





















How to create a new window layout while quoting.


From quotes → lines → add:

Click Product Image to Add →(Use type buttons to filter images)

 Picture-Pic	 Fixed-Fix	 22x9-LHH	 22x9-RHH	 6 Panel-LHH	 6 Panel-RHH	 Awning-Awning	 Casement-Left	 Casement-Right
 Double Hung-DHT	 Double Slider-DST	 Flush-LHH	 Flush-RHH	 Full-LHH	 Full-RHH	 Half Glass-LHH	 Half Glass-RHH	 Half Moon-LHH
 Half Moon-RHH	 Oval-LHH 3/4							

Top Entry Doors Miscellaneous Sliding Doors Sunroom
Top 20 Entry Doors Miscellaneous Sliding Door Sunroom

Windows
Awning Bay Bow Casement Double Hung Double Slider Fixed Shapes Angled Shapes Curved Single Hung Single Slider

 Create Product Cancel


use the “Create Product” button, which will only appear if your user-role has authority to create new products.

From the “Select Family...” popup, click on the button for the window family:

Select Family For New Product

Exterior Swing Door	Glass Units	Interior Door	Windows-PH
---------------------	-------------	---------------	------------


Cancel




From the “Select Type...” popup, click on the button for the product type you want – if you have openers, use that as the type

Select Type for New Product

Awning	Casement	Fixed	Push Out
--------	----------	-------	----------

 <=Back Cancel

In the product detail popup, specify how many panels and how many openers:

New Product Details 

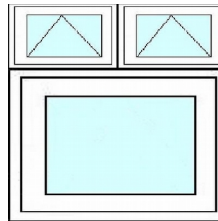
Family Windows
Type Casement

Panel Count

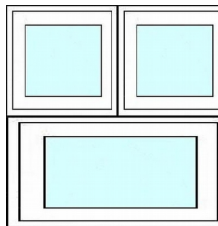
Operator Count

Toplite Count for doors


..this would be 3 panels, 2 openers



...this would be 3 panels, 0 openers



From the new product layout popup, choose the template that best matches what you want.

New Product Layout 


Family Windows-PH
Type Awning

Panel Count 3

Choose the template that best matches the product you want to quote.

?	?	?	?	?
?	?	?	?	?
?	?	?	?	?

If the layout is added to an existing product, it will be priced like that product. If the layout is created with a new product, it will be priced as sum-of-panel-prices.

Add Product	
 3-1	
Quantity	<input type="text" value="1"/>
Standard Sizes	n/a
W x H Inches	<input type="text" value="inches"/> x <input type="text" value="inches"/>
W x H mm	<input type="text" value="mm"/> x <input type="text" value="mm"/>
Size Type	<input type="radio"/> <u>Frame Size</u> <input checked="" type="radio"/> <u>Rough Opening Size</u>
Location Optional	<input type="text"/> <input type="button" value="Pick"/>
Options	<input checked="" type="radio"/> <u>Like last quote for customer</u> <input type="radio"/> <u>Default for product</u> defaults from family settings

Product created with selected layout - use [Customize] to tune after adding to quote.