

Windowmaker Presentation

Windowmaker.com



Agenda





WINDOWMAKER[®] SOFTWARE

Our Philosophy

We are trusted collaborators; we work hand in hand to achieve shared success. With decades of global experience, we bring invaluable insights to guide businesses, delivering comprehensive end-to-end sales and manufacturing software solutions. For over 40 years, we've been at the forefront, supporting clients with enterprise-level requirements worldwide.

Our Vision

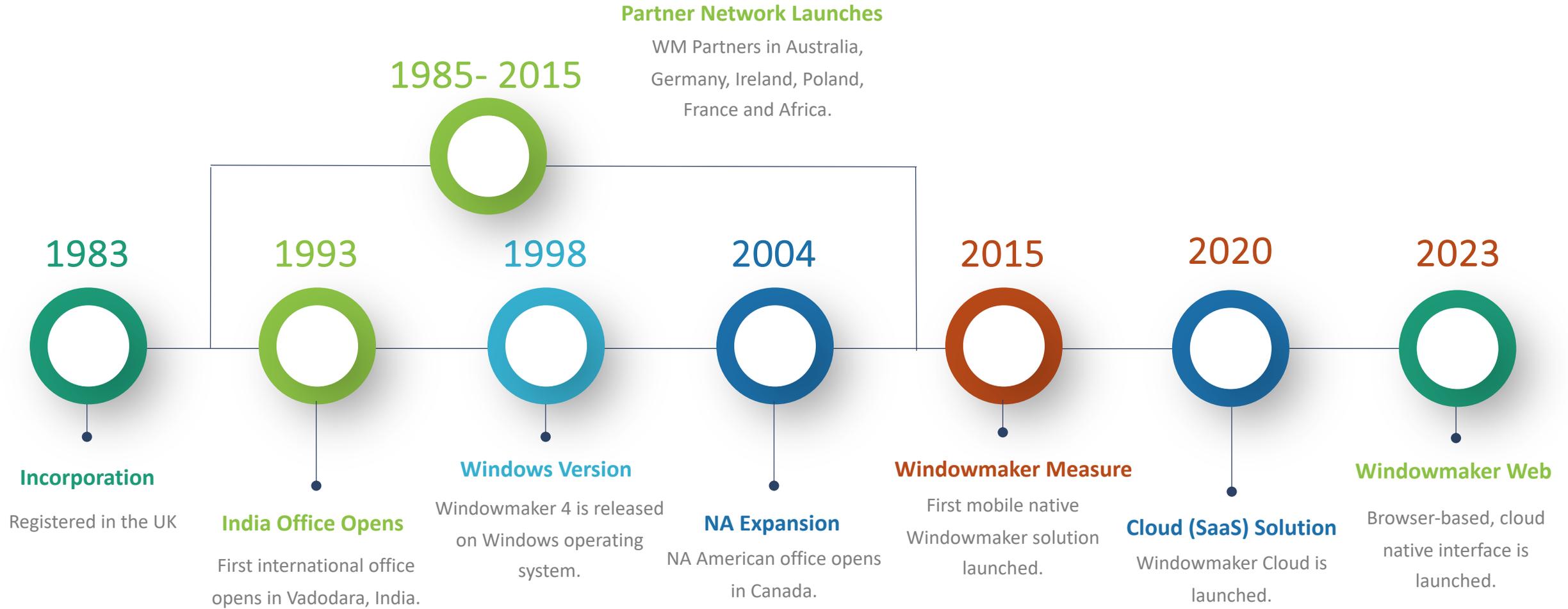
To become the digital life-blood of the window and door industry.



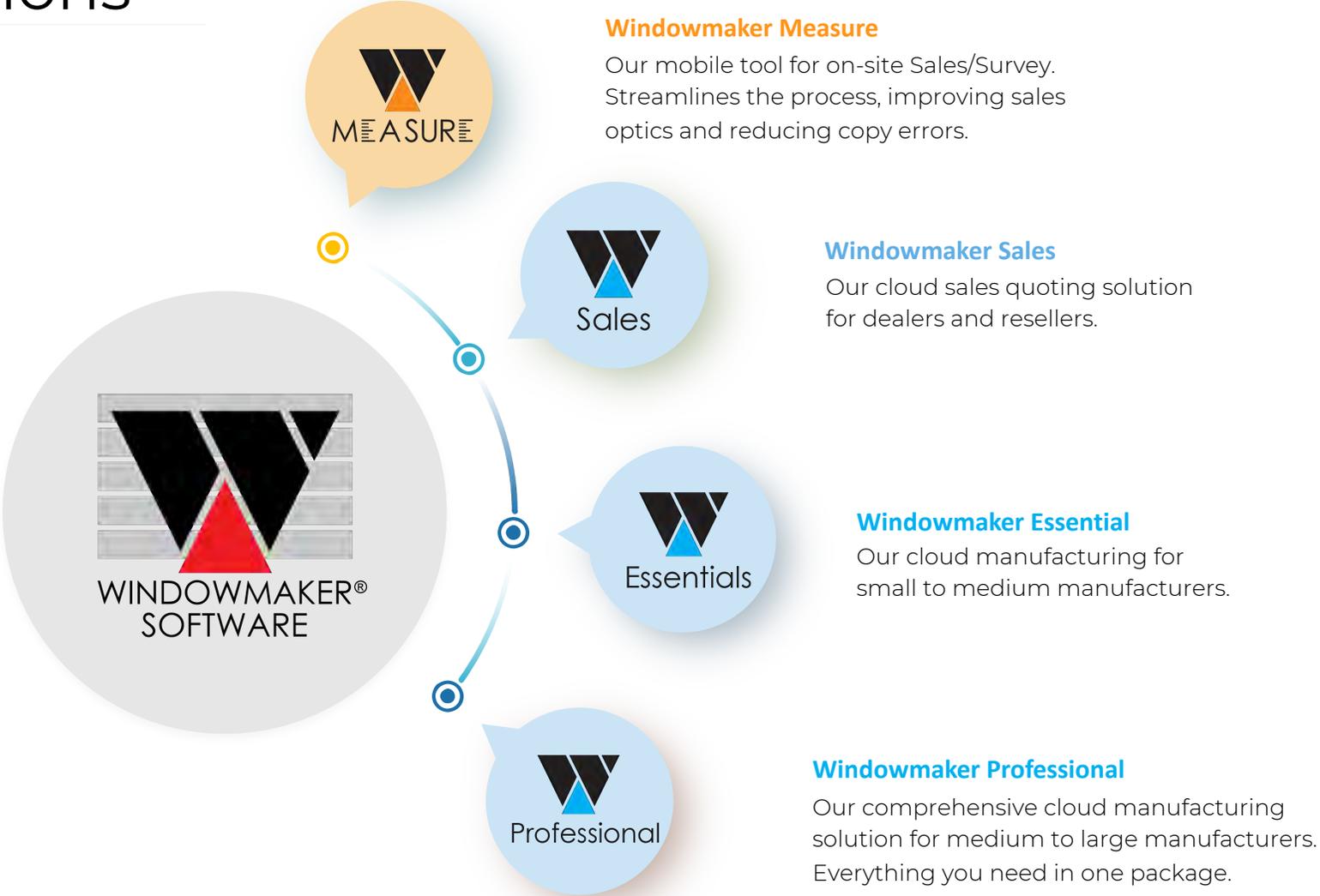
The World's Leading Software for the
Window and Door Industry



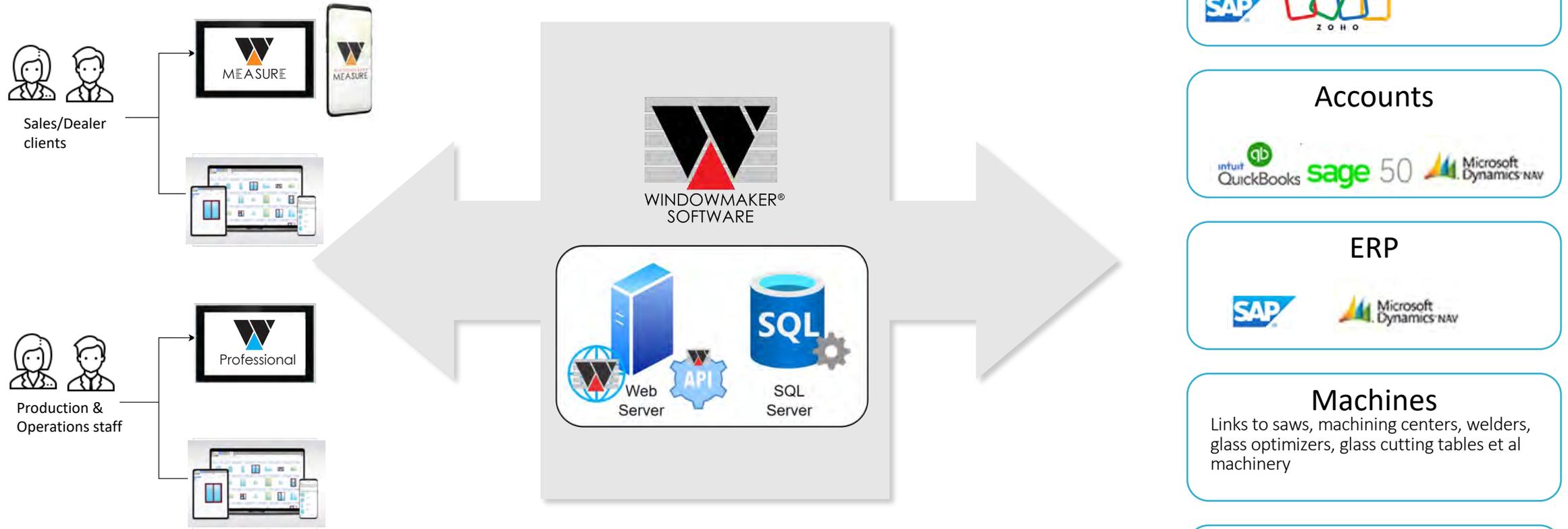
Our Timeline



Our Solutions



Windowmaker High Level Architecture



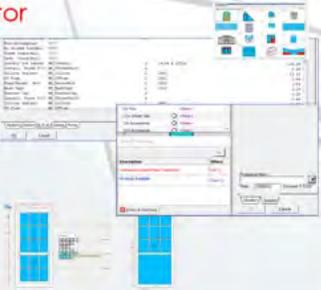
Windowmaker High Level Architecture



The Configurator

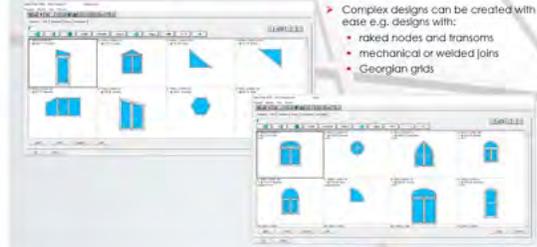
The Configurator

- Unique **Rules** based software to generate:
 - Bill of Materials (BOM), Labour, Machining, Pricing
 - Sub-batch sort key
 - Graphics (**Vector & Bitmap**)
- Rules-based **Disallows, Errors, Warnings**.
- **Alignment** between Transoms, Grid bars, Rake nodes, Construction Lines.
- Inbuilt **Windload & U-value** calculations.



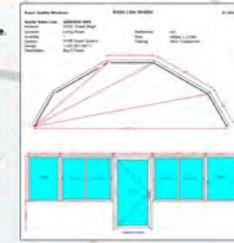
Angled & Arched Shapes

- Complex designs can be created with ease e.g. designs with:
 - raked nodes and transoms
 - mechanical or welded joints
 - Georgian grids



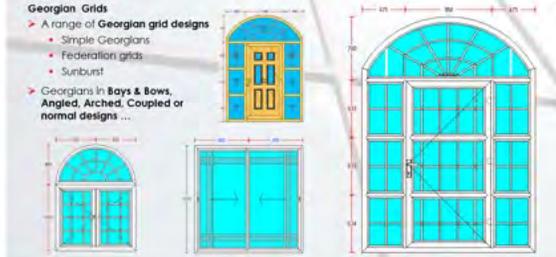
Bays, Bows & Shopfronts

- Enter up to **12 facets**.
- Input Bay & Bow details **surveyed from inside or outside**.
- Select whether you will **input projection dimensions or angles**.
- Handle **symmetric or asymmetric** designs.
- Apply a bay angle greater than 180°.
- Choose from **multiple views** plan, elevation or both.
- **Set height above floor** for different facets of bay windows.
- Select **pre-defined shapes** or create your own.
- Generate **each facet Production Report** based on CIL cutting angles & lengths and Angles and adjustments for bay poles & couplers.



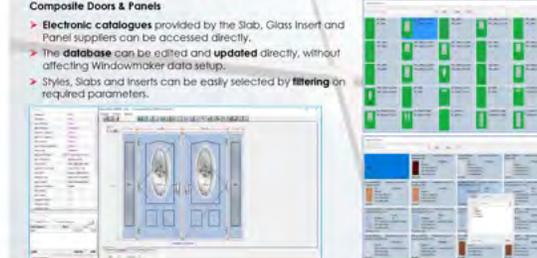
Georgian Grids

- Georgian Grids**
- A range of **Georgian grid designs**
 - Simple Georgians
 - Federation grids
 - Sunburst
 - Georgians in **Bays & Bows, Angled, Arched, Coupled or normal designs** ...



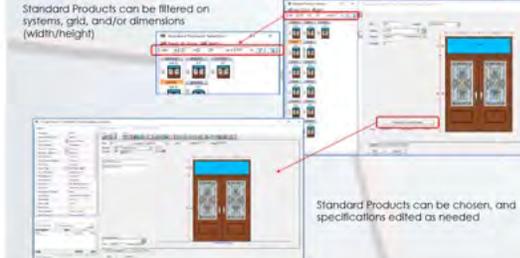
Entrance Doors

- Composite Doors & Panels**
- **Electronic catalogues** provided by the Slab, Glass Insert and Panel suppliers can be accessed directly.
 - The **database** can be edited and **updated** directly, without affecting Windowmaker data setup.
 - Styles, Slabs and Inserts can be easily selected by **filtering** on required parameters.



Standard Products

- Standard Products can be filtered on systems, grid, and/or dimensions (width/height)



Standard Products can be chosen, and specifications edited as needed.

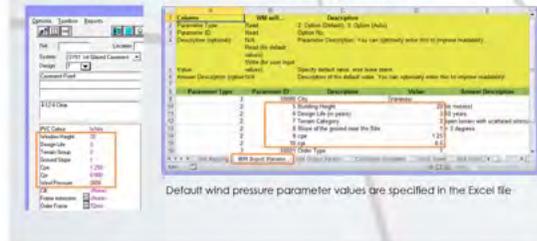
Big Designs (Curtain Wall)

- You can create items:
 - of **up to 65m w x 65m h**
 - with a grid size of up to **50 wide x 50 high**
- You can:
 - produce them **individually** or **split into ladders**
 - **alter the ladder layout** (Horizontals and Verticals and their positions)
 - generate **Ladder Document** containing detailed product specifications and dimensioned graphics



Excel Based Rules

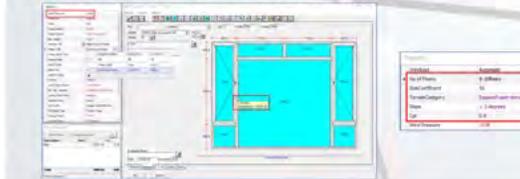
You can use MS Excel to simplify calculations of complex designs, and import them into Windowmaker.



Default wind pressure parameter values are specified in the Excel file

Windload

- Evaluate **Wind Pressure** for the Item.
- Test **Frame Extensions, Couplers and Frame Transoms / Mullions** for the required rigidity (E_w).
- **Filter out profiles** below the required rigidity.
- **Filter out glass** that won't be able to withstand the Wind Pressure.
- Ensure appropriate profiles and glass are used, during Order Entry.
- You can input either the wind pressure or the relevant parameters.



Sales & Survey

Sales

Windowmaker has the flexibility and features you need for effective sales (direct and through dealers) as well as for surveying.

- Online and Offline solutions.
- Automatic synchronisation of data online.
- Efficient solutions for Dealers.
- Mobile app Windowmaker Measure for fast and accurate surveying.

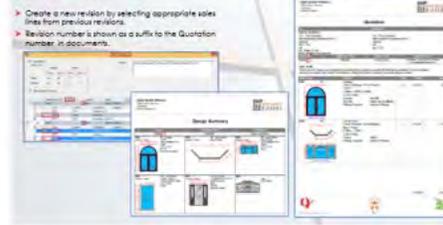


Impressive Customer Documents



Revisions

- Create a new revision by selecting appropriate sales lines from previous revisions.
- Revision number is shown as a suffix to the Quotation number, in documents.



Pricing Extras

- Identify and include the additional price of non-standard components.
- Amend extras on quotations and invoices or despatch notes.
- You can set up to different categories of extras and apply different discount rates to each.
- Analyse Extras separately for an order.
- Modify discounts for Extras and systems via the pricing page.



Stored Price Lists

- Handle complex pricing strategies.
- Use advanced Price Lists based on matrices in place of mark-up cost only.
- Matrices are setup as part of the data.



Product	Unit	Price	Discount	Net Price
1000	100	1000	10%	900
1001	100	1000	20%	800
1002	100	1000	30%	700
1003	100	1000	40%	600
1004	100	1000	50%	500

Global Changes

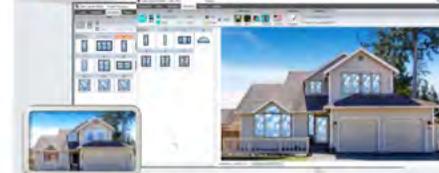
- Simultaneously apply changes to all or selected items of ancient order(s).
- Quickly check for impact of changes.
- Analyse 'what-if' scenarios for various parameters like discounts for commercial contracts.

Note: Global changes cannot be applied to a job once it is scheduled.



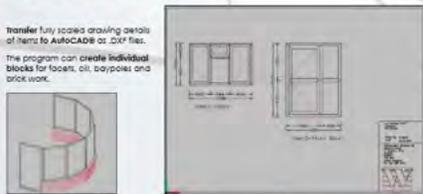
Elevations

- Drag and drop images from a wall chart on to the digital image of the house.
- Easy toggling between original and variant.
- Emailing the quote with the Elevations image.



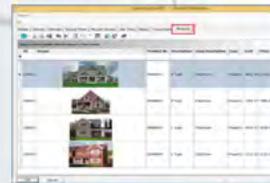
Link to CAD

- Transfer fully scaled drawing details of items to AutoCAD® as DXF files.
- The program can create individual blocks for facers, sill, baypoints and price work.



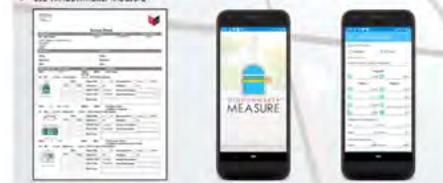
Property Types

Property is a kit type of product which constitutes window and door products. Sales lines for Property products can be added to a Phased Quote, similar to adding one for a standard product.



Surveying

- Generate a predefined format for the survey sheet - allowing 5 measurements for each product ID.
- Use Windowmaker Measure.



Customer Special Terms

- Flexibility to adopt almost any pricing strategy when used with Pricing via Matrices and Extras option.
- Automatically apply customer specific discount rates for each product range.
- Facility to apply separate discounts for Base & Extras prices.
- Apply discount to all the parts of a sales line except extras, using a second level 'line' discount.

Operations – Planning, Scheduling, Purchasing

Survey Scheduling

- Schedule survey of orders to optimally utilise the resources.
- Create your **timetable** via an easy-to-use screen.
- Modify the schedule by **dragging/dropping appointments** within or across the teams.
- Split a single appointment into multiple discontinuous appointments.

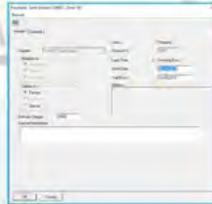


Multiple Sites

- Handle **multiple sites** for factories / warehouses:
 - inventory of stock components for different locations
 - production and delivery schedule across multiple sites
- Create and edit up to **9 sites** for factories/warehouses.
- **Set Rules** to make a site:
 - the default site
 - disallowed (e.g. disallow a 'wood' factory if a 'uPVC' window)
 - tested (e.g. set the capacity required at a specified bottleneck)
- **Sub-batching and trolley parameters** for different sites.

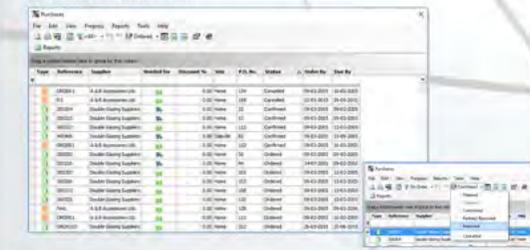
Purchase Scheduling

- Enable all purchases for 'bought-to-order' components to be included as part of the manufacturing schedule.
- **Maintain** a purchase schedule.
- **Re-schedule** purchases and manage unforeseen eventualities, such as non-receipt of supplies, partial receipts or delivery delays.
- **Information** about the slack days, before and after the date of purchase **available at finger tips**.
- Specify the **Production Stage** of which the component will be required.
- Include **'Special Instructions'** notes for a delivery and comments on shortages for 'Partially Received' orders.



Purchase Ordering

Easily manage all your purchases



Production Scheduling

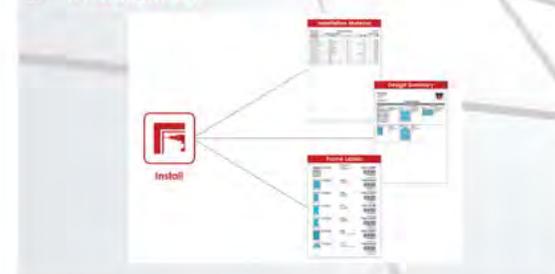
- Create, maintain and use a consistent **production schedule**.
- **Plan production** batches weeks or months in advance.
- Go with the proposed (by WM program) batch for an order or choose another batch.
- **Drag and drop** orders/items from one production batch to another.
- Windowmaker displays the **slack days available** - before and after the date of production.
- You can generate **weekly production loading report** for each bottleneck using integrated Crystal Reports.
- Manage the **production schedule for multiple sites** from the same board.

Delivery Scheduling

- Schedule the **deliveries** of the orders, taking into account **customer routes** and available **capacities**.
- Control the **delivery schedule** to ensure:
 - **Resources** are **optimally used** but not overbooked.
 - **Dates** are **consistent** with the expected receipt of BTO purchases and the **planned production**
- Have a **sound basis for making commitments** to customers.



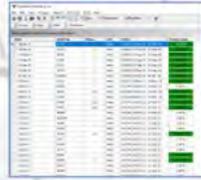
Installation



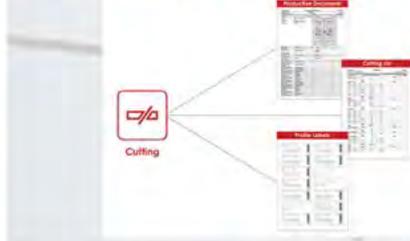
5. Operations - Production

Batching

- Process a batch manually or with scheduling.
- A batch may have single or multiple orders.
- Use a range of features to maximize yield and efficiencies:
 - Sub batching
 - Material optimization
 - Reusable offcuts
- Track the orders on the assembly line.
- Machine links to a variety of saws, working centers and glass cutting tables.
- Generate easy-to-read Work Instructions with graphics:
 - Cutting List
 - Load List
 - Profile Labels, Sain Labels, Frame Labels



Works Instructions



Bar Optimisation

- Automatically organise the cutting sequence of profile pieces to reduce material wastage.
- Increase throughput by minimising saw-head movements.
- Bar Sequence choices include Prioritise butt-welded Pieces and Lowest Slot Numbers. Longest to shortest, Longest to shortest used length.
- Priority Sequence choices include:
 - Shortest to Longest, Longest to Shortest.
- Define the stock length of each individual profile to use different stock sizes of bars.

Note: The functionality can be further increased when combined with the sub-batching, Profile Sorting I, Profile Sorting II, and Re-usable Off-cut options.



Profile Labels

- Automatically generate profile labels for all sales lines in the batch.
- The key information includes:
 - Batch, Slot numbers, Trolley number (if sub-batched)
 - Sales Order and Sales Line numbers
 - Profile stock number
 - Size and direction (width or height)
 - Graphical diagram showing end-cuts, Bar code
 - Cutting angles (if other than 45° or 90°)
- Labels for offcuts are generated too.



Tracking (On-screen Works Instructions)

Using Tracking Client

A role-based client designed specifically for production use, to display on-screen work instruction and allow Orders to be processed by the user.

Key information displayed includes:

- Graphical image of the item.
- Works instruction and information relevant to the frame/sash of that station.
- The Works instruction include:
 - The BOM for specified Cas heads displayed as a list or superimposed on the graphics.
 - The Slot/Trolley Number for the sash and/or sash part and glass.
- Each item or job can be processed manually (by the keyboard), or using a basic hand-held scanner, and the next item in sequence automatically selected.
- Running totals can be displayed, showing frames, sashes, bonus points and the time for the logged-in user.



Remakes

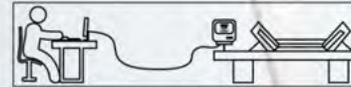
- Handle remakes and replacement orders easily and more efficiently.
- It may be for the full window/door or a part of it.
- Maintain the records of remakes without creating a new order.
- Easily select the product and/or its part that needs re-manufacturing.
- Record the reason for the remake for analysis.



Link to Machinery

Link to Saw

- Control sawing operations automatically by linking Windowmaker to a selected saw.
- Set up upto 9 different saws.
- Handle saws with capability of cutting variable angles on a profile.
- Handle pieces below the minimum and above the maximum cut size.
- Specify V-notch capabilities for a saw.



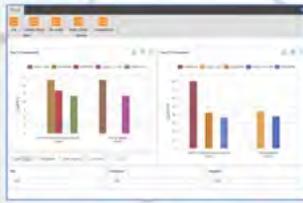
Glass



Stock

Complete stock management from within Windowmaker

- Stock values are dynamically updated creating allocations and de-allocations within Windowmaker as items are used and sent for production.
- Auto-generate stock records when creating new items.
- View stock records & transaction details for a particular stocked component.
- Automatically reorder / replenish the stock of standard items.



6. Operations - Post Production (Management & Accounting)

Invoicing & Accounts

- **Integrate Windowmaker with Sales Ledger** (Accounts Receivable) systems (SAP, QuickBooks).
- Save time and eliminate mistakes by automatically recording **Invoice transactions**.
- **Avoid duplication** of Customer data.
- **Specify Credit Limits** for customers and put a customer account 'On Stop'.
- Set up customer-specific '**Alerts**' to display on Order Entry.
- Automatically **update** the Order balance.
- Check the **customers' credit status** during order entry:
 - Eliminates additional administration work
 - Aids prompt debt chasing
 - Helps avoid the manufacture of goods that may not be paid for

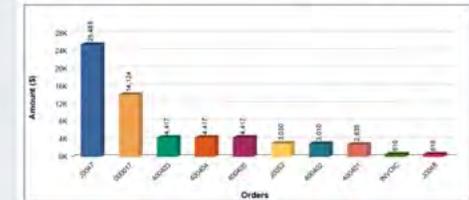
If the credit limit check fails at order entry, the job is placed on hold. A user with appropriate rights is required to override the check.

Management Reports

WMS Windows Top 10 Orders 04/01/2022

Window: 05-01-2022 - 04-01-2022 Order Type: -All- Date: -All- Exchange Rate: 1

Order	Customer	Amount (£)	Cost	Contrib	%
00047	Windle & Dove Dealers	25,484.90	4,270.25	21,214.64	89.24
00007	Acorn Fabrications Co Ltd	11,251.57	1,566.18	9,685.43	89.52
00480	A-B Company Ltd	4,417.13	2,517.86	1,899.27	43.00
00404	Bergman Jakes	4,417.13	2,517.86	1,899.27	43.00
00485	Windle & Dove Dealers	4,417.13	2,517.86	1,899.27	43.00
0002	Alan Doe	3,000.00	575.00	2,425.00	81.21
00482	Edward Wilson	3,000.57	1,550.78	1,449.79	48.32
00481	Thomas	2,850.33	1,480.09	1,370.24	47.95
00100	Flemish Glass	610.98	136.61	474.37	77.77
0048	Christopher Robinson	610.00	140.00	470.00	77.03
TOTAL		62,874.76	17,241.38	45,633.38	72.85



Sovereign Business Process Proposal



Commercial and Contract Management

Features

01 Entering a quote/tender

Commercial Contracts
Sales lines
History

03 Changing / Revising

Global changes
Revisions (Variations)

05 Sending Quotes

Reporting



Quote Input

Quote Sent

Quote status

Reports

Checking 02

Costing summary
Costing pricing
P63

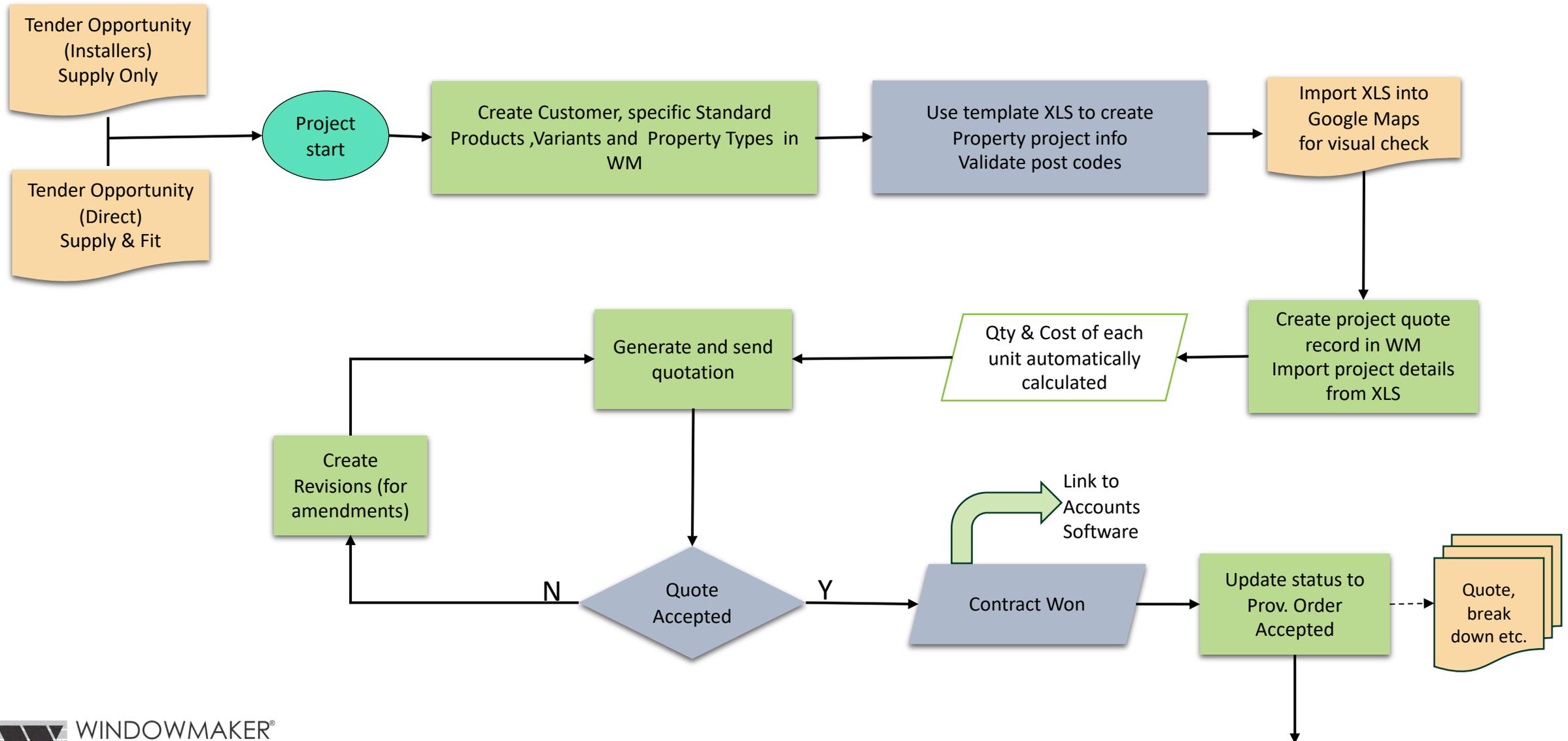
Changes 04

Requote request
Revision

Sending 06

Quotation
Design Summary
Window Schedule
Break down

Commercial and Contract Management – Proposed Flow



Commercial and Contract Management – Videos & Reports

VIDEOS

- [Create Customers, Property Types, Import in Google Maps](#)
- [Create Quote, Generate Quotation, Window & Door Schedule](#)
- [Create Revision, Generate Reports](#)
- [Update Status, Convert to Order](#)
- [Design Summary of Property Types 1 & 2](#)

REPORTS

- | | |
|---------------------------------|---------------------------------|
| Window Schedule | Requote request |
| WM Quotation | Revision |
| Quotation | Costing summary |
| Design Summary | Costing pricing |
| P63 | |

Survey Management

Features

01 Planning Survey

Survey Management
Sales Lines

03 Managing Survey

Surveying
Link to WMM



Order status

Provisional
Order
Accepted
Under Survey

Survey Visit 1
Failed

Survey Visit 2
Failed

Survey
Completed

Final Order
Accepted

Reports

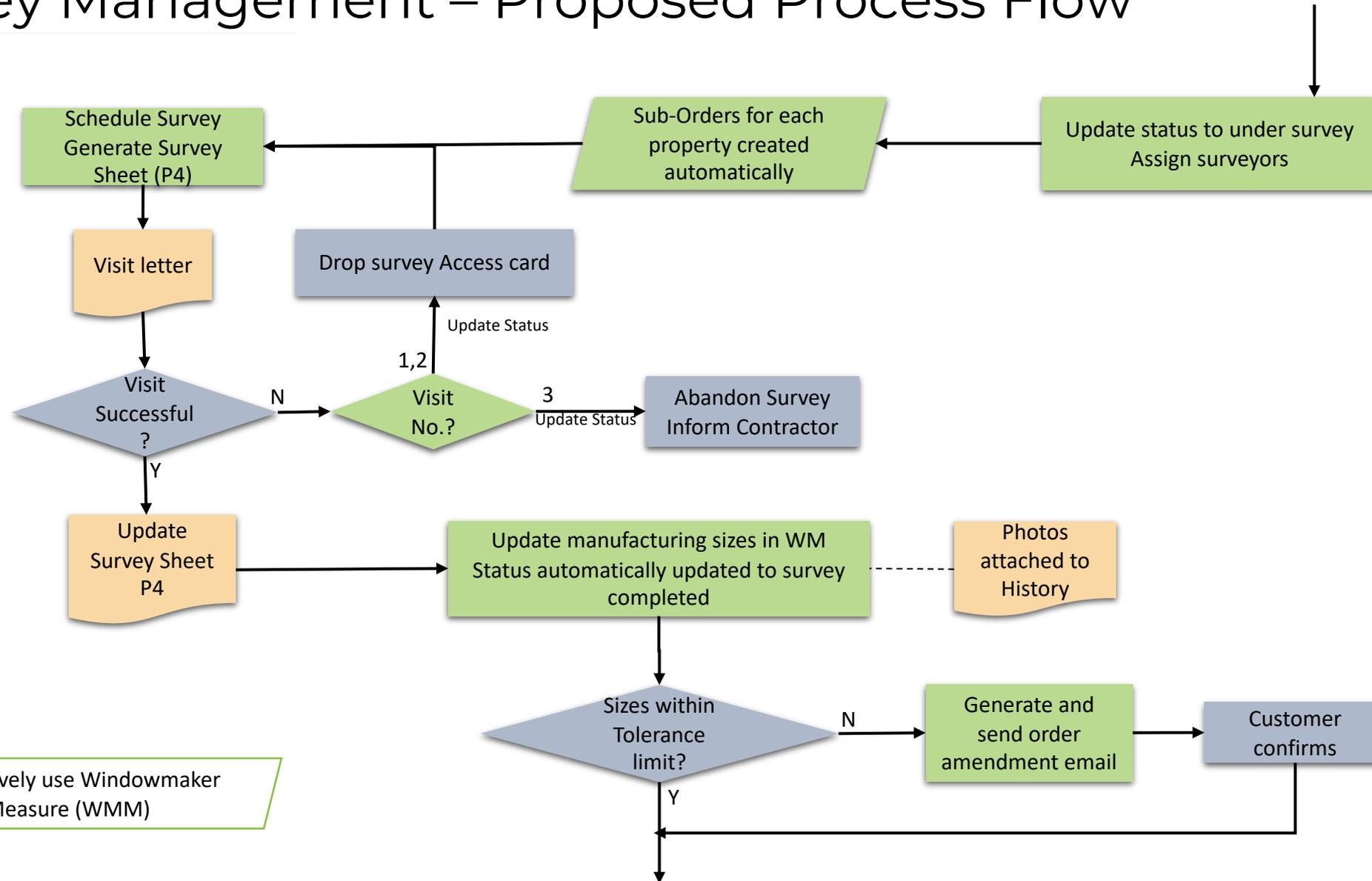
Plans 02

P4
WMM project

Letters 04

Visit Letter
Survey visit letter

Survey Management – Proposed Process Flow



Alternatively use Windowmaker Measure (WMM)

Survey Management – Videos & Reports

VIDEOS

[Create Sub-orders](#)

[Survey Letter, Status Update, Survey Sheet](#)

[P4 Processing-Record Survey Sizes](#)

[Surveying using Windowmaker Measure](#)

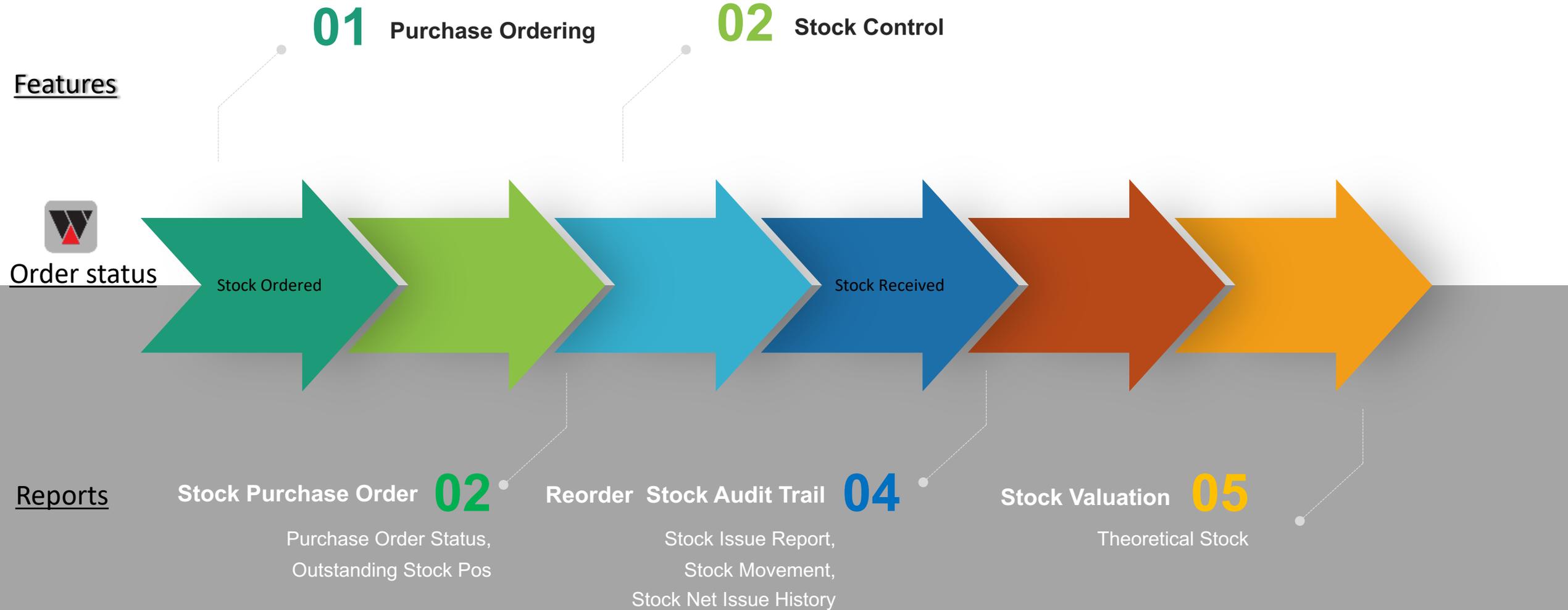
REPORTS

[P4 \(Survey Sheet\)](#)

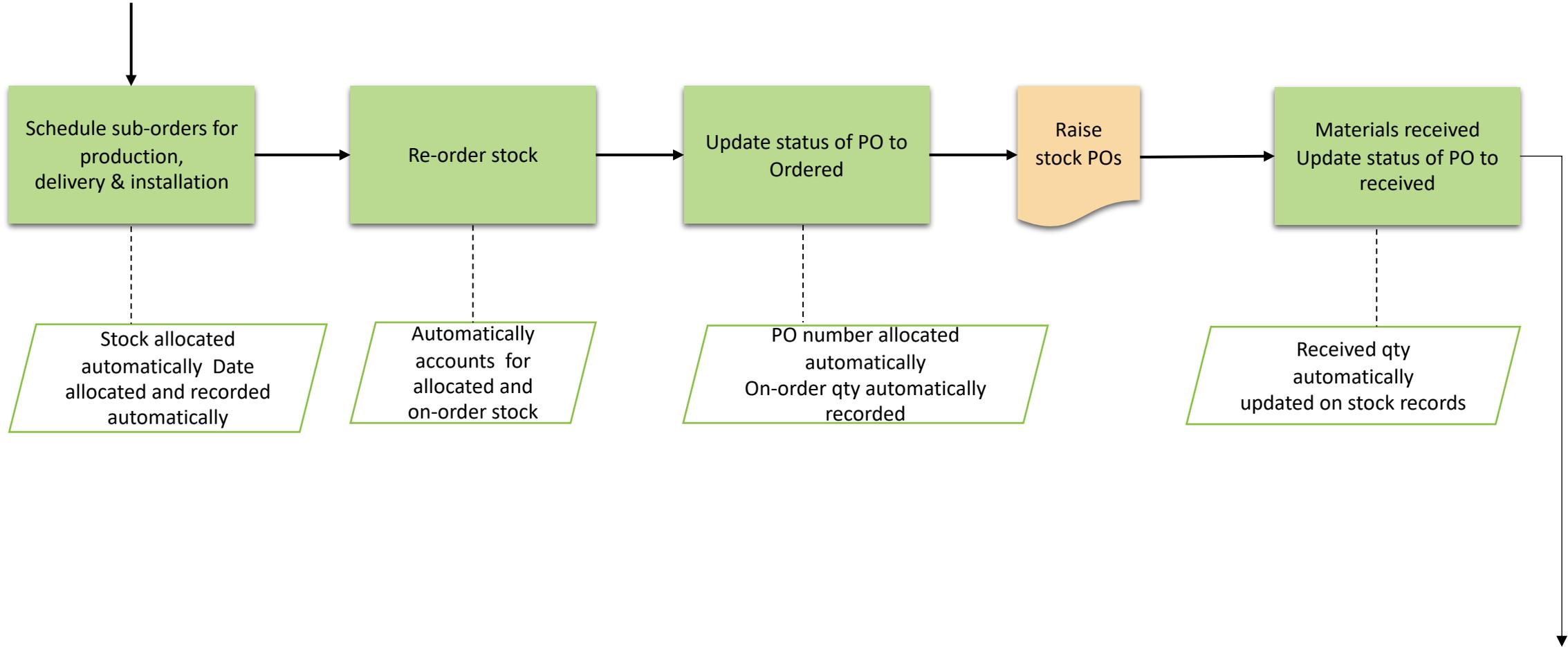
[Survey Visit Letter](#)



Purchasing and Stock Control



Purchasing and Stock Control – Proposed Process Flow



Purchasing and Stock Control – Videos & Reports

VIDEOS

[Schedule Sub-orders, Re-order and Receive Stock](#)

REPORTS

[Stock Reports](#)

- Purchase Order
- Purchase Order Status
- Outstanding Stock POs
- Re-Order Report
- Stock Issue Report
- Stock Movement
- Stock Net Issue History
- Theoretical Stock



Production Planning and Manufacturing

Features

01 Production Planning

Production Work Instruction
Bar Opt and Resuable Offcuts

03 Sub Batching

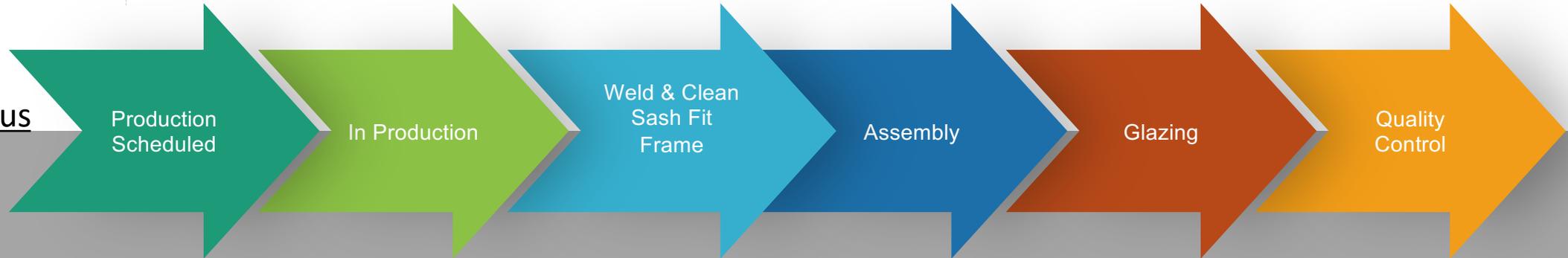
Production Planning
Tracking

05 Remakes

Link to Machinery



Order status



Reports

Production Reports 02

Production Plan
Production Schedule
Production Loading
Cutting List
Load List
Requirements Summary

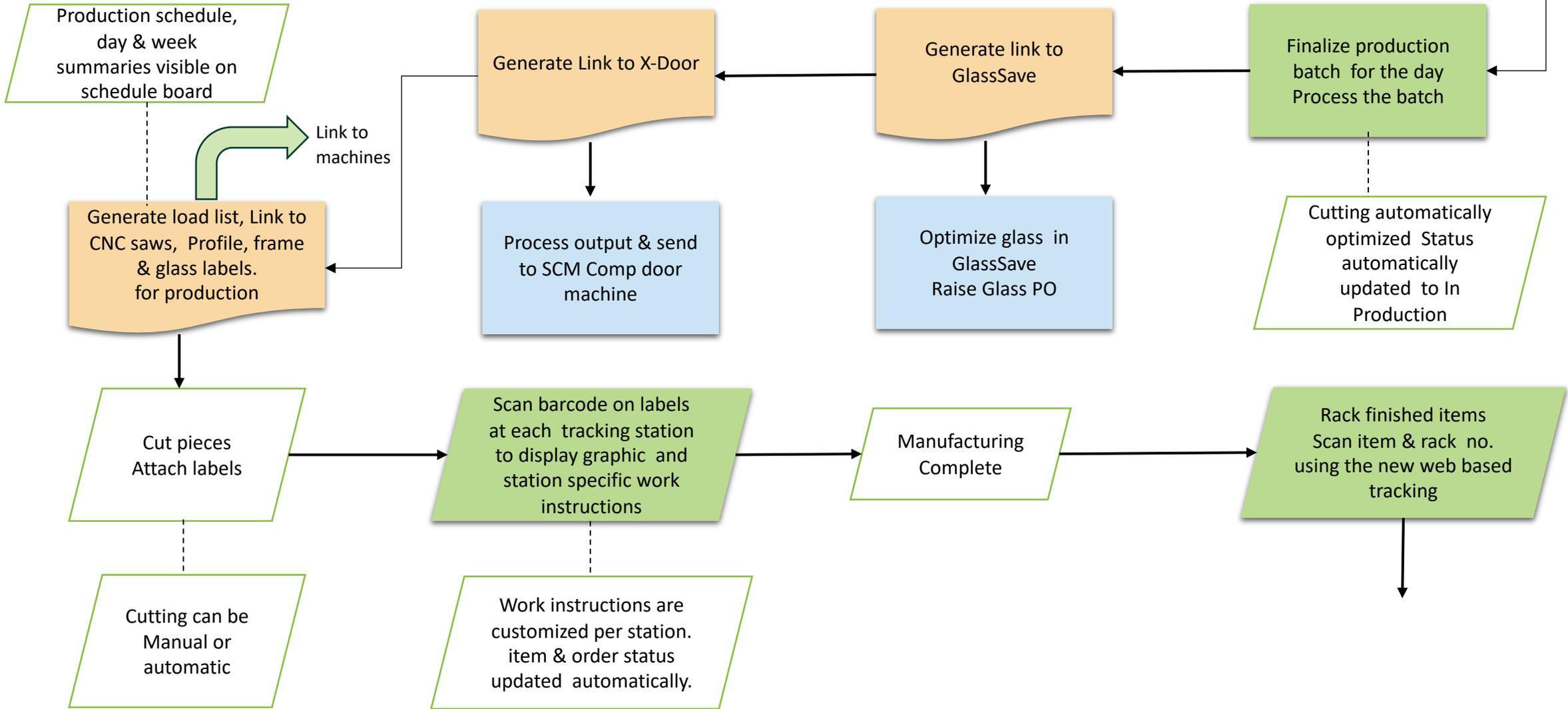
Automation Reports 04

Link to GlassSave
Link to Machines
Link to X-Door
Profile Labels
Frame Labels
Glass labels

Output reports 06

Production Document
Order Status Summary
Work in Progress (View)
Production Output
Contract Summary

Production Planning and Manufacturing



Production Planning and Manufacturing – Videos & Reports

VIDEOS

[Production Planning](#)

[Tracking, WIP, Order Status Summary](#)

[Tracking using Web](#)

REPORTS

[Load List](#)

[Cutting List](#)

[Requirements Summary](#)

[Link to GlassSave \(Optiway Sample\)](#)

[Link to X-Door](#)

[Profile Labels](#)

[Frame Labels](#)

[Glass labels](#)

[Production Document](#)

[Order Status Summary](#)



Despatch, Installation and Invoicing

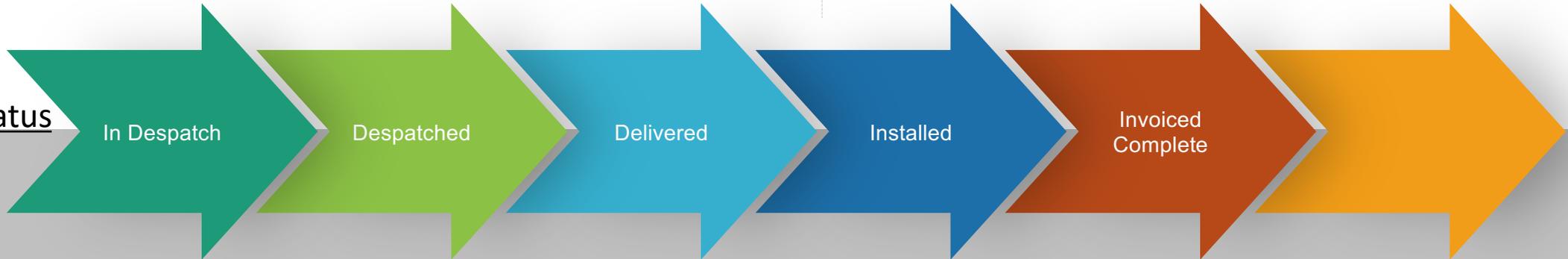
Features

01 Despatch
Scheduling

03 Installation
Scheduling



Order status



Reports

Order Status **02**

Phased order status summary

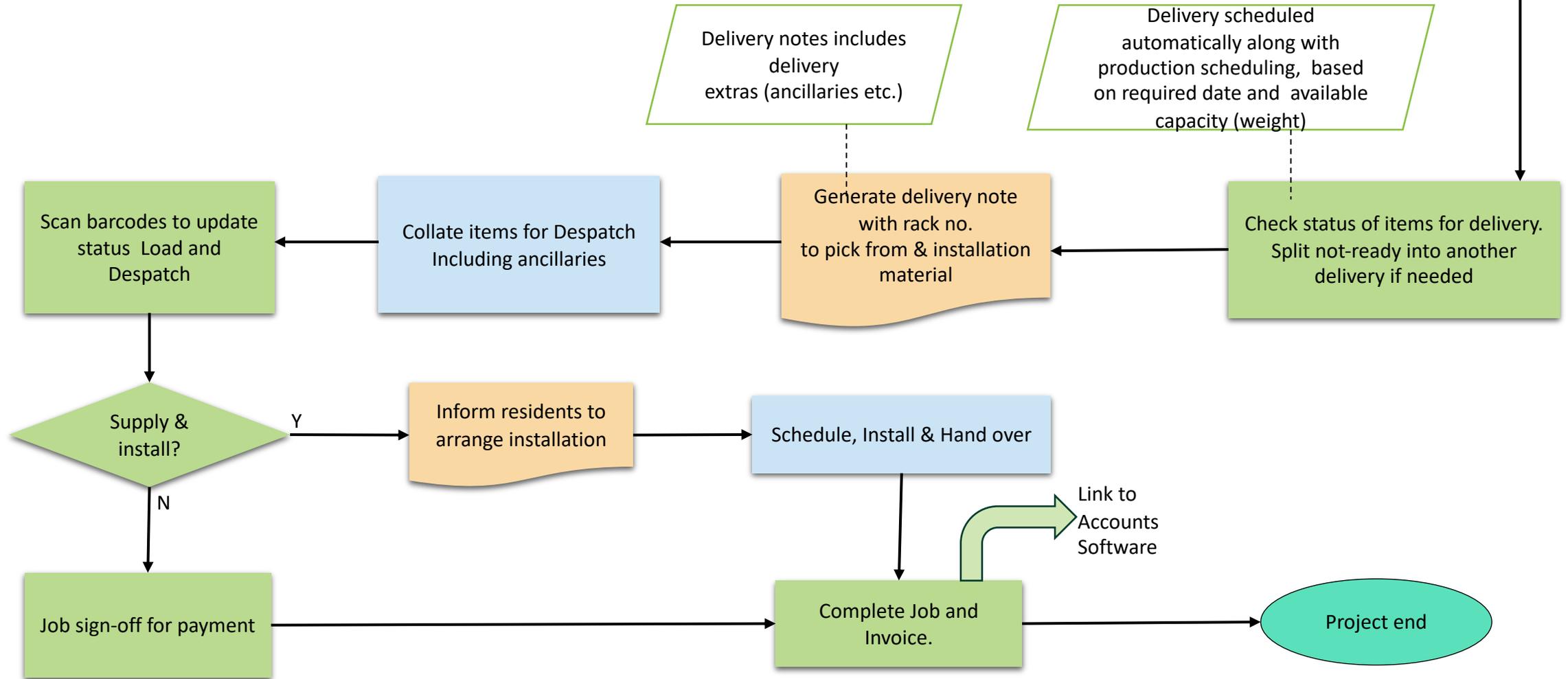
Despatch Reports **04**

Due for Despatch
Delivery Notes

Install Reports **05**

Picking List
Installation Material

Despatch and Installation– Proposed Process Flow



Despatch, Installation and Invoicing – Videos & Reports

VIDEOS

[Despatch-CrateNos, Picking List, Delivery Notes Installation](#)

[Remakes](#)

REPORTS

[Picking List](#)

[Delivery Notes](#)

[WM Delivery Notes](#)

[Installation Material](#)



Windowmaker Solution Proposed

Windowmaker Sales License 01



This includes

£116

£55

- Hundreds of Standard Designs
- Angled and Arched shapes,
- Bays, Bows, Georgian, Leaded
- Entrance Doors
- Dashboards, Standard Reports
- Global Changes
- Revisions
- **Standard Products**
- **Special Customer Terms**
- **Survey Scheduling**

✓ Price for Main user and subsequent additional user.

✓ Per user per month.

Windowmaker Professional License 02



This includes All standard functionality of 'WM Sales'

£384

£95

- Bar Optimization & RE
- Labels
- Commercial Contracts
- Surveys Scheduling
- Remakes
- Purchase & Sub-batching
- **Link to Accounting software**
- **Link to Glass Optimizer**
- **Stock Control module**
- **Adv. Production Scheduling**
- **Adv. Deliveries Scheduling**
- **Adv. Installation Scheduling**

✓ Price for Main user and subsequent additional user.

✓ Per user per month.

eCatalog License 03



£25

For the Veka eCatalog.
For new change updates to the Veka systems supplied.

✓ Per month.

Windowmaker Services 04



Daily Rate for:

£650

- Development/Customization and machinery links
- Report Customization
- Remote Operational Training

✓ Per Day

Why Choose Windowmaker Software

One Software

Multiple materials,
products, suppliers.
One Solution.

Highly Customizable Experienced

consultants customising
your requirements.

Regular Updates

Enhanced software
updates

Powerful Configurator

Rules based 'open'
configurator

15+ Hrs Support

Worldwide offices,
large dedicated team
provide 15+ hours of
support

Link to Software/Machines

Windowmaker can link
to accounts software,
CRM, ERP, machinery,
etc

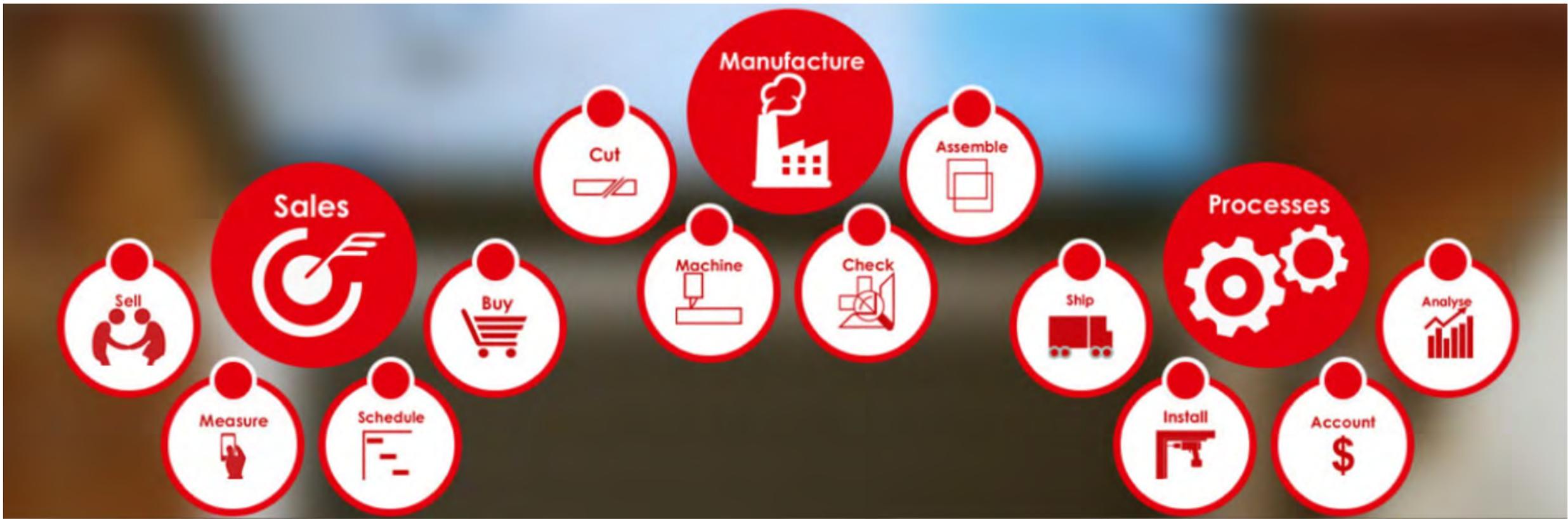
Questions



Questions and Discussion

Please let us know if there are any topics you wish to discuss further.





Thank You!