

Introduction and System Requirements

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 - Pair/Set
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-
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Welcome to DoorBuilder Live!

Masonite Architectural is excited to bring you our newest digital product for estimating and order writing.



Estimate, order and reduce errors with our new and improved DoorBuilder™ Live.

The intuitive cloud-based software cuts down on training time and streamlines the entire door ordering process for fast, accurate results — every time.

Increase efficiency and get simplified door solutions for the whole building with our enhanced system.

DoorBuilder Live was created with your needs in mind. Many of the system functions, screen flows, and program enhancements were developed using your feedback and the years of experience cultivated by our own employees. A few of the exciting features in the new system are:

- Agile technology allows us to quickly respond to the changing customer & market needs.
- Complete product offering within the system, reduces the need for manual overrides.
- Improved door configuration logic so you can quote and order with confidence.
- Learning curve for new employees reduced from months to weeks.
- Speed numbers built using your stock SKUs to allow for streamlined replenishment.
- Fully integrated into Masonite Architectural's new ERP system

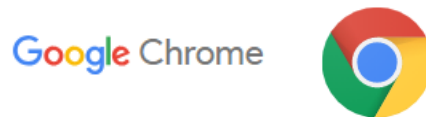
System, Internet & Browser Requirements

As you get started using system, you'll want to be sure you have the tools required for the best experience our product has to offer. Please review this section to ensure your computers and internet meet the minimum requirements.

DoorBuilder Live has been optimized to work best in the Google Chrome browser. The DoorBuilder Live system is a web-based program which requires a sufficient amount of internet bandwidth to deliver the best experience for our customers.

The following computer and internet specifications are recommended:

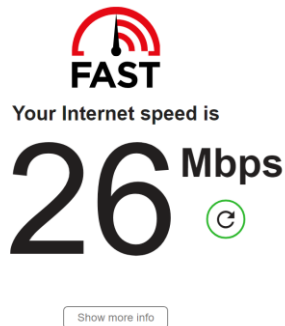
Microsoft Operating System & Internet	
Operation System	Windows 8 or greater
CPU	2.4 Ghz processor or better
Memory	4 GB RAM
Hard Drive	10 GB free space
Internet Speeds	10 Mbps or greater
Browser	Google Chrome



Internet Speeds

Not sure how much internet bandwidth your company has? Try using one of the online speed tests to determine your internet capacity. Example sites, such as www.fast.com, can provide this information. The results from these sites can vary widely based on your region, so to determine the best testing site for your bandwidth, please contact your internet provider.

This is a sample result from fast.com.



**Please note that Masonite does not recommend any specific speed testing site; customers must contact their internet provider for their specific speed test.

HOW TO GUIDE

System Access


DoorBuilder Live allows users to design, specify, estimate and order with confidence. Our digital solution leverages a complex, rules-based engine and an extensive hardware database which ensures only valid product configurations can be created. DoorBuilder Live streamlines the current, paper-based processes by:

- **Eliminating order entry errors** by allowing only valid configurations and no more rekeying
- **Reducing lead time** by eliminating bottlenecks, mistakes and unnecessary extra costs
- **Accelerating on-boarding** by reducing the learning curve

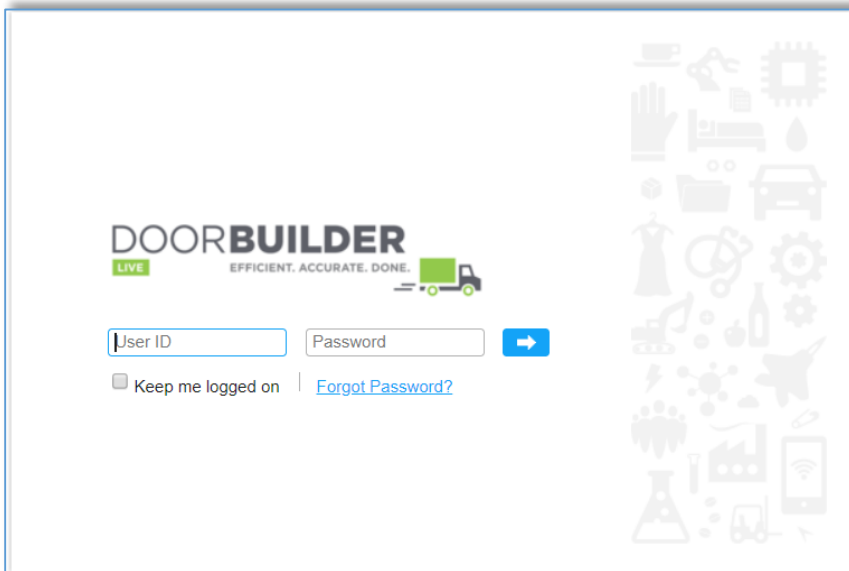
System Requirements

DoorBuilder Live is designed to work best with **Google Chrome**.

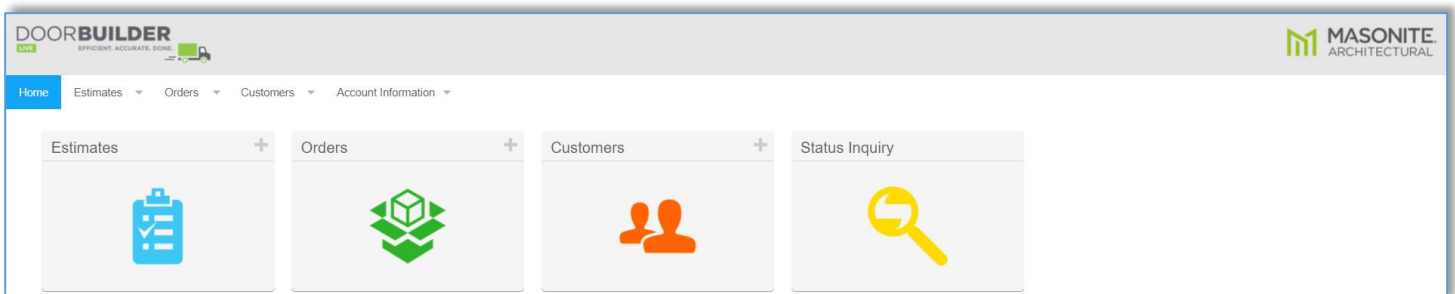
Log On

1. Enter the DoorBuilder Live URL, <https://DoorBuilder.masonite.com> in your browser.
2. Enter your User ID and Password on the DoorBuilder log in screen and select the [] button to the right of the Password field.

TIP: The Password field is case sensitive, make sure the caps lock key off and that you are using the correct case for your password.



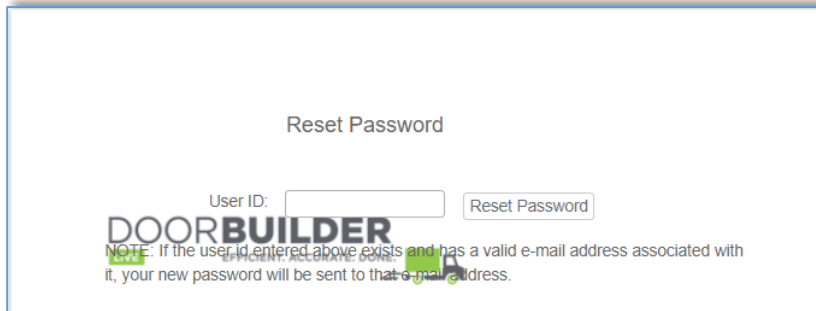
3. Upon successful logon you will be presented with the DoorBuilder Home page.



Password Reset

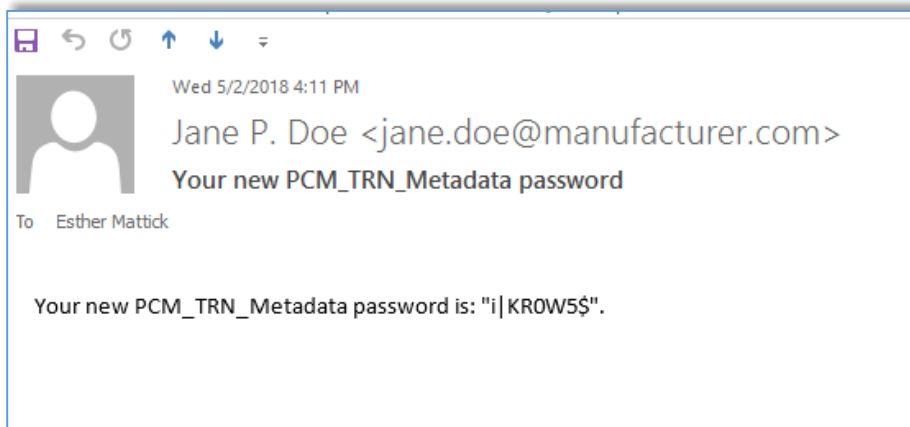
If you are having trouble logging in or have forgotten your credentials click on the [Forgot Password?](#) link which will launch the **Forgot Password** screen.

1. Enter the User ID associated with your account and select the **[Reset Password]** button. An email will be sent containing your Username and a temporary Password.



The screenshot shows a web form titled "Reset Password". It features a "User ID:" label followed by a text input field and a "Reset Password" button. Below the input field, there is a "NOTE" in green text: "NOTE: If the user id entered above exists and has a valid e-mail address associated with it, your new password will be sent to that e-mail address." The "DOORBUILDER" logo is visible in the background.

2. In your email, you will receive a similar message to the one below.

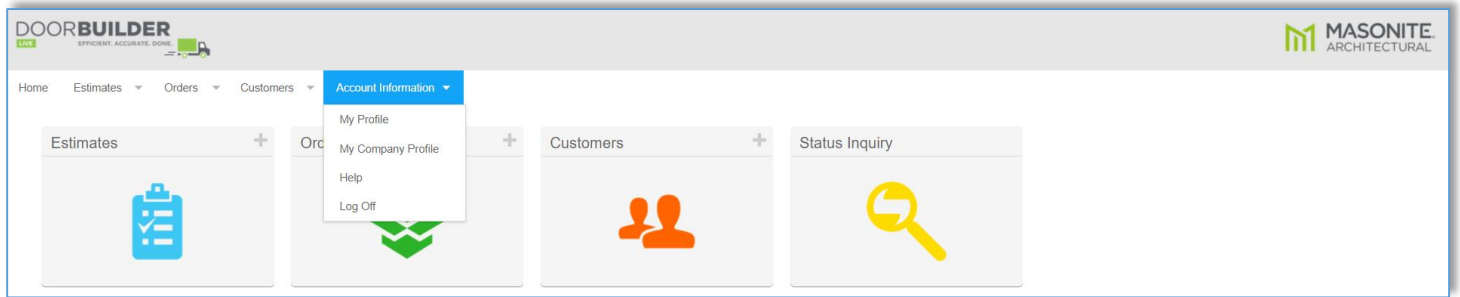


3. Use your User ID and the new temporary password to log on, then change your password.

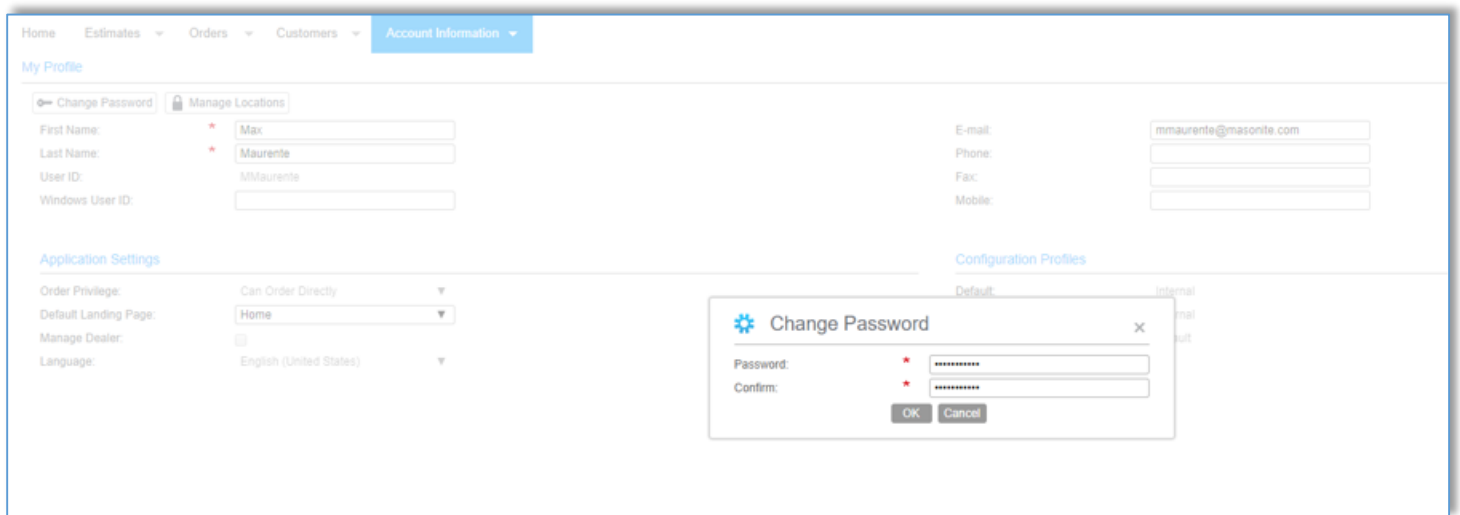
Change Password

If you are logging on for the first time or had your password reset, follow the steps below to change your password.

1. Select **My Profile** from the **Account Information** drop down list, you will be taken to the My Profile screen



2. Select the **Change Password** button under My Profile. You will be prompted to enter a new password.



The DoorBuilder Live support process is designed to answer your questions and provide help with using the system:

- **System Issues** – in the event DoorBuilder Live is not functioning as expected
- **Hardware Listing Needs** – for hardware compatibility questions and missing hardware templates
- **Pricing Issues** – includes help for any missing or incorrect
- **Product & Training Requests** – ask product questions or arrange for supplemental DoorBuilder Live training

Note: Support of the legacy DoorBuilder desktop solution will continue to be addressed through the existing process.

Communication

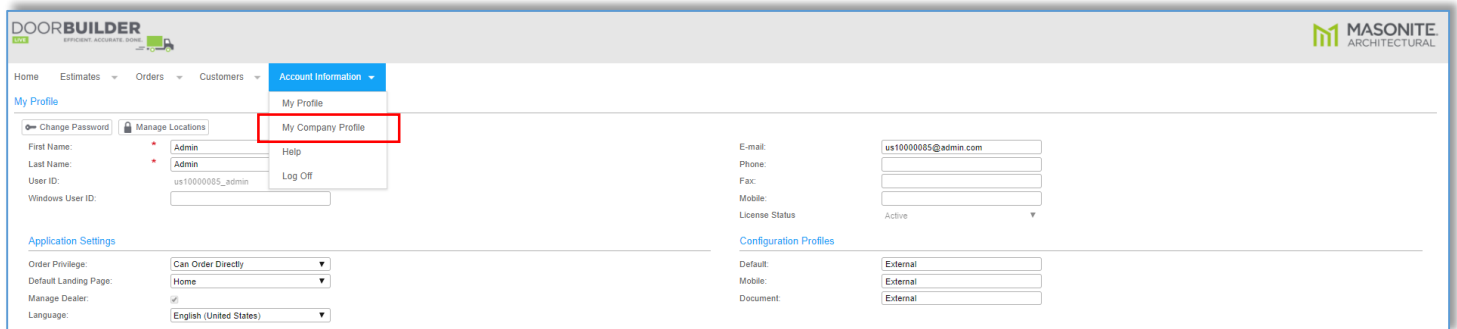
To request additional help with DoorBuilder Live, please contact your Masonite Sales Rep by phone or email. Your rep will help with the request, or put you in contact with the appropriate Masonite specialist to resolve your inquiry.

Please have all relevant DoorBuilder Live Estimate or Order information available when contacting us for help so we can answer your questions as quickly as possible.

Create User Accounts

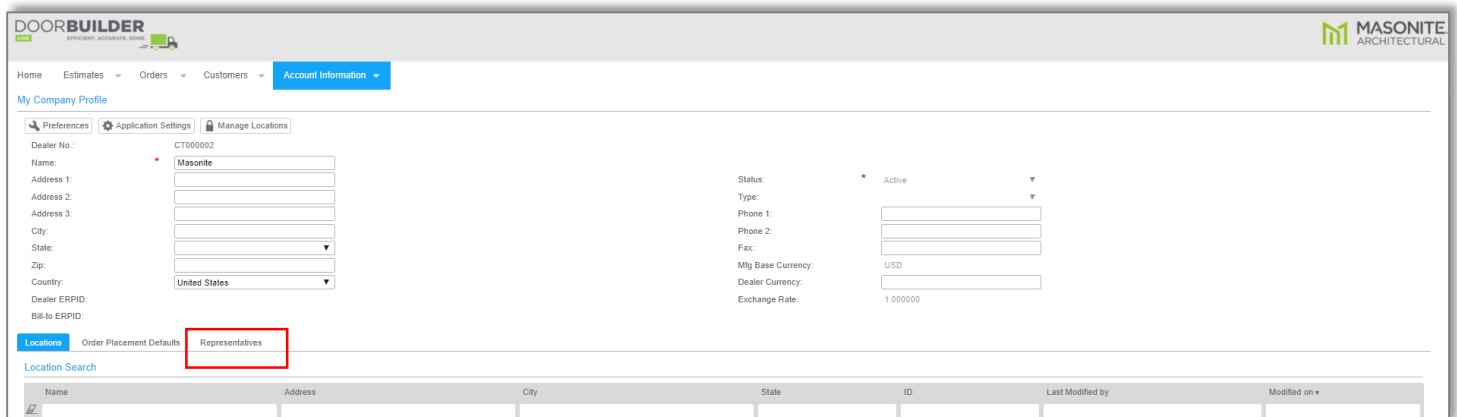
Each customer has their own instance of Door Builder Live and internally must assign an Administrator who will maintain the user accounts. Customers no longer need to send in a request to add users. They can maintain their own users, they can modify them, add new, modify privileges, etc.

1. Under Account information, Click **My Company Profile**

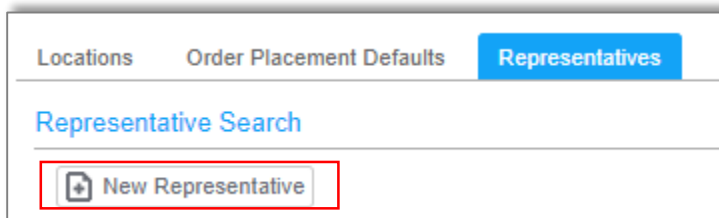


The screenshot shows the 'Account Information' page in the Door Builder Live interface. The 'My Company Profile' link is highlighted with a red box. The page includes fields for user information (First Name, Last Name, User ID, Windows User ID, E-mail, Phone, Fax, Mobile, License Status) and application settings (Order Privilege, Default Landing Page, Manage Dealer, Language). A dropdown menu is open over the 'My Company Profile' link, showing options: My Profile, My Company Profile (highlighted), Admin, Help, and Log Off.

2. Then Click **Representatives and New Representative**



The screenshot shows the 'My Company Profile' page in the Door Builder Live interface. The 'Representatives' link is highlighted with a red box. The page includes fields for dealer information (Dealer No., Name, Address 1, Address 2, Address 3, City, State, Zip, Country, Dealer ERPID, Bill-to ERPID) and status information (Status, Type, Phone 1, Phone 2, Fax, Mtg Base Currency, Dealer Currency, Exchange Rate). A table is visible at the bottom with columns: Name, Address, City, State, ID, Last Modified by, Modified on.



The close-up screenshot shows the 'Representatives' section with a 'New Representative' button highlighted by a red box. The button has a plus icon and the text 'New Representative'.

3. When you create a new account you will fill in the required Fields (marked with a *).

Representative
✕

Representative Information

<p>First Name: * <input type="text" value="test"/></p> <p>Last Name: * <input type="text" value="customer"/></p> <p>User ID: <input type="text" value="testcustomer"/></p> <p>Password: * <input type="password" value="****"/></p> <p>Confirm: * <input type="password" value="****"/></p> <p>Windows User ID: <input type="text"/></p>	<p>E-mail: <input type="text" value="testcustomer@test.com"/></p> <p>Phone: <input type="text" value="555-555-5555"/></p> <p>Fax: <input type="text" value="444-444-4444"/></p> <p>Mobile: <input type="text" value="888-888-8888"/></p> <p>Status: <input type="text" value="Active"/></p>
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Application Settings

Order Privilege:

Default Landing Page:

Language:

Manage Dealer:

Configuration Profiles

Default:

Mobile:

Document:

4. There are 3 types of order privileges that you can assign to a user
 - **Can order Directly** – This user can place Estimates or Orders
 - **Convert Estimate to Order** – This user can make Estimates and convert them to orders, but not start Orders from Scratch.
 - **None** – This user can only make Estimates
5. Select **Manage Dealer** if you would like the user to also be able to create additional users
6. Click **Ok** to Save the User
7. Click **Manage locations**. If your company has multiple locations, they will be all listed there. You can assign each user to the location(s) that they should be able to estimate or order from. (even if you have one location, you must still assign it to the user)

DOORBUILDER
efficient. accurate. simple.

Home Estimates Orders Customers Account Information

My Company Profile

Dealer No.: CT001234

Name: *

Address 1:

Address 2:

Address 3:

City:

State:

Zip:

Country:

Dealer ERPID:

Bill to ERPID:

Status: *

Type:

Phone 1:

Phone 2:

Fax:

Mfg Base Currency:

Dealer Currency:

Exchange Rate:

Locations Order Placement Defaults **Representatives**

Remaining Licenses: 88

Representative Search

Name	E-mail	Phone	Mobile	ID	Last Modified by	Modified on
<input checked="" type="checkbox"/> Doe	jdoe@masonite.com	418-000-0000	418-000-0000	CN8000111	Handbury, Laura	8/24/2018

Page 1 of 1

8. Select the Representative you would like to assign locations to
9. You can **Allow Access** and **Default** to a specific location.

Manage Locations

Representative: **Admin, Admin**

Provide your search options in the fields below. Use an asterisk (*) for multiple character replacements and a question mark (?) for single character replacements.

Location Name: Location ID: Location ERPID: Location Address:

	Parent	<input checked="" type="checkbox"/> Allow access to all locations	Select All	Select None	Allow Access	Default
Training Door Builder Live -	Jefferson City				<input checked="" type="checkbox"/>	<input type="radio"/>
Training Door Builder Live -	Northumberland				<input checked="" type="checkbox"/>	<input type="radio"/>
Training Door Builder Live -	Marshfield				<input checked="" type="checkbox"/>	<input type="radio"/>
Training Door Builder Live -	St.Ephrem				<input checked="" type="checkbox"/>	<input type="radio"/>
Training Door Builder Live -	Algoma				<input checked="" type="checkbox"/>	<input type="radio"/>

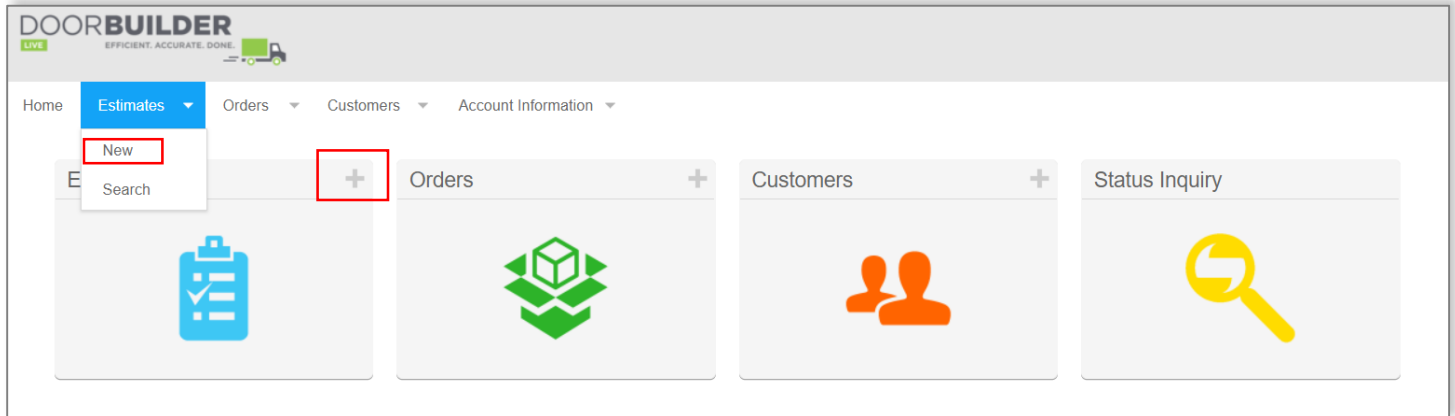
Page 1 of 3 Lines per page: 5

10. Click **Ok** to Save the Representative

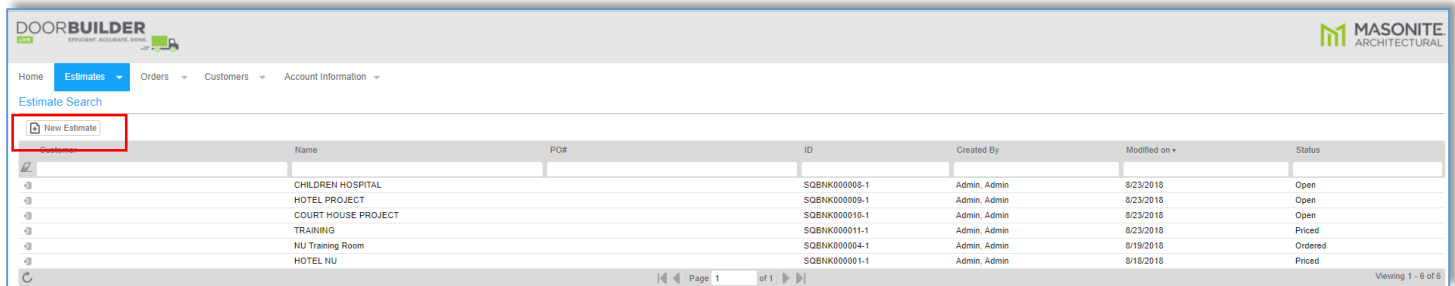
Start an Estimate

To start a new Estimate from the **Home** screen:

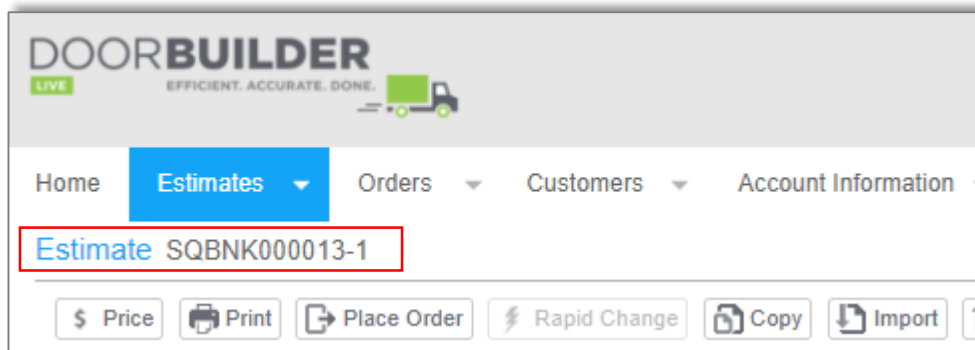
- Click the **[+]** sign on the Estimates tile to go directly to a new estimate data entry screen.
- Use the **Navigation Bar** and select **New** from the **Estimates drop-down menu**



To start a new Estimate from the **Estimate Search** screen, select the **[New Estimate]** button.



You will be presented with the **Estimate Entry** screen. Note that your Estimate number now appears below the navigation bar.

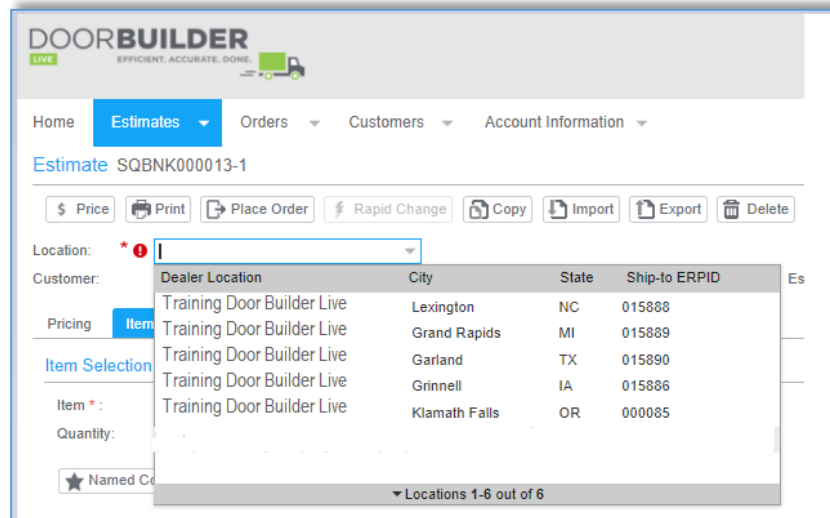


Capture Job Information

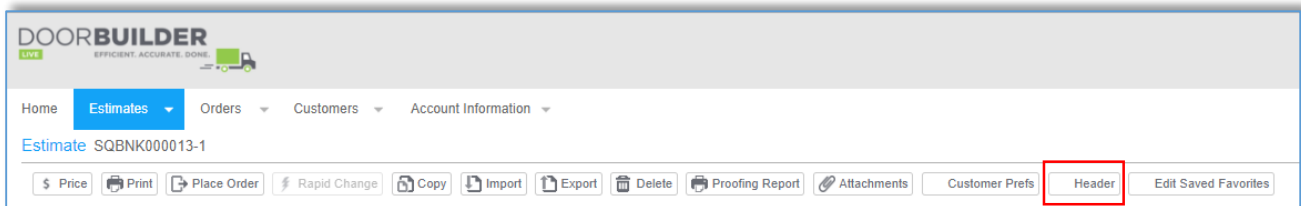
You will be presented with the Estimate Entry screen.

Note: All fields with a red asterisk (*) are required. We default many of the fields, however, you must review each field and change or supply missing information as needed.

1. **Select a Location** from the drop-down list if your site has multiple location. If not the system, will default to the main location.



2. After selecting the location, you will be presented with the Header pop-up window Or you can launch it by clicking **Header** in the Action Bar.



- **Preferred** manufacturing location has been set to Northumberland.
- **Enter a Job Name** which can be used for Estimate searching
- There are two types of Estimates to select from. Select **Generic Estimate** if you want the quickest way to a price, select **Detailed Estimate** if you want the system to do more validation around your options such as locations and lite/lock conflicts
- **Select Sector** from the drop down list
- **Enter the Date Estimate Required** or select date from the pop-up calendar
- **Total Number of Doors on Estimate** is an optional question if you want the system to verify that the quantity you enter here matches the total quantity of door that will result your estimate. If the quantity does not match, the system will warn you.
- **Enter the Approximate Project Delivery Date** or select date from the pop-up calendar

Continue Cancel | | Price: Price is not available

Page 1 More

Select Manufacturing Site: *

Job Name: *

Estimate Type: * Detailed Estimate Generic Estimate

Sector: *

Construction: New Construction Tenant Improvement

Date Estimate Required:

Total Number of Doors on Estimate:

Approximate Project Delivery Date *

3. **Select a Job Contact** from the contact list or use Enter Name to add your own for this job.

Customer Contact Name: *

Customer Contact First Name: *

Customer Contact Last Name: *

Customer Contact Phone (xxx-xxx-xxxx):

Customer Contact Fax (xxx-xxx-xxxx):

Customer Contact Email:

4. Scroll down to verify the **Shipping Information**. Select **One time ship to** if you have a jobsite delivery or the address is not in the dropdown.
5. You must select a **Transport mode** from the available dropdown list.

Shipping Information

Ship To: *

Street (line 1):

Country: *

State: *

Zip Code: *

City: *

Transport Mode: *

Crating Option: *

Delivery Terms: *

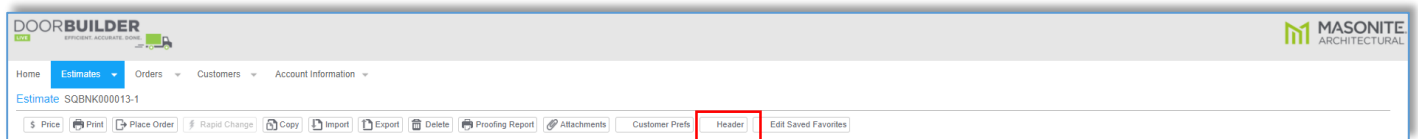
Packing Instructions 1:

Export Package:

Wood Pallet:

6. When completed select the **Finish** button in the top left corner of the window.

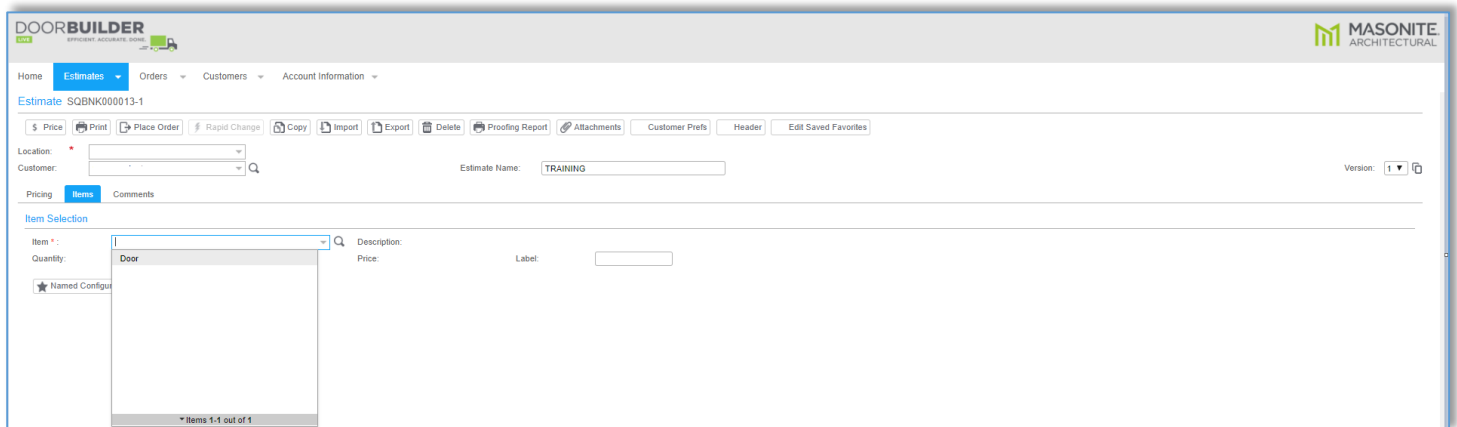
TIP: You can make changes to the job information by selecting the [Header] button.



Configure Line Items – Single Door

After entering the Header, the next task in creating an Estimate is to **enter a Line Item**. The Line Items you enter will go into your Shopping Cart, which displays the products in your Order. The procedure below explains how to use The Configurator to enter a Line Item for a pre-machined door.

1. **Select 'Door'** to configure from the item drop-down list



- Once an item is selected, the **Quantity field** is displayed. This Quantity will apply for the line that you will create. You can change the Quantity as needed.
- Select the [Configure]** button to open the Configuration screen.

The screenshot shows the 'Item Selection' interface. At the top, there's a search bar for 'Item' with 'Door' entered and a 'Quantity' field with '1 EA'. Below this are two tabs: 'Configuration Options' (active) and 'Global Options'. The 'Configuration Options' tab contains a grid of dropdown menus for various door specifications: Series (Cendura | Mohawk), Product Type (Standard Wood Veneer), Opening Type (1 Door Single Opening), Door Width Feet, Door Height Feet, Door Height Inches, Rating (Non-Rated), Door Thickness (1-3/4 Inch), Face Type (Wood Veneer), Core (Particleboard), Specification Standard, Environmental Attribute, Finish Information (Clear), Door Packaging, Pilot Holes? (Yes), Hardware Favorite, Stile Edges, Elevation Favorite, Elevation Type, Hinge/Pivot Type, Lock/Exit Type, TopRail(Wider/Blocking), and BotRail(Wider/Blocking). At the bottom left, the 'Configure' button is highlighted with a red box. Other buttons include 'Add', 'Reset selected options', 'Named Configurations', and 'Add Write-In Item'.

- Click **configure** to open the configuration screen to the Base Options tab.
 - Enter your line Item or Document reference**
 - Enter your Door Quantity** if you did not specify before Hit Configure
 - Select the Series** from the drop-down list
 - Select the Product Type** from the drop-down list
 - Select the Door Opening Type** from the drop-down list – leave this as 1 Door Single Opening
 - Enter the Door Measurements** – you can choose a standard opening size or enter your own.

The screenshot shows the 'Base Options' configuration screen. At the top, there are 'Continue' and 'Cancel' buttons, a save icon, a print icon, and a 'Price: Price is not available' message. Below this are tabs for 'Base Options' (active), 'Door', and 'Face'. The 'General' section contains fields for: Line Item* (Sheet # 1), Opening Number Quantity (25), Measurement Unit* (Imperial), Series* (Cendura | Mohawk), Product Types* (Standard Wood Veneer), Door Opening Type* (1 Door Single Opening), and Opening Options. The 'Door Measurements' section contains: Standard Size? (radio buttons for 3'-0" x 6'-8", 3'-0" x 7'-0", 3'-0" x 8'-0", 4'-0" x 7'-0", 4'-0" x 8'-0"), Door Width Feet (8), Door Width Inches* (0), Door Height Feet (7), Door Height Inches* (0), and Opening Size Information (3'-0" X 7'-0").

Tip: Save often to avoid losing input data. The save icon is on the top left of the Configurator, next to the [Cancel] button.

5. Click the **Door** tab or the **Continue** button to display the next entry fields.

- **Select the Rating** from the drop-down list. If the door has a fire rating, the minutes specification of the door must be provided
- **Select the Core Material** (ie. Particleboard, SCLC, etc....) from the drop-down list
- **Check the Floating/Non-bonded core box** if you have a non-bonded core.
- The **Specification Standards** will be defaulted for you – use the drop-down if you need a different option
- The **Environmental Attributes** will be defaulted for you – use the dropdown if you need a different option
- **The Thickness** of the door will be defaulted for you – use the dropdown if you need a different option

The screenshot shows the 'Door' tab selected in the software interface. The 'Construction Information' section is visible, containing the following fields:

- Rating: * (Non-Rated)
- STC Rating: (empty dropdown)
- Core Material: * (Particleboard)
- Floating / Non-bonded Core: (checkbox, unchecked)
- Smoke Label: (checkbox, unchecked)
- Specification Standards: * (WDMA)
- Environmental Attributes: * (None)
- Thickness: * (1-3/4 Inch)

6. Click the **Face** tab or the **Continue** button to display the next entry fields.

- **If available, determine Yes or No for the Split Species** (not all door constructions offer split species). If you select **Yes**, the inside and outside of the door will be made with different materials
- **Fill out the Face Information data.** If Split Species is **Yes**, you will need to fill out the data for the inside and the outside of the door
- **If available, determine Yes or No for Split Finish** (not all door constructions offer split finishes). If you select **Yes**, the inside and outside of the door will be finished with different coats
- **Fill out the Finish Information data.** If Split Species is **Yes**, you will need to fill out the data for the inside and the outside of the door.

The screenshot shows the 'Face' tab selected in the software interface. The 'Face Information' and 'Finish Information' sections are visible, containing the following fields:

Face Information

- Face Type: * (Wood Veneer)
- Species: * (Maple White)
- Cut: * (Plain Sliced)
- Grade: * (A)
- Matching: * (Book and Running Match)
- Split Finish: (checkbox, unchecked)

Finish Information

- Finish: (Clear)

Click the **Hardware** tab to display the next information entry fields

- **Select the Hinge or Pivot Hardware Type** (ie. Continuous Hinge, Hinge, or Pivot)
 - **Select the Sub Category** from drop down list
 - **Proceed to fill out** the remaining required fields
 - If your Quantity does not match the total quantity, you will be asked to enter additional Hinge Types
- **Select the Lock/Exit Device Type** (ie. Continuous Hinge, Hinge, or pivot)
 - **Select the Sub Category** from drop down list
 - **Proceed to fill out** the remaining required fields
 - If you have multiple locks use the additional Lock/Exit device question
- **Add any additional hardware** (ie. Holder, Closer, Viewer, any Surface applied Hardware) under ‘**Other Hardware Information**’
 - If you have more than one additional hardware type, use the additional Hardware question

Base Options Door Face **Hardware** Elevations Edge / Accessories Misc Options More.

Trace Hardware Yes No

Hardware Favorite:

Measurement Unit: * Imperial Metric

Hinge / Pivot Information

Hardware Type:

Total Number of Hinges on Frame: *

Sub Category: *

Hinge Quantity: *

Drill Pilot Holes?

Lock / Exit Device Information

Lock / Exit Device Type:

Sub Category: *

Additional Lock / Exit Device? Yes No

Other Hardware Information

Hardware Type:

Save Favorite:

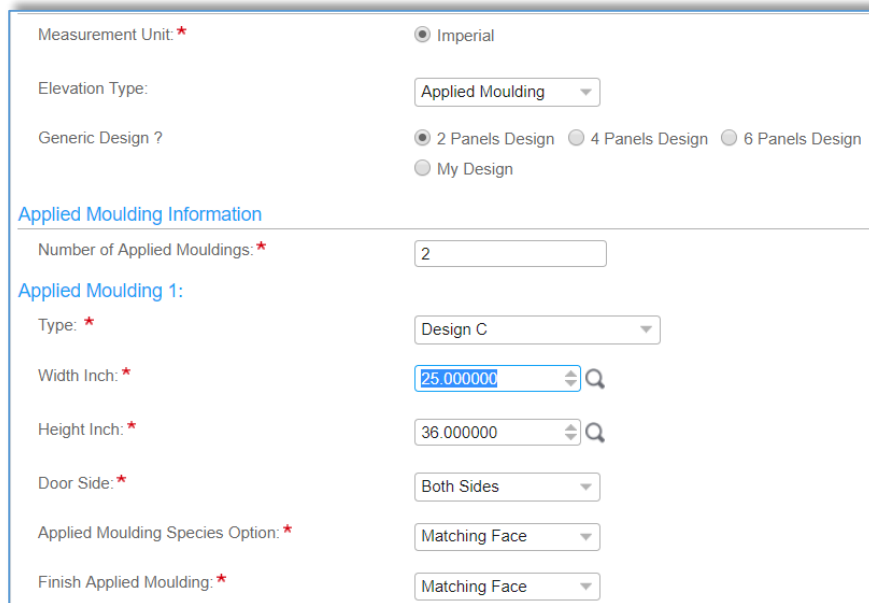
Tip: if you find that you have added a piece of hardware that you no longer want to be on your line, you can either change the hardware type to be blank or change it to delete.

Additional Lock / Exit Device? Yes No

Lock / Exit Device Type:

7. Click the **Elevations** tab to display the next information entry fields

- **Select an Elevation Type**, (ie. Applied Moulding, Lite Cutout, Louver, Applied Grilles, Etc.) to add to your door configuration.
- **Fill out the required information** for the Elevation Type you select.



Measurement Unit: * Imperial

Elevation Type: Applied Moulding

Generic Design ? 2 Panels Design 4 Panels Design 6 Panels Design My Design

Applied Moulding Information

Number of Applied Mouldings: * 2

Applied Moulding 1:

Type: * Design C

Width Inch: * 25.000000

Height Inch: * 36.000000

Door Side: * Both Sides

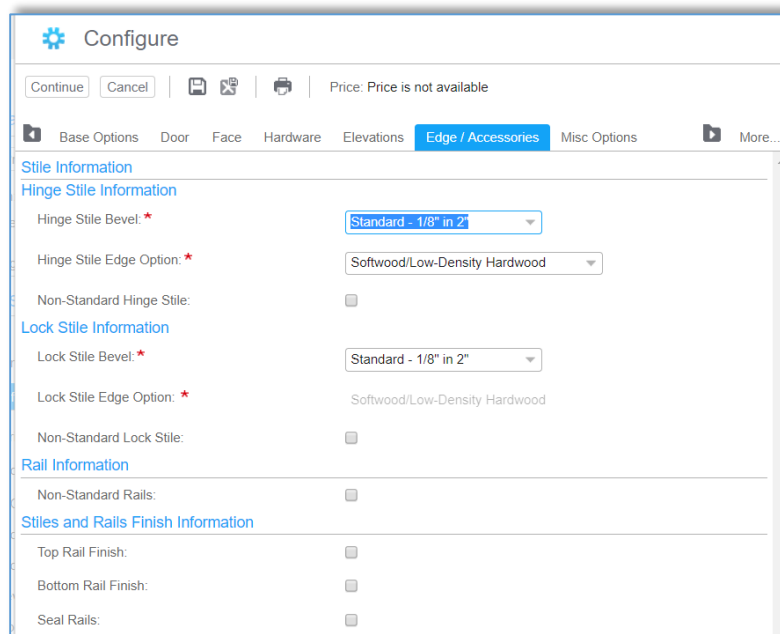
Applied Moulding Species Option: * Matching Face

Finish Applied Moulding: * Matching Face

8. Click the **Edge / Accessories** tab to display the next information entry fields

- a. Use the **non standard Stiles or Rails question** to add Blocking, larger Stiles or Rails, etc. to your door configuration

**Please note, the default construction based on your selections or hardware will be defaulted for you. You do not need to select a larger bottom rail or a radius hinge if you have added hardware that requires it.



Configure

Continue Cancel Price: Price is not available

Base Options Door Face Hardware Elevations **Edge / Accessories** Misc Options More...

Stile Information

Hinge Stile Information

Hinge Stile Bevel: * Standard - 1/8" in 2"

Hinge Stile Edge Option: * Softwood/Low-Density Hardwood

Non-Standard Hinge Stile:

Lock Stile Information

Lock Stile Bevel: * Standard - 1/8" in 2"

Lock Stile Edge Option: * Softwood/Low-Density Hardwood

Non-Standard Lock Stile:

Rail Information

Non-Standard Rails:

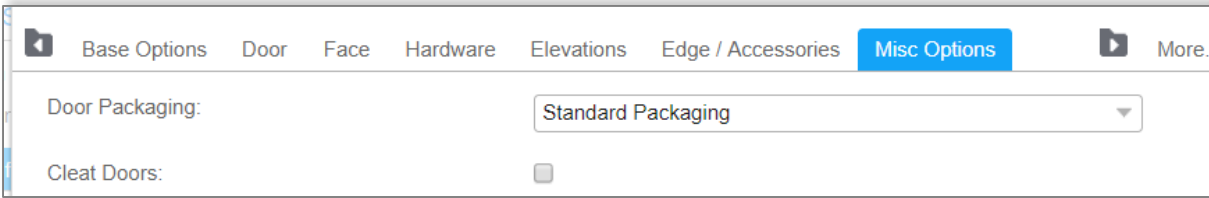
Stiles and Rails Finish Information

Top Rail Finish:

Bottom Rail Finish:

Seal Rails:

9. Click the **Miscellaneous Options** tab to display the next entry fields

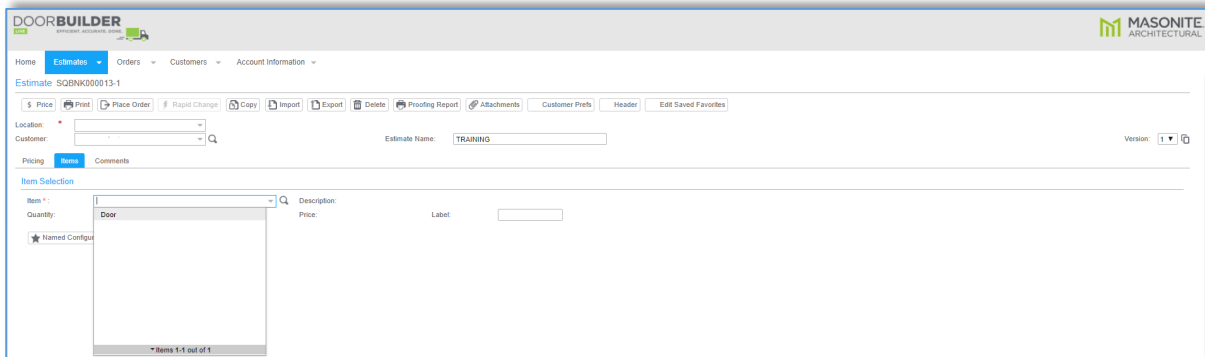


*Note Standard packaging will supply you with a default packaging from the plant based on your configuration. This could be dependent on your finishing or elevation options.

10. Check the **Check Configuration Box**, and click **Finish**

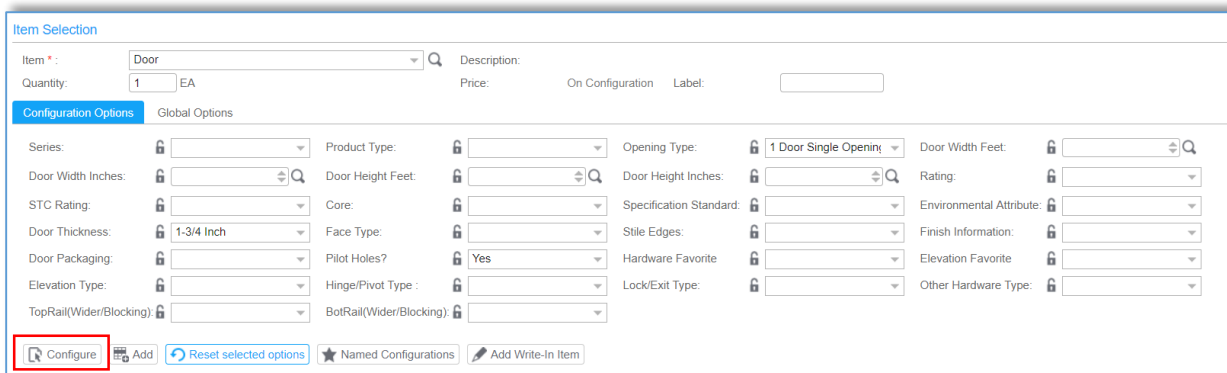
Configure Line Items – Pair/Set

1. If not already selected, Select **'Door'** to configure from the item drop-down list



2. Once an item is selected, the **Quantity field** is displayed. This Quantity will apply for the line that you will create. You can change the Quantity as needed. For a Pair a Quantity of '1' means one opening of two doors (Active/Inactive)

3. Select the **[Configure]** button to open the Configuration screen

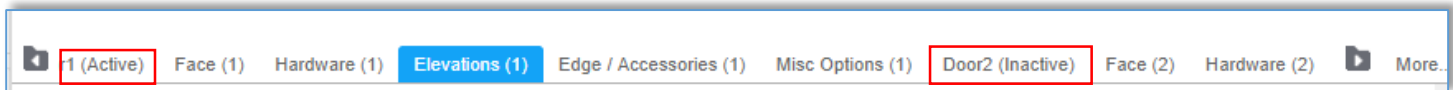


4. Click **configure** to open the configuration screen to the Base Options tab.

- **Enter your line Item or Document reference**
- **Enter your Door Quantity** if you did not specify before Hit Configure
- **Select the Series** from the drop-down list
- **Select the Product Type** from the drop-down list
- **Select the Door Opening Type** from the drop-down list – Make Sure this is selected as 2 door Pair Opening
- **Enter the Door Measurements** – Use a generic option or fill in the values yourself. The system will default to an equal pair but if you have an unequal pair, use the Unequal Size checkbox

The screenshot shows the configuration interface for a door. The 'Series' is set to 'Cendura | Mohawk' and 'Product Types' is 'Standard Wood Veneer'. The 'Door Opening Type' is '2 Door Pair Opening' and 'Set Configuration' is 'Pair of Doors in Same Opening'. Under 'Door 1 Measurements', the 'Standard Size?' is '3'-0" x 7'-0"'. The 'Door Width Feet' is 3, 'Door Width Inches' is 0, 'Door Height Feet' is 7, and 'Door Height Inches' is 0. The 'Door 2 Measurements' section shows 'Unequal Size' is unchecked and 'Opening Size Information' is '6'-0" X 7'-0"'. There are search icons next to several input fields.

5. You will notice that your tabs at the top now have a (1), (2) etc. This is to dictate which door in the pair/set you are currently on.



- Follow the steps from the Single Door path to fill in all of the (1) tabs.
- Add an Astragal/Edge accessory if needed on the Edge and Accessories (1) tab

The screenshot shows the 'Edge Accessories' configuration screen. The 'Edge Accessory Material' is 'Metal (Standard)', the 'Edge Accessory Type' is 'Astragal & Edge Set', and the 'Edge Accessory Color' is 'Beige'. There are search icons next to the material and type fields.

6. Most of your information will be defaulted from Door 1 to Door 2.

7. Fill in the **Hardware (2)** tab

- Use the available copy functions, to copy any set of Hardware from your Previous Door.

The screenshot shows the 'Hardware (2)' configuration tab. At the top, there are tabs for 'Elevations (1)', 'Edge / Accessories (1)', 'Misc Options (1)', 'Door2 (Inactive)', 'Face (2)', and 'Hardware (2)'. The 'Hardware (2)' tab is active. Below the tabs, there are several settings:

- 'Trace Hardware': Radio buttons for 'Yes' and 'No', with 'No' selected.
- 'Hardware Favorite': A dropdown menu.
- 'Measurement Unit: *': Radio buttons for 'Imperial' and 'Metric', with 'Imperial' selected.
- 'Hinge / Pivot Information': A section header.
- 'Copy Previous Hinge/Pivot:': A checked checkbox.
- 'Hardware Type: *': A dropdown menu with 'Hinge' selected.
- 'Total Number of Hinges on Frame: *': A numeric input field with '3' and a search icon.
- 'Sub Category: *': A dropdown menu with 'Standard' selected.
- 'Hinge Quantity: *': A numeric input field with '3' and a search icon.
- 'Drill Pilot Holes?': A checked checkbox.

8. Fill in the **Elevations (2)** tab

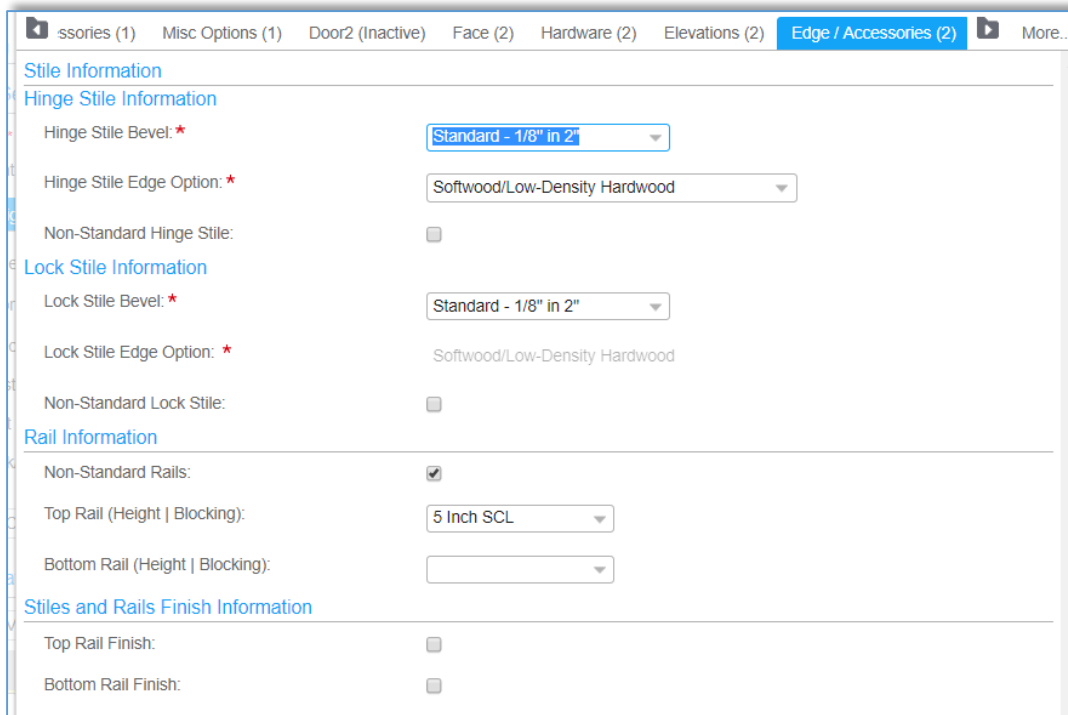
- You can also use the copy feature to copy any elevations from Door 1.

The screenshot shows the 'Elevations (2)' configuration tab. At the top, there are tabs for 'Elevations (1)', 'Edge / Accessories (1)', 'Misc Options (1)', 'Door2 (Inactive)', 'Face (2)', 'Hardware (2)', and 'Elevations (2)'. The 'Elevations (2)' tab is active. Below the tabs, there are several settings:

- 'Copy Elevations from Previous Door:': A checked checkbox.
- 'Measurement Unit: *': Radio buttons for 'Imperial' and 'Metric', with 'Imperial' selected.
- 'Elevation Type:': A dropdown menu with 'Lite Cutout' selected.
- 'No Hose Stream:': Radio buttons for 'Yes' and 'No', with 'Yes' selected.
- 'Cutout Information': A section header.
- 'Number of Cutouts: *': A numeric input field with '1' and a search icon.
- 'Cutout 1:': A section header.
- 'Cutout Type: *': A dropdown menu with 'Metal Vision Frame (Standard)' selected.
- 'Measurement Type Reference: *': A dropdown menu with 'Visible Glass Size' selected.
- 'MVF Moulding: *': A dropdown menu with '110 - All Metal Stamping' selected.
- 'Cutout Only (Bead/MVF by Others):': An unchecked checkbox.
- 'Width Inch: *': A numeric input field with '18.000000' and a search icon.
- 'Height Inch: *': A numeric input field with '36.000000' and a search icon.
- 'Tamper / Vandal Screws:': An unchecked checkbox.
- 'MVF Finish/Color: *': A dropdown menu with 'Beige' selected.
- 'Glass Thickness: *': A dropdown menu with '1/4 Inch' selected.
- 'Glass: *': A dropdown menu with 'Wirelite NT - Georgian Pattern' selected.
- 'Factory Glaze:': An unchecked checkbox.

8. Click the **Edge / Accessories** tab to display the next information entry fields
 - a. Use the **non standard Stiles or Rails** question to add Blocking, larger Stiles or Rails, etc. to your door configuration

**Please note, the default construction based on your selections or hardware will be defaulted for you. You do not need to select a larger bottom rail or a radius hinge if you have added hardware that requires it.

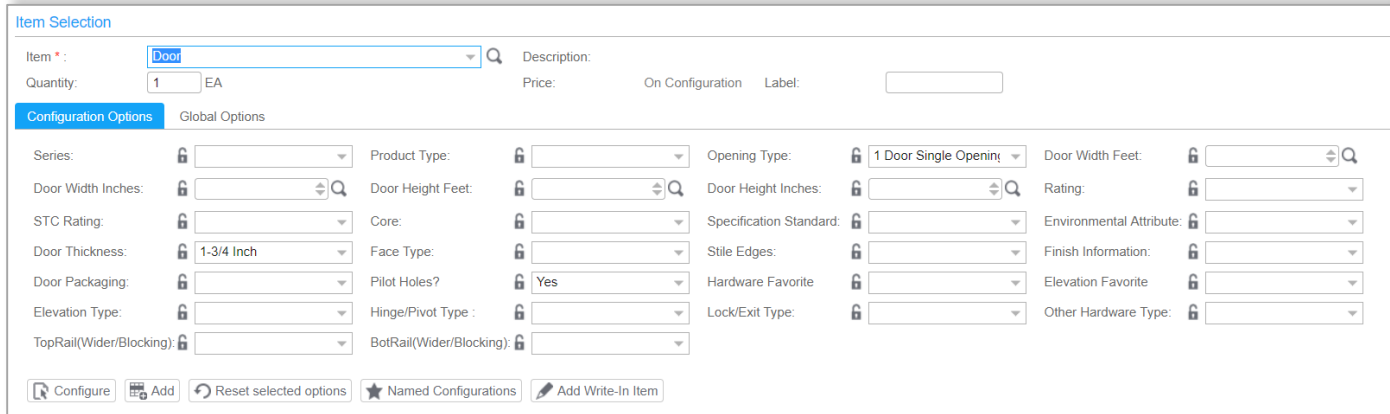


9. Click the **Miscellaneous Options** tab to display the next entry fields
10. Check the **Check Configuration Box**, and click **Finish**

HOW TO GUIDE

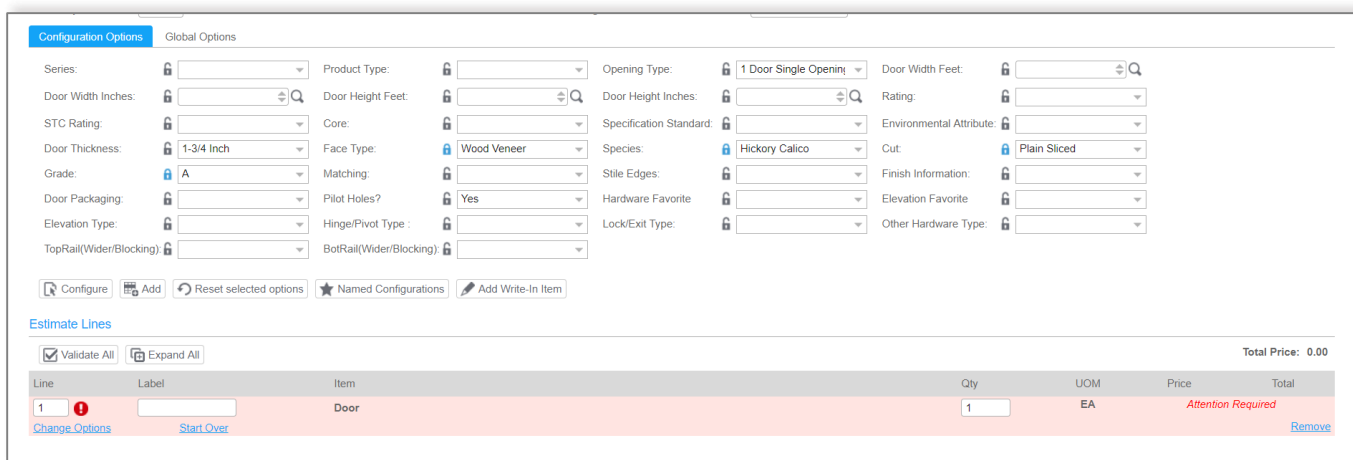
Using Rapids

Rapids speed up the configuration process by allowing you to define a set of values for similar door Line Items. Rapids are found below the Item Selections section of the Estimate Entry Screen Or the Order Entry Screen.



Using Rapids during Estimate Or Order Entry

1. Use the drop-down lists and entry fields of the Rapids to set values you would like to persist for your estimate or order.
 - As you enter settings from the drop-down lists, notice that the Lock icons change from unlocked to locked. That means the setting will populate to every Line Item you add.
 - You can click the lock icon to unlock it. When a Lock icon is unlocked, the field returns to the default value after you add the Line Item to the Shopping Cart. That means the field is either blank, or populated with a default value.
2. Once the data fields are populated, you can click the **Configure** button or click on the **Add** button to start your next line.
 - If you click **Configure**, it will launch the configurator for your next line. Any rapids you chose will be preselected in the line
 - If you click **Add**, it will generate a line in your shopping cart. The line will be red if it needs additional information and you must click Change Options to launch the configurator



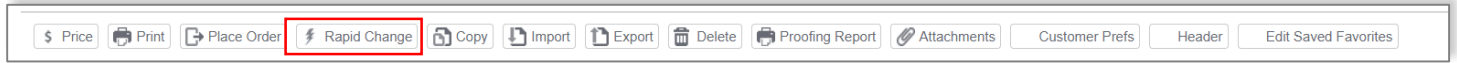
Line	Label	Item	Qty	UOM	Price	Total
1		Door	1	EA	Attention Required	

3. If you use Rapids and change options while in the Configurator, the option you select in the Configurator will override the rapid choice for that given line.

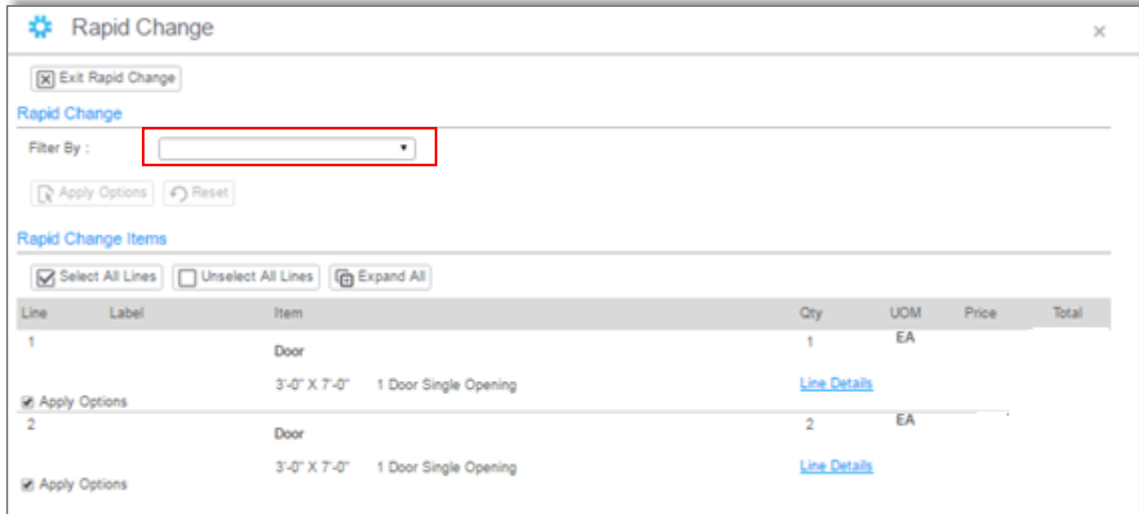
Using Rapid Change to Update Lines

You need at least one Line Item in the Shopping Cart to access this function. However, it is most useful if you need to update multiple Line Items at once, for example, all the doors in the Shopping Cart.

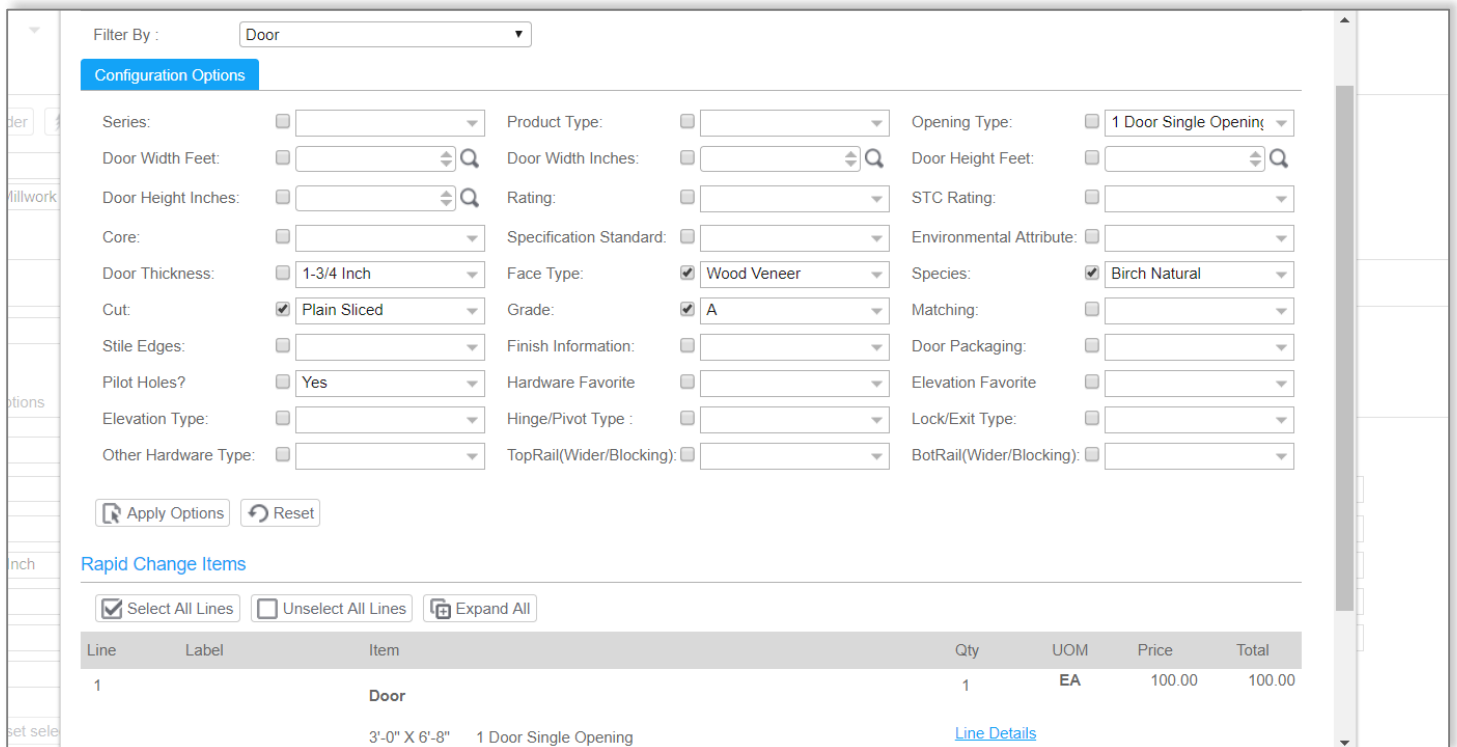
1. Click the **Rapid Change** button on the Action Bar. This will open the Configurator window for the Rapid Change Settings



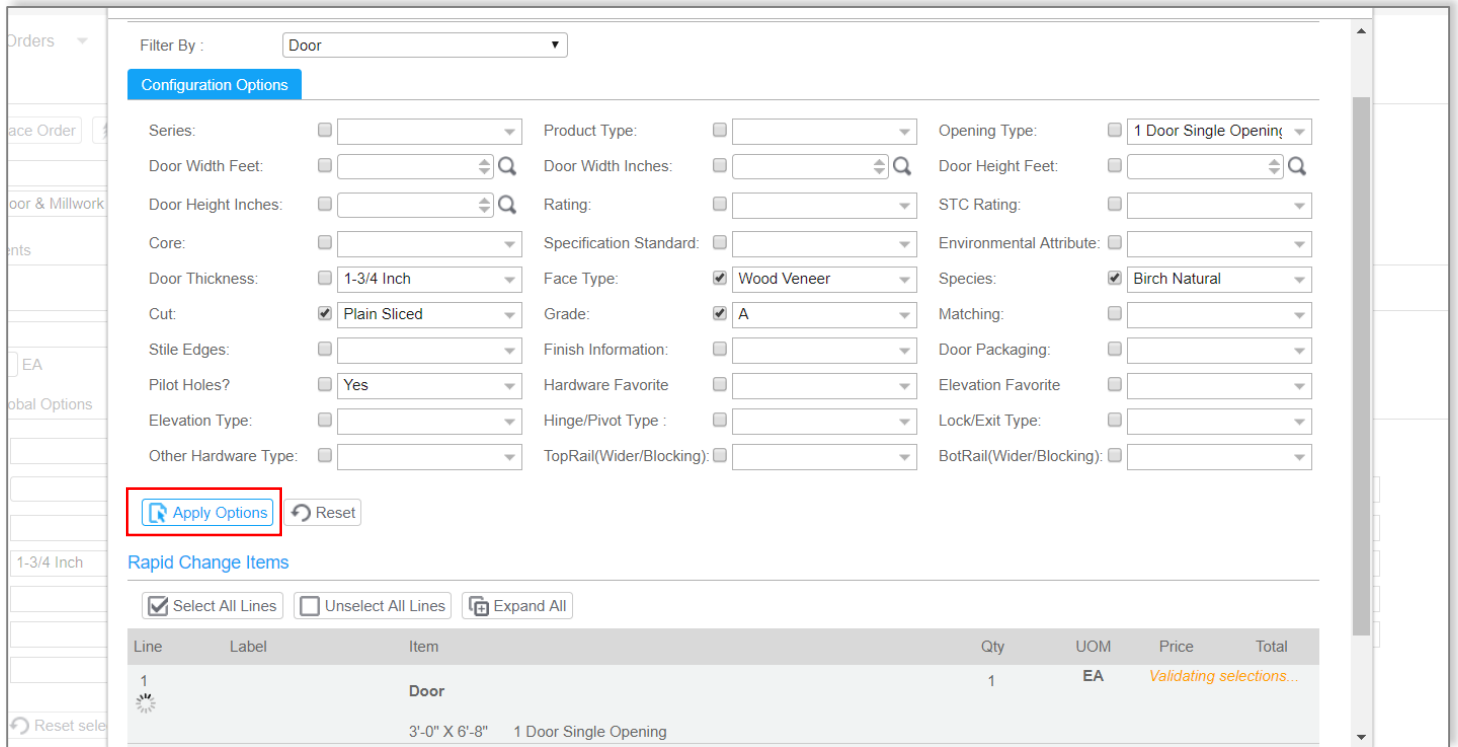
2. Select the **Door** option from the Filter By drop-down list



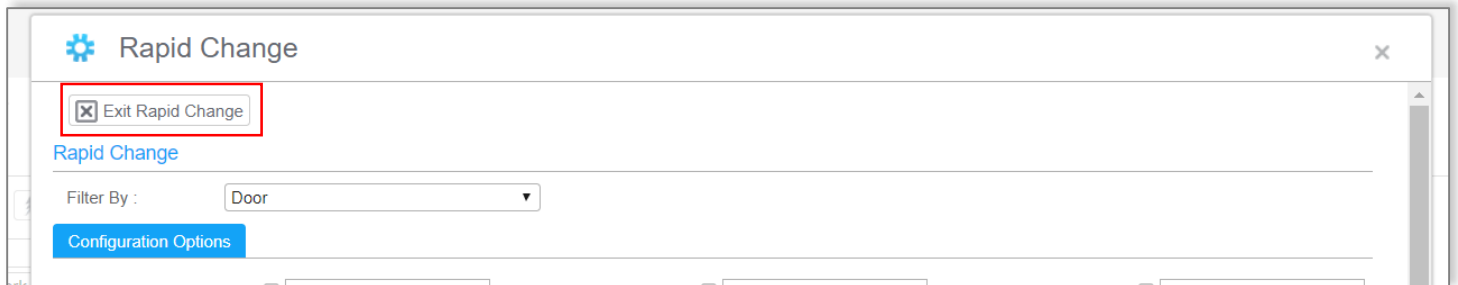
3. When an option is selected, the Configurator displays the Rapids Configuration Options for the selected filter.
4. Click the **Select All Lines** button to apply the Rapid configuration values you select to the all Line Items.
 - You can also apply the configuration options to individual Lines Items by checking or unchecking **Apply Options** for each Line Item.



5. Update the Rapid Configuration Options as required.
 - When you select a Configuration Option, the Configurator populates the check box next to the option.
6. Click the **Apply Options** button to process the Rapid Change.
 - While the Configurator processes the changes, it displays an indicator on each selected row and a message that it is validating the Line Items. The Lines will come back red if the new option violates any configurator rules.



7. When processing is finished, click the **Exit Rapid Change** button (at the top of the Configurator window) to close the window and return to the Item Selection screen.



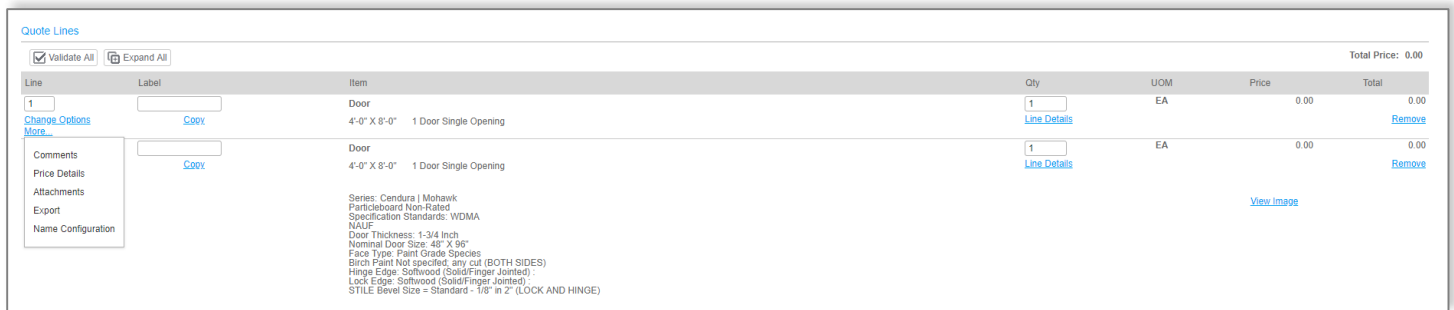
8. The lines in your shopping cart will be updated with the new information

Why use Named Configurations

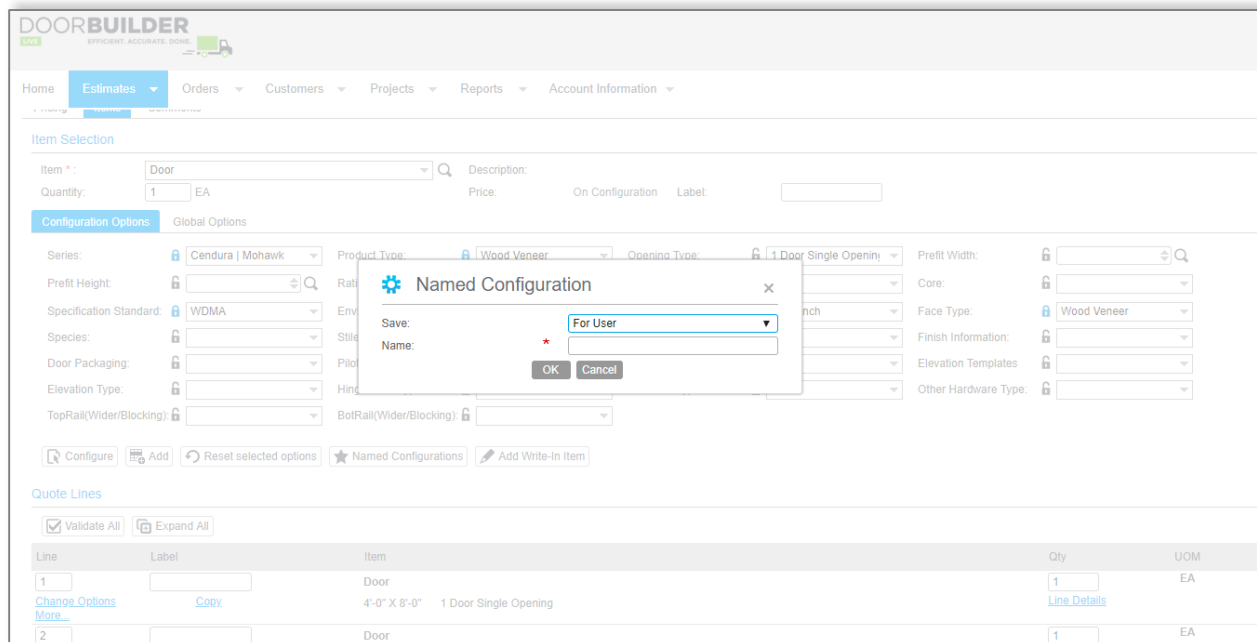
A Named Configuration is a predefined definition of a commonly ordered customer part. This module explains how to save a line item as a Named Configuration and how to import a Named Configuration into the Shopping Cart to expedite the data entry process.

Creating and Using Named Configurations

1. To create a Named Configuration, locate the line item you wish to save as a Named Configuration. Click the **More** link (under the Change Options link) and **select Name Configuration** from the drop-down menu.



2. You may choose to save a Named Configuration **For User**, **For Location** or **For Company**
 - If you choose **For User**, only you will be able to see and use it
 - If you choose **For Location**, only your location will be able to see and use it. (If you have a login that has locations)
 - If you choose **For Company**, everyone in your company will be able to see and use it.
3. Type a **Name** for your Named Configuration in the field.
 - Click the **OK** button to close the Named Configuration dialog and return to the Item Selection Screen.



- To use a Named Configuration, click the **Named Configurations** button on the Item Selection screen. It is in the same row as the **Configure** and **Add** buttons. This will open the Named Configurations dialog window.

The screenshot shows the Item Selection screen with the following details:

- Item #: Door
- Quantity: 1 EA
- Description: On Configuration
- Price: Label: [Empty]

The Configuration Options section includes:

- Series: [Dropdown]
- Door Width Inches: [Dropdown]
- Door Height Feet: [Dropdown]
- Door Height Inches: [Dropdown]
- Opening Type: 1 Door Single Opening
- Door Width Feet: [Dropdown]
- Profit Width: [Dropdown]
- Rating: [Dropdown]
- STC Rating: [Dropdown]
- Core: [Dropdown]
- Specification Standard: [Dropdown]
- Environmental Attribute: [Dropdown]
- Door Thickness: 1-3/4 Inch
- Face Type: [Dropdown]
- Stile Edges: [Dropdown]
- Frame Mfg: [Dropdown]
- Finish Information: [Dropdown]
- Door Packaging: [Dropdown]
- Pilot Holes?: Yes
- Hardware Favorite: [Dropdown]
- Elevation Favorite: [Dropdown]
- Elevation Type: [Dropdown]
- Hinge/Pivot Type: [Dropdown]
- Lock/Exit Type: [Dropdown]
- Other Hardware Type: [Dropdown]
- TopRail(Wider/Blocking): [Dropdown]
- BotRail(Wider/Blocking): [Dropdown]

At the bottom, the **Named Configurations** button is highlighted with a red box.

- Type into the **Name** field, and the Configurator searches for matching values.

The Named Configurations dialog window shows the following details:

- For User: [Checked]
- For Company: [Checked]
- For Location: [Checked]

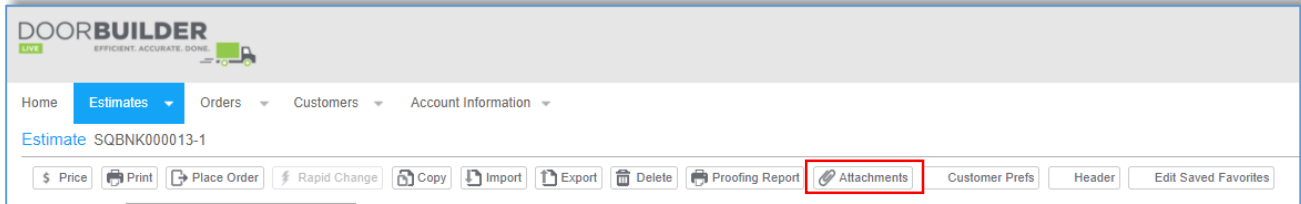
Qty	Label	Name	Part Number
[Input]	[Input]	training	[Input]
	Training Module		Door Remove

Buttons: Add, Cancel

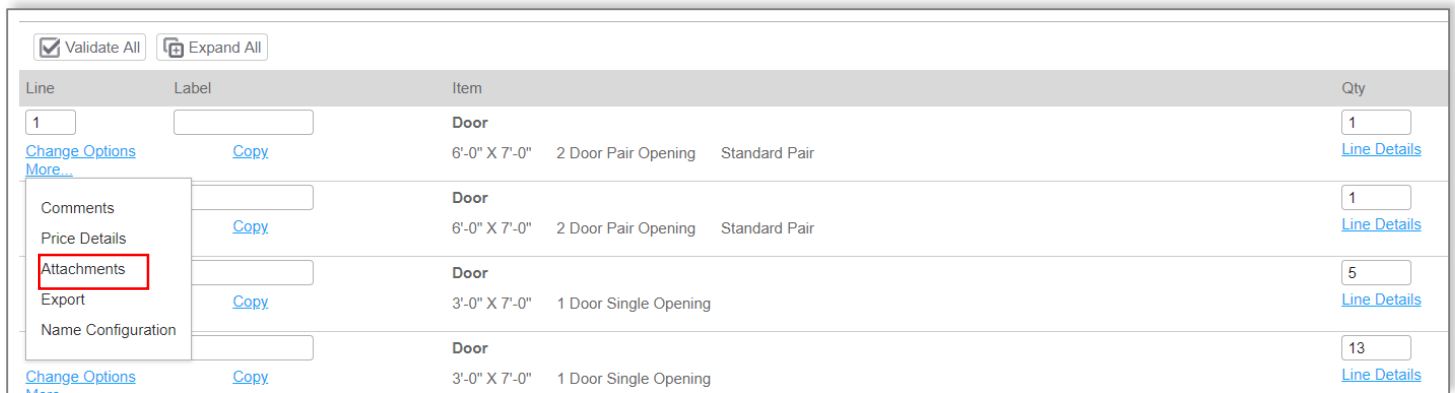
- Type a Quantity. Click the **Add** button. The Configurator adds a Line Item with the Named Configuration to the Shopping Cart.
- You can always change values on a given line for the named configuration. This will change the values for the given line, but will not change what is saved in the named configuration.

Add Attachments

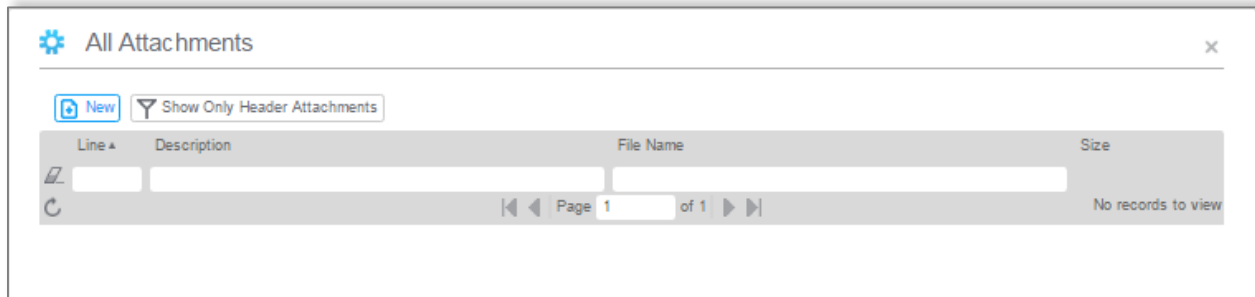
1. Click the **Attachments** button on the Action Bar to add Attachments at the Order or Estimate Level



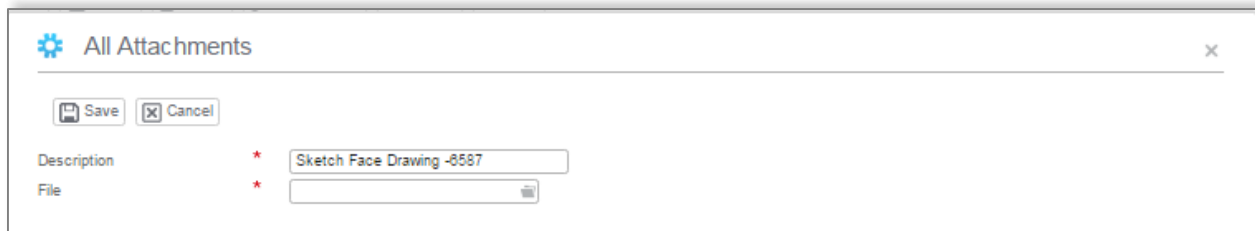
2. You can add Attachments to the line item by using the **More** Option below the line and **Attachments**



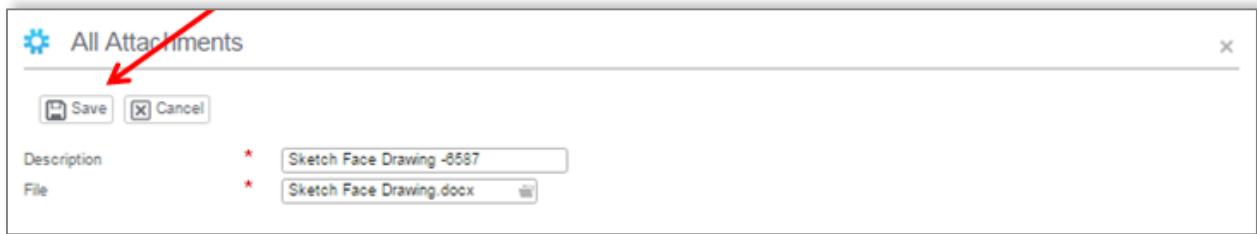
3. Click the **New** button on the All Attachments screen



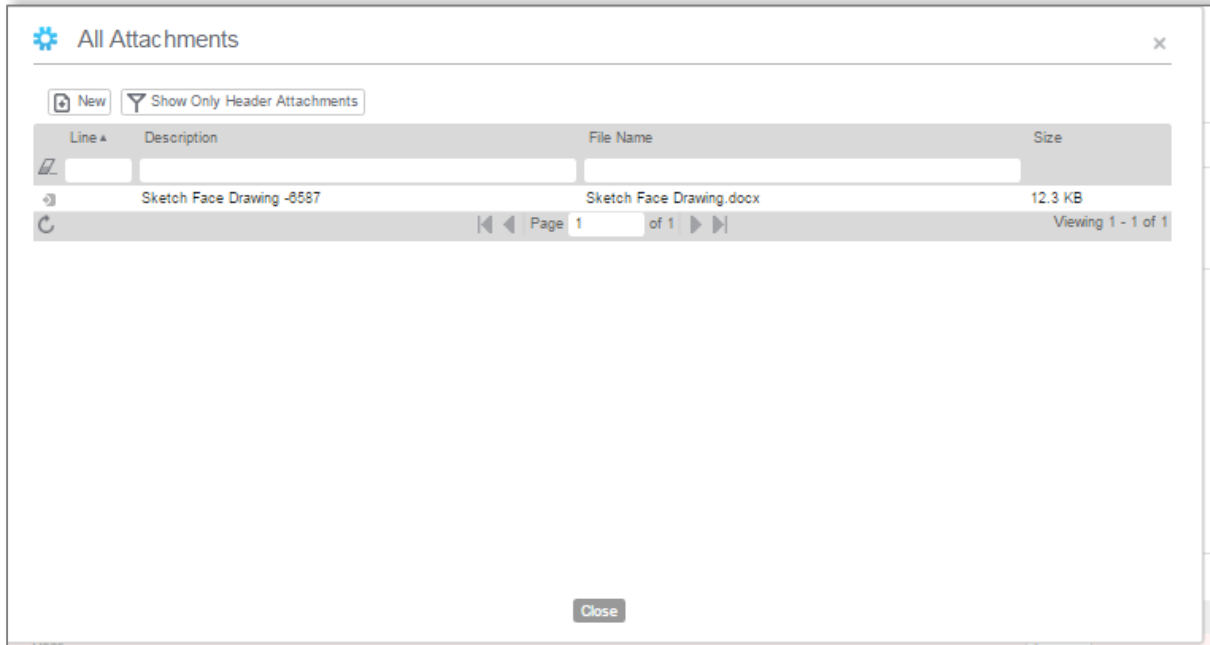
4. Type a description and click the **File** field to open the file dialog box. Select the file in your computer system to upload. Several different types of files will be accepted by the system (pdf, txt files, work documents, jpeg).



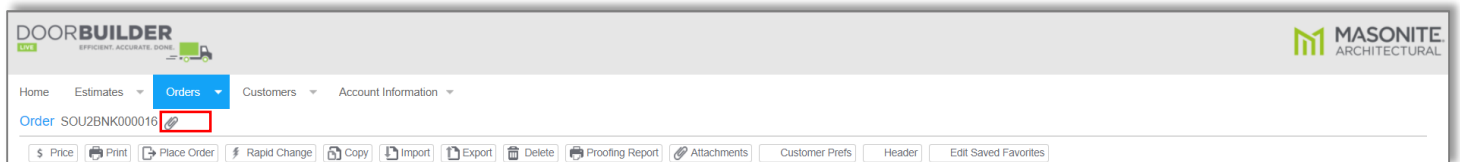
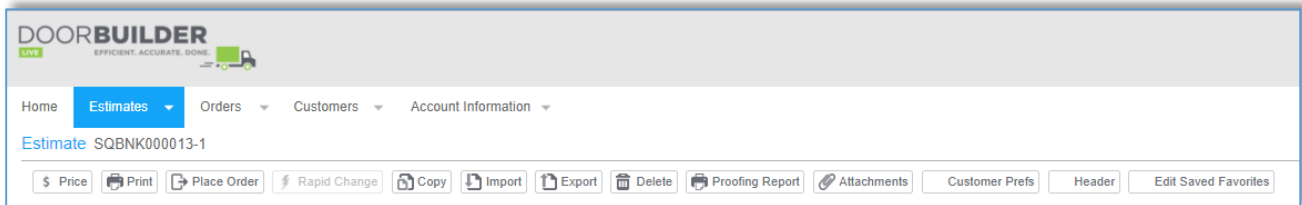
5. Click the **Save** button



6. The All Attachments screen now displays your description and file name in the list.



7. A Paper Clip icon next to the Estimate or Order Number is displayed on the Item Selection screen to indicate that files are attached. You can **click the Paper Clip** icon to go to the All Attachments screen and view or manage your files.

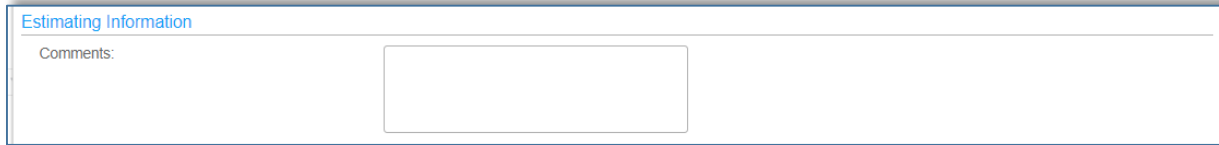


Add Comments

There are two ways to enter comments into an Estimate or Order

1. Comments can be added in the Header. Click on the **Header** button, and scroll to the comment section in the Header.
 - The Configurator displays the Estimating or Ordering Information section and inserts the cursor in the Comments field. Comments are printed on customer facing documents. All comments will be visible on all documents even from the ERP (Such as confirmations and invoices).

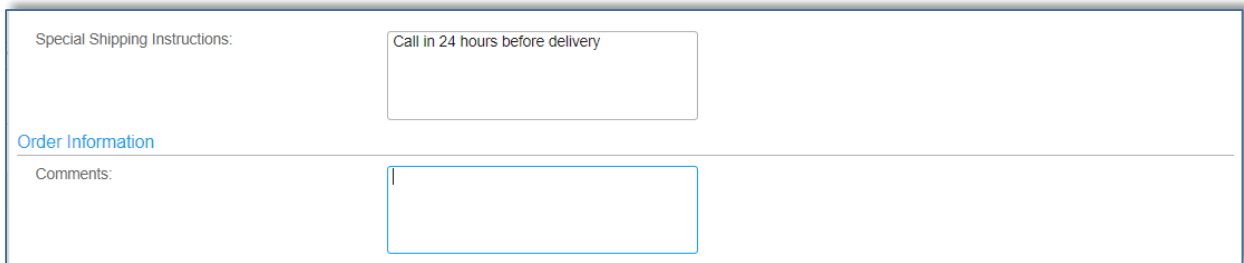
Estimating:



Estimating Information

Comments:

Order:

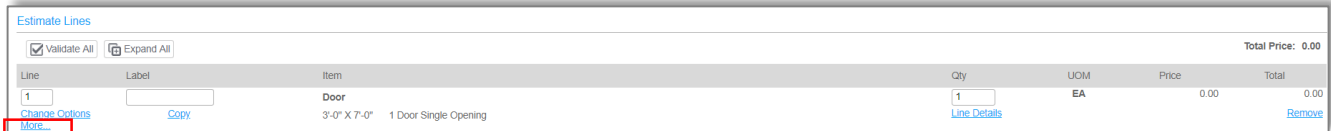


Special Shipping Instructions:

Order Information

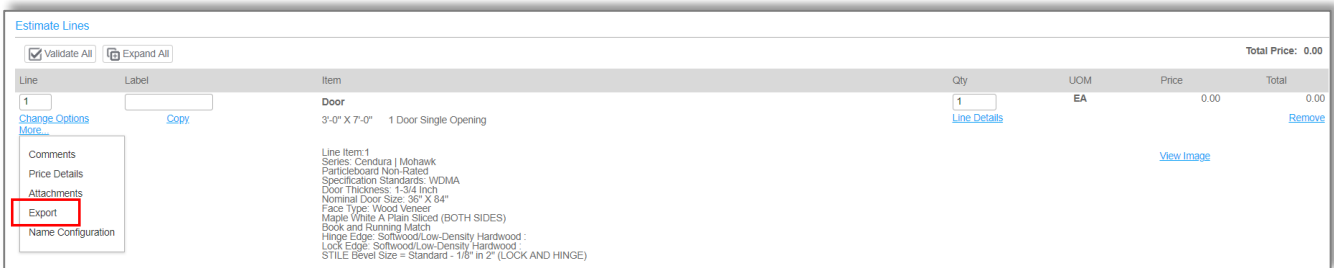
Comments:

2. To add a comment to a Line Item, click the **More** link and **select Comments** from the drop-down menu.



Line	Label	Item	Qty	UOM	Price	Total
1	<input type="text"/>	Door	1	EA	0.00	0.00

Change Options [More...](#) [Copy](#) [Line Details](#) [Remove](#)



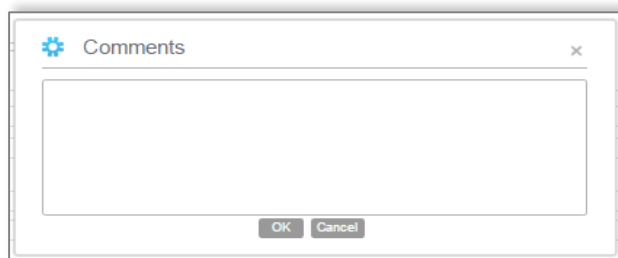
Line	Label	Item	Qty	UOM	Price	Total
1	<input type="text"/>	Door	1	EA	0.00	0.00

Change Options [More...](#) [Copy](#) [Line Details](#) [Remove](#)

- Comments
- Price Details
- Attachments
- Export
- Name Configuration

Line Item: 1
Series: Cendura | Mohawk
Particleboard Non-Rated
Specification Standards: WDMA
Door Thickness: 1-3/4 inch
Nominal Door Size: 36" X 64"
Face Type: Wood Veneer
Maze: White A Plain Sliced (BOTH SIDES)
Book and Running Match
Hinge Edge: Softwood/Low-Density Hardwood
Lock Edge: Softwood/Low-Density Hardwood
STYLE Bevel Size = Standard - 1/8" in 2" (LOCK AND HINGE)

Type your comments into the field on the Comments dialog window. These comments that will go on all Documents as well



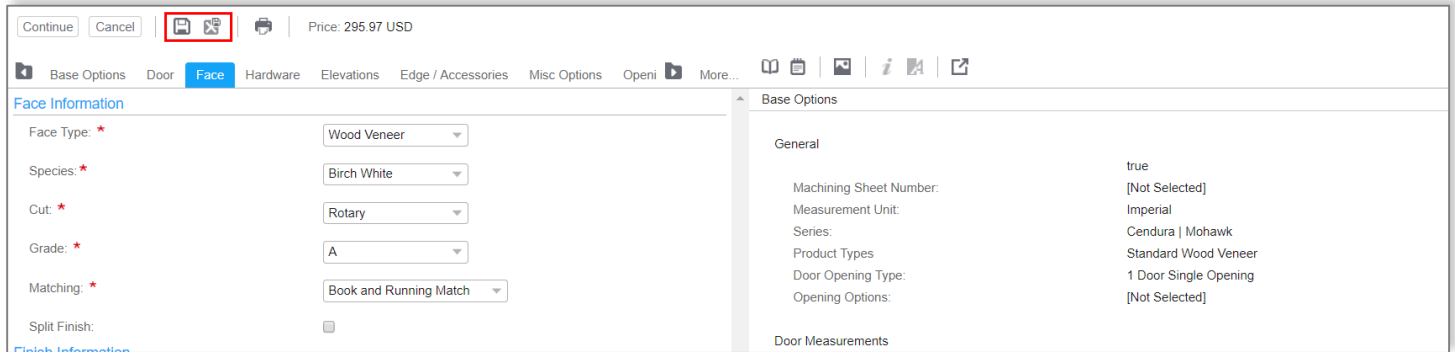
Comments

OK Cancel

Save Items

1. Click the **Save icon** on the top of the configuration window to save your configuration settings. You can also save and exit the line which will return you to the shopping cart.
2. The **Save and Exit** icon will save your progress and bring you back to the Shopping Cart

**** Please save often while you are in a configuration**



Copy and Edit Items

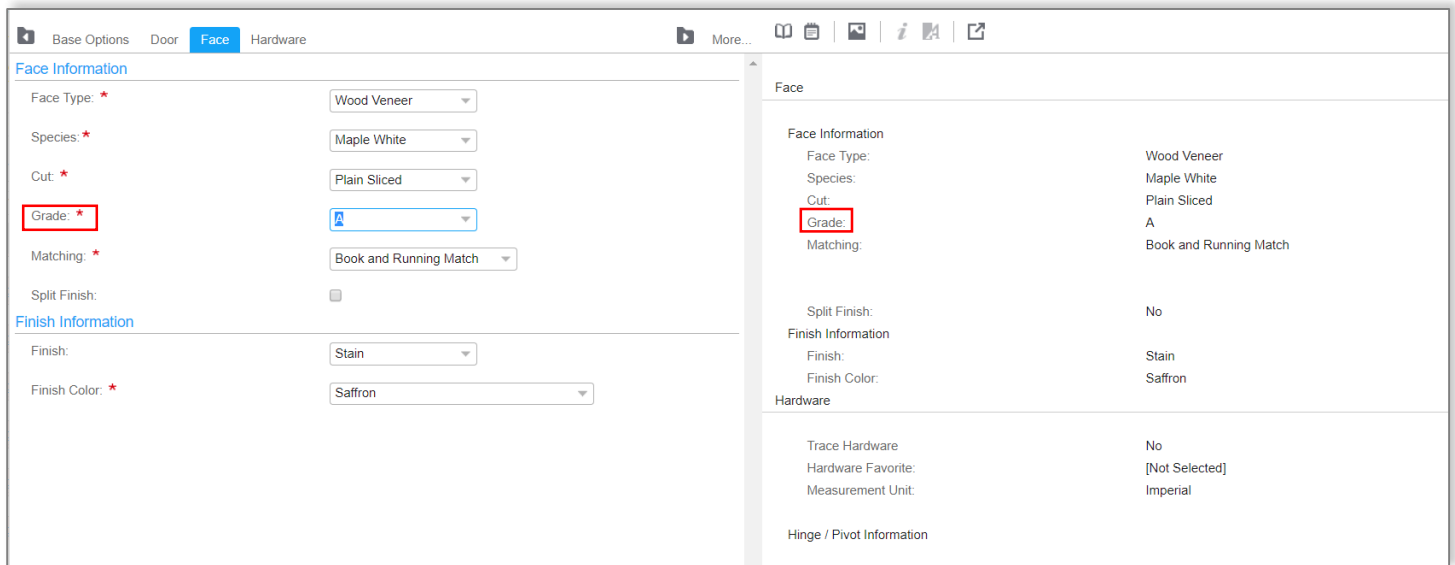
1. Click the **Copy** link to copy a Line item In the Shopping Cart

Quote Lines							Total Price: 887.91
Line	Label	Item	Qty	UOM	Price	Total	
1	Change Options More...	Door 3'-0" X 7'-0" 1 Door Single Opening	1	EA	295.97	295.97	
	Copy		Line Details			Remove	
2	Change Options More...	Door 3'-0" X 7'-0" 1 Door Single Opening	1	EA	295.97	295.97	
	Copy		Line Details			Remove	
3	Change Options More...	Door 3'-0" X 7'-0" 1 Door Single Opening	1	EA	295.97	295.97	
	Copy		Line Details			Remove	

2. To modify a Line Item, click the **Change Options** link on a Line Item to open the **Change Options** entry window

Quote Lines							Total Price: 887.91
Line	Label	Item	Qty	UOM	Price	Total	
1	Change Options More...	Door 3'-0" X 7'-0" 1 Door Single Opening	1	EA	295.97	295.97	
	Copy		Line Details			Remove	
2	Change Options More...	Door 3'-0" X 7'-0" 1 Door Single Opening	1	EA	295.97	295.97	
	Copy		Line Details			Remove	
3	Change Options More...	Door 3'-0" X 7'-0" 1 Door Single Opening	1	EA	295.97	295.97	
	Copy		Line Details			Remove	

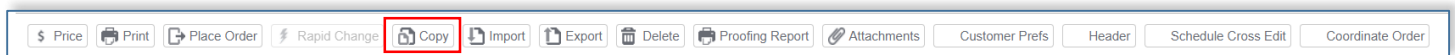
- When the Change Option entry window pops up, update the fields as required. Click the **Continue** button & check the **Check Configuration** box in the Misc. Options tab and then click the **Finish** button to save the new data and close the Change Options entry window.
- You can use the summary on the right panel to find the item you would like to change. Simply find it in the list and click it to be immediately taken to that question for changes.



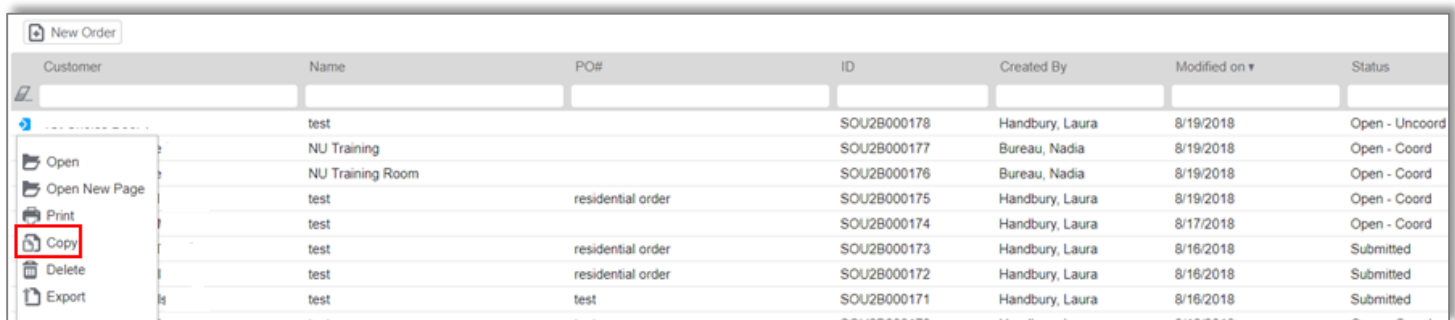
TIP: Many people find that copying complete line items and editing is faster than starting a new item. Make sure you are double checking your order if you use copy and edit often so nothing is missed or forgotten.

Copy Entire Estimates or Orders

- If you want to copy the entire Estimate or Order you can do so with the copy button on the Action Bar when you are currently in an Estimate or Order



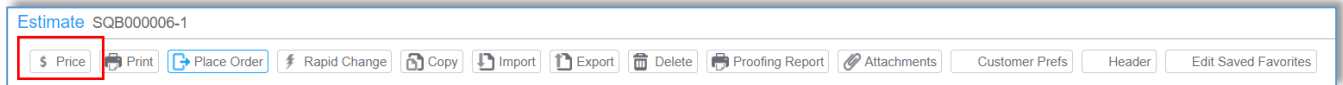
- You can also Copy Estimates or orders from the Search Grids by using the icon in the far left side of an order



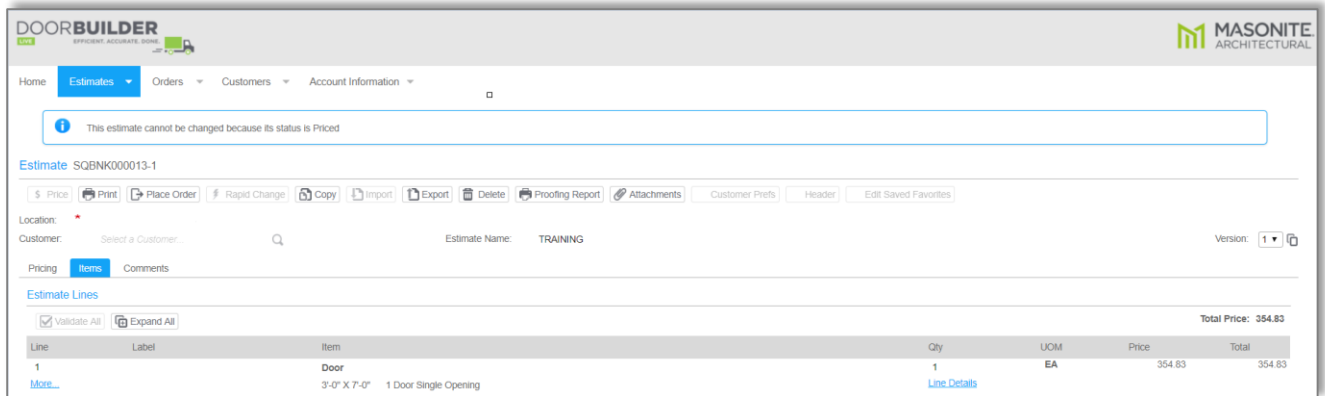
Price Estimate

When all of your lines are complete and double checked, it is time to price your estimate.

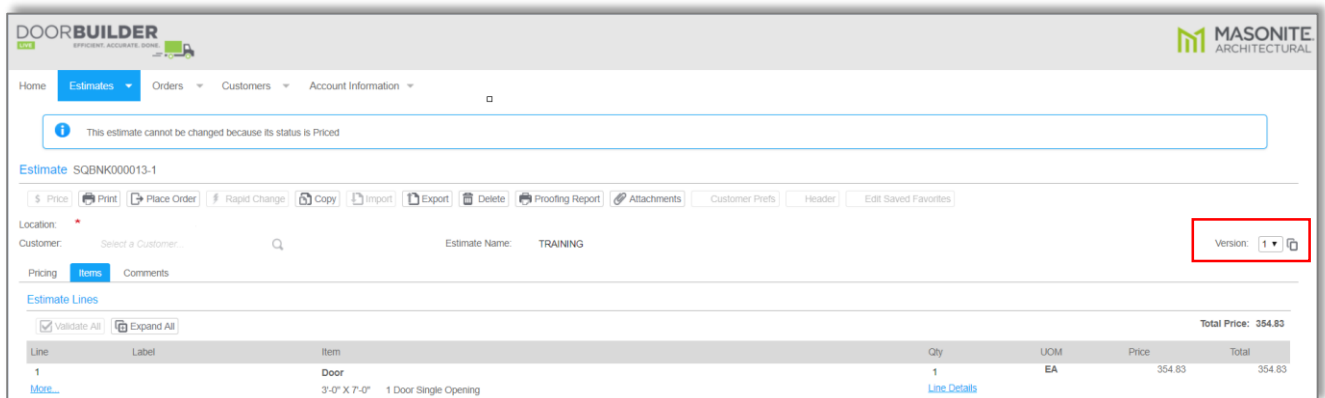
1. Click the **Price** button on the Action Bar to price the order.
2. The system will then price all lines and refresh the page with your complete pricing.
3. You will get a message if there are any items on your Estimate with pricing issues.



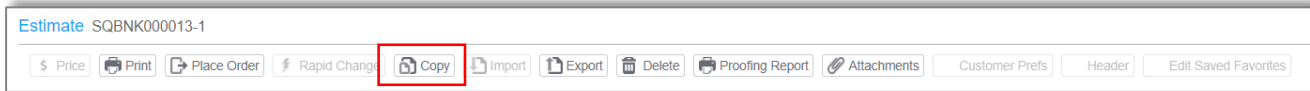
4. Your estimate will lock once it has been successfully priced and you will not be able to make any changes to the lines.



5. If you want to make changes to your Estimate you must copy the estimate or make a new version of the Estimate. To make a new Version of the Estimate, use the **Version** button on the right hand side of the screen. This version will have the same Estimate Number but with -2 or the next sequential number.



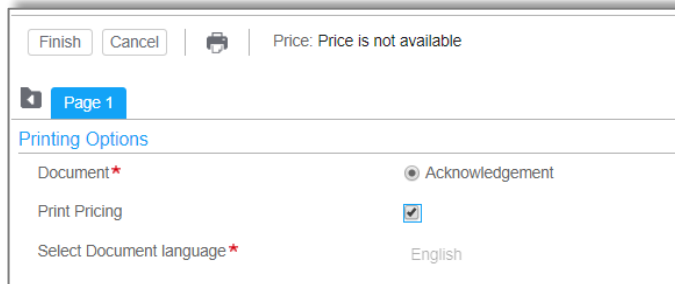
- If you want to copy the Estimate instead, use the **Copy** button on the Action Bar. This will generate an entirely new Estimate Number



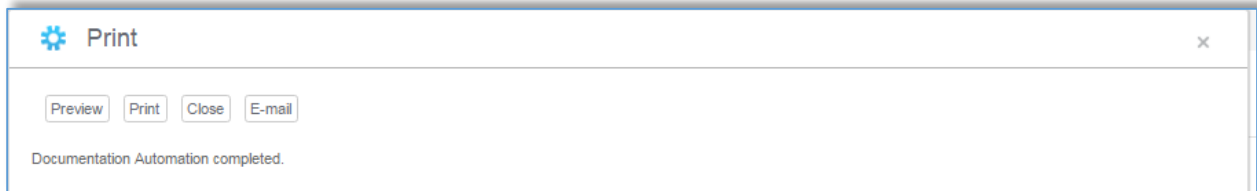
** We recommend using versions if you want to get multiple versions of the same job (i.e. a birch version or a red oak version). If it is a different job or different phases of a job, we recommend copying.

Print Estimate

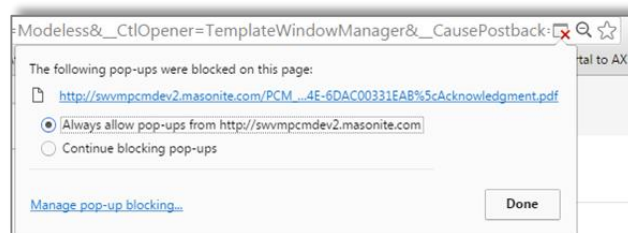
- Click the **Print** button (next to the Price Button) to launch the print screen
- When the Print screen appears, there are some special features available to internal users such as Price Override.
- Click the **Finish** button to complete the process



- Click the **[Preview]** button to generate the Customer Acknowledgement file

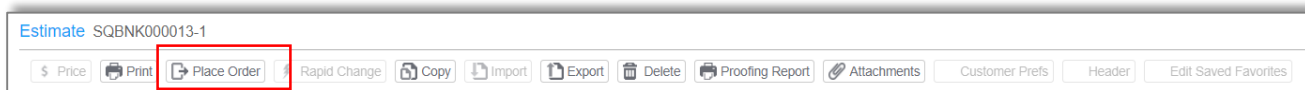


- The Configurator opens a new tab in your browser and displays the Customer Acknowledgement in a PDF format. If you don't see the new tab, you must allow Masonite pop-ups. **Check your pop-up blocker.**

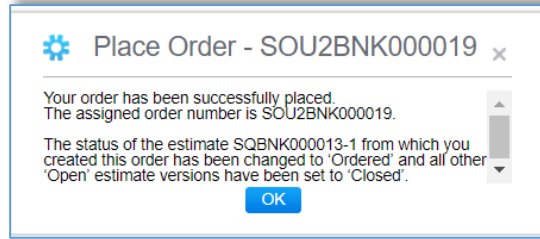


Convert Estimate to Order

- If you would like to convert your Estimate to an Order, use the Place Order button.



2. You will get a notification that the submittal is successful.



** Note – When you convert an estimate to an order, all other versions of the estimate will close.

3. You will then be taken into your order. It will have a new number that is different to the estimate. The Header will open first. All information from the Estimate will be filled out, but you will be required to enter information that is specific to orders.

Continue Cancel Price: Price is not available

Page 1 More..

Select Manufacturing Site: * Northumberland

Job Name: * TRAINING

Order Type: * Order Mock-Up

Estimate Number: SQBNK00013-1

Sector: * Office

Construction: New Construction Tenant Improvement

Requested Shipping Date: 10/22/2018

Lead time will depend on various factors, including product availability, manufacturing capacity, and the level of product customization requested. You may refer to the Lead Time Letter for additional information

PO Number: 986B-58

Total Number of Doors on PO:

PO Date: 8/24/2018

4. All of your lines from the Estimate will be in the shopping cart. They will be marked yellow which means required validation. Use the Validate All button to validate the lines. If they are red, it means that there is information that must be filled in for the Order that you did not have to fill in for the Estimate. Click Change Options on the red lines to go in and fill out the missing information.

Order Lines Total Price: 0.00

Validate All Expand All

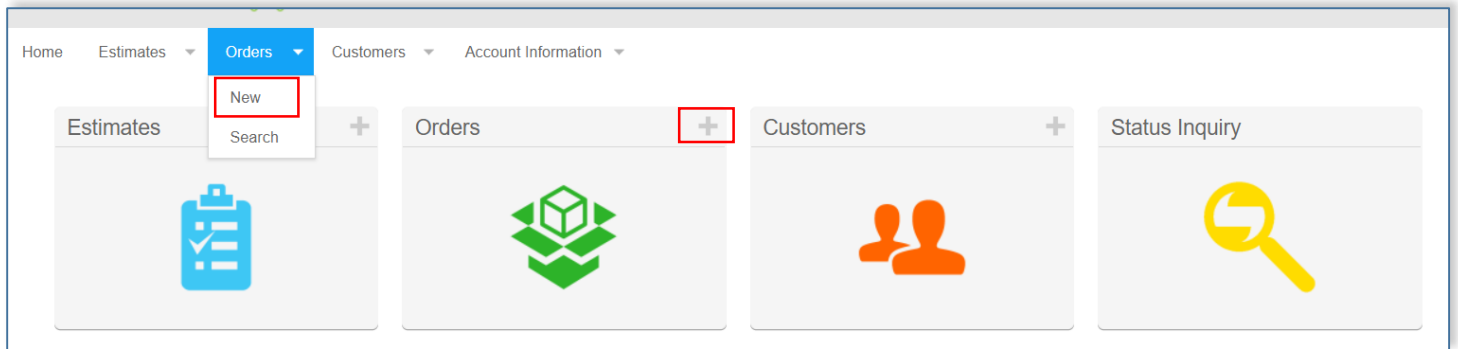
Line	Label	Item	Qty	UOM	Price	Total
1	<input type="text"/>	Door	<input type="text" value="1"/>	EA	Attention Required	Remove
	Change Options	Start Over				
2	<input type="text"/>	Door	<input type="text" value="1"/>	EA	Attention Required	Remove
	Change Options	Start Over				

** Some users find it easier to Start a new order rather than use the convert functionality due to the amount of extra information needed to make an order. But if you convert your estimate, all the attached documents and comments will carry over so, instead of starting a new order, it can be practical to just delete the lines and enter new ones.

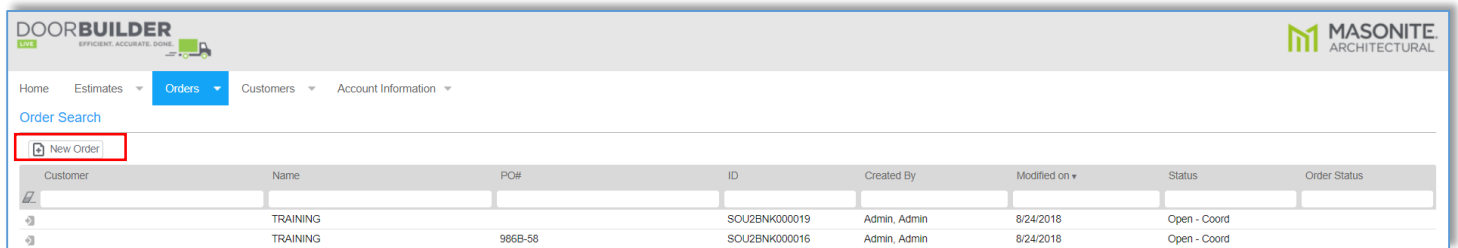
Start Order and Create Header

To start a new Order from the **Home** screen:

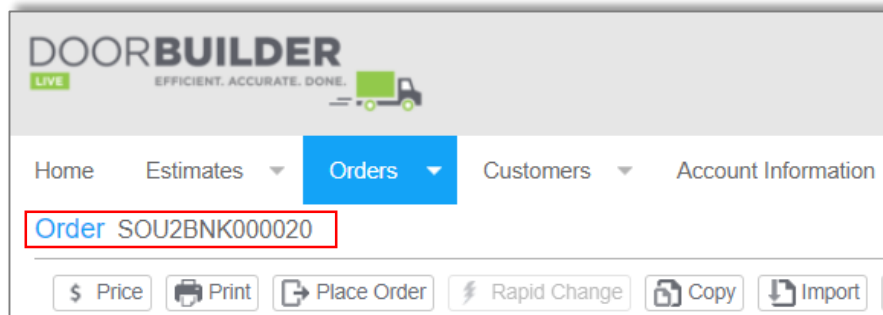
1. Click the **+** sign on the Orders tile to go directly to a new quote data entry screen.
2. Use the **Navigation Bar** and select **New** from the **Orders** drop-down menu



3. To start a new Order from the **Order Search** screen select the **New Order** button.



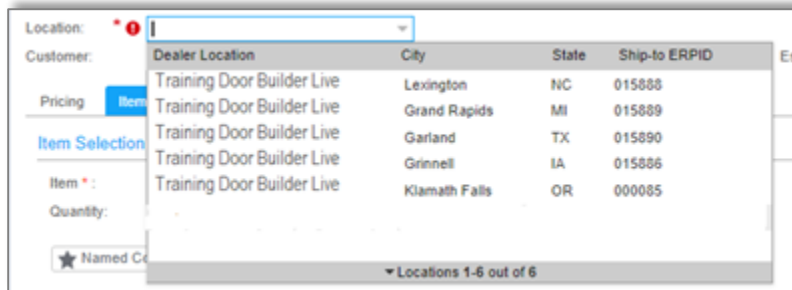
4. You will be presented with the **Order Entry** screen. Note that your Order number now appears below the navigation bar.



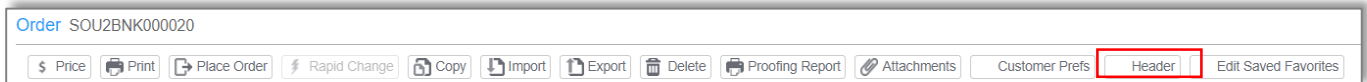
Create Header with Job Information

Note: All fields with a red asterisk (*) are required. We default many of the fields, however, you must review each field and change or supply missing information as needed.

1. **Select a Location** from the drop-down list if your site has multiple location. If not the system, will default to the main location.



2. **After selecting the location you will be presented with the Header pop-up window Or you can launch it by clicking Header in the Action Bar.**



- **Preferred** manufacturing location has been set to Northumberland.
- Enter a **Job Name** which can be used for order searching
- Select **Sector** from the drop-down list
- Enter the **Requested Ship Date** or select date from the pop-up calendar
- Enter **PO Number**

Continue Cancel Price: Price is not available

Page 1 More..

Select Manufacturing Site: * Northumberland

Job Name: * TRAINING

Order Type: * Order Mock-Up

Estimate Number: SQBNK00013-1

Sector: * Office

Construction: New Construction Tenant Improvement

Requested Shipping Date: 10/22/2018

Lead time will depend on various factors, including product availability, manufacturing capacity, and the level of product customization requested. You may refer to the Lead Time Letter for additional information

PO Number: 986B-58

Total Number of Doors on PO:

PO Date: 8/24/2018

- **Total Number of Doors on PO** is an optional question if you want the system to verify that the quantity you enter here matches the total quantity of door that will result your order. If the quantity does not match, the system will warn you.

3. Scroll down to verify the **Shipping Information**. Select **One time ship to** if you have a jobsite delivery or the address is not in the dropdown.
4. You must select a **Transport Mode** from the available dropdown list.

Ship To: *	One-Time Ship-To
Ship To Name: *	TRAINING ROOM
Street (line 1): *	123, 7TH STREET
Street (line 2):	
Street (line 3):	
Country: *	US
State: *	PA
Zip Code: *	17857
City: *	Northumberland
Job Site Delivery: *	Yes
Transport Mode: *	Pool Truck
Crating Option:	Premium Crate
Delivery Terms: *	FOB Destination
Packing Instructions 1:	Segregation By Floor
Packing Instructions 2:	
Segregation by Floor: *	<input checked="" type="checkbox"/>
Export Package:	<input type="checkbox"/>

Delivery Contact Info	
Name: *	John Doe
Phone:	418-000-0000
Fax:	418-111-1111
Email:	
Special Shipping Instructions:	Call in 24 hours before delivery
Order Information	
Comments:	
Auto Coordinate:	<input type="checkbox"/>

5. When completed select the **Finish** button in the top left corner of the window.

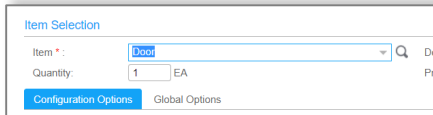
TIP: You can make changes to the job information by selecting the Header button in the Action Bar.

Order SOU2BNK000020												
\$ Price	Print	Place Order	Rapid Change	Copy	Import	Export	Delete	Proofing Report	Attachments	Customer Prefs	Header	Edit Saved Favorites

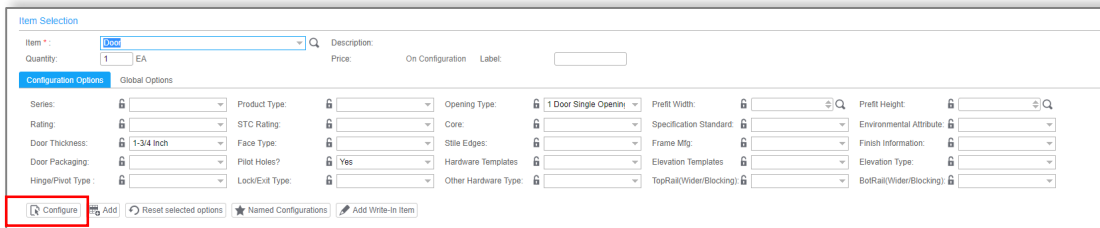
Configure Line Items – Single Door

After entering the Order Header, the next task in creating an Order is to **enter a Line Item**. These Line Items you enter will go into your Shopping Cart, which displays the products in your Order. The procedure below explains how to use The Configurator to enter a Line Item for a pre-machined door.

1. Select **Door** to configure from the item drop-down list

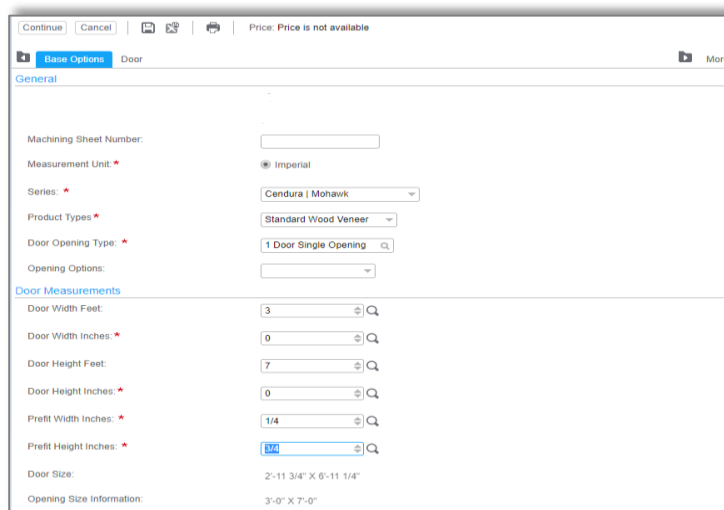


2. Once an item is selected, the Quantity field is displayed. This Quantity will apply for the line that you will create. You can change the Quantity as needed.
3. Select the **Configure** button to open the Configuration screen



4. It opens the configuration screen to the Base Options tab.

- Select the **Series** from the drop-down list
- Select the **Product Type** from the drop-down list
- Select the **Door Opening Type** from the drop-down list – leave this as 1 Door Single Opening
- Enter the **Door Measurements** – you will need to enter your opening size first and then your prefits. Your actual Door size will print below.



Tip: Save often to avoid losing input data. The save icon is on the top left of the Configurator, next to the [Cancel] button.

Click the **Door tab** or the **Continue** button to display the next entry fields.

- Select the **Rating** from the drop-down list. If the door has a fire rating, the minutes specification of the door must be provided
- Select the **Core Material** (ie. Particleboard, SCLC, etc....) from the drop-down list
- Check the **Floating/Non-bonded Core** box if you have a non-bonded core.
- The **Specification Standards** will be defaulted for you – use the drop-down if you need a different option
- The **Environmental Attributes** will be defaulted for you – use the dropdown if you need a different option
- The **Thickness** of the door will be defaulted for you – use the dropdown if you need a different option

The screenshot shows a 'Configure' window with a settings icon and the title 'Configure'. At the top, there are buttons for 'Continue' and 'Cancel', along with icons for save, copy, and print. A status message reads 'Price: Price is not available'. Below this, there are tabs for 'Base Options', 'Door' (which is selected), and 'Face', followed by a 'More...' button. The 'Door Information' section shows 'Door Size: 2'-11 3/4" X 6'-11 3/8"'. The 'Construction Information' section contains several fields: 'Rating: *' with a dropdown set to 'Non-Rated'; 'STC Rating:' with an empty dropdown; 'Core Material: *' with a dropdown set to 'Particleboard'; 'Floating / Non-bonded Core:' with an unchecked checkbox; 'Smoke Label:' with an unchecked checkbox; 'Specification Standards: *' with a dropdown set to 'WDMA'; 'Environmental Attributes: *' with a dropdown set to 'None'; and 'Thickness: *' with a dropdown set to '1-3/4 Inch'.

5. Click the **Face** tab or the **Continue** button to display the next entry fields.
 - If available, determine Yes or No for the **Split Species** (not all door constructions offer split species). If you select **Yes**, the inside and outside of the door will be made with different materials
 - Fill out the Face Information data. If Split Species is **Yes**, you will need to fill out the data for the inside and the outside of the door
 - If available, determine Yes or No for **Split Finish** (not all door constructions offer split finish). If you select **Yes**, the inside and outside of the door will be finished with different coats
 - Fill out the Finish Information data. If Split Species is **Yes**, you will need to fill out the data for the inside and the outside of the door

The screenshot shows a software interface with a top navigation bar containing tabs: Base Options, Door, Face (selected), Hardware, Elevations, Edge / Accessories, Misc Options, and Opening Nums. Below the tabs, the 'Face Information' section includes the following fields:

- Face Type: * (Wood Veneer)
- Species: * (Oak Red)
- Cut: * (Plain Sliced)
- Grade: * (A)
- Matching: * (Book and Running Match)
- Split Finish:

Below this is the 'Finish Information' section with the following field:

- Finish: (Clear)

6. Click the **Hardware** tab to display the next information entry fields
 - Select the **Hinge or Pivot** Hardware Type (ie. Continuous Hinge, Hinge, or pivot)
 - Select the **Sub Category** from drop down list
 - Select the **Hardware Part Number**
 - Proceed to fill out the remaining required fields
 - If your Hinge Quantity does not match the total Hinge Quantity you will be asked to enter additional Hinges
 - Select the **Lock/Exit Device Type** (ie. Continuous Hinge, Hinge, or pivot)
 - Select the **Sub Category** from drop down list
 - Select the **Hardware Part Number**
 - Proceed to fill out the remaining required fields
 - If you have multiple locks use the **Additional Lock/Exit Device** question
 - Add any additional hardware (ie. Holder, Closer, Viewer, any Surface applied Hardware) under 'Other Hardware Information'
 - If you have more than one additional hardware type, use the **Additional Hardware** question

Lock / Exit Device Information

Lock / Exit Device Type:

Sub Category: *

Hardware Search:


Hardware Part Number: *


Hardware Manufacturer: *

Backset: *

Hardware Template: *

Description: L905 Rev. 08/14, L1 Rev. 08/14, Trim: ROSE, FacePlate Width: 1 1/4 Template Date: 2014-08-01 Trim Date: 2014-08-01

 Template Drawing 1

 Template Drawing 2

Additional Lock / Exit Device? Yes No

Other Hardware Information

Hardware Type:

Sub Category:

Hardware Search:

Hardware Part Number: *

Stop Side *

Hardware Manufacturer: *

Hardware Template: *

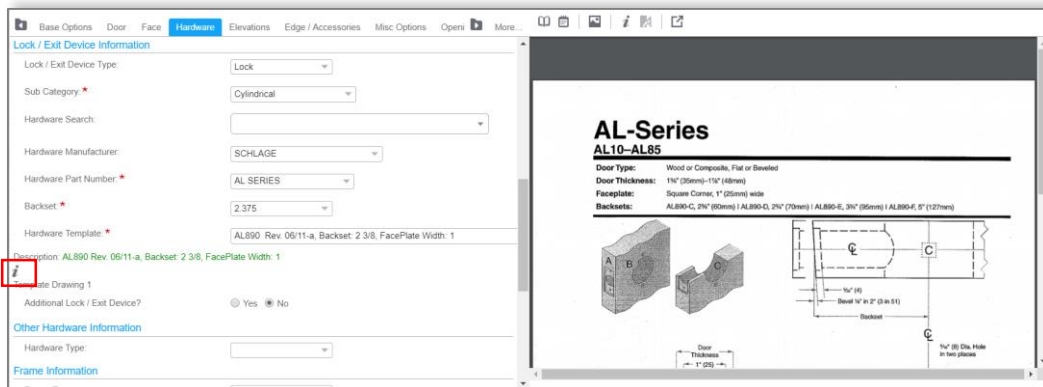
Description: 369

Additional Lock / Exit Device? Yes No

Lock / Exit Device Type:

**** TIP if you find that you have added a piece of hardware that you no longer want to be on your line, you can either change the hardware type to be blank or change it to delete.**

- If you see an **i** icon on your Hardware Screen it means that a hardware template is available for viewing. Click the **i** icon to view the template on the right-hand side of the screen. These will also print out with your order acknowledgement.



8. Enter your Frame Information

- Your **Frame Type** will be defaulted to **Standard**, if you have a custom frame select **Custom**.
- Enter your **Frame Manufacturer** if Standard. The locations will populate for you.

Frame Information	
Frame Type:	Standard
Frame Manufacturer: *	Ceco
Frame Height: *	84

Location Information	
Hinge Location 1: *	6.625000
Hinge Location 2: *	39.625000
Hinge Location 3: *	72.625000
Hinge Backset: *	0.25000

**** TIP if you have a custom lock with standard hinge locations, start with the Standard Frame Type and then switch to custom, which will allow you to edit the hinge locations and add lock location.**

Frame Information	
Frame Type:	Custom
Frame Height: *	84

Location Information	
Hinge Location 1: *	6.625000
Hinge Location 2: *	39.625000
Hinge Location 3: *	72.625000
Hinge Backset: *	0.25000
Card Location 1 (Top to Centerline of Lock Front): *	35.000000

9. Click the **Elevations** tab to display the next information entry fields
 - Select an **Elevation Type**, (ie. Applied Moulding, Lite Cutout, Louver, or Applied Grilles) to add to your door configuration.
 - Fill out the required information for the Elevation Type you select. This will include location questions, beading questions etc.

Use the **Add Additional Elevations** button to add more than one elevation to your order.

10. Click the **Edge / Accessories** tab to display the next information entry fields

- Use the **Non-Standard Stiles or Rails** question to add Blocking, larger Stiles or Rails, etc. to your door configuration

**Please note, the default construction based on your selections or hardware will be defaulted for you. You do not need to select a larger bottom rail or a radius hinge if you have added hardware that requires it.

The screenshot shows the 'Edge / Accessories' configuration tab. The navigation bar includes: Base Options, Door, Face, Hardware, Elevations, **Edge / Accessories**, Misc Options, and Opening Nums. The main content area is divided into four sections:

- Stile Information**
 - Hinge Stile Bevel: * (Dropdown: Standard - 1/8" in 2")
 - Hinge Stile Edge Option: * (Dropdown: Softwood/Low-Density Hardwood)
 - Non-Standard Hinge Stile: (Checkbox:)
- Lock Stile Information**
 - Lock Stile Bevel: * (Dropdown: Standard - 1/8" in 2")
 - Lock Stile Edge Option: * (Dropdown: Softwood/Low-Density Hardwood)
 - Non-Standard Lock Stile: (Checkbox:)
- Rail Information**
 - Non-Standard Rails: (Checkbox:)
 - Top Rail Rabbet: (Checkbox:)
 - Top Rail Groove: (Checkbox:)
 - Top Rail (Height | Blocking): (Dropdown: [Empty])
 - Bottom Rail Groove: (Checkbox:)
 - Bottom Rail (Height | Blocking): (Dropdown: [Empty])
 - No Markings On Rails: (Dropdown: [Empty])
- Stiles and Rails Finish Information**
 - Top Rail Finish: (Checkbox:)
 - Bottom Rail Finish: (Checkbox:)
 - Seal Rails: (Checkbox:)

11. Click the **Misc Options** tab to display the next entry fields

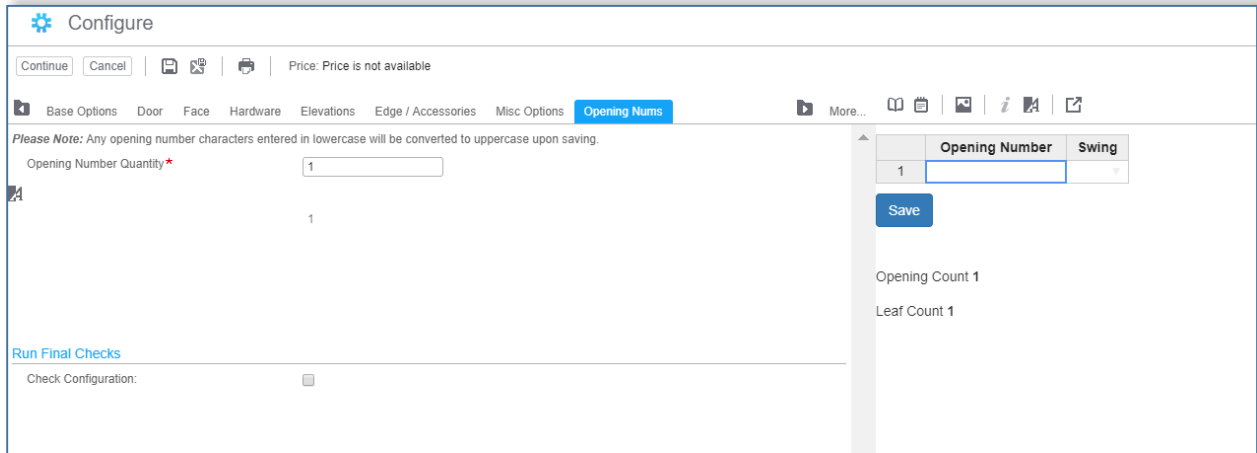
The screenshot shows the 'Misc Options' configuration tab. The navigation bar includes: Base Options, Door, Face, Hardware, Elevations, Edge / Accessories, **Misc Options**. The main content area contains:

- Door Packaging: (Dropdown: Standard Packaging)
- Cleat Doors: (Checkbox:)

Note: Standard Packaging will be whatever the plant will default based on your configuration. This could be dependent on whether you have an elevation in the door or the door is finished.

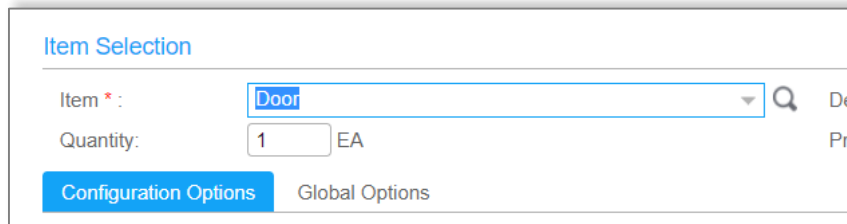
12. Click the **Opening Nums** tab or the **Continue** button to display the last tab.

- Enter the **Opening Number Quantity**
- Click on the icon under the field Opening Number Quantity. It will open a sheet on the right side of the configurator for you to input the Opening Number and the Swing of the door
- Check the **Check Configuration Box**, and click **Finish**



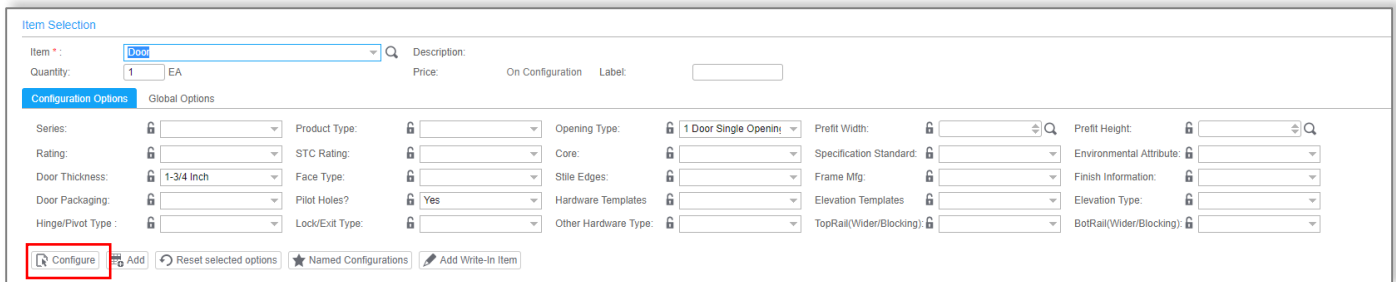
Configure Line Items – Pair/Set

1. Select **Door** to configure from the item drop-down list



2. Once an item is selected, the **Quantity field** is displayed. This Quantity will apply for the line that you will create. You can change the Quantity as needed. For a Pair a Quantity of '1' means one opening of two doors (Active/Inactive)

3. Select the **Configure** button to open the Configuration screen



4. Click **Configure** to open the configuration screen to the Base Options tab.

- Select the **Series** from the drop-down list

- Select the **Product Type** from the drop-down list
- Select the **Door Opening Type** from the drop-down list – Make Sure this is selected as 2 door Pair Opening
- Enter the **Door Measurements** – This will be the opening size and prefits for the first door. The system will default to an equal pair but if you have an unequal pair, use the Unequal Size checkbox

Continue Cancel Save Print Price: Price is not available

Base Options Door1 (Active) Face (1) Hardware (1)

Set Configuration: * Pair of Doors in Same Opening

Opening Options: * Standard Pair

Transom:

Door 1 Measurements

Door Width Feet: []

Door Width Inches: * 36

Door Height Feet: []

Door Height Inches: * 84

Prefit Width Inches: * 3/4

*Unless if a Continuous Hinge is used, Masonite Architectural strongly suggests using 3/16" Prefit Width for Pair Configuration

Prefit Height Inches: * 1/4

Door Size: 35.25" X 83.75"

Door 2 Measurements

Unequal Size:

5. You will notice that your tabs at the top now have a (1), (2) etc. This is to dictate which door in the pair/set you are currently on.
 - Follow the steps from the Single Door path to fill in all of the (1) tabs.
 - Add an Astragal/Edge accessory if needed on the Edge and Accessories (1) tab

Edge Accessories

Edge Accessory Material: * Metal Stainless Steel

Edge Accessory Type: * ME Set 208 SS

6. Most of your information will be defaulted from Door 1 to Door 2.

7. Fill in the Hardware (2) tab

- Use the available copy functions, to copy any set of Hardware from your Previous Door.

The screenshot shows the 'Hardware (2)' configuration tab. At the top, there are tabs for 'Elevations (1)', 'Edge / Accessories (1)', 'Misc Options (1)', 'Door2 (Inactive)', 'Face (2)', and 'Hardware (2)'. The 'Hardware (2)' tab is active. Below the tabs, there are several configuration options:

- Trace Hardware:** Radio buttons for 'Yes' and 'No', with 'No' selected.
- Hardware Favorite:** A dropdown menu.
- Measurement Unit:** Radio buttons for 'Imperial' (selected) and 'Metric'.
- Hinge / Pivot Information:**
 - Copy Previous Hinge/Pivot:** A checkbox that is checked and highlighted with a red box.
 - Hardware Type:** A dropdown menu with 'Hinge' selected.
 - Total Number of Hinges on Frame:** A numeric input field with '3' and a search icon.
- Sub Category:** A dropdown menu with 'Standard' selected.
- Hardware Search:** A dropdown menu.
- Hinge Height:** A dropdown menu with '4.5' selected.
- Hardware Manufacturer:** A dropdown menu with 'HAGER' selected.
- Hardware Part Number:** A dropdown menu with '1277' selected.
- Hardware Template:** A dropdown menu with 'T314 REV.96, Length: 4 1/2, Gauge: 0.134' selected.

8. Fill in the Elevations (2) tab

- You can also use the copy feature to copy any elevations from Door 1.

The screenshot shows the 'Elevations (2)' configuration tab. At the top, there are tabs for 'ce (1)', 'Hardware (1)', 'Elevations (1)', 'Edge / Accessories (1)', 'Misc Options (1)', 'Door2 (Inactive)', 'Face (2)', 'Hardware (2)', and 'Elevations (2)'. The 'Elevations (2)' tab is active. Below the tabs, there are several configuration options:

- Copy Elevations from Previous Door:** A checkbox that is checked and highlighted with a red box.
- Measurement Unit:** Radio buttons for 'Imperial' (selected) and 'Metric'.
- Elevation Type:** A dropdown menu with 'Lite Cutout' selected.
- Cutout Information:**
 - Number of Cutouts:** A numeric input field with '1' and a search icon.
- Cutout 1:**
 - Cutout Type:** A dropdown menu with 'Metal Vision Frame (Standard)' selected.
 - Measurement Type Reference:** A dropdown menu with 'Visible Glass Size' selected.
 - MVF Moulding:** A dropdown menu with '110 - All Metal Stamping' selected.
 - Width Inch:** A numeric input field with '3.000000' and a search icon.
 - Height Inch:** A numeric input field with '33.000000' and a search icon.
 - Top Rail Dimension Inch:** A numeric input field with '10.000000' and a search icon.

9. Click the **Edge / Accessories** tab to display the next information entry fields
 - Use the **Non-Standard Stiles or Rails** question to add Blocking, larger Stiles or Rails, etc. to your door configuration
- **Please note, the default construction based on your selections or hardware will be defaulted for you. You do not need to select a larger bottom rail or a radius hinge if you have added hardware that requires it.

10. Click the **Misc Options** tab to display the next entry fields

Note: Standard Packaging will be whatever the plant will default based on your configuration. This could be dependent on whether you have an elevation in the door or the door is finished.

11. Click the **Opening Nums** tab or the **Continue** button to display the last tab.
 - Enter the **Opening Number Quantity** – Remember this is the quantity of openings not the quantity of individual doors.
 - Click on the icon under the field 'Opening Number Quantity'. It will open a sheet on the right side of the configurator for you to input the Opening Number and the Swings of the door
 - For a pair, you will need to Enter a unique opening number for each opening. You will need to enter a swing for each door in your opening
 - The Inactive Swing will default for you based on the active swing.
 - Check the **Check Configuration Box**, and click **Finish**

Please Note: Any opening number characters entered in lowercase will be converted to uppercase upon saving.

Opening Number Quantity

[Run Final Checks](#)

Check Configuration:

	Opening Number	Active Swing	InactiveSwing
1	101	LH	RH
2	102	RH	LH
3	103	LH	RH
4	104	RHR	LHR

Save

Opening Count 4

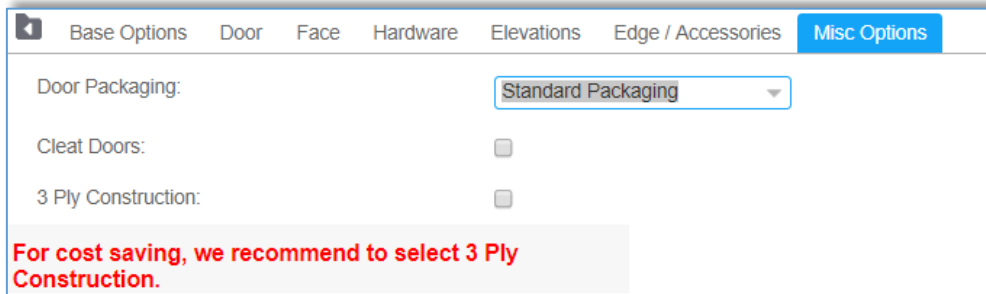
Leaf Count 8

Unique Configurations

This section is to help you navigate through some of the unique configurations in the configurator

3-Ply Plastic Doors

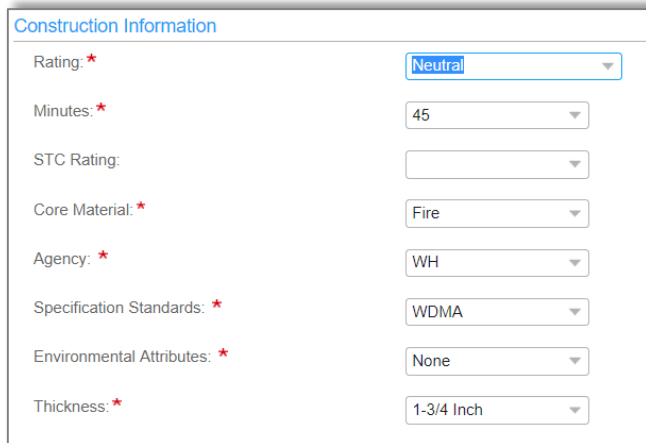
If you configure a Particle core with Plastic Faces, the system will default to a 5-ply Plastic construction but you can change this. If your plastic door is eligible to be a 3 ply plastic door you will see this on the Misc options tab.



The screenshot shows the 'Misc Options' tab in the configurator. It includes a navigation bar with 'Base Options', 'Door', 'Face', 'Hardware', 'Elevations', 'Edge / Accessories', and 'Misc Options'. The 'Misc Options' section contains a 'Door Packaging' dropdown set to 'Standard Packaging', a 'Cleat Doors' checkbox, and a '3 Ply Construction' checkbox. A red text message below the checkboxes reads: 'For cost saving, we recommend to select 3 Ply Construction.'

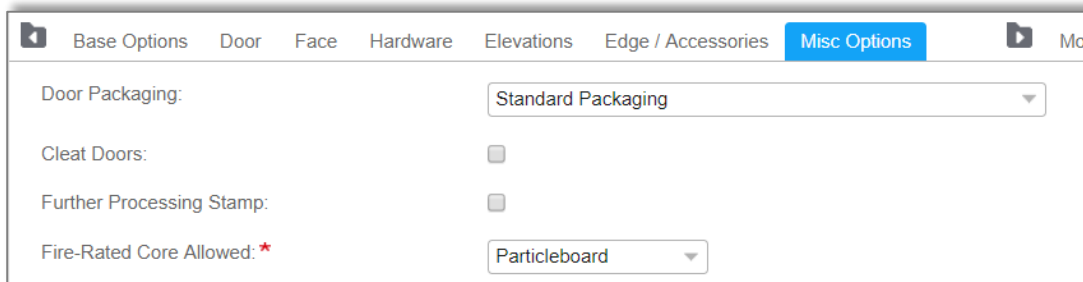
45 Minute Particle Core Doors

If you select a 45 minute rated door, the core selected by the configurator will be a 'Fire Core'.



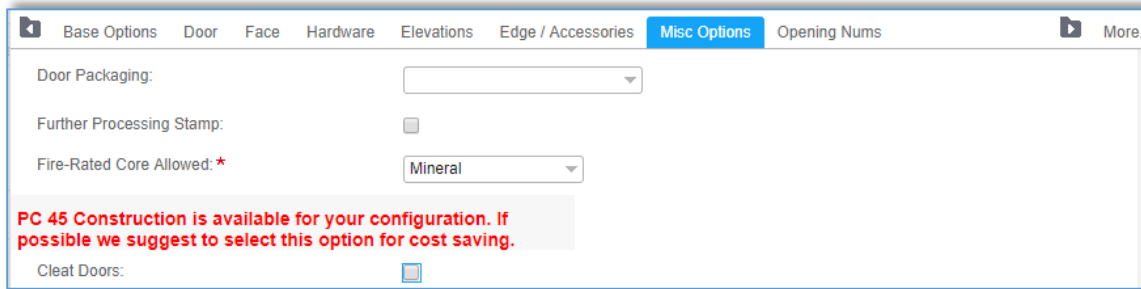
The screenshot shows the 'Construction Information' tab. It lists several settings: 'Rating' (Neutral), 'Minutes' (45), 'STC Rating' (empty), 'Core Material' (Fire), 'Agency' (WH), 'Specification Standards' (WDMA), 'Environmental Attributes' (None), and 'Thickness' (1-3/4 Inch).

If your configuration is eligible, the system will default a Particle Core 45 Minute.

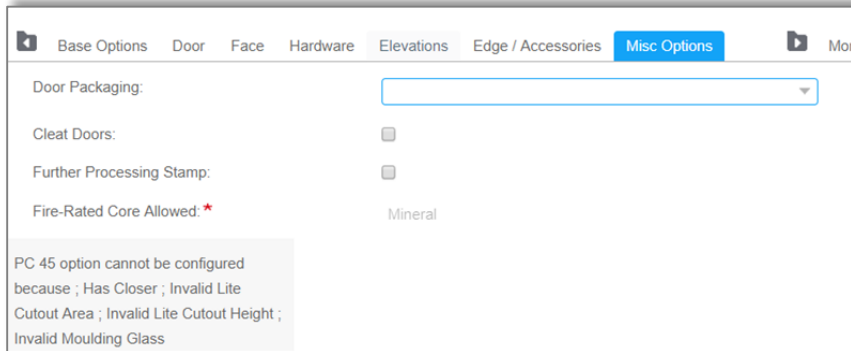


The screenshot shows the 'Misc Options' tab with the 'Fire-Rated Core Allowed' dropdown set to 'Particleboard'. Other options like 'Door Packaging', 'Cleat Doors', and 'Further Processing Stamp' are also visible.

However, you will be able to switch to a Mineral core on the Miscellaneous tab if this is what you need.



If the configuration it is not eligible, it will supply a reason why you cannot switch to Particle core.



If the PC 45 configuration is eligible and the only option that may void this option is the Blocking and you add it, the system will warn you that Blocking is not required for PC 45.



Selecting Electric Hardware

If your configuration requires Electric Hardware like Electric Hinge, you will need to enter them separately in the configuration. Select Electric under the Sub Category to specify it.

Here is an example under Generic Estimate

Hinge / Pivot Information	
Hardware Type:	Hinge
Total Number of Hinges on Frame: *	3
Sub Category: *	Standard
Hinge Quantity: *	2
Hardware Type: *	Hinge
Sub Category: *	Electric
Hinge Quantity: *	1

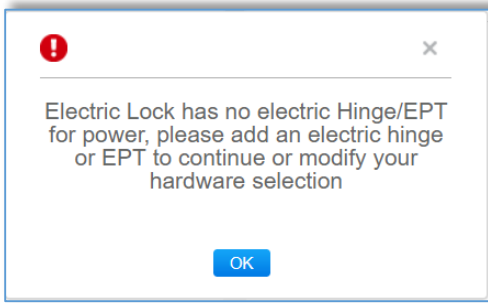
If you create a Detailed Estimate or an Order, Confirm the quantity of none Electric Hinge and their ordinal Position on the door.

Hinge / Pivot Information	
Hardware Type:	Hinge
Total Number of Hinges on Frame: *	3
Sub Category: *	Standard
Hinge Height:	4.5
Hardware Part Number: *	TA2314
Hardware Manufacturer: *	MC KINNEY
Hardware Template: *	030-10, Length: 4 1/2, Gauge: 0.134
Hinge Gauge:	0.134
Hinge Quantity: *	2
Ordinal Pos 1: *	1
Ordinal Pos 2: *	3

Then do the same for the Electric Hinge.

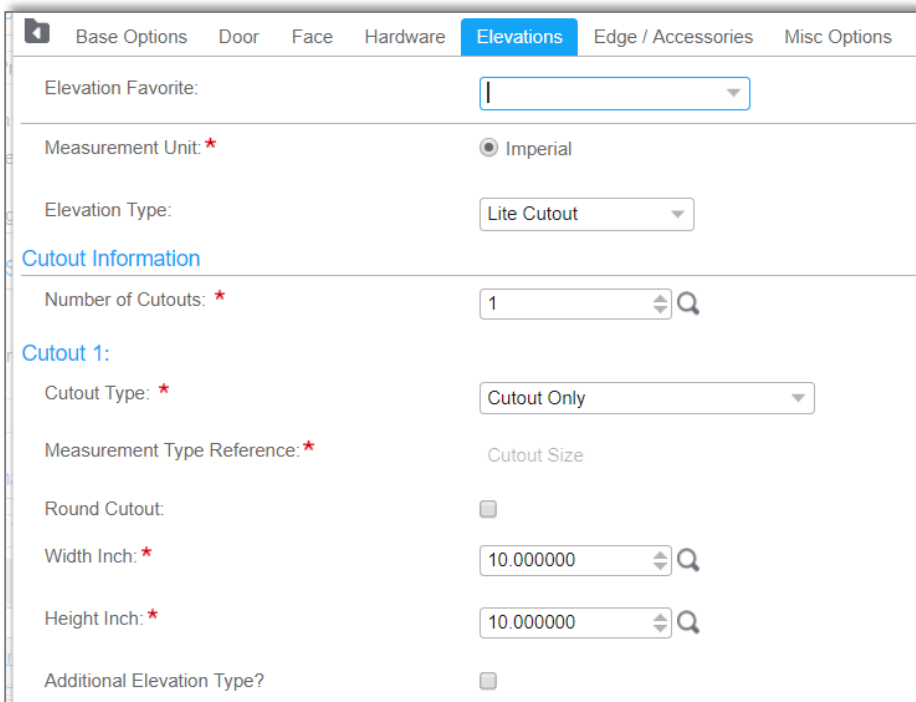
Hardware Type: *	Hinge
Sub Category: *	Electric
Hinge Height:	4.5
Hardware Part Number: *	TA2314XQC
Hardware Manufacturer: *	MC KINNEY
Hardware Template: *	278-10, Length: 4.5, Gauge: 0.134, Template Date: 2010-08-20
Hardware Template Drawing 1:	
Hinge Gauge:	0.134
Hinge Quantity: *	1
Ordinal Pos 3: *	2

Take note that if you enter an Electric Lock, Electric Exit Device or an Electric Strike without Electric Hinges, Electric Pivot, EPT, etc., you will get a critical warning to add one.



Entering Cutout Only on a Rated Door Vs Non-Rated Door

If your configuration requires a Cutout Only on a Non-Rated Door, select 'Cutout Only' under Cutout Type and fill out the require information.



If your configuration requires a Cutout Only on a Rated Door, you need to provide all the details related to the lite cutout to allow the system to validate if the lite cutout is fire allowed. Select the Cutout Type used (Bead or MVF), and the profile. Then select 'Cutout Only (Bead/MVF by Others)' option. Complete the require information.

The screenshot shows the 'Elevations' tab in a software interface. The 'Elevation Type' is set to 'Lite Cutout'. Under 'Cutout Information', 'Number of Cutouts' is 1. Under 'Cutout 1', 'Cutout Type' is 'Metal Vision Frame (Standard)', 'Measurement Type Reference' is 'Visible Glass Size', 'MVF Moulding' is '110 - All Metal Stamping', and 'Cutout Only (Bead/MVF by Others)' is checked. Dimensions are: Width 18.000000, Height 36.000000, Glass Thickness 1/4 Inch, and Glass 'Wirelite NT - Georgian Pattern'.

**Image from Generic Estimate. If you create a Detailed Estimate or an Order – The location will be required.

Entering Special Bead Profile Or Custom Profile Applied Moulding

If your door requires a Special Bead Profile or a Custom Profile Applied Moulding, select the **Special/Custom** option in the drop down list. It will bring a new field to enter your Drawing Number or any references to this product. Make sure to attach with your Estimate the Drawing or Document you are referring. (See Adding Attachments and Comment Section)

The screenshot shows the 'Elevations' tab with 'Elevation Type' set to 'Lite Cutout'. Under 'Cutout Information', 'Number of Cutouts' is 1. Under 'Cutout 1', 'Cutout Type' is 'Wood Lite Opening', 'Measurement Type Reference' is 'Cutout Size', and 'Moulding' is 'Special Profile Bead' (highlighted with a red box). A 'Custom Moulding Drawing Number' field contains 'S-BD'. Dimensions are: Width 18.000000, Height 36.000000. A note at the bottom states: 'Custom Or Non-Standard Items are subject to availability and may require additional lead time. When submitted we will make our best efforts to inform you as soon as possible if the products you have ordered are not available or to suggest you a substitute if that is the case'.

Base Options Door Face Hardware **Elevations** More

Measurement Unit: * Imperial

Elevation Type:

[Applied Moulding Information](#)

Number of Applied Mouldings: *

Applied Moulding 1:

Type: *

Custom Moulding Drawing Number: *

Custom Or Non-Standard Items are subject to availability and may require additional lead time. When submitted we will make our best efforts to inform you as soon as possible if the products you have ordered are not available or to suggest you a substitute if that is the case

Width Inch: * 🔍

Height Inch: * 🔍

Entering a Dutch Door

If you select 'Dutch' under Specialty Door Option, a new tab will appear after the Face tab. Fill out the required information to configure your door. Take note that the location of the Dutch Cut is asked from **Door Top to Dutch Cut**.

Base Options Door Face **Dutch Options** Hardware Elevations Edge / Accessories Misc Options Op

[Specialty Door Options](#)

Dutch Option: *

🔍

Shelf Material: *

Wood Species: *

Finish Dutch Shelf: *

Shelf Thickness: *

Shelf Depth: *

Shelf Side: *

Shelf Brackets: Surface

**Image from Order/Detailed Estimate. If you create a Generic Estimate – The Cut location is not asked.

Entering a Door with Transom

If your series allows it, select the Transom configuration you'd like under Transom. Select the configuration of the Transom Bottom Rail and Fill out the require information to configure your door with transom. It will ask you, your door size and your transom size separately. The size of your total opening will be calculated and printed under the size fields.

Base Options Door

Opening Number Quantity: 1

Measurement Unit: * Imperial

Series: * Aspiro | Marshfield-Algoma

Product Types * Premium Painted

Door Opening Type: * 1 Door Single Opening

Opening Options:

Transom: Single Transom - Same Opening

Transom Bottom Rail: * Square Rabbet

Door Measurements

Standard Size ? 3'-0" x 6'-8" 3'-0" x 7'-0" 3'-0" x 8'-0" 4'-0" x 7'-0" 4'-0" x 8'-0"

Door Width Feet: 3

Door Width Inches: * 0

Door Height Feet: 7

Door Height Inches: * 0

Transom Measurements

Transom Width Feet: 3

Transom Width Inches: * 0

Transom Height Feet: 2

Transom Height Inches: * 0

Opening Size Information: 3'-0" X 9'-0"

**Image from Generic Estimate. If you create a Detailed Estimate or an Order – The Prefit Width & Height will be required.

You will notice that your tabs at the top are different. This is to clearly dictate whether you are currently working in the Door Section or the Transom Section.



Bifold Doors

If you configure a Bifold Door, select 2 Door Bifold or 4 Door Bifold under Door Opening Type. Select If you want the Bifold Hardware included or not.

Measurement Unit: *	<input checked="" type="radio"/> Imperial
Series: *	Cendura Mohawk
Product Types *	Standard Painted
Door Opening Type: *	2 Door Bifold
Bifold Hardware: *	<input type="text"/> Supply & Prep by Masonite (100FD - Johnson's Hardware For Particle Core) Supply & Prep by Masonite (1825 - Johnson's Hardware For Hollow Core) Supply By Others

If the Hardware is included, Enter your Opening size and the system will calculate the proper clearance based on the Hardware selected. No need to select the Hardware, it will be defaulted and listed on your line detail.

Bifold Finished Opening Size	
Bifold Opening Width Feet:	4
Bifold Opening Width Inches: *	0
Bifold Opening Height Feet:	7
Bifold Opening Height Inches: *	0
Bifold Panel 1 Measurements	
Door Size:	1'-11 3/4" X 6'-9 1/8"
Bifold Panel 2 Measurements	
Door Size:	1'-11 3/4" X 6'-9 1/8"
Opening Size Information:	4'-0" X 7'-0"

Series: Cendura | Mohawk
 Bifold Hardware: Supply & Prep by Masonite (100FD - Johnson's Hardware | For Particle Core)
 Particleboard Non-Bonded Construction Non-Rated
 Specification Standards: WDMA
 Size: 1'-11 3/4" X 6'-9 1/8" x 1-3/4 Inch
 Face Type: Paint Grade Species
 Birch Paint Not specified; any cut (BOTH SIDES)
 Hinge Edge: Softwood (Solid/Finger Jointed) :
 Lock Edge: Softwood (Solid/Finger Jointed) :
 STILE Bevel Size = Square Edge Or No Bevel (LOCK AND HINGE)

100FD - 2 Panel Hardware Set Included Contents:

- 1 - 100 Track Length
- 1 - 1025 Panel Hanger
- 1 - 1001 Top Pivot
- 1 - 1706 Bottom Pivot
- 1 - 1010 Top Pivot Bracket
- 1 - 1011 Bottom Pivot Bracket
- 1 - 1155 Track Stops
- 3 - 1606 Panel Hinges
- 5 - 1808 Converging Panel Aligner
- 1 - 1712 Adjustment Wrench
- 1 - 34 Door Knob
- Hardware Mounting Screws

Color: Brown

CARB Phase 2 (93120)

Door Model: C-PC-NB-NR

If Hardware By Others, Enter the finish size of each panel! You can also add any Hardware preparations as such as Hinges, Flush Pull, Pivot, etc.

Series: *

Product Types *

Door Opening Type: *

Bifold Hardware: *

Bifold Panel 1 Measurements

Door Width Feet:

Door Width Inches: *

Door Height Feet:

Door Height Inches: *

Prefit Width Inches: *

Prefit Height Inches: *

Door Size: 0'-11 3/4" X 6'-11 1/8"

Bifold Panel 2 Measurements

Unequal Size:

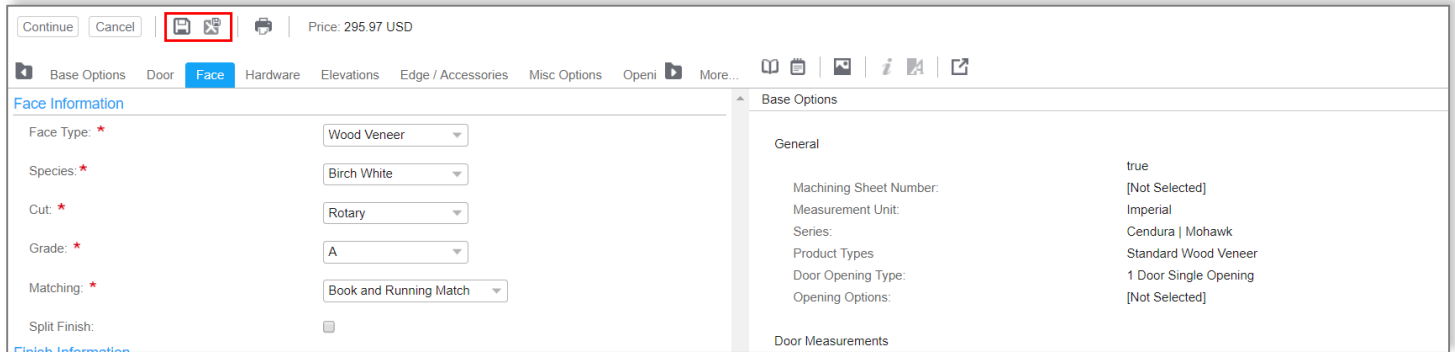
Door Size: 0'-11 3/4" X 6'-11 1/8"

Opening Size Information: 2'-0" X 7'-0"

Save Items

1. Click the **Save icon** on the top of the configuration window to save your configuration settings. You can also save and exit the line which will return you to the shopping cart.
2. The **Save and Exit** icon will save your progress and bring you back to the Shopping Cart

**** Please save often while you are in a configuration**



Copy and Edit Items

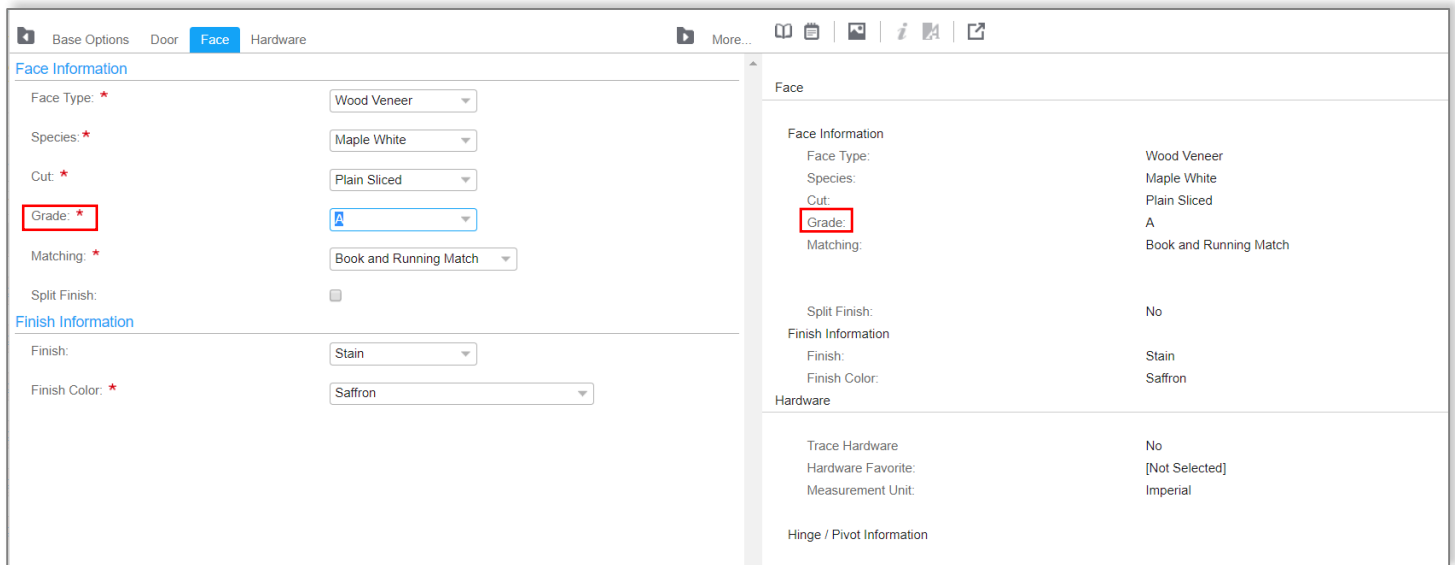
1. Click the **Copy** link to copy a Line item In the Shopping Cart

Quote Lines							Total Price: 887.91
Line	Label	Item	Qty	UOM	Price	Total	
1	Change Options More... Copy	Door 3'-0" X 7'-0" 1 Door Single Opening	1	EA	295.97	295.97	
2	Change Options More... Copy	Door 3'-0" X 7'-0" 1 Door Single Opening	1	EA	295.97	295.97	
3	Change Options More... Copy	Door 3'-0" X 7'-0" 1 Door Single Opening	1	EA	295.97	295.97	

2. To modify a Line Item, click the **Change Options** link on a Line Item to open the **Change Options** entry window

Quote Lines							Total Price: 887.91
Line	Label	Item	Qty	UOM	Price	Total	
1	Change Options More... Copy	Door 3'-0" X 7'-0" 1 Door Single Opening	1	EA	295.97	295.97	
2	Change Options More... Copy	Door 3'-0" X 7'-0" 1 Door Single Opening	1	EA	295.97	295.97	
3	Change Options More... Copy	Door 3'-0" X 7'-0" 1 Door Single Opening	1	EA	295.97	295.97	

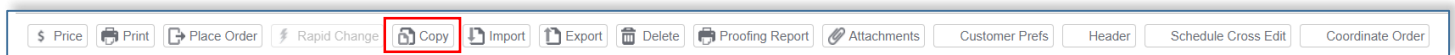
- When the Change Option entry window pops up, update the fields as required. Click the **Continue** button & check the **Check Configuration** box in the Misc. Options tab and then click the **Finish** button to save the new data and close the Change Options entry window.
- You can use the summary on the right panel to find the item you would like to change. Simply find it in the list and click it to be immediately taken to that question for changes.



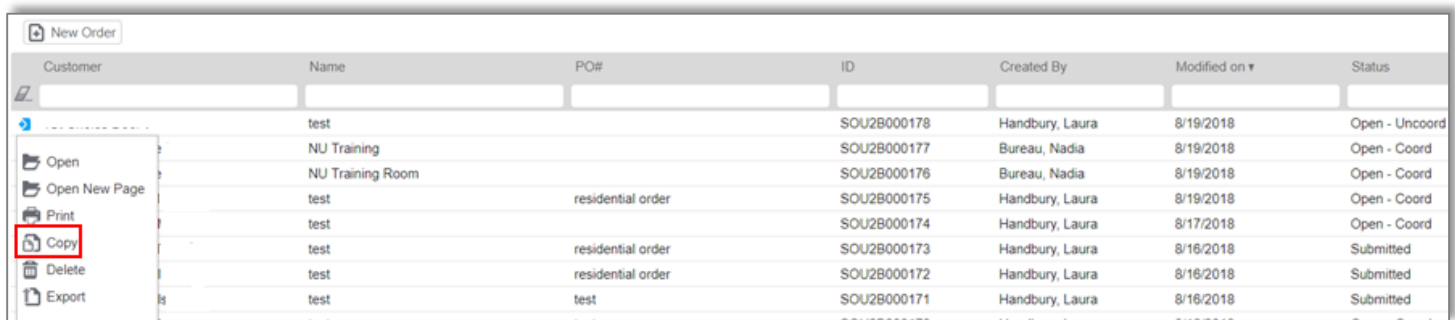
TIP: Many people find that copying complete line items and editing is faster than starting a new item. Make sure you are double checking your order if you use copy and edit often so nothing is missed or forgotten.

Copy Entire Estimates or Orders

- If you want to copy the entire Estimate or Order you can do so with the copy button on the Action Bar when you are currently in an Estimate or Order



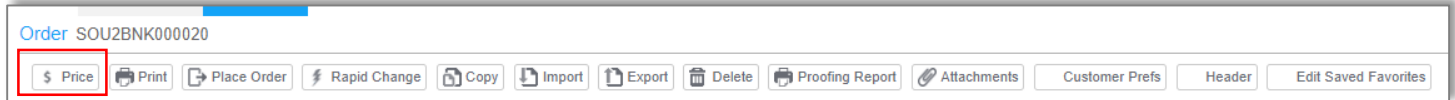
- You can also Copy Estimates or orders from the Search Grids by using the icon in the far left side of an order



Price Order

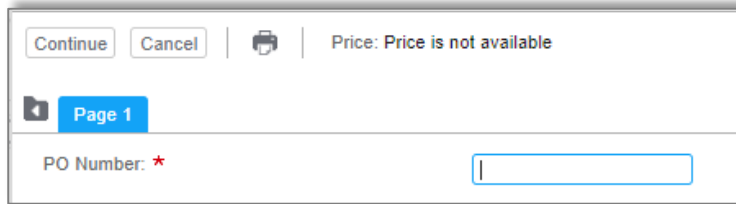
When all of your lines are complete and double checked. It is time to price your order.

1. Click the **Price** button on the Action Bar to price the order.
2. The system will then price all lines and refresh the page with your complete pricing.
3. You will get a message if there are any items on your order with pricing issues.

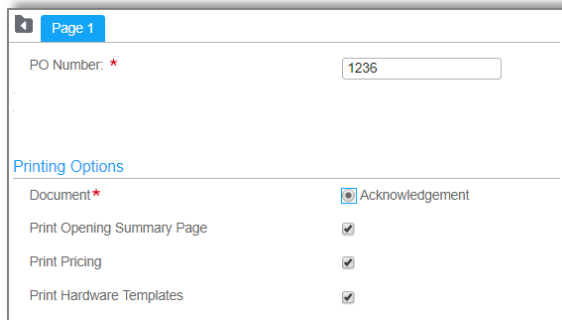


Print Order

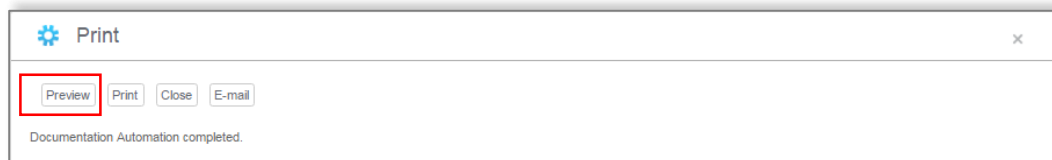
1. Click the **Print** button (next to the Price Button) to launch the print screen
2. If you did not enter the **PO Number** in your order header you must enter it now.



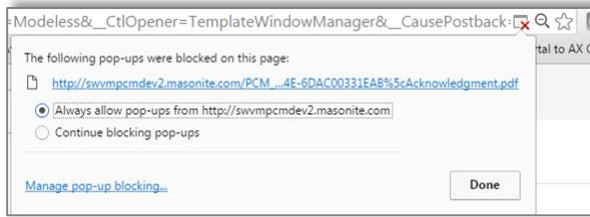
3. Click the **Finish** button to complete the process.



4. Click the **Preview** button to generate the Customer Acknowledgement file

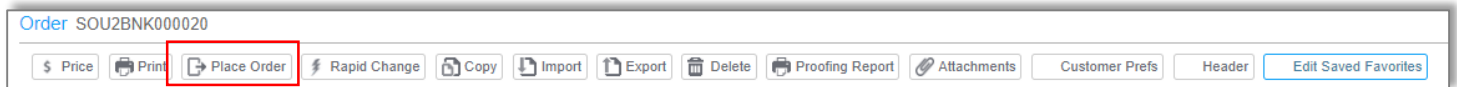


- The Configurator opens a new tab in your browser and displays the Customer Acknowledgement in a PDF format. If you don't see the new tab, you must allow Masonite pop-ups. **Check your pop-up blocker.**



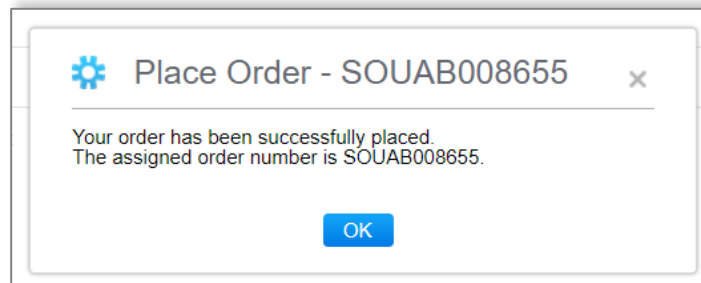
Place Order

- When you are ready to submit your order use the **Place Order** button in the top menu bar.



**** Make sure all your lines are accurate and you have entered all opening numbers.**

- You will get a notification that the submittal is successful. This means the order has successfully gone to the ERP system.



- You will be taken back to the order search screen but the status of your order will now be submitted. You may look at the order again but it will be in Read Only status.

Customer	Name	PO#	ID	Created By	Modified on *	Status	Order Status
	test	test	SOUAB008655	Handbury, Laura	8/18/2016	Submitted	Submitted

**** Note, you will have a different order number from the ERP on your confirmation and invoice and other documents. Your DoorBuilder Live Number will also appear on the documents but it will be referred to as the External Config No.**

To allow the system to coordinate an uncoordinated order, please follow the steps below:

Select Auto Coordinate in the Header

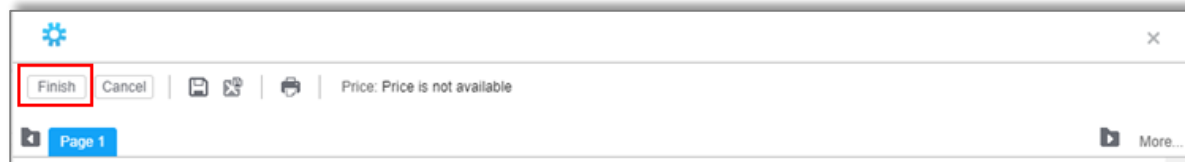
1. Start a new order and select a Customer and let the header launch
2. Start to fill out the header as you normally would for an order
3. Ensure you have selected the **Auto Coordinate** checkbox



Auto Coordinate:

Coordination Sort By* Door

4. Set a preference of how you would like your coordinated lines to appear. If you want them in order of your Door Schedule select **Door Schedule**, if you would like them in order of your hardware schedule select **Hardware schedule**.
5. When completed select the **Finish** button in the top left corner of the window.



Finish Cancel Save Print Price: Price is not available

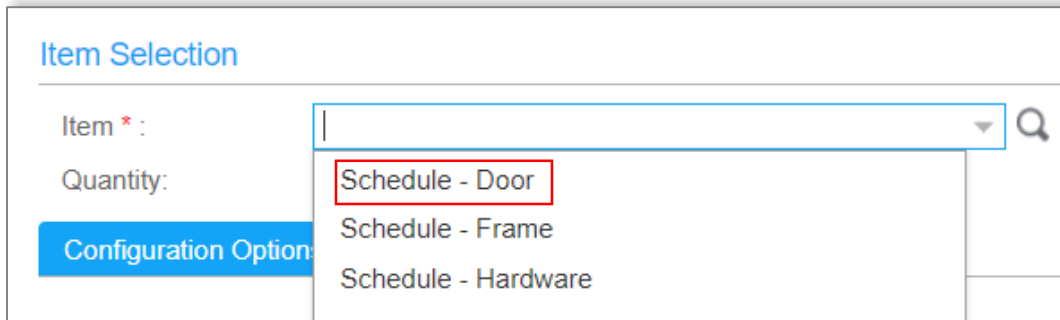
Page 1 More...

TIP: You can make changes to the job information by selecting the [Header] button.

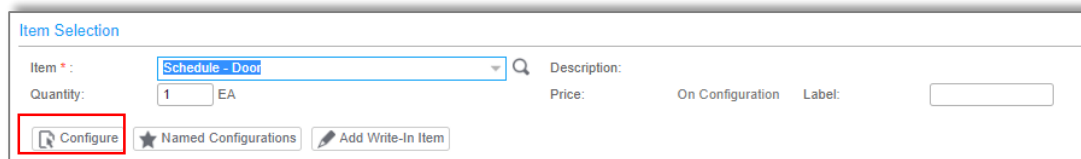
Configure a Door Schedule

After entering the Order Header, the next task in creating an Uncoordinated Order is to **start entering your schedules**.

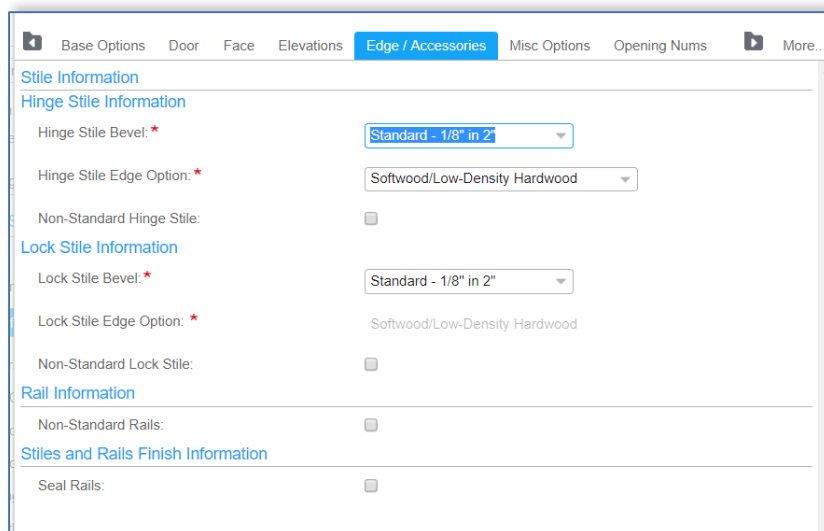
1. Select **Schedule – Door** to configure from the **Item** drop-down list



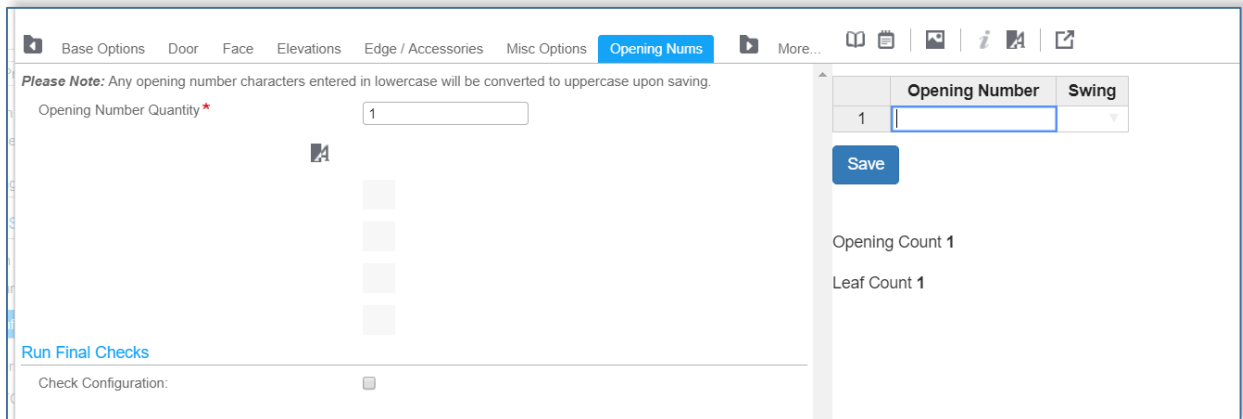
2. Select the **Configure** button to open the Configuration screen



3. Click **Configure** to open the configuration screen to the Base Options tab. You will have similar questions to answer as configuring a Door but you will notice there is no Hardware Tab on your screen.

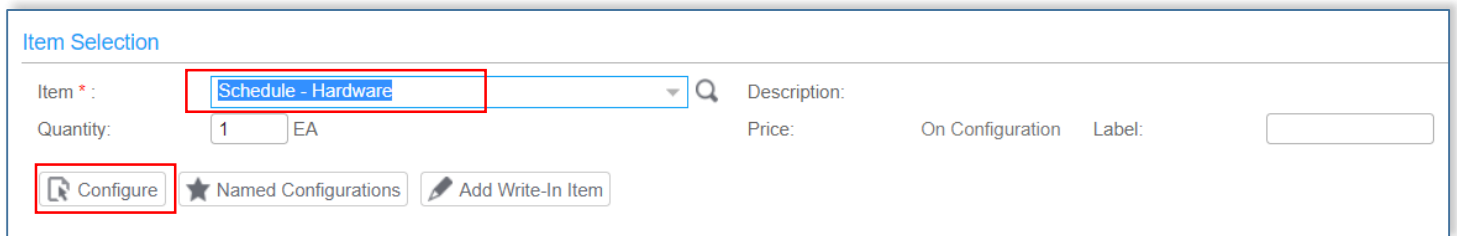


4. Click the **Opening Nums** tab or the **Continue** button to display the last tab.
 - Enter the **Opening Number Quantity**
 - Click on the icon under the field Opening Number Quantity. It will open a sheet on the right side of the configurator for you to input the Opening Number and the Swing of the door
 - Check the **Check Configuration Box**, and click **Finish**

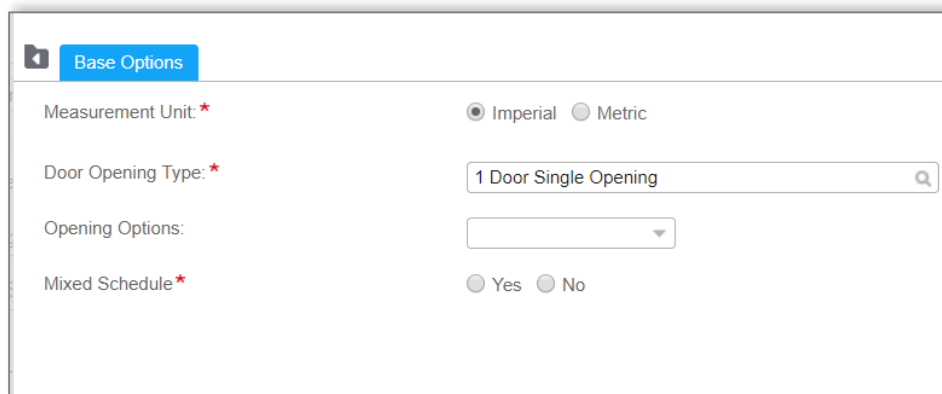


Configure a Hardware Schedule.

1. The next step would be to enter the Hardware Schedules (remember you can do these in any order). Select **Schedule - Hardware** from the **Item** dropdown.
2. Use the Configure button to launch the Configurator.



3. Enter the **Door Opening Type** and Select whether this is a mixed hardware schedule or not
 - A **Mixed hardware schedule** has multiple fire ratings, Door Widths or Door Thicknesses on the Schedule
 - In a **Non-Mixed schedule** all doors have the same Fire Rating, Door Width and Thickness.



4. Answer the **Measurement Questions**.

- Notice the Door Measurement Questions have been consolidated. Please enter the Opening Size (Opening size, It means WITHOUT the Prefits).
- You will not be asked a Door Width, Minute, or Thickness question if you are in a Mixed Schedule

Non Mixed Schedule

Base Options Hardware Opening Nums

Measurement Unit: * Imperial Metric

Door Opening Type: * 1 Door Single Opening

Opening Options: [Dropdown]

Mixed Schedule * Yes No

Door Measurements

Door Width *	03-00 00/00	Door Width Dimensions	03-00 00/00 36 1
Door Height *	07-00 00/00	Door Height Dimensions	07-00 00/00 84 1

Door Size: 36" X 84"

Door Information

Minutes: * 0

Smoke Label:

Thickness: * 1-3/4 Inch

Mixed Schedule

Base Options Hardware Opening Nums

Measurement Unit: * Imperial Metric

Door Opening Type: * 1 Door Single Opening

Opening Options: [Dropdown]

Mixed Schedule * Yes No

Door Measurements

Door Height *	07-00 00/00	Door Height Dimensions	07-00 00/00 84 .1
---------------	-------------	------------------------	-------------------

Door Information

Smoke Label:

- Click the **Hardware** tab or the **Continue** button to display the next entry fields. In an order, you must specify each piece of hardware on the door down to the Hardware Template.
 - Select the **Hinge/Pivot Hardware Type** (ie. Continuous Hinge, Hinge, or pivot), or leave it blank
 - Select the **Lock/Exit Device Type** (ie. Continuous Hinge, Hinge, or pivot), or leave it blank
 - Add any additional hardware under **Other Hardware Information**

The screenshot shows the 'Hardware' tab with the following fields:

- Trace Hardware: Yes No
- Measurement Unit: Imperial
- Hardware Set:
- Hinge / Pivot Information**
 - Hardware Type:
- Lock / Exit Device Information**
 - Lock / Exit Device Type:
- Other Hardware Information**
 - Hardware Type:

- Click the **Opening Nums** tab or the **Continue** button to display the last tab.
 - Enter the **Opening Number Quantity**
 - Click on the icon under the field Opening Number Quantity. It will open a sheet on the right side of the configurator for you to input the Opening Number and the Swing of the door.
 - If you are in a **Mixed Schedule** you must also enter the Minutes, Door Width, and Door Thickness for each door in the Hardware Schedule.

Non Mixed Schedule

The screenshot shows the 'Opening Nums' tab with the following fields and a table:

- Please Note: Any opening number characters entered in lowercase will be converted to uppercase upon saving.
- Opening Number Quantity:
- Run Final Checks:
- Check Configuration:

Opening Number	Swing
1	<input type="text"/>

Buttons: Save

Summary: Opening Count 1, Leaf Count 1

Mixed Schedule

The screenshot shows the 'Opening Nums' tab with the following fields and a table:

- Continue | Cancel | Price: Price is not available
- Please Note: Any opening number characters entered in lowercase will be converted to uppercase upon saving.
- Opening Number Quantity:
- Run Final Checks:
- Check Configuration:

Opening Number	Swing	Minutes	Width	Thickness	
1	101	LH	0	03-00	1.375

Buttons: Save

Summary: Opening Count 1, Leaf Count 1

Configuring a Frame Schedule – Optional

If you have a frame schedule, you can also configure this in the system.

1. Select **Schedule - Frame** from the Item dropdown.
2. Use the **Configure** button to launch the Configurator.

Item Selection

Item * : Description:

Quantity: EA Price: On Configuration Label:

3. Enter the Door Opening Type and select whether this is a Mixed Frame Schedule or not
 - A **Mixed Frame Schedule** has multiple fire ratings, Door Widths or Door Thicknesses on the Schedule
 - In a **Non-Mixed Schedule** all doors have the same Fire Rating, Door Width and Thickness.

Base Options

Measurement Unit * Imperial Metric

Door Opening Type *

Opening Options:

Mixed Schedule * Yes No

4. Answer the **Measurement Questions**.
 - Notice the Door Measurement Questions have been consolidated. Please enter the entire Prefit Door Size in one box (opening size minus the prefit).
 - You will not be asked a Door Width, Minute, or Thickness question if you are in a Mixed Schedule yet.

Door Measurements

Door Width * Door Width Dimensions 03-00 00/00|36|.1

Door Height * Door Height Dimensions 07-00 00/00|84|.1

Door Size: 36" X 84"

5. Click the **Opening Nums** tab or the **Continue** button to display the last tab.
 - Enter the **Opening Number Quantity**
 - Click on the icon under the field Opening Number Quantity. It will open a sheet on the right side of the configurator for you to input the Opening Number and the Swing of the door.
 - If you are in a **Mixed Schedule** you must also enter the Minutes, Door Width, and Door Thickness for each door in the Frame Schedule.

Non-Mixed Schedule

Base Options **Opening Nums** More...

Please Note: Any opening number characters entered in lowercase will be converted to uppercase upon saving.

Opening Number Quantity *

	Opening Number	Swing
1	<input type="text" value="1"/>	<input type="text"/>

Save

Opening Count 1
Leaf Count 1

Mixed Schedule

Continue Cancel Price: Price is not available

Base Options Hardware **Opening Nums** More...

Please Note: Any opening number characters entered in lowercase will be converted to uppercase upon saving.

Opening Number Quantity *

	Opening Number	Swing	Minutes	Width	Thickness
1	101	LH	0	03-00	1.375

Save

Opening Count 1
Leaf Count 1

[Run Final Checks](#)

Check Configuration:

Validating the Schedules

When you have completed all the schedules on your order you can use the schedule cross edit button on the top bar to validate the order before you coordinate. This feature will check that all Door Numbers, Swings, Sizes and Fire Ratings match among the schedules on the order.

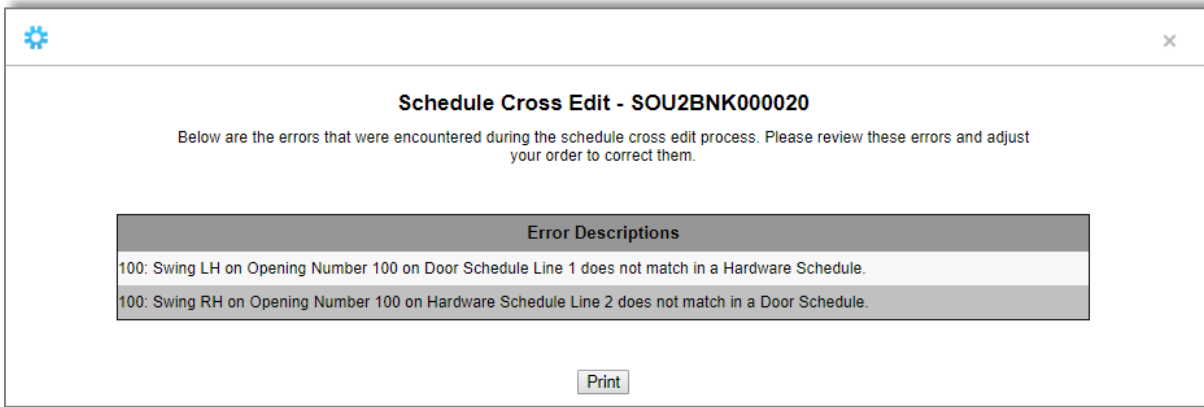
- This will also check for advanced features like lite/lock conflicts.
- Any errors will appear on the screen in a format that you can print.

1. Use the **Schedule Cross Edit** Button on the Action Bar to Validate the Order.

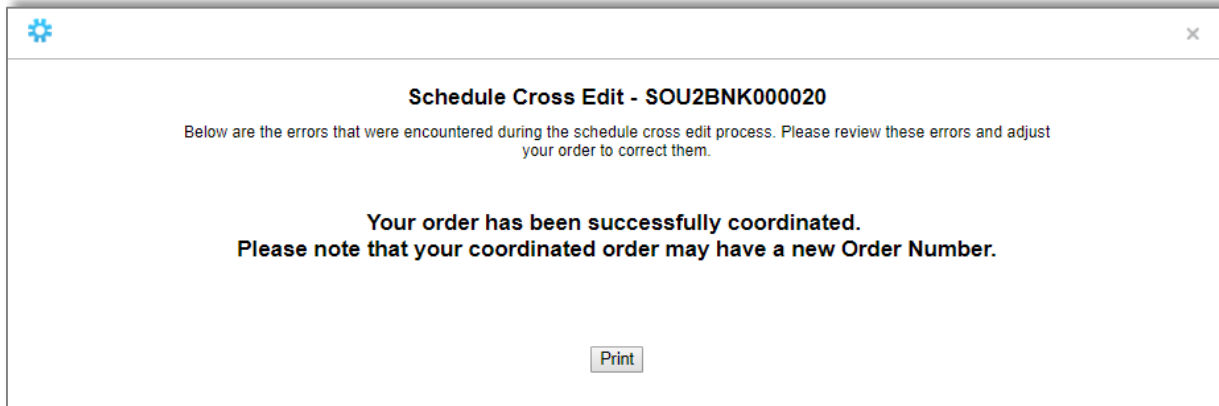
Order SOU2BNK000020

\$ Price Customer Prefs Header **Schedule Cross Edit**

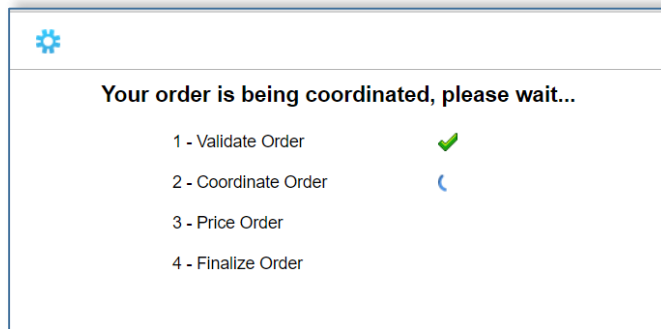
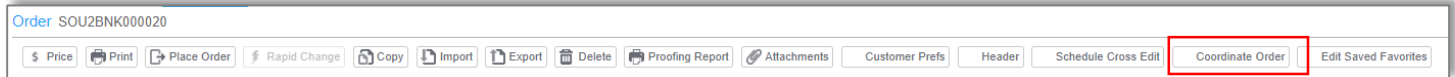
2. If the system cannot match up all the schedules, you will get a list of errors like below



3. If you don't have errors, you will get a message that says the order is able to successfully coordinate



4. When you are ready for the system to actually coordinate the order, you will use the **Coordinate Order** button on the top bar.



- When the coordination process is successful, you will be taken to a brand new order (**note the new order number) that has coordinated Door lines instead of Schedules.

The screenshot shows the DOORBUILDER software interface. At the top, there are navigation tabs: Home, Estimates, Orders (selected), Customers, and Account Information. Below this, the order ID 'SOU2BNK000021' is displayed. A toolbar contains various actions like Price, Print, Place Order, Rapid Change, Copy, Import, Export, Delete, Proofing Report, Attachments, Customer Prefs, Header, and Edit Saved Favorites. The 'Order Name' field is set to 'TRAINING 2'. Below the toolbar, there are sections for 'Item Selection' and 'Order Lines'. The 'Order Lines' section shows a table with one line item:

Line	Label	Item	Qty	UOM	Price	Total
1		Door 3'-0" X 7'-0" 1 Door Single Opening	1	EA	0.00	0.00

- You can now finish out the coordinated order by **Printing** and **Placing Order** (You cannot Place an Uncoordinated Order)
- In the Search Grid you are able to access either the Coordinated order or the Uncoordinated order (Note the status will be **Open – Coord** or **Open – Uncoord**)

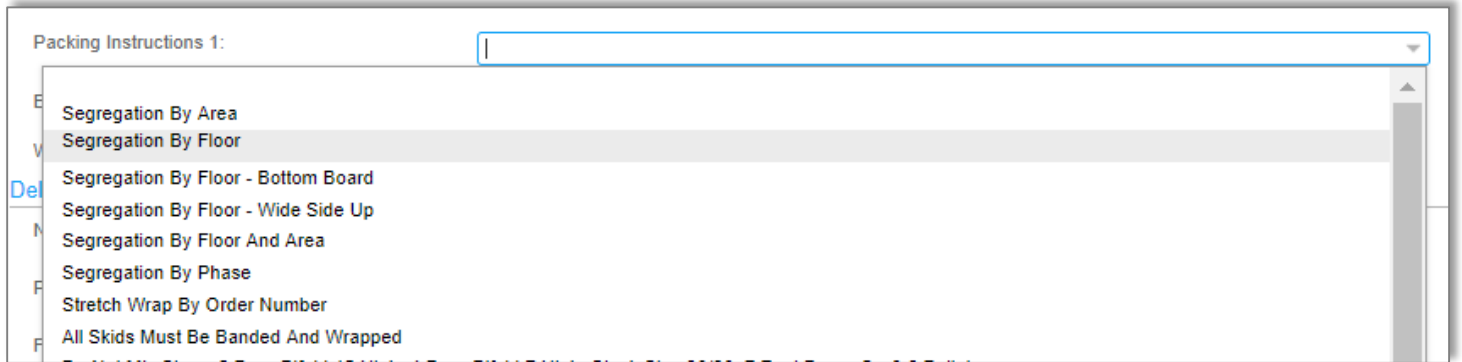
The screenshot shows the 'Order Search' section of the DOORBUILDER software. It features a table with the following columns: Customer, Name, PO#, ID, Created By, Modified on, and Status. The table contains two rows of data:

Customer	Name	PO#	ID	Created By	Modified on	Status
	TRAINING 2	12369	SOU2BNK000021	Admin, Admin	8/24/2018	Open - Coord
	TRAINING 2	12369	SOU2BNK000020	Admin, Admin	8/24/2018	Open - Uncoord

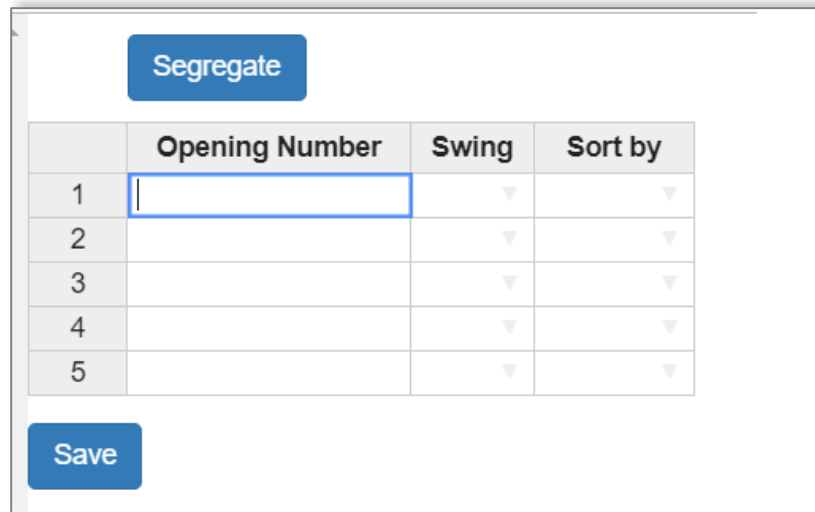
The 'Status' column for the second row is highlighted with a red box.

Adding Segregation by Floor to your order

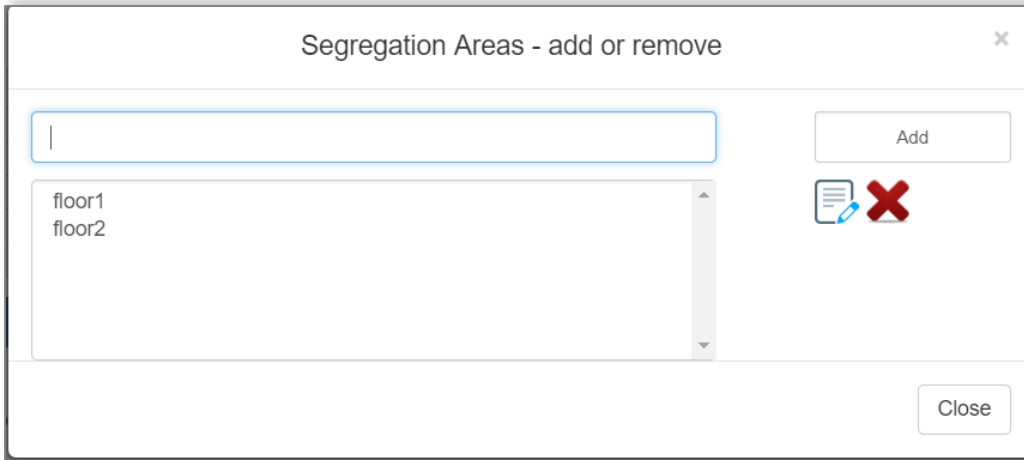
1. If you would like your order to be segregated by Floor, select the appropriate **Packaging Instructions** in the Header Screen.



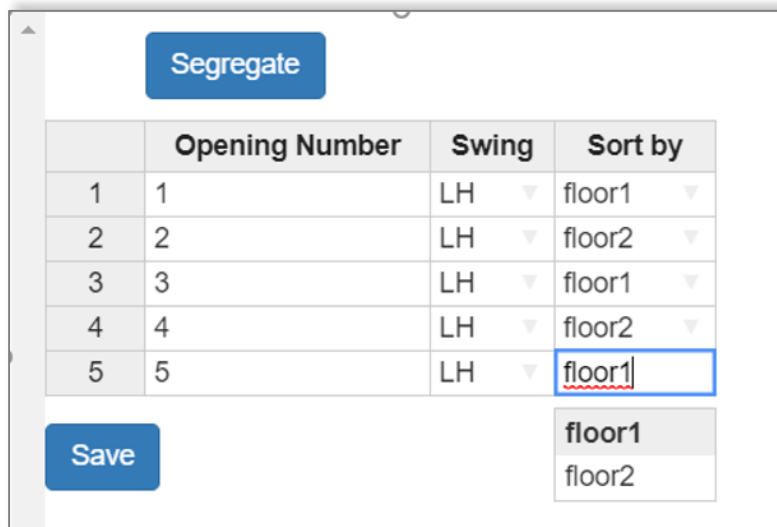
2. When you configure your line and go to the Opening Number Table you will see an Extra **Sort by** column and **Segregate** Button.



3. Use the **Segregate** Button to define the segregation areas for your order.
 - Enter the Area in the box and use **Enter** or **Add** to add them to your Sort by list. You can also **Edit** or **Remove** options
 - You will have the ability in Each Line to modify, add or remove sort by areas so don't worry if you forget one!



4. Once you have defined the Sort By Areas use the **Close** button and go back to your opening number table.
 - You will now have all of your sort by areas available to you in the sort by column.
 - Each opening number must be assigned a **Sort By Area**



5. The **Sort By** Areas will be able to be viewed in the Opening Page on the Order Acknowledgement

Job Name: test Order No: SOTSB006873

OPENINGS											
OPENING	ITEM	SWING	SORT	OPENING	ITEM	SWING	SORT	OPENING	ITEM	SWING	SORT
1	1	LH	floor1								
3	1	LH	floor1								
5	1	LH	floor1								
2	1	LH	floor2								
4	1	LH	floor2								

There are several different types of errors and messages in the system that you will want to be familiar with.

Informational Messages

These can either be messages written on the screen or in the form of popups. These are things that you should know about your specific configuration but there is no required action on your part.

Some examples of Informational messages in the system:

- Species Note
- Blocking Informations
- Recommended Prefits
- Hardware Recommendations
- Species/Stain combination recommendations

Species: *

Take note that the Figure Characteristic of this Anegre is Plain. Select Custom Wood Veneer for more Option.

Bottom Rail (Height | Blocking):

Take note that the Hardware selected will automatically pull behind the scene a Bottom Rail (Height | Blocking) of 3-3/4 Inch SCL.

Prefit Width Inches: *

*Unless if a Continuous Hinge is used, Masonite Architectural strongly suggests using 3/16" Prefit Width for Pair Configuration.

Blocking Information

Top Rail Blocking:

Bottom Rail Blocking:

Lock Block / Center Block:

Blocking is not required for PC 45. Remove blocking to access PC 45 construction.

Hinge / Pivot Information

Copy Previous Hinge/Pivot:

Hardware Type:

Active door has Hinges and inactive door has No Hinges. Please ensure this is correct.

Species: *

Cut: *

Grade: *

Matching: *

Pair Match:

Finish

Split Finish:

Finish Information

Finish:

Finish Color: *

You have selected a veneer face or finish color that is outside our standard stock sample offering. Please advise your inside sales contact if finish samples are required for project approval.

The check configuration button on the last tab will also run through your configuration and list out all the necessary informational messages about your configuration.

Estimate

Run Final Checks

Check Configuration:



Door1 Warning Messages

Note that your elevation(s) may have a potential lite/lock conflict, but we are unable to calculate distances for estimates. We may ask you to reduce the lite size or modify the location at the order time.

Door1 Warranty Violations

To warranty the selected core/thickness, cutouts can't exceed 40% of the door's total area (2980.65625 sq. in.). Selected lites and louvers requires cutouts totalling 1320 sq. in. which is 44.3% of the door's total area.

For a warranty, the maximum length for a cutout is 54", selected lite requires a cutout with a length of 60". As suggestion to allow taller cutout options, you may also like to change your core to an SCLC or EHD Core.

Order

Run Final Checks

Check Configuration:



Door2 Informational Messages

A lock was selected on the active door with no strike on the inactive door. Please ensure this is correct.

A piece of Hardware has been selected on the active door but the inactive leaf has no hardware prep. Please ensure this is correct.

Further Processing stamp will require a Fire Door label to be installed by the customer. Please confirm with your company's labeling agency that you are an authorized secondary machiner under Masonite Architectural Fire listings to apply the Fire Door label.

Door2 Warning Messages

You have an Applied Moulding on your Door #1 but not on your Door #2, Please make sure that is correct.

Informational Messages that print at the line level

There are messages that are important because that may affect the warranty or related for field installation. Those messages will print at the line level at each affected configuration.

Door 1 [Line Details](#)

3'-0" X 7'-0" 1 Door Single Opening

Line Item:1
Series: Aspiro | Marshfield-Algoma
Particleboard Non-Rated
Specification Standards: WDMA
Door Thickness: 1-3/4 Inch
Nominal Door Size: 36" X 84"
Face Type: Paint Grade Species
MDO (BOTH SIDES)
Hinge Edge: Hardwood Manufacturer's Choice : MapleSelectWhite
Lock Edge: Hardwood Manufacturer's Choice : MapleSelectWhite
STILE Bevel Size = Standard - 1/8" in 2" (LOCK AND HINGE)

Exit Device: CVR VON DUPRIN 99/9847 CVR

Wood Lite Opening Beveled Bead
Cutout Size = 24 x 60
Maple White Finish Moulding; Matching Face
Glass Thk: 1/4 Inch Glass = Supplied By Others


Note that your elevation(s) may have a potential lite/lock conflict, but we are unable to calculate distances for estimates. We may ask you to reduce the lite size or modify the location at the order time.

CARB Phase 2 (93120)
NO WARRANTY ON THIS DOOR
To warranty the selected core/thickness, cutouts can't exceed 40% of the door's total area (2985.867188 sq. in.). Selected lites and louvers requires cutouts totalling 1440 sq. in. which is 48.2% of the door's total area.
For a warranty, the maximum length for a cutout is 54", selected lite requires a cutout with a length of 60". As suggestion to allow taller cutout options, you may also like to change your core to an SCLC or EHD Core.

Door Model: A-PC-B-NR

Informational Messages that print at the Header level

There are messages that the person who creates the Estimate or Order will read on the screen but that are important to recall on the Estimate confirmation Or Order Acknowledgement. Those messages will print at the Header level when the Estimation confirmation Or Order Acknowledgment be printed.

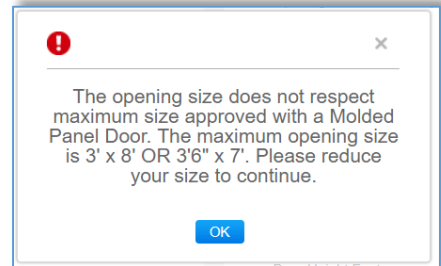
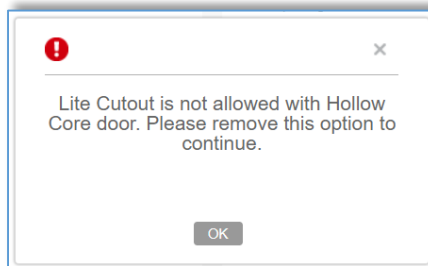
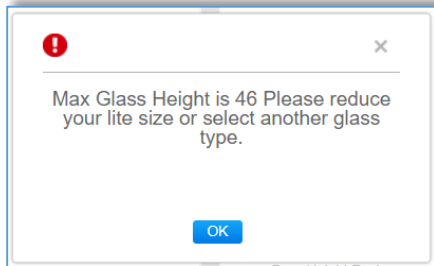
		
Customer Estimate		Created By: Bureau, Nadia
SOLD TO	SHIP TO	ESTIMATE INFO
Name: .. Address: United States Customer No: .. Job Name: test Contact Info: Name: mike Email: mike@lpo.com	Name: .. Address: United States Freight Terms: FOB Origin (Outbound) Transport Mode: LTL	Estimate Date: 8/19/2018 Estimate No: SQB001938_1 ISR Name: Hanson, Sarah TSM Name: Snell, John Payment Terms: Net 30 days Job Total Qty: 1 Job Ext Price: \$200.00 Ship Weight: 197.7 Approximate Project Delivery Date: 08/21/2018
Header Comments: CUSTOMER CONTACT: mike .. / EMAIL mike@lpo.com		
Estimate Additional Notes & Disclaimers: Prices are firm for shipment through 05/20/2019 if we receive a formal purchase order or letter of intent within 60 days from the date of this quote. For shipment after 05/20/2019 and before 02/20/2020 add 3% per quarter to prices. The High Impact Edgeband's color name may be similar to the High Impact Face's color name, but the color is a compatible match only. The manufacturing process of both components are different and the color cannot be identical.		

Critical Messages

If you receive a critical message or pop-up in the system it means that you have done something that requires you to take action on to complete your configuration. You will be stopped and unable to continue your configuration until you fix the issue.

Examples of critical messages in the system:

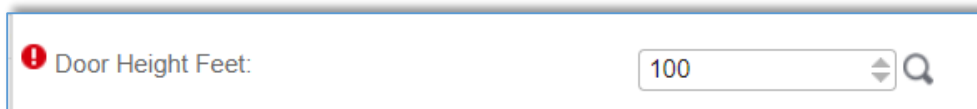
- Glass Size Errors
- Incorrect Door Configurations
- Size Warnings



Numeric field errors

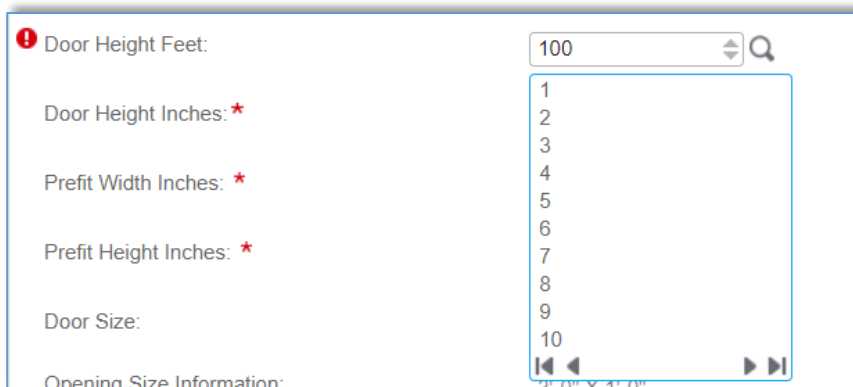
Numeric Fields are designed to let you enter numbers quickly but not put in an incorrect value.

If you put in an incorrect value, you will see a red exclamation mark next to the question.



You can try again, or use the up and down errors to have the system take you to the closest acceptable value.

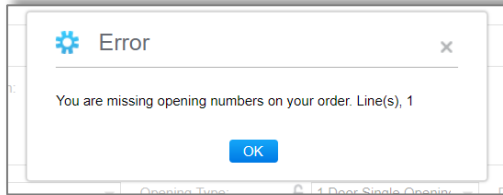
You can also use the magnifying glass to see the list of acceptable values for the field.



Estimate Conversion/Place Order errors

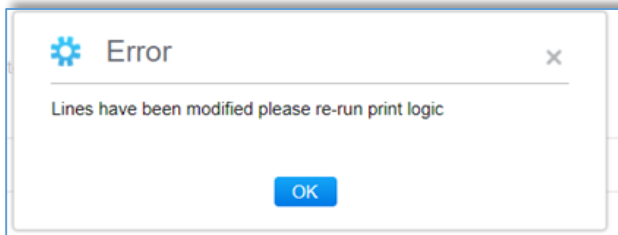
You will not be able to convert your estimate or Submit your Order in the following scenarios

- You have not Priced the Estimate / Order
- You have not Printed the Estimate/Order
- There are any lines with Pricing Issues
- You have not completed all Opening numbers/Swings (Order only)



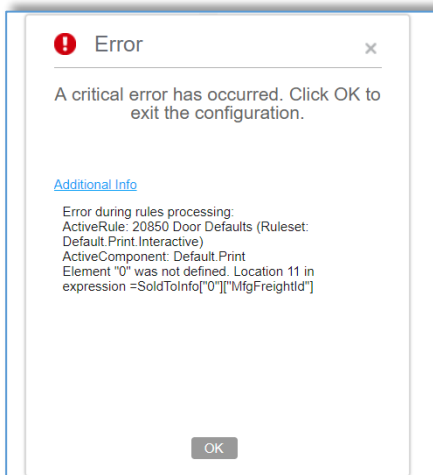
- There is Custom product on the Estimate/ Order and you need Internal Assistance

If you forget to do any of the above, you will receive an error when you try to use the 'Place Order' button



Critical Errors

Though we hope you do not, you may encounter a Critical Error in the system. This means that the developers must fix something in the rules engine. If you encounter this error please hit the 'additional details' button and take a screen shot and reference your order number and line number and submit to DoorBuilder@masonite.com



There are many tools in Door Builder to help speed up the Estimating and Ordering Process. We have outlined a few of them here:

Saving Favorites

You can save Hardware and Elevation configurations to be used in multiple lines of an Estimate/order or in different Estimates or Orders.

1. When you are in a configuration, complete the Hardware or Elevation Tab and select **Save Favorite** and give the configuration a name.

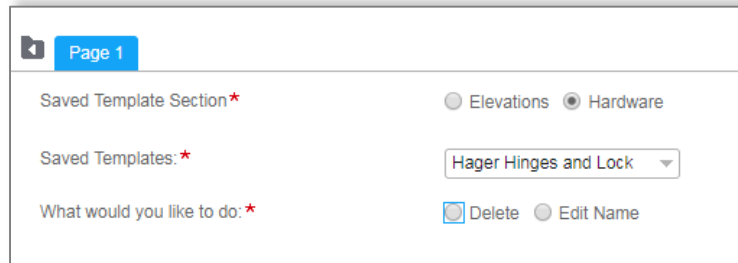
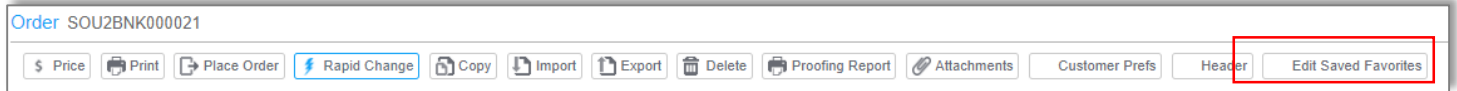
The screenshot shows a configuration window with two sections: 'Frame Information' and 'Location Information'. Under 'Frame Information', 'Frame Type' is 'Standard', 'Frame Manufacturer' is 'Ceco', and 'Frame Height' is '84'. Under 'Location Information', 'Hinge Location 1' is '6.625000', 'Hinge Location 2' is '39.625000', 'Hinge Location 3' is '72.625000', 'Hinge Backset' is '0.25000', and 'Interconnected Location 1 (Top to Centerline of Lock Front)' is '42.062500'. At the bottom, the 'Save Favorite' checkbox is checked, and the 'Favorite Name' is '1279 Hinges and S210 L'. A red box highlights the 'Save Favorite' and 'Favorite Name' fields.

2. You may now reuse this Hardware or Elevation configuration in any line on this Estimate/Order or any other Estimate/Order. It will be saved only for your user.
3. When you are in your next Line, select the Favorite Name at the top and all of the information will default for you.

The screenshot shows a configuration window with 'Hardware Favorite' set to '1279 hinges and a lock' and 'Measurement Unit' set to 'Imperial'. The 'Hinge / Pivot Information' section includes: 'Hardware Type' is 'Hinge', 'Total Number of Hinges on Frame' is '3', 'Sub Category' is 'Standard', 'Hinge Height' is '4.5', 'Hardware Part Number' is '1279', 'Hardware Manufacturer' is 'HAGER', 'Hardware Template' is 'T311 REV.96, Length: 4 1/2, Gauge: 0.134', 'Hinge Gauge' is '0.134', and 'Hinge Quantity' is '3'.

****Tip - You can also use the Saved Favorites with Rapids.**

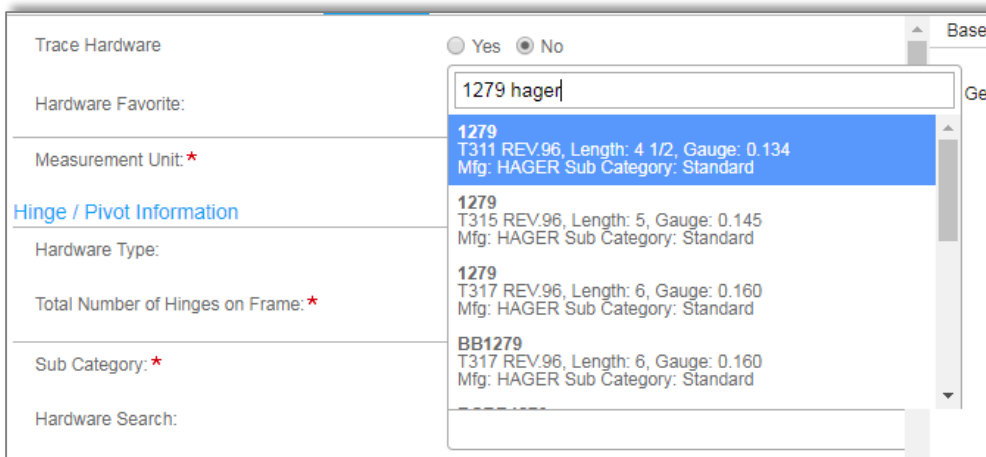
- You can use the **Edit Saved Templates** Button on the Action Bar to Delete or Edit the Name of your saved favorites



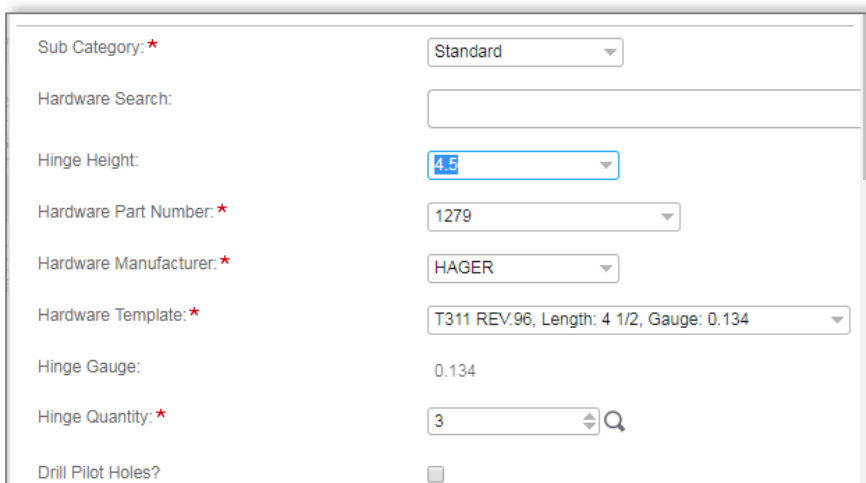
Hardware Search

When you are in an Order or Detailed Estimate, use the Hardware Search to get to the correct templates faster.

- On the Hardware Tab, you will see a Hardware Search prompt for every hardware type.
- Start typing information about the piece of Hardware to navigate to the template
 - You can search by Manufacturer, Part Number or any template information.
 - Type multiple pieces of information to get to the right template



- Make your selection and all the template information will fill in for you.



Hot Keys

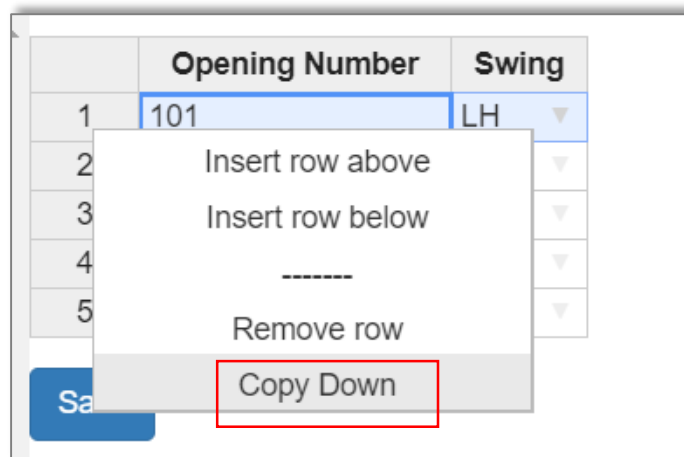
You can navigate through Door Builder using your mouse or your keyboard, whichever you prefer! These tips will help you use your keyboard for navigation.

- Move from Question to Question by using the **Tab** Key
- Start typing an option and use the up and down arrows to highlight the correct option
- Select the correct option with the **Enter** Key
- To Check a checkbox, use the **Space Bar**
- Number Fields can take a decimal or a fraction value. No need to convert!
- Open the Hardware Search with the **Space Bar** to start typing.
- **Ctrl + x** = Exit configuration
- **Alt + Ctrl + Left Arrow** = Go back to First tab
- **Alt + Ctrl + Right Arrow** = Go to Last tab
- **Alt + Ctrl + p** = Print your screen
- **Ctrl + s** = Save your progress
- **Alt + Ctrl + s** = Save and Exit the Line
- **f2** = Hit the Continue Button
- **Right mouse click** = Hit the Continue Button

Opening Number Table Functionality

When entering your opening numbers there are some tricks that will help your experience go faster.

- You can navigate into the opening number table with the **Tab** key and Navigate through the cells with **Tab** (to go left to right) or **Enter** (To go up and Down)
- **Right Click** on a Row to add or remove rows to the table (changing your line quantity)
- Use **Copy Down** and the system will Fill in your opening numbers for you sequentially and copy your swings to the end of the table.



You can use the copy down feature on individual cells as well. If you had a door with 50 LH and 50 RH Doors you could

- 1) Populate LH in Row 1 and Copy Down
- 2) Go down to Row 51 and switch to RH and copy down from there.

The screenshot shows a table with the following data:

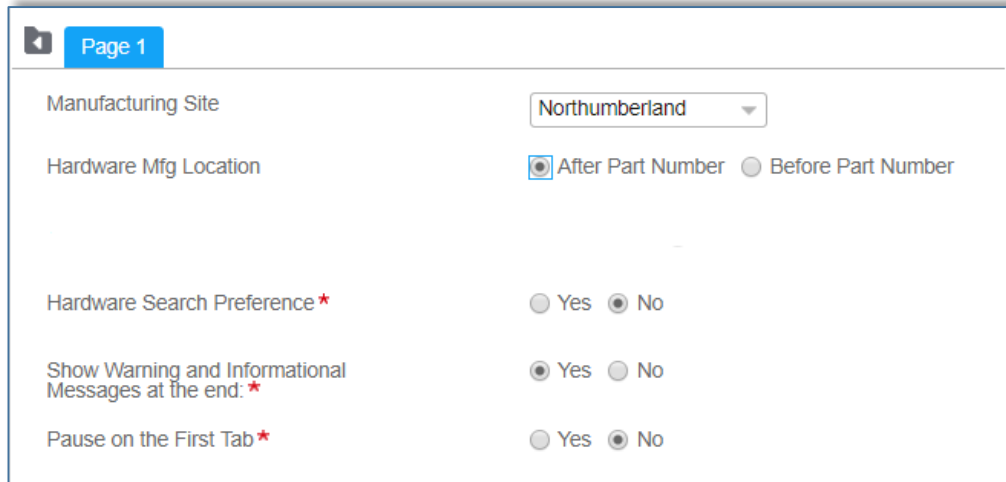
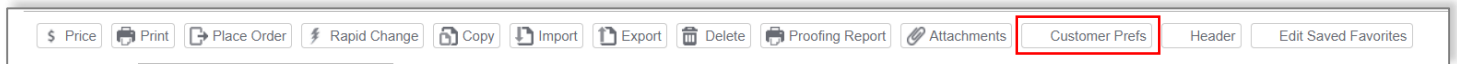
	Opening Number	Swing
40	40	LH
47	47	LH
48	48	LH
49	49	LH
50	50	LH
51	51	RH
52	52	RH
53	53	RH
54	54	RH
55	55	RH
56	56	RH
57	57	RH
58	58	RH
59	59	RH
60	60	RH
61	61	RH
62	62	RH
63	63	RH
64	64	RH
65	65	RH

A context menu is open over row 51, showing options: 'Insert row above', 'Insert row below', '-----', 'Remove row', and 'Copy Down'. The 'Copy Down' option is highlighted with a red box.

Customer Preferences

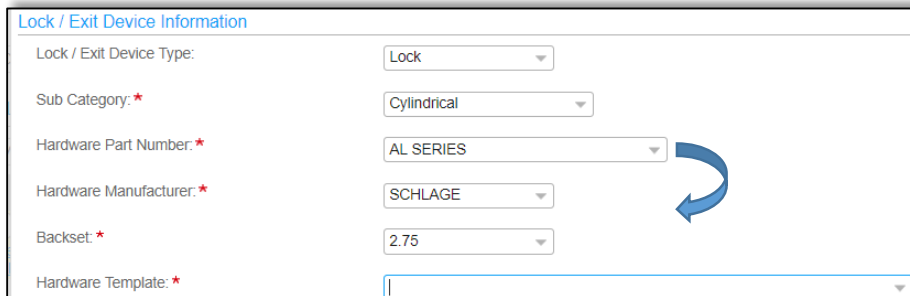
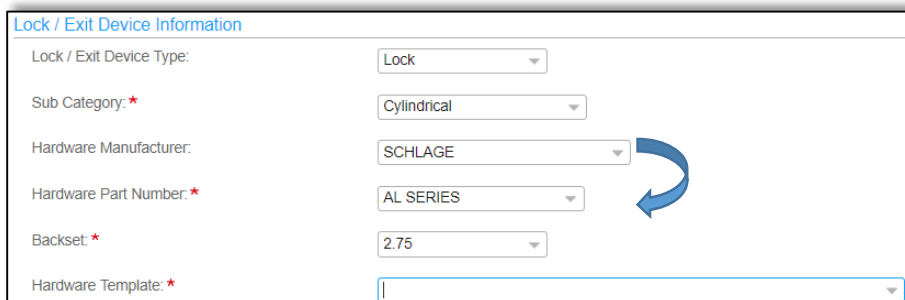
The Customer Preferences will help you set certain values just for you that can help speed up the entry process.

1. Click the **Customer Prefs** button on the Action Bar.

A screenshot of the 'Customer Preferences' dialog box. It has a 'Page 1' tab at the top left. The settings are as follows:

- Manufacturing Site: Northumberland (dropdown)
- Hardware Mfg Location: After Part Number Before Part Number
- Hardware Search Preference*: Yes No
- Show Warning and Informational Messages at the end*: Yes No
- Pause on the First Tab*: Yes No

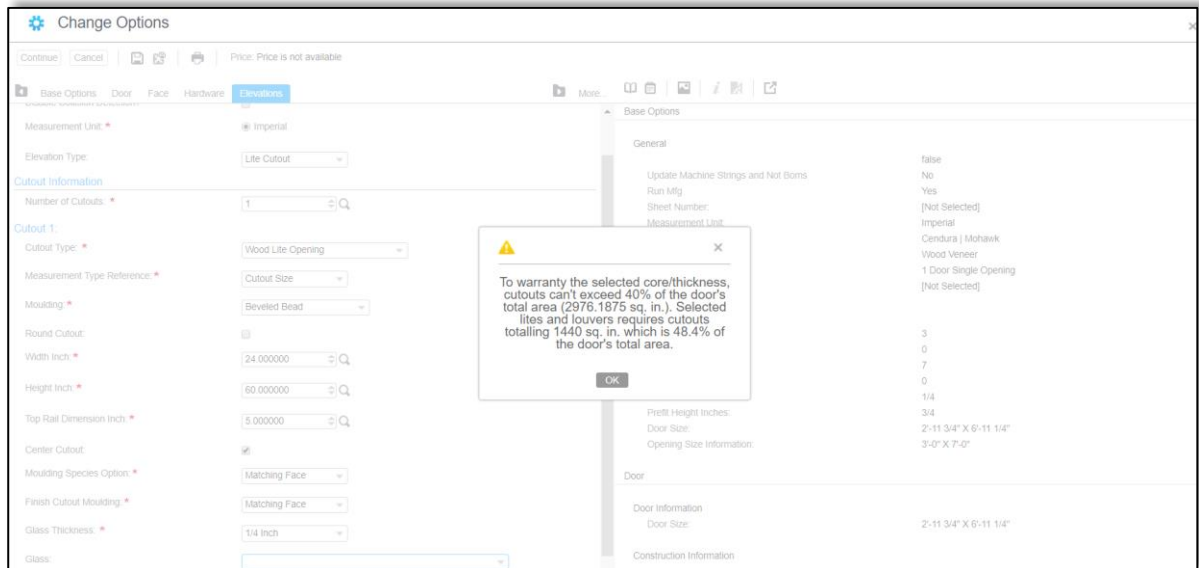
2. Set the values that you would like to be saved for your user account
 - **Manufacturing Site** : It sets the Manufacturing site default in the header
 - **Hardware Mfg Location**: For Detailed Estimate Or Order, It shows the Hardware Manufacturer before or after the Hardware Part Number.

A screenshot of the 'Lock / Exit Device Information' form. The fields are: Lock / Exit Device Type: Lock; Sub Category*: Cylindrical; Hardware Part Number*: AL SERIES; Hardware Manufacturer*: SCHLAGE; Backset*: 2.75; Hardware Template*: (empty). A blue curved arrow points from the Hardware Part Number field to the Hardware Manufacturer field.A screenshot of the 'Lock / Exit Device Information' form. The fields are: Lock / Exit Device Type: Lock; Sub Category*: Cylindrical; Hardware Manufacturer*: SCHLAGE; Hardware Part Number*: AL SERIES; Backset*: 2.75; Hardware Template*: (empty). A blue curved arrow points from the Hardware Manufacturer field to the Hardware Part Number field.

- **Hardware Search Preference**: It allows you to activate or deactivate this tool.

- Show Warning & Informational Message at the End: If you prefer getting warning and informational messages in real time vs at the end of the configuration use the **Show Warning and Informational Messages at the End** question.

If you select No

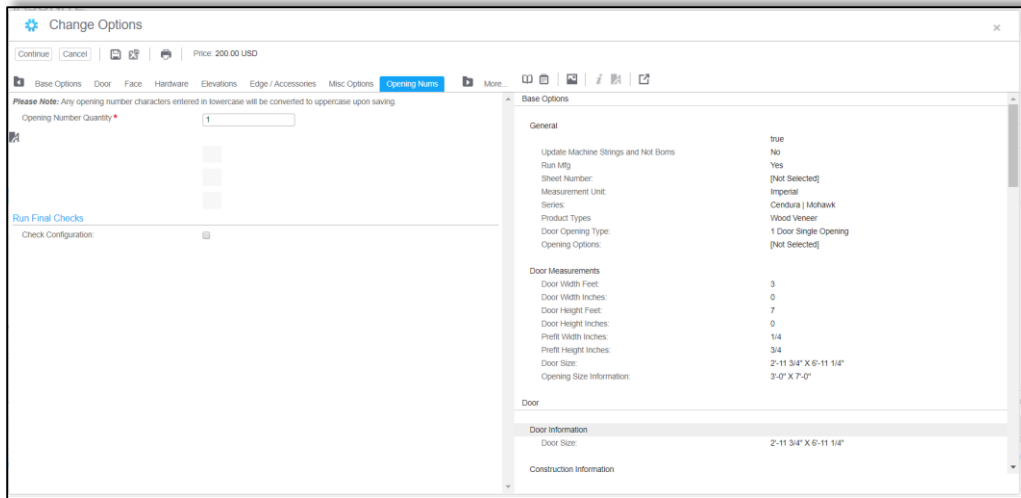


If you select Yes

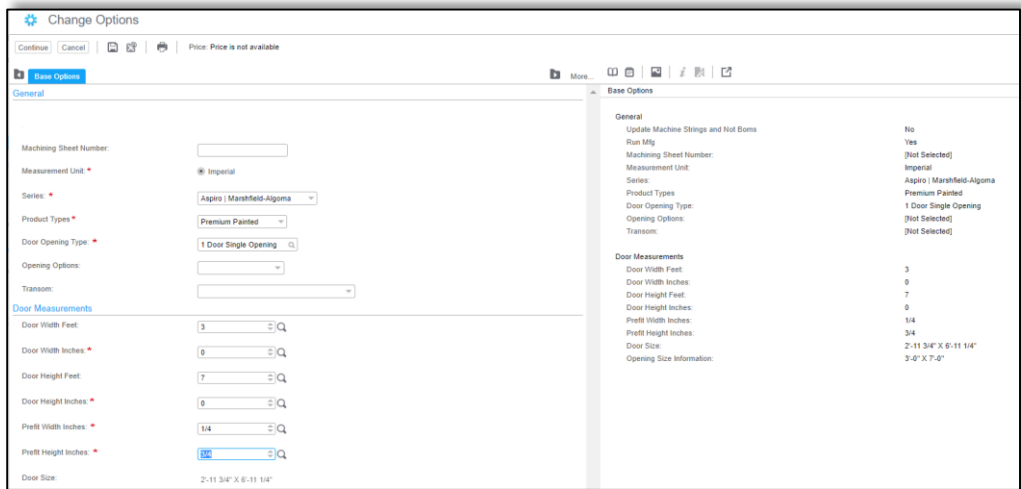


- We suggest you have the **Pause at the First Tab** selected as this will let you copy and change size easily without hitting any system messages. If you have this selected, once you finish changing the sizing or information on the first tab, you must hit the **Continue** button to advance in the configuration.

If you select No



If you select Yes



Expand Or Collapse line(s)

To Expand or Collapse Multiple lines to read the line detail, Click Expand Or Collapse All Function next to Validate All.

To Expand Or Collapse one specific line, Click Line Details



Merging Lines

The Merging function will help you to decide if you want identical configurations to consolidate together or not.

1. If you have identical configurations and *you do not want the lines to merge together* for specific reason, fill out the Line Item (Estimate) Or Machining Sheet (Order) field with a different information. By having a different Sheet Number, line Number, etc. in this field, the system will not merge identical lines. The merging process happens in the system when you print the acknowledgement. Using this feature will keep the lines separated even if they are identical after the printing process.

The screenshot shows the 'Base Options' dialog box for a machining sheet. The 'Machining Sheet Number' field contains the value '1'. The 'Measurement Unit' is set to 'Imperial' and the 'Series' is 'Cendura | Mohawk'. The dialog box has 'Continue' and 'Cancel' buttons at the top left and a 'Price: Price is not available' message at the top right.

The screenshot shows the 'Base Options' dialog box for a machining sheet. The 'Machining Sheet Number' field contains the value '2'. The 'Measurement Unit' is set to 'Imperial' and the 'Series' is 'Cendura | Mohawk'. The dialog box has 'Continue' and 'Cancel' buttons at the top left and a 'Price: Price is not available' message at the top right.

The line Item is different between each line but the configuration is identical.

When you print, the lines do not merge.

Line	Label	Item	Qty	UCM	Price	Total
1		Door 2'-6" X 7'-0" 1 Door Single Opening	3	EA	211.78	635.35
2		Door 2'-6" X 7'-0" 1 Door Single Opening	3	EA	211.78	635.35

- If you would like identical lines consolidated on your Estimate or Order, enter the same reference on the identical lines you want to combine and the lines will merge when you print.

The Line Item and the configuration are identical for both lines.

When you print, the lines merge together.

1		Door	6	EA	211.78	1,270.69
Change Options	Copy	2'-6" X 7'-0" 1 Door Single Opening	Line Details			Remove
More...						