GLAZING IN THE CLOUD

Getting Started Guide

Contact details:

Suite 3/ 165 High Street, Belmont VIC 3216

P: +61 3 5245 8954

E: info@inmatic.com

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1. Sign Up

- Go to ww.kico.com
- Select Sign up/ Login
- Select Sign up for 2 months Free subscription
  All the boxes are ticked for you. Try it all, you can untick boxes later for options you don't want.
- Enter your name, email, password and company name.
- You will receive an email to complete the sign up process

2. Set Up Your Company

- Go to ww.kico.com
- Select Sign up/ Login and log in
- Go to Settings/Company Details
- Enter your details there
- Browse for a logo for your personalised web site. You can upload jpg, png, and gif formats.
  If you don't have a logo at hand, for a quick start we recommend to scan the letterhead of your stationery and crop the logo from there. You will need the whole letterhead as well for your quotes, invoices and delivery dockets. You can care about perfection later.
- Click Save to save your changes. Your logo will now appear on the top left of your KicoGlass site.

3. Set Up Your Print Settings

- Go to Settings/Printout Settings
- Enter your bank details (or leave blank for now)
- Browse for a picture for your letterheads. You can upload jpg, png, and gif formats.
  For a quick start we recommend to scan the letterhead of your stationery.
  Browse for a logo for your labels or leave blank for now.
- Click Save to save your changes.

4. Other Settings

Your email settings are auto- generated and you will not need any other settings for a quick start. You can set up more users later and check out all the other settings later as well, it is all straight forward and easy to understand.

5. Adding Customers

Go to Customers / Customer List
You will see the following screen:
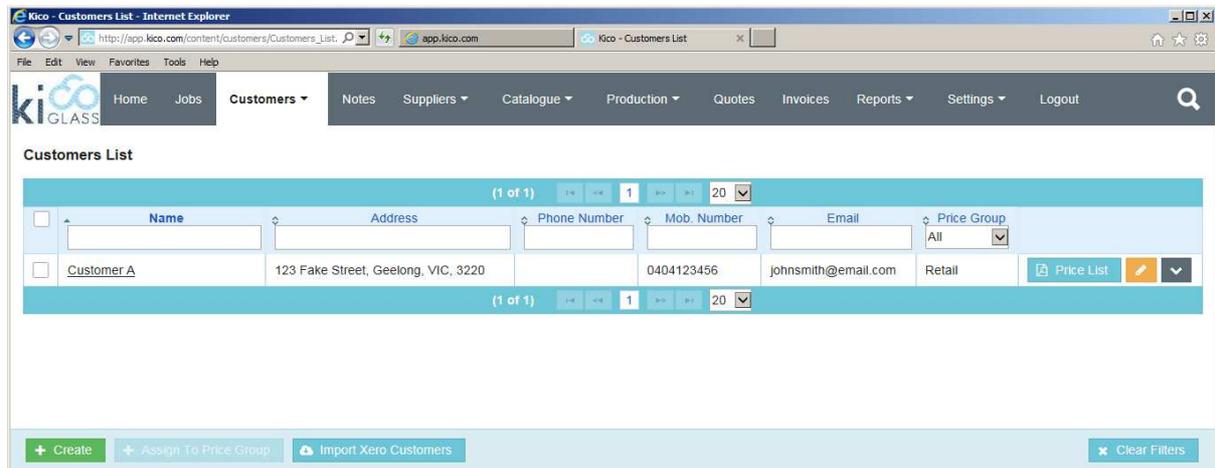
To have something to start with, the system has generated a fake customer for you. You can edit that entry by clicking on the edit button (orange pencil) on that line, or you can add real customers by clicking on the green create button at the bottom left.

The layout you see here is the general layout for tables throughout Kico. At the top of the table there are entry fields that provide the filter for searching the table for the specifics you entered there. At the right of every entry there are buttons to process that specific entry. The pencil indicates editing, the down arrow opens a menu with more functions. Other buttons are specific to the list displayed and usually self-explanatory.

At the bottom of the table there are usually the create and the clear filters buttons, others are again specific to the table displayed and some only become active after selecting one or more entries of the table by ticking the box on the left.

When clicking Create, the customer entry dialog will pop up for you to enter a new customer:
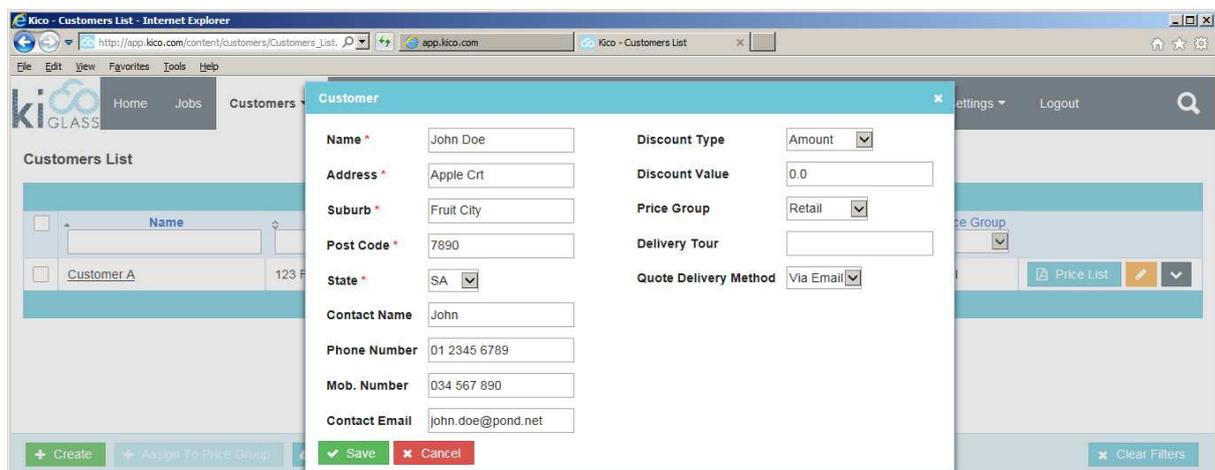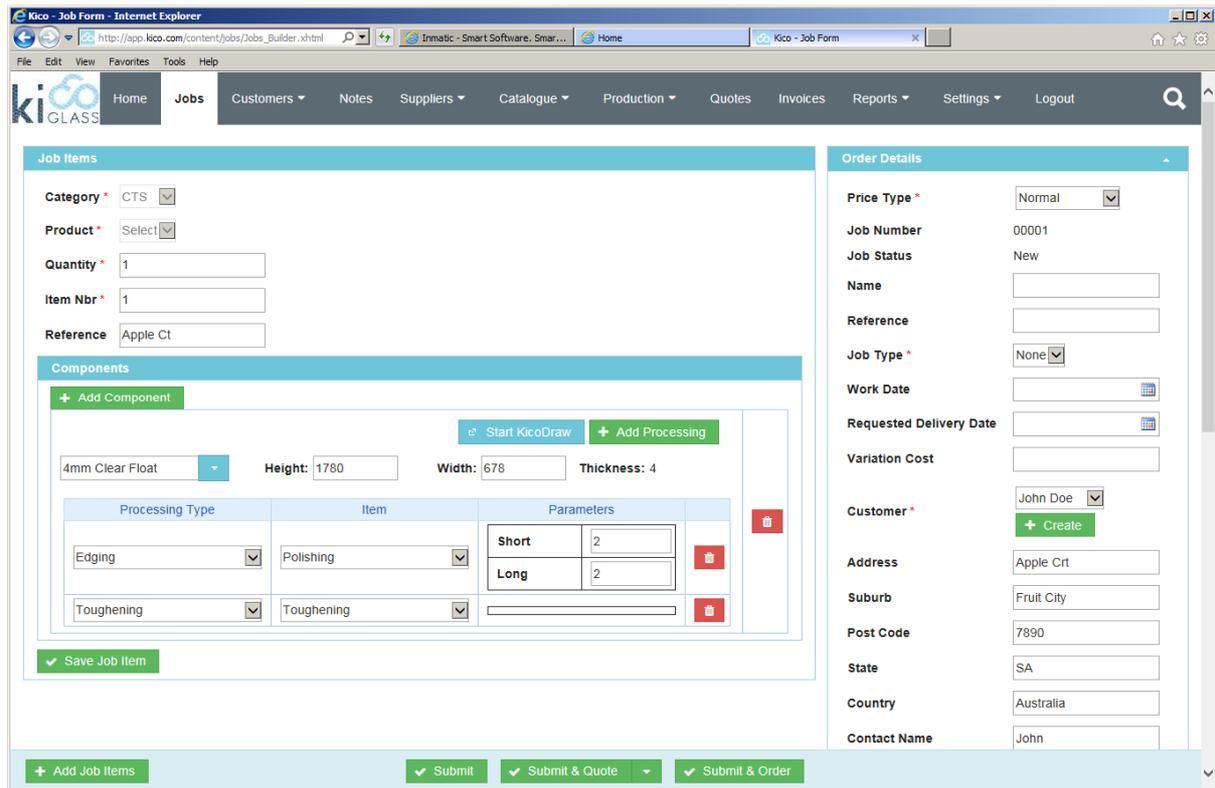

Please make sure to select the correct customer type, discount (if any) and preferred communication method.

6. Entering Orders

Having customers and a few predefined products now, you can enter your first order. In the menu click on jobs. At the start, the list of jobs will be empty. Just click on create to enter your first order.

For a start we selected cut to size (CTS) as a category, picked 4mm float as the glass type and added polishing an toughening as processing steps. This then looks like this:

As you can see on the right, we picked a customer as well and his details were filled into the fields on the right. However, if it is an over the counter prepaid sale, then you can pick cash as well and you can still enter all the fields for example for later delivery.

 You can give the order a name and a reference text or number as well. If it is a B2B type of sale, then the customer might have given you their customer reference with every ordered item as well. In that case you can fill in his reference with every job item too.

After saving the job item, when scrolling down you can see on the right your job item with its price as well. If you add more job items, they will all be shown in that summary.

Please be aware that we just plucked some pricing figures out of thin air for a few materials and processing types, so you can have a quick play and see how this is supposed to work. If you want to do serious business with KicoGlass you will have to set up all your products and processing together with pricing.

You can open the tabs for materials and processing as well to see all the pricing details. This will then look as follows:

You can predefine more complex products from their components. Most will have some processing attached, and we will extend the list of such products in the future. Currently we can do the calculations for IGU's and there are some predefined on the system.

If you add a second job item, select IGU and a product, then you will see something like that:

If you enter height and width of your IGU, the size fields of the components below will be populated automatically.

You can set up a product as expandable, meaning you can add more parts and for example create a triple glazed unit, or in our case you can still change the glass types, spacer material and you can add processing, for example toughening to the glass pieces.

This means that pricing runs over the components, but you can give prices to predefined product as well, which will mean you can't change anything except size.

If you have a non-rectangular shape or a cut out, you can define that as well. Just click on "Start KicoDraw" and you change into drawing mode. If you have already entered a rectangular piece with it's size, then that will be loaded, and using the tools in KicoDraw you can modify that or enter a cut out or start from scratch by drawing a shape picking one from the catalogue and then enter measurements.

To learn how to use KicoDraw, please watch the videos on the kico web site. To keep it simple, if you just want to pass the customer's drawing into production, then you can select the processing type Cutout as well for an order item in order to get the pricing right.

One you have finalised all entries for your quote, you can either just submit it, meaning it goes into pending state on the database, or you can submit and quote, in which case it goes to quoted. The last option is submit and order, meaning it goes to the ordered state and will now be ready for production.

If you submit and quote you have the option to quote per email or snail mail. If you make no selection it will use the default you have set for that customer. If you selected "Via Post" it will generate a pdf for you to download. If you want to send by email, please make sure you have a valid email address of your customer. The system will send the email to that address, with a default message that you can set up in the email settings.

If you quote and invoice per email, you will net get any information back other than that the status of the job has changed. Initially it might thus be a good idea to either download the pdf and email manually to your customer, or to send to the customer and later verify with him that the quote was received. We plan to send an email verification email to the customer when it is set up initially, to make sure the email is correct. If your customer confirms, we then know we can send quotes and orders in the future per email.

If you submitted the job without quoting, then you can go into the jobs list later and tick the jobs you want to quote. From there you can quote multiple jobs for the same customer. Thus, as long as you tick jobs for the same customer, the quote button at the bottom will stay active. You can work this way as well, if you want to email some special text to the customer or change the email address, as the following dialog will give you the opportunity to change that.

When you get an order from your customers, you can go back to the jobs list and set that job to ordered by ticking the green button. Furthermore, jobs that have been ordered can be invoiced there as well. This suit smaller manufacturers that do not want to run the acceptance process over the system. If you have advanced manufacturing support, then jobs will change state to delivered when the delivery docket is produced and once you have the paperwork from delivery back you can go through the acceptance process and generate invoices from there.

Once you have entered a few jobs, quotes, orders and invoices, your home screen will start to populate. You can see your quotes, i.e. those not yet sent and those not yet accepted, you can see your jobs processing and those ready to deliver, the invoices ready to be sent and those not paid yet, and you can see your stock and your supplier orders as well.

The calendar overview will show you the delivery dates of the jobs, and the open invoices with their due dates and highlighting those overdue.
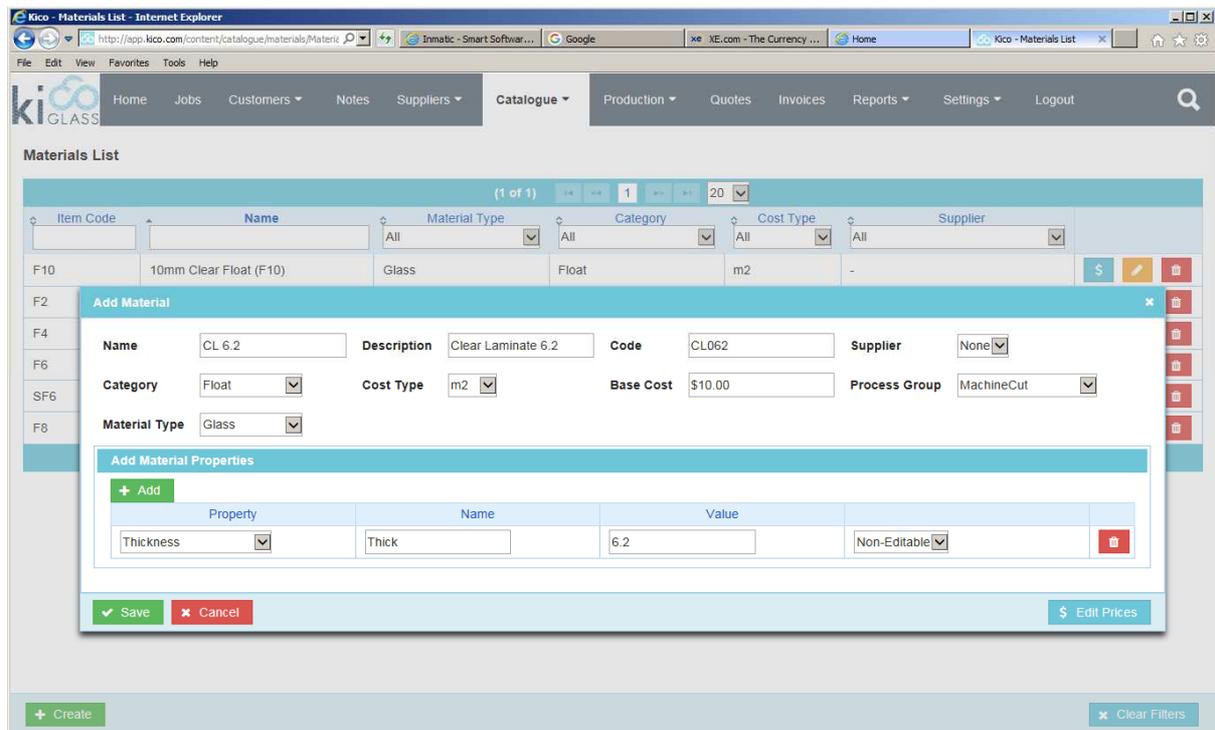
7. Setting up Catalogues

Now you understand how to enter customers and create and process jobs, it is time to set up the catalogues for your products and the pricing of them.

These structures can become pretty complicated, as they have to reflect the complexities of your production and the costing of all the items you can produce. You might even supply products that are manufactured entirely somewhere else, in which case you will have to reflect your suppliers' price structures in your system.

Essentially there are three types of costing, one goes per linear meter (for example edging or water jet cutting) one per square meter (e.g. for glass or painting) and one per piece (hardware, standard cut outs). Quite often you have these price types depending on thicknesses as well, so for example you would have a price for polishing for up to 4mm, another for 5-8mm and so forth. Furthermore you could have different price groups, we have only set up wholesale and retail for you, but there might be many more. So in the end you have to set up prices for all materials and processes, and for all thickness ranges.

7.1 Materials and Processing

So first you best set up your customer price groups, which you can do in the customers menu. Next you set up all your materials, that is all the glass you sell and all the hardware. Go to Catalogue/Materials to see the few we have added already. Modify what you have to, or delete what you don't need, and then create all the additional materials you need by clicking on Create.

In order to price these items you don't need to have them on stock, but they have to be set up as a material.

Please enter all the values you need. Base cost is the price you pay for that material. It helps us to calculate a profit for you when you are quoting. Please make sure you enter the relevant properties of that material as well, as we might need that for later processing.
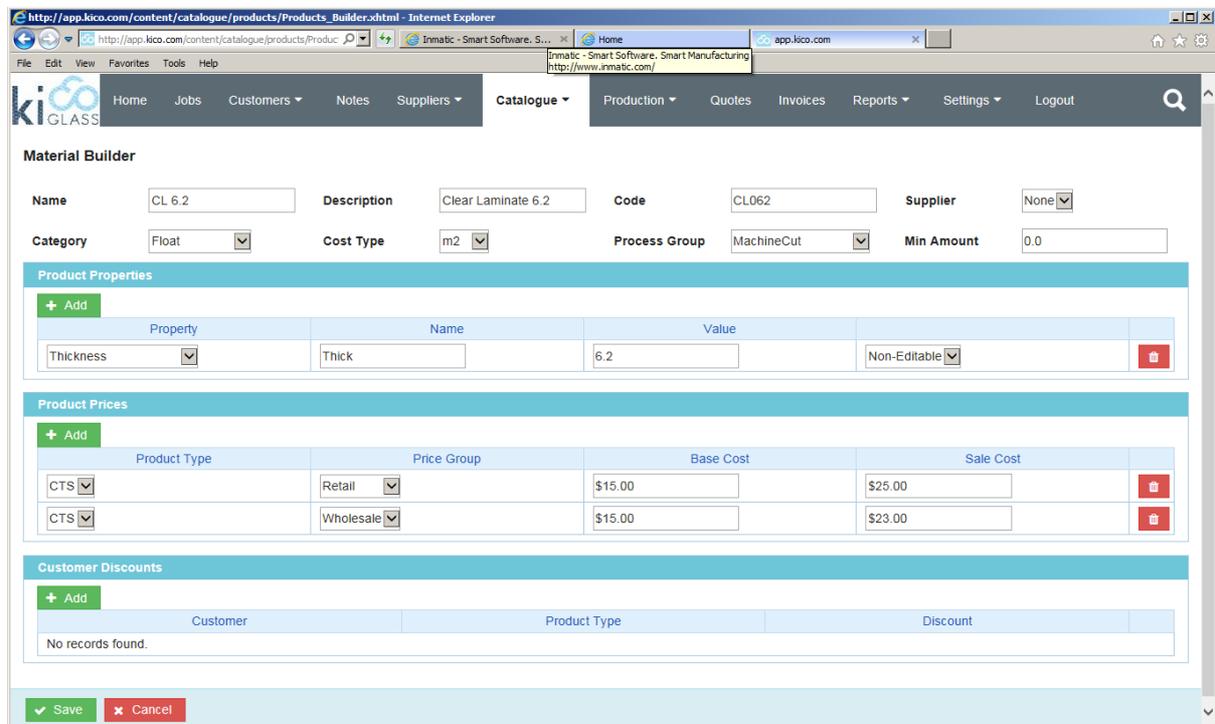
Please be aware that you can set up more materials categories as well, and you can set up more products as well by going to Catalogue/Categories. It is worth doing this now as it will help you updating prices per category, so you don't have through the whole system to do all the price changes.

You can define and then add more properties for your materials as well, by going to Catalogue/ Properties. We have set up quite a few for the management of glass, parameters that might be needed if you plan to later create and optimise layouts of pieces on stock sheets. However, if you don't plan to do that for the time being, you don't need to define all that. In the Catalogue/Processing list you can set up all your processing types as well.

7.2 Pricing

It is a good idea to set up all the important suppliers of external products (in the Suppliers menu) before you start entering prices. This will allow you to pick the supplier on the same entry form where you enter the prices.

If you select the materials from the catalogue, you will see a list of all the materials entered. If you click on the $ button of one of those entries you will come to the price entry form:
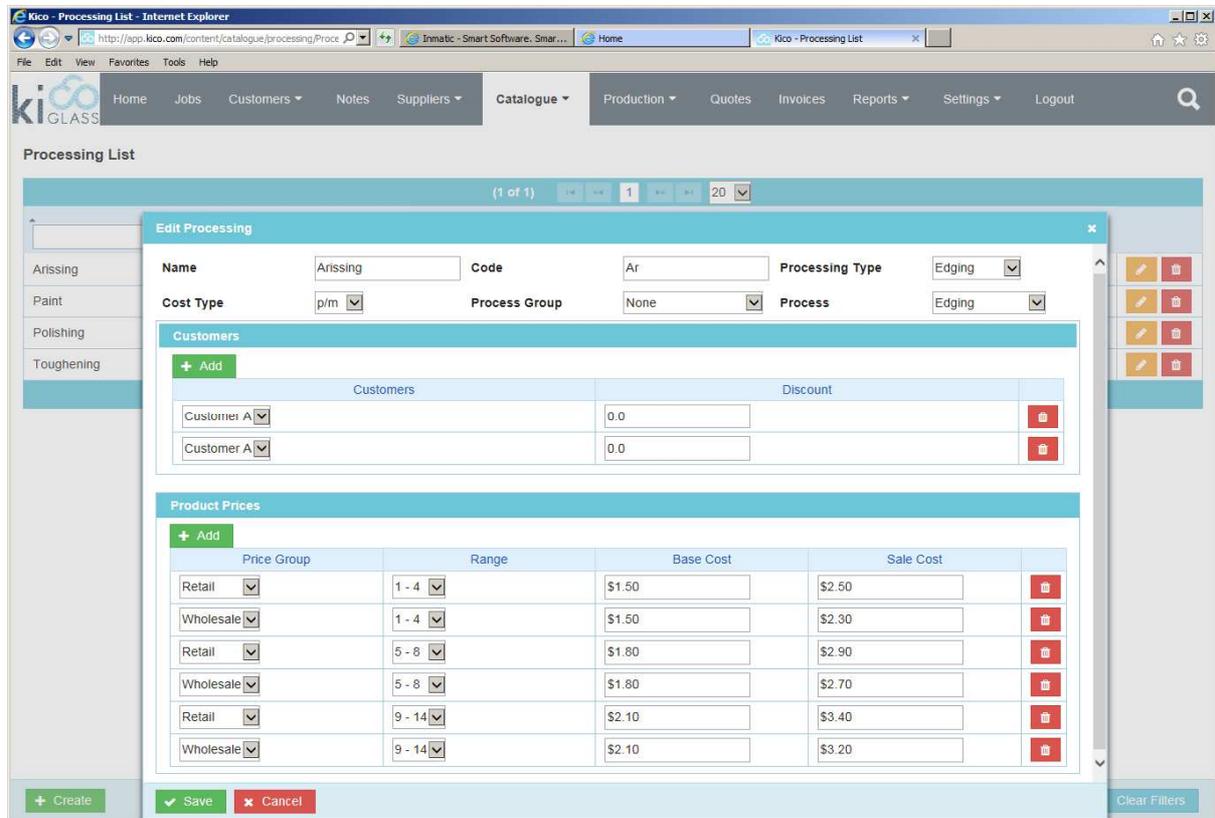

Please be aware that you have to set up prices for all price groups. If you have negotiated special terms for a particular customer and a particular product, you can enter that as well, by adding those terms in the customer discounts list.

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All other pricing follows the same structure, meaning you can enter all the pricing for example for all edging types, customer price groups and thickness ranges. For example we have added arissing to the processing list and entered its pricing:

Base Cost in here will mean your production costs. It is up to you on how you want to understand that. KicoGlass will use this value to figure out your profit on a particular job. You can enter different base costs for the different price groups, as sometimes different customer types will actually mean different base costs for you, but in most cases base cost will be the same for all price groups.
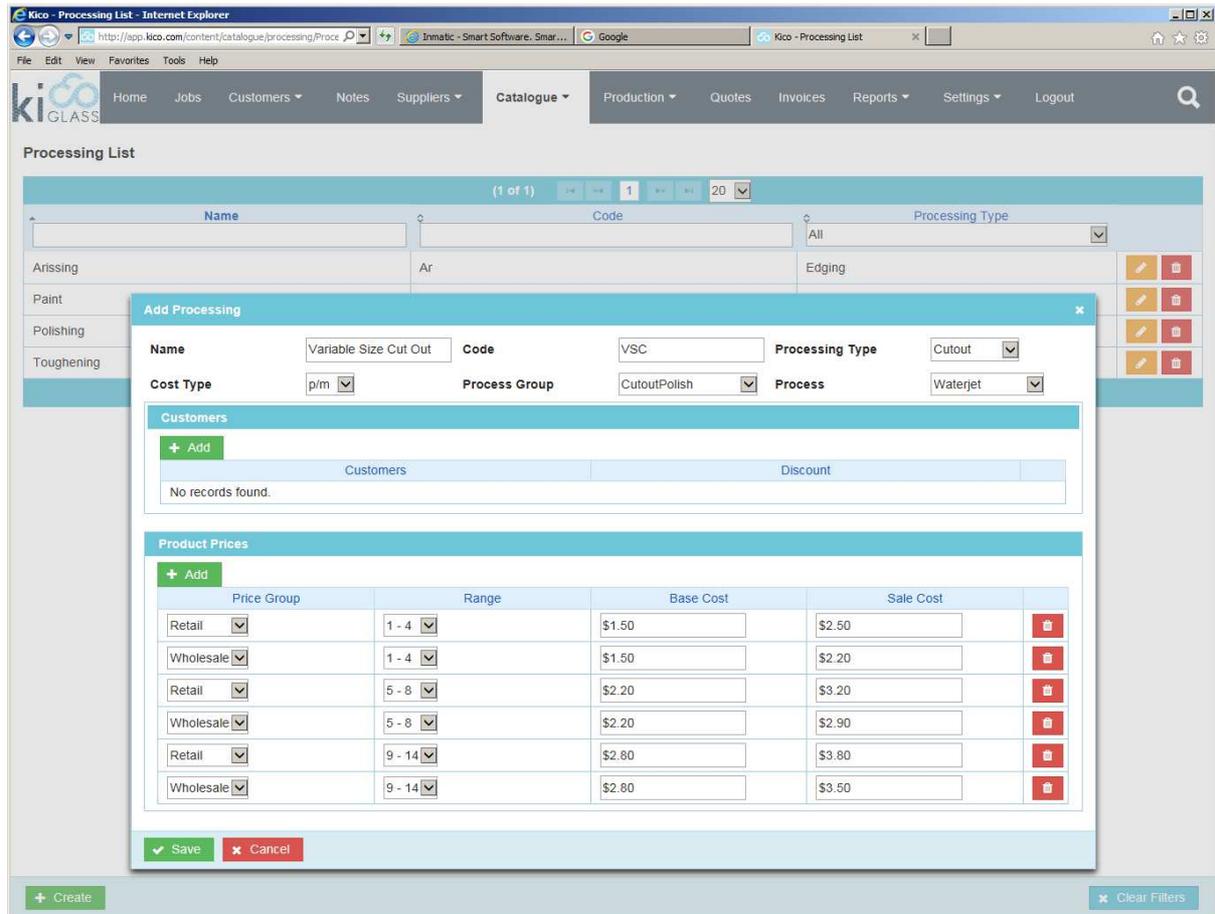
7.2 Cut Outs

There is a catalogue of cut outs and for all the cut outs you will need from there, you will have to set up the pricing as well. For every cut out you select, which does not have a corresponding price record and therefore can't be priced, we will give you a message in that regards during quoting.

For a start you best go through the list of cut outs and determine which ones you need to use. Many of those are associated with some type of hardware or other, so you only need to price those allocated with the hardware you use. Others are variable cut outs, for example the rectangular corner cut out typically used for kitchen splash backs for the overhead cupboards.

For fixed size cut outs you will set the price per piece and thickness range, for variable size cut outs pricing is calculated per meter cut, and per thickness range as well. You can link all variable cut outs to the same pricing records, if they are all priced the same. Even with fix priced cut outs, if you have similar cut outs with the same price, you can link them to the same price structure.

So first you go to Catalogue/Processing and set up some prices for cut outs:

You will need at least one entry here for cut outs, and if there is nothing else specified, on placing a cut out it will use that as the default price.

Once you have set up all your prices, you can then apply the pricing to the cut outs you are using. To set them up you have to be in KicoDraw. To go there, go to your jobs, select an item and click on edit at the bottom right summary items list. Now you can click the blue "Start KicoDraw" button and it will display your piece in KicoDraw.

First you best have a look into all cutouts provided to figure out which ones you need. Select the Treatment Mode tab and then click on the cutout symbol in the Catalog. Next, to edit all pricing for your cut outs at once, start the settings dialogue by clicking on the tool box top right. Go to Catalogs and select the Cutout tab and it will display all the cut outs. In there, edit all the cut outs by selecting their price type and edging type.

Please note that all the cut outs have names are sorted into categories as well. You can change names by simply write over it. You can too change categories and even create new ones. To do this, simply overwrite the category field with your new category name and click ok. Please check in the table if that was accepted. If not, open again and check if there is another entry with the same name. If so, change the name and try entering the new category again.

Once you entered a new category, you can subsequently just pick it from the drop down list. If you change all categories for a particular entry and that category is no longer used, it will disappear.

Names and categories are used to help you to easier find the cut out you need.

Please be aware, that there is a scaling type that goes with every cut out as well. Please do not change that entry for the existing cut outs. Fixed means that shape and size of that cut out are completely

fixed. Scalable means that you can change some parameter. Examples are a rectangular cut out with rounded corner. There you can change the width and height, and set one radius that will apply for all corner.
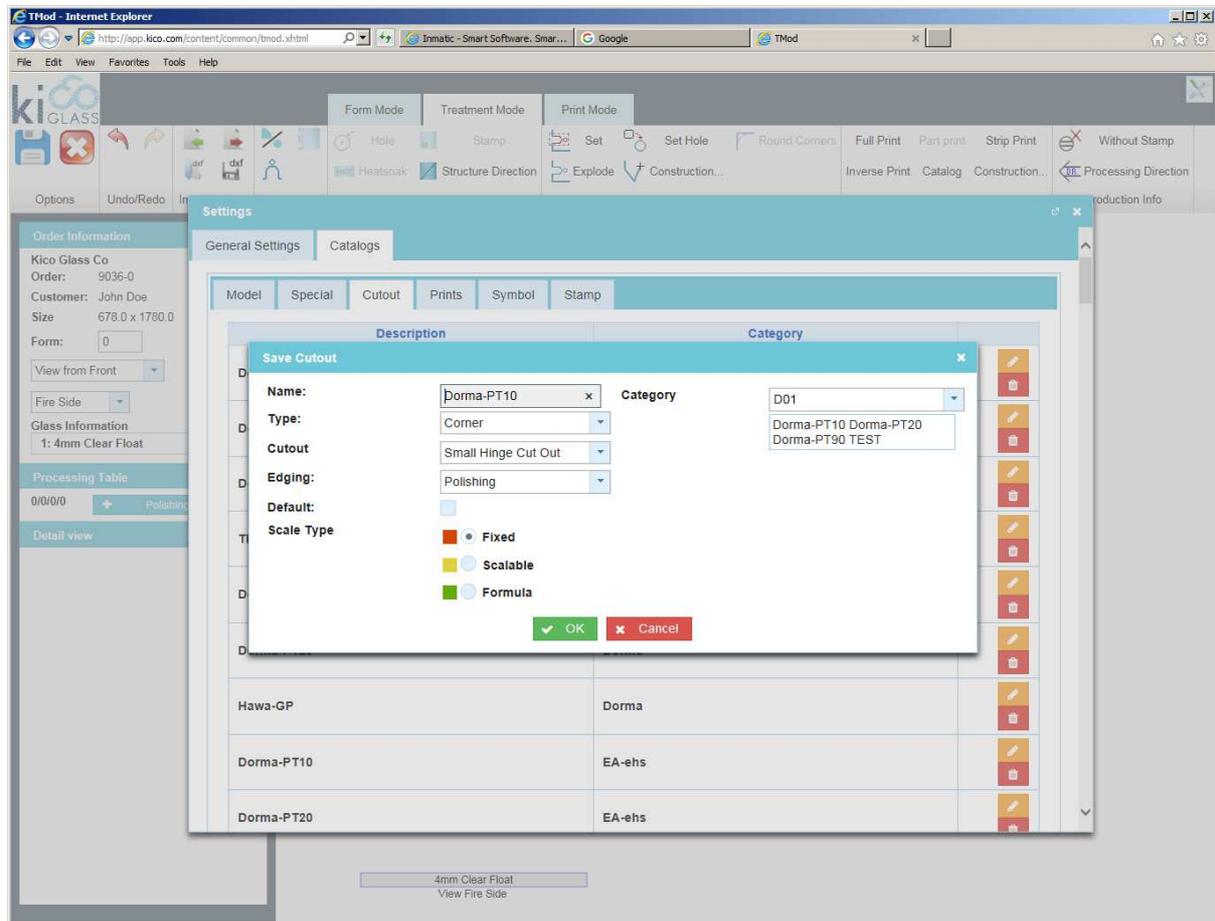
Formula means this is a complex scalable cur out, where you can enter some parameters and others will be calculated via some formula in the background.

You can hide cut outs you don't need, and for those you will of course not have to set any pricing or edging information.

On top of that you can design your own cut outs yourself as well. We will describe this in more detail in later documentation. In the meantime, if you need a cut out that's not in the catalogue, please let us know, and we will help you to get it into your catalogue.

7.2 Shapes

Currently there is not automatic calculation of a surcharge for shapes. You would have to do this manually by calculation and adding that surcharge using your own internal rules. We plan to introduce four stages of surcharge, which is then calculated and added as a percentage of the price of the item, for which you can set the percentage. Those stages would be:

- Simple: Characterised by one additional cut off the rectangle
- Regular: Other shape from catalogue without arcs
- Rounded: Shapes from catalogue with arcs
- Complex: Shapes not in catalogue

Let us know if this does not suit you and you need something different.

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8. Final Remarks

This getting started guide and all other documentation is a work in progress as is KicoGlass. If you have any questions or remarks for their improvement, please do not hesitate to contact us. Please send an email to support@kico.com. In particular, if you need or help in setting up something, please do not forget to provide a phone number and tell us when would be a good time to call us.

Furthermore, as this is all progressing fast, please check in regularly on our web site for more documentation and newer versions of all the documents.