



**MILLWORK DISTRIBUTORS, INC.**  
— Employee Owned and Operated —

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Oshkosh, WI 54903

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[www.mdi-oshkosh.com](http://www.mdi-oshkosh.com)

## MDI Online E-Catalog

We are now offering the MDI E-Catalog program available in an Online version – MDI Online E-Catalog. Here are a few advantages going to the online version.

- MDI will manage the following for your location:
  - Retailer Company Information (name, address, phone, fax, website, logo)  
*\*\*\* If you would like any of this information updated, please contact MDI to make changes – do not change in the Settings section from your computer, this would only update on your own quotes/orders. When we update, it would be for all users at your location. \*\*\**
  - User logins – each person at your location will be setup with their own User Name and password
  - The users name and email address will be added to the Settings
  - Your NET multipliers (giving you your cost from MDI on the ORDER FORMS)
- The USER will be able to access quotes from all USERS at your location.
- You will NOT have to run any updates. When there is an update to the program, the next time you log-on, it will already be updated.

### What you will need to do...

#### MARK-UP or MARGINS

You can decide if you want your QUOTE FORM to show MDI LIST price, or your price to your customer based on the markup or margin you prefer.

If you want to leave the QUOTE FORM showing MDI List prices, then you do not need to do the following steps, and can leave the RETAIL column as 1 in the Settings-Multipliers section.

If you would like to setup a markup or margin per category that would be the same for any customer you enter a quote for, you can set that up in the Settings section, Multipliers. NOTE – this will apply the same markup/margin for ALL the quotes you enter. If you want to setup different markups/margin for different customers, then make sure to leave the RETAIL column as 1 in the Settings/Multipliers. If you enter a Retail multiplier in both the Settings – Multiplier section, and the Customer Discounts section, it will apply BOTH multipliers. Be sure to only enter in one section.

## Settings – Multipliers

X  
MULTIPLIERS

Click to set Multipliers!

**Tax Rate:**  %

(Example: For 6.5% enter 6.5)

**Allow access to Order Form (Net Pricing).**

**Allow Manual Price Adjustments**

This is an example of the Exterior Doors, with a base discount of 42%. The Net column will already be entered by MDI. The Retail column will be at 1 (this means MDI List X 1 = price on quote)

Leaving the Retail column as 1 will leave the prices on the Quote Form at the MDI List Price.

**Product Category:** Exterior Door Exit

Net = Your Cost (Used on Order Form).  
Retail = Your Sell Price (Used on Quote Form).

Category	Net	Retail	Markup	Margin
Classic Craft Canvas	0.58	1	72%	42%
Classic Craft Fir Grain	0.58	1	72%	42%
Classic Craft Mahogany Grain	0.58	1	72%	42%
Classic Craft Oak Grain	0.58	1	72%	42%
Classic Craft Walnut Grain	0.58	1	72%	42%
Fiber-Classic Mahogany	0.58	1	72%	42%
Fiber-Classic Mahogany - Pulse	0.58	1	72%	42%
Fiber-Classic Mahogany - Shaker-Style	0.58	1	72%	42%
Fiber-Classic Oak	0.58	1	72%	42%
Fiber-Classic Oak - Flush Glazed	0.58	1	72%	42%
Fiber-Classic Oak - Pulse	0.58	1	72%	42%
MDI Series	0.58	1	72%	42%
Profiles High Definition	0.58	1	72%	42%
Profiles High Definition - Pulse	0.58	1	72%	42%
Smooth-Star	0.58	1	72%	42%
Smooth-Star - Flush Glazed	0.58	1	72%	42%
Smooth-Star - Pulse	0.58	1	72%	42%
Smooth-Star Shaker-Style	0.58	1	72%	42%
Traditions Steel	0.58	1	72%	42%
Traditions Steel - Pulse	0.58	1	72%	42%

If you want to enter all quotes for Exterior Doors with a 25% margin (for example), you would enter 25% under the Margin, and it will change the Retail multiplier for you.

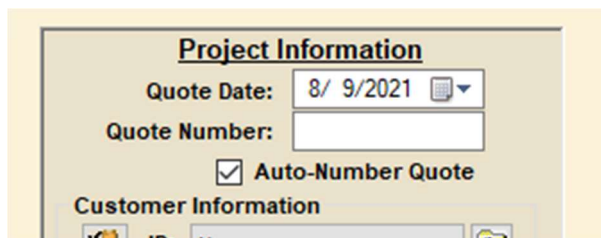
**Product Category:** Exterior Door Exit

Net = Your Cost (Used on Order Form).  
Retail = Your Sell Price (Used on Quote Form).

Category	Net	Retail	Markup	Margin
Classic Craft Canvas	0.58	0.7733	33%	25%
Classic Craft Fir Grain	0.58	0.7733	33%	25%
Classic Craft Mahogany Grain	0.58	0.7733	33%	25%
Classic Craft Oak Grain	0.58	0.7733	33%	25%
Classic Craft Walnut Grain	0.58	0.7733	33%	25%
Fiber-Classic Mahogany	0.58	0.7733	33%	25%
Fiber-Classic Mahogany - Pulse	0.58	0.7733	33%	25%
Fiber-Classic Mahogany - Shaker-Style	0.58	0.7733	33%	25%
Fiber-Classic Oak	0.58	0.7733	33%	25%
Fiber-Classic Oak - Flush Glazed	0.58	0.7733	33%	25%
Fiber-Classic Oak - Pulse	0.58	0.7733	33%	25%
MDI Series	0.58	0.7733	33%	25%
Profiles High Definition	0.58	0.7733	33%	25%
Profiles High Definition - Pulse	0.58	0.7733	33%	25%
Smooth-Star	0.58	0.7733	33%	25%
Smooth-Star - Flush Glazed	0.58	0.7733	33%	25%
Smooth-Star - Pulse	0.58	0.7733	33%	25%
Smooth-Star Shaker-Style	0.58	0.7733	33%	25%
Traditions Steel	0.58	0.7733	33%	25%
Traditions Steel - Pulse	0.58	0.7733	33%	25%

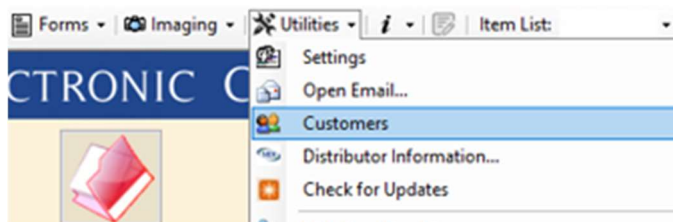
## AUTO-NUMBER QUOTE

If you want the program to automatically assign a Quote Number, make sure the box next to Auto-Number Quote is checked. This is located on the Home Page, under Project Information. It will start with Quote #1, then 2, and so forth. It will assign the Quote # as soon as you either View/Print the Quote, or Save. If you leave the check box unchecked, you will need to enter your own Quote number, otherwise it will not assign a quote number at all.



## ADD CUSTOMERS

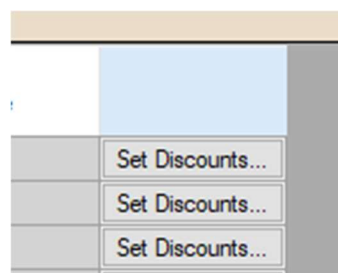
To add your Customers in the program, from the top menu bar, select Utilities – Customers



Click the Add New Customer button, then enter their information in the first available row.



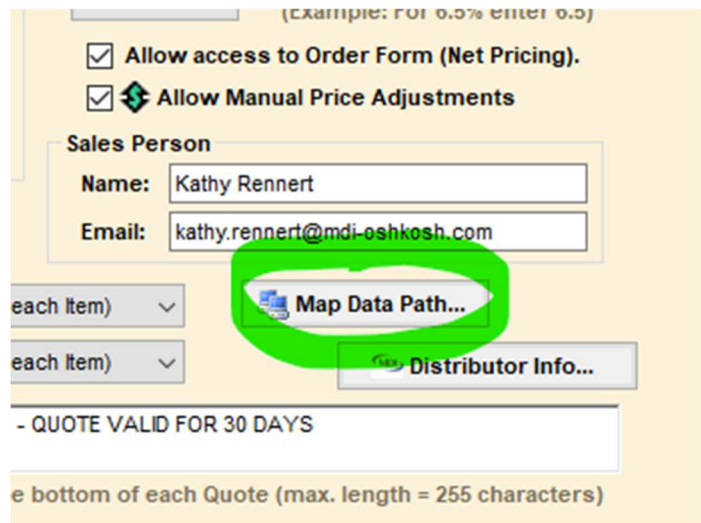
Select the "Set Discounts" button on the far right.



Then choose the Product Category from the dropdown, and enter the Markup or Margin you want for that customer.

## CREATE FOLDER TO SAVE PDF OF QUOTES

In Settings – select Map Data Path



(Example: For 6.5% enter 6.5)

Allow access to Order Form (Net Pricing).

Allow Manual Price Adjustments

**Sales Person**

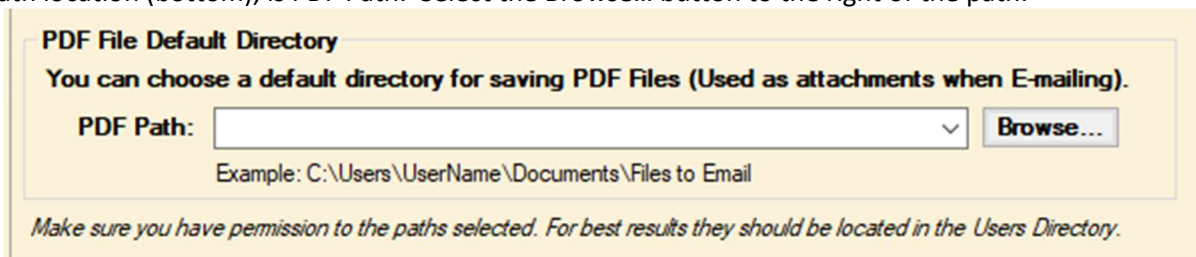
Name:

Email:

- QUOTE VALID FOR 30 DAYS

at the bottom of each Quote (max. length = 255 characters)

The 3<sup>rd</sup> path location (bottom), is PDF Path. Select the Browse... button to the right of the path.



**PDF File Default Directory**

You can choose a default directory for saving PDF Files (Used as attachments when E-mailing).

PDF Path:

Example: C:\Users\UserName\Documents\Files to Email

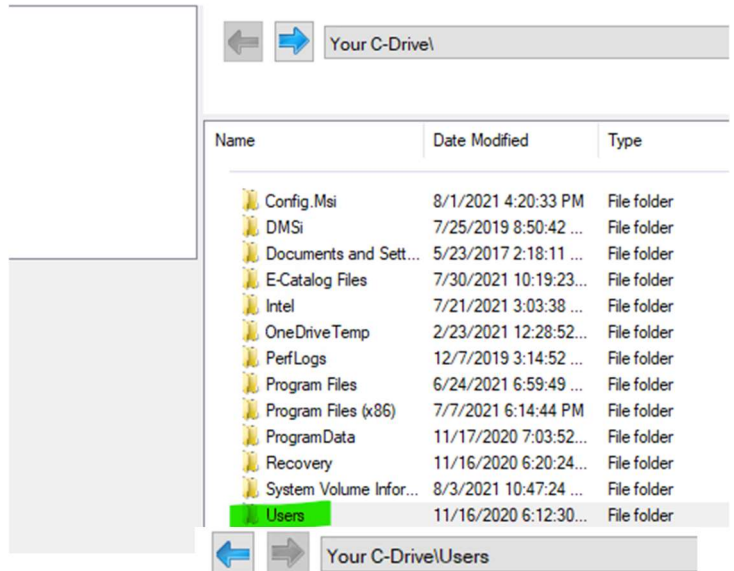
*Make sure you have permission to the paths selected. For best results they should be located in the Users Directory.*

Then in the upper left-hand corner, select "Your C-Drive"

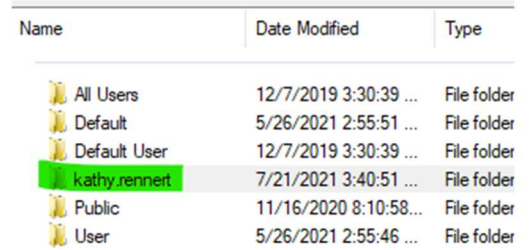


You can decide if you want to use the E-Catalog Files folder directly in the C drive, or you can create a folder on your Desktop. It might be easier to locate the PDF files later if it is on your desktop.

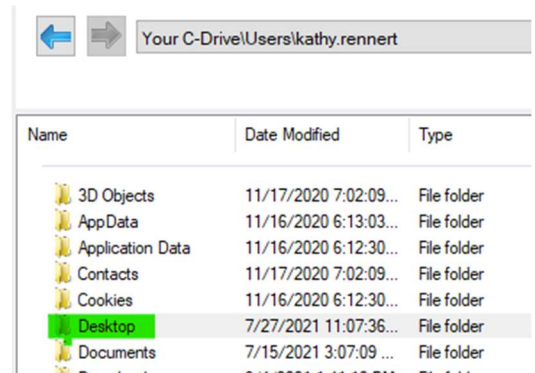
To create a folder on your Desktop, go to Users



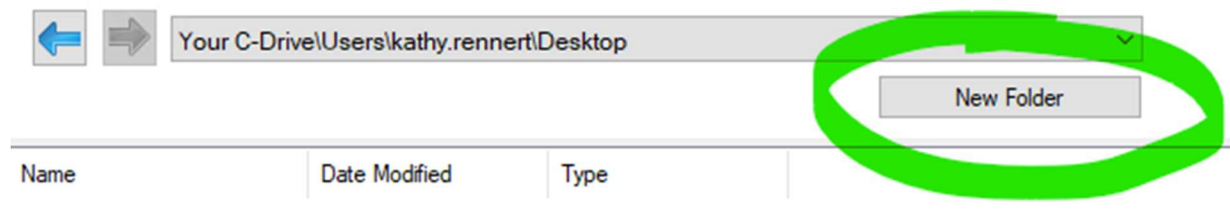
Your name



Desktop



Then select New Folder button

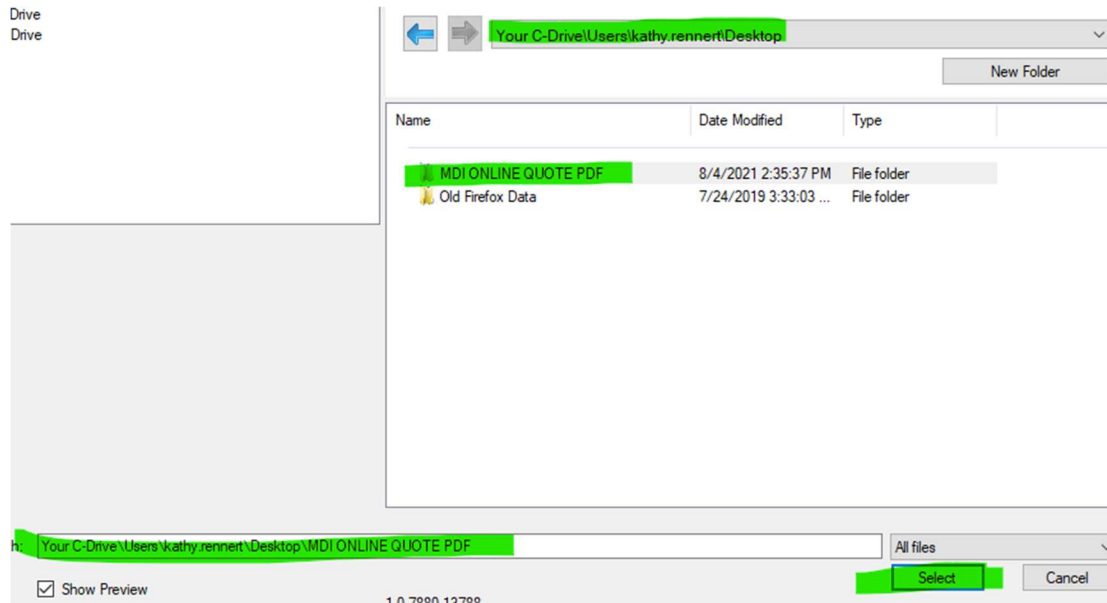




Rename “new folder” to whatever you want. Example: “MDI ONLINE QUOTE PDF”



Then select that folder \*\* just click once to select – do NOT double-click to open the folder \*\*



My PDF Path is: Your C-Drive\Users\kathy.rennert\Desktop\MDI ONLINE QUOTE PDF

Then click on the Select button on the bottom right-hand corner.

It will then go back to the Map Data Path screen, and you can see the PDF Path you selected.

Now when you create a PDF, it will automatically go to this folder to save.

**Data Path**  
Specify the Path for the "Data" Folder you want to link to each time you use the Configurator.  
(Contains data files including Company Information, Customer Database, and Multipliers.)

**Data Path:** Server Drive\Millwork Distributors E-Catalog\MDI Users\kathy.rennert@mdi **Browse...**  
Example: D:\Millwork Distributors E-Catalog\MDI Users\kathy.rennert@mdi-oshkosh.com  
(Needs to be a local or network path that contains the "Data" folder with the "GroupInfo.md" file.)

**Product Default Settings**

Set Path for Global Product Default Settings to same as Data Path ?  
 Set Path for Customer Product Default Settings to same as Data Path

**Project Files Default Directory**  
Specify the default directory where you want the Projects saved.  
(This is also the default directory used when opening Projects) **Same as Data Path**

**Project Path:** Server Drive\Millwork Distributors E-Catalog\MDI Users\kathy.rennert@mdi **Browse...**  
Example: D:\Millwork Distributors E-Catalog\MDI Users\kathy.rennert@mdi-oshkosh.com  
(Needs to be a local or network path that contains the "Projects" folder.)

**PDF File Default Directory**  
You can choose a default directory for saving PDF Files (Used as attachments when E-mailing).

**PDF Path:** Your C-Drive\Users\kathy.rennert\Desktop\MDI ONLINE QUOTE PDF **Browse...**  
Example: C:\Users\UserName\Documents\Files to Email

*Make sure you have permission to the paths selected. For best results they should be located in the Users Directory.*

## SAVING QUOTES

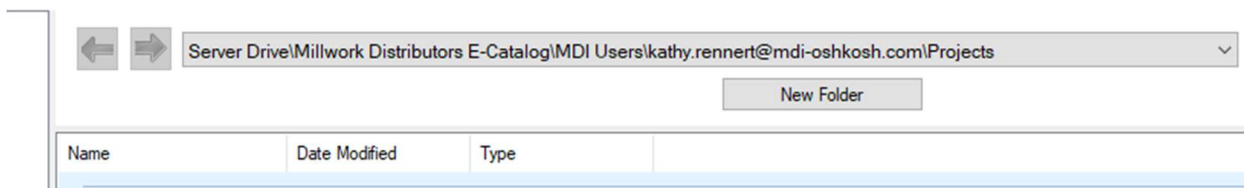
After you have entered a quote, you can save by clicking on the Save (floppy disc icon) in the top menu bar.



It will then show you the Quote Number (\*\* ONLY if the Auto-Number Quote Box is checked under the Project Information on the Home Page).

A dialog box titled "Auto Quote Number" with a close button (X) in the top right corner. It contains a label "Quote Number:" followed by a text input field. To the right of the input field are two buttons: "OK" and "Cancel". Below the input field is a small icon of a floppy disc.

It will save your quotes in your own folder. Below is an example of mine. It is under Server Drive\Millwork Distributors E-Catalog\MDI Users\kathy.rennert@md-oshkosh.com\Projects (for you it would have your company name instead of MDI Users, and your email address)



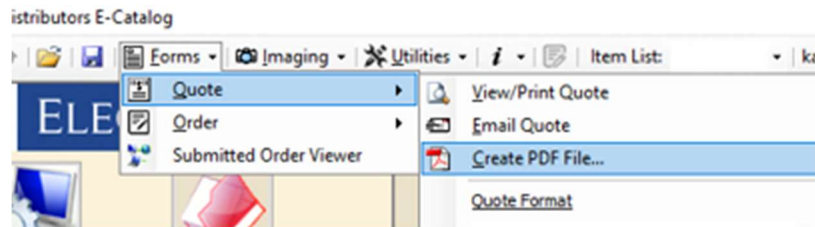
If you selected a Customer when creating the Quote, it will name the file "Customer Name + Quote Number". The example below was for customer TEST CUSTOMER, and the quote number 7.

A screenshot of a file save dialog box. The "File name:" field contains the text "TEST CUSTOMER 7.ecp". Below the field is a checked checkbox labeled "Show Preview". In the bottom right corner, the file size "1.0.788" is displayed.

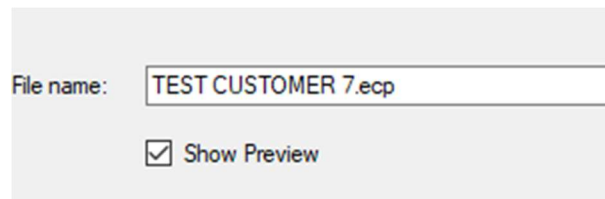
**If you are going to create a PDF**, then at this time, before clicking on SAVE, you can select and copy the File Name. Then click on Save.

## CREATE A PDF

From top menu bar, select Forms – Quote – Create PDF File



This will bring up the Save As box to name the PDF. If you copied the File Name when saving the quote, you can click in the File name box, and paste. Then your Quote File and PDF File will have the same name. Otherwise, you can name the PDF whatever you would like. It will NOT automatically fill in a file name for you.



## EMAIL A PDF QUOTE TO YOUR CUSTOMER

Open your email, and start a new email. Attach file as you normally would. The PDF will be located in your C Drive, on your Desktop, in the folder you created earlier. Or whichever folder you chose when setting up the PDF Path.



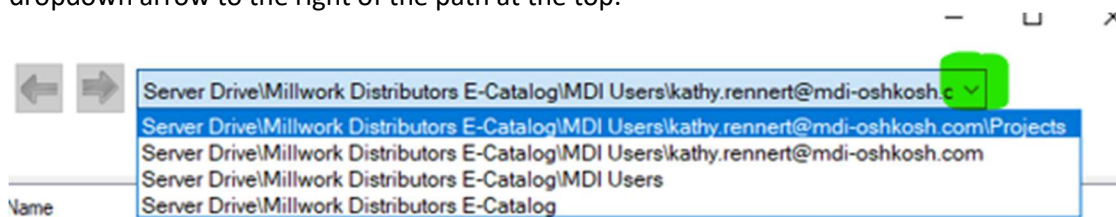
## OPEN A PROJECT

To open a project you had originally created, go to Open a Project on the home page, or the open folder icon in the top menu bar.



It will default to open your projects in your folder. Click on the project file you want to open.

If you want to open a project that a **different user at your location** had entered, then click on the dropdown arrow to the right of the path at the top.



Select Server Drive\Millwork Distributors E-Catalog\Your Company Name (MDI Users for us)

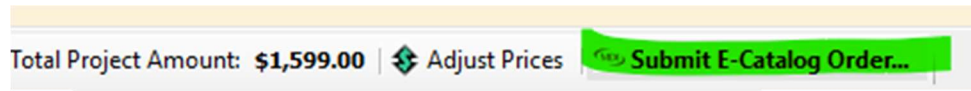
Double click on the users email address, then click on their Projects folder

Name	Date Modified	Type
Columns and Posts	4/9/2021 11:15:41 ...	File folder
Common	4/9/2021 11:15:41 ...	File folder
Data	7/23/2021 4:35:25 ...	File folder
Exterior Doors	4/9/2021 11:15:41 ...	File folder
GD Frames	4/9/2021 11:15:41 ...	File folder
Interior Doors	4/9/2021 11:15:41 ...	File folder
Misc Items	4/9/2021 11:15:41 ...	File folder
Moulding	4/9/2021 11:15:41 ...	File folder
Projects	7/27/2021 1:47:46 ...	File folder
Stair Parts	4/9/2021 11:15:41 ...	File folder

You can then select which of that user's quotes you would like to open.

## SUBMIT ORDER TO MDI

After you have finished entering a quote, and saving it (or open a previously created quote), you can select the “Submit E-Catalog Order” button on the bottom task bar.



Enter in the required fields

Customer Name/Account #: enter your company name

Customer City: enter your location

Ordered By: enter your name

PO #: enter your PO #

Job Name: enter the job name

Submit E-Catalog Order

### E-Catalog Order Information

Customer Name/Account #: MY COMPANY NAME (required)

Customer City: MY CITY

Ordered By: Kathy Rennet (required)

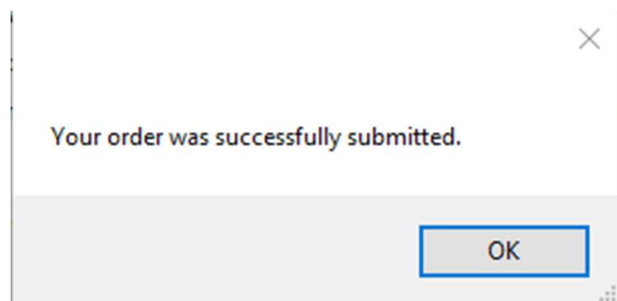
Comment:

PO #: 12345 PO NUMBER (required)

Job Name: MY JOB NAME (required)

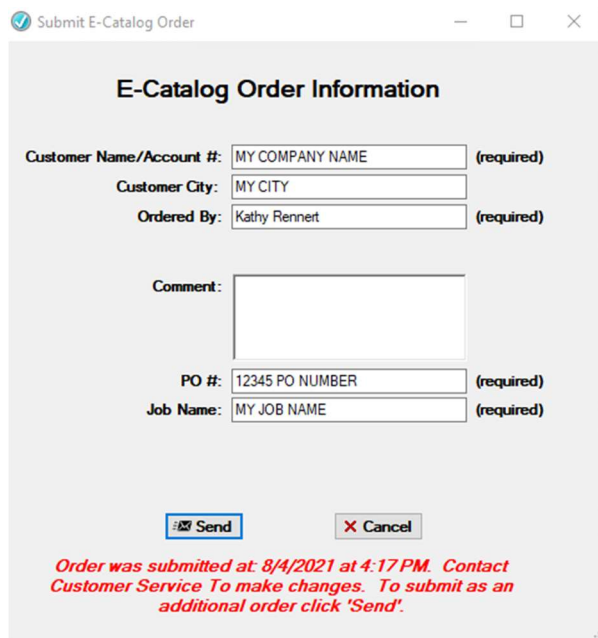
Send Cancel

Then select the Send button. It will pop-up “Your order was successfully submitted.”



## CHECK IF YOU SUBMITTED ORDER TO MDI

If you aren't sure if you already submitted an order, there are two ways to check. You can select the Submit E-Catalog button again, and if it was already sent it will have a note in red on the bottom when the order was previously submitted.

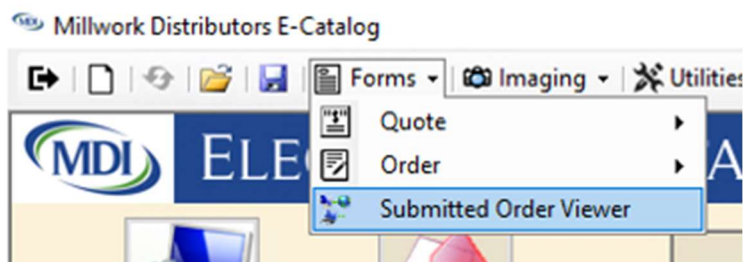


The screenshot shows a window titled "Submit E-Catalog Order" with the following fields and buttons:

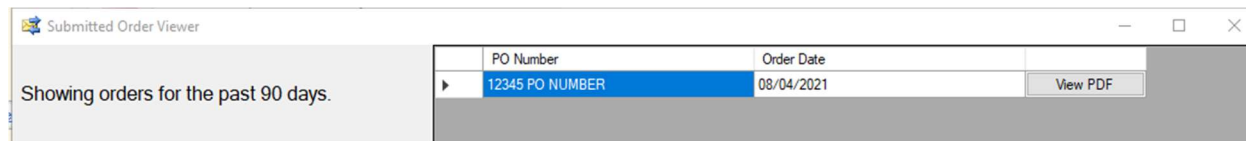
- Customer Name/Account #: MY COMPANY NAME (required)
- Customer City: MY CITY
- Ordered By: Kathy Rennert (required)
- Comment: (empty text area)
- PO #: 12345 PO NUMBER (required)
- Job Name: MY JOB NAME (required)
- Buttons: Send, Cancel

At the bottom, a red notification message reads: "Order was submitted at: 8/4/2021 at 4:17 PM. Contact Customer Service To make changes. To submit as an additional order click 'Send'."

You can also check to see if an order was submitted, or when it was submitted, by going to top menu bar, Forms – Submitted Order Viewer



This will bring up all orders that have been submitted in the past 90 days.



The screenshot shows the "Submitted Order Viewer" window with the following table:

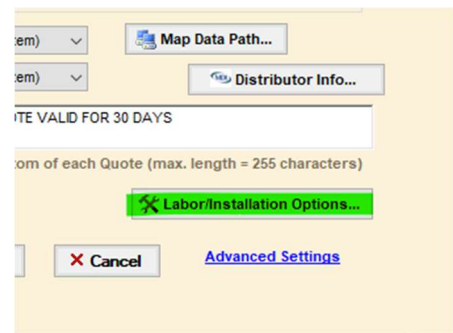
PO Number	Order Date	
12345 PO NUMBER	08/04/2021	View PDF

Text below the table: "Showing orders for the past 90 days."

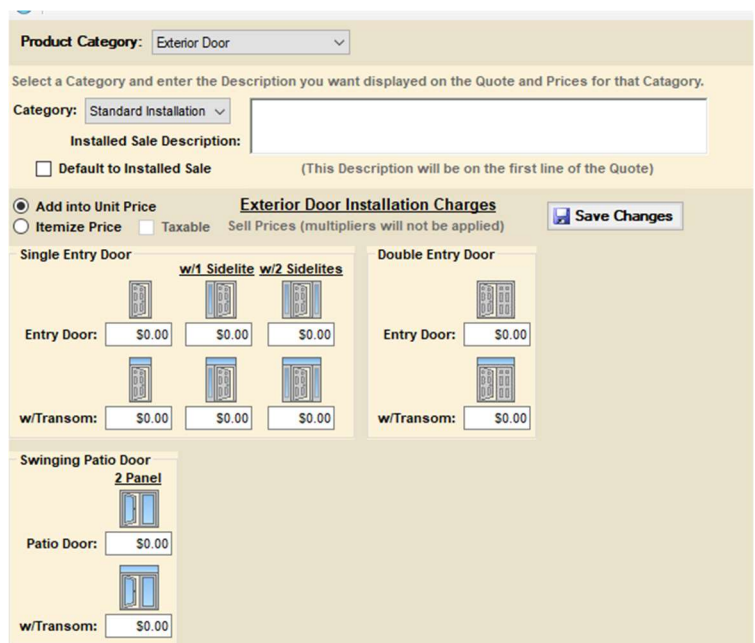
You can see the PO Number, Order Date, and view the PDF that was submitted.

## LABOR/INSTALLATION CHARGES

You can have the program add your labor/installation charges to be applied to your quotes to your customers.  
Go to Settings – Labor/Installation Options



You can enter your charge (multipliers will NOT be applied to these prices) to install by the different configurations shown. You may also add your own Category to have multiple price sets.



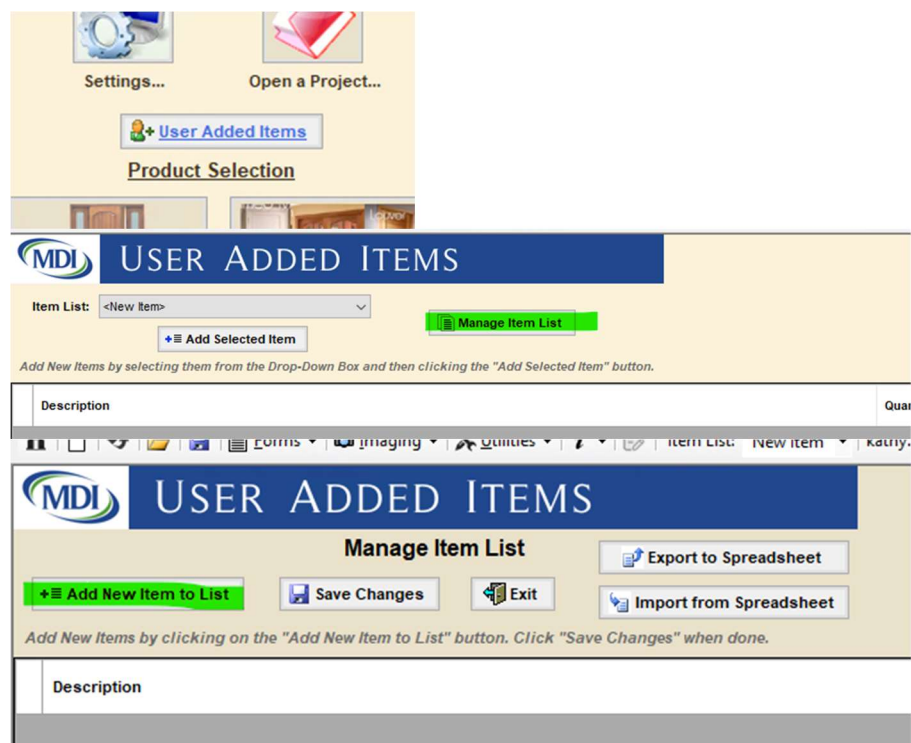
Once you have these set, you can add this option to your door unit when entering. Go to the Order Info tab, check the Installed Sale box, then select the Category from the drop-down.



## USER ADDED ITEMS

You can add your own Items to be used in the program (ex. Handle sets from your store, any other product you want to include on the quote or order that is not in the program)

From the Home page, go to User Added Items (or on bottom menu bar, New Item – User Added Items) – then Manage Item List – Add New Item to List



Enter your description, Net Price (for Orders) or Retail Price (for your quote to customer). Be sure to check if it should be Include on Quote, or Include on Order. \*\*\* NOTE - multipliers will NOT be applied to these prices \*\*\*

Save Changes, and Exit. Then select the new item from the dropdown list by Item List, select it, then hit Add Selected Item. It will then be in the box below, you can change the quantity, and then click on Add Item to Project in bottom menu bar.

## THANK YOU

We appreciate your business, thank you for choosing to use MDI Online E-Catalog. Please let us know if you have any questions or need help in setting anything up.