
Paradigm Plus Training

By Kohltech Windows
& Entrance Systems

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Paradigm Plus – Kohltech CenterPoint Quotation Software User Manual

➤ PREFACE

This software will give you the ability to enter quotes for your customer using the most up-to-date information available. It is the same software that is used by Kohltech when entering orders for manufacturing. When you login, you are actually connecting to the software in Debert, NS, via the Internet.

You also have the ability to use the software without being directly connected to the Internet but will be asked after 7 days to connect via the Internet to receive any up-dates that may be there.

The Kohltech web page is displayed when you first enter the software and can be accessed at anytime.

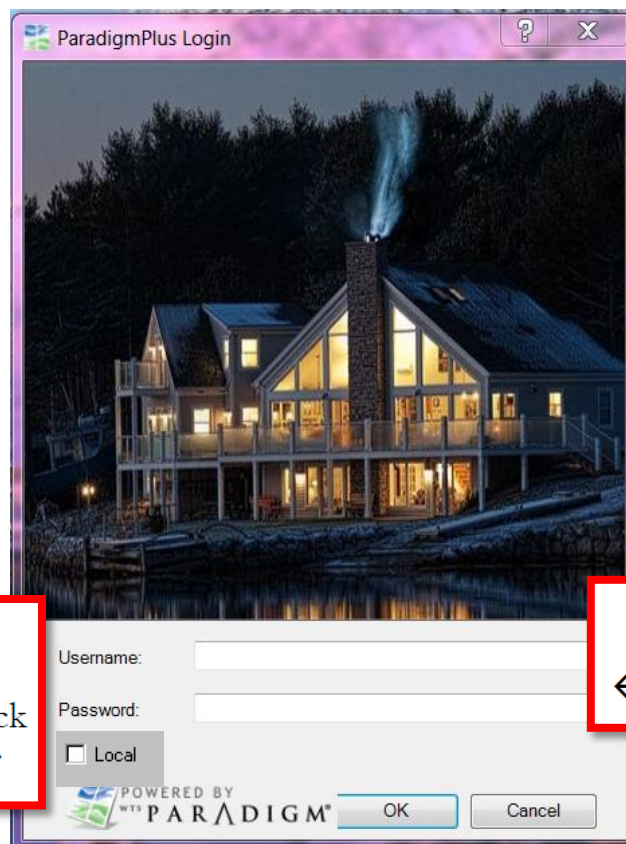
➤ **LOGGING IN:**

Once the software has been activated this icon will be on your desktop:



Double click on this icon to start the software.

Once the Login screen appears enter the user name and password assigned by Kohler/Kohltech.



To use the software without connecting through the Internet click on the 'Local' button →

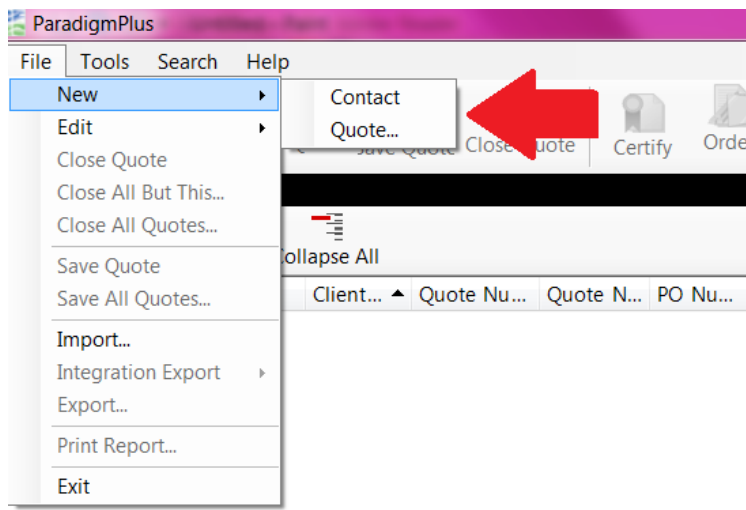
To login to the software enter your 'Username' and 'Password' ←

Prior to starting quotes there are several things that each user can do to customize the software. Preferences can be set that are specific to the login name used. Contact names can be set-up and Project folders can be created. The sales tax can be set as can the markup/discount for each contact or for each quote.

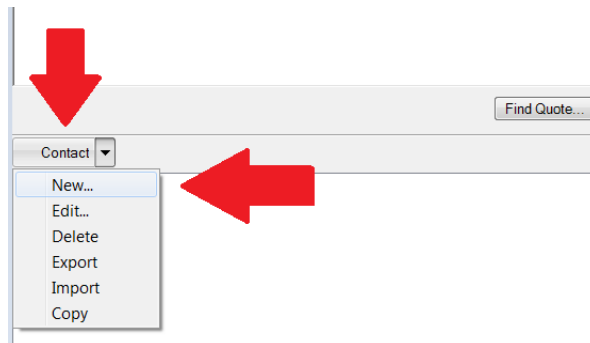
- **CREATING CONTACTS** – is used in order to avoid entering the same contact information for subsequent orders. This is a great way to use this tool for business customers and contractors.

Two options to create a contact:

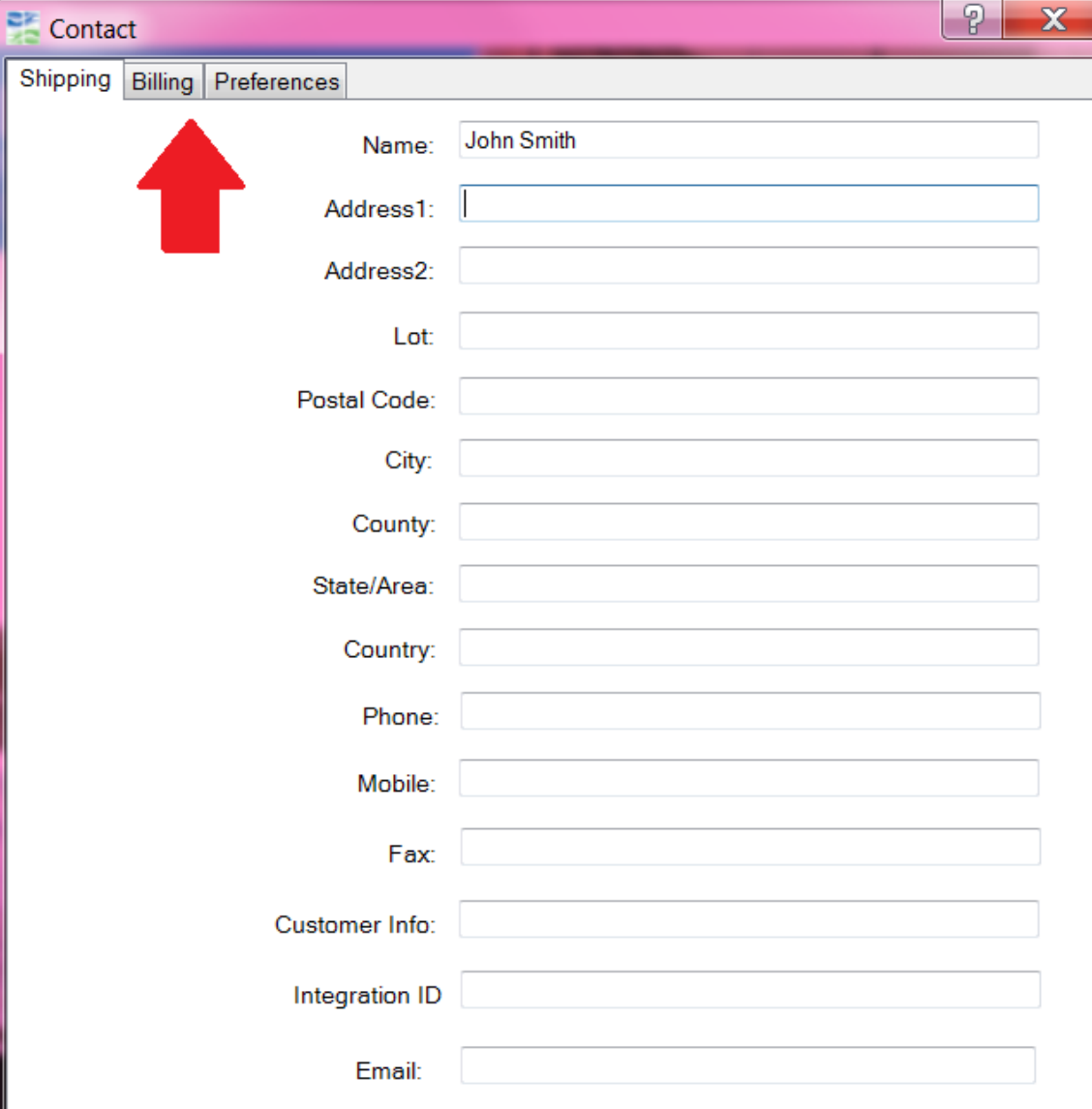
1. File, New, Contact
 2. Contact, New
1. To create new Contacts or Quotes, you may create a new contact by clicking on File in the top left hand side of the screen. From there you can choose to create a new contact or begin a new quote:



2. You may also create a new contact by going **half way down the left hand side under the Find Quote** button and start here:



A new window will open up and you can enter the Shipping, Billing and Preferences for each contact by clicking onto each of the tabs. You can fill out as much or as little of what you want in these fields as it will pertain to only this contact. When this contact is selected for a quote then the information entered will also be on the printed report.



The screenshot shows a software window titled "Contact" with a standard Windows-style title bar (minimize, maximize, close buttons). Below the title bar are three tabs: "Shipping", "Billing", and "Preferences". A large red arrow points directly to the "Billing" tab. The "Billing" tab is active, displaying a form with the following fields:

- Name: John Smith
- Address1:
- Address2:
- Lot:
- Postal Code:
- City:
- County:
- State/Area:
- Country:
- Phone:
- Mobile:
- Fax:
- Customer Info:
- Integration ID:
- Email:

➤ **PREFERENCES:**

There are **3 locations** where you can enter preferences and all 3 serve a different purpose but have all the same information within each area:

1. Under “Contact” - preferences specific to a **contact**.
2. Under “User Preferences” - preferences specific to the **user**.
3. Under “Line Items within a Quote Preference” – preferences to a specific **quote** only.

NOTE: Do NOT use the scrolling feature of your mouse (if you have one) as it could change your selection if it is still within that field at the time that you scroll so be aware of this.

1. **Contact Preferences:**

In the Preference tab, you can enter the following order preferences for our products for that specific customer. Click SAVE and it will automatically select those options to all products entered from this point on.

Unit	Unit Type	No Preference
Shrink Wrap Product	No Preference	
Frame		
PVC Color	No Preference	
Frame Stock	No Preference	
Frame Finish	No Preference	
Painting Color Exterior	No Preference	
Glass		
Glass Type	LoE Argon	
Glass Tint	No Preference	
Tempered/Laminated Glass	No Preference	
Grilles		
Grille Type	No Preference	
Grille Color	No Preference	
Grille Pattern	No Preference	
Typical Daylight Opening	No Preference	
Casing Options		
Exterior Accessories	No Preference	
Remove Nailing Fin	No Preference	
Protective Film	No Preference	
Jamb		
Jamb Extension	No Preference	
Interior Accessories	No Preference	
Hardware		
Hardware Color	No Preference	
Nightlock	No Preference	

To set a preference, click on the option that you wish to change then click on 'No Preference and choose the correct answer from the pull down menu (little arrow).

This is a sample of what it will look like when a preference is selected. So If LoE Argon is set as a preference, all quotes that are entered will now automatically have LoE Argon Glass.

The next tab within this preferences folder is the pricing preferences for markup, tax, discounts etc for this specific CONTACT. Fill out so that it will automatically calculate these for you for your printouts for that specific contact.

Pricing, discount codes & Disclaimers can be set up for each contact however you can also do this under User Preferences so it shows for every order. **Contractors** would be a good time to use these features if you plan to do a better discount/ pricing compared to regular clients.

For example the markup has been set to 25% and the 15% sales tax will be applied to every quote.

NOTE: Markup is NOT Gross Markup; it is a percentage that is applied to the net price to generate your selling price to your customer. Gross Margin calculates automatically for you when you put in your markup percentage.

Field	Value
Markup Percentage (%)	25
Gross Margin (%)	20
Markup Amount (\$)	0
Tax 1 (%)	15
Tax 2 (%)	0
Freight Percentage (%)	0
Freight Amount (\$)	0
Freight Taxable	False
Labor Percentage (%)	0
Labor Amount (\$)	0
Labor Taxable	False

Buttons: Load Tax Code, Save, Cancel

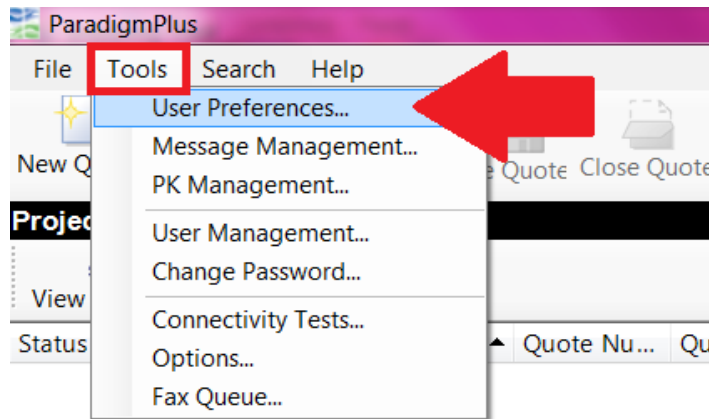
There is also a disclaimer you can add to your quotes for that specific contact however if it is the same disclaimer you want for all contacts then you can put this on your user preferences so it shows on ALL clients.

Remember to click **SAVE** in order to show this on quote print outs. You can also add or edit this message at anytime.

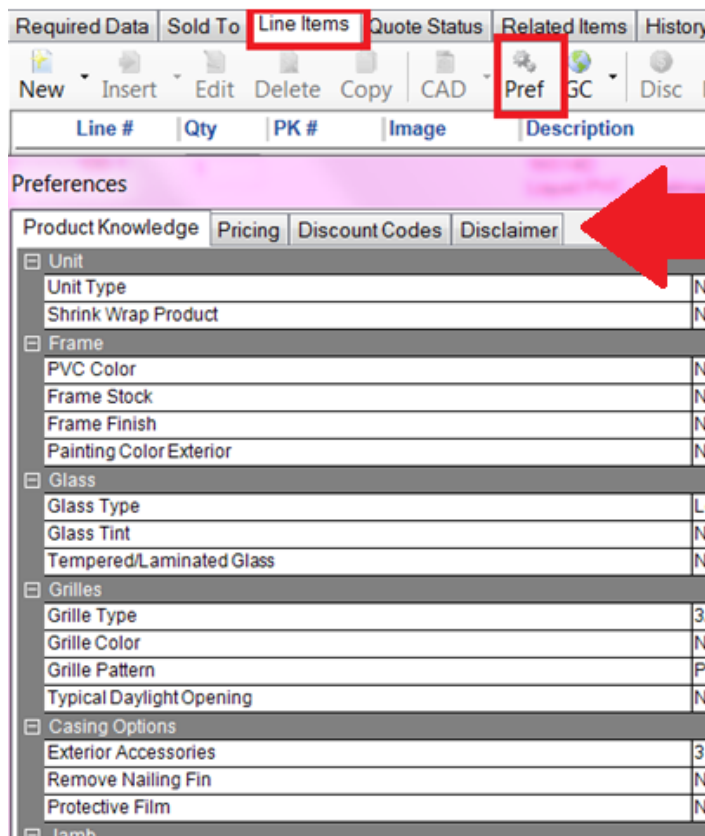
NOTE: All quotes are valid for 30 days.

Buttons: Save, Cancel

2. **User Preferences** – used for all quotes done up for that specific user and it will be applied onto every quote. This would be the area where the pricing, discount codes and disclaimer would be beneficial for ALL contacts within the USER.



3. **Quote Preferences...** this will be used ONLY for that specific QUOTE and is not attached to the actual contact or user preference in future quotes.



As you can see the same tabs reflect on all three options of preferences.

➤ PROJECTS

A project can be customized to whatever you want as this will give you a way to sort through your quotes. It can be created in any manner you like such as: users at the office, jobsite projects, contractor's names, installed sales, cash sales, etc. A project will then serve the purpose of quotes being put into that project folder.

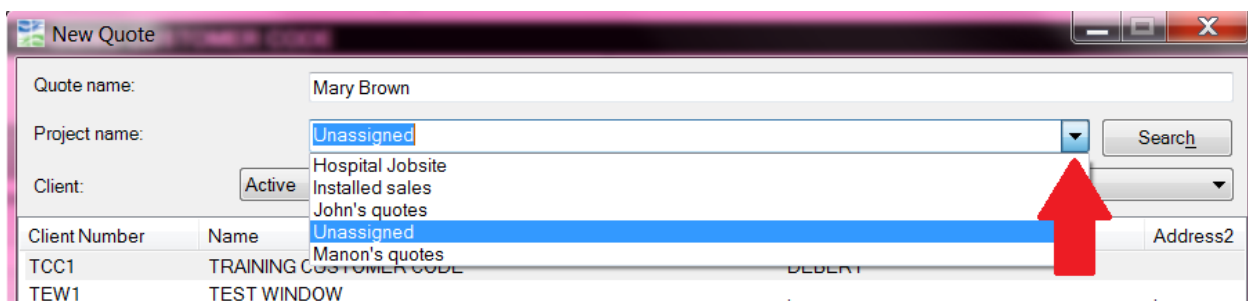
You can **create a project folder** in the following manner:

1. When starting a NEW QUOTE you simply type the project name you want to create along with the Quote name (usually the customer name) and when you save this quote it will create this project folder in your TREE directory:



The screenshot shows a window titled "New Quote" with a pink header. It contains three input fields: "Quote name:" with the text "Mary Brown", "Project name:" with the text "Unassigned", and "Client:" with the text "Active". A red arrow points to the "Project name" field.

2. Or if you already have a project name created then you can go to the arrow button and pick from the drop down menu and it will save this quote within the folder you selected within your TREE directory:



The screenshot shows the "New Quote" window with the "Project name" dropdown menu open. The menu lists several options: "Unassigned", "Hospital Jobsite", "Installed sales", "John's quotes", "Unassigned", "Manon's quotes", "TRAINING CUSTOMER CODE", and "TEST WINDOW". A red arrow points to the dropdown arrow button. The "Quote name" field contains "Mary Brown" and the "Client" field contains "Active".

3. Once you save the quote after entering your line items this is what it will look like in your TREE directory (the project name is in bolded lettering):

ParadigmPlus

File Tools Search Help

New Quote Quick Find Copy Quote Save Quote Close Quote

Installed sales - Mary Brown glider window - 1357309 -



Expand All Collapse All

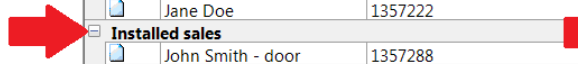
Project ▾

Status	Quote Name	Quote Number
[-] Hospital Jobsite	Jane Doe	1357222
[-] Installed sales		
[-] John Smith - door		1357288
[-] Mary Brown glider window		1357309
[-] Parts stock		1360310
[-] John's quotes		
[-] Luke Skywalker		1357217
[-] Jabba Hutt		1357220
[-] Manon's quotes		
[-] James Woods		1357103
[-] Unassigned		
[-] John Doe		1360361

When a new project is added this is what it will look like and it will start a TREE directory (the jobs are “branched” off the main folder).

This tool is a good way to separate and easily identify quotes.

You can also expand or collapse these project folders at any time by clicking on the  button and then it will look like this  as you see below:



Status	Quote Name	Quote Number
[-] Hospital Jobsite	Jane Doe	1357222
[-] Installed sales		
[-] John Smith - door		1357288
[-] Mary Brown glider window		1357309
[-] Parts stock		1360310
[-] John's quotes		
[-] Luke Skywalker		1357217
[-] Jabba Hutt		1357220
[-] Manon's quotes		
[-] James Woods		1357103
[-] Unassigned		
[-] John Doe		1360361

Projects

Expand All Collapse All

Project ▾

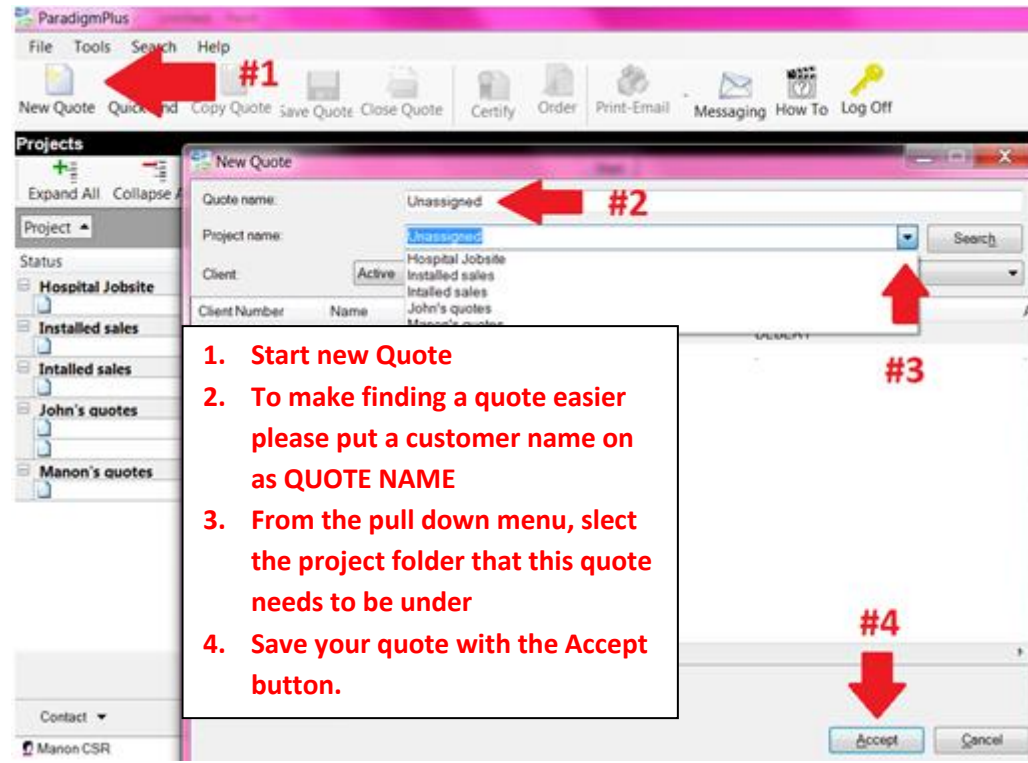
Status	Quote Name	Quote Number
[-] Hospital Jobsite	Jane Doe	1357222
[-] Installed sales		
[-] John Smith - door		1357288
[-] Mary Brown glider window		1357309
[-] Parts stock		1360310
[-] John's quotes		
[-] Luke Skywalker		1357217
[-] Jabba Hutt		1357220
[-] Manon's quotes		
[-] James Woods		1357103
[-] Unassigned		
[-] John Doe		1360361

You can also click on Expand All or Collapse All and it will do this for each folder within your Tree Directory.

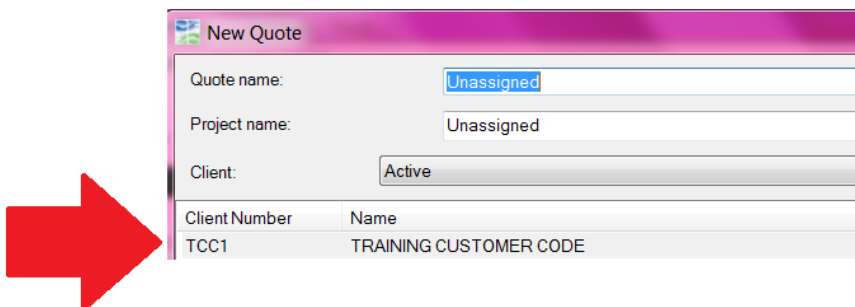
Each of the columns can be sorted as well as you can see the little sorting arrow next to Project. It is sorted in ascending (A-Z) in this example by Project name. If you click on the column for either: Status, Quote Name or Quote Number, it will sort by those columns within each project. NOTE: if arrow is pointing down then it is sorted in descending format.

➤ BEGINNING A WINDOW QUOTE:

To start entering a quote, click on the 'New Quote' button in the top left of the screen or select 'New Quote' from the File menu. The following screen will then appear:

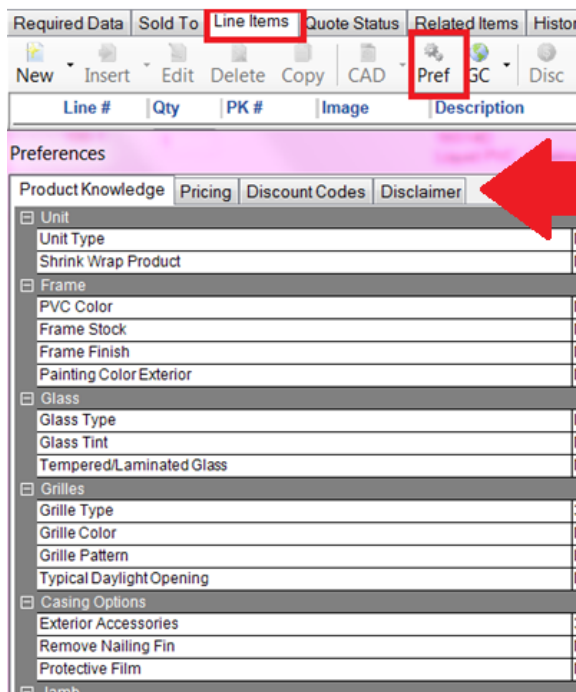


NOTE: The client number information will be your store information only along with your discount structure included for all quotes.



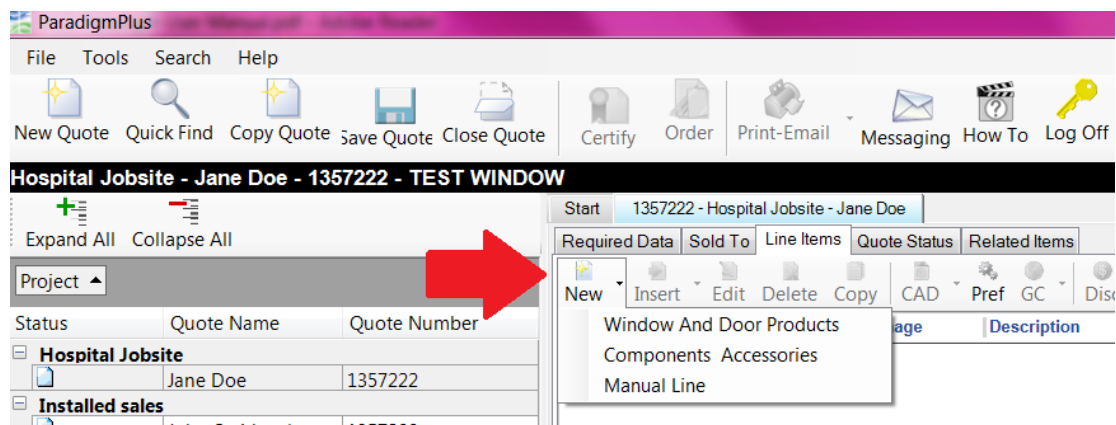
Once the Accept button has been clicked to proceed entering the quote, the user may setup Quote preferences. These Quote preferences will override any preferences that were setup using the 'User Preferences' feature that is accessed through 'Tools' and it will not carry on to the next quote entered. It will ONLY be applied to this specific quote if entered at this time.

Preferences within a **QUOTE**...this will be used ONLY for that specific QUOTE and is not attached to the actual contact or user preference in future quotes. (See pages 7-9 for full details).

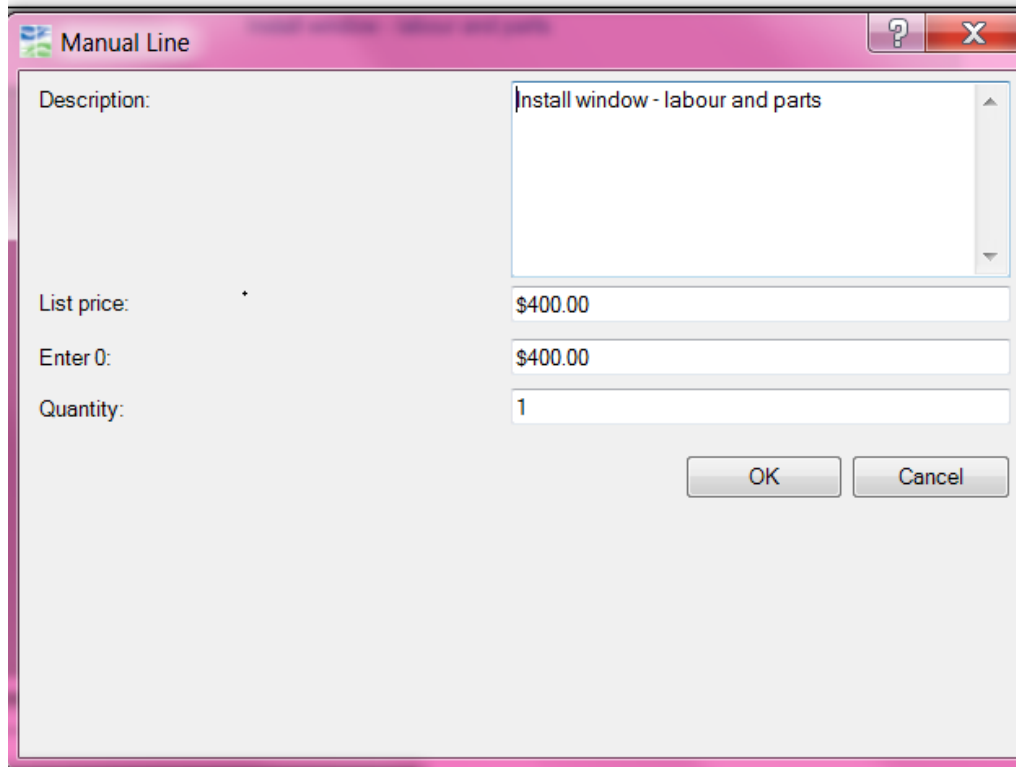


To continue without **creating any preferences** for a quote then simply click on the New button and then it will default to Windows And Door Product. If you click on the New button's tiny arrow, it has a drop down menu for 3 options:

1. **Window and Door products** (automatically selected if you click on New button)
2. **Components Accessories** (used when piece parts are needed – handles, sash stop, etc)
3. **Manual Line** is used for Dealer purposes only (good to use for inserting anything you want printed on the quote – labour charge, delivery fee, etc.)



A manual line looks like this and you can enter whatever information you want to appear within the quote. This is for Dealer/External use only...and not used by Kohltech at all.



The screenshot shows a 'Manual Line' dialog box. The title bar includes a question mark icon and a close button. The dialog contains the following fields and values:

Field	Value
Description:	Install window - labour and parts
List price:	\$400.00
Enter 0:	\$400.00
Quantity:	1

Buttons: OK, Cancel

NOTE: These do not show up or is seen on our end with respect to invoicing from Kohltech.

➤ **COMPLETE LISTING OF ALL THE BUTTONS AND TABS WITHIN A QUOTE**



1. **START** – This will take you to the Kohltech website.
2. **REQUIRED DATA** - 3 tabs within this field

A screenshot of the 'Required Data' tab in the Kohltech system. The tab is highlighted with a red box. Below the tab, there are several input fields: 'Purchase Order', 'Order Taken B' (with 'ParadigmPlus' entered), 'Order Placed B' (with 'training' entered), 'Ship Via:' (with 'Delivery' selected), and 'Date Required' (with '18/01/2017' entered). There is also a 'Tag:' field. To the right of these fields is a 'Comment' box. At the bottom of the form, there are two checkboxes: 'Ship Complete' and 'Send Order Acknowledgement', both of which are checked. A red box highlights these two checkboxes.

- A. **Required Data** - this tab will allow you to put in your PO number, delivery option or pickup, date required for shipping/pickup and the Tag name for your order. Ship Complete - if you want this order in ONE shipment then put in check mark OR if you want items shipped as they are completed uncheck the box (good to do if there are items that are painted and/or non stock items which hold up entire order). Send Order Acknowledgement – check off if you do NOT need an acknowledgement however this would also show the “scheduled” delivery date.
- B. **Shipping** - this tab displays your shipping address
- C. **Load Dates** - this tab is **for CSR’s only** – it displays the load date for each of the line items on the quote...please reach out to your CSR if you need to get these dates.

3. SOLD TO – This tab is where you enter pertinent information such as:

- A. Put a Customer's name for your quote so you can easily find it within your Tree Directory and for the "Find Quote" option.
- B. You can select a project name already created within your Tree directory OR type in new project name OR Search for a Project (not normally used as it would show in your tree directory on the left).
- C. You can include a Contact to be attached to the quote as well
- D. Or Create Contact if not entered into the system already.

The screenshot shows the 'SOLD TO' tab in a software interface. The interface has a top navigation bar with 'Start', 'Unassigned - Unassigned', and 'Line Items'. Below this, there are tabs for 'Required Data', 'Sold To', 'Line Items', 'Quote Status', and 'Related Items'. The 'Sold To' tab is active. It contains fields for 'Quote Date' (January 18-17), 'Quote' (Unassigned), 'Project' (Unassigned), 'Client' (TRAINING CUSTOMER CODE), 'Contact' ((unassigned)), and 'PO Number'. There are 'Search' and 'Change' buttons next to the 'Project' field. Below these fields, there are checkboxes for 'Use Contact's address' (checked) and 'Create Contact'. At the bottom, there are input fields for 'Name', 'Address1', 'Address2', and 'Lot'. A red box highlights the 'Shipping' tab, and a red arrow points to the 'Create Contact' checkbox. Another red arrow points to the 'Search' button. A large red arrow points to the 'Shipping' tab. A red box highlights the 'Job Info' tab, and a red arrow points to the 'Create Contact' checkbox. A red box highlights the 'Comment' tab, and a red arrow points to the 'Create Contact' checkbox.

SHIPPING/BILLING – this information will default to what was set up with the contact but if no contact was selected then the information can be manually entered now.

JOB INFO – this information will not be printed anywhere and can only be accessed when the quote is open.

COMMENT – this information cannot be accessed by Kohltech and will not print on any reports.

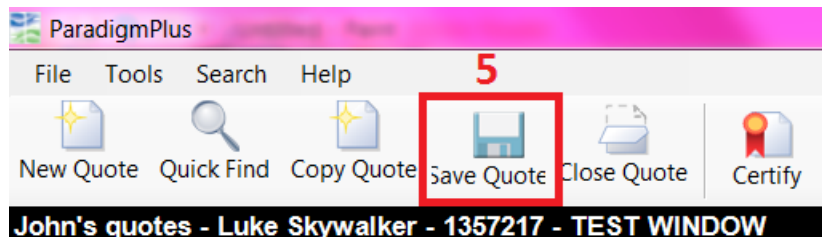
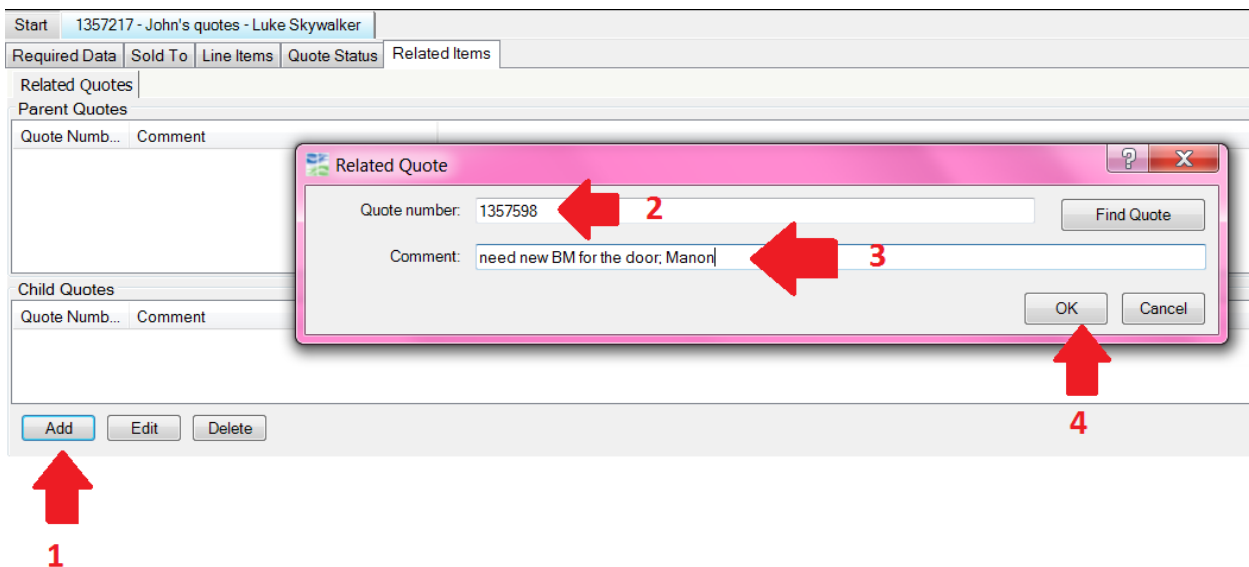
- 4. LINE ITEMS** – This is the tab that the line items are entered and displayed on. Most of the work on a quote is completed on this tab (details of how to order items will be shown on page 18).
- 5. QUOTE STATUS** – Once a quote has been turned into an order the progress of a quote may be tracked using this tab
- 6. RELATED ITEMS** – This tab is used to link orders together as parent/child relationship when replacing items, parts, from the original order along with any notes/comments.
- 7. QUOTE STARTED** – this tab will be created with a new quote created and it will show the quote name

- **RELATED ITEMS** – this tab is used to link orders together.

A parent quote/order is the original quote that was generated and essentially ordered. The child quote would be a copy of the items or parts that was needed from the original order along with including a note/comment. The steps are as follows:

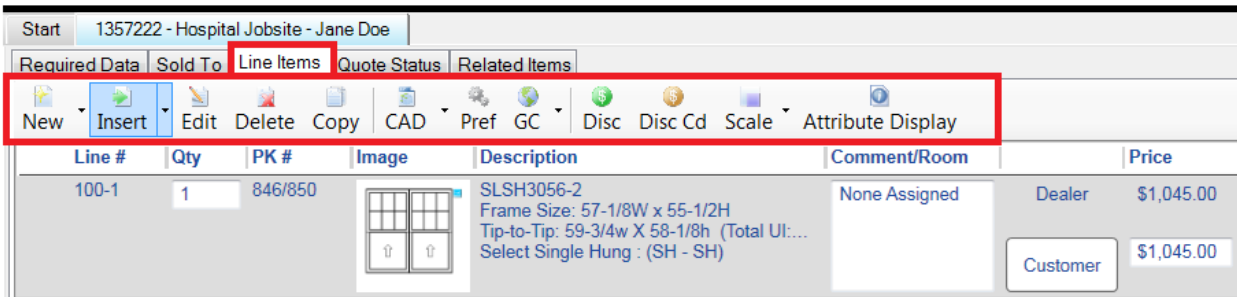
Find the parent order and ensure that the child order is saved and NOT opened:

1. Click the “Add” button a window will populate (as shown above) for you
2. Enter the quote number (child quote)
3. Add a note/comment about this child account. TIP – include your name or initials for future reference should there be any questions related to this order.
4. Click “OK” to attach this information onto the child quotes section.
5. Click “SAVE QUOTE” so that it saves it on the server with the Parent Quote.



➤ **TABS WITHIN LINE ITEMS:**

Once you have saved your line items there are **more options** available to you within the line items tab.



New: This button is how you add a new window/door (also component/manual line if you click on the little menu arrow).

Insert: This button will allow you to insert a window/door into a specific spot within the quote. To do this click on the line item that you want to put the new window/door into. For example line 2 and then click the INSERT button and enter the window as you normally would. Once you have finished entering the window/door it will now be line 2 and all the other items below will have been pushed down and re-numbered.

Edit: this button will allow you to edit an existing line item or if you double click on the line it will also open the line to allow you to make changes.

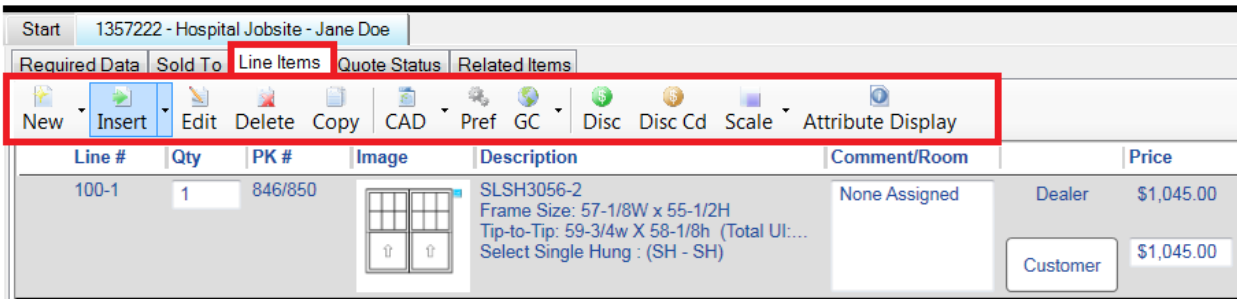
Delete: This will allow you to delete a line item. Make sure you are on the correct line item before hitting this button.

Copy: This will allow you to make an exact copy of a line. To do this click on the line you want to copy and click the COPY button and it will copy it on your quote as the last line item. Once it has been copied you can EDIT the line to make any necessary changes. ***REMEMBER – this will make an exact copy of the line – even notes in the comment/room section will be copied***

CAD: This button will allow you to export a line drawing to DXF format that can be viewed in AutoCAD.

Pref: This button will allow you to set up preferences for a quote, both options on product knowledge, pricing (markups, margins, etc), discount codes and disclaimers.

Continued same diagram:



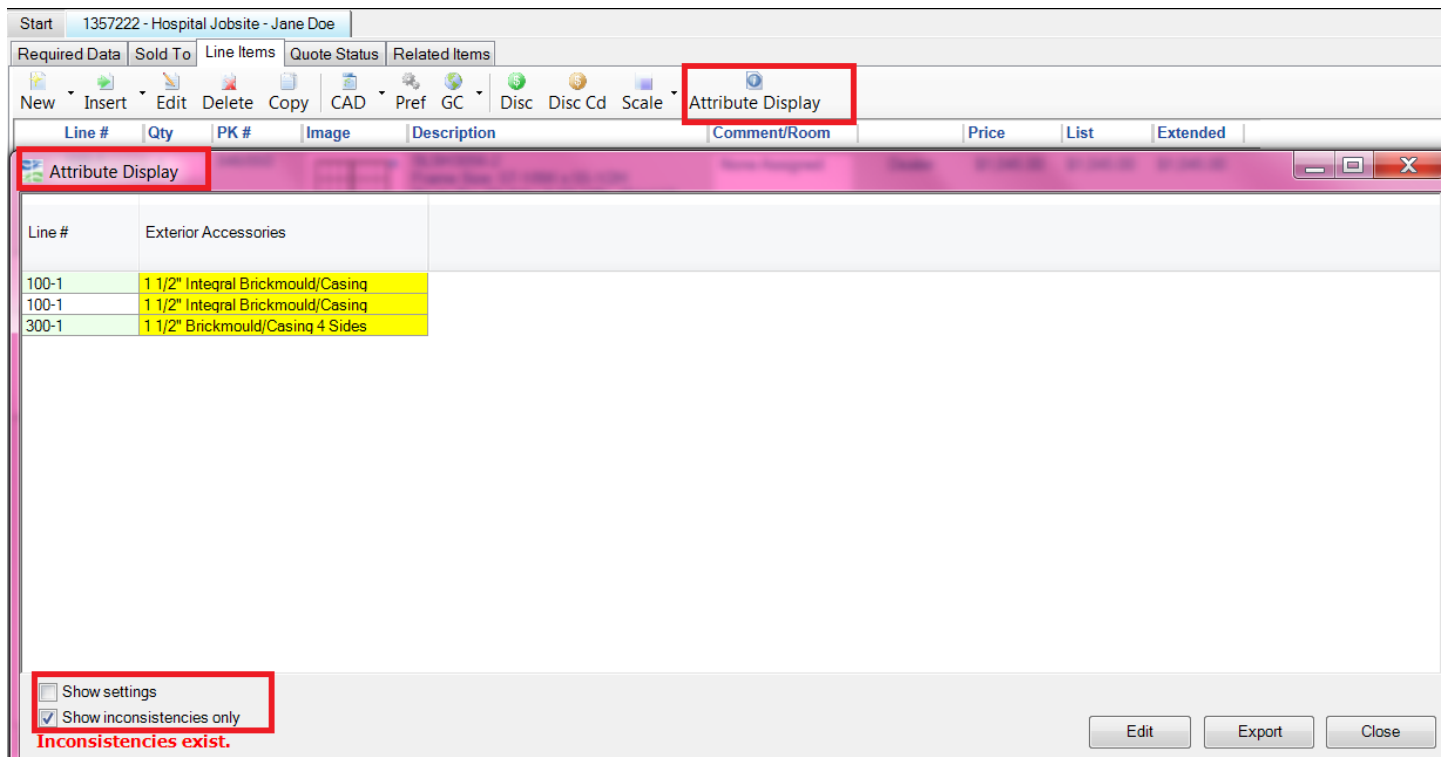
GC: This button will allow you to make Global Changes to a quote that you can apply to all line items (check "Apply to all") or click on the specific line items (more details below)

Disc: this button will open a window that will show the list price for a line item

Disc Cd: this button will open a window that will show the discount code & description for a specific series (click on the line item that you want to see this code)

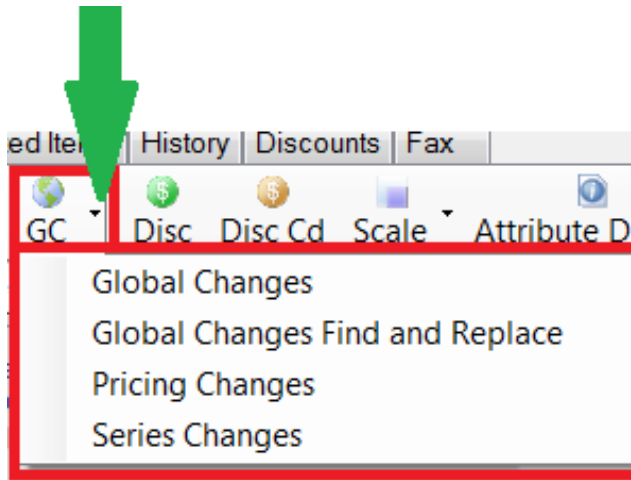
Scale: this will allow you to produce/save a scaled drawing of a line item or copy it to a clipboard to paste in another program.

Attribute Button: this allows you to see the feature regarded as a characteristic of each line item and the default will show any inconsistencies.



➤ **GLOBAL CHANGES:**

The pull down menu arrow next to GC will give you FOUR different options of global changes that you can make:

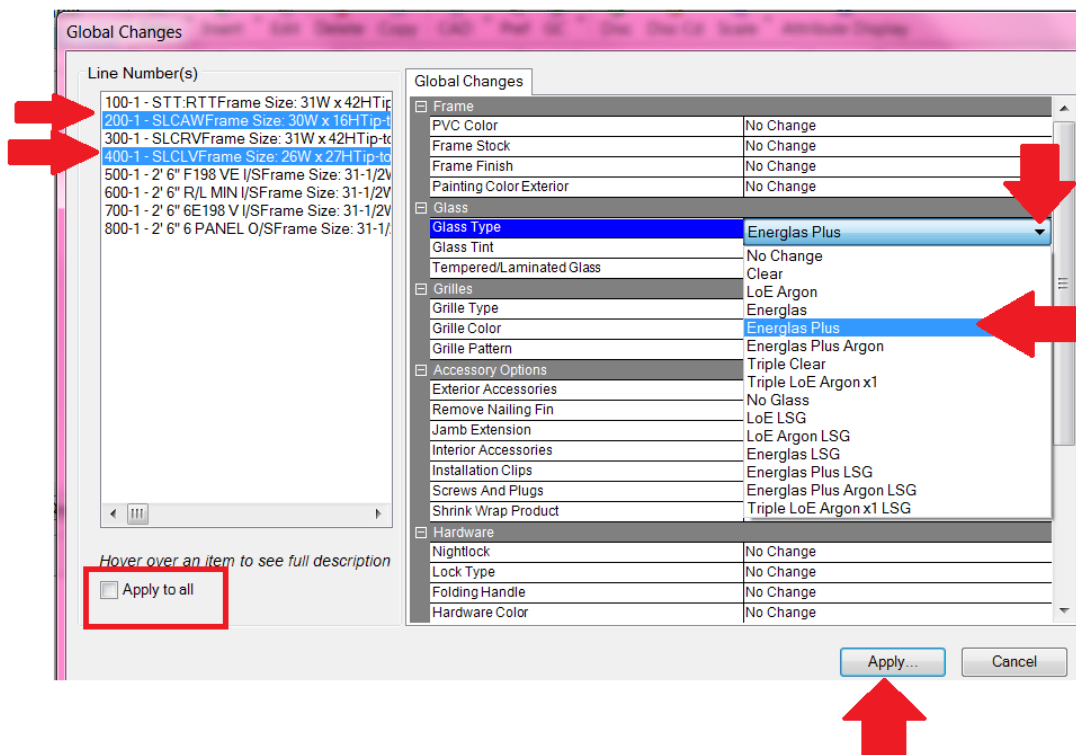


Global Changes: this will allow you to change an option on either specific lines or on the entire order (same as clicking on the GC button itself)

Global Changes Find & Replace: this will allow you to find specific options within line items and replace it with another option for all line items that have this option.

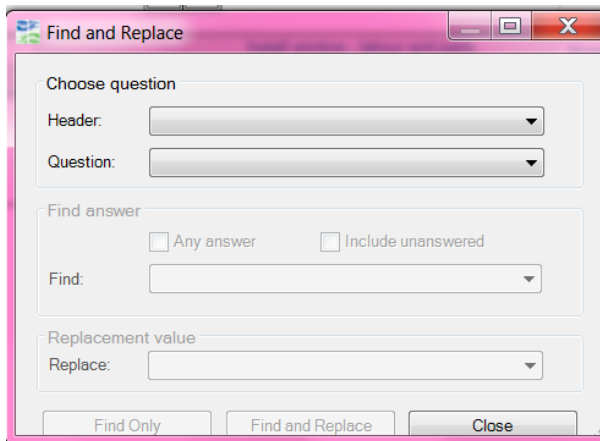
Pricing Changes: This will allow you to change the mark-up on either specific lines or the entire order.

Series changes: this will allow you to change the series on either specific lines or on the entire order.



If you wanted to select lines 200 & 400 to have different glass then you would click on line 200 and push your CTRL button on your key board and click 400 as well so that they were both highlighted and then make your change selection (i.e. Energlass Plus for Glass type) and then click APPLY.

➤ Global Changes Find and Replace:

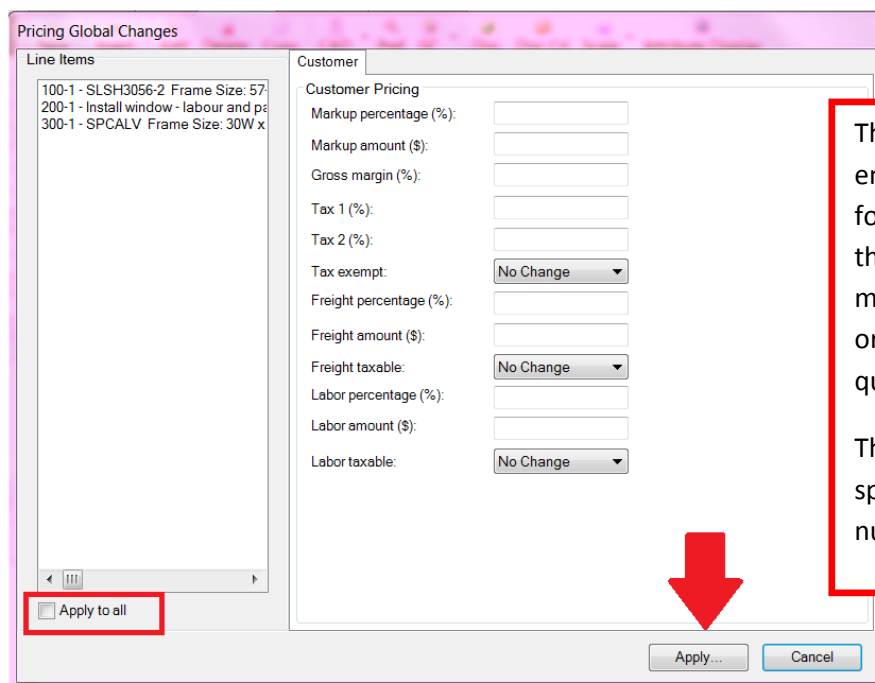


The 'Find and Replace' dialog box has a title bar with standard window controls. It contains three main sections: 'Choose question' with 'Header' and 'Question' dropdowns; 'Find answer' with checkboxes for 'Any answer' and 'Include unanswered', and a 'Find:' dropdown; and 'Replacement value' with a 'Replace:' dropdown. At the bottom are three buttons: 'Find Only', 'Find and Replace', and 'Close'.

Select from the drop down menu in each of the following: **Header**, **Question**, **Find**, **Replace** and then select **FIND ONLY** or **FIND and REPLACE** or **CLOSE** to get out of this window

➤ Pricing Global Change (three ways to change pricing):

1. Go through the GC button and Pricing Global Change and this will change pricing for one or all items within the quote:



The 'Pricing Global Changes' dialog box has two tabs: 'Line Items' and 'Customer'. The 'Line Items' tab is active, showing a list of items with line numbers and descriptions. At the bottom left of this tab is a checkbox labeled 'Apply to all'. The 'Customer' tab contains a 'Customer Pricing' section with various input fields: Markup percentage (%), Markup amount (\$), Gross margin (%), Tax 1 (%), Tax 2 (%), Tax exempt (dropdown set to 'No Change'), Freight percentage (%), Freight amount (\$), Freight taxable (dropdown set to 'No Change'), Labor percentage (%), Labor amount (\$), and Labor taxable (dropdown set to 'No Change'). At the bottom right are 'Apply...' and 'Cancel' buttons. A large red arrow points from the 'Apply...' button to the text box on the right.

This information is typically already entered Preferences (see page 7-9 for various preferences) however, this is where you can change your markup, gross margin, taxes, freight or labour charges for that **specific** quote as a onetime change.

This can be applied for ALL LINES or a specific line if you click on the line number on the left.

- Another way to change your customer pricing is by clicking on CUSTOMER within a specific line and the following window will populate. This option is for ONE line only at one specific time as it does not save these changes at any other time:

The screenshot shows a 'Customer Custom Price' dialog box. The dialog box has a title bar 'Customer Custom Price'. It contains the following fields and controls:

- Gross margin (%): 16.67
- Markup (%): 20
- Markup amount (\$): 0
- Freight (%): 0
- Freight amount (\$): 0
- Freight tax: No (dropdown)
- Labor (%): 0
- Labor amount (\$): 0
- Labor tax: No (dropdown)
- Tax 1 (%): 0
- Tax 2 (%): 0
- Tax exempt: No (dropdown)
- Total Cost: 209
- Buttons: Accept, Cancel

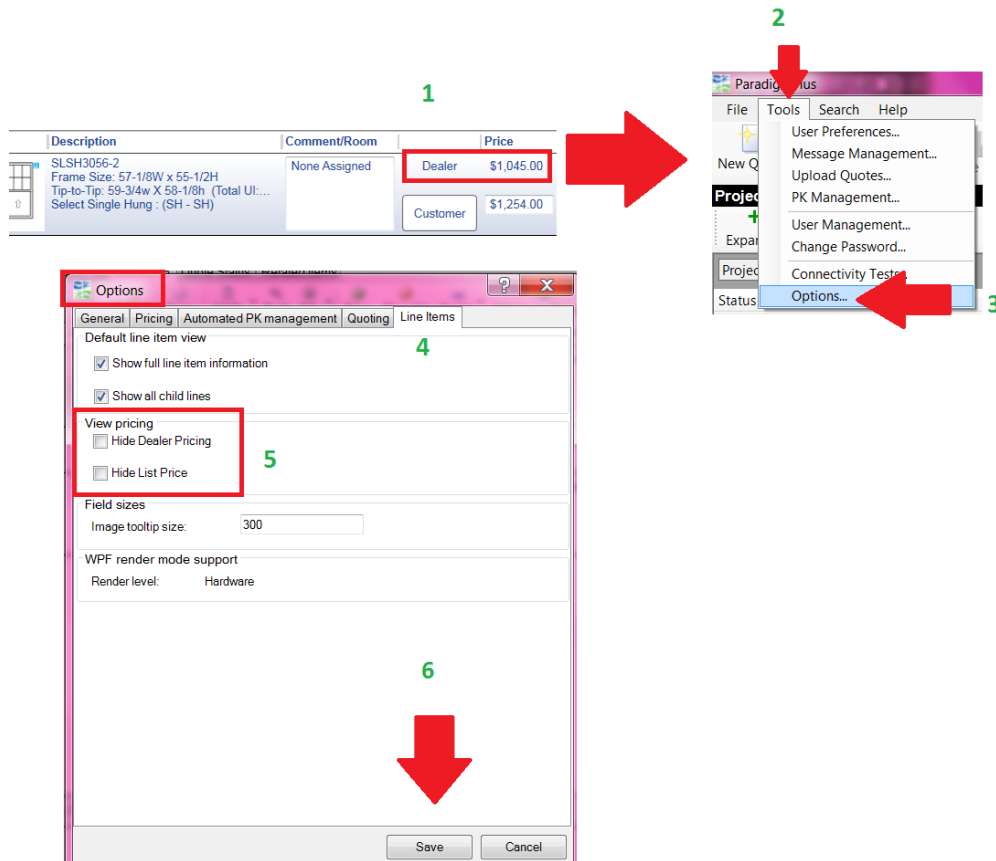
NOTE: If you wanted to offer a discount price on this product you can simply put in the dollar amount or reduce the markup amount.

Click accept to make changes to this line



- Lastly the final way to change the price of a line item is to simply click on the customer price section and enter in the new price. When you are finished hit ENTER on your keyboard to accept the change:

	Price	List	Extended
Manufacturer	\$875.00	\$875.00	\$875.00
Dealer	\$280.00	\$875.00	\$280.00
Customer	\$270.00	\$875.00	\$270.00

➤ **HIDE THE DEALER PRICE (from your customer):**

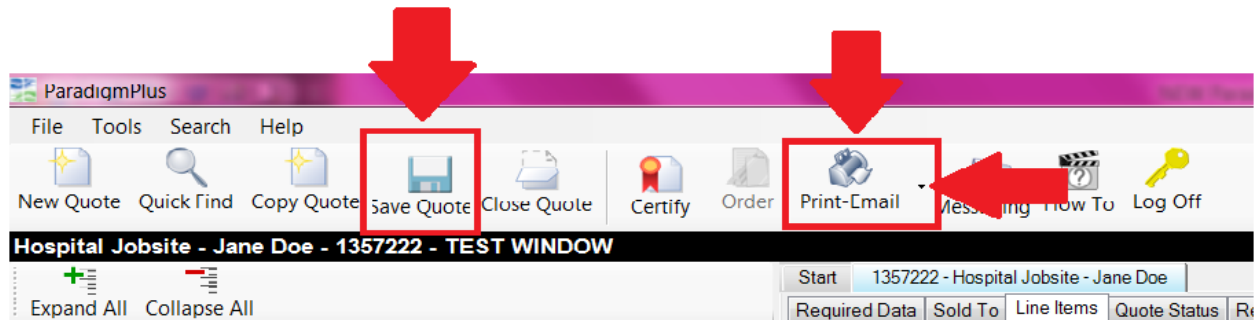


1. Dealer pricing shown on the list of items...**need to close out the quote (all opened quotes)**
2. Go to **Tools**
3. Click on **Options**
4. Click on **Line Items** when Options window populates
5. View pricing section: click on the **Hide Dealer Pricing**
6. Click **SAVE** and then reopen quote to see results

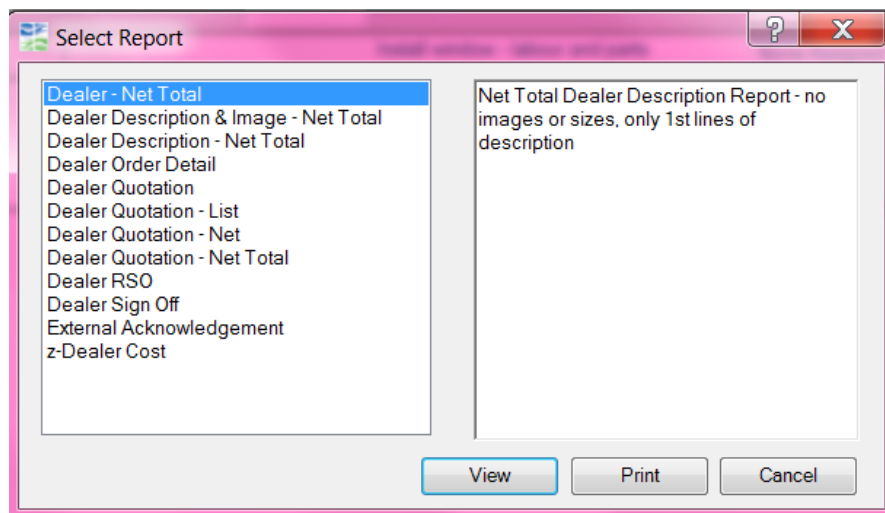
Image	Description	Comment/Room		Price	Extended
	SLSH3056-2 Frame Size: 57-1/8W x 55-1/2H Tip-to-Tip: 59-3/4w X 58-1/8h (Total Ul:.... Select Single Hung : (SH - SH)	None Assigned	Customer	\$1,254.00	\$1,254.00
	Install window - labour and parts	None Assigned	Customer	\$480.00	\$480.00
	SPCALV Frame Size: 30W x 30H Tip-to-Tip: 32-5/8w X 32-5/8h (Total Ul:.... Supreme Casement / Awning (2010) : (LV)	None Assigned	Customer	\$664.80	\$664.80

➤ **SAVE & PRINT QUOTE:**

Once you have finished your quote you will want to SAVE your quote before printing so that the system will generate a quote number. Once that is generated then you can click on Print/Email and it will be printed out for you:



The drop down menu arrow lets you select either print or email as your TWO options. Here are your options of print out documents that you can select from:



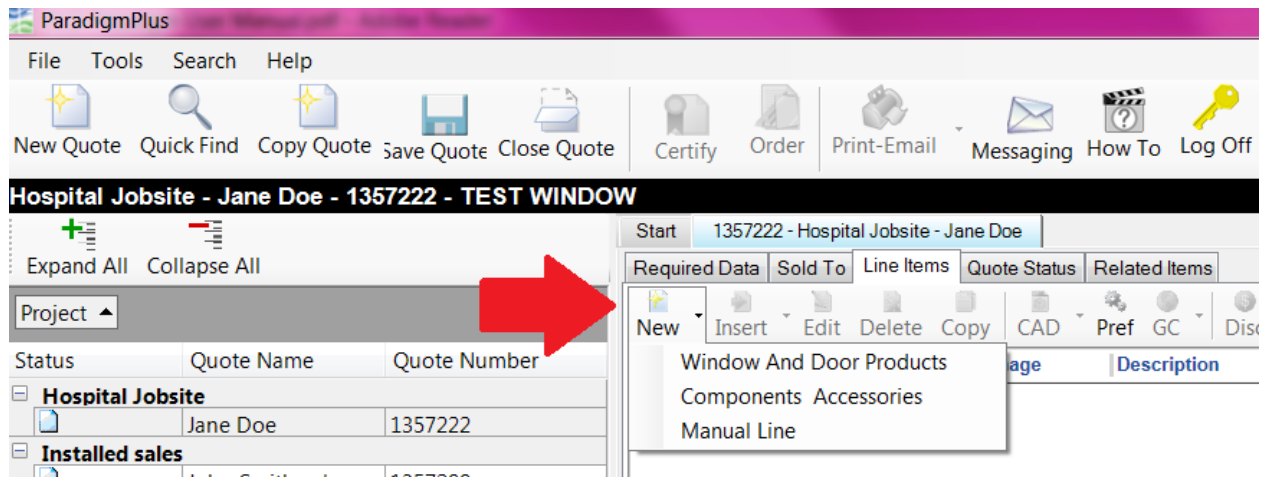
Each report will show an explanation of what you will be printing on the right hand side. **TIP:** you can VIEW the report first to see a preview prior to printing.

Dealer Sign Off: used whenever there are any of the following: a product warning outside of manufacturing limits, cut down doors, anytime there is a drawing involved (ie: bay/bow windows), etc. Typically your CSR will send this out to you if you have not provided before processing the order.

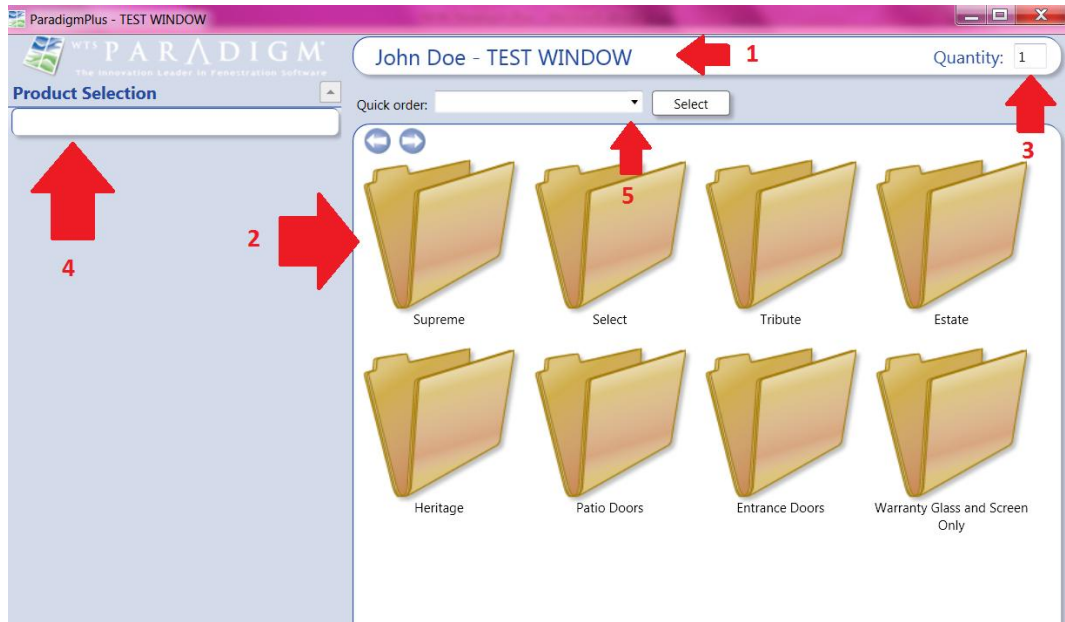
➤ **ENTERING LINE ITEMS (within a window quote)**

NOTE: Set preferences to that specific quote then click on “Pref” button to set up product knowledge preferences. Your pricing and disclaimer is likely already done with user preference so it applies to all quotes (see page 9 for details/reference).

- To begin entering items on a quote you must be under the “Line Items” tab.
- Click on NEW button (if you select the “arrow button” which is the drop down menu of the NEW button”) then you would need to select Window And Door Products



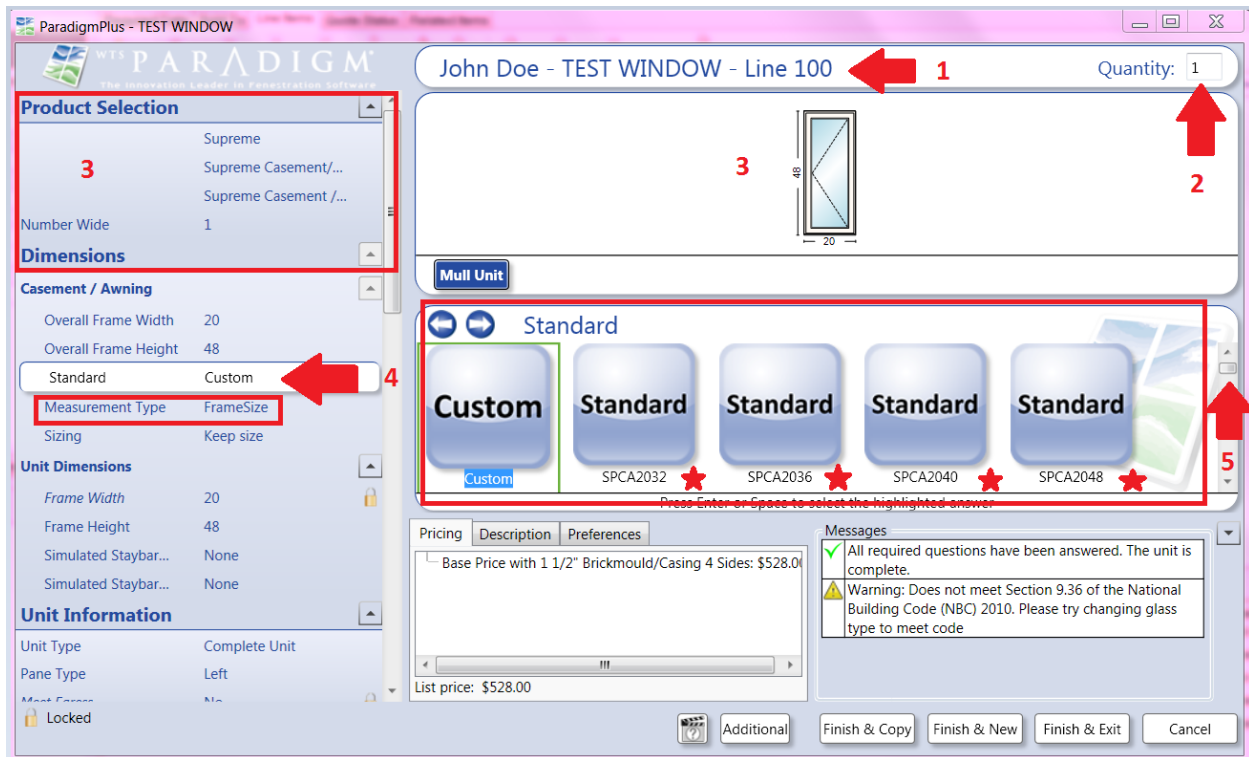
The following window then populates and the following **FIVE** areas are important to understand:



1. The Quote Name and your client number information (store information) are listed in this area.
2. These are the Window and Door product folders (simply click onto the folder for your selection).
3. This is the quantity you would enter for the product you need (this can also be changed later in the quote in a few areas if need be).
4. This area shows what selection you have chosen as you go into each folder/sub folders.
5. This can be used if you know exactly the profile and **standard size windows** you want to order (this will be an area to use once you have good product knowledge of our profile line abbreviations and standard sizes).

- To get started with a window quote select one of the profiles and then the style of window your customer is looking to buy.

This example is a Supreme Casement window that is 20x48 frame size with a few notes to mention:



1. This recaps your Quote Name and line number within the quote.
2. This field shows the quantity you are ordering – it automatically defaults to quantity of 1 so you can make the change in quantity in this area by clicking in the box and entering number.
3. This recaps what you have made for your product selection with a view of your product next to it.
4. This field will automatically default to custom **FRAME** sizing however if you click on this field then you can view and select our standard sizes as well
5. To view all our standard sizes you would click and drag the scroll button down or you can click on the arrow button (right underneath the number 5 displayed above)

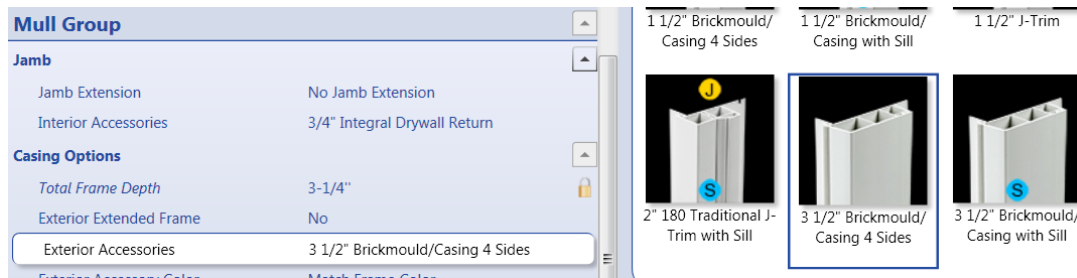


These are some examples of our standard sizes of windows...scroll down to view the rest of them as they are typically better priced than custom sizing.

➤ TIP TO TIP BRICKMOULD MEASUREMENTS:

When using Paradigm, the automatic default for Measurement Type is **FRAME size** so if you need to enter the measurement for **tip to tip brickmould** then you need to **first** ensure that you are selecting your BM exterior casing **before** entering in any measurements.

For example if needing 3.5" BM casing at 30"x35" tip to tip then you must select your exterior accessories **BEFORE** your sizing and then click on Measurement type to BrickMould:



I put in the measurement into the overall FRAME width **first** then selected the BM **as an example** to show how the BM frame measurements changed...you can still make the change by clicking on the BM overall frame width and height.

Dimensions	
Casement / Awning	
Overall Frame Width	30
Overall Frame Height	35
Standard	Custom
BrickMould Overall Frame Width	36.625
BrickMould Overall Frame Height	41.625
Measurement Type	BrickMould
Sizing	Keep size

VS

Dimensions	
Casement / Awning	
Overall Frame Width	23.375
Overall Frame Height	28.375
Standard	Custom
BrickMould Overall Frame Width	30
BrickMould Overall Frame Height	35
Measurement Type	BrickMould
Sizing	Keep size

TIP: It is good practice to select BM measurement type, select your Brickmould option and LASTLY enter your overall BM measurements in the appropriate fields

- **Measurements** are always listed in decimal format when looking at the Product Selection (left hand side of screen) however the **picture** of the product on the right will show the fraction format. You can enter in fraction formats within the fields if that is easier and it will automatically convert to decimal format once you accept that measurement (see example below).

← →

Overall Frame Width

36 5/8

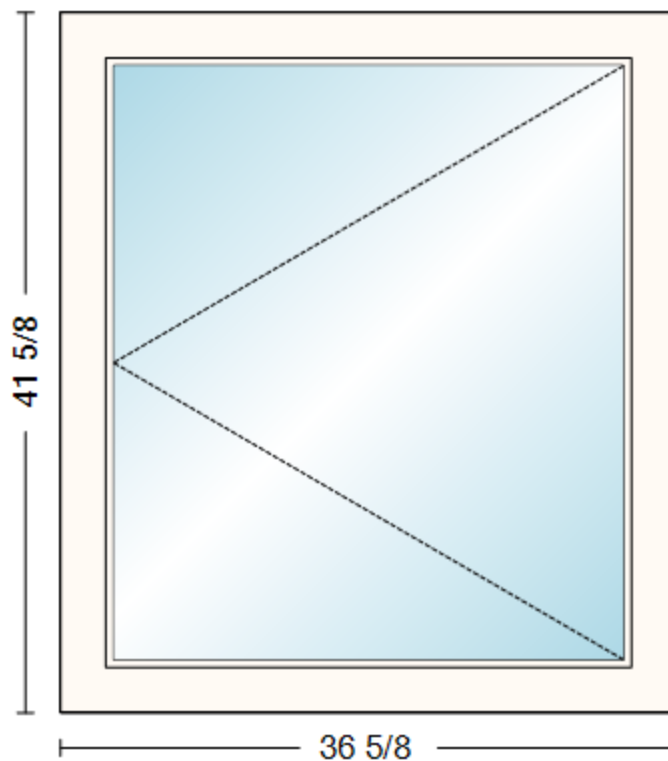
Accept Restore

Dimensions

Casement

Overall Frame Width	36.625
Overall Frame Height	41.625
Standard	Custom

Picture on the right as explained above:



➤ CASEMENT WINDOWS:

The following information is then available to build for this casement window. These are changeable options and you simply need to click on the appropriate field and make your selection:

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Unit Information

Unit Type	Complete Unit
Pane Type	Left
Passive House Certified(Requires approval)	No
Meet Egress	CDN Egress 15"W/15"H

Unit information: details for what you need: unit type for complete unit or parts of that specific window; pane type (left, right, awning, etc)

Frame

PVC Color	White
Painting Color Exterior	Not Painted
Painting Color Interior	Not Painted

Frame: details on the frame with the color of the PVC color and or painting the interior/exterior frame.

Hardware

Crank and Lock Color	White
Egress Hardware	Yes
Override Egress Hardware	No
Sash Restrictor	No
Stainless Steel Hardware	Yes
Nesting Operator Cover	None

Hardware: for CASEMENTS details of the crank & lock color for that specific window selected; sash restrictor options so windows only open a certain distance, nesting operator cover options

Screen

Screen	Screen
Screen Bar Color	White
Ship Screen Separately	Ship With Screen

Screen: options for screen bar color options to match with/without painted frame; all windows ship with screen automatically.

Glass

Glass Type	Clear
Glass Tint	No Tint
Tempered/Laminated Glass	Not Tempered

Glass: options to choose glass type: clear, LoE, LoE Argon, Energlass, etc. Tint or tempered glass options are found here also

➤ **GRILLES WITHIN PARADIGM:**

In the GRILLE section of the quote, you may choose from a wide variety of listed grille types and patterns:

Grilles	
Grille Type	3/4" Georgian
Grille Color	White
Grille Paint Color	Not Painted
Grille Pattern	Rectangular
Grille Division Type	Typical
Number Wide	2
Number High	2

Grille Type: this is where you can select your type of grilles you want inside the window; each profile and style of window will show what is available for grille type.

Grille Pattern: this is where you select your pattern for the grilles

Grille Division Type: this automatically selects **TYPICAL** which is what Paradigm will select for # of blocks wide & high according to window size.

➤ **GRILLE TYPE:**

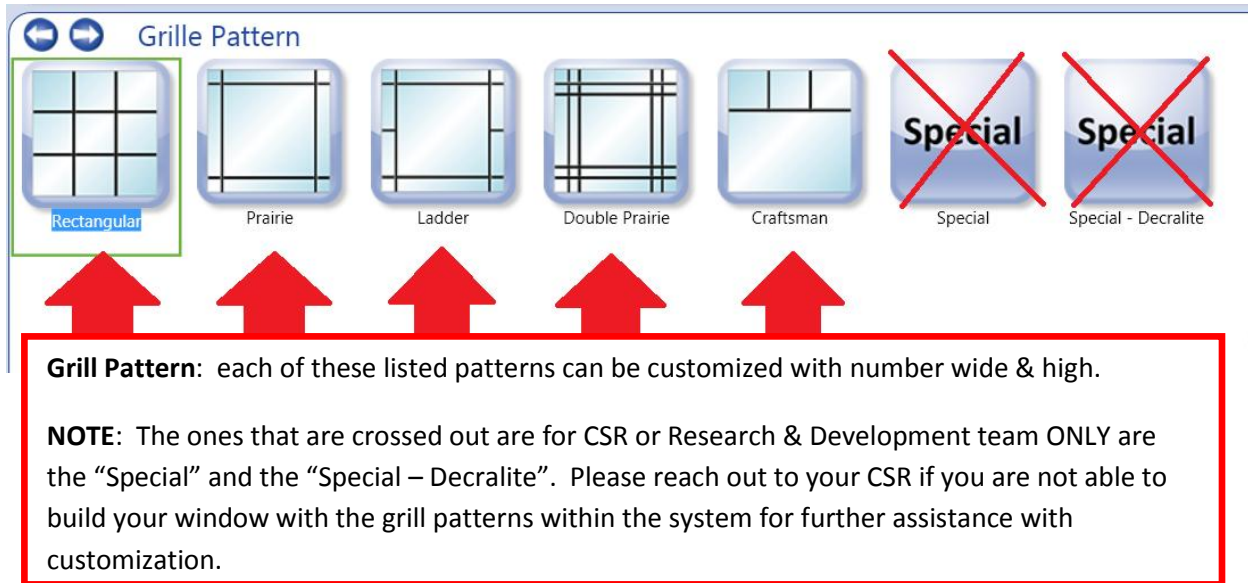
Each profile of window and style of window will provide you with the grille type that you can choose from by simply clicking onto the Grille Type field and they would display showing what options are available:



NOTE: if you are trying to change the grille pattern when the window has more than **ONE UNIT** (meaning a dash 2 or combo unit) you need to click on each unit that you want to change or customize the grilles and repeat for each unit.

➤ Grille Pattern:

These are the standard grille patterns that are available to use as Typical pattern for the window size or you may CUSTOMIZE the standard width & height of grille blocks:



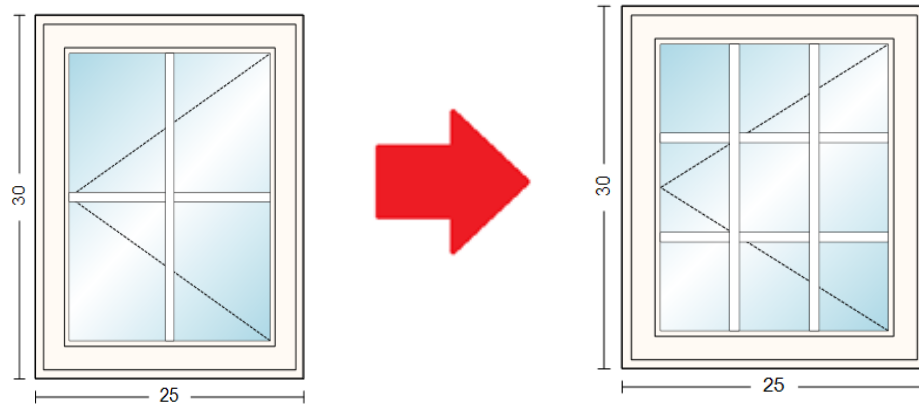
➤ Grille Division Type:

There are 3 options for selection:



1. Typical – the system will select the “typical” number of blocks for this size of window.
2. Custom – you can customize the number of blocks you want width and height.
3. Custom Specify – this would be used if you were trying to use Daylight Opening measurements, specific grilles for windows to match doors, or to retrieve measurements of grilles for matching purposes (there is an up-charge for this option so if you only need it for measurement purposes and NOT setting the blocks at specific measurements, ensure that you change back to custom).

This is an example of a customer that wants a 3x3 for rectangular grille pattern and the typical size/patter is 2x2 for this size window. In this case you would select CUSTOM and enter the 2x2 as width & height...you can see differences here below that suits your customer's needs.



A few examples of when you would use **custom specify**:

- To try and match the same (or similar) block size for small and large size windows with rectangular patterns (not normally able to get exact sizing but close measurements)
- Match the same craftsman grille so that the horizontal line matches with all windows that are lined up on the same side of building with different size windows
- Lining up grilles for units next to or above the one you are building so that they are all aligned properly regardless of the size of the window.

➤ **PAINTED GRILLES:**

For any painted products, the Grilles will automatically match your frame paint:

Frame	
PVC Color	White
Painting Color Exterior	Forest Green - V-RB6005
Painting Color Interior	Not Painted
Hardware	
Crank and Lock Color	White
Egress Hardware	Yes
Sash Restrictor	No
Stainless Steel Hardware	Yes
Nesting Operator Cover	None
Screen	
Screen	Screen
Screen Bar Color	White
Ship Screen Separately	Ship With Screen
Glass	
Glass Type	LoE Argon
Glass Tint	No Tint
Tempered/Laminated Glass	Not Tempered
Grilles	
Grille Type	3/4" Georgian
Grille Color	White
Grille Paint Color	Match Frame Paint
Grille Pattern	Rectangular
Grille Division Type	Custom
Number Wide	3
Number High	3

Painting Color Exterior: Forest Green is selected for exterior with interior not painted

NOTE: Screen bar color - if the screen bar is visual from the outside, the screen bar color would default to the exterior & interior color of the PVC frame...this is a time to BEST check with your CSR for confirmation if you are unsure as it depends on the window profile series.

Grille Paint Color: the system defaults the grilles to match frame paint so in this example Forest Green exterior and not painted interior will be the grille color. If you do NOT want to match frame paint then select NOT PAINTED and they will remain white on both sides.

➤ **Grilles for vertical sliders (SH/DH WINDOWS)**

Grilles	
Grille Type	3/4" Georgian
Grille Color	White
Grille Paint Color	Not Painted
Grille Pattern	Rectangular
Upper Grille Division Type	Typical
Bring Vertical Bars Through	Yes
Upper Number Wide	3
Bring Horizontal Bars Through	Yes
Upper Number High	2

For windows that have top and bottom sashes then you can also customize your grilles to be on the top only, bottom only, top and bottom or customize the pattern as well...simply click on the Upper Grille Division Type and select CUSTOM.

Upper Grille Division Type

Typical

Typical

Custom

Custom

None

None

Custom Specify

Custom Specify

Custom Specify: This would be used if you were trying to use Daylight Openings; specific grilles for windows to match doors, get measurements of grilles for matching purposes.

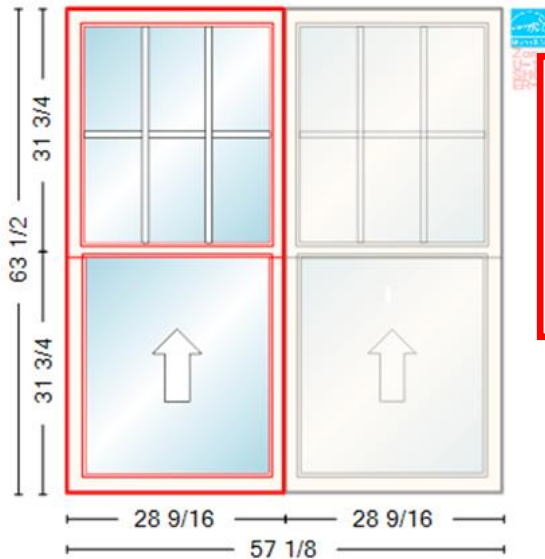
➔

Grilles	
Grille Type	3/4" Georgian
Grille Color	White
Grille Paint Color	Not Painted
Grille Pattern	Rectangular
Upper Grille Division Type	Answers Differ
Unit 1 Upper Grille Division Type	Custom
Unit 1 Lower Grille Division Type	Typical
Unit 2 Upper Grille Division Type	Custom
Unit 2 Lower Grille Division Type	Typical
Bring Vertical Bars Through	Yes
Upper Number Wide	3
Bring Horizontal Bars Through	Yes
Upper Number High	2
Unit 1 Upper Number High	2

Unit 1 Lower Grille Division Type: select NONE if no grilles wanted on the bottom sashes

Unit 2 Lower Grille Division Type: select NONE if no grilles wanted on the bottom sashes.

Vertical OR Horizontal Bars Through: used when you have upper and lower sashes or side by side windows so the grilles line up...select yes for these times.



When a unit is selected to make any changes, the window is highlighted in red to indicate which unit you are making the change on and you **MUST** also select the second unit if you want them both the same.

The remainder of the window options are listed below (use the scrolling bar on the side to get to this area):

Vertical Mull	
Type	FactoryMull
Width	T-Mullion
Mull Group	
Jamb	
Jamb Extension	No Jamb Extension
Interior Accessories	3/4" Integral Drywall Return
Casing Options	
Total Frame Depth	3-1/4"
Exterior Extended Frame	No
Exterior Accessories	1 1/2" Integral Brickmould/Casing
Exterior Accessory Color	Match Frame Color
Remove Nailing Fin	Leave Nailing Fin
Installation Prep	
Installation Clips	No
Screws And Plugs	No
General	
Comment/Room	None Assigned
Locked	

Vertical Mull: Typically the system will default accurately with these options...or you may get a "soft or hard warning" if the mullions need to be changed/reinforced.

Jamb: these options can be changed by clicking on the appropriate field

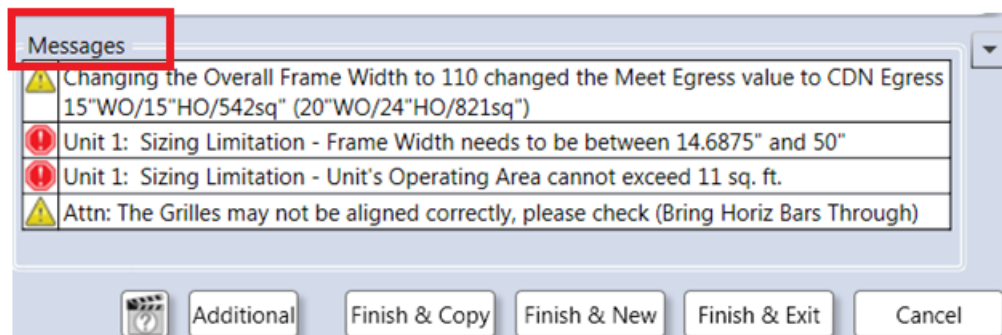
Casing options: these options can be changed also by clicking in the appropriate field and making your selection (**NOTE:** if using a BM tip to tip measurement, the **exterior accessories** option must be selected **FIRST** before putting in your measurements).

Installation Prep: these options can be changed as well; **NOTE:** All Single Casement and Double Hung's over 60" in height to have screws and plugs as the default. Installation clips will be optional. **BUT** one or the other must be picked.

➤ **MESSAGES:**

Warnings are shown in the lower right hand corner under MESSAGES...see examples below. When you save the line item to your quote you will see a pop up window showing these warning messages. If any of these messages show up, please make note or make changes appropriately – or reach out to your CSR directly if you are uncertain of how to make changes.

- Yellow caution sign is “soft” warning (brought forward to bring to your attention and to double check if change is required)
- Red stop sign is “restricted” (this will not allow you to save this item without a mandatory change).



➤ **Comments for CSR:**

Any comment you want to bring to **CSR attention** needs to be in this section **ONLY** and you can include anything at all – any known inconsistencies to avoid a clarification call or email, delivery requests, etc. (do not use the comment/room section in the line items this is for your reference only) .

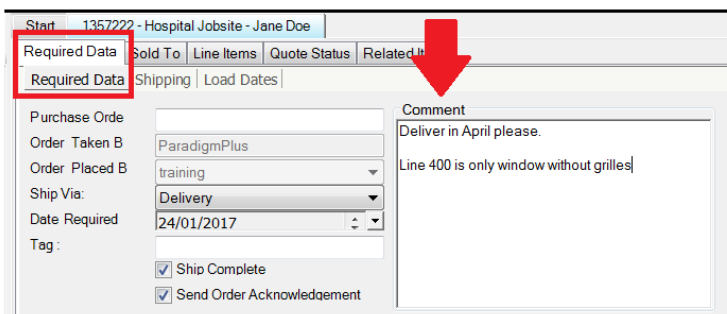




Image	Description	Comment/Room
	SLSH3056-2 Frame Size: 57-1/8W x 55-1/2H Tip-to-Tip: 59-3/4w X 58-1/8h (Total UI:...) Select Single Hung : (SH - SH)	None Assigned
	Install window - labour and parts	None Assigned
	SPCALV Frame Size: 30W x 30H Tip-to-Tip: 32-5/8w X 32-5/8h (Total UI:...) Supreme Casement / Awning (2010) : (LV)	None Assigned

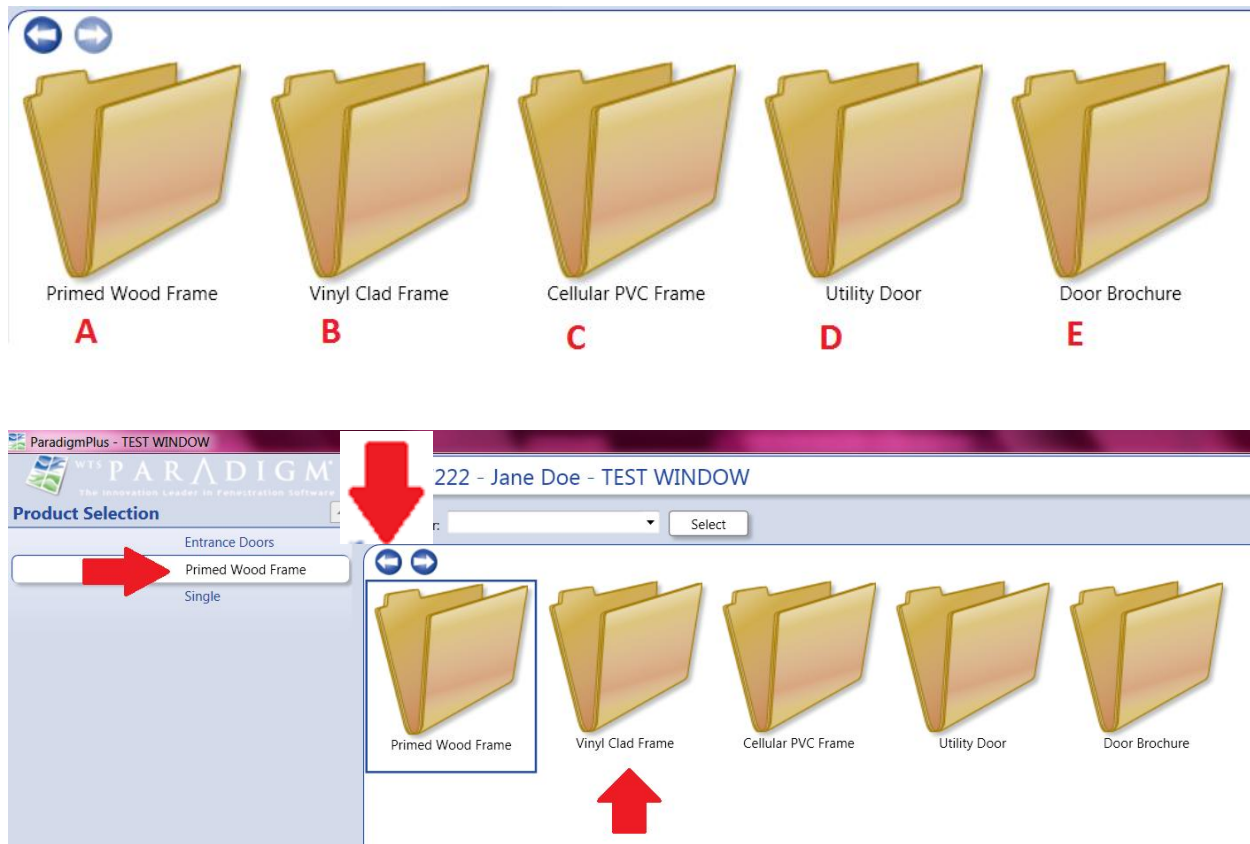
➤ **ENTERING AN ENTRANCE DOOR QUOTE:**

The screenshot displays the Paradigm software interface. At the top, a menu bar includes 'New', 'Insert', 'Edit', 'Delete', 'Copy', 'CAD', 'Pref', 'GC', 'Disc', 'Disc Cd', 'Scale', and 'Attribute Display'. Below this is a table with columns: 'Line #', 'Qty', 'PK #', 'Image', 'Description', and 'Com'. The first row shows '00-1', '1', '846/850', an image of a window, and 'SLSH3056-2'. The second row shows '00-1', '1', and 'Install window - labour and parts'. Below the table is a 'Product Selection' section with a search bar and a 'Quick order:' dropdown. To the right, there are four folder icons labeled 'Estate', 'Heritage', 'Entrance Doors', and 'Warranty Glass and Screen Only'. The 'Entrance Doors' folder is highlighted with a red box. A red arrow points from the 'NEW' button to the 'Entrance Doors' folder.

Click on NEW to enter another window/door and a new window will appear with your options.

Select Entrance Doors to make your selection by clicking on the folder and you will notice that it will show up in the product selection field above.

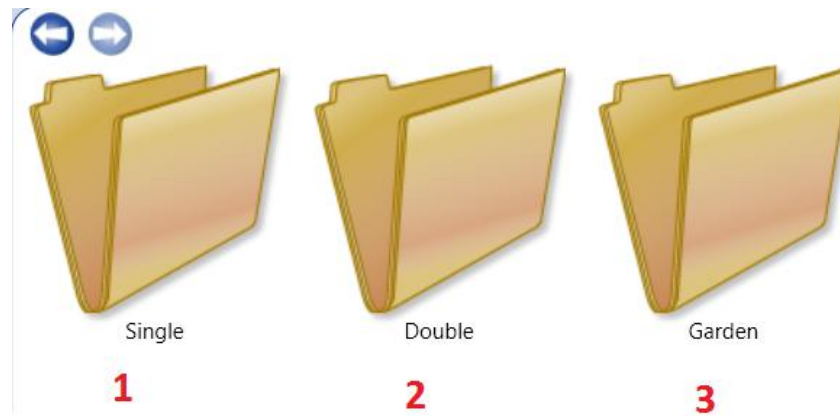
When you select Entrance Doors the following 5 options are then available and you would click on the appropriate folder as per your customer's request:



Under **Product Selection** this will ALWAYS show what you have been selecting along the way and you can always **click on any of these fields** to make the necessary corrections. So if you want **Vinyl Clad Frame** then click on Primed Wood Frame and make the correction.

NOTE: You can ALSO click on the back button and it will go back to previous steps and in some cases you need to hit it multiple times to get to the proper field. It is easier to simply click onto the field in this case and when you do the field is highlighted in white box and then you make then choose Vinyl Clad Frame folder.

When selecting either **A)** Primed Wood, **B)** Vinyl Clad or **C)** Cellular PVC Frame you have 3 options to consider at this point:



Single door: one entrance door required – you can select sidelights or not after this selection (see below)

Double Door: If you want a wide opening without a post in the middle then you will have a floating astragal with flush bolts to lock in passive door.

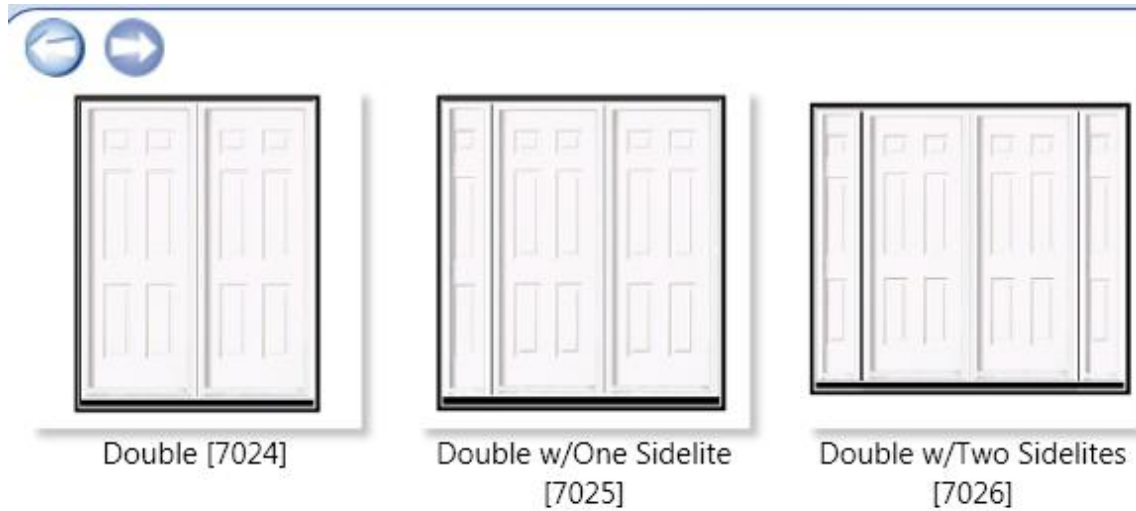
Garden Door has a fixed unit on one side that can NOT open except for a venting secondary door.

Here are the options available for each of these folders:

1. Single Door options:



2. Double Door options:

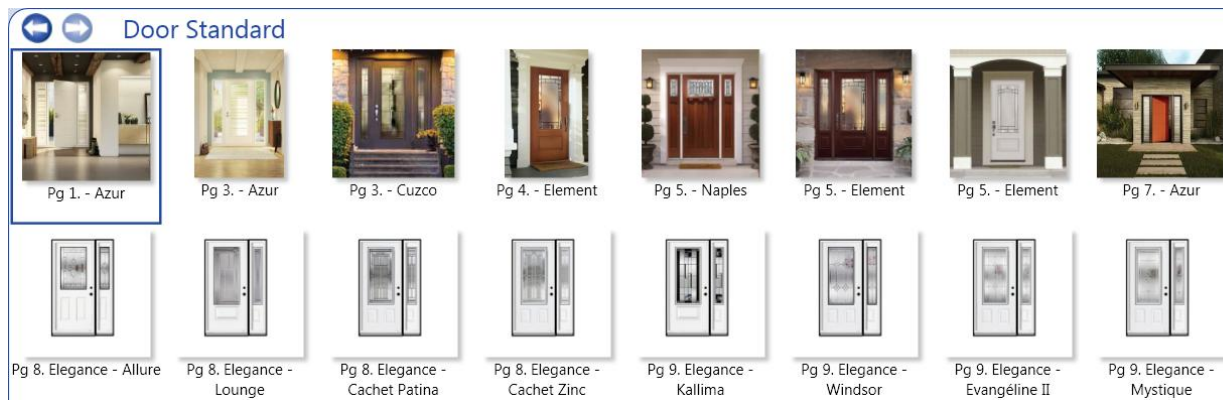


3. Garden Door options:



D) Utility Doors are simply 4 5/8" primed wood framed doors

E) Brochure Doors is used as a quick find to our latest brochure of our doors



When entering an entrance door, the software will calculate the width & height (shown by star below) based on the options selected (shown in the box below the star). You will notice also that there is not a lock symbol in this area so that means it can be entered information.

ParadigmPlus - TEST WINDOW

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Product Selection

Entrance Doors
Vinyl Clad Frame
Single
Vinyl Clad Single Entry w/One Sidelite

Number Wide 2

Dimensions

Single w/One Sidelite

Overall Frame Width	49
Overall Frame Height	82.1875
Brickmould Overall Width	51.4375
Brickmould Overall Height	83.625

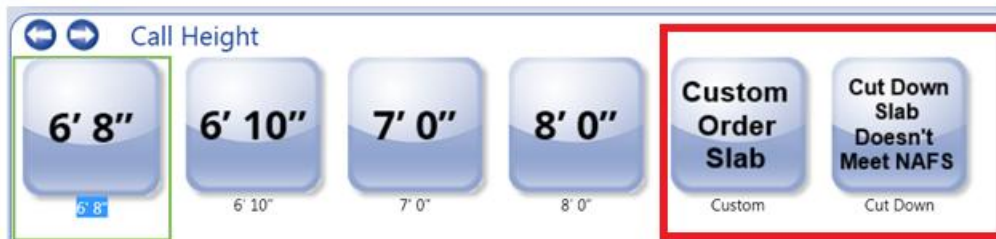
All Unit Dimensions

Call Width	Answers Differ
Unit 1 Call Width	14"
Unit 2 Call Width	2' 8"
Call Height	6' 8"
Frame Width	Answers Differ
Unit 1 Frame Width	15.4375
Unit 2 Frame Width	33.5625
Frame Height	82.1875
Actual Slab Height	79
Actual Slab Width	Answers Differ
Unit 1 Actual Slab Width	13.875
Unit 2 Actual Slab Width	31.75

Items that have the LOCK symbol (shown in the box next to the scrolling bar) reflects that these fields are not changeable and for viewing only.

➤ CUSTOM VS CUT DOWN DOOR SLAB:

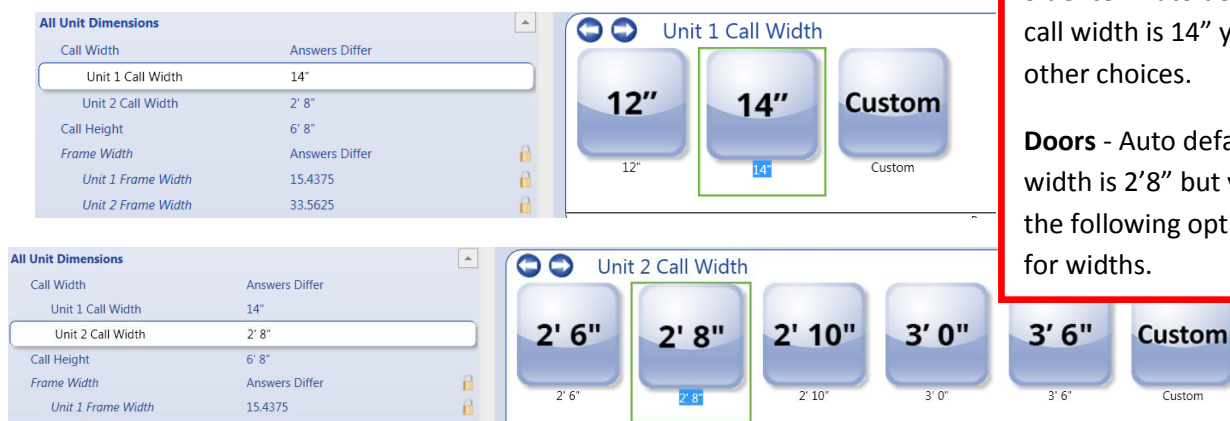
A few important things to consider for the **call height** of a door when determining whether a Custom OR Cut Down Slab is the best option for your customer:



Custom slab – this is a **non-stock door that is special ordered** with a high performance sweep, custom made with lock block set where you need it so that the lockset (& deadbolt if required) will be routed into wood, and it is NAFS rated. This is totally a customized door within your specific requirements therefore more expensive choice.

Cut Down slab – this is using a **stocked door** that we have on hand that we simply cut the bottom of the door by the measurement that you need and replace the high performance sweep with a boxed sweep. The lockset is NOT moved so you have limited room for your lockset/deadbolt to be routed in wood. The lockset measurement will automatically be moved down by the amount of the cut down measurement (i.e. 77 cut down door would be 2 inches shorter so the lockset would be 2" lower as the **automatic default measurement**). If you need to change this height measurement for lockset of deadbolt location then please reach out to your customer service rep for assistance as each door profile is slightly different or make a note into the comment section of the REQUIRED DATA tab.

- **Call Height** – you can select from the standard height doors (see above)
- **Call width** – you can select from the standard width sidelites AND door OR customize by selecting the appropriate field and making your selection:








Sidelite - Auto default for call width is 14" you have 2 other choices.

Doors - Auto default for call width is 2'8" but you have the following options listed for widths.

➤ Details of door:

When you finish picking your sizes of your door you then need to scroll down and see the following options for **UNIT INFORMATION**:

Unit Information	
Unit Type	Complete Unit
Pane Type	Left Hand Door
Swing	In Swing
Door Frame Type	Vinyl Clad with Primed Jambs
Energy Rating	Zone=3 U=0.7 SHGC=0.01 ER=24...
Frame	
Frame Depth	4 5/8"
PVC Color	White
Weatherstrip Color	White (Compression)

Unit Type				
 Complete Unit 1	 Frame Only 2	 Glass Only 3	 Slab Only 4	 Frame Accessories Only 5

Press Enter or Space to select the highlighted a

- **Unit Type** – you have 5 options to consider:
 1. **Complete Unit** – the entire unit includes frame, slab, glass, frame accessories, etc. So complete each field accordingly by clicking onto the field to make your selection.
 2. **Frame Only** – ONLY the outside frame where the slab would be attached is selected. (See diagram on next page)
 3. **Glass only** – ONLY the glass kit for the slab is selected **which includes trim rings**, note: if you are replacing contemporary trim rings then please ensure that you select contemporary trim rings as YES (see next page for visual)
 4. **Slab only** – ONLY the slab is selected and no other parts of the door unit.
 5. **Frame accessories** – ONLY the BM would be selected where you would need to know the frame depth, size of the BM needed, whether you need an extended frame and nailing fin.
- **Pane Type** – selection option is left hand, right hand or fixed slab
- **Swing** – selection option is inswing or outswing
- **Door frame type** – auto defaults to your frame selection you made at the beginning. For vinyl clad frames you have two options: v/clad with primed jambs or double v/clad
- **Energy rating** – locked field but shows the zone as per your selection

➤ **UNIT TYPE OPTIONS:**

Frame Only Options: Used ONLY if you need to reorder the frame.

Glass Only Options: Used ONLY if you need to order the lite kit.

Unit Information

Unit Type	Frame Only
Shrink Wrap Product	No
Pane Type	Left Hand Door
Swing	In Swing
Door Frame Type	Vinyl Clad with Primed Jambs
Frame	
Frame Depth	4 5/8"
PVC Color	White
Weatherstrip Color	White (Compression)
Door Options	
Frame Latch Prep	Yes
Frame Deadbolt Prep	n/a
Slab Options	
Hinge Type	No Hinges
Mull Group	
Casing Options	
Exterior Extended Frame	No
Exterior Accessories	2" Vinyl Brickmould/Casing
Exterior Accessory Color	Match Frame Color
Sill Style	High Performance Sill
Sill Type	Composite Sill
Protective Film	No
Installation Prep	
Screws And Plugs	Yes
General	

Product Selection

Entrance Doors

Vinyl Clad Frame

Single

Vinyl Clad Single Entry Door

Number Wide 1

Dimensions

Single

Overall Frame Width 33.5

Overall Frame Height 82.1875

Brickmould Overall Width 36

Brickmould Overall Height 83.4375

Rotation Angle 0

Unit Dimensions

Call Height 6' 8"

Actual Slab Height 79

Unit Information

Unit Type Glass Only

Door Frame Type Vinyl Clad with Primed Jambs

Door Options

Door Glazing Families Traditional Lite Kits

Traditional Door Lite Kits 6E101 (6E170)

Mull Group

Casing Options

Exterior Extended Frame No

Sill Style High Performance Sill

Protective Film No

General

Comment/Room None Assigned

The key fields to ensure are correct are shown in arrows listed above so you simply need to click on the specified editable field and make the necessary changes.

For **GLASS ONLY** these are your Door Glazing Family options **which also come with your trim rings:**

Door Glazing Families

Traditional Lite Kits	Classic Lite Kits	Elegance Litekits	Novatech	Non-Stock Other	Masonite Barrington Fiberglass	Masonite
Traditional Lite Kits	Classic Lite Kits	Elegance Lite Kits	Non-Stock Novatech Lite Kits	Non-Stock Other Lite Kits	Masonite - Barrington Lite Kits	Non-Stock Specialty Lite Kits

Slab Only Option: Used ONLY when you need to reorder the slab.

Unit Information	
Unit Type	Slab Only
Delayed Slab	No
Shrink Wrap Product	No
Pane Type	Left Hand Door
Swing	In Swing
Door Frame Type	Double Vinyl Clad
Frame	
Weatherstrip Color	White (Compression)
Door Options	
Door Configurator	-
Door Glazing Families	No Door Lite Glazing
Fire Rated Slab	No Fire Rated Slab
Door Slab	6 Panel
Door Cutout	No Door Cutout
Lockset Prep	Lockset Prep W 2 3/4" Backset
Deadbolt Prep	No Deadbolt
Panic Prep	No Panic Prep
Closer Prep	No
Door Viewer	None
Hinge Prep	Standard
Slab Options	
Slab Type	Steel Slab
Slab Color Exterior	Prefinished White
Slab Color Interior	Prefinished White
Sweep Color	No Sweep
Hinge Type	No Hinges
Double Door Astragal	No
Mull Group	
Casing Options	
Exterior Extended Frame	No
Remove Nailing Fin	Remove Nailing Fin
Sill Style	High Performance Sill
Protective Film	No
General	
Comment/Room	Side Door
Locked	

Frame Accessories Option:
Used only when you need to reorder the exterior accessories.

Unit Information	
Unit Type	Frame Accessories Only
Shrink Wrap Product	No
Pane Type	Right Hand Door
Swing	In Swing
Door Frame Design	New Frame
Frame	
Frame Depth	4 5/8"
Paint Complete Exterior of Door	No
Painting Color Exterior	Not Painted
Staining Color	No Stain
Weatherstrip Color	White (Compression)
Mull Group	
Casing Options	
Exterior Extended Frame	No
Exterior Accessories	1 1/2" Brickmould/Casing
Exterior Accessory Color	Match Frame Color
Remove Nailing Fin	Remove Nailing Fin
Sill Style	High Performance Sill
Protective Film	No
General	
Comment/Room	Side Door
Locked	

➤ **PAINTED TRIM RINGS:**

One area to focus on for lite kits is whether they need to be matched to a painted slab OR frame AND if they are contemporary trim rings (if they are contemporary trim rings then you must click on the contemporary trim ring selection – see below).

NOTE: If they are to be BOTH painted contemporary trim rings then please ensure that you attention and to ensure that they are the contemporary trim rings.

Unit Information	
Unit Type	Glass Only
Door Frame Type	Vinyl Clad with Primed Jambs
Door Options	
Door Glazing Families	Elegance Lite Kits
Elegance Door Lite Kits	Kallima Patina 2248 10-229-057-010
Slab Options	
Trim Rings	Paint Custom Color
Trim Rings Custom Color	PE:??? PI:???
Contemporary Trim Rings	No
Mull Group	
Casing Options	
Exterior Extended Frame	No
Sill Style	High Performance Sill
Protective Film	No
General	

Slab options – TRIM RINGS:

Select the appropriate paint/stain option if required along with the customer color and if they are contemporary trim rings then select **YES**

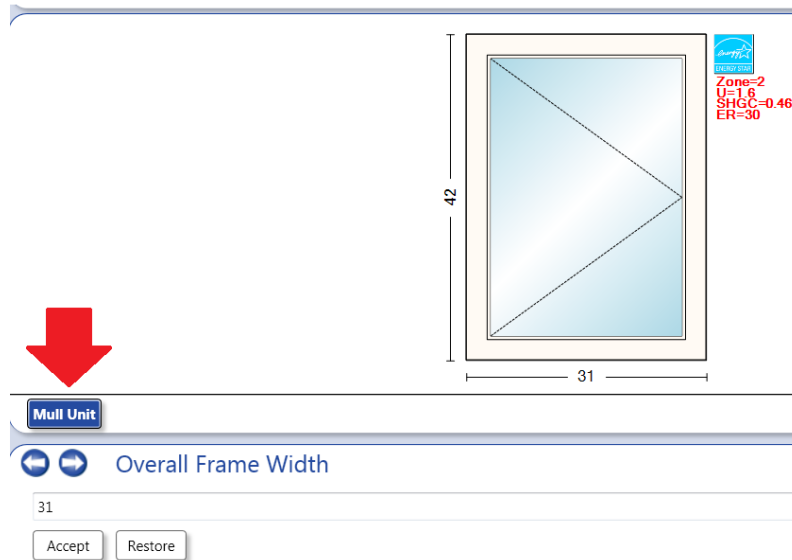
NOTE: PE:??? PI:??? – this means **P**aint **E**xterior: ??? **P**aint **I**nterior: ??? so please ensure that you use the abbreviations when entering.

For example: PE: KC BLACK V-RB7005 PI: NO paint - would mean black on exterior of trim rings and prefinished white on interior of slab if the slab was this way.

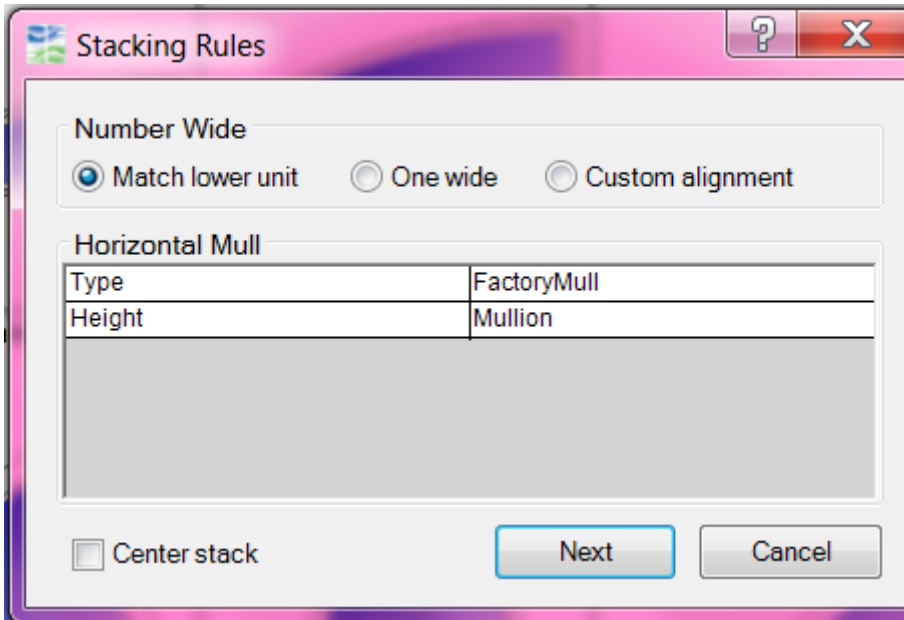
Required Data	Sold To	Line Items	Quote Status	Related Items	History	Discounts	Fax			
<table border="1"> <tr> <td>Required Data</td> <td>Shipping</td> <td>Load Dates</td> </tr> </table>								Required Data	Shipping	Load Dates
Required Data	Shipping	Load Dates								
Purchase Order							Comment NOTE: Line 100 lite kit has contemporary trim rings that need to be painted			
Order Taken B	mlanthierg									
Order Placed B	test									
Ship Via:	Delivery									
Date Required	25/08/2016									

➤ **ADDING A TRANSOM TO A WINDOW/DOOR:**

1. Once you have your window/door built the way you want, you can then go to the “diagram” portion of the software and click on MULL UNIT:



2. You would then select the appropriate shape to be mulled above the unit (same folder profile (transom), polygon (angled shapes), radius (rounded shapes).
3. Then a window will populate with some stacking rules:



There are **THREE** different options to choose from for the “**number wide**”:

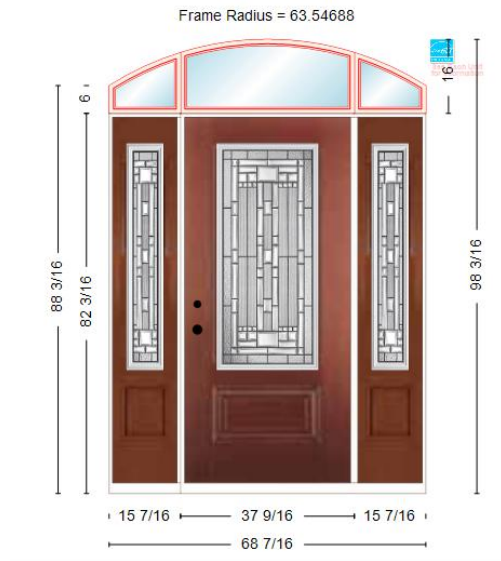
MATCH LOWER UNIT: this will make the unit that is being added the same number wide as the bottom unit. (If a dash 3 then adding dash 3 transom)

ONE WIDE: this will make the window being added a dash 1 over the entire unit. (if bottom unit 86” wide with dash 3 then transom/shape will be 86” wide as 1 unit)

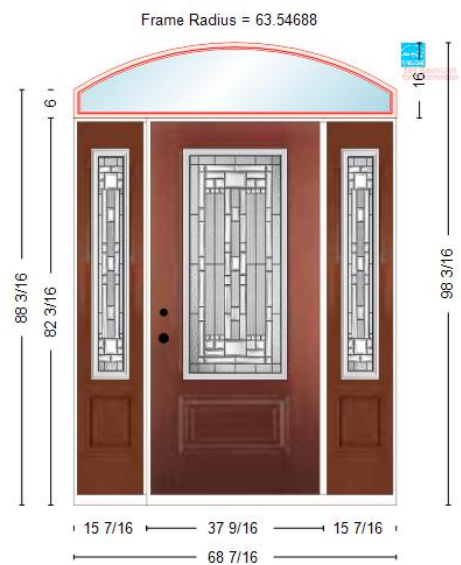
CUSTOM ALIGNMENT: this will allow you to pick where the window being added will start AND STOP.

Examples of each number wide:

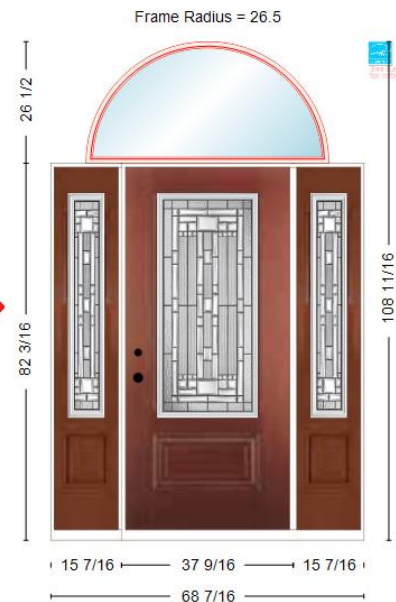
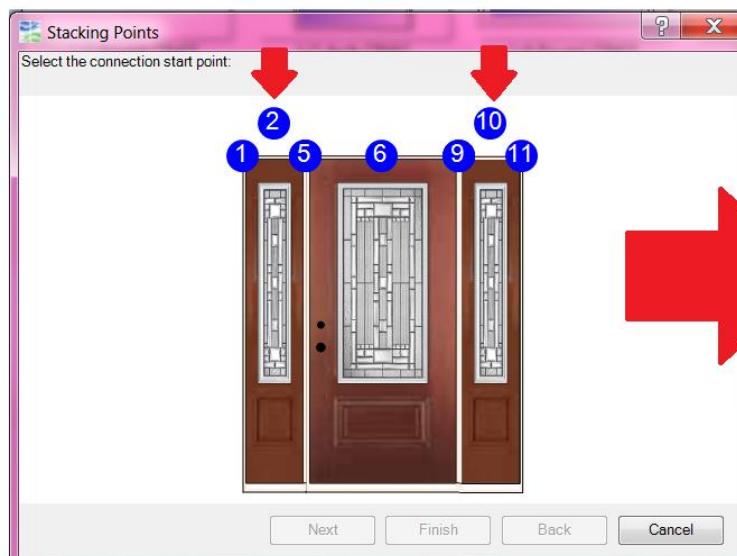
a. Match lower unit



b. One Wide unit:



c. Custom Alignment (stacking point) used 2 & 10 in this example:



Once you have mulled this unit above the window/door then you would treat that unit as a single unit and you can change the following fields that do NOT have a lock symbol next to it:

Product Selection	
Entrance Doors	
Door Shapes	
Door 1/2 Round	
Dimensions	
1/2 Round	
Overall Frame Width	53
Overall Frame Height	26.5
Selected Unit Dimensions	
Frame Width	53
Frame Height (CHANGE ON...)	26.5
Frame Radius (CHANGE ON...)	26.5
Frame Radius Point Offset (CHANGE...)	0
Unit Information	
Pane Type	Narrow Profile Picture Window
Transom Options	
Transom Glazing Families	Non-Lite Kit Glazing
Glass	
Glass Type	Clear
Glass Tint	No Tint
Tempered/Laminated Glass	Not Tempered
Grilles	
Grille Type	None
Grille Pattern	None

Locked

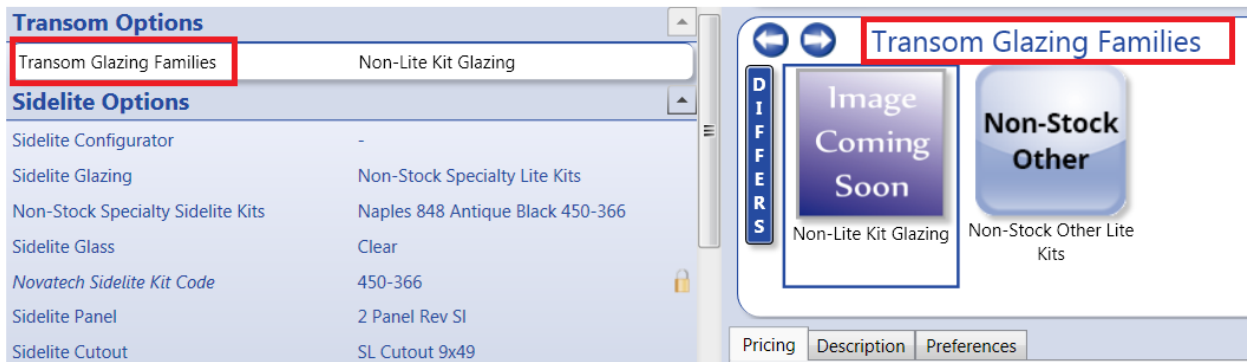
Unit Information: Some shapes will allow different pane types and some are fixed as only one option.

Transom Options: this is used if you would like a specific lite kit within the transom. Non Lite Kit Glazing is your traditional selection if you are not matching with non stock other lite kits.

Glass: select glass type and tint

Grilles: select type and pattern

Once you make your selections for your transom, there is one note to mention when using Non Stock Other Lite Kits:

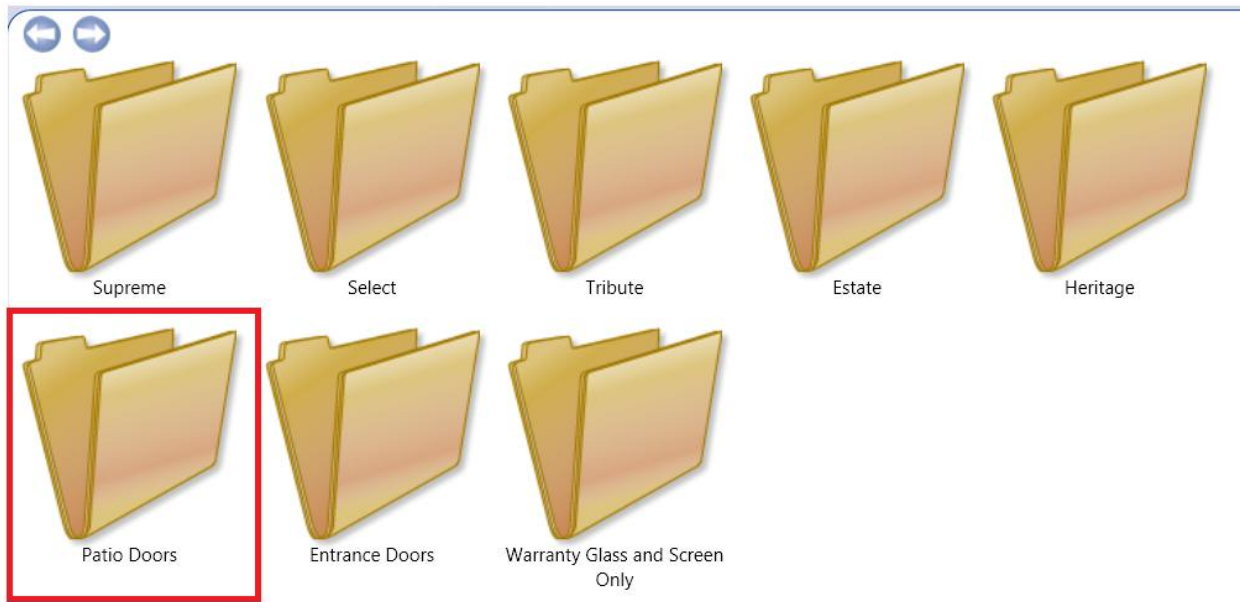


NOTE: As soon as you pick NON STOCK OTHER LITE KITS typically the up charge is astronomical pricing so you will need to reach out to your CSR to adjust the pricing (see below) and you can note what you like in the Special Transom Lite Kit field OR in the required data section so that we know what you want into the transom as the lite kit.



➤ **ENTERING A QUOTE FOR A PATIO DOOR (PD):**

1. Click NEW
2. Click Patio Doors



3. Choose the appropriate profile for Patio Doors (Select, Estate and Imagine Patio Doors have the patio door option AND/OR Transom for selections. The R series profiles you simply have the patio door that will come up and the Supreme Tilt & Turn Door has 4 options: Supreme Tilt & Turn Door, Transom, Supreme Tilt & Turn French Door, Supreme Tilt & Slide Door).



4. If any of the above mentioned patio doors are selected with the option for either for patio door or transom, you can choose a number of patio door panels for the patio door. (NOTE: Select, Estate and Imagine has a maximum of 3 panels where one of

which is the actual patio door panel. The Supreme Tilt & Turn Door give a maximum of 4 panels as each unit is treated as a panel regardless if it is a tilt & turn OR a tilt and slide unit)

Select PD features (all vinyl frame construction):

- White or Tan vinyl profile frames available and can be painted
- Internal jamb extensions available
- Shapes and transoms available
- Internal Blinds on ONLY the 6' Select Patio Door size
- 5 7/8" mechanically fastened vinyl frame
- External & internal accessory grooves to accept all frame accessories.
- Equal operating and fixed sash sight lines.

Estate PD features (combines structure of a wood frame with vinyl to brighten inside of home):

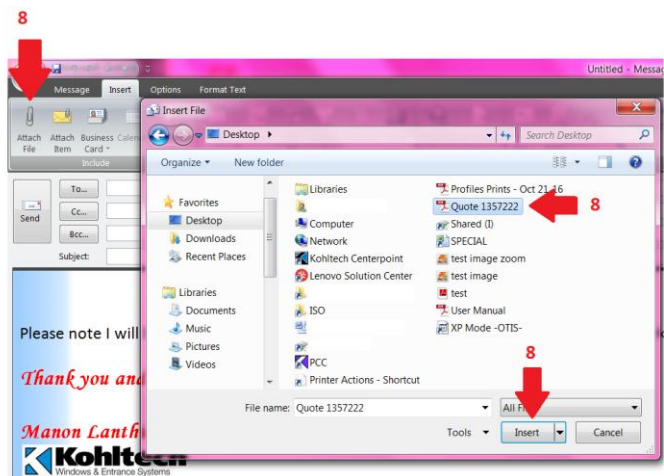
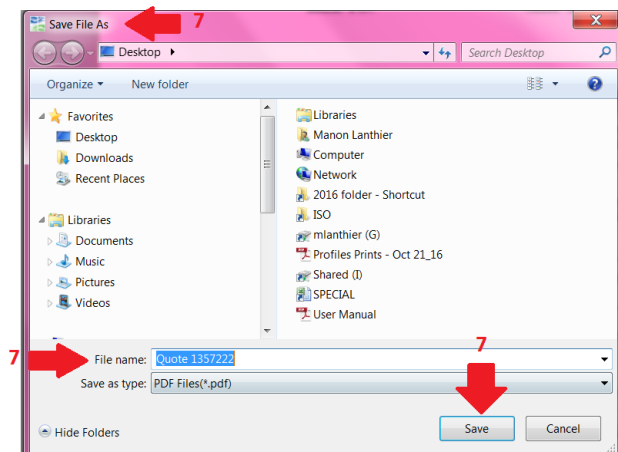
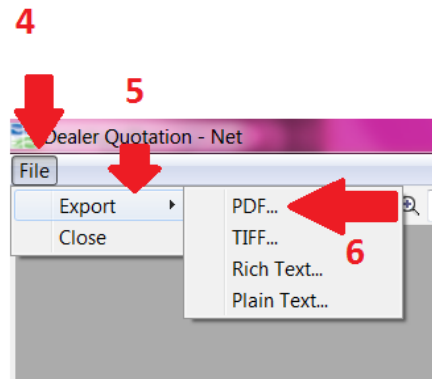
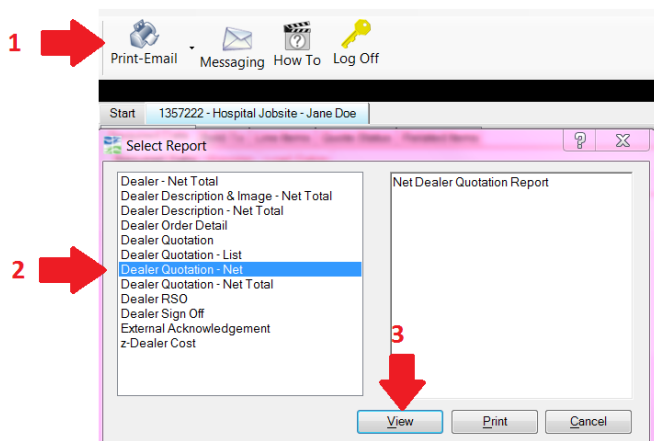
- White or Tan vinyl profile frames available and can be painted
- Internal jamb extensions available
- Shapes and transoms available
- Internal Blinds on ONLY the 6' Select Patio Door size
- 5 7/8" mechanically fastened vinyl frame
- External & internal accessory grooves to accept all frame accessories.
- Equal operating and fixed sash sight lines.

Supreme Tilt & Turn Doors features (functionality and flexibility given):

- Upright position: functions as traditional inswing Patio Door providing easy entrance and exit
- Tilt position: the entire door gently tilts inward to provide air circulation & cross ventilation without compromising security.
- All BM options available
- Can be painted
- Internal jamb extensions available
- Shapes & transoms available
- Internal Blinds on available standard size lite kits
- Thickest exterior walls we offer in a fully reinforced configuration for maximum structural performance.
- Single handle operates both functions
- Available in single, double or French.

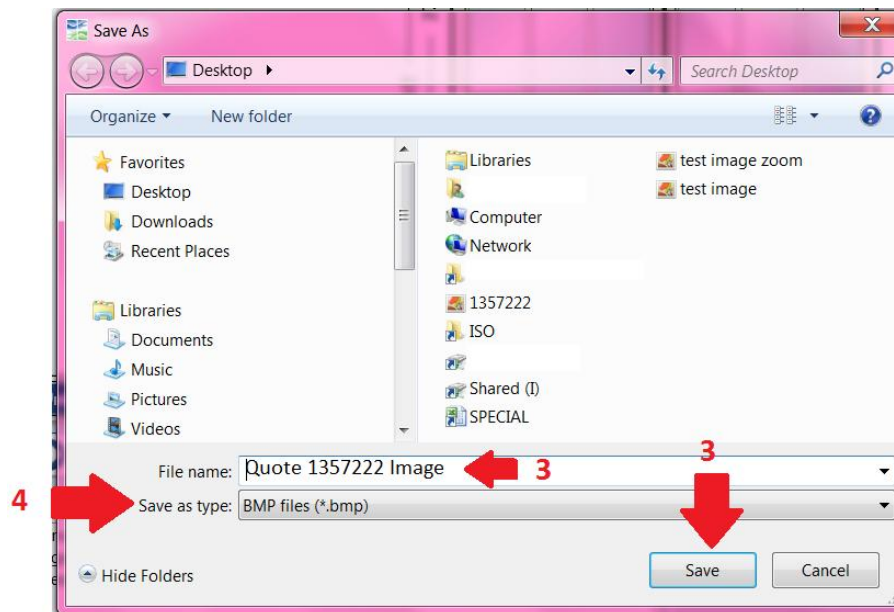
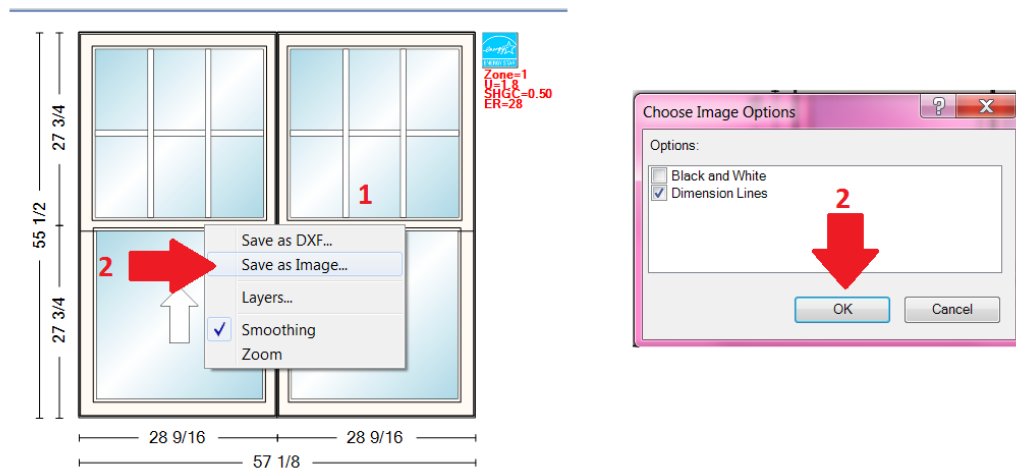
➤ **HOW TO CREATE A FILE TO EMAIL THE QUOTE:**

1. Click on the **Print/Email** button
2. Select the correct Quote form you want to email.
3. Click on **View**
4. Once the print preview shows up then click on **File** in the top left corner of the screen.
5. Select **Export**
6. You will then want to create a PDF file.
7. When the next screen appears select where you want to save the file, name it and click **SAVE**.
8. Once the file has been created you can send it as a file attachment in the email.



➤ **How to create a picture file of a window:**

1. If you have completed entering the window, double click on the line to “Edit” it.
2. Right click on the picture of the window and select “Save As Image” then another window populates to “Choose Image Options” make selection then click “OK”.
3. When the next screen appears, select where you want to save the file, name it and “Save”.
4. You will want to save the file as BMP.
5. Once the file has been created you can send it as a mail attachment or print it off for your customer.



➤ **GLOSSARY:**

Mullions

- **¼" Rein Mullion:** This mullion is used to provide extra structural support and is installed between the window frames. The software will allow ½" for each mullion by adjusting the size of the individual components to maintain the overall dimensions of the unit
- **Mullion:** This mullion is used to join individual windows together to have a multi-wide unit
- **T-Mullion:** This is the mullion used when the unit is a master-frame

Window Pane Types

Casement Windows swing outward on side or top hinge and operate with a crank handle:

- **Picture window:** Fixed windows that do not open. They are used to let in a lot of light and to take advantage of a view. Picture windows are often used in combination with operating units.
- **Awning:** Operating unit is hinged at the top swinging outward.
- **Fixed Sash:** Picture unit with a sash that is screwed into the frame
- **Left:** Operating unit hinged on the left (from the outside looking in)
- **Narrow Profile Picture Window:** Picture window with no sash and a narrower frame (less vinyl – more glass)
- **Right:** Operating unit hinged on the right (from the outside looking in)
- **Wide Profile Picture Window:** Picture window with no sash but a wider frame so that the sight light will match that of an operating unit
- **Combo unit:** 3 units of casement sashes (fixed or operating on each side of a larger picture window) mulled together to form a combo unit which is broken as ¼, ½, ¼ in overall width measurement
- **Bay/Bow:** a combination of casement windows that project outward from a building wall. A **bay window** has a fixed center window parallel to the wall flanked by two operating (or non-operating) windows usually at a angle of 45°. A **bow window** has more than 3 sections set at gentle angles (usually 10 °) that give a window a curved appearance (like a bow).

Double Hung Windows have both sashes that move and are controlled by a balancing mechanism so they do not fall when raised. The sash also tilts for ease of cleaning.

- **Fixed:** Picture window that matches the DH profile as one unit
- **Operating:** Double hung window with two operating sashes
- **Oriel:** an operating sash that is larger in height over a smaller operating DH sash

Single Hung Windows are known as vertical sliders in which the top pane of glass is fixed and the bottom sash moves. The sash also tilts for ease of cleaning.

- **Fixed:** Picture window that matches the SH profile as one unit
- **Operating:** Single hung window with a fixed sash over an operating sash
- **Oriel:** a fixed sash that is larger in height over smaller operating SH sash

Gliders are also known as horizontal gliders and have normally one removable sash.

- **Triple Glider:** Single glider with 2 operating sashes and a fixed unit in the center
- **Fixed:** picture window
- **Left glider:** single glider with the left sash operating (from the outside looking in)
- **Right glider:** single glider with the right sash operating (from the outside looking in)
- **Double gliders:** single glider with 2 operating sashes
- **Double glider fixed:** picture window of the DG profile.

Shaped Windows are geometric shaped windows that can be used alone or in combination with other windows to give a curved appearance to a building or simply add charm and character to a room.

- **Polygon shapes:** angled shapes such as: triangle, trapezoid, custom angle, pentagon, clip corner, double clip corner, octagon, hexagon, flat parallelogram and diamond
- **Radius shapes:** rounded/curved shapes such as: half round, half arch, ¼ round, ¼ arch, segmental, extended segmental, ¼ segmental, extended ¼ segmental, ellipse, extended ellipse, ¼ ellipse, ¼ extended ellipse, cathedral, extended cathedral, circle and oval
- **Narrow profile picture window:** This is the profile that we bend – ALL radius shapes will have this as well as the casement polygon shapes.
- **Wide Profile picture window:** This would select the profile that would match a casement window - it is only available on casement polygon shapes.
- **Supreme SH operating shapes:** a selection of SH extended radius and polygon shapes

Tilt & Turn Windows are a blend of the best features of traditional casement windows, picture and tilting designs to create an elegant and functionally simple window.

- **Turn only** (right or left): sash swings outward same a hinged door with a turn of a handle.
- **Tilt only** (right or left): sash swings outwards at the top hinge with a turn of the handle. This allows ventilation and offers total rain protection.
- **Tilt & Turn** (right or left): sash has both features mentioned above so it swings outward like an awning AND also swings outward like a hinged door with a simple turn of the handle (it doesn't do both simultaneously).
- **Hopper:** sash swings inwards at a bottom hinge. This is the reverse of an awning window that pivots at the bottom and opens inward. This allows ventilation but not the same rain protection as an awning.

Entrance Systems

Patio Doors – these can be traditional slide Patio Doors, OR Tilt and Turn French Doors OR Tilt and Slide doors (swings are mentioned from the outside looking in):

- **Estate PD** – wood strengthened vinyl frame with durability of vinyl to brighten the inside of your home all year long.
- **Select PD** – 4 sided vinyl exterior trim and virtually maintenance free.
 - **XO** – left hand active
 - **OX** – right hand active
 - **OXO** – three lite patio door: fixed panel, left operator, fixed panel
 - **XOX** – three lite patio door: left operator, fixed panel, right operator
 - **OXXO** – four lite patio door – fixed panel, left operator, right operator, fixed panel
 - **Sidelight** – a fixed panel in the PD profile selected
- **Supreme Tilt & Turn Door** – tilting functions to a traditional inswing and sliding patio doors. In a Tilt position, the entire door gently tilts inwards to provide air circulation and cross ventilation without compromising security. A single handle operates both the tilt and turn functions.
- **Supreme Tilt & Slide PD** – A single handle operates both the tilt and turn and slide functions and blends the best features of a window and door into one creative and distinctive entrance for your home.
- **Supreme Tilt & Turn French Door** – *Inswing* doors are offered as fixed, tilt/turn, tilt only or turn only and the astragal post is on the side that has turn ONLY. *Outswing* doors are offered as fixed or turn ONLY with astragal post normally on the handle with lockset side.

- **Supreme Tilt and turn Doors** can be in any of these combinations:
 - **LTT** - Left tilt & turn
 - **RTT** – Right tilt & turn
 - **LTO** - Left turn only
 - **RTO** – Right turn only
 - **LTILT** - Left tilt only
 - **RTILT** – Right tilt only
 - **SL** – sidelight – fixed panel of Supreme Tilt & Turn profile

Double Door – two door slabs where one side is operational and the second slab is known as the passive slab so that when they are both opened you have a wide opening without a post in the middle.

- **Astragal post** – a post that acts as a seal between two doors or between the door and the frame that provides protection for the locking device. They stick out past the outside edge of the door and cover the gap between the doors or the door and frame, depending on its application
- **Passive slab** – not the primary operating door but with flush bolts opened it will open to be a passive opening and is your floating astragal post.
- **Left hand door** – Left is operator and right is the passive slab
- **Right hand door** – left is operator and left is passive slab.
- **Sidelite** – a fixed panel to match the patio door
- **Transom** – a fixed unit that is attached to the top of the patio door

Garden Door – these are two door slabs where one side is operational and the second slab is a fixed slab or a vented slab unit.

- **LH** – left hand hinged on the jamb
- **LHA** – left hand active hinged on post
- **LHO** – left hand outswing
- **LHI** – left hand inswing
- **LHAO** –left hand active hinged on post with outswing door (means RHO/LHA)
- **RH** – right hand hinged on the jamb
- **RHA** – right hand hinged on the post
- **RHO** – right hand outswing
- **RHI** – right hand inswing
- **RHAO** – right hand active hinged on post with outswing door (means LHO/RHA)
- **Fixed panel** – a fixed panel to match an operating door

Utility Door – these are **primed wood frame** units with a 5 yr warranty primed slab in 2’8”, 2’10” and 3’0” doors only and come in either 4 5/8” frame depth with ONLY 2” Wood Brickmould casing OR plain frame options for external accessories.

Cellular PVC Doors – vinyl cladding on exterior and interior and is paint/stainable product; storm door friendly with 2” 180 traditional BM, 3.5 “ BM casing, 2.5” 180 traditional BM (both with or without J-trim); no rot frame.

Vinyl Cladding Doors – clear finger jointed Eastern White pine frame with vinyl cladding on the exterior; also available option as **double vinyl clad** where cladding is both on exterior and interior.

Wood Frame – clear finger jointed Eastern white pine with Polytex steel or fibreglass slabs but ONLY have 2” wood BM or plain frame option for exterior accessories.