



STEP BY STEP GUIDE: WDI ORDER PROCESS

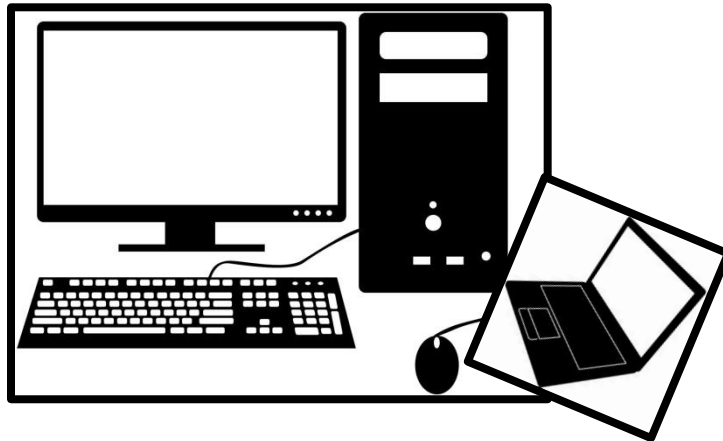
WDI Co. requires ALL customers follow a standard ordering process. Below is a step by step guide detailing requirements, steps, important notes, and policies. WDI insists all NEW customers schedule a time to meet one on one with a WDI Sales Representative when they are ready to fill out and submit their firsts order. Please contact WDI Sales Representative, Tyler, with any questions.

GUIDE SECTIONS:

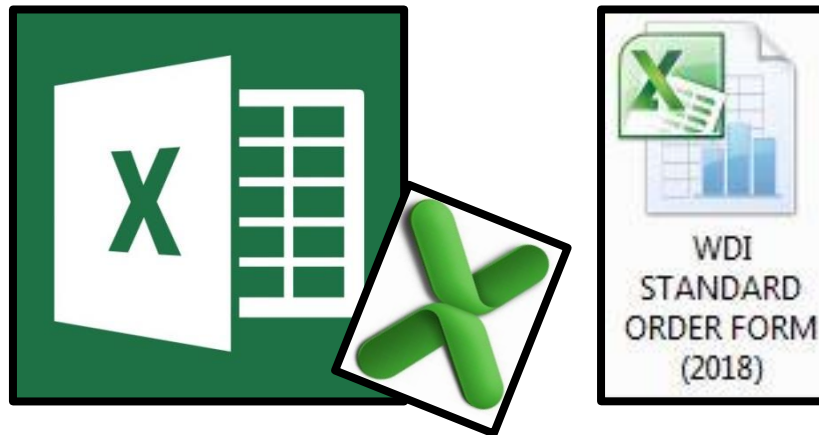
- 1. ORDER REQUIREMENTS**
- 2. PRELIMINARY STEPS**
 - a. GET A COPY OF THE WDI STANDARD ORDER FORM**
 - b. DELEGATE RESPONSIBILITY**
- 3. STEP 1: Open New Order Form & Save As**
- 4. STEP 2: Fill Out Specifications of Order & Save**
- 5. STEP 3: Email Order in Excel Format**
- 6. STEP 4: Order Pricing, Confirmation, and Billing**
- 7. STEP 5: Receiving an Order Confirmation and Expected Delivery Date**

ORDER REQUIREMENTS:

1. COMPUTER



2. MICROSOFT EXCEL & WDI STANDARD ORDER FORM



3. EMAIL SERVICE PROVIDER





PRELIMINARY STEPS:

Preliminary Step 1: Get a Copy of WDI Standard Order Form

There are two (2) ways to obtain a WDI Standard Order Form:

1. Upon initial visit from WDI Co. Sales Representative, Tyler, you may have him download a copy onto your desktop or laptop computer at that time.
2. Thereafter, you may request a copy via email to your sales representative. You will be notified and emailed a new order form without request shall WDI make any updates or changes to our order form.

Note: Clicking "Save" after filling out a new order will overwrite your blank copy. So, remember to always "Save As" after filling out a new order. This will ensure you have a blank copy to go back to when filling out orders in the future. If you do happen to overwrite your blank order form, simply request another via email or find the original email with the attached order form and re-download.

Preliminary Step 2: Delegate Responsibility

WDI requires ALL customers learn and follow the WDI ordering process. We find customers who assign one (1) employee the responsibility of learning our order process and submitting WDI Trim Kit orders are much more likely to eliminate potential ordering errors and are cleared to be set up with credit terms much sooner than new customers who do not.

Note: New customers will remain on pre-pay terms (orders to be paid for in full prior to being put into production) until they are cleared by their sales representative. For a customer to be cleared for credit terms, they must allot time to meet with their sales representative and go over the WDI order process. Thereafter, they must prove to their sales representative that they are able to fill out an order form correctly and follow the rest of the WDI order process.



OFFICE: (651) 464-6190

TOLL FREE: (800) 899-4265

FAX: (651) 464-619

EMAIL: CustomerService@TheWoodster.com

TRIM KITS: WDI ORDER PROCESS

FILLING OUT THE WDI STANDARD ORDER FORM

STEP 1: Open New Order Form & Save As

1. Open a blank copy of the WDI Order Form
2. Fill out your job specific information first (Refer to "IMAGE 1" below)
 - a. Job Name: (Ex. "Your Customers Name 1-1")
 - b. PO #: (If Applicable)
 - c. Ordered By: (Your Initials)
 - d. Customer Name: (Company Name)

Note: Leave all other cells blank for now.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	WDI Company - Window Box Order Form							WDI (651) 464-6190			Fax: (651) 464-6191			
2		Job Name:	ANDERSEN	1-1				Order Date:						
3		PO #:	1234					WDI Ship Date:						
4		Ordered By:	TI					Customer Name:	THE GREAT WINDOW CO. OF AMERICA					
5		WDI Job #						# Window Line Items:		# Parts Line Items:		Total Items:		

(IMAGE 1)

3. After filling out job specific information,
 - a. Click "File" > "Save As" >
 - b. Select save location (Ex. "Desktop") >
 - c. Enter your job name under "File Name" >
 - d. Click "Save"

STEP 2: Fill Out Specifications of Order & Save

4. Follow the images below (Cells marked with an "x" represent the information being described in the pop up box of the respective IMAGE #).

6	#	Box Size (O.D.)		O P e n i n g T y p e	Stools		Species (Oak, Maple, Poplar)	Jamb Depth From inside of Window	Casing Profile # (WDI #113, #115, #118)	Casing Width (2.25", 2.5", 3.25")	Stop/Mul 1 (WDST-numbers) Stock Profiles #006, 007, 009, 011	Stop/Mull Width (Standard = 1.25")	Window Color # (from color chips dated 2017)	Notes
		Width	Height		D i m A	D i m B								Descriptions
7														
9	1	x		W										
10	2	JAMB BOX WIDTH Using outside dimensions, enter jamb box width here												
11	3													
12	4													

(IMAGE 2): Using outside dimensions, enter jamb box WIDTH here.



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		Width	Height		D i m	D i m								
7					A	B								
9	1		x	W										
10	2													
11	3													
12	4													

JAMB BOX HEIGHT
Using outside dimensions, enter jamb box height here

(IMAGE 3): Using outside dimensions, enter jamb box HEIGHT here.

6	#	Box Size (O.D.)		Opening Type	Stools		Species (Oak, Maple, Poplar)	Jamb Depth From inside of Window	Casing Profile # (WDI #113, #115, #118)	Casing Width (2.25", 2.5", 3.25")	Stop/Mull 1 (WDST-numbers) Stock Profiles #006, 007, 009, 011	Stop/Mull Width (Standard = 1.25")	Window Color # (from color chips dated 2017)	Notes Descriptions
		Width	Height		D i m	D i m								
7					A	B								
9	1			x										
10	2			W										
11	3			D										
12	4			S										
13	5			H										

OPENING TYPE
(W)indow Trim Kit (Default)
(D)oor Trim Kit
(S)tool & Apron Window Trim Kit
(H)eader Window Trim Kit
(C)ustom/Round Top Window Trim Kit
(O)ctagon Window Trim Kit

(IMAGE 4): Enter OPENING TYPE here.

6	#	Box Size (O.D.)		Opening Type	Stools		Species (Oak, Maple, Poplar)	Jamb Depth From inside of Window	Casing Profile # (WDI #113, #115, #118)	Casing Width (2.25", 2.5", 3.25")	Stop/Mull 1 (WDST-numbers) Stock Profiles #006, 007, 009, 011	Stop/Mull Width (Standard = 1.25")	Window Color # (from color chips dated 2017)	Notes Descriptions
		Width	Height		D i m	D i m								
7					A	B								
9	1			W			x							
10	2			W										
11	3			W										

WOOD SPECIES
Enter wood species here

(IMAGE 5): Enter WOOD SPECIES here.



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	#	Width		Height	D i m								
7				A	B								
9	1			W			x						
10	2			W			JAMB DEPTH Enter jamb depth here. Recommendation: Leave jamb depth measurement 1/8" - 1/4" shy from butting up to the frame of your window.						
11	3			W									
12	4			W									
13	5			W									

(IMAGE 6): Enter JAMB DEPTH here.

6	Box Size (O.D.)		O P e n i n g T y p e	Stools		Species (Oak, Maple, Poplar)	Jamb Depth From inside of Window	Casing Profile # (WDI #113, #115, #118)	Casing Width (2.25", 2.5", 3.25")	Stop/Mul 1 (WDST- numbers) Stock Profiles #006, 007, 009, 011	Stop/Mull Width (Standard = 1.25")	Window Color # (from color chips dated 2017)	Notes Descriptions
	#	Width		Height	D i m								
7				A	B								
9	1			W				x					
10	2			W			CASING PROFILE # Enter # reference to casing profile here. Stock Casing Profile #'s: 113 (Ranch) 115 (Colonial) 118 (Princeton) Custom/Non-Stock Profile #'s: Refer to WDI Molding Catalog						
11	3			W									
12	4			W									
13	5			W									
14	6			W									

(IMAGE 7): Enter CASING PROFILE # here.

6	Box Size (O.D.)		O P e n i n g T y p e	Stools		Species (Oak, Maple, Poplar)	Jamb Depth From inside of Window	Casing Profile # (WDI #113, #115, #118)	Casing Width (2.25", 2.5", 3.25")	Stop/Mul 1 (WDST- numbers) Stock Profiles #006, 007, 009, 011	Stop/Mull Width (Standard = 1.25")	Window Color # (from color chips dated 2017)	Notes Descriptions
	#	Width		Height	D i m								
7				A	B								
9	1			W				x					
10	2			W			Enter casing width here. Stock Casing Widths 2.25" 2.5" 3.25" Custom/Non-Stock Widths Refer to WDI Molding Catalog						
11	3			W									
12	4			W									
13	5			W									

(IMAGE 8): Enter CASING WIDTH here.



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6	Box Size (O.D.)	Opening Type	Stools	Species	Jamb Depth	Casing Profile #	Casing	Stop/Mull 1 (WDST-numbers)	Stop/Mull	Window	Notes	
												#
7	Width	Height	D i m	D i m	Species (Oak, Maple, Poplar)	From inside of Window	(WDI #113, #115, #118)	Width (2.25", 2.5", 3.25")	Stock Profiles #006, #007, #009, #011	Width (Standard = 1.25")	Color # (from color chips dated 2017)	Descriptions
9	1		W						x			
10	2		W						STOP/MULL PROFILE # Enter "006" for stock stop			

(IMAGE 9): Enter STOP/MULL # here.

6	Box Size (O.D.)	Opening Type	Stools	Species	Jamb Depth	Casing Profile #	Casing	Stop/Mull 1 (WDST-numbers)	Stop/Mull	Window	Notes	
												#
7	Width	Height	D i m	D i m	Species (Oak, Maple, Poplar)	From inside of Window	(WDI #113, #115, #118)	Width (2.25", 2.5", 3.25")	Stock Profiles #006, #007, #009, #011	Width (Standard = 1.25")	Color # (from color chips dated 2017)	Descriptions
9	1		W						x			
10	2		W									
11	3		W									
12	4		W									
13	5		W									
14	6		W									

(IMAGE 10): Enter STOP MULL WIDTH here. This section will auto-populate with standard width.

6	Box Size (O.D.)	Opening Type	Stools	Species	Jamb Depth	Casing Profile #	Casing	Stop/Mull 1 (WDST-numbers)	Stop/Mull	Window	Notes	
												#
7	Width	Height	D i m	D i m	Species (Oak, Maple, Poplar)	From inside of Window	(WDI #113, #115, #118)	Width (2.25", 2.5", 3.25")	Stock Profiles #006, #007, #009, #011	Width (Standard = 1.25")	Color # (from color chips dated 2017)	Descriptions
9	1		W							x		
10	2		W									
11	3		W									
12	4		W									
13	5		W									
14	6		W									

(IMAGE 11): Enter stock COLOR # here.



6	Box Size (O.D.)		O p e n i n g T i p e	Stools		Species (Oak, Maple, Poplar)	Jamb Depth From inside of Window	Casing Profile # (WDI #113, #115, #118)	Casing Width (2.25", 2.5", 3.25")	Stop/Mul l (WDST- numbers) Stock Profiles #006, 007, 009, 011	Stop/Mull Width (Standard = 1.25")	Window Color # (from color chips dated 2017)	Notes
	#	Width		Height	D i m								D i m
7				A	B								
9	1			W									x
10	2			W									NOTES/DESCRIPTION List Important Notes here. Examples: "Loose & Unassembled" = kit unassembled & casing left long for mitering "Knock-Down" = Kit unassembled & lengths cut to spec./casing pre-mitered (Room Location, etc.)
11	3			W									
12	4			W									
13	5			W									
14	6			W									

(IMAGE 12): Enter important NOTES here.

5. After filling out order specifications,
 - a. Click "Save" >
 - b. Close out of Excel

Note: Orders that exceed 11 individual trim kits require an additional order form. You will save orders as "Job Name 1-2" & "Job Name 2-2". (Ex. Ordering between 12-22 individual trim kits requires 2 separate order forms, Ordering 23-33 individual trim kits requires 3 separate order forms, and so on...)

STEP 3: Email Order in Excel Format

6. In a New Email, click "Attach File" >
7. Located where you saved your new order > Click on the order form icon > Click "Insert"
8. In the email's "To..." line, enter tyleri@thewoodster.com >
9. In the emails "Subject:" line, enter the "job name" >
10. Click "Send"

Note: WDI requires ALL orders be filled out by the customer (you) in our Excel order form and sent to us via email in Excel format (.xlsx). New customers must prove they are capable of following the WDI Order Process before they are transferred to WDI Internal Orders. New customers will remain on pre-pay terms until their sales representative confirms they are able to fill out orders correctly. We encourage new customers assign a company employee the responsibility of learning the WDI order process and ordering WDI Trim Kits.

STEP 4: Order Pricing, Confirmation, and Billing

You will receive a response to your email with your order attached. Your order will have been given pricing per individual trim kit, and total order cost (cost of material) will be provided at the bottom of your order form.

11. Open the attached file and double check specifications and pricing
12. After reviewing your order, respond to this email with "Good to go."
13. WDI will receive your "Good to go", and your order will be placed into production

Note: It is WDI policy that ALL initial orders from new customers are pre-paid for in full prior to their order being placed into production. Thereafter, customers may choose to get set up on credit terms with WDI. Remember, no customer will be cleared to be set up on credit terms until they have proven to their sales representative that they are able to fill out order forms correctly and follow the rest of the WDI order process. For this reason, it is imperative that new customers provide time for their sales representative and chosen employee to go over WDI's order process.



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STEP 5: Receiving an Order Confirmation and Expected Delivery Date

14. Once WDI has placed your order into production, you will be emailed an order confirmation notice.

Within your order confirmation you will find expected delivery date.

Note: Customers on pre-pay terms will be sent an order confirmation after billing has been cleared with WDI's Accounting Department (At this time, their order will be placed into production). Customers on credit terms will be sent order confirmations upon giving their "Good to go" (At this time, their order will be placed into production). It's important to note, turnaround times and expected delivery dates can be heavily affected or delayed if customers remain on pre-pay terms and are untimely on prepayments.