



genesisplus+

2018



REPORT LOGOS

Module 1: Adding Corporate Branding

LEVEL: INTERMEDIATE

Genesis Release 18

INTRODUCTION

IN THIS MANUAL WE WILL COVER ADDING CORPORATE BRANDING ONTO THE GENESIS SOFTWARE PACKAGE. IT WILL COVER THE FOLLOWING ELEMENTS

- 1) CUSTOMISED REPORTS
- 2) PRESENTATION DRAWINGS
- 3) AUTOSHOP TEMPLATES

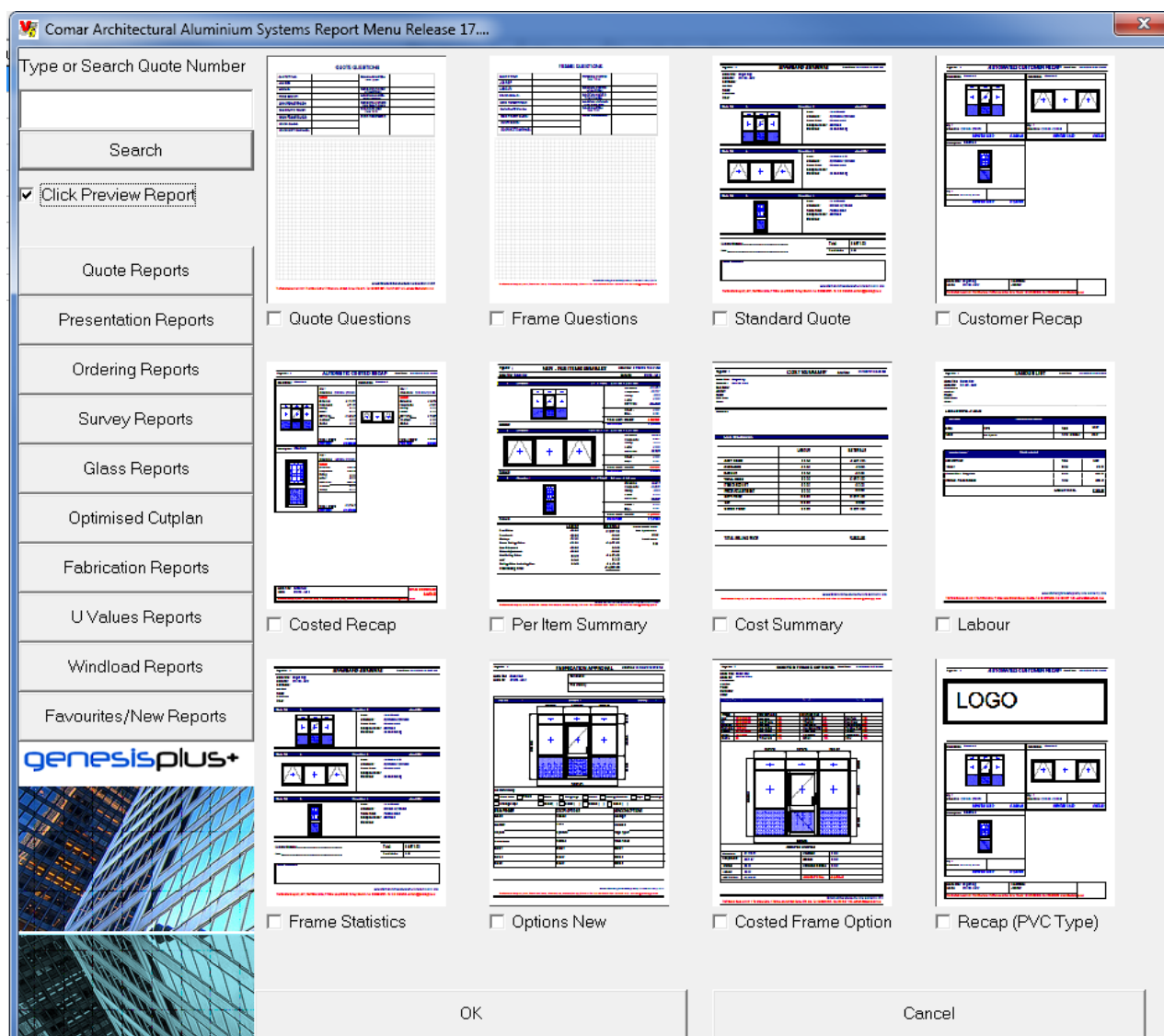
CUSTOMISED QUICK REPORTS

THE CUSTOMISED REPORTS IN GENESIS ARE WRITTEN IN THE “QUICK REPORT” FORMAT, THEY ARE BUILT INHOUSE BY COMAR AND USE AN SQL LANGUAGE TO LOCATE AND REPORT THE DATA FROM THE GENESIS SOFTWARE

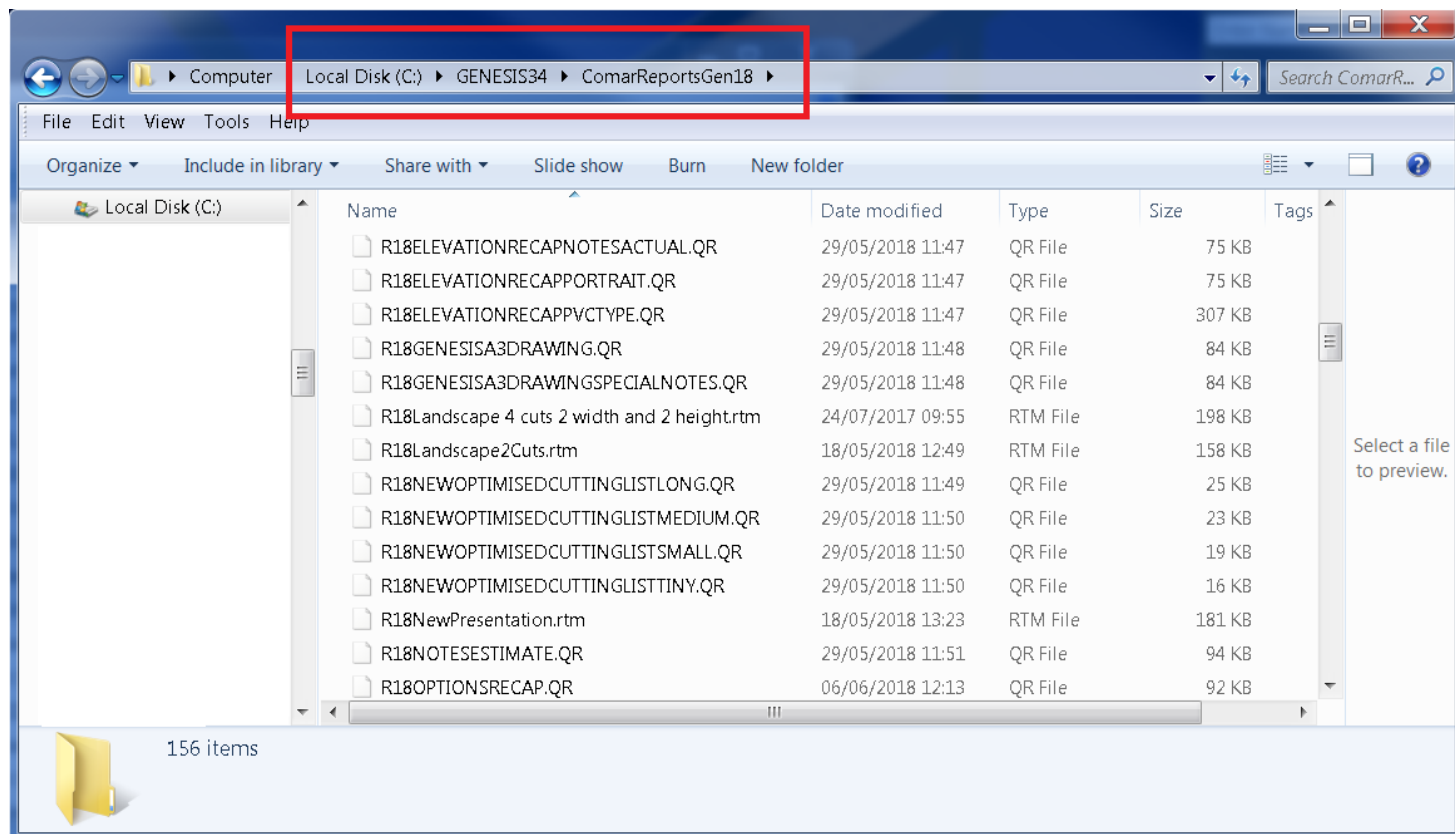
THEY ARE ALL ACCESSIBLE USING THE FOLLOWING BUTTON AT THE TOP OF GENESIS



THIS BUTTON BRINGS UP A MACRO (WRITTEN IN VISUAL BASIC) AND EACH TICK BOX LINKS TO A FILE STORED EXTERNALLY ON YOUR HARD DRIVE. THIS ALLOWS MULTI USERS WITHIN THE SAME COMPANY AND USING THE SAME DATABASE ON A NETWORK TO HAVE DIFFERENT REPORTS LAYOUT, BRANDING AND CUSTOMISED DETAILS PER USER.



THE LOCATION FROM THESE FILES ARE AS FOLLOWS.

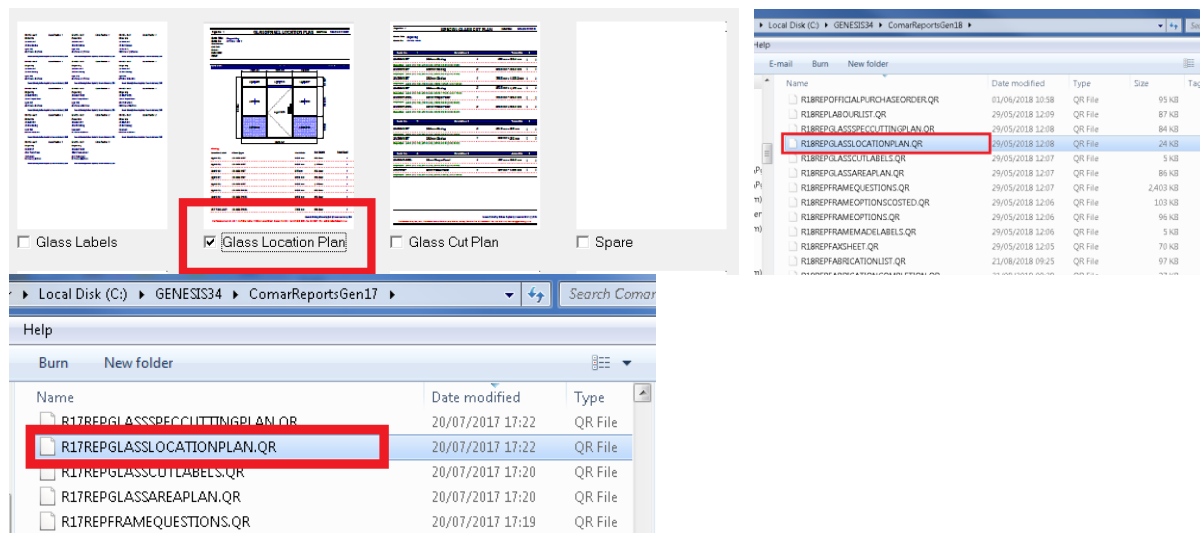


INCLUDED IN GENESIS IS A VERSION OF QUICK REPORTS WHICH ALLOWS YOU TO OPEN THE REPORTS (THEY CANNOT BE OPENED DIRECTLY)

THE FILE NAMES ARE GENERALLY SIMILAR TO HOW THEY ARE NAMED WITHIN THE MACRO

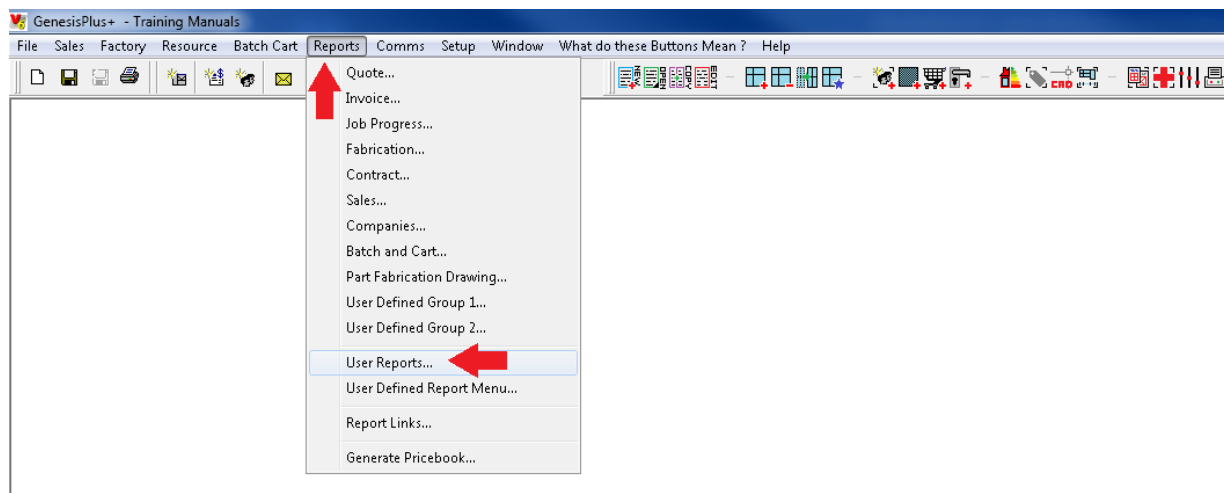
THE 'R17' PART OF THE FILENAME INDICATES THE VERSION NUMBER (RELEASE 17)

THE 'REP' PART OF THE FILENAME JUST MEANS REPORT

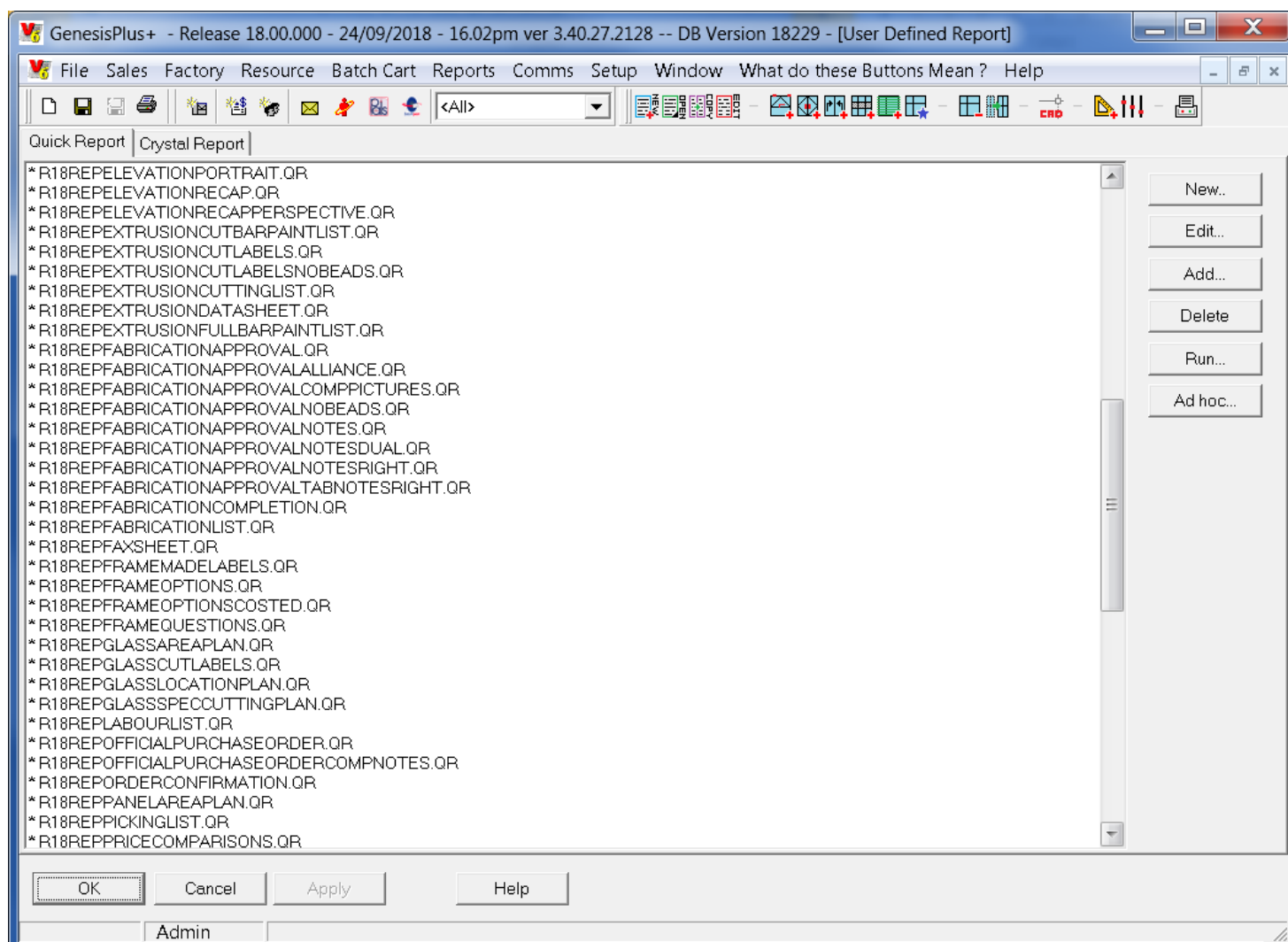


OPENING THE REPORT TO MODIFY IT.

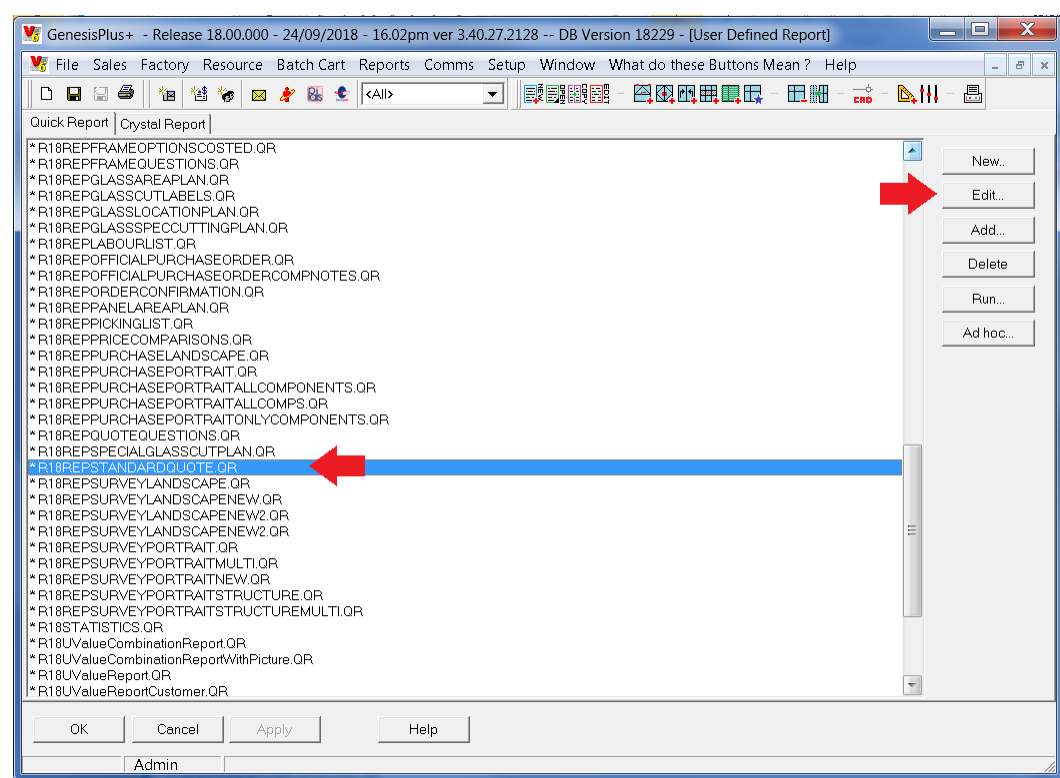
OPEN GENESIS
GO TO REPORTS
THEN DOWN TO USER REPORTS



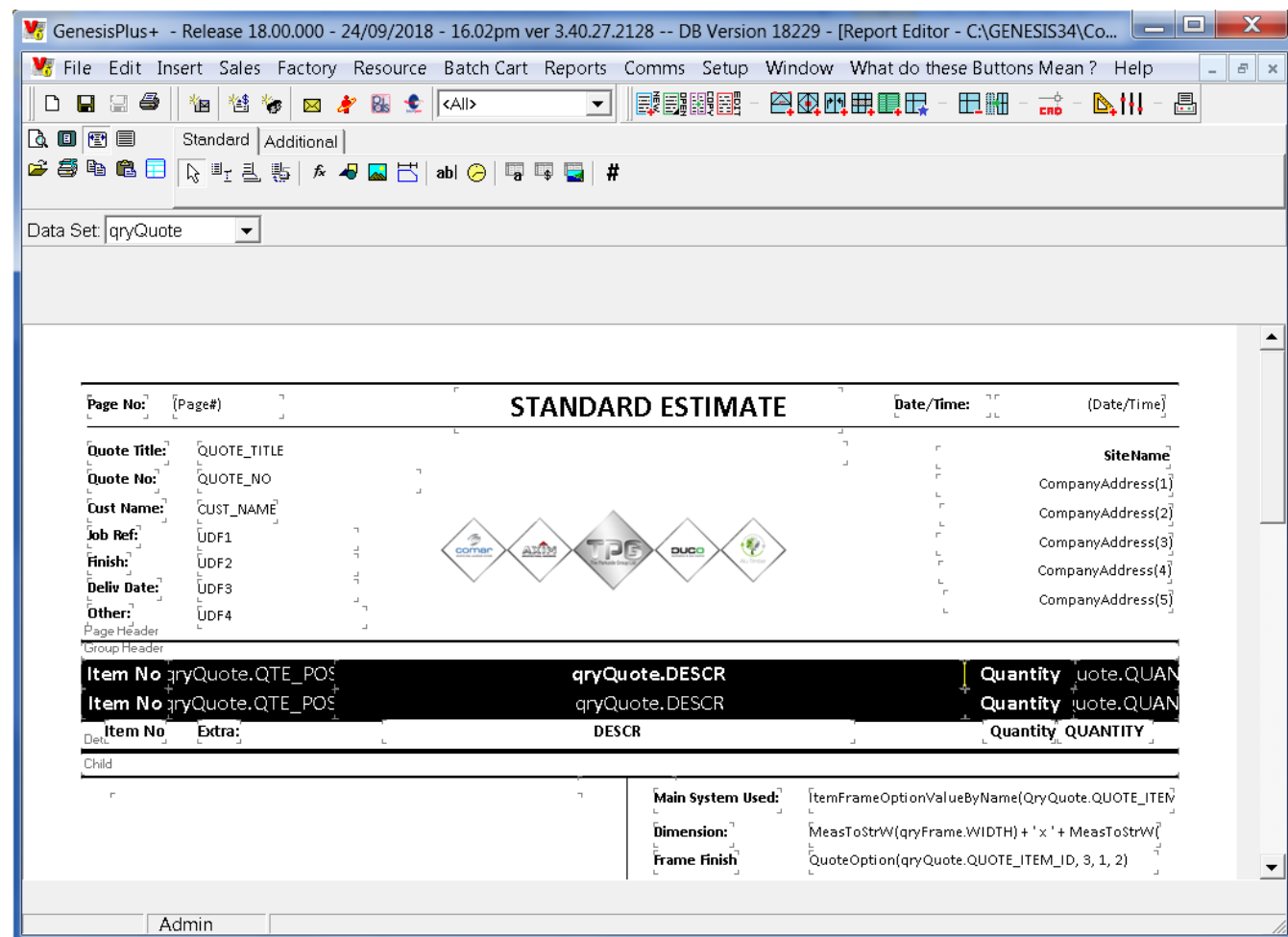
THE FOLLOWING MENU WILL COME UP, THIS HAS ALL QUICK REPORTS LISTED



LETS START OFF WITH THE STANDARD QUOTE REPORT. LOOK THROUGH THE LIST USING THE UP AND DOWN SLIDE BAR AND SEARCH FOR 'R18REPSTANDARDQUOTE.QR' (ONLY CLICK ONCE ON THIS NAME WHEN YOU FIND IT AS CLICKING TWICE WILL TRY AND RUN IT). THEN CLICK ONTO 'EDIT'



THIS WILL BRING UP THE REPORT EDITOR



USING YOUR MOUSE HIGHLIGHT THE COMAR LOGO AND THEN USING YOUR KEYBOARD RIGHTCLICK.

GenesisPlus+ - Release 18.00.000 - 24/09/2018 - 16.02pm ver 3.40.27.2128 -- DB Version 18229 - [Report Editor - C:\GENESIS34\Co...

File Edit Insert Sales Factory Resource Batch Cart Reports Comms Setup Window What do these Buttons Mean? Help

Standard Additional

abl

Load

Page No: {Page#} STANDARD ESTIMATE Date/Time: {Date/Time}

Quote Title: QUOTE_TITLE SiteName

Quote No: QUOTE_NO CompanyAddress(1)

Cust Name: CUST_NAME CompanyAddress(2)

Job Ref: UDF1 CompanyAddress(3)

Finish: UDF2 CompanyAddress(4)

Deliv Date: UDF3 CompanyAddress(5)

Other: UDF4

Page Header

Group Header

Item No qryQuote.QTE_POS qryQuote.DESCR Quantity quote.QUAN

Item No qryQuote.QTE_POS qryQuote.DESCR Quantity quote.QUAN

Item No Extra: DESCR Quantity QUANTITY

Child

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Admin

THE LOAD BUTTON AT THE TOP

GenesisPlus+ - Release 18.00.000 - 24/09/2018 - 16.02pm ver 3.40.27.2128 -- DB Version 18229 - [Report Editor - C:\GENESIS34\Co...

File Edit Insert Sales Factory Resource Batch Cart Reports Comms Setup Window What do these Buttons Mean? Help

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Load

Page No: {Page#} STANDARD ESTIMATE Date/Time: {Date/Time}

Quote Title: QUOTE_TITLE SiteName

Quote No: QUOTE_NO CompanyAddress(1)

Cust Name: CUST_NAME CompanyAddress(2)

Job Ref: UDF1 CompanyAddress(3)

Finish: UDF2 CompanyAddress(4)

Deliv Date: UDF3 CompanyAddress(5)

Other: UDF4

Page Header

Group Header

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Item No qryQuote.QTE_POS qryQuote.DESCR Quantity quote.QUAN

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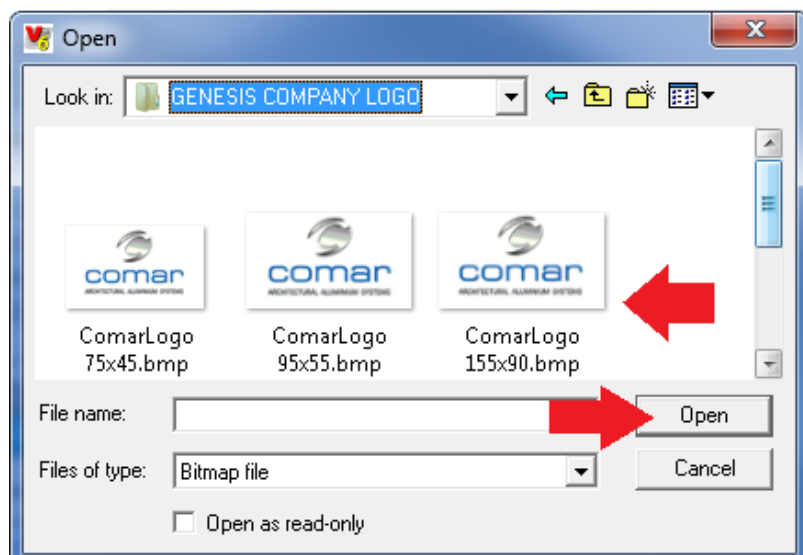
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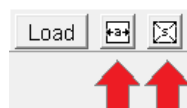
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WHEN THE BELOW BOX COMES UP, FIND YOUR LOGO (ALL LOGOS HAVE TO BE IN .BMP FORMAT). IT IS RECOMMENDED THAT YOU HAVE A FEW SIZES OF LOGO TO TRY AS THEY WILL COME UP BETTER ON SOME REPORTS IN DIFFERENT SIZES

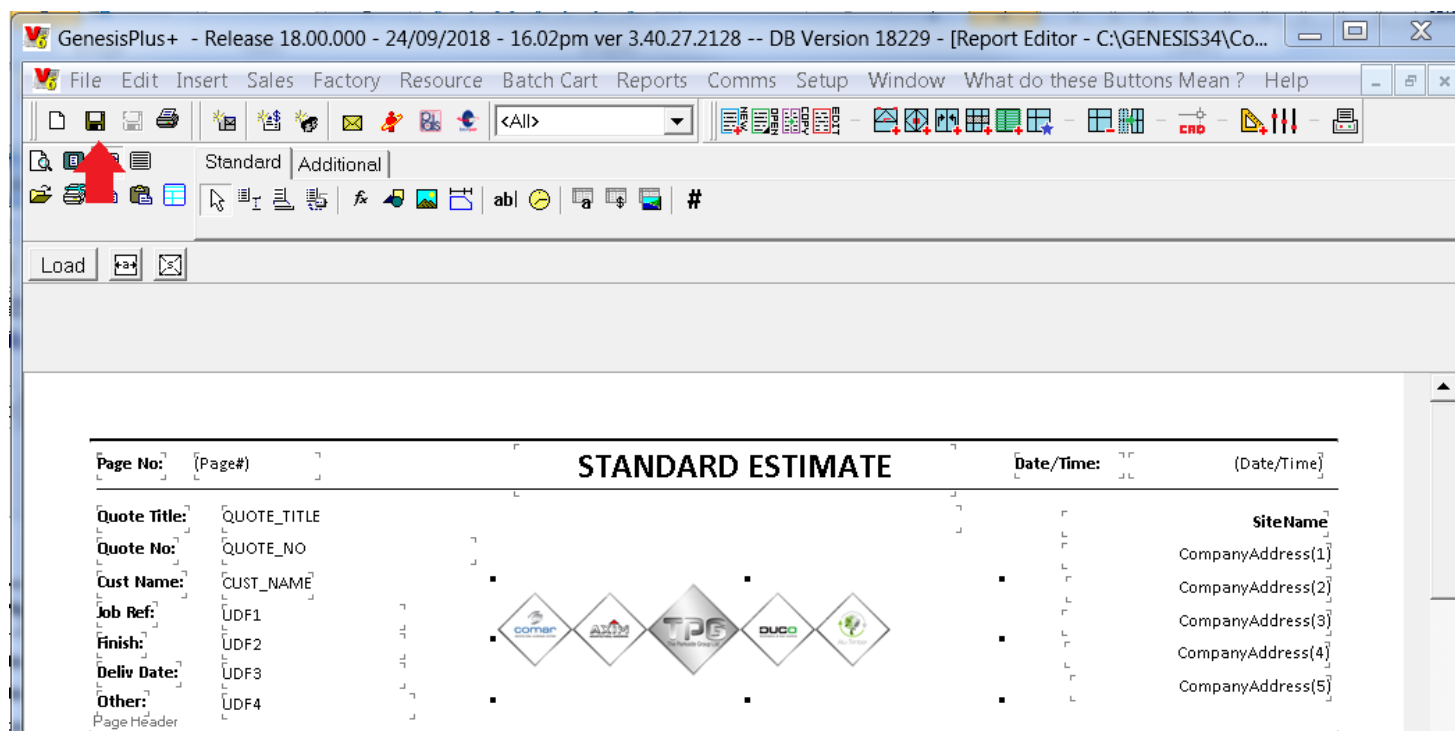


THIS WILL NOW LOAD YOUR NEW LOGO. USING A COMBINATION OF AUTOSIZE, STRETCH AND THE POINTS AROUND THE PICTURE YOU CAN MODIFY THE SIZE. IF YOU CANNOT GET IT TO THE CORRECT SIZE, TRY IMPORTING A DIFFERENT SIZE PICTURE



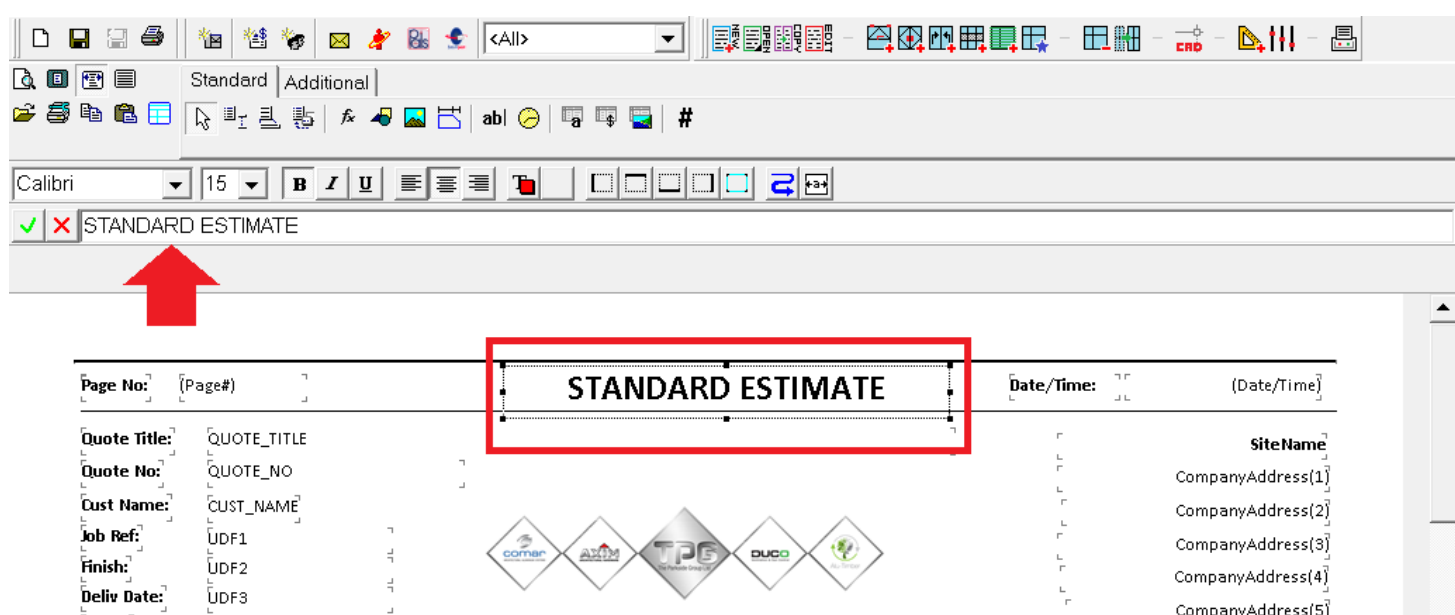
Page No: [Page#]		STANDARD ESTIMATE		Date/Time: [Date/Time]
Quote Title:	QUOTE_TITLE			SiteName
Quote No:	QUOTE_NO			CompanyAddress(1)
Cust Name:	CUST_NAME			CompanyAddress(2)
Job Ref:	UDF1			CompanyAddress(3)
Finish:	UDF2			CompanyAddress(4)
Deliv Date:	UDF3			CompanyAddress(5)
Other:	UDF4			
Page Header				
Group Header				
Item No	qryQuote.QTE_POS	qryQuote.DESCR	Quantity	quote.QUAN

WHEN YOU ARE HAPPY WITH THE SIZE OF YOUR LOGO CLICK THE SAVE BUTTON



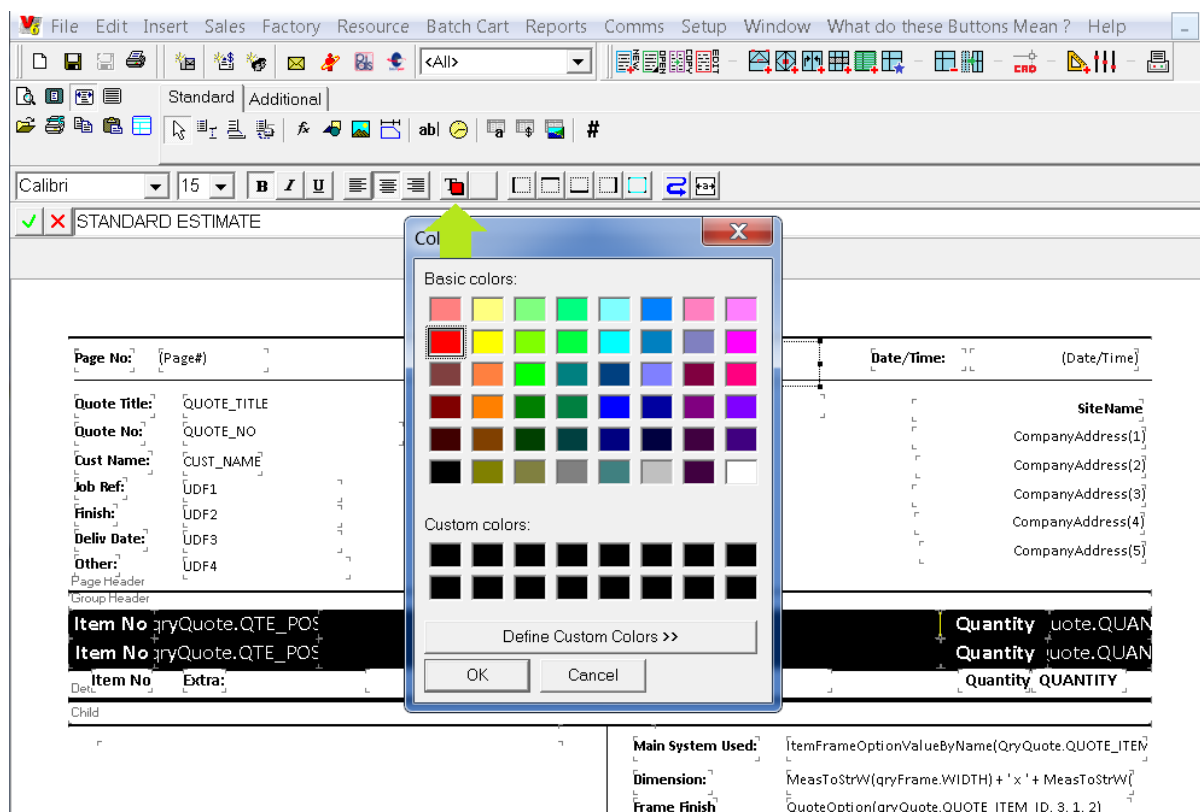
WHILST THIS REPORT IS OPEN LETS TRY CHANGING SOMETHING ELSE WE WILL TRY CHANGING THE FONT OF THE TITLE AND THE NAME. THIS IS JUST REALLY TO GIVE YOU AN IDEA OF WHAT YOU CAN DO TO THE REST OF THE REPORT TO ADD YOUR CORPORATE COLOURS.

HIGHLIGHT THE TITLE AS SHOW BELOW AND NOW USING THE NEW TEXT BOX SHOWN IN THE ARROW RENAME THE REPORT AND THEN CLICK ONTO THE SMALL GREEN TICK BOX TO THE LEFT OF THE TEXT BOX TO APPLY THIS.

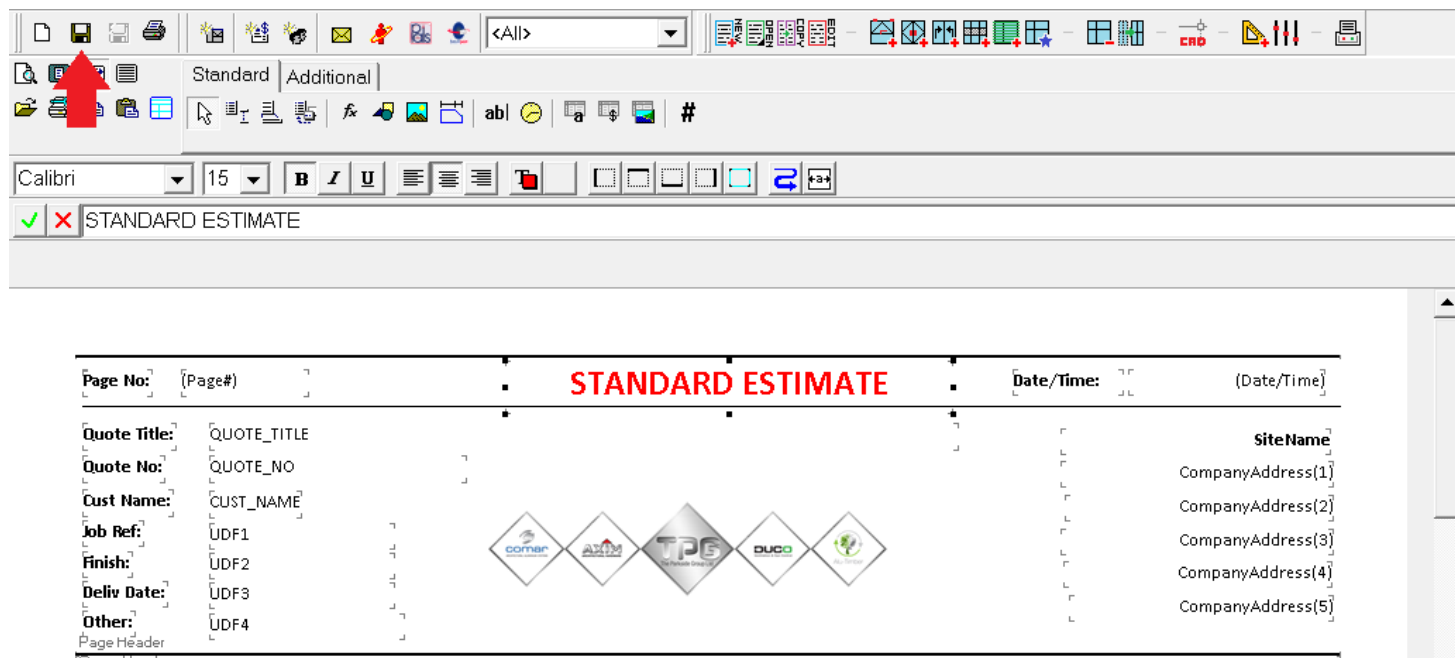


WE CAN ALSO CHANGE THE COLOUR BY CLICKING ONTO THE TEXT COLOUR BUTTON (AS SHOWN IN THE ARROW)

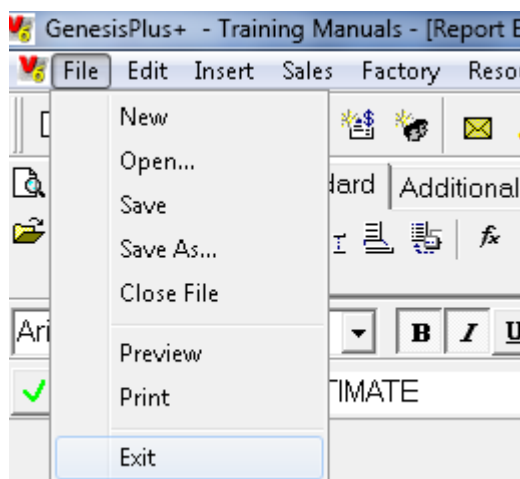
WHEN THE COLOUR BOX COMES UP CHOOSE A DIFFERENT COLOUR AND THEN CLICK OK



AGAIN CLICK ONTO THE SAVE BUTTON AND THIS WILL SAVE THE CHANGES MADE TO THE REPORT



NOW CLICK ONTO THE FILE BUTTON (TOP LEFT HAND CORNER) AND THEN EXIT (OR CLICK ONTO THE CROSS ON THE TOP RIGHT TO EXIT)



THERE ARE MANY DIFFERENT REPORTS THAT YOU CAN TRY TO CHANGE.

The image displays four different report templates generated by the software:

- PURCHASE ORDER:** This report includes a header with company logos (comar, AXIN, DUCO, and a green leaf logo), a table of items with columns for Part Number, Description, Length, and Unit Price, and a summary section at the bottom.
- DELIVERY / INSTALLATION:** This report shows a detailed layout of a window or door assembly with dimensions and a list of components and their quantities.
- REDUCED FABRICATION LIST:** This report provides a detailed list of components, their dimensions, and their quantities, organized in a table format.

PRESENTATION REPORTS

THE PRESENTATION REPORTS IN GENESIS ARE INBUILT AND MODIFIED WITHIN THE SOFTWARE, THEY ARE BUILT INHOUSE BY COMAR

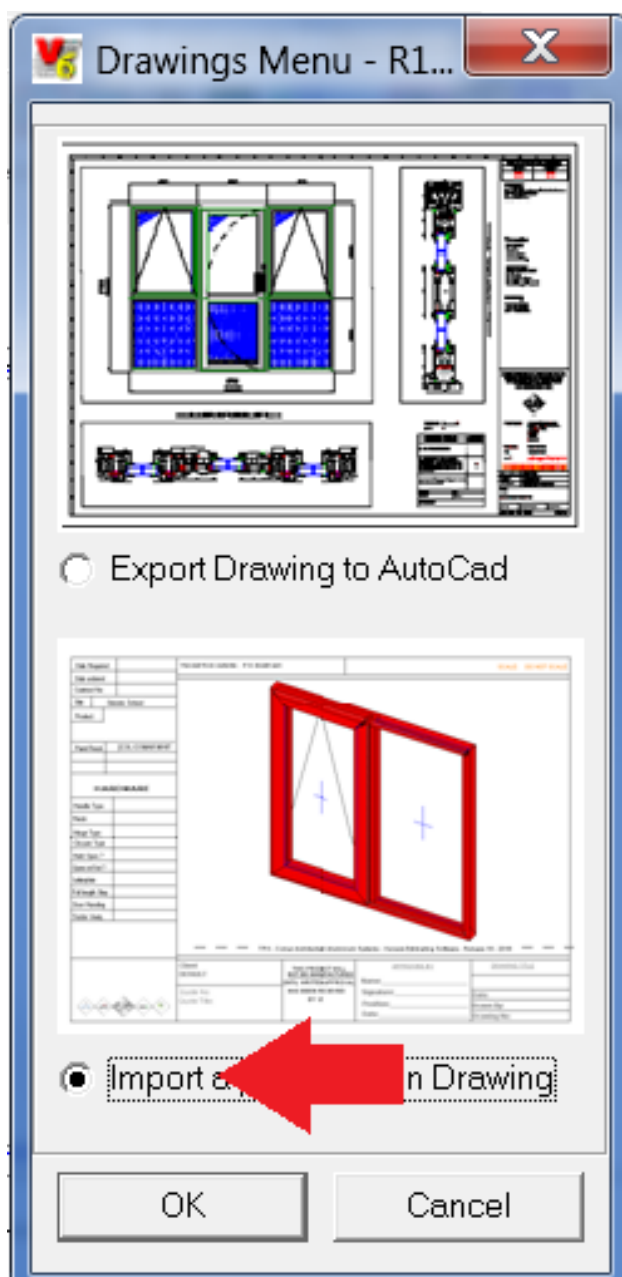
THEY ARE ALL ACCESSIBLE USING THE FOLLOWING BUTTON AT THE TOP OF GENESIS AND IS ONLY AVAILABLE WITH A QUOTE OPEN AND WITH A FRAME INSIDE A QUOTE HIGHLIGHTED



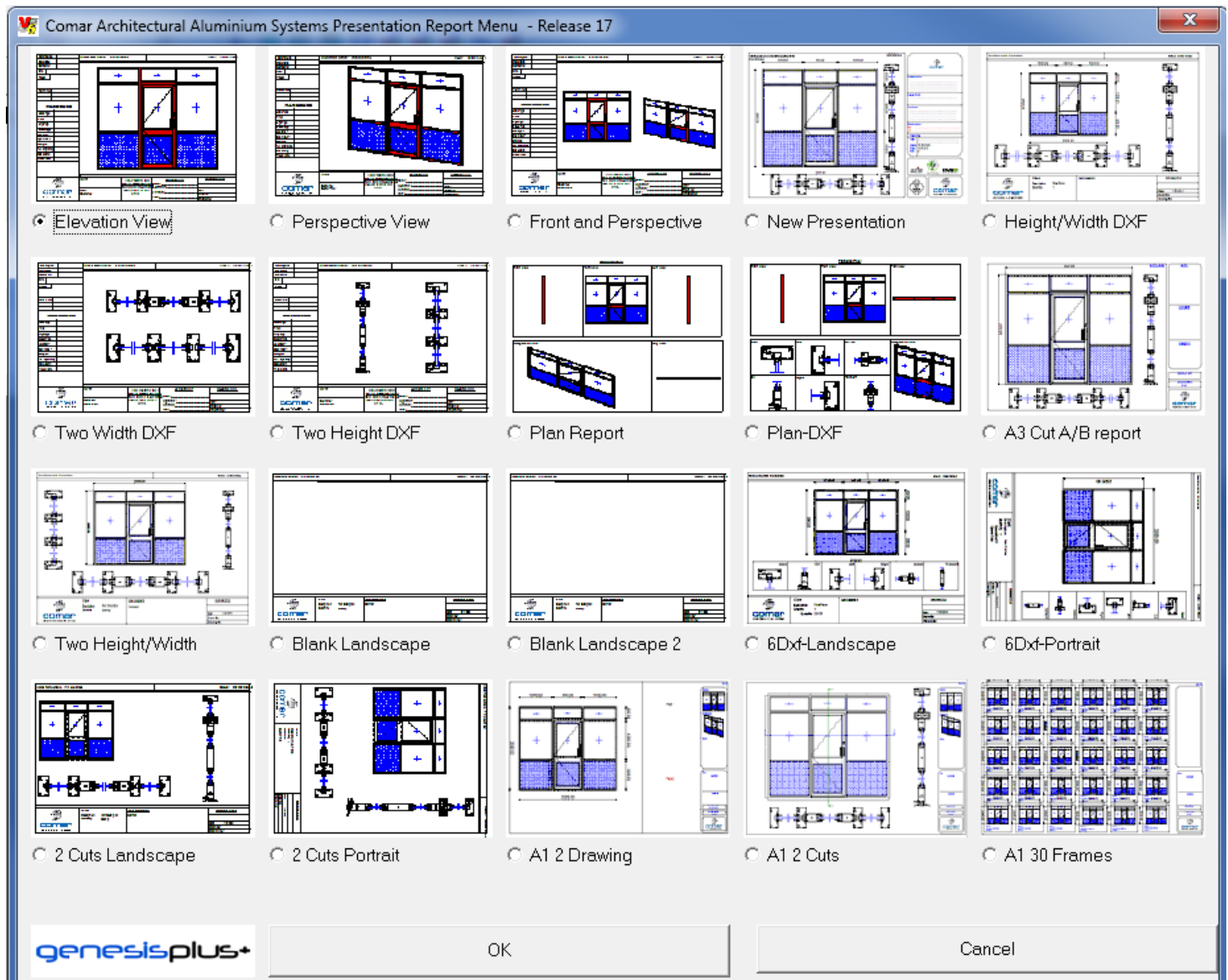
TO START WITH , OPEN A QUOTE AND HIGHLIGHT ONE OF THE FRAMES AND THEN CLICK ONTO THE FOLLOWING BUTTON



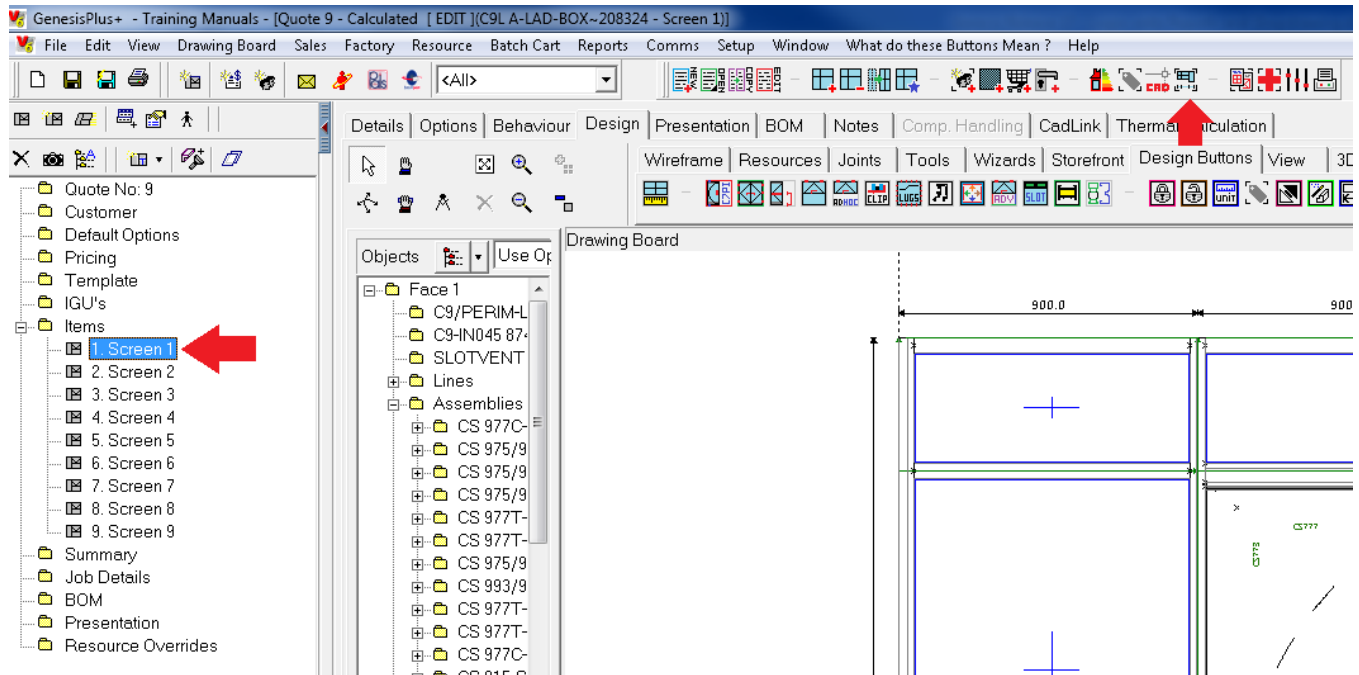
THERE WILL BE A SUB MENU APPEAR, CHOOSE THE “IMPORT A PRESENTATION DRAWING” BUTTON



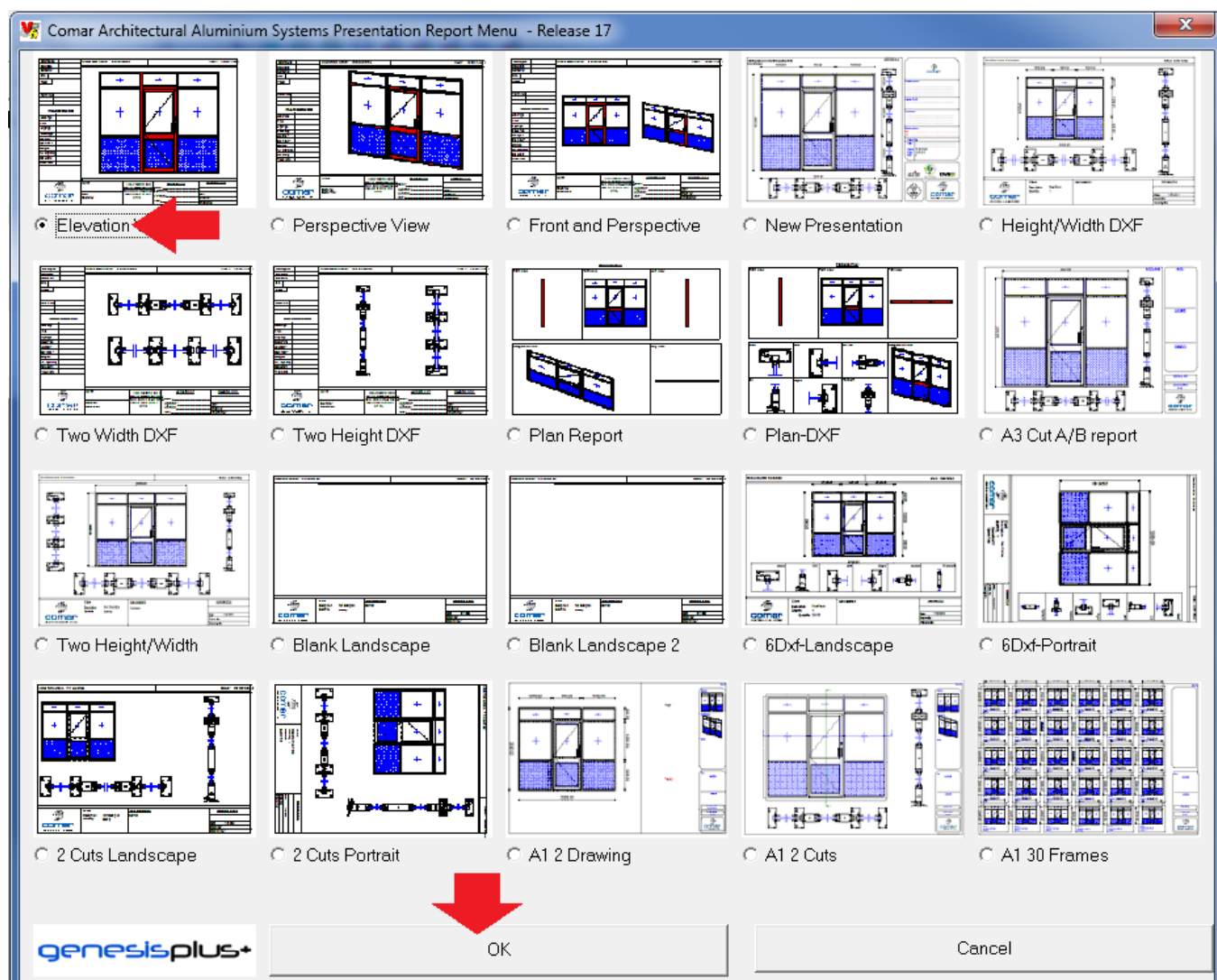
THE FOLLOWING MENU WILL APPEAR, THESE ARE STANDARD PRESENTATION REPORTS THAT WE HAVE DESIGNED ALREADY. ALTHOUGH THEY CAN BE MODIFIED THE REPORT MACRO BELOW WILL ONLY LIKE TO THE SET AMOUNT OF REPORTS THAT WE HAVE WRITTEN. HOWEVER ONCE WITHIN THE PRESENTATION SCREEN YOU CAN SAVE AS MANY VERSIONS OF THE REPORTS THAT YOU WISH AND USE ANOTHER BUTTON TO REFINED THEM REPORTS MANUALLY (NOT USING THE ABOVE BUTTON OR BELOW MACRO.



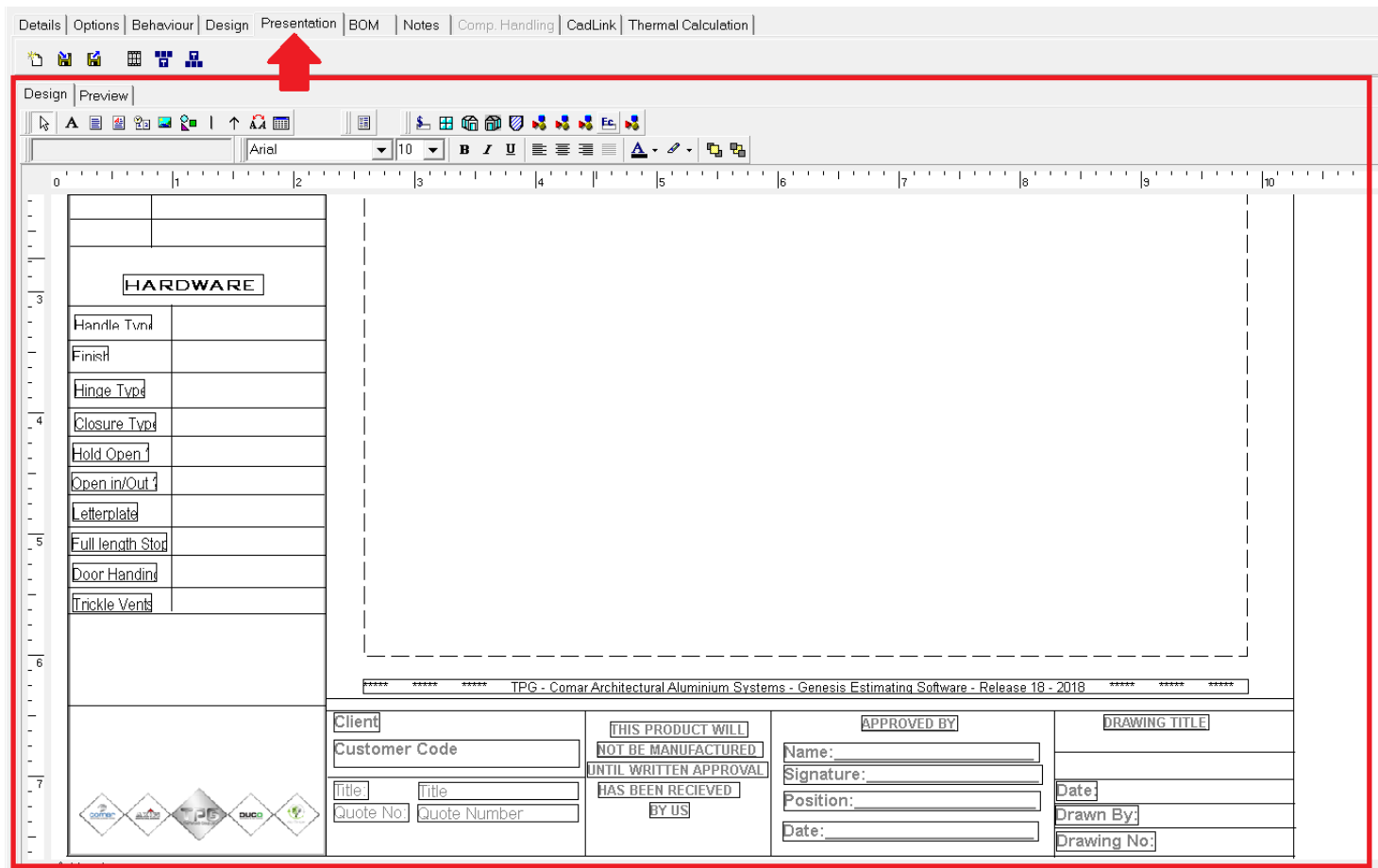
ONCE YOU HAVE HIGHLIGHTED A FRAME WITHIN THE QUOTE CLICK ONTO THIS BUTTON (IF YOU HAVENT ALREADY DONE SO



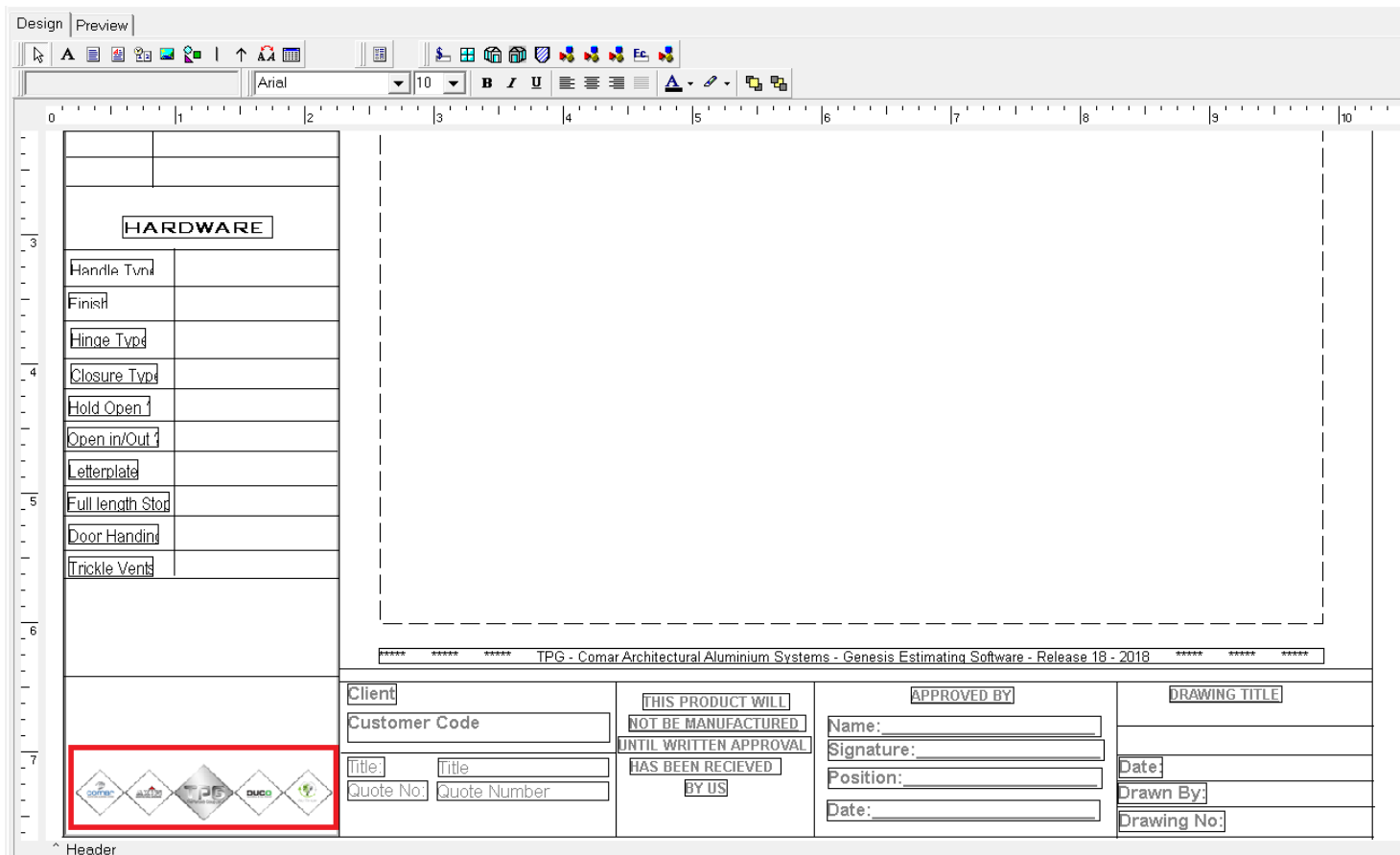
AND CHOOSE THE FIRST CLICK BUTTON AS SHOWN BELOW, FOLLOWED BY THE OK BUTTON



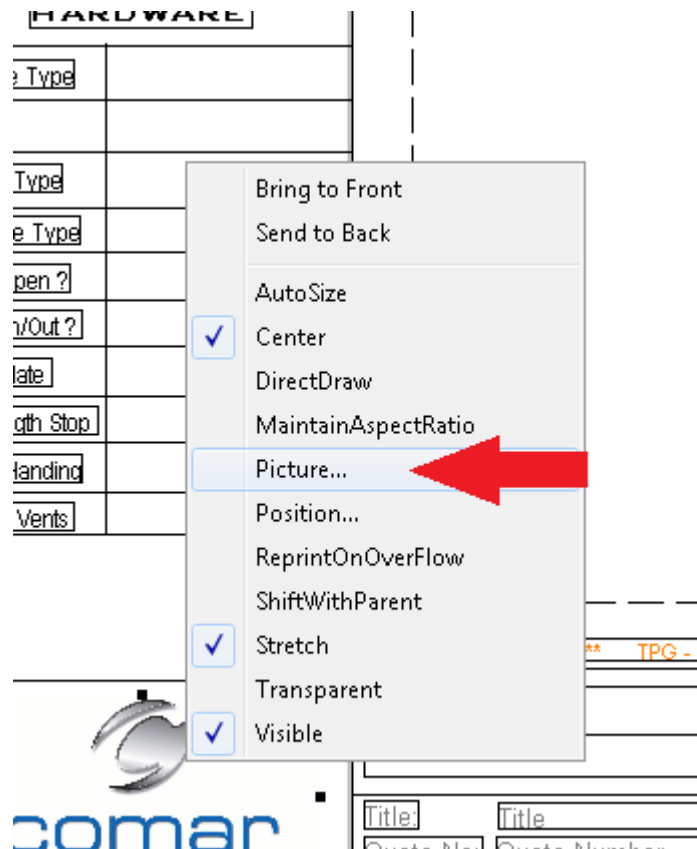
THE MACRO FLICKS TO THE TAB CALLED PRESENTATION AND IT LOADS UP THE PRESENTATION DRAWING THAT WE LOADED VIA THE MACRO



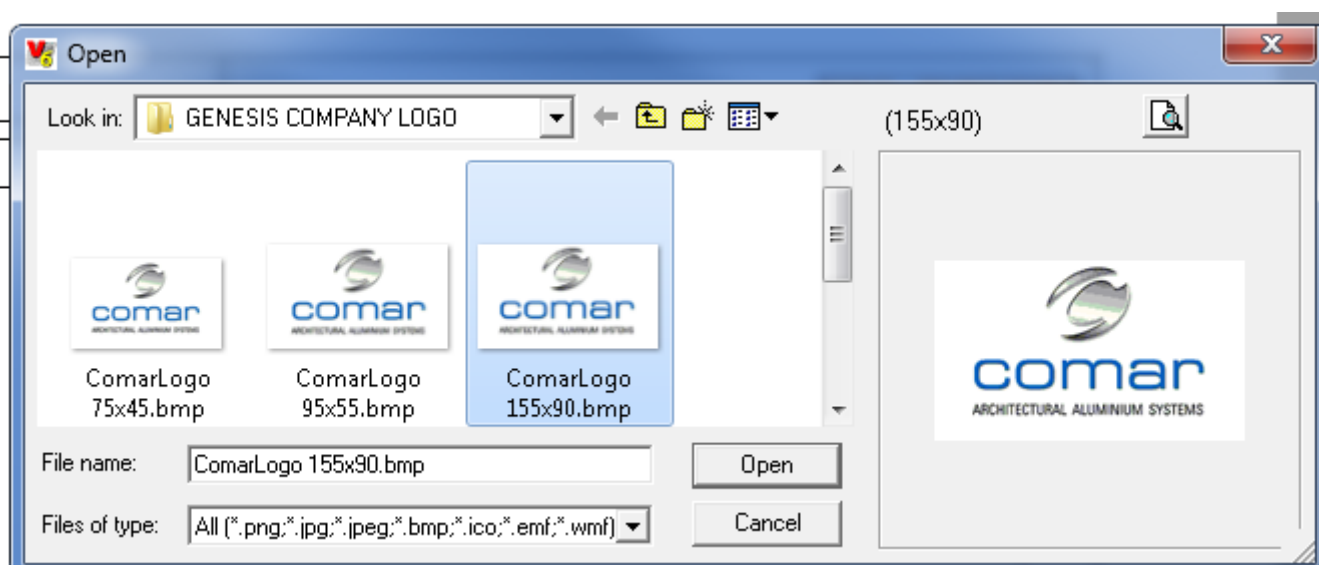
FIRST OF ALL WE WILL CHANGE THE LOGO. HIGHLIGHT THE COMAR LOGO THAT IS ALREADY THERE



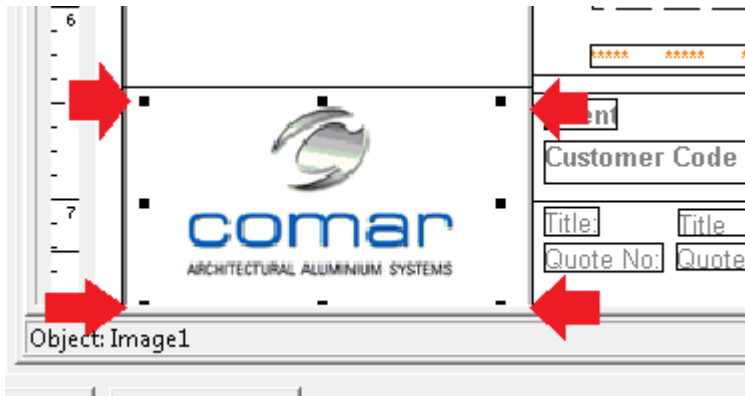
ONCE HIGHLIGHTED RIGHT CLICK ON IT. NOW GO PICTURE



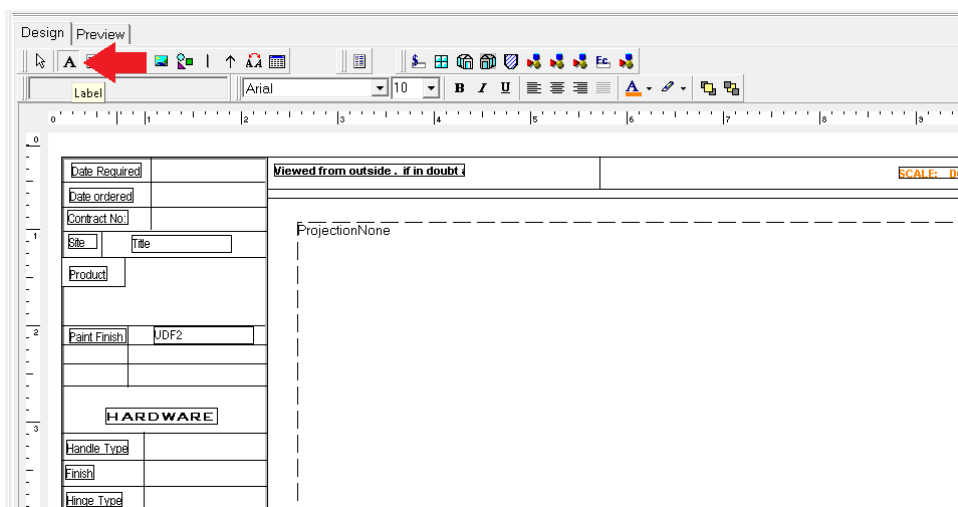
LIKE YOU DID BEFORE FIND THE LOGO AND FIND ONE THAT YOU WOULD LIKE TO USE (AGAIN USING A .BMP FORMAT). CLICK OPEN WHEN YOU HAVE FOUND ONE



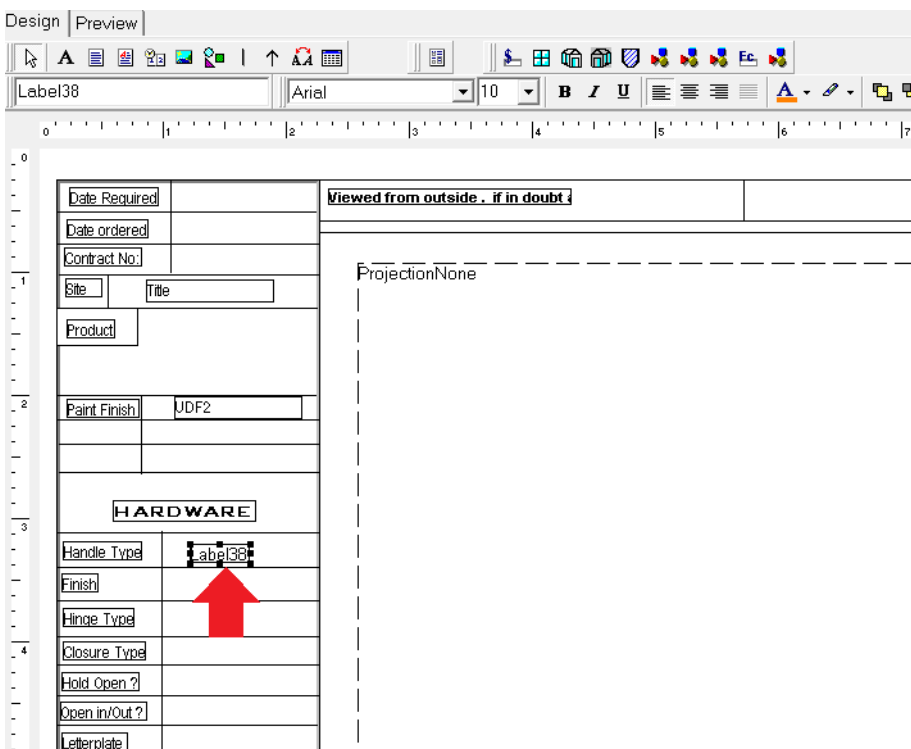
LIKE BEFORE YOU CAN USE THE POINTS AROUND THE NEW LOGO TO ADJUST THE SIZE. IF YOU CANNOT ADJUST IT TO A SIZE THAT YOU LIKE CONSIDER CREATING A DIFFERENT SIZED ONE FIRST BEFORE IMPORTING IT



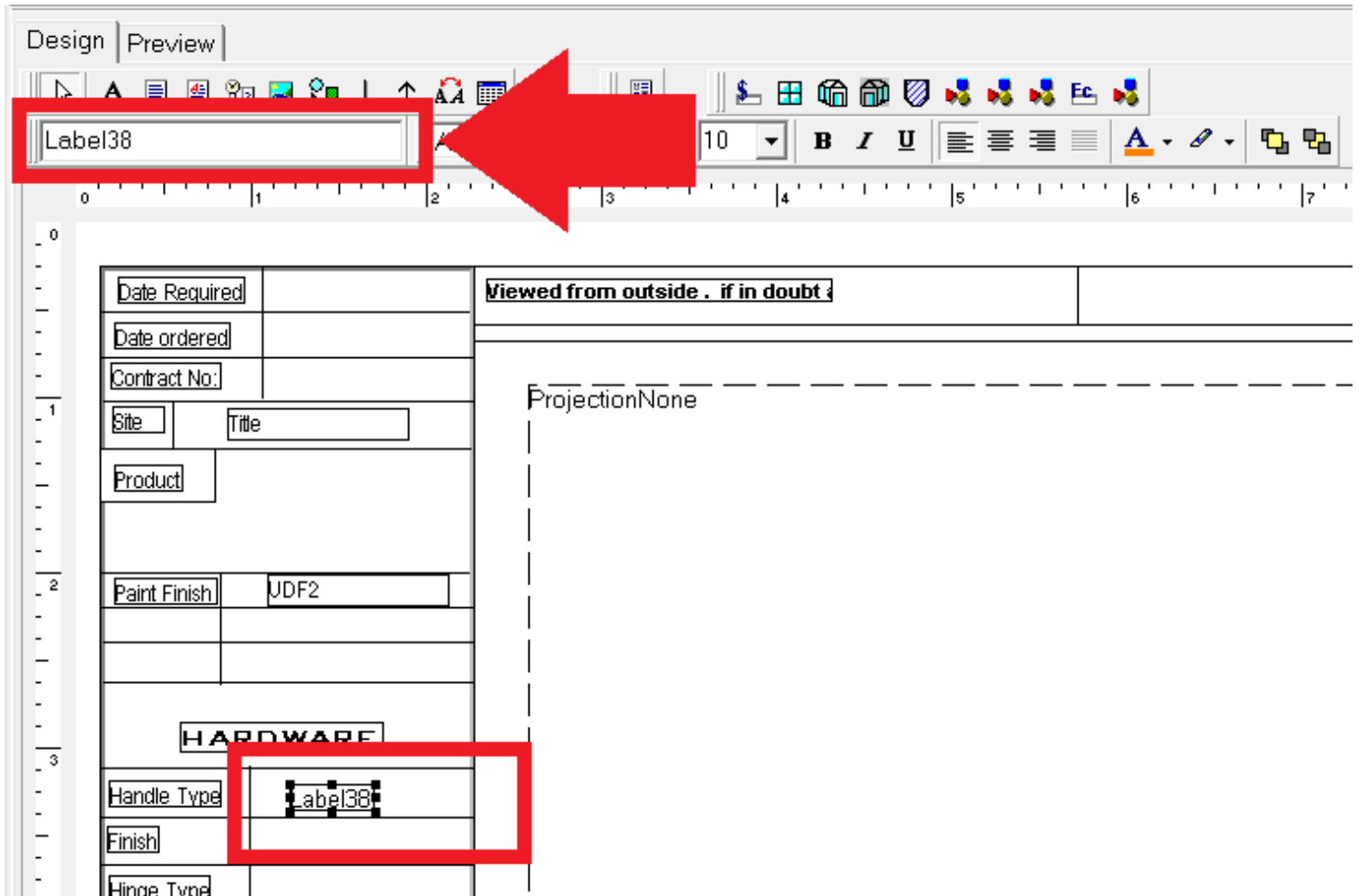
WE WILL NOW TRY ADDING A TEXT BOX INTO THE REPORT. FIND THE TEXT BOX BUTTON AS SHOWN BELOW



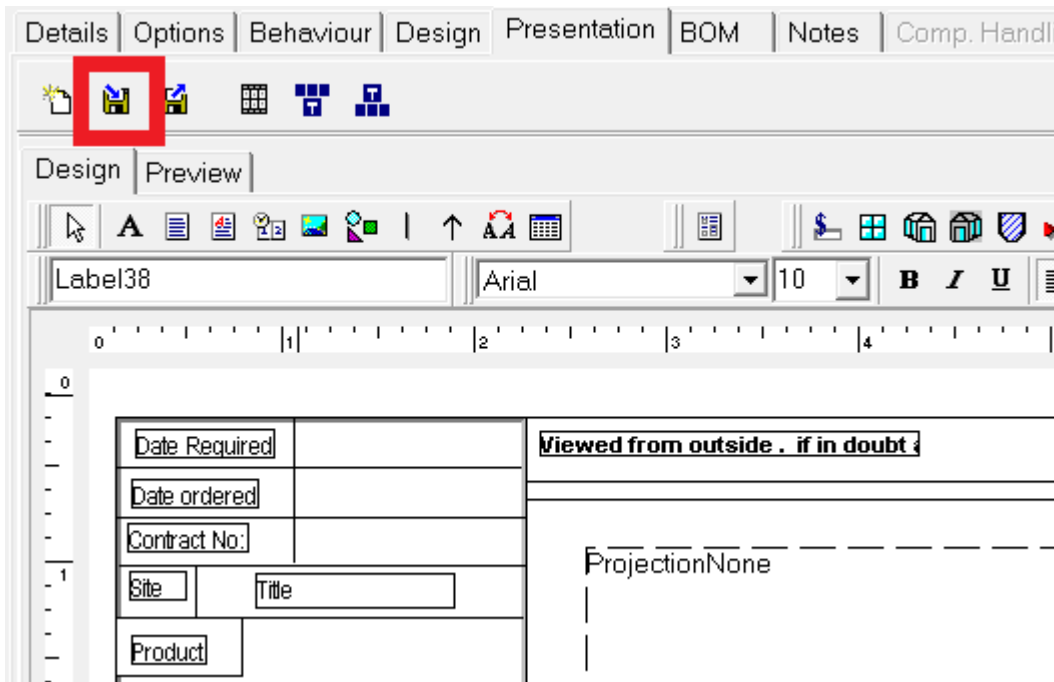
USING YOUR MOUSE ROUGHLY CHOOSE WHERE YOU WOULD LIKE TO PLACE THE NEW TEXT BOX AND DOUBLE CLICK YOUR MOUSE



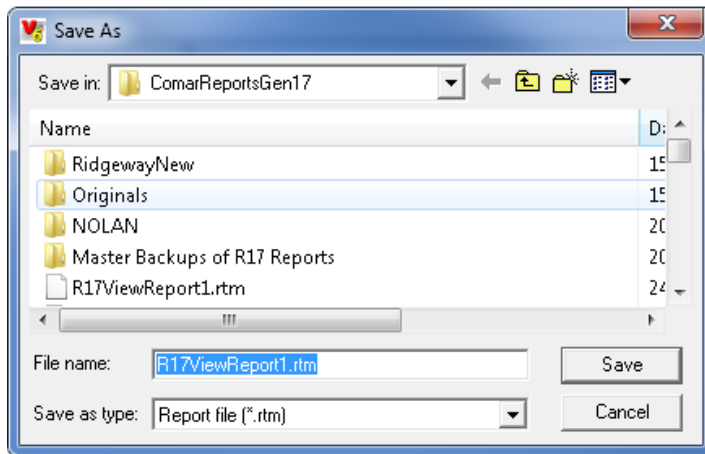
YOU CAN CHANGE WHAT IS IN THE TEXT BOX AS SHOWN BY THE ARROW BELOW. TYPE SOMETHING ELSE IN



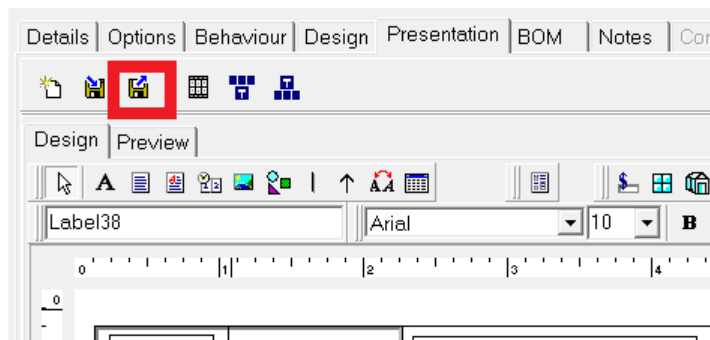
ONCE YOU HAVE FINISHED MODIFYING THIS REPORT YOU CAN CLICK THE SAVE BUTTON SO THAT THIS MODIFICATION ALWAYS COMES UP.



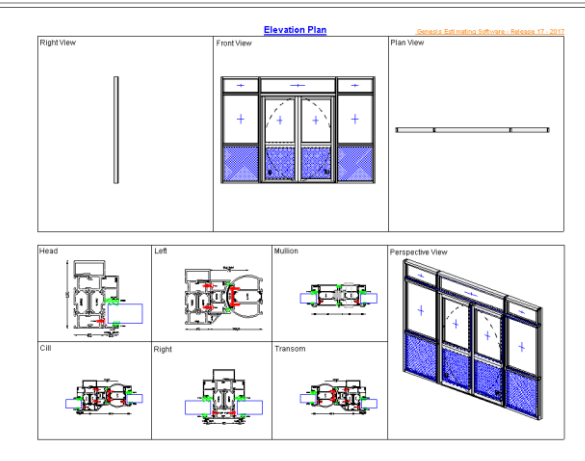
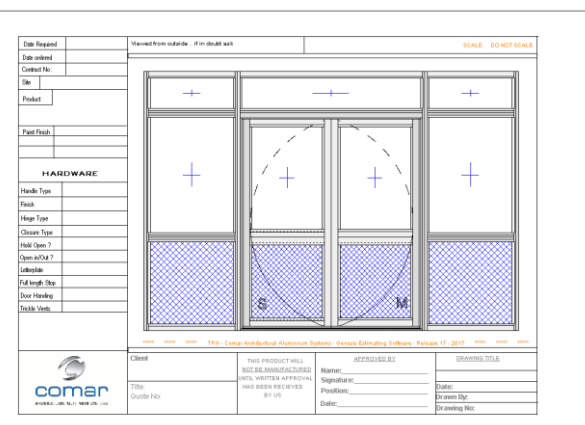
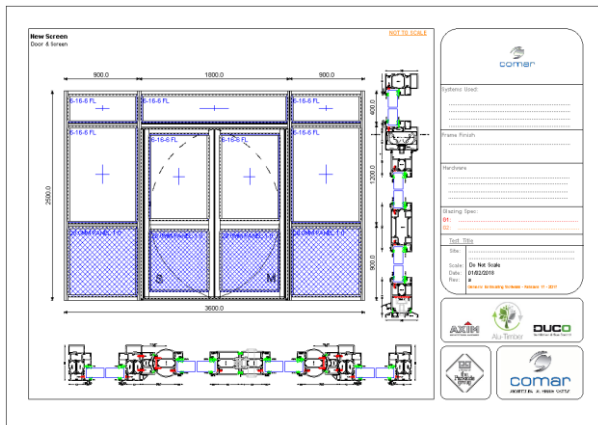
IF YOU WANT THE MACRO TO BRING UP THIS REPORT THEN DO NOT CHANGE THE FOLDER OR THE REPORT NAME.



ALTERNATIVELY YOU CAN SAVE THE REPORT TO YOUR OWN FOLDER AND USING THIS OPEN BUTTON YOU CAN MANUALLY OPEN YOUR OWN ONE BACK UP BY FINDING THE FILE



THERE ARE MANY REPORTS THAT YOU CAN CHANGE. THERE IS ANOTHER MANUAL AVAILABLE TO SHOW YOU HOW TO USE THESE REPORTS AND HOW TO ADD CAD DRAWINGS



AUTOSHOP DRAWINGS

THE LAST CUSTOMISABLE REPORT EXPORT WILL BE THE CAD DRAWINGS, THESE WILL REQUIRE YOU TO HAVE A CAD PROGRAM TO CUSTOMISE THEM SO WE CANNOT REALLY GIVE INSTRUCTIONS ON HOW TO MODIFY THEM.

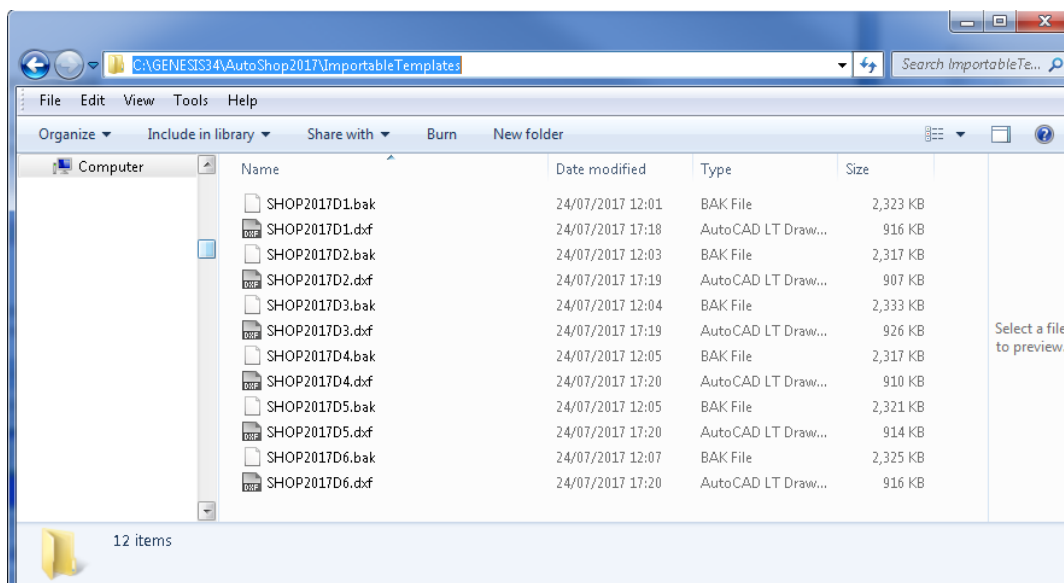
THEY ARE LOADED USING THE BELOW BUTTON



WE CURRENTLY HAVE 6 TEMPLATES WITHIN THE MENU, BUT YOU MAY BE ABLE TO REQUEST US TO EXPAND THESE SHOULD YOU WISH TO HAVE MORE OPTIONS

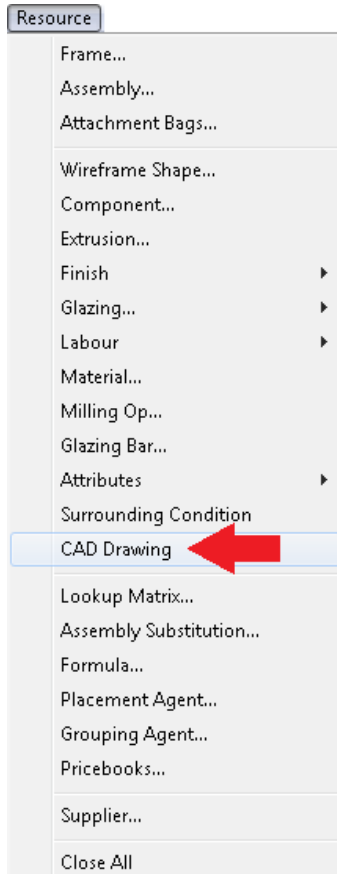


THE STANDARD TEMPLATES ARE LOCATED IN THE FOLLOWING FOLDER. HOWEVER THEY ARE NOT STORED EXTERNALLY THEY HAVE TO BE IMPORTED ONCE MODIFIED. PLEASE OPEN THE .DXF FILE OF EACH TYPE WITHIN CAD AND ONCE MODIFIED SAVE THEM AS THE SAME NAME WITHIN THE SAME FOLDER (AS .DXF)

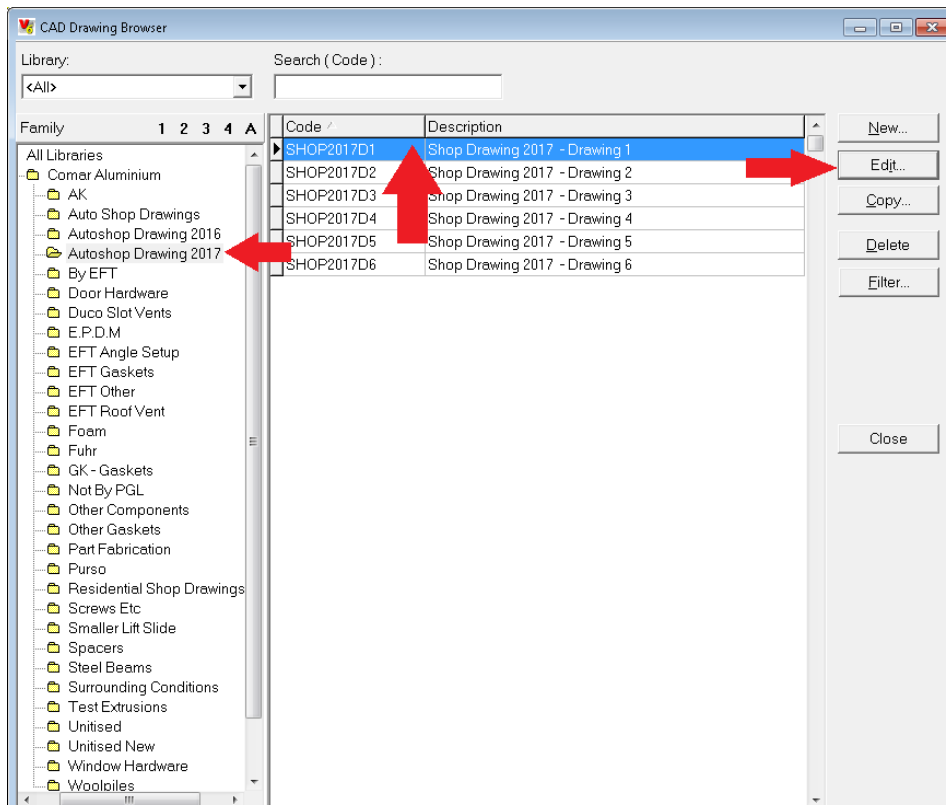


ONCE THE LOGO HAS BEEN ADDED TO THE REPORTS YOU MAY IMPORT THEM BACK IN.

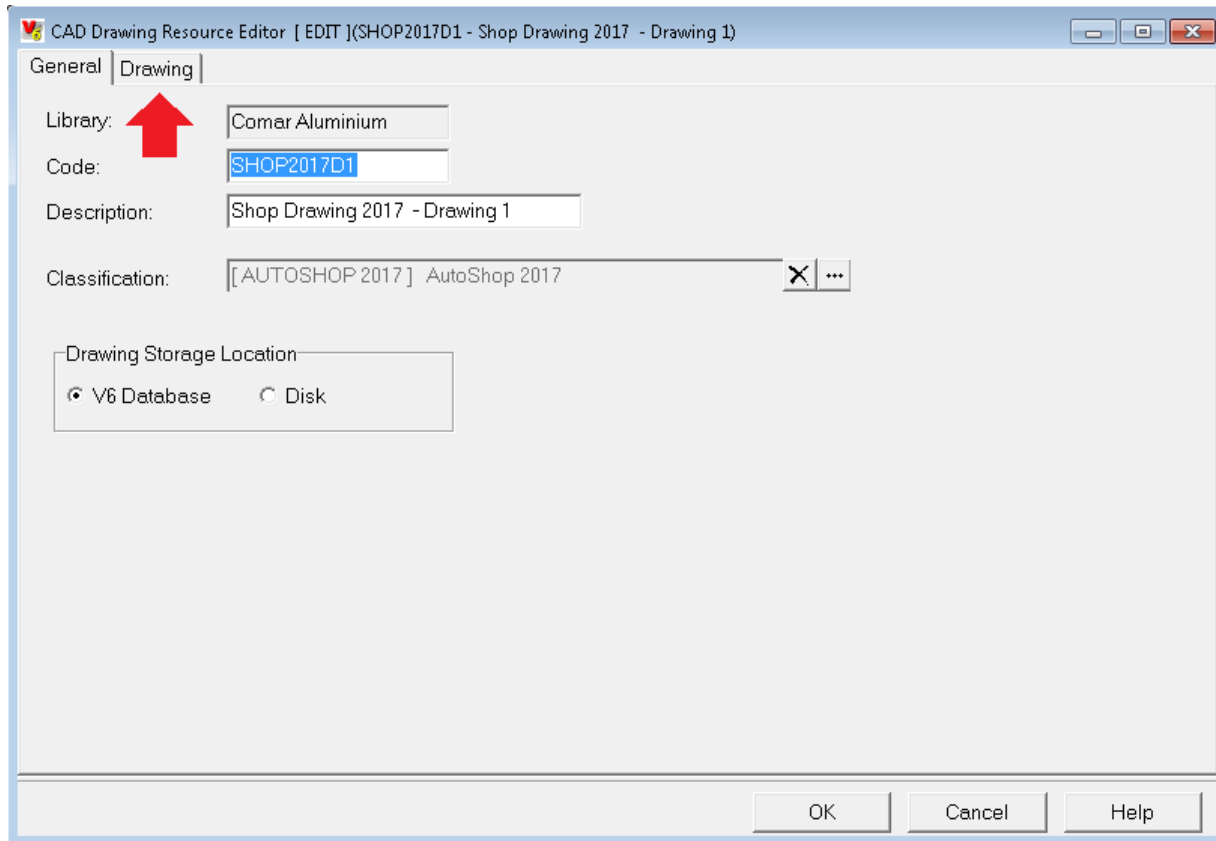
TO DO THIS GO TO RESOURCE AT THE TOP OF THE GENESIS SCREEN AND THEN GO DOWN TO CAD DRAWING (YOU DO NOT NEED TO HAVE A QUOTE OR A FRAME OPEN TO DO THIS)



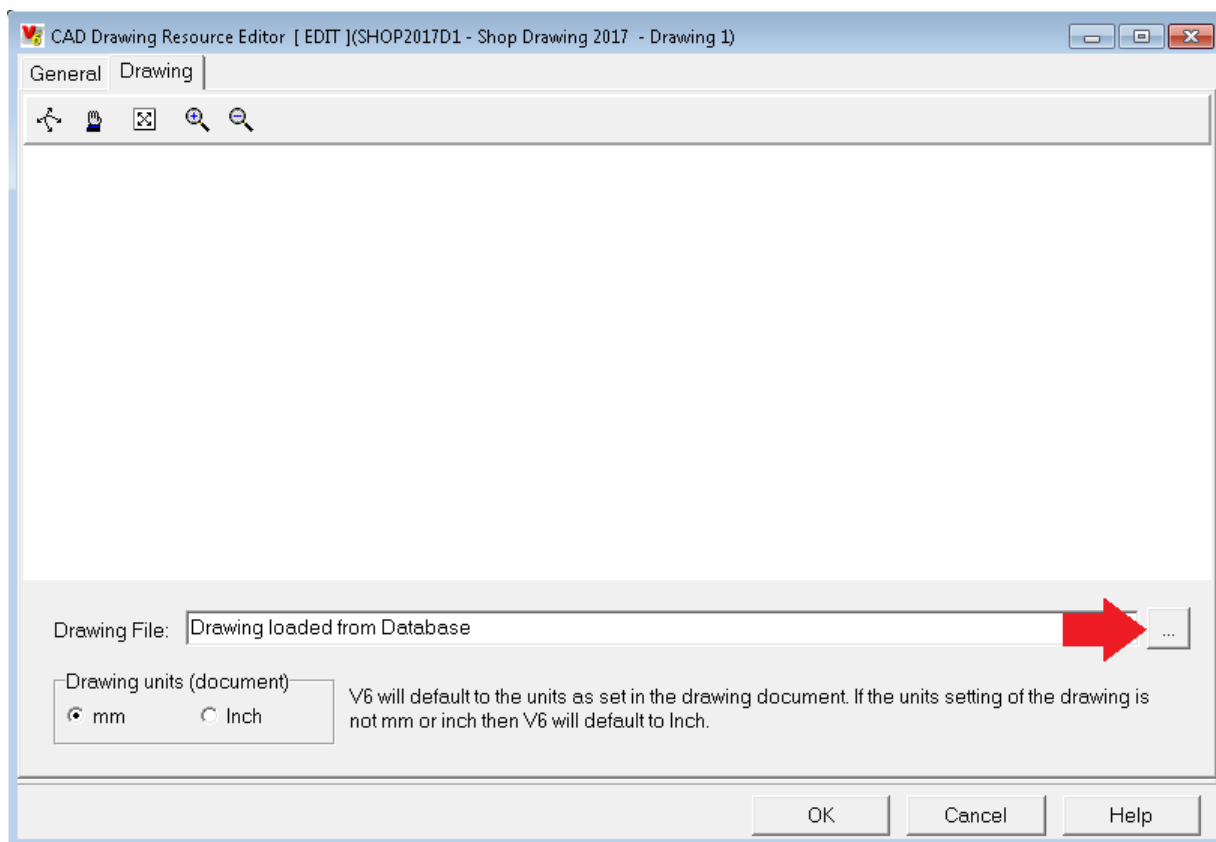
IN THE LEFT HAND FOLDER FIND “AUTOSHOP DRAWING 2017” AND THEN CLICK ONTO “SHOP2017D1” ON THE RIGHT HAND SIDE AND CLICK ONTO ‘EDIT’.



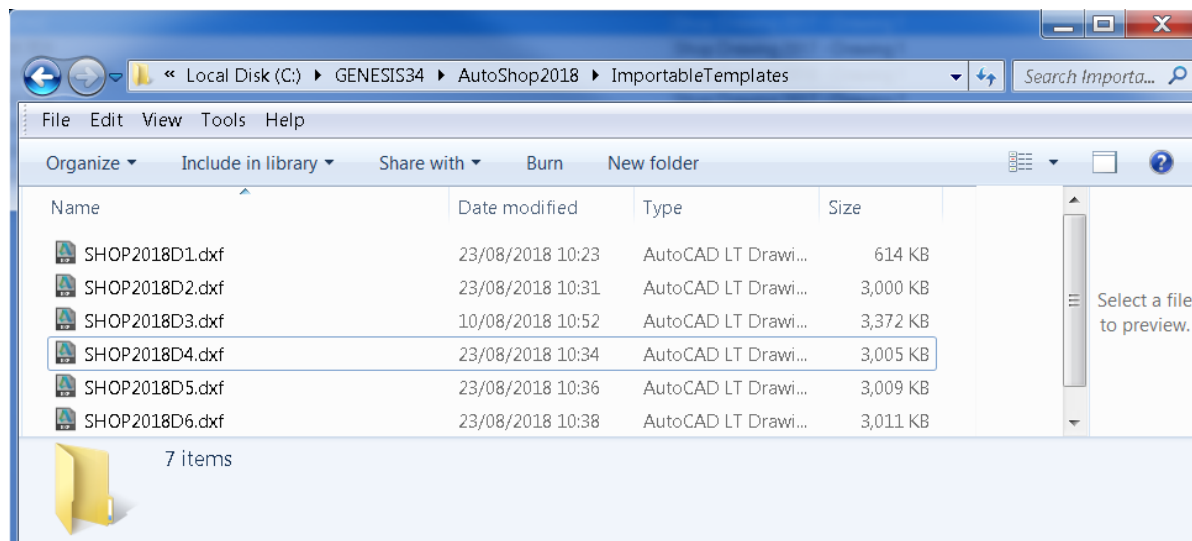
WHEN THE BELOW SCREEN COMES UP GO TO DRAWING



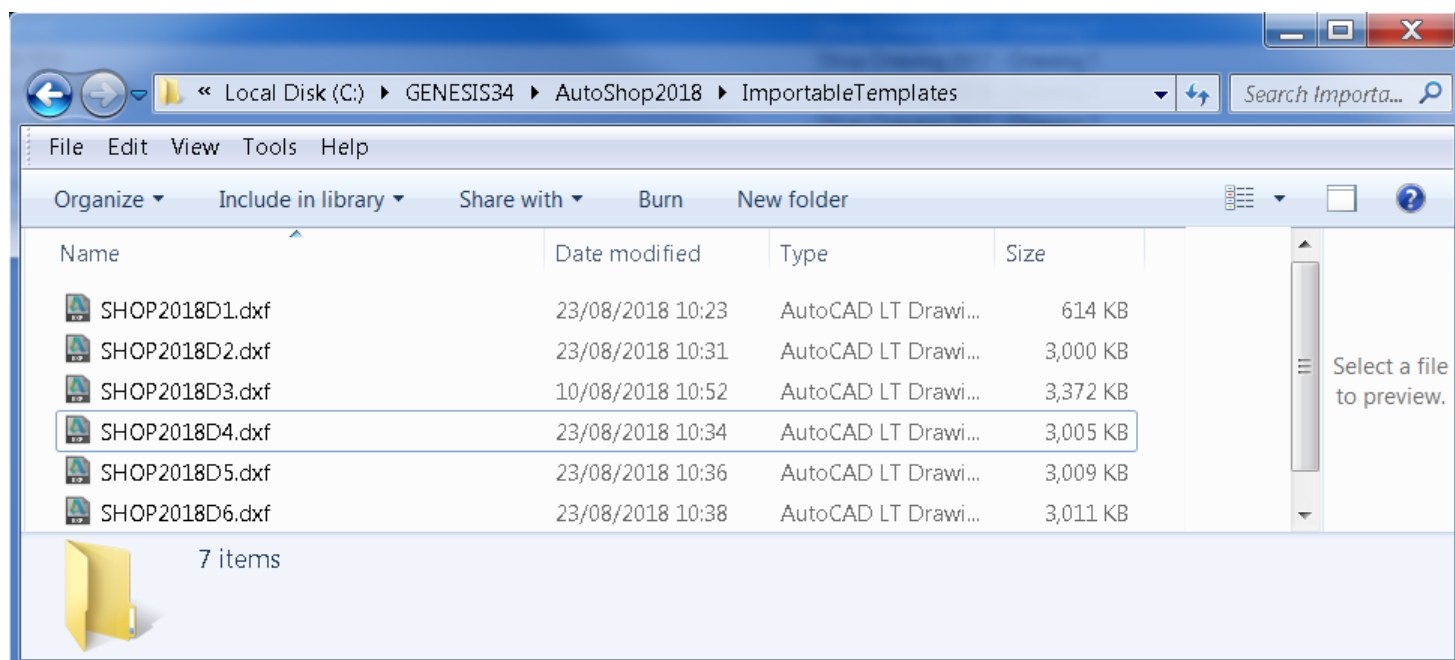
NOW CLICK ONTO THE SEARCH BOX BELOW



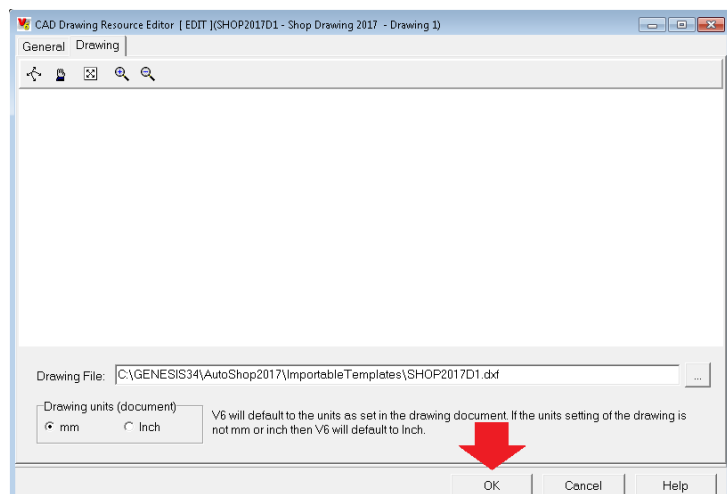
FIND THE FOLDER C:\AUTOSHOP2018\IMPORTABLE TEMPLATES (DEPENDING ON WHICH VERSION YOU HAVE)



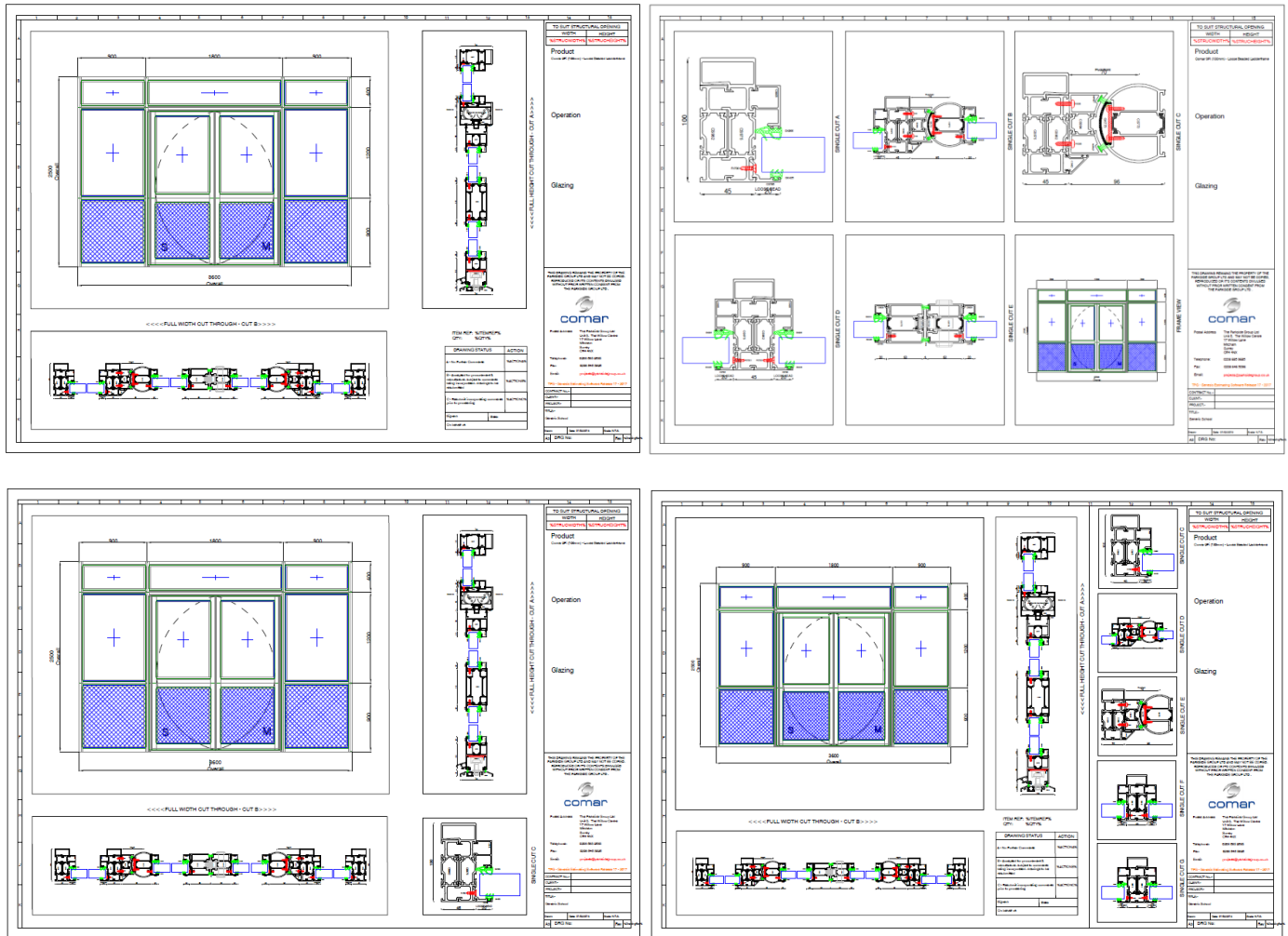
AS WE ARE IMPORTING SHOP2018D1 WE NEED TO IMPORT THEM IN THE CORRECT ORDER OTHERWISE THE MACRO PICTURES IN THE MENU WOULD BE CONFUSING. CHOOSE THE CORRECT ONE BELOW AND CLICK OPEN TO IMPORT IT



ONCE COMPLETE CLICK OK TO SAVE IT



THERE ARE MANY DIFFERENT TEMPLATES (6 IN TOTAL), EACH ONE HAS A DIFFERENT NUMBER OF CAD DRAWINGS AND A SET NUMBER AND ORDER OF CUT THROUGHS.



THIS MANUAL SHOULD SHOW YOU SOME SIMPLE MODIFICATIONS WHICH ARE AVAILABLE FOR ANYONE WHO HAS THE DESIRE TO MAKE CHANGES AND MODIFY THE REPORTS TO MATCH YOUR OWN CORPORATE IMAGE.

IF YOU REQUIRE ANY FURTHER HELP WITH ANYTHING THAT YOU HAVE SEEN, OR DO NOT HAVE CAD BUT WOULD LIKE US TO ADD THE LOGOS FOR YOU, PLEASE CONTACT SIMON HARVEY USING THE BELOW CONTACT DETAILS

SIMON HARVEY
 TECHNICAL SERVICES MANAGER
SIMONH@PARKSIDEGROUP.CO.UK
 TEL: 0208 685 2312
 MOBILE: 07714 521265