

Ordering From Winsys Lite

Winsys Lite Setup

To export orders from Winsys Lite to email them to North Star there are some simple settings to be customized to your preferences.

1. At the top of the screen click on "Other" then "System Profile". Select the last tab titled "Graphics/Data Export Options". In the Data Export Path enter the folder you would like the file exported to. We recommend a subfolder of your current ws32lite folder so it is easily recognizable but if something works better for you feel free to use it. Rather than typing the folder name manually, you can click on the box to the right and browse to the folder you would like to use.
2. Under Export File Naming Method "1-Number" will use the dealer account number with leading 0s as the file name. "2-Constant Text" will always use the text placed in the "File Name" box just below it. We recommend option "3-Named When Exported". This will allow the user to give the export file a unique name rather than overwriting any previous exports. The file name must have a maximum of 8 characters and only letters and numbers are allowed.
3. The bottom checkbox will allow the user to create the export file directly from the list of orders. If you would like to create a file for each individual order, this is the simplest way to do it, so you can check this box. If you want to export orders in batches, which is easier if you are ordering a number of orders at the same time or placing your orders daily, you can leave this unchecked.
4. Once you have these settings the way you want them, click "OK". You will have to close Winsys Lite and restart it for the changes to take effect.

Exporting an Individual Order

1. To place an individual order from Winsys Lite click on the first icon at the top of your screen titled "Enter/Edit Customer Orders" .
2. Hi-lite the order you want to place and click on the button titled "Export Order". If the button is greyed out and unusable, go back to step three in the setup section above.
3. Enter a file name when prompted, we recommend something that will help you identify the file when you proceed to sending it.
4. Once the export is complete you will receive a notice that the file has been created and the order Class will change to "S" for submitted and the color will change to red.
5. Proceed to the E-Mailing Orders section below.

Exporting Multiple Orders

1. To place a group of orders from Winsys Lite click on the first icon at the top of your screen titled "Enter/Edit Customer Orders".
2. Select an order you would like to place and click the "Change Order" button.
3. On the left side of the screen change the order status from "Estimate" to "Ready to Submit" then click "OK". When you return to the list of orders the Class will be "R" and the order will be displayed in green. Be sure to only set orders you would like to place to this status. If you mark others they will be included in step 5.
4. Repeat steps 2 and 3 for each order you would like to place.
5. Click on the second icon at the top of the screen titled "Backlog (Scheduling)" and after clicking on the "Ready to Submit" radio button click "OK". This will create a list of ALL the orders in the system with an order class of Ready to Submit".
6. Click the "Mark All" button at the bottom left of the window. You will notice the "Yes" in the first column on the left next to each order. If there is an order in the list that you do not wish to place, you can unmark it by double-clicking on it.
7. Press the "Export/Archive" button at the bottom of the screen and click on "Export Marked Orders" and then select "To the Factory".
8. Enter a file name when prompted, we recommend something that will help you identify the file when you proceed to sending it.
9. Once the export is complete you will receive a notice that the file has been created. If you go back to the list of orders you will see that the order Class will have changed to "S" for submitted and the color will now be red.
10. Proceed to the E-Mailing Orders section below.

E-Mailing Orders

Different programs operate in various ways; the steps here are guidelines and may vary from the way your e-mail program works.

1. Open your e-mail program
2. Address the message to orders@northstarwindows.com
3. Place something that makes the message easy to identify in the Subject of the message.

4. Click on Attach a File and browse to the file that was exported earlier and click OK.
5. Click on Send.
6. If there was something in the subject field of your message you will receive an automated reply shortly after you send it notifying you that we received your e-mail.

Ordering From Winsys Lite Eye

1. Hi-Lite the order you would like to place
2. Click on "Submit Order to Factory".
3. Click OK to confirm. Then the order will move from the current tab to the tab titled "Submitted Quotes (Pending Confirmation)".