Windows Express

An in-depth guide to online quoting

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What is Windows Express

Are you ready to transform the way you quote, sell, and manage window and door projects?

Windows Express is the breakthrough solution developed by **Gentek** and powered by **Paradigm**, designed to simplify and accelerate your business from quote to close, all from the convenience of your web browser.

🌐 100% Online, Work from Anywhere

Whether you're in the office, at home, or on the job site, **Windows Express is entirely cloud-based**, meaning **you're never tied to a specific device or location**. No downloads, no complicated setup, just log in and get to work.

- **Access anytime, anywhere**
- **Automatic updates and backups**, no IT headaches
- **Secure cloud infrastructure**, your data is safe and always available

🛠 No Special Hardware Needed, Just Click and Go

Forget expensive workstations or high, end software installations. With Windows Express:

- All you need is a **device with a browser and internet connection**
- Compatible across **PCs, Macs, tablets**, and more
- **No additional hardware or software requirements** – everything runs seamlessly in the cloud

This is a **plug-and-play solution** that gets you quoting and selling faster than ever before.

⚡ User-Friendly by Design, Fast. Intuitive. Hassle-Free.

Built with users in mind, **Windows Express requires no technical background or advanced training.**

- Simple, modern interface
- Guided quoting tools that eliminate guesswork
- Real-time product visualization powered by Paradigm
- Quick onboarding with minimal ramp-up time

Whether you're a seasoned pro or new to selling windows and doors, **you'll feel confident using Windows Express from day one**.

🔄 **Why Upgrade or Make the Switch?**

- Streamline your **sales and quoting process**
- Eliminate **manual errors** and paperwork delays
- **Save time**, boost accuracy, and increase customer satisfaction
- Backed by **Gentek's trusted product catalog** and **Paradigm's powerful engine**

What to do once I receive my activation code

🚀 Step-by-Step Activation

1️⃣ Go to the Link Provided

Click on the link we sent you (or copy it into your browser). This will take you to the Windows Express registration portal.

💡 Pro tip: Use the latest version of Chrome, Edge, or Firefox for best performance.

2️⃣ Click "Register"

On the portal page, select the **"Register"** button to start your account setup.

3️⃣ Fill Out the Required Fields

You'll be asked for basic info to verify your access.
⚠️ **Important:** Use the **exact same email address** that was originally provided this is how we match your activation code to your account.

4️⃣ Check Your Email for a Verification Link

Once you submit the form, check your inbox for a verification email.
Click the link inside to confirm your account.
⏱️ Didn't get it? Check your spam folder or wait a few minutes

5️⃣ First Sign-On & Enter Activation Code

After verifying your email, return to the portal and log in using your newly created credentials.
You'll be prompted to enter your **activation code**, the one you received earlier.

Once entered, you're officially activated!

✅ That's It — You're In.

Adding a client

🧾 Adding & Configuring a New Client in Windows Express

Getting your customers set up correctly from the start makes everything smoother from pricing and billing to deployment and support. Here's how to add and configure a new client in **Windows Express** step by step.

👤 Step-by-Step: Add a New Customer

1️⃣ Click "My Customers"

From your main dashboard, go to the **"My Customers"** section. This is where you'll manage all your clients.

2️⃣ Click "New Customer"

Select the **"New Customer"** button to create a new client profile.

3️⃣ Fill Out the Requested Fields

Enter your customer's basic information, business name, contact info, and email.

🎯 Be sure the email is accurate, it's essential for account communication

4️⃣ Click "Save"

Once you've entered all the details, hit **"Save"** to lock in the client's profile.

5️⃣ Click "Addresses"

Next, go to the **"Addresses"** tab within the customer profile.

6️⃣ Add Billing & Shipping Addresses

Click **"Add New"** to enter billing and shipping addresses for the client.
You can enter multiple addresses, and these can always be updated later if anything changes.

💲 Now, Let's Set Up Pricing

7️⃣ Click "Pricing"

Inside the customer profile, go to the **"Pricing"** tab to configure how this client will be billed.

8️⃣ Choose Your Pricing Model

Decide how you want to price for this client:

- **Markup**: Apply a percentage increase based on your cost
- **Discount**: Offer a percentage off the standard list price

Pick the model that best aligns with your sales strategy or agreement with the customer.

9️⃣ Fill Out Required Fields

Add the necessary pricing details:

- Your selected markup or discount rate
- Local **taxes**
- Any **freight** or **labor charges** specific to this client

⚙️ You can customize this per client to ensure transparency and accuracy in every quote or invoice.

🔟 Don't Forget to Click "Save"

Once everything's set, click **"Save"** to apply the pricing structure to the client's profile.

✅ That's It – Your Client Is Fully Set Up

Creating your first quote

📄 Creating Your First Quote in Windows Express

Once your client is set up, the next step is creating your first quote. This is where you'll define the scope of the project, set expectations, and get one step closer to closing the deal.

Here's how to build a quote from the ground up:

🛠 Step-by-Step: Create a New Quote

1️⃣ Click "New Quote"

From the Quotes section, select **"New Quote"** to begin building your quote.

2️⃣ Enter a Quote Name

Give your quote a clear, descriptive name, something your team and the client can both recognize easily.

3️⃣ Assign a Project Name (Optional but Recommended)

If this quote is part of a larger or **ongoing project with multiple phases**, assign it a **Project Name**.

📁 This makes it easier to track and reference later, especially when you're juggling multiple quotes or phases for the same client.

4️⃣ Click "Save"

Once you've entered the basic info, click **"Save"** to generate your new quote record.

🧾 Additional Quote Details

5️⃣ Customer PO

Enter the **Customer PO** number, this is your internal purchase order **to Gentek** for the job.

6️⃣ Assign a Salesperson

Optionally, you can assign this quote to someone on your **internal sales team** for tracking, collaboration, or commission purposes.

7️⃣ Set Weeks to Defer Delivery

If you want to delay delivery (e.g., due to scheduling or client request), set the number of **weeks to defer**.

⏳ This gives you control over timing and helps align production with your client's timeline.

8️⃣ Click "Save" Again

Save your updates to lock in the quote details.

🧑 Assigning the Customer

9️⃣ Click "Customer"

Now it's time to connect the quote to the client it's for.

- If the client has already been created, click **"Change Customer"** and select them from your list.
- If this is a **new customer**, click **"New Customer"** to add them on the spot.

⚠️ **Note:** If you create a new customer from this screen, be sure to **go back to "My Customers"** afterward to complete their **address and pricing setup**. Quotes are best built when all customer data is complete.

✅ Quote Created – What's Next?

With your client assigned and details in place, you're ready to start adding products, reviewing totals, and sending the quote out for approval.

This is where sales move forward, fast and accurately

Understanding the catalogue

🧱 Building Your First Item in a Quote

With your quote created, it's time to dive into the **line items**, this is where the real configuration begins. Whether it's a single window or a full project build-out, Windows Express gives you access to the complete **Gentek catalogue** with guided, step-by-step product configuration.

Let's walk through adding your first item.

🪜 Step-by-Step: Add a Line Item to Your Quote

1️⃣ Click "Line Items"

Inside your open quote, click the **"Line Items"** tab to begin adding products.

2️⃣ Click "New Line Item"

Clicking **"New Line Item"** opens the full **Gentek catalogue**, giving you access to every available product and configuration.

3️⃣ Use Filters to Narrow Down

On the **left-hand side**, you'll see filters to help you navigate:

- **Product Type** (e.g., Windows, Doors)
- **Series** (e.g., Regency, R400 etc.)

🔍 These filters are helpful for quickly finding the exact product line you're working with.

4️⃣ Select Your Product

For this example, let's build a **Regency Window**.

- Select **Windows** as the product type
- Choose the **Regency** series
- Then, select your **Model**, in this case, we'll go with **Operating Casement**

5️⃣ Choose Configuration: Number Wide

After clicking on **Operating Casement**, you'll land on a configuration screen asking:
"Number Wide" — this refers to the number of **lites (sections)** in the window.

- For this example, select **2**
- You'll see the **top of the screen populate**, and a new button will appear at the bottom:
  "Dimensions/Unit Type" click it to continue.

6️⃣ Guided Shopping Begins

Now you're in **Guided Shopping Mode**. The system will guide you step-by-step down the page, This ensures nothing is missed.

7️⃣ Enter Your Dimensions

Let's build our window:

- Width: **60"**
- Height: **60"**

Continue down the page as it moves.

8️⃣ Set Operation/Venting

When you reach **"Operation/Venting"**, click the **"Set per Unit"** button on the right.
This allows you to assign operators to each lite individually, great for customizing venting and usability.

9️⃣ Complete All Required Fields

Continue filling out each section of the guided shopping flow. Once all required fields are completed **with no errors**, a new button will appear at the bottom:

➡️ **"Frame and Color"**, click it to move to the next stage.

Continue through the guided experience, selecting:

- **Frame type**
- **Exterior & interior color options**
- **Glass packages**
- **Hardware**
- **Wrapping options**

Make sure all sections are filled in completely. The system will only allow you to proceed when all required fields are valid.

✅ Finish & Add to Quote

Once you've completed all sections, up to and including **Hardware and Wrapping** (If there are no Grills), a final button will appear at the bottom right:

🟢 **"Add to Quote"**, click it.

Your first item is now built and added to the quote.

You're On Your Way

You've just created a fully customized window and added it to your quote including dimensions, venting, color, and hardware. From here, you can continue adding items, review pricing, and finalize your proposal.

Mulling Units

🧷 Mulling Units Together in Windows Express

Mulling allows you to **combine multiple units** into a single configuration — whether it's stacking a shape above a window, placing two side-by-side, or creating custom assemblies. It's easy, visual, and completely integrated into your quoting workflow.

Let's walk through mulling a new unit onto the **operating casement** window we just built.

🧱 Starting with Your Existing Window

1️⃣ Begin on the "Line Items" Page

From inside your quote, navigate to the **"Line Items"** tab.

2️⃣ Click "Edit" on Line Item #1

Find the window you created earlier (your Operating Casement) and click **"Edit"** to open the configuration.

3️⃣ Click "Mull" in the Bottom Left

On the bottom-left corner of the screen, you'll see an option labeled **"Mull"** go ahead and click it.

🧩 Choose How to Mull

You'll now see two options:

- **Mull New Unit**: Build a brand new window or shape to mull to your current unit.
- **Copy and Mull**: Duplicate the exact unit you just created and attach it.

For this example, select **"Mull New Unit"**.

🖼️ Mull Placement

You’ll now see a diagram of your current window with available mull points highlighted in **red**.

- For this example, click the **top** of the window to add a unit **above** your casement.
- Then click **“Next”** to proceed.

? Add a Shape to the Top

Let’s add a **triangle** shape above the casement:

4️⃣ Browse to Polygon Shapes

Scroll through the Gentek catalogue and locate the **Polygon Shapes** section.

- Select **“Triangle”** as your new unit.
- Choose **“Standard Alignment”** when prompted.

Then click **“Finish”** to start configuring the shape.

📐 Configure the New Unit

You’ll now land on the **Dimensions & Unit Type** screen for the triangle.

- Set the **Frame Height** to **50"**
  (Width will be inherited from the unit below)

Then continue through **Guided Shopping**, just like you did with the casement window answering each prompt to define:

- Glass
- Frame options
- Color
- Hardware (if applicable)

🎯 Note: The guided flow ensures compatibility and completeness, no missed steps, no errors.

🛑 Finalize the Mull

Once you've completed the triangle configuration:

5️⃣ Deselect All Units

At the bottom right, click **"Deselect All Units"** this ensures no unit is actively selected when saving.

6️⃣ Click "Save Line"

Once deselected, hit **"Save Line"** to finalize the mulling.

✅ You've Mulled Two Units Together

You now have a **casement window with a triangle shape mulled above** fully built, configured, and saved within your quote.

You can view and edit either unit individually or continue building additional line items or mulls as needed.

Special assemblies and custom patio doors

🛠️ Special Assemblies & Custom Patio Doors

While most products can be configured directly within Windows Express, some more complex setups like **special assemblies** or **custom patio doors** require a bit of manual support from the Gentek team to ensure accuracy and compliance.

Here's how to handle those cases smoothly:

🔧 When a Unit Requires Special Assembly

Some window and door combinations, especially unique mulls, oversized shapes, or architecturally complex builds need to be flagged as **special assemblies**.

? For Custom Patio Doors

Custom-sized patio doors also follow a slightly different process, since quotes must be obtained from the manufacturer before proceeding.

📩 How to Submit a Special Assembly or Custom Patio Door Request

1️⃣ Email Your Request

Send an email to your Gentek representative or branch contact with the following details:

- Your **Quote Number** (from Windows Express)
- A description of the **special assembly** or **custom patio door size**
- Any drawings or specs if available

💡 The more detail you can provide upfront, the faster we can configure it for you.

2️⃣ Gentek Will Handle the Configuration

Once your request is received:

- For **special assemblies**, we'll add the unit directly to your quote and configure it based on your specifications.

- For **custom patio doors**, we'll first **request a quote from the manufacturer**. Once approved, we'll add the configured item to your quote.

🧾 Review & Proceed

Once the special item is added to your quote, you'll be able to:

- See it listed as a **line item**
- Review dimensions, pricing, and specifications
- Proceed as normal with approvals or edits

Rush Requests

⚡ Rush Requests in Windows Express

Need a product faster than the standard lead time? **Rush requests** are available for certain products but require coordination with the manufacturer to confirm feasibility and timelines.

Just like with special assemblies and custom patio doors, the Gentek team will work with you to make sure it's both **possible** and **financially viable** before proceeding.

🔄 How Rush Requests Work

1️⃣ Contact Gentek

If you'd like to request a rush on any item in your quote, send an email to your Gentek representative or local branch.

Make sure to include:

- Your **Quote Number**
- The **specific item(s)** you'd like rushed
- Any **timing requirements** or project deadlines

2️⃣ We'll Inquire with the Manufacturer

Gentek will reach out to the manufacturer to determine:

- If a rush is possible for the requested item(s)
- The **estimated lead time**
- Any associated rush charges or limitations

🕒 Our goal is to ensure you can meet your deadlines **without compromising profitability**.

💵 Cost of Rush Requests

If you choose to proceed with the rush:

- A **$25 charge per lite** will be applied, plus any applicable fee stated by the manufacturer
- The rush item will be added to your quote with the appropriate notes and costs

✅ Approval Before Proceeding

Nothing is added to your quote until **you approve** the rush lead time and charges. This gives you full control over both **timeline** and **budget**.

Understanding my Paperwork

📝 Finalizing Your Quote & Understanding Paperwork in Windows Express

Once you've built your quote, configured your products, and handled any special items or rush requests, it's time to **finalize the quote and review your paperwork.**

This step is critical, it ensures you fully understand **your costs**, **client pricing**, and the documents you'll be sharing or keeping for internal use.

🧾 Final Step: Accessing Paperwork

1️⃣ Click "Actions" at the Top Right of Your Screen

In the top right corner of your quote screen, you'll see a button labeled **"Actions."**

Click it, and then select **"Paperwork"** from the dropdown menu.

🗂️ Understanding the Paperwork Options

You'll now see a list of downloadable documents, each labeled for clarity. Here's how to interpret them:

🟩 Anything Labeled "Customer"

These documents are formatted for your **resale to your client**.
They'll include:

- Your selling price
- Item descriptions
- Quote breakdowns for client review

🧾 Use this when presenting or sending the quote to your customer.

🟦 Anything Labeled "Dealer"

These documents are **for your internal use** as a dealer.

They'll show:

- Your **costs**
- Any **applicable discounts**
- Optional charges (freight, labor, rush fees, etc.)

💰 To Review Your Cost Details

To view your **complete cost breakdown**, including discounts:

- Open or download the document labeled **"Dealer - Pricing Detail"**

This is your go-to sheet for confirming profitability and ensuring pricing aligns with your expectations.

🔍 Double-check this before submitting the order to avoid any surprises.

⚠️ ⚠️ ⚠️ Do not use the built-in e-mail as messages go through the AMI/Gentek server, and you won't have a record of sending them. ⚠️ ⚠️ ⚠️

✅ You're Ready to Go

At this stage, your quote is:

- Fully built
- All line items configured
- Special requests handled (if any)
- Pricing reviewed
- Paperwork generated

You're now ready to **send the quote to your client** or **submit it for order processing.**

Placing my order

🏁 Placing Your Order in Windows Express

Once your quote is finalized, your paperwork is in order, and you're confident in your selections, the last step is to **submit your order for production**.

📫 How to Place Your Order

To move forward:

1️⃣ Contact Gentek

Send an email or call your **Gentek representative or local branch**.

Be sure to include your:

- **Quote Number**
- A simple request to **place the order into production**

⚠️ Important: Final Review & Commitment

By requesting your quote be placed into production, you are confirming the following:

"I have reviewed this order and certify that it is correct. I understand that this order is non-cancellable, non-returnable, and non-refundable."

Please double-check:

- **Product configurations**
- **Dimensions**
- **Color and hardware selections**
- **Pricing**

Once submitted, the order **cannot be changed**, so it's critical that everything is accurate.

✅ You're Done!

After your request is received, Gentek will:

- Move your quote into production
- Begin manufacturing based on your specifications

🧭 Need Support?

Still have questions before submitting? Your **local branch or sales representative** can walk you through a final review to ensure everything is correct before placing the order.