



INSTRUCTION MANUAL

For:

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For LITE Eye Help Desk call Stergis Windows & Doors at 1-888-Stergis

For user questions (508) 455-0661 ext: 203

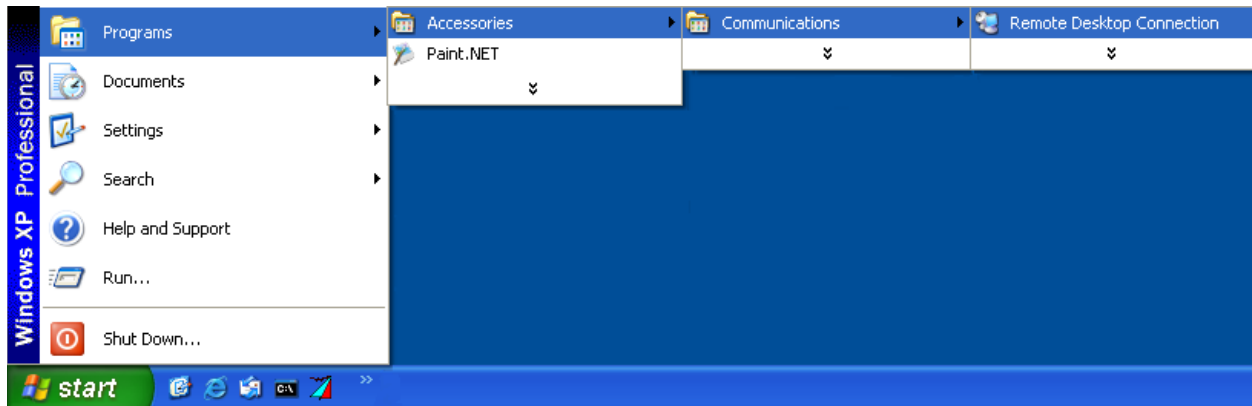
User Name:

Password:

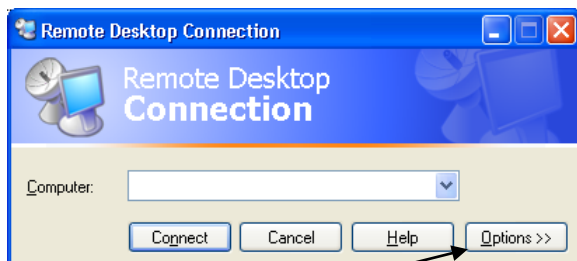
Getting Started

The *Winsys Lite Eye* is accessed via Remote Connection software included with Windows XP. Non-XP users may download the latest Microsoft Remote Desktop Connection software free of charge from www.microsoft.com/windowsxp/downloads/tools/rdclientdl.msp.

Remote Desktop Connection Configuration



Go to: Start → Programs → Accessories → Communications → Remote Desktop Connection



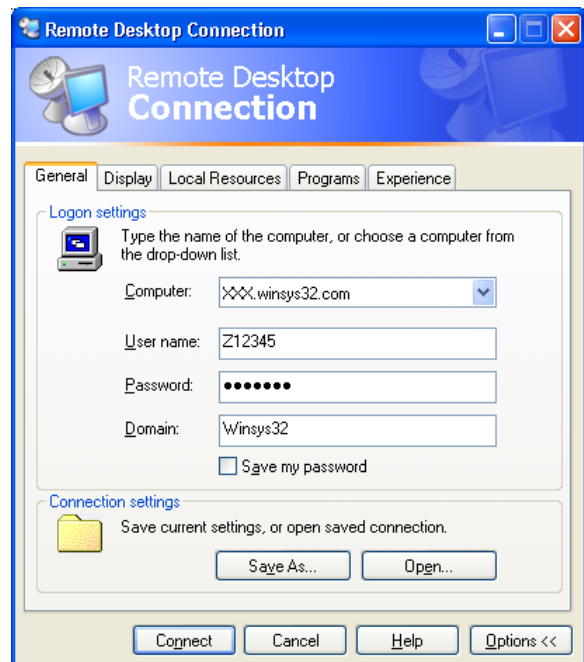
Click *Options* to enter all Logon settings.

Computer: Stergis.winsys32.com

User Name: XXX

Password: The master password assigned by the factory and not user changeable

Domain: winsys32.com

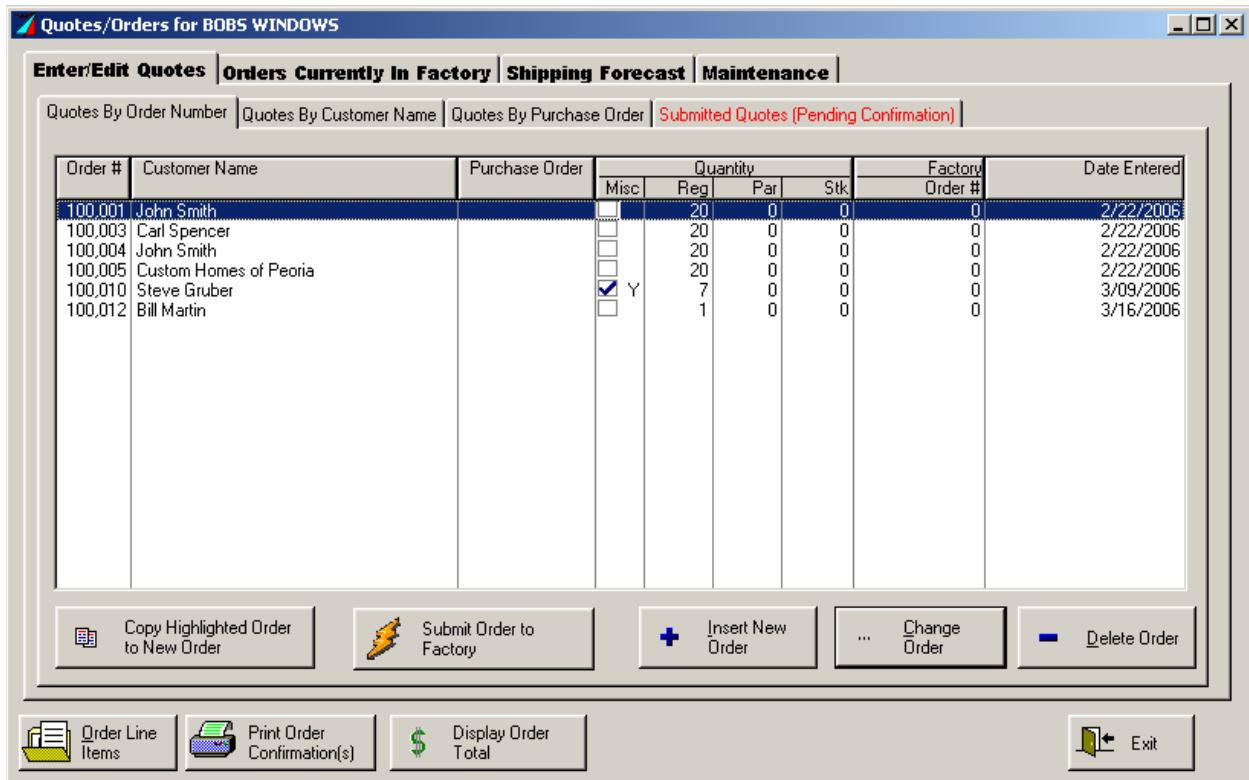


Click **Connect** to logon to the server and start *Winsys Lite Eye*.

Logging into Winsys Lite Eye



Enter *Login* and *Password* and click *OK* to start *Winsys Lite Eye*.



The first screen to come up after logging in is the Enter/Edit tab with a list of quotes.

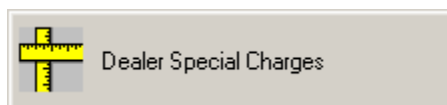
Go to the Maintenance tab to configure *Winsys Lite Eye* before use.

Maintenance

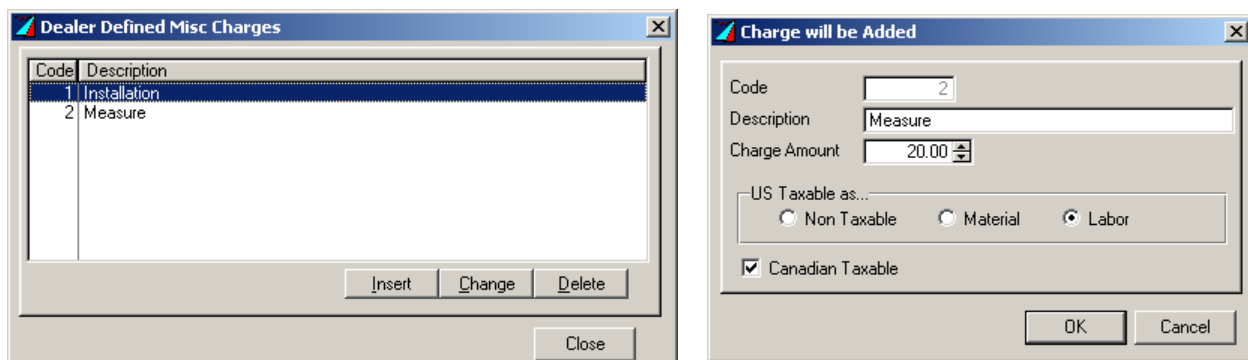
Click the *Maintenance* tab to configure charges and settings for generating quotes.



Dealer Special Charges

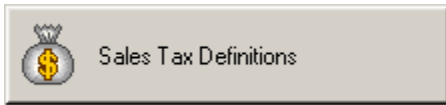


Click the *Dealer Special Charges* button to build a list of charges you will pass on to customers.

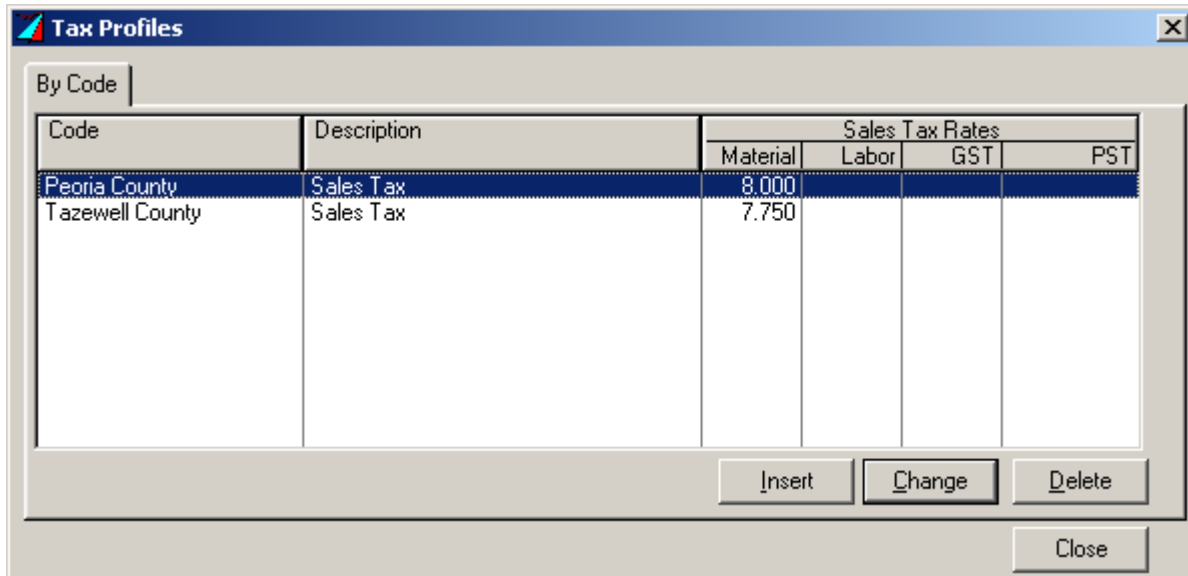


Click *Insert* to add a charge(see above for examples). Type in information, then click *OK*.

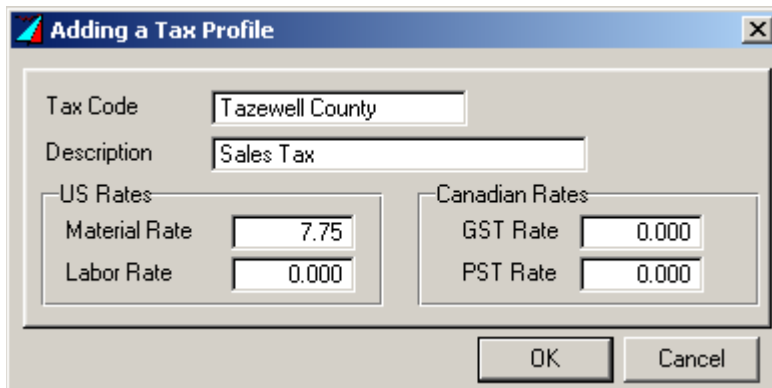
Sales Tax Definitions



Click the *Sales Tax Definitions* button. A list of Tax Profiles appears.

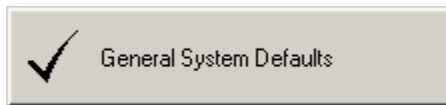


Click *Insert* to enter new sales tax codes.
(These will be assigned to customers later)



Type in information, then click *OK* to add it to the list.

General System Defaults



Click the *General System Defaults* button. The System Wide Options Update window appears.

General Information (1st tab)

Login / Password: The Login Name and Password assigned by the factory is the default. Both can be changed here. The password should be changed to something easier to remember and to protect pricing information, if that feature is enabled.

To Access Pricing Information: Enter *Winsys Lite Eye* “Master Password” from the factory to access pricing information.

Confirmation Report Title: Type in company name/header only if you want it to appear at the top of your confirmations. If you leave it blank, the default is “Customer Quotation”.

Boilerplate Order Confirmation Text: This will appear at the bottom of all confirmations e.g., “This is a quote, and only a quote, until an order is confirmed.”

When finished, click **OK**.

Pricing/Additional Information (2nd tab)

System Wide Options Update

General Information | **Pricing/Additional Information**

Pricing Default

Markup %

Discount %

Additional Flat Dollar Amount

Add Amount

A-Add to Base Price Before Discount

B-Add as Additional Dollar Amount

Make Master Password Required to Edit Pricing

Allow View of Profitability Analysis

Apply Addtl \$'s to Elements of Patterns

Do NOT apply discount to List Price before adding markup.

Consolidate All Order Entry 'Insert' Functions to a Single Button

Pricing Markup Profiles

Markup Profile	Markup %	Disc %	Addtl \$'s
Standard	100.00	25.00	0.00
Contractor	100.00	30.00	0.00

Do Not Default to a Pricing Profile for New Orders

Require User to Select a Valid Markup Profile

Require Dealer PO w/each Order

Up Charges Brackets are...

United Inches Square Feet

Offer Price/No Price Option when printing Confirmation

13

Pricing Default is the best pricing method if using the same list price and discount, and/or cost and markup for all customers.

Pricing Markup Profiles are more flexible. They allow you to have multiple pricing discounts, price options with different discounts, and/or price by united inch ranges. The Pricing Default section will be used if a profile is not specified on a quote.

Make Master Password Required to Edit Pricing: Checking this box will require the master password to be entered on the General Information tab to access this Pricing Information.

Allow View of Profitability Analysis: Enables the Profitability Analysis button at order entry, which, allows you to compare cost versus sell price.

Apply Addtl \$'s to Elements of Patterns: The Add Amount is applied to each unit of a pattern, instead of just once for the pattern.

Do NOT apply discount to List Price before adding markup: The Markup and Discount are applied to the list price, not cost.

Consolidate All Order Entry 'Insert' Functions to a Single Button: This combines both Configurator and Custom buttons into a single button for order entry.

Do Not Default to a Pricing Profile for New Orders: All new orders will set to the first Pricing Markup Profile, unless checked.

Require User to Select a Valid Markup Profile: This disables the Pricing Default section and requires a selection from the Pricing Markup Profiles to generate a quote. Check this if you only want to use profiles.

Require Dealer PO w/ each Other: Marking this will require a PO number in the order header before adding line items to a new quote.

Up Charges Brackets are...

United Inches: Additional Base \$'s and Cost Basis Adjustments are specified by united inches.

Square Feet: Additional Base \$'s and Cost Basis Adjustments are specified by square feet.

Offer Price/No Price Option when printing Confirmation: Check to activate a prompt to display prices on confirmations.

Default Markups for All Customers

Pricing Default:

Fill in markup and/or discount percentages. The Discount is calculated after the Markup. Up to two decimal places are allowed (e.g. 66.67).

Additional Flat Dollar Amount:

A – Adds the Add Amount to cost before markup and discount

B – Adds the Add Amount to the sell price after markup and discount

Pricing Default

Markup %

Discount %

Additional Flat Dollar Amount

Add Amount

A-Add to Base Price Before Discount

B-Add as Additional Dollar Amount

Customer Specific Markups

Pricing Markup Profiles:

These are the customer-specific pricing profiles you will create to enable you to generate a confirmation for your customer

General (1st tab)

You can select a default profile when adding a customer.

The screenshot shows a dialog box titled "Profile Will Be Added" with three tabs: "General", "Additional Base \$'s", and "Cost Basis Adjustment". The "General" tab is active. It contains the following fields and controls:

- Profile Name:** A text box containing "Contractor".
- Default Base and Option Sell Price Calculation:** A section containing two spinners: "Markup %" set to 100.00 and "Discount %" set to 33.00.
- Override Glass Options using...:** A checkbox (unchecked) followed by two spinners: "Markup %" set to 0.00 and "Discount %" set to 0.00.
- Override Grid Options using...:** A checkbox (unchecked) followed by two spinners: "Markup %" set to 0.00 and "Discount %" set to 0.00.
- Override Screen Options using...:** A checkbox (unchecked) followed by two spinners: "Markup %" set to 0.00 and "Discount %" set to 0.00.
- Override Other Options using...:** A checkbox (unchecked) followed by two spinners: "Markup %" set to 0.00 and "Discount %" set to 0.00.

At the bottom of the dialog are "OK" and "Cancel" buttons.

Assign a name that is customer specific or pricing specific e.g., Level 1, Level 2, or Level 3. Be aware that this will appear on all your confirmations.

The markup and discount for bases and options will be the same for products and options.

The override feature allows different markup and discounts to be specified for the different option types.

Additional Base \$'s (2nd tab)

Use this section to adjust the selling price of the base only. Bracket ranges will be in UI or SqFt, depending on which is specified in the Pricing Markup Profile.

Profile Will Be Added

General | **Additional Base \$'s** | Cost Basis Adjustment

Additional Dollar Amount
 Default Add Dollars: 0.00
 A-Add to Base Price Before Markup/Discount
 B-Add as Addtl Dollar Amt

UI Bracket Based Add Charges

UI From	UI To	Add Dollars
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00

Bay Window Addtl \$'s: 0.00
 Bow Window Addtl \$'s: 0.00

OK Cancel

Up Charges Brackets are...

United Inches Square Feet

Option A will add the *Default Add Dollars* to the list price, then discount the amount specified on the General tab.

Option B does not change the list price, but is applied after discount.

UI Bracket Based Add Charges specifies a range of united inches with different additional amounts added based on size. This will override the *Default Add Dollars*, if it has a value.

▲ OR ▼

Profile Will Be Changed

General | **Additional Base \$'s** | Cost Basis Adjustment

Additional Dollar Amount
 Default Add Dollars: 0.00
 A-Add to Base Price Before Markup/Discount
 B-Add as Addtl Dollar Amt

SqFt Bracket Based Add Charges

SqFt From	SqFt To	Add Dollars
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00

Bay Window Addtl \$'s: 0.00
 Bow Window Addtl \$'s: 0.00

OK Cancel

SqFt Bracket Based Add Charges specifies a range of square feet with different additional amounts added based on size. This will override the *Default Add Dollars*, if it has a value.

Bay and bow windows can have additional flat dollar markups.
 * Pattern file must be used for these.

Cost Basis Adjustment (3rd tab)

Additional amounts can be added to the costs, before the markup and discount calculations.

Profile Will Be Changed

General | Additional Base \$\$ | Cost Basis Adjustment

Cost Basis Adjustment

Basis Add \$\$ 0.00

Basis Add % 0.00

UI Bracket Based Basis Add Charges

UI From	UI To	Add Dollars
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00

Bay Window Addtl Cost \$\$ 0.00

Bow Window Addtl Cost \$\$ 0.00

OK Cancel

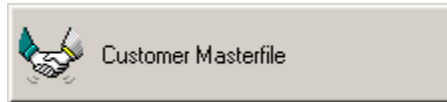
Cost Basis Adjustment adds an additional amount and/or percentage to the cost of the base.

UI Bracket Based Basis Add Charges specifies a range of united inches with different additional amounts added based on size. This will override the **Default Add Dollars**, if it has a value.

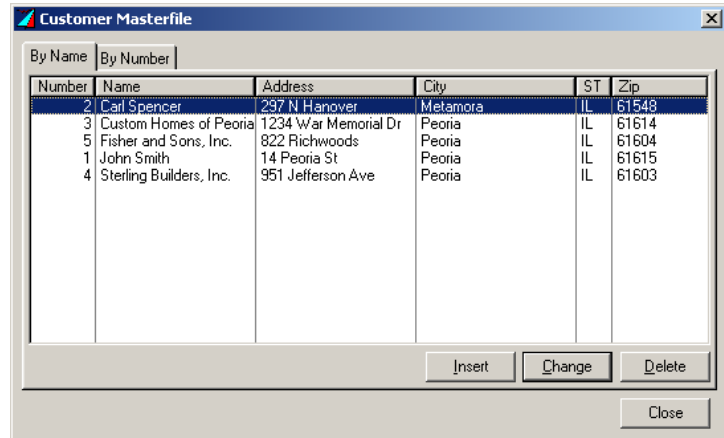
Bay and bow windows can have additional flat dollar markups.
* Pattern file must be used for these.

Customer Masterfile

Building Your Customer Database



Click the *Customer Masterfile* button.



Click *Insert* to add a new customer.

 A screenshot of a dialog box titled "Adding Customer". It contains several input fields and sections. A red rectangular box highlights the "Name / Address Information" section, which includes fields for Name, Address, City, State, and Zip. Other sections include "Contact Information" with fields for Customer Type, Work Phone, Alternate Work, Fax, Home Phone, Cell Phone, and Beeper. There are also dropdown menus for "Markup Profile" and "Tax Profile". At the bottom, there is a "General Notes" text area and a "Do Not Solicit" checkbox.

Customer Number: 3 Store Number: Sales Rep ID:

Name / Address Information (highlighted in red):
 Name: Custom Homes of Peoria
 Address: 1234 War Memorial Dr
 City: Peoria
 State: IL Zip: 61614

Contact Information:
 Customer Type: Builder
 Work Phone: 309-753-8462
 Alternate Work:
 Fax: 309-753-8467
 Home Phone:
 Cell Phone:
 Beeper:
 Email:

Markup Profile: Contractor
 Tax Profile: Peoria County

General Notes:
 contact Brad Thompson

Do Not Solicit OK Cancel

Choose a *Markup Profile* from the pricing markup profiles created earlier to specify the customer's default pricing. This can be overridden, if needed.

Choose a default *Tax Profile* if the customer is taxed on their purchases.

Name is the only required field.

Enter data (customer number is automatically assigned).

Use *Store Number* field for your current customer number.

General Notes is for your internal notes. The customer will not see these.

* *Only the information inside the red frame appears on confirmations.*

To Edit Existing Customer Information

Number	Name	Address	City	ST	Zip
2	Carl Spencer	297 N Hanover	Metamora	IL	61548
3	Custom Homes of Peoria	1234 War Memorial Dr	Peoria	IL	61614
5	Fisher and Sons, Inc.	822 Richwoods	Peoria	IL	61604
1	John Smith	14 Peoria St	Peoria	IL	61615
4	Sterling Builders, Inc.	951 Jefferson Ave	Peoria	IL	61603

Buttons: Insert, Change, Delete, Close

By Name (1st tab) displays customers alphabetically.

By Number (2nd tab) displays customers numerically.

To remove a customer, point/click to highlight, then click **Delete**.

To change customer information, point/click to highlight customer, then click **Change** (or double-click customer).

Customer Number: 1 Store Number: Sales Rep ID:

Name / Address Information:
 Name: John Smith
 Address: 14 Peoria St
 City: Peoria
 State: IL Zip: 61615

Contact Information:
 Customer Type: Homeowner
 Work Phone:
 Alternate Work:
 Fax:
 Home Phone: 309-688-3214
 Cell Phone:
 Beeper:
 Email:

Markup Profile: Standard
 Tax Profile: Peoria County

General Notes:

Do Not Solicit OK Cancel

Click **OK** when finished with making changes.

New customers can also be added at the Orders screen (begins on next page).

Enter/Edit Quotes

Click the *Enter/Edit Quotes* tab.

Quotes/Orders for BOBS WINDOWS

Enter/Edit Quotes | Orders Currently In Factory | Shipping Forecast | Maintenance

Quotes By Order Number | Quotes By Customer Name | Quotes By Purchase Order | Submitted Quotes (Pending Confirmation)

Order #	Customer Name	Purchase Order	Quantity				Factory Order #	Date Entered
			Misc	Reg	Par	Stk		
100,001	John Smith		<input type="checkbox"/>	20	0	0	0	2/22/2006
100,003	Carl Spencer		<input type="checkbox"/>	20	0	0	0	2/22/2006
100,004	John Smith		<input type="checkbox"/>	20	0	0	0	2/22/2006
100,005	Custom Homes of Peoria		<input type="checkbox"/>	20	0	0	0	2/22/2006
100,010	Steve Gruber		<input checked="" type="checkbox"/>	7	0	0	0	3/09/2006
100,012	Bill Martin		<input type="checkbox"/>	1	0	0	0	3/16/2006

Copy Highlighted Order to New Order | Submit Order to Factory | **Insert New Order** | Change Order | Delete Order

Order Line Items | Print Order Confirmation(s) | Display Order Total | Exit

To enter a new order, click *Insert New Order*.

The next quote number will be assigned automatically.

Order Header

General (1st tab)

Quote Number: 100,006

General | Misc/Other Charges | General Order Notes

Customer Information

Name: Custom Homes of Peoria

Address: 1234 War Memorial Dr

City State Zip: Peoria, IL 61614

Telephone: 309-753-8462 Dlr PO:

Ship To

BOBS WINDOWS

123 ELM STREET

Peoria, IL 61615

Order Date: 3/03/2006

Date Requested: 3/20/2006

Order Type: Contractor

Taxable? 1-Yes 2-No

Tax Profile: Peoria County

Comment

Order Deposit: \$0.00

OK Cancel

Click **Lookup Known Customers**, or manually enter customer information (only Name is required).

Dlr PO: Enter your PO number.

Date Requested: Assigned automatically to allow necessary lead-time, but can be changed to a later date for delayed deliveries (e.g., customer doesn't want it until 2 months later).

For **Rush Orders**, contact a sales rep after submitting at default date.

Change date to match the confirmation date when you receive it.

Order Type will display the customer-specific markup/discount profile.

Comment field will add notes to appear on the quote/order as "Special Instructions".

Click **OK** to go to the order entry screen, or click on 2nd and/or 3rd tabs in this screen if needed.

Misc Other Charges (2nd tab): Click here if additional charges need added to the order (e.g., raw materials, labor, or dealer defined charges).

General Order Notes (3rd tab): Click here to enter notes for your own reference. These will not appear on customer's confirmation or the confirmation from the factory.

Misc/Other Charges (2nd tab)

Quote Number: 100,006

General | Misc/Other Charges | General Order Notes

Factory Order #: 0 Rep ID: []

Part Number	Quantity	Description	Charge

Buttons: Insert, Change, Delete, Total Charges: 0.00, OK, Cancel

Click **Insert** to add detailed charges.

Charge Type (select either *Factory Charges* or *Dealer Charge*)

Charge Type

Factory Charges

Material Labor Expense

- *DF* - Dealer Charge

Part Number: 519 WHT ...

Description: SNAP IN TRACK FILLER

Quantity: 4.0 Unit Price (FEET): 2.0000

UOM: FEET -- Unit Discount: 0.50

Net Unit Price: 1.50

Total Price: 6.00

Buttons: OK, Cancel

Factory Charges: Material (default)
you will use this to add charges for miscellaneous lineals/accessory components

Part Number: Click ... button to view parts list; highlight your selection; click Select

Quantity: change if necessary; click **OK** (part will be added to order); click **OK** again to go to order-entry screen

UOM: Click drop-down to see if you can choose between units of measure

Charge Type

Factory Charges

Material Labor Expense

- *DF* - Dealer Charge

Charge #: 1 ...

Description: Installation

Quantity: 2.0 Unit Price: 40.0000

-- Unit Discount: 0.00

Net Unit Price: 40.00

Total Price: 80.00

Buttons: OK, Cancel

Click ... button for options (e.g., installation)

Click **OK** to return to order screen

To Order Custom Windows and Doors

Line	Pos	Product	Desc	Clr	Qty	Width	Height	Net Price
1		4010 001	Exelsior Double Hung	WHT	1	35 3/4	59 1/2	220.20
2		4010 001	Exelsior Double Hung	WHT	1	31 3/4	52 1/2	198.60
4		FFSH2438C	Single Hung	WHT	1	27 1/2	43 1/2	0.00
5		2001 045	Single Hung /w Fin	WHT	1	35 3/4	59 5/8	198.75
6		4012 001	Factory Twin	WHT	1	60 Even	60 Even	0.00
6	1	4010 001	Exelsior Double Hung	WHT		29 15/16	60 Even	198.60
6	2	4010 001	Exelsior Double Hung	WHT		29 15/16	60 Even	198.60

Option	Description	Color	Net Price
GL 13	Clear DS Top		36.00
GL 14	Clear DS Btm		36.00
GR 10	2V2H Top	WHT	11.40
GR 35	2V2H Bot	WHT	11.40
DT 9	W/2 Camlocks	WHT	0.00
SC 4	Full Aluminum	WHT	18.00

Total Line Item Price 333.00

Click the **Insert** button for windows and doors made to your specifications.

Examples of possible custom orders:

Example 1 – Custom Single Unit

Example 2 – Custom Pattern

Example 3 – Custom Single Unit using the Window Wizard

Example 1 – Custom Single Unit

Option	Clr	Desc	Net Price
GL 2		Clear Top	50.40
GL 4		Clear Btm	25.20
DT 9	WHT	W/2 Camlocks	0.00
SC 4	WHT	Full Aluminum	0.00

Base Option 198.60
Line Item Total 274.20

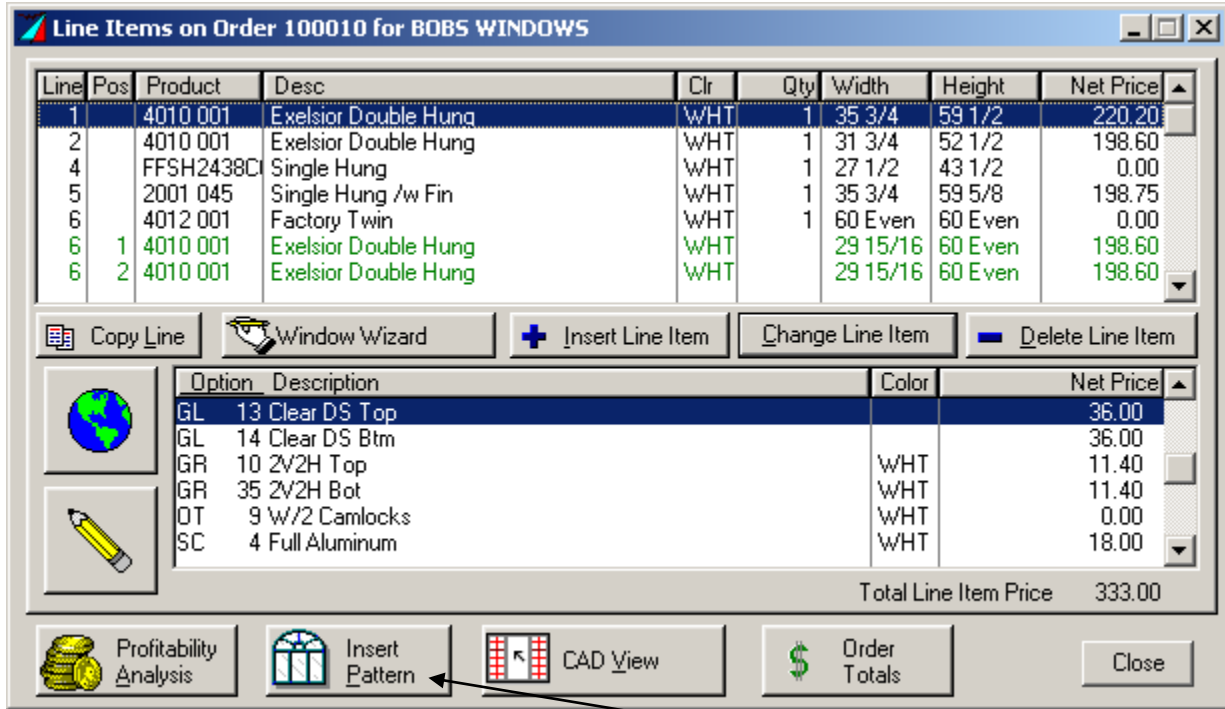
Click ... button to make a product selection or type in a model and choose the base type from the drop-down.

To view and select options click **Glass**, **Grid**, **Screen**, or **Other**.

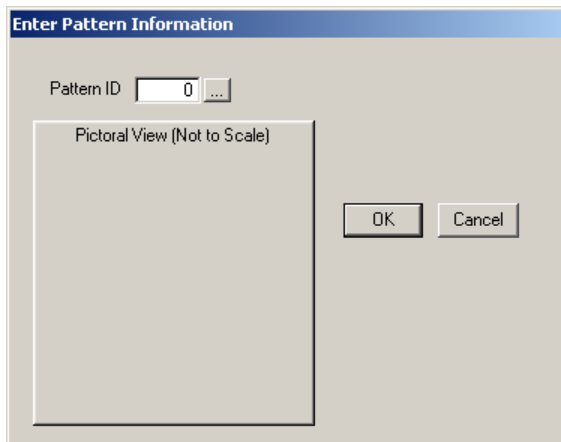
Click **Calculate Price** for pricing and size/side dependent options.

Click **OK** to return to the order entry screen.

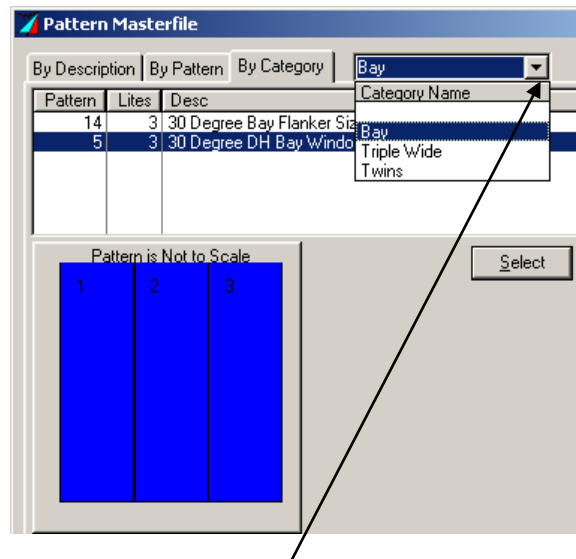
Example 2 – Custom Pattern



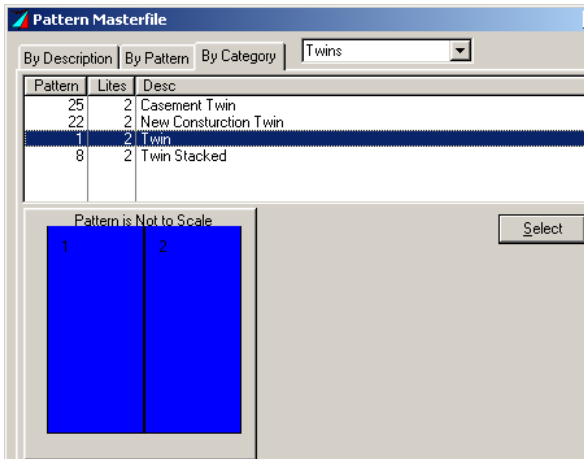
To select from our custom window combinations, click **Insert Pattern**.



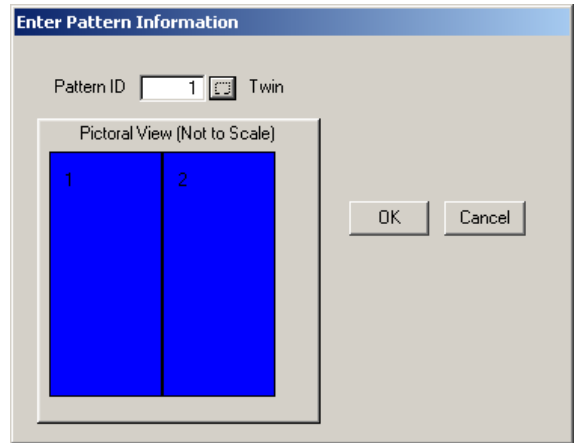
Click the ... button to view and select pattern options.



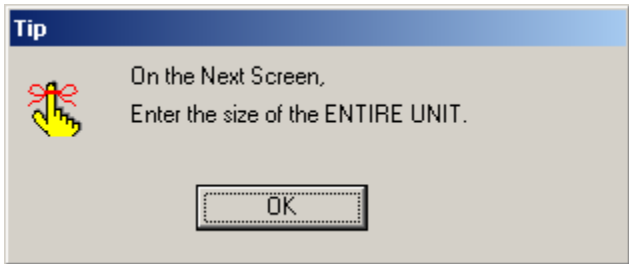
Click drop-down button to filter the display by category.



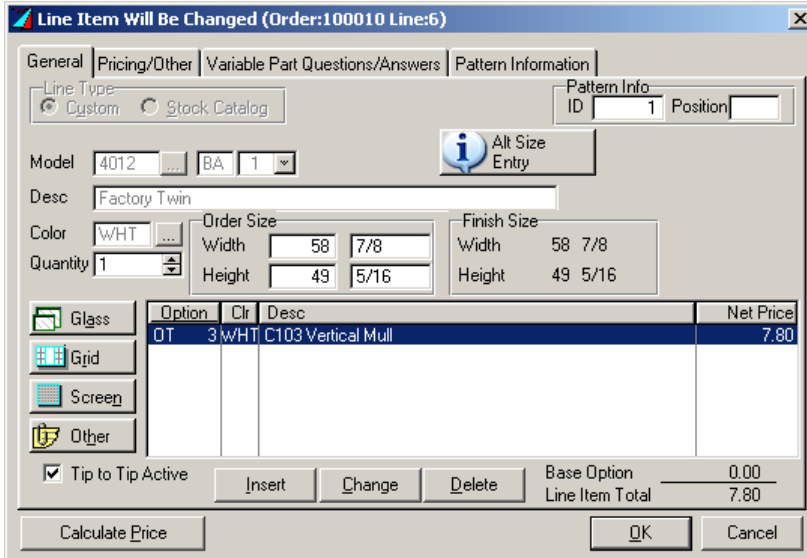
Highlight configuration, then click **Select**.



Click **OK**.



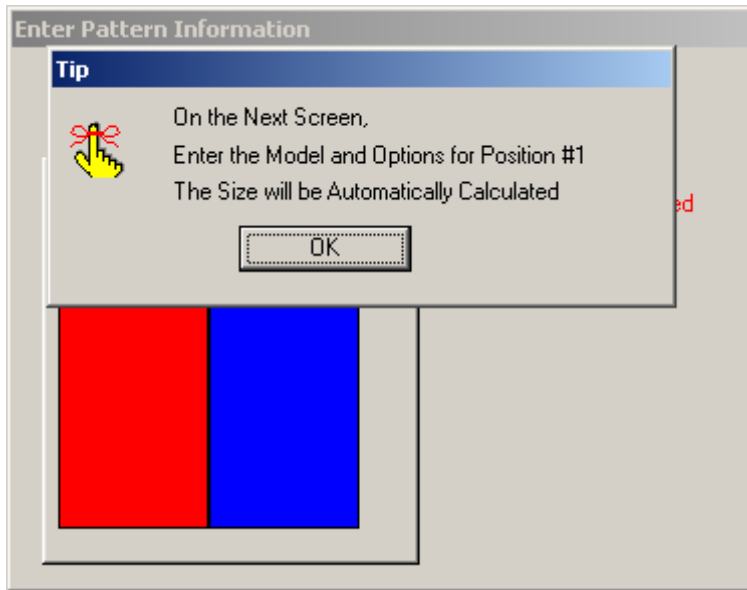
Click **OK**.



Enter custom dimensions.

Add options as needed.

Calculate Price, then click **OK** when finished.



Click **OK** to select options for window in position #1 (in red).

Line Item Will Be Changed (Order:100010 Line:3)

General | Pricing/Other | Variable Part Questions/Answers | Pattern Information

Line Type: Custom Stock Catalog

Pattern Info: ID 1 Position 1

Model: 7000 BA 1

Desc: Casement

Color: WHT

Quantity: 1

Order Size: Width 29 3/8, Height 49 5/16

Finish Size: Width 29 3/8, Height 49 5/16

Option	Clr	Desc	Net Price
GL 19		Clear Super Spacer	0.00
OT 9	WHT	Sill Extension	5.38
OT 13	WHT	Left Hand	0.00
OT 24	WHT	110 Jamb Extension	0.00
SC 3	WHT	Full Fiber	0.00

Base Option: 199.12
Line Item Total: 204.50

Buttons: Glass, Grid, Screen, Other, Insert, Change, Delete, Calculate Price, Egress, OK, Cancel

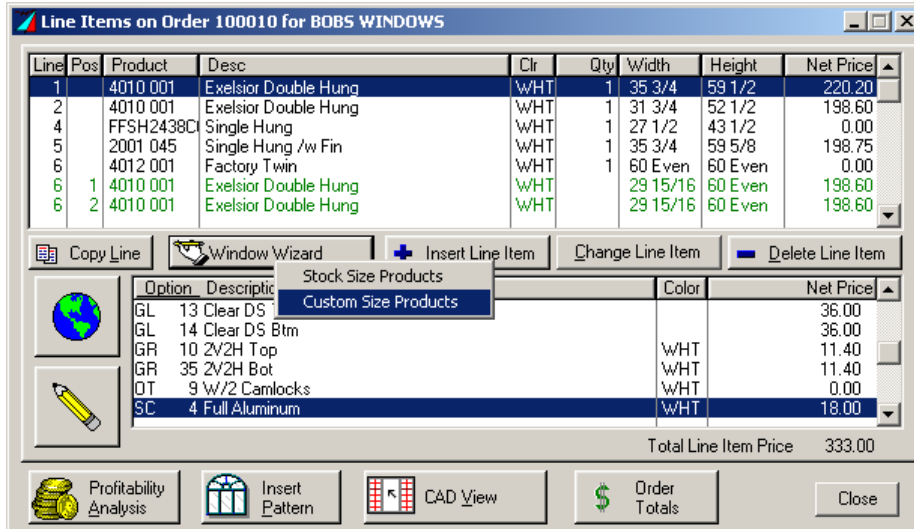
Make **Glass**, **Grid**, **Screen** and **Other** selections.

Click **OK** when finished selecting options for window in position #1.

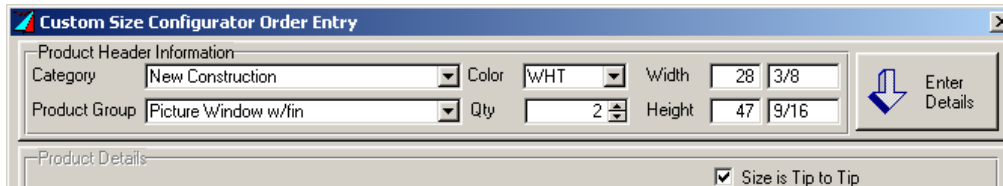
System will repeat sequence for window(s) in following position(s).

Click **OK** when finished selecting options for window(s) in following position(s).

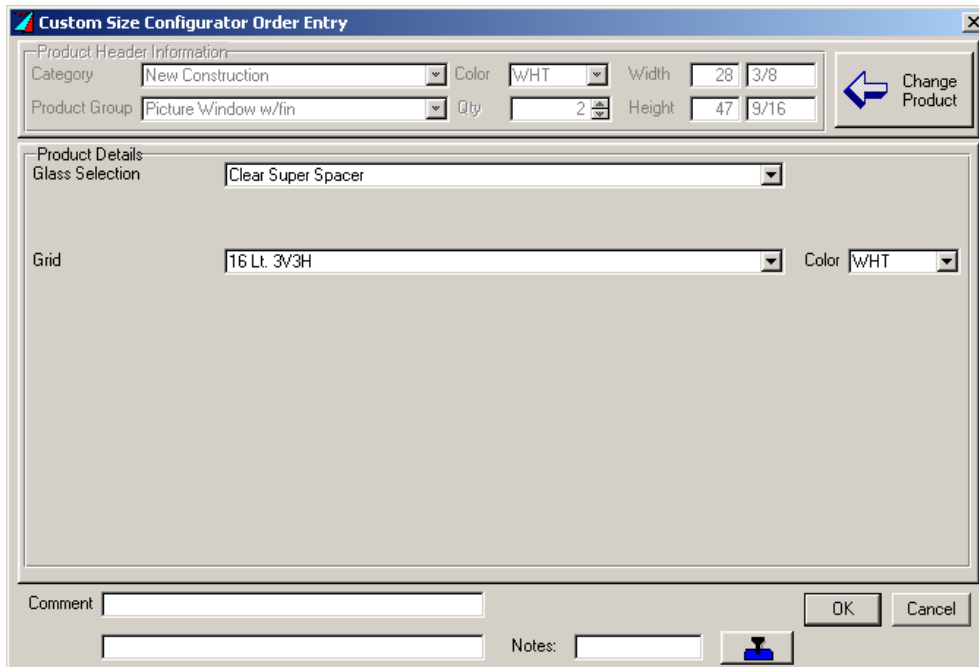
Example 3 – Custom Single Unit using the Window Wizard



Click the **Window Wizard**, then **Custom Size Products** to get started.

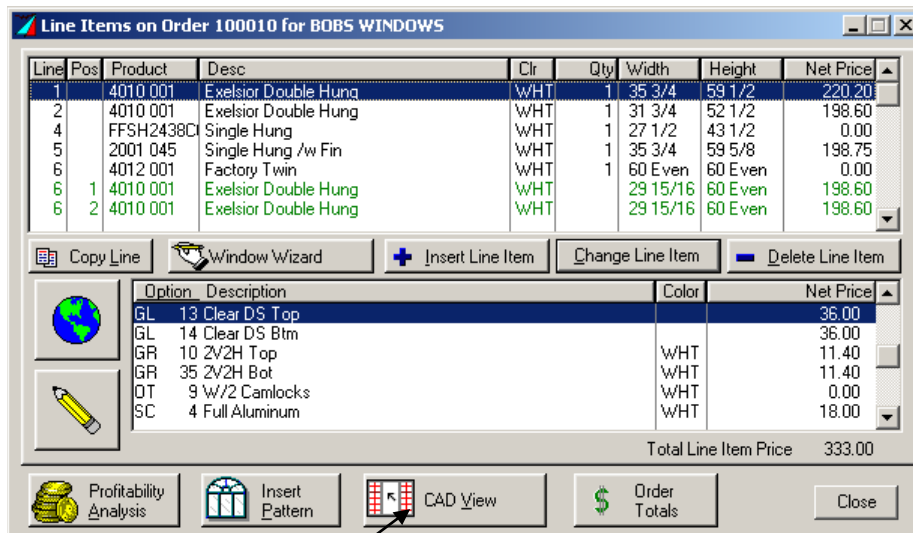


Choose a **Category**, then choices in the **Product Group** are selectable. Pick a **Color**, enter the **Quantity**, **Width**, and **Height**. Click **Enter Details** when finished to continue on to options.



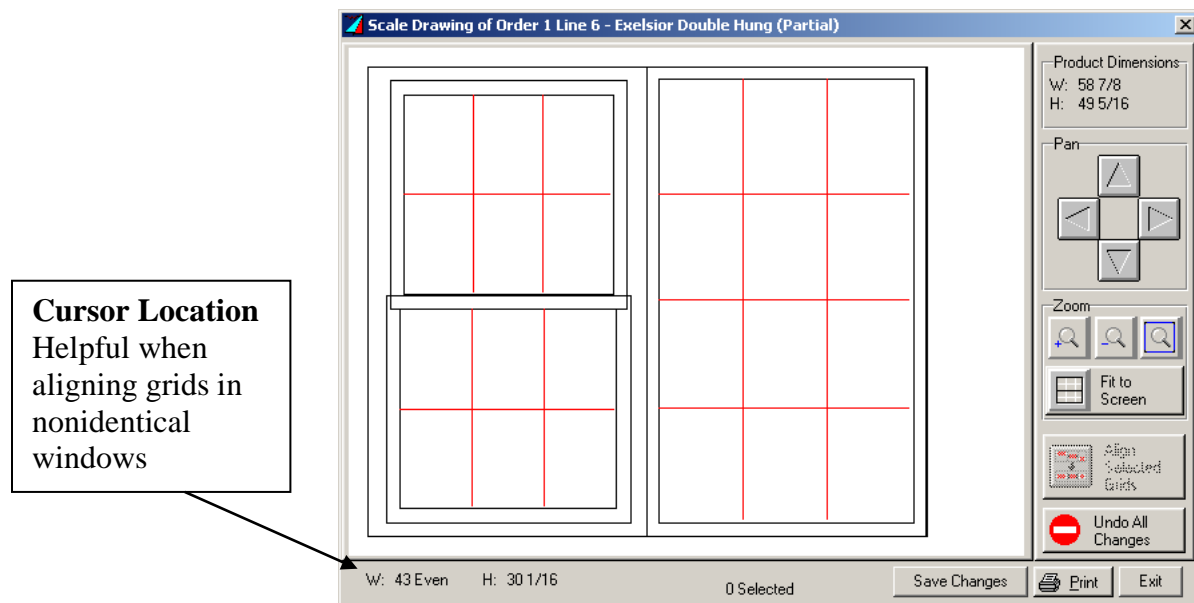
Pick options in the **Product Details**, then click **OK** when finished.

To see a drawing of a window or pattern



Select an individual window or one that is part of a pattern (feature will not work when base of a pattern is selected).

Click **CAD View / Grid Matching**.



Grids (indicated by red lines) can move by dragging them to different positions within the same window and sash.

Click **Print** or **Exit** to return to order line-entry screen.

To Order Stock Windows and Doors

Line	Pos	Product	Desc	Clr	Qty	Width	Height	Net Price
1		4010 001	Exelsior Double Hung	WHT	1	35 3/4	59 1/2	220.20
2		4010 001	Exelsior Double Hung	WHT	1	31 3/4	52 1/2	198.60
4		FFSH2438C	Single Hung	WHT	1	27 1/2	43 1/2	0.00
5		2001 045	Single Hung /w Fin	WHT	1	35 3/4	59 5/8	198.75
6		4012 001	Factory Twin	WHT	1	60 Even	60 Even	0.00
6	1	4010 001	Exelsior Double Hung	WHT		29 15/16	60 Even	198.60
6	2	4010 001	Exelsior Double Hung	WHT		29 15/16	60 Even	198.60

Option	Description	Color	Net Price
GL 13	Clear DS Top		36.00
GL 14	Clear DS Btm		36.00
GR 10	2V2H Top	WHT	11.40
GR 35	2V2H Bot	WHT	11.40
OT	9 W/2 Camlocks	WHT	0.00
SC	4 Full Aluminum	WHT	18.00

Total Line Item Price 333.00

To order standard window and patio door models and sizes, click **Window Wizard**, and then choose **Stock Size Products**.

Product Header Information

Category: **Forefront** Call Size: Qty:

Product Group: Color:

Enter Details

Product Details

Comment:

Notes:

Cancel

Click drop-down buttons to view and select options (refer to catalog for detailed descriptions and illustrations).

Category is the *insert text here*

Product Group is *insert text here*

Call Size is the size using call-outs.

Comment field is for you to add specifics to this particular product that are not shown (comments will appear on confirmations).

Examples of Possible Stock Orders

Example 1 – Stock Single

Example 2 – Stock Patterns

Example 1 – Stock Single (e.g., 3050)

The screenshot shows the 'Stock Configurator Order Entry' window. The 'Product Header Information' section contains the following fields: Category (Forefront), Call Size (3050), Qty (1), Product Group (Single Hung), and Color (WHT). An 'Enter Details' button with a downward arrow icon is located to the right of these fields.

Make selections, then click *Enter Details*.

The screenshot shows the 'Stock Configurator Order Entry' window with the 'Product Details' section expanded. The fields are: Top Glass (Clear Top), Bottom Glass (Clear Bot), Top Grid (6 Lt. 2V1H Top), Bot. Grid Selection (6 Lt. 2V1H Bot.), and Screen (Half Fiber). Each of these fields has a 'Color' dropdown set to 'WHT'. Below these are fields for Exterior Trim, Interior Trims, and Hinging Option, each with a 'Color' dropdown set to 'WHT'. At the bottom, there is a 'Comment' field, a 'Notes' field, and an 'AutoGrid' button with a red arrow pointing to it. There are also 'OK' and 'Cancel' buttons.

Click drop-down buttons to view and select options.

Glass (example shown is Clear SS)

Grid lets you select manually or use **AutoGrid** to select a standard grid.

Choose other options as needed.

Change Product will take you back to the previous screen if you need to change the Category/Product/Size.

Click **OK** when finished.

Example 2 – Stock Patterns

(e.g., left window and right window are different bases, or have different options)

The screenshot shows the 'Stock Configurator Order Entry' window. Under 'Product Header Information', the 'Category' is 'Forefront Twin', 'Call Size' is '3060-2', 'Qty' is '1', 'Product Group' is 'Factory Mullied Twin', and 'Color' is 'WHT'. There is an 'Enter Details' button with a downward arrow icon.

To custom configure multiple-window units, choose a *Category/Product*.

The screenshot shows the 'Stock Configurator Order Entry' window with 'Product Details' expanded. A message states: 'The product that you have requested requires further configuration. The Next Screen will be for Position #1. Press Next to Continue.' Below this is a 'Next' button with a right-pointing arrow. To the left of the message is a diagram with two colored rectangles labeled '1' (red) and '2' (blue). Below the message are dropdown menus for 'Inside Trims' (set to '216 Mullion') and 'Outside Trim' (set to 'Metal Reinforced Mullion'), each with a 'Color' dropdown set to 'WHT'. At the bottom, there are 'Comment' and 'Notes' fields, and a 'Cancel' button.

Make selections, then click *Next* to configure window on left.

The screenshot shows the 'Stock Configurator Order Entry' window with detailed configuration options. Under 'Product Header Information', 'Category' is 'Forefront', 'Product Group' is 'Single Hung Oriel', and 'Call Size' is '3060'. 'Color' is 'WHT' and 'Oriel %' is '66.6600'. There is a 'Change Product' button with a left-pointing arrow. Under 'Product Details', there are dropdown menus for 'Top Glass' (set to 'Top Clear Igu'), 'Bottom Glass' (set to 'Bot Clear Igu'), 'Top Grid' (set to 'TV1H Top'), 'Bot. Grid Selection' (set to 'TV1H Bot'), 'Screen', 'Exterior Trim', 'Interior Trims', and 'Hinging Option'. Each of these dropdowns has a 'Color' dropdown set to 'WHT'. At the bottom, there are 'Comment' and 'Notes' fields, an 'AutoGrid' button with a grid icon, and 'OK' and 'Cancel' buttons.

Make selections, then click *OK*.

Stock Configurator Order Entry

Product Header Information


Category: Forefront Twin Call Size: 3060-2 Qty: 1

Product Group: Factory Milled Twin Color: WHT


Product Details

1	2
---	---

The product that you have requested requires further configuration.
The Next Screen will be
for Position #2
Press Next to Continue



Comment:

Notes: 

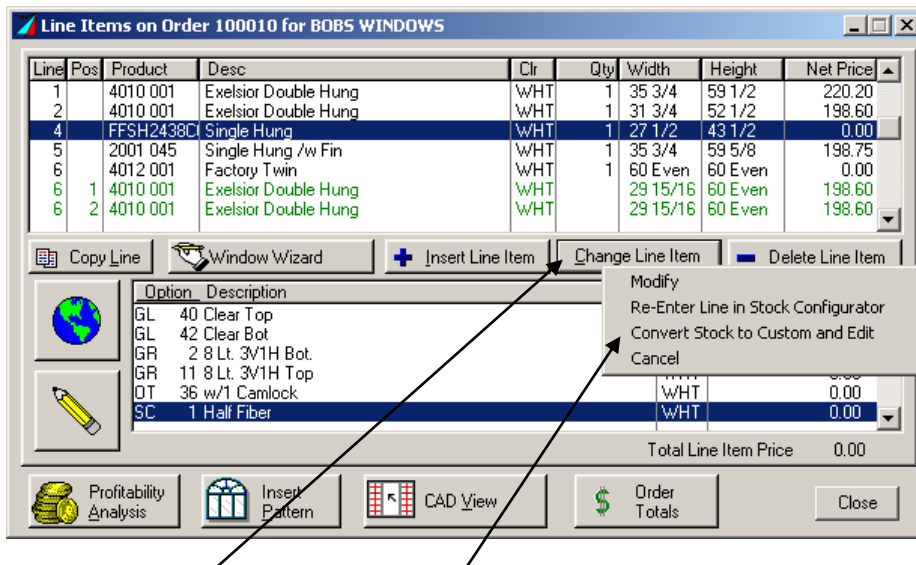
Click *Next* to configure window on right.

The screenshot shows a software window titled "Stock Configurator Order Entry". It is divided into several sections for configuring a window:

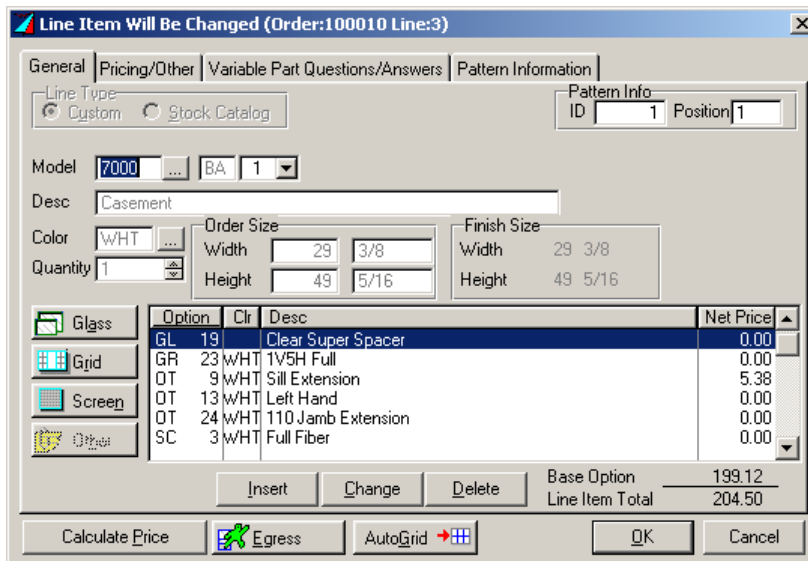
- Product Header Information:** Includes fields for Category (Forefront), Product Group (Single Hung Oriel), Call Size (3060), Color (WHT), and Oriel % (66.6600). A "Change Product" button with a left-pointing arrow is on the right.
- Product Details:** A large section with multiple rows of dropdown menus:
 - Top Glass: Top Clear Igu
 - Bottom Glass: Bot Clear Igu
 - Top Grid: 1V1H Top (Color: WHT)
 - Bot. Grid Selection: 1V1H Bot (Color: WHT)
 - Screen: (Color: WHT)
 - Exterior Trim: (Color: WHT)
 - Interior Trims: (Color: WHT)
 - Hinging Option: (Color: WHT)
- Bottom Section:** Includes a "Comment" field, an "AutoGrid" button with a grid icon, "OK" and "Cancel" buttons, and a "Notes" field with a small icon.

Make selections, then click *OK*.

To Change a Line Item



Click **Change Line Item**, then the type of change to be made.



Other lets you select upgrade and add-on options, which are not glass, grid, or screen.

Tip to Tip Active changes from entering size by opening size to tip to tip.

The Finish Size updates automatically based on model cutbacks.

Egress will determine if the window meets egress regulations.

Auto Grid fills in the predetermined best-fit grid pattern depending on the model and size.

Click **OK** when finished.

Other Features

Category	Amount
Line Items	2,490.50
Misc Parts	0.00
Labor Charges	0.00
Expenses	0.00
Sales Tax	161.88
Less Deposit	0.00
Total Order	2,652.38

Close

Click **Order Totals** to view the total of all charges, then **Close**.

Line	Pos	Product	Desc	Clr	Qty	Width	Height	Net Price
1		4010 001	Exelsior Double Hung	WHT	1	35 3/4	59 1/2	220.20
2		4010 001	Exelsior Double Hung	WHT	1	31 3/4	52 1/2	198.60
4		FFSH2438C	Single Hung	wHT	1	27 1/2	43 1/2	0.00
5		2001 045	Single Hung /w Fin	WHT	1	35 3/4	59 5/8	198.75
6		4012 001	Factory Twin	WHT	1	60 Even	60 Even	0.00
6	1	4010 001	Exelsior Double Hung	WHT		29 15/16	60 Even	198.60
6	2	4010 001	Exelsior Double Hung	WHT		29 15/16	60 Even	198.60

Option	Description	Stock Size Products	Color	Net Price
GL	40 Clear Top	Custom Size Products		0.00
GL	42 Clear Bot			0.00
GR	2 8 Lt. 3V1H Bot		WHT	0.00
GR	11 8 Lt. 3V1H Top		WHT	0.00
OT	36 w/1 Camlock		WHT	0.00
SC	1 Half Fiber		WHT	0.00

Total Line Item Price 0.00

Close

Window Wizard (with options for **Stock Size Products** and **Custom Size Products**).

To duplicate a line item with or without revisions, highlight line and click **Copy Line**.

To change a line item (e.g., from custom-to-stock or stock-to-custom, size, options, etc.) click **Change Line Item**.

Delete Line Item erases the highlighted line.

Continue with order; when complete, **click Close**.

Line Items on Order 100010 for BOBS WINDOWS

Line	Pos	Product	Desc	Clr	Qty	Width	Height	Net Price
1		4010 001	Exelsior Double Hung	WHT	1	35 3/4	59 1/2	220.20
2		4010 001	Exelsior Double Hung	WHT	1	31 3/4	52 1/2	198.60
4		FFSH2438C	Single Hung	WHT	1	27 1/2	43 1/2	0.00
5		2001 045	Single Hung /w Fin	WHT	1	35 3/4	59 5/8	198.75
6		4012 001	Factory Twin	WHT	1	60 Even	60 Even	0.00
6	1	4010 001	Exelsior Double Hung	WHT		29 15/16	60 Even	198.60
6	2	4010 001	Exelsior Double Hung	WHT		29 15/16	60 Even	198.60

Option	Description	Color	Net Price
GL	40 Clear Top		0.00
GL	42 Clear Bot		0.00
	Global Color Change	WHT	0.00
	Global Pricing Options	WHT	0.00
	Global Option Substitution	WHT	0.00
		WHT	0.00

Total Line Item Price 0.00

Global Color Change changes the entire order to a color that you specify.

Global Pricing recalculates pricing for the entire order and optionally verifies size and side dependent options.

Global Option Substitution changes the entire order for a particular option (e.g., change all glass from clear to Low-E).

Pencil Icon allows you to enter comments that will appear on the confirmation.

Profitability Analysis shows the cost, sell, and profit of each line item and the total order.

Profitability Analysis for Order 1

Line Item Details

Line	Type	Description	Clr	\$ Cost	\$ Sell	\$ Profit	% Profit
1	BA	Double Hung	WHT	146.80	205.52	58.72	40.00
	GL	Clear DS Top		24.00	31.20	7.20	30.00
	GL	Clear DS Btm		24.00	31.20	7.20	30.00
	GR	2V2H Top	WHT	7.60	9.88	2.28	30.00
	GR	2V2H Bot	WHT	7.60	9.88	2.28	30.00
	QT	W/2 Camlocks	WHT				100.00
2	BA	Single Slider	WHT				100.00
	GL	Low E DS Fixed					100.00
	GL	Low E DS Operable					100.00
	SC	Half Glass	WHT				100.00

Summary by Line Type

Line Type	\$ Cost	\$ Sell	\$ Profit	% Profit
Base	1,045.40	1,463.56	418.16	40.00
Glass	94.20	122.46	28.26	30.00
Grid	24.80	32.24	7.44	30.00
Other	17.58	24.62	7.04	40.05
Screen	31.00	40.30	9.30	30.00

Invoice Totals

Materials	1,683.18
Labor Charges	0.00
Dir Chg/Exp	0.00
Sales Tax	0.00
Less Deposit	0.00
Invoice Net Due	\$1,683.18

Product Profitability Totals

Line Items	1,683.18
Dir Chgs	0.00
Misc Parts	0.00
Sub Total	1,683.18
- Dir Cost	0.00
- Mat Cost	1,212.98
Profit / Loss	\$470.20

Print Report Close

Click **Print Report** to get a printed copy of the profitability analysis.

To Change a Quote or Order

Quotes/Orders for BOBS WINDOWS

Enter/Edit Quotes | Orders Currently In Factory | Shipping Forecast | Maintenance

Quotes By Order Number | Quotes By Customer Name | Quotes By Purchase Order | Submitted Quotes (Pending Confirmation)

Order #	Customer Name	Purchase Order	Quantity				Factory Order #	Date Entered
			Misc	Reg	Par	Stk		
100,001	John Smith		<input type="checkbox"/>	20	0	0	0	2/22/2006
100,003	Carl Spencer		<input type="checkbox"/>	20	0	0	0	2/22/2006
100,004	John Smith		<input type="checkbox"/>	20	0	0	0	2/22/2006
100,005	Custom Homes of Peoria		<input type="checkbox"/>	20	0	0	0	2/22/2006
100,010	Steve Gruber		<input checked="" type="checkbox"/>	7	0	0	0	3/09/2006
100,012	Bill Martin		<input type="checkbox"/>	1	0	0	0	3/16/2006

Copy Highlighted Order to New Order | Submit Order to Factory | Insert New Order | Change Order | Delete Order

Order Line Items | Print Order Confirmation(s) | Display Order Total | Exit

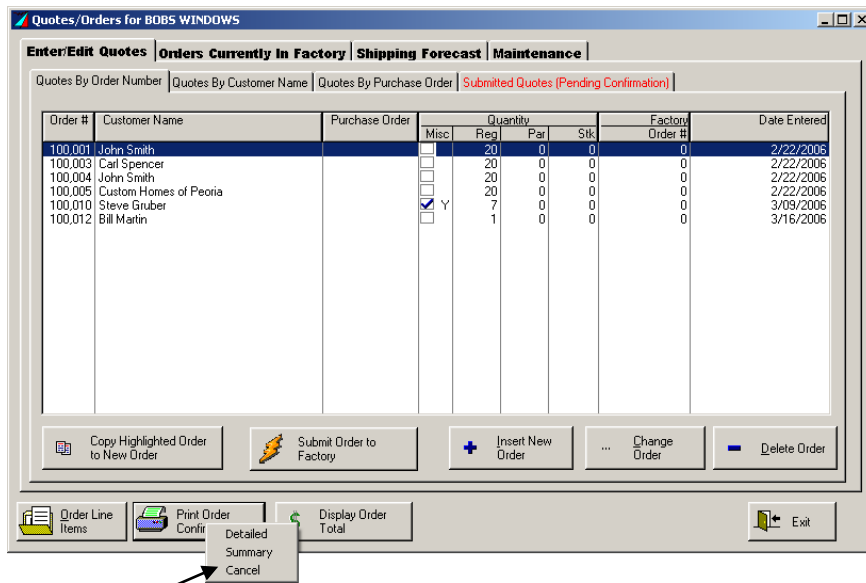
Point and click to highlight the order to be changed.

Click **Change Order** if changes will be made to the customer information (header) screen.

Click **Order Line Items** if changes will be made only to line items.

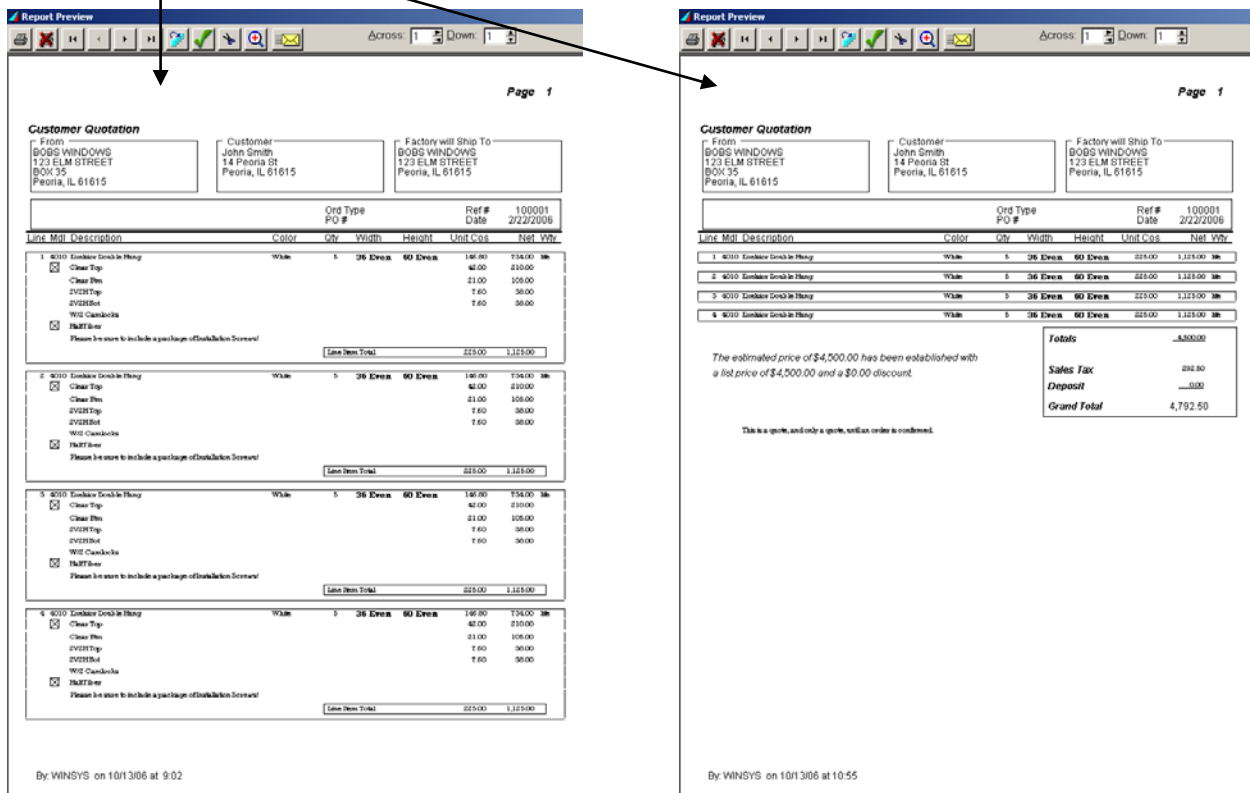
If you change your mind and want to go back to the original order, just click **Cancel** or **Close**.
Clicking **OK** will save the changes.

Printing Quotations to Your Customer



To print a confirmation, click on order, then click **Print Order Confirmation(s)**.

Choose **Detailed** or **Summary**. The confirmation will appear on the screen.



If the confirmation appears satisfactory and complete, print and send to your customer for approval.

Printing Toolbar

The toolbar at the top of the screen controls printing functions for confirmations and other reports in Winsys LiteEye.



Print the report (not all printers supported) Exit without printing

Go to the first page Go to the previous page

Go to the next page Go to the last page

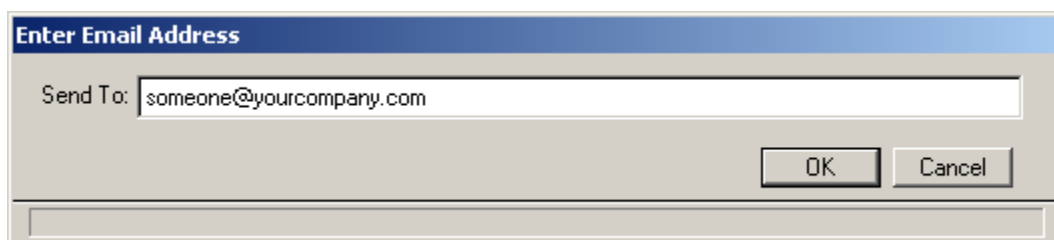
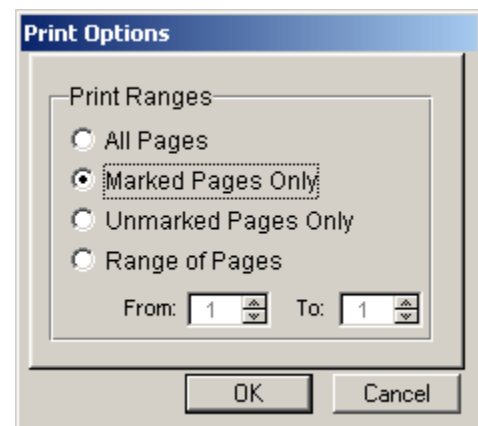
Jump to the specified page

Mark the page Unmark the page
All marked or unmarked pages can be printed.

Delete the page from the report. Deleted pages are restored when the report is run again.

Zoom

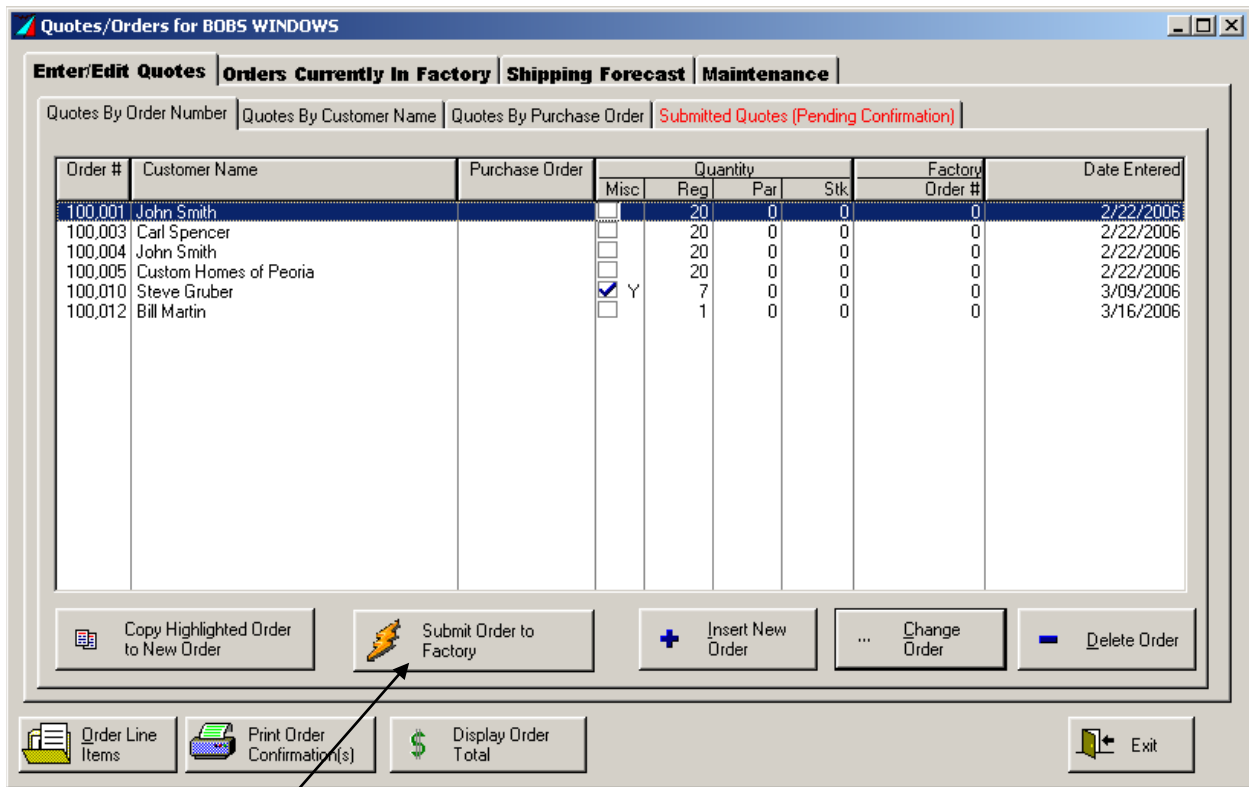
Email Adobe Acrobat .pdf file. Enter the recipients email address, then click OK to immediately send a message with the report attached as a .pdf file.



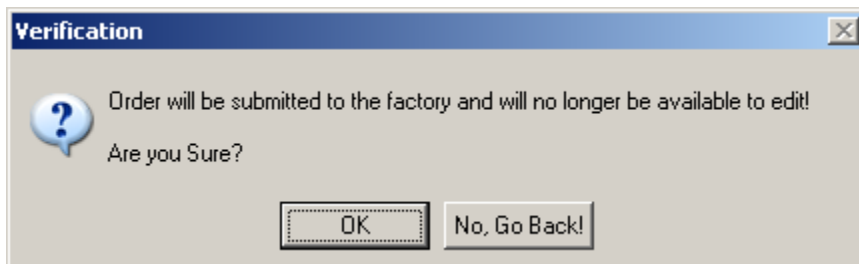
The message will be from winsysliteeye@winsys32.com. If a spam/ junk mail filter is in use, add this email address to allowed senders and make sure attachments are also allowed.

Across: 1 Down: 1 Controls the number number of pages displayed on the screen.

Submitting Orders to the Factory



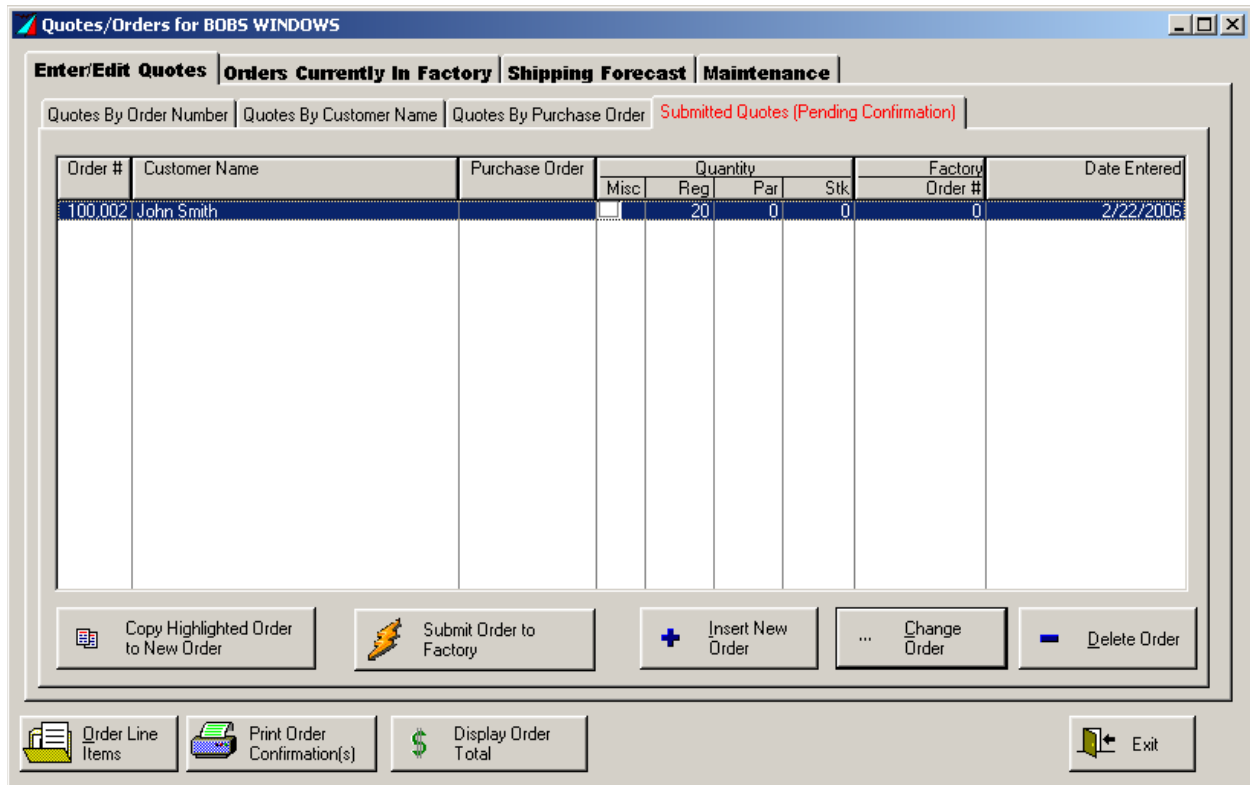
Click **Submit Order to Factory**. A verification prompt appears.



Click **OK** to send the order.

Viewing Submitted Orders

The order is removed from the current list and can be found under the Submitted Quotes (Pending Confirmation). The factory receives an email notification and will send back a confirmation within 24 hours.

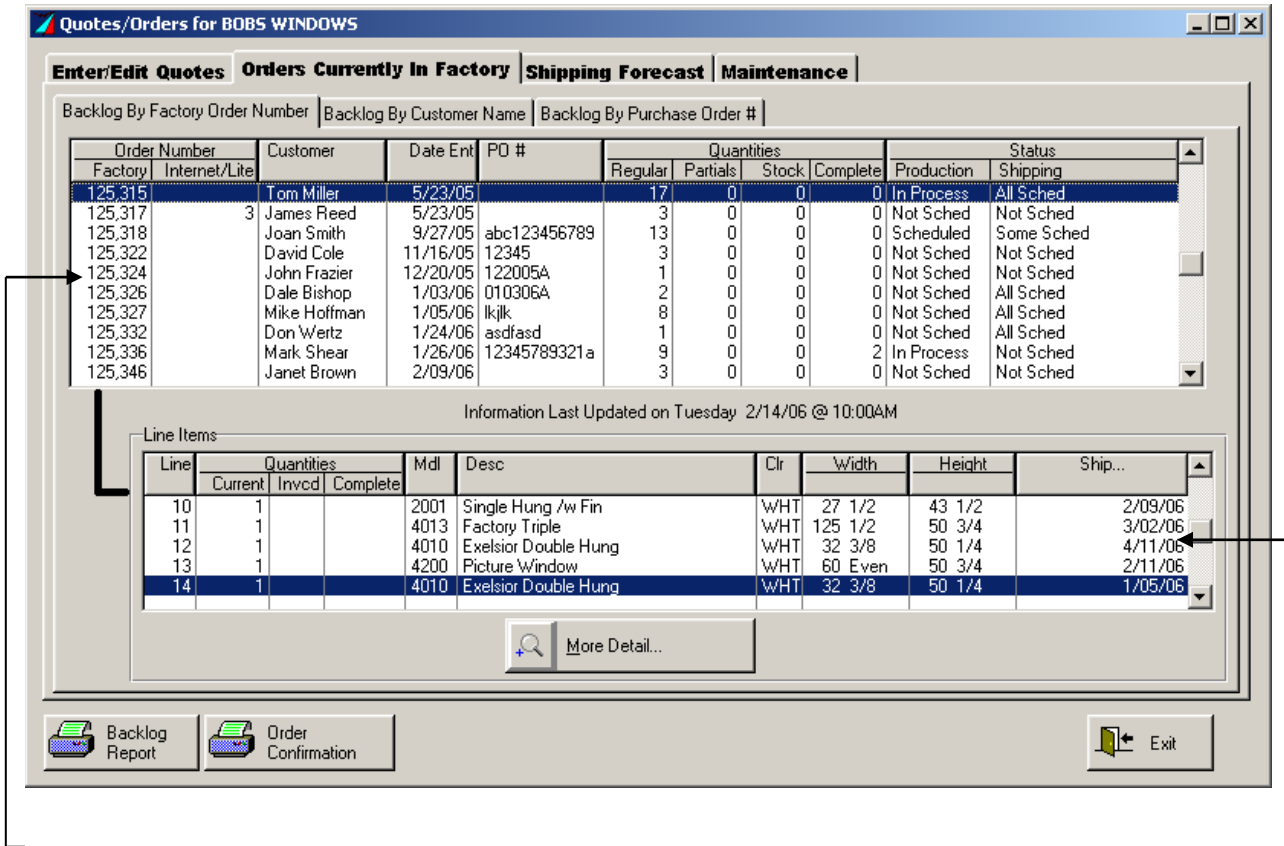


The order information can be viewed, but not edited, using the **Change Order** and **Order Line Items** buttons.

Delete Order only clears the order from the Submitted Quotes (Pending Confirmation) list. Once the order was submitted, the factory was sent notification. You will have to contact customer service to cancel an order sent in error.

Orders Currently in Factory

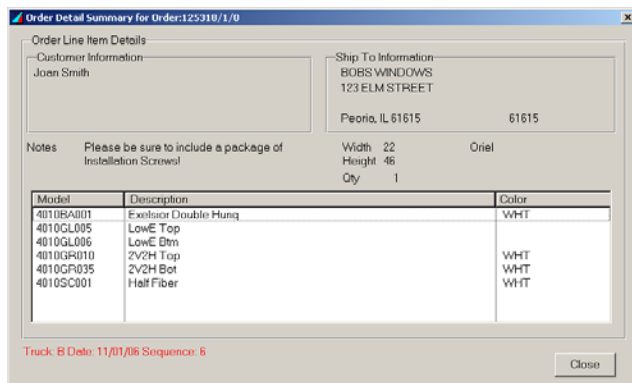
The Orders Currently in Factory tab is used to check the production and shipping status of orders. It shows all of your companies orders, not just those entered through *Winsys Lite Eye*. After an order is submitted through *Winsys Lite Eye*, it will not show up here until the factory imports it.



All of your company's orders are listed in the backlog. The factory assigns the Factory Order Number. If the order was submitted through *Winsys Lite/Lite Eye*, that order number is also displayed, but they also receive a Factory Order Number. This will appear on your confirmation.

Each line item of the order is listed when you highlight an order.

Click the **More Detail** button view the order shipping information and options for that line item.



Backlog By Factory Order Number | Backlog By Customer Name | Backlog By Purchase Order #

Use the tabs to sort the backlog, as specified.

The screenshot shows a dropdown menu for 'Status' with two columns: 'Production' and 'Shipping'. The 'Production' column has options: 'In Process', 'Not Sched', 'Scheduled', 'Not Sched', 'Not Sched', 'Not Sched', 'Not Sched', 'Not Sched', 'In Process', 'Not Sched'. The 'Shipping' column has options: 'All Sched', 'Not Sched', 'Some Sched', 'Not Sched', 'Not Sched', 'All Sched', 'All Sched', 'All Sched', 'Not Sched', 'Not Sched'. Below the menu is a table with columns 'Qty', 'Height', and 'Ship...'. The table contains several rows of data, with the last row highlighted in blue.

Qty	Height	Ship...
7/8	50 1/4	2/02/06
ven	50 3/4	9/04/06
7/8	50 1/4	7/01/06
7/2	50 3/4	
7/8	50 1/4	

Production Status can be Not Scheduled, Scheduled, or In Process.

Shipping Status can be Not Scheduled, Some Scheduled, or All Scheduled.

If a line item is scheduled for shipment, the shipping date is displayed next to it.

Two buttons are shown: 'Backlog Report' with a printer icon and 'Order Confirmation' with a printer icon.

Click **Backlog Report**, then **Summary** or **Detailed** to view the report on screen.

The screenshot shows a 'Summary' backlog report for BOBS WINDOWS. The table has columns: Order #, Customer, Purchase Order, Order Date, Age, Qty, Ship, Par, Qty, Total. The data is summarized by order number and customer name.

Order #	Customer	Purchase Order	Order Date	Age	Qty	Ship	Par	Qty	Total
94360	BOBS WINDOWS	1047	4/18/2005	878	0	0	0	0	0
94371	BOBS WINDOWS	1047	4/17/2005	879	0	0	0	0	0
94381	BOBS WINDOWS	1047	4/04/2005	891	1	0	0	1	1
94391	BOBS WINDOWS	1047	4/07/2005	888	0	1	0	1	1
94401	BOBS WINDOWS	1047	3/29/2005	902	0	0	0	0	0
94411	BOBS WINDOWS	1047	4/11/2005	890	0	0	0	0	0
94421	BOBS WINDOWS	1047	3/29/2005	902	1	0	0	1	1
94431	BOBS WINDOWS	1047	3/14/2005	907	0	0	0	0	0
94441	BOBS WINDOWS	1047	4/07/2005	888	2	0	0	2	2
94451	BOBS WINDOWS	1047	3/19/2005	904	0	0	0	0	0
94461	BOBS WINDOWS	1047	4/03/2005	890	1	0	0	1	1
94471	BOBS WINDOWS	1047	4/03/2005	890	0	0	0	0	0
94481	BOBS WINDOWS	1047	4/19/2005	876	1	0	0	1	1
94491	BOBS WINDOWS	1047	4/19/2005	876	0	0	0	0	0
94501	BOBS WINDOWS	1047	4/19/2005	876	11	0	0	11	11
94511	BOBS WINDOWS	1047	3/29/2005	902	0	0	0	0	0
94521	BOBS WINDOWS	1047	4/07/2005	888	1	0	0	1	1
94531	BOBS WINDOWS	1047	4/07/2005	888	1	1	0	2	2
94541	BOBS WINDOWS	1047	4/04/2005	891	0	1	0	1	1
94551	BOBS WINDOWS	1047	4/17/2005	879	2	0	0	2	2
94561	BOBS WINDOWS	1047	3/29/2005	902	1	0	0	1	1
94571	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94581	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94591	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94601	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94611	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94621	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94631	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94641	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94651	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94661	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94671	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94681	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94691	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94701	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94711	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94721	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94731	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94741	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94751	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94761	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94771	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94781	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94791	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94801	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0

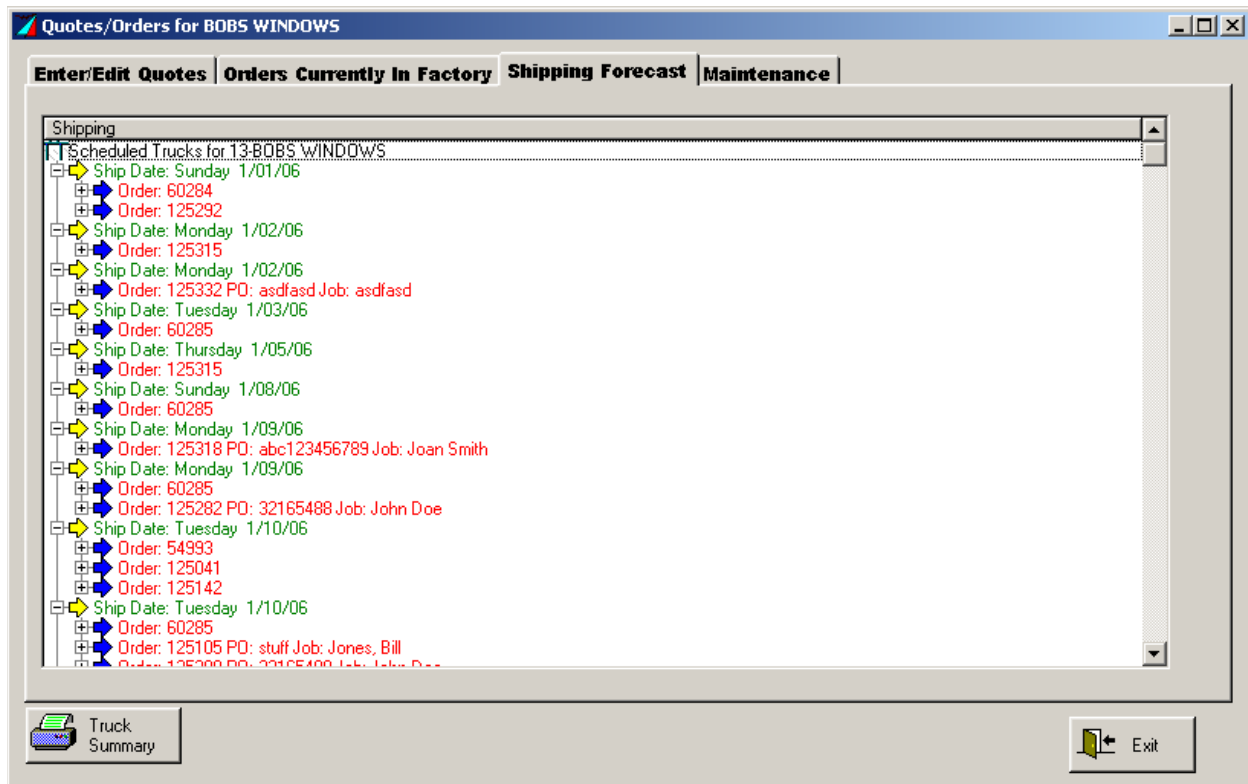
The screenshot shows a 'Detailed' backlog report for BOBS WINDOWS. The table has columns: Order #, Customer, Purchase Order, Order Date, Age, Qty, Ship, Par, Qty, Total. The data is detailed, showing individual line items for each order.

Order #	Customer	Purchase Order	Order Date	Age	Qty	Ship	Par	Qty	Total
94360	BOBS WINDOWS	1047	4/18/2005	878	0	0	0	0	0
94371	BOBS WINDOWS	1047	4/17/2005	879	0	0	0	0	0
94381	BOBS WINDOWS	1047	4/04/2005	891	1	0	0	1	1
94391	BOBS WINDOWS	1047	4/07/2005	888	0	1	0	1	1
94401	BOBS WINDOWS	1047	3/29/2005	902	0	0	0	0	0
94411	BOBS WINDOWS	1047	4/11/2005	890	0	0	0	0	0
94421	BOBS WINDOWS	1047	3/29/2005	902	1	0	0	1	1
94431	BOBS WINDOWS	1047	3/14/2005	907	0	0	0	0	0
94441	BOBS WINDOWS	1047	4/07/2005	888	2	0	0	2	2
94451	BOBS WINDOWS	1047	3/19/2005	904	0	0	0	0	0
94461	BOBS WINDOWS	1047	4/03/2005	890	1	0	0	1	1
94471	BOBS WINDOWS	1047	4/03/2005	890	0	0	0	0	0
94481	BOBS WINDOWS	1047	4/19/2005	876	1	0	0	1	1
94491	BOBS WINDOWS	1047	4/19/2005	876	0	0	0	0	0
94501	BOBS WINDOWS	1047	4/19/2005	876	11	0	0	11	11
94511	BOBS WINDOWS	1047	3/29/2005	902	0	0	0	0	0
94521	BOBS WINDOWS	1047	4/07/2005	888	2	0	0	2	2
94531	BOBS WINDOWS	1047	3/19/2005	904	0	0	0	0	0
94541	BOBS WINDOWS	1047	4/03/2005	890	1	0	0	1	1
94551	BOBS WINDOWS	1047	4/17/2005	879	2	0	0	2	2
94561	BOBS WINDOWS	1047	3/29/2005	902	1	0	0	1	1
94571	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94581	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94591	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94601	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94611	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94621	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94631	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94641	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94651	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94661	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94671	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94681	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94691	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94701	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94711	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94721	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94731	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94741	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94751	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94761	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94771	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94781	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94791	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0
94801	BOBS WINDOWS	1047	4/07/2005	888	0	0	0	0	0

Order Confirmation will print the order confirmation the factory sends.

Shipping Forecast

The Shipping Forecast tab provides an easy method to see what items are shipping on a specified day. The list is sorted chronologically, then by order number.



Select a date or order, then click the **Truck Summary** button for a report of the orders and number of items in the shipment for that day.

10/19/2006 - Shipping Summary for Truck ID 11006 Page 6

Order	PO #	Dealer's Customer PO	Reps	Stock	Padst	Total
125,222		united and aluminum	2	1	3	
125,222			4	7	2	13
125,292			6			6
125,292			11			11
125,291			25	5	2	32
125,292			26	1		26
125,281			7	2	9	
125,244			7	2	9	
125,269	3802155	John Smith	9			9
125,269		Multi-Track Lino Room	10			10

Delivery To: 122Pearlree
Your Town, IL 12345

Order	PO #	Dealer's Customer PO	Reps	Stock	Padst	Total
125,268	12345	John Smith	13			13
125,267	123456	John Alford	0			0
125,269	123456	Terry Smith	8			8

Delivery To: 1955 Edwards
Your Town, IL 12345

Order	PO #	Dealer's Customer PO	Reps	Stock	Padst	Total
125,272	8854	Connie	11	2	1	14
125,273	8854	Connie	12	2	1	15

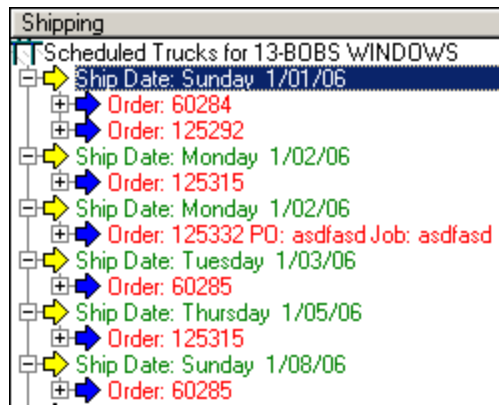
Delivery To: 122Pearlree
Your Town, IL 12345

Order	PO #	Dealer's Customer PO	Reps	Stock	Padst	Total
124,279	32145439	John Doe	10			10

Total Units: 1,587

THANK YOU...we appreciate your business
Wiley's Technical Support Phone: 800-949-0151
4627 N. Oakley, Ste. 205 Peoria, IL 61615 Fax: 309-691-0215

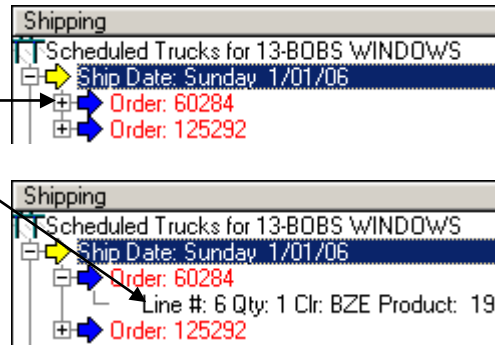
Wileys Technical Support/Peoria, IL 61615-8006/MS/VS-1



Partially shipped orders will have more than one shipping date.

Click the + next to an order to expand it and view the items in the order.

Click the line item to view item details and options.



Order Detail Summary for Order:60284/6/1

Order Line Item Details

Customer Information

Ship To Information
BOBS WINDOWS
123 Elm Street
KATY, IL 99999 99999

Notes

Width 19 Even Oriel
Height 49 Even
Qty 1

Model	Description	Color
7000BA001	Casement New Consturction	BZE
7000GL007	Clear	
7000OT013	Left Hand	BZE

Truck: C Date: 1/01/06 Sequence: 12

Close

Edits

Below are changes that should be made to customize the document for your dealers. Any other text and graphics can be changed/added. You may want to change all of the screenshots in order entry to show your products and options, add more to patterns, etc.

Page 1

Add your company's logo or name to title page. Other suggested titles are Training Manual, Users Guide, Reference.

Page 2

Help desk information at the bottom of the table of contents.

Page 3

You may want to put each dealer's logon settings on this page.

Page 4

Change introductory screenshot so it will show your company's name.

Page 5

Change first screenshot so it will show your company's name.

Page 16

Edit information about changing the date requested and rush order policy.

Page 17

Delete UOM section if not applicable.

Delete entire materials section if dealers aren't allowed to order raw materials.

Page 18

Edit Window Wizard text for Example 3 based on your settings (default is Configurator). You will want to remove this section if not using the configurator.

Page 20

Edit Other options text based on your options.

Page 22

Delete pages 22 – 23 if you don't offer custom windows through the configurator.

Change Window Wizard text (title and under first picture) to match page 16.

Change screenshots two and three to designate your products.

The text under the second picture needs to match the screenshot description.

Page 23

Delete page if CAD feature is not enabled.

Page 24

Change both screenshots to show your products.

Add Category and Product Group descriptions.

Delete pages 24 – 27 if not using the stock configurator.

Page 25

Delete AutoGrid text if not enabled and change screenshot.

Page 28

Replace second screenshot if "Replace Highlighted Option" button is used.

Delete Tip to Tip Active, Egress, and/or Auto Grid sections if they are not offered.

Page 29

Change second screenshot if not using the configurator.

Change Window Wizard text (title and under second picture) to match page 18.

Page 30

Delete Global Option Substitution if not available.

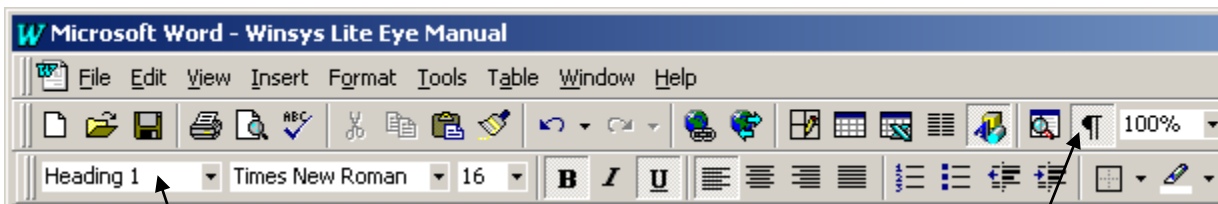
Page 35

Procedure for canceling an order sent in error.

Page 36, 38, and 39

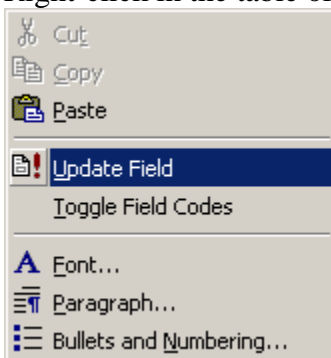
Change screen shots to show your customer and product information.

The table of contents can be automatically updated after changes are made. Manual changes can still be made too.



Use **Heading Styles** to generate entries for the table of contents.

Right-click in the table of contents.



Choose **Update Field**.

Use the **Show/Hide ¶** feature to view page breaks, formatting, etc.



Select **Update entire table** and click **OK**.