



ORDERING ON WINDOW DESIGNER CLOUD





CLIMATEC'S ON-LINE ORDERING PORTAL

We are presently using the First Degree Systems, Window Designer for the Web application. While this platform uses Climatec's materials and prices on it, the system itself is hosted by First Degree servers. All our data is encrypted, and they have no actual access to that data. From time to time they may experience reduced capacity or temporary problems which they are quick to remedy, and we work closely with them to maintain as smooth a service as is possible on a web-based platform.

While many customers use the system firstly and primarily as a pricing tool, our main goal is to encourage our customers to use it to place orders. There are a number of benefits for both parties should online ordering be utilised.

- No need to fill out time consuming order forms by hand, and then employ a method of sending them.
- Often most of the work has already been done at quoting stage, this can then be converted and modified into an order.
- Less wait time for Order confirmations.
- Less human involvement, meaning less chance of time consuming errors.

It is a common misconception among customers, that jobs released to Climatec using the online system, are immediately sent for manufacture as soon as they are received and are unable to be amended in any way. This is not the case.

Once we receive your job onto our system:

- we open it
- assign it a Climatec job number
- assign it an actual delivery date
- Give it a general glance over from the main screen (to make sure there are no unsuitable styles and sizes etc.)
- Then an order confirmation is generated and returned to you in exactly the same manner you would normally expect to receive one.

The process then proceeds as you are used to.

- You can check the order details (which is now in essence your own work)
- Contact us to make changes for whatever reason, within the pre-existing time scales you currently enjoy. (Preferably in writing via email.)

If you have any further questions regarding the on-line ordering process; or the following instructional guide, please email Dave Russo - d.russo@climatecwindows.co.uk or Steve Hazeltine - s.hazeltine@climatecwindows.co.uk

If you are already using the system to order and have any queries with processing, please call any of the processing team.

1.0



Job/Quote History

Recent Jobs

- 000012 - Windowcraft [Unknown] -
- 000021 - DR_TEST_VS
- 000016 - Windowcraft
- 000023 -
- 000024 -
- 000025 - Test Windows
- 000028 -
- Search...

Recent Quotes

- 000055 - Kohla
- 4321 - Retail customer
- CHI001 - Retail customer
- 1801 - Retail customer
- 000058 -
- 1 -
- 000060 -
- 000057 -
- Search...

Released Jobs

Search...

Rejected Jobs

Search...

Accepted Jobs

Search...

1.0

Before an order can be sent from within WD4WEB it must exist as a 'Job' not a 'Quote'

If you need to convert an existing Quote into a Job go to step 2.0, if it is already a Job go to step 4.0



2.0



Job/Quote History

Recent Jobs

- 000012 - Windowcraft [Unknown] -
- 000021 - DR_TEST_VS
- 000016 - Windowcraft
- 000023 -
- 000024 -
- 000025 - Test Windows
- 000028 -
- Search...

Recent Quotes

- 000055 - Kohla
- 4321 - Retail customer
- CHI001 - Retail customer
- 1801 - Retail customer
- 000058 -
- 1 -
- 000060 -
- 000057 -
- Search...

Released Jobs

Search...

Rejected Jobs

Search...

Accepted Jobs

Search...

2.0

Click on [Quote to Job] The enquiry box on the right will open.

If you know the Quote number, enter it into the top field.

A quote can be located by using any of these search fields. Obviously the quote has to have information in those fields that are being searched.

Tip: By using * as a wildcard you will have more success searching. Try putting a * at both ends of your search word or number. See examples

When ready click [Ok]

Convert Quote to Job

Specific Details

Quote Number: *123456*

Customer Name: *smith*

Customer Post Code:

Customer Reference: *church*

Job/Quote Comment:

Customer Order No:

Contract No:

Specification No:

Load Code:

Exact Load Code Match

Salesman:

Customer Type: All

Mobile User:

Specific Range Status Job Stage Printouts Material List Work Centres Other

Clear Ok Cancel

2.1

Window Designer Cloud - User: retail

New Job Print Job(s) Duplicate Job Send Job(s) New Quote Print Quote(s) Dup. Quote Quote To Job Logout Support

Job/Quote History

Recent Jobs

- 000012 - Windowcraft
- [Unknown] -
- 000021 - DR_TEST_VS
- 000016 - Windowcraft
- 000023 -
- 000024 -
- 000025 - Test Windows
- 000028 -
- Search...

Recent Quotes

- 000055 - Kohila
- 4321 - Retail customer
- CHI001 - Retail customer
- 1801 - Retail customer
- 000058 -
- 1 -
- 000060 -
- 000057 -
- Search...

Released Jobs

Search...

Rejected Jobs

Search...

Accepted Jobs

Search...

2.1

This is the result screen for the search results. Depending on your search criteria you may see multiple Quotes - like this, or you may see only the one you require.

(The results seen here are the outcome of *smith* typed in the Reference field on the previous step.)

Left click on the Quote you wish to convert. It will turn highlighted like this. You may only convert one Quote at a time.

Click [OK]

Convert Quote to Job - 12 Quotes available

Search Results | Configure Display | Search Information

Quote Number	Stat	Cust Code	Customers Name	Reference
000016		RETA01	Retail customer	smith
000017		RETA01	Retail customer	smith
000019		RETA01	Retail customer	smith
000022		RETA01	Retail customer	Smith
000031				smith
000062				smith
000094		RETA01	Retail customer	smith
001			BMC	BMC SMith
CC001			Mr Smioth	Smith
CC001		RETA01	Retail customer	Smith - Ham
dmd000103				smith
sut001254		TEST01	Test Windows	smith

OK Cancel Help

2.2

Window Designer Cloud - Qte:000062 <> - (retail) - [CALIBRE 70]

New Bay New Cons. Edit Frame Edit Layout Edit Roof Edit Cons. Delete Render 3D Reports

ems 3D Extras Glass Extras One Off Extras Summary 3D Reports

6:50:46

2.2

Click [Yes]

Convert Quote to Job

Are you sure you want to convert this quote to a job?

Yes No

2.3



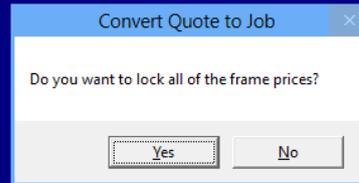
10/09/2015 16:50:46

2.3

Click [No]

This will reset any prices that have been over typed by you at the quoting stage. Which should be the preferred method, so you are creating the job with the correct pricing from us.

However, if the quote is older than 6 months it may not find Climatec's latest price list! A brand new quote should be created!



2.4



10/09/2015 16:50:46

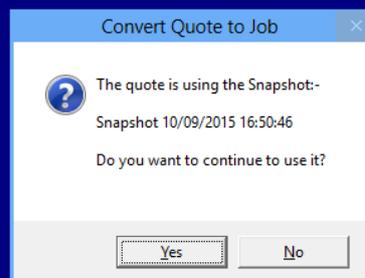
2.4

Click [No]

Again we want Window Designer to use the most up to date materials available.

The 'Snapshot' date will change depending on when the quote was first entered.

However, like the last stage. If the quote is older than 6 months it may not find Climatec's latest price list! A brand new quote should be created!



3.0

You will then automatically end up here.

This is the main details screen for what will now be a Job version of the Quote.

You can see the original Quote number still in place.

Now you must enter a Job Number.

This would normally be the same number you would assign a job within your own systems and procedures.

It is advisable to use a unique Job Number for every Job saved on the system.

Even if a Job consists of multiple parts. If not there is a danger one will overwrite another.

Also when releasing Jobs to Climatec in quick succession, identical numbers will cause the later one to bump an earlier one off of our screen, we wont know it has even been sent!

If you only use a numerical system, it would be beneficial to Climatec if you could add a company specific prefix, maybe the first 2 or 3 letters of your company name. This makes it immediately clear when it arrives this end, who it is from.

We will then use this number as your reference in all future correspondence regarding this job.

Note: The reference field on this page does not get sent with the job.

See the next page for where to put a Reference you want us to use.

(All the Customer details on the far left are still for your use only (your customers) and will not be sent with the job.)

3.1

Window Designer Cloud - Job: <> - (retail) - [REHAU Total 70 -]

Using Snapshot 05/07/2022 16:55

Manufacturer Details

Delivery Address Details

Name: CLIMATEC HOME IMPROVEMENTS LTD

Address 1:

Address 2: # FOR PRICING PURPOSES ONLY #

Address 3: # INVOICE THROUGH ACC C062 #

Address 4:

Post Code:

Tel No:

Fax No:

Installation Address

Name:

Address 1:

Address 2:

Address 3:

Address 4:

Post Code:

Tel No:

Fax No:

Job Information

Job No:

Required Date:

Delivery Date:

Contract Number:

Contact Name:

Customer Order No:

Reference:

Comment:

Released To Manufacturer Info

Retailer Job:

Private:

Release To Manufacturer:

Release To Customer:

Release To Supplier:

3.1

Entering a Reference in this field will automatically end up as the job reference our end.

Note that is the second tab along to the main details where the Customer details screen open initially.

3.2

Window Designer Cloud - Job: CL19999 <> - (retail) - [CALIBRE 70]

Using Snapshot 01/03/2018 14:15:30

Edit Customer

Main Details | Additional Details | Manufacturer Details | Material List Details

Customer

Customers Code:

Add To Database:

Main Address Details

Main Name:

Main Address 1:

Main Address 2:

Main Address 3:

Main Address 4:

Main Post Code:

Main Tel No:

Main Fax No:

Main Mobile No:

Delivery Address Details

Del. Name:

Del. Address 1:

Del. Address 2:

Del. Address 3:

Del. Address 4:

Del. Post Code:

Del. Tel No:

Del. Fax No:

Del. Mobile No:

Additional Information

Contact Name:

Sales Rep:

Customer Type: Cost Plus Pricing

Sales Area:

Source:

Job/Quote Information

Quote Number: 000062

Job Number: CL19999

Reference: smith

Comment: CAL WHT

Delivery Date:

Estimated Units:

Specification No:

Contract Number:

Colour:

Retailer Required Date: 30/04/2018

Markups/Discounts/Options

Markup:

Job Discount 1 %:

Carriage Charge:

April 2018

Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

Today: 07/03/2018

3.2

The only remaining thing to do is input a date into the field shown here (Retailer Required Date) This will be when you would prefer delivery. As ever Climatec will strive to meet this request but it cannot be guaranteed.

Click [Ok]

This will return you to the main screen, where you can make further product amendments, before Closing and Saving.

It is now a Job in the Job database part of the system.

4.0



Job/Quote History

Recent Jobs

000012 - Windowcraft
[Unknown] -
000021 - DR_TEST_VS
000016 - Windowcraft
000024 -
000025 - Test Windows
000028 -
Search...

Recent Quotes

000055 - Kohila
4321 - Retail customer
CHI001 - Retail customer
1801 - Retail customer
000058 -
1 -
000060 -
000057 -
Search...

Released Jobs

Search...

Rejected Jobs

Search...

Accepted Jobs

Search...

Job/Quote History

Batching

Maintenance

4.0

(For those that have had to convert a Quote to a job these next search steps are largely identical.)

Click on [Send Job(s)]
The enquiry box on the right will open.

If you know the Job number, enter it into the top field.

A Job can be located by using any of these search fields. Obviously the Job has to have information in those fields that are being searched.

Tip: By using * as a wildcard you will have more success searching. Try putting a * at both ends of your search word or number.

See examples

When ready click [Ok]

Send Job(s) to Manufacturer

Specific Details

Job Number: "123456"
Customer Name: "smith"
Customer Post Code:
Customer Reference: "church"
Job/Quote Comment:
Customer Order No:
Contract No:
Specification No:
Load Code:
 Exact Load Code Match
Salesman:
Customer Tjpe: All
Mobile User:

Specific Range Status Job Stage Printouts Material List Work Centres Other

Clear Ok Cancel

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4.1



Job/Quote History

Recent Jobs

CL19999 -
000012 - Windowcraft
[Unknown] -
000021 - DR_TEST_VS
000016 - Windowcraft
000024 -
000025 - Test Windows
000028 -
Search...

Recent Quotes

000062 -
000055 - Kohila
4321 - Retail customer
CHI001 - Retail customer
1801 - Retail customer
000058 -
1 -
000060 -
000057 -
Search...

Released Jobs

Search...

Rejected Jobs

Search...

Accepted Jobs

Search...

Job/Quote History

Batching

Maintenance

4.1

This is the result screen for the search results.

Depending on your search criteria you may see multiple Jobs - like this, or you may see only the one you require.

Left click on the Job you wish to send. It will turn highlighted like this.

You may select multiple jobs to send in one go.

Hold [Ctrl] key down continue selecting further jobs (as shown here.) If you incorrectly select one, simply click on it again to de-select.

Click [Ok] when happy with selection(s.)

(If your Job is not visible try returning to the previous search step by clicking on [Cancel] when there click on [Clear] and then re-input search parameters and click [Ok] again.)

Send Jobs to Manufacturer - 19 Jobs available

Search Results Configure Display Search Information

Job Number	Quote Number	Stat	Cust Code	Customers Name	Postcode
000008					
000011	000047			composite door test	
000012	000012		RETA01	Windowcraft	
000015	000015			Windowcraft	
000016	000016			Windowcraft	
000021				DR_TEST_VS	
000024	000014		Brophy Deb		
000025			TEST01	Test Windows	
000028					
000028				dup job no test	
000028				dup job no test1	
000028				dup job no test4	
000028	000067			dup job no test3	
CL19999	000062				
File:[re14f0*1]				steve c	
File:[re4477*1]					
File:[re6937*1]	MG001		RETA01	Retail customer	
File:[re84c2*1]					
File:[re472*1]	UM0001			Mr Smith	

Select All Deselect All

Ok Cancel Help

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Send To Manufacturer Summary

Zoom: To Fit Page 1 of 1

Order Release Confirmation
The following have been released for manufacturing:

From:	CLIMATEC HOME IMPROVEMENT LTD	Job Number:	CL19999
Reference:		Released On:	07/03/2018
Required:	30/04/2018		

ITEM	QTY	WIDTH	HEIGHT	LOCATION	DESCRIPTION
1	1	600	1200	Window 1	Casement - White

Print Close

4.2

You will then see this confirmation screen.
This one is for a single Job, it will have multiple boxes if you chose multiple jobs to send on the previous step.
Save or print this for your records as proof of Job release.

Your Job(s) are now sent.

It is recommended that at this stage you send an email to orders@climatec-windows.co.uk informing us that you have 'dropped' jobs.
This is also an opportune time to add any additional concerns or information you feel needs bringing to the attention of the order processing team.



Job/Quote History

Recent Jobs

- CL19999 -
- 000012 - Windowcraft
- [Unknown] -
- 000021 - DR_TEST_Y5
- 000016 - Windowcraft
- 000024 -
- 000025 - Test Windows
- 000028 -
- Search...

Recent Quotes

- 000062 -
- 000055 - Kohila
- 4321 - Retail customer
- CH1001 - Retail customer
- 1801 - Retail customer
- 000058 -
- 1 -
- 000060 -
- 000057 -
- Search...

Released Jobs

- CL19999 - Required 30/04/18
- Search...

Rejected Jobs

Search...

Accepted Jobs

Search...

Job/Quote History

5.0

You will be returned to here after sending.

You can see recently released Jobs here.

As we open and bring the Jobs into our system these will migrate to the Accepted Jobs area.

We will never Reject a job (on purpose, it sometimes happens by accident, you will be contacted if this happens.) If there are any issues on a job we will accept it and then contact you in the usual way to discuss any changes that need to be made.

