

## MINUTES OF SOFT TECH V6 USERS GROUP MEETING #40

Thursday 3 March 2011  
Soft Tech Australia Office, Sydney

Meeting opened 10.06 am

### Attendance

- Capral - Craig Johnson
- Alspec - Derek Neuschulz
- G.James - Mike Eccles  
- Shane Baker  
- John Staunton
  
- Micos - Jay Phillips
- Wunderbar - David Liorentas
- A&L (SA) - Steve Gillard
- Arch. Windows & Doors - James Anderson
- APL - Dan Rigg
- Rylock - Doug Andrews
- Hanssens - Jose Bautista
- Seaview Joinery - Shaun Forst
- Canterbury Windows - Lydia Amour-Naidoo
- Trend Windows - Joanne Celebrin  
Ray Schroder  
Suman Singh  
Chantel da Fonseca
  
- Soft Tech - Anne Coulter  
Kerry Williams  
Komal Limbad

### Apologies

- AWS (Vantage) - Michelle Sealey  
Alicia O’Ryan  
Renee Inglis
- Soft Tech - John Ball

## Soft Tech Update - John Ball

*Company Founder and Chairman*



John was unable to attend this meeting.

He was part of a NZ Government Conservation mission to the Auckland Island in the Sub-Antarctic undertaking a reconnaissance of the history township and its buildings.



### New Zealand Users

Welcome the addition of invitation to our New Zealand User base.

### New Major customer - ASA



- Significant Australian extruder
- Commercial V6 Database of framing suites underway
- ETA to market mid-2011

### New Customer - EcoClassic

- Melbourne based
- Double Glazing only.
- Aluminium, uPVC and Thermally Improved ranges

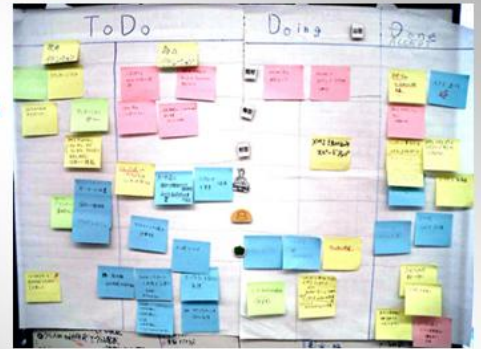


# Demonstration - Production Scheduling Module



## Challenges

- Complex Jobs
- Jobs Overlap
- Re-work
- Absenteeism
- Meaningful Reporting



**Komal Limbad**  
**Customer Sales & Support Consultant**

Komal provided a demonstration of our Production & Labour Scheduling systems which is used by 43 companies across New Zealand and Australia.

In particular Komal demonstrated our latest development which allows for bar code readers to scan the progress of jobs through the factory.

A detailed demo is available on our website - <http://www.softtech.com.au/products/pals.html>

Komal is available for a private demonstration via our internet meeting facility and is contactable via email on [komall@softtech.co.nz](mailto:komall@softtech.co.nz)



## The PALS Solution

- Automatic Scheduling
- Better Resource Utilisation
- Efficient Rework scheduling
- Improved Customer Service
- Management Reports

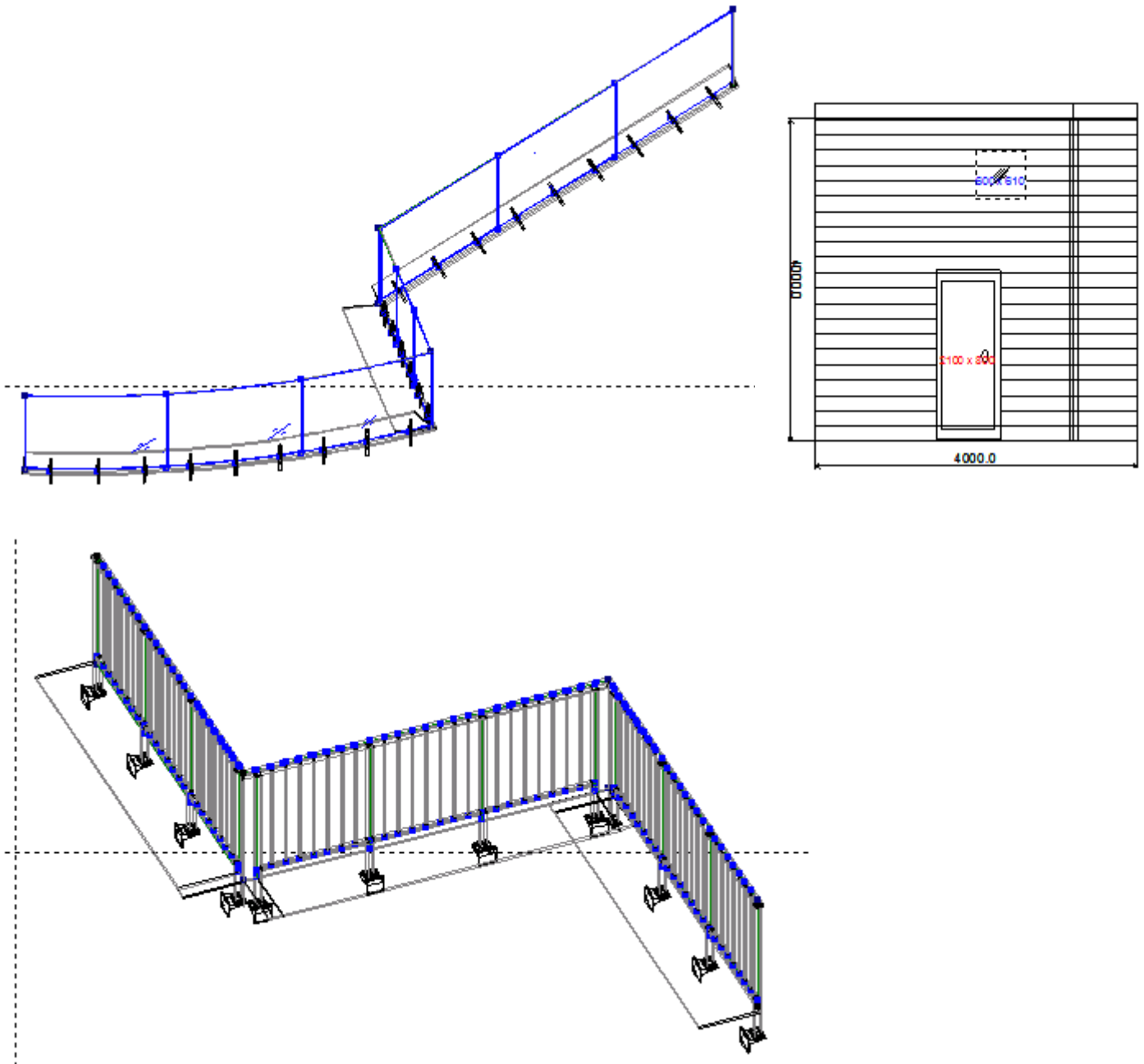


## Who uses PALS?

- Salesmen.
- Production Management
- Factory Staff



There was another demonstration of V6 database used for non-windows specific products - e.g. Balustrading, Louvres and House Cladding



## V6 Technical Update



Anne Coulter

### V6 Latest Versions

Current releases are –

2.10.1284	Aug 2008
3.20.0553	Sep 2008
3.30.0857	May 2010
3.40.1496	March 2011
3.50.1018	Nov 2010

[ftp://V6\\_Aus:zx81@ftp.softtechnz.com](ftp://V6_Aus:zx81@ftp.softtechnz.com)

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# Enhancement Requests – March 2011

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## 1. WERs table – remove unwanted data

**Agreed to submit**

There appears to be no ability to remove WERs data (either Glass or Frame) from the Resources to Associate.

There is sometimes test data which does not have a V6 database relationship – particularly where one can use separate databases for different products.

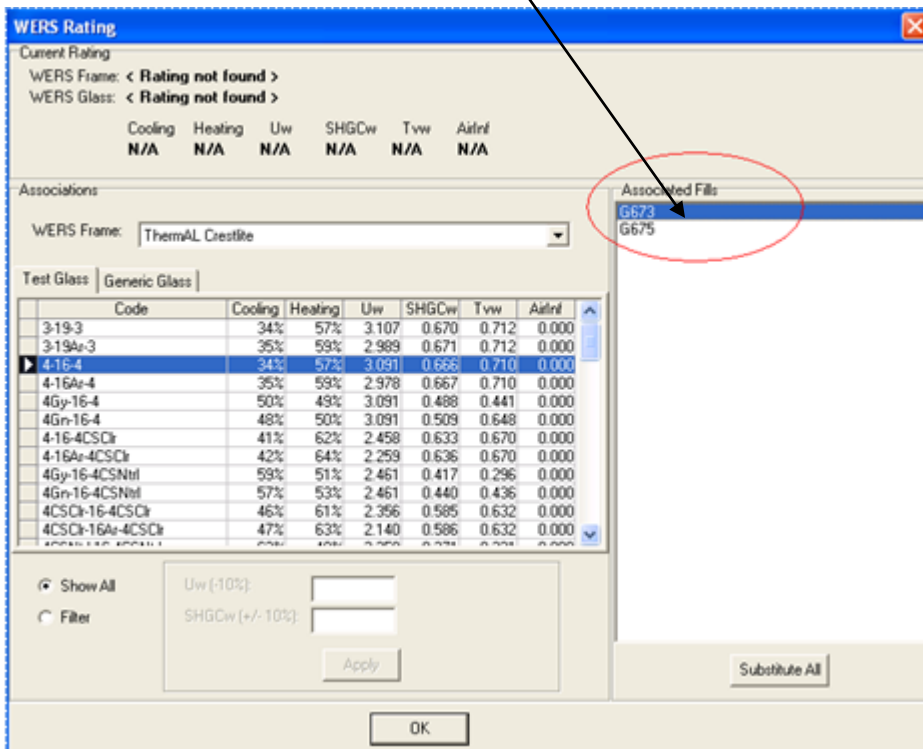
Can we have a Delete button?

Resources to associate	
<input checked="" type="radio"/> Glass	<input type="radio"/> Frame Type
<input type="radio"/> IGU	
Association Kind	
<input type="radio"/> Generic	<input checked="" type="radio"/> WERS Test
[-] <Show all glass>	
--- 6mm Clear (6Clr)	
--- 6mm EverGreen (6EG)	
--- 6mm SuperGrey (6SpGy)	
--- 6.38mm Saflex (638Sx)	
--- 6mm Energy Advantage (6EA)	
--- 6mm Azuria TS21 (6AzTS21)	
--- 6.38mm Comfort Plus Neutral (6.38CP Ntrl)	
--- 6mm Clear / 12mm Air Gap / 6mm Clear (6/12/2006)	
--- 6mm Grey / 12mm Air Gap / 6mm Clear (6Gy/12/6)	
--- 6mm Energy Advanatge / 12mm Air Gap / 6mm Clear (6EA/12/6)	
--- 6mm EverGreen / 12mm Air Gap / 6mm Clear (6EG/12/6)	
--- 6mm Clear / 12mm Argon Gap / 6mm Clear (6/12Ar/6)	
--- 6mm Grey / 12mm Argon Gap / 6mm Clear (6Gy/12Ar/6)	
--- 6mm Energy Advanatge / 12mm Argon Gap / 6mm Clear (6EA/12Ar/6)	
--- 6mm EverGreen / 12mm Argon Gap / 6mm Clear (6EG/12Ar/6)	
--- 6.38mm Saflex Clear Laminate (6.38Sx)	
--- 6mm Solarplus TS21 on Azurlite (6Az TS21)	
--- 6.38 Comfort Plus Laminate Neutral (6.38CPNtl)	
--- 6mm Sunergy Green (6SnGn)	
--- 6.38 Comfort Plus Laminate Green (6.38CPGn)	
--- 6.38 Comfort Plus Laminate Grey (6.38CPGy)	
--- 6.38 Comfort Plus Laminate Clear (6.38CPClr)	

## 2. WERs Glass Resource Descriptions

Agreed to submit

Could we have the glass (fills) description shown under WERs Associated Fills.



### 3. Glass Substitution – WERs

Agreed to submit

When substituting the glass via WERs, can the Glass Defaults options change to what has been selected?

See below.

Extrusion Finish Colors:  
1. BLACK (PAINT2)  
Fills:  
1(FSF). CLEAR  
2. 5CF  
3. 6.38CL  
PressureCode: C1  
Pu: 1500 N/m2  
Ps: 1000 N/m2  
DWP: 1000 N/m2  
Pw: 150 N/m2  
FrameLocation: N/A  
FrameSubLocation: N/A  
DistanceFromGL: 0 mm  
DistanceFromFL: 0 mm  
MaxMidSpanDeflection (LiveLoad): 180  
MaxMidSpanDeflection (DeadLoad): 3

**WERS Rating**

Current Rating  
WERS Frame: **Sample: Aluminium Sliding Window**  
WERS Glass: **4mm Clear**

	Cooling	Heating	Uw	SHGCw	Tvw	AirInf
	<b>33%</b>	<b>22%</b>	<b>3.103</b>	<b>0.583</b>	<b>0.378</b>	<b>2.81</b>

Associations  
WERS Frame: Sample: Aluminium Sliding Window

Test Glass | Generic Glass

	Code	Cooling	Heating	Uw	SHGCw	Tvw	AirInf
▶	<b>4CL</b>	<b>33%</b>	<b>22%</b>	<b>3.103</b>	<b>0.583</b>	<b>0.378</b>	<b>2.810</b>
	5CL	28%	34%	2.583	0.649	0.495	2.810
	6CL	40%	27%	2.585	0.532	0.347	2.810

Associated Fills  
4CF  
4O  
4GR  
4B  
4O  
4CS  
4GS  
4CS-VB  
4GS-VB  
4CS-VS

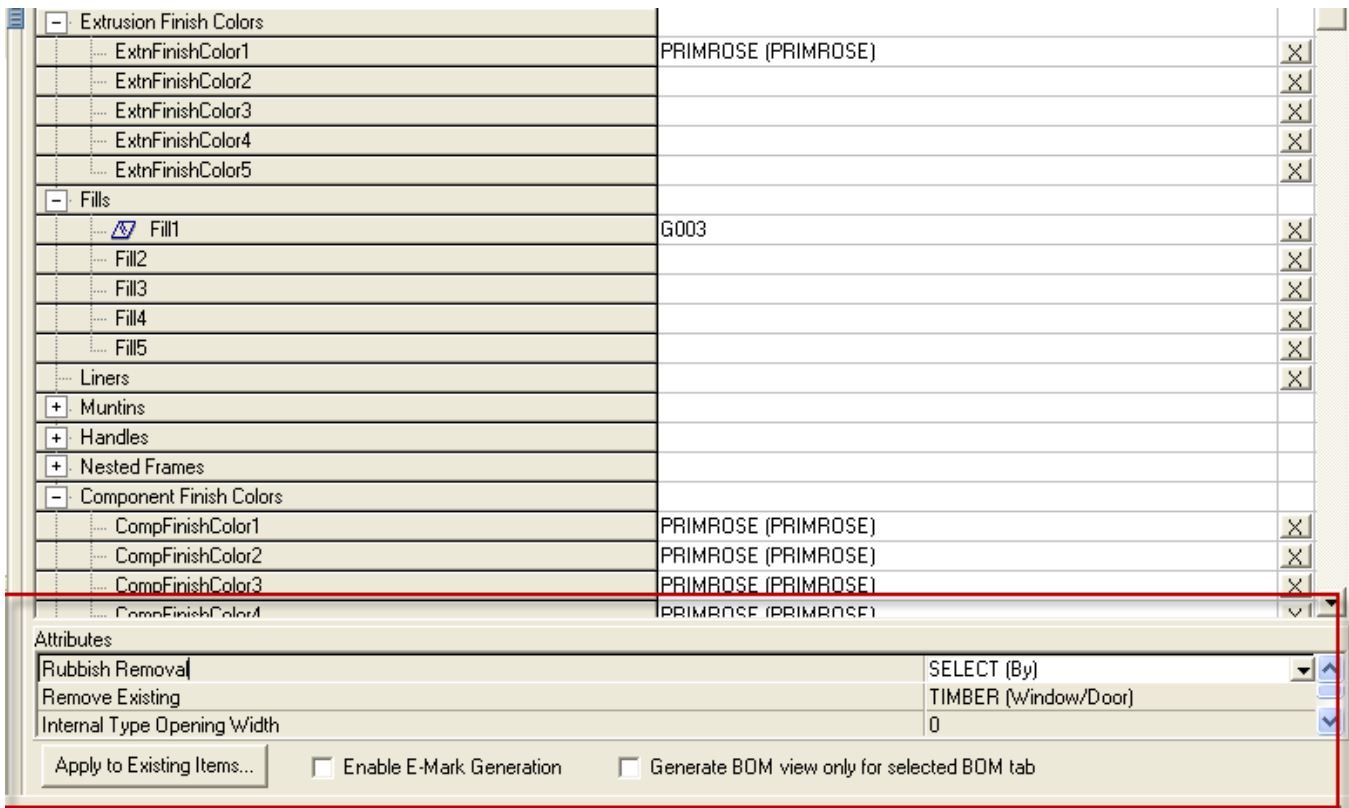
## 4. Quote Attributes – Associate with Process Group

**Agreed to submit**

Recently we have been using Quote Attributes (located on the Quote Default Tab) for a specific design Macro in V6.

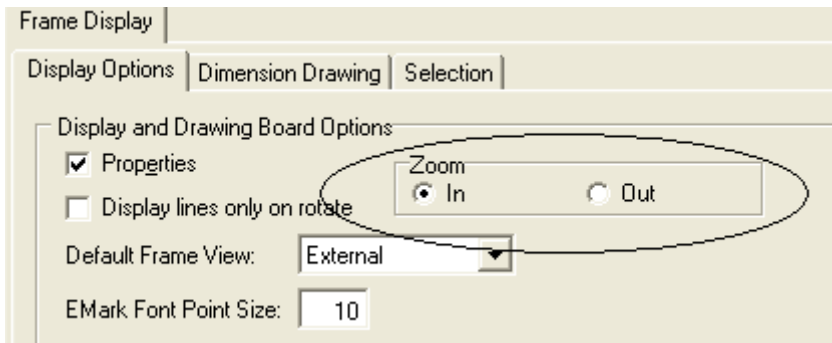
The Attributes and the Macro refer to one specific library of our products.

We would like to see Quote Attributes associated with a process group to only allow certain users to see these Attributes.



## 5. Setup Option – Zoom IN /Zoom OUT

**Agreed to submit**



Currently this setup option (frame display) applies to all resources (extrusions, assemblies etc) not just frames.

The system also applies the same setting to library frames as well as 'quotation' frames.

We have the option set to 'Zoom in' as this suits the users who are working on quotations.

However, when doing development (especially when working on resources other than frames) I spend a lot of time manually 'zooming out', as I want to change things other than the design.

Can we please have separate settings for resource editing and quote editing?

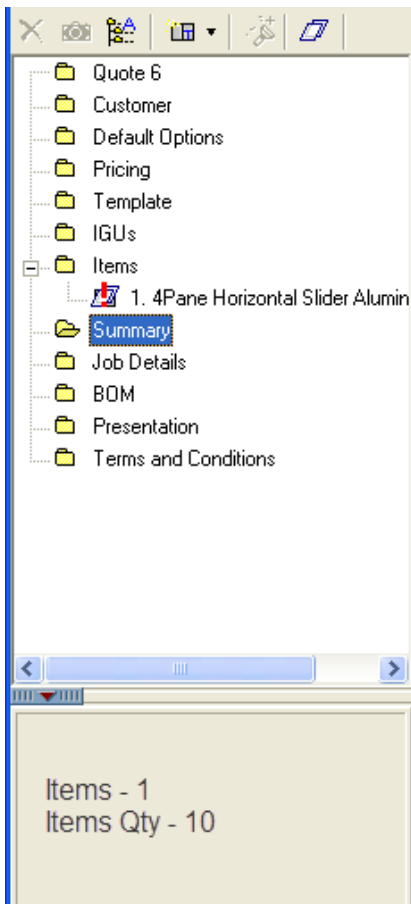
It would be even better if the setting could be toggled (for resource editing only) so that the developers can choose what they want to happen without having to change a setup option.

## 6. Quote Item / Window Quote

**Agreed to submit**

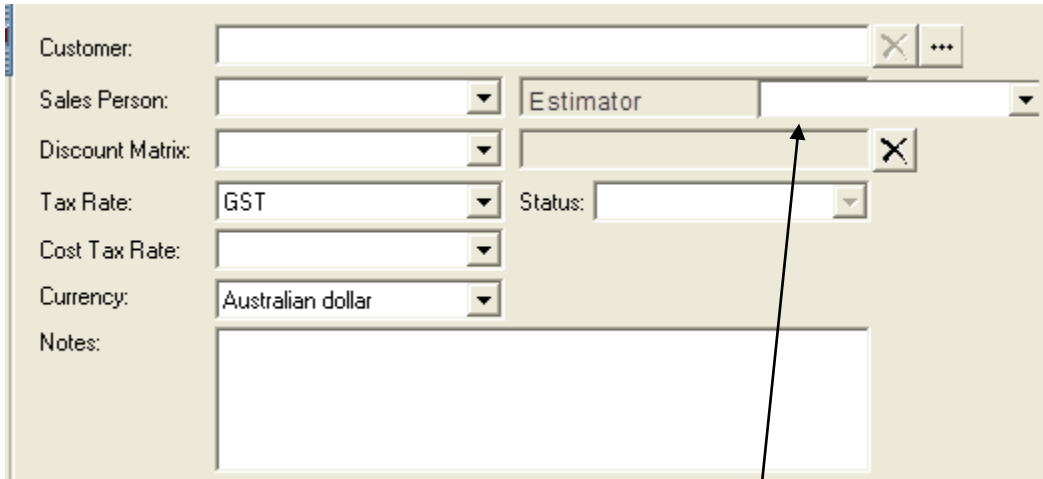
Could we have a display of the quote Item count as well as the multiple quantities of window?

This could possibly be in the summary tab or a running total down the bottom.



## 7. Salesman and Estimator Field

**Agreed to submit**



The image shows a screenshot of a software form with the following fields:

- Customer: [Text field]
- Sales Person: [Dropdown menu]
- Estimator: [Text field]
- Discount Matrix: [Dropdown menu]
- Tax Rate: [Dropdown menu, value: GST]
- Status: [Dropdown menu]
- Cost Tax Rate: [Dropdown menu]
- Currency: [Dropdown menu, value: Australian dollar]
- Notes: [Text area]

An arrow points from the text below to the Estimator field.

Could we have a field available for the Estimator as well as the current Salesman field?

At most of our sites the sales rep. is different from the estimator.

This would make it easier to capture information around how much was quoted and by whom.

This field should also be available to add to the Quote Browser Setup Option

## 8. Quote/Customer/Pricing - together on one screen

**Agreed to submit**

When entering a new quote we would like to see the Quote Customer & Pricing all on the one screen.

At the moment there is very little info on each tab and to have this in one place would be easier for the end user to follow – not 3 places.

The screenshot displays a software application window with a menu bar (File, Sales, Factory, Resource, Quote, Reports, Comms, Setup, Window, Custom, Help) and a toolbar. A left-hand navigation pane lists various modules: Quote, Customer, Default Options, Pricing, Template, IGUs, Items, Summary, Job Details, BOM, Presentation, Terms and Conditions, and Resource Overrides. The main workspace is titled 'Header' and contains several data entry sections:

- General:** Fields for Quote Number, Quote Version (1), Title, Comment, Shipping Lead Time (0), and CKD Quote checkbox.
- Dates:** Fields for RFQ, Quoted (23/02/2011), Delivery (23/02/2011), Closed, Effective (23/02/2011), and Modified.
- User Defined Fields:** Fields for 1st Accepted Date, 1st Pending Date, and BOSS UDF.
- Pricing Options:** Checkboxes for Component Pack Roundup, Full Bar Roundup, Apportion Waste to Cutpieces, Roundup Labour Template Time, Defer Calculations, and Defer Pricing.
- Quote Default Price Group:** Fields for Library (APL) and Code (20).
- Customer:** Fields for Customer ([ . SC ] Valued Customer), Sales Person (benny), Discount Matrix, Tax Rate (GST), Status, Cost Tax Rate, and Currency (New Zealand dollar).
- Address information:** Fields for Contact Name, Address 1 (New Address), Address 2, City, State / Province, Zip / Postal Code, and Country.

An alternative layout suggestion from another user is —

General

Quote Number: MRE 405473 Quote Version: 8

Title: FRONT UNITS, LEVEL 1

Comment: IPS 25/06/11 REVEALS ONLY A GUESS THEY NEED TO BE CHECKED

Shipping Lead Time: 0  OKD Quote

Quote Status: Quote Copy Invoice Mark

Customer: 25321 LES MCCDERMOTT HOMES P/L

Sales Contact: JOHNID John Stanton

Discount Matrix

Tax Rate: GST Status: Current

Cost Tax Rate

Currency: Australian dollar

Notes

Address Information

Contact Name: LES MCCDERMOTT HOMES

Address 1: PO BOX 8416

Address 2:

City: MOUNT PLEASANT QLD

State / Province: QT48

Zip / Postal Code:

Country:

Phone:

Fax:

Sell To / Ship To / Charge To

Dates: RFG: 25/06/2010 Quoted: 27/06/2010 Delivery: 27/06/2010 Closed: J / Effective: 25/06/2010 Modified: 14/12/2010

Use Defined Fields: Customer Ref: PO 12245 Building Class: Tie Single Dwelling In Tender System: Original Quote No: 405160

Cost Price	\$4,571.75
Overhead	\$1,382.23
Markup	\$3,197.48
Gross Selling Price	\$9,460.96
Item Discount	\$1,944.59
Price Adjustment	\$1.53
Net Selling Price before Tax	\$7,515.40
GST	\$702.54
Selling Price including Tax	\$8,217.94
Total Selling Price	AUD \$8,217.94

Pricing Options:  Component Pack Roundup  Full Box Roundup  Application Write to Outpieces  Direct Calculations  Defers Pricing

Quote Default Price Group: Library: JAMES Code: RES\_EXT

Quote Labour Mechanism: Labour Bgn Only

Quote Labour Weighting Factor: 1.80

Apply Quote Extrusion Finish Rates

## 9. Audit Trail

**Agreed to submit**

Based on some recent investigations, it appears that approx 95% of the entries in the audit trail on our system consist of changes made to the frames used in quotations, not changes to library frames.

While some of these are genuine changes made by the user, most of them are generated by the system automatically, by such things as applying the glass selected.

In an average month, these 'automatic' changes add up to approx 450000 entries, which serve no useful purpose, especially in a multi-user system.

I should like to propose a change to what data the audit trail collects for quotes.

I do not think that any change is required to the audit trail in regard to library resources - any changes to these should go into the audit trail.

In most databases, I believe that there would not be a significant number of these in any case (except for mass price changes etc).

<b>Audit Trail Report</b>						
Date From : 28/02/2011 to : 28/02/2011						
Date	Time	User / Workstation Lib Code	Resource	Code	Action	
28/02/11	14:23:23	Admin / AnneCoulter@ANNED1 Quote Library	Frame	PH REPLACEMENT~1854	No Action	
28/02/11	14:23:25	Admin / AnneCoulter@ANNED1	Quote	66	Editing	
28/02/11	14:23:25	Admin / AnneCoulter@ANNED1 Quote Library	Frame	PH REPLACEMENT~1854	No Action	
28/02/11	14:23:26	Admin / AnneCoulter@ANNED1 Quote Library	Frame	AW1212~329	No Action	

The changes I propose are:

- Create an entry for any change to the quote as a whole (add, edit, delete, copy etc) - as now
- Optionally, create an entry for any change to an item (add, edit, delete, copy etc).
- Optionally, create an entry for any frames changed by the user (if this is possible).
- Exclude any changes made to a frame simply by applying quote options/attributes.

## 10. Glass Type for Mesh

**Agreed to submit**

Can we create a method for adding Mesh, Security, Crimsafe type products into Glass but avoid them being selectable by the glazing wizard, AS1288 etc.

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### Next meeting

**Thursday, 2 June 2011 (10am)**  
**To be held at –**

**Soft Tech Australia P/L**  
**10 Warby Street**  
**Campbelltown NSW 2560**