

# Evolution User Guide

---

---



## TruFrame

This document is controlled by:  
**Technology Department**

# Table of Contents

Section	Title	Page
1	<a href="#"><u>Starting Evolution</u></a>	3
2	<a href="#"><u>Processing (Basics)</u></a>	
2.1	<a href="#"><u>Quotes and Order Processing</u></a>	4
2.2	<a href="#"><u>Creating a New Job/Opening Existing</u></a>	5
2.3	<a href="#"><u>Error Messages</u></a>	20
3	<a href="#"><u>Processing (Advanced)</u></a>	
3.1	<a href="#"><u>Horizontal Couple/Multi-Segment</u></a>	21
3.2	<a href="#"><u>Welded Cills</u></a>	29
3.3	<a href="#"><u>Creating Bays or Bows</u></a>	34
3.4	<a href="#"><u>Adding Additional Items</u></a>	38
3.5	<a href="#"><u>Adding Additional Glass</u></a>	41
3.6	<a href="#"><u>Setting Up Discounts</u></a>	43
4	<a href="#"><u>Printing Documents/Reports</u></a>	46
5	<a href="#"><u>3rd Party Glass Supplier Setup</u></a>	49
6	<a href="#"><u>3rd Party Panel Supplier Setup</u></a>	53
7	<a href="#"><u>Pricing</u></a>	55
8	<a href="#"><u>Transferring Quotes to Orders</u></a>	57
9	<a href="#"><u>Ordering From TruFrame</u></a>	58
10	<a href="#"><u>Troubleshooting</u></a>	59

TruFrame customers have the option to use an on-line hosted software package called 'RemoteSatellite' to create and store quotations and orders.

A selection of reports can be printed off either direct to your printer or optionally download as a PDF file that can be emailed to the end customer or stored for future reference. Orders can be placed directly with TruFrame without the need to print and fax a paper copy.

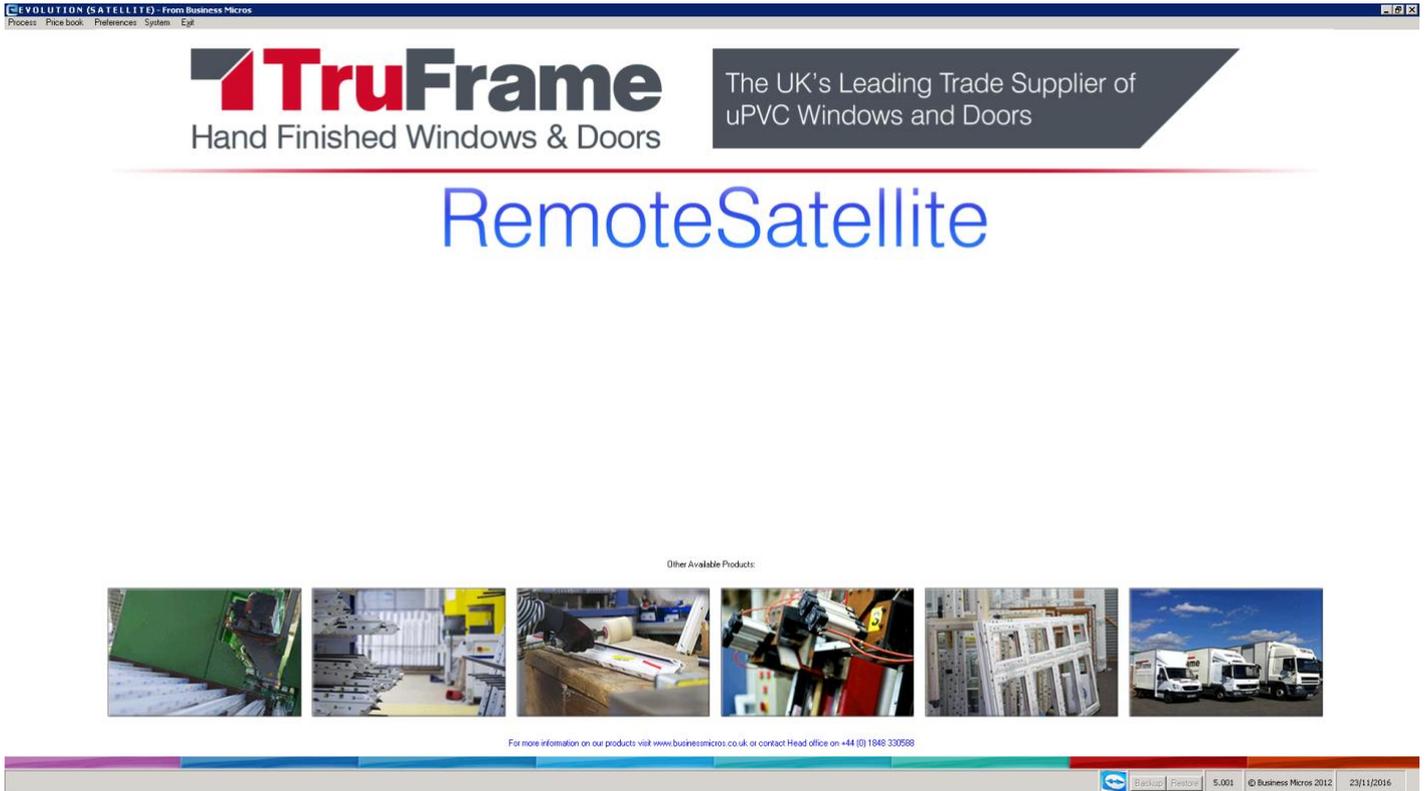
The software, in terms of order processing is, with a few exceptions, identical to that used in house by our Processing Department. In addition, if you buy-in glass or panels from other (not TruFrame) suppliers you can create and maintain your own specific glass or panel lists which are used within jobs for pricing and printing supplier requirement lists. There is also the facility to price jobs with a percentage margin, including fitting, to produce a sales price quotation or order for your customer.

TruFrame will remotely install the software links and supporting software to enable remote log on from any Windows (XP SP3 or above) computer, either at your place of business or home. Optionally, installation instructions for Apple and Android smartphones or tablets are available on request.

This guide is split into two parts; the first part offers instruction for creating basic products, windows, doors etc., printing documents and pricing. The second section shows how to process bays, multi-segment products (doors and flag window combinations) and conservatories.

### Section 1: Starting Evolution

After you have logged onto the system you will see this screen. If this is not the case, please contact our Technology Department immediately.



Please give the software a few minutes to load up, the progress bar at the bottom will reach the end when finished

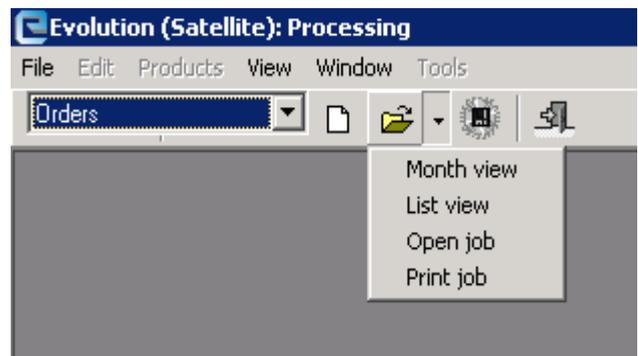
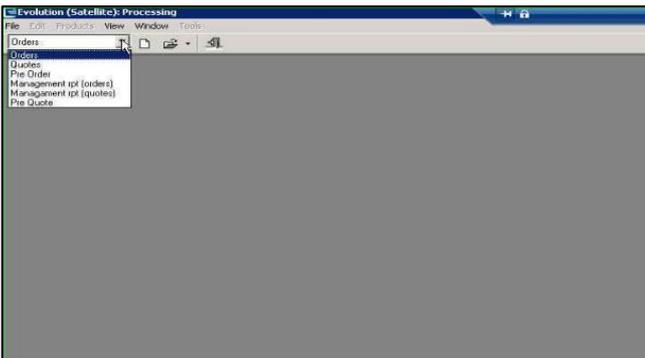
## Section 2: Processing (Basics)

### 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 top left.



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



If you click the down arrow next to the folder and click on "List view" the job list will appear as seen below, these jobs can be opened with a double click of the mouse.

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

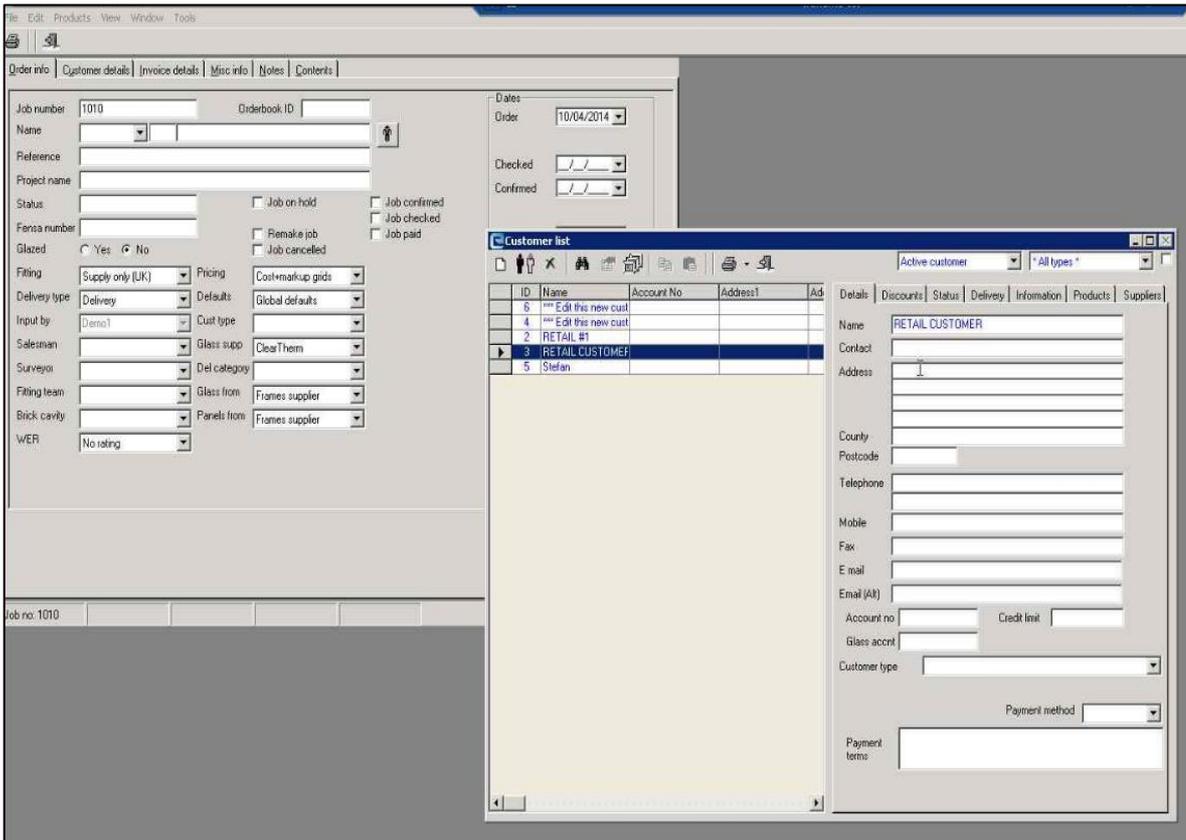
Copy job or convert from quote to an order

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.

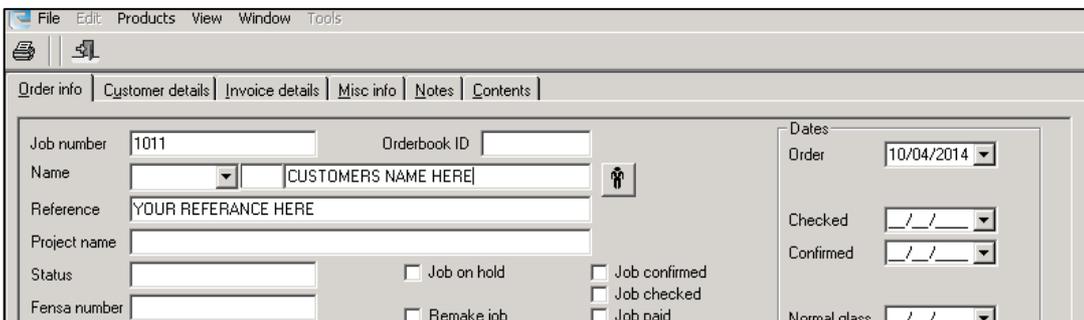
## Section 2.2: Creating a new job or opening an existing job

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 have 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** (TruFrame) or **3<sup>rd</sup> party supplier** (your own supplier).

Please note – if you set Glass from to **3<sup>rd</sup> 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

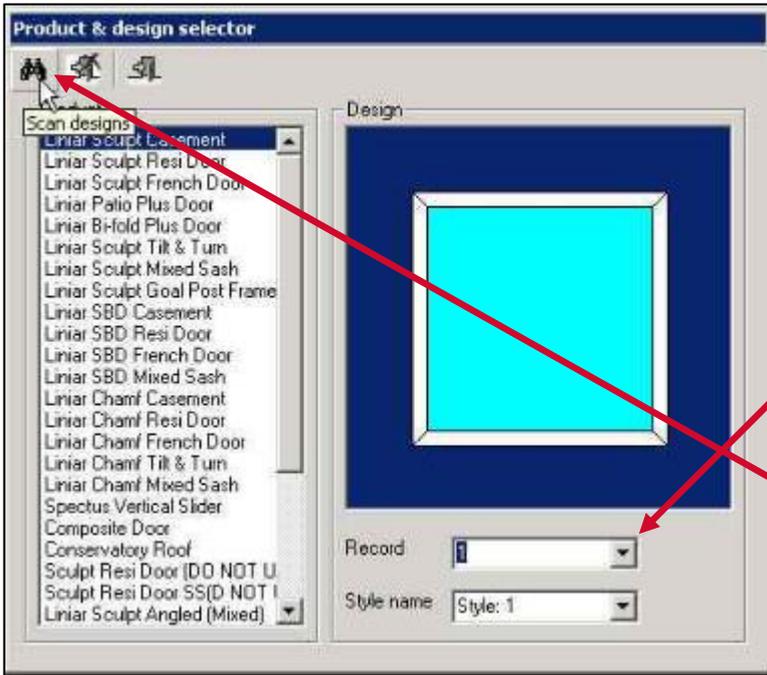
Add loose glass or pane

Display list prices on job

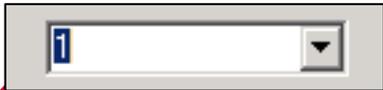
Paste item from clipboard

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

The following dialogue box will appear:



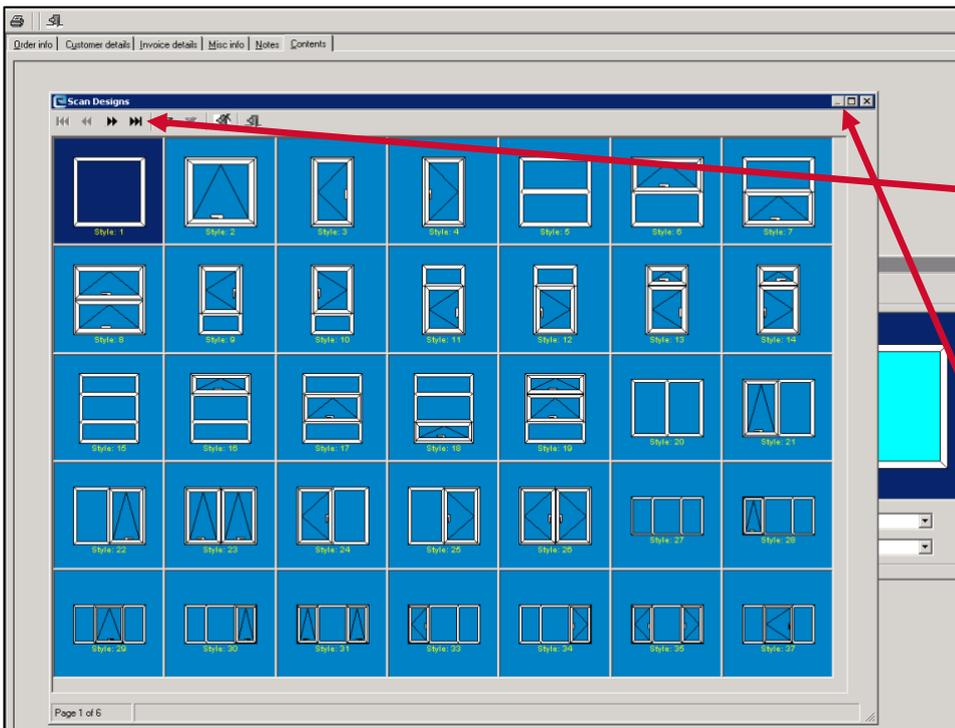
First choose the type of product you would like to input, then select or type in the **Record** number or **Style name** into the appropriate drop down box.



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.



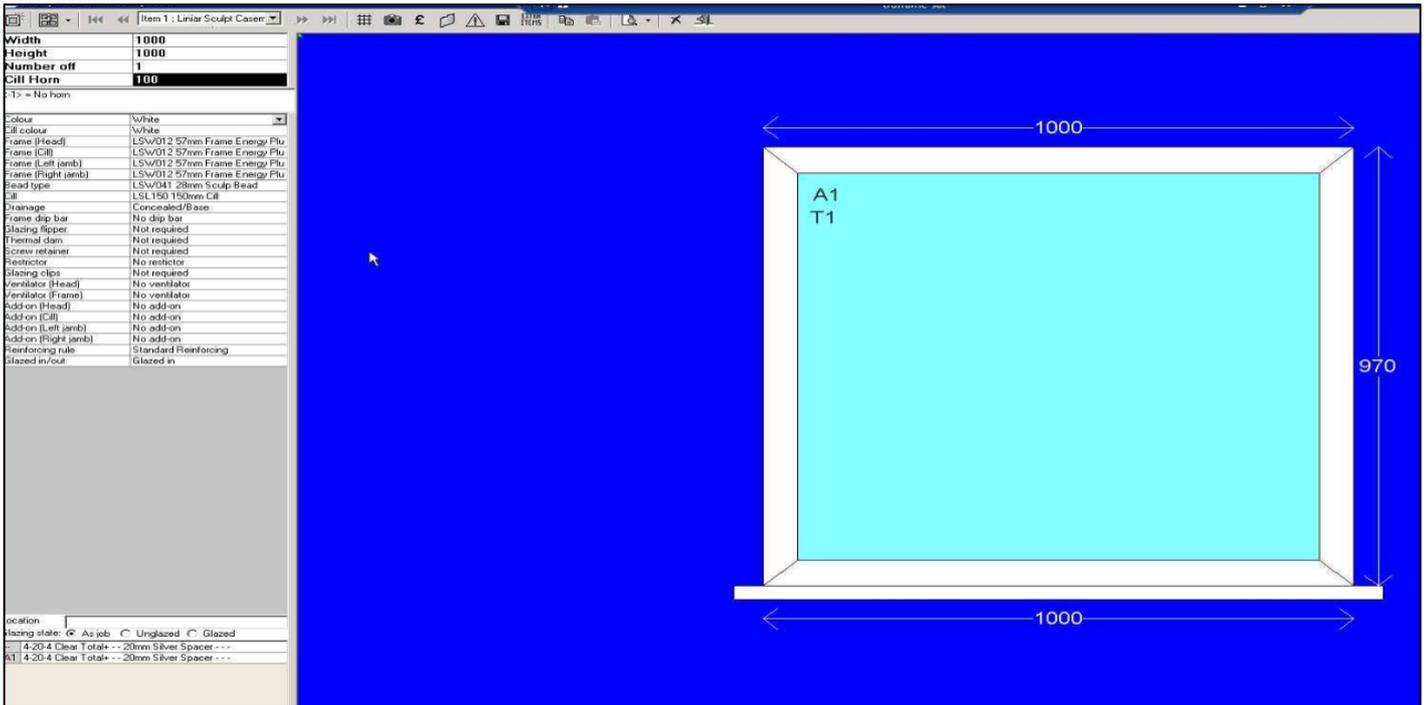
Use the 'Next page' button to scroll through all the designs



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.

<b>Width</b>	<b>1000</b>
<b>Height</b>	<b>1000</b>
<b>Number off</b>	<b>1</b>
<b>Cill Horn</b>	<b>500</b>

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.

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
Bead type	LSW041 28mm Sculp Bead
Cill	LSL150 150mm Cill
Drainage	Concealed/Base
Frame drip bar	No drip bar
Glazing flipper	Not required
Thermal dam	Not required
Screw retainer	Not required
Restrictor	No restrictor
Glazing clips	Not required
Ventilator (Head)	No ventilator
Ventilator (Frame)	No ventilator
Add-on (Head)	No add-on
Add-on (Cill)	No add-on
Add-on (Left jamb)	No add-on

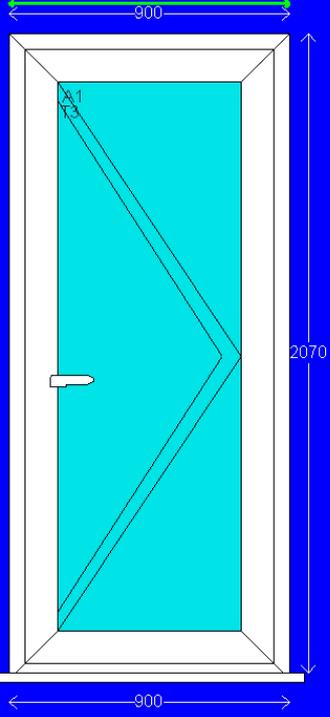
This is an example of the option choices. When you click on the word **White** in the picture on the left. It will bring up all the available frame colours for this product type.

White
Mahogany
Mahogany on White
Golden Oak
Golden Oak on White
Rosewood
Rosewood on White
Cream
Cream Foil
Cream Foil on White
Black Foil
Black Foil on White

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 Thres
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/Base
Frame drip bar	No drip bar
Sash drip bar	LAN105 Cill Drip
Glazing flipper	Not required
Thermal dam	Not required
Screw retainer	Not required
Restrictor	No restrictor
Handle	White Lev/Lev Handle
Cylinder	Nickel Cylinder
Door lock	3 Claw Door Lock
Door hinge	White Flag Hinges
Door hinges quantity	3 hinges
Glazing clips	Not required
Ventilator (Head)	No ventilator
Ventilator (Sash)	No ventilator
Ventilator (Frame)	No ventilator
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
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

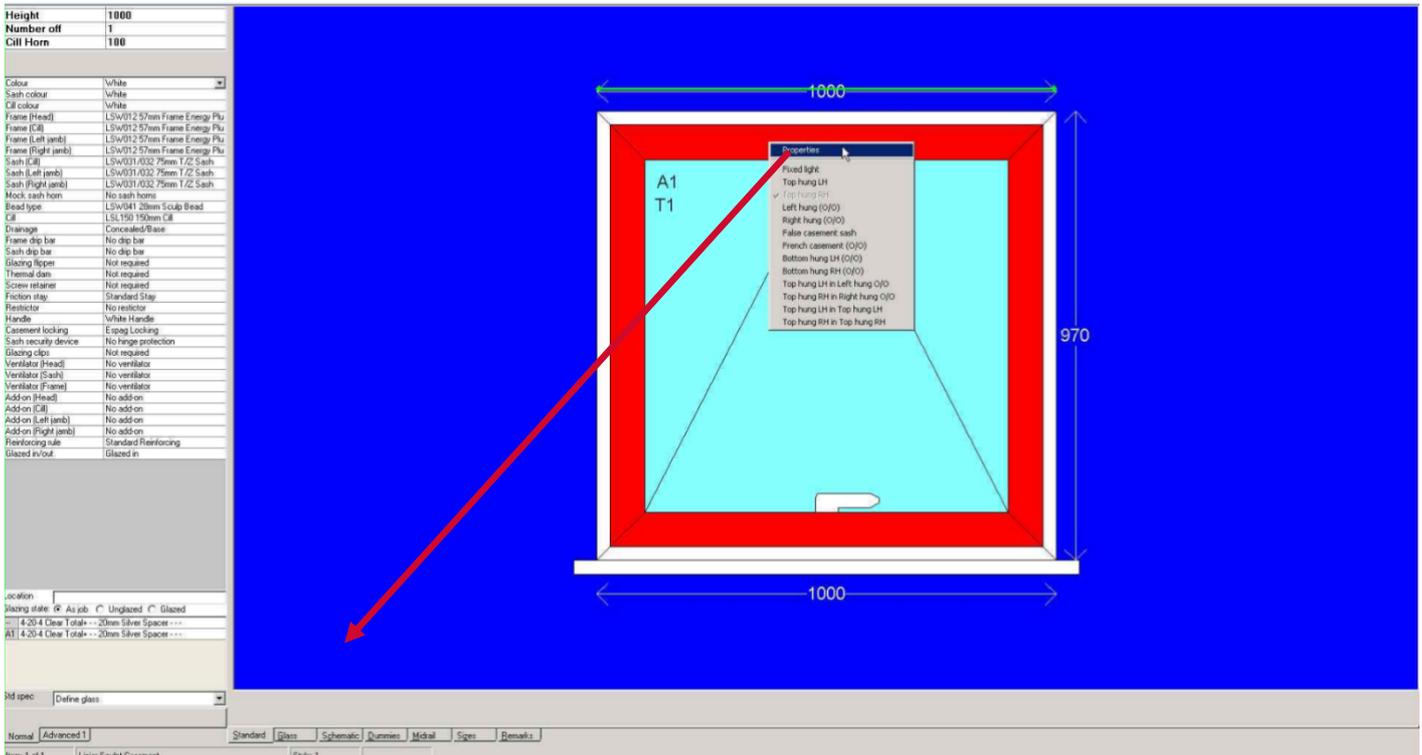
No threshold
Goalpost frame, not milled
Goalpost frame, sash -50mm
Goalpost frame, sash -25mm
Goalpost frame, sash -20mm
Goalpost frame, sash -10mm

...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
<b>LSW011 57mm uPVC Low Threshold</b>
LSW026/027 87mm Odd Leg Outer

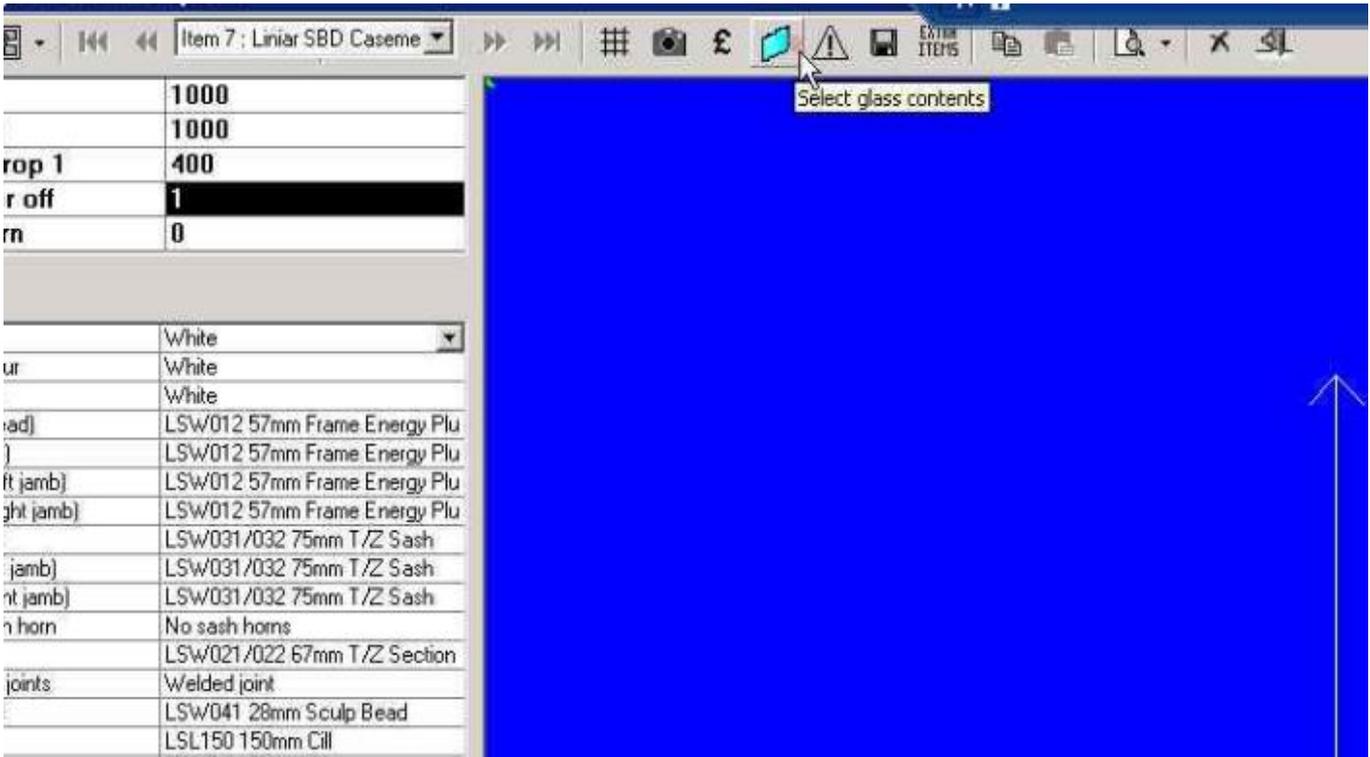
Options and aperture types can be changed using the frame drawing. On the drawing, right click on the sash or fixed light then select properties from the pop-up menu. The option list on the left of the screen will then show options that are only applicable for selected aperture. The pop-up menu will 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.



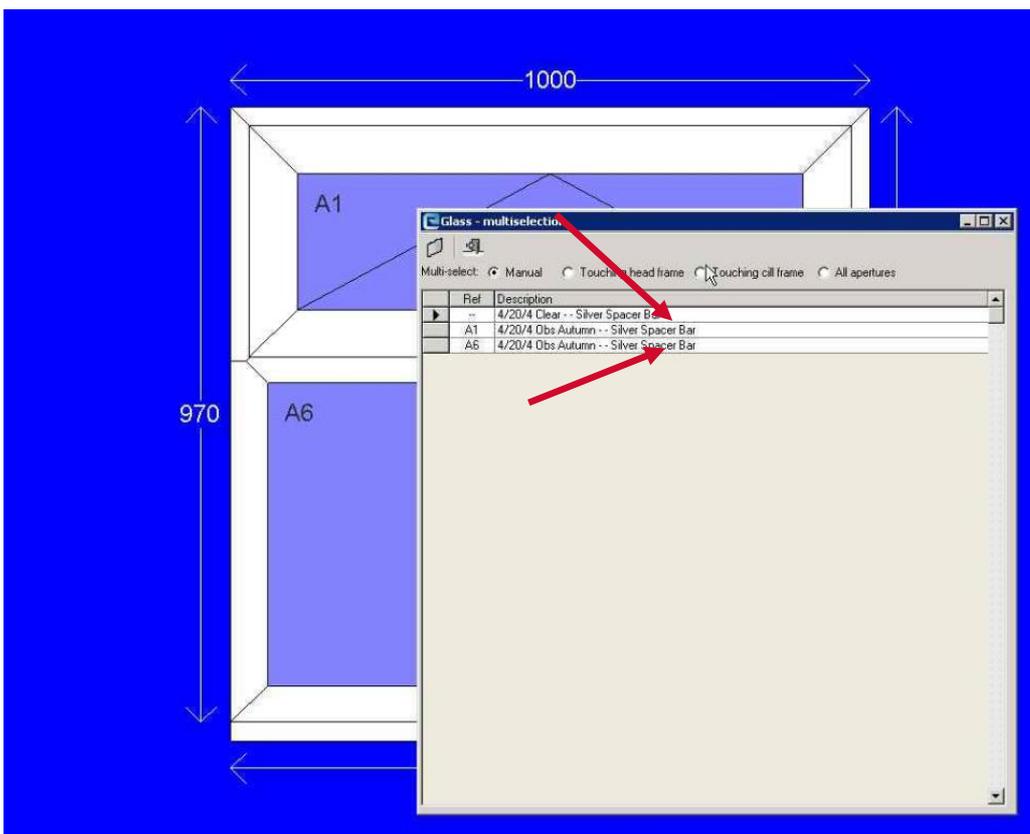
Option heading text colours change after a selection. If blue the option choice is different to the system default and red if changed using the right click method (above).

### 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 singularly or as a group. Aperture (A1) on the frame drawing corresponds to that shown against each line in the glazing list (below).

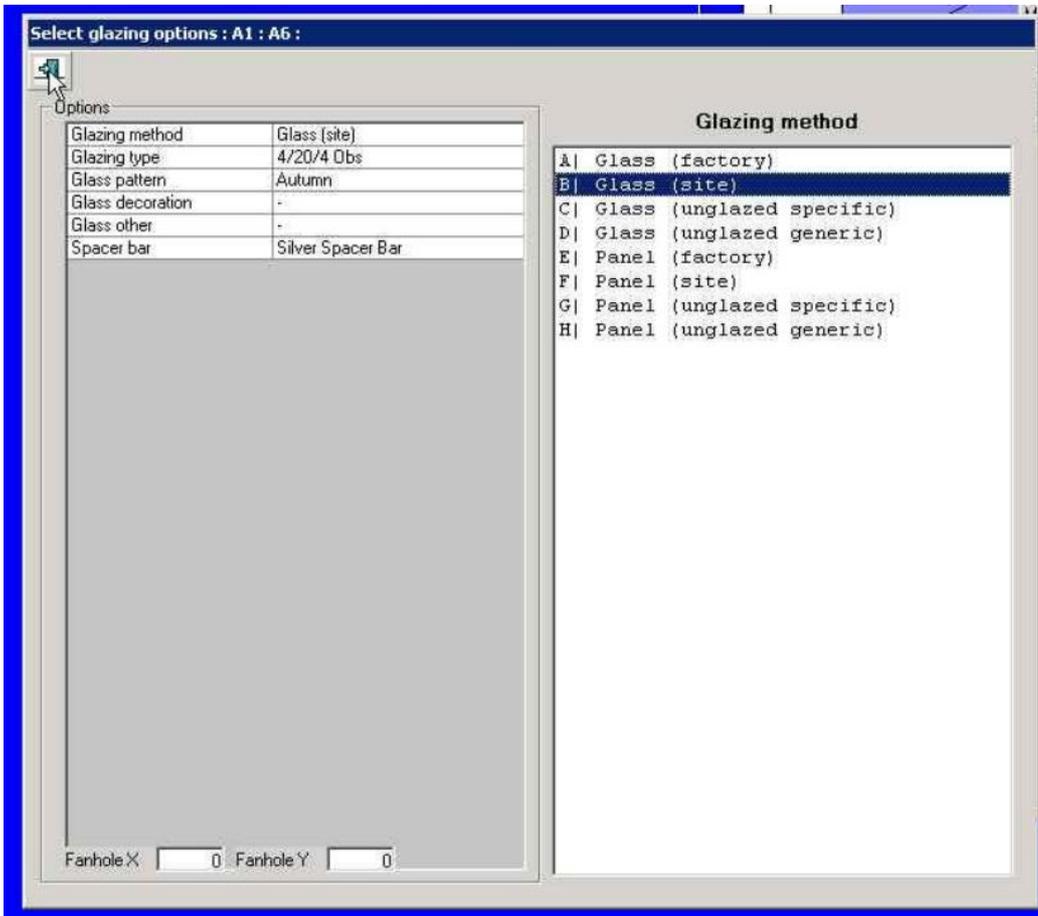


At the top of the glazing list select either 'Manual', 'Touching Head Frame', 'Touching Cill Frame' or 'All Apertures', this will highlight (select) the lines you wish to edit.



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.

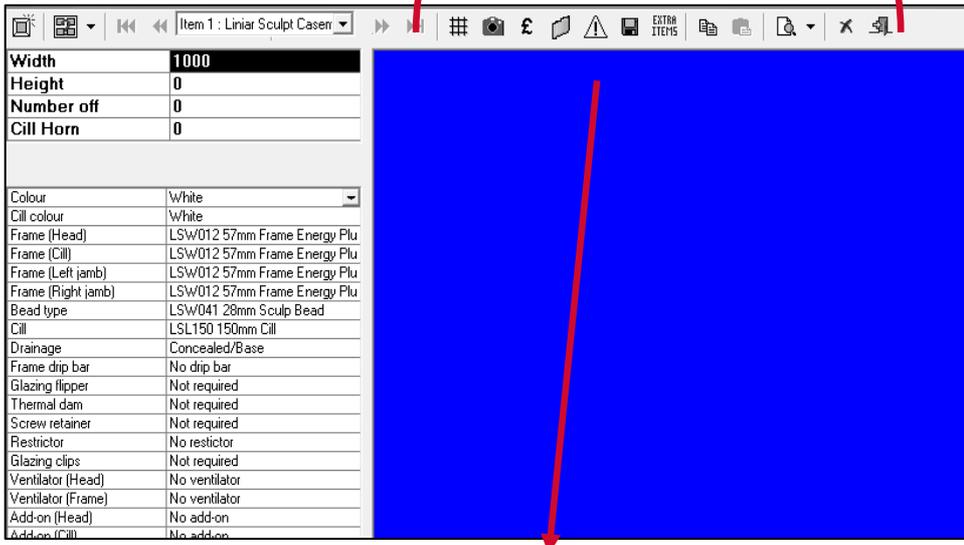
The following form will appear (below), clicking on any of the lines in the left panel will display the option choices in the right panel. Under glazing method always select either 'Glass (site)' or 'Panel (site)', move through each option on the left until the desired options are set.



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

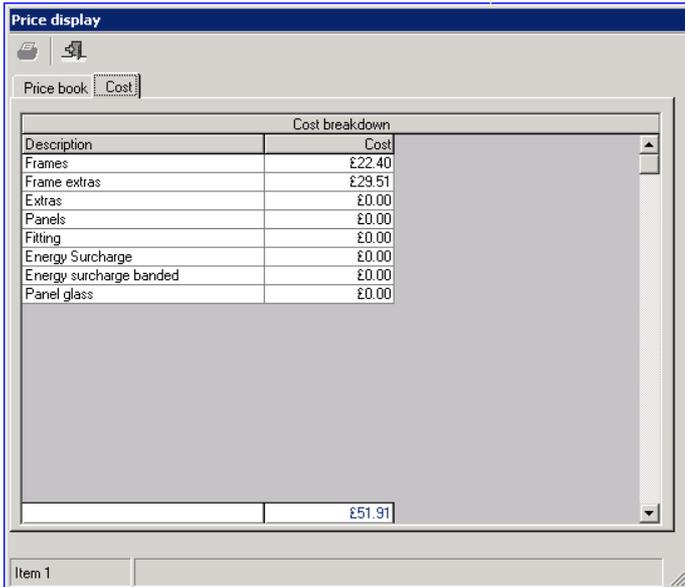


-Show the error log for this item

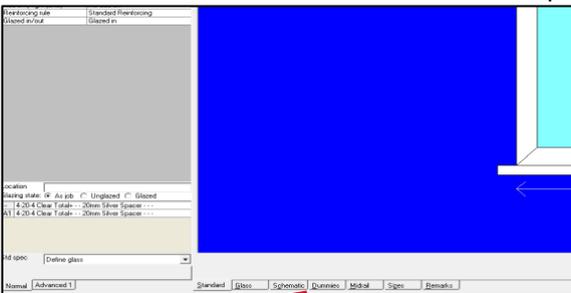


Show a breakdown of the price

To view the frame costs from TruFrame 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 with TruFrame.



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.

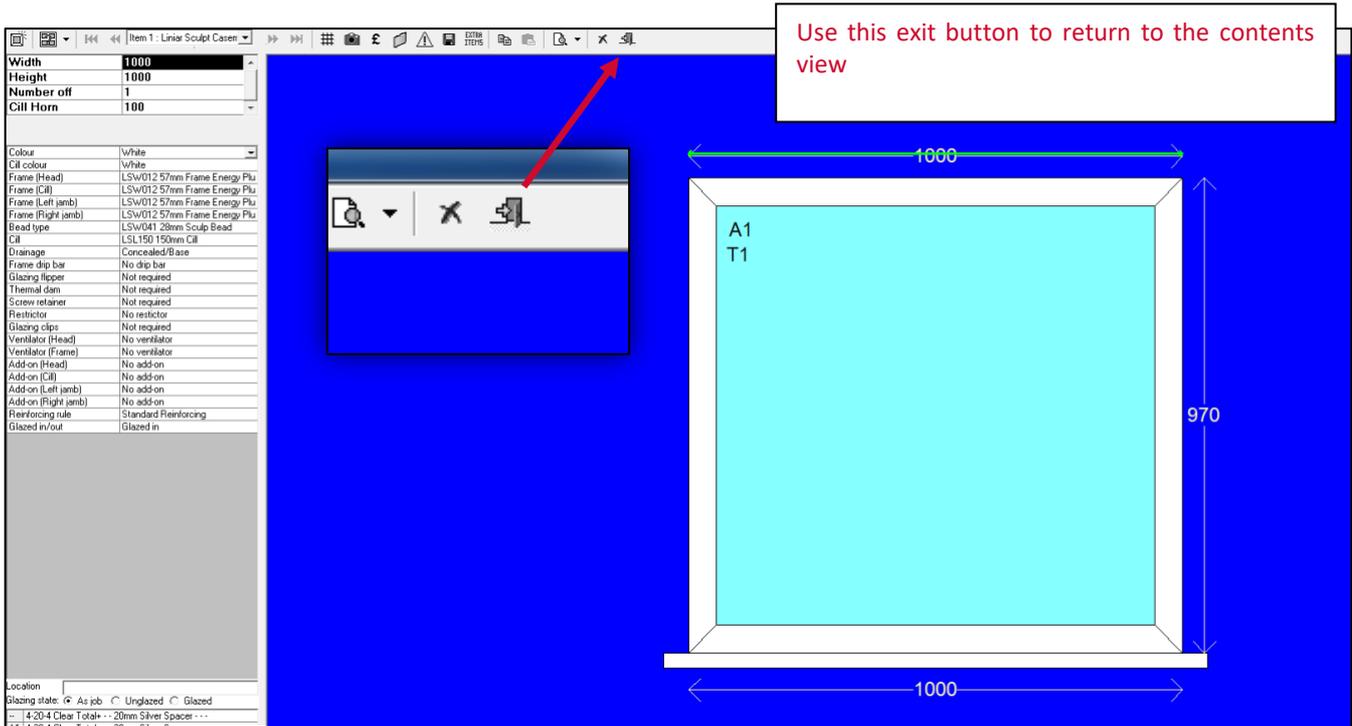
**Sizes**

A better layout of size input options

**Midrail**

Add midrail and vertical rails to the frame

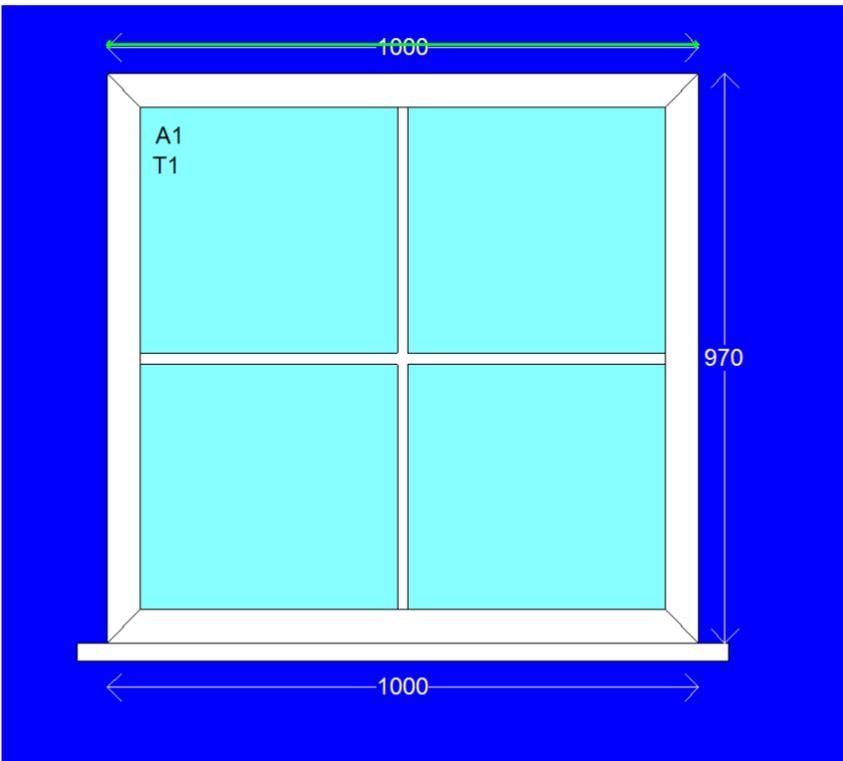
When finished setting the frame and glazing options completed the item using the 'exit' item, this will take you back to the "contents" view.

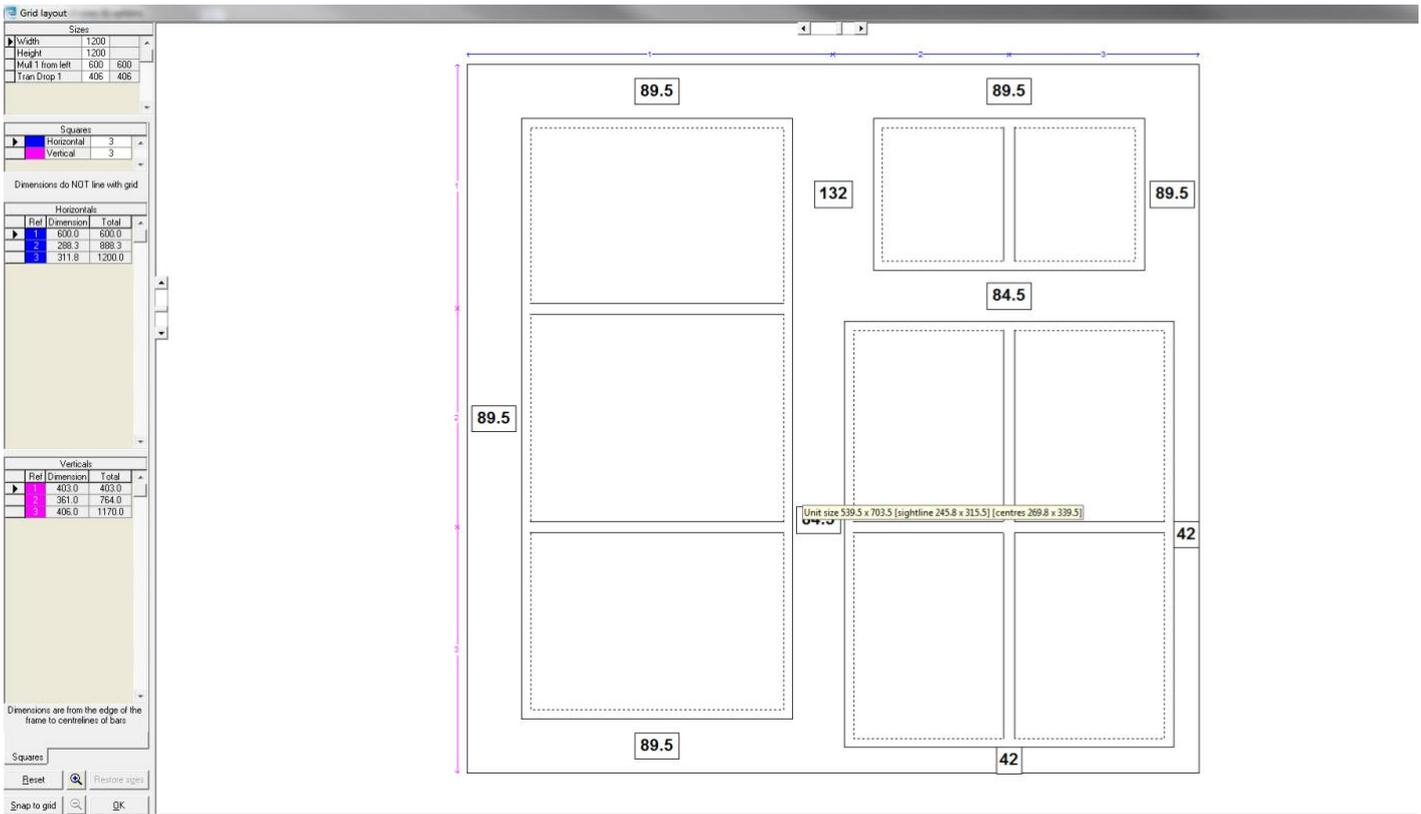


After adding in glass decoration, it may need changing, i.e. Squares may need removing, or lines might need adjusting. In the first example, there are Georgian bars placed on a sculptured casement.

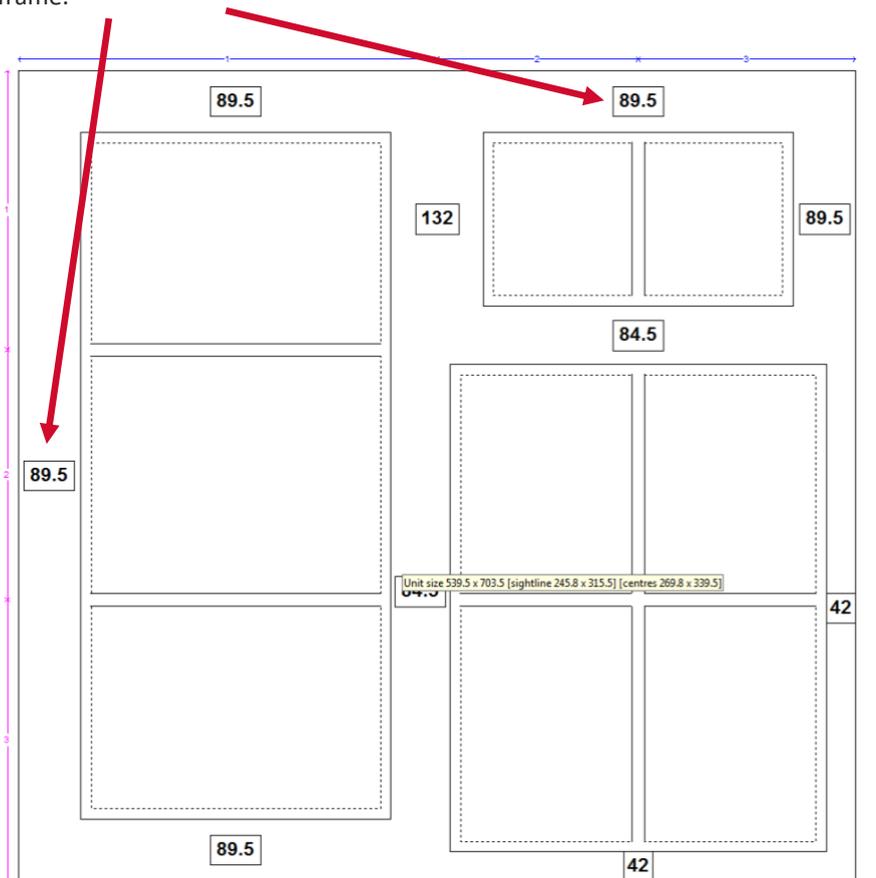


Using the  button we are able to manipulate any glass decoration in place, this screen will also give you the glass sizes of all apertures on the product. Below is an example of Georgian Bars used on a sculptured casement

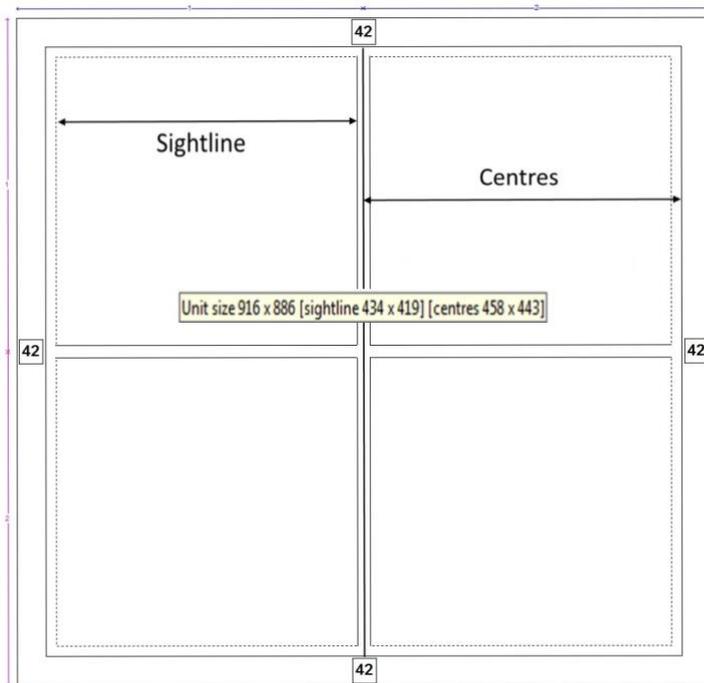




Here is a schematic view of the casement. On this view it is showing the dimensions between the aperture and the end of the frame.



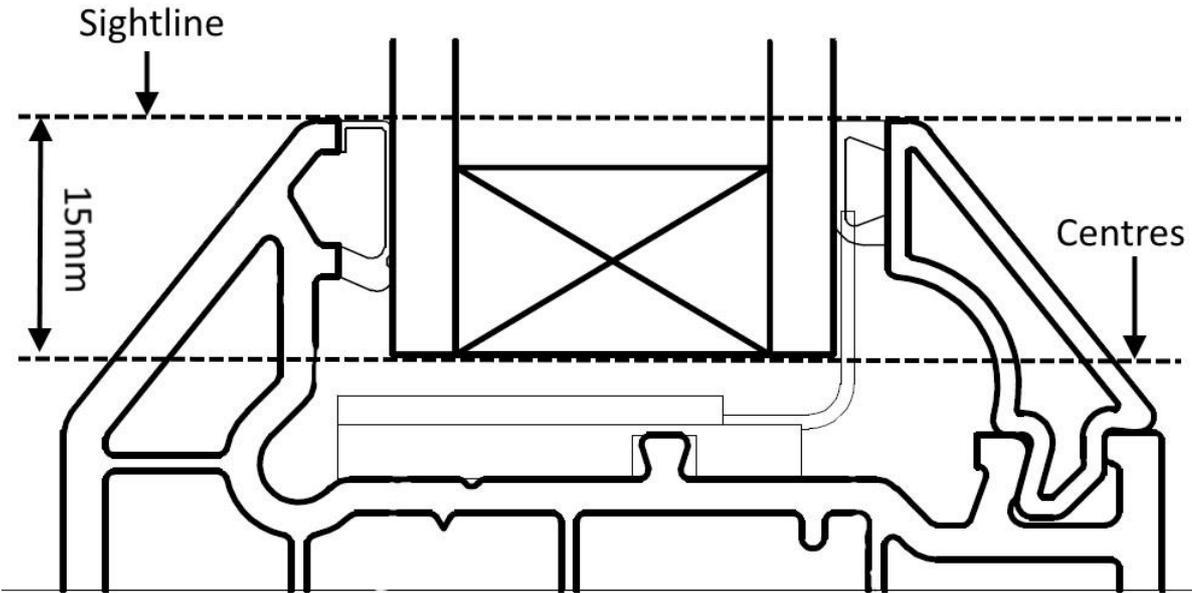
Below is an example of the unit dimensions. To start it shows the overall unit size, in this case it is 916 x 886



The sightline is one square of the unit divided by the glass decoration. It is measured using the part of the unit you can see (from the dotted line to the edge of the glass decoration). To work out the Sightline, we have to do the following equation, Overall width/height/2 = Centres – (Glass decoration/2) – 15mm = Sightline

In this example the equation for the sightline would be.  $916/2 = 458 - 9 - 15 = 434$

The Unit 'centres' are easy to calculate as they are just half the unit. So it would be  $916 / 2 = 458$  (Centres)



The picture above is a Birdseye view of the glass unit sat in the frame. The sightline and centres have been listed and show the 15mm gap between the both of them.

Sizes			
Width	1200		
Height	1200		
▶ Mull 1 from left	500	600	
Tran Drop 1	400	406	

The top part of the options are the "Sizes," there are two columns with different dimensions in place. The column on the left is highlighted in white making it editable, The width and height of the frame are adjustable here, so is the position of the transom and the mullion.

On the right hand column you will see two sets of numbers, on this example they are "600" and "406," these sets of numbers are not highlighted white, meaning that these numbers are unchangeable. The numbers purpose is to suggest a position for the transom and the mullion to be sitting at.

Squares		
▶	Horizontal	2
	Vertical	2

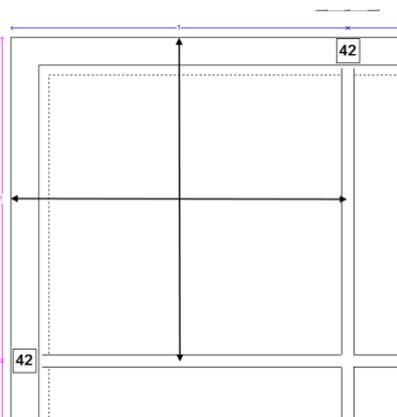
Dimensions do line with grid

The next set of options is regarding the amount of squares throughout the frame. In the example being used the amount of squares are set to 2x2. When selecting the amount of squares bear in mind, the transoms and mullions are used to set the amount of squares as well.

Horizontals			
	Ref	Dimension	Total
▶	1	500.0	500.0
	2	500.0	1000.0

Verticals			
	Ref	Dimension	Total
▶	1	485.0	485.0
	2	485.0	970.0

That last 2 sets of options are just showing the dimensions. These dimensions are set from the edge of the frame to the centre of the unit, which in this example is the centre of the vertical Georgian bar.



### Section 2.3: 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		

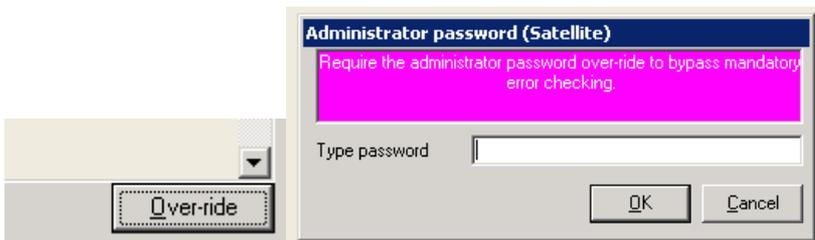
A mandatory message means that the frame will have to be altered before you can continue further. Press the 'Override' button at the bottom right of the screen, then press 'Cancel', this will take you back to the item allowing you to make the necessary changes.

**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	<b>Sash is below minimum size</b>	<b>Apert A-1</b>		



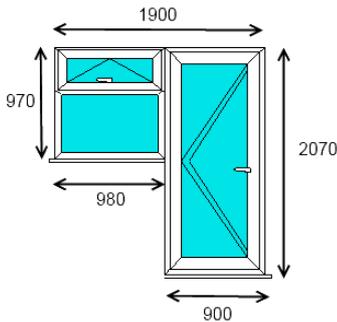
The screenshot shows a portion of the software interface. On the left, there is a button labeled "Override". To its right, a dialog box titled "Administrator password (Satellite)" is open. The dialog box has a pink background and contains the text: "Require the administrator password over-ride to bypass mandatory error checking." Below this text is a text input field labeled "Type password". At the bottom of the dialog box are two buttons: "OK" and "Cancel".

### Section 3: Processing Part 2

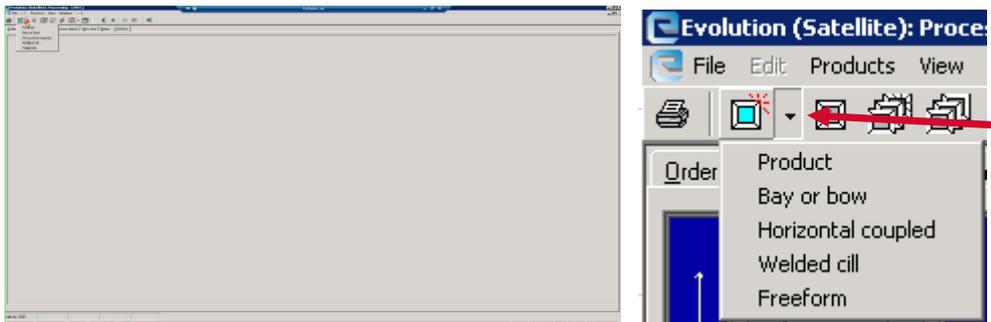
#### 3.1: Horizontal Coupled/Multi-Segment [http](#)

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.

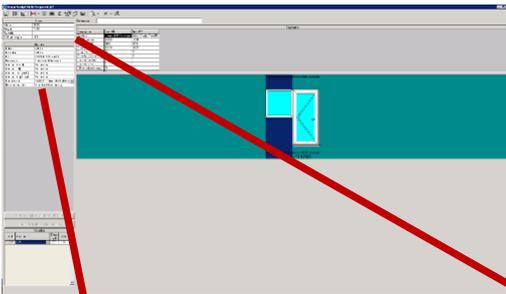
Select 'Horizontal coupled' and then choose the correct multi-segment type from the list.



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.

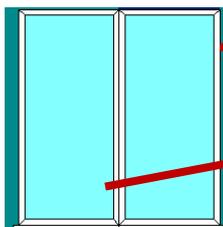
In the example this will be 1900 x 2100.



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	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

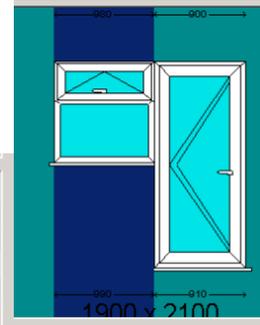
If the same cill is required for each segment, set the cill using the parent options (as below). However if a different cill is needed for each segment select 'No Cill' in the parent options, this will change the cill option inside each segment. (Please note, 'No Cill' in the parent type does not remove 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.)

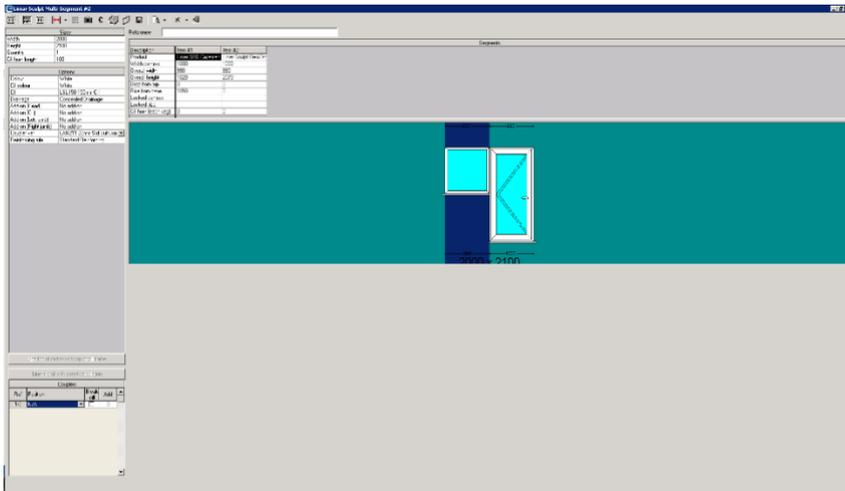
Cill horn length	100	Product	Lin	Frame (Head)	LSW017 77mm Frame Energy Plus
Options		Width centres	10	Frame (Cill)	LSW017 77mm Frame Energy Plus
Colour	White	Overall width	94	Frame (Left jamb)	LSW017 77mm Frame Energy Plus
Cill colour	White	Overall height	97	Frame (Right jamb)	LSW017 77mm Frame Energy Plus
Cill	LSL150 150mm Cill	Drop from top	0	Threshold	No threshold
Drainage	Concealed Drainage	Rise from base	11	Threshold tray	No
Add-on (Head)	No add-on	Locked centres		Bead type	LSW041 28mm Sculpt Bead
Add-on (Cill)	No add-on	Locked size		Cill	LSL150 150mm Cill
Add-on (Left jamb)	No add-on	Cill horn (each seg)	0	Drainage	Concealed Drainage
Add-on (Right jamb)	No add-on			Frame drip bar	No drip bar
Coupler ver	LAN211 20mm Std Butt Joint			Sash drip bar	LAN105 Cill Drip
Reinforcing rule	Standard Reinforcing				

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 Plu
Frame (Cill)	LSW012 57mm Frame Energy Plu
Frame (Left jamb)	LSW012 57mm Frame Energy Plu
Frame (Right jamb)	LSW012 57mm Frame Energy Plu
Bead type	LSW041 28mm Strip 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





Description	Item #1	Item #2
Product	Linlar Sculpt Caseme	Linlar 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

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

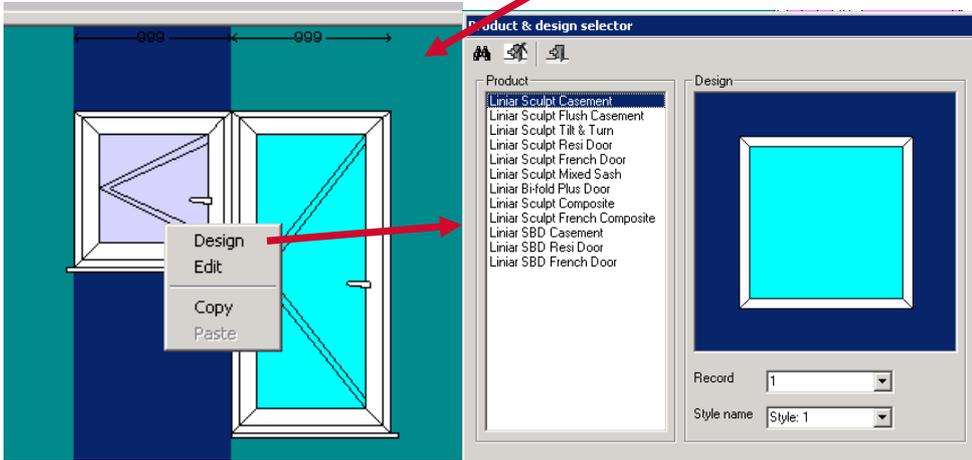
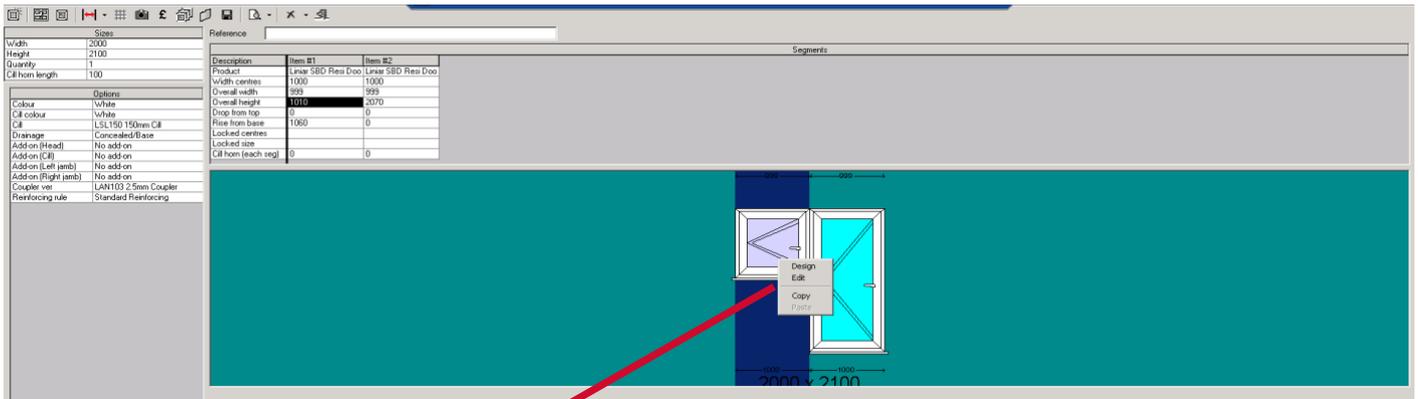
Remember the overall width and height is divided by the amount of segments that are in place

Sizes	
Width	1900
Height	2100
Quantity	1
Cill horn length	100

Reference		
Description	Item #1	Item #2
Product	Linlar Sculpt Caseme	Linlar 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

Segments

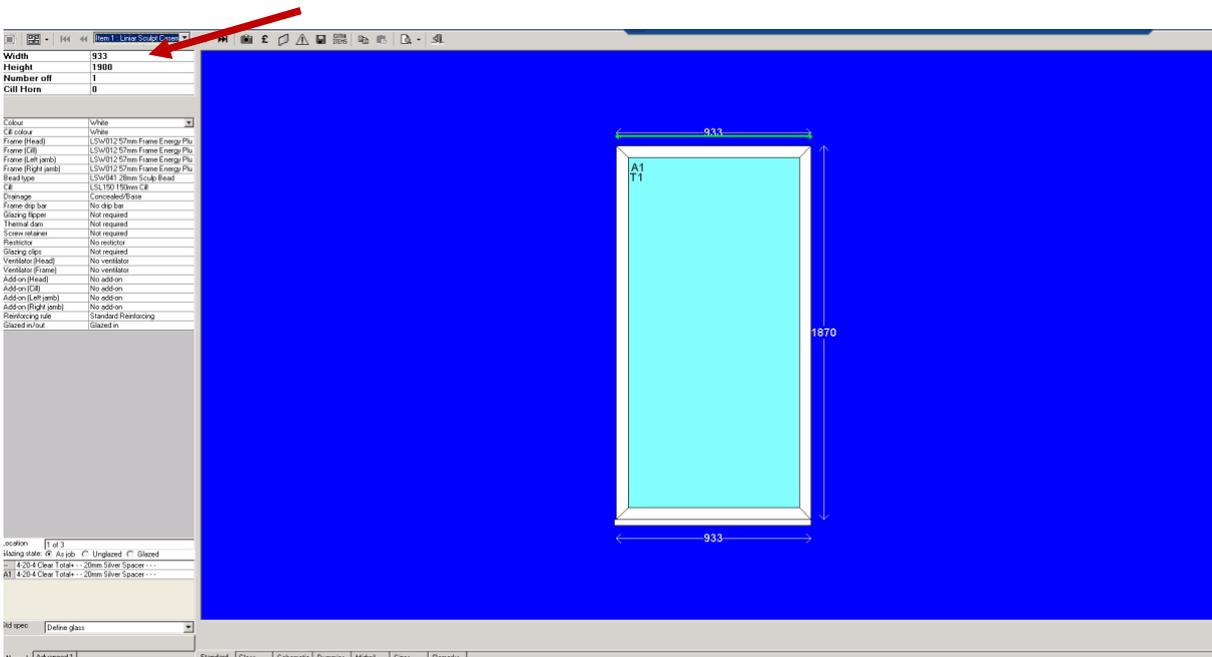
Each separate frame can be edited separately, casement, Resi Door or French door.



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.

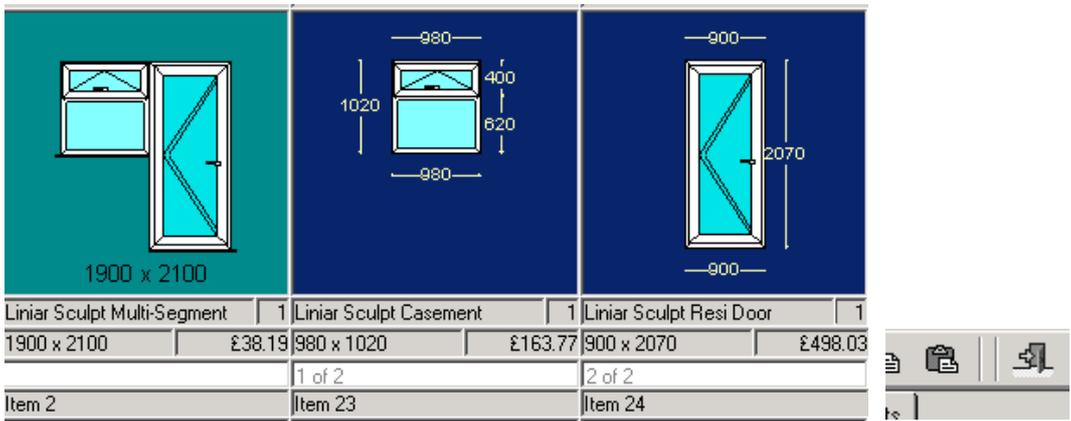


After finishing editing the frames, press the 'Exit' button to be brought back to this screen.

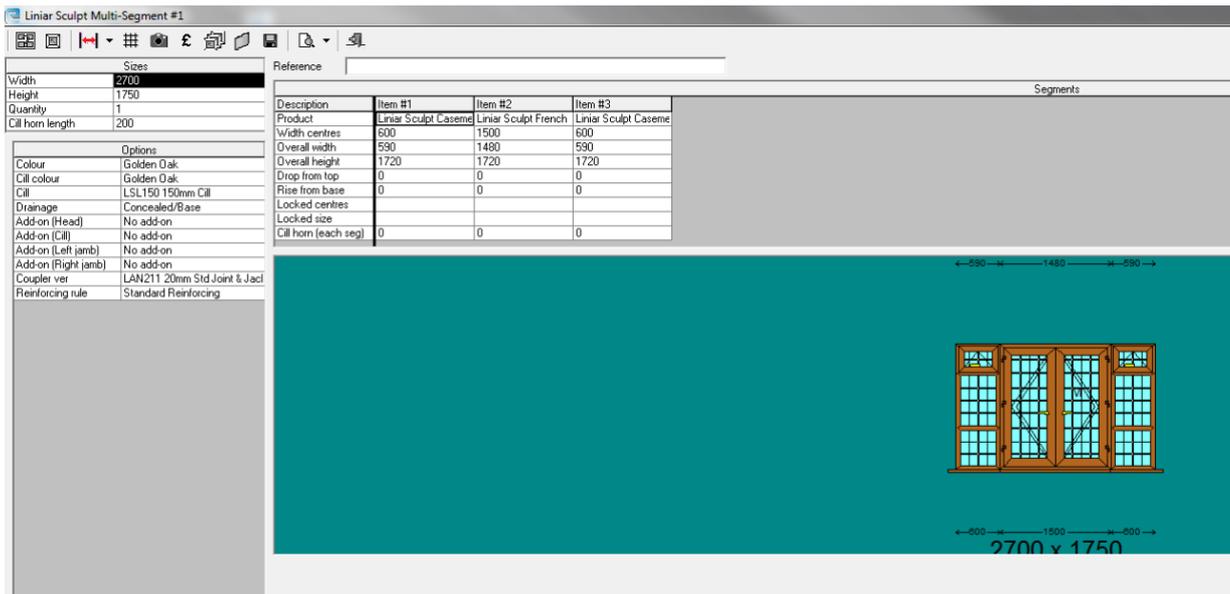
Once back on this screen, create more frames to add to the multi segment.

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

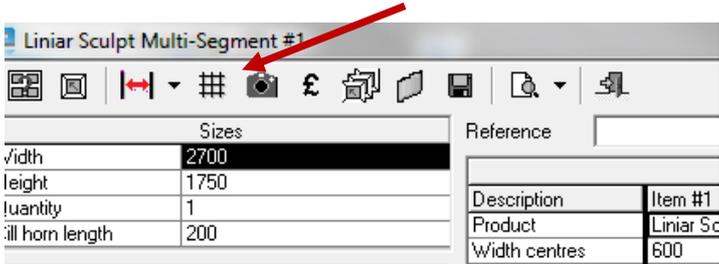
Or press the 'Exit' button to be taken back to the list of orders, where this job can then be processed.



With multi-segments, the glass decoration can be altered for all of the segments on the multi segment. This is an advantage as it helps to keep any glass decoration on the frames in line with each other.

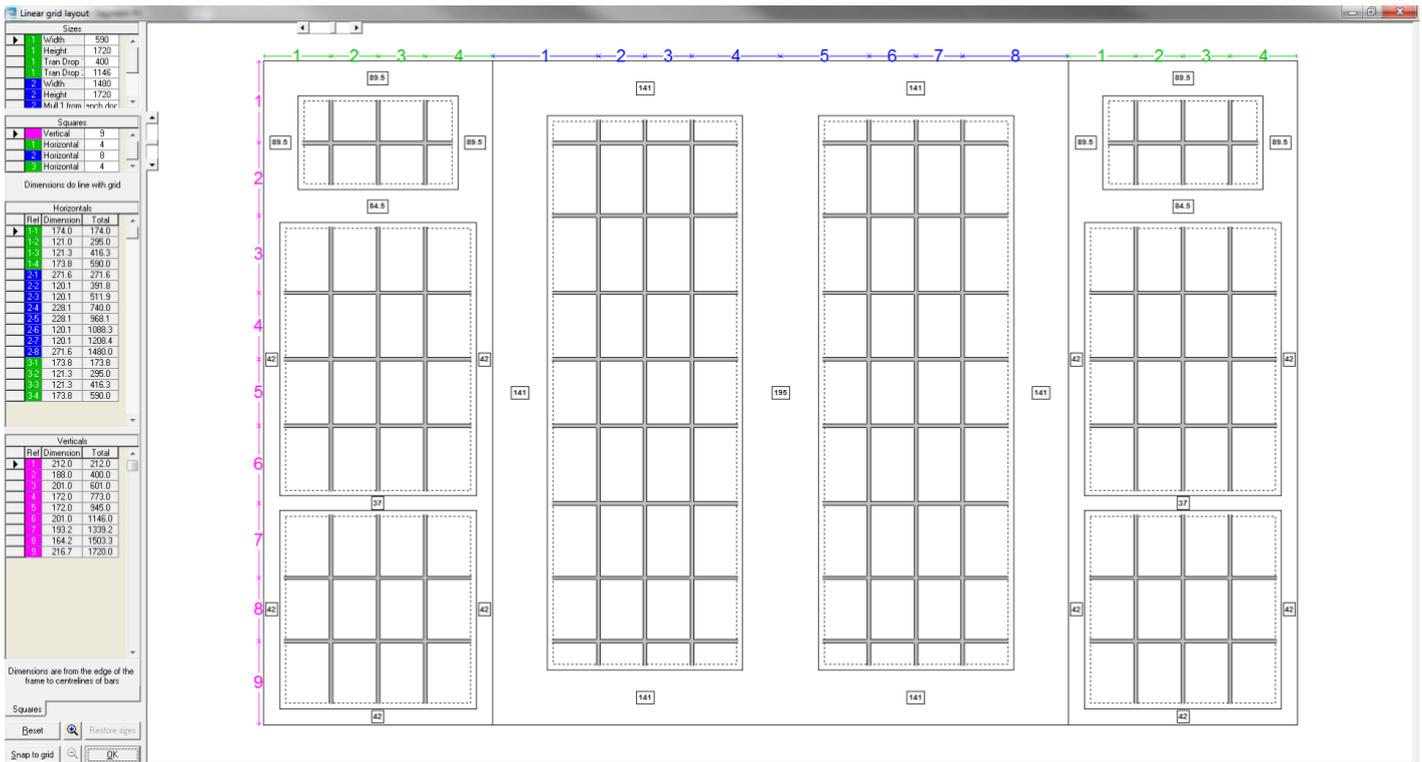


To alter the glass decoration press . This button will open up a schematic view of the multi-segment

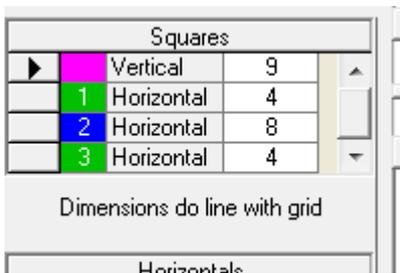


This is the screen that will appear once you have selected 'modify Georgian bars Square leads'

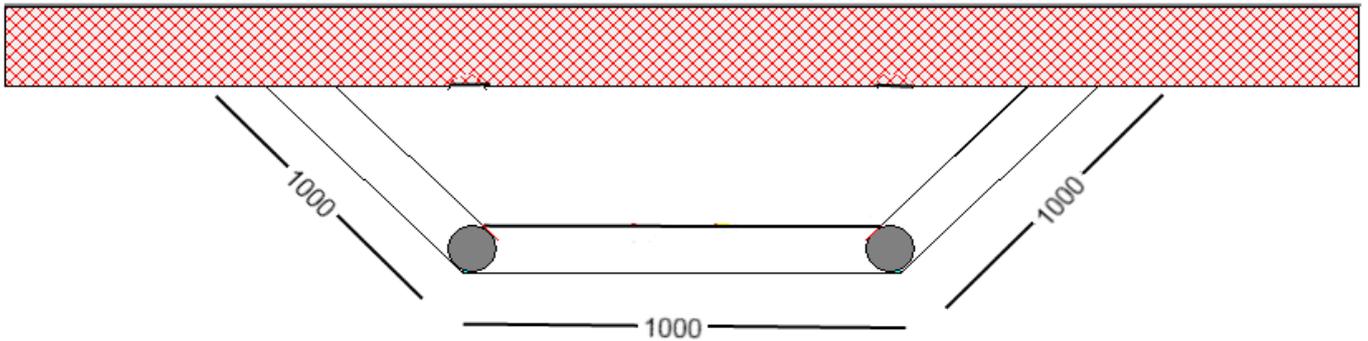
It is a schematic view of the multi-segment, it includes the glass decoration layout which you can change to suit requirements.



Using the squares option below, the amount of glass decoration in place is changeable. If the 'Vertical' option is changed, you will lose a horizontal line. For example, if the '9' was changed to an '8' each individual square would become taller as there out be 1 less square per column.

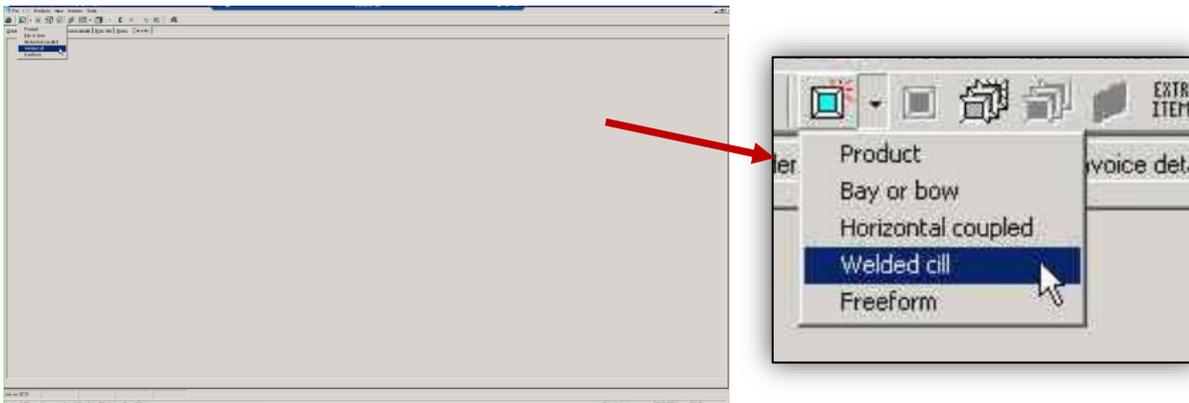


### 3.2: Welded Cill



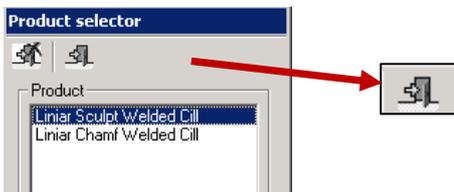
In this example, a 3-segment cill will be created.

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



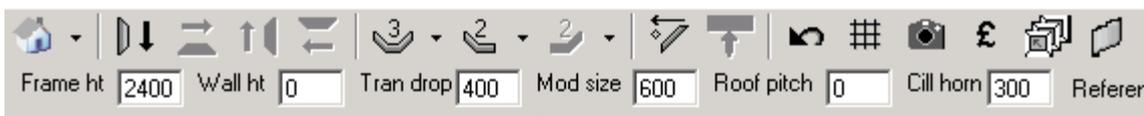
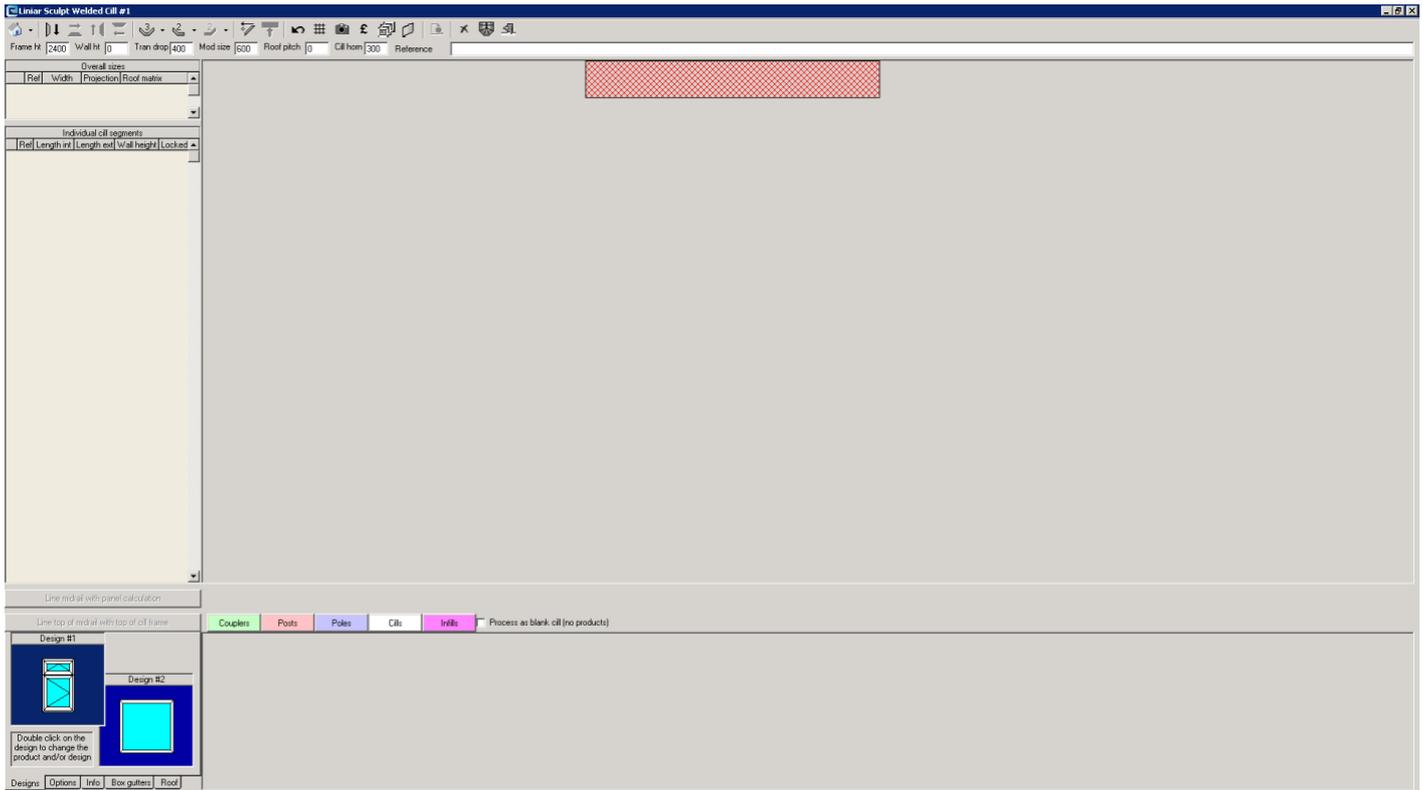
After the welded cill has been selected, a product type needs to be selected.

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



The next step after choosing the welded cill is clicking on “Original” bottom right of the screen.

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.



To begin you will need to complete the relevant information as example above. “Frame ht” will always be in reference to the highest frame involved on the welded cill. “Wall ht” will always be the difference between the overall door height minus the window height.

The “Mod size” is the option used to create the cill segments (internal measurements used) after this information has been input you can begin building the cill using the cill options shown below



-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

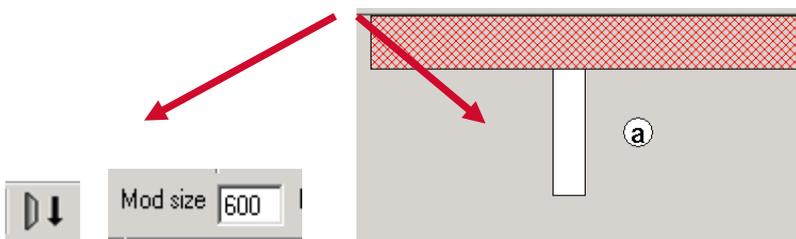


-Cill goes to the right

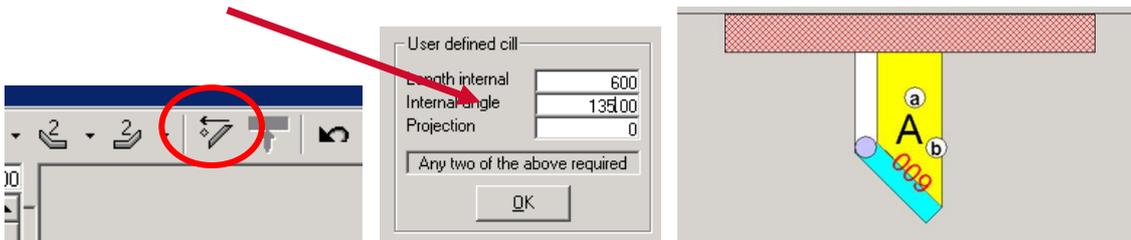


-Delete item

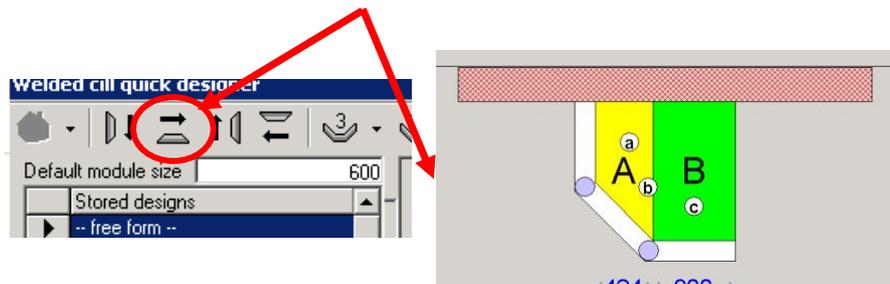
A 5-sided cill will be made here using user defined angles. The first part of the cill will be coming straight from the wall. To do this, use the 'Cill down' option. Make sure to set the size of the cill needed before creating the cill. Do this using the 'Mod size' box. In this example, the first cill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



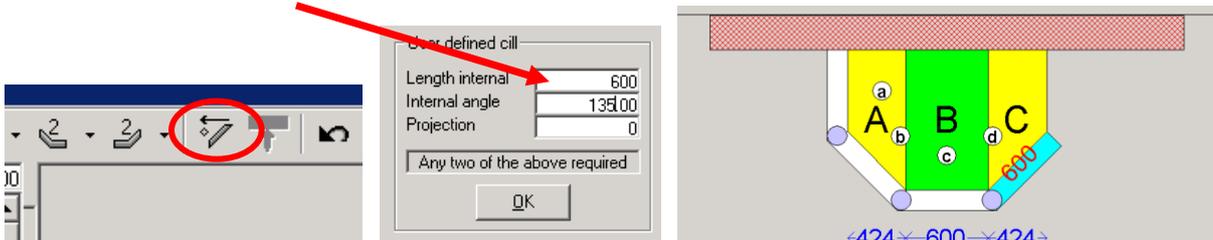
After the first cill has been created, the next part of the cill is going to need a 'Cill user angle'; this will set the internal length and angle relative to the previous cill.



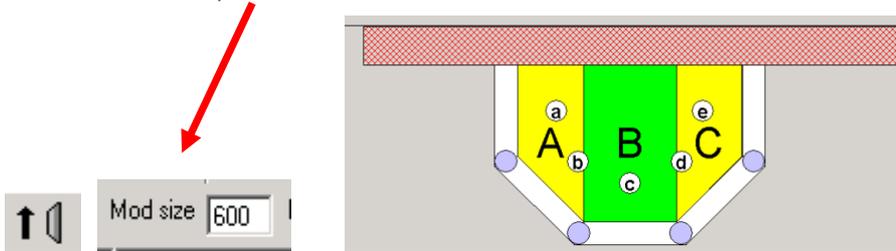
The third part of the cill will be running parallel to the wall. To do this, select 'Cill right' after entering the 'Mod size'. This will create a cill of the selected size running to the right, parallel with the wall.



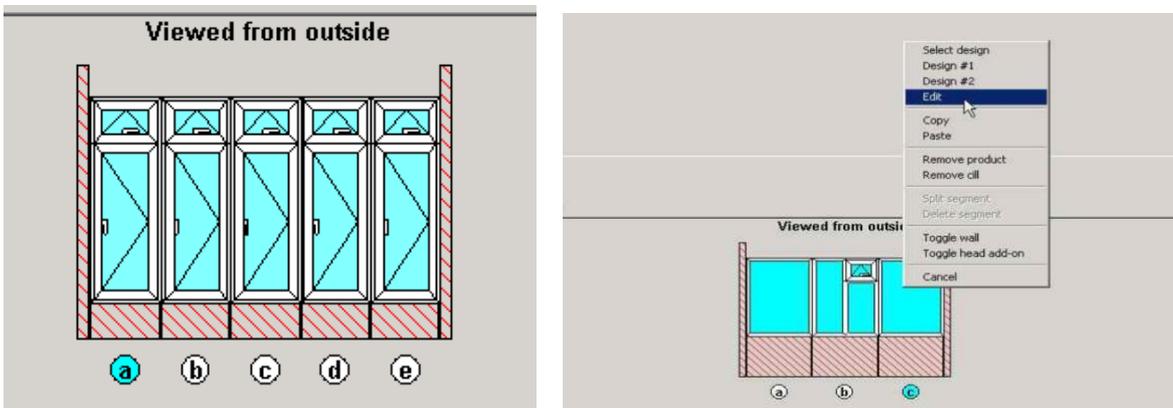
The next part of the cill is another 'Cill user angle'. This time the cill will be going back towards the wall.



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

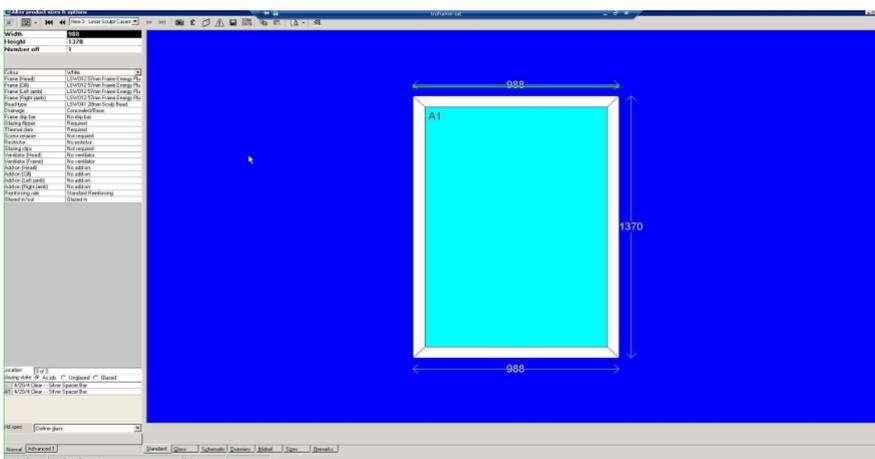


After all of the segments for the cill have been created, you can select the design and edit them. Simply hover over the design you wish to edit and right click. Choosing "Select design" allows you to choose different designs and "Edit" allows you to edit the selected design.



The cills should have now been added to the brickwork. A 5-segment cill has been created, each at 600mm with an angle of 135 degrees.

Now the product can be altered in the usual way.



Dimensions are not changeable in these options. To do this, change them in the parent options.

If at any time you need to alter the wall height of each individual frames you can do so. Below shows a diagram of the option that requires editing.

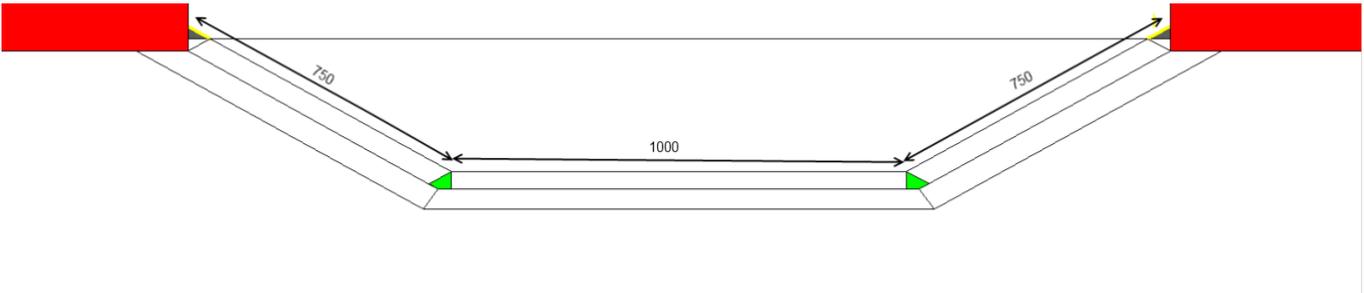
Individual cill segments				
Ref	Length int	Length ext	Wall height	Locked
a	600	662		<input type="checkbox"/>
b	600	724		<input type="checkbox"/>
c	600	724		<input type="checkbox"/>
d	600	724		<input type="checkbox"/>
e	600	662		<input type="checkbox"/>



Wall height option to the left will always have to be the difference between the highest frame and the frame required on the welded cill.

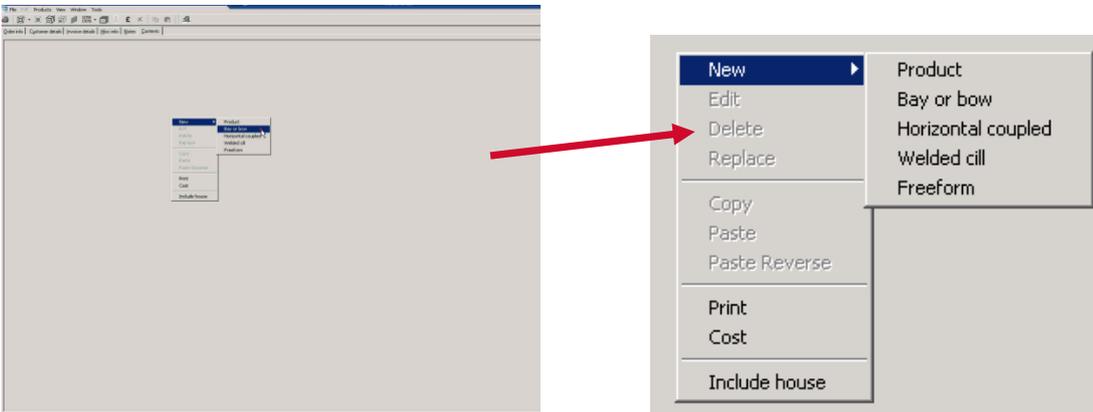
### 3.3: Creating a Bay or Bow

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.

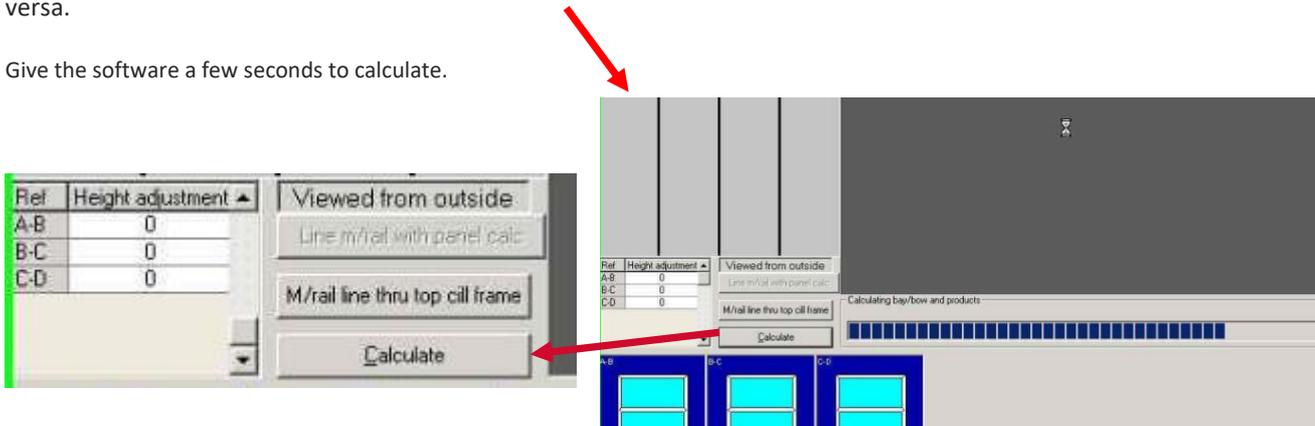


Now that the bay or bow has been created, set the dimensions. Set the cill lengths first, followed by the projections or angles, (dependent on which one is chosen, the opposing one will be calculated). **ONLY FILL ONE OF THE OPTIONS**

	Cill lengths	Projections	Angles	Common pts
A-B	750	B-P	ABC 135	
B-C	1000	C-Q	BCD 135	
C-D	750			

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

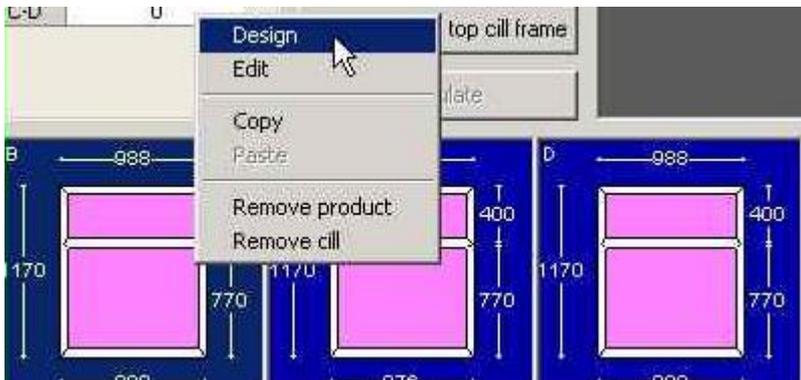
Give the software a few seconds to calculate.



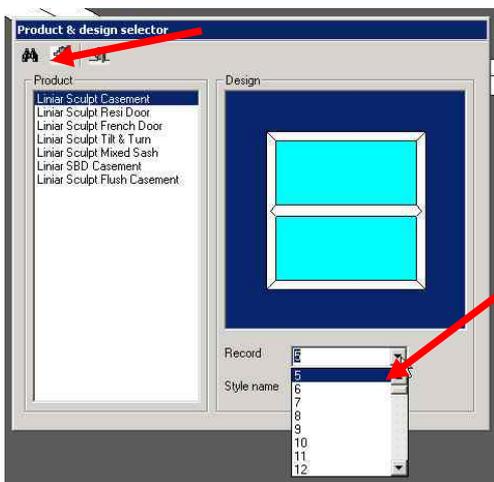
Once the dimensions are all set, start working on the frames.

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

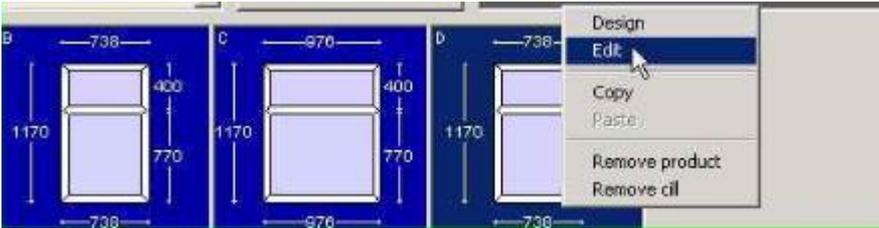
Select the type of product needed then select design.



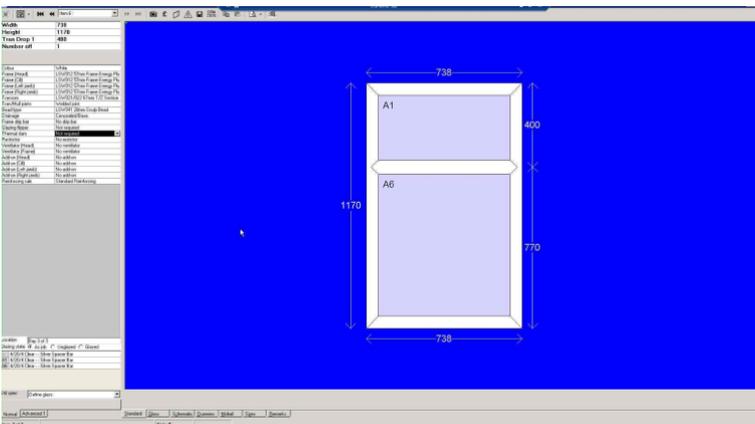
This will bring up the list of designs. Scroll through the different styles of this design using the binoculars, or the 'Record' bar.



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

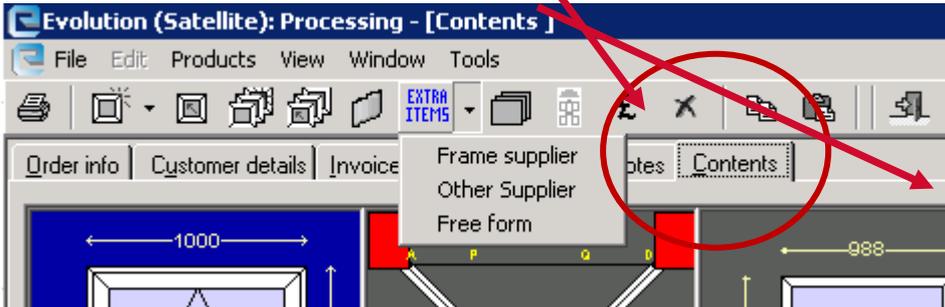
To have no cill on the bay at all, be sure that 'No cill' has been selected for both the parent options and each of the frames options.

Options		Referenc
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	
Trans/Mull joints	Welded joint	
Bead type	W041 28mm Sculp Bead	
Cill	LSL150 150mm Cill	
Drainage	Concealed/Base	
Frame drip bar	No drip bar	
Glazing flipper	Not required	
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
Cill length	Projections	Angles
		Components

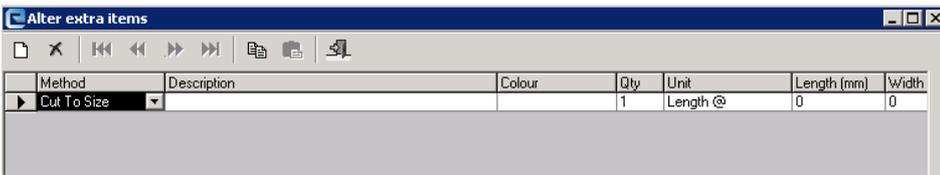
### 3.4: Adding Additional Items

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.

Method	Description	Colour	Qty	Unit	Length (mm)	Width
Area	LCW011W 57mm L	White	1	Off	6000	0

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.

- \*\* All part types \*\*
- Liniar Outer Frames
- Liniar T Sections**
- Liniar Z Sections
- Liniar Reinforcing (Units)
- Liniar Patio Door Sections
- Liniar Patio Accessories
- Liniar Patio Kits

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.

- \*\* All colours \*\*
- White
- Mahogany
- Mahogany on White
- (REV) Mahogany/White
- Golden Oak
- Golden Oak on White
- (REV) Golden Oak/White

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.

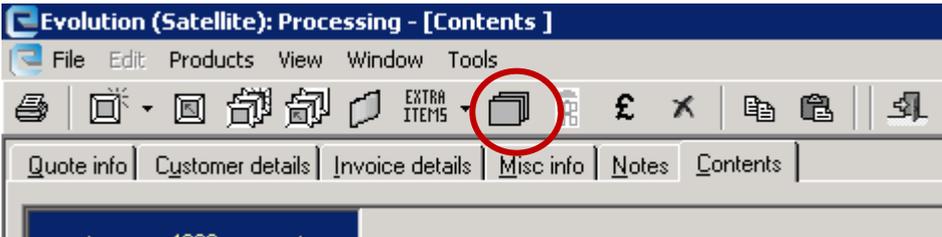
Qty	Unit	Length (mm)	Width (mm)	Height (mm)	Unit	NETT Price	Override	Cost base SAT
1	Length @	0	0	0	Per/M	£0.00	<input type="checkbox"/>	£0.00

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

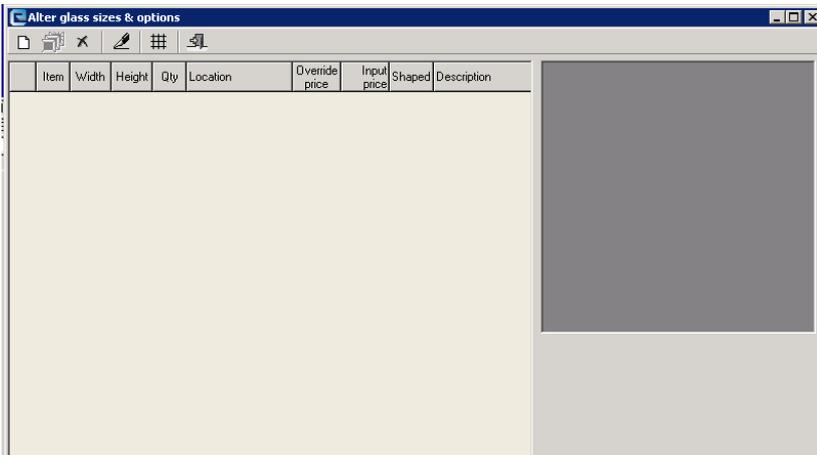
Qty	Unit	Length (mm)	Width (mm)	Height (mm)	Unit	NETT Price	Override	Cost base SAT
1	Length @	600	20	20	Each	£20.00	<input checked="" type="checkbox"/>	£0.00

### 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

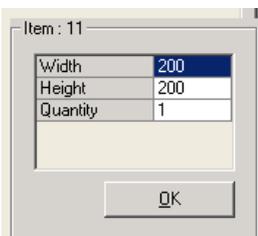


-Edit item (Edits the general options of the item)

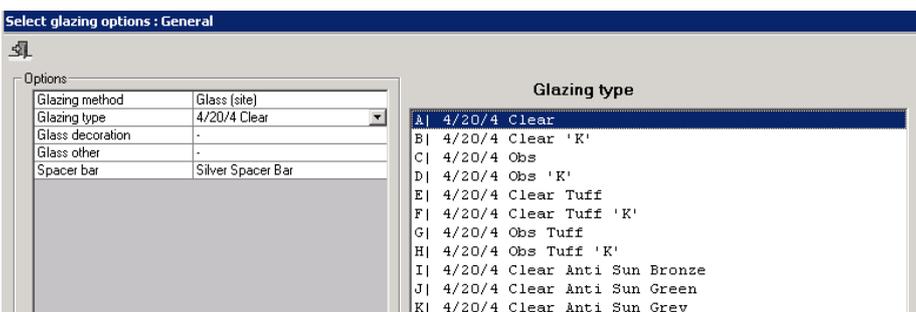


-Modify Glass decoration

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

EXTRA ITEMS

Quote info Customer details Invoice details Misc info Notes Contents

Liniar 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 nett
1	Liniar 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

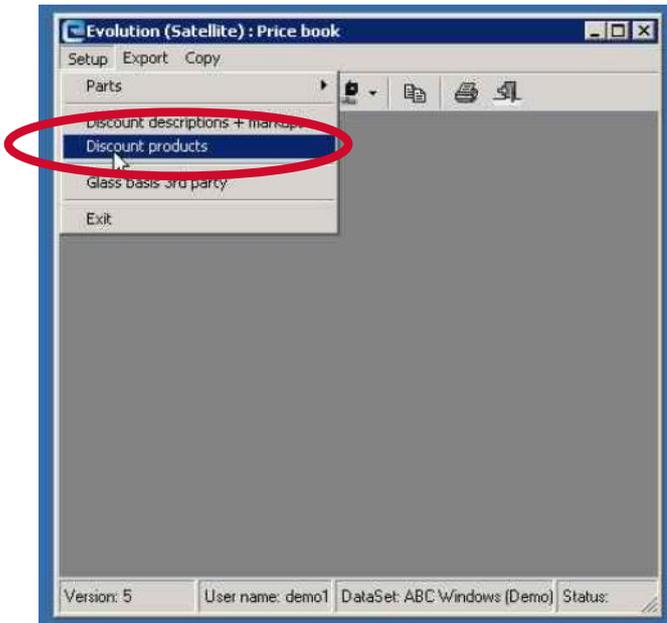
Begin by going to the starting screen and select, 'Price book'



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'

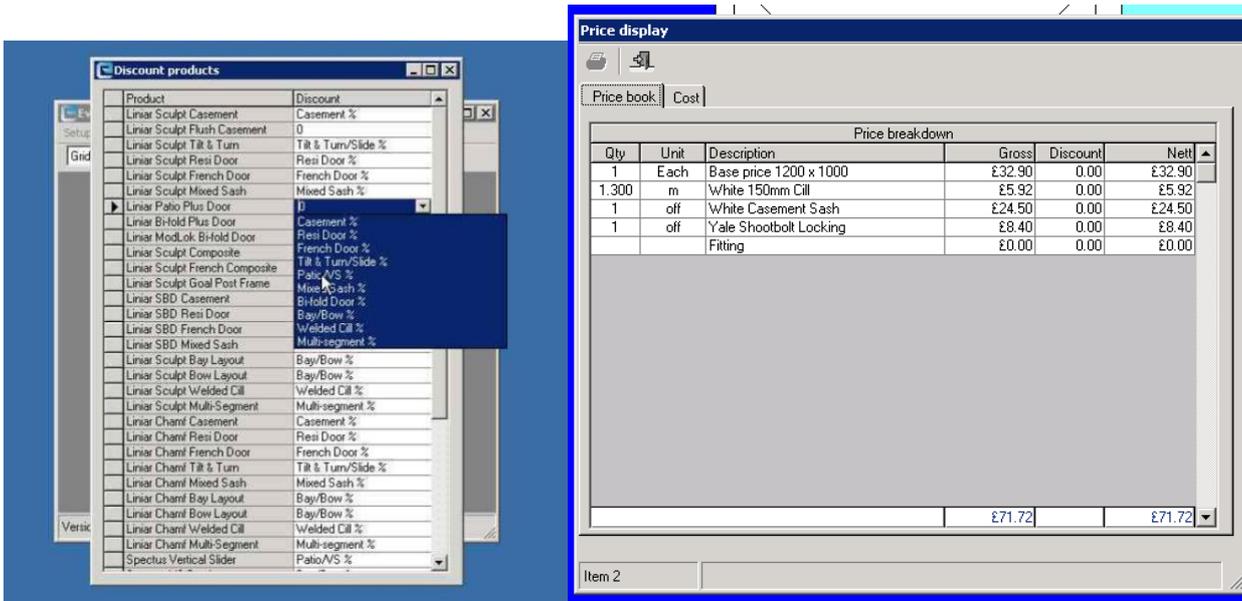


The next screen is where the options are changeable. Below, some of the discount products are set to zero (Left) Meaning that the corresponding discount on the invoice details (right) would not be able to pick up this discount price.

Product	Discount
Linear Sculpt Casement	Casement %
Linear Sculpt Flush Casement	0
Linear Sculpt Tilt & Turn	Tilt & Turn/Slide %
Linear Sculpt Resi Door	Resi Door %
Linear Sculpt French Door	French Door %
Linear Sculpt Mixed Sash	Mixed Sash %
Linear Patio Plus Door	Patio/VS %
Linear Bi-fold Plus Door	Bi-fold Door %
Linear Mod.ck. Bi-fold Door	0
Linear Sculpt Composite	0
Linear Sculpt French Composite	0
Linear Sculpt Goal Post Frame	Resi Door %
Linear SBD Casement	Casement %
Linear SBD Resi Door	Resi Door %
Linear SBD French Door	French Door %
Linear SBD Mixed Sash	Mixed Sash %
Linear Sculpt Bay Layout	Bay/Bow %
Linear Sculpt Bow Layout	Bay/Bow %
Linear Sculpt Welded Cill	Welded Cill %
Linear Sculpt Multi-Segment	Multi-segment %
Linear Chamf Casement	Casement %
Linear Chamf Resi Door	Resi Door %
Linear Chamf French Door	French Door %
Linear Chamf Tilt & Turn	Tilt & Turn/Slide %
Linear Chamf Mixed Sash	Mixed Sash %
Linear Chamf Bay Layout	Bay/Bow %
Linear Chamf Bow Layout	Bay/Bow %
Linear Chamf Welded Cill	Welded Cill %
Linear Chamf Multi-Segment	Multi-segment %
Spectus Vertical Slider	Patio/VS %

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

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

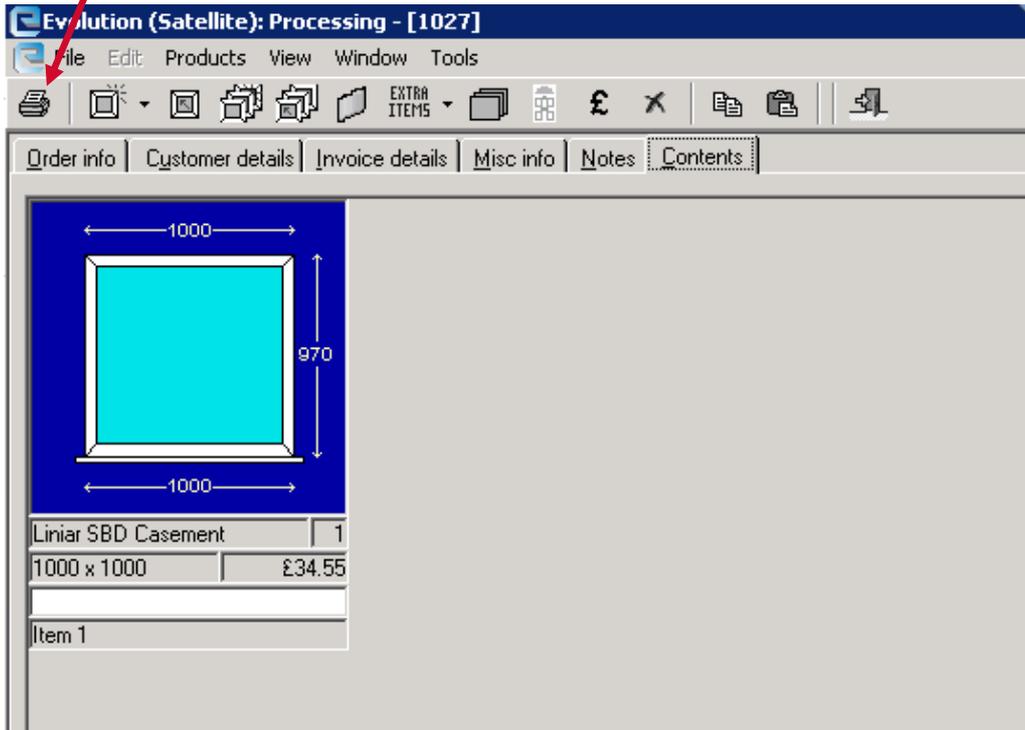


Once all of the discounts have been changed to match requirements, use the 'Exit' button to revert back to the previous screen. Then exit the programme completely and restart it to put changes into place.

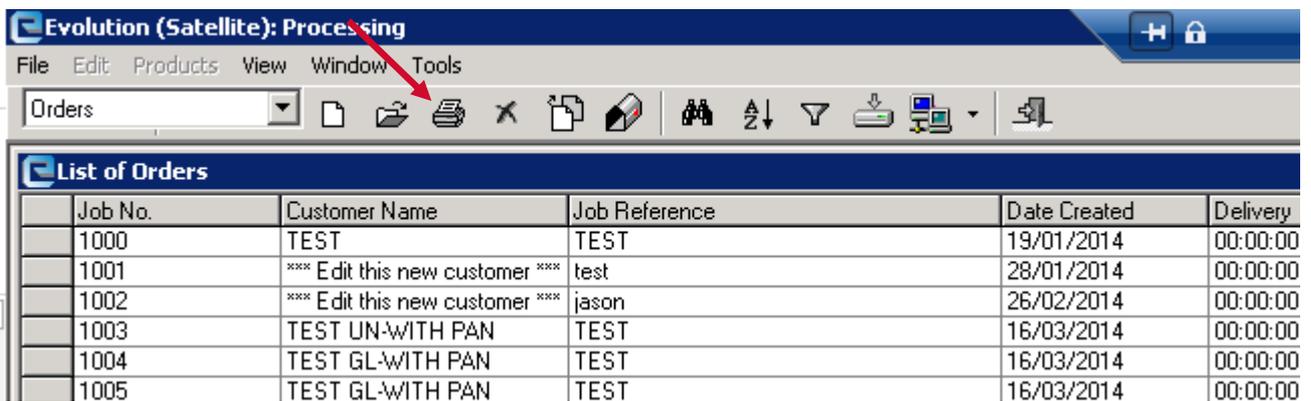


## Section 4: Printing Documents\Reports

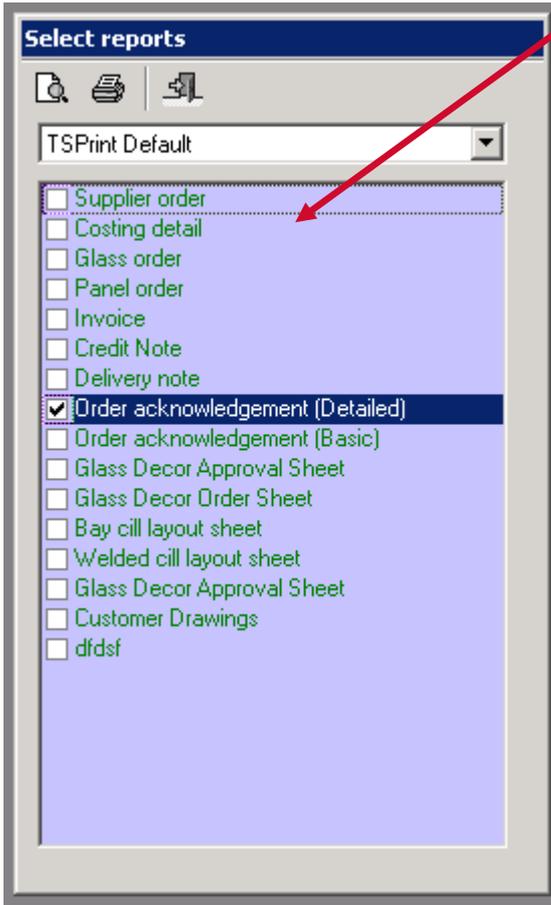
When you have returned to the contents screen, you may want to print out a job report. You can do this while still in the job, by clicking the 'Print' button



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.

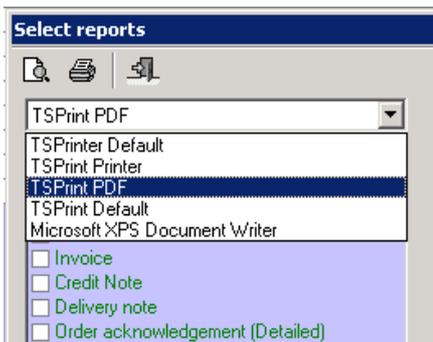


Preview the selected documents before printing



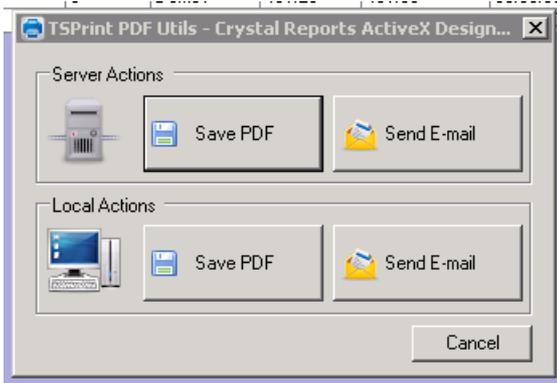
Print the selected documents, to the selected printer.

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.

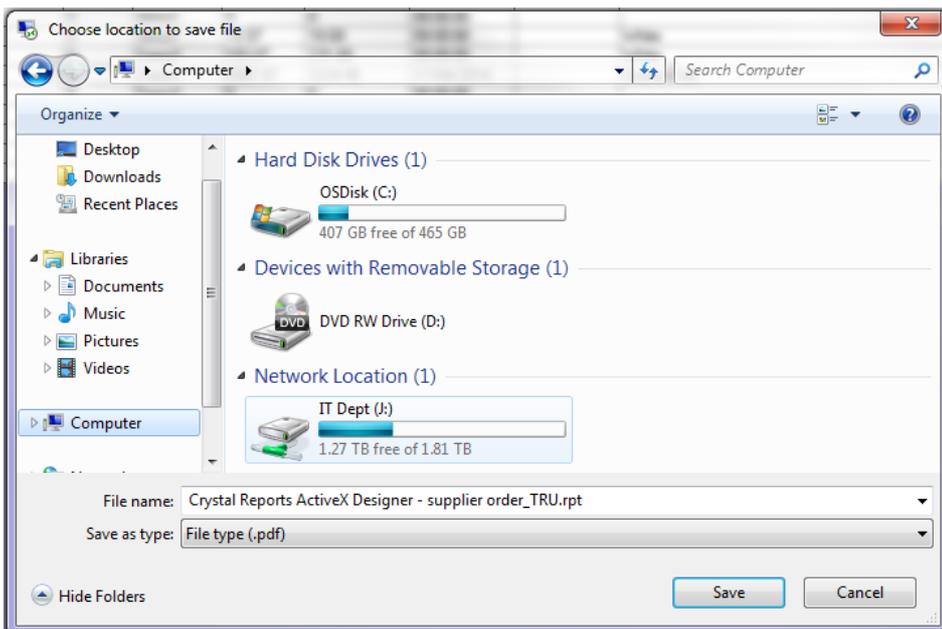


A few moments later the following should appear select Save PDF under 'Local Actions'

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: 3<sup>rd</sup> 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'



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 Tuff 'K'	£0.00	(/MSQ) Area (real)	28	<input type="checkbox"/>			
4/20/4 Obs Tuff '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 Tuff Softcoat	£0.00	(/MSQ) Area (real)	28	<input type="checkbox"/>			
4/20/4 Obs Tuff Softcoat	£0.00	(/MSQ) Area (real)	28	<input checked="" type="checkbox"/>			
4/20/4 Clear	£0.00	(/MSQ) Area (real)	28	<input type="checkbox"/>			
4/20/4 Obs	£0.00	(/MSQ) Area (real)	28	<input checked="" type="checkbox"/>			
4/20/4 Clear Tuff	£0.00	(/MSQ) Area (real)	28	<input type="checkbox"/>			
4/20/4 Obs Tuff	£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 Tuff Optwhite	£0.00	(/MSQ) Area (real)	28	<input type="checkbox"/>			
4/20/4 Obs Tuff 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 Tuff Anti Sun Bronze	£0.00	(/MSQ) Area (real)	28	<input type="checkbox"/>			
4/20/4 Clear Tuff Anti Sun Grey	£0.00	(/MSQ) Area (real)	28	<input type="checkbox"/>			
4/20/4 Clear Tuff 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 (rea	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 thick
(/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 H
-	£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   <b>Spacer bar</b>   Miscellaneous				
	Description	Cost	Cost calc	XML code
▶	Silver Spacer Bar	£0.00	(/M) Perim (real)	

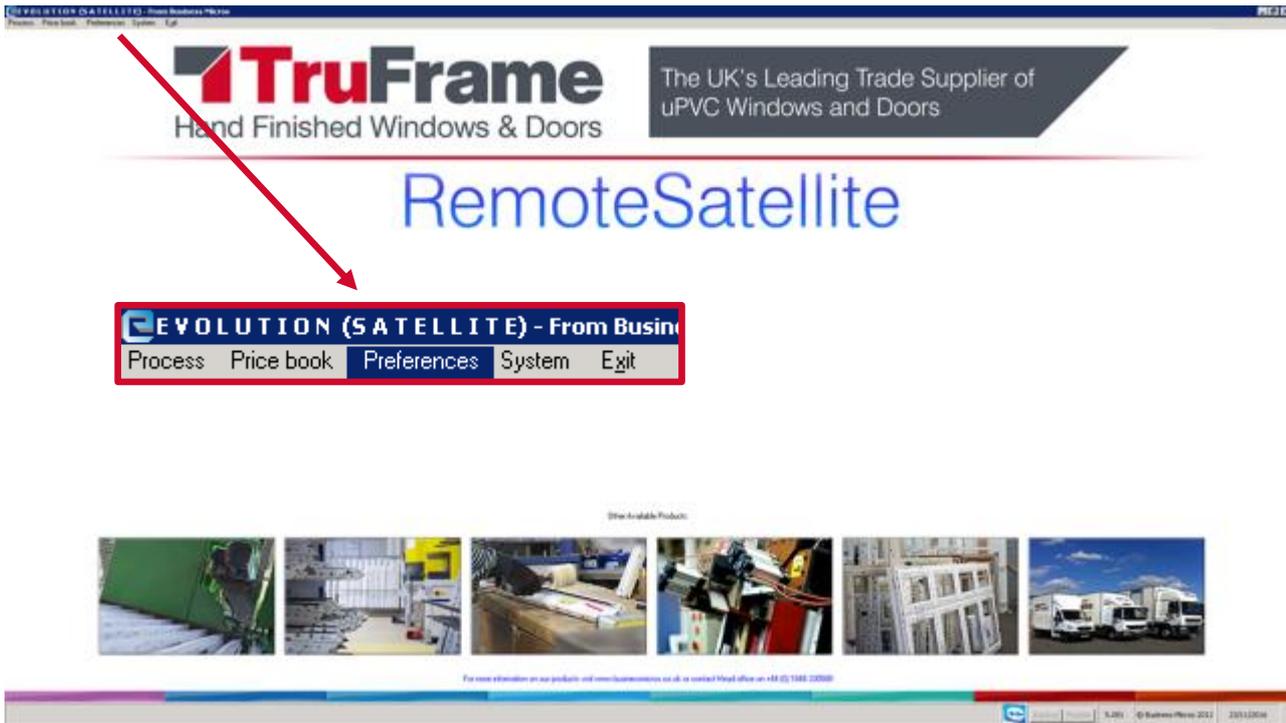
Spacer bar options.

Glass type   Pattern   Decoration   Glass other   <b>Spacer bar</b>   Miscellaneous		
	Description	Value
	Minimum glass area to cost for (m <sup>2</sup> )	0.30
	Minimum glass area to price for (m <sup>2</sup> )	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: 3<sup>rd</sup> Party Panel Supplier Setup

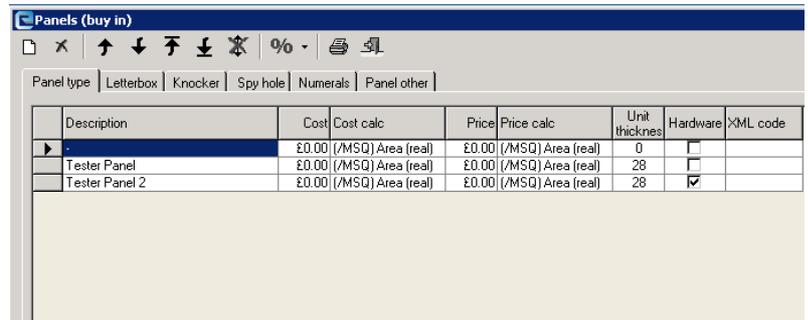
To set up costs and prices for your panels, go to the start-up screen and choose **Preferences**.



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



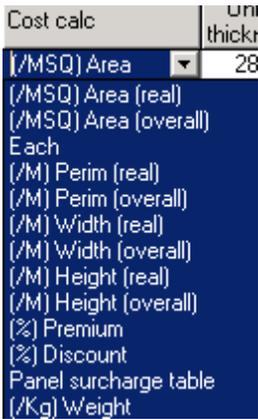
Now that you have done that you will be brought to this screen



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

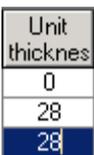
- Create new panel item
- Move item to top/bottom of list
- Print the panel information
- Delete panel item from list
- Reset the order of the list
- Go back to preferences
- Move item up/down by one
- Increase cost/price of items

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



Cost 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 3<sup>rd</sup> party glass set up, panels have both a cost and price column to allow more flexibility.



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



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**

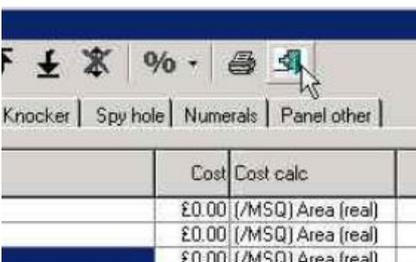
Description	Cost	Cost calc	Price	Price calc
-	£0.00	(/MSQ) Area (real)	£0.00	(/MSQ) Area (real)
Panel Other Options	£0.00	(/MSQ) Area (real)	£0.00	(/MSQ) Area (real)

**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 **3<sup>rd</sup> 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.

Discount	Value
Caseament %	-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.

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	-50.00	£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
			<b>£31.59</b>		<b>£47.38</b>

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

The screenshot shows the 'Evolution (Satellite): Processing - [1030]' window. The 'Pricing' dropdown menu is open, showing three options: 'Cost+markup grid', 'Cost+markup grid', and 'Manually input'. A red arrow points to the 'Manually input' option. Other fields include Job number 1030, Name RETAIL CUSTOMER 1, and various checkboxes for job status.

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

The screenshot shows the 'Evolution (Satellite): Processing - [1030]' window with the 'Invoice details' tab selected. The 'Selling price ex tax' field is set to £156.82 and the 'Selling price inc tax' field is set to £188.18. A table of discounts is visible on the right.

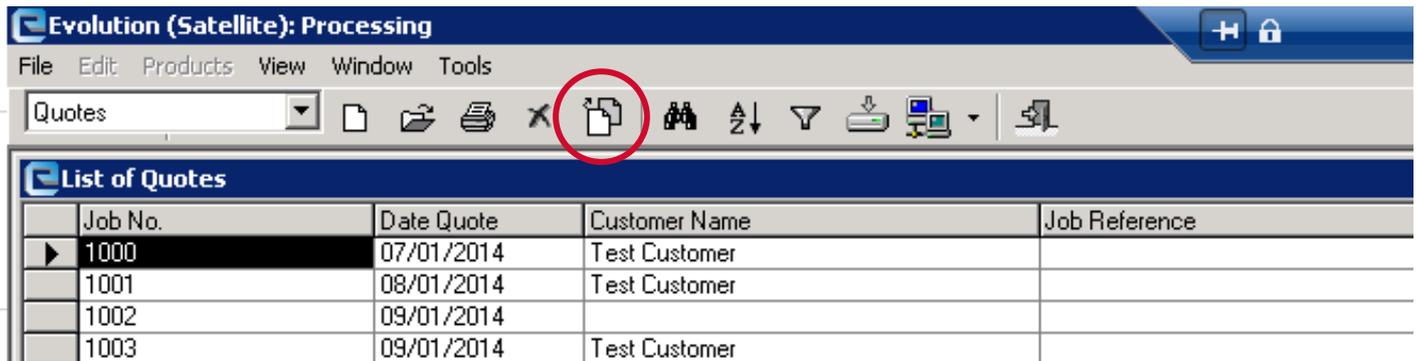
Discount	Value
Casement %	-50
Resi Door %	0
French Door %	0
Tilt & Turn/Slide %	0
Patio/VS %	0
Mixed Sash %	0
Bi-fold Door %	0
Bay/Bow %	0
Welded sill %	0
Multi-segment %	0
3rd party glass	0
3rd party panels	0
Discount part extra	0

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

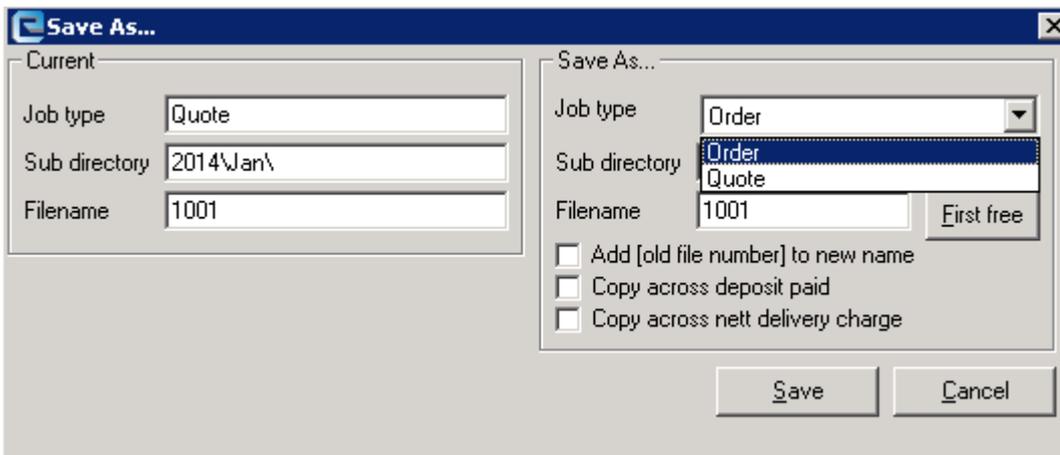
## Section 8: Transferring Quotes to Orders

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 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.



### Section 9: Ordering from TruFrame

Orders can be placed directly with TruFrame using the software, in the list of orders highlight the job you wish to order and click on 'Pass order to supplier' on tool bar.

Job No.	Customer Name	Job Reference	Date Created	Delivery	QTY Frames	QTY Glass
1000	TEST	TEST	19/01/2014	00:00:00	5	14
1001	**** Edit this new customer ****	test	28/01/2014	00:00:00	1	4
1002	**** Edit this new customer ****	jason	26/02/2014	00:00:00	5	13
1003	TEST UN-WITH PAN	TEST	16/03/2014	00:00:00	4	3
1004	TEST GL-WITH PAN	TEST	16/03/2014	00:00:00	1	0
1005	TEST GL-WITH PAN	TEST	16/03/2014	00:00:00	1	0
1006	TEST UN-WITH PAN	TEST	25/03/2014	00:00:00	1	0
1007	RETAIL #1	test	25/03/2014	00:00:00	7	7
1008			28/03/2014	00:00:00	0	0
1009	CUSTOMER NAME	REFERENCE	10/04/2014	10/04/2014	0	0
1010	CUSTOMER NAME	REFERENCE	10/04/2014	00:00:00	2	3
1015	RETAIL #1	Test	11/04/2014	00:00:00	1	2
1016	RETAIL #1		11/04/2014	00:00:00	0	0
1017	RETAIL #1		11/04/2014	00:00:00	0	0
1018	RETAIL #1	?	11/04/2014	00:00:00	1	1
1020	RETAIL #1	vczvcvz	14/04/2014	00:00:00	1	1
1021	RETAIL #1	123	14/04/2014	00:00:00	15	19
1022	RETAIL CUSTOMER 1	123	15/04/2014	00:00:00	1	2
1024	RETAIL CUSTOMER 1	TEST	17/04/2014	00:00:00	1	1

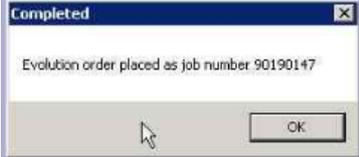
1. A screen should pop up asking you for the password, this will be the same password used to log on to the system.



2. Now you enter the desired delivery date. Please note – this must be one of the agreed delivery days.



3. After around 20 seconds a pop up will be displayed containing the TruFrame order number, please make a note of this for future reference.



If the order confirmation has not been received within a short time, please query this with the processing department in case a technical issue has prevented your from being received correctly.

## Section 10: Troubleshooting

### *The system is asking for a username or password and I do not know what they are*

During the installation of the software we usually create a folder on the computer desktop called **TruFrame**. In here you will find a text document titled 'CREDENTIALS' which contains your user credentials. If this is not the case, please contact TruFrame's Technology Department.

### *The program crashes and sometimes I lose work*

If an issue can be re-created then we will pass the information to Business Micros for them to fix it ready for the next version. To avoid programs crashes, let it finish what is doing before clicking anything else, for example; when changing glass options wait for the program to finish updating the glass list before pressing the exit button. If the program has crashed, to reduce the chance of losing work, leave it for 3 minutes then log back in and open the job that it crashed on. The program will attempt to restore any lost data, although, there is still the possibility to lose some data. If processing a large job, when you reach a certain point close the job and re-open it, this will ensure the job information has been saved and if it then later crashes you will not lose all of the job contents.

### *Printing no longer works*

The printing software **TS Print** will need to be re-installed on your computer. Please contact TruFrame's Technology Department who will do this for you.

### *The program is telling me a job is locked by someone*

When a job is being edited the program 'locks' the job file to prevent anybody else from attempting to edit, print or delete it. However, if the program has crashed with the job open the 'lock' status remains in place. To solve this, highlight the locked job and then select **unlock** from the **Tools** menu at the top of the job list screen. The program will warn you about possible data loss, however in most cases nothing will be lost. Press **Ok**, the program will inform you the job has been unlocked.

### *When closing a job, a message appears informing me there are no discounts set*

The job has for some reason become corrupted and the program has not been able to set your TruFrame discounts i.e. the frame costs calculated will be not be discounted. There is currently no solution for this problem, the job will should be deleted and re-input from scratch...