co.uk

Order No.	Delivery Date	Sales Person
J0058	01-06-2022	SUPERVISOR

Sales Line	Details	Qty
0001	 W1 Kitchen 610w x 864h 70mm Rustique 10 Int Glazed Casement R Cmmt R 4-16-4 Clear 3mm Square Leads Colour Foil 2S Handle Colour Hinge Colour Foil 2S Golden Oak on Caramel White White	2
0002	 W2 Hall 1778w x 914h Super System Bay 3 Facet 4-20-4 Clear Low E Colour Foil 2S Handle Colour Foil 2S Golden Oak on Caramel White	1
0003	 D1 Lounge 1825w x 2057h Imagine Patio Door 2T XIX_ 2T XIX_ 4-20-4 Clear Low E Colour Foil 2S Handle Colour Foil 2S Golden Oak on Caramel White	1
Total		4

Customer

Name: _____ Signature: _____ Date: _____

New Report - Installation Material

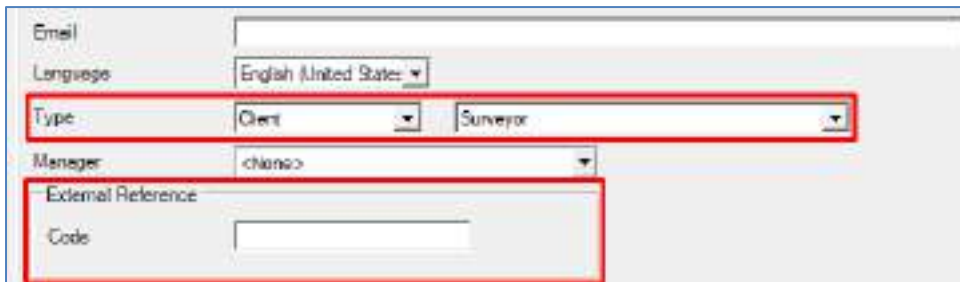
This report prints the summary of material required for installation.

Windowmaker		Installation Material		01-06-2022		
Order J0053		RT0048 Mr. Mark Lydford				
Description	Stock No.	Qty	Size	Unit	Cost	Weight (kg)
Inst. Material						
Foam/Backer Rod	WM_BackerRod	40	59580	mm	29.82	0.000
Drainage	WM_Cap-WH	26		pcs	0.00	0.000
Fastner Cap	WM_FastnerCap	160		pcs	32.00	0.000
Install. Screw 8"100	WM_FScrew8x100	160		pcs	16.00	0.000
Mask Tape	WM_MaskTape	40	59580	mm	29.82	0.000
PU Foam	WM_PUFoam	40	59580	mm	119.22	0.000
Silicon Sealant	WM_Silicon	40	119160	mm	333.68	0.000

Users

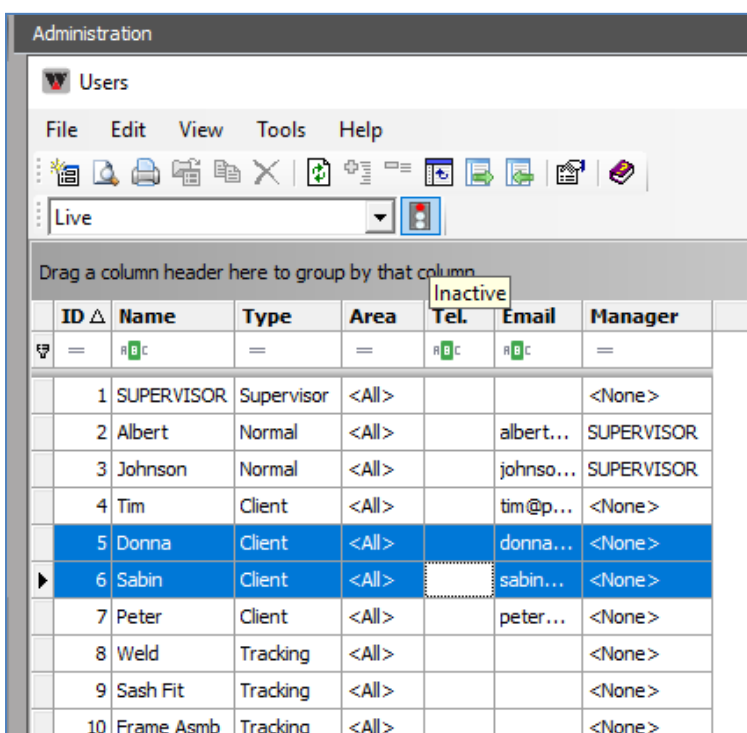
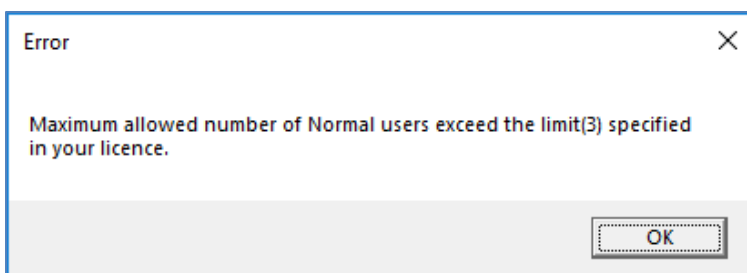
The program now allows an External Reference Code to be added to all Users of type Client – Order Entry, Surveyor & Installer. This was already available for Sales Rep. Clients.

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



Named Users

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



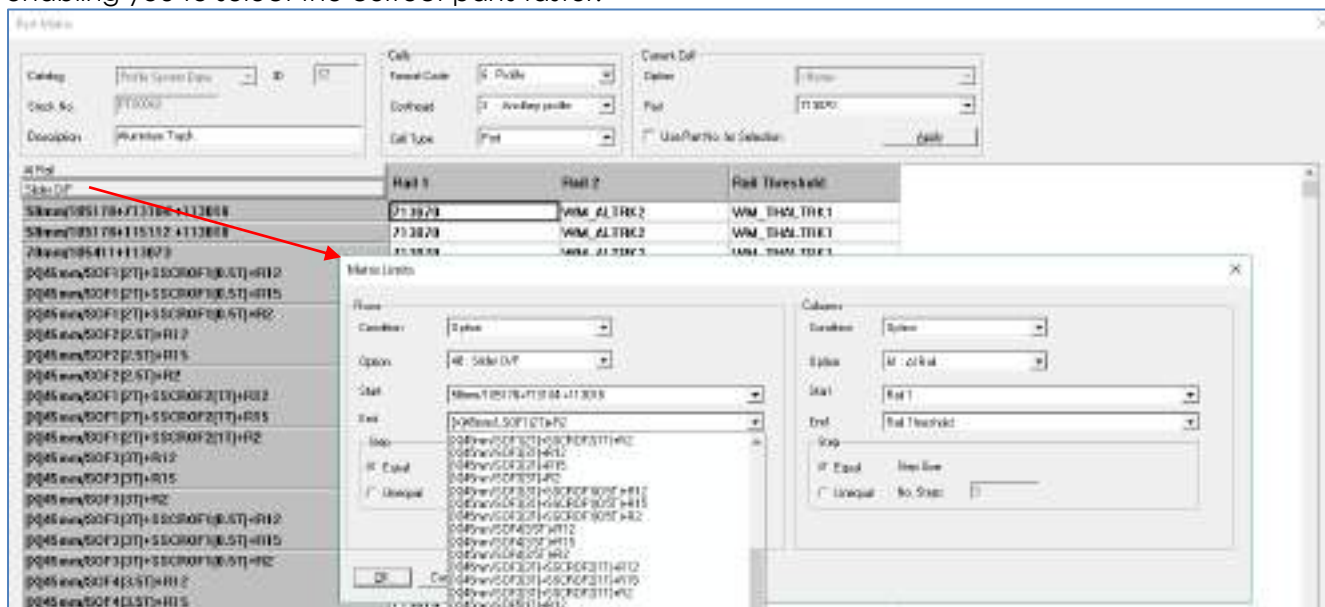
ID	Name	Type	Area	Tel.	Email	Manager
1	SUPERVISOR	Supervisor	<All>			<None>
2	Albert	Normal	<All>		albert...	SUPERVISOR
3	Johnson	Normal	<All>		johnso...	SUPERVISOR
4	Tim	Client	<All>		tim@p...	<None>
5	Donna	Client	<All>		donna...	<None>
6	Sabin	Client	<All>		sabin...	<None>
7	Peter	Client	<All>		peter...	<None>
8	Weld	Tracking	<All>			<None>
9	Sash Fit	Tracking	<All>			<None>
10	Frame Asmb	Tracking	<All>			<None>

Part Matrices

Part Matrices have been enhanced to show:

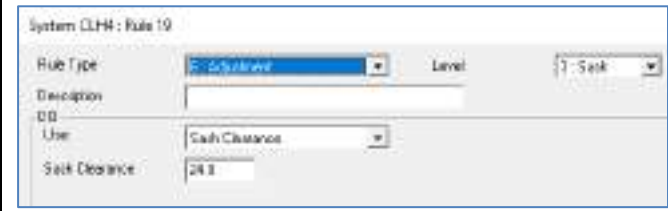
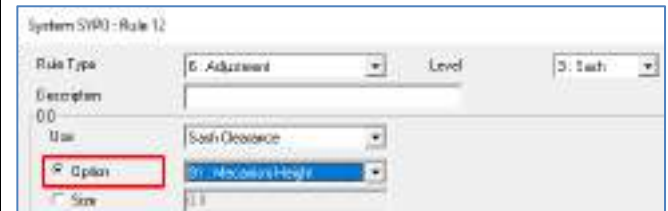
- Long Description of Option Answers for indices instead of Short Description or Product No.
- Product No. without truncating, by increasing cell widths
- Long Description in Start and End fields in Matrix Limits dialog
- Long Description in exported CSV files instead of Short Description

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



Rules - Adjustments

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

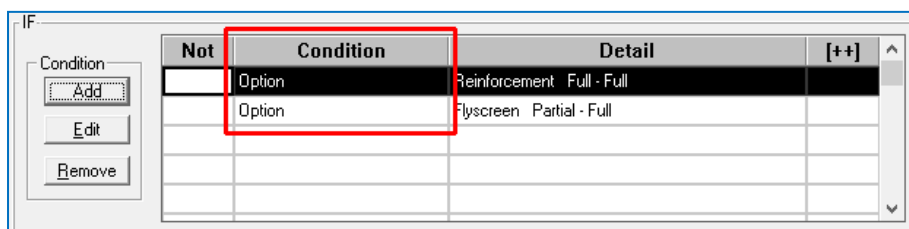
Before Upgrade	After Upgrade
	

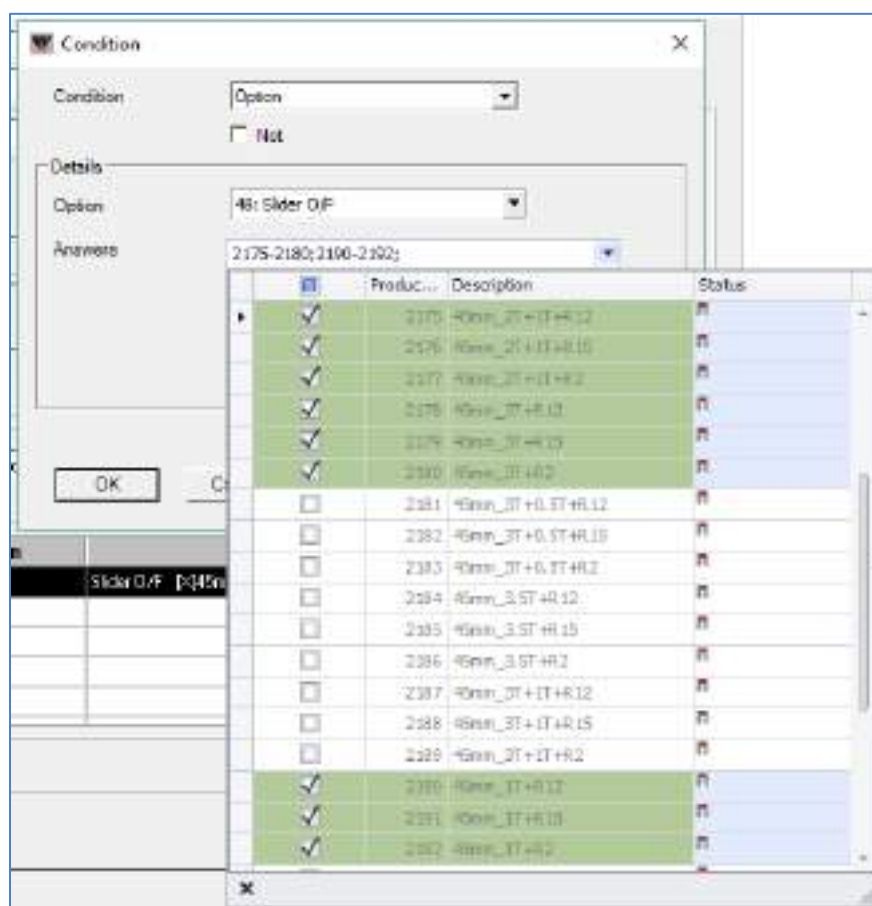
Rules - Conditions

The program now allows you to set up rules with:

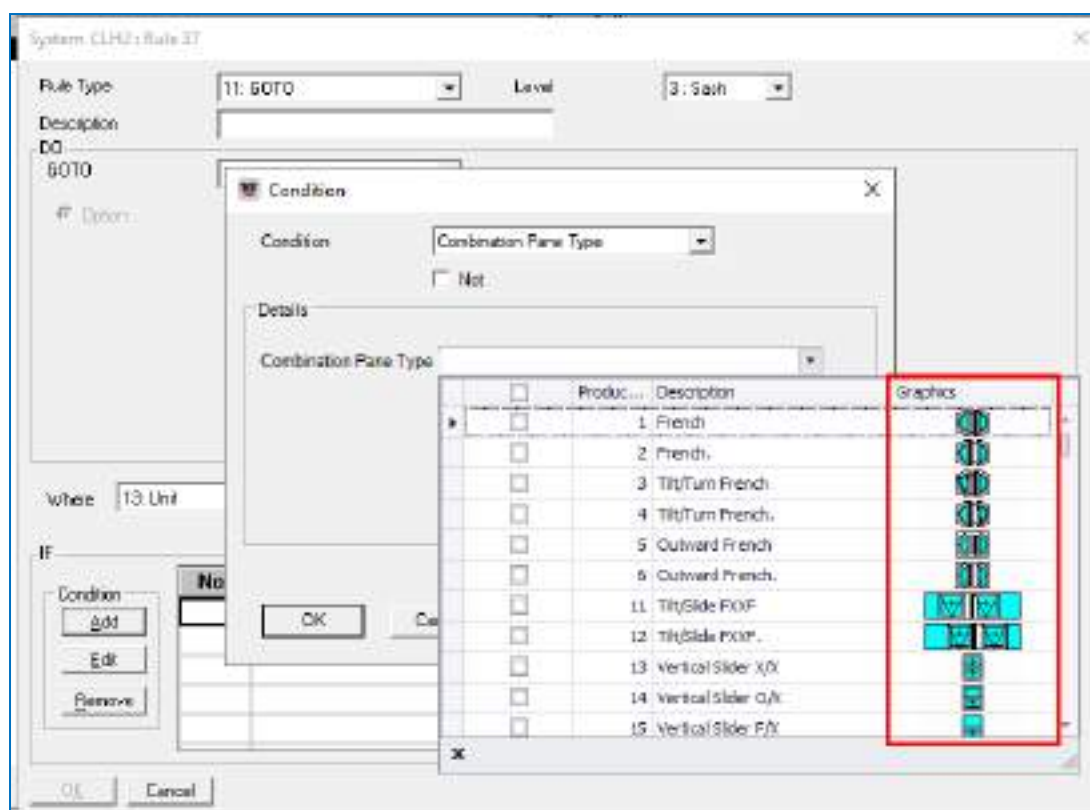
- More than one condition of the same type
- Multiple discontinuous answers within the same condition

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





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



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Application Settings – B.O.M. Sizes

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

Before Upgrade	After Upgrade

Enhancement to Options

Revisions

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

Review Price Changes (R4 and R3)									
Reference	Location	System	Line	Description	Size	Quantity	Base Price		
							☒	R4	R3
W1	Dining Room	ALSS	0001	LTurn.RTurn	39.3750 x ...	1	☒	120.59	124.77
D1	Living Room	ALSS	0002	2T XIX_	78.7500 x ...	1	☒	190.64	177.17

Reusable Offcuts

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

Before Upgrade	After Upgrade

Entrance Doors

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

WM Windows
2245 Green Avenue
Liverpool
United Kingdom



Purchase Order

To					Deliver to	
Novatech 27 Overton Circle, LIVERPOOL , UK - L3 8FH						
P.O. No.		Order Ref.		Order Date		Due Date
PO00221		J0049		01-Jun-22		10-Jun-22
Order/ Line	Position	Ref.	Location	Specification	Qty	Amount
J0049/ 0001	1/S.A1			90-063-015-001/ N1200 - SMOOTH ORLEANS FG 30"x58"	1	132.80
				Door Handle Type Levers/Lever		
				Door Backset 2 3/8		
				Door Cylinder Standard		
				Hinges/Lock Positions Slab supplier standard		
				Lock Block Height 1016		
				10-310-057-001 STAIN GL MISTRAL 22x48 LOWE ARGON	1	818.00
				WM_BKST1 2 3/8 Backset Espag	1	5.00
				20 Fire Rating 20 min Fire Rating	1	6.00
J0049/ 0001	2/G.A1			90-072-169-001/ N1200 - SMOOTH ORL/RM FG 1'0"x58"	1	97.60
				10-310-017-001 STAIN GL MISTRAL 8x48 LOWE ARGON	1	402.00
				20 Fire Rating 20 min Fire Rating	1	8.00
Total						1,267.40
Discount 20.00%						253.48
Grand Total						1,013.92

Tracking

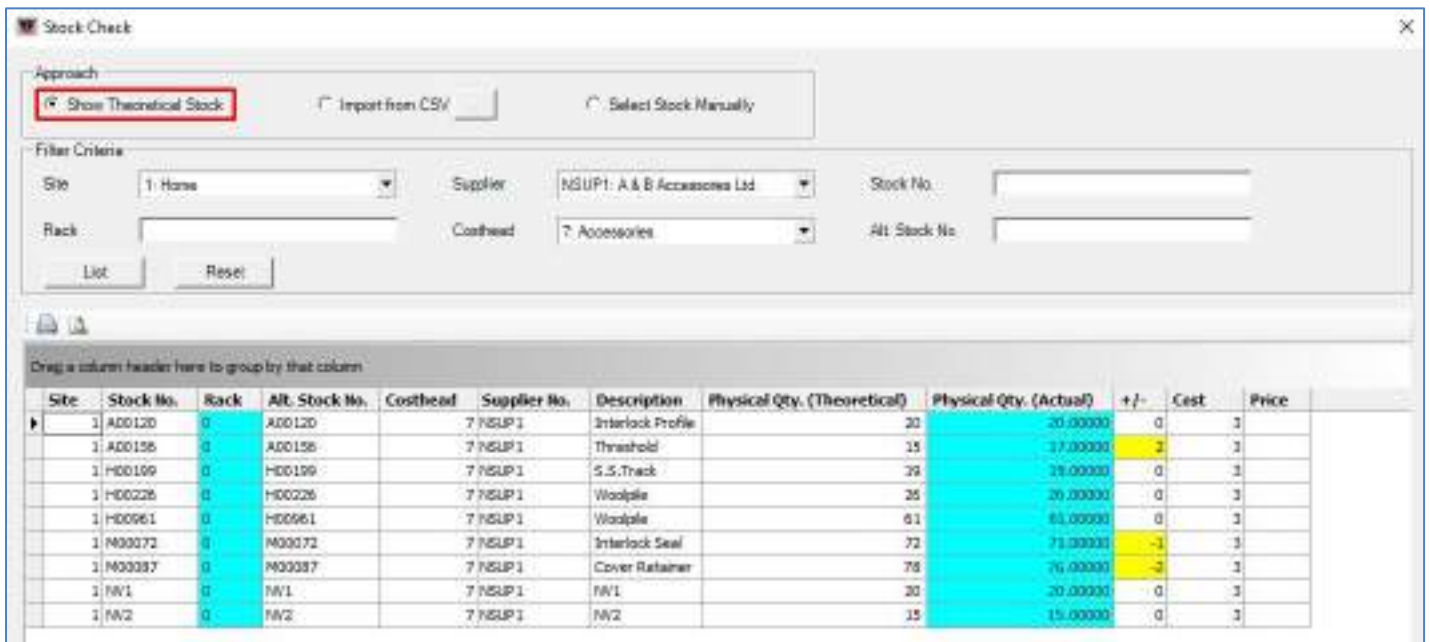
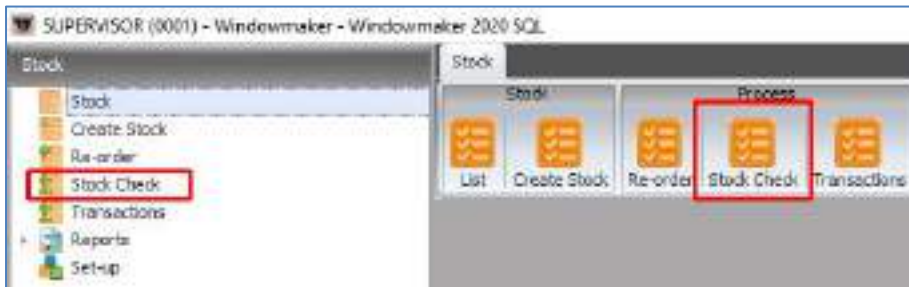
The program now generates unique barcodes for profiles calculated using rules with "Don't affect Adjustments" set. Link to Saws/Machining Centres that use Windowmaker barcode can handle operations for these profiles.

Stock Control

Windowmaker has made periodic stock reconciliation much easier.

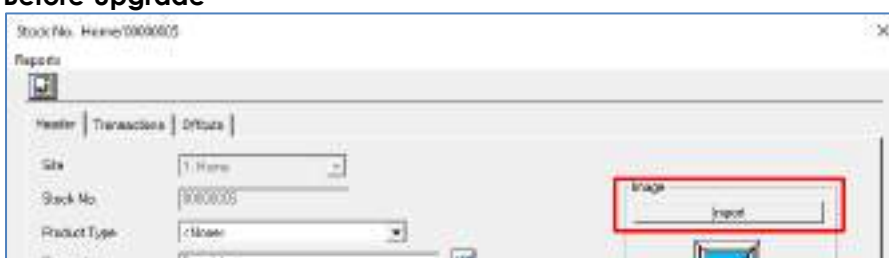
- Show Theoretical Stock: This lists the stocks in the same sequence as the Theoretical Stock report. This makes it easy to enter the actual quantities noted down on the printed Theoretical Stock report.
- Import from CSV: When changes are done in an external Stock Control system, updated details can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

Relevant Adjustment transactions are automatically posted by the program.



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

Before Upgrade

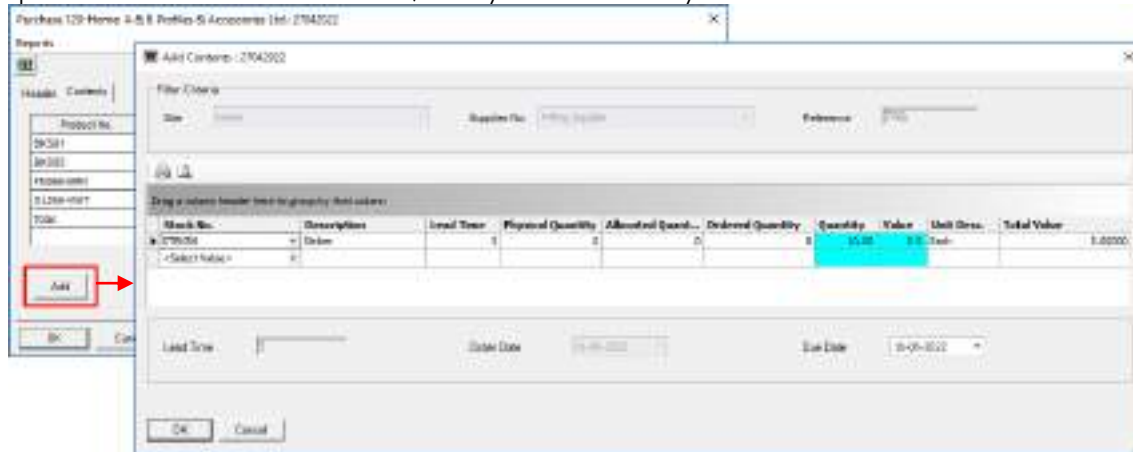


After Upgrade



Stock Control & Purchase Ordering

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



New Options

Machining Instructions

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

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

Windowmaker		Machining Instructions				3/25/2020	
Batch 1/J00140 3/11/2020		Station DI Drain in					
Slot	Position	Size	Cut	Profile	Offset		
Operation DI012901							
6	F_A	1006 ±	U	12601W-White Zendow Frame L 44mm	183 (823)		
					823 (183)		
7	F_A	1006 ±	U	12601W-White Zendow Frame L 44mm	183 (823)		
					823 (183)		
8	F_A	1006 ±	U	12601W-White Zendow Frame L 44mm	183 (823)		
					823 (183)		
9	F_A	1006 ±	U	12601W-White Zendow Frame L 44mm	183 (823)		
					823 (183)		
10	F_A	1006 ±	U	12601W-White Zendow Frame L 44mm	183 (823)		
					823 (183)		

Windowmaker		Machining Instructions				3/20/2020	
Batch 1/J00140 3/11/2020				Station DI Drain In			
Slot	Position	Size	Cut	Operation	Offset		
Zendow Frame L 44mm 12601W-White							
6	F_A	1006 ±	U	DI012901	183 (823)	[]	
					823 (183)	[]	
7	F_A	1006 ±	U	DI012901	183 (823)	[]	
					823 (183)	[]	
8	F_A	1006 ±	U	DI012901	183 (823)	[]	
					823 (183)	[]	
9	F_A	1006 ±	U	DI012901	183 (823)	[]	
					823 (183)	[]	
10	F_A	1006 ±	U	DI012901	183 (823)	[]	
					823 (183)	[]	

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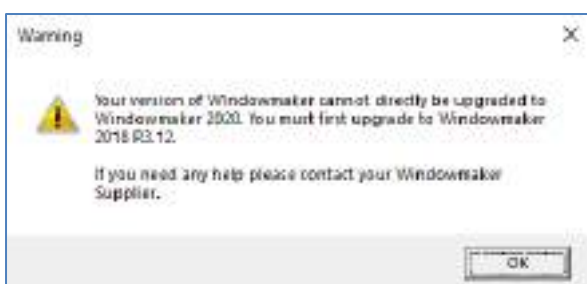
Breaking Changes

This section lists important behaviour changes, which are introduced in this version. These must be read in order to understand how they might affect your installation & upgrade process.

General

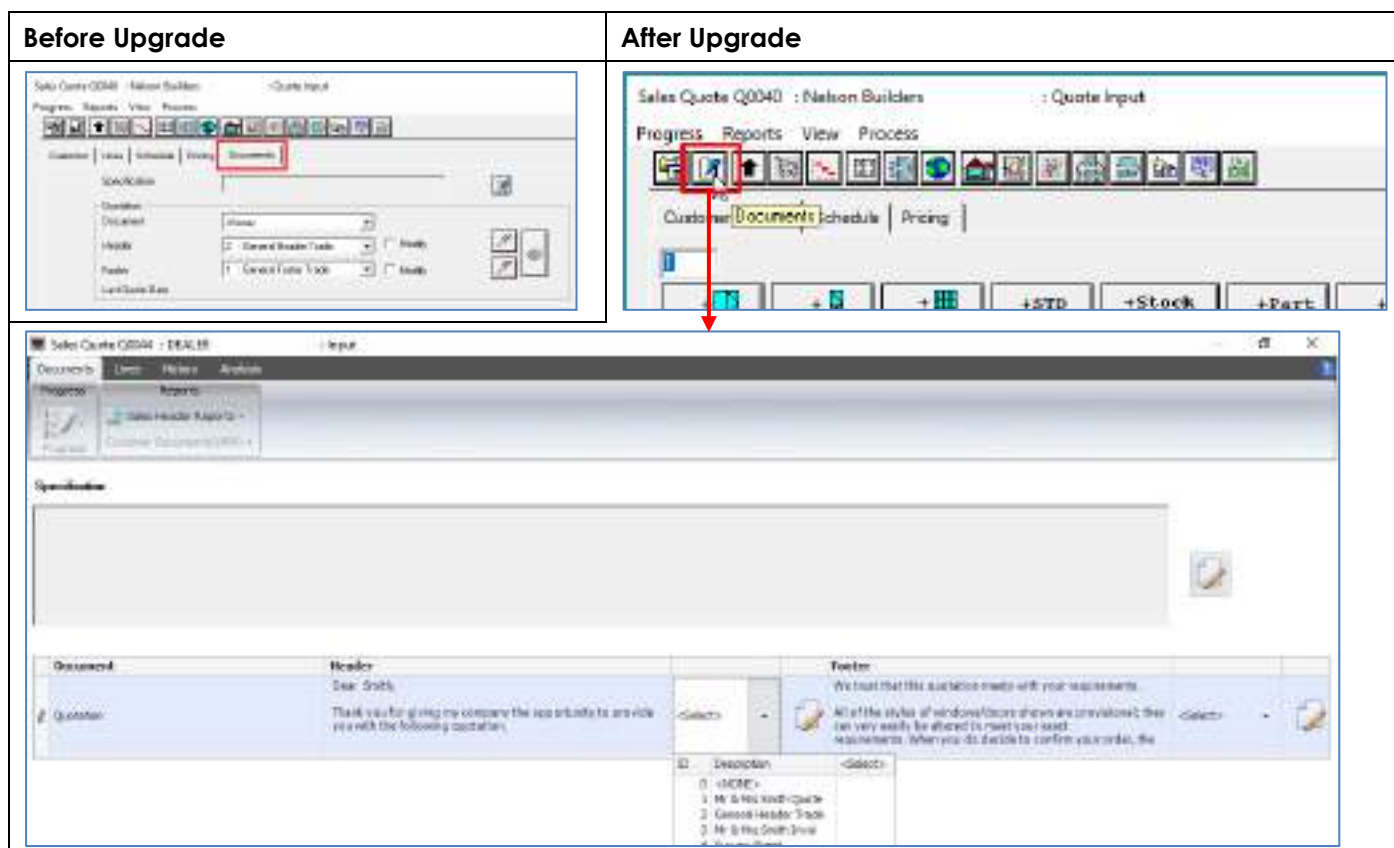
Upgrading to Windowmaker 2020

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



Sales Header Notebook

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



Active/Inactive Products

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

Database Schema Changes

Changes to Primary Keys:

Name	Primary Key	Change
pk_WMGlobalData_ID	WMGlobaldata.ID	Added

New database tables:

Name	Remarks
WMApplcationSetting2	To store Dealer specific information including Installation Cost, Installation Price, Survey & Installation related information, <i>Note: For Survey/Installation Capacity, only 'Input per Order' approach is available.</i>

Changes specific to database tables:

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

Changes specific to database views:

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

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New Stored procedures:

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

New Trigger:

Name	Remarks
wm_tg_Update_WMSalesHeaderTable	For internal use

Changes to Options

Revisions

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

Issues Fixed

Windowmaker 2020 SP1

Order Entry | Sales Client - 2079256

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

Order Entry | Sales Line Pricing | Discounts- 2078937

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

Order Entry | Sales Lines | Reports - 2078973

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

Order Entry | Flag Sales Line - 1868271

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

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Order Entry | Sales Headers - 2077782

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

Order Entry | Reports - 1977413

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

Order Entry | Shapes – 1977159

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

Order Entry | Link to CAD - 1977267

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

Order Entry | Special Terms - 1977293

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

Order Entry | Sales Lines | Entrance Doors – 1976920

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

Order Entry | Sales Lines | Entrance Doors – 1974948

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

Production Batch | Production document - 2078185

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

Setup | Cost Matrix - 1976317

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

Setup | Rules - 1976790

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

Setup | Entrance Doors – 1976788

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