
PLEASE READ ALL OF THE INSTRUCTIONS BEFORE UPDATING
Upgrade to PartnerPak+ release 3.0.8 requires you to be at release 3.0.5!

To begin using PartnerPak+ to generate Purchase Order files that can be imported into the KawneerDirect shopping cart, you will need to upgrade your PartnerPak+ to release 3.0.8. To be able to upgrade to this release you need to be currently running PartnerPak+ release 3.0.5 or greater. If you are not running release 3.0.5 or greater, you will need to upgrade with the CD that was shipped to you or go to the DeMichele Group's web site and go to the Downloads page (<http://www.demichelegroup.com/partnerpak/downloads.htm>).

Choose the recommended Option 2 - Update Installation (merges with existing catalog) and follow the Installation Instructions that are provided beneath the link. If you have any questions about upgrading to version 3.0.5 or greater, please call the DeMichele group or Dick Lindgren for assistance.

Once you are upgraded to release 3.0.5 or greater, you will be able to upgrade to release 3.0.8. Again, upgrade with the CD that was shipped to you or go to the DeMichele Group's web site and go to the Downloads page (<http://www.demichelegroup.com/partnerpak/downloads.htm>).

A new feature that is in this update is the ability to store and recall Proposals. ***If you currently use the information in PROPOSAL DEFAULTS under TOOLS, contact Chris Draper at the DeMichele Group prior to loading this update.***

If you load this update first before contacting Chris, any custom information in the PROPOSAL DEFAULTS will have to be reentered.

NOTE: Verify that your CMP matrix is complete and up to date!

Contacts:

KawneerDirect Technical Support

KawneerDirect@Alcoa.com
(877) 529-9321 (877) KAW-WEB1
(678)291-1632

Kawneer PartnerPak+ Specialist

Dick Lindgren dick.lindgren@alcoa.com
(770) 645-0029

PartnerPak+ Support Team

Chris Draper chris@demichelegroup.com
Phone: (480) 985-4926
Fax: (480) 985-3000
After Hours
– Emergency: (800) 733-6864

One Time Setup for PartnerPak+ / KawneerDirect Purchase Order Import

Once you have upgraded to PartnerPak+ release 3.0.8, you will need to make sure that a few screens of information are filled in completely and you will also need to select one option to turn on the feature in PartnerPak+. This will only be done the first time you set up PartnerPak+.

From the **Database** dropdown menu, select **Vendors**. In the **Name** field select **Kawneer Company Inc.**

Update all information to include the Kawneer location that is currently where your purchase orders are sent. **Be sure to include your Kawneer Customer Number which can be found on your Kawneer Invoice next to the billing address!**

The screenshot shows the 'VENDOR' setup window in the PartnerPak+ software. The window title is 'VENDOR' and it contains the following fields and options:

- Database:** Tools, Reports, PartnerPak+ Downloads, Kawneer Homepage, Kawneer Quick Forms, Contact Info, Tutorials
- Left Menu:** Catalog Parts, Metal Groups, Door Groups, Door Frames, Smart Fabs, Customers, Vendors (selected), Architects, Labor Info, CAD Groups, CAD Details, Arrange Keywords
- Name:** KAWNEER COMPANY INC.
- VENDOR NUMBER:** 1
- CUSTOMER NO.:** 4335
- NAME:** KAWNEER COMPANY INC
- ADDRESS1:** 555 GUTHRIDGE COURT
- ADDRESS2:**
- CITY:** NORCROSS
- STATE:** GA
- ZIP:** 30092
- PHONE:** (404) 448-4390
- FAX:** (404) 263-6133
- MODEM:** (404) 448-4390
- SALES REP:** Dick Lindgren
- LOCATION:** HEADQUARTERS
- KEY WORDS:**
 - EXTRUSION
 - GLASS
 - REGION-1
 - REGION-2
 - REGION-3
- CREDIT LIMIT:** 1
- TOTAL CREDITS:** 1
- SALES TO DATE:** 1
- TAX EXEMPT NO.:** NONE
- LAST ACTIVITY:** 00/00/00

Enter Your Customer Number For This Vendor

Ok Cancel

From the **Tools** dropdown menu, select **Company Info**. Verify that your *Company Information* is completed.

Tools | Reports | PartnerPak+ Downloads | Kawneer Homepage | Kawneer Quick Forms | Contact Info | Tutorials

Backup & Restore
Proposal Defaults
Company Info
Company Logo
Set Parameters Ctrl+P

COMPANY INFORMATION:

COMPANY NAME: The Metal Man Inc.
ADDRESS: 123 Mockingbird Lane
CITY: Anytown
STATE: GA
ZIP CODE: 30014
PHONE NUMBER: 555-555-5555
FAX NUMBER: 555-555-5556
USER NAME: Kurt "The Metal Man" Hayden

Enter Company Name (60 Char. Max.)

Ok Cancel

From the **Tools** dropdown menu, select **Set Parameters**. Click on the **General Parameters** button.

Tools | Reports | PartnerPak+ Downloads | Kawneer Homepage | Kawneer Quick Forms | Contact Info | Tutorials

Backup & Restore
Proposal Defaults
Company Info
Company Logo
Set Parameters Ctrl+P

MISCELLANEOUS PARAMETERS

STOCK PRICING MULTIPLIER: 1
FABRICATED PRICING MULTIPLIER: 1

GENERAL PARAMETERS
CAD PARAMETERS
STRUCTURAL PARAMETERS
SET CMP MATRIX
GLASS TEMPERING RULES

DEFAULT STANDARD LABOR
DEFAULT STICK LABOR
DEFAULT COMBINATION LABOR
FRAME SET DEFAULTS
GLASS OPT DEFAULTS
GLASS STOCK SIZES

Enter Stock Pricing Multiplier
(Ex. .60 for 40% Discount)

Ok Cancel

On the **General Parameters: Default** screen, the **Validate for KawneerDirect Export** checkbox at the bottom of the list of parameters must be checked to process an order for KawneerDirect.

MISCELLANEOUS PARAMETERS

GENERAL PARAMETERS: DEFAULT

STOCK PRICING MULTIPLIER: []

FABRICATED PRICING MULTIPLIER: []

GENERAL PARAMETERS

CAD PARAMETERS

STRUCTURAL PARAMETERS

SET CMP MATRIX

GLASS TEMPERING RULES

Enter Stock Pricing (Ex. .80 for 40% D)

SAW CUT WIDTH 0.1875

DIMENSION TOLERANCE (1/32 OR 1/16) 1/32

PERCENT TAX ON FRAMING/MATERIALS 0

PERCENT MARKUP ON FRAMING/MATERIALS 0

PERCENT TAX ON DOOR/DOOR FRAMING 0

PERCENT MARKUP ON DOOR/DOOR FRAMING 0

PERCENT TAX ON GLAZING 0

PERCENT MARKUP ON GLAZING 0

PERCENT TAX ON SHOP LABOR 0

PERCENT MARKUP ON SHOP LABOR 0

PERCENT TAX ON FIELD LABOR 0

PERCENT MARKUP ON FIELD LABOR 0

PERCENT TAX ON SPECIAL CHARGES 0

PERCENT MARKUP ON SPECIAL CHARGES 0

PERCENT TAX ON MATERIAL MARKUP 0

PERCENT TAX ON LABOR MARKUP 0

MIN. LENGTH OF USABLE DROP 12

ADD TO STOCK LENGTH FOR OPTIMIZATION 1

TRIM DIMENSION FOR S/L OPTIMIZATION 0

MIN. GLASS SIZE (SQ. FT.) 3

ROUND TO ROLL OR BOX QUANTITY

DISPLAY ALL NUMBERS IN DECIMALS

COMBINE PATTERNS IN OPTIMIZATION

METAL OPT DOWNLOAD FOR TPS

MERGE FILE FOR TPS

METRIC OUTPUT

EXTRUSION MIN LENGTH 204

EXTRUSION MAX LENGTH 348

OPTIMIZER STEP SIZE 12

ADD FOR RADIUS BENDING 36

VERTICAL FAB LOCATIONS

VALIDATE FOR KAWNEERDIRECT EXPORT

Enter Width of Cut Saw Blade Makes On Each Pass

Ok Cancel

VALIDATE FOR KAWNEERDIRECT EXPORT

Verify that your CMP matrix is complete and up to date.

Tools Reports PartnerPak+ Downloads Kawneer Homepage Kawneer Quick Forms Contact Info Tutorials

Backup & Restore

Proposal Defaults

Company Info

Company Logo

Set Parameters CHHP

MISCELLANEOUS PARAMETERS

STOCK PRICING MULTIPLIER: []

FABRICATED PRICING MULTIPLIER: []

GENERAL PARAMETERS

CAD PARAMETERS

STRUCTURAL PARAMETERS

SET CMP MATRIX

GLASS TEMPERING RULES

DEFAULT STANDARD LABOR

DEFAULT STICK LABOR

DEFAULT COMBINATION LABOR

FRAME SET DEFAULTS

GLASS OPT DEFAULTS

GLASS STOCK SIZES

Enter Stock Pricing Multiplier (Ex. .80 for 40% Discount)

Ok Cancel

That concludes the one time setup options to be able to use PartnerPak+ to generate Purchase Orders for easy uploading to KawneerDirect.

Generating PartnerPak+ Purchase Order

Use PartnerPak+ as you have in the past to enter your elevations, entering frames and doors. Note that KawneerDirect will only accept orders that are Price Book supported, **with the exception of A2 Custom Doors**. Any items that are not Price Book supported will result in a warning that a KawneerDirect order cannot be created. You will still be able to generate a paper based Purchase Order which can be handled via fax or mail, as in the past.

Complete a **Bid Recap**.

To prepare the bid to be used to generate a purchase order for uploading to KawneerDirect, ensure that the check box next to “**Verify Project for KawneerDirect Order**” is selected. If you would like to run a bid that will not be used to generate a PO for KawneerDirect, you may deselect the check box by clicking on it.

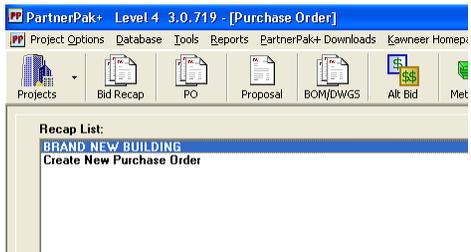
Complete the Bid Recap process by answering the questions as you have always done.

Note: You may make changes to item quantities or delete an item in the bid recap **if the Mark (MK) number is 0**. Any other number in the Mark (MK) column indicates that the item cannot be changed and you will get an error message if you try to make a change!

MK	PRODUCT CODE	DESCRIPTION	FINISH	VENDOR	QUAN	PRICE	TOTAL	WEIGHT	MULT	CH
1	190-ROPMS36	3'0 X 7'0 STANI	#17 CLEAF	KAWNEER C	1	510.00	154.94	36	0.3038	<input type="checkbox"/>
1	451-ROPMS36-TR	3'0 X 7'0 STD M	#17 CLEAF	KAWNEER C	1	444.00	134.89	52	0.3038	<input type="checkbox"/>
1	138524	SUB ADAMS RI	#00 UNDEF	KAWNEER C	1	275.00	83.55	0	0.3038	<input type="checkbox"/>
0	27073	SETTING BLOC	#00 UNDEF	KAWNEER C	6	1.15	2.10	0	0.3038	<input type="checkbox"/>
0	28856	#12 X 1 1/8" AB	#00 UNDEF	KAWNEER C	36	.11	1.20	0	0.3038	<input type="checkbox"/>
0	ANCHOR PACK	ANCHOR PACK	#00 UNDEF	OTHER	60	3.69	221.40	0	1	<input type="checkbox"/>
0	451CG524	SHEAR BLOCK	#00 UNDEF	KAWNEER C	2	2.50	1.52	0	0.3038	<input type="checkbox"/>
0	451CG525	SHEAR BLOCK	#00 UNDEF	KAWNEER C	4	2.50	3.04	0	0.3038	<input type="checkbox"/>
0	451105	1" WATER DEF	#00 UNDEF	KAWNEER C	6	.60	1.09	0	0.3038	<input type="checkbox"/>
0	480520	"W" SIDE BLOC	#00 UNDEF	KAWNEER C	8	1.20	2.92	0	0.3038	<input type="checkbox"/>
0	27081	SETTING BLOC	#00 UNDEF	KAWNEER C	6	.52	.95	0	0.3038	<input type="checkbox"/>
0	450114	TRIFAB II END	#00 UNDEF	KAWNEER C	2	1.85	1.12	0	0.3038	<input type="checkbox"/>

Again, if a non-KawneerDirect supported item is included in the project, a dialog box will appear to warn you.

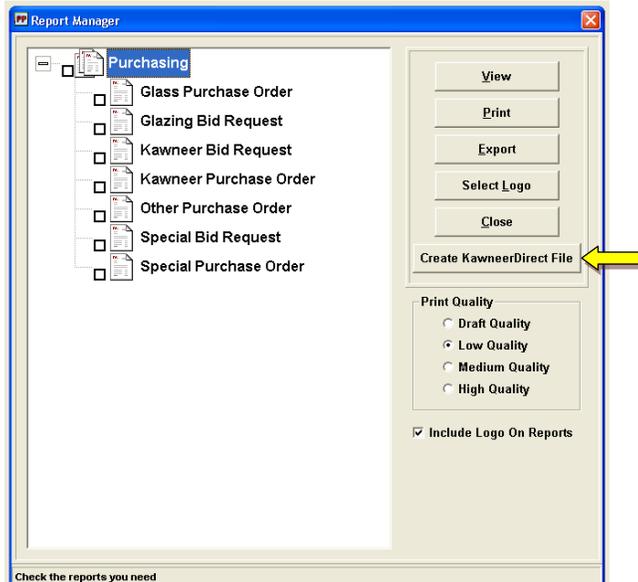
Click on the **PO** button to generate a purchase order. Select the project (which you have previously run a bid recap on) from the **Recap List**. To export this project for KawneerDirect, make sure that the checkbox **Verify Project for KawneerDirect Export** in the lower right hand corner of the screen is selected. If you do not want to send the order through KawneerDirect, you may uncheck the box.



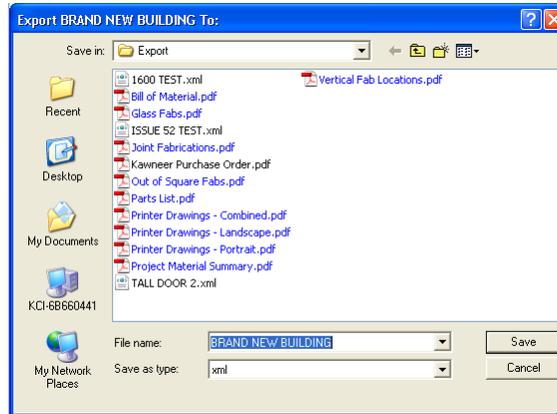
Note: If the **Verify Project for KawneerDirect Export** checkbox is grayed out after you select the project, you have not run a Bid Recap with the **Verify Project for KawneerDirect Order** checkbox selected or the order is not able to be verified for KawneerDirect.

If the project was created in a previous release of PartnerPak+, this project will not be able to be verified for export to KawneerDirect until the project has been run through the ALT BID process or the project can be reopened in the Graphics Editor. Each frame will need to be reviewed and saved in the Graphics Editor. Then the bid recap can be run again and a PO file can be generated for KawneerDirect. **If you are unfamiliar with the ALT BID process contact Dick Lindgren or Chris Draper for assistance.**

Complete the **General Purchase Order Information** entering your PO number(s) and other information. After entering information for all of your POs, the Report Manager screen will appear. To generate a file that can be used to import the PO directly into the KawneerDirect shopping cart, click on the **Create KawneerDirect File** button.



Save the file to a convenient location with an appropriate name. The default location will be the C:\Program Files\DeMichele Group\PartnerPak+ for Windows\Export directory. If you save to a different location, remember that location for later import into KawneerDirect. Click **Save**.



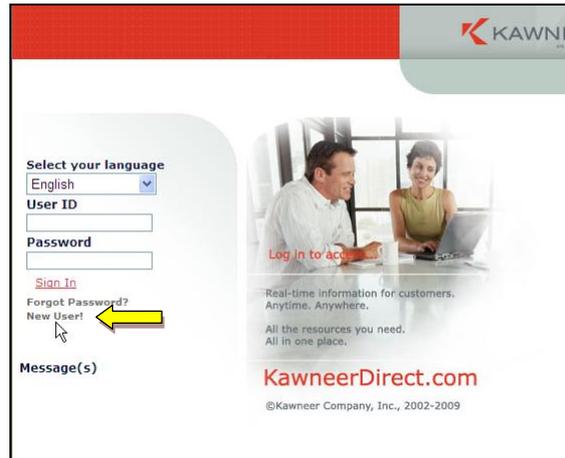
Print the Kawneer Purchase Order from the Report Manager window to ***compare the Kawneer Purchase Order with the KawneerDirect shopping cart!***

Print any of the other documents in the Report Manager window that you desire. Click on **Close** when done.

Import PartnerPak+ Purchase Order into KawneerDirect Shopping Cart

Log on to KawneerDirect (<http://www.kawneerdirect.com/>).

If you need to establish a new KawneerDirect account, click on **New User!** on the left side.



Complete the form and click **Submit**.

Please fill out this form to request a User Id and Password for access to **KawneerDirect**

Please note this request may take up to 48 hours to process

Customer Number:

Company Name:

First Name:

Last Name:

Job Title:

City:

State or Province:

Zip or Postal Code:

Country:

E-Mail address:

**** This E-mail address will receive notifications of new orders.**

Please confirm E-Mail address:

Voice Phone: - - Ext.

Select KawneerDirect Menu Options: Include Account & Invoice information

Please enter your desired User ID and Password below:

KawneerDirect User ID:

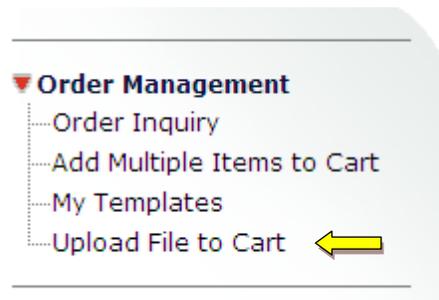
**** (User ID must be between 8 and 10 characters. All lowercase.)**

KawneerDirect Password:

**** (Password must be between 8 and 10 characters. All lowercase.)**

Order Entry request implies acceptance of Kawneer's North American Price Book Terms and Conditions. Please [click here](#) to review the Terms and Conditions.

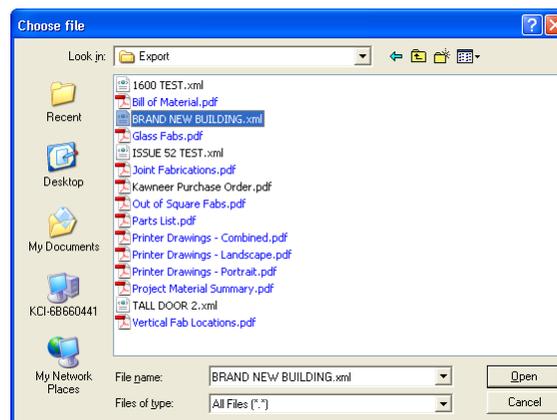
Once you are logged in to KawneerDirect, under **Order Management** on the navigation bar on the left, select **Upload File to Cart**.



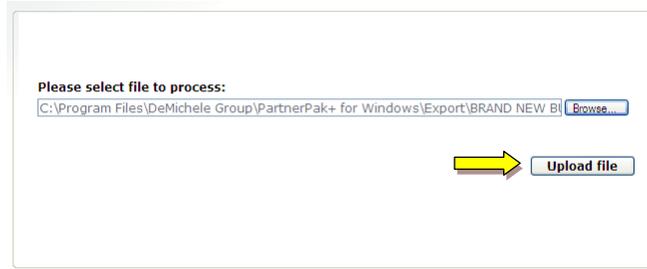
The following screen will appear, asking you to **Please select file to process:**



Click on the **Browse...** button and navigate to the KawneerDirect file you created in PartnerPak+. Highlight the desired file and click **Open**.

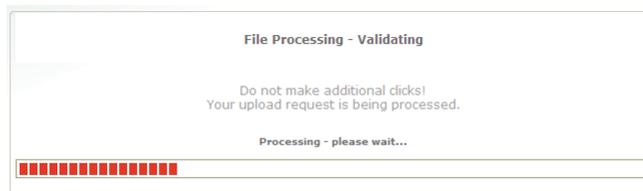


The file (with complete directory path) will be displayed. When the correct file has been selected, click on the **Upload file** button.



During the next few minutes your purchase order will be uploaded, validated and processed through KawneerDirect. The time needed to complete this process depends on the size of your order.

During this time, **do not click on any buttons.**



When completed, your KawneerDirect shopping cart will be displayed with all of the items from your PO.

Note: If you had previous items in your shopping cart, they will also be shown.

Line No	Item #	Description	UOR	Quantity	List Price	Multiplier	Price	Extended Price	Delete	Compare
1	162001-17-289	LIGHT 6" VERT/HORZ 1"	EA	48	420.0000	0.3234	135.8280	6,519.7440	<input type="checkbox"/>	<input type="checkbox"/>
2	162006-17-289	EXTERIOR COVER-3/4" PROJ	EA	55	66.0000	0.3234	21.3444	1,173.9420	<input type="checkbox"/>	<input type="checkbox"/>
3	162043-17-289	3/4" DR ADAPTER 1" FRAME	EA	3	294.0000	0.3234	95.0796	285.2388	<input type="checkbox"/>	<input type="checkbox"/>
4	162203-17-289	6"SYS OPEN BACK PERIMETER	EA	7	435.0000	0.3234	140.6790	984.7930	<input type="checkbox"/>	<input type="checkbox"/>
5	162335-10-289	PRESSURE PLATE WITH HOLES	EA	46	90.0000	0.3234	29.1060	1,338.8760	<input type="checkbox"/>	<input type="checkbox"/>
6	162505-10-289	Perimeter Pressure Plate	EA	9	125.0000	0.3234	40.4250	363.8250	<input type="checkbox"/>	<input type="checkbox"/>
7	450502-17-289	S/A TRANS BAR WITH WEATH	EA	1	300.0000	0.3038	91.1400	91.1400	<input type="checkbox"/>	<input type="checkbox"/>
8	450520-17-289	SNAP IN DOOR STOP	EA	3	63.0000	0.3038	19.1394	57.4182	<input type="checkbox"/>	<input type="checkbox"/>
9	069139-10-289	SEALAIS THRESHOLD	EA	2	110.0000	0.4939	54.3312	108.6624	<input type="checkbox"/>	<input type="checkbox"/>
10	027853	SETTING BLOCK .437x1.375x4.125	EA	256	1.1500	0.3233	0.3718	95.1808	<input type="checkbox"/>	<input type="checkbox"/>
11	128394	*12 X 1-7/8" B PHTF	EA	700	0.3000	0.3233	0.0970	67.9000	<input type="checkbox"/>	<input type="checkbox"/>
12	128405	*12 x 7/8" AB PHTF	EA	700	0.1500	0.3227	0.0484	33.8800	<input type="checkbox"/>	<input type="checkbox"/>
13	027855	SIDE BLOCK .297x1.200	EA	256	0.8000	0.3234	0.2587	64.2272	<input type="checkbox"/>	<input type="checkbox"/>
14	128406	1/4" X 1" AB HWMTF	EA	2300	0.3500	0.3231	0.1131	260.1300	<input type="checkbox"/>	<input type="checkbox"/>
15	162308	F ANCHOR	EA	16	7.6000	0.3234	2.4578	39.3248	<input type="checkbox"/>	<input type="checkbox"/>
16	162388	PERIMETER END CAP 1" FRAME	EA	72	1.1500	0.3233	0.3718	26.7696	<input type="checkbox"/>	<input type="checkbox"/>
17	162319	SHEAR BLOCK 6" DR JB BTH	EA	8	3.3500	0.3234	1.0833	8.6664	<input type="checkbox"/>	<input type="checkbox"/>
18	162309	7 ANCHOR 6"	EA	48	8.4000	0.3234	2.7166	120.3968	<input type="checkbox"/>	<input type="checkbox"/>
19	162377	6" SHEAR BLOCK	EA	192	3.9500	0.3234	1.2773	244.2416	<input type="checkbox"/>	<input type="checkbox"/>
20	162394	6"SYS SHEAR BLOCK HD/SL	EA	120	3.5000	0.3234	1.1319	135.8280	<input type="checkbox"/>	<input type="checkbox"/>
21	162321	JOINT PLUG PRESSURE PLATE	EA	312	0.6000	0.3233	0.1940	60.5280	<input type="checkbox"/>	<input type="checkbox"/>
22	027857	1/4" FIXED GASKET	PT	500	1.3000	0.3234	0.4204	210.2000	<input type="checkbox"/>	<input type="checkbox"/>
23	027850	1/4" FIXED GASKET	PT	4500	1.1400	0.3234	0.3687	1,659.1500	<input type="checkbox"/>	<input type="checkbox"/>
24	162310	THERMAL BREAK	PT	2000	1.1400	0.3234	0.3751	750.2000	<input type="checkbox"/>	<input type="checkbox"/>
25	190-PDRH872-17	190 PR OF MS 72" A1 DR	EA	4	1,873.0000	0.3136	587.3725	2,349.4900	<input type="checkbox"/>	<input type="checkbox"/>
								Total Price:	17,062.7126	

Carefully verify that all of the items in the cart are correct and that your order is complete!

Please verify that your purchase order and your shopping cart contents include the items that you are ordering. You will also receive order confirmation via email. Please take the time to verify that the email is correct with all of the items that you have ordered.

You may continue shopping or use any of the other KawneerDirect supported operations. When you are finished, click on **Proceed To Check Out**.

Select the shipping location for your KawneerDirect order.

Select Shipping Location

Current Shipping Location:
 102631 - Big Ole Building
 123 Any Lane
 COVINGTON, GA - 30014

Search by Shipping Loc# Search by Address Nam

On the Checkout Page you will see that several of the required fields are pre-populated for your convenience. These include Job Name, Job City, P.O. Number and Requested Date.

You will need to select the **Job State** from the dropdown list and select **Freight Terms**.

You can also enter up to two additional email addresses to receive notification of the order being submitted.

Checkout Page

Applicable state sales tax will be added after the order is processed.
 Shipping charge will be calculated at the time of order processing.

Order Information

Job Name: * BRAND NEW BUILDING

Job City: * Covington

Job State: * Please Select

P.O. Number: * 11221

Freight Terms: * Select Freight Terms

Requested Date (MM/DD/YY): * 02/10/10

Notify Email 1: [Text Box]

Notify Email 2: [Text Box]

Was Job Quoted?

Quote Number/Additional Notes: [Text Box]

Additional Freight Instructions: [Text Box]

Special Comments: [Text Area]

After completing the required information fields, click **Continue** on the bottom of the screen.

Your order will be processed. This will take a few minutes. **Do not click on anything during the processing.**

The order summary will display. Please review the data for accuracy and completeness. When complete, click **Confirm Order** at the bottom of the screen. Again, do not click on anything while the order is processed.

Order Summary

Shipping and Tax will be calculated at the time of order processing.
Review your order details below, then click "Confirm Order"

Billing Address

Kawneer Test Customer
555 Guthridge Court
Norcross, GA, 30092

Shipping Address

Big Ole Building
123 Any Lane
COVINGTON, GA, 30014

Order Header

Job Name:	BRAND NEW BUILDING	Job Number:	10-0200858923
City:	Covington	State:	GA
PO #	11221	Request Date	02/19/10
Notify Email 1		Notify Email 2	
Freight Terms:	Collect	Was Job Quoted?	<input type="checkbox"/>
Additional Freight Instructions:	Quote Number/Additional Notes:		
Special Comments			

Default Credit Card Information

Pay Order By Credit Card: Yes No

Order Details

Line No	Item	Item Description	UOM	Quantity	List Price	Multiplier	Unit Price	Total Price
1	162001-17-289	LIGHT 6" VERT/HORZ 1"	EA	48	420.0000	0.3234	135.8280	6519.7440
2	162006-17-289	EXTERIOR COVER-3/4" PROJ	EA	55	66.0000	0.3234	21.3444	1173.9420
3	162043-17-289	3/4" DR ADAPTER 1" FRAME	EA	3	294.0000	0.3234	95.0796	285.2388
4	162203-17-289	6"SYS OPEN BACK PERIMETER	EA	7	435.0000	0.3234	140.6790	984.7530

An order confirmation with order (SO) number will be displayed. You can print the order, review the order or download the order to Excel by clicking on the appropriate button at the bottom of the screen.

Order Confirmation

Your order has been confirmed.

Your order (SO) number is **2284906**

Your order has been successfully created. Please keep the order number for future reference. You will soon receive an email with order details. You can click on "Review Order" button below to review the order details.

[Print Order](#) [Review Order](#)

[Download Order To Excel](#)

An email will arrive shortly with the details of your order.

Please review to verify accuracy and completeness. If you do find an error, please contact your customer services coordinator.