

# Sunspace Dealer Desktop Version 3.0

## Users Guide and Reference

- July 2009 -

The Order Genie

## Table of Contents

Introduction	3
Using the Order Genie	4
The Order Editor	4
Ordering Windows	4
Ordering Doors	5
Ordering Railing	5
Railing Layout and Post Calculator	6
Add Update Delete	7
Saving Your Order	7
Creating New Orders	8
Opening Genie Orders	8
Submitting Your Genie Order	8
Print Manager	8
Price Calculator	9
Customer Data	9
Special Instructions	9
Converting Version 2 Projects	9
Notes	10
A Note about Navigation	
A Note about Default Buttons	
A Note about Railing Options	
A Note about Small Laptops	

## Introduction

The Sunspace Dealer Desktop Version 3.0 contains 2 major programs for your business. The new program is the Order Genie. The Order Genie is used for creating orders of Windows, Doors and Railing Systems. The other program, most of you know very well, is the Sunroom Designer. The Sunroom Designer exclusively uses the Wizard and Project Editor while all the other major parts of the Desktop like My Projects, Print Manager and Price Calculator are now used by both programs

This User Guide covers the Order Genie side of the Dealer Desktop.

If you would like the Dealer Desktop Version 2 User Manual, call or email me to request one. The user manual covers the Sunroom Designer side of the Dealer Desktop.

One of my constant goals in updating the Dealer Desktop is to make it more graphical. Words can mean a lot of different things to different people but a picture is not so easily mistaken. It seems to me that the most accurate way of taking an order is with a 'what you see is what you get' approach. That is what I have done with the Order Genie.

I believe the Order Genie is an easy program to use. Still there are some features that may be overlooked if they are not brought to your attention. Therefore I would recommend that you use this guide as a walkthrough while you explore the Order Genie.

Remember if you have any questions, bug reports, need help, etc feel free to get in touch with me.

Dan 'the Programmer' Howes

1-800-755-3365 ext #35

[dan.howes@sunspace.ca](mailto:dan.howes@sunspace.ca)

## Using the Order Genie

When you log in to the **Sunspace Dealer Desktop**, the starting page is the **Desktop**.

There is a list of *web page style* links on the left. When your cursor is above any of the links a balloon appears in the center of the screen telling you what you can do by following the link.

To create a New Genie Order Click either; the **New Genie** Button on the Main Toolbar, or the **Start a New Order Genie** Link on the Desktop.

## The Order Editor

When you create a new Genie Order, you will start in the **Order Editor**. The Order Editor has 4 sections. The first section, on the top left of the screen, contains all the **items** (Windows, Doors and Railing) and their respective properties. This section will be referred to as the **Item Properties**.

The next section, in the middle of the screen, is used to **Add, Edit** and **Delete** items in your order. Also, in this section, you can set the **quantity** of items. The Genie will return the **List Price** of the item including all of the options you have selected.

The third section, on the Far Right of the screen, displays a preview drawing of your item based on the specifications selected in the Item Properties. There is a button on the top right of the Preview section. Clicking it will make a bigger Preview section. The bigger preview works well with wide monitors. You can even change the background color of the preview section, which comes in handy when your frame color is White. Right click in the Preview section to use the color selector.

The Fourth section, on the Bottom of the screen, is the **Order List**. The Order List displays the items that you have added to the order.

The Item Properties has a set of **tabs** which allow you to switch between **Windows, Doors** and **Railings**.

## Ordering Windows

Select the **Type of Window** you would like. Windows are divided into Vinyl and Glass.

**Vinyl windows** are selected by: in the case of Vertical 4 Tracks, by Vent configuration and with Horizontal Windows, by number of Tracks. Other Vinyl Window choices are Fixed Lite and Trapezoids.

**Glass Windows** that are available are Horizontal Sliders, Fixed Glass and Trapezoids. The Glass windows are selected with either Aluminum or PVC frames.

Once the **Window Type** is selected all the available options will be visible.

Select the Options and Enter the Dimensions that you require.

If the Dimensions you are entering are to be **Tip to Tip**, click on the **DLO** link in the Dimensions Frame. It will now say Tip to Tip. Clicking on it again will switch it back to DLO.

If the Dimensions you are entering are to have a Deduction, click on the **No Deductions** link in the Dimension Frame. It will cycle through the following: No Deduction, 1/8", 1/4", 3/8" and 1/2".

**Spreader Bars** can be removed from Vinyl Windows that are small enough; under 36" width for V4T with 3 or 4 Vents and with Horizontal Windows, the Height must be less than 54". Spreader Bar is always selected (checked) by default when you select a new Window Type.

Once you have entered the dimensions of a window that is in-between the minimum and maximum values for that type; the **Add New** button will be enabled, the **Preview** frame will display a drawing of the window and the **List Price** will be displayed.

The List Price includes any **Retail Markup** you have selected. Retail Markup is covered in more detail in the **Price Calculator** section of this guide.

To add the Item to your order, use the **Add New** button. If you want more than one Item with the selected options and dimensions, then adjust the **Quantity** to the number you want.

## Ordering Doors

To order a Door change the Tab in the Item Properties to Doors. Then you can select the **Door Type** you would like. The doors are listed as Entry Doors (a.k.a. Swing, Cabana) and Patio Doors.

Once you have selected a Door Type, the available options will be visible.

For all Entry doors the options include; Door Size, Hinge and Swing, Hardware and Kickplate Height.

**Vertical 4 Track** doors have some additional options as well. These options are; Frame Color, Vinyl Tint, Number of Vents and Uneven Vents.

The **Door Size** has 3 pre-set choices; 30x80, 32x80 and 36x80. The other option is **Custom Size**, which allows you to enter any size within the minimum and maximums allowed.

**Patio Doors** are divided into Aluminum and Vinyl Guard. Aluminum Patio Doors are available in 4 Sizes; 5', 6', 7' and 8', while Vinyl Guard Patio Doors are only available in 5' and 6' sizes.

The only options for Patio Doors are Frame Color and Glass Tint.

## Ordering Railing

Once the Tab for **Railing Sections** has been selected, the first step in creating a Railing Order is to select the **Type of Railing Section** you would like. The Railing Sections are divided into 4 types; Ornamental (30" high), Structural (36" or 42" high), Decorative (18" or 24" high) and Railing Gate Sections (36" or 42" high).

You can input the Railing Size by entering the **Section Width** or by entering the **Outside Measurement**, which includes the Railing Posts and Base Covers.

If you want to calculate a Span that needs more than one section, there is a button called **Span Calc.** To use the Span Calculator, enter the total distance that you require (outside measurement –

including Posts) and the Span Calculator will return the **Section Width** and **Quantity** of Sections needed. The Span Calculator gives you an option to have a **1-½" Mid Span Post** for your sections. Using the 1-½" Mid Span Post will allow you a maximum section width of 180". Clicking the Apply button will add the Sections to your order.

**Stair Railing** is only available for Picket and Belly Picket Sections. To order a Stair Railing; check the Stair Railing checkbox and enter either the **angle** of the stairs or the **rise**. All of the Picket Railing options can be applied to Stair Railing Sections.

**Railing Options** are accessed with the **View Options** button. Colonial Handrails are available for all Railing types. The Options for Picket Style Railings include 1-½" Mid Span Post, Double Bar, Rings and Collar Pickets.

Options available for **Glass Sections** are Glass Tint and Number of Pickets per side. The Number of Pickets option allows you to have between 0 and 5 pickets to be installed between the Section Edge and the Glass. The default is one picket.

Selecting any of the options will immediately update the Preview picture as long as you have a valid size entered in the Section Size frame.

Once you have added all your Railing Sections, you'll want to add some **Railing Posts** to your order.

Railing Posts can be entered by selecting the Type of Post, Color, Height and Quantity.

Another way to input your Railing Post Requirements is to **Draw a Railing Layout**.

### Railing Layout and Post Calculator

To use the **Railing Layout and Post Calculator**, click the button in the Item Properties under the Railing Posts Tab. Note that to use this feature you must have at least one Railing Section in your Order.

To create a Railing Layout, **Select a Railing Section** from the Section List found at the bottom of the form. The railing section, once selected, will be drawn on the Layout Canvas from an overhead perspective.

The Railing Section on the Layout Canvas can be **moved** around the Canvas by clicking and holding down the mouse button. When you release the mouse button the Genie will draw a Railing Post at both ends of the section and update the Post Count.

Moving a section within 6 scaled inches of an Existing Railing Post will **snap** the Railing Section to the post. When a post is snapped, a starter is added to the existing post. You can pull apart snapped sections by dragging them more than 6 scaled inches from the post.

To Change a Railing Section's **orientation** on the layout canvas you will need to right-click on the section. This can be done directly on the section on the Layout Canvas or on the Section in the Section List. When you are selecting sections from the section list, you can Right-Click to start the Section with an up/down orientation.

Click the update button to Save the Layout Drawing and add the Posts to your order.

Once you have a Layout Drawing it will be shown in the preview window when Railing Posts is selected and in My Projects when the Project is open. There will also be a Railing Layout option in the Print Manager.

If after you have created a railing Layout, you add, edit or delete any railing sections, your railing layout will still exist. Any Railing Sections that you delete from your Order are removed from the Layout. Railing Sections that are edited may need to be re-added. You should return to the Railing Layout and Post Calculator after you have made all your changes, especially if your post count needs to change as a result.

F.Y.I. To notify you that your Railing Order and Railing Layout are not the same, an astrix (\*) will be visible on the Railing Posts tab.

### Add Update Delete

The **Add** button is enabled once you have enough information to make the item. There may be times when ordering **Windows** you want to order a window that is smaller or larger than the window size parameters. In this situation you can **Turn Off the size validation**. This will allow you to order an item of any size. Note that the Order Genie may not return a Price for non-standard sized items.

To **Update** or **Delete** an Order Item in the Order Editor you must first select the Item from the Order List. Selecting an item will load the item into the Item Properties and enable the Update and Delete buttons.

To Update the Selected Item, make the changes and Click the **Update** Button.

You can still add an Item when an Item is Selected.

**Tip:** If you wanted to add an item like one of the other items in your order you can do this by; selecting the item like the one you want to add, change the desired Properties and then Click **Add New**. If you want to change the Quantity of an Item you can select the Item, change the Quantity and then Click Update.

### Saving Your Order

The Order Genie will prompt you to save an Order before closing the Genie Order.

You must enter a **tag name** before you can save. The Project Name (name used to save the file) is the same as the Tag name until the save file is created.

If you want to manually save your file, you can use the Save menu at the top of the screen or press **Ctrl+S**.

To tell if your project needs a save, look at the program caption (very top left of your screen). If there is an astrix (\*) after Sunspace Dealer Desktop, the project needs to be saved.

## Creating New Orders

To Create a New Genie Order, click on the **New Genie** button on the Main Toolbar. Alternatively, you can click on the **Start a New Genie Order** Button on the Desktop. If you have a Genie Order currently open, you will be prompted to save the order.

## Opening Genie Orders

To Open a Genie Orders click on **My Projects**. Set the option above the File List to **Genie Orders** and all of your Genie Order Projects will be listed there. Simply select a project and use the Open Project button or double click the project name from the File List. When a project is selected, the type of project, date created and the date the project was last modified are displayed.

## Submitting Your Genie Order

Submitting files is as easy as clicking the submit button which is located in Open Project Lobby. The Open Project Lobby is the screen you see when you open a Project. To get to the Open Project Lobby from the Order Genie, Print Manager or Price Calculator, just click the close button on the Right of the Open Project Toolbar.

## Print Manager

When you have a Genie Order open and you launch the Print Manager the Print Manager will load the **Specification Sheet**. The exception is when you navigate from the Price Calculator to the Print Manager, in which case the Proposal or Order Confirmation is loaded.

The Order Genie Spec Sheet can be printed three different ways: Text Only, Text and Pictures and Pictures Only. **Text Only** writes a list of the Items with all the specs for an item written in a single Line.

**Text and Pictures** will use the left 60% of the page to list the specs. The specs will be listed in two lines, one for the Item Type and Dimensions and the other for the options. The right column in Text and Pictures is used to display up to 4 pictures. The Order Genie will choose pictures that represent any diversity in your order.

The Third way to Print the Spec Sheet is **Pictures Only**. With Pictures Only the Spec Sheet is divided into 6 frames with each Item being drawn in its own frame. The exception is Railing Posts which are listed text only no matter which way the Spec Sheet is printed.

With any spec Sheet that has pictures, an option to print in black and White or Color will be visible.

Trapezoid windows are not able to be colored in the printout.

If your order has a **Railing Layout**, there will be a button to print the Railing Layout in the Print Manager.

You can add a message to your Proposal by clicking on the **Proposal Message** Button. The Proposal Manager Button is only visible when you have a Proposal loaded in the Print Manager

## Price Calculator

When you launch the Price Calculator, your entire order will be totaled. The Price calculator displays the price as M.S.R.P. (as in the Price Book) plus any retail Markup you have added.

**Markups** set in the User Options will be covertly added to the M.S.R.P. The Genie uses 5 separate markup values; Glass Windows, Vinyl Windows, Doors, Picket Railings and Glass Railings. Note that Railing Posts always use the Picket Railing Value.

Markups can also be adjusted on a per Order basis. To view or change the Markup in an order, select **Retail Markups** from the Price Calculator menu. Any Markups used will be saved along with the project.

To see the wholesale cost for your order, click on **Wholesale** in the Price Calculator menu.

All the other information that you might want to add to your proposal (Terms, Installation, Discount, etc) is exactly the same as in Version 2. New charges can be added and Rows can be edited. Edited rows have an astrix (\*) in the last column.

## Customer Data

If you want to enter any information about your Customer, click on the Order Genie menu and then **Edit Customer Data**. This information will show up on the Proposal and be saved with the Order.

## Special Instructions

Special Instructions is a way to add any additional information to your order. The Special Instructions are written on all Specification Sheets. You can edit the special instructions by clicking the edit button. The Special Instructions Editor has 2 text areas; a large one with the existing instructions and a small textbox for adding new instructions.

You can use the Editor to add instructions or they can be added directly from the Open Project Lobby. **Tip:** The **Add Instr.** Button in the Open Project Lobby is a **Default Button** (See note on page 10). You can enter multiple instructions without leaving the textbox. Just press the **[Enter]** key on your keyboard at the end of each instruction.

The Special Instructions will be **numbered** by default. You can remove the numbers by un-checking the checkbox in the Special Instruction Editor.

## Converting Version 2 Projects

To **Convert Projects** that were made with the **Version 2 Window ordering program**, click on the link on the Desktop. This will launch a new window that has a list of all of your version 2 window projects. Select the file you would like to convert and click the convert button. By default, the converter will price every item. If you want the Project to retain its original prices, uncheck the **Update Price** checkbox. When you are done converting all the projects that you want to convert, click the done button to close the Converter. The converted files can be accessed from **My Projects**.

Notes:

## A note about Navigation

The **Main Toolbar** has 4 buttons; Desktop, Projects, Wizard and New Genie.

Clicking New Genie will launch the Order Genie's Order Editor. Notice that **Projects** is now the selected Button.

If you wanted, for example, to change your default markup after you have started a Genie Order, you would; Click on **Desktop** (on the Main Menu), then from the desktop, the **Options** Link, and from the Options page you would click the **Price Calculator** Link. Now you can change the Markup and Press Update.

To return, all we would need to do is click on **Project** (on the main menu). That would take us back to our Genie Order in Progress.

## A note about Default Buttons

The Default Button is special because it gets clicked when the **[Enter]** key on your keyboard is pressed and your *focus* is in a textbox. In the Order Editor, when you have a selected Item, the Default Button is Update. When no item is selected the default button is Add New.

The default button can be used to enter Window and Railing orders very quickly, especially if all your Window Items have the same style and height. Set all the common properties and input the width. Press **[Enter]** without your cursor leaving the Width textbox. Now you can change the width using the Backspace and Number Keys and Press **[Enter]** again. This can be used to enter Special Instructions quickly too.

## A note about Railing Options

Some options for the Picket Railing Sections (Rings and Collars) are only centered when the section contains an odd number of pickets.

There is a checkbox in the **Railing Options** that, when checked, will try to make an odd number of pickets. This checkbox is called **Try To Center**. It works with only some sizes, as adding or removing an extra picket is not always possible.

## A note about Small Laptops

If you are using a small (7") style notebook, the New Project Wizard extends beyond the viewing area. To remedy this, go to **Options** and click on the **Small Wizard** checkbox. Clicking the **Update** button will save this setting so that the Wizard always displays in small screen mode.