

**BLAIR
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Quality windows, doors, conservatories and roofline

PROFITMAKER USER MANUAL



REVISION 1

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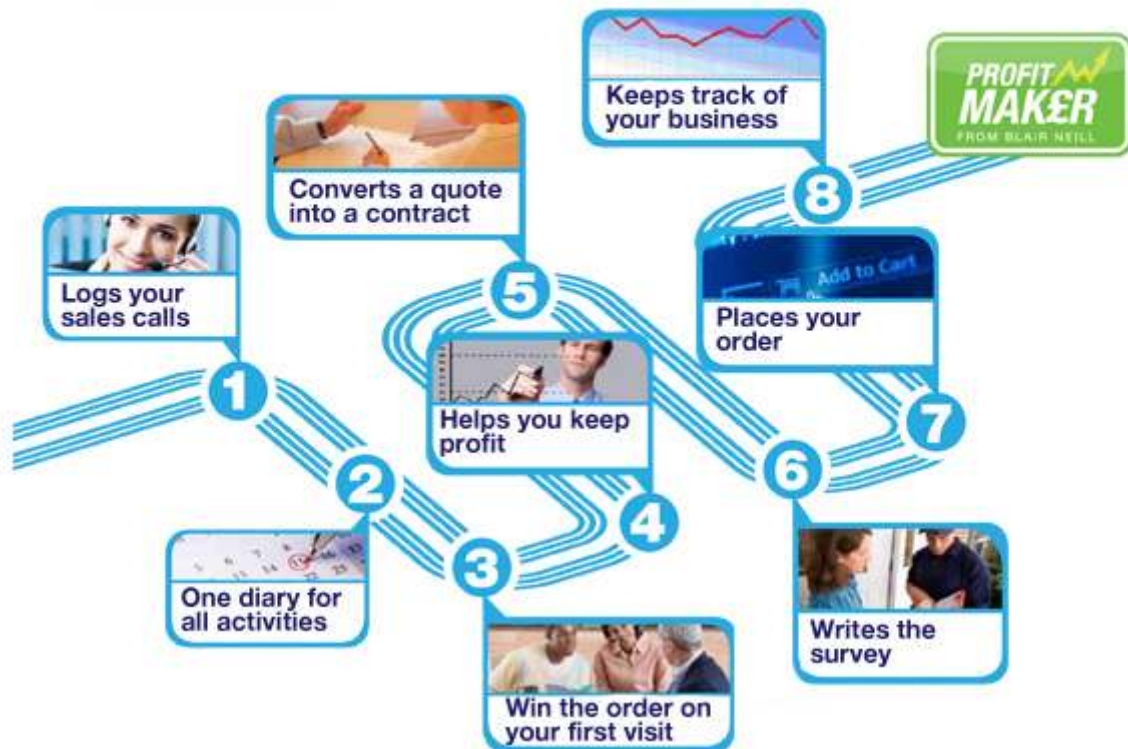
Profitmaker Overview

What are the benefits of using Profitmaker?

- ⇒ The program is entirely internet based. This means that you can access the program from any computer that has a connection to the internet. This in turn means instant support from us if you have a query about a quote or job. Instant product updates. All your users can access the same content if required.
- ⇒ Your Profitmaker account is tailored to YOU. All your costs are entered into the program, to ensure the final cost of a job includes YOUR glass/panel costs and YOUR fitting costs. No more sending glass lists to your supplier for costs. Analyse your overall costs with the contributions tool, and get a clear picture of your profits.
- ⇒ Setup multiple users with different roles/access rights. Sales users can now close the deal from the customers' home. Surveyors/fitters can print documents from home, and update measurements.
- ⇒ Speed and efficiency – Price a job in white, click a button to price the job in another colour, matrix, or glass type. And all done without the need to contact suppliers.
- ⇒ Fully customisable documents tailored to individual needs. A document for every situation provided as standard, with the option for more as needed.
- ⇒ No hidden costs for using Profitmaker. The program is 100% free to Blair Neill customers. Our motive is simple – We help you to sell – You buy more from us.
- ⇒ Monitor your sales and enquiries – Profitmaker tracks your leads/users/costs, and highlights clearly the areas you need to address.
- ⇒ Blair Neill will continue to support its customers, with regular follow up calls from our IT support team.
- ⇒ Online diaries for all your users – All sales calls & installations recorded and planned.
- ⇒ All estimates/jobs recorded – No more sifting through paperwork trying to find a contract from long ago.

Overview Diagram

Your path to more profit with Profitmaker Retail...



Installation/Setup

Profitmaker installation is easier than any other program as it is internet based. Simply put, you do not need a CD, or a software dongle, or even have to download any software.

Ensure you are connected to the internet then open any web browser. The program will run on any web browser, but we recommend Internet Explorer.

In the address bar of your web browser type the address www.blairneill.net
Alternatively you can use a search engine such as Google to search for blairneill.net

When you navigate to the site, bookmark it (add to favourites) to enable you to quickly access the program.

Blair Neill will have issued you with an administrator username and password. Enter these details and when prompted, allow your computer to record these details for convenience.

Company Logos

A default company logo will be generated prior to you starting to use Profitmaker. If possible we will lift this from your website. Feel free to Email us a logo if you would like this default logo replaced. The brand name "Envirohome" cannot be removed from the logo. Please note that your logo is set by default to appear at the top of any documentation printed. (Your logo is also a shortcut to your Profitmaker Homepage)

Your Company Details (Customer Settings)

To edit your company details, click on the "setup" button on the top right of your screen. Note you will only have access to this section if you have administrator privileges.

In this section you can edit your address, telephone/fax numbers, etc. The email address is set to Blair Neill as default, but should be replaced with the email of whoever handles ordering for your company. Global markups are set to zero by default, but you may use this section to set company wide markups, and/or default item extra charges.

The default product view is set to inside view, and cannot be altered.

The "Show other supplier cost on item page" check box is ticked as default, but may be changed at your discretion. If left checked then customers will see your selling price for glass, panels, etc. If you intend to be pricing in front of your customers (Sales user) then we would recommend not showing these costs.

It is vitally important that any changes made are confirmed by pressing the "Save Changes" button.

User Setup

Accessed via the customer settings screen, this section allows you to create new users and assign them roles limited by the level of privileges you assign them. This section is only available to users with administrator access rights.

To create a new user, simply enter a username and password, then click the “Create new user” button. This will take you to the section for assigning user access rights. When changing a users access rights, ensure you click the “save changes” button before leaving the screen.

User Access Rights

- ⇒ Read Only User – Checking this box gives a user access to the system, but does not enable them to use any features. This will automatically remove all other access rights.
- ⇒ Staff Type – The four options in this section (Sales Rep, Surveyor, Installer, and Service Crew) allow you to assign a role to the user. This role specifies which diaries the user will have access to. Leaving these options unchecked means that the user will default to admin, and will have access to all estimates/jobs on your account.
- ⇒ Show Marked Up Prices – Checking this box is an option for sales users who may be creating an estimate in front of a customer. This will prevent a customer from seeing any cost other than the final selling price.
- ⇒ Allow Order Placing – Checking this box allows the user to place an order with Blair Neill. Ideally this should only be checked by the user responsible for order placement.
- ⇒ Allow Job Item Deletion – Allows the user to delete individual units from a job/estimate.
- ⇒ Allow Estimate Deletion – Allows the user to delete estimates. Sales users often have this turned off.
- ⇒ Allow Customer Update – Allows the user to add/edit a customers details on an estimate/order.
- ⇒ Allow Staff Date Editing – This option allows users to assign other users to a job. Primarily this is an option for the main admin user. When a job has been assigned to a user, the user then sees the job in their diary. EG: Salesman wins the job; Admin assigns the job to a surveyor/installer on a specific date.
- ⇒ Allow Survey Monitor Access – Used mainly by the organisation admin to monitor surveys on the main dashboard of the program (Main screen accessed by clicking home/logo button.)

- ⇒ Allow Installation Monitor Access – As above but for installer monitoring.
- ⇒ Allow Service Monitor Access – As above but for service crew monitoring.
- ⇒ Allow Customer Sales reports – As above but for sales reports. This info is displayed on the dashboard, but also appears on the reports tab on the top right of the screen. These reports can be customised and printed.
- ⇒ Allow Supplier Sales Reports – Not applicable. This function is not available to customers and will not be affected by checking the box.
- ⇒ Allow Lead Source Setup – Enables the user to set a new lead source to add to the drop down menu.
- ⇒ Allow Order Entry – Allows the user to put an order on the system. If this is left unchecked, the user will not be able view existing orders.
- ⇒ Allow Order Deletion – Allows the admin user to delete an order. This is only possible before an order is placed. When placed, the order is locked and cannot be deleted or edited.
- ⇒ Allow Estimate Entry – Allows the user to enter estimates on the system. If this is left unchecked, the user will not be able to view existing estimates.
- ⇒ Allow Document Printing – Allows the user to print from the list of documents. Note that any documents customised by a user will affect all users on the account. You should advise each user of this as they are set up.
- ⇒ Allow Component View - Not applicable. This function is not available to customers and will not be affected by checking the box.
- ⇒ Allow Rep Diary Access – Allows the user to access all diaries. Used by the admin to assign estimates/jobs to different users. Accessed via the schedules tab on the bottom left.
- ⇒ Allow Administrator Access – Gives users the ability to use “setup tab” on the top right of screen. This enables cost setup, user setup, depot setup, and the ability to view all estimates/jobs.
- ⇒ Enable Ajax Page Updating – Generally left checked on all users. This feature enables the auto updating of changes made to an item. If left unchecked, this will mean that users must manually click update any time a change is made. Used for users with a very poor internet connection.

Example Admin User Access Rights

Read Only User

Staff Type

Sales Rep

Surveyor

Installer

Service Crew

Access Rights

Show Marked Up Prices

Allow Order Entry

Allow Order Placing

Allow Order Deletion

Allow Job Item Deletion

Allow Estimate Entry

Allow Estimate Deletion

Allow Document Printing

Allow Customer Update

Allow Component View

Allow Staff Date Editing

Allow Rep Diary Access

Allow Survey Monitor Access

Allow Installation Monitor Access

Allow Service Monitor Access

Allow Administrator Access

Allow Customer Sales Reports

Allow Supplier Sales Reports

Allow Lead Source Setup

Enable Ajax Page Updating

This selection is for total control of the system. This user has the ability to monitor all estimates/jobs that are processed on the system. An Admin user can set up new users, and alter prices in the cost setup screen.

Example Sales User Access Rights

Read Only User

Staff Type

<input checked="" type="checkbox"/> Sales Rep	<input type="checkbox"/> Surveyor
<input type="checkbox"/> Installer	<input type="checkbox"/> Service Crew

Access Rights

<input checked="" type="checkbox"/> Show Marked Up Prices	<input checked="" type="checkbox"/> Allow Order Entry
<input checked="" type="checkbox"/> Allow Order Placing	<input checked="" type="checkbox"/> Allow Order Deletion
<input checked="" type="checkbox"/> Allow Job Item Deletion	<input checked="" type="checkbox"/> Allow Estimate Entry
<input checked="" type="checkbox"/> Allow Estimate Deletion	<input checked="" type="checkbox"/> Allow Document Printing
<input checked="" type="checkbox"/> Allow Customer Update	<input type="checkbox"/> Allow Component View
<input checked="" type="checkbox"/> Allow Staff Date Editing	<input type="checkbox"/> Allow Rep Diary Access
<input type="checkbox"/> Allow Survey Monitor Access	<input type="checkbox"/> Allow Installation Monitor Access
<input type="checkbox"/> Allow Service Monitor Access	<input type="checkbox"/> Allow Administrator Access
<input type="checkbox"/> Allow Customer Sales Reports	<input type="checkbox"/> Allow Supplier Sales Reports
<input type="checkbox"/> Allow Lead Source Setup	<input checked="" type="checkbox"/> Enable Ajax Page Updating

These choices are for a sales user, who will deal primarily with the end customer. You will note that allocating this user as a “Sales Rep” ensures that any estimates/jobs they input will not be visible to any other users except an “Admin User”.

By having the “Show Marked Up Prices” box checked, this will limit what is visible to the customer. The customer will therefore only see the final cost to them, and not discounts or markups. Other supplier costs will still be visible unless the admin user turns this off globally on their setup page.

This template does not allow access to “cost setup” or allow the user to apply a markup to the estimate/job. The user can still apply additional costs to individual items on an estimate/job.

Example Sales User – Office Based

Read Only User

Staff Type

<input checked="" type="checkbox"/> Sales Rep	<input type="checkbox"/> Surveyor
<input type="checkbox"/> Installer	<input type="checkbox"/> Service Crew

Access Rights

<input type="checkbox"/> Show Marked Up Prices	<input checked="" type="checkbox"/> Allow Order Entry
<input checked="" type="checkbox"/> Allow Order Placing	<input checked="" type="checkbox"/> Allow Order Deletion
<input checked="" type="checkbox"/> Allow Job Item Deletion	<input checked="" type="checkbox"/> Allow Estimate Entry
<input checked="" type="checkbox"/> Allow Estimate Deletion	<input checked="" type="checkbox"/> Allow Document Printing
<input checked="" type="checkbox"/> Allow Customer Update	<input type="checkbox"/> Allow Component View
<input type="checkbox"/> Allow Staff Date Editing	<input type="checkbox"/> Allow Rep Diary Access
<input type="checkbox"/> Allow Survey Monitor Access	<input type="checkbox"/> Allow Installation Monitor Access
<input type="checkbox"/> Allow Service Monitor Access	<input type="checkbox"/> Allow Administrator Access
<input type="checkbox"/> Allow Customer Sales Reports	<input type="checkbox"/> Allow Supplier Sales Reports
<input type="checkbox"/> Allow Lead Source Setup	<input checked="" type="checkbox"/> Enable Ajax Page Updating

This template is very similar to the standard sales user, with one notable exception. The “Show Marked Up Prices” box remains unchecked, so that the user can see discounts/markups, and apply any markup to a job they require.

Cost Setup

The cost setup section (Accessed via setup) is only available to users with Administrator access rights. Using this section is paramount to saving time when estimating. If you take the time to enter your own cost prices, you eliminate the need to contact your glass supplier. Likewise, if all other costs are personalised you can get an accurate picture of your own profits from a job.

Below is an example of the cost setup with the top two glass costs changed. Note that descriptions have been changed for us to relate glass types. At this time, only the top five descriptions (Window glass) will display in drop down menus and on documents. This is due to programming algorithm limitations, and will be reviewed for Profitmaker second release.

Your Component Setup

To modify the cost or description for a component, click 'Edit' in the rightmost column, then click 'Save' or 'Cancel'

Id	Spec	Description	Your Description	Base Price	Your Price	
1022	M2	28mm (6.4mm) Lam / Elite	Window Lam/Float	127.89	100.00	Edit
44	M2	28mm Diamant / Argon / Warm / Elite 1.4	Window 1.4 (A Rated)	83.79	66.00	Edit
43	M2	28mm Elite / Argon / Warm /1.6	Window 1.6 (A Rated)	74.97	0.00	Edit
42	M2	28mm Elite 1.1 Float	Window 1.1 (C Rated)	51.35	0.00	Edit
512	M2	40mm Triple Glazed Diamant 0.8	Window 40mm	88.20	0.00	Edit
3521	GLSMATRIX	28mm (6.4mm) / Elite Tuff - Argon /Warm Cost	Door Lam/Float	151.41	0.00	Edit
3519	GLSMATRIX	28mm (6.4mm) Elite 1.1 Lam/Lam Cost	Door Lam/Lam	174.93	0.00	Edit
3520	GLSMATRIX	28mm Diamant Tuff / Argon / Warm / Elite Tuff Cost	Door (A Rated) (Tough)	105.84	0.00	Edit
3522	GLSMATRIX	28mm Elite 1.1 Tgh Cost	Door 1.1 (C Rated) (Tough)	73.40	0.00	Edit
3523	GLSMATRIX	40mm Triple Glazed Diamant 0.8 Tough Cost	Door 40mm (Tough)	110.25	0.00	Edit

As we have changed the cost for the first two items, any time we select this type of glass on a window, it will override the “Base (Blair Neill) Price” with Your Price. Note that all items in cost setup are affected by any markups you apply.

Cost Setup Groups

- ⇒ The first five glass types are window glass only (cost per square metre).
- ⇒ The second five glass types are used in doors only. Typically these are the same type of glass as windows, but with toughened cost added.
- ⇒ Next we have all types of obscure glass. Note that this is an extra over cost.
- ⇒ Glass extras are listed next. These include astragal grid (white & foil), astragal single bar (white & foil), georgian grid (white & foil), georgian single bar (white & foil), leaded diamonds, and leaded squares (top only should be the same cost).

- ⇒ Toughen two sides – This should be the extra over cost to toughen window glass. (bottom only should be the same cost)
- ⇒ Full panels from Profile Developments brochure – Current costs are Blair Neill selling prices.
- ⇒ Half panels from Profile Developments brochure – Current costs are Blair Neill selling prices.
- ⇒ Internal window boards – Note that these have zero cost as they are not supplied by Blair Neill. They have been added by customer request. If you supply, you will need to assign a cost.
- ⇒ Fitting charges.
- ⇒ Door knockers.

Lead Source Setup

Here you can add lead sources, or remove existing ones. These sources can be assigned to estimates when entering customer details.

Depot Setup

Here you can create additional depots/branches. This is only relevant if you have multiple departments within your organization. EG: Dublin Depot, Belfast Depot. You can then assign jobs to specific depots.

Schedules & Diaries

On the left hand side of the dashboard you will see schedules and diaries for the different user types. Only Admin staff will have access to the schedules, and only specific users will have access to the diaries. Eg: A sales user will only have access to their personal diary.

As an admin user for your company, you will be able to drag and drop existing estimates/jobs into a user's diary on a certain date. This will then appear in that user's diary. This is handy for instructing sales, fitting teams, installers to call with customers.

Markup Management

- ⇒ A global markup can be applied to your account during setup if required. This can be altered at any time by your admin user. Simply click on the “Setup” button (top right), and change the value of “Default Markup Percent”. The default markup for a new account is always set to 0%. When you set a global markup, this will apply the % to all items on an estimate. Please note that this will only affect estimates entered after the % has been changed. Any older estimates must be changed manually. This method can also be applied to adding a “Default Item Extra Amount”, which will add the desired amount to all items on an estimate/job.
- ⇒ The second method of markup is shown in the below diagram. On the estimate/job screen, you will see the Markup Percent box. This enables you to apply a markup to an individual estimate/job. This will override any global markup already applied.

The screenshot shows a software interface for managing estimates. The left sidebar contains navigation options: Your Orders, Your Estimates, Products, Windows (1-6), French Windows, Tilt & Turns, Resi Doors, French Doors, Stable Doors, Inline Patios, Shaped Frame, Vertical Slider, Extras / Stores, Composite Doors, Fully Reversible, Bay Calculator, Feedback, and Home. The main area displays the following information:

- Estimate No: 25622 [Ok]
- Your Ref: Test Add Item
- Phone: (Items: 0)
- Alt. Phone:
- E-Mail:
- Address:
- Postcode: MAP
- Status: Entering Date Entered: 11/07/2011
- Job Comment:
- Reqd From Supplier: 11/07/2011
- Lead Number: 25622
- Lead Source: [Not Set]
- Sales Rep:
- Sales Appt. Date: 08:00
- Sales Status:
- Balance Outstanding: 0.00
- Deposit Paid: 0.00
- Discount Amount: 0.00 Percent: Apply
- Net Total: 0.00
- Vat @ 20.00%: 0.00
- Total: 0.00 Price Locked

At the bottom, the following summary and actions are visible:

- Total Cost: 0.00
- Markup Percent: (with an arrow pointing to it from the text below)
- Extra Charge Per Item:
- Marked Up Total: 0.00
- Buttons: Apply Markup, Convert to Order, Estimate History, Delete this Estimate, Copy this Estimate, Contribution, [Job Schedule Details], Print Document: Estimate, Document Set-up

Overrides Global Markup on an estimate.

- ⇒ You will note the “Extra charge per item” box beneath the Markup Percent box. This will add a charge, or overwrite the global item charge. This will only affect the estimate/job it is applied to.

⇒ The third level of markup control is on the product level. From this level you can apply a markup to individual items. Note that this level overrides any global, or estimate/job level of markup.

Overrides Global/Estimate Markup on an item.

⇒ Markup is a very useful function of profitmaker for various reasons. Global markups enable you to include all costs beyond what you are paying to your suppliers. For users that sell to different customers at different costs, the markup can be set, and a different discount applied to each type of customer. EG: Trade and Retail customers. (More on applying discount on next page)

Discounts

- ⇒ A discount will be set on your account during setup. This is set by Blair Neill and cannot be altered by users. This discount does not apply to items not supplied by Blair Neill. The user can apply a separate discount to any estimate/job using the area highlighted below. Note that any further discount you apply must be balanced by your markup.

Estimate No: 25622 [Ok]	Reqd From Supplier 11/07/2011
Your Ref: Test Add Item	Lead Number: 25622
Phone: (Items: 0)	Lead Source: [Not Set]
Alt. Phone:	Sales Rep:
E-Mail:	Sales Appt. Date: 08:00
Address:	Sales Status:
Postcode: MAP	Balance Outstanding: 0.00
Status: Entering Date Entered : 11/07/2011	Deposit Paid: 0.00
Job Comment:	Discount Amount: 0.00 Percent: Apply
Total Cost: 0.00 Convert to Order Contribution [Job Schedule Details]	Net Total: 0.00 Print Document:
Apply Markup Estimate History	Estimate
Markup Percent: <input type="text"/>	Document Set-up
Extra Charge Per Item: <input type="text"/>	
Marked Up Total: 0.00 <input type="checkbox"/> Delete this Estimate	
<input type="checkbox"/> Copy this Estimate	

Sets a fixed amount to be discounted from the overall estimate/job.

Sets a % amount to be discounted from the overall estimate/job.

Estimates

Creating an estimate

- ⇒ Click on the “Your Estimates” tab on the left hand side of your homepage.
- ⇒ Click on the “New Estimate” tab.
- ⇒ This is the estimate/job level screen. Here you enter all your information about an estimate. As much or as little info as you require, but please note that the more info you enter, the more feedback and analysis the program will give you.

Entering customer information

The screenshot shows a web-based form for creating a new estimate. The form is divided into several sections. On the left, there is a navigation menu with tabs for 'Your Orders', 'Your Estimates', and 'Products'. Below 'Products', there are several window categories like 'Windows (1)', 'Windows (2)', etc. The main form area contains the following fields and sections:

- Estimate No:** 25865 (Callout 1)
- Your Ref:** (Callout 2)
- Phone:** (Callout 3)
- Alt. Phone:** (Callout 4)
- E-Mail:** (Callout 5)
- Address:** (Callout 6)
- Postcode:** (Callout 7)
- Status:** Entering
- Date Entered:** 28/07/2011
- Job Comment:** (Text area)
- Reqd From Supplier:** 28/07/2011
- Lead Number:** 25865
- Lead Source:** [Not Set]
- Sales Rep:** StevenH
- Sales Appt. Date:** [Date] 08:00
- Sales Status:** In Progress
- Balance Outstanding:** 0.00
- Deposit Paid:** 0.00
- Discount Amount:** 0.00
- Net Total:** 0.00
- Vat @ 20.00%:** 0.00
- Total:** 0.00

At the bottom of the form, there are several summary and action items:

- Total Cost:** 0.00
- Apply Markup:** (button)
- Markup Percent:** (input field)
- Extra Charge Per Item:** (input field)
- Marked Up Total:** 0.00
- Convert to Order** (button)
- Estimate History** (button)
- Delete this Estimate** (checkbox)
- Copy this Estimate** (checkbox)
- Contribution** (button)
- [Job Schedule Details]** (button)
- Print Document:** (button)
- Estimate** (dropdown menu)
- Document Set-up** (button)

The above diagram shows the “job level” of an estimate.

1. Enter your customer name, phone number, etc.
2. Enter customer postcode if available. Clicking on the map button will take you to a printable map to your customer.
3. Assign a Sales Rep to the estimate. This will make this job available to the selected reps diary, and allow you to monitor your users' workload via the dashboard.
4. Assign a lead source to the estimate. This customisable list allows the program to track your leads and display a pie chart on your dashboard.
5. Date required by supplier – This is only relevant if estimate becomes an order. Please note that this date must correspond with your normal delivery day.

You may also choose to set a date for a sales appointment, or assign a tag to the jobs status. EG: Won/Lost/TBA.

Adding items to an estimate

There are two ways to add an item to your estimate. If you look at the diagram on the previous page you will see figures 6 & 7. The add item button will take you to the last product page visited, or if you know the item code you can enter it here. The product pages are listed on the left side of the screen. These product pages contain all items supplied by Blair Neill. Alternatively you can click on a product page then click the “add to job” button located on the individual frame.

The product categories listed on the left are in groups denoted by how wide the window in question is. Eg: Windows 1 = All window styles that are one step across.

Window (F) contains all windows with false mullions or transoms.

Windows (Mids) contains all windows with midrails instead of default 65mm transoms.

Please note that all products are viewed from inside. This is hard coded into the software, and cannot be changed.

Modifying item details

The screenshot shows a software interface for modifying item details. It includes a sidebar with navigation options, a central area for item information and a diagram, and a right-hand panel for specifications and actions.

Callout (1): Points to the **Width** and **Height** input fields in the top right.

Callout (2): Points to the **Transom Drop** input field below the width and height fields.

Callout (3): Points to the **Quantity** input field, which contains the value **1**.

Callout (4): Points to the **Location** input field.

Callout (5): Points to the **Comment** input field.

Callout (6): Points to the **Delete This Item** checkbox option at the bottom of the right-hand panel.

Item Information:
 Item: 1
 Job: 25906
 Code: C2AA
 Casement Window
 Viewed From INSIDE

Diagram: A diagram of a window with dimensions: width 600, height 800, and a transom height of 400.

Specifications Panel (Right):

- Suite: Matrix 70
- Frame Colour: White
- Outerframe: 60mm Outer M70*
- Reinforcing: Standard
- Handle: Handle White
- Hinge: Standard Hinge
- Lock: Espag
- Window Restrictor: No
- Glazing: 28mm Internally Glazed
- Bead Type: Sculptured
- Glass Unit Makeup: 28mm Diamant / Argon / Warm / Elite 1.4
- Glass Pattern: Clear
- Glass Features: None
- Glass Toughened: None
- Slot Vent: None
- Glazed In Vent: None
- Ancillaries Top: None
- Ancillaries Right: None
- Ancillaries Left: None
- Ancillaries Bottom: None
- Mock Horns: None
- Windowboard: None
- Drip: None
- Drainage: Face
- Weld Finish: Knifed
- Fitting Charge: None
- External Cill: No Cill
- Product Guarantee: Yes

Costs and Pricing:

- Cost: 0.00
- Other Supplier Cost: 0.00
- Your Markup %: 0.00
- Your Extra Charge: 0.00
- Your Recommended Sell Price: 0.00

Buttons and Links:

- Ok
- Add Another Item
- Components
- Attach File..
- Delete This Item
- Copy This Item
- Apply this item's Colour to all items
- Apply this item's specification to all items
- Change Product Style Code

The diagram above shows the “frame level” of an estimate. Here you can modify individual items on an estimate. The next page details how to modify items.

1. Entering dimensions to your window. Width and height are restricted by warning messages. If you receive a red warning message, then you will not be able to continue with the estimate until you enter a valid size. If you receive a blue "Outside Spec" warning message, then you will be able to continue but the frame will not be guaranteed by Blair Neill as it is outside recommended specifications.

Transom and mullion width/height can be entered as a value, or the following codes can be entered for handiness: h = half, t = third, q = quarter.

Note that you can quickly move between size input boxes by using the "Tab" key.

2. The frame properties section: Note that all options are set to Blair Neill default. Any choice you make that is not standard will be highlighted in yellow. Any changes you make will carry through to the next frame you add.
 - ⇒ Suite choice – 58mm, 70mm & 70mm fully sculptured are all available. Suites have various options that are specific to them. EG: 40mm triple glazed units are only available in the 70mm suite.
 - ⇒ Frame colours – Each suite has specific colours that are unique to that system. Colorline options are available in all suites; either sprayed one colour, two colours.
 - ⇒ Outer frame is set to the suite specific default for that product. Note that due to changes carrying over to the next frame, you must change door outer frame to the heavier 80mm in most cases.
 - ⇒ Reinforcing is set to standard by default (Hinge side + transoms/mullions) – Full reinforcing is an optional extra. Foiled profile is fully reinforced as standard. All profile that wishes to achieve our lowest U-Value (0.8) should be fully reinforced.
 - ⇒ Handles are set to white as default. Any changes made to profile colour will not change handle colour unless done manually.
 - ⇒ Various hinge choices are available. Please note that the egress hinge listed is a standard 90 degree fire escape hinge. The egress/easyclean option is the more expensive type that allows a home owner to easily clean the outside of the glass.
 - ⇒ Vents – Please note when selecting a vent that you must specify location. Also note that this will carry over to the next frame.
 - ⇒ Ancillaries may be added at the frame level if required, instead of in the stores section. Please note that deductions are not made for stores if added in this way. Also note that stores added here will have steel and pvc as standard.
 - ⇒ Internal windowboard may be added to the frame, but again will not have deductions made. Please note that as this is not a Blair Neill product, you must add your pricing to the "cost setup" section.
 - ⇒ Fitting charges are set to Blair Neill standard rates, but can be set to your personal rates by using the "cost setup" section.
 - ⇒ Product guarantee is set to "Yes" as default, but must be set to "No" if you receive a blue "Outside Spec" error message. This is handy method of discussing guarantees with the customer, and highlighting recommended specifications.
3. Here you can enter the quantity of selected frame, location in the property, and any comments for this item. EG: Ral colour, or paint finish.

4. This section shows your item cost, your discount from supplier, your glass costs, any additional markup/item charge, and your final selling price. This will be covered in more detail in a later section.
5. If you wish to add another item to the job, then click the “add item” button to navigate to the last product page visited. Alternatively if you know the style code for the product, you can add it here.
6. The bottom right section contains the following options:
 - ⇒ To delete the current item simply tick the box, then click the “Delete This Item” button.
 - ⇒ Use the same process to make a copy of this item in the same job.
 - ⇒ A huge time saver is the ability to apply the items colour and/or specification to all items on the job. EG: Estimate created in white, then copied, then all items changed to another colour with one click.
 - ⇒ If you wish to change the style of the current item and you know the style code, simply enter the code in the box and click the button.

Please note that all items discussed in item 6 must have the check box ticked prior to clicking the button.

Estimate Advanced Editing (Job Level)

Total Cost :	0.00	Convert to Order	Contribution	[Job Schedule Details]
	Apply Markup	Estimate History		Print Document:
Markup Percent:	<input type="text"/>	<input type="checkbox"/> Delete this Estimate		<input type="text" value="Estimate"/> ▼
Extra Charge Per Item:	<input type="text"/>	<input type="checkbox"/> Copy this Estimate		Document Set-up
Marked Up Total:	0.00			

In any estimate you will see the following options:

- ⇒ Convert your estimate to an order – This will remove the estimate from “Your Estimates”, and move it to “Your Orders”. This will not place the order.
- ⇒ Estimate History – This feature logs when an estimate was created, when items were added/modified, when/what documents were printed, and which user carried out the actions.
- ⇒ You may delete an estimate by checking the tick box and clicking on “Delete this estimate”.
- ⇒ You may copy an estimate by using the same method as above. This is especially useful for giving customers alternative colour or glass options on an estimate.
- ⇒ Contribution – This is a very useful profit analysis tool. This will show all your outgoing costs, and your profits. (providing you have set a markup)
- ⇒ Job Schedule Details – Here you can assign users to the estimate and arrange appointments. EG: Sales, Survey, Fitting, etc.

The Bay Calculator

One of the premium features of Profitmaker is the Bay Calculator. This enables you to accurately input your dimensions for a bay window. The program will calculate your baypole deductions, welded cill drawing, and display the finished bay from various angles for your customer.

To enter a bay click on “Bay Calculator” on the left hand side of the interface.

Select the style of bay you require from the list displayed:

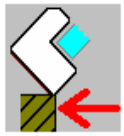
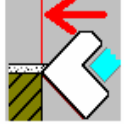


Next select the method you wish to use to calculate your bay:

Bay (Facets/Angles)		Bow (Base Line/Projection)	
Facet 1 width [mm]:	<input type="text"/>	Angle 1-2 [degrees]:	<input type="text" value="135"/>
Facet 2 width [mm]:	<input type="text"/>	Angle 2-3 [degrees]:	<input type="text" value="135"/>
Facet 3 width [mm]:	<input type="text"/>		



Unequal Facets

Bay (Facets/Angles)		Bow (Base Line/Projection)	
Base Line [mm]:	<input type="text"/>		
Projection [mm]:	<input type="text"/>		
<input checked="" type="radio"/> True Base Line			
<input type="radio"/> Brick to Brick Base Line			




Equal Facets


Enter your dimensions using one of the aforementioned methods. Please note that you must enter frame height at this stage or you cannot proceed. Transom drop and midrail heights should be left at the default settings, and amended at the frame level if required.


Next you should enter basic frame details in the interface to the right. These details are mostly cosmetic, as you can enter or alter specifications after your bay has been calculated.

Click on the next button to proceed to the bay wizard screen. Here you can drag and drop various styles of window onto your bay facets.

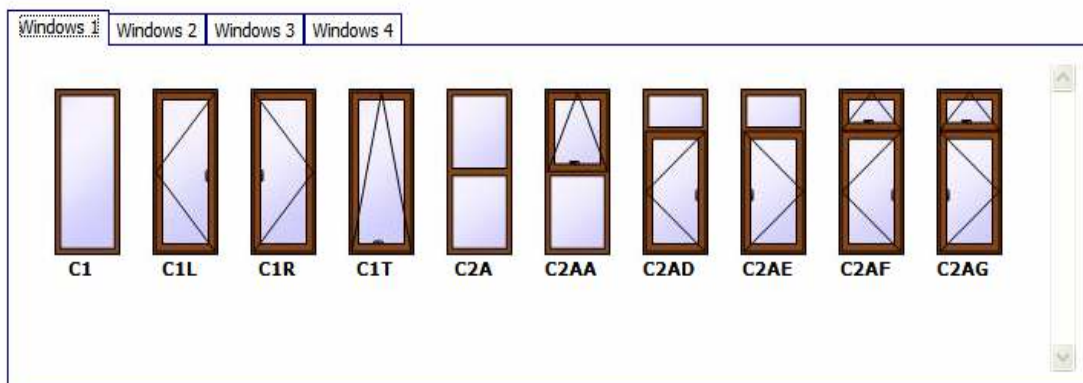


 Drop this element on a facet to add a segment

 Drop this element on a facet to remove a segment

 Drop this element to remove existing windows / doors

Rotate Bay



Note that you can select 2, 3, & 4 wide styles window styles by clicking the relevant tabs.


Click the “Next” button when you are happy with the style of your bay.

From the final screen you can create a new estimate for the bay, or add it to the estimate you are currently working in. This screen also gives you more detailed information such as facet sizes after baypole deductions, and a floor plan if required. These documents are available in a printable format if required.

Order Processing

We would encourage all users to process orders using Profitmaker. Simply convert an estimate to an order then go into the "Your Orders" section. Go into the order and select a desired delivery date. Then click on "Place Order".

Total Cost : **30.40** [Convert to Estimate](#) [Contribution](#) [\[Job Schedule Details\]](#)
[Apply Markup](#) [Order History](#)
 Markup Percent: [Delete this Order](#) [Print Document:](#)
 Extra Charge Per Item: [Copy this Order](#) [Document Set-up](#)
Marked Up Total: **85.05** **Place Order**

	Item	Product Code	Location	Width	Height	Quantity	Notes	Unit Cost	Cost
View 	1	C1		1000	1000	1		30.40	30.40

To add a new item to this Order press **Add Item**
 To view item details, press **View**
 To delete an item, press **View**, then press **Delete This Item**

The system will then prompt you to confirm the order by clicking here.

Customer Code: TestROI
 TestROI
 Address ROI

Place Order
 Order Number **26109**
 Required Date **23 August 2011**
 Delivery Date **23 August 2011**
 Order Value **30.40**
[Confirm Order](#)

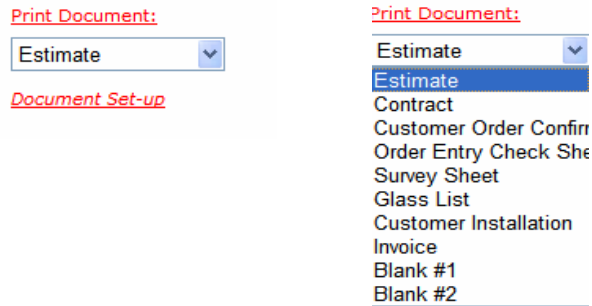
At this stage your order will be locked on the system, and an Email will be forwarded to Blair Neill. If you have replaced the Email in your customer setup screen with your own Email, then a confirmation will be sent to you. As always, a further confirmation will be sent pre production after your order has been thoroughly checked.

Order has been placed - Order Number
26109

Customer Code: TestROI
 TestROI
 Address ROI

Order Number **26109**
Required Date **23 August 2011**
Delivery Date **23 August 2011**
Order Value **30.40**

Document Printing/Customizing



Every estimate or job is linked to your unique set of printable documents. These documents can be selected from the drop down menu as shown above.

To print a document, simply select your choice and click on “Print Document”. This will open the document in another window of your web browser. You then print as normal, by clicking your web browser's print icon. The documents are set open in your web browser by default, but can also be modified to open in other formats such as Excel or Word.

PrimoPDF is a free downloadable program which works well with Profitmaker. This program allows you to create PDF documents for emailing estimates, etc.

Editing Documents

To edit any document, simply select the document then click on “Document Set-up”. This will take you to the Document Print Setup screen. Here you can fully customise your document to suit your individual needs. The possibilities are many, so we will only cover the basics of document editing. Should you require any further help, do not hesitate to contact Blair Neill for assistance.

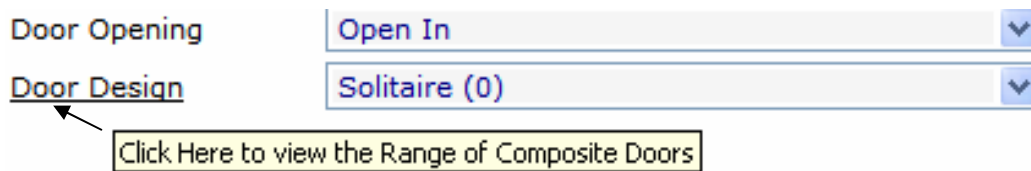
Any changes made can be previewed prior to saving by clicking on “preview”

To save an edited document, simply click on the “Save Current” of the relevant document. You can revert to the original default document by clicking on the “Load Default” of the document you altered. There are two blank slots that can be used to create new documents should the need arise.

User Defined Documents		
Estimate	Save Current	Load Default
Contract	Save Current	Load Default
Customer Order Confirmation	Save Current	Load Default
Order Entry Check Sheet	Save Current	Load Default
Survey Sheet	Save Current	Load Default
Glass List	Save Current	Load Default
Customer Installation	Save Current	Load Default
Invoice	Save Current	Load Default
Blank #1	Save Current	Load Default
Blank #2	Save Current	Load Default

Product Specific Limitations & Special features

- ⇒ 70mm A Rated glass – If selecting <A> rated Swiss Diamont glass, you will not be able to select obscure glass options, as this would eliminate the soft coat layer. This has been verified with our glass suppliers.
- ⇒ French windows are fitted with shootbolt espag locks and egress easy-clean hinges as default. These options cannot be changed.
- ⇒ The circle on French doors/windows indicates the main opener.
- ⇒ Vertical Sliders are supplied glazed only.
- ⇒ Composite door designs can be viewed by clicking on Door Design. This will link to the Blair Neill website, and open in a new browser window.



- ⇒ The default transom/mullion thickness on casement windows is 65mm.
- ⇒ The default transom/mullion thickness on tilt & turn windows is 65mm if the transom/mullion is in a sash, or between two fixed panes. If a transom/mullion is between a sash and a fixed pane the default is 85mm.
- ⇒ The default transom/mullion for all doors is 85mm, except when a 110 midrail is used.
- ⇒ The windows in the (Mids) section are designed with 110 midrail instead of the default 65mm transom.
- ⇒ Should you require a different size transom/mullion on a product, simply type your request in the comments box. Please note that new glass sizes will be required.
- ⇒ Stores can be added to the product or entered separately. If added to product, please note that no deductions are made to the window. The manufacturing sizes must be entered for each item. Stores added to products contain all parts. EG Dogbone Coupler will contain one steel & two covers.
- ⇒ At this time Profitmaker cannot provide glass sizes for any products in the Shaped Frame product section. Cream, black, and black/white patios also cannot generate glass lists. For any of these products you will need to contact Blair Neill for glass lists.
- ⇒ If you require equalised glass on a product, you will need to request this in the comments section when ordering.

Training & Support

Initial training is usually carried out by a Blair Neill sales rep. In some cases this may not be practical due to location or time constraints. In this case Blair Neill IT support personnel will phone you to talk through the initial setup.

As this is a new system it will take time to get used to the interface. Do not hesitate to contact us if you need help with any areas. We will periodically contact you to provide follow up information.

Should you require further training or support our IT support personnel are available Monday to Thursday 8.30am – 4.30pm, and Friday 8.30am – 1.00pm.

You may reach us by email or telephone.

02891 826868

stephen.hutchinson@blairneill.com

david.jeffers@blairneill.com

Profitmaker Development

As with any new system, there may be unforeseen errors which we need to address. While we are confident these will be minimal, if you discover any errors please inform us as soon as possible and we will respond.

With Profitmaker we have tried to anticipate all our customers' requirements for this first release, but should you think of something practical you would like added, then please contact us. We aim to accommodate all customer requests, and will review them thoroughly for Profitmaker's second release.

New window styles can be added quite quickly, but these must be styles that you expect to use on a regular basis. One off styles must be sent by fax or email to Blair Neill for processing.