



Products & Quotes – Datasheet PQ

For fast response to enquiries and orders

The Products & Quotes module is for accurate quotations and processing orders quickly and easily. It is most useful where the cutting requirements arise in producing assembled products; kitchens units, bedroom units, housings, furniture ...

The product library can detail any job:-

- Standard product ranges
- Custom products
- Products with extra parts and fittings
- Can include lipping and bought in items ...

The key to the module is that the product detail is very flexible - a single definition can cover a wide range of customer or production variations.

For each order once the customer request for colour, material, size, fittings are specified the program can calculate the full set of materials, sizes, and quantities for all the parts in the product.

The result is a cutting list ready for the saw or machining centre.

Orders screen

A versatile order screen allows the entry of order for quotes or production.

Quotes / orders - Products & parts order

File Edit Options Help

Order ☐ Order date 01/12/2010 Customer code CS1001 Customer name Kitchens Direct Delivery date 14/12/2010

Products & parts order

Contact John Smith

Terms 30 Days

Status Estimated

Invoice address Ashford Road Birmingham

Delivery address Unit 7 Canal Road Birmingham

Postcode B11 2RX Postcode B12 4JJ

Notes Credit OK No Sat Deliveries

Extra customer information

Taken by Customer reference Description Example of quote Optimising Saw Over

Variables Mode Edit

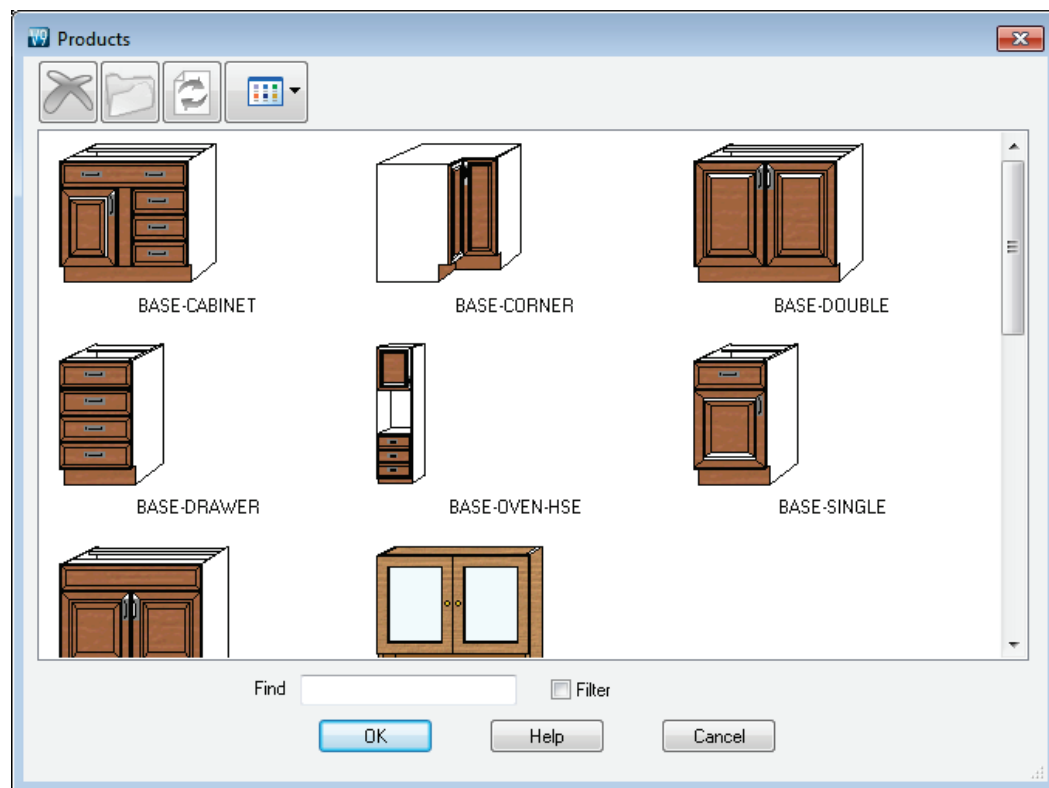
Single base unit

No	Code	Information	Product			Part						Qty	Unit price	Total price
			Width	Height	Depth	Material	Length	Width	Grain	Edge	Inf			
1	BASE-SINGLE	Single base unit	500.0	870.0	600.0							7	43.02	301.14
2	BASE-SINK	Sink base unit	1000.0	870.0	600.0							2	46.02	92.04
3	WALL-DOUBLE	Double wall unit	1000.0	750.0	300.0							5	38.65	193.25
4	WALL-SINGLE	Single wall unit	500.0	750.0	300.0							3	23.37	70.11
5	F-UNIT-DOOR	Fixed size unit door				MED-D...	495.0	570.0	N	0000		4	4.02	16.08
6	F-UNIT-END-LEFT	Fixed size unit end left				MEL-CH...	585.0	870.0	N	0000		4	4.50	18.00
7	F-UNIT-END-RIGHT	Fixed size unit end right				MEL-CH...	585.0	870.0	N	0000		4	4.48	17.92
8	Z-SINGLE	Single Knob										23	0.95	21.85
9	Y-PACKING	Packing										14	6.00	84.00
10														
11														
12														
13														
14														
15														
16														

The top section allows for the entry of customer details, delivery and invoice address etc. In the grid enter the required products and other items.

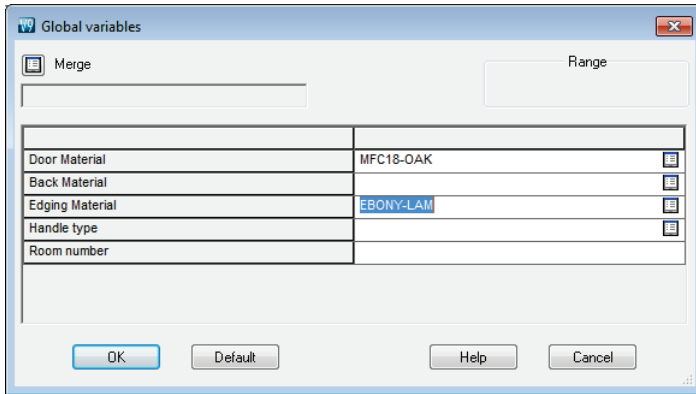
Full costs are shown and the system can be set to several different pricing models.

Products and other items are selected from the product library.



Click on an item to select it. The list view can be changed from pictures to details in the usual way.

Where the product is defined as a parametric (variable) product the Order screen prompts for the customer's requirements (and production requirements).



The image shows a software dialog box titled "Global variables". It contains a "Merge" button with a list icon, a "Range" text field, and a table with five rows. The table has two columns: the first column lists variable names, and the second column shows their current values. Each row in the table has a small list icon on the right. Below the table are four buttons: "OK", "Default", "Help", and "Cancel".

Door Material	MFC18-OAK
Back Material	
Edging Material	EBONY-LAM
Handle type	
Room number	

The requirements can vary for each product line even for the same style of product.

There are a full set of facilities (variables, look up tables, formulae) with the Product library for creating parametric products.



Once the order is complete the order can be estimated at the single click of a button.

Totals			
Date		11/04/2006	
Discount code	A	Per order discount %	5.0
Tax code	MIDLA	Tax rate	17.5
Overhead	0.0	Percentage for mark up	0.0
Total order cost			825.94
Overhead amount			0.00
Mark up - amount			0.00
Total order amount			825.94
Order discount amount			-41.30
Order amount - including discount			784.64
Carriage			0.00
Invoice total pre tax			784.64
Tax			137.31
Total due			921.96
OK		Cancel	

The order status can be tracked and the Form & Label designer can be used to produce customer documents:-

Quotation
Advice note
Delivery note
...



Once an order is confirmed the order is optimised and the cutting patterns produced ready to send to the saw or machining centre.

Review runs

File Edit View Settings Summaries Help

Pattern preview **Example of quote**

Products & parts order:///DEFAULT/?DEFAULT/??

Ptn:7 Board:2.MED-DEN-FIBRE-18... Qty:1 Material:MED-DEN-FIBRE-18...	Ptn:8 Board:2.MED-DEN-FIBRE-18... Qty:1 Material:MED-DEN-FIBRE-18...	Ptn:9 Board:2.MED-DEN-FIBRE-18... Qty:1 Material:MED-DEN-FIBRE-18...
Ptn:10 Board:2.MED-DEN-FIBRE-18... Qty:1 Material:MED-DEN-FIBRE-18...	Ptn:11 Board:2.MED-DEN-FIBRE-18... Qty:1 Material:MED-DEN-FIBRE-18...	Ptn:12 Board:2.MED-DEN-FIBRE-18... Qty:1 Material:MED-DEN-FIBRE-18...

Batch reports
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With the 'Review runs' option the run can be checked and reports produced before sending cutting data to a saw or machining centre.

The production and delivery documents are set up in the Form & Label designer - the program includes many different templates to help with the design of forms.

 GLOBAL FURNITURE LTD Furniture House, 27 Wood Lane, Bristol, BS1 2XR, UK Telephone: +44 (0)117 933 6323 Fax: +44 (0)117 933 6487					
Order confirmation					
Date: 23/05/2012		Order No. Products & parts order		Our ref.	
Payment terms: 30 Days		Delivery expected: 14/12/2010		Your ref.	
Customer address Kitchens Direct Ashford Road Birmingham		Delivery address Unit 7 Canal Road Birmingham			
B11 2RX		B12 4JJ			
Item	Code	Information	Quantity	Unit £	Total £
1	BASE-SINGLE	Single base unit Carcase: MED-DEN-FIBRE-18MM Finish: MFC18-OAK Handle: Z-DOUBLE	7	43.76	306.32
	Width: 500.0 Height: 870.0 Depth: 600.0				
2	BASE-SINK	Sink base unit Carcase: MED-DEN-FIBRE-18MM Finish: MFC18-OAK Handle: Z-DOUBLE	2	46.96	93.92
	Width: 1000.0 Height: 870.0 Depth: 600.0				
3	WALL-DOUBLE	Double wall unit Carcase: MED-DEN-FIBRE-18MM Finish: MFC18-OAK Handle: Z-DOUBLE	5	39.18	195.90
	Width: 1000.0 Height: 750.0 Depth: 300.0				
Page: 1					

The above example, shows a detailed order confirmation.

DEMO USER 1		Modular V9.0		Wednesday 23 May 2012 15:40			
Product costing		Example of quote					
Ref Products & parts order		Description Example of quote				Over 0	
NO	Code	Qty	Information	Width	Height	Length	
1.	BASE-SINGLE	7	Single base unit	500.0	870.0	600.0	
DOORMATERIAL: MFC18-GAK		CARCASEMATERIAL: MED-DEN-FIBRE-180M					
RACKMATERIAL: HAREBGARD-40M		EDGING: GAK-TAPE-220M					
HANDLITYPE: 2-DOUBLE		TFS:					
NRNG: LEFT		SHELPDEPTH: 400.0					
ROOMNUMBER:		FR: 125.0					
NR: 150.0		DR: 1.0					
Code	Qty	Description	Material	Length	Width	Item cost	Total
BASE-END-LEFT	1	Base unit end le	MED-DEN-FIBRE-1	582.0	870.0	6.355	6.355
Description: Base unit end left Material: MED-DEN-FIBRE-180M							
BASE-END-RIGHT	1	Base unit end ri	MED-DEN-FIBRE-1	582.0	870.0	6.355	6.355
Description: Base unit end right Material: MED-DEN-FIBRE-180M							
BASE-BACK	1	Base unit back	MED-DEN-FIBRE-1	476.0	735.0	1.006	1.006
BASE-BOTTOM	1	Base unit floor	MED-DEN-FIBRE-1	582.0	582.0	3.487	3.487
Material: MED-DEN-FIBRE-180M							
BASE-PLINTH	1	Base unit plint	MED-DEN-FIBRE-1	464.0	125.0	1.060	1.060
Material: MED-DEN-FIBRE-180M							
BASE-RAIL-FRONT	1	Base unit rail f	MED-DEN-FIBRE-1	660.0	150.0	1.524	1.524
Description: Base unit rail front Material: MED-DEN-FIBRE-180M							
BASE-RAIL-BACK	1	Base unit rail b	MED-DEN-FIBRE-1	660.0	150.0	1.025	1.025
Description: Base unit rail back Material: MED-DEN-FIBRE-180M							
BASE-SHELF	1	Base unit shel	MED-DEN-FIBRE-1	660.0	400.0	1.365	1.365
Material: MED-DEN-FIBRE-180M							
BASE-DRAWER	1	Base unit drawe	MFC18-GAK	500.0	186.2	2.606	2.606
BASE-DOOR	1	Base unit door	MFC18-GAK	500.0	554.8	4.255	4.255
*BUDC	1	Base unit drawe	carcase	462.0	148.3	546.0	
Description: Drawer carcase left Material: WHITE-ACRYLIC-120M							
BUDC-RIGHT	1	Drawer carcase	WHITE-ACRYLIC-1	546.0	136.3	1.320	1.320
Description: Drawer carcase right Material: WHITE-ACRYLIC-120M							
BUDC-BACK	1	Drawer carcase	WHITE-ACRYLIC-1	438.0	136.3	1.320	1.320
Description: Drawer carcase back Material: WHITE-ACRYLIC-120M							
BUDC-BOTTOM	1	Drawer carcase	WHITE-ACRYLIC-1	626.0	546.0	1.320	1.320
Description: Drawer carcase bottom Material: WHITE-ACRYLIC-120M							
2-DRAWER-SCREEN	13	Acrylic drawer	WHITE-ACRYLIC-1	0.120		1.560	
Description: Acrylic drawer screen							
2-DOUBLE	2	Pull handle	WHITE-ACRYLIC-1	1.210		2.420	
ER180-HINGE	2	Hinge 180	HHK123-321	0.400		0.800	
Description: Hinge 180 HHK123-321							
2-DOWEL	22	Dowel	WHITE-ACRYLIC-1	0.120		2.640	
2-SHELF-SUPPORT	4	Shelf support	WHITE-ACRYLIC-1	0.190		0.760	
2-RUNNER	2	Drawer runner	WHITE-ACRYLIC-1	0.430		0.860	
Z540-4-CUSHN-SCREEN	8	Cushn Screw 40m	WHITE-ACRYLIC-1	0.010		0.080	
Description: Cushn Screw 40m							
Y-ASSEMBLY	180	Cabinet Assembly	WHITE-ACRYLIC-1	6.500		0.325	
						435.763	
2.	BASE-SINK	2	Sink base unit	1000.0	870.0	600.0	
DOORMATERIAL: MFC18-GAK		CARCASEMATERIAL: MED-DEN-FIBRE-180M					
RACKMATERIAL: HAREBGARD-40M		EDGING: GAK-TAPE-220M					
HANDLITYPE: 2-DOUBLE		TFS:					
SHELPDEPTH: 400.0		FR: ROOMNUMBER:					
FR: 125.0		NR: 150.0					
DR: 1							
Code	Qty	Description	Material	Length	Width	Item	Total
BASE-END-LEFT	1	Base unit end le	MED-DEN-FIBRE-1	582.0	870.0	6.355	6.355

There is also a full breakdown for the costs of all parts and other items in the order.

Review runs

File Edit View Settings Summaries Help

Job costing

Example of quote

Products & parts order

Code	Description	Quant...	Linear	Area	Cost	Total
Board	Material	Quant...		Area	Cost/m2	Total
HARDBOARD-4MM/01	HARDBOARD-4MM 2440.0 x 122...	5		14.884	0.890	13.247
MED-DEN-FIBRE-18...	MED-DEN-FIBRE-18MM 3050.0 x...	7		32.559	4.500	146.514
MFC18-OAK/01	MFC18-OAK 3050.0 x 1220.0	1		3.721	3.300	12.279
MFC18-OAK/02	MFC18-OAK 2440.0 x 1220.0	3		8.930	2.970	26.523
MEL-CHIP-18MM/02	MEL-CHIP-18MM 2440.0 x 1220.0	2		5.954	3.140	18.694
		18		66.048		217.258
Sundry	Material	Quant...	Linear	Area	Cost	Total
WHAC12/01	WHITE-ACRYLIC-12MM	28			1.320	36.960
		28				36.960
Edging	Description	Quant...			Cost/m	Total
OAK-TAPE-22MM	Oak PVC Tape 22mm	113.300			0.840	95.172
WHITE-TAPE-22MM	White PVC Tape 22mm	8.840			0.550	4.862
		122.140				100.034
Fitting	Description	Quant...			Cost	Total
3000000	3000000	24			1.320	31.680

Summaries

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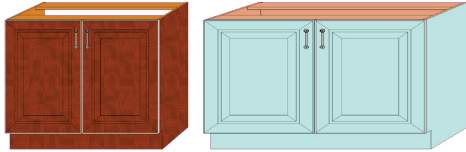
The costs include all the elements of the job, for example, material costs, edging cost, cost of fittings etc.



Product library

The heart of the PQ module is the product library for building and storing parametric products.

The product library deals with custom or variable products in product ranges.



A single parametric product record can be defined to cover a wide range of options. The program automatically works out the correct part sizes and quantities based on the customer and/or production requirements.

In the above example there are two products produced from the same template. One with different materials, different sizes and one with no back.

This approach is very efficient and accurate since the program does all the calculating of sizes and quantities as the product requirements change from customer to customer.

Product library

File Edit Help














Type

Product

Code

BASE-DOUBLE

Description

Double base unit

X Width

☒ Def

1000.0

Y Height

☐ Def

870.0

Z Depth

☒ Def

600.0

Vertical position

☐ Def

Price (fx)

☒ Def

=IF(X<=1000,33.00,42.20)

Answer table

Memo

1

2

3

4

5

6

7

8

9

10

Product

BASE-DOUBLE

Double base unit

1000.0

870.0

600.0

=IF(X<=1000,33.00,42.20)

Answer table

1

2

3

4

5

6

7

8

9

10

Add

Insert

Delete

Parts

Subs

@

fx

\$

	Part	Quan...	Description	Material	Length	Width
1.	D-BASE-END-LEFT	1	Double base unit end L	@CARCASEMATERIAL@	=Z-T1(@DOORMATERIA...	=Y
2.	D-BASE-END-RIGHT	1	Double base unit end R	@CARCASEMATERIAL@	=Z-T1(@DOORMATERIA...	=Y
3.	BASE-BACK	1	Base unit back	@BACKMATERIAL@	=&INTERNAL_WIDTH&...	=&BACK_PAN...
4.	D-BASE-BOTTOM	1	Base unit floor	@CARCASEMATERIAL@	=&INTERNAL_WIDTH&...	=Z-T1(@DOOR...
5.	BASE-PLINTH	1	Base unit plinth	@CARCASEMATERIAL@	=&INTERNAL_WIDTH&...	=@PH@
6.	D-BASE-RAIL-FRONT	1	Double base unit rail F	@CARCASEMATERIAL@	=&INTERNAL_WIDTH&...	=@RH@
7.	BASE-RAIL-BACK	1	Base unit rail back	@CARCASEMATERIAL@	=&INTERNAL_WIDTH&...	=@RH@
8.	BASE-SHELF	1	Base unit shelf	@CARCASEMATERIAL@	=&INTERNAL_WIDTH&...	=@SHELFDE...
9.	D-BASE-DOOR/L	1	Base unit door left	@DOORMATERIAL@	=X/2-2	=Y-2-@PH@
10.	D-BASE-DOOR/R	1	Base unit door - right	@DOORMATERIAL@	=X/2-2	=Y-2-@PH@
11.	D-BASE-DIVIDER	1	Base unit divider	@CARCASEMATERIAL@	40.0	=Y-2-T1@CAR...
12.	ZDD4B-BROWN-HANDLE	2	Handle 4" D Brown	+		

The details can include a drawing (from an external file e.g. bmp) or a drawing from the built-in drawing library.

The important point is that the product details such as Material or Length can be defined as variables e.g. @CARCASEMATERIAL@ or formulae &INTERNAL WIDTH&

The variable is answered at the order screen where the customer material is entered e.g. TEAK or BEECH-18MM and the formula is pre-defined formula that depends on the material thickness. There are tables for defining variables, lookup tables, and formulae.



A customer database is included in Quote for entering and storing customer and sales details.

Customer database

File Record View Help

Customer code: CS1001

Customer name: Kitchens Direct

Invoice address: Ashford Road, Birmingham

Delivery address: Unit 7, Canal Road, Birmingham

Postcode: B11 2RX

Postcode: B12 4JJ

Telephone: 0121 344 6798

Fax: 0121 455 3321

Contact: John Smith

Payment terms: 30 Days

Discount code: A

Analysis codes: 1 MIDLANDS, 2, 3

Notes: 1 Credit OK, 2 No Sat Deliveries, 3, 4, 5

The task of building up the product details can be quite a lengthy and complex process - but the program includes many examples and templates to aid the process.

Products & Quotes

Products & Quotes requires one of the Optimising modules; LO, SO, PO, NE
Products & Quotes usually requires the PL module for parametric products

	PQ + PL
Product records	Unlimited
Customer records	Unlimited
Drawing library	•
External product drawings	•
Parametric products	•
Quotations	•
Job costing	•
Product costing	•
Flexible orders	•
Form & Label designer	•
Printed forms	•
Integrated local help	•