

Printing, Fitting and Workroom Instruction

Go to the 'Sales Manager' tab

Select New/Search

www.windowizard.co.nz

Jeremy Page WindowOnLine LOG OUT

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Customers	Customer List					
New/Search						
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Time Management						
List						
Map						

Date		Name	Business	Address	Phone	Mobile	Email			
07/11/2014	225	Mr Ian Veint (1)	1	5 Kotzikas Place		0292001549	ian.veint@windoware.co.nz			
26/02/2015	244	Mr Ian veint		101 Tanner Street						
28/03/2011	1	Mrs Jeremy page		Three Springs Rd						
04/04/2011	15	Mr ian vient		97 Tanner St						
21/08/2013	144	Mrs Jenny Veint		97 Tanner Street						
20/02/2015	243	Mr Frank Brown		102 Tanner Street						
04/11/2014	221	Mr Steve Dougherty		34 Graham Place		021786129	steved@windoware.co.nz			
18/02/2015	242	Miss Tatiana Romanova (Russia With Love)	Russia With Love	22 Little John Drive	07555123		tatroma@dra.co.nz			
19/02/2014	195	Ms Kath Boyte		5 Kotzikas Place	0800262620					
22/05/2013	140	Ms Tricia Tawiri		5 Kotzikas Place	021841706					
09/02/2015	241	Ms Mary Goodnight		123 Cameron Road						
23/10/2014	219	Mrs Anni Bond		1234 Potter Street	0212113822		bond007@window.co.nz			
04/09/2014	210	Ms Tricia Tawiri				022 123 456				
23/10/2014	217	Miss Anni Bond		29 Dragon Street	021668383					
06/11/2014	222	Ms Tricia Tawiri		5 Kotzikas Place	0292001550					
03/11/2011	53	Mr Andy Grinder		Chesham Rd						
13/01/2015	238	Mrs Newbie Newb		1 Newb Street						
13/01/2015	240	Miss Keira Bloom		29 Dragon Street	021 211 3822	021 211 3822	kbloom@gmail.com			
30/03/2011	6	Mrs densie burson (Adobe Builders)	Adobe Builders	23 Muntai Crescent	03 8704327					
13/01/2015	239	Mr Andy Bond		10 Potzias Place	021 888 999	021 888 999	andy@windoware.co.nz			

Search for customer by entering last name and selecting the glass icon

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First Name

Surname

Address

Telephone

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Mobile

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Account Name Business

Notes

Search

New Lead

Save

Close

Select customer from the list

The screenshot shows the 'Details' form in Windowizard 2.0. The 'Surname Search' results list is displayed, with the first entry highlighted. An arrow points to this entry.

Surname Search: p	
• This is a new customer	
1.	Mrs Jeremy page, Three Springs Rd. (phone:) (mobile:) (email:)
23.	Mr Jeremy page, 5 Kotzikas Pl. (phone:) (mobile:) (email:)
31.	Mr jeremy page, 14 Arawa St. (phone: 03 345 6678) (mobile: 021 333 456) (email: jeremy@dra.co.nz)
41.	Mr Jo page, 14 Arawa St. (phone:) (mobile:) (email:)
43.	Ms Charlotte Page, Three Springs Rd. (phone:) (mobile:) (email:)
56.	Mr jeremy page, 5 Glebe Close. (phone:) (mobile:) (email:)
59.	Mr Joanne Page, 5 Glebe Close. (phone: 325 5152) (mobile: 021858515) (email: Jo_jeremypage@gmail.com)
60.	Mr Aimee Page, School Rd. (phone:) (mobile:) (email:)
97.	Mr Jeremy Page, 14 Cassidy avenue. (phone:) (mobile: 021858515) (email:)
100.	Mr David Page, 14 Arawa St. (phone: 03 6858174) (mobile: 021 858515) (email:)
101.	Mr Nigel page, 14 Arawa St. (phone: 021 985 321) (mobile:) (email:)
108.	Mr Jeremy page, 5 Kotzikas Pl. (phone:) (mobile:) (email:)

The customers information will come up, you are able to print of the documentation here

The screenshot shows the 'Details' form in Windowizard 2.0, with the 'History' tab selected. The 'Actions' column in the history table is circled, highlighting the print icon.

Type	Date	Job No	Consultant	Amount	Status	Supplier	Actions
Outstanding Proposal	20/02/2015	Test Chrome	andreim	\$1,529.90	Open		[Print] [X]
Cold Proposal	13/02/2015	test	karerj	\$0.00	Cold Error		[Print] [X]
Outstanding Proposal	02/12/2014	Test Fabric Swap	jeremy	\$1,086.36	Open		[Print] [X]
Outstanding Proposal	27/11/2014	test Fabric swap Wkroom	jeremy	\$1,140.00	Open		[Print] [X]
Accepted	24/11/2014	tracktest	jeremy	\$711.15	Closed		[Print] [X]
> Sale Order	27/11/2014			\$324.58	Planned	MCP New Zealand Ltd	[Print] [X]
> Sale Order	27/11/2014			\$149.51	Planned	MCP New Zealand Ltd	[Print] [X]

Windowizard - Fitting Instructions

[Download](#)

Tran Ref Date Store Name
tracktest 24 November 2014 Window Online Demonstration Account

Pick Up Address

Mrs Jeremy page
Three Springs Rd
Kimbell 7987
New Zealand

Installation Address

Mrs Jeremy page
Three Springs Rd
Kimbell 7987
New Zealand

Customer Contact

Mrs Jeremy page
Three Springs Rd
Kimbell 7987
New Zealand

Job Type


- ☐ Removal
☐ Fitting

Room/Window	Product Type	Fitting Instruction	No of Drapes	Stack	Track Type/ Blind Description	Track/Blind Width	Finish Length/ Drop	Header Size	Header Type	Blind Fit	Control Side	Hook Position
test 41set - test	Track Only			Centre Close	Topfix Mini Track	4550						
test 41set - test	Track Only			Centre Close	Square M System Single Track HD 60-70mm Bracket C/P	4550						
test 41set - w3	Blind V2				Roller Accendo	2000	1500			Inside	CC	
Room/Window	Product Type	Fitting Instruction	No of Drapes	Stack	Track Type/ Blind Description	Track/Blind Width	Finish Length/ Drop	Header Size	Header Type	Blind Fit	Control Side	Hook Position

Select the 'Orders' tab

'Saved Proposals'

Next to each customer name, all corresponding documentation can be printed



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My Orders & Proposals

Client Proposal

Place Orders

Order

MTM Track Order

MTM Blind Order

Edit

Saved Orders

Saved Proposals

Order Templates







































Freight

Freight Tracker

My Orders & Proposals

James Dunlop Textiles

Previous Proposals

Status	Copy	Consultant	Cust Name	Cust Ref	Date	Lines	Documents
✓		Steve Dougherty	Mr Steve Dougherty	SteveD	19 February 2015	7	     
!		Kath (MCP NZ Ltd)	Ms Kath Boyle	boyle/lynfords	18 February 2015	16	     
✓		Tricia (staff)	Ms Tricia Tawiri	GB	16 February 2015	2	     
✗		Jeremy Page	Mrs Jeremy page	test	13 February 2015	0	     
✓		Steve Dougherty	Ms Mary Goodnight	Mary Goodnight	09 February 2015	2	     
✓		andy g (Staff)	Mr Andy Grinder	rebuild	21 January 2015	2	     
✗		Ian Veint (MCP NZ Ltd)	Mr ian veint	test	20 January 2015	0	     
!		Gina (Staff MCP)	Mrs Newbie Newb	lounge v1	15 January 2015	8	     
✗		Anni Bond (Staff)	Miss Keira Bloom	New Build	14 January 2015	0	     
✗		Anni Bond (Staff)	Miss Keira Bloom	Bloom01	13 January 2015	0	     
✓		Anni Bond (Staff)	Miss Anni Bond	New Build	13 January 2015	10	     
✓		Gina (Staff MCP)	Mrs Newbie Newb	123	13 January 2015	5	     
✓		Gina (Staff MCP)	Mrs Newbie Newb	Newb 123	13 January 2015	6	     
✓		Steve Dougherty	Ms Pussy Galore	PG	12 January 2015	4	     

The order confirmation has the **Workroom Instructions** and **Fitting Instructions**

www.windowizard2.0

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MTM Track Order

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Order Confirmation

This proposal will produce the following orders:

Send	Save	Supplier	Type	Nett	Delivery Date	Reference	Address
<input checked="" type="checkbox"/>	<input type="checkbox"/>	James Dunlop Textiles	Fabric	\$332.45	02/07/14	house update	Jeremy JD
<input checked="" type="checkbox"/>	<input type="checkbox"/>	MCP New Zealand Ltd	MTM Blind	\$160.08	16/07/14	house update	Demonstration Account Only Christchurch New Zealand
<input checked="" type="checkbox"/>	<input type="checkbox"/>	MCP New Zealand Ltd	MTM Track	\$181.81	02/07/14	house update	Demonstration Account Only Christchurch New Zealand

Workroom InstructionsFitting InstructionsSend/Save

Warning! Freight, packaging, and/or handling charges maybe applied as directed by each suppliers terms and conditions