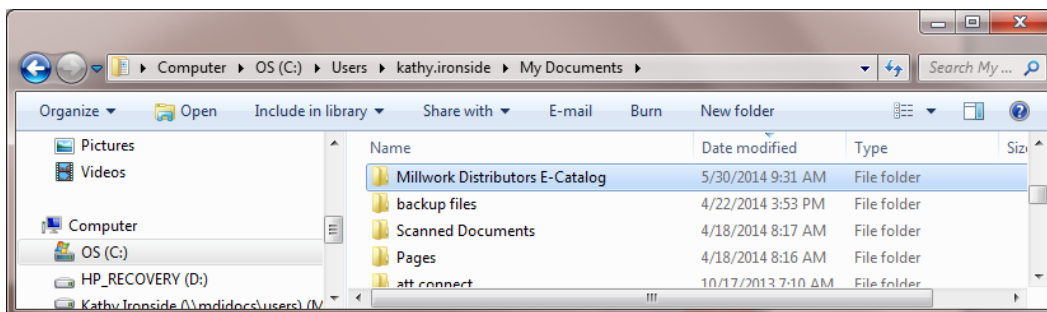
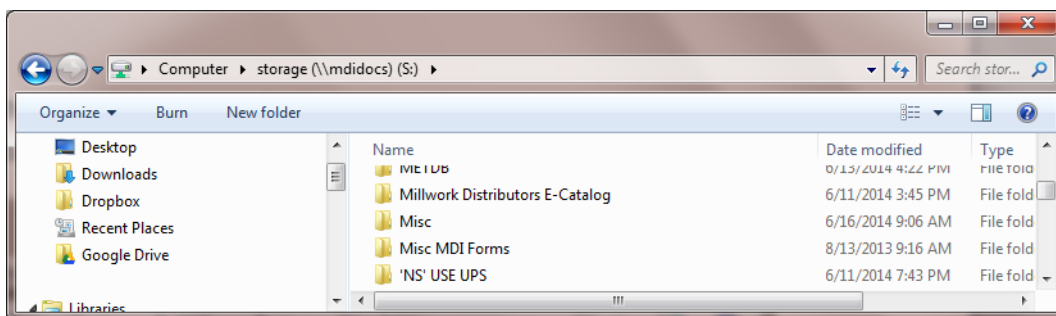


To share information and quotes on a network

After the program is installed on a computer, open a windows folder – go to C:\Users\users name\My Documents – or go to My Documents - locate the Millwork Distributors E-Catalog folder

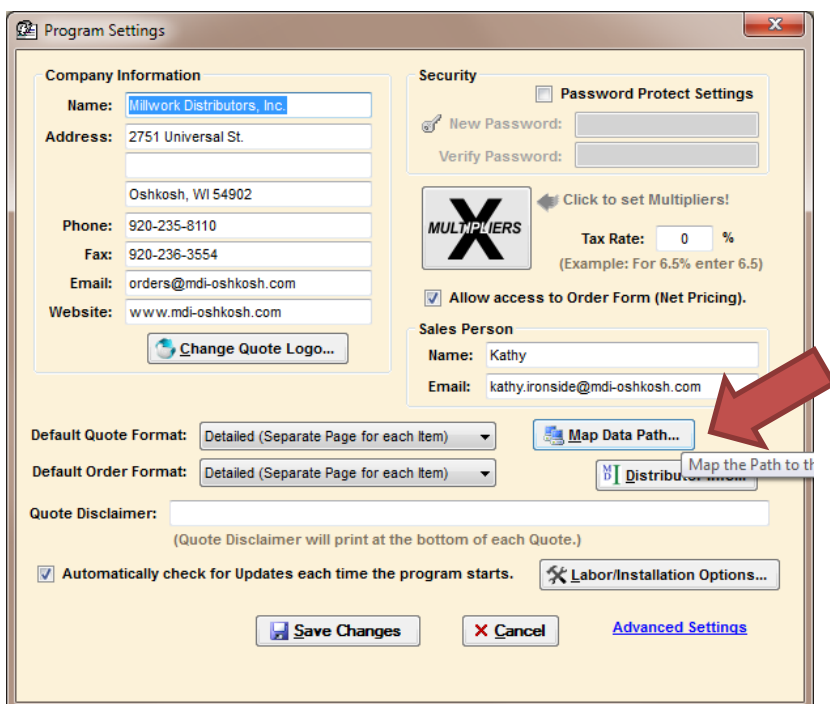


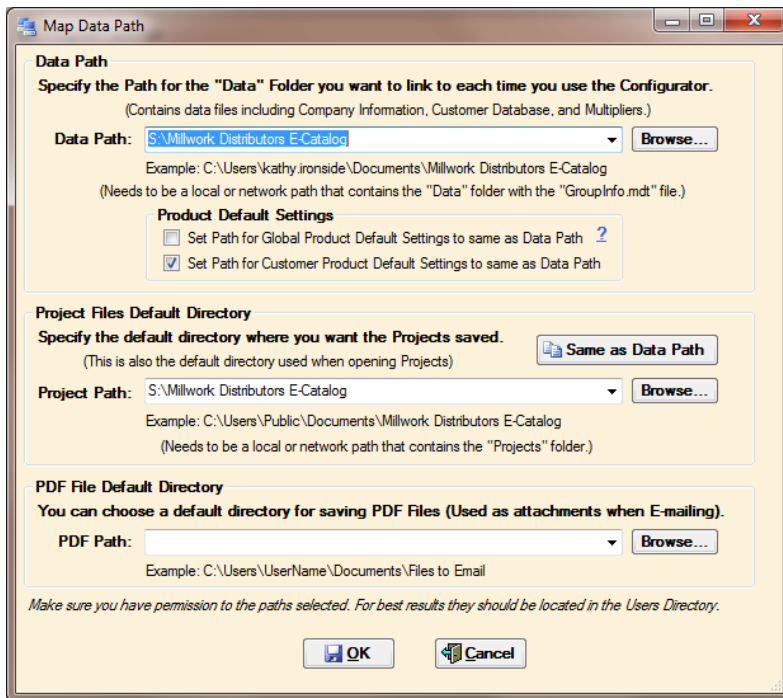
Then open a separate windows folders – go to the shared network server –



With both windows open – click on the Millwork Distributors E-Catalog folder from the user's location, and drag to the shared location. This will copy that folder onto the shared drive.

Open MDI E-Catalog – go to Settings – then Map Data Path





Map Data Path

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: S:\Millwork Distributors E-Catalog Browse...

Example: C:\Users\kathy.ironside\Documents\Millwork Distributors E-Catalog
 (Needs to be a local or network path that contains the "Data" folder with the "GroupInfo.mdt" 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)

Project Path: S:\Millwork Distributors E-Catalog Browse... Same as Data Path

Example: C:\Users\Public\Documents\Millwork Distributors E-Catalog
 (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: Browse...

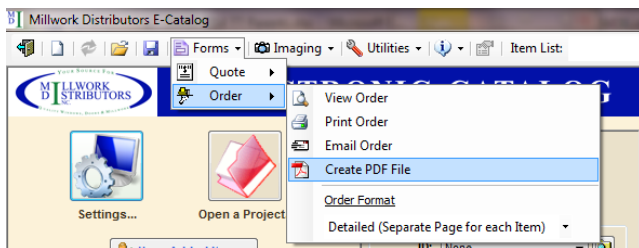
Example: C:\Users\UserName\Documents\Files to Email

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

OK Cancel

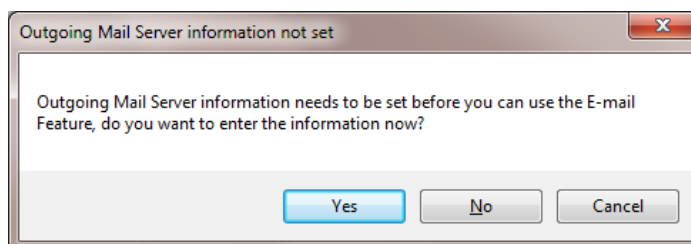
Click on Browse – then locate the Millwork Distributors E-Catalog folder in the shared drive. Data Path – is for the company information, multipliers, and customer database. The second one – Project Path – is for saving quotes. If they want everything shared, then just click on “Same as Data Path” under the Project Path.

The PDF File Default Directory – this is if you want to have one folder where you save all PDFs to then be attached to an email. For example, you can create a folder on the desktop for “orders to email to MDI”. Then under PDF Path, select that location. When you go to Forms – Order – Create PDF File - it will save the PDF to that folder.



Set-up outgoing email

There is an option to send orders by email directly from the program. The user would go to Forms – Order – Email Order.



The first time they do this, they will see this -

 A dialog box titled "Email Configuration" with a gear icon in the top left corner. It contains several input fields: "Email Address:", "Password:" (with a hint "Enter your email password here"), "User Name (typically your email address or the portion of your email address before the '@' symbol):", and "SMTP Server:". There is also a "Port:" dropdown menu set to "25" and a checkbox for "Require Secure Socket Layer (SSL)". At the bottom, there are "Auto Configure" and "Configure Manually" links, a "Test Manual Settings" button, and "Ok" and "Cancel" buttons.

Click on Yes – then you will see this -

They will need this information (the SMTP Server and Port #)

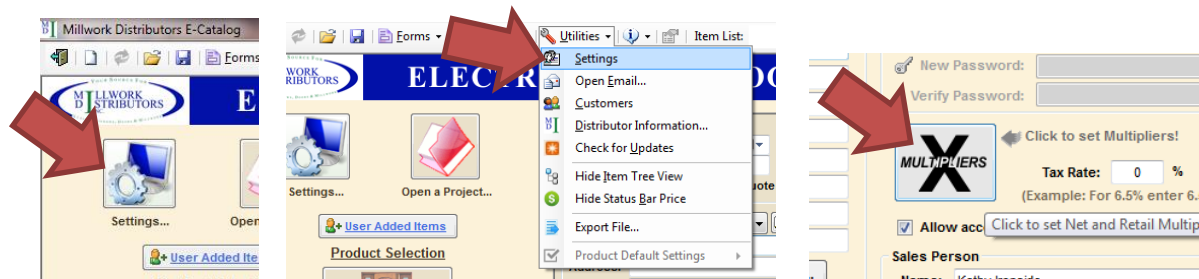
Once this information is stored, the next time they click on Forms – Order – Email – it will just bring up the email box

 An "Email" composition window. The top menu bar includes "Exit", "E-mail Settings", "Open Email Log", "Print E-mail", and "Template Key Words". The "From:" field is set to "kathy.ironside@mdi-oshkosh.com" and the "To:" field is "orders@mdi-oshkosh.com". The "Subject:" is "Order". The "Attachment:" is "Order.pdf". There are "Add..." and "Remove" buttons for attachments. A checkbox "Include Project File (.ecp file that can be opened using E-Catalog Program)" is checked. Below the attachment section, there are dropdowns for "Email Type:" (set to "Order") and "Template:" (set to "Basic Message"), along with a "Save Template" button. A checkbox "Show Template Message in Design Mode (Displays Keywords in selected Template)" is also present. The "Message:" area contains the text "Millwork Distributors, Attached is an E-Catalog Order. Thank You," and a "Reset" button. A red error message at the top right says: "Outgoing Mail Server Information not Set! (Click on the 'E-mail Settings' button to set)".

Setting up Multipliers

To set multipliers for both your Cost for orders (Net) and your price to your customer (Retail).

Go to Settings from the Home page (or Utilities from the top menu bar, then Settings) – then Multipliers



Product Category: Misc Items

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

Category	Net	Retail
Classic-Craft Oak	1	1
Classic-Craft Rustic	1	1
Color Guard	1	1
Fiber-Classic Oak	1	1
Fypon	1	1
Iron-A-Way	1	1
Misc Windows	1	1
OH Clad Frames	1	1
Pocket Door Frame	1	1
Windsor ND	1	1

☐ Password Protect Net Multipliers

Password: Verify Password:

Product Category: Exterior Door

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

Category	Net	Retail
Classic-Craft American Style	1	1
Classic-Craft Canvas	1	1
Classic-Craft Mahogany	1	1
Classic-Craft Oak	1	1
Classic-Craft Rustic	1	1
Fiber-Classic Mahogany	1	1
Fiber-Classic Mahogany - Pulse	1	1
Fiber-Classic Oak	1	1
Fiber-Classic Oak - Flush Glazed	1	1
Fiber-Classic Oak - Pulse	1	1
MDI Series	1	1
Profiles High Definition	1	1
Profiles High Definition - Pulse	1	1
Smooth-Star	1	1
Smooth-Star - Flush Glazed	1	1
Smooth-Star - Pulse	1	1
Steel Edge	1	1
Traditions Steel	1	1
Traditions Steel - Pulse	1	1

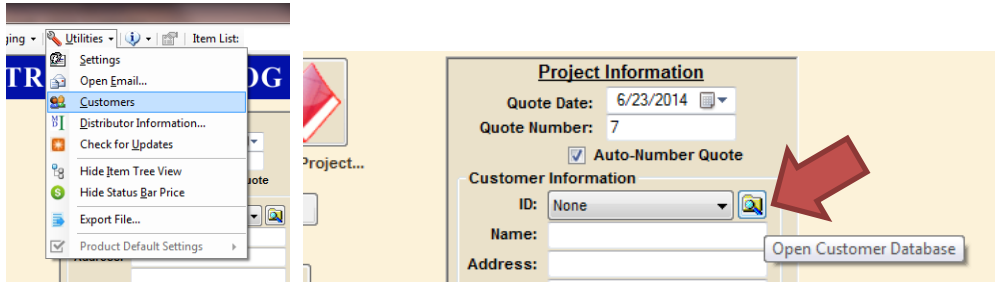
☐ Password Protect Net Multipliers

Password: Verify Password:

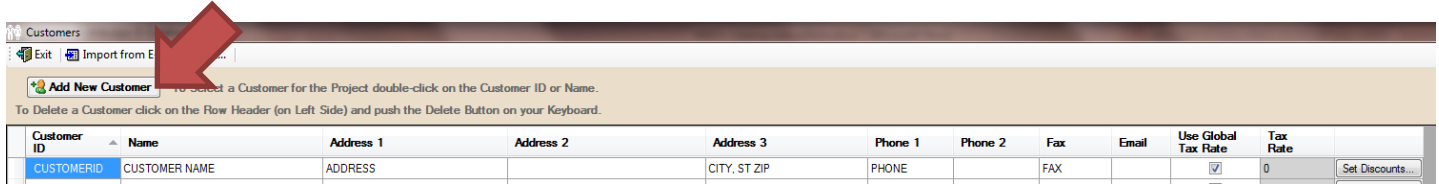
Start by selecting the Product Category, then you can enter your MDI discount multiplier under “Net”, this will show you your cost from MDI when your view or print Orders. You can also set a multiplier to achieve a price for your customers. This will apply this multiplier to all the quotes/orders you enter. You will also have the option to set individual multipliers per customer in the Customers database. If you want prices left as List Prices, then leave these multipliers as “1”.

Customer Database

To setup your customers, go to Utilities in top menu bar, then Customers (or from the Home page, under Customer Information, next to ID: None – the folder icon). Here you can add the customer information and their individual discounts (multipliers).

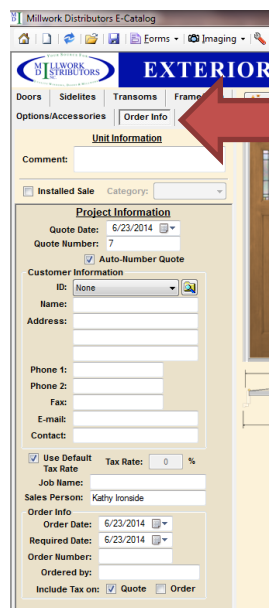
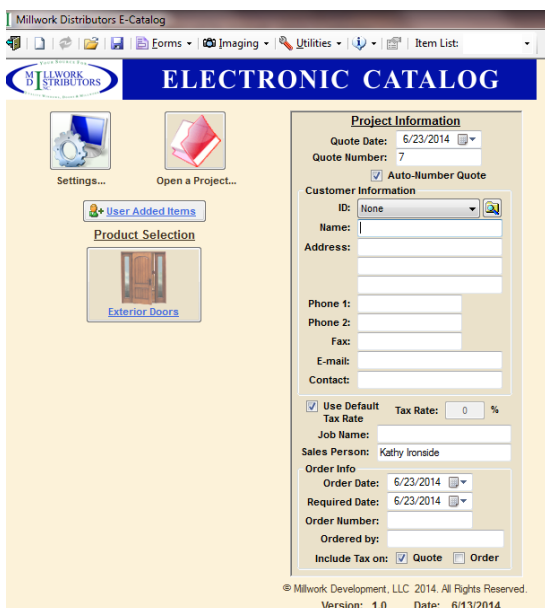


Click on Add New Customer, then double-click in the boxes to add customer information.



This is where you can also setup a discount for each customer by clicking on Set Discounts. Note, any discounts entered here are an additional discount added to any discounts entered under Settings - Multipliers.

If you do not need to save the customer information to be used on future quotes, you do not need to add them to the customer database. Just enter their information under the Customer Information box on the Home Page, or under Order Info after you have started a quote.



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

Program Settings

Company Information
Name: Millwork Distributors, Inc.
Address: 2751 Universal St.
Oshkosh, WI 54902
Phone: 920-235-8110
Fax: 920-236-3554
Email: orders@mdi-oshkosh.com
Website: www.mdi-oshkosh.com

Security
Password Protect Settings
New Password:
Verify Password:
Click to set Multipliers!
Tax Rate: 0 %
(Example: For 6.5% enter 6.5)
☒ Allow access to Order Form (Net Pricing).

Sales Person
Name: Kathy Ironside
Email: kathy.ironside@mdi-oshkosh.com

Default Quote Format: Detailed (Separate Page for each item)
Default Order Format: Detailed (Separate Page for each item)

Quote Disclaimer: SUBJECT TO OFFICE APPROVAL - QUOTE VALID FOR 30 DAYS
(Quote Disclaimer will print at the bottom of each Quote.)
☒ Automatically check for Updates each time the program starts.

Labor/Installation Options

Labor Options

Product Category: Exterior Door
Select a Category and enter the Description you want displayed on the Quote and Prices for that Category.
Category: Standard Installation
Installed Sale Description:
(This Description will be on the first line of the Quote)
☐ Default to Installed Sale

Exterior Door Installation Charges

☒ Add into Unit Price ☐ Itemize Price ☐ Taxable Sell Prices (multipliers will not be applied)

Single Entry Door			Double Entry Door	
	w/1 Sidelite	w/2 Sidelites		
Entry Door:	\$0.00	\$0.00	Entry Door:	\$0.00
w/Transom:	\$0.00	\$0.00	w/Transom:	\$0.00

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 that. Go to the Order Info tab, check the Installed Sale box, then select the Category from the drop-down.

Millwork Distributors E-Catalog

Forms Imaging Utilities Item List

EXTERIOR DOORS

Doors Sidelites Transoms Frame/Trim Wizard

Options/Accessories Order Info

Unit Information
Comment:
☒ Installed Sale Category: Standard Installation

Project Information
Quote Date: 6/23/2014
Quote Number: 7
☒ Auto-Number Quote

Customer Information
ID: None
Name:
Address:
Phone 1:
38 3/8" (R.O.)

This is how it will appear on your quote. If you enter something in the Installed Sale Description box, that is what will be displayed on the quote, instead of "Installed Sale: Standard Installation".

O.M. of Exterior Trim = 40 1/4" x 83 5/16"

Installed Sale

Item Description	Qty	Price	Extended
Installed Sale: Standard Installation	1	10.00	\$10.00
3' 0" x 6' 8" CCA2141D Classic-Craft American Style Fiberglass Door w/Hazelton Black	1	2,551.00	\$2,551.00

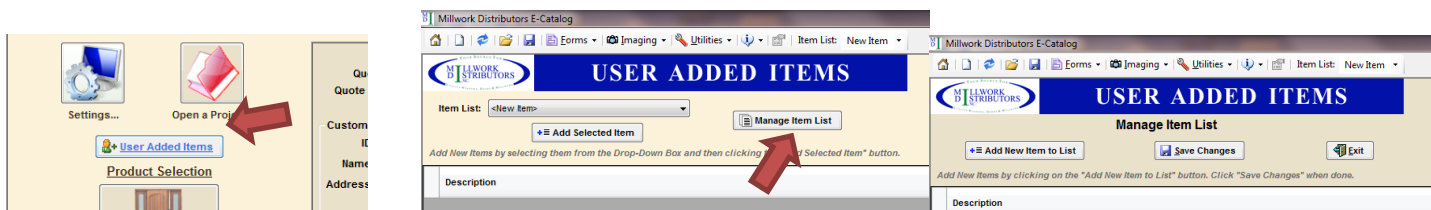
Exterior
40 1/4" (O.M.)

Image is viewed from Exterior!

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 drop down 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.

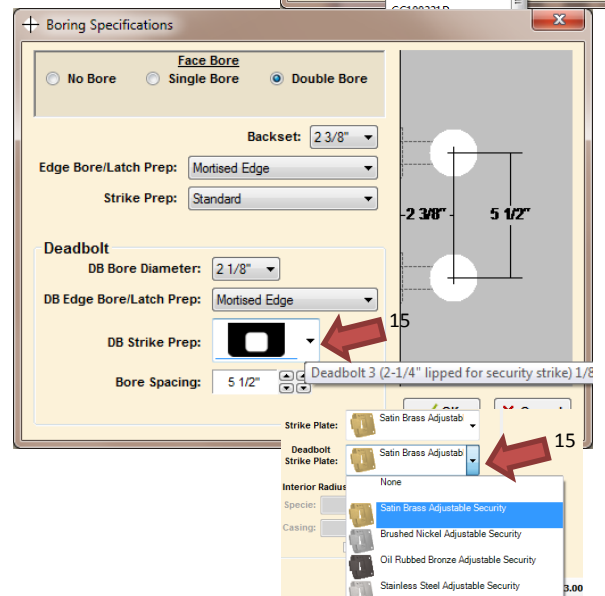
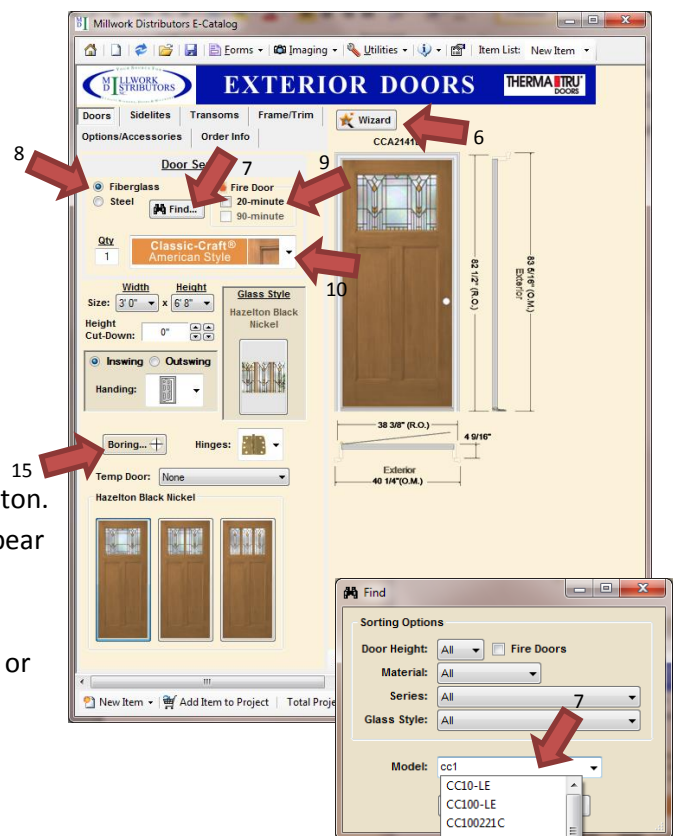
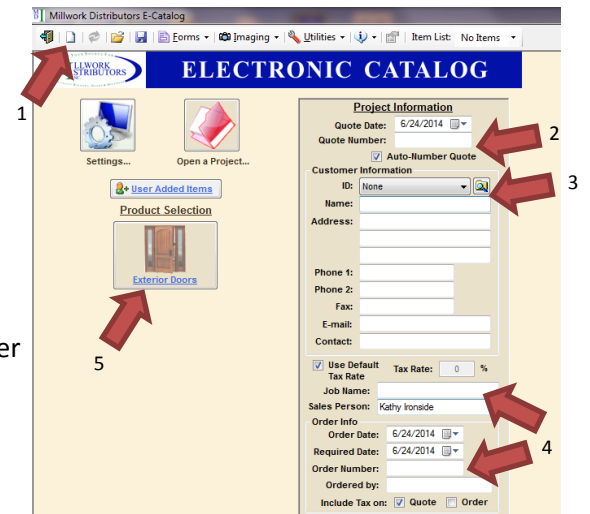
Entering a Quote/Order

When you open the program, you will be on the Home page.

1. To start a new quote, after you have already started or entered a different one and want to clear that and start new, click on the Start a New Project (the paper) icon in the top menu bar.
2. You can enter your own Quote Number, or check the Auto-Number Quote box.
3. Enter your Customer's information in the boxes shown (for a one-time sale), add a customer to your Customer Database, or select your stored customer from the drop-down.
4. Add a Job Name and/or Order Number

Entering a Therma-Tru Unit

5. To start the unit, click on Exterior Doors
6. To go through step-by-step, click on the Wizard button (this will go through and ask each question)
7. If you know the Model Number of the door, use the Find button. Here you can enter the Model Number, a list will start to appear when you start to type. Click on the correct one.
8. To select by collection and glass, first select either Fiberglass or Steel.
9. If you want a Fire Door, check 20-minute or 90-minute.
10. Select your Door Collection
11. Select your Glass Style
12. Width x Height – and height cutdown
13. Swing and Handing
14. Hinges
15. Boring – this is where you can select Deadbolt Bore



(for **Deadbolt 3** – be sure to select a Deadbolt Strike Plate on the Frame/Trim tab.

Sidelites - To add Sidelite(s), under the Sidelites tab, you can change the Glass if you want something different than the door. You can also use the Find button to search by Model Number.

To remove a sidelite, either uncheck the Left Side or Right Side, or click on the sidelite again and it will be removed.

Transoms – select either the Rectangle or Elliptical transom shown. You can also change the Glass Style.

To see Half Round or Arch Top transoms, check the Custom under Transom Frame Height.



Order Info tab – This is where you can add a Comment (tag name) to the unit. You can also select Installed Sale to add a labor/installation charge.

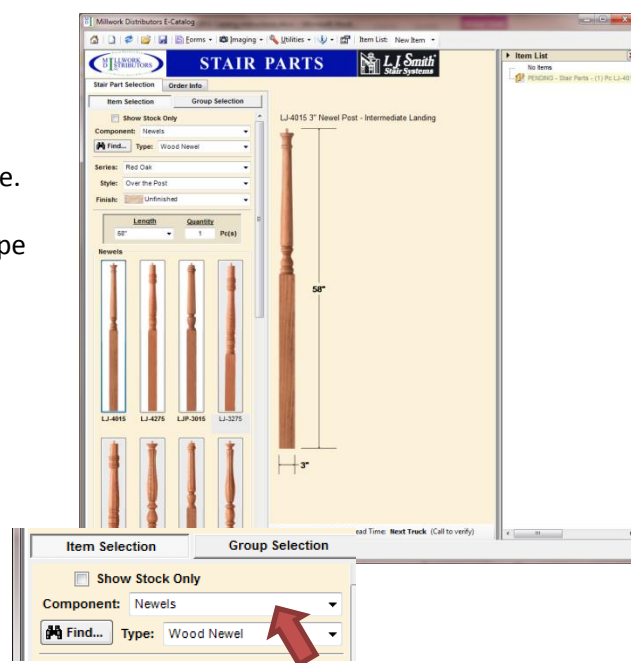
Entering Stair Parts

You can make selections either by Item, or by Group.

By Item, start by selecting which Component you want, then Type.

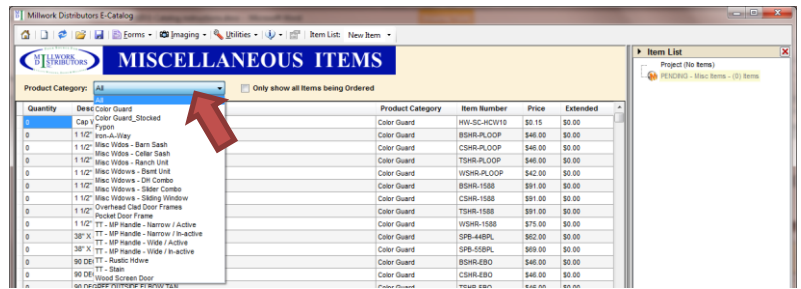
****** When using the Search feature, you must first select which type of Component it is, then click on the search icon.

By Group, you can see all the components in a table and enter the quantities.

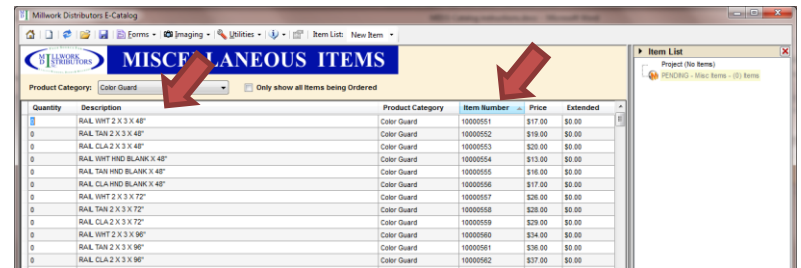


Entering Miscellaneous Items

The table will show all the products, to narrow Down, select from Product Category dropdown.



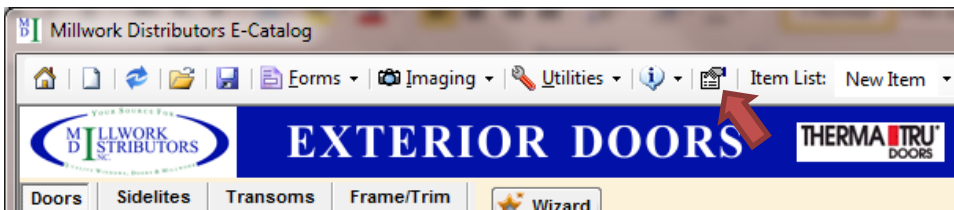
You can sort alphabetically by clicking on the name in the Header (ex. Click on Description or Item Number)



Enter the quantity by all the items, then click on Add Item to Project to add all items.

Manual Line Entry

To add a manual line entry for this unit (this could be to add something custom that is not in the program, or to deduct a door slab for a frame only, etc.) click on the icon just to the left of Item List (hand pointing to list).



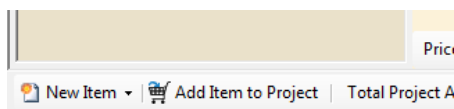
This box will come up

	Description	Qty	Net Price	Retail Price	Taxable	Include On Quote	Include On Order
*					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

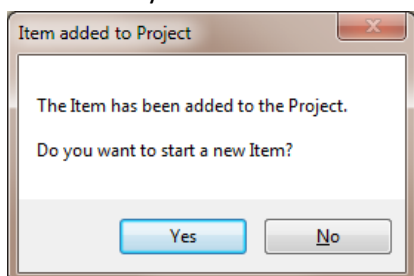
Enter your description, qty, Net Price (for Orders) or Retail Price (for your quote to customer). Be sure to check if it should be Include on Quote, or Include on Order. *** NOTE - multipliers will NOT be applied to these prices ***

Add Item to Project

Once you finish with a door unit, click on “Add Item to Project” on the bottom menu bar.



It will ask if you want to start a new item. This is if you want to add another unit to this same project.



If you start a new item, it will hold onto all your previous selections until you change the Collection (CC, FC, Traditions, etc.) or change the Glass Style. Be sure to check all your options in case something did change.

To Edit an Item

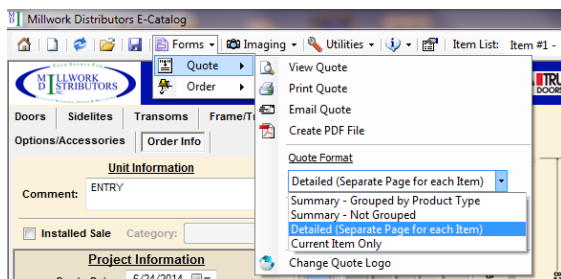
With the quote open, you can double-click on the Item # under Item List over on the right-hand side, or go to the top menu bar, last one on the right is Item List, with a drop-down. You can select your Item from there and make any changes necessary.

To View a Quote/Order

Go to the top menu bar – Forms – Quote – View Quote / or Forms – Order – View Order

This is where you can also print, email, or create a PDF of the Quote or Order.

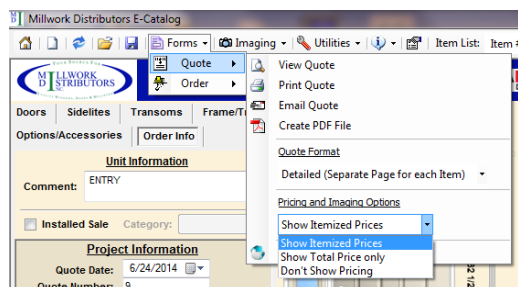
You can change the print format for each here as well.



The Summary formats will put all the descriptions of a unit into one paragraph. This will make it a little more difficult to read, but will save space for printing.

The Detailed format breaks the item up by the options.

You also have the option to change how the prices are shown or not shown.

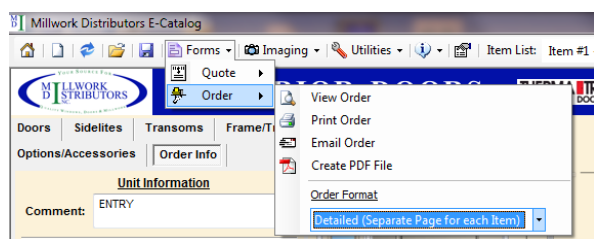


Itemized Prices will show the price of each option and the total price per unit.

Total price only will just show the total price per unit.

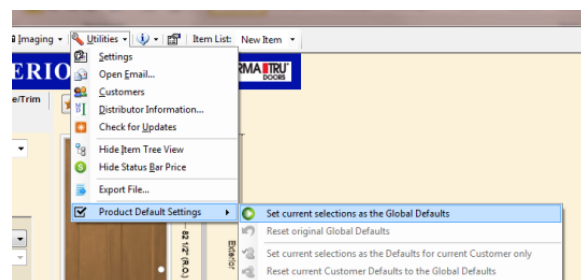
Or you can have it not show any prices.

For Orders you send to MDI – we prefer to receive these as Detailed format. This is easier for our order entry department to read and enter the order into our system.



Setting Defaults

If you have options you would like to be set at defaults (example, you always use Brushed Nickel Ball Bearing Hinges, Clad Crowline 6 9/16 frame, and a Sill Cover), you can enter a unit with these options, then go to Utilities – Product Default Settings – Set current selections as the Global Defaults. You can also set defaults per customer.



Save Quote

When you have finished entering all the items for your project, click on the Save icon in the top menu bar.

