

# MIE QuoteIt Quick Start

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Welcome to MIE QuoteIt. This quick start guide will take you step by step in creating a new quote using the sample data provided. Once you have familiarized yourself with doing a simple quote you can begin creating your own quotes to send to your customers. This guide is based on using the sample data provided during the installation. You will be able to create data specific to your companies needs.

## SETTING UP YOUR 30 DAY TRIAL

The first screen you will see when you start QuoteIt for the first time will ask you for an unlock code. Call 714 786-6230, Dial 2 to receive your unlock code.

## LOGON




The sample data provided during login will require you to type the letter **M** in the password field which will give you access to the application.

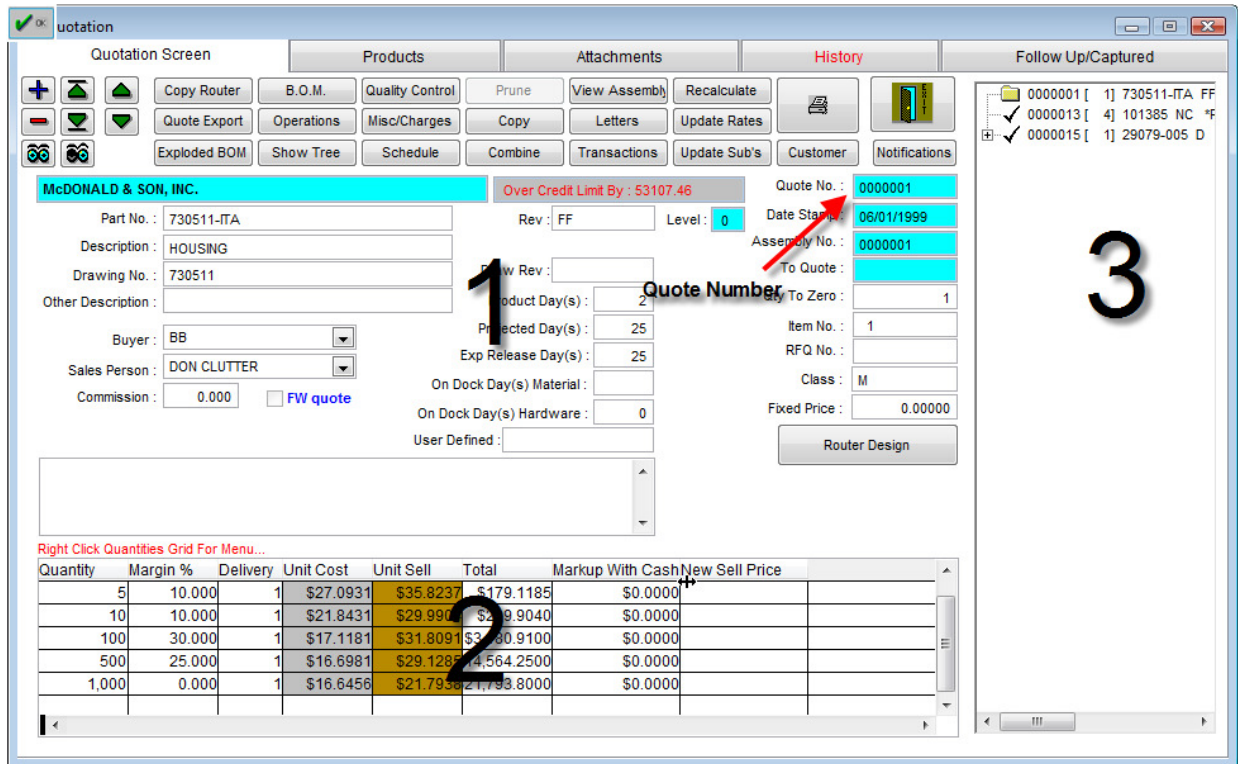
## CREATING YOUR FIRST QUOTE

There are two parts to creating quotes which one is the detailed quote that is internal where you enter your labor, material, hardware and outside services costs. This quote is used internally to calculate the cost and price that you will charge your customer. The second is the quote letter which is where a formal proposal is created to send to your customer. The quote letter is created by using prices of the detailed quote.

Under the maintenance pull down menu is a list of all areas in the quoting system that can be modified with your specific customers, vendors, operations and bill of material items. The sample quote shown below will use the default data that comes with the system. When you are ready to move forward you can create data to match your own company.

## QUOTE SCREEN

Near the top left corner of the screen is a drop down menu. Go to the File drop down menu and select Quoting. The screen is broken up into 3 sections where 1 is the part information, 2 the quantities, costs and prices and 3 is the assembly tree outline. Initially the screen will show a quote on the screen with a part number, prices, etc. You can move to other quotes by using the  buttons or   search buttons.



McDONALD & SON, INC. Over Credit Limit By : 53107.46

Quote No. : 0000001  
Date Stamp : 06/01/1999  
Assembly No. : 0000001  
Item No. : 1  
Class : M  
Fixed Price : 0.00000



Part No. : 730511-ITA Rev : FF Level : 0  
Description : HOUSING  
Drawing No. : 730511  
Other Description :  
Buyer : BB  
Sales Person : DON CLUTTER  
Commission : 0.000  FW quote

Product Day(s) : 2  
Projected Day(s) : 25  
Exp Release Day(s) : 25  
On Dock Day(s) Material :  
On Dock Day(s) Hardware : 0  
User Defined :

Quantity Margin % Delivery Unit Cost Unit Sell Total Markup With Cash New Sell Price

Quantity	Margin %	Delivery	Unit Cost	Unit Sell	Total	Markup With Cash	New Sell Price
5	10.000	1	\$27.0931	\$35.8237	\$179.1185	\$0.0000	
10	10.000	1	\$21.8431	\$29.9900	\$299.9040	\$0.0000	
100	30.000	1	\$17.1181	\$31.8091	\$3180.9100	\$0.0000	
500	25.000	1	\$16.6981	\$29.1285	\$14564.2500	\$0.0000	
1,000	0.000	1	\$16.6456	\$21.7958	\$21798.8000	\$0.0000	

### STARTING A NEW DETAIL QUOTE

To start a new quote hit the  button. After clicking the  button you will be presented with a screen to select the customer this quote is for. Select DAWES AND CRANE, INC. and hit enter or click on the ok button.

Display Active Customers Only

To search for a company, click on customer column and type a company name.

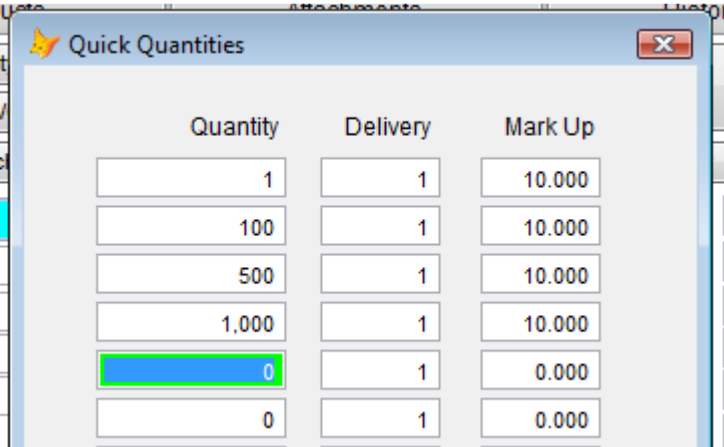
ID	Customer	State	Contact	Phone Nu
000006	DAWES AND CRANE, INC.		JOE DAWES	(714) 723
000007	EMPIRE TOOL COMPANY	MN	STEVE SCHILLEMANN	(612) 874
000010	FOLEY ENGINEERING		JIM WEAVER	(414) 239
000011	GLOBE EQUIPMENT		BILL ROSHELL	(419) 655
000008	INDIANHEAD ENTERPRISES		CRAIG McCOMB	(215) 439
000002	MIDWEST MANUFACTURING		JOHN CLARK	(715) 476

### ENTER BASIC PART INFORMATION

Type the part number '**WIDGET 123**' in the part number field and revision field type '**A**'. The part number field is always required and the revision field is usually used. The other text fields are mostly optional but for our sample quote will not be used.

### ENTER QUANTITIES BEING QUOTED ON

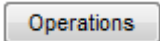
To enter quantities **Right Click** on the quantities grid and select **Quantities Quick Entry Screen** from the menu. A screen will be show where you can enter quantities of 1, 100, 500, and 1000. Also type in a markup of 10% in the mark up column. Click the ok button to close the quantity screen which will bring you back to the main quote screen showing the quantities in the bottom grid. You can change the quantities and markups in the grid at any time.



Quantity	Delivery	Mark Up
1	1	10.000
100	1	10.000
500	1	10.000
1,000	1	10.000
0	1	0.000
0	1	0.000

ENTER LABOR OPERATIONS

In order to enter operations which are required to manufacturer the part you must click on the



button which brings up the operations screen. Operations can be user defined with customer names, formulas and tables to match exactly your companie set of operations. Section 1 is your operation list to choose from. Section 2 is the selected operations for the quote. Section 3 is the shop rates for the selected operation and Section 4 is where you enter the values required by the formulas for setup and run time by operation.

Add the following operations

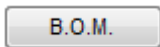
1. Double Click the Laser Operation and enter 15 minutes setup and 6 minutes run time.
2. Double Click the Press Brake and enter 15 minutes for setup and 2 minutes run time.

The screenshot shows the 'WIDGET 123' software interface. On the left is the 'Operation Pick List' with 'PRESS BRAKE' selected (marked with a '1'). The 'Chosen Operations' table shows 'LASER' and 'PRESS BRAKE' with their respective 'SU Time', 'SU Amount', 'RUN Time', and 'RUN Amount' (marked with a '2'). Below this is the 'Formula Variable Description' table with 'SU Time (MINUTES)' set to 15.00000 and 'Minutes Per Part' set to 2.00000 (marked with a '4'). At the bottom, the 'SU Rate' is \$35.00 and 'RUN Rate' is \$35.00 (marked with a '3'). Other fields include 'Employee's' (0), 'Markup %' (0.000), 'OH Rate' (\$0.00), and 'Machine Split' (1). An 'OK' button is visible at the bottom left.

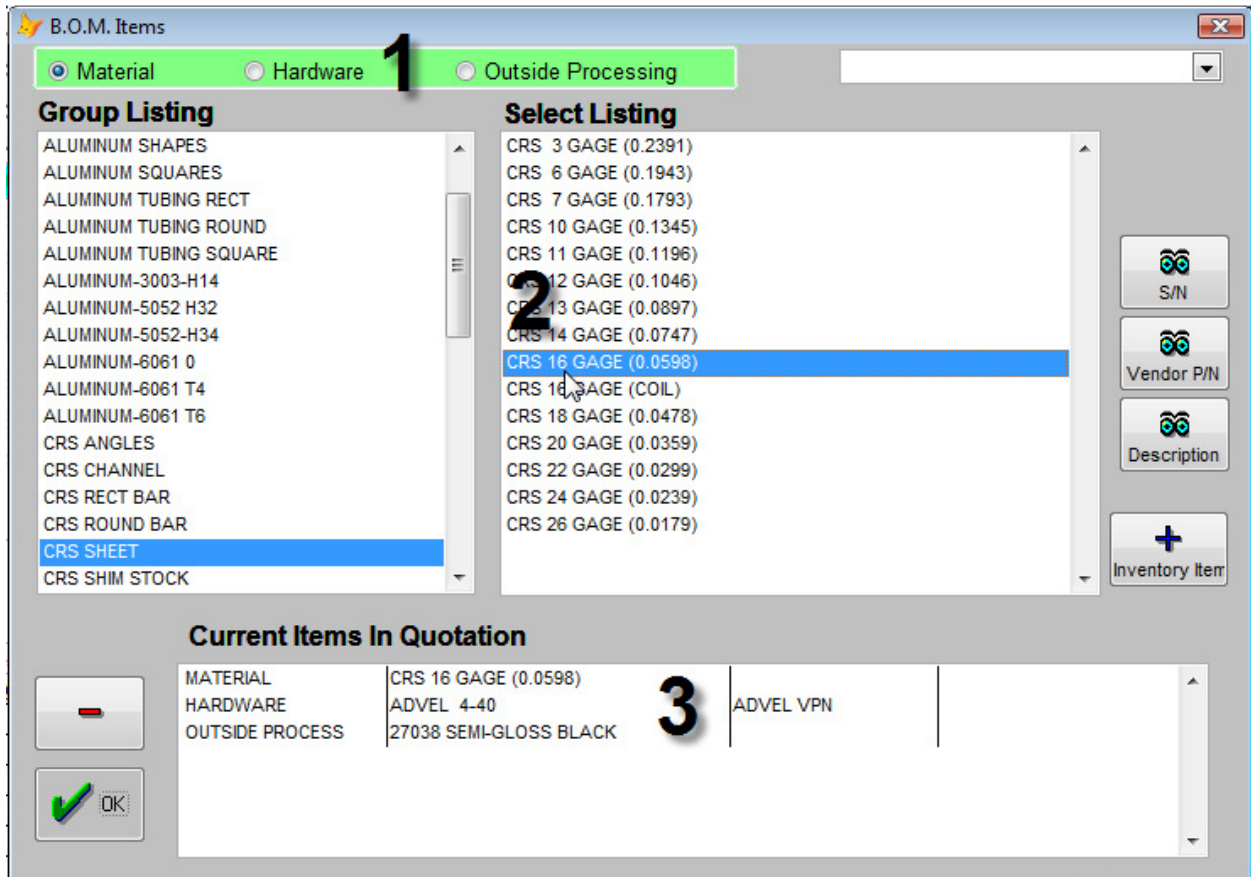
Once you have finished entering the operations you can click the ok button which brings you back to the main screen. You will see the prices automatically calculate as shown below.

Quantity	Margin %	Delivery	Unit Cost	Unit Sell	Total	M
1	10.000	1	\$44.9167	\$59.6296	\$59.6296	
100	10.000	1	\$11.5042	\$15.6296	\$1,562.9600	
500	10.000	1	\$11.2342	\$15.2741	\$7,637.0500	
1,000	10.000	1	\$11.2004	\$15.2296	15,229.6000	

ENTER BILL OF MATERIAL



Click on the **B.O.M.** button to enter the bill of material for this part. The screen is broken into 3 sections where section 1 is the type. You can select the type of bill of material item which can be Material, Hardware or Outside Processing. Section 2 are the groups and specific items in the groups. When a group is selected its items are shown in the right hand list box. Section 3 shows all the current bill of material items that are on the quote. You can edit any of the bills of material items by double clicking on the item in the list box.



**Add Material**

Click Material in section 1, CRS SHEET and then double click CRS 16 GAGE (0.0598) in section 2

Enter the part size of 10x10, blank size 10x10 and Parts per Blank of 4. The stock size being used is 48x120 with a price of 0.45 per pound. Click on the ok button to close the screen.

**Material Quotation**  
**CRS 16 GAGE (0.0598)**

Part Size : 10.000 X 10.000 Req : 1.00000 Qty On Hand  
Blank Size : 20.000 X 20.000 Qty Allocated  
Parts Per Blank : 4 Qty Ordered  
Stock Size : 48.000 X 120.000 Vendor Quotes Qty WIP

Thickness : 0.0598 Shipping Charges :  
Tolerance : 0.0000 Minimum Charge : \$0.00  
Safety Stock : 0.000 X 0.000  Against Grain  
 Certifications Rec

Breakouts	Prices	Markup
0	\$0.45000	25.000
1000	\$0.35000	20.000
0	\$0.00000	15.000

Sequence :  
Color :

**Add Hardware**

Click Hardware in section 1, AVDEL and then double click on ADVEL 4-40 in section 2.

Enter a quantity required of 2. This hardware item will have minimum of \$100 and price each is \$1.00.

**Hardware Quotation**  
**ADVEL 4-40**

Quantity Required : 2.00000 Qty On Hand  
Qty Per (Inverse) : 1 Qty Allocated  
Minimum : \$100.00 Qty Ordered  
Shipping Charges : Qty WIP

Breakouts	Prices	Markup
0	\$1.00000	25.000
0	\$0.00000	25.000
0	\$0.00000	25.000
0	\$0.00000	25.000

**Add Outside Processing**

Click Outside Processing in section 1, PAINTING and then double click 27038 SEMI-GLOSS BLACK in section 2

This example shows a price per square inch of \$0.15 with a 35% markup.

**27038 SEMI-GLOSS BLACK**

S/U Charge :  Part Size :  X   
 Minimum :  Sq. Inches Estimate or LBS :   
 Shipping Charges :  Overage Pieces :  Days Out :   
 Min Piece Price :

Breakouts	Prices	Markup
<input type="text" value="0"/>	<input type="text" value="\$0.01500"/>	<input type="text" value="35.000"/>
<input type="text" value="0"/>	<input type="text" value="\$0.00000"/>	<input type="text" value="35.000"/>
<input type="text" value="0"/>	<input type="text" value="\$0.00000"/>	<input type="text" value="35.000"/>
<input type="text" value="0"/>	<input type="text" value="\$0.00000"/>	<input type="text" value="35.000"/>
<input type="text" value="0"/>	<input type="text" value="\$0.00000"/>	<input type="text" value="35.000"/>

Vendor :   
 Sequence :   
 Calculation Type :

COMPLETED CALCULATIONS

The main screen and calculations will now include both labor and bill of material pricing as shown below.

Quantity	Margin %	Delivery	Unit Cost	Unit Sell	Total	Marku
1	10.000	1	\$147.3510	\$202.0663	\$202.0663	
100	10.000	1	\$15.9385	\$21.9552	\$2,195.5200	
500	10.000	1	\$15.4609	\$21.2708	10,635.4000	
1,000	10.000	1	\$15.4272	\$21.2264	21,226.4000	

FINAL STEP – PRINT THE DETAILED QUOTE



To print the detailed quote which again is for internal people, click on the button and select the Quotation Single Detail option in the list box

