



V₆

SETUP MANUAL

Getting Started Steps	3
SETUP OPTIONS – BUSINESS RULES	
BOM Data	6
Company	7
Costing	8
Cutting List	9
Measurement	10
Quote	11
Quote Display	12
Quote Tree	13
1. Glass	
1.1 Pricing Glass	15
1.2 Add New Glass	17
1.3 Deleting Glass	24
1.4 Add New Glass Families	25
• 1.4a Add new Glass Classification	26
• 1.4b Add new Families for Glass	28
2. User Library	
2.1 General	32
2.2 Create new Supplier	33
2.3 Create new Components	35
2.4 Create new Frames	40
3. Labour	
3.1 General	44
3.2 Updating Labour Values	45
4. Quote Families	
4.1 General	48
4.2 Create Quote Families	49

Step 1

Business Rules – SETUP | OPTIONS

- BOM Data
- Company
- Costing
- Cutting List
- Measurement
- Quote
- Quote Display
- Quote Tree
- User Defined Fields

Step 2

Glass Codes – RESOURCE | GLASS

- Enter Glass sq/m costs
- Add new Glass Codes
- Edit existing Glass Codes (if coding isn't appropriate)

Step 3

Add Labour Rates and Codes - RESOURCE | LABOUR

- Update Labour Values

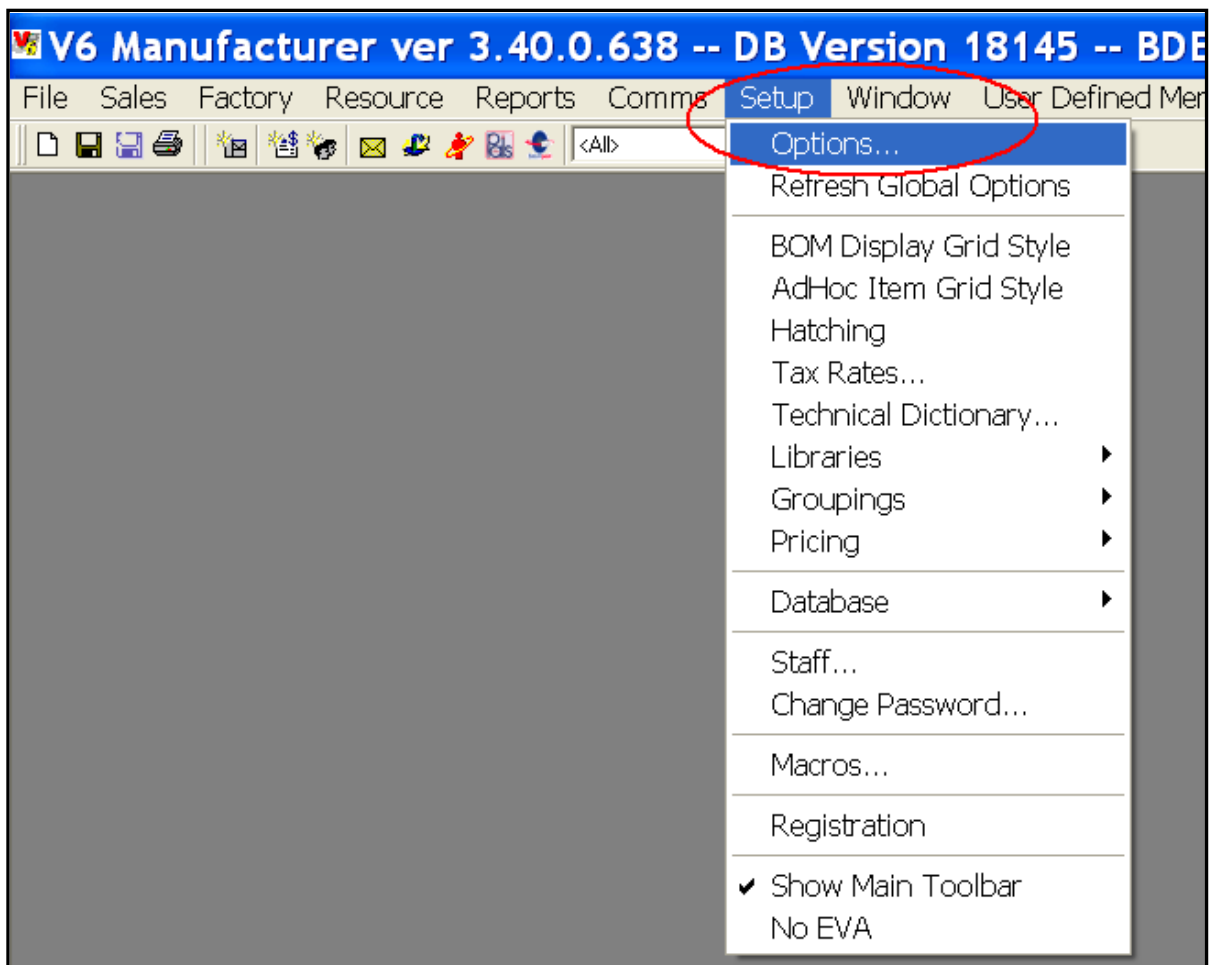
SETUP Options (Business Rules)

VERY IMPORTANT

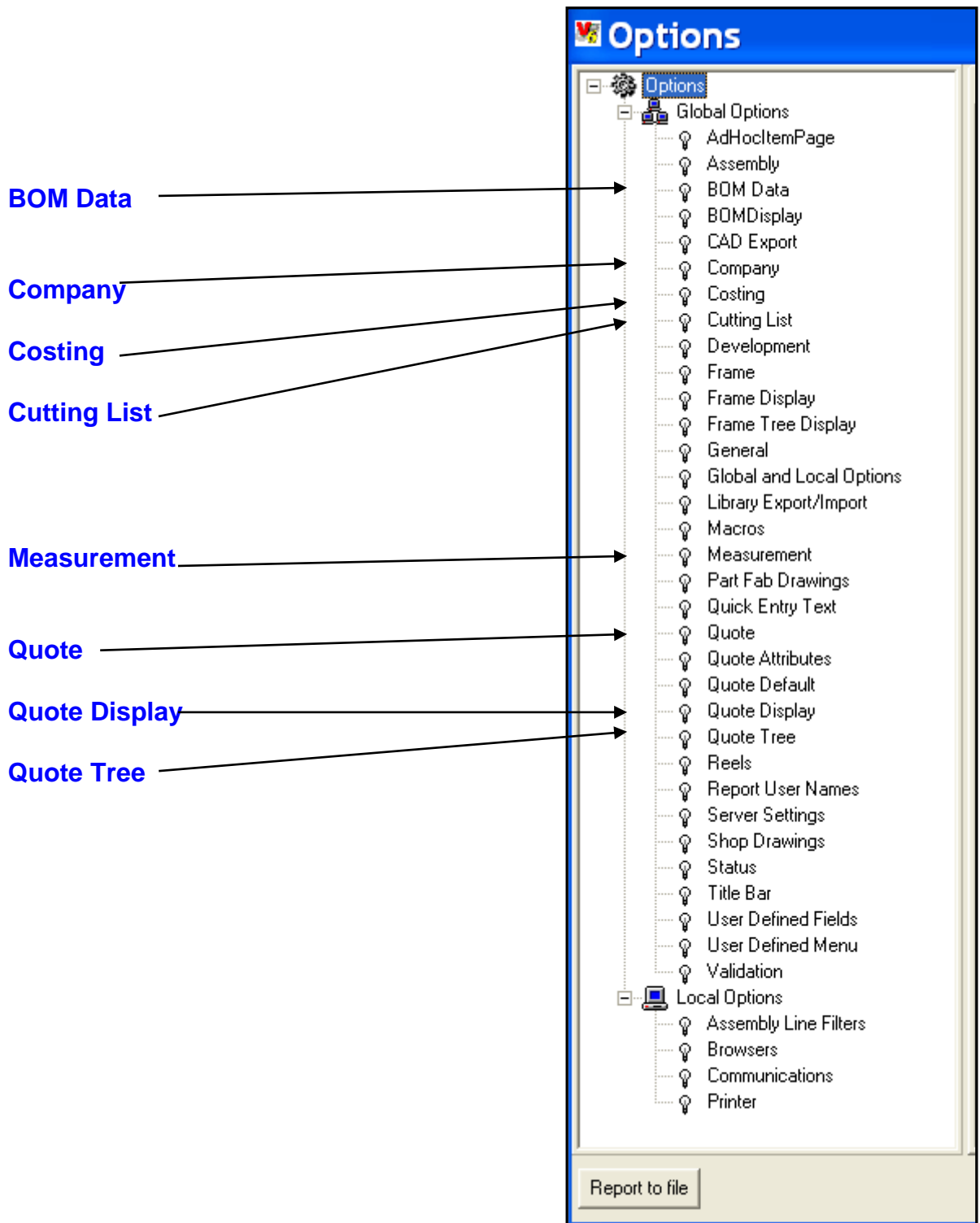
Various Setup Options need to be considered and edited to suit your circumstances BEFORE proceeding further with any of the other aspects of the V6 Estimator™ system.

These Options control how V6 will cost your quotes, which aspects of pricing you wish to have displayed, which optimisation method you wish use, etc...

Depending on the operating system on your computer the screenshots displayed in this documentation may not necessarily be exactly the same as you see on your computer.



The important **SETUP OPTIONS** for the **PRESS METAL** database are considered to be –



The screenshot shows the 'Options' dialog box with a tree view of settings. Arrows point from the following labels to their corresponding options in the list:

- BOM Data** points to 'BOM Data' in the Global Options list.
- Company** points to 'Company' in the Global Options list.
- Costing** points to 'Costing' in the Global Options list.
- Cutting List** points to 'Cutting List' in the Global Options list.
- Measurement** points to 'Measurement' in the Global Options list.
- Quote** points to 'Quote' in the Global Options list.
- Quote Display** points to 'Quote Display' in the Global Options list.
- Quote Tree** points to 'Quote Tree' in the Global Options list.

The 'Options' dialog box contains the following items:

- Global Options**
 - AdHocItemPage
 - Assembly
 - BOM Data
 - BOMDisplay
 - CAD Export
 - Company
 - Costing
 - Cutting List
 - Development
 - Frame
 - Frame Display
 - Frame Tree Display
 - General
 - Global and Local Options
 - Library Export/Import
 - Macros
 - Measurement
 - Part Fab Drawings
 - Quick Entry Text
 - Quote
 - Quote Attributes
 - Quote Default
 - Quote Display
 - Quote Tree
 - Reels
 - Report User Names
 - Server Settings
 - Shop Drawings
 - Status
 - Title Bar
 - User Defined Fields
 - User Defined Menu
 - Validation
- Local Options**
 - Assembly Line Filters
 - Browsers
 - Communications
 - Printer

A 'Report to file' button is located at the bottom of the dialog box.

■ Bill of Materials

1. ALWAYS SAVE BOM must be ticked for commercial quotes which use Full Bar Roundup

2. SAVE BAR CUTS INFORMATION is needed if you wish to run the secondary Optimisation report

BOM Data

Bill of Materials:

- Always Save BOM Generate BOM on quote status:
- Save Reference Point Information
- Save Bar Cuts Information Set Bag Res ObjID to Parent
- Populate BOM_FRAME_LINK table
- Populate BOM_FRAME_OPTION table
- Include waste in Bom cost?
- Purge BOM Records on Startup for Quotes Older than Days

Add Attributes to Bom for:

- Assembly Fill Milling
- Extrusion IGU Component

Save Frame Images:

- Save Frame Image to BOM_FRAME_LINK Level of Nesting to Save:
- Always Save Frame Images Save Image Status:
- Frame Image (Pixels): Width: Height:

Save Fill Images:

- Save Fill Images to BOM_FILL_LINK
- Fill Image (Pixels): Width: Height:

This is where your company details, terms and currency should be entered.

Company

General

Site Name:

Company Name:

Telephone: Fax:

Address:

Terms and Conditions

Use in Quote

Currency

ISO	Currency	Example
036	Australian dollar	\$ 12,345.67
124	Canadian dollar	\$ 12,345.67
826	Pound sterling	\$ 12,345.67
840	US dollar	\$ 12,345.67
978	Euro	\$ 12,345.67

Default Currency:

Click APPLY and then OK once you have entered your company details

■ Extrusion Full Bar Roundup.

If ticked, all extrusions within your Quotes will be costed based on the number of Full Bars required based on optimisation. If unticked, all extrusions will be costed at cost size plus wastage.

■ Waste percentages

Some wastage percentages should be added here for glass and componentry. Extrusions should also have a percentage to cover for quotes which are costed at the extrusion cut sizes (instead of Full Bars).

■ Quote labour Mechanism

This should be set to Labour Bags only.

■ Kerf

This refers to the saw thickness that is a factor in the optimisation routine. This can also be changed individually on extrusions against various finishes.

■ End Trim

This refers to the amount of wastage assigned to the ends of each Full Bar during the optimisation routine. This can also be changed individually on extrusions against various finishes.

■ Bar lengths

This should be set to Standard as the PRESS METAL database does not provide any Special Full Bar lengths.

The screenshot shows the 'Cutting List' dialog box with the following settings:

- Cut Angles:** Show: Both; Measure: From end (Square=0); Report reversed cut angle when the extrusion is flipped (old style)
- Saw Settings:** Kerf: 5.00; Kerf Angle: 5; End Trim: 25.00
- Range of Bar Lengths:** From: 3000.00; To: 10000.00; Step: 500.00
- Optimizer (Alternative):** Algorithm: Saw Man Logic; Bar Lengths: Standard; Limit Special Lengths to 1; Multiple Lengths; Extra Optimization; 5.00 % Criteria
- Curved Extrusions:** Always Round Up to Bar Length; Use Actual Curve Length
- Oversize Cutting Method:** Equal Bar Length; Maximum Bar Length; Disable With Range Optimisati

Buttons at the bottom: OK, Cancel, Apply, Restore

■ Measurement Units

Please ensure this is set to Metric NOT Imperial

■ Precision

1. Input – refers to the degree of precision you wish to use when nominating the position of a bar.

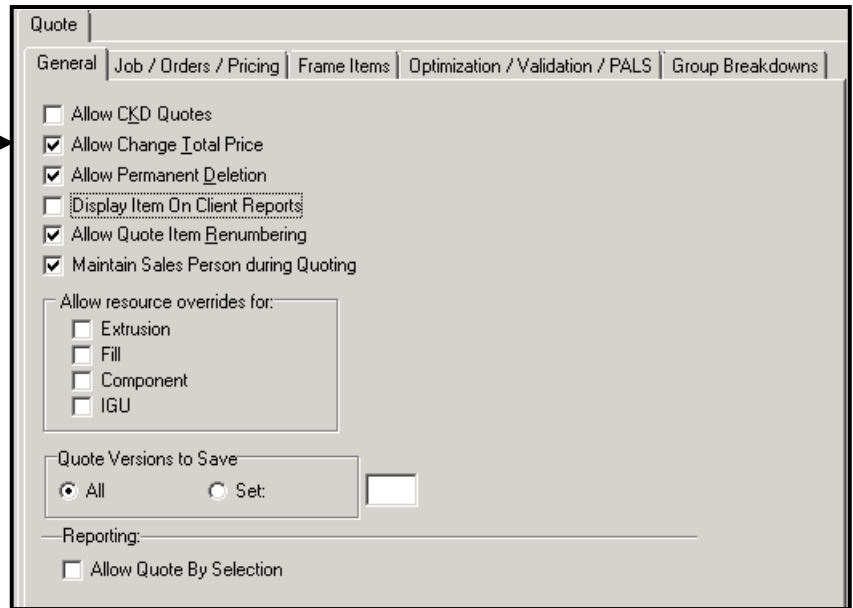
2. Cutting List – refers to the degree of precision you wish to see on the SCREEN cutting sizes for Extrusions.

N.B. This does not necessarily refer to PRINTED cutting sizes which are normally dependant on how the report has been designed.

■ Allow Change Total Price

If ticked it will allow you to change the QUOTE Total Selling Price on the Summary Tab.

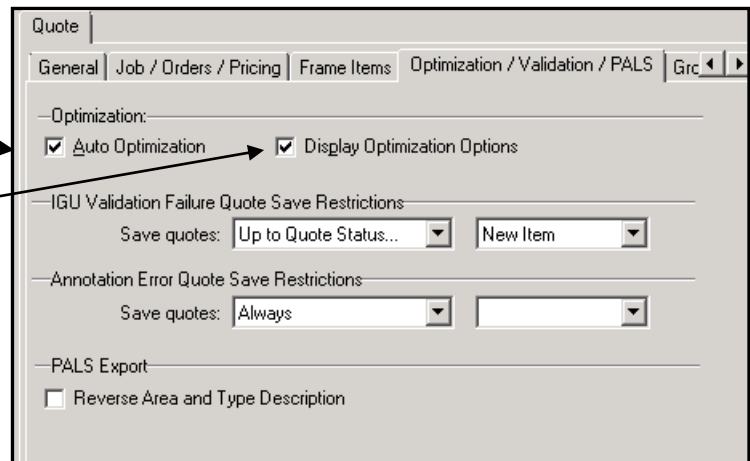
This will then allow you to calculate the percentage of adjustment you require



■ Optimisation

1. **Auto Optimisation** MUST be ticked for Commercial quotes which use Full Bar Roundup.

2. **Display Optimisation** (if ticked) will allow you to alter the method of optimisation within each individual quote.



Quote Display

■ Item / Summary Tab

The prices which are ticked here will be those which are displayed on both the Item Tab and the Summary Tab of a quote.

Quote Display

Visible Fields

Header Tab

UDF3 UDF5 Delivery Date Default to Today

UDF4 UDF6

Pricing Tab

Roundup Checkboxes

Labor Mechanism

Price Overrides

Quote Finish Rates

Job Details

UDF7

UDF8

Quote Classification

Apply Minimum Fill Cost Area

Item / Summary Tab

Cost Price

Cost Tax

Overhead

Markup

Gross Selling Price

Discount

Sales Commission

Price Adjustment

Net Selling Price

Sales Tax

Selling Price including Tax

Total Selling Price

Overhead percent

Markup percent

Locked Gross Selling Price Adj.

Discount percent

Sales Commission percent

Separate Labor Cost

Unrecoverable waste

Quote Editor

Front Tab on Entry: Disable quick save

Cost Precision

Decimal Digits in Cost

Free Hand Item

Disable Free Hand Item

Disable Edit Free Hand Item

Allow Default Discount for Free Hand Item

Apply Tax Free Hand Read Only

Apply Tax Free Hand Default

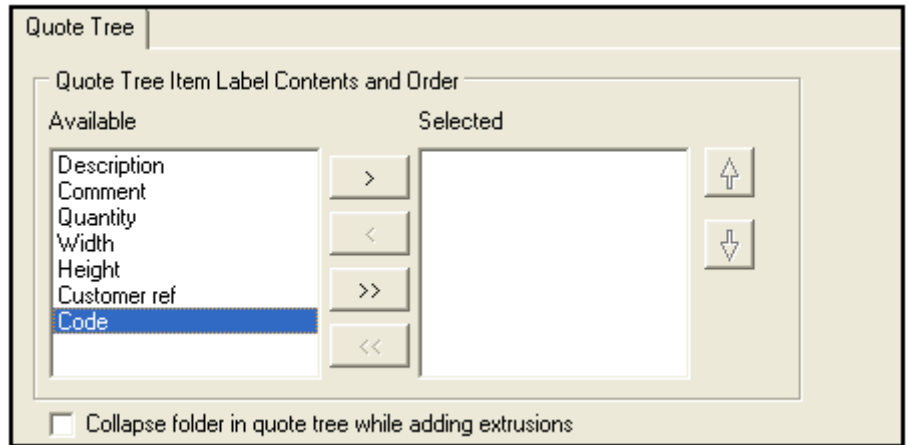
OK Cancel Apply Restore

Quote Tree

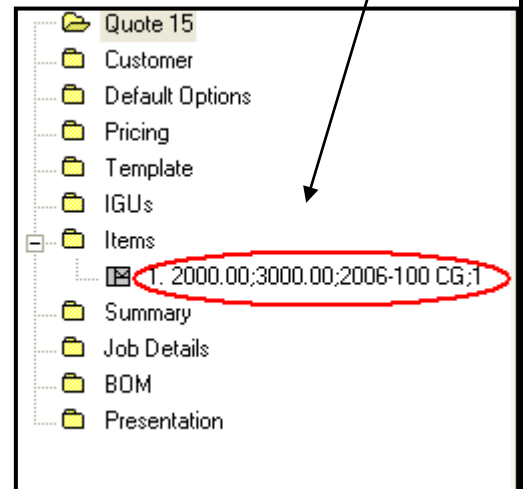
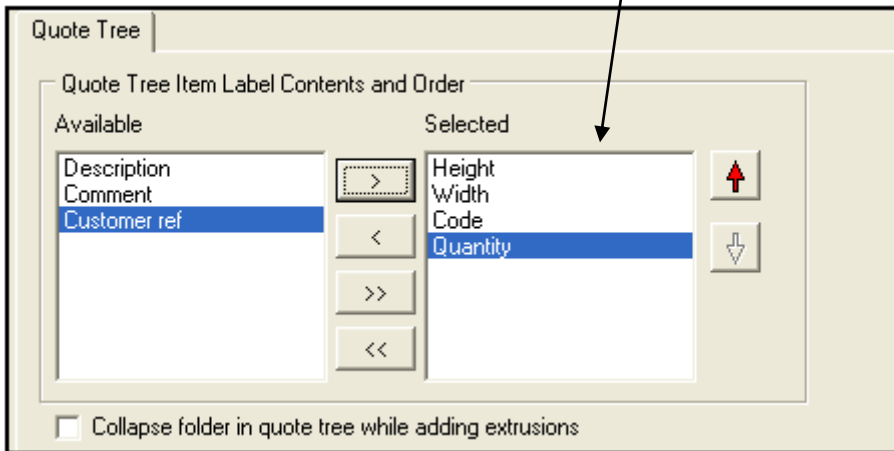
The Quote Tree decides which information about a Quote Item is displayed on the Quote Tree.

The information available is

- Description of the Item
- Comment entered by the user
- Quantity of the Item
- Width
- Height
- Customer Reference
- Frame Code



By making the following selections on the RIGHT HAND SIDE, the Quote Tree would appear like this.



Item 1 has - **Height** = 2000 **Width** = 3000 **Code** = 2006-100 CG **Quantity** = 1

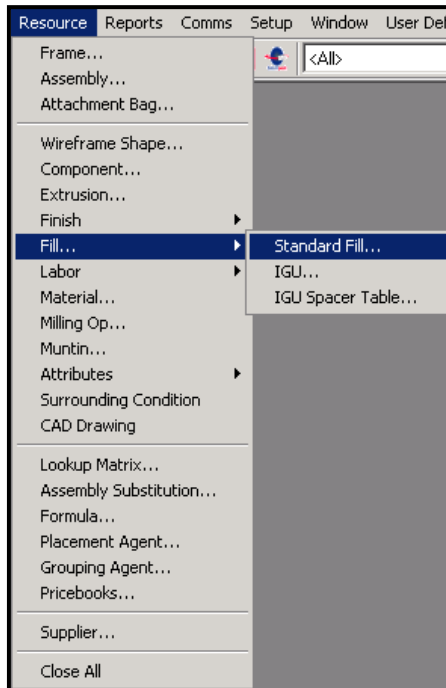
Glass

1. Glass

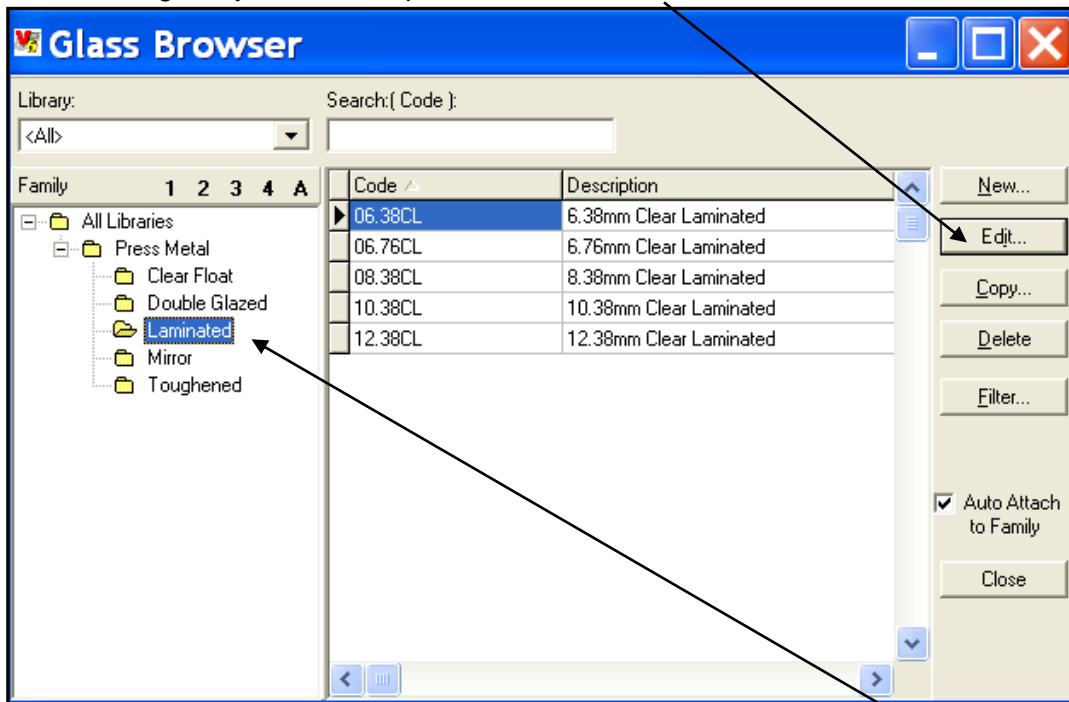
1.1 Pricing Glass

Glass prices are not provided with your database.

Open the Glass Browser by clicking on the **Resource** drop-down menu, then **Fill > Standard Fill**.



Choose the glass you wish to update and click **Edit**.



The Glass has been separated into relevant **Families** (Groups) on the **Left**.

1. Glass

1.1 Pricing Glass (continued)

Then go to the **Supplier** tab.

Supplier: [GLASS] Glass Supplier

Order
Supplier Lead Time: 0 days Do not order

Tint
Finish Group:

Cost per m2
Currency: Australian dollar Use Single Glazing Costs for IGUs
 Apply Minimum cost area

	Double Glazing	Triple Glazing
Last In:		
Standard:		
Price A:		
Price B:		

Calculations
Cost: Entered Cost
Price (sold in frame): Cost + O/H + Markup
Price (sold individually): Cost + O/H + Markup

OK Cancel Help

Enter your Price per Square Metre in the **Last In:** Field

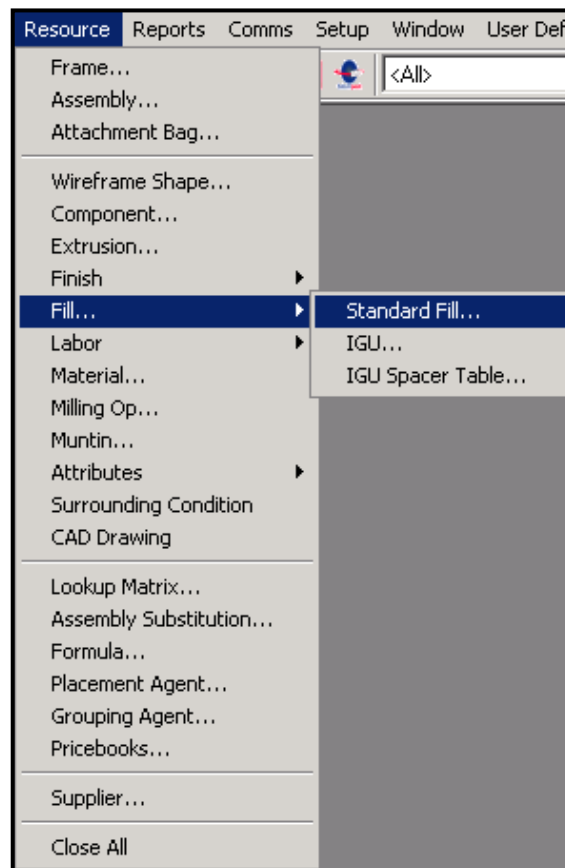
Click on **OK** and the Glass price will be updated.

1. Glass

1.2 Add New Glass

You may add as many extra Glass codes as you wish into the PRESS METAL database. However, it is a good idea to add them into the **User Library** so that they are not affected by any updates provided by your supplier.

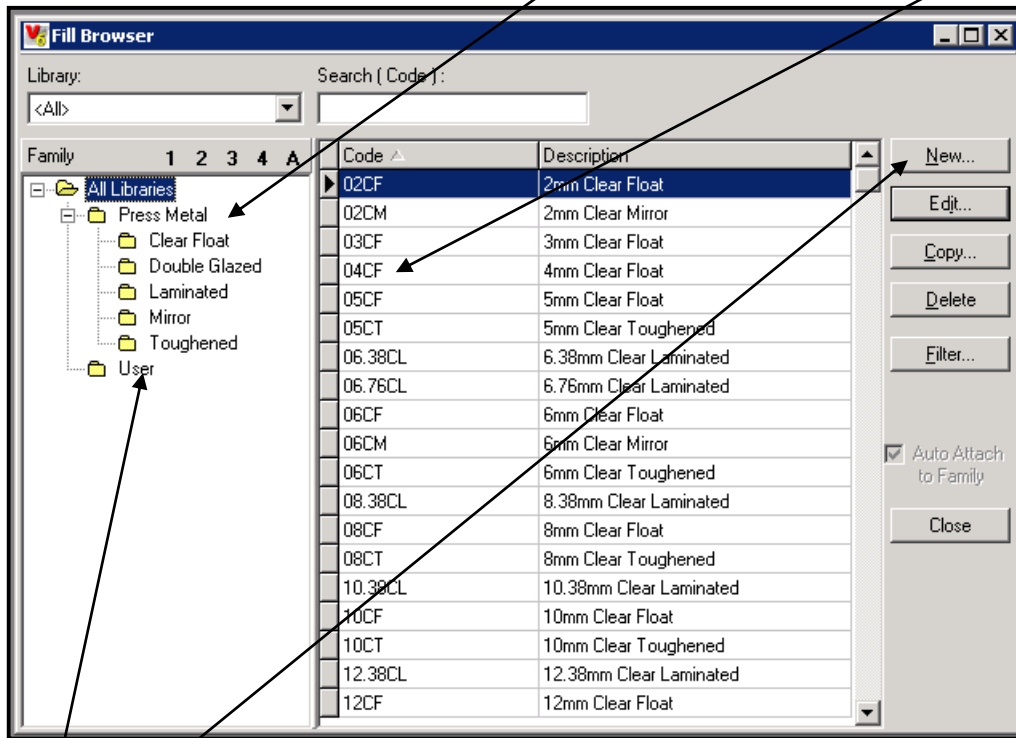
Go to the **RESOURCE** drop-down menu, then **FILL > STANDARD FILL**



1. Glass

1.2 Add New Glass (Continued)


The **Fill Browser** will appear showing the existing Glass **Families** (Groups) and the Glass **codes** which belong to these Families.



Click on **USER** then **NEW** to create a new Glass code

1. Glass

1.2 Add New Glass (Continued)

Firstly nominate the appropriate Family which this new Glass Code will belong to. This is selected by clicking on the  box on the **Classification** field.

The screenshot shows the 'Fill Editor' dialog box with the following fields and options:

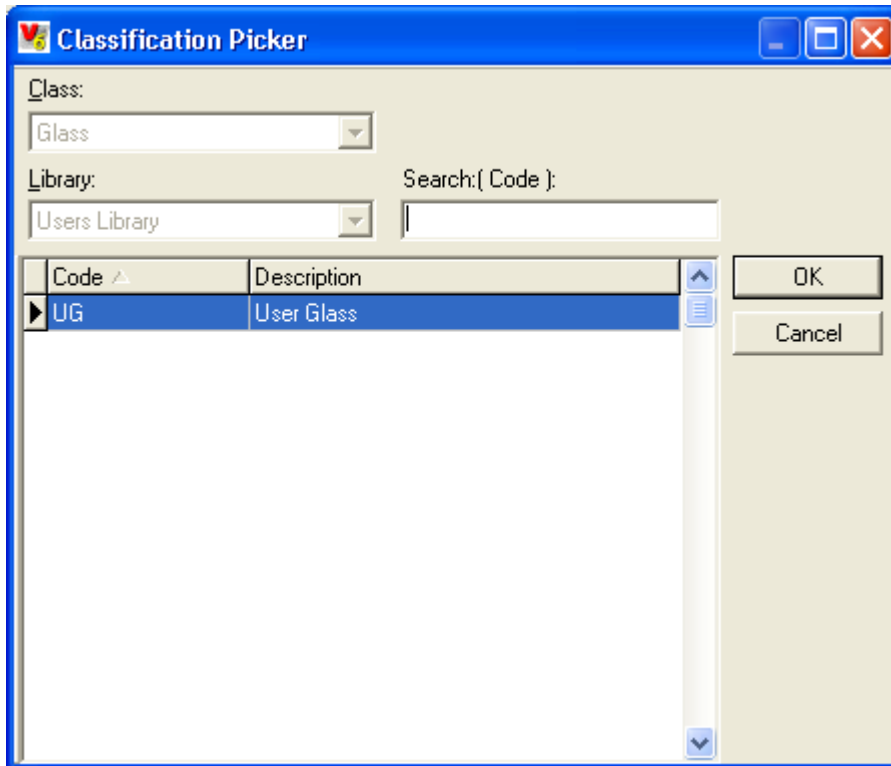
- Library: PRESS METAL
- Code: [Empty]
- Internal Ref: [Empty]
- Part Code Formula: [Empty] (with X and ... buttons)
- Description: [Empty]
- Classification: [Empty] (with X and ... buttons, highlighted by a black arrow)
- Internal EMark Prefix Formula: [Empty] (with ... button)
- Include in BOM: True (with ... button)
- Waste: Use default, Waste: 0.00%
- User Defined Fields: User defined field1: [Empty], User defined field2: [Empty]
- Substitution Formula: [Empty] (with X and ... buttons)
- Advanced Macro Pricing: Advanced Macro Pricing [Empty] (with X and ... buttons)
- Options: Hide From Pickers, Not visible unless selected in Design, Hide Code in Design and Report

Buttons at the bottom: OK, Cancel, Help

1. Glass

1.2 Add New Glass (Continued)

You must select the Group from the Classification list for the new Glass being created, then click **OK**



1. Glass

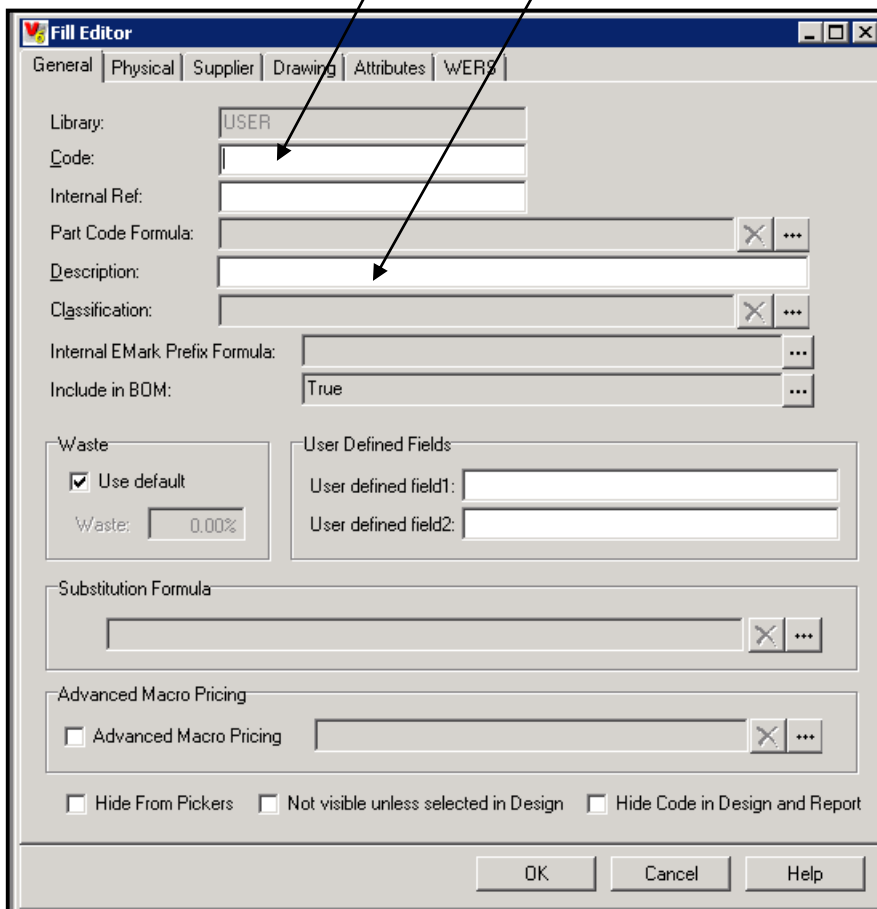
1.2 Add New Glass (Continued)

IMPORTANT - There are four (4) fields which **MUST be filled in** for ANY NEW GLASS type which you create. These fields are spread across three (3) of the Glass Tabs. They are -

Tab	Field
General	Code
General	Description
Physical	Maximum Size
Supplier	Supplier Details

Fill in these fields on each specific TAB as above above.

On the **General** tab fill in **Code & Description**

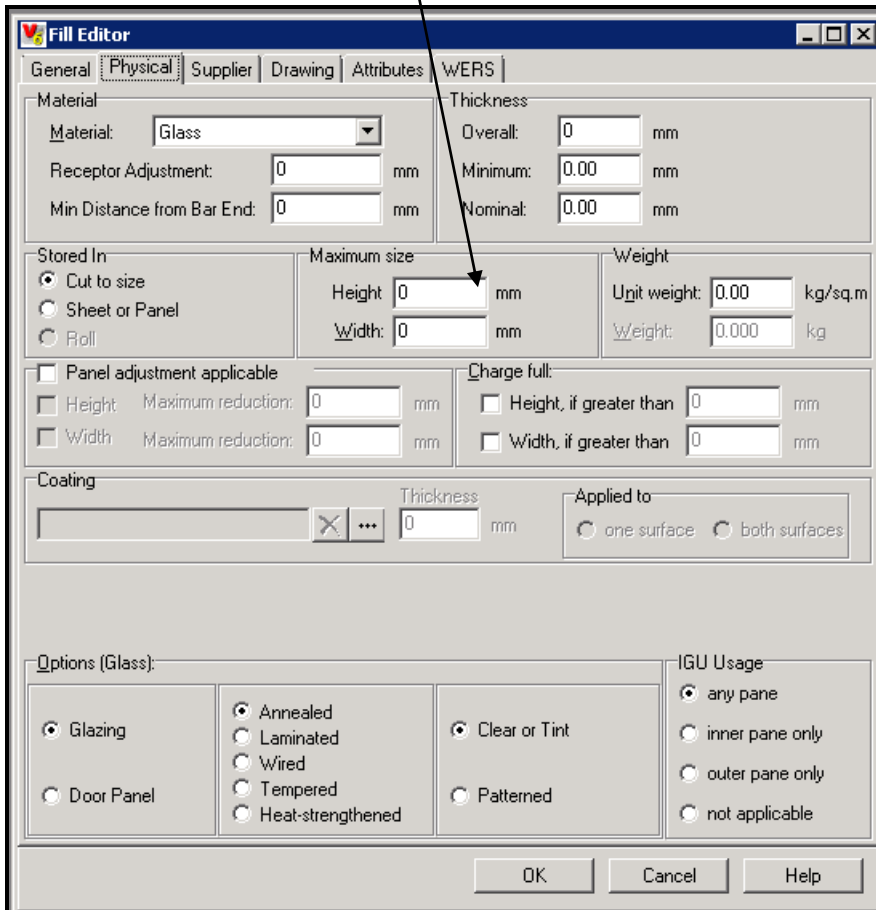


The screenshot shows the 'Fill Editor' dialog box with the 'General' tab selected. The 'Code' field is empty, and the 'Description' field is empty. Arrows point from the text 'Code & Description' to these two fields. Other fields include 'Library' (USER), 'Internal Ref.', 'Part Code Formula', 'Classification', 'Internal EMark Prefix Formula', 'Include in BOM' (True), 'Waste' (0.00%), 'User Defined Fields', 'Substitution Formula', and 'Advanced Macro Pricing'.

1. Glass

1.2 Add New Glass (Continued)

On the **Physical** tab fill in **Maximum Size (Glass Sheet Size)**



The screenshot shows the 'Fill Editor' dialog box with the 'Physical' tab selected. The 'Maximum size' section contains the following fields:

- Height: 0 mm
- Width: 0 mm

Other visible fields include:

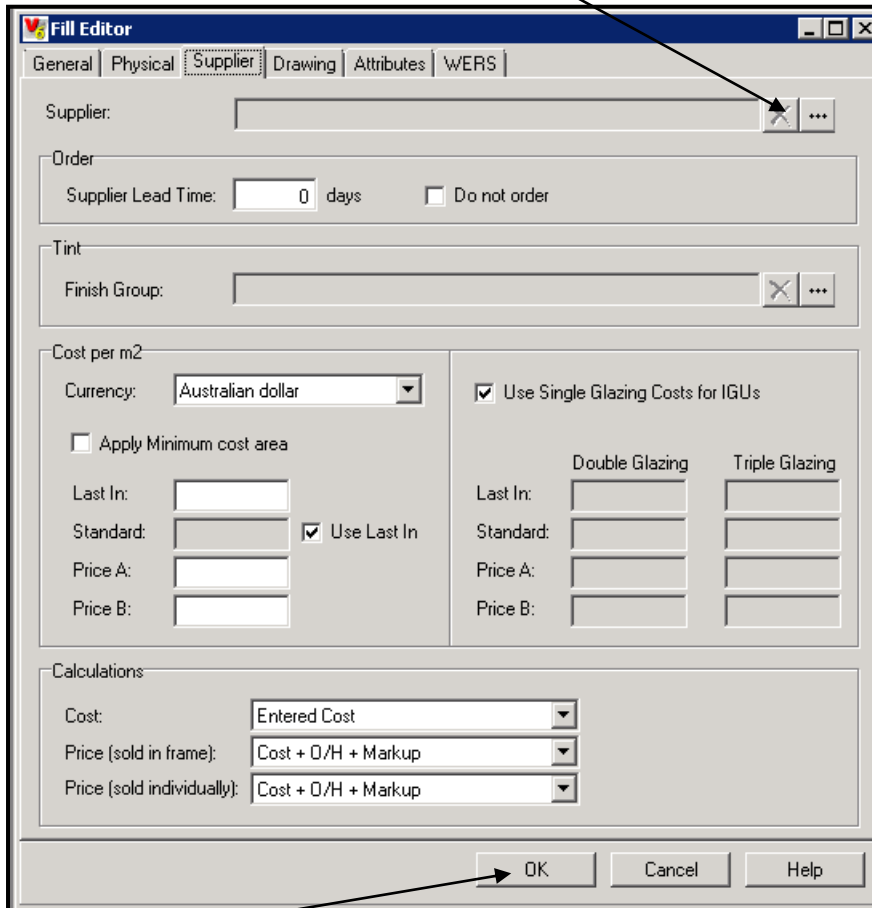
- Material: Glass
- Receptor Adjustment: 0 mm
- Min Distance from Bar End: 0 mm
- Thickness Overall: 0 mm
- Thickness Minimum: 0.00 mm
- Thickness Nominal: 0.00 mm
- Stored In: Cut to size, Sheet or Panel, Roll
- Weight: Unit weight: 0.00 kg/sq.m, Weight: 0.000 kg
- Panel adjustment applicable: Height, Width
- Charge full: Height, if greater than, Width, if greater than
- Coating: Thickness: 0 mm, Applied to: one surface, both surfaces
- Options (Glass): Glazing, Door Panel, Annealed, Laminated, Wired, Tempered, Heat-strengthened, Clear or Tint, Patterned
- IGU Usage: any pane, inner pane only, outer pane only, not applicable

Buttons at the bottom: OK, Cancel, Help

1. Glass

1.2 Add New Glass (Continued)

On the **Supplier** tab, click on the Supplier picker box, then select **Glass Supplier** and click OK



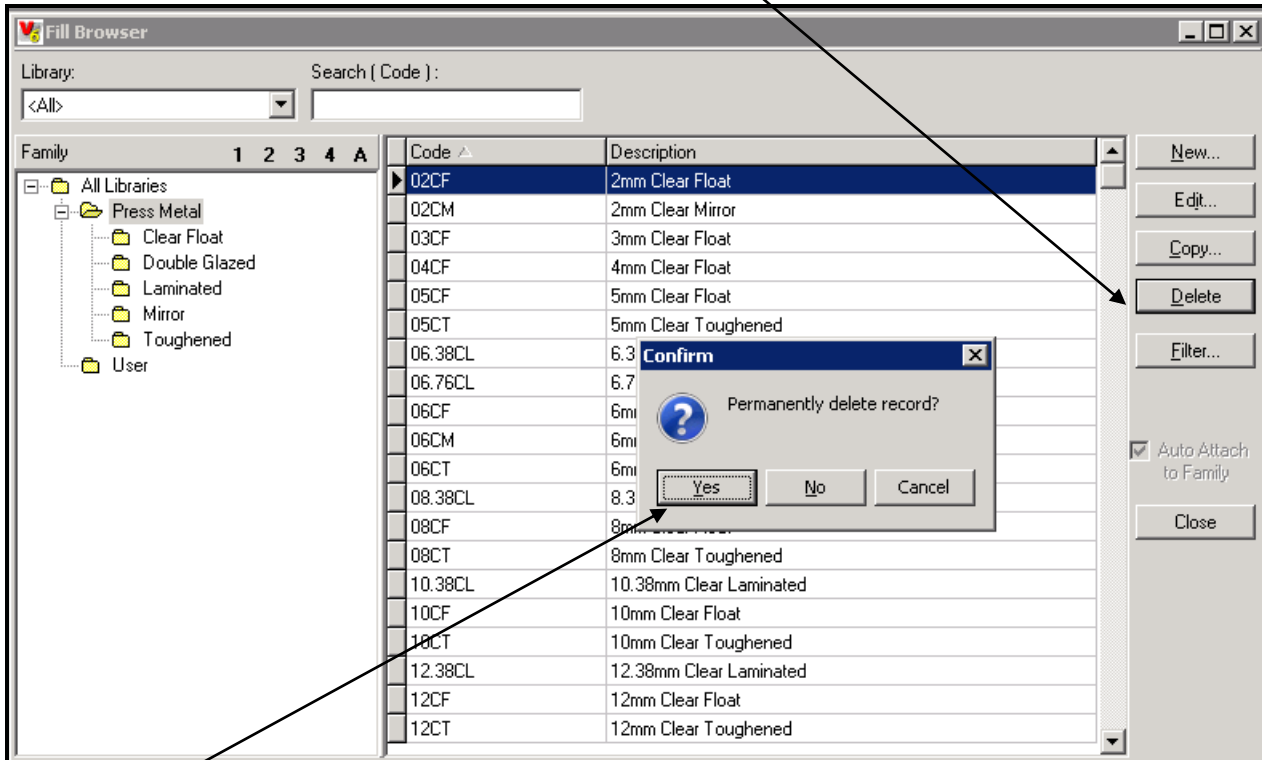
Click on **OK** and the Glass will be created in your Users Library.

1. Glass

1.3 Deleting Glass

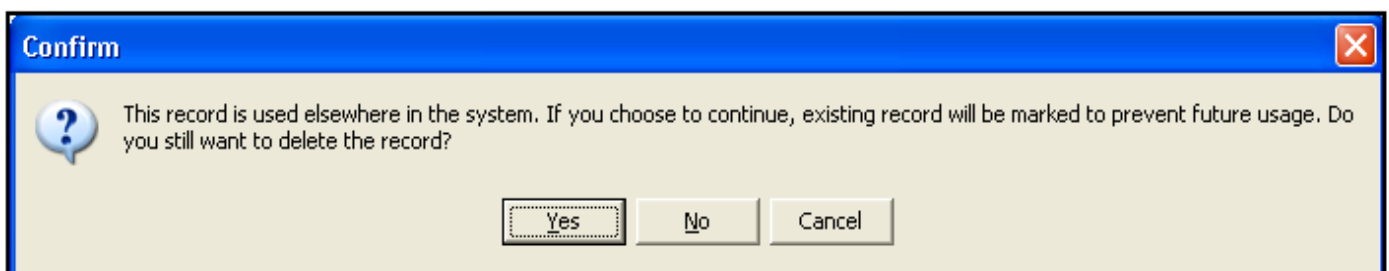
Select the Glass from the Fill Browser (**RESOURCE | FILL | STANDARD FILL**)

Select the Glass you wish to Delete and click on the **DELETE** key



Click **YES** to continue and permanently delete the glass

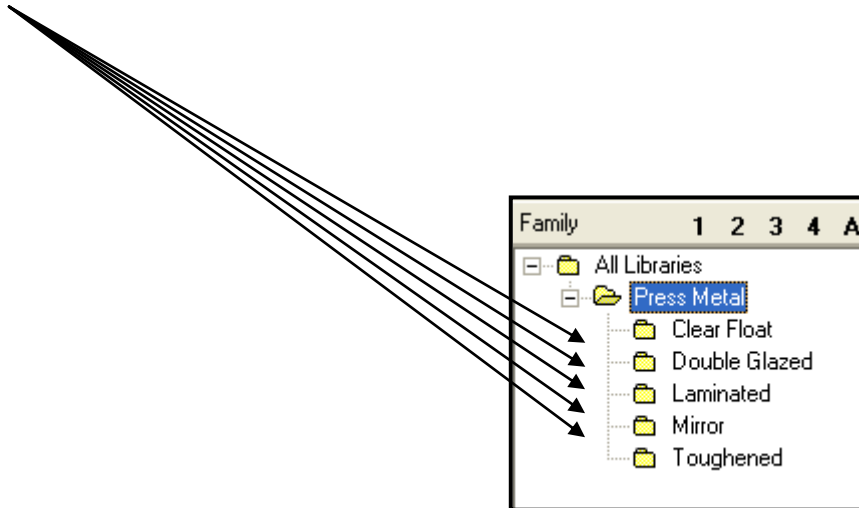
If the Glass selected to be Deleted is still being used within an existing Quote, the following message will appear-



If you select YES, the glass will no longer appear on any lists within V6 but it will not be actually deleted until the record(s) (i.e. Quotes) it is linked to is also deleted.

1.4 Add New Glass Families

Glass Families are shown in the **Glass Browser**



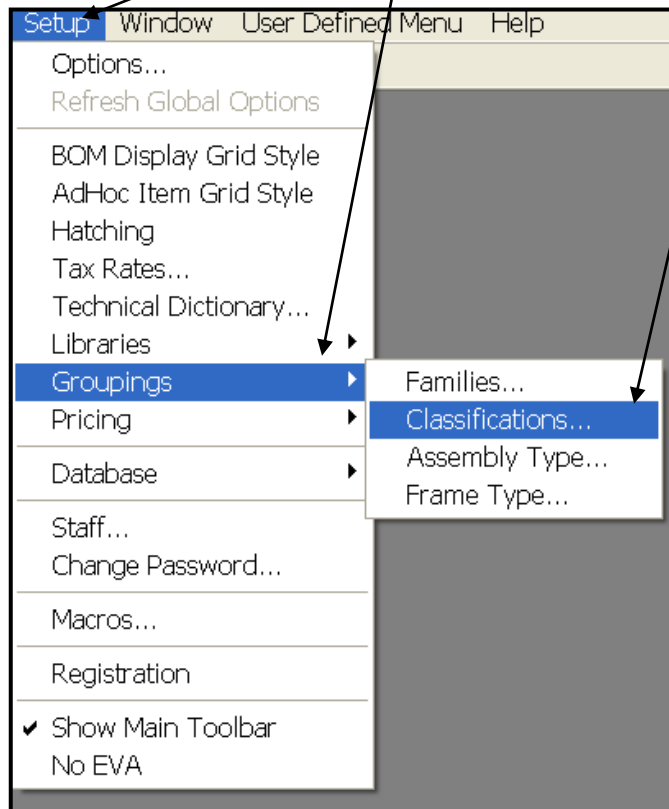
You may create more and add them to either the PRESS METAL library or to the User Library.
The USER Library is preferred as it remains unaffected by any updates provided by your supplier.

In order to create new Glass Families you must first create new Glass Classification(s)

1.4 Add New Glass Families 1.4a Add New Classification

Glass Classifications are typically - Clear, Laminated – their purpose is to link similar glass types together for display or reporting.

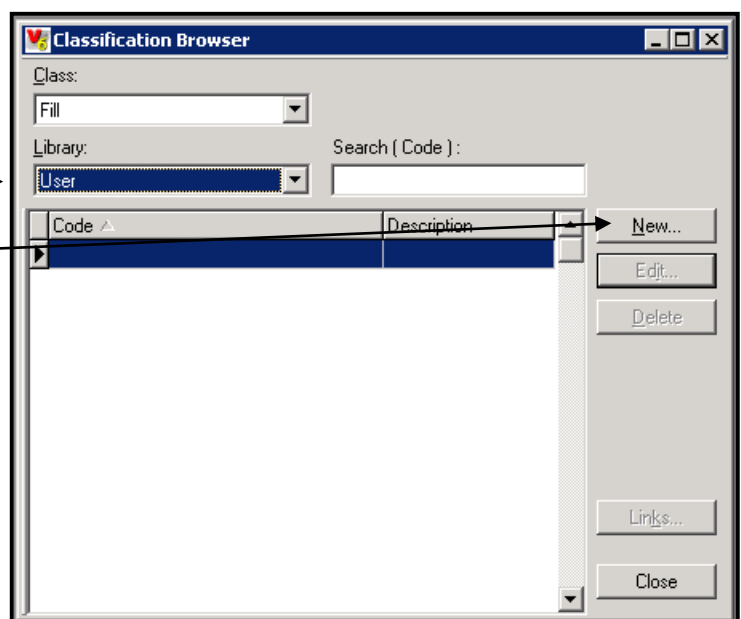
Go to **SETUP | GROUPINGS | CLASSIFICATIONS**



Scroll down the Class menu and click on **Fill**.

Then choose **USER** from the Library menu. →

Now Select **NEW** to add a new Classification.

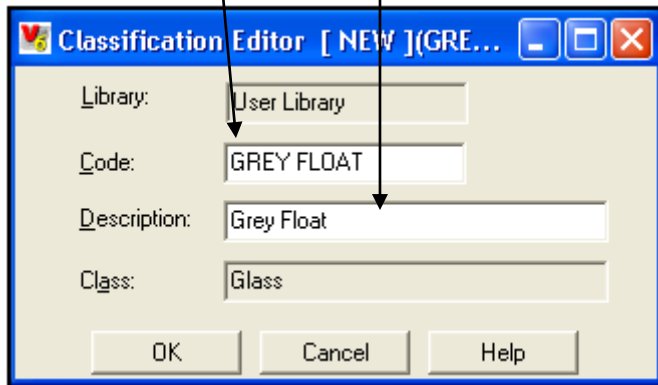


1. Glass

1.4 Add New Glass Families

1.4a Add New Classification (continued)

Enter a **Code** and **Description** for the new Glass Class – Click **OK** to Save



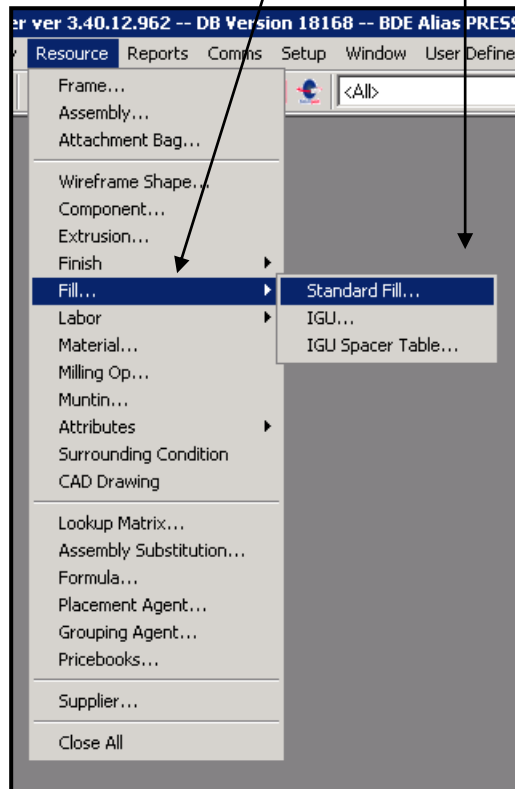
Classification Editor [NEW](GRE...
Library: User Library
Code: GREY FLOAT
Description: Grey Float
Class: Glass
OK Cancel Help

1. Glass

1.4 Add New Glass Families

1.4b Add New Families for Glass

Open the Glass Browser by selecting **RESOURCE | FILL | STANDARD FILL**

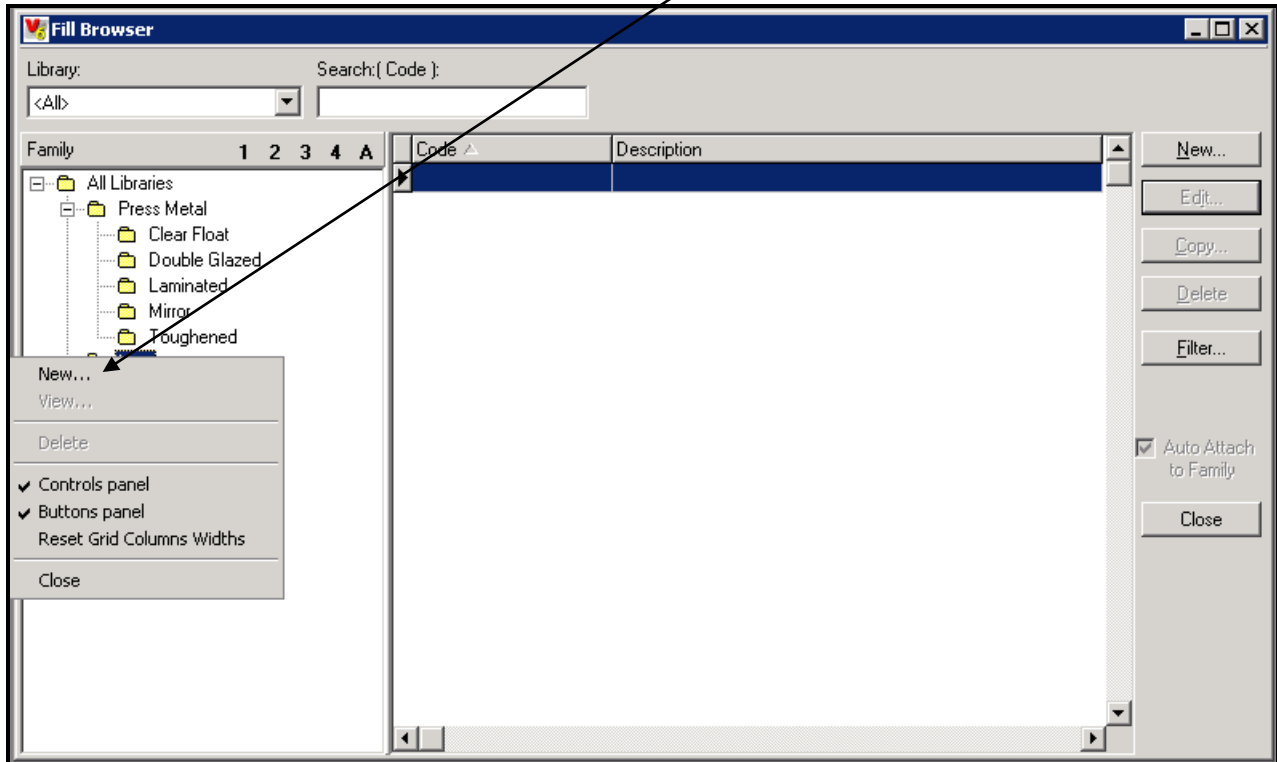


1. Glass

1.4 Add New Glass Families

1.4b Add New Families for Glass (continued)

Right-click on the User Library Family and select **NEW**

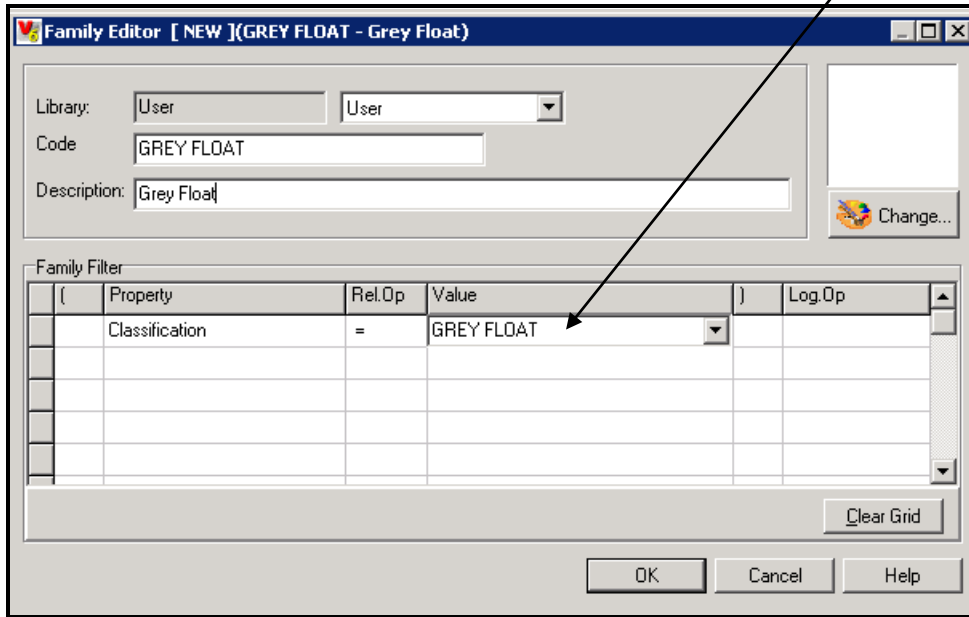


1. Glass

1.4 Add New Glass Families

1.4b Add New Families for Glass (continued)

You must input a **Code**, **Description** and then a **filter** so that V6 understands how to sort and attach the right Glass to this new Group – i.e.. **Classification = GREY FLOAT**
Here Classifications is set to GREY FLOAT which we created earlier.



Click **OK** to save changes

USER LIBRARY

2. User Library

2.1 General

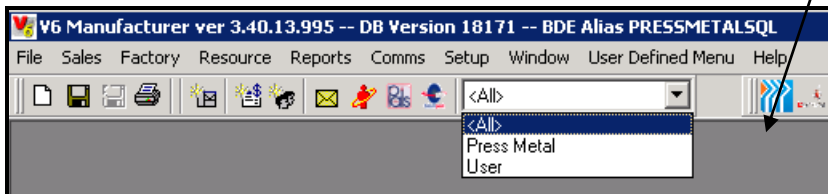
You have been supplied with an PRESS METAL V6 Database.

This Database is in the form of a V6 **Library**.

HOWEVER, all V6 systems also contain a **USER Library**.

Click on the Box denoted below and you will see the available Libraries.

..... *Press Metal*
..... *User*



All of the data provided by PRESS METAL is within the Press Metal Library.

Any data you wish to add should be added to the User Library – in this way you can ensure that your data is not altered by any updates provided by PRESS METAL.

The USER Library allows you to enter up to 25 codes into each group.

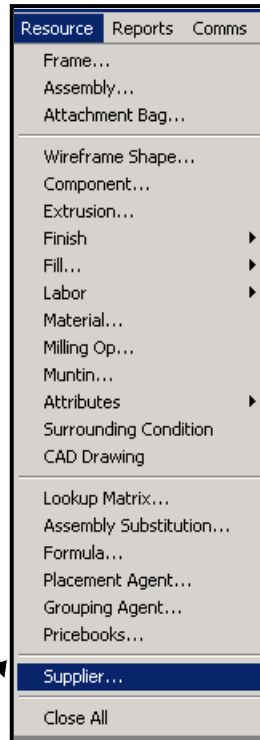
Groups are -
Extrusions
Components
Glass
Frames
Assemblies, etc.

2. User Library

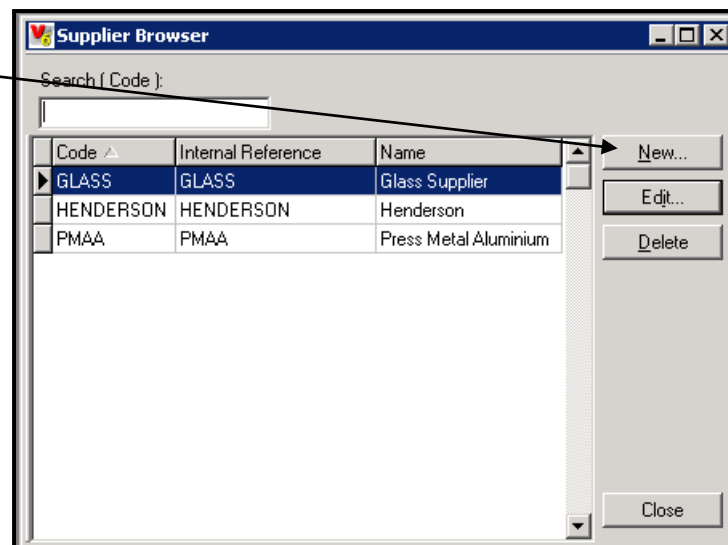
2.2 Create New Supplier

CLARIFICATION - Although Suppliers are general to ALL LIBRARIES, they are added to this section as it is envisaged that you will wish to generate your own list of suppliers for material purchased elsewhere.

Go to **Resource** | **Supplier**



Select **NEW**



2. User Library

2.2 Create New Supplier (continued)

Enter the basic **Supplier Code** details

The screenshot shows a 'Supplier Editor' dialog box with the following fields and values:

- Code: INTERLOCK
- Internal Ref: INTERLOCK
- Company: Interlock
- Contact Name: (empty)
- Contact Title: (empty)
- Email Address: (empty)
- Phone: (empty)
- Fax: (empty)
- Supplier Ref for us: (empty)
- Default Currency: Australian dollar
- User Defined Fields:
 - User defined field1: (empty)
 - User defined field2: (empty)

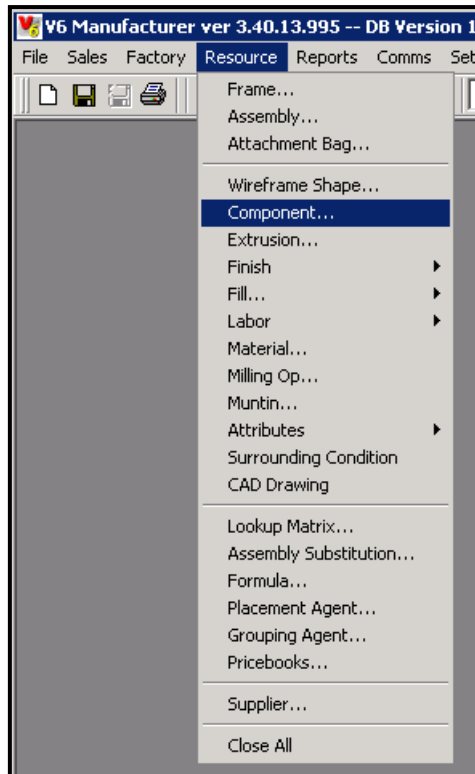
Buttons at the bottom: OK, Cancel, Help.

Select **OK**

2. User Library

2.3 Create New Components

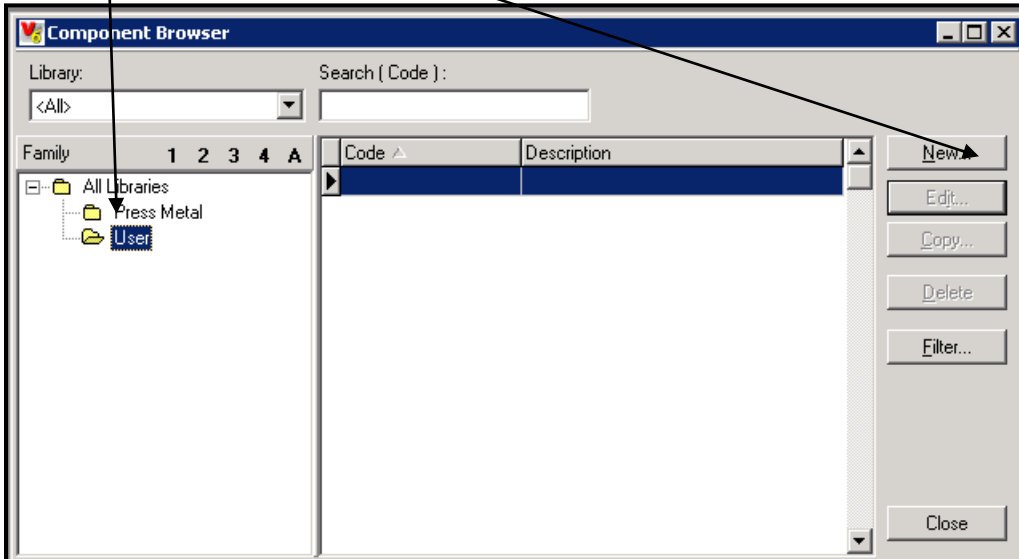
Go to **Resource** | **Component**



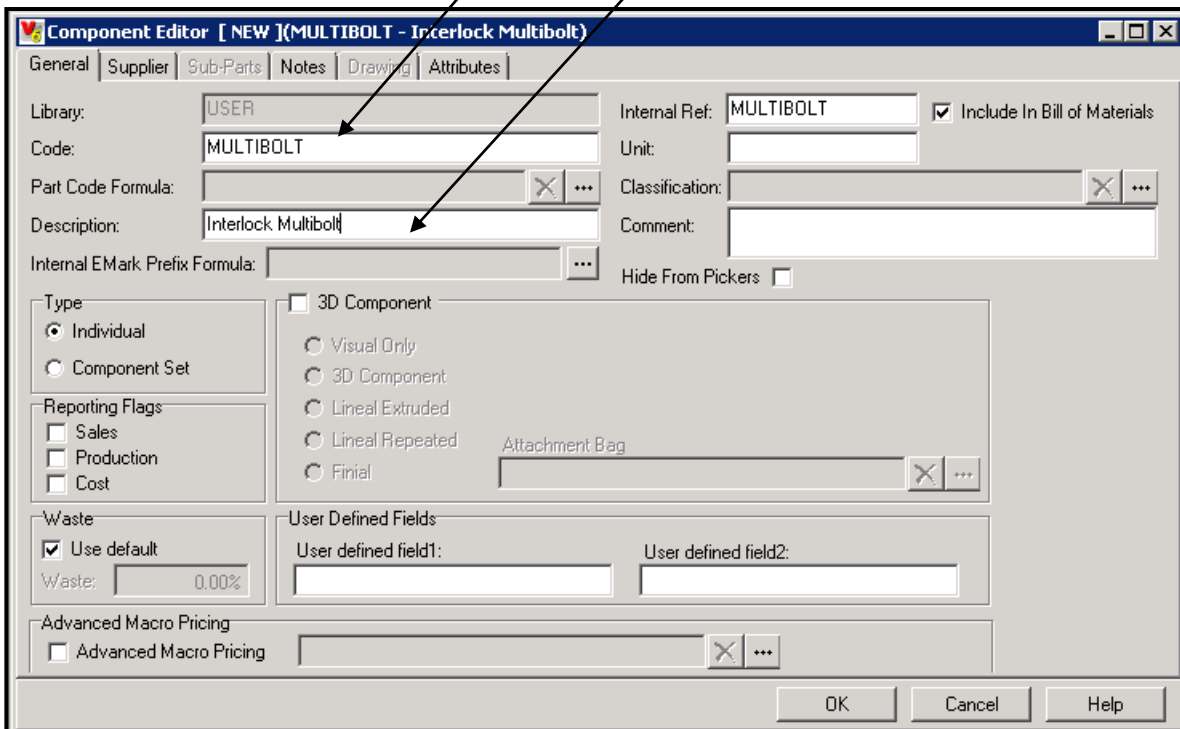
2. User Library

2.3 Create New Components (continued)

Select **USER**, then **NEW**



Enter the new Component (hardware) **Code** and **Description**



2. User Library

2.3 Create New Components (continued)

Select **Classification Browser** and assign this to the **User Component**

Component Editor [NEW](MULTIBOLT - Interlock Multibolt)

General | Supplier | Sub-Parts | Notes | Drawing | Attributes

Library: USER Internal Ref: MULTIBOLT Include In Bill of Materials

Code: MULTIBOLT Unit:

Part Code Formula: X ... Classification: X ...

Description: Interlock Multibolt Comment:

Internal EMark Prefix Formula: ... Hide From Pickers

Type

Individual Component Set

3D Component

Visual Only

3D Component

Lineal Extruded

Lineal Repeated

Finial Attachment Bag X ...

Reporting Flags

Sales

Production

Cost

Waste

Use default

Waste: 0.00%

User Defined Fields

User defined field1: User defined field2:

Advanced Macro Pricing

Advanced Macro Pricing X ...

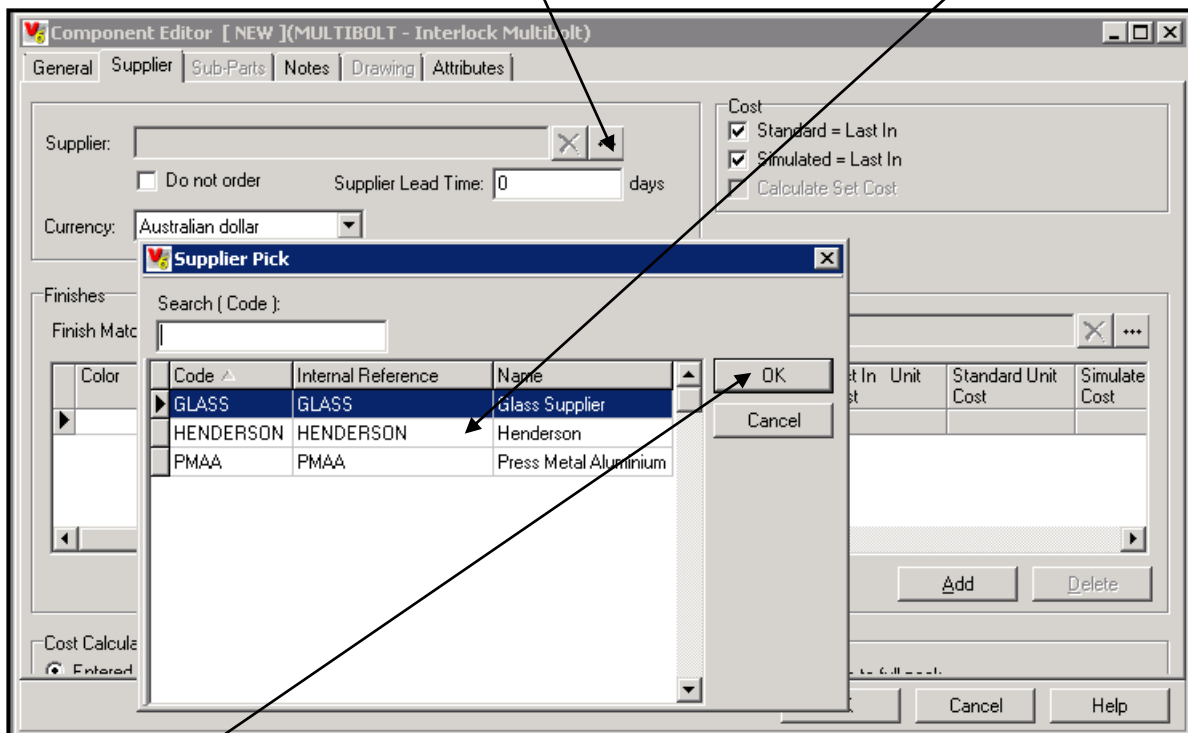
OK Cancel Help

Then click **OK** to continue

2. User Library

2.3 Create New Components (continued)

From the SUPPLIER tab, select the **Supplier Browser** and pick the correct **Supplier** for the Component you are creating.



Click **OK** to continue

2. User Library

2.3 Create New Components (continued)

From the SUPPLIER tab, select the **Color** that the Component is available in and enter the **Last In Pack Cost**.

Component Editor [NEW](MULTIBOLT - Interlock Multibolt)

General Supplier Sub-Parts Notes Drawing Attributes

Supplier: [: HENDERSON] Henderson X ...

Do not order Supplier Lead Time: 0 days

Currency: Australian dollar

Cost

Standard = Last In

Simulated = Last In

Calculate Set Cost

Finishes

Finish Match Table: X ...

Color	Default	Supplier Reference	Pack Size	Pack Weight (kg)	Last In Pack Cost	Last In Cost	Unit	Standard Unit Cost	Simulate Cost
▶ ANODI (G1)	...	<input checked="" type="checkbox"/> MULTIBOLT	1	0.000	\$ 0.00	...	\$ 0.00	\$ 0.00	\$ 0.00

Add Delete

Cost Calculation: Entered Cost

Price (Sold In Frame): Cost + O/H + Markup

Price (Sold Individually): Cost + O/H + Markup

Roundup: Alternative due to fill cost

OK Cancel Help

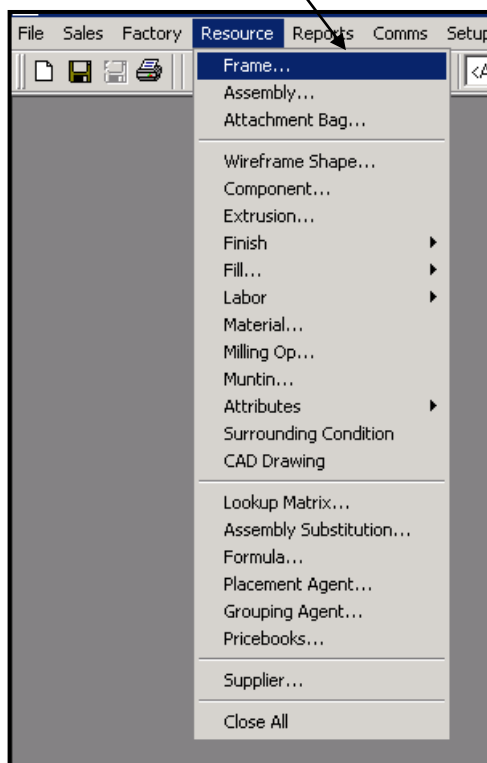
Select **OK**

2. User Library

2.4 Create New Frames

User Frames can be created by **COPYING** from an existing one into the User Library.

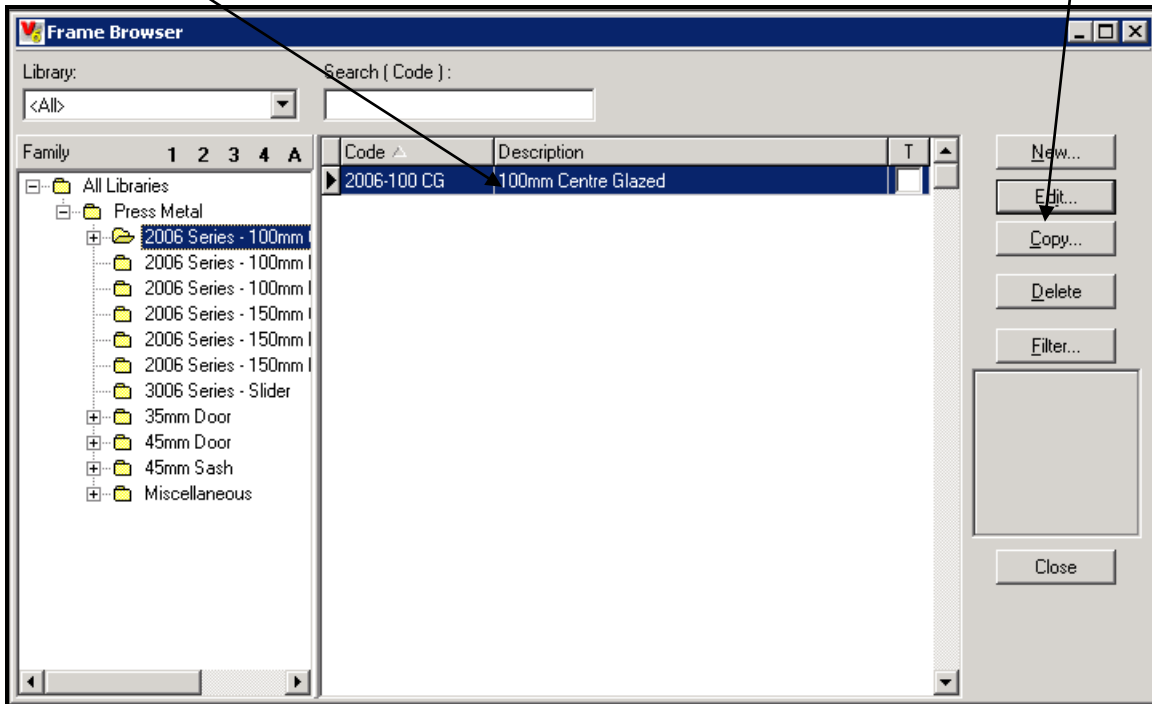
Select **Resource | Frame**



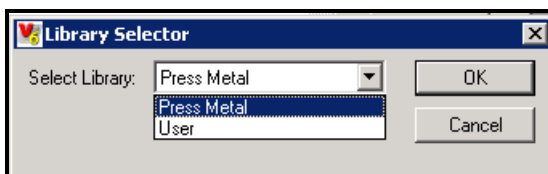
2. User Library

2.4 Create New Frames (Continued)

Find the **Frame** from the PRESS METAL library you wish to copy and select the **Copy** Button



You must nominate the **USER Library**, then click **OK**

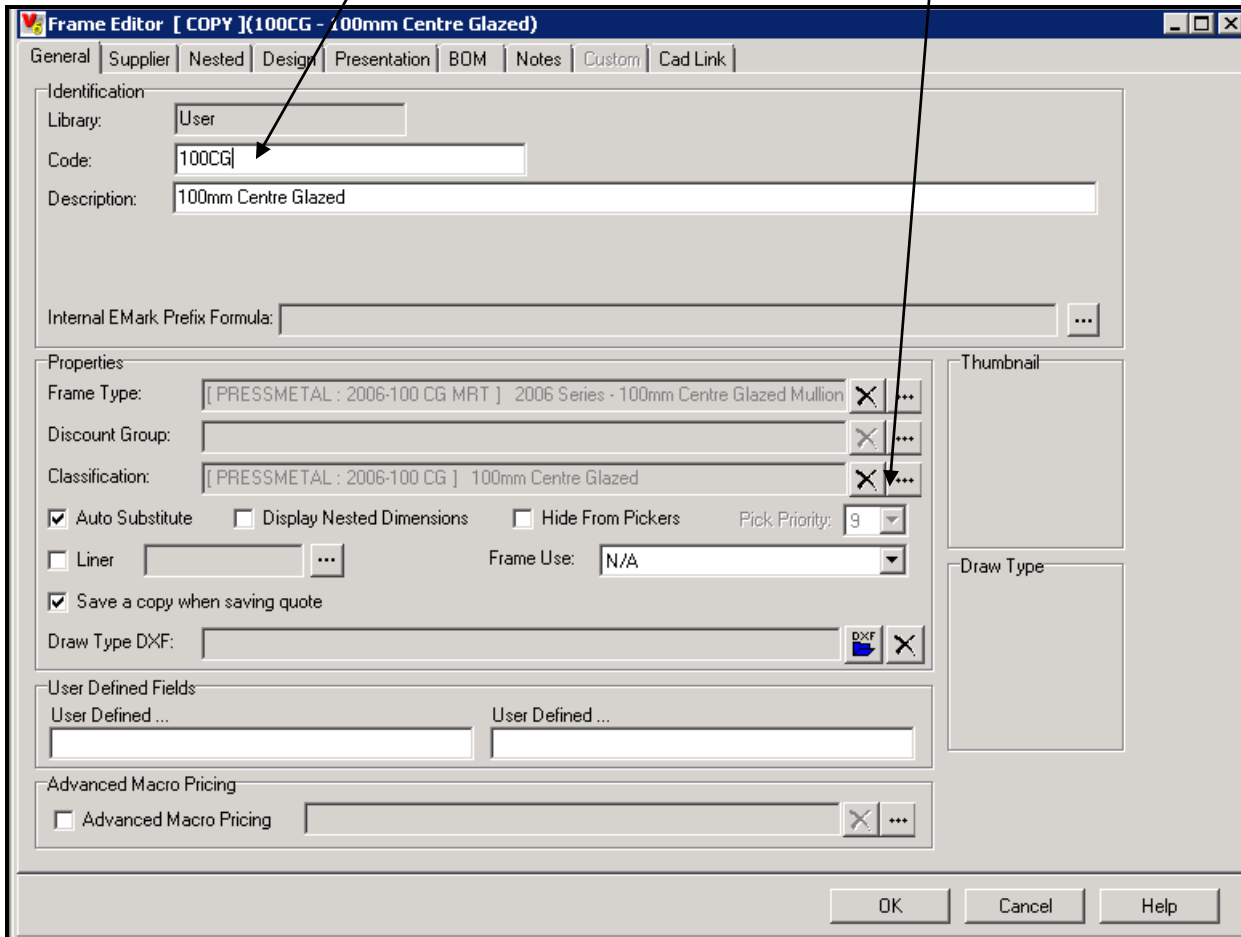


A duplicate copy of the Frame is now placed into the USER Library.

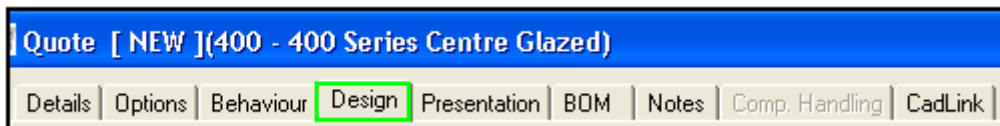
2. User Library

2.4 Create New Frames (Continued)

You must assign a different **Code** to this Frame, then select the **Classification Browser** and ensure **Users Frame** is highlighted. Then click **OK**



Using the **DESIGN** tab of this Frame, the user can make changes to the nature of the frame for later use within quotes.



LABOUR

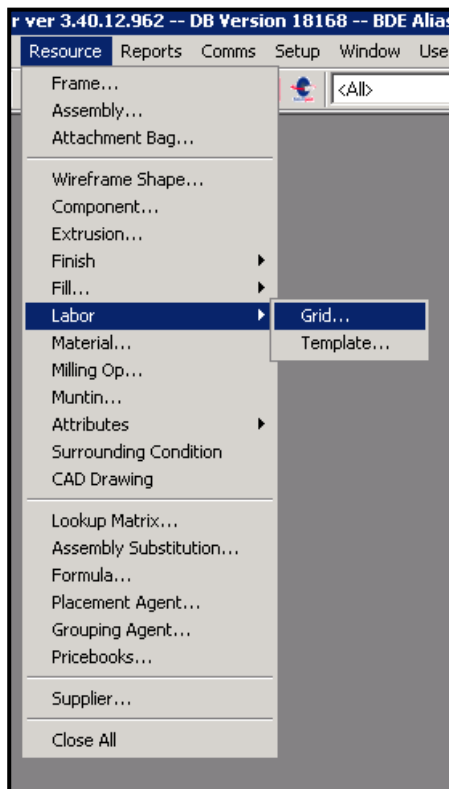
3. Labour

3.1 General

Labour values are included in this version of the PRESS METAL data base.

These values should be changed by the user to suit individual business costs.

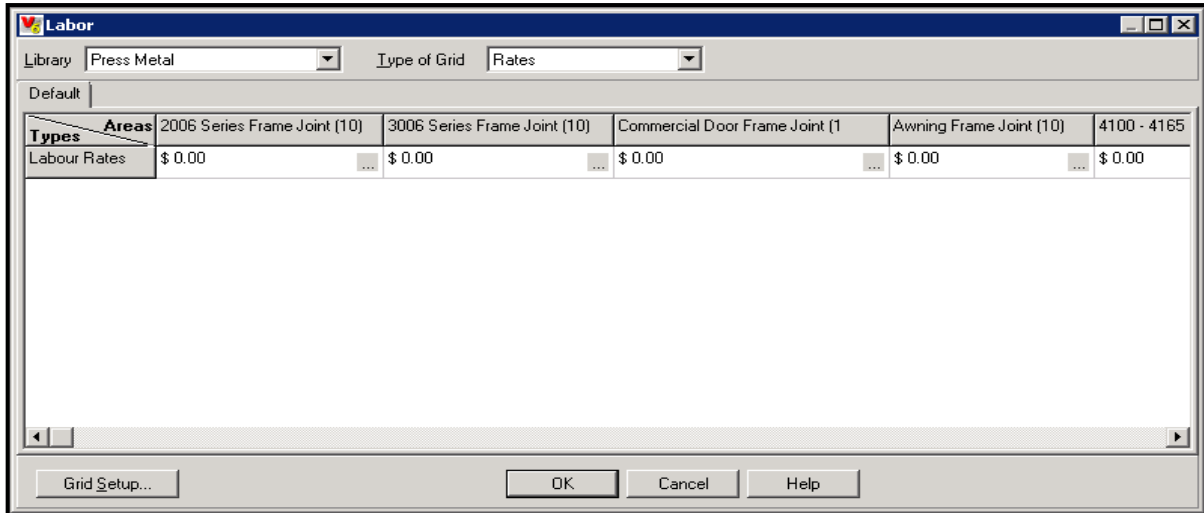
Go to **RESOURCE** | **LABOUR** | **GRID**



3. Labour

3.2 Updating Labour Values

Insert your labour costs per hour by clicking in the box and inserting the value.



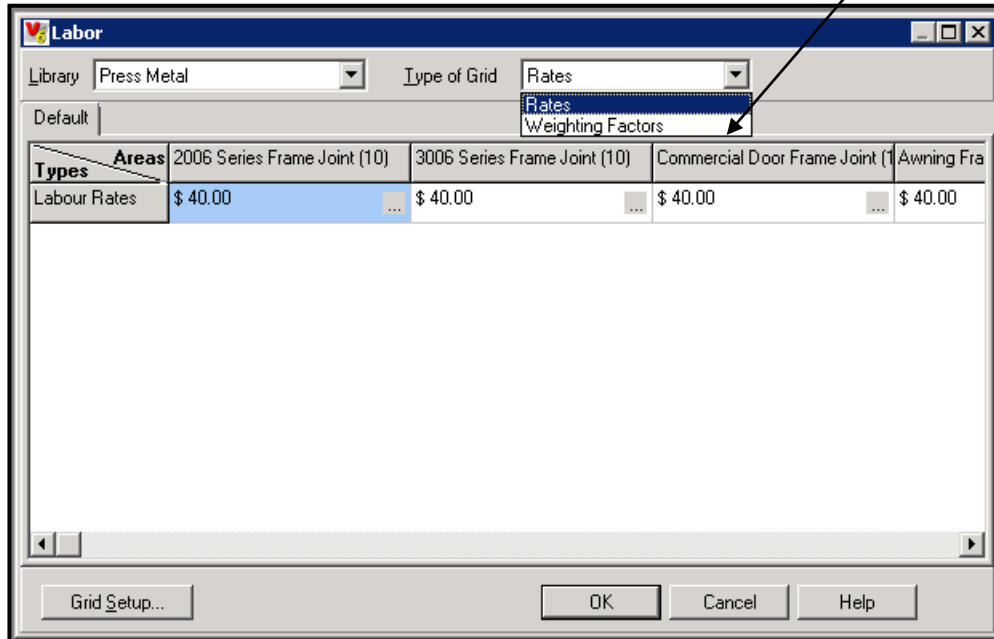
Insert your rate into each of the following boxes:

- 2006 Series Frame Joint
- 3006 Series Frame Joint
- Commercial Door Frame Joint
- Awning Frame Joint
- 4100-4165 Series Curtain Wall
- Glazing Channel Frame Joint
- 7000 Series Bifold Frame Joint
- Mitred Sash
- 3006 Series Sash
- Commercial Door Sash
- 7000 Series Bifold Sash
- Couplers
- Factory Glaze Each
- Factory Glaze SqMtr
- Factory Glaze L/Mtr
- Site Fixing SqMtr
- Site Glaze Each
- Site Glaze LMtr
- Site Glaze >7mm <12.5mm SqMt
- Site Glaze >12.5mm <25mm SqMt
- Site Glaze >25mm SqMt
- Fit Lock
- Fit COC Closer
- Fit Surface Mount Closer
- Fit Flushbolts Each
- Fit Adaptors each
- Fit Reveals each

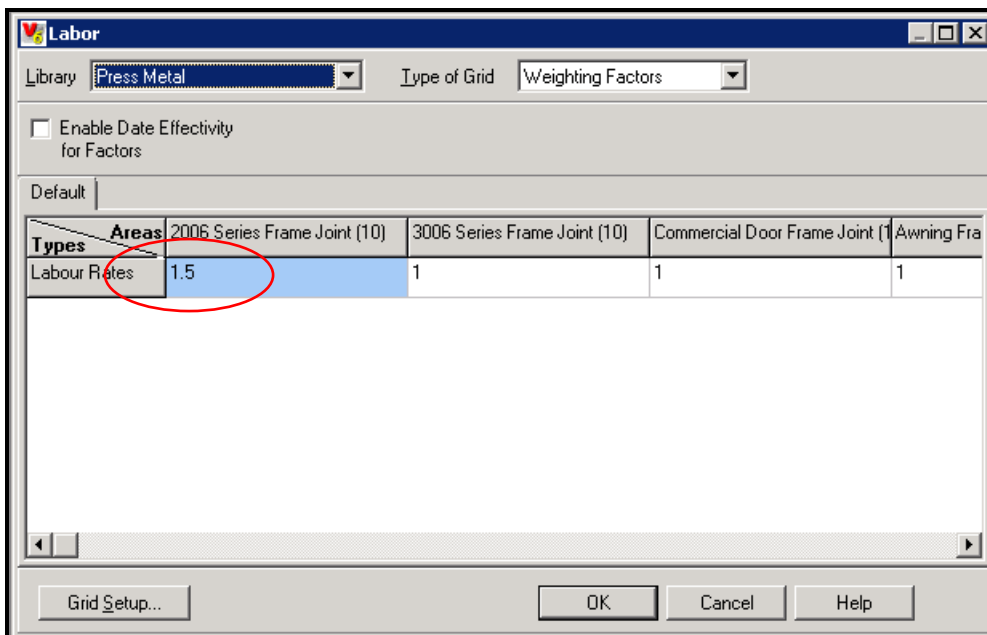
3. Labour

3.2 Updating Labour Values (Continued)

To change the Weighting Factors, click on the drop down box and then choose **Weighting Factors**.



E.g. 2006 Series Frame Joint – changed to 1.5 (This means an increase of 50% above the rate allocated for this labour type.)



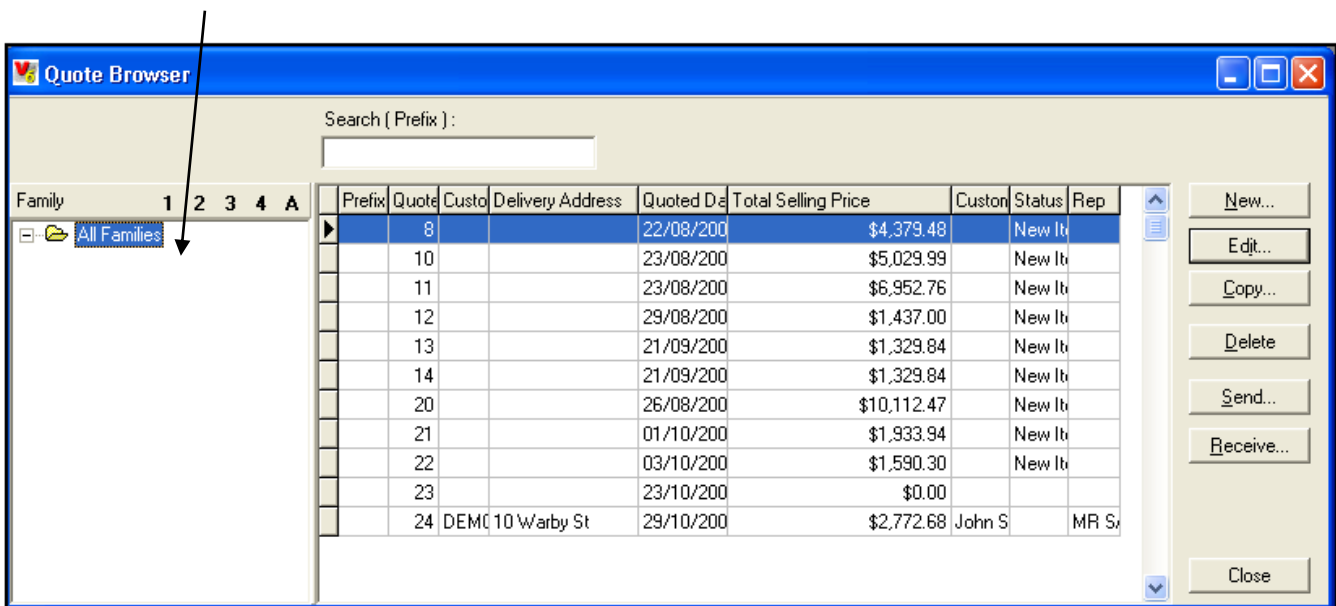
QUOTE FAMILIES

4. Quote Families

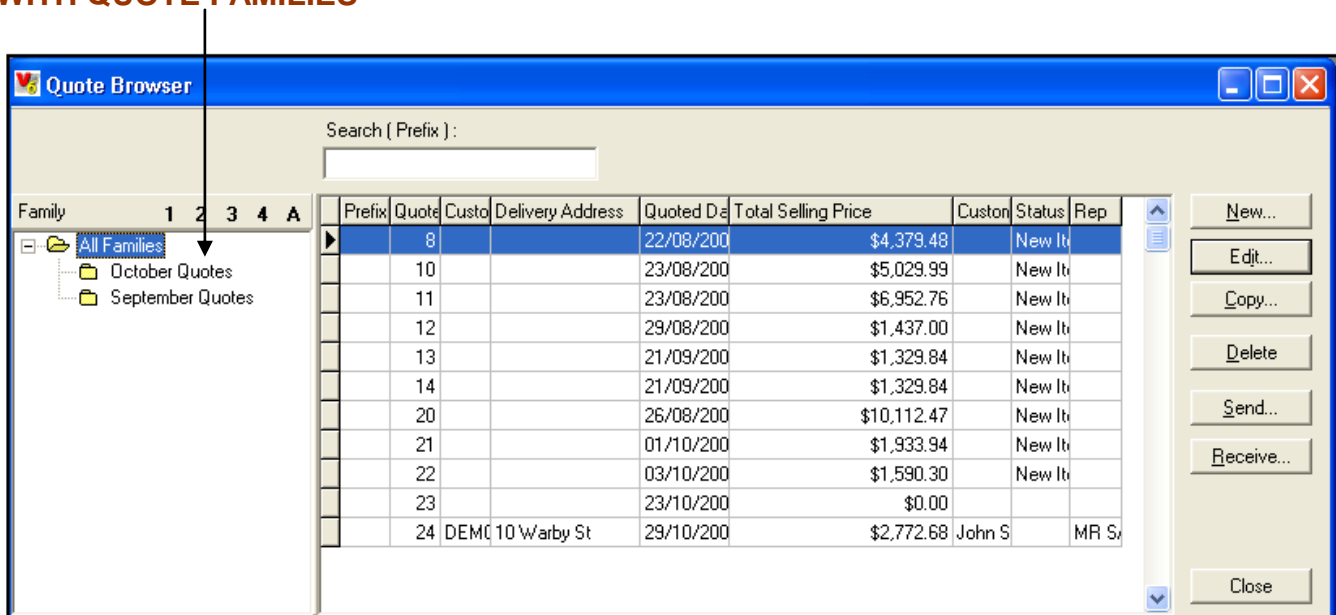
4.1 General

The **Quote Browser** can be separated into various families (groups) for easier sorting and dissection.

WITHOUT QUOTE FAMILIES –



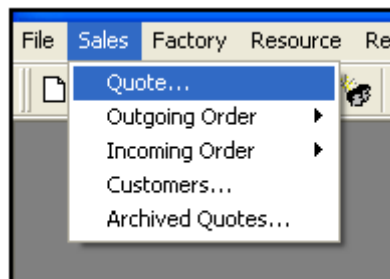
WITH QUOTE FAMILIES –



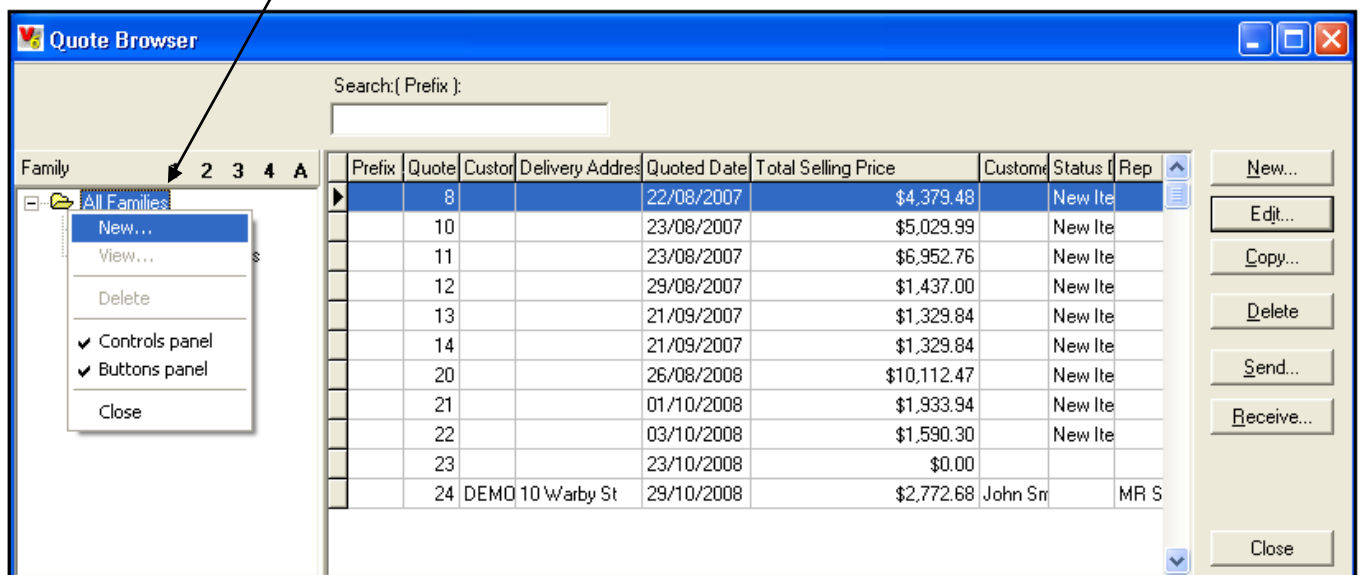
4. Quote Families

4.2 Create Quote Families

Open the Quote Browser by selecting **SALES** | **QUOTE**



Right-click on **ALL FAMILIES** and select **NEW**

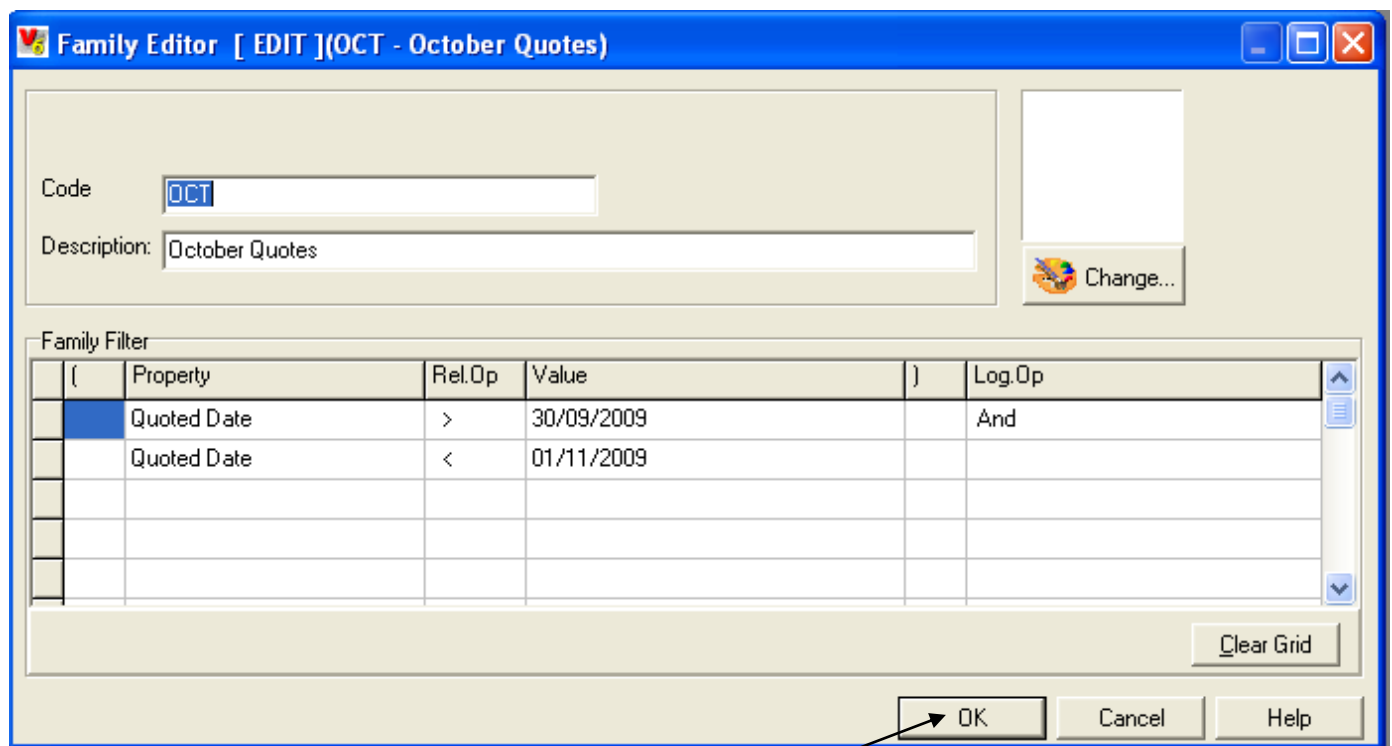


4. Quote Families

4.2 Create Quote Families (Continued)

You must then complete the **Name/Description** and the basis by which it sorts quotes into this Family.

There are various options available under **Property**, **Rel. Operation**, and **Value**.



Code:

Description:

Change...

(Property	Rel.Op	Value)	Log.Op
	Quoted Date	>	30/09/2009		And
	Quoted Date	<	01/11/2009		

Clear Grid

OK Cancel Help

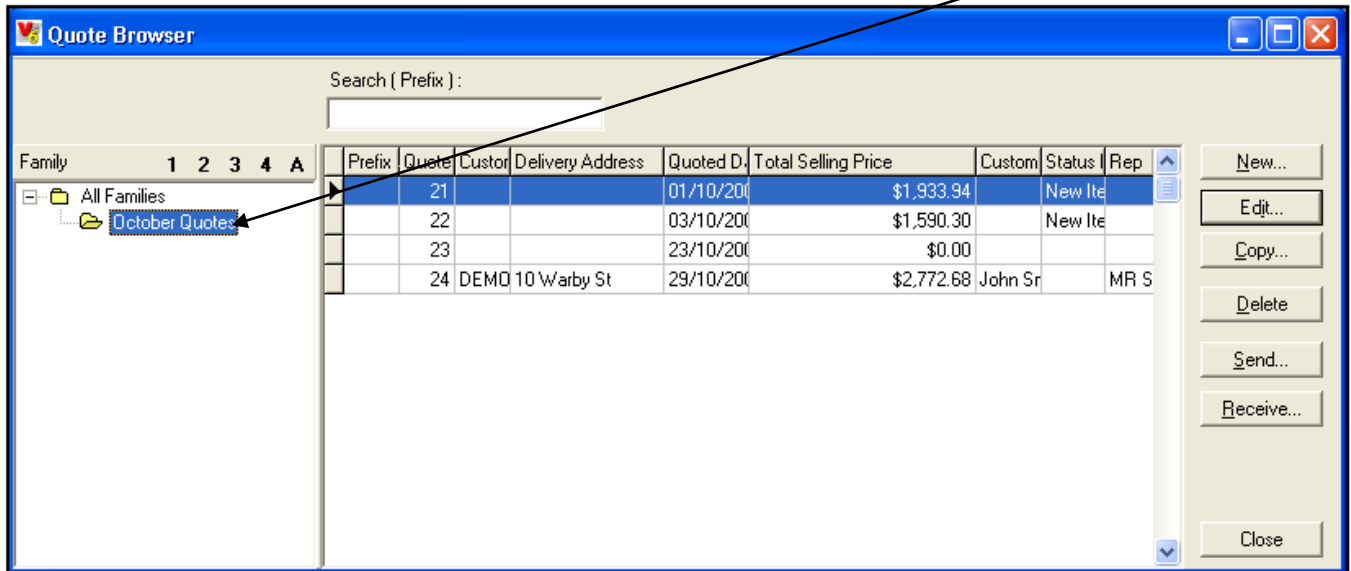
Click **OK** to continue

In the above example, we are creating a family for all October 2009 Quotes

4. Quote Families

4.2 Create Quote Families (Continued)

The result of this new Quote Family on the Quote Browser shows a Sub-Family called **October Quotes** under which **ONLY** October quotes will be displayed.



Note, when **All Families** is selected from the Quote Browser, **ALL QUOTES** will be displayed regardless of whether they are also sorted into various Sub-Families

