2013

Kitchen Quotemaster

Kitchen Quotemaster is a quoting application with an emphasis on quote building, recording and historical lookup. Kitchen Quotemaster is fast and compact, providing access to stored information with an exceptionally user-friendly interface.

Nexial Software

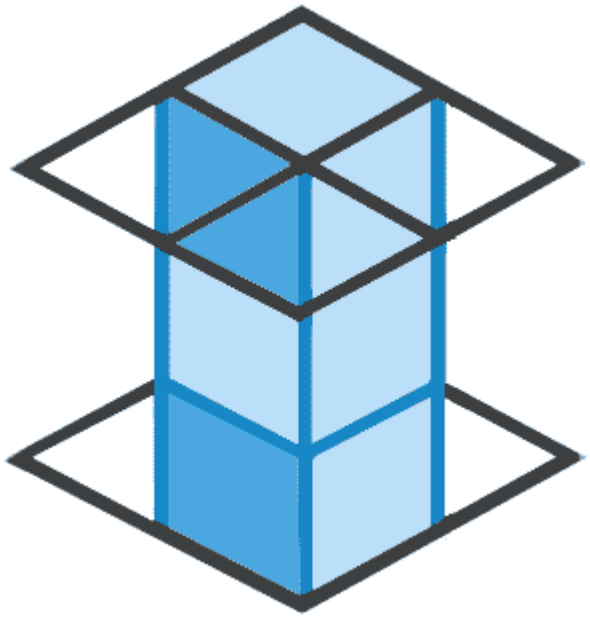
Contents

Introduction 4
Key features 5
Concept 6
Process 7
Minimum Requirements 8
Installing Kitchen Quotemaster 8
Kitchen Quotemaster Interface - Main Screen 10
Interface - Details 11
- Reports 11
  - Preview a report 11
  - Print a report 11
  - Printer Setup 11
  - Instant Reports 11
- Links 11
- Tools 12
- Help 12
- Administration 13
  - Maintain Price Files 13
  - Set Registration Details 13
  - Restore Database from Backup 13
- Toolbar 13
  - Backup 14
  - Print and Printer Setup 14
  - Margin Calculator 14
  - Page Expander 15
  - Action and Hint bars 15
  - Sidebar 15
  - Display Options 16
  - Centre screen 17
  - The Navigator 18
- Changing recorded quotes 18
  - Full Quote Change 19
- The quote tools - in detail 19
  - Choose from template 19
  - Product Find 21
  - Quickfind works in this manner 21

Analysis 22
- Quote Analysis 22

Setup screen 23
Budgets 23
Budget Type 23
Forecast Type 23
Creating new budget entries 23
Designing budget graphs and figures 24
Links 25
Tools 26
Branch 27
BranchID 27
Branch Name 27
Branch Address 27
Branch Google address for maps-to 27
Clients 28
Account Managers 28
Restricted 29
Code 29
Description 29
Reference Value 29
Maintaining Vendor Price Files 30
About import data. 30
Maintain Prices 32
Here are some points to note: 32
Import Cabinet Prices 33
Import Raw Material Prices 35
Door Cost Management 36
About form design with Report Designer 38

Introduction



Kitchen Quotemaster began as a small tool for producing quotes about 20 or so years ago. Pre-windows, it was originally written using Microsoft Quick Basic but over the years it evolved into the fully fledged quoting tool that it now become. It has been used exclusively by one only kitchen manufacturer during this time and now that the manufacturer has retired, it can now be made available commercially.

Kitchen Quotemaster uses Microsoft SQL as its back engine. This has been an excellent choice when it comes to stability and speed. SQL barely blinks an eyelid when it comes to fast delivery of information to the user. SQL Express Edition (free) will do nicely, but full SQL versions 2003 – 2012 may be better for the larger company.

Microsoft Office is a requirement that most businesses will already own, of which Excel and Outlook are used heavily. Outlook Express and other mail clients can substitute for the full version of Outlook.

From the outset, the user interface has been a very important feature of the development design, as the emphasis is on compactness and speed. There are many shortcuts and methods which enhance the user experience, improving functionality and reducing fatigue. The design focuses in presenting a simple interface but with drill down into the less commonly used features. The data has dominance over the screen titles, buttons and components, a feature that is not commonly found in competitive systems.

Speed of data retrieval, and extremely efficient ways of finding data, are a big feature in the design of Kitchen Quotemaster. This makes such needs as finding historical information for making forward decisions, just a few keystrokes.

Key features

General:

- Microsoft SQL based database (Full or Express Editions 2003 - 2012).
- Links and Tools toolbar menu for quick access to user definable web or application tools.
- Report Designer with full banding and printing.
- Manual backup and restore of database with a button click.
- Full right click 'What's This' help on all labels and important objects.
- Create and maintain vendor price downloads for import into the database for lookup purposes
- Print with Preview with user definable layouts and reports.
- Inbuilt print-to-PDF.
- Simple installation via an installer application.

Quote building:

- Insert or append from template (pre-saved quote)
- Insert from Database Price file (vendors downloaded import)
- Manual entry with line calculation (backwards too)
- Insert, Delete and Move rows
- Paste special with any range of data (with auto row addition)
- Full clipboard support for rows
- Headings and Subtotals with text highlighting
- Paragraph lines (no pricing – for supplementary information)
- Bulk removal of blank lines
- Bulk removal of lines with quantity of zero
- Quick save to file for temporary backup of working quote
- Latest price lookup of quote items
- Smart look ahead of client lookup with partial content typing
- Useful toolbars with quick links to improve speed
- Popup margin calculator
- Include/Exclude lines with a tick
- Private notes by quote

Quote History:

- Master/Detail visibility of quote list
- By Account manager with independent branch segregation (multi user version only)
- Full searching and list shortening by most columns
- Quickfind lookup for any nominated column with partial search and list shortening
- Hide or show any column or move to a different position
- Copy all visible items to clipboard for pasting into spreadsheet
- View quote details as a form for extended information viewing
- Email directly to client with attached PDF in outlook

Quote Analysis:

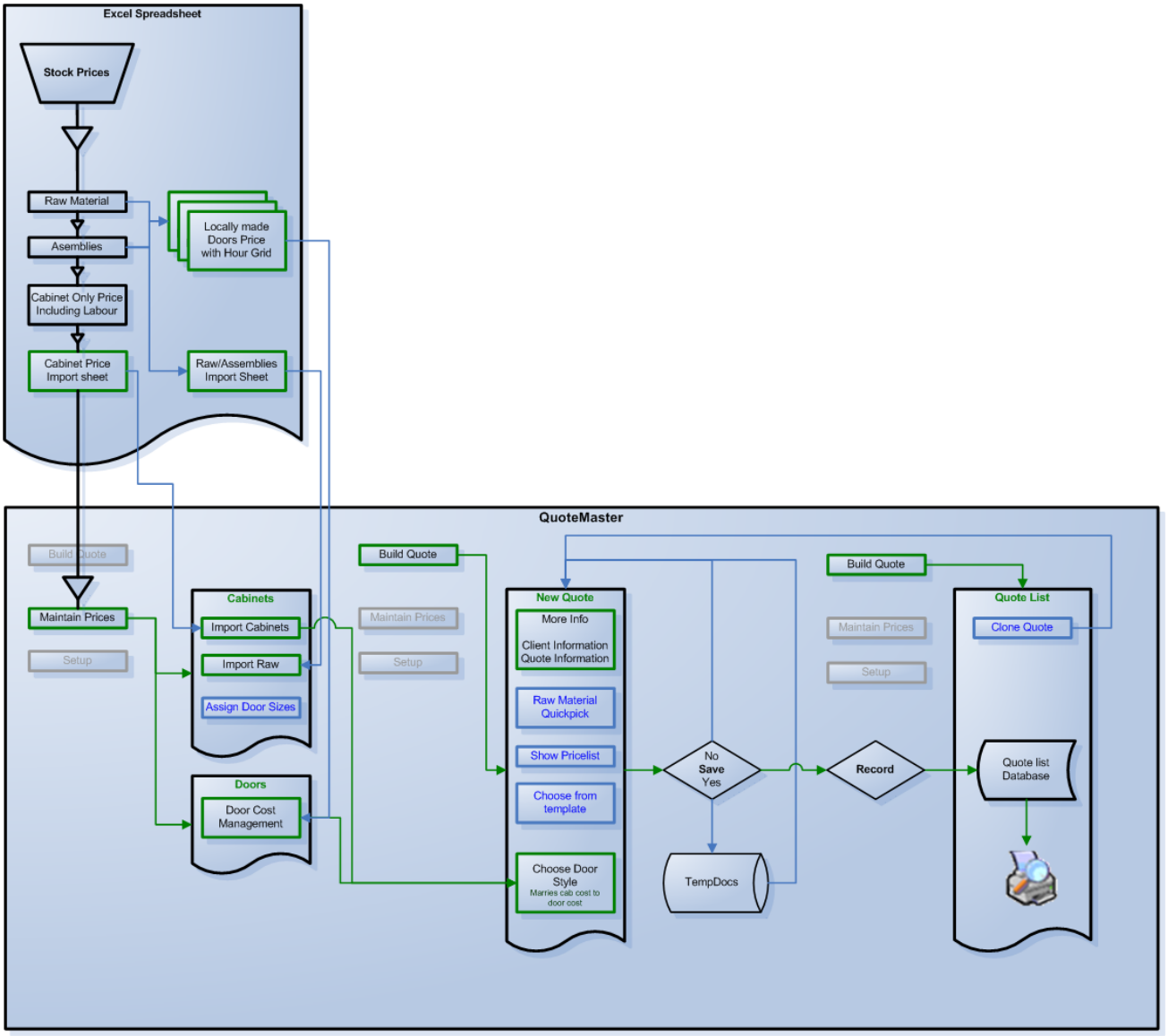
- Graphical representation of quote statistics with copy graph to clipboard

Concept

The primary function of Kitchen Quotemaster is to manage the preparation of quotes accurately and with flexibility. Kitchen design drawing programs may be used to design the layout and produce a list of cabinets to be included in the quotation; however there is no direct integration with them.

Cabinet pricing is done with an Excel spreadsheet and imported into the database whenever there are raw material price changes. Cabinets are priced initially without face or door material and married with doors at the time of choosing a cabinet style. This offers the flexibility to mix door styles in the same quote and also the ability to have unlimited door styles to mix and match.

Door pricing is also done with a spreadsheet and/or using a vendor supplied price list. Hardware pricing remains with the cabinet carcass leaving only the face/door pricing as the variable.



Process

1. A quote is prepared and saved into the database ready for presenting to the client.
2. If you are acting as a quote desk then account managers can be notified by email that the quote is ready for inspection and approval.
3. On approval the account manager can send the quote by email or personally deliver to the client.
4. If the quote is declined then it can be archived.
5. If the client accepts the quote then it can be passed on to the factory and accounts for scheduling.
6. The accounts personnel and Accounts Managers combined can track the progress using the various tick boxes of status, available on the quotes grid.
7. Reports and Graphs provide the analysis where required.

There are many different ways of using Quotemaster and this is just one scenario.

Minimum Requirements

Stand alone computer:
Dual core processor
1 Gb Memory (2Gb+ preferred for Windows 7, 8)
160Gb Hard Drive
Windows XP Pro SP3 or Windows 7, 8, Professional if on a domain.
Microsoft Office Standard (for access to Excel)
Internet Connection
SQL Express (preferably 2008 R2 or higher)

Server (if in a shared environment)**:**
Any server capable of hosting SQL Server 2003 and upwards, virtualized or stand alone.
(Note: It is possible to use replication between localised branch servers but it is not recommended.)
Terminal Services remote access (RDP) for remote clients if needed.
SQL Server Licensing and CALs as required if not using the Express Edition.
Microsoft Office and/or Microsoft Exchange licenses as required.

Workstation:
Thin client or stand alone computer/laptop.

Installing Kitchen Quotemaster

An installer is available for download from nexialsoftware.co.nz and automates the installation with only minimal operator intervention.

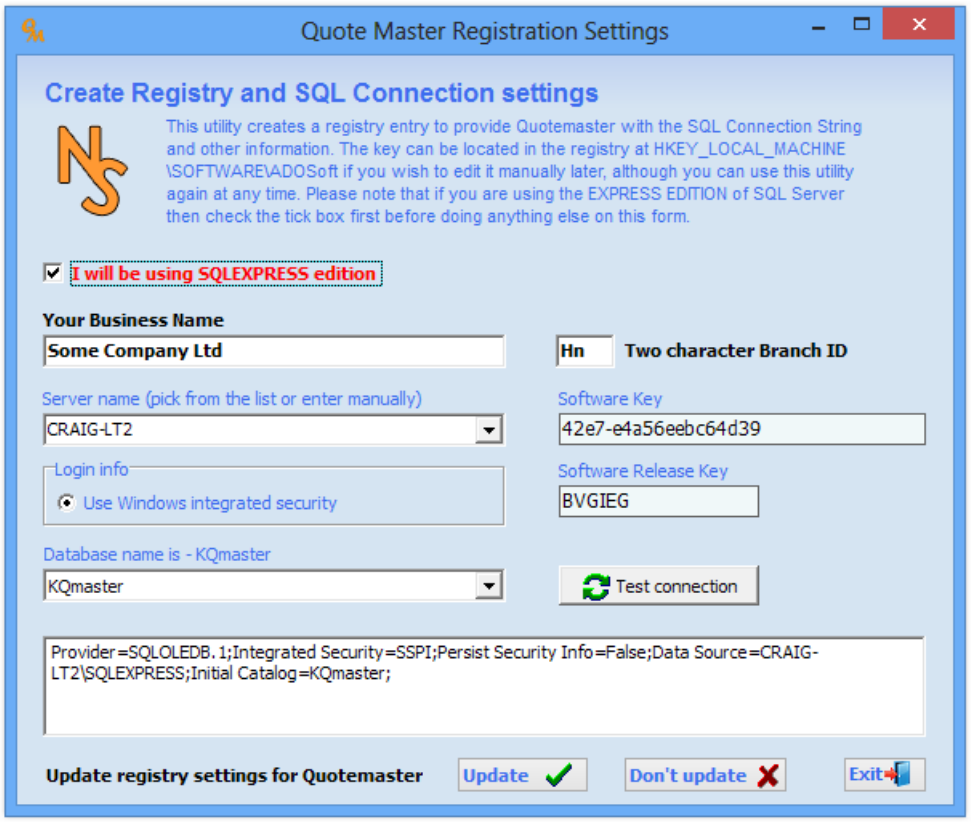
The general installation process is as follows for standalone computers …

1. Download the installer application to a temporary location, unzip and execute from there.
2. The installer will create an application folder and set up the necessary registry entries.
3. If Microsoft SQL is not found in the registry then it will be downloaded and installed.
4. The KQMaster database is created in SQL ready to go.
5. Finally, you will need to contact Nexial Software to get product release keys to allow a trial period, or if you have purchased Kitchen Quotemaster, a twelve month period.

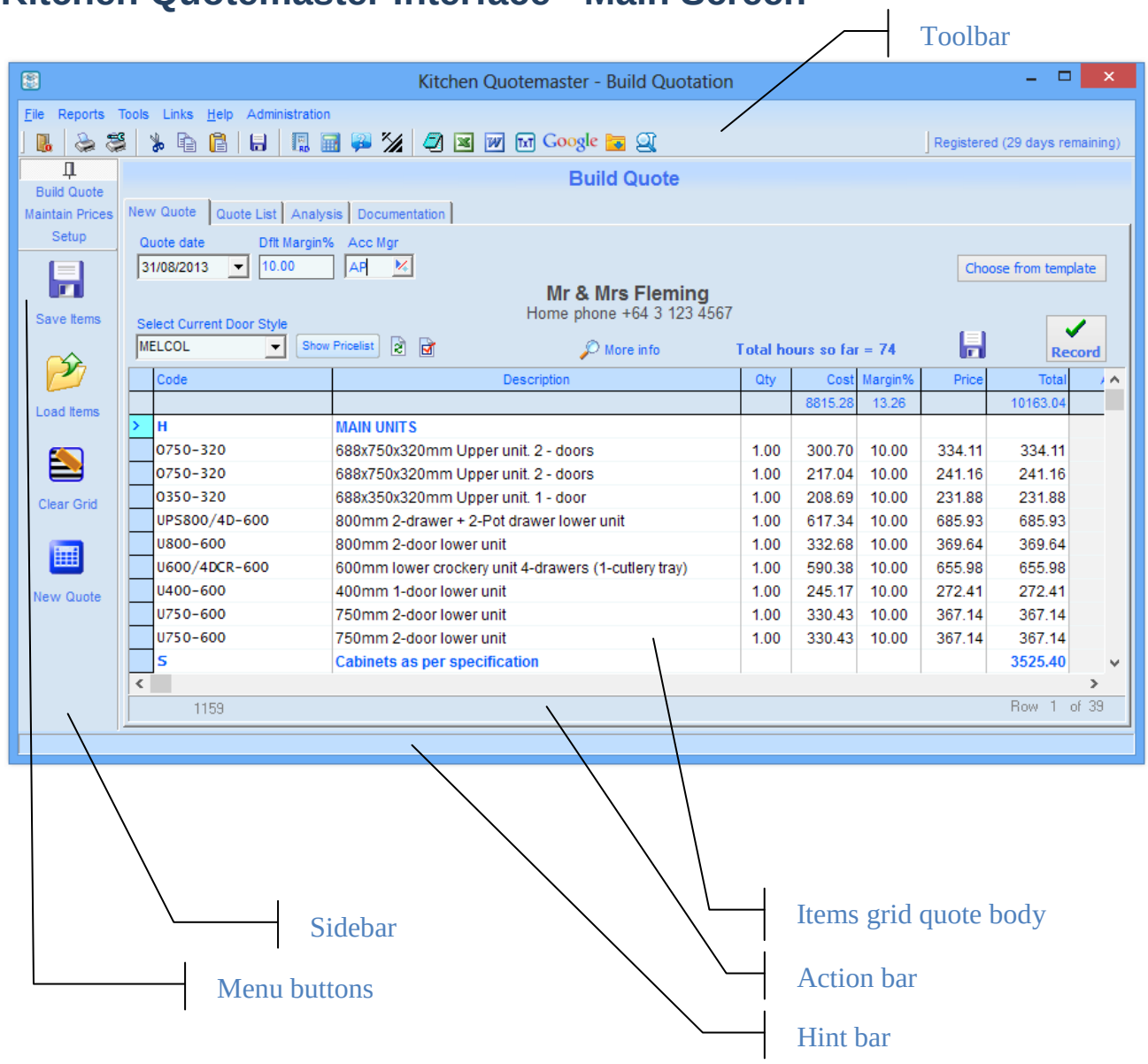
Note: SQL can take up to 45mins to download and install - the download for SQL 2012 Express with Tools is nearly 1Gb in size. Times may vary depending on your environment.

To get a free trial period just go to http://www.nexialsoftware.co.nz/contact.shtml and provide your business name and contact details. The keys will be sent to you within 24hrs.

If you start up Kitchen Quotemaster and it is unregistered then the screen below will appear so that you can enter the keys, otherwise, this screen can be accessed from inside Kitchen Quotemaster in the Administration menu.



Kitchen Quotemaster Interface - Main Screen



All the tools you need are immediately at your fingertips.

At the top and left of the window are the tools, and in the middle is a tabbed set of screens with various views of the system. The extensive use of RightClick exposes popup menus for the various context actions that are available. - If you are ever in doubt try RightClick!

The Side bar provides a more visible set of action buttons and can be unpinned to hide, providing more "real estate" for the grids.

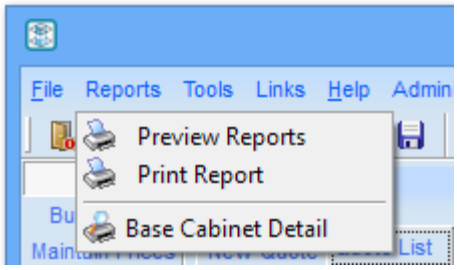
The Mode button locks or unlocks for editing some of the controls, so that a conscious decision has to be made to make changes. Tick boxes are a good example of this, where it is possible to inadvertently click a change. If Mode is locked then changes cannot be made. When Mode is unlocked tick boxes will change colour to indicate that they can be changed, and also to provide highlight for better viewing.

With the exception of the New Quote grid, most grid columns can be moved or re-sized, or even hidden, using Display Options. A horizontal splitter between grids allow for vertical resizing.

All controls show hints when hovering with the mouse both as a popup and on the Hint Bar.

Interface - Details

Reports



Preview a report

With this option, reports must be picked from a folder list. They can then be previewed before printing.

Print a report

With this option, reports must be picked from a folder list. They are then sent directly to the printer without a preview.

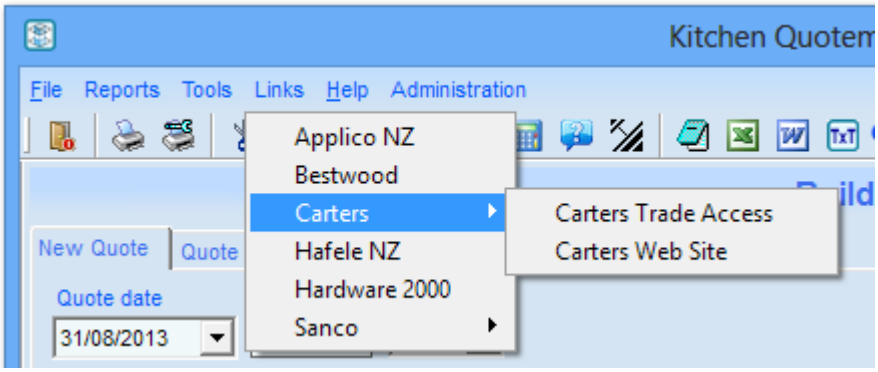
Printer Setup

Use this option to change the printer settings or choice of printer for the session.

Instant Reports

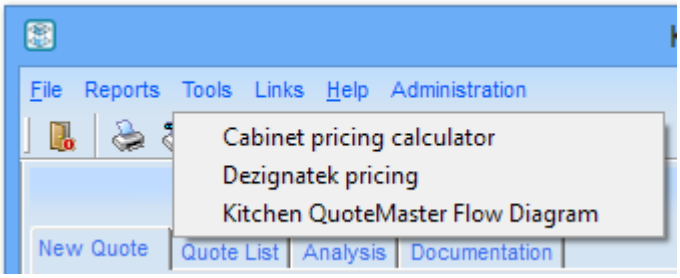
Reports place at the root of the reports folder are automatically shown as the last items on the menu. When selected they are instantly previewed before giving the option to print.
(*Base Cabinet Details is shown in the picture)*

Links



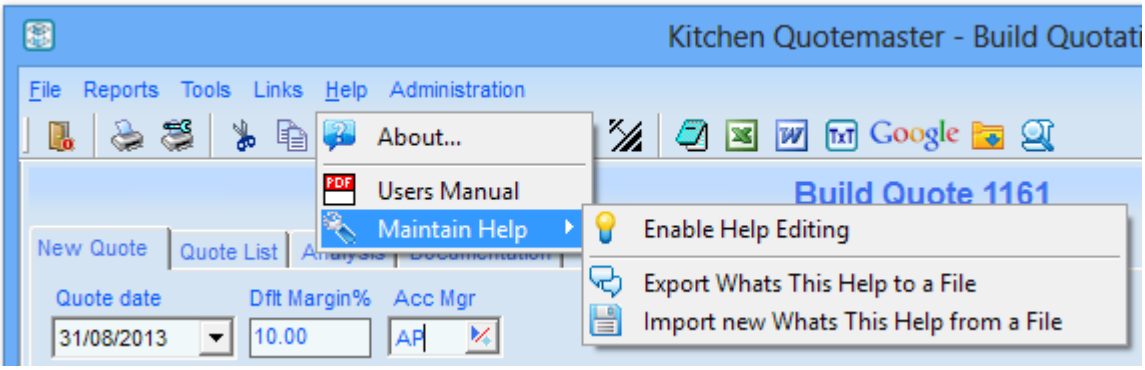
The Links Main Menu Dropdown is used for web pages that offer useful information. The items on this menu can be configured under Setup (*see Setup section later in this manual*).

Tools



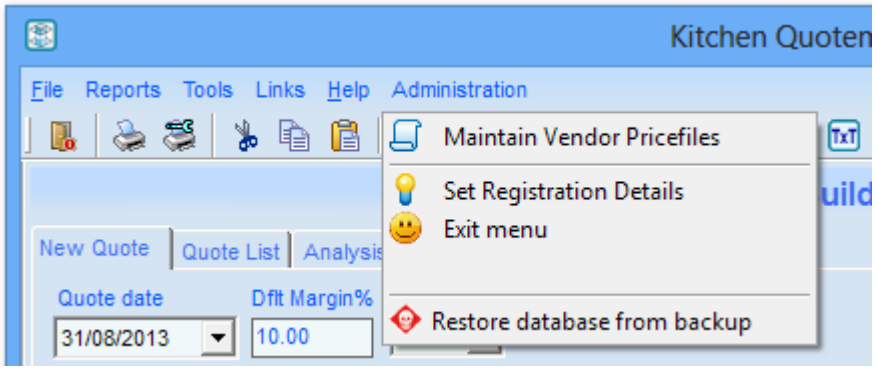
The Tools Main Menu Dropdown is used for launching applications or web pages that offer useful facilities. The difference between the Links and Tools menu is that the Links menu can only offer web sites where Tools can be used for any executable application. The items on this menu can be configured under Setup (*see Setup section later in this manual*).

Help



One of the great features of Kitchen Quotemaster is the context sensitive "RightClick" – "What's this?" help - this can be maintained by using these options.
Look here for any assistive information about Kitchen Quotemaster.

Administration



Currently there are only three options on this menu…

Maintain Price Files

This option enables you to create and import price lookup tables with information from vendors. You can also use a spreadsheet to create custom lists that can be imported. (*For full instructions see the Maintain Price Files later in this manual.)*

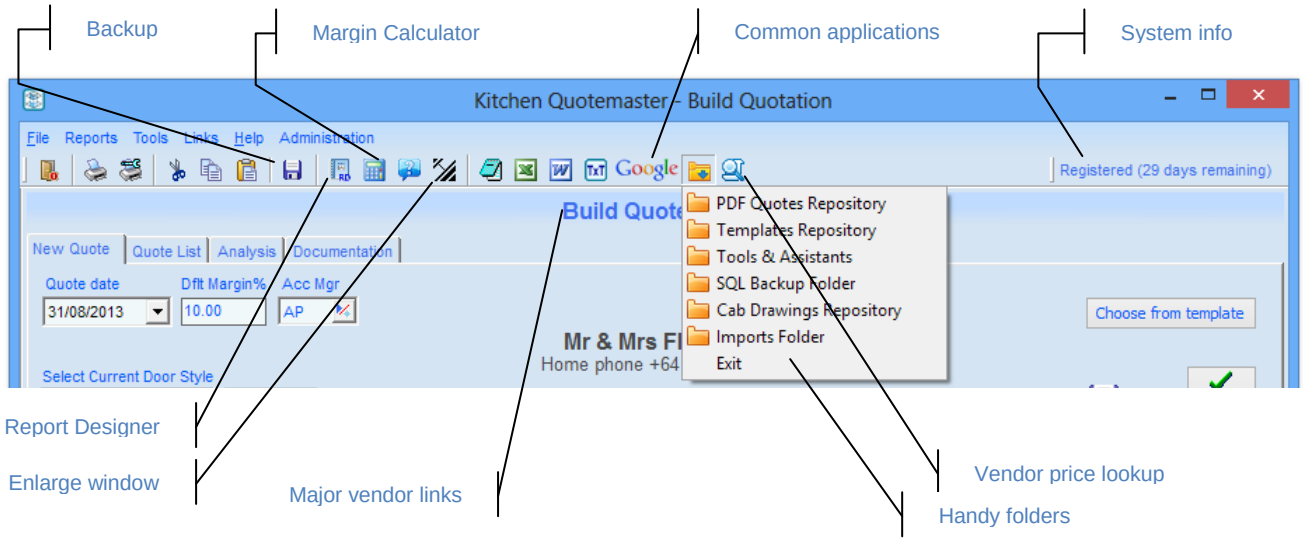
Set Registration Details

Use this to enter your company information and product release key supplied to you by Nexial Software.

Restore Database from Backup

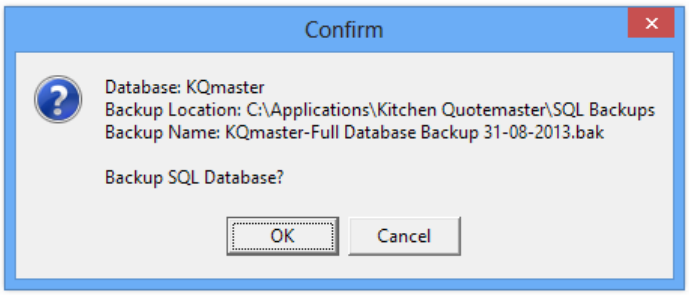
In the event of some catastrophic event, you can restore the database from a previously saved backup. It is extremely unlikely that you will need to do this. After completing the restore process you will need to exit Kitchen Quotemaster and re-launch it before you can continue to use it.

Toolbar



Backup

This allows operators to backup the database to a file without exiting the application or closing other users. This can be done as frequently as you wish.



Here are a few points…

- The backup name is automatically generated.
- Backups are created in the fixed "SQL Backups" folder under the application folder.
- If a backup exists it will be appended (*as a separate session*) to the backup file.
- If the backup file grows too large then the original file will be renamed and a new one created.
- The backup file is manageable using SQL Server Management Studio.
- When the backup has been completed you will be given the option to email it to an offsite recipient. This creates a zipped file of the backup and attaches it to your email client automatically.

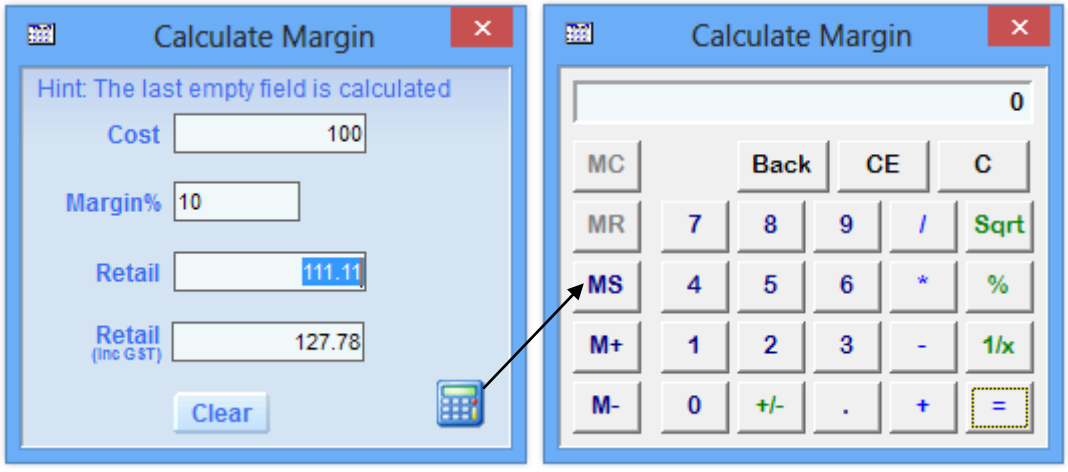
It is recommended that you Zip the older backup files to conserve disk space. This can be done by opening the SQL Backups folder from the System Folders toolbar dropdown *(see toolbar picture above)*, right clicking on the backup file, then click **Send To, Compressed (Zipped) folder**. After the zip file is created you can delete the larger .bak file.

Print and Printer Setup

The print button allows you to choose a predefined report format and is exactly the same as choosing Print a Report from the Reports Main Menu.

Printer Setup allows you to change the printer settings or choice of printer for the session and is exactly the same as choosing Printer Setup from the Reports main menu.

Margin Calculator

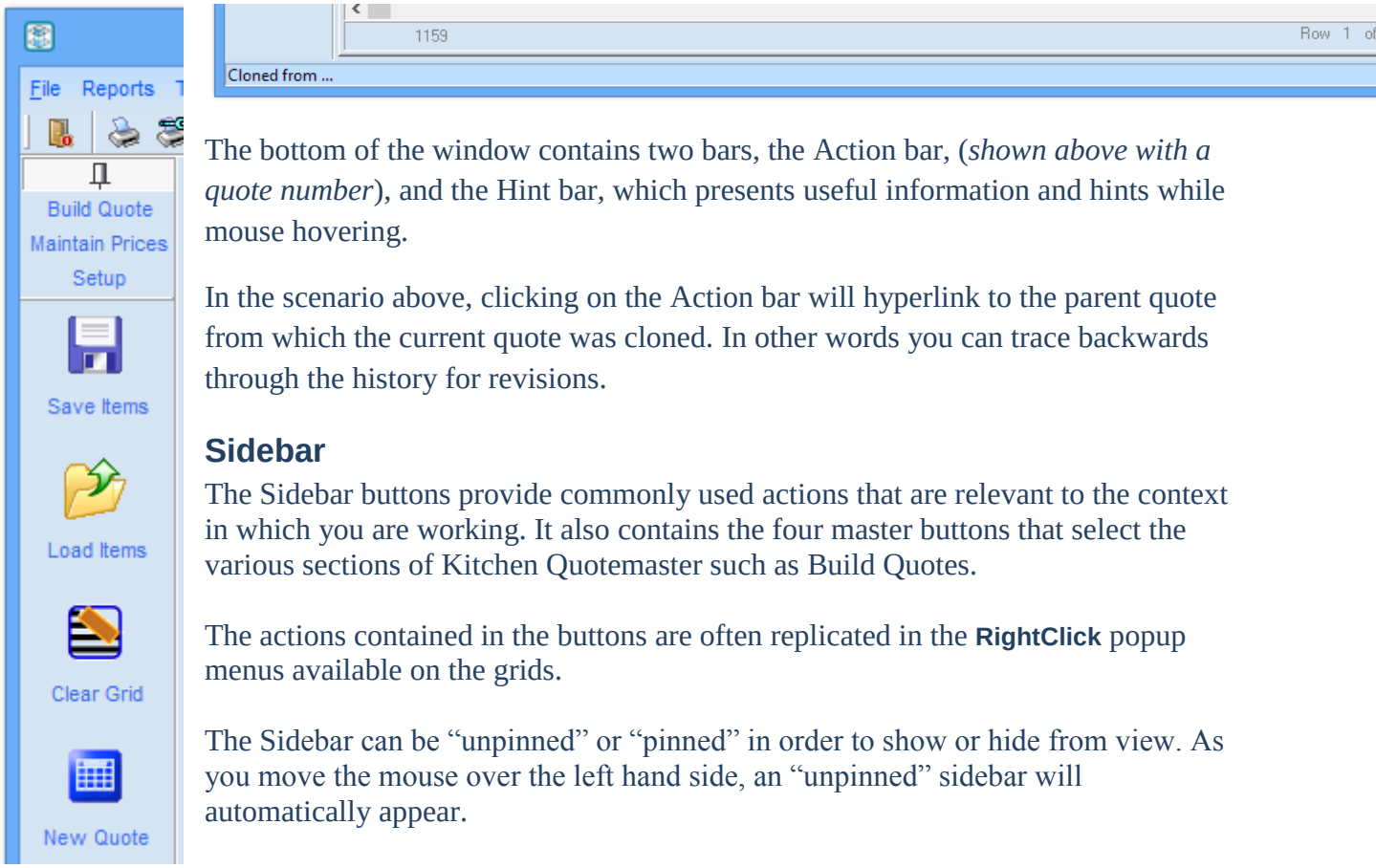


This is a particularly useful tool as it can calculate the Cost price, or the Margin or the Retail Price, from the figures you input, in any order. An ordinary calculator is also available for convenience

Page Expander

While it's good to have a compact window that does not fill the whole screen, it is sometimes convenient to have a larger window, particularly for scrolling the grid list vertically. The Expand Window button increases the height of the window to the maximum height, but keeps the width the same, and returns the window size to normal if clicked again.

Action and Hint bars



The bottom of the window contains two bars, the Action bar, (*shown above with a quote number*), and the Hint bar, which presents useful information and hints while mouse hovering.

In the scenario above, clicking on the Action bar will hyperlink to the parent quote from which the current quote was cloned. In other words you can trace backwards through the history for revisions.

Sidebar

The Sidebar buttons provide commonly used actions that are relevant to the context in which you are working. It also contains the four master buttons that select the various sections of Kitchen Quotemaster such as Build Quotes.

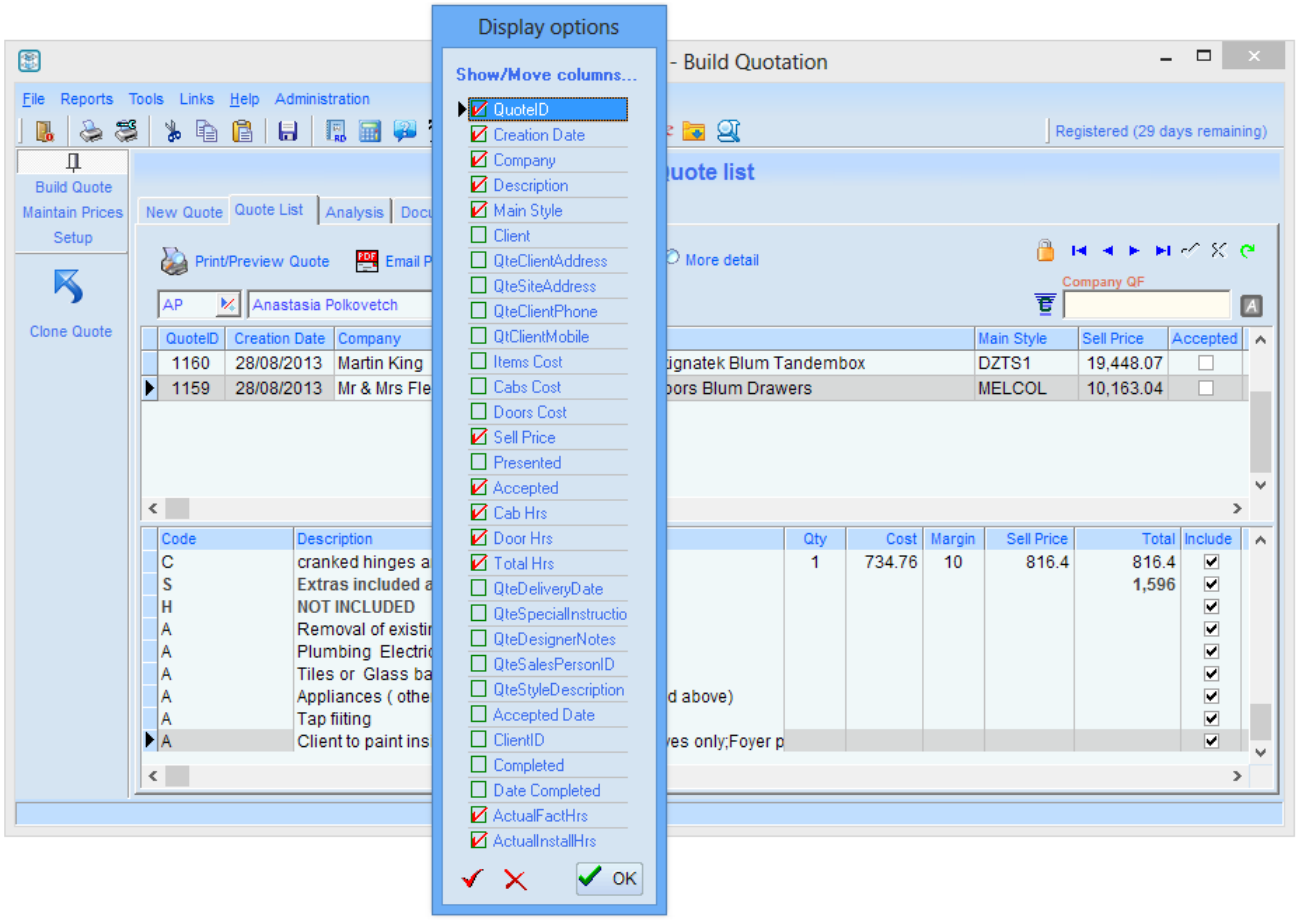
The actions contained in the buttons are often replicated in the **RightClick** popup menus available on the grids.

The Sidebar can be "unpinned" or "pinned" in order to show or hide from view. As you move the mouse over the left hand side, an "unpinned" sidebar will automatically appear.

Hint: If you hover over a button then a hint will appear to let you know its purpose.

Display Options

The arrangement and visibility of columns can be changed using the Display Options button on the sidebar, or with a RightClick menu on a grid. By dragging a row to a new position, or ticking or un-ticking a checkbox, you can change the way the grid looks for the current session.



You can also drag columns left and right in the grid itself using the column-name cell, however this will also activate a column sort – hence the need for the popup shown above.

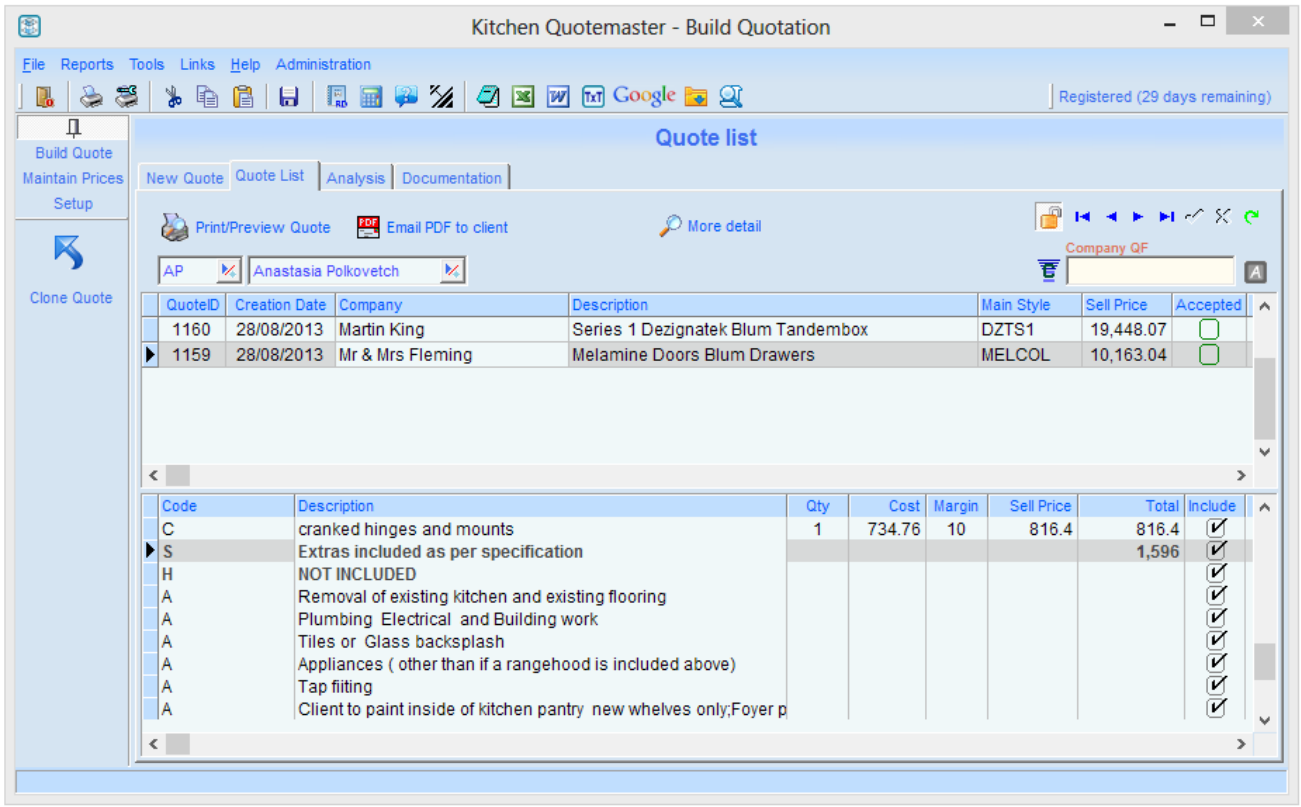
The red Tick button and the red Cross button at the foot of the popup either clears or ticks ALL the checkboxes.

The OK button closes the popup.

Hint:
This facility is particularly useful if you are exporting the contents of a grid with copy Tagged Rows to Clipboard to paste into a spreadsheet.

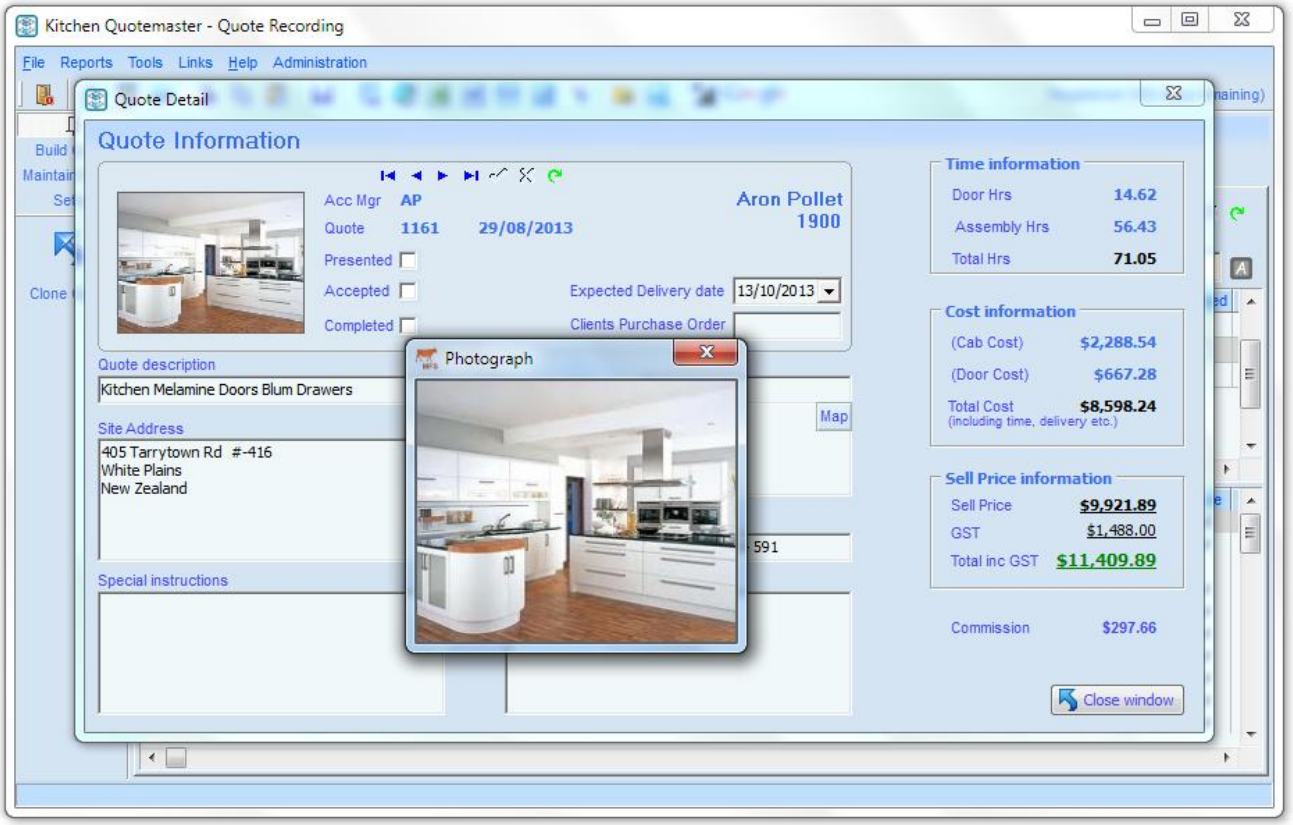
By arranging the columns of the grid you can be selective in what is copied

Centre screen



Each master menu button exposes pages which have a tab control which in turn exposes different options in which to work. In the picture above, the **Build Quote** button on the sidebar has been clicked and the TAB **Quote List** has been selected exposing the buttons and grids relevant to that operation.

It's simple and fast!



The Navigator

On most tabs there is a control called “The Navigator” which allows you to navigate backwards and forwards, insert and delete, but most importantly Cancel or Save.

Where an operation is not applicable then the Navigator will not show the button.

You can still use the mouse, mouse wheel and keyboard to navigate including standard hotkeys such as Ctrl + End or Ctrl + Home.

When making changes the Navigator will show a red tick and a red cross to indicate that a change has been started. It is good practice to use these two buttons to either accept or cancel changes before moving on.

A few points to note…

- If there is no navigator then changes are posted immediately.
- If you neglect to “click the tick” then changes will be saved by default.
- In grid lists, if you move to another row then the changes will be posted immediately.
- The Padlock enables or disables grid changes.

Changing recorded quotes

Now, what if you need to make changes to the quote items after it has been recorded?

Well that’s no problem; there are several ways to tweak the quote after it has been recorded and here is a summary…

Full Quote Change

Using RightClick you can Edit Quote and open a full editing screen similar to New Quote. When you save from here you are effectively deleting the original items and replacing them with new ones from this screen.

Direct changes

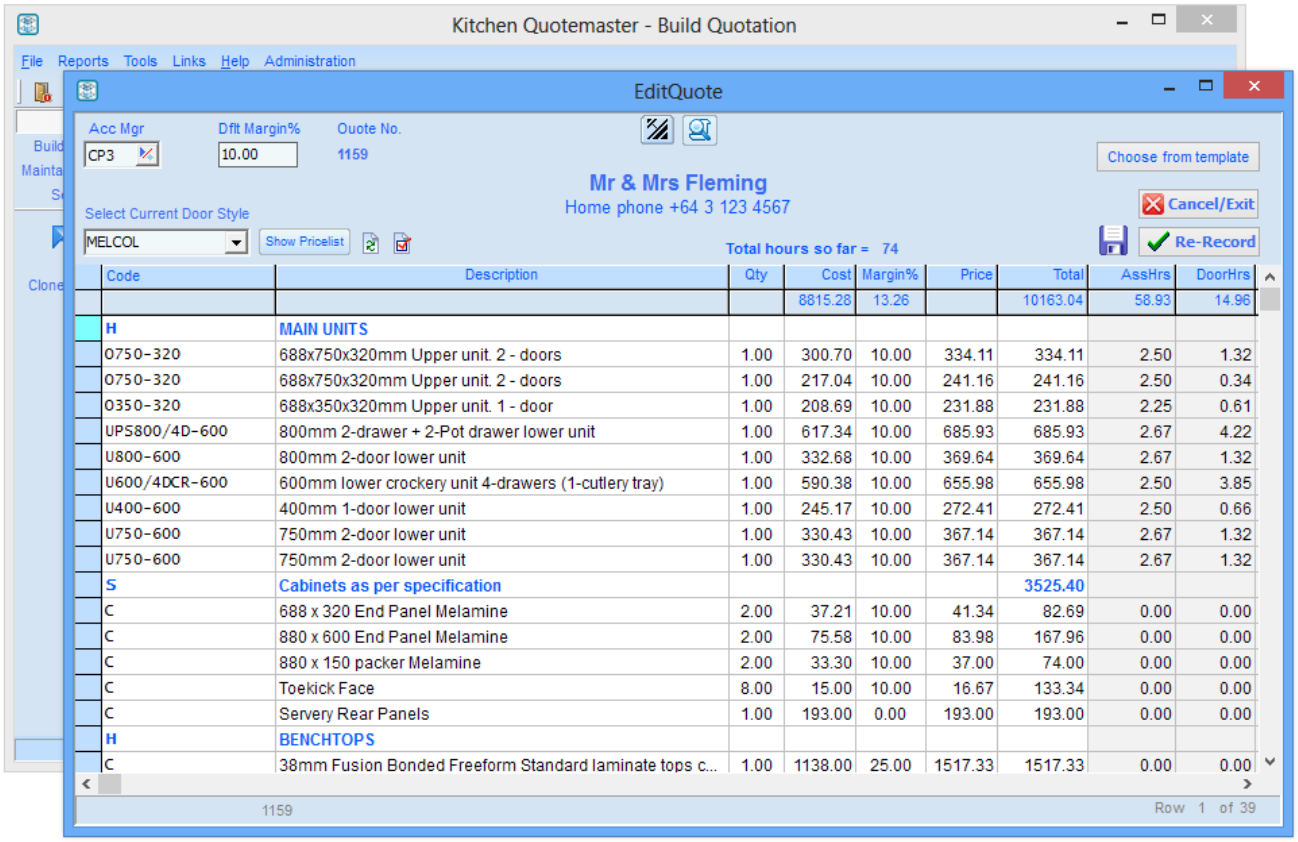
You can make changes directly in the Items grid but you cannot add or move rows. You can delete a row; however it’s just as simple to exclude the line using the Included tick box.

Clone Quote

You may prefer to keep the original and Clone the quote to a new number. This keeps the paper trail intact and in effect creates a revision of the original quote. Cloned quotes remember where they were sourced from therefore you can trace back through the history. Use the **Clone Items** button in the sidebar to achieve cloning.

In general, make changes directly in the Items grid only if you have not presented the quote to the client, otherwise it’s better to clone to a new number.

Full Quote Change

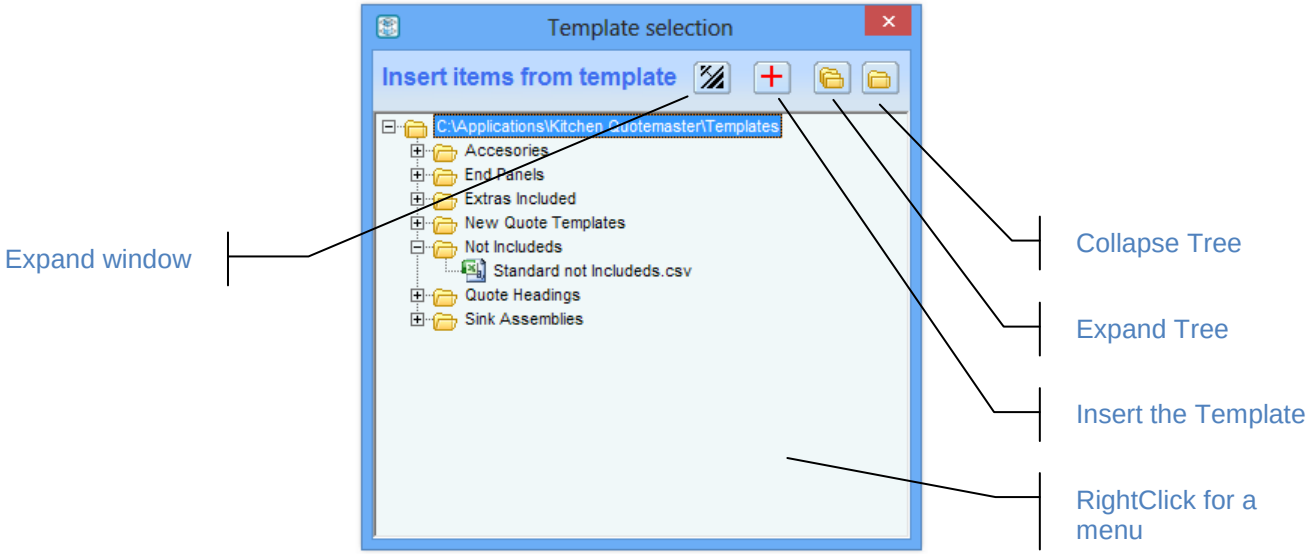


The quote tools - in detail

Let's investigate the tools commonly used to build a quote.

Choose from template

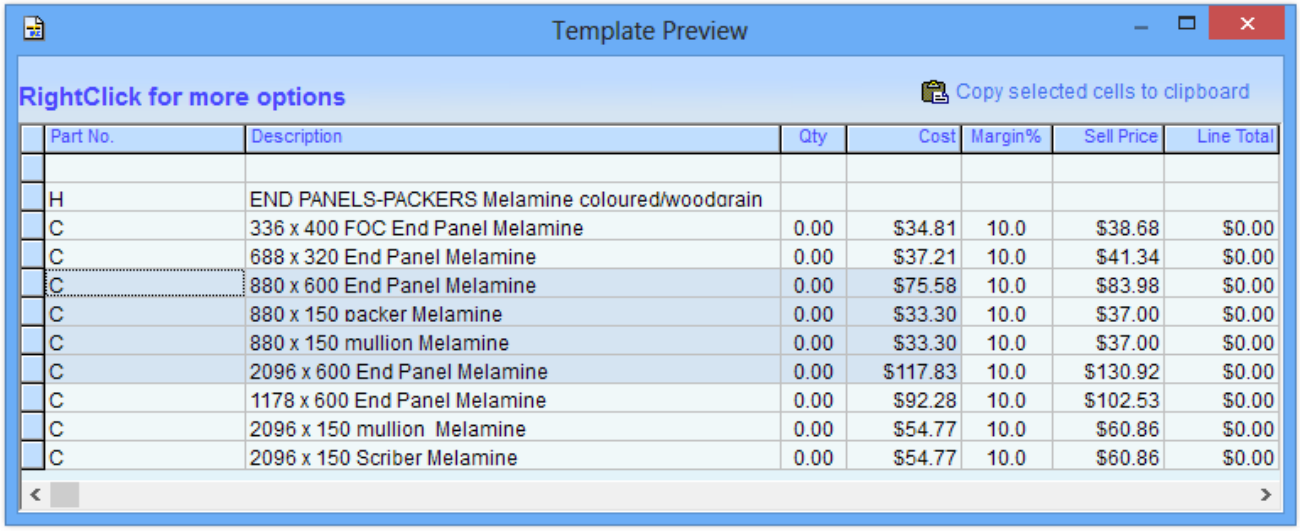
Template is simply a saved quote or partial quote created with the intention of reusing it many times.



Because a template has not been put through the checks that are done before recording to the database, it can contain any information, comments or instructions that can be removed at the last minute.

You can bring in a long list of items into the quote and then remove items with a quantity of zero to quickly clean out the unwanted material.

If you RightClick on the template in the tree then you can preview its contents and even select a row or range of cells and copy them to the clipboard for pasting into the new quote grid.

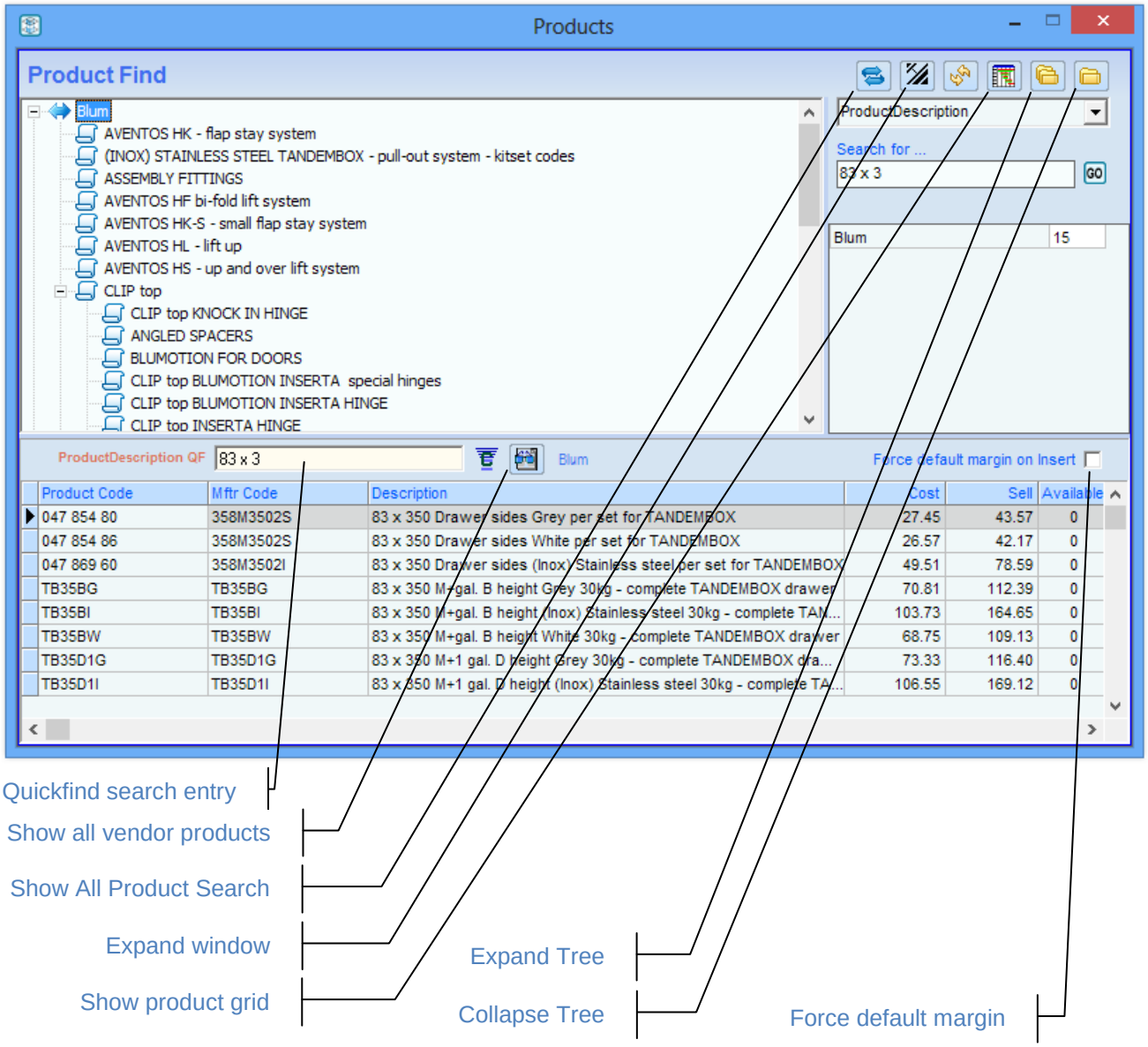


	Part No.	Description	Qty	Cost	Margin%	Sell Price	Line Total
	H	END PANELS-PACKERS Melamine coloured/woodgrain					
	C	336 x 400 FOC End Panel Melamine	0.00	$34.81	10.0	$38.68	$0.00
	C	688 x 320 End Panel Melamine	0.00	$37.21	10.0	$41.34	$0.00
	C	880 x 600 End Panel Melamine	0.00	$75.58	10.0	$83.98	$0.00
	C	880 x 150 packer Melamine	0.00	$33.30	10.0	$37.00	$0.00
	C	880 x 150 mullion Melamine	0.00	$33.30	10.0	$37.00	$0.00
	C	2096 x 600 End Panel Melamine	0.00	$117.83	10.0	$130.92	$0.00
	C	1178 x 600 End Panel Melamine	0.00	$92.28	10.0	$102.53	$0.00
	C	2096 x 150 mullion Melamine	0.00	$54.77	10.0	$60.86	$0.00
	C	2096 x 150 Scriber Melamine	0.00	$54.77	10.0	$60.86	$0.00

Templates are created by using **Save as Template** from a RightClick menu on the new quote grid.

Product Find

Product Find is your window into the pricelists downloaded from your suppliers. Structured into categories, this is an extremely efficient tool and can find products very quickly using a powerful search facility called **Quickfind**.



Quickfind works in this manner….

When you click on a grid you are clicking in a column. E.g. The description column. This then nominates the Description column as the field for Quickfind searching. Any column that makes sense can be nominated including numbers, the only type that cannot be searched is tick boxes. As you type in the Quickfind, only rows with fields that include the text you type will be shown in the grid. The pink title label to the left of the Quickfind indicates which column is being searched.

Note: If you click on the title of the column (the column name) this will toggle a column sort, ascending or descending order, so be careful not to click on the title of a column if you do not wish this to happen. Click instead on one of the lower rows.

You can also search for combinations of words in a cell by using the vertical Bar [|] symbol between words or partial words. This is extremely powerful.

For example, the entry… **1000|dy|4 x NZ** would return any line that contains these phrases in the nominated column. In the case shown in the picture, the line "**DY**NAMIX **1000 VA** Line Interactive UPS Incorporates **4 x NZ** Power Sockets" would be the result.

Quickfind is available throughout Quotemaster in areas where it is needed.

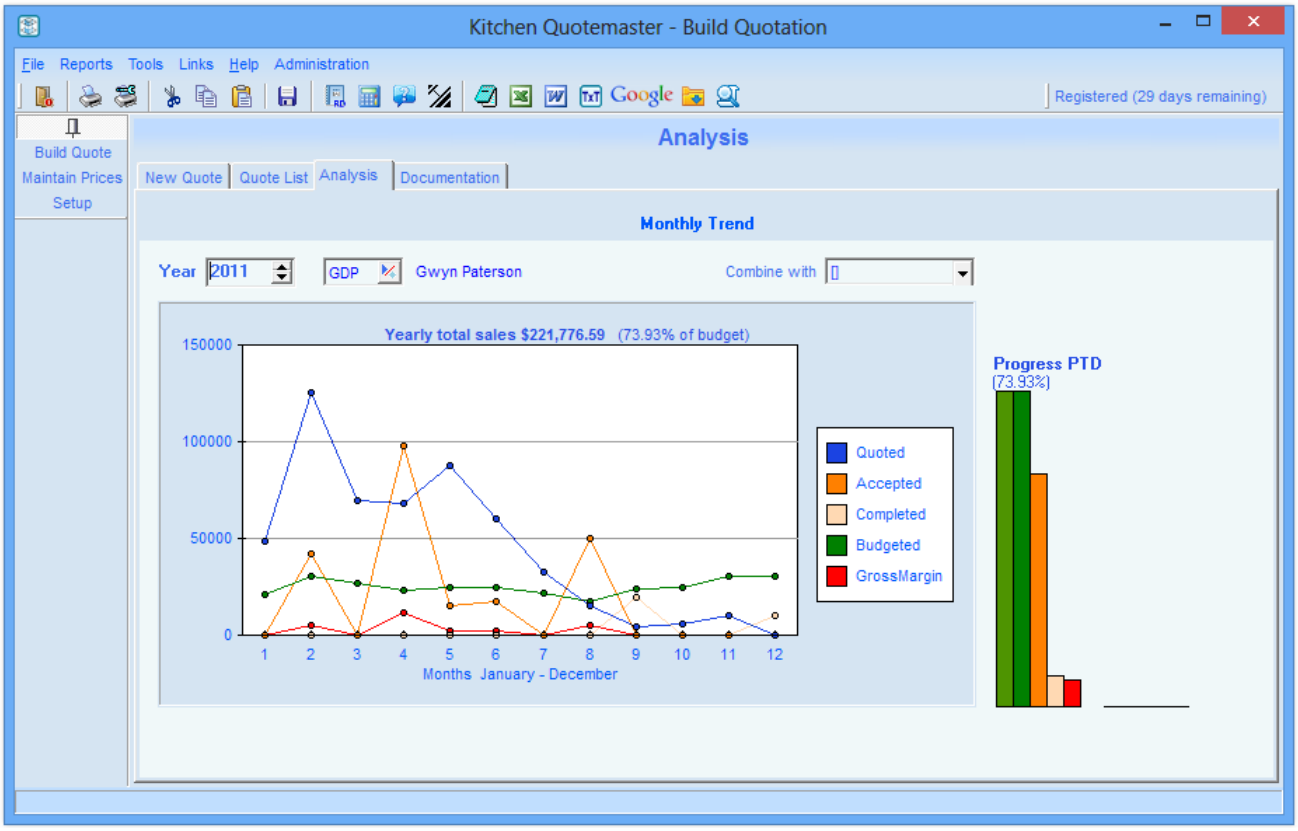
Analysis

Working with sales targets is an important part of quoting. QM provides tools for this in the form of graphs and in copy and pasting to a spreadsheet. In grids, by selectively using the filters and column display options, you can copy all to clipboard. Whatever is visible only will be included. This gives you the freedom to use the most powerful tools that are available in your spreadsheet application.

For a quick summary of progress, there are two sections in Quotes that provide graphs that can be copy and pasted into whatever application you wish to use.

Quote Analysis

The graph below offers five views of the quote statistics…



The graph is a year-to-date (starting from January) view of the value of quotes and accepted quotes.

The values here can be skewed somewhat by multiple "what if" quotes for the same project, but the Accepted Quotes can be relied on given that sometimes a client may only order part of the supplied quotation.

With the available selection tools, you can combine the results of two or more sales people.
The graphs can be copy and pasted into whatever application you wish to use for reporting to managers.

Setup screen

The tabs on this screen are for settings and configuration of Kitchen Quotemaster including a special password protected tab for manager only access called “Restricted”

Each individual tab is explained in detail below…

Budgets

Each sales person should have targets set for performance and this is where to create the entries. The information here will be used in the presentation of graphs in the Analysis sections.

There are two types of budget targets…

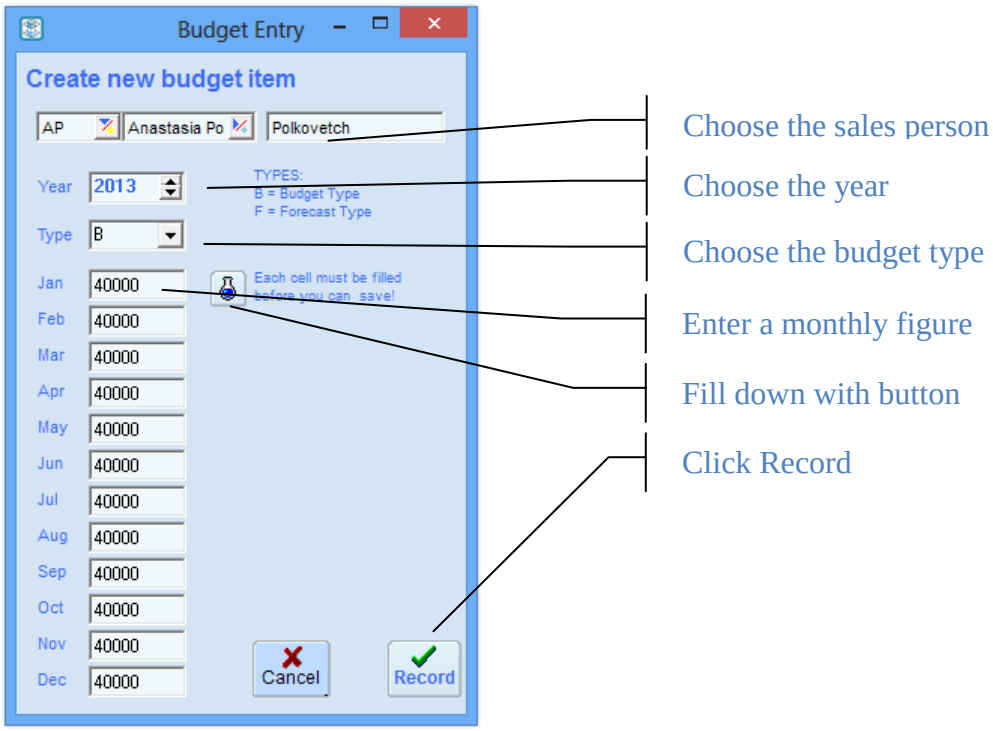
B = Budget Type
F = Forecast Type

Budget Type is the target (*usually set by management with an annual total*) for each sales person and will vary according to seasonal expectations. Budget Type is the most important of the three and is used to compare actual sales against target sales in the graphs.

Forecast Type is really a modifier of Budget Type and allows a sales person to estimate in advance what he thinks his sales will be based on his win expectations. The figures are expected to be maintained by the sales person as needed. As the months progress, the Forecast will become the actual sales for each month.

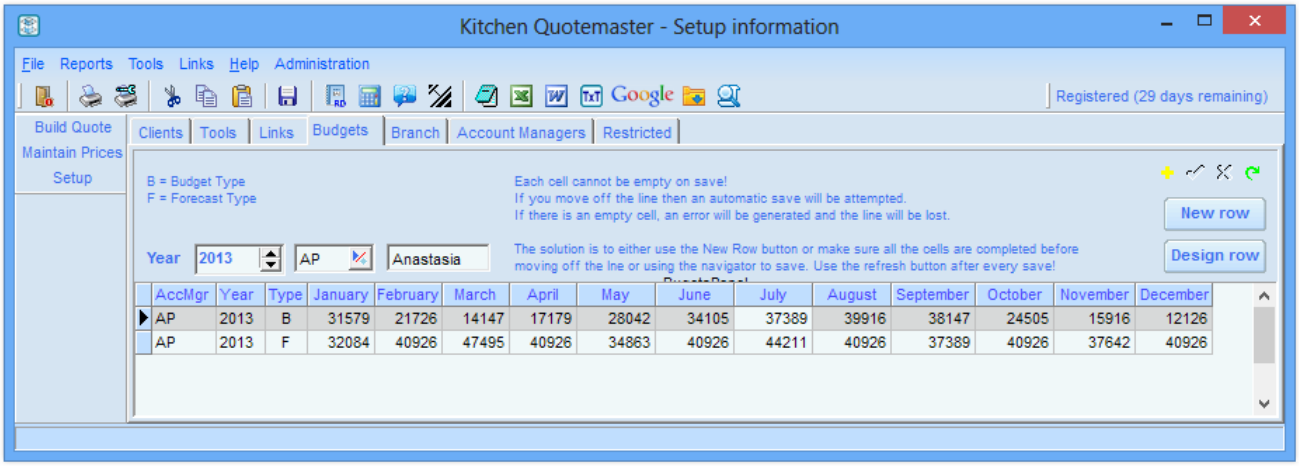
Creating new budget entries

The **New Row** button provides a tool to make new entries simple and easy…



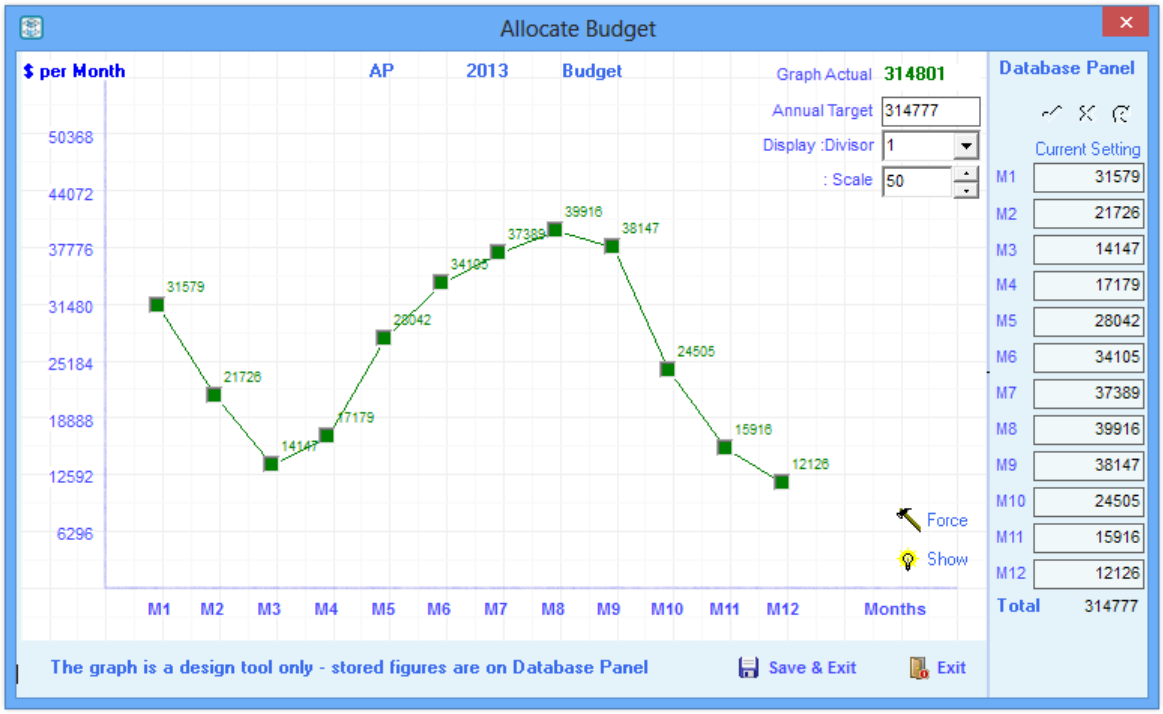
Don’t worry about getting the figures accurate at this stage – we just need a filled row.
Do this with all budget types if applicable.

You may end up with something like the screen below…



Designing budget graphs and figures

Use the **Design Row** button to open up the design tool…



You can now play around with the graph by dragging the green squares up or down to change the shape of the graph.

Graph Actual is the total reflected by the current graph points

Annual Target is the total of the monthly figures in the Database Panel

Display Divisor is the figures divisor for display purposes

Display Scale is the scale for the graph positions. The graph positions on screen are based on percentages and using a different scale can give more accurate results when using Force.

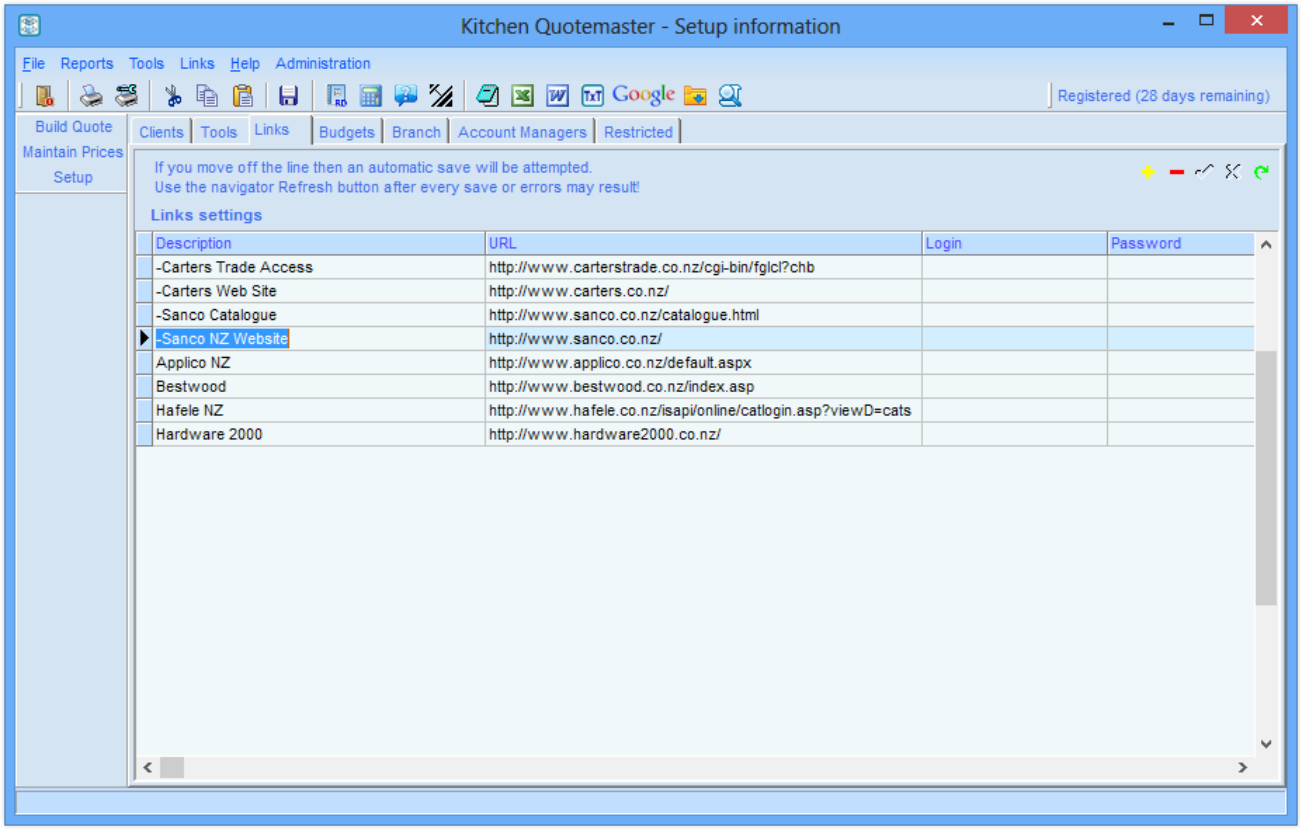
Force Attempts to force the graph points to match the annual target using the designed shape.

Because of percentage calculations the result may not match exactly to the desired total

When you have finished and are happy with the results, Save and Exit.

Links

The links menu dropdown is a list of convenient web URLs that you need to access frequently or need to remember easily.



Link Description is the part that appears in the menu dropdown. If you precede the line with a dash then the first word is used as a header for submenus (see Carters above) and helps to keep the height of the dropdown to a minimum.

Link URL can be pasted in from your web browser

Login is for sites that require authentication

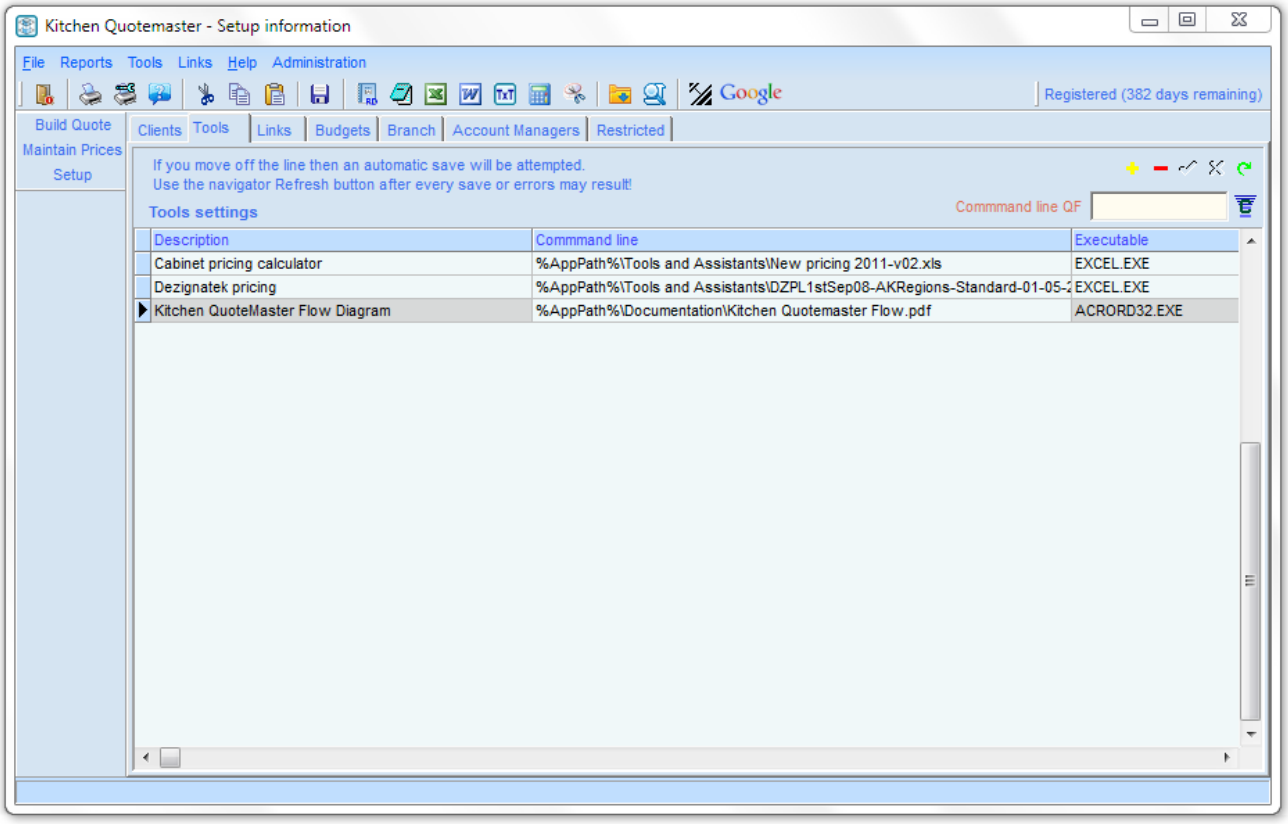
Password gets copied to clipboard each time you select a dropdown to be ready for pasting when challenged in your web browser.

Tips:

- Enter the Link Description first and “click the tick”.
- Don’t use the Quickfind filter while you are adding new rows.
- Restart Kitchen Quotemaster after completing changes

Tools

Tools are essentially the same as Links but with the added functionality to launch application files.



Description is the part that appears in the menu dropdown. If you precede the line with a dash then the first word is used as a header for submenus (see IBM above) and helps to keep the height of the dropdown to a minimum.

Url/Command Line is the parameter passed along with the executable to launch the file.

Executable is the application name required to launch the file

Sort Key is unused

The variable %AppPath% translates to the name of the folder from which Quotemaster is executed and is the parent folder for many of the supporting tools.

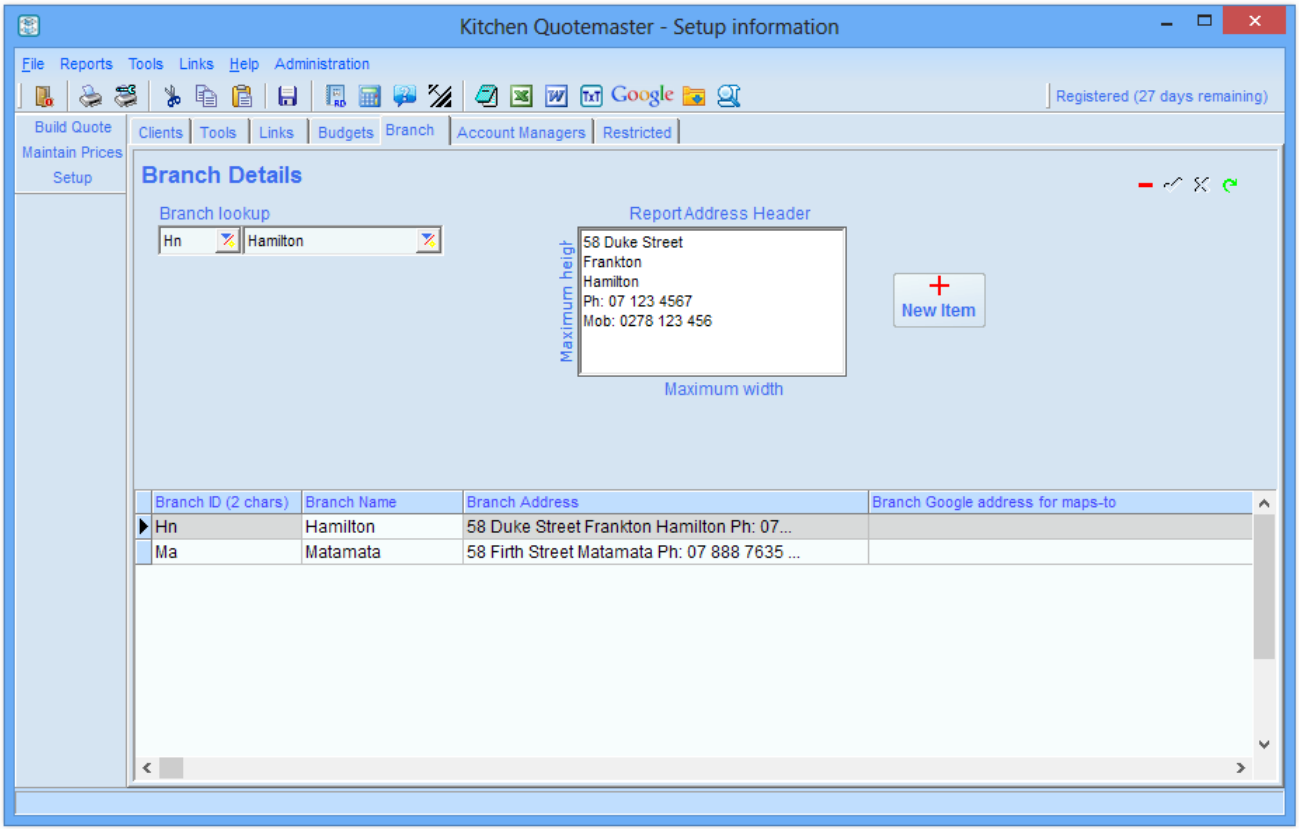
Tips:

- Enter the Link Url/Command first and “click the tick”.
- Don’t use the Quickfind while you are adding new rows.
- Restart Kitchen Quotemaster after completing changes

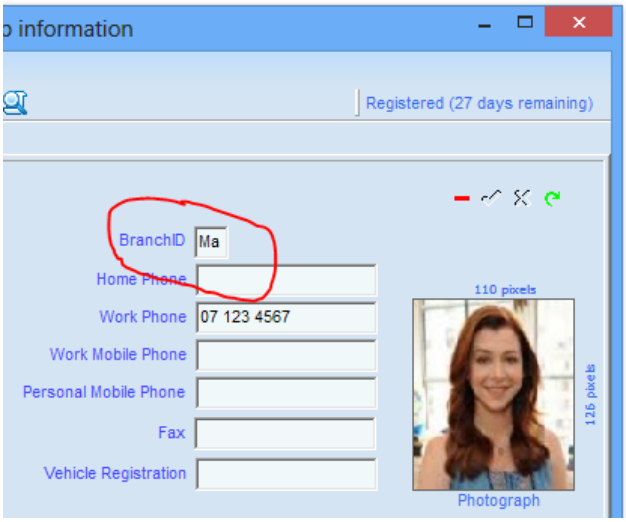
Q. When does a link become a tool?
A. Generally a Url link to a specific file or web application can be best regarded as a “Tool” but it’s entirely up to your discretion.

Branch

The Branch Address is of particular importance in the system and is used in many areas including quote header addresses.



BranchID is the locator for addresses for each Account Manager. In other words if, as per the picture below, your Branch ID is “Hn” then all your quote header addresses will default to the address as above.



Branch Name

This a single word name for the branch that can be used in dropdowns

Branch Address

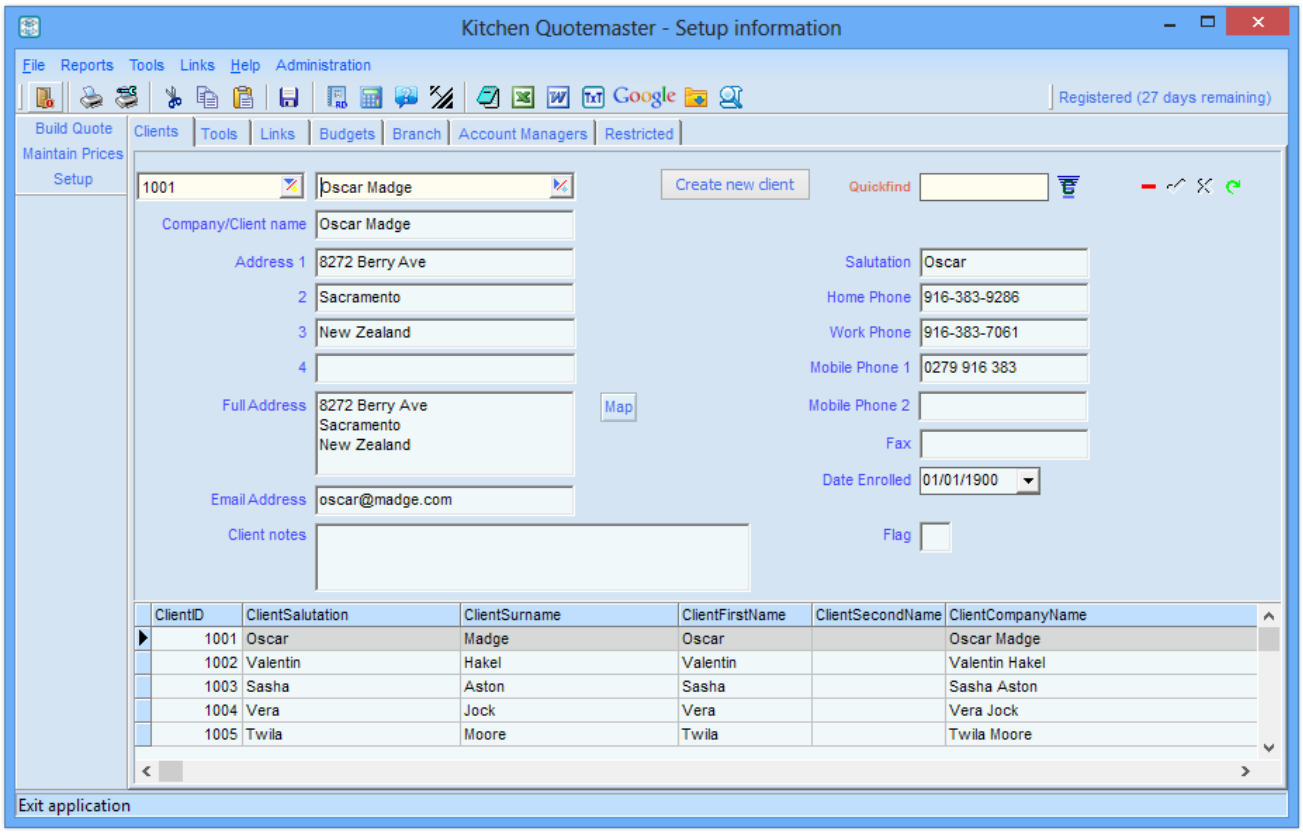
The full address of the branch as it would appear in documents

Branch Google address for maps-to

If you use a MAP button then this is the B address in the Google Get Directions in Google Maps

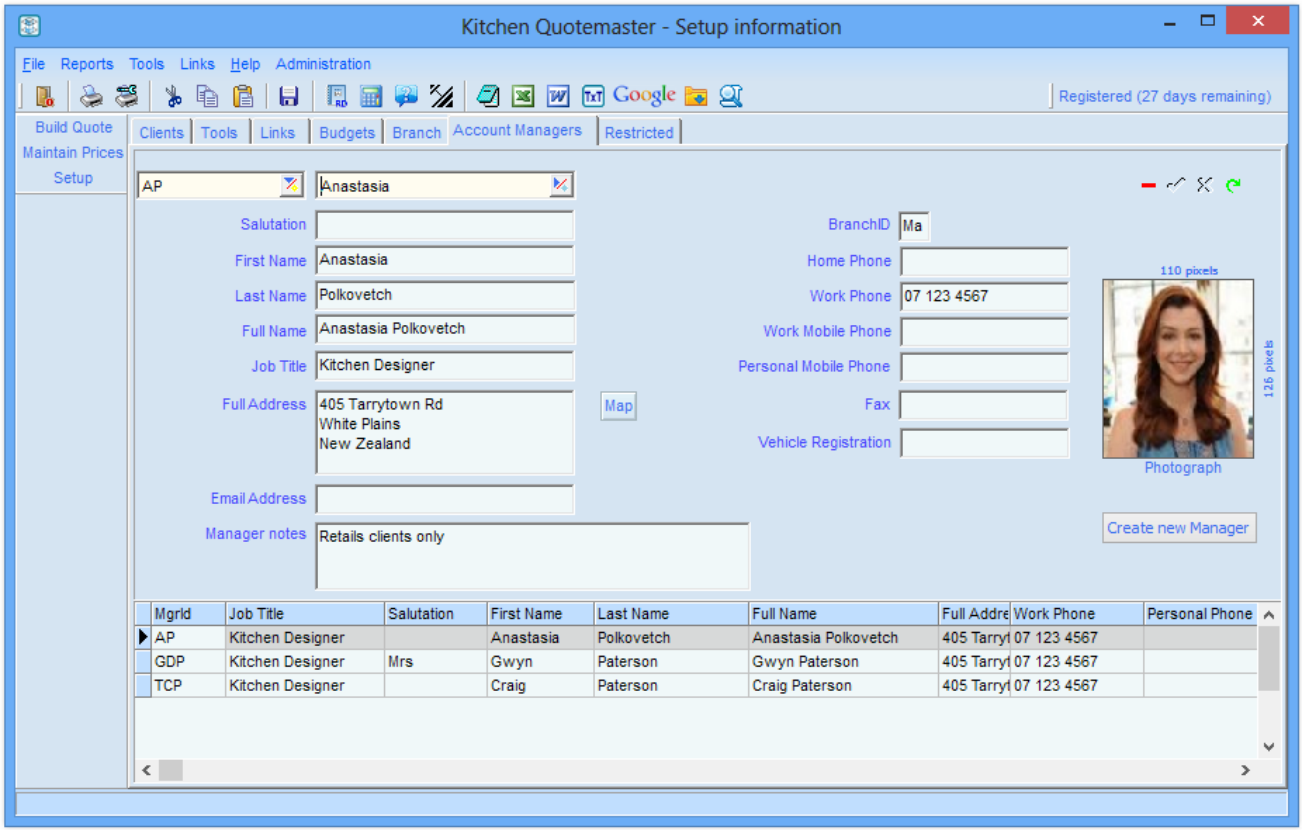
Clients

Maintain or add new clients from this screen which offers a scrolling searchable list.



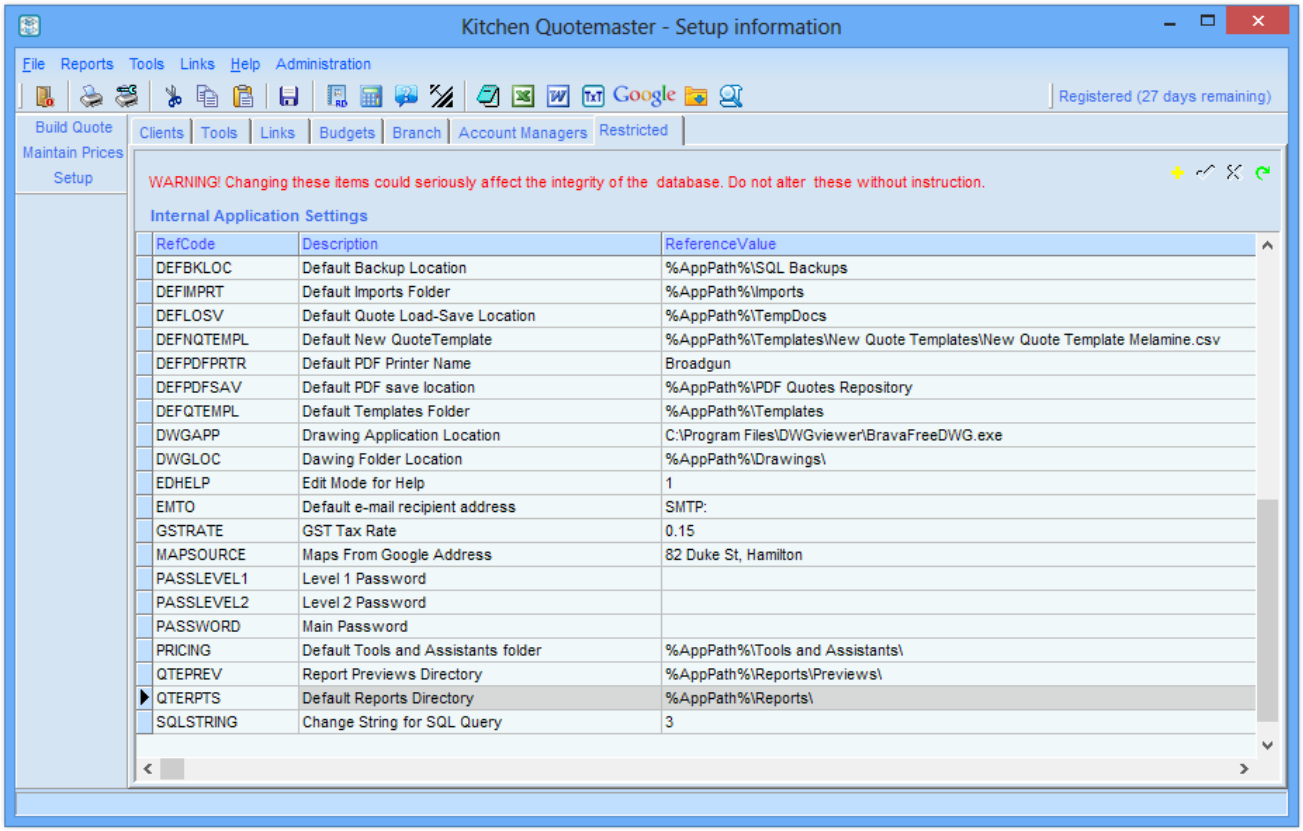
Account Managers

Maintain or add new account managers from this screen which offers a scrolling list.



Restricted

This screen contains all the system settings needed for the application to function and you should not change anything unless you are sure it's the correct action to take.



Code

Code is a predefined identifier for the system to read-in Reference Value settings

Description

The description is for readability only and not used internally

Reference Value

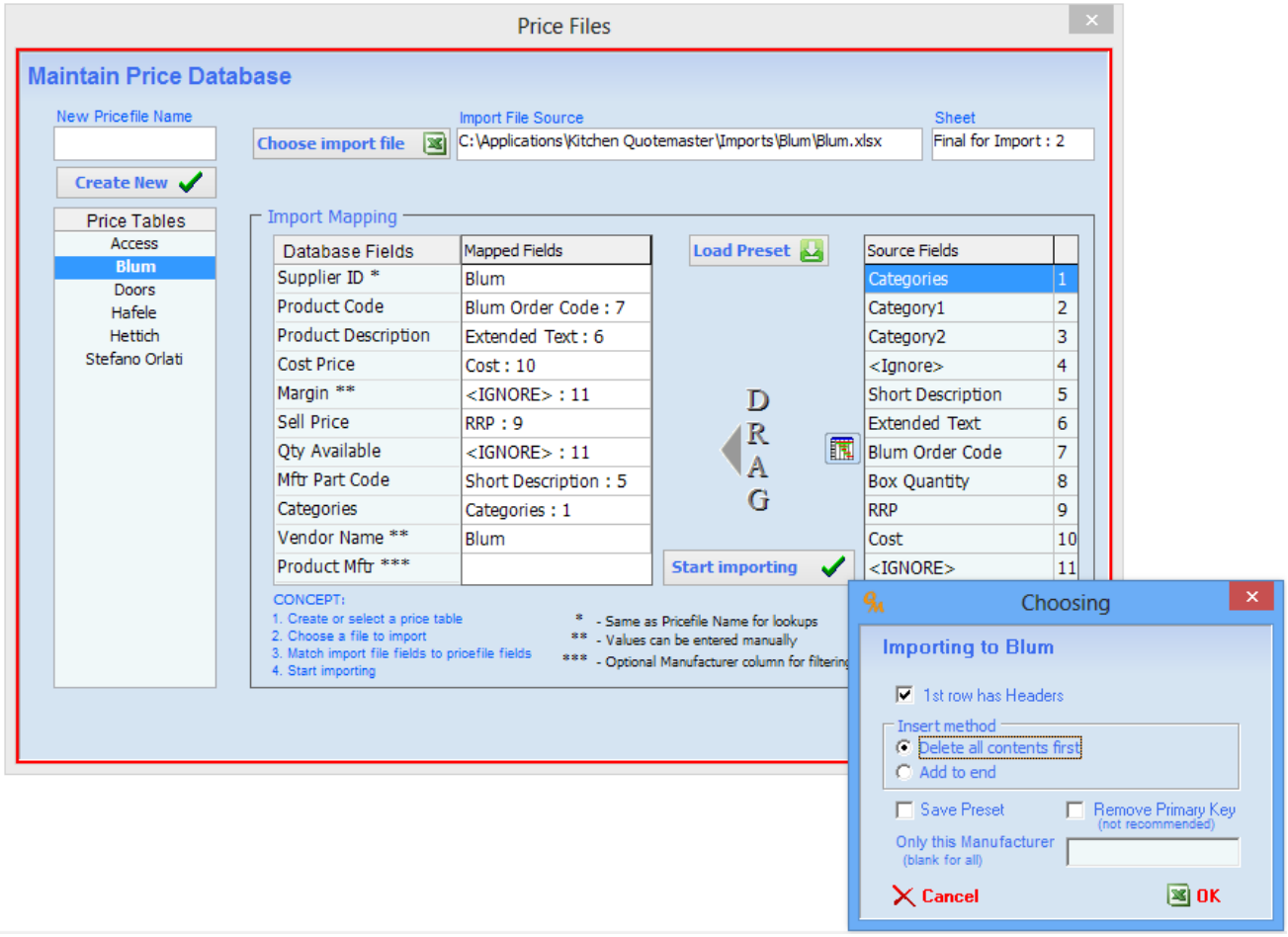
Reference values are the actual settings attached to the Code and have various functions. There are variables and environment strings embedded into the values and translated before use, mainly…

'%USERPROFILE%' (C:\Users\ - *username*-)
'%ALLUSERSPROFILE%' (C:\ProgramData)
'%HOMEDRIVE% (-*a drive letter*-)
'%HOMESHARE%' (-*Terminal Server home*-)
'%AppPath%' (-*QM executable's execution folder*-)

Maintaining Vendor Price Files

The Price file database tables contain vendor items that can be inserted into a quote. These tables are filled by downloading a price list from your supplier and importing it into a Price Table.

- Kitchen Quotemaster can read directly from Excel spreadsheets, comma or tab delimited text files.
- Product database tables can be easily created or removed.
- Fields in the import file can be mapped to the database file using Drag Drop between grids.



About import data.

Price downloads are not always the clean importable files you would expect to receive. Often they have undesirable characters such as tabs, commas, speech marks and carriage returns in the wrong places therefore it is often necessary to clean them up before importing.

Kitchen Quotemaster uses a special format to create the categories/tree structure that makes a search for products simple and logical, but it's up to you to arrange for the import file to contain the necessary data. Vendors have a myriad of techniques for classifying their product lines and there is no real consistency between them. One of the easiest methods is to create your own master spreadsheet that contains two sheets –

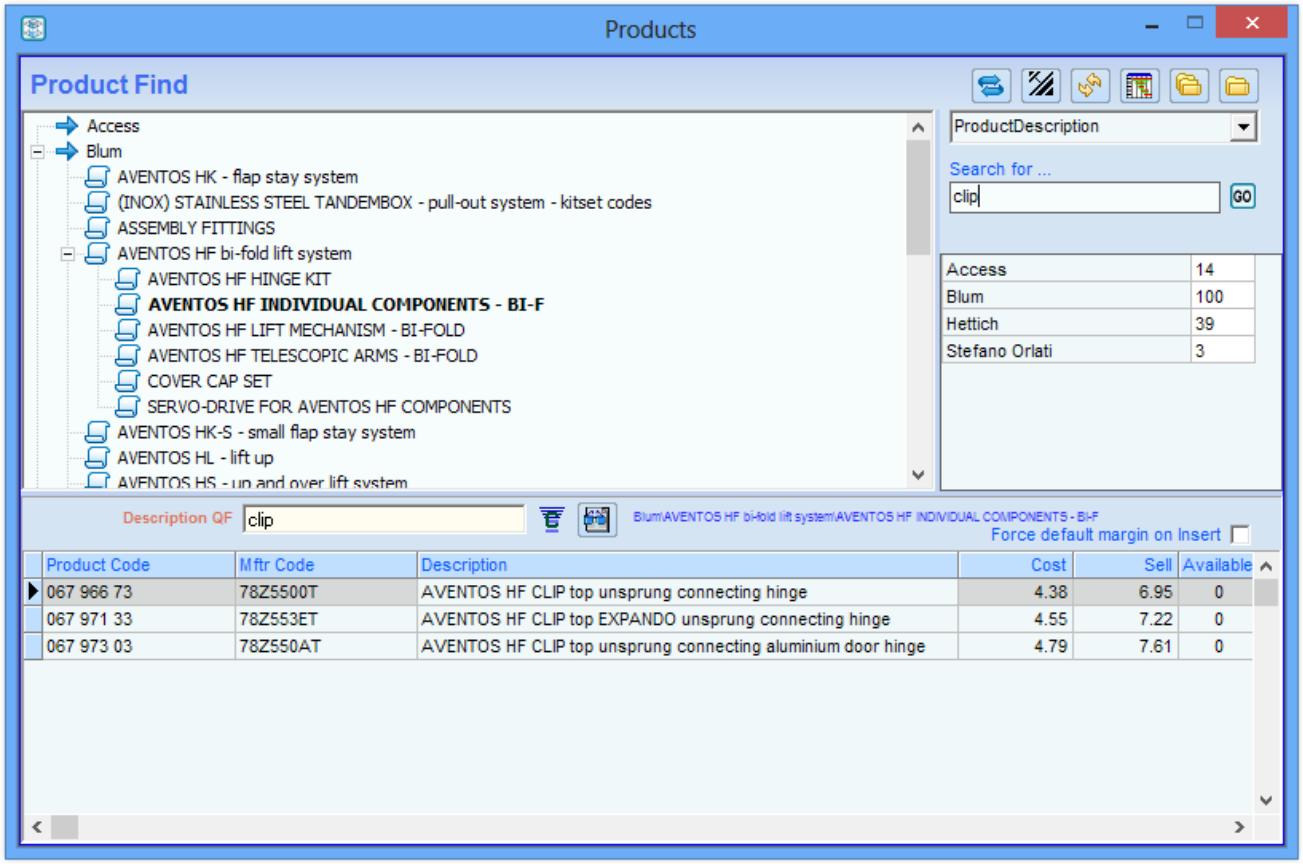
1. The vendor's pricelist
2. Your own sheet which uses linking to reorganize the data.

Several samples of these spreadsheets are included with the Kitchen Quotemaster installation files.

The **Supplier ID/Categories** fields of the price database table are read into the tree by treating backslashes as category delimiters.
For example, category data that looks like “Hinges\mounts\8mm” will create a tree that looks like….

Hinges
    Mounts
        8mm
            ….product item
            ….product item

… up to a maximum of five levels of category.
Sometimes the download contains duplicate product codes and Kitchen Quotemaster will refuse to continue the import if they are encountered – that is, unless you remove the constraint. This is achieved by removing the Primary Key constraint on the database table before importing the file. This is NOT a good idea, but if there is a large number of duplicates and you just need to get the file imported then it’s your choice. The Primary Key is based on the **Product Code** field only, and this is the field used for matching up the “Lookup latest price for item” in quotes.



Product Find is an extremely efficient way of finding vendor part and can be added to the new quote grid from there. Vendors with as many as 250,000 parts are not a problem.

Maintain Prices

There is two parts to maintaining the end product pricing for use in quotes.

1. Cabinet pricing
2. Door pricing

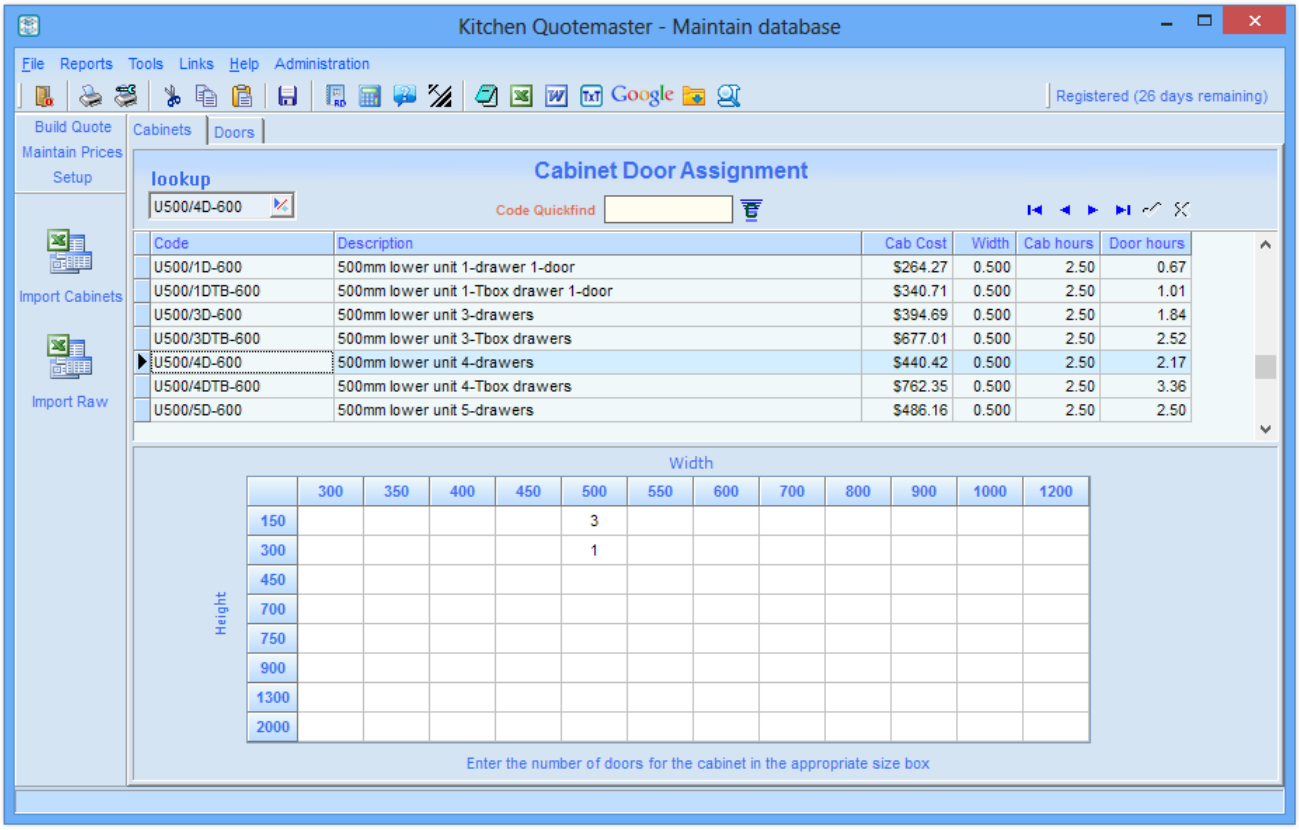
Here are some points to note:

Cabinets have carcass material, hardware and carcass labour (including time to hang doors etc)

Doors have vendor or material costs and time to manufacture the door if locally made.

Cabinet prices are married up with door pricing at the time of building the quote.

All pricing is **cost plus overheads** with only the **Net Profit Margin** being applied at the time of building the quote.



Each cabinet is assigned an array of door sizes as in the image above. The array can also include fixed panels as doors if applicable, for example an open shelf unit made from coloured Melamine.

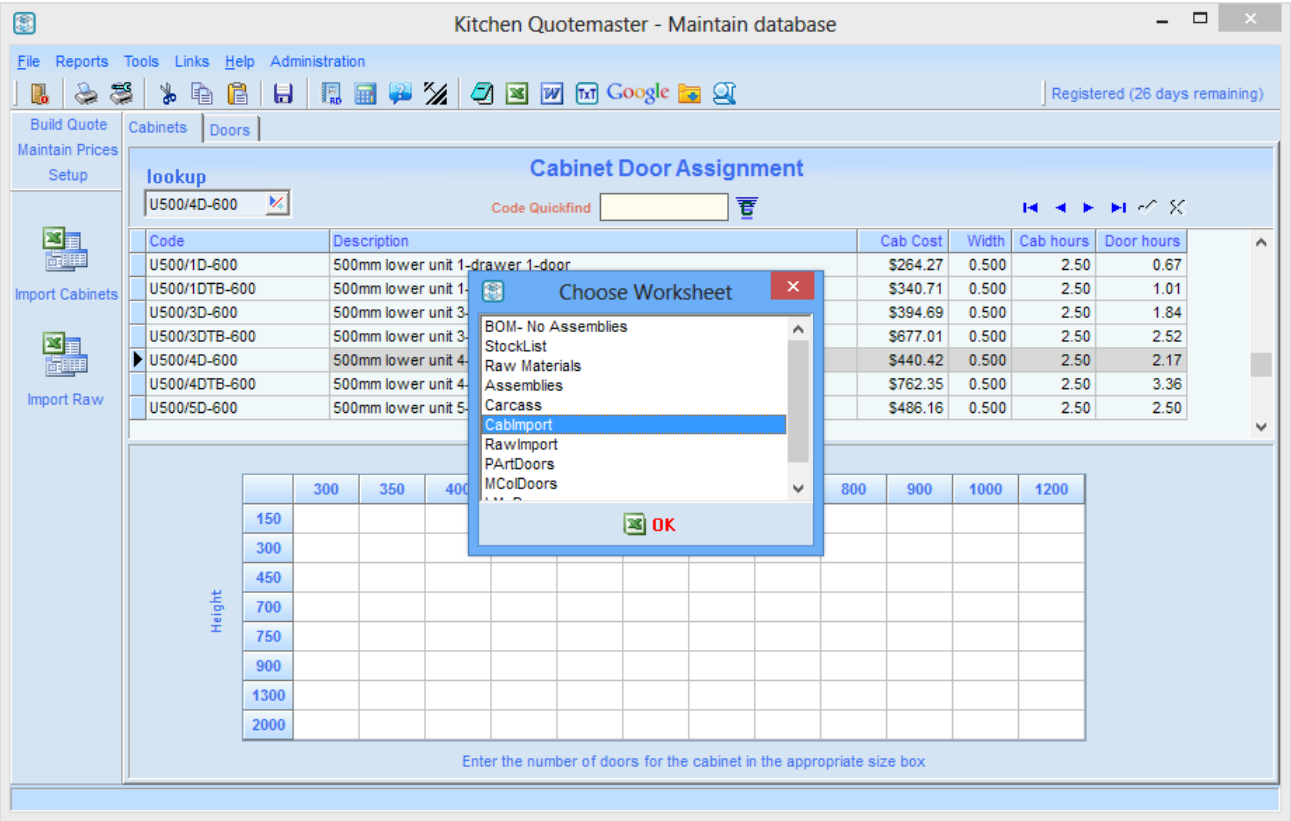
The carcass prices are calculated using an Excel spreadsheet with one of the sheets containing the finished cabinet pricing ready to import into Kitchen Quotemaster.

The door prices are also calculated using an Excel spreadsheet with one sheet for each door style containing the finished door and labour pricing, ready to cut & paste into Kitchen Quotemaster.

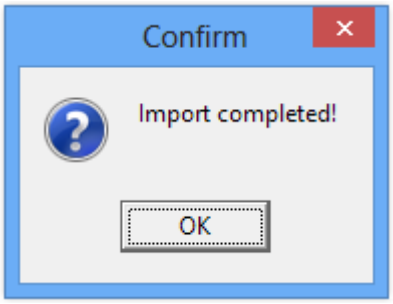
Cabinets that contain special doors such as a Tambour or Glass Doors should be built up in the quote manually.

Import Cabinet Prices

To import cabinets from a spreadsheet click on the Import Cabinets button on the sidebar, after a couple of warnings you will be presented with the screen below …

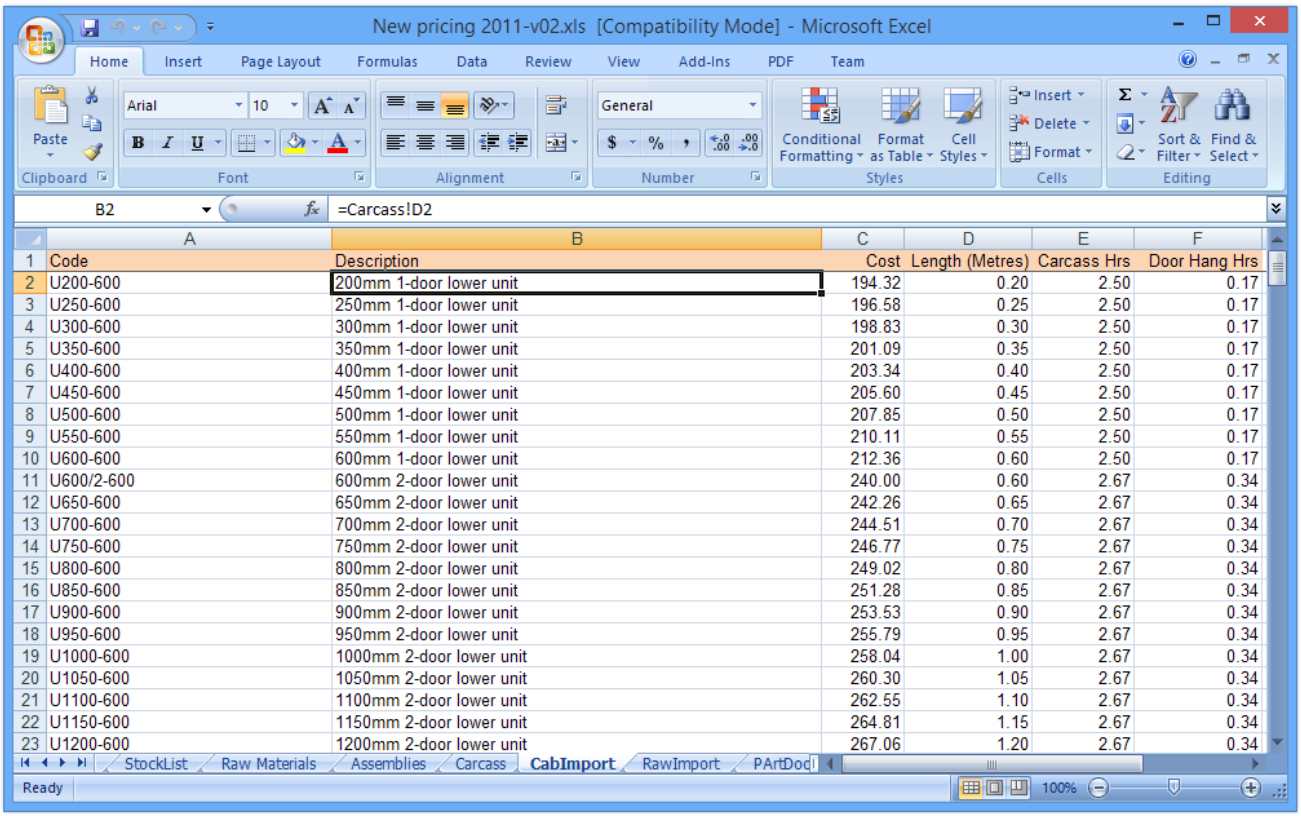


Choose the sheet that contains only the importable cabinet pricing that you have created in Excel. After another two warnings and a chance to abort, given a few seconds to complete the import, you should see the message box below and all should be well.



The new pricing will be immediately available without the need for restarting Kitchen Quotemaster.

What you have just done is to import the cabinet pricing from the spreadsheet as per below.



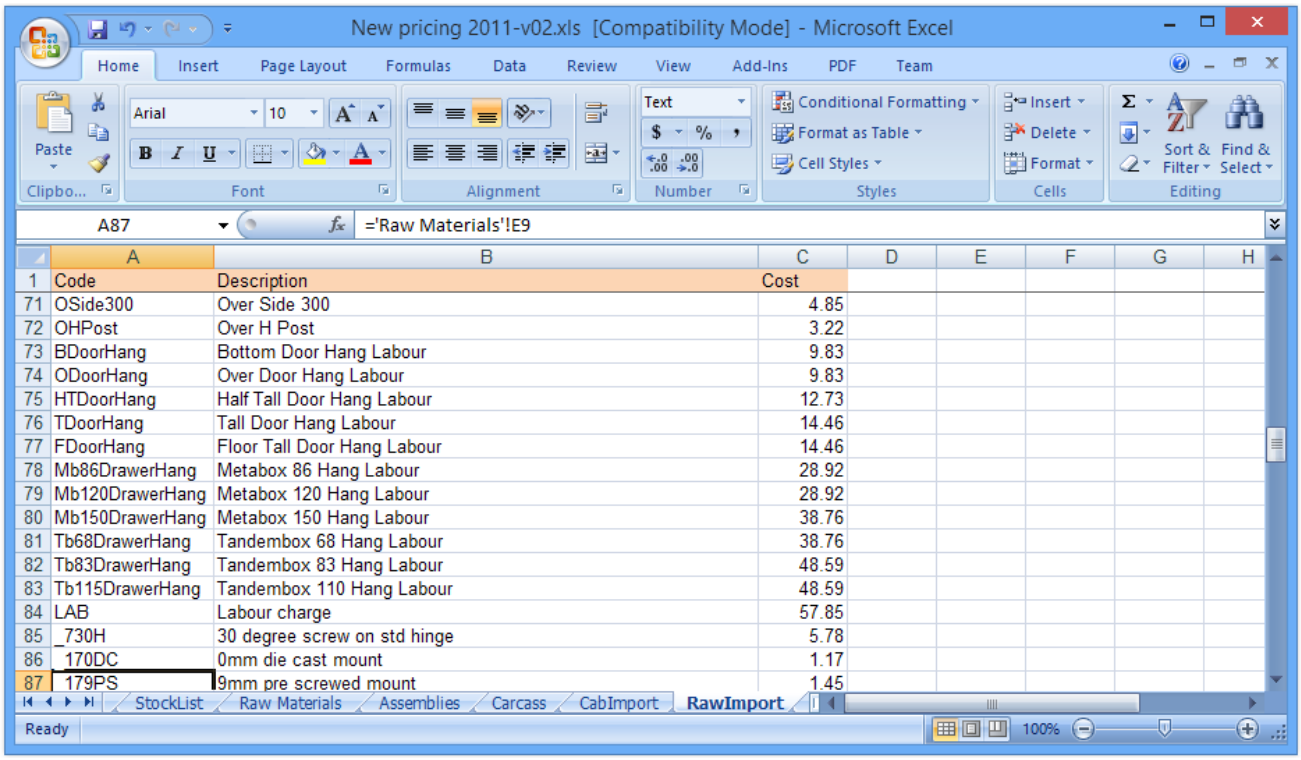
	A	B	C	D	E	F
1	Code	Description	Cost	Length (Metres)	Carcass Hrs	Door Hang Hrs
2	U200-600	200mm 1-door lower unit	194.32	0.20	2.50	0.17
3	U250-600	250mm 1-door lower unit	196.58	0.25	2.50	0.17
4	U300-600	300mm 1-door lower unit	198.83	0.30	2.50	0.17
5	U350-600	350mm 1-door lower unit	201.09	0.35	2.50	0.17
6	U400-600	400mm 1-door lower unit	203.34	0.40	2.50	0.17
7	U450-600	450mm 1-door lower unit	205.60	0.45	2.50	0.17
8	U500-600	500mm 1-door lower unit	207.85	0.50	2.50	0.17
9	U550-600	550mm 1-door lower unit	210.11	0.55	2.50	0.17
10	U600-600	600mm 1-door lower unit	212.36	0.60	2.50	0.17
11	U600/2-600	600mm 2-door lower unit	240.00	0.60	2.67	0.34
12	U650-600	650mm 2-door lower unit	242.26	0.65	2.67	0.34
13	U700-600	700mm 2-door lower unit	244.51	0.70	2.67	0.34
14	U750-600	750mm 2-door lower unit	246.77	0.75	2.67	0.34
15	U800-600	800mm 2-door lower unit	249.02	0.80	2.67	0.34
16	U850-600	850mm 2-door lower unit	251.28	0.85	2.67	0.34
17	U900-600	900mm 2-door lower unit	253.53	0.90	2.67	0.34
18	U950-600	950mm 2-door lower unit	255.79	0.95	2.67	0.34
19	U1000-600	1000mm 2-door lower unit	258.04	1.00	2.67	0.34
20	U1050-600	1050mm 2-door lower unit	260.30	1.05	2.67	0.34
21	U1100-600	1100mm 2-door lower unit	262.55	1.10	2.67	0.34
22	U1150-600	1150mm 2-door lower unit	264.81	1.15	2.67	0.34
23	U1200-600	1200mm 2-door lower unit	267.06	1.20	2.67	0.34

The CabImport sheet is specially laid out in the correct order for the import routine to recognize; therefore the column order left to right should not be changed.

Import Raw Material Prices

Raw Material prices are only a convenience in the quote for building custom cabinet assemblies. They are not used in any other way and can be inserted into the quote as individual items as needed.

To import the raw material pricelist click on the Import Raw button on the sidebar- the process is very similar to importing cabinets.



	A	B	C
1	Code	Description	Cost
71	OSide300	Over Side 300	4.85
72	OHPost	Over H Post	3.22
73	BDoorHang	Bottom Door Hang Labour	9.83
74	ODoorHang	Over Door Hang Labour	9.83
75	HTDoorHang	Half Tall Door Hang Labour	12.73
76	TDoorHang	Tall Door Hang Labour	14.46
77	FDoorHang	Floor Tall Door Hang Labour	14.46
78	Mb86DrawerHang	Metabox 86 Hang Labour	28.92
79	Mb120DrawerHang	Metabox 120 Hang Labour	28.92
80	Mb150DrawerHang	Metabox 150 Hang Labour	38.76
81	Tb68DrawerHang	Tandembox 68 Hang Labour	38.76
82	Tb83DrawerHang	Tandembox 83 Hang Labour	48.59
83	Tb115DrawerHang	Tandembox 110 Hang Labour	48.59
84	LAB	Labour charge	57.85
85	_730H	30 degree screw on std hinge	5.78
86	_170DC	0mm die cast mount	1.17
87	179PS	9mm pre screwed mount	1.45

Door Cost Management

Doors are not imported as such because it is simpler and easier to just Copy & Paste them in from the master spreadsheet. All you have to do is select the grid items in the spreadsheet and copy with Ctrl + C, and then RightClick on the top left cell of the Kitchen Quotemaster doors grid and *Paste selection from clipboard*. (See below).

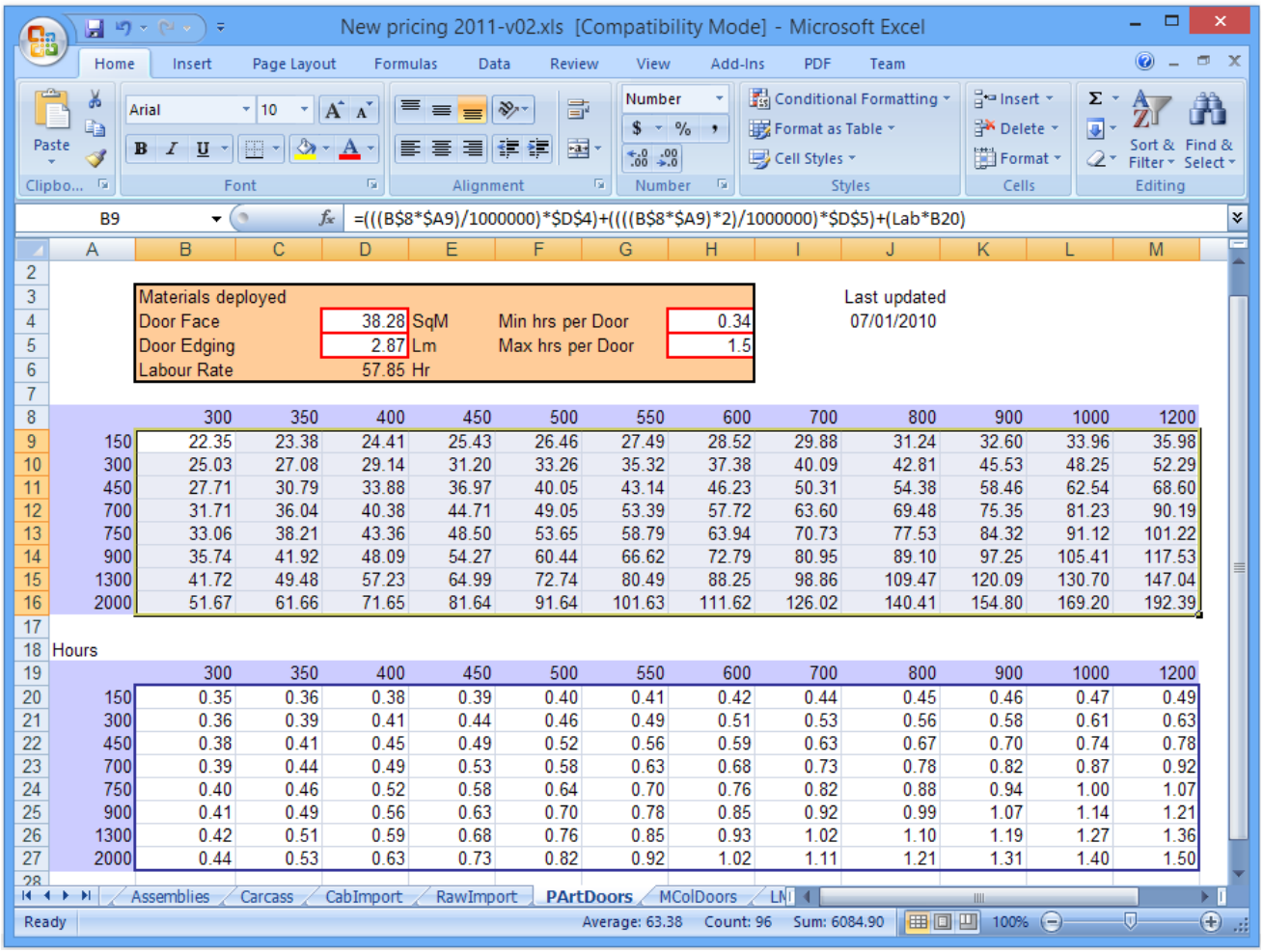
There are two grids for each door style…

1. The actual door prices including manufacturing labour if applicable.
2. The hours to manufacture each door if made locally, which allows the time to be extracted for showing in the quote detail.

Copy each in turn into Kitchen Quotemaster.

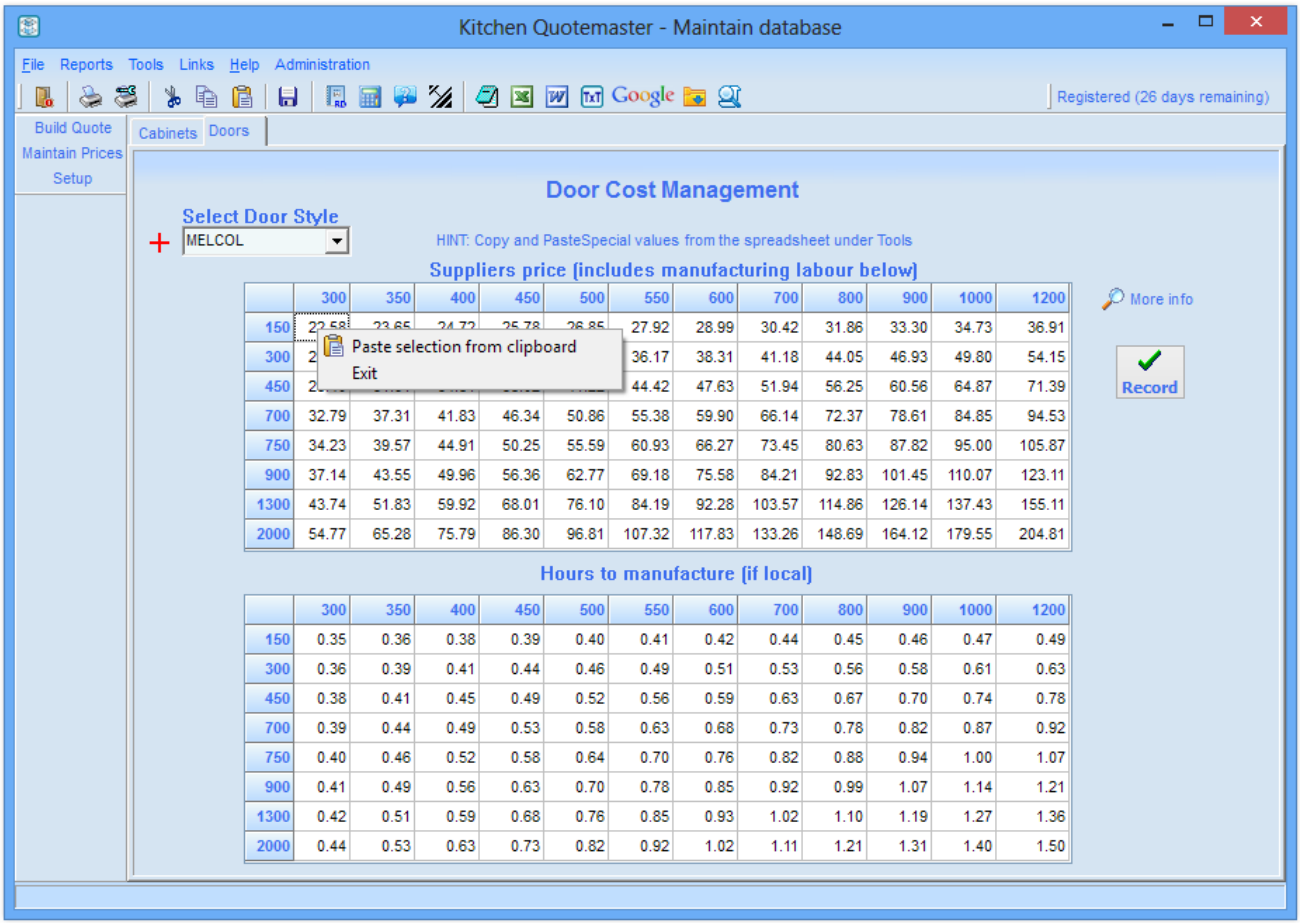
Note that you CANNOT use Ctr + V to paste; this is a special process in the Kitchen Quotemaster grids.

In the spreadsheet below there are hidden cells so be careful if modifying the layout to suit your own needs. There is however no reason why you cannot design your own grid formula as long as it's in the same grid layout and achieves the resulting prices/hours you need.



Select then copy with Ctrl + C

RightClick on the top left cell of the Kitchen Quotemaster doors grid and *Paste selection from clipboard*.



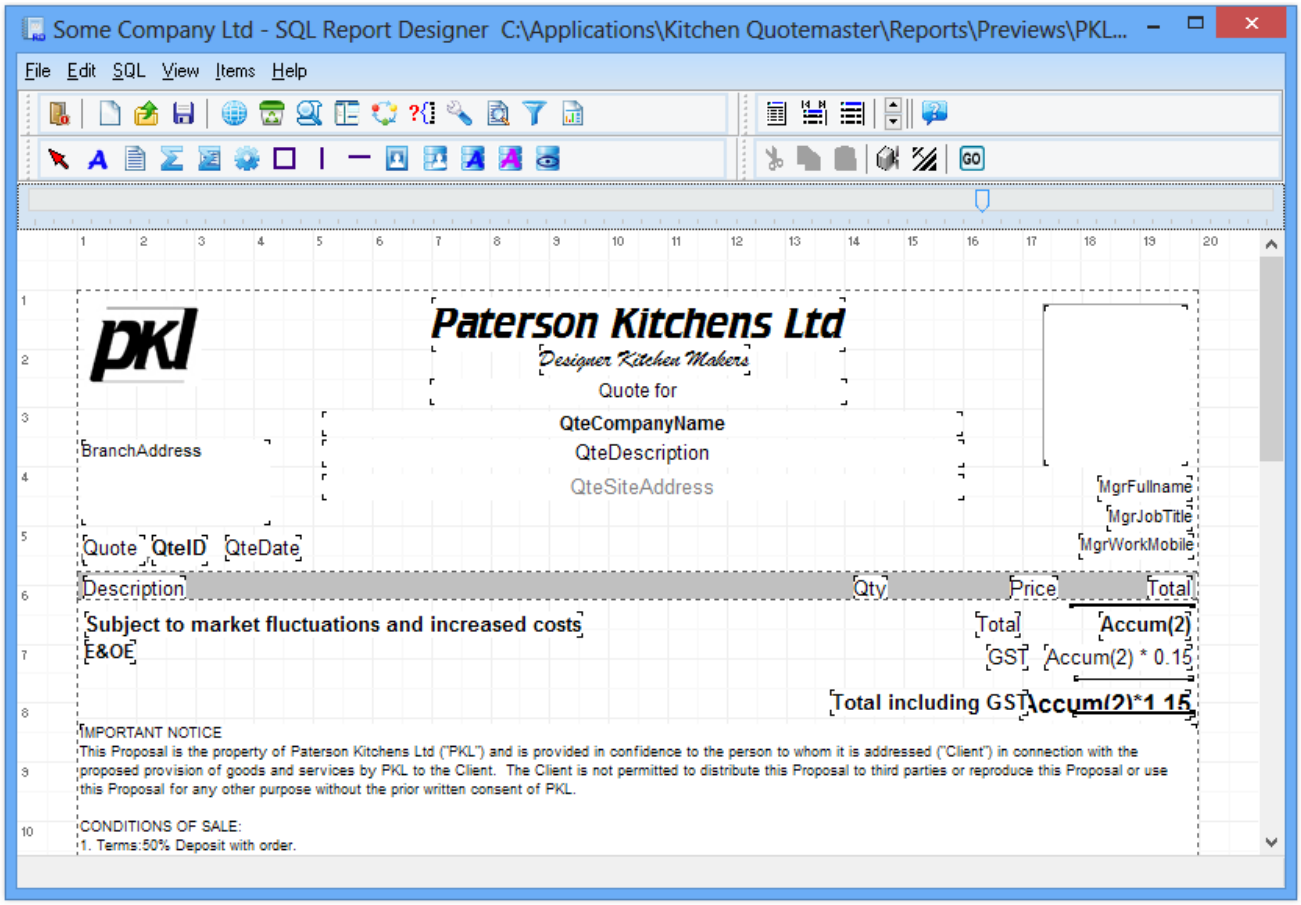
	300	350	400	450	500	550	600	700	800	900	1000	1200
150	22.58	23.65	24.72	25.78	26.85	27.92	28.99	30.42	31.86	33.30	34.73	36.91
300	2					36.17	38.31	41.18	44.05	46.93	49.80	54.15
450	2					44.42	47.63	51.94	56.25	60.56	64.87	71.39
700	32.79	37.31	41.83	46.34	50.86	55.38	59.90	66.14	72.37	78.61	84.85	94.53
750	34.23	39.57	44.91	50.25	55.59	60.93	66.27	73.45	80.63	87.82	95.00	105.87
900	37.14	43.55	49.96	56.36	62.77	69.18	75.58	84.21	92.83	101.45	110.07	123.11
1300	43.74	51.83	59.92	68.01	76.10	84.19	92.28	103.57	114.86	126.14	137.43	155.11
2000	54.77	65.28	75.79	86.30	96.81	107.32	117.83	133.26	148.69	164.12	179.55	204.81

	300	350	400	450	500	550	600	700	800	900	1000	1200
150	0.35	0.36	0.38	0.39	0.40	0.41	0.42	0.44	0.45	0.46	0.47	0.49
300	0.36	0.39	0.41	0.44	0.46	0.49	0.51	0.53	0.56	0.58	0.61	0.63
450	0.38	0.41	0.45	0.49	0.52	0.56	0.59	0.63	0.67	0.70	0.74	0.78
700	0.39	0.44	0.49	0.53	0.58	0.63	0.68	0.73	0.78	0.82	0.87	0.92
750	0.40	0.46	0.52	0.58	0.64	0.70	0.76	0.82	0.88	0.94	1.00	1.07
900	0.41	0.49	0.56	0.63	0.70	0.78	0.85	0.92	0.99	1.07	1.14	1.21
1300	0.42	0.51	0.59	0.68	0.76	0.85	0.93	1.02	1.10	1.19	1.27	1.36
2000	0.44	0.53	0.63	0.73	0.82	0.92	1.02	1.11	1.21	1.31	1.40	1.50

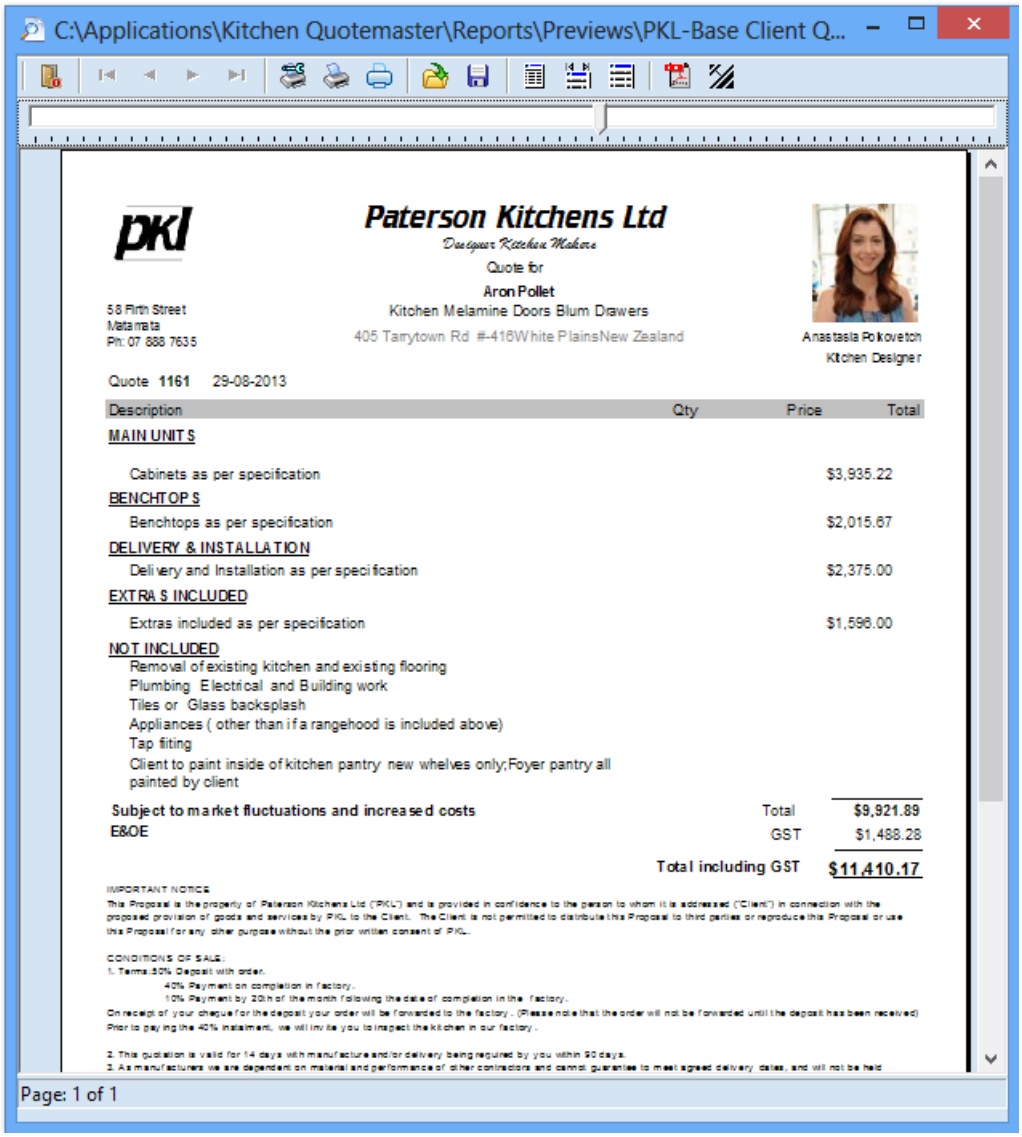
About form design with Report Designer

The way in which you present quote detail can be controlled almost entirely by designing the right quote form layout. By having multiple quote forms you can have a much or a little detail that you want to show in the client quote.

Using the Report Designer requires a reasonable technical expertise therefore Nexial Software will provide you with a basic set of layouts that you can alter later if you need. You just need to provide your Logo and Images.



There is a separate instruction manual dedicated to Report Designer included with the installer.


C:\Applications\Kitchen Quotemaster\Reports\Previews\PKL-Base Client Q...
pkl
Paterson Kitchens Ltd
Designer Kitchen Makers
Quote for
Aron Pollet
Kitchen Melamine Doors Blum Drawers
405 Tarrytown Rd #-416White PlainsNew Zealand
58 Firth Street
Metamata
Ph: 07 888 7635
Anastasia Polkovetch
Kitchen Designer
Quote 1161 29-08-2013
Description Qty Price Total
MAIN UNITS
Cabinets as per specification $3,935.22
BENCHTOPS
Benchtops as per specification $2,015.67
DELIVERY & INSTALLATION
Delivery and Installation as per specification $2,375.00
EXTRAS INCLUDED
Extras included as per specification $1,596.00
NOT INCLUDED
Removal of existing kitchen and existing flooring
Plumbing Electrical and Building work
Tiles or Glass backsplash
Appliances (other than if a rangehood is included above)
Tap fiting
Client to paint inside of kitchen pantry new whelves only;Foyer pantry all painted by client
Subject to market fluctuations and increased costs
E&OE
Total $9,921.89
GST $1,488.28
Total including GST $11,410.17
IMPORTANT NOTICE
This Proposal is the property of Paterson Kitchens Ltd ("PKL") and is provided in confidence to the person to whom it is addressed ("Client") in connection with the proposed provision of goods and services by PKL to the Client. The Client is not permitted to distribute this Proposal to third parties or reproduce this Proposal or use this Proposal for any other purpose without the prior written consent of PKL.
CONDITIONS OF SALE:
1. Terms:50% Deposit with order.
40% Payment on completion in factory.
10% Payment by 20th of the month following the date of completion in the factory.
On receipt of your cheque for the deposit your order will be forwarded to the factory. (Please note that the order will not be forwarded until the deposit has been received)
Prior to paying the 40% instalment, we will invite you to inspect the kitchen in our factory.
2. This quotation is valid for 14 days with manufacture and/or delivery being required by you within 90 days.
3. As manufacturers we are dependent on material and performance of other contractors and cannot guarantee to meet agreed delivery dates, and will not be held
Page: 1 of 1