



# Fleetwood Windows & Doors

## Snapshot Estimator

### INDEX

#### INTRODUCTION

#### USER GUIDE

	Pg.
<b>I. Log In</b>	4
<b>II. Data Entry</b>	
A. Global Defaults	5
B. Creating Quotes	
Job Information Tab	6
Miscellaneous Tab	7
Line Details Tab	
Add Items	
Notes Tab	9
Transfer Tab	
Printing	10
Miscellaneous Order Entry	11
Horizontal Stack Bar	
Special Structural Opts	
Light Width	12
TDL Bars	
Glass code (Lite-by-Lite Glazing)	13
Light Height	14
C. Customer Table	15
D. Open Quotes	16
E. Browse Quotes	
<b>III. AutoCAD Drawings</b>	17
A. Multi-Slide Drawings	
B. Architectural Drawings	18
<b>IV. Estimator Updates</b>	19
Download from the Internet	

## **ADDENDUM(S)**

- MS Jet Update Procedure 20
- Re-Linking or NETWORKING 21
- ODBC 23

## **INSTALLATION & SETUP**

- I. Minimum Requirements** 24
- II. System Setup** 24
- III. System Administrator** 28
  - A. .INI File
    - Dealer Logo
  - B. Local or Network?
  - C. Security/ Adding Users 29
  - D. Price to Report (printed quote) / Multipliers 30
    - Retail price options

## **TROUBLESHOOTING**

- Bar code 35
- Security Warning – Microsoft Access 2003
- Recover Quote 36
- EDI Email 37

## **ADDENDUM(S): Data Entry Training Guides**

- Global Frame Option Update 38
- Multi-Slide Door Plan View Image 39
- Glass Widths, Panel Widths and Centerlines 40

# Fleetwood Windows & Doors

## Snapshot Estimator

### Introduction

**Snapshot is Fleetwood's estimating software designed exclusively to allow our dealers a means of accurately creating their own quotes and then electronically transferring quotes and orders directly to the factory.**

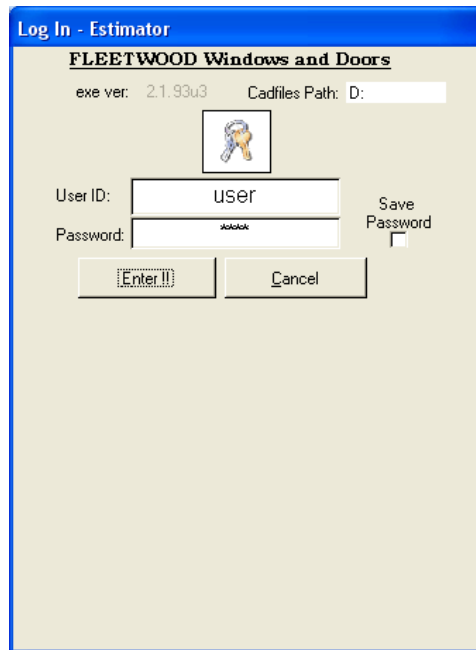
### Features

- Provides field-based quoting. Dealers will establish their own customer databases within Snapshot.
- Quick, accurate, professional looking quotes for your customers with your dealer logo and information.
- Includes product architectural and multi-slide drawings.
- Available 24/7. Dealers can generate quotes and orders and transfer to the factory around the clock.
- Reduces the number of reconfigured orders due to incomplete or invalid information.
- Updates to Snapshot will be made directly from your Snapshot main menu via the Internet.
- Lead-times and formulas will be automatically downloaded at predetermined intervals.
- Minimal system requirements. Software will run on most basic systems using Microsoft Access 2003 runtime (included).

## I. Log In

### Open Snapshot from your desktop or C:\Fleetwood folder

Enter your User ID and Password, [**Enter**]. This should be 'User' and 'User.'



Log In - Estimator

**FLEETWOOD Windows and Doors**

exe ver: 2.1.93u3 Cadfiles Path: D:

User ID: USER

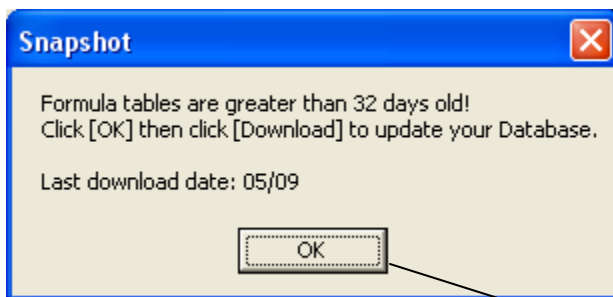
Password: \*\*\*\*\*

Save Password

Enter !! Cancel

### Auto Check for Updates

During **LOG IN**, Snapshot will prompt the user to download the latest Snapshot update if their version of Snapshot is more than 32 days old.

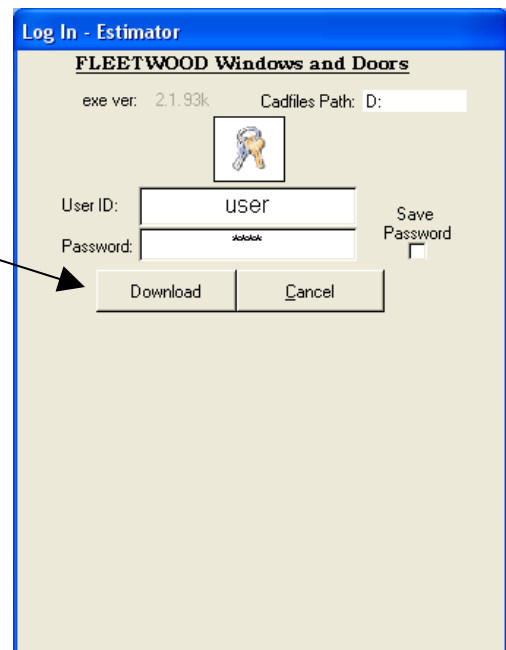


Snapshot

Formula tables are greater than 32 days old!  
Click [OK] then click [Download] to update your Database.

Last download date: 05/09

OK



Log In - Estimator

**FLEETWOOD Windows and Doors**

exe ver: 2.1.93k Cadfiles Path: D:

User ID: USER

Password: \*\*\*\*\*

Save Password

Download Cancel

## II. Data Entry

**Note:** Avoid using special characters such as apostrophes ( ' ') and commas ( , ) in Snapshot – this may cause errors.



### A. Global Defaults for all new quotes

Click **[Defaults]**

1. Select your defaults for Finish, Glass, Boxing, and Tax Rate.
2. Set your default Lead-time to your customer.

### B. Creating a Quote

1. On the Main Menu, click **[New Quote]** to start a quote.

### {Tabs}

Once in a quote, there are several tabs across the top that allow you to switch between different functionalities of the quote. Each tab is further explained in the User Guide, but do familiarize yourself with them as they are referenced often.

Callout boxes:

- a. Job Information
- b. Miscellaneous
- c. Notes
- d. Line Details
- e. Transfer

## Job Information {Tab}

- i. Select an existing customer from the blue drop down menu *or* to create a new customer, click on the [Address Book] to enter a new customer into the Customer Table and then [Update Quote].  
(see II. Data Entry – C. Customer Table – Add a New Customer)

Job Information Miscellaneous Notes Line Details Transfer

Customer: [0]

Add New Customer Email: Phone: Address: City, St, Zip:

Fax:

- ii. Enter Job Name\*, Contact, and PO.  
\*Please note: the Job Name is required before items can be added to a quote.
- iii. Enter Jobsite address\*.  
\*Please note: the Jobsite city and state are required before items can be added to a quote.
- iv. Check box for appropriate Delivery type.
- v. Add any additional Setup or Shipping charges you require to your customer.

\*Job Name: [ ] PO: [ ]

Contact: [ ]

Jobsite contact / Phone #: [ ]

Address 1: [ ] Addr 2: [ ]

\*City, State, Zip: [ ]

\* - Required Fields

\*Delivery Type:  Ship to Dealer  Ship to Jobsite

Special Instructions: [ ]

Show Dealer Costs **Update Pricing**

Does NOT Include: Setup, Shipping, or Tax

Dealer Price: \$0.00 Mult: 1.000

Retail: \$0.00 retail: 1.130

Tax Rate: 7.7500 %

Setup: \$0.00 weight:

Shipping: \$0.00 cube

- vi. Set product defaults for this quote
  - Extrusion/Component finish
  - Glass
  - Frame Type
  - Edge Armor
  - Thermal Break
  - Boxing
  - Glass spacer
  - Breather tubes
- vii. If there items already entered on this quote, select the appropriate **Update** checkboxes and click [Update ALL line items]

## Miscellaneous {Tab}

- From the [Miscellaneous] tab you can delete and copy quotes using the 2 buttons, respectively labeled, at the top of the screen.



**Note:** Some of these features may require modified user security levels (see **Installation & Setup – III. System Administrator – C. Security/ Adding Users**).

Job Information | Miscellaneous | Notes | Line Details | Transfer

Copy Quote | Delete Quote | Ck Rules

Lead Time: 90 working days | Get best Ship date | Report note: | Screen note:

Date to Ship: Thursday, August 13, 2009

Ship To: Attn / Phone: | Add1: | Add2: | City, St, Zip: | Route:

Customer: Cust mult: 1 | Sales Rep: 0

## Line Details {Tab}

- Click [Add Item]

Quote# 568

Status: Quote 0

Save/Exit | Print

Cancel | Audit

Add Item | Copy Item

Delete Item

Freehand

- Select product (1) Category, (2) Series and Configuration. Change any (3) product options as needed and enter (4) quantity, width, and height. Make any necessary changes to Finish and Glass selections.

TEST CUSTOMER | Ship Date: 11/29/2006 | 0:45 | 1:25

Steps: 1 Category | 2 Series | 3 Configuration | 4 Qty: 1 | Width: 100 | Height: 70 | 5 Glass: CLR5AE21

Category: Doors | Series: Flashwood 1000-1 | Configuration: 0000

Options: Boxing: Cardboard, Edge\_Armor: No, Cylinders: None, Handle\_type: Nail-On, Interlocks: Standard, Ruber: Stainless Steel, Screens: Standard, Still: Standard

Finish: Bevel: CL2 CLEAR ANODIZED, Compound: CL2 CLEAR ANODIZED

Glass: CLR5AE21

Find | Save | Save (add brother)

## Glass Selector

Selected Glass: CLR3MTT | Save | Cancel

1/4" Clear Matte 6mm-T | Update Defaults?

Enter Search Variables

Thickness: 1/4 | Color: CLR | Type: temp | space: | Other: none

Show:  3mm  5mm  6mm | 1000

Description | Glass Part | rules

1/4" Clear 6mm-T	CLR3T	
1/4" Clear Fire Etch Texture 6mm-T	CLR3FET	
1/4" Clear Matte 6mm-T	CLR3MTT	
1/4" Clear Pyrolytic 6mm-T	CLR3PYRO	

- Clicking the [Find] button will open the Glass Selector and allows you to select glass for that product.

Use the search criteria to find the desired glass. Click [Save] once you have made your selection.

- (5) [Save] or [Save + {add another}]

- ii. After saving an item, the Line Details screen will show a summary of the line item, including series, configuration, product options, dimensions, etc. Any product details can be changed from here. However, in order to update pricing to reflect any changes made, you **MUST** click the Refresh button, listed vertically next to the pricing.



**Note:** For every product, Fleetwood’s required lead days (the number of days required from order confirmation to build and ship a product) will appear on the bottom of the screen, below the item Comments box. Ensure that the lead-time to your customer is not shorter than the product with the greatest lead days on an order.

**To change the ship date per order**

- On the Miscellaneous tab, click [Get best Ship date]
  - This will calculate the earliest possible ship date based on the product with the greatest lead time on the quote.

- iii. NFRC Labels – to add NFRC label requests to a line item

In the Line Details tab --

- Click the [NFRC] button – the NFRC SEARCH window will open.

The screenshot shows the 'NFRC SEARCH' window with the following data:

nfrc_entry_descr	grid	grid_s	U_Factor	SHGC
SB60/Air 5mm	N		0.55	0.32
SB60/Air 6mm/5mm	N		0.55	0.32
SB60/Air 6mm	N		0.55	0.32

Additional fields in the window include: Label#: FLE-A-30-00021, U-Factor: 0.55, SHGC: 0.32, VLT: 0.56, Description: Double Glazing - SB60/Air. Product: Norwood 3070-EX, Type: DOOR-MS, Air Leak.

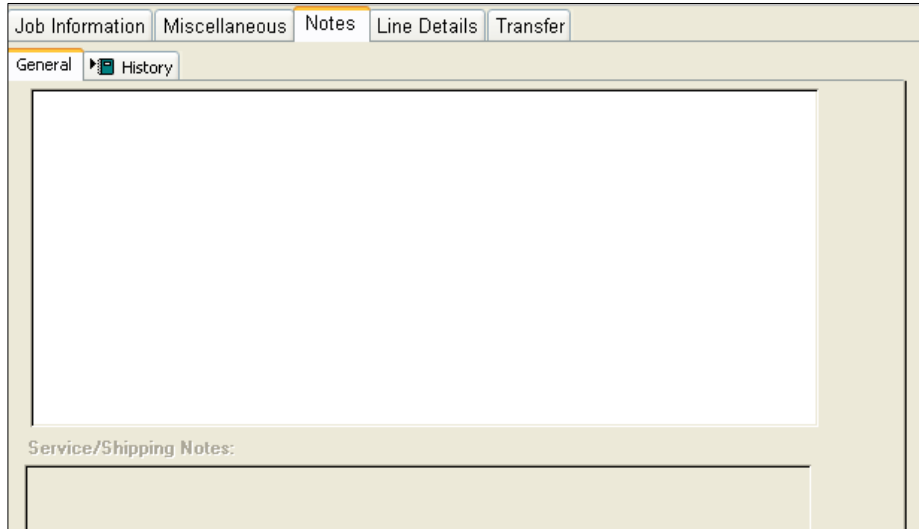
- Make the appropriate selection based on the fill type for that particular line item and double-click it or select it and click [Send to QTE].



## Notes {Tab}

- i. Enter general notes or comments on the [General] tab.
- ii. Enter internal notes on the [History] tab.

The General Comments will appear at the top of your printed quote but the History Notes are for internal reference only and will not print or transfer to Fleetwood when the quote is transferred.

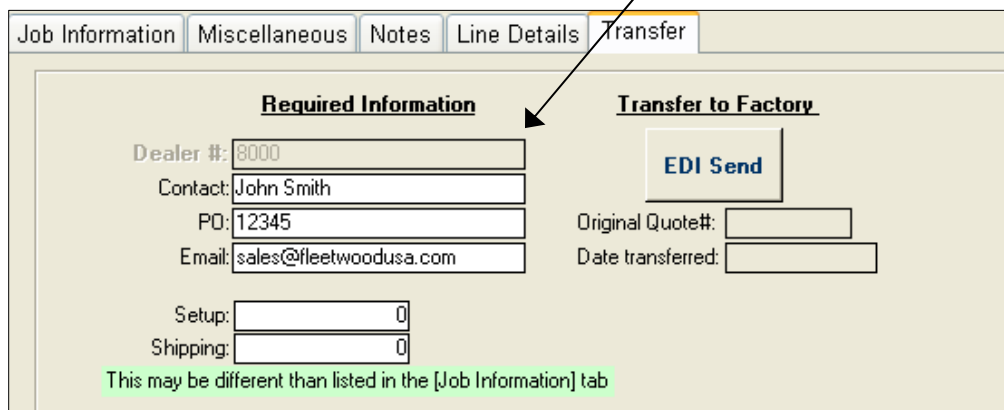


The screenshot shows a software interface with a top navigation bar containing tabs: Job Information, Miscellaneous, Notes, Line Details, and Transfer. The 'Notes' tab is selected. Below this, there are two sub-tabs: 'General' and 'History'. The 'General' sub-tab is active, showing a large empty text area for entering notes. Below the text area is a label 'Service/Shipping Notes:' followed by another empty text area.

## Transfer {Tab}

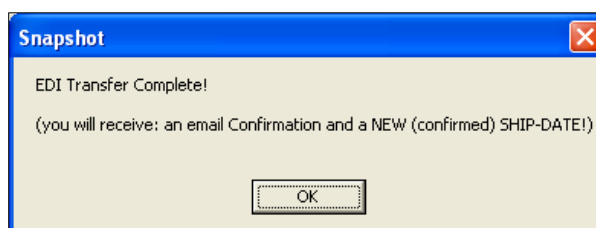
To send your quote/order to Fleetwood:

- i. Complete fields on tab (e.g. Contact, Po, Email) with YOUR information.
- ii. Click [EDI Send].



The screenshot shows the 'Transfer' tab selected in the software interface. It is divided into two main sections: 'Required Information' and 'Transfer to Factory'.  
The 'Required Information' section contains the following fields:  
Dealer #: 8000  
Contact: John Smith  
PO: 12345  
Email: sales@fleetwoodusa.com  
Setup: 0  
Shipping: 0  
A green note at the bottom of this section reads: 'This may be different than listed in the [Job Information] tab'.  
The 'Transfer to Factory' section contains:  
An 'EDI Send' button.  
Original Quote#: [empty field]  
Date transferred: [empty field]  
An arrow points from the 'EDI Send' button to the 'Required Information' section.

- iii. You should see this message if successful! (If not, see **Troubleshooting: EDI Email**)



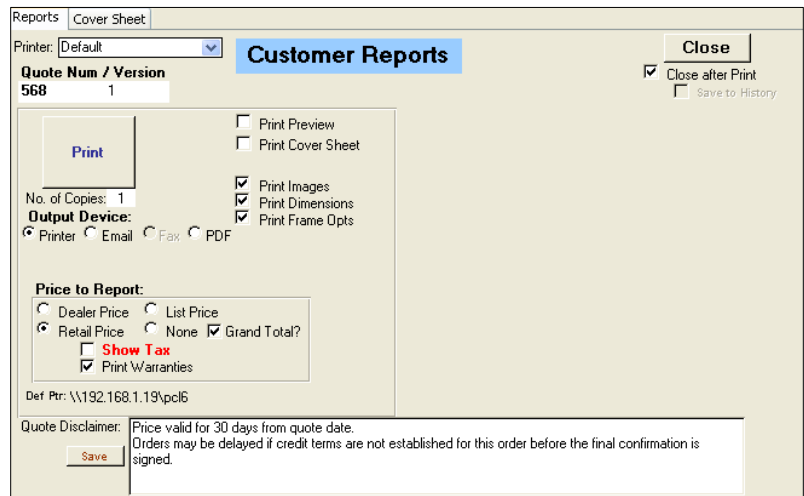
## Printing

- i. Click **[Print]** from the menu on the left side of the screen.



Quote# 568  
Status: Quote 100  
vers: 1  
Save/Exit Print  
Cancel Audit  
Add Item Copy Item  
Delete Item  
Freehand

- ii. Select the price that you want to show on the printed quote.  
(see **Installation & Setup – III. System Administrator – Price to Report**)



Reports Cover Sheet  
Printer: Default  
Quote Num / Version  
568 / 1  
Print  
No. of Copies: 1  
Output Device:  
 Printer  Email  Fax  PDF  
Print Preview  
Print Cover Sheet  
Print Images  
Print Dimensions  
Print Frame Dpts  
Price to Report:  
 Dealer Price  List Price  
 Retail Price  None  Grand Total?  
 Show Tax  
 Print Warranties  
Def Ptn: \\192.168.1.19\pcl6  
Quote Disclaimer: Price valid for 30 days from quote date.  
Orders may be delayed if credit terms are not established for this order before the final confirmation is signed.  
Save

- iii. Select output type:

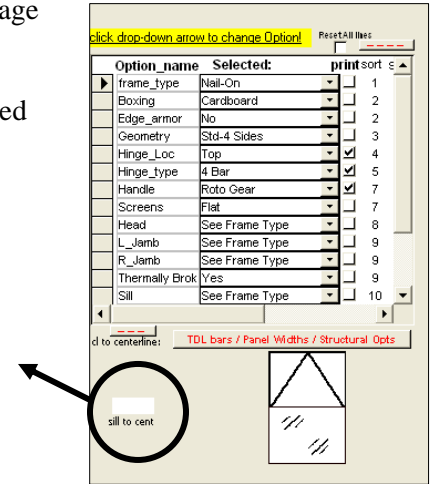
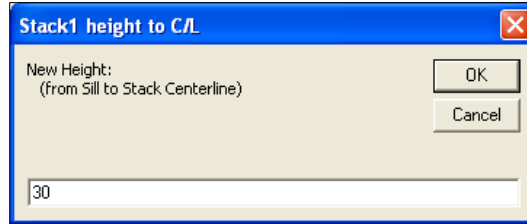
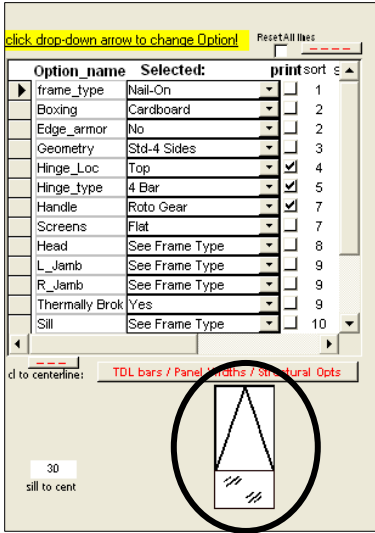
**[Print]** to print quote, **[Email]** to email a .pdf of the quote, or **[PDF]** to create a .pdf of the quote.

## Miscellaneous Order Entry

- **Horizontal Stack Bar**

To adjust the height of a horizontal stack bar in a configuration that includes *only* horizontal stacked lights (ex. PO/O), first add and save the item. Once reviewing the item in the Line Details screen, click your cursor into the box labeled 'sill to cent' to the left of the image (below the options list).

In the dialog box that appears, type in the numerical value of the desired height for that stack bar and click [OK].



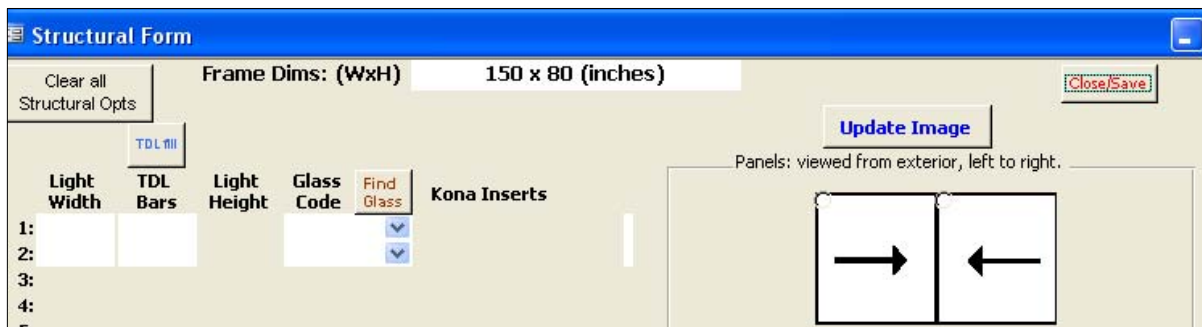
The image will refresh, allowing you to verify the new stack bar height.

- **Special Structural Opts**

In the Line Details screen is a button labeled **[TDL Bars / Panel Widths / Structural Opts]** which can be used to specify special options for an item such as true divided light bars, unequal panel widths and heights, sight line extenders, windload adaptors, and light-by-light glazing.

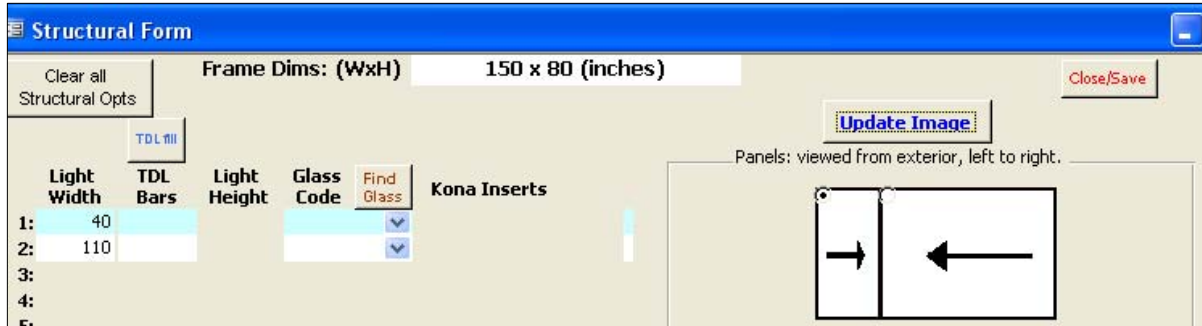
Once you have entered an item and are reviewing it in the Line Details tab, click this button to open the Structural Form.

There will be a specific number of rows corresponding to the number of panels on the line item (for example, an XO door will have 2 rows). For each panel, you can type in the desired special structural option.

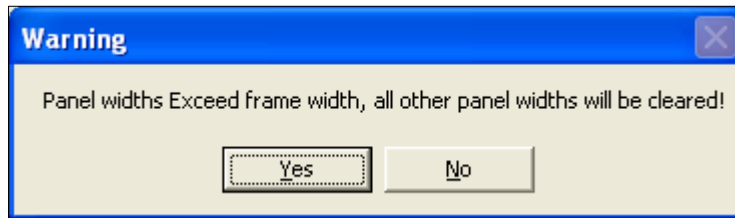


**Light Width:** Used to indicate un-equal panel widths.

1. Type in the desired panel width in the corresponding row/cell.
2. Click [**Update Image**] to update the image and verify the new dimensions.
3. Click [**Close/Save**] when finished and [**REFRESH**] to obtain updated pricing.



**Note:** The sum of all the panel widths must exactly equal the overall width for the product or else you will receive a warning message and all special panel widths will be cleared.



**TDL Bars:** To add a true divided light bar to a panel, type the TDL code into the row corresponding to the appropriate panel.

1. Type the appropriate TDL code in the corresponding row/cell.
2. Click [**Update Image**] to update the image and verify the TDL bar numbers and positions.
3. Click [**Close/Save**] when finished and [**REFRESH**] to obtain updated pricing.

#### **How to create a TDL code:**

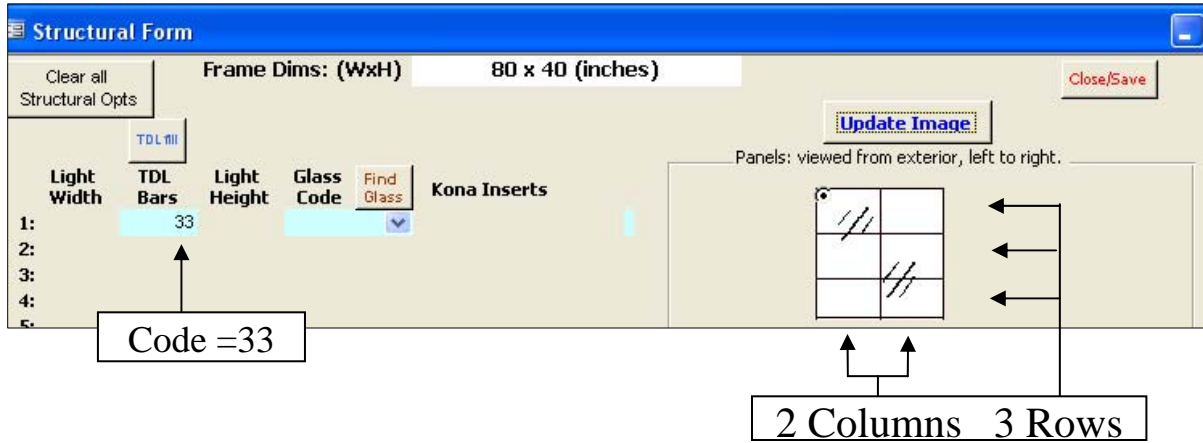
- The number of positions in the code refers to the number of columns per panel.
- Each individual number in the code refers to the number of rows in the corresponding column.

Code Examples (per panel):

33 = 2 columns, 3 rows in each column

143 = 3 columns, 1 row in 1<sup>st</sup> column, 4 rows in 2<sup>nd</sup> column, 3 rows in 3<sup>rd</sup> column

If you prefer to have all panels with the same TDL code, type in the code for the first panel and click **[TDL fill]** and the rest of the panels will automatically be filled in with the same code.

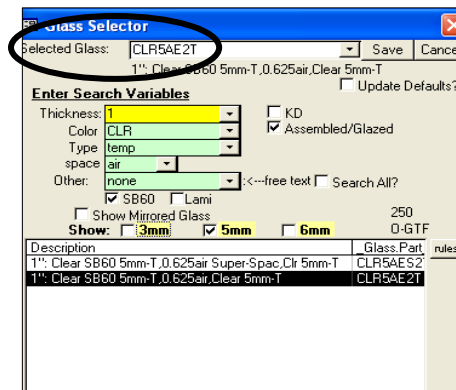


4. Click **[Close/Save]** when finished and **[REFRESH]** to obtain updated pricing.

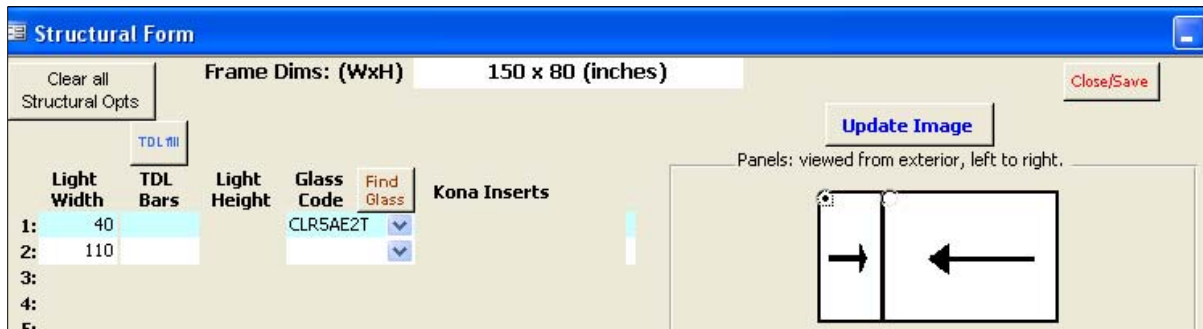
**Glass Code (light-by-light glazing):** Used to specify different glass types per light.

1. Click the **[Find]** button to open the Glass Selector
2. Use the search criteria to find the desired glass
3. Once the desired glass appears in the results box, select it by clicking it once.

The selected glass code and corresponding description will appear at the top of the Glass Selector in the **Selected Glass** field.



4. Copy the code from the **Selected Glass** field by highlighting it and typing **[Ctrl + C]** and **[Cancel]** out of the Glass Selector
5. Paste the glass code into the appropriate row/cell by clicking into the cell and typing **[Ctrl + V]**



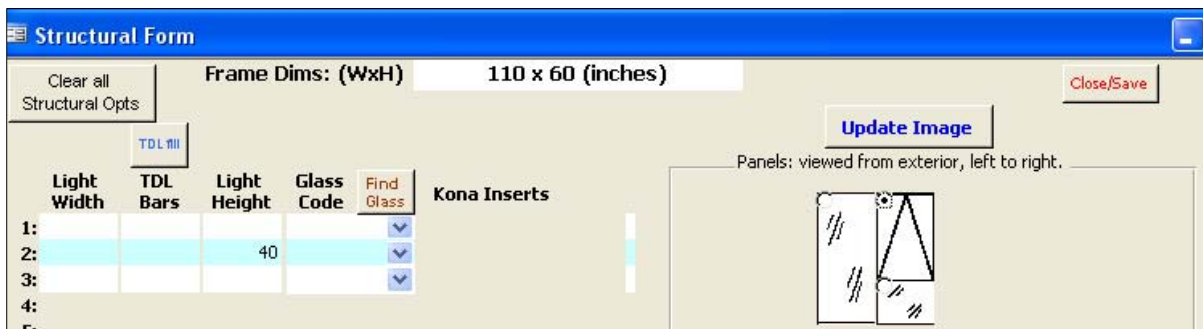
6. Click [**Close/Save**] when finished and [**REFRESH**] to obtain updated pricing.

**Light Height:** Used to adjust the height of a specific light within a vertical stack of lights.



**Note:** The Light Height feature is only available in situations where vertical stacks exist in the configuration, i.e. O|PO/O. Otherwise, if only horizontal stacks exist, i.e. O/X, the Horizontal Stack Bar feature can be used.

1. Type in the desired light height in the corresponding row/cell.
2. Click [**Update Image**] to update the image and verify the new dimensions.



3. Click [**Close/Save**] when finished and [**REFRESH**] to obtain updated pricing.

## C. Customer Table

- Add a New Customer

*Customer Code:* Enter a code for YOUR customer. This code is arbitrary and is chosen by you for your own reference.

(Note: **Do NOT duplicate customer codes!** This will cause errors when printing!)

*Cust. Multiplier:* Select the Multiplier (markup) from your Fleetwood Dealer price.

- You can create standard Multipliers for Retail pricing by clicking the **[add]** button to open the Multiplier table.

(see **Price to Report / Multipliers – 1. Retail-Customer Table – Multiplier Table**)

The screenshot shows the 'Customer Table' application window. At the top, there are search fields for 'Search by Code' and 'Search by Name'. Below these are buttons for 'Audit', 'Close/Save', 'Print', 'Estimator Audit', and 'Create New Quote!'. The main area is titled 'New Customer' and contains a 'Demographics' tab. The 'Cust. multiplier' field is set to 1.25 and has an 'Add' button circled in red. Other fields include 'Customer Code', 'Customer Name', 'Contact', 'Email Address', 'Web Site', 'Phone', 'Fax', 'Mobile', 'Sales Person', and 'Tax (percent/id)'. Below this is a 'Customer Addresses' section with 'Billing' and 'Shipping' sub-sections, each with fields for Address, Address 2, City, State, Zip Code, and Misc. At the bottom, there is a 'Default Notes' section with a 'Print' button and a 'Delete' button.



**Note:** Throughout the quote, your multiplier from Fleetwood (which comes from the .INI file) will appear as “Mult.” and your customer’s markup will appear as “Retail.”

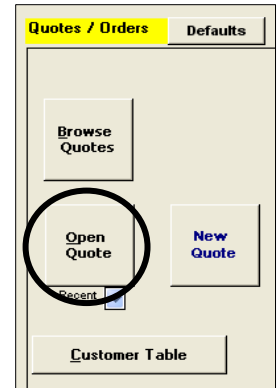
- Search/Edit Existing Customer

Search for an existing customer by name or code in the top left of the screen.

- When finished: Either **Create NEW quote!**, **Close/Save**, or **Update Quote!**

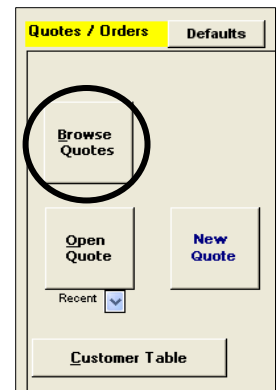
## D. Search Quotes

1. On the Main Menu, click [**Open Quote**].
2. Type in the quote number to be opened and click [**OK**].
3. If the specified quote number is found in the database, the quote will load and open to the [Header Information] tab.
4. If the specified quote number is *not* found in the database, you will receive this message:



## E. Browse Quotes

1. On the Main Menu, click [**Browse**].  
This will open the Quote Browser window, which will show you several details of each quote that has been entered and saved into the database.



**Quote Browser**

qte_	qte_num	qte_suff	qte_vel	cust_cod	cust_descr	job_name	cust_po	cust_contact	status	date_create	date_2ship
84		1		123	Johnny Dealer	Floor wo	Hotel	Mary	Quote	4/23/2007 7:	8/27/2007
82		1		007	Test	110-A		Bill	Transfr	4/19/2007 1:	8/23/2007
66		1		9000	Employee	job name	po	contact	Transfr	3/29/2007 8:	8/2/2007
63		1		456	Joe Contractor	Building #2	951358	Joe	Transfr	3/27/2007 9:	7/31/2007
62		1		9000	Employee	None given			Quote	3/27/2007 9:	7/31/2007
61	USER			123	Johnny Dealer	Doe Residence	159752	Johnny	Quote	3/23/2007 2:	7/27/2007
60	USER			9000	Employee				Quote	3/23/2007 2:	7/27/2007
59		1		500	Mr. & Mrs. Smith	Kitchen Additio	9631	Jane Sm	Quote	3/23/2007 2:	7/27/2007
57		1		001	Suzie Architect	Greehouse Proj	19999	Suzie	Quote	3/23/2007 2:	7/27/2007
56		1		500	Mr. & Mrs. Smith	Bedroom Addit	9632	Bob Smi	Transfr	3/23/2007 2:	7/27/2007
55		1		456	Joe Contractor	Building #1	951357	Joe	Transfr	3/1/2007 3:4	7/5/2007
54		1		123	Johnny Dealer	Doe Residence	159753	Johnny	Transfr	3/1/2007 2:0	7/5/2007
53		1		001	Suzie Architect	Greenhouse Prc	99999	Suzie	Quote	3/1/2007 10:	7/5/2007

2. You can filter the quotes in your database based on specific criteria using the **Filter by** utility.
  - i. Click the **Filter by** drop down
  - ii. From the options listed, select the criteria type with which to search:
    - Qte\_pre
    - Qte\_suff
    - Qte\_num
    - Cust\_code
    - Cust\_descr
    - Job\_name
    - Cust\_PO
    - Cust\_contact
    - Status\_Id
    - Date\_2Ship
    - Ship\_terms
    - ShipTo\_Contact
  - iii. Then type in the specific criteria in the adjacent field, press [**Enter**] when finished.

The results, if any, will appear in the list box below.

If no matches are found, you will see this:



3. Once you have located the desired quote, double-click it to open.

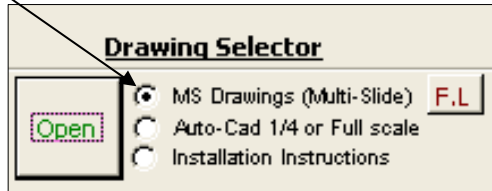


### III. AutoCAD Drawings

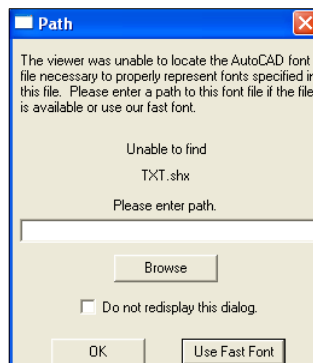


Note: The drawings disc *must* be in CD-rom drive when using the Drawing Selector.

Select Category

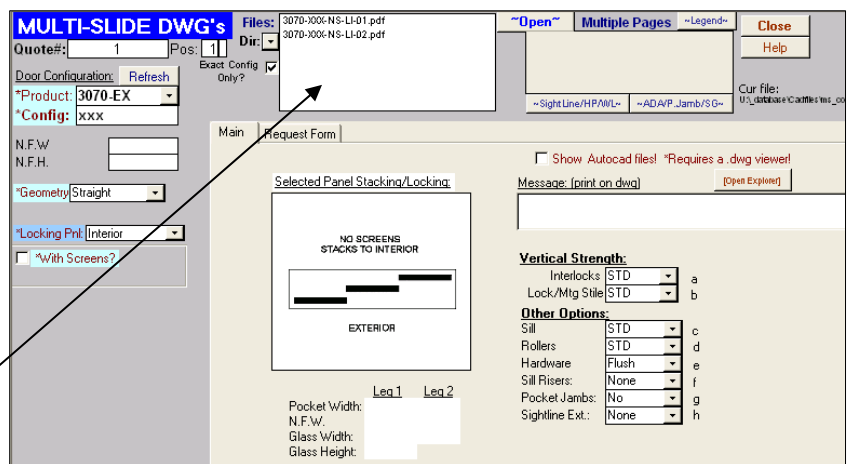


If you receive this message, select [X] **Do not redisplay this dialog** and click [Use Fast Font]



#### A. Multi-Slide Drawings

1. Select Product
2. Select Configuration
3. Enter Net Frame Dimensions
4. Select
  - Geometry
  - Stacking
  - Etc.
5. Screens  
Choose with or without



From the files listed: Select desired drawing by double-clicking it

If there are multiple pages for a drawing, the individual pages will appear in the gray box titled "Multiple Pages."

## B. Auto-Cad 1/4 or Full scale: Architectural Drawings

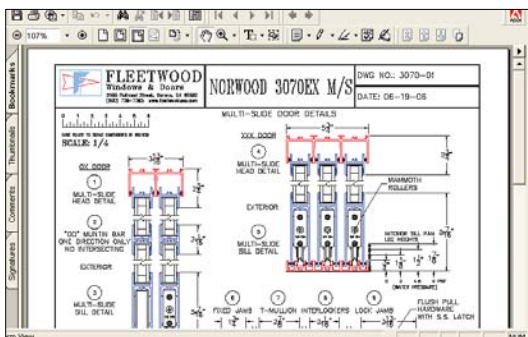
### 1/4" Architectural Drawings

1. Select Series
2. Optional: Select "Show Autocad files!"

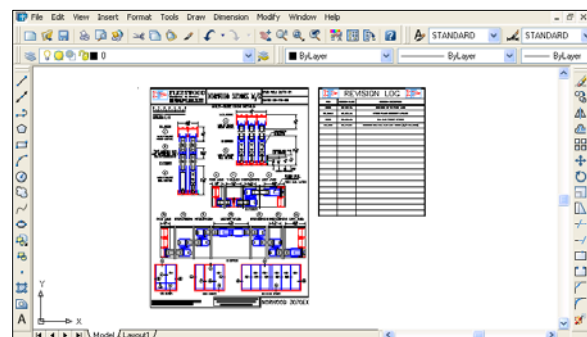
From the files listed: Select desired drawing  
(If dwg file, choose drawing and select **[AutoCAD]** to open)



. pdf file



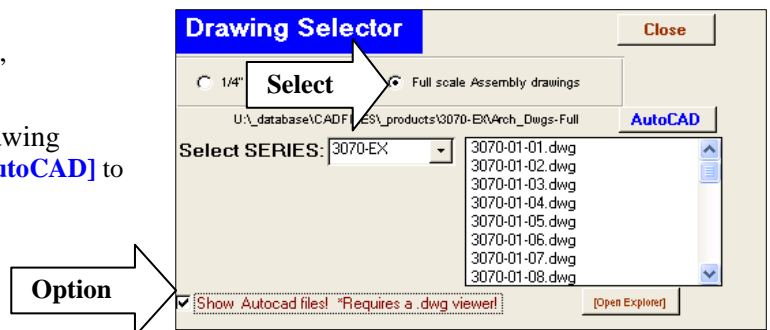
. dwg file



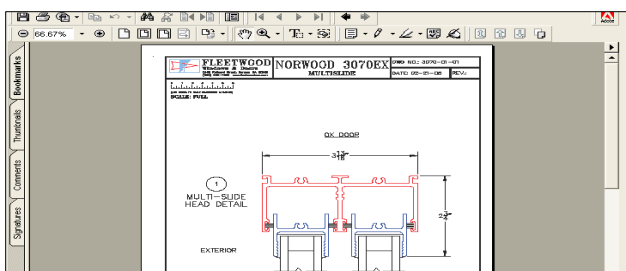
### Full Scale Assembly Drawings

1. Select Series
2. Optional: Select "Show Autocad files!"

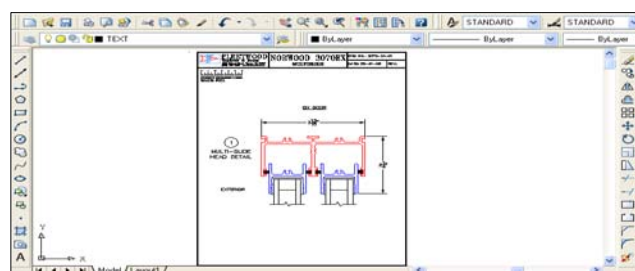
From the files listed: Select desired drawing  
(If dwg file, choose drawing and select **[AutoCAD]** to open)



. pdf file



. dwg file



## IV. Snapshot Estimator Updates

### Database

This update will not be done automatically. If Fleetwood makes any changes to the database, such as bug fixes or upgrades that require you to do an update, Fleetwood will send you a notification, i.e. via e-mail.

Once you receive notification, follow the steps below:

1. CLOSE Snapshot (if open).
2. Type or copy and paste the following link into the address bar of an Internet browser:

[http://www.Fleetwoodusa.net/downloads/Snapshot\\_e\\_update.exe](http://www.Fleetwoodusa.net/downloads/Snapshot_e_update.exe)

3. Follow the instructions on screen:

**Run** (if security warning)

Wait for Download

**Run** (if security warning)

4. You will see the **SNAPSHOT SETUP WIZARD**

Click:     **[YES]**  
              **[NEXT]**  
              **[I AGREE]**  
              **[NEXT]**  
              **[INSTALL]**  
              **[FINISH]**  
              **[YES]**

# ADDENDUM(S)

## MS JET Update Procedure for Windows 2000 Operating Systems

(\*Required on msjet40.dll version 4.0.9 or greater!)

If you are running Microsoft Access on a Windows 2000 machine, a recent MS security update requires that you follow this procedure to replace a .dll file that prevents Access from linking ODBC tables. You will not be able to run Snapshot EDI Transfers without completing this process.

This procedure will replace the older version of MS Jet with the newer version supplied. You cannot replace this file without first putting the operating system in “Safe Mode.”

1. Put operating system into “Safe Mode”

- Click **[Start]** → Shut Down and then select Restart
- As the computer boots up, press the **[F8]** key on the keyboard repeatedly about once every second until you receive a screen titled:  
Windows 2000 Advanced Options Menu
- Highlight the Safe Mode option using the arrow keys on your keyboard and press **[Enter]**

**NOTE:** If your machine continues to boot up to the normal Windows screen, you have missed the setup option. You must revert back to Step 1 and try again.

- After the boot process completes, you will receive a message that states Windows is running in Safe Mode. Click **[OK]**

2. Copy the file MS Jet40.dll

- Go to your C:\Fleetwood\Utilities\ folder and highlight the file
- From the menu below the title bar, click Edit → Copy

You now have a copy of the file.

3. Rename the old MS Jet40 file

- Double click on the folder WinNT
- Double click on the folder System32
- Scroll down until you find the file MSJet40.dll
- Right click on the file and select Rename
- Rename the file ‘MSJet40.old’

You now have a backup copy of the old file.

**NOTE:** You may see a blank screen after you click on the System32 folder. There will be a show files link in blue. Click this link to show files.

4. Paste the New file into \Winnt\System32

On the menu under the title bar, select Edit→Paste. The new file is now inserted.

5. You must Reboot your computer for the changes to take effect.

Click **[Start]** → Shut Down and select Restart.

The update is complete!

## Re-linking the SE\_Tables.mdb database

or

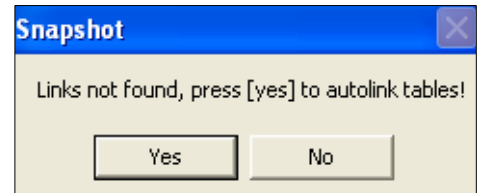
### NETWORKING CLIENT WORKSTATIONS

1. On open of Snapshot, if the link to the supporting tables (se\_tables.mdb and materials.mdb) fails – you will see:

Click [Yes]

or

**To network:** Log in, open the [.INI] window, and then click [Network]



#### Before Networking:

- Install Snapshot on the server  
(Recommended: Create a Fleetwood folder on mapped drive and install Snapshot to that directory.)
- Decide which se\_tables you want on the mapped drive, i.e. the existing information (quotes, customers) from which computer running Snapshot do you want copied onto the network drive.

For *NEW* (clean) se\_tables:

1. Log in to Snapshot from any computer with the program installed
2. From the main Quotes/Orders screen, click [INI]
3. Click [**Reset SE-Tables!**]

**OR**

1. Once you install Snapshot on the server, you will automatically receive a new (clean) se\_tables.mdb

For the *MOST USED* se\_tables:

1. Copy the se\_tables.mdb from the workstation that has used Snapshot the most to the mapped drive

For *COMBINED* se\_tables:

1. E-mail or burn se\_tables from *all* applicable workstations
2. Send to Fleetwood and we will combine tables and send them back as a common se\_tables.mdb database

#### Proceed:

- Replace the newly installed se\_tables.mdb on the server with the **se\_tables.mdb** selected above.

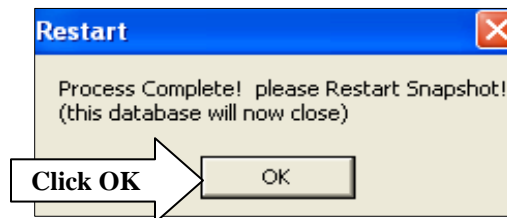
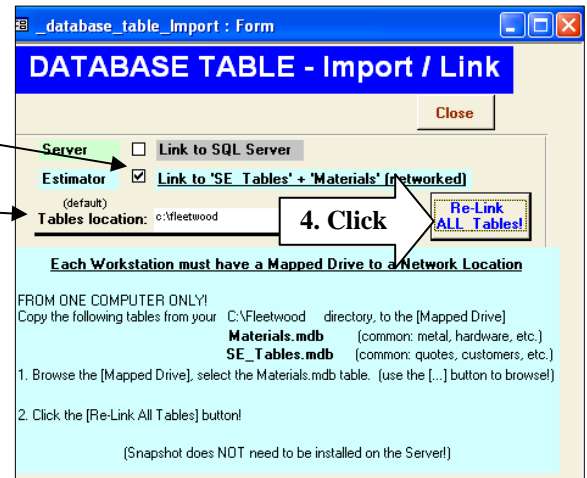


2. Select Estimator [X] Link to 'SE\_Tables' + 'Materials'

3. Enter the Tables location: i.e. C:\Fleetwood

**If networked:** map a Network drive  
Then enter the Map location & Dir:  
i.e. U:\Fleetwood

4. Click **[Re-Link ALL Tables!]**



**If networking:**

#### . INI File Distribution

Place a copy of the default 'snapshot.ini' file on a shared network path for access by networked workstations. This file could then be placed on each workstation's Fleetwood folder, i.e. C:\fleetwood.

#### Database Updates

- All workstations, including the server, need to perform the database updates.



**Note:** All networked workstations MUST be exited out of Snapshot while the server performs the update!

# ODBC Configuration

(Required for Database updates & EDI transfers)

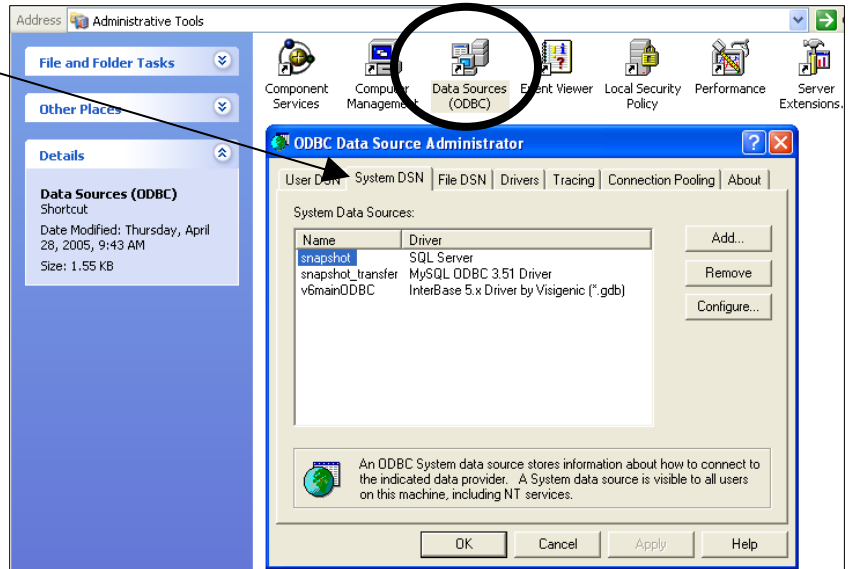
1. Open: Start / Settings / Control Panel / Administrator Tools – ODBC  
(To see Admin Tools, you may need to switch to classic view)

2. Click [System DSN]

3. Click [Add]

4. Select: MySQL ODBC

5. Click [Finish]



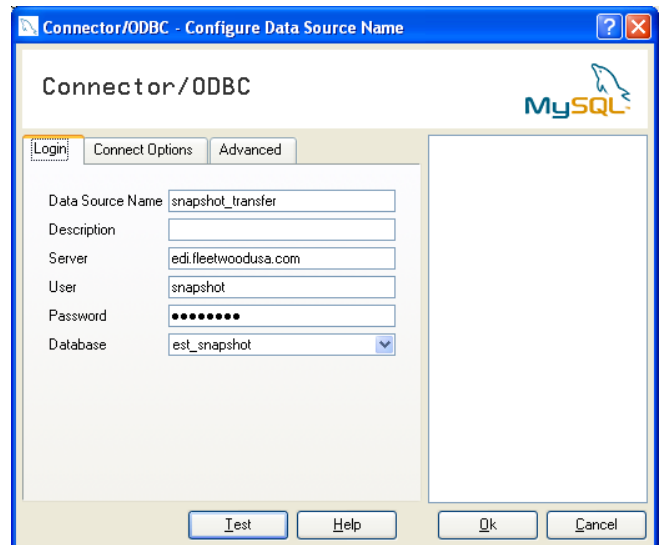
6. Complete Login tab:

Data Source Name: snapshot\_transfer  
Server: edi.fleetwoodusa.com  
User: snapshot  
Password: snapshot  
Database: est\_snapshot

7. Click [Test]

You should get a success message

*If not – Contact Fleetwood IT Department*



**Note:** Windows 2000 Operating Systems  
Please refer to the **MS JET Update Procedure** for additional steps that may be required.

# Installation & Set-up

## I. Minimum System Requirements

### Computer:

CPU: P233 (or greater) (1GHZ Recommended!)  
Memory: 256 (or greater)  
HDD: 80MB (or greater)  
NIC: (network & EDI stations)  
Video: 800 X 600 16 Bit  
Optional Software: Adobe Acrobat Reader, MS Access 2000, WinZip  
Operating System: WinME, Win2K, WinXP, Windows Vista, Windows 7



### Notes:

If you are currently running Microsoft Access 2003, Office Service Pack 2 is required  
If you are currently running Microsoft Access 2003 - Service Pack 3, Microsoft Hotfix is required  
Snapshot is NOT compatible with Microsoft Access 2007

**Internet:** Needed for electronic transfer of orders! (High Speed recommended)

**Fax / Modem**

**Printer**

## II. System Setup

# CD rom Installation

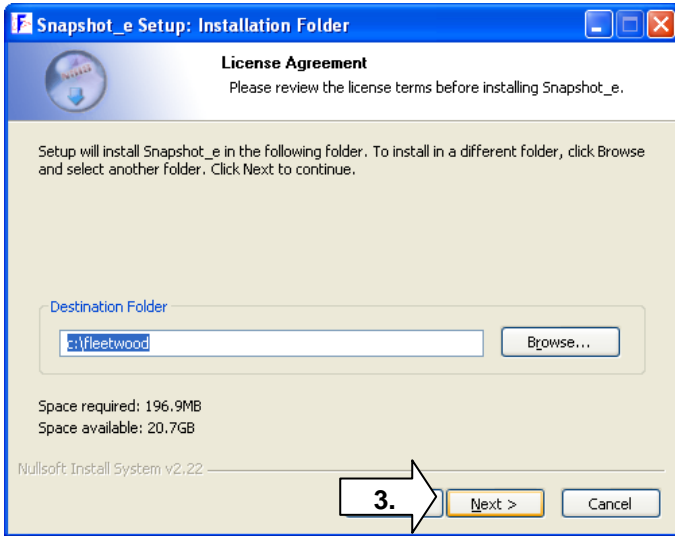
Insert the SNAPSHOT CD into your CD rom drive.

The program should automatically begin the Installation.

(If not: click: **Start/Run:** type: **D:\SETUP.EXE** <where D: is the letter of your CD rom drive>)





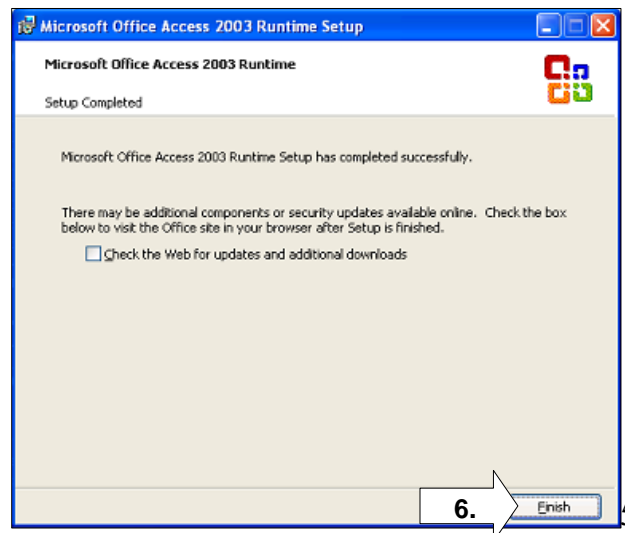
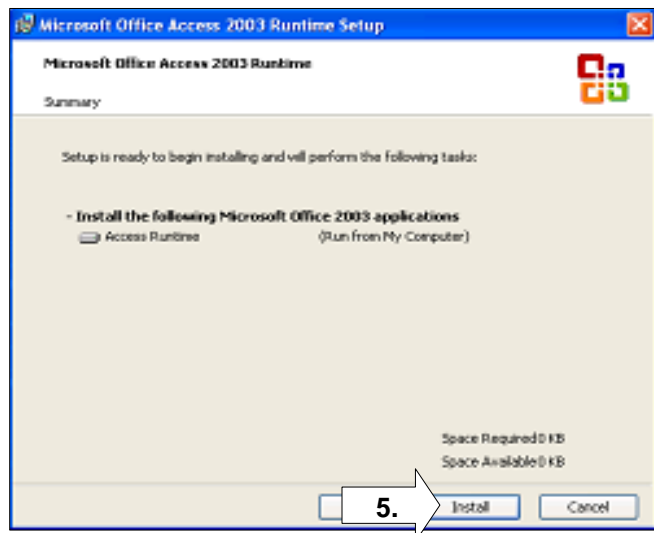


Snapshot uses Acrobat Reader 5.0 to display certain images – Install if needed. **UN-CHECK** if already installed.

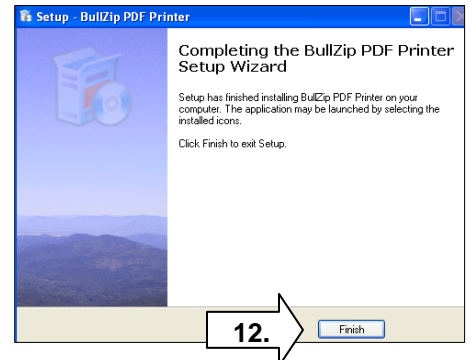
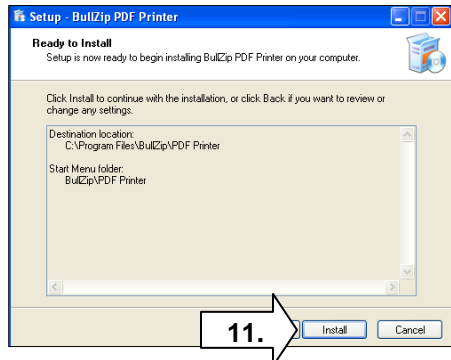
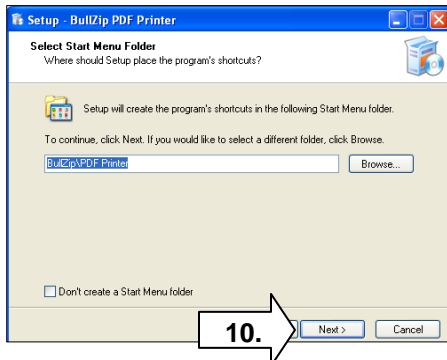
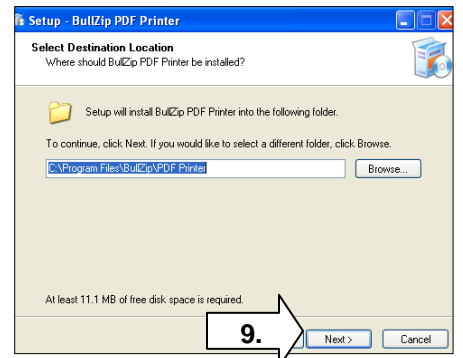
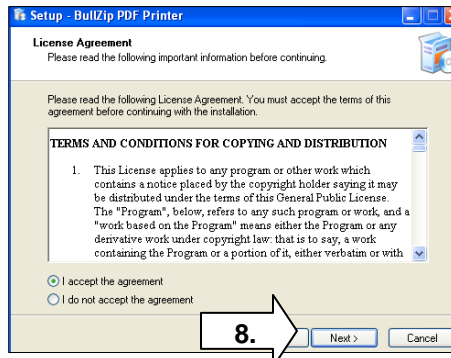
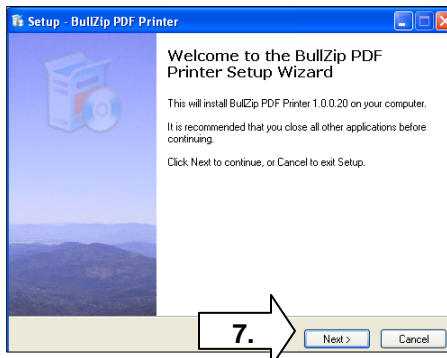


If you have uninstalled Snapshot and are re-installing, **UN-CHECK** Internet Setup and Acrobat Reader.

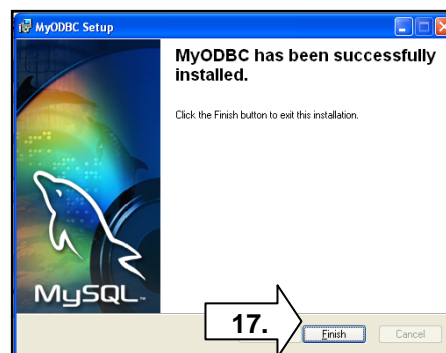
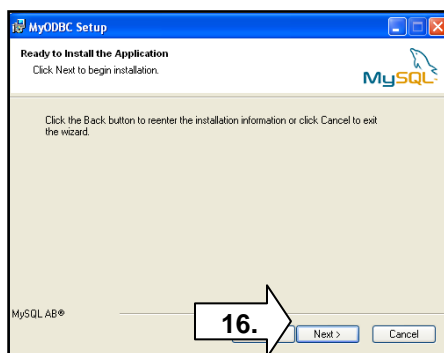
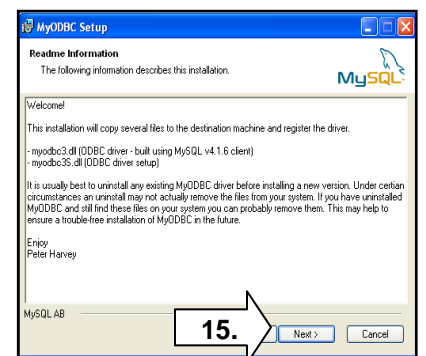
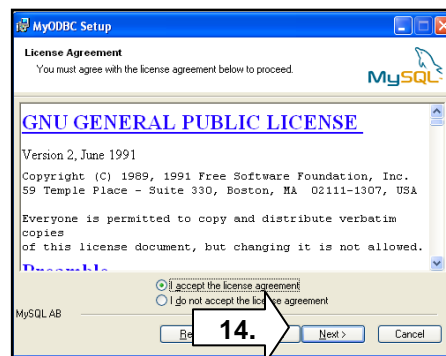
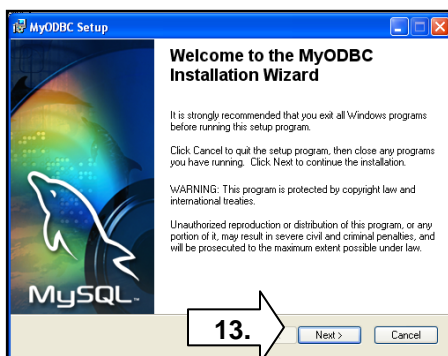
# Microsoft Access



# BullZip Setup



# Internet Setup



# Acrobat Reader



## To launch Snapshot Estimator

Click: START / Programs / Fleetwood / [Snapshot\\_Estimator](#)

OR

Double-click the Fleetwood icon on your Desktop.



### III. System Administrator

#### A. .INI File

The .INI file stores specific information that remains the same (your demographics, your multiplier, etc.) and defaults used when entering new quotes (glass, finish, lead days, packaging, etc.).

To access the .INI file, launch Snapshot and log in using the following information:

**User ID:** Admin  
**Password:** Admin

1. Click [INI] in the top right corner of the Main Menu

**OR**

Click [Defaults] above the Browse button on the Main Menu.

**SNAPSHOT.INI - Defaults**

Manufacturer: FLEETWOOD Windows and Doors  
Comment: Required for Quote Images to load  
Default Login: user Password: user Working Path: c:\fleetwood  
Cadfiles Path: D:  
Support Tables: C:\fleetwood

Estimator Quote Options Printers

Estimator: Multiplier: 0.6 EDI Transfer Defaults: dbase id:  
Dealer Code: 8000  
Name: Contact: John Smith  
Logo specs: 228x150 pixels (bmp jpg gif) Confirm E-mail: sales@fleetwoodusa.com  
Logo (path): c:\fleetwood\documents\dealer  
Address:  
City:  
State: CA  
Zip:  
Phone:  
Fax:  
E-mail:  
Website:  
Default Cust Mult: 1.25

2. [Estimator] tab - fill out your dealer information and EDI Transfer Defaults.

#### **Dealer Logo** (to print on Customer quotes)

Click the [...] button next to 'Logo (path)' and browse to the location on your computer of your dealer logo. Once located, double-click the image to select it.

Specifications: • 226 x 150 pixels 96dpi • .bmp file type

3. [Quote Options] tab - choose default finish, glass, packaging, tax rate, lead time (your lead time to your customer).
4. CAD Files – verify path for AutoCAD files (i.e. CD-rom drive letter)
5. Click [Save]

#### B. Determine Local or Network location for SE\_tables.mdb

You will always *first* install a Local database.

(After setup see **Addendum – Re-linking or Networking**)

## C. Security/ Adding Users

### 1. To add a new user

- a. Log in using User ID/Password = admin/admin.
- b. From the Main Menu, click the **[Security]** button in the top right corner – this will open the User Security form.

**Delete User** **USER SECURITY** **New User** **Close/Save**

0=No Access 3=Add  
1=View 4=Add/Change  
2=Print 5=Add/Chg/Del

0050000009

Quotes: 5

Setup: 9 Qte-Suff Alias

**SELECT USER:**

User ID: admin

Full Name: admin  
Password: user

Department: \_\_\_\_\_ Phone: \_\_\_\_\_  
Job Title: \_\_\_\_\_ E\_Fax: \_\_\_\_\_  
Date of Hire: \_\_\_\_\_ E\_mail: \_\_\_\_\_  
Phone: \_\_\_\_\_ E\_mail\_password: \_\_\_\_\_  
Address: \_\_\_\_\_ E\_mail2: \_\_\_\_\_  
City: \_\_\_\_\_ E\_mail2\_password: \_\_\_\_\_  
St: \_\_\_\_\_ Zip: \_\_\_\_\_ Black\_berry: \_\_\_\_\_  
Notes: \_\_\_\_\_ Nextel: \_\_\_\_\_  
Territory: \_\_\_\_\_  
UDF1: \_\_\_\_\_  
UDF2: \_\_\_\_\_

- c. Click **[New User]**
    - Type in the *new* User ID.
    - Type in a password.
    - Optional: Fill out any other personal information.
  - d. In the drop down next to Quotes, choose the desired security level for the new user.
  - e. Click **[Close/Save]** and **[Log Off]**, and log in with new User ID and Password.
- ### 2. To change the security of an existing user
- a. Log in using User ID/Password = admin/admin.
  - b. From the Main Menu, click the **[Security]** button in the top right corner – this will open the User Security form.
  - c. From the drop down menu next to User ID, select the desired user.
  - d. In the drop down next to Quotes, choose the desired security level.
  - e. Click **[Close/Save]** and **[Log Off]**, and log in as appropriate user.

## D. Price to Report (printed quote) / Multipliers

1. Open quote and click **[Print]** from menu on the left side of your screen.
2. Select the price that you want to show on quote.

- **Dealer Price:** YOUR cost from Fleetwood
- **Retail Price:** Your cost from Fleetwood PLUS whatever markup you have specified
- **None:** No pricing will print

Quote# 568  
Status: Quote 100  
vers: 1  
Save/Exit Print  
Cancel Audit  
Add Item Copy Item  
Delete Item  
Freehand

Reports Cover Sheet  
Printer: [Default] Close  
Quote Num / Version 568 / 1  
Print  
Print Preview  
Print Cover Sheet  
No. of Copies: 1  
Print Images  
Print Dimensions  
Print Frame Opts  
Output Device: Printer Email Fax PDF  
Price to Report:  
Dealer Price List Price  
Retail Price None Grand Total?  
Show Tax  
Print Warranties  
Der Pr: \\192.168.1.19\picb  
Quote Disclaimer: Price valid for 30 days from quote date.  
Orders may be delayed if credit terms are not established for this order before the final confirmation is signed.  
Save

You can specify a Retail multiplier several ways:

- 1) Customer Table – per customer
- 2) [Job Information] tab – per quote
- 3) [Line Details] tab – per line item

See following pages for further instruction on these different options.



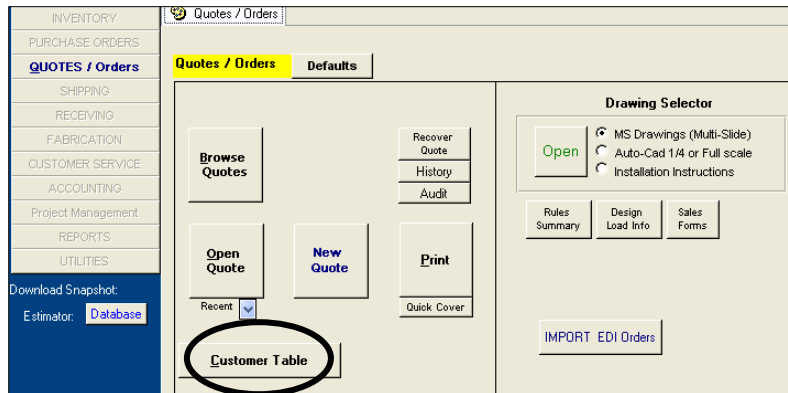
**Note:** Throughout the quote, your multiplier from Fleetwood (which comes from the .INI file) will appear as “Mult.” and your customer’s markup will appear as “Retail.”

# Retail

## (1) Customer Table

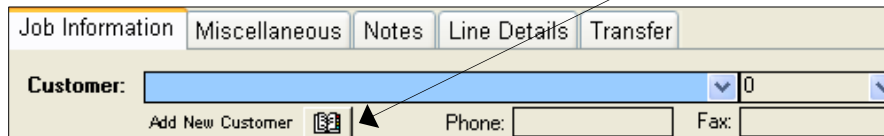
How to specify a Retail multiplier per pre-entered customer.

1. On the Main Menu, click [**Customer Table**].



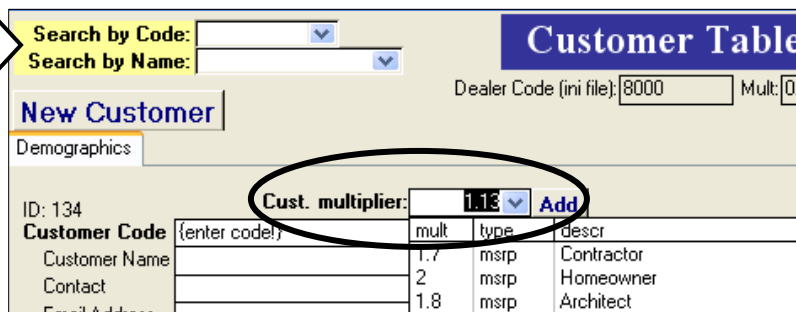
OR

When in a quote, from the [Job Information] tab, click the graphic of the address book.



2. Search for and select your pre-entered customer either by Code or Name.  
(To enter NEW customers, see **II. Data Entry – C. Customer Table – Add a New Customer**)

Search pre-entered customers here



3. Select the Multiplier (markup) from your Fleetwood Dealer price by clicking the drop down next to the [**add**] button and selecting from the list of pre-entered multipliers *or* click the [**Add**] button to open the Multiplier table.

## Multiplier Table

1. Select the Type as 'MSRP.'
2. Enter the Multiplier to be used for markup.

Multipliers will calculate the Retail based on Dealer Price.

Ex) Multiplier = 1.5 → **YOUR** cost **PLUS** a 50% markup

Dealer price: \$1000 x 1.5 mult. = \$1500 Retail

3. Enter a Description for your reference.
4. [Close] Multiplier table.

id	type	Multiplier	Description
11	msrp	1.25	Silver Dealers
14	msrp	1.25	Bronze Dealers
12	msrp	1.39	Transition Dealers
13	msrp	1.52	Gold Dealers
15	msrp	1.62	Platinum Dealers
* (toNum)	msrp	1	

MSRP\$ = Dealer NSP\$ \* msrp\_multiplier

When finished: Either **Create NEW quote!**, **Close/Save**, or **Update Quote!**

- ✓ All items added to a quote with this customer selected will automatically calculate Retail using the specified multiplier.

### \*FYI\*

When reviewing the entered items in the [Line Details] tab, YOUR cost from Fleetwood will appear as '**Dealer**,' which corresponds to the 'mult' multiplier, and the marked up price will appear as '**Retail**,' which corresponds to the 'retail' multiplier.





# Retail

## (2) [Job Information] tab

How to specify a Retail multiplier on a per quote basis.

1. Open quote.
2. On the [Job Information] tab in the upper right half of the screen, locate the Retail fields.
3. Click your cursor into the 'retail' field and type in the desired multiplier to be used for markup.

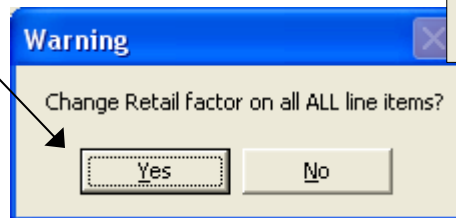
Multipliers will calculate the Retail based on Dealer Price.

Ex) Multiplier = 1.5 → **YOUR** cost **PLUS** a 50% markup

Dealer price: \$1000 x 1.5 mult. = \$1500 Retail

On your keyboard, press **[Enter]** when finished.

Select **[Yes]**



A screenshot of the 'Update Pricing' section in a software interface. It includes a checkbox for 'Show Dealer Costs' which is checked. Below it, it says 'Does NOT Include: Setup, Shipping, or Tax'. There are fields for 'Dealer Price' (\$2,495.35), 'Mult.' (0.600), 'Retail' (\$2,819.74), and 'retail' (1.130). There are also fields for 'Tax Rate' (11.0000%), 'Setup' (\$0.00), 'weight' (865.45), and 'Shipping' (\$0.00), 'cube' (71.02). A black oval highlights the 'Retail' and 'retail' fields, with an arrow pointing to it from the text 'Click into here'.

Click into here

- ✓ Pricing for all items on this quote will be calculated with the new Retail multiplier.

### \*FYI\*

When reviewing the entered items in the [Line Details] tab, YOUR cost from Fleetwood will appear as '**Dealer,**' which corresponds to the 'mult' multiplier, and the marked up price will appear as '**Retail,**' which corresponds to the 'retail' multiplier.



## Retail

### (3) [Line Details] tab

How to specify a Retail multiplier on a per line item basis.

1. Once an item has been added, review it in the [Line Details] tab.
2. In the top center area of the screen, locate the Dealer and Retail pricing.
3. Click your cursor into the 'retail' field and type in the desired multiplier to be used for markup.

<b>Dealer:</b>	<b>\$2,495.35</b>	R E T A I L
<b>Retail:</b>	<b>\$2,819.74</b>	
mult 0.6	retail 1.13	

Click into here

Multipliers will calculate the Retail based on Dealer Price.

Ex) Multiplier = 1.5 → **YOUR** cost **PLUS** a 50% markup  
Dealer price: \$1000 x 1.5 mult. = \$1500 Retail

On your keyboard, press **[Enter]** when finished.

- ✓ The Retail price for that item will re-calculate based on the newly entered multiplier.

#### \*FYI\*

When reviewing the entered items in the [Line Details] tab, YOUR cost from Fleetwood will appear as '**Dealer**,' which corresponds to the 'mult' multiplier, and the marked up price will appear as '**Retail**,' which corresponds to the 'retail' multiplier.



# Troubleshooting

## ➔ Bar code

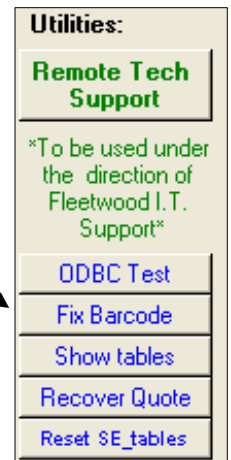
Each quote that is printed should print with a unique bar code in the top right, next to the quote number.

If you are noticing that the bar code is not printing on your quotes and you are instead seeing

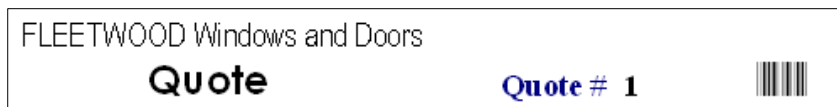


follow the instructions below:

1. Open [**Quote Defaults**] on the Main Menu.
2. On the Quote Options tab, click [**Fix Barcode**], listed under Utilities.
3. From your Windows browser, locate C:\WINDOWS\fonts folder or C:\WINNT\fonts folder, depending on your operating system.
4. Double-click the Fonts folder.
5. [**Cancel**] out of the Windows browser and [**Cancel**] out of the Quote Defaults.

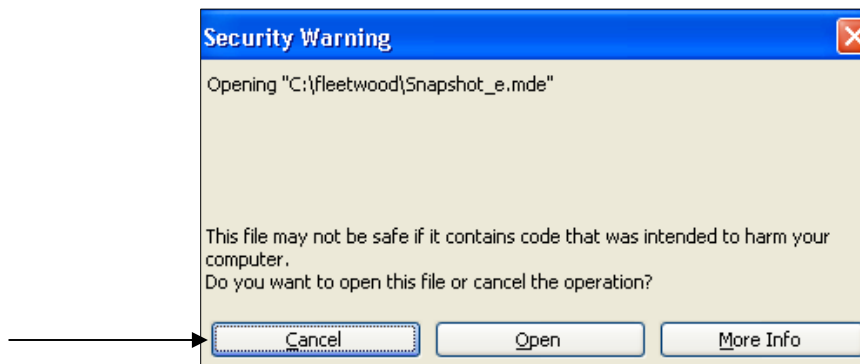


All quotes should now print with a bar code.



## ➔ Security Warning – Microsoft Access 2003

If you are running Microsoft Access 2003, you will receive a security-warning message every time Snapshot is opened.



The security level **MUST** be changed in order to ensure the proper functionality of Snapshot. Follow the steps below to change the security level in Microsoft Access.

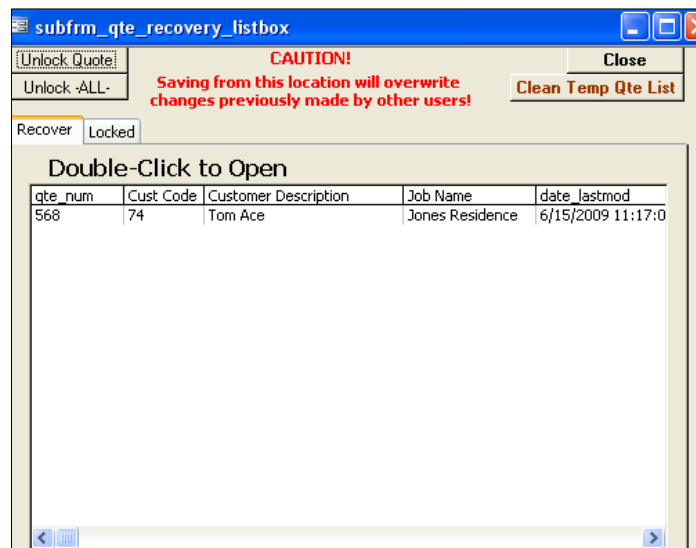
1. Once this security message appears, choose [Cancel].
2. On the Microsoft Access Tools menu, hover the mouse over “Macro” until a menu to the right appears. From this menu, click “Security.”
3. Select Low (level).
4. Click [Yes] to a message asking if you want to allow the evaluation of potentially unsafe expressions.
5. Click [OK] to a message informing you that you must restart your computer for the new security to take effect.
6. Manually restart your computer and re-enter Snapshot.

The security-warning message will no longer appear when you enter Snapshot.

## ➡ Recover Quote

If you lose a quote due to system failure (i.e. computer crashes) or unintentionally canceling out of it without saving, there is a feature to recover it.

1. On the Main Menu, click [Recover Quote].
2. A window will open listing all the quotes that have been recently accessed. However, if a Snapshot Estimator update has been run, the Recover Quote will only list quotes accessed *since* the update.



3. Double-click the desired quote to open it.

Please note that once accessed, you will need to [Save/Exit] and re-enter the quote before continuing.

## ➔ EDI Email

If you experience problems transferring Snapshot quotes via the default Transfer tab mechanism, there is a second option that allows you to send quotes using Microsoft Outlook.

1. From the Main Menu, open **[Defaults]**.
2. Under the **Transfer** Options section, check the **[X] E-Mail Option** and then the **[X] MS Outlook** checkbox.

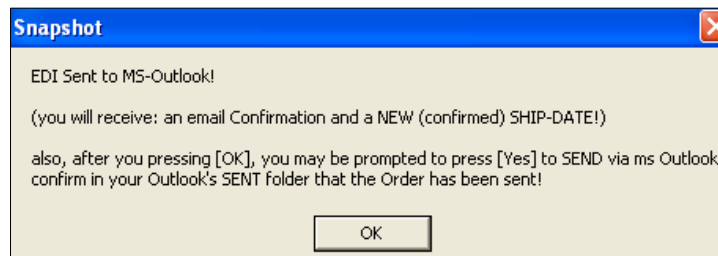


**Transfer Options:**  
 EDI - ODBC option  E-Mail option  Functional ODBC?  
**Email Options:**  
 MS Outlook  VB Mail  Require Authentication  
Email - SMTP server: mail.fleetwoodusa.com  
Email - from address: snapshot@fleetwoodusa.com

3. **[SAVE]** and re-enter the quote to be transferred.
4. On the **Transfer** tab, the EDI button will now read **[EDI (email)]** instead of **[EDI Send]**.
5. Click **[EDI (email)]**

**EDI (email)**

You should receive this message if successful:



6. Snapshot will automatically create an email with the quote information as an attachment.
  - Please *verify* that the email has been sent by looking in the Microsoft Outlook “Sent Items” folder. The email is sent to **Snapshot@fleetwoodusa.com** and will read:

“EDI Transfer from (Dealer code) qte (Quote #)”



**Note:** You may need to open Microsoft Outlook in order for the program to send the email.

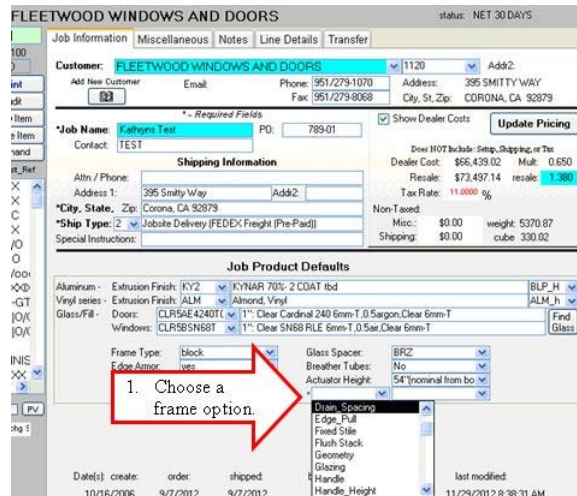
# ADDENDUM: Data Entry Training Guide

## Global Frame Option Update

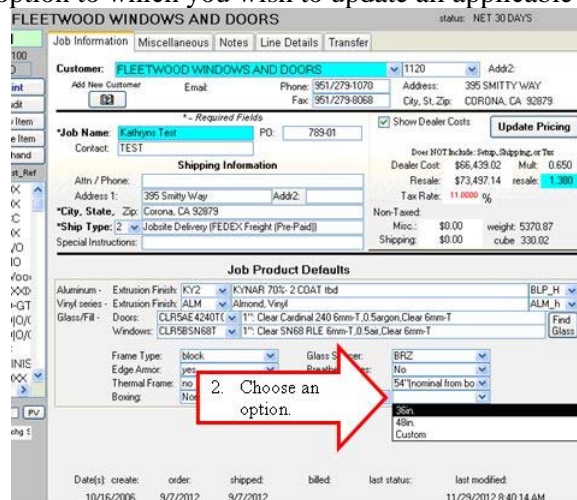
11/29/2012

On the [Job Information] tab of a quote is a dynamic, global frame option that can be used to update all applicable items on a quote.

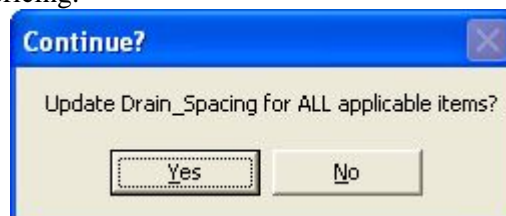
1. Click the drop down to reveal a list of ALL available frame options for all products. Select the option type you wish to update.



2. Click the drop down just to the right to reveal a list of all available frame options for the selected option type. Select the option to which you wish to update all applicable items on the quote.



3. Snapshot will immediately prompt you to update all items on the quote - select [Yes]. All applicable options on all applicable items on the quote will be updated with your selection, and will require a refresh to obtain updated pricing.

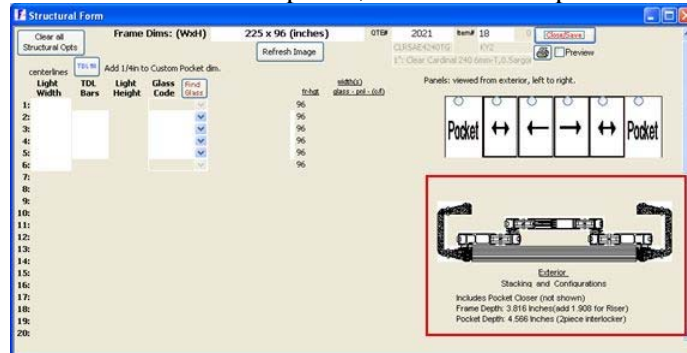


# ADDENDUM: Data Entry Training Guide

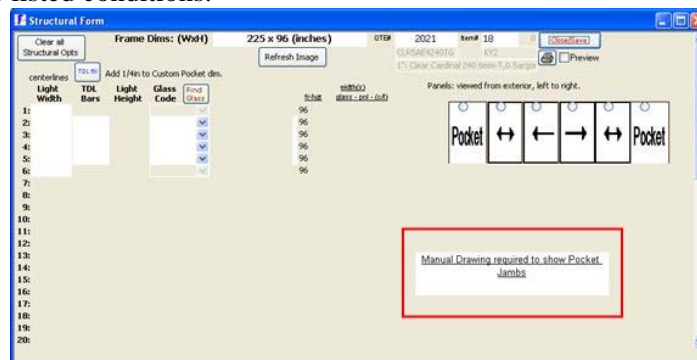
## Multi-Slide Door Plan View Image

11/29/2012

In the [Extra Customization] window for a multi-slide door is a plan-view image of the door which includes the configuration and selected frame options, with some exceptions.



For example, the plan-view image will not show where: the number of screen tracks is not equal to the number of screen panels, the pocket jamb of an Open Pocket, meeting stiles where there is a thumb-turn actuator, etc. In these cases, a message will appear on the screen, notifying the user that a manual drawing is required to show the listed conditions.



The plan view can be printed by clicking the printer button in the top right corner of the Extra Customizing window. The printed report will show the item just like it appears on a standard printed quote (including series, configuration, sizes, frame options) but with the plan view image below the elevation image.

Notes:

ITEM: **(18-0) Norwood 3070-EX-NO SCREENS (PXXIXXP)**

Viewed from Exterior  
 D/D: 225 x NFH: 96  
 ~ NFW=352.5 Pk16 + Pk12.54

PLAN VIEW

Includes Pocket Closer (not shown)  
 Frame Dep th: 3.816 Inches (add 1.908 for Riser)  
 Pocket Dep th: 4.566 Inches (2-piece Interlock)

Customer to confirm Stacking and Configuration: (Required Signature)

Option Name	Option
Stacks to	the Interior (reating Left to Right)
Stil	Riser (Outside)
Handle	Arche type Flush Pulls
Actuator	Arche type II
Actuator Height	54" (nominal from bottom of sill)
Pocket_LSL_endr	3.5In (Arche type)

Qty: 1

Rmsh: \*KYBAR TD= 200 AT Bd (KY20 USTD M)  
 (Hardware: Brushed Stainless Steel)

Frame: Block (KD)

Glsing: 1" Clear Cardinal 240 6mm-T,D,Sagon,Clear 6mm-T (Glazed)

rep act: BRZ

Screen s: none

WeglarB: 516.16 Cnber/th: 26.32

Boxing: cartboard

# ADDENDUM: Data Entry Training Guide

## Glass Widths, Panel Widths and Centerlines

11/29/2012

In the [Extra Customization] window, if the automated cut sheets for a product, the entered configuration and the selected frame options have been validated, the glass widths, panel widths and centerlines will appear to the left of the elevation image.

In the example below, for the O panel, 36.938 is the glass width, 38.75 is the panel width, and 38.418 is the centerline. For the X panel, 36.938 is the glass width, 41.688 is the panel width, and 41.582 is the centerline.

The screenshot shows a software interface for window configuration. At the top, it displays 'Frame Dims: (WxH) 80 x 96 (inches)'. Below this, there are several input fields and buttons, including 'Clear all Structural Opts', 'Refresh Image', and 'Close/Save'. A table of dimensions is visible, with a red box highlighting the 'width(s)' column. The table has columns for 'fr-hgt', 'glass - pnl - (c/l)', and 'Panels: viewed from exterior, left to right.' The table contains two rows of data: one for the O panel and one for the X panel.

	fr-hgt	width(s) glass - pnl - (c/l)	Panels: viewed from exterior, left to right.
1:	96	36.938-38.75 (38.418)	
2:	96	36.938-41.688 (41.582)	
3:			
4:			
5:			