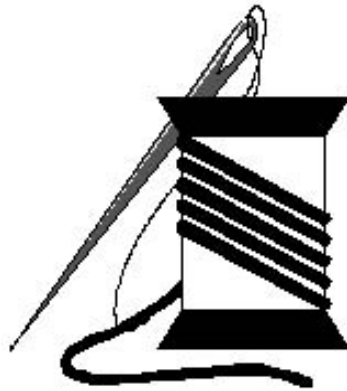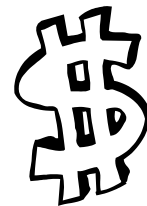# E-Z E$timator Software

6.5

User Manual

January 2005

**Embroidery
Business Package**

Heat Press

**Screen Printing
Stitch Estimating**

E-Z Stitches
Embroidery Specialists
301-253-3971
sew@ezstitches.com

Preface

All home based and commercial embroidery people and companies have heard these questions a thousand times, "How much is it?   And when can I get it?" The E-Z Estimator may provide some of the answers.   The Production Time Estimator will generate reasonable time estimates, while the Cost Estimator will prepare cost estimates using cost competitive tables that may be customized by you.   These are only the tip of the E-Z Estimator iceberg.   The versatility of this system will amaze you.

This software has been in use for over 5 years, and the requests for "Can I get a copy of it", prompted the commercial release of E-Z Estimator 3.5, 4.5, 5.5 and now 6.5.   It has been tested in five countries, and the testers were embroiderers, just like you.   I am confident, you will like it, use it, and profit from it!

This year, three major features were added to the product – Heat Press and Screen Printing estimates and their related functions, setups, and reports.   The catalog functions associated with Heat/Screen will find their way into the embroidery modules in the next release of E-Z Estimator.   There was no time left in the development schedule to include the newer processes.

The third feature is the unbundling of the complete system.   You can purchase JUST WHAT YOU NEED, and add to that need at any time.   For example, if you currently are an embroiderer, and add heat press capability to your business expansion, you can upgrade your E-Z Estimator software to include the Heat Press Module.   The details are presented in the manual.

For my friend, Dan Dilley, I use your quote with great pleasure.   Dan always has a smile and story to add to Utopia-ville.   The quote is still valid.

"In Embroidery-land, There is no Utopia!"

The E-Z Estimator was originally developed for all embroiderers who have ever or have reluctantly had to prepare time and cost estimates.   It will make your embroidery life just a little E-Z-er, and hopefully, more profitable.   And now with the addition of the Heat Press and Screen Printing processes, your expansion business application are included in the E-Z Estimator system.

Release 6.5 continues to present the Graphics on quotes, email of quotes and invoices, use your own data in the system (along with graphics), more business documents, and a myriad of reports, invoices, statements, purchase orders, and preview images.   Get client history of activity with your company.

A feature list is included in the manual. Also added to this version is the answer to the question, Does it interface with my accounting package – YES by exporting the data to Microsoft Excel, you can move your data to most accounting and database systems. The Business Package and the Stitch Estimator are now separate items – but are included in the Embroidery Modules. These changes are monumental for all embroiderers. All to assist you in making the business application processes simpler to perform. Have a little fun, and make the documents suit your company, and personality.

Thank you for your purchase.

Best regards,

Jim Serritella
E-Z Stitches, Inc.
301-253-3971
Laytonsville, MD

P.S. Just added as we went to press… a special interface for the software package "MyThreadBox". Check the interface box in your company screen, and visit the site to view the features of this neat package. www.mythreadbox.com If you are user of the MyThreadBox software, then you're familiar with the great advantages of color matching different supplier threads.

Table of Contents

Disclaimers

Software products that have an implied statement of increased operational benefits to the user include a disclaimer statement to exclude any level of liability to the manufacturer, E-Z Stitches, Inc. These disclaimers for the E-Z Estimator software product are presented to meet this requirement.

Software/Hardware – This program loads on the user hardware with no detrimental impact to the user software or hardware configurations.

Operational – This software is for estimating the production time to embroider a garment(s), and/or obtain an estimated market price for the services and material supplied by the embroiderer. Any miscalculations or incorrect time estimates are not the responsibility of E-Z Stitches, Inc. E-Z Stitches, Inc. is not responsible for incorrect data entry or pricing table modifications by the user of this product.

The screen images in the manual may have been updated in the software and not in the manual. The content remains the same allowing for a more pleasant presentation of the information.

The **E-Z Estimator Stitch Worksheet** is provided with the following disclaimer. The estimates generated by the user are reasonable estimates of stitch counts based upon the values and suppositions provided by the user. The actual number of stitches generated as a result of the formal digitizing procedure may vary based upon numerous embroidery practices and application process. The processes by which the estimates are computed are the property of E-Z Stitches, Inc. The formulas are included in this software for the purpose of enhancing the value of the overall E-Z Estimator product.

The **E-Z Estimator Appliqué Worksheet** is provided with the following disclaimer. The Appliqué estimates generated by the user are reasonable estimates of design areas and stitch counts based upon the values and suppositions provided by the user. The actual number of stitches and the area computations are generated as a result of the embroidery practices and application process. The processes by which the estimates are computed are the property of E-Z Stitches, Inc. The formulas are included in this software for the purpose of enhancing the value of the overall E-Z Estimator product.

The **Annual Salary Estimator** provides no guarantees as to the actual amount of compensation to be earned in the embroidery industry. This computation estimate is provided as a means of illustrating an individual's earning potential based upon parameters offered by the software and modifications entered by the individual. The Salary Estimator is based upon a complete work year of available hours.

The **Budget Projection Worksheet** allows an individual to enter, save, and retrieve preliminary financial information that is displayed in a "worksheet or spreadsheet" format. The worksheet provides no financial guarantees of financial earnings or expenses related to the user of the budget worksheet process. The worksheet receives data provided by the user and performs mathematical calculations on those values provided by the user

The **Business Reports and Documentation** included with the E-Z Estimator are representative documents that must be customized by the user to more fully represent their business policies, practices, and procedures. These documents are a model for an individual or company establishing applicable documentation.

No system is bulletproof! E-Z Estimator has provided a modest protection level of employer/employee validation. The disclaimer here is simple. Be judicious in protecting your data. We do not warrant this system foolproof for covert efforts to access your information.

EMAIL abilities have been verified to work with Microsoft Outlook and Outlook (both copy right names). If you use another email program, you may experience some incompatibilities of operation. We were unable to test all email application software.

Vendor catalog data must be "imported" into the E-Z Estimator system in a specific format. We make no guarantees as to the accuracy of the vendor data if formats and directions are not observed. Vendor data must be provided by your individual supplier(s).

Introduction

The eagerness of trying a new piece of software must be held in check for a few minutes longer. The setup of the user features is most important. **BEFORE** the setup, the most important item is "registering your software". When you fill in the company data on the Company Information Screen, email your information, you will receive a registration key and instructions that will allow you to Print and Save your estimates. **The initial registration code is FREE. Additional registration codes may be purchased for $45.00 each.** You may purchase more than one key – when you are ready to load your software on additional computers. Registration is done on the email process from the company screen.

Each of the screens of the software will be presented and explained. This is a user-friendly manual, and well worth the few minutes of your time, which ultimately will be most rewarding for you.

E-Z Stitches, Inc. is an Embroidery Company with much the same items and issues of any typical small to medium sized company. We undergo growth, slow times, and even get slammed with "a lot to do, and little time to do it". Management and planning are the two keys to production control. Staff members who are versatile and willing to contribute are essential parts of the equation. AND of course, good running equipment. Get to know your maintenance support person – aka Dan Dilley, Wayne Benton. It was during a "tear-it-down-oil-it-and-repair-it session" that Dan pronounced the quote presented in the Preface. We can only hope to make it Utopia with a little bit of luck and some well applied business management practices.

The E-Z Estimator provides you an additional tool in your "Garment Decorating" toolbox that assists you in shop management and customer satisfaction. **"How to Sell Decorated Apparel"** is a slide show presentation that will teach you the techniques and clues to making a successful career. The goals of this software were to be easy to use, fast to process, and very economical for the embroiderer. We have met these goals. This year the price of the software was lowered to accommodate those "Just Getting Started" in the decorating business.

It is suggested you bring up E-Z Estimator when you start your day, and minimize the task (top right-hand corner minus sign) and use it as needed throughout the day. It is always available for the instant "How Long" and "How Much" questions heard throughout the day.

Features and Benefits

You have purchased one of the industry's easiest tools for computing time and cost estimates. E-Z Estimator is by far the most economical of any software package performing these or similar tasks.

Packed with loads of new features, the E-Z Estimator 6.5 is the premiere embroidery production software on the market. The system includes:

E-Z Estimator 6.5 FEATURES	
• **Full Screen Print Quotation / Invoice Process and set-up parameters**	• **Full Heat Press Quotation / Invoice Process and set-up parameters**
• **BUY JUST THE MODULE(s) you need – Embroidery – Heat Press – Screen Print – Business Information – Stitch Estimator**	• **Heat Press has 4 transfer options incl. Die Sublimation**
• **Additional data in the Business Information Module**	• **Includes the "How to Sell Decorated Apparel" presentation**
• **Import full supplier catalogs for the heat and screen selection process**	• **Additional System Maintenance functions**
• **Estimate stitch count for lettering**	• **Charge for customer supplied goods**
• **New supplier table information**	• **Generate purchase orders**
• **Full documentation package**	• **Customer "taxable" option**
• **Modify / Delete catalog data as needed**	• **New order forms**
• **Money designation for any country**	• **Standard appearance for all quotes and invoices**
• **Price "by the thousand stitches" option**	• **Upgrade compatibility for all versions**

The following features of E-Z Estimator 5.5 are included as a reference list.

- **Graphics…. On each quote – including EMAIL!**
- **System security – password protection now standard.**

- **Email the quote to the client!! Including the graphic.**
- **Add your own products to the selection table.**

- **Due date added to quotes.**
- **Stitch and appliqué estimating**

- **Quote status and changes, open, invoiced, delete**
- **Now FIXED PRICE option added for user flexibility.**

- **Additional reports for production planning and status.**
- **Print a consolidated statement of a client's open invoices.**

- **Print a client's history of quotations and invoices.**
- **Add your own database information of designs and thumbnails.**

- **See open Production Quotes and Open Customer Quotes.**
- **Additional design company participation.**

- **Costing table by stitch count and quantity included.**
- **Import/Export from/to Excel…. Use it in your accounting sys.**

- **Special report for mobile embroidery.**
- **Full system documentation manual.**

- **Full production scheduling**
- **System backup capability**

- **Income estimator and budget projection spreadsheet.**
- **Production and financial reports standard**

- **Graphics stored on CD or your hard drive**
- **Customer database can be exported**

- **Business planning package included.**
- **System statistics**

- **New System Registration capability**
- **Individual customer discounts**

- **Design browser for all provided designs.**
- **Embroidery business forms included.**

Additional Features and Benefits of the Total E-Z Estimator System

Other FEATURES	BENEFIT
The E-Z Stitch Estimator	
FAST	Less time all computations on a single screen
E-Z To operate	Quick to learn and use
Computes in inches and metric values	Which are you used too?
Computes perimeter stitches	Don't forget the edges
Variable Density settings	User selectable
Variable Underlay settings	User selectable
Estimate lettering Capitals & lower case	Full use of alphabet settings
Includes « Special Characters »	Full ANSI keyboard images
NO size limitations	If you can sew it…. We can count it!
Used as input to the full E-Z Estimator modules	System compatibility
Appliqué Worksheet	
Variable shape selections	You pick the shape versatile
Stitch perimeter computations	No length formula computations by hand
Fabric selections	Preset appliqué fabrics and materials
Lettering computations	Preset values

Register Your Software

You have purchased a very useful production tool in estimating the amount of time and associated costs for completing a customer's order. E-Z Estimator is an economical value for all of its built-in features and benefits. The software has embedded security to minimize unauthorized users from obtaining inappropriate access and utilization. Since you are the lawful owner of E-Z Estimator, please register your software purchase. This will allow you to:

- Keep you apprised of new product line releases.
- Provide any undocumented technical upgrades (aka bug fixes!)
- Obtain technical support via email or phone.
- Suggest enhancements to make the software better.

Getting Started – VERY IMPORTANT

The initial paper that comes with the CD, suggests to:

1. Print and read this documentation
2. Double-click the SETUP command on the CD.
3. Register your software (see Company Information Screen)

The loading of the E-Z Estimator software is routine, it is self-extracting and loads with no problem onto your hard drive. An icon appears on your desktop, and you will have to REBOOT your system before clicking on the EZE icon.

After clicking the EZE icon, the main E-Z Estimator screen appears (Figure 1). See page 18, for instructions on "How to Register" your software.
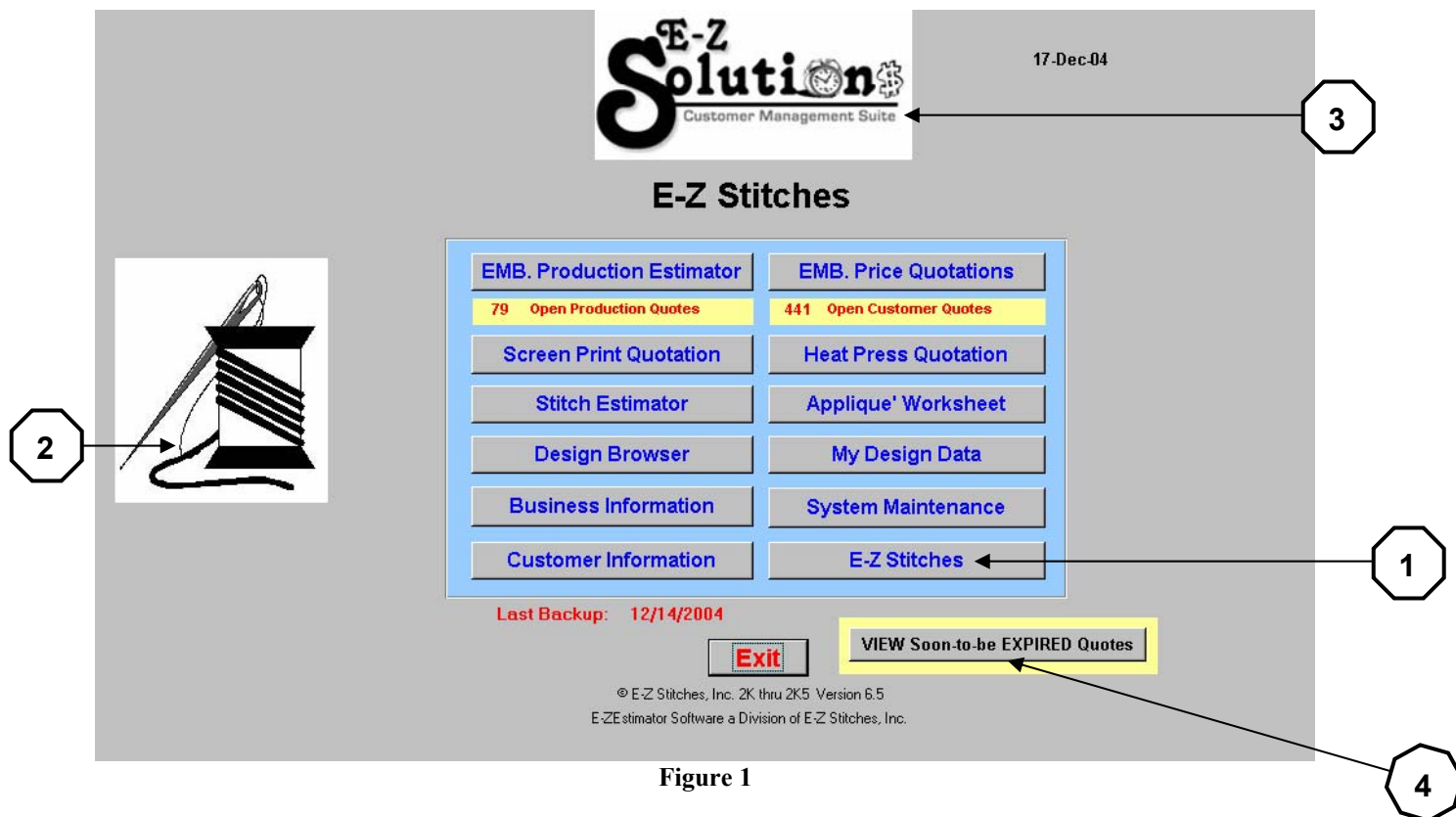
Figure 1

Throughout this documentation you will see a number in a hexagon with an arrow pointing to a particular item of interest. **The hexagon-number represents the corresponding paragraph number.**

The name "E-Z Stitches" and the E-Z Stitches logo are user fields that can be modified by following these instructions.

1. Click the "E-Z Stitches" button. This will become your company name button. When you see a reference to "company name", it means YOUR company name.

2. The E-Z Stitches logo may be replace with your own logo. Follow these instructions.

   a. Your logo must be a "jpg" file.
   b. Save your logo in a file on your hard drive named, "MyLogo.jpg" (no quote marks).
   c. Move your new file "MyLogo.jpg" into the directory "C:\Program Files\EZEstimator65". It will replace the current logo file (which is the E-Z Stitches logo).
   d. Exit and restart the software – you should see your logo.

3. Notice the "E-Z Solutions" title to the system. It is a "Customer Management Suite" for the business side of the garment decorating business. And the goal is to be E-Z to use.

4. The button "View Soon-to-expire-Quotes" appears when there are customer quotations that need your follow up with the customer. The button will not appear after you have reviewed the list. It may be printed for "hands on followup".

The next screen to appear is YOUR most important screen in the system. It allows you to specify several system variables used throughout the program. You may modify all of the data fields on this screen.

Figure 2

5. "Company Name" - Enter your company name in this field. The "Company Name" will appear on all screens and printed documents.

You may change this and all pertinent company information at this time, Click the SAVE RECORD button after changing any data.

6. The bracketed information is described in this section. The information included on this screen was used in the development of the software. You may modify it at any time. After changing any information in this section, the system will require you to "re-enter the E-Z Estimator" software. Click the EZE icon on the desk top, and continue.

- "Number of Heads" – How many sewing heads does your facility run at any time?

- "Usual Stitches per Minute" – What is the normal running speed of your equipment? Some jobs may require slower or faster speeds, and that will be taken into consideration later in the manual. Keep in mind; all data items are easily changed.

- "Usual Production Overhead" – this number refers to the amount of time it takes to "setup, hooping, teardown, trim, package, and prepare the finished goods to be delivered". The percentage factor of 30% appears to be a normal estimating factor, but it may change for the jobs that require an extensive amount of time to cleanup, or steam, or package a difficult job.

  - "Sales Tax" – Enter your state's sales tax percentage. It is used in the cost estimates. Have you overlooked including tax in your past estimates?

  - "Enter the Name of the Head Estimator" - Who normally prepares the estimates for your company? Enter the name or initials of the here. This will appear on all estimates.

  - "Registration Number" – on your screen this area will be a white box that will contain the registration key provided by E-Z Stitches. Go on-line to www.ezstitches.com and complete the E-Z Estimator registration form, and you will receive a registration key code that you will enter into this field. If you prefer, you may fill in the form in the rear of this manual, and fax it to E-Z Stitches at 301-253-9978.

  - "Product Markup" – What is your routine product markup percentage. When you add the cost of material to a quote, the system allows you to enter your costs, and automatically adds-in your percentage markup. On any printed reports or invoices, the customer ONLY sees the cost you normally charge. For example, if your markup is 150% on an item

that costs you $4.00, the printed reports will show the cost of goods at $6.00.

- "Pricing Options" – Does your company do more "retail" or "contract" embroidery? Make a selection. This has a bearing on the pricing table used on the cost estimate page. It may be changed at any time. This is a powerful feature and adds to the system versatility.

- If you are using graphics, this message will keep you apprised as to where your graphics (thumbnails) are stored in your system or on the CD. More on this later in the manual.

7. The Notes field appears for each customer record, you may enter any message about this customer. A **specific customer discount** has been added "by popular request". Locate the customer who is to receive the discount. In the Notes box, enter "**CUSDIS=.10=**" (no quotes) and the percentage you would like to provide this customer. i.e. .10 = 10%, .15 = 15%. You must use capital letters and the = signs. All quotes provided this customer will have a percentage discount applied to that customer.

8. The arrow buttons work much like the buttons on your VCR. The left button allows you to go backwards to find a customer record. The right button allows you to proceed forward in the customer file.

   a. To delete a customer record from the file, display the customer information on the screen, and then press the Delete Record button in Figure 2. Only the customer file information is deleted from the file. Time or price quotations created for this customer will remain in the quotations database.

   b. To add a new customer to the file, press Add Record, a blank screen will appear, enter the desired information, then press Save Record.

   c. To exit this screen and return to the main E-Z Estimator screen, press EXIT.

Figure 3

9. Does this customer have "Sales Tax" applied to the bill? Enter a check mark (mouse the box), and the system will retain that customer's data.

10. If you have to reach this customer, you may email from this screen.

11. This bracket identifies 5 functions of the system:
    a. What is the money denimation? This feature is set on the pricing screen.
    b. What is the pricing formula used? This feature is set on the pricing screen.
    c. If you have "Heat Press" processing, this button will be lit up for you to set the heat press parameters.
    d. If you have "Screen Printing" processing, this button will be lit up for you to set the screen print parameters.
    e. If you elect to view "Quotes soon to expire", enter the number of days AHEAD of the quote expiration date. IE, if you typically call to "nudge" your client that the quote may be expiring (for any of several reasons – garments may be unavailable after a certain date??), this will remind you via the button in the main screen. (NO 4)

12. If your customer supplies their own material, you now have an automatic option to charge a "User Supplied Surcharge". Enter your surcharge fee, and when the boxed is checked on the production screen, the fee will be computed for the quantity of items supplied.

NOTE: The information on the right half and middle of the screen is only visible when viewing your company record information. This portion of the screen will be blank for all other records in the system.

Register your software…. Be sure this screen contains all your pertinent information on the left side.

Figure 4

After completing your information, Press the "Register Your Software" button. This screen will appear.

The system will enter your CD serial number. You must complete the additional information. Check off which module(s) you purchased.   You may either; print the registration data and FAX it to us (301-253-9978) or you may email it to us.

You will receive the registration instructions and registration number for the module(s) you purchased within 24 hours after sending your information. If we have a question as to the correct registration number and/or module(s) purchased, we will contact you prior to sending you a registration number.

+ + + + + EMBROIDERY MODULE + + + + +
Production Estimator

The Production Estimator will produce time estimates based upon design parameters for a customer. You may view this screen from the main E-Z Estimator screen, or view it from the Production Quote screen when estimating time after computing a cost. When the "Production Estimator" button is pressed, the following screen appears:

Figure 5

1. The text "E-Z Stitches, Inc." will be your company if you entered the information in customer database.

2. The Company Name field may be a customer already on file, or you may enter the customer name without having it entered in the customer database. The advantage of having the customer information on file, allows you to view the "Contact Information" for that customer when an estimate is printed, and possibly faxed to the customer.

3. The Product type may be selected from the drop-down list. If the product is listed, you may enter a product name in this area. **HINT:** If you are supplying hats (or any garment) for the customer, select the item from the pull down list, then enter the catalog abbreviation and page number (i.e. ACC pg 7 style ABC – green). The additional information will be saved in the database for future reference when you look at the past quotations for this customer.

4. The Number of Stitches in the design is entered here.

   a. **OR** you may enter the Dakota Collectible design number selected from the catalog. **(see NO. 5 next).** If you enter the design number, the number of stitches, number of color changes, and the graphic of the design will automatically be displayed in the form.

   b. **OR you may enter a "?" (Without the quotes) to go directly to the STITCH ESTIMATOR WORKSHEET – to estimate the number of stitches in the design! See the section for "How to use the STITCH ESTIMATOR WORKSHEET.**

5. Select the design collection of your choice. Then enter the design number in the Number of Stitches box. You may then see the thumbnail graphic of that design.

6. Select a **"DUE DATE"** from the suggested list of when the order is to be ready for the customer. **You will need a DUE DATE if you want to save this information. It is used on the Production Report, for scheduling your workload.**
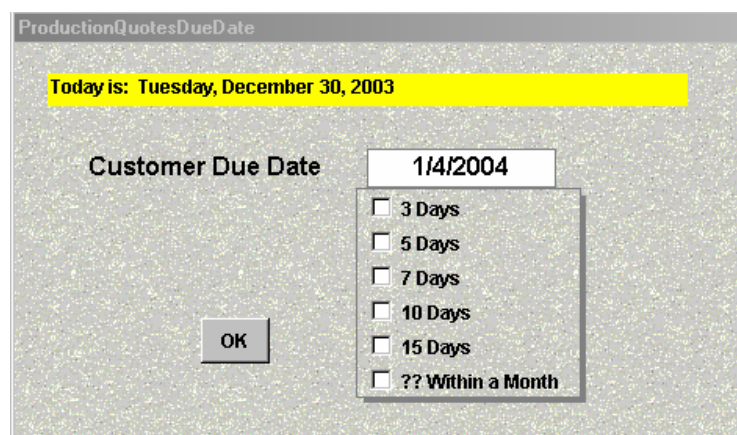
Figure 6

7. Note inside the text box. You also have the sewing colors sequence of the selected design. Now you can print this page and use it to set your colors, instead of dragging around a design book. Not all design companies have provided color sequences.

8. When you save a production quote, it will automatically save as an **OPEN quote**. You may close it or cancel it at your discretion. If you CLOSE the quote, it will not appear on your production reports. It will be retained for your overall information about this customer.

9. The Print Preview button is for your convenience. You can print a quote (or view it), at any time.

10. The graphic will print on all quotes, and emails. It will not print on any invoice. (There was no graphic used on this screen.)

11. The **ADD LETTERING** feature, allows you to estimate the stitch count of additional lettering that may be above or below a design. It will add the estimated stitch count to the design stitch count. **Be sure to FIRST bring in the design data, THEN add the lettering information.**

Figure 7

The information contained in the "Enter Production Data…" area is described as follows:

- Enter the Number of Pieces to be embroidered.- i.e. 3
- Enter the Number of Stitches in the design, i.e. 7762 (or in this case a Dakota Design was specified AL0562) and the stitch count and number of color changes were automatically filled in by the system, along with inserting the graphic on the quote.
- Enter the Number of Color Changes in the design – i.e. 3

At this point, the time calculations will automatically appear on the remainder of the screen. The calculations will be based upon the "pre-set parameters" from the initial customer screen. The following screen displays and explains a completed form entry for the Production Time Estimates screen.

Figure 8

- "Estimated Sewing Time (minutes) for 1" - Notice the first value 10:54 minutes to sew 1 sweatshirt. This estimate is used as a guideline if a sample sew-out is required prior to the production run.

- "Estimated Sewing time (hr:min) – Is computed at :13 minutes to sew this order.

- "Estimated Added Overhead (hr:min) – Is computed at :04 minutes of overhead, setup, teardown, trimming, etc.

- "TOTAL Estimated Sewing Time (hr:min) – Is computed at 0 hour and 16 minutes for the full 3 sweatshirts. With 4 heads working on this job, 1 production runs will be required.

- The estimator "Jim S." did not enter any job notes in the Notes box. Any information may be placed in the box.

- This estimate may be SAVEd and PRINTEd at any time during this process, simply press SAVE or PRINT. When an estimate is SAVEd, the customer name area on the form is colored gray

as a reminder that the estimate has been saved. If additional estimates must be computed for this customer, the "RESET THIS CUSTOMER" button will clear all values except the pre-set parameters.

- If any of the parameters must be modified, Place the cursor in the desired field to, change the value, i.e. change the value of 750 spm to 600 spm, click on Compute Estimate, and the new time estimates will appear. In this example of reducing the machine speed, will lengthen the amount of time to complete the order.

- If the customer has previously received a quote from you, and now would like to modify the quote (i.e. add more pieces to the total order), you may retrieve any past quote from the system (provided, of course, that you saved the quote). After the customer name is selected from the customer list, that customer's past Production Time Estimates may be viewed and retrieved by pressing the "Get Past Quotes" button. The following screen will appear.

Figure 9

By clicking a tile bar along this side will select a customer's prior estimate.

ID	Date on file	Customer Name	Product Name	Quantity	No. of Stitches	Prepared By
88		Zee Emb.	Robes	28	8500	
111	3/9/2002	Zee Emb.		28	28500	Tester 1
114	3/9/2002	Zee Emb.	Tote Bags	28	8500	Tester 1
121	3/9/2002	Zee Emb.	Fleece	28	8500	Tester 1
125	3/10/2002	Zee Emb.	Denim Shirt	28	18500	Tester 1
128	3/10/2002	Zee Emb.	Jacket	28	8500	Tester 1
185	4/19/2002	Zee Emb.	Fleece	51	2300	Jim S.
210	10/21/2003	Zee Emb.	Tote Bag	54	6543	=Jim S.
211	10/21/2003	Zee Emb.	Tote Bag	67	5432	=Jim S.
212	10/21/2003	Zee Emb.	Tote Bag	45	5454	=Jim S.
233	10/28/2003	Zee Emb.	Hats	28	8500	=Jim S.
236	11/10/2003	Zee Emb.	Polo shirt	4	6543	=Jim S.
237	11/15/2003	Zee Emb.	Sweatshirts	36	4568	=Jim S.
249	12/30/2003	Zee Emb.	Sweatshirts	3	7762	=Jim S.

Production Quotes
by Customer

= Open
- Closed

STATUS FEATURE>>>> Inside the vertical oval are an "=" sign and a "-" minus sign. These indicate the status of the quotation. = OPEN - CLOSED.
This screen displays information on previous quotes that will allow you to select the quote needed for review and adjustment by pressing the raised side button, i.e. the bar next to number 236 (shown by the arrow). The main Production Time Estimate screen will appear and contain the information from that prior quotation. (See next page.)

If there are no usable quotes on file, click on the upper left hand exit door and return to the main Production Time Estimate screen. No data will be displayed.

The information on this screen may be modified, saved, printed, and processed into the Price Estimator section of the system.

If you have completed a Production Time Estimate, and would like a Price Quote, you may press the "Price This Estimate" button and view a price estimate. Detailed information on the Price Quotation screen follows in the next section.

When you have completed this estimate, press the EXIT button to return to the Main E-Z Estimator selection screen.

Price Quotation

When you select the "Price Quotation" button on the main screen, the following screen is displayed.

Figure 10

The Company Name, Product, and Contact Information fields are the same fields in the Production Time screen. Select a customer from the database, or Add a New Customer, and that data is displayed in the Contact Information area.

This screen uses cost information from a Price Table (described in the next section) and pricing data supplied by you. The "Additional Costs" column is for your consideration of fees or amounts that apply to this customer. Each item on the screen is described below.

- **"No. of Pieces".** Enter the quantity of pieces that need to be priced. Note: the quantity that is entered in this box will also be displayed in the "Quantity" column price grid.

- **"Est. Stitch Count".** Enter the stitch count of the design. When you hit return or mouse to another box, notice the price is computed for the supplied information.

- **"Embroidery Cost Estimate".** Presents the cost of the order for embroidery.

- **"Unit Price".** Presents the unit piece price of the order for embroidery. We all have heard, "How much is that per piece?" It is included here. This value is originally selected in the "Customer information Screen". Each "Button" when clicked, will display a reminder message of how the unit price is computed for the order. You may vary this calculation at any time on this screen. When you leave this screen the originally selected "unit price indicator" will re-appear as a pre-set value.

- **"Total Price Estimate".** This is the price estimate for the complete order. This price changes each time you add values to the Pricing Grid. Notice – tax is automatically calculated in this price. Remember the tax percentage you loaded in your customer screen?

- **"Compute Estimate".** Manually computes an estimate, just in case you feel the need to compute the estimate again. Click the button.

- **"Print/Email".** Prints a copy of this estimate for your files, and / or your customer. The value of "Cost of Goods" will be an extended price, and the markup percentage will not be printed. This screen will appear:

Figure 11

- Check what percentage you prefer for this order deposit. The amount will appear below the percentage column.
- Check when the payment is due.
- **Check how long this quote is valid. When this is checked the buttons will become functional.**
- Select if the quote is printed on Company letterhead paper or plain paper.
- Select the number of copies to print.
- You may Preview the quote before Printing / Emailing.
- If you select email – be sure the quote data includes an email address.

- The quote will be an attachment to the email. You may enter a text message before sending the email.

To:	Jim Serritella
Cc:	
Bcc:	
Subject:	Embroidery Quote
Attach:	Contract Price Quotation - email.snp (13.0 KB)

Figure 12

- After Printing / Emailing – close this screen.

- **"Save".** Saves this information to the file for later retrieval, see "Get Past Quotes".

- **"Print Invoice/Statement".** Prints an invoice of this quotation. If multiple copies of the invoice are needed, click this button for each copy required.

- **"Statements"** may be printed at any time.

   o Select the customer from the customer pull down list.
   o Review past quotes from the selected customer. (Write the quote numbers down on paper – also be sure the quotes have been previously "invoiced". There will be a + sign in front of the estimator's name.) Any old quote can be "invoiced" by bringing up the quote, and clicking

"print invoice". The yellow box will display an invoice status and the + sign will be added to the stored quote.
- o Click Print Invoice/Statement button. This screen will appear. Enter the Invoice numbers i.e. In this case "99". Press OK after entering the Invoice number. If the Invoice does not belong to that customer, or is not on file (You may have written or entered the number incorrectly.), an error message will appear. **You may only consolidate 14 Invoices on a Statement.** When finished entering Invoice numbers, select paper, number of copies, Preview or Print the Statement. Then Close the screen.

Figure 13

- • **"Get Past Quotes".** To view a customer's past price quotes, select the customer from the dropdown list, click the "Get Past Quotes" button, and the screen will display all price quotations previously generated and saved for this customer. Select the desired quote, and it will populate the screen with the settings, and calculations of the original quotation.

- • **"Get Production Estimate".** To view the production time of this quotation, click "Get Production Estimate", and the next screen will be the Production Time Estimate of this price quotation. This button will be activated after a calculation has been completed for this quotation.

- • **"Price Options".** This selection button allows you the versatility to view the price of the order using "Retail", or "Contract" price tables. A new option is "Fixed Price". The Retail or Contract selection of

which option to use was made on your customer screen. You determined that your shop is primarily a retail or contract facility. If you happen to get a "contract" job, specify the quantity, stitches, etc, and then select the "Contract Button". The prices change automatically, as well as the screen title – "Custom or Contract" Price Quotation. You probably will "bounce back and forth between these two buttons" to see the power of this option.

- **"Fixed Price".** There are some jobs that need to be priced by the dollar amount. i.e. Put a monogram on a towel - $8.00 please. Select "Fixed Price", enter 8.00 in the "cost of goods" box, which will change to Fixed Price., and continue pricing the job. This option is great for Karate belts, establishing your "Minimum Charge" per job, or even using the E-Z Estimator to get an "about price", and then rounding it off to a fixed price.

Additional Costs		Unit Price
Extra Personalization:		
100.00%	Fixed Price:	$8.00

Figure 14

- **"Notes".** This box contains the information from the Production Screen, and the Due Date. If you want to add more information in the box, mouse here and enter data.

- **"Quote Number".** This is a sequential number that will also be used as an Invoice Number. It cannot be reset to 001 or any other number. It is system generated.

The Price Grid ….

- **"Extra Personalization".** The order may have required a left logo and a right chest name. The stitch count should have included both sewing fields. The costs were computed only on the values supplied in the "Est. Stitch Count" box. How much do you charge for the additional right chest personalization? Enter that amount under "Unit Price". The "Extended Amount" will be computed and the "Total Price Estimate" will be re-calculated. The "Extra Personalization" applies to any other sewing charges, i.e. extra apparel placements, back or sides of hats, etc. If the original order was 24 pieces and you only have to personalize 10 pieces, you can change the quantity to 10. (Remember, the system automatically puts the "No. of Pieces" in the quantity column – you can change that with no problem.)

- **"Cost of Goods".** Enter your cost of the material. The "Mark Up Percentage" (from your customer screen), will be applied to the "Cost of Goods" price, multiplied by the "Quantity", and presented in the "Extended Amount" column. The Total Price Estimate is re-calculated. If you prefer to change the "Markup Percentage" on this screen for this estimate, Place the cursor in this field and highlight the current percentage, change the number to the desired amount, and click "Compute Estimate", all totals re-calculate.

- **"Additional Hooping".** Do you charge extra for those very difficult pieces, i.e. tennis racket covers? If you have an extra hooping charge, enter it here. Other options under Additional Hooping include:
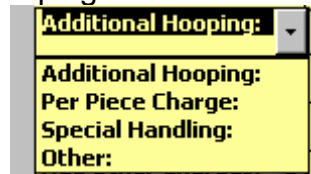
Figure 15

- **"Delivery / Shipping".** Enter the dollar amount here. Additional options under Delivery / Shipping include:

Figure 16

- **"Digitizing Costs".** Enter the fee for digitizing this sew-out design here. More options for Digitizing Costs are:
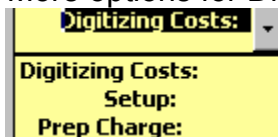
Figure 17

- **"Add Other Charges".** What else do you charge? Packaging, special wrapping, additional labeling, this is a catchall dollar amount that will be added into the total price. Including:
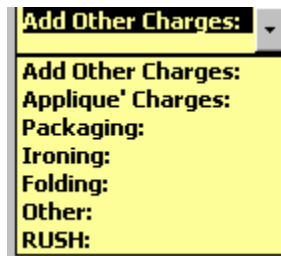
Figure 18

- **"Less Cash Credits".** Would you like to give this customer a dollar amount discount? i.e. Take $50.00 off the total price. Enter the dollar amount here. DO NOT enter a preceding minus sign (-), the system knows this is a subtraction amount.

- **"Less Discount %age".** Do you provide 10% off large orders? Or give special customers 15% off?   Enter a discount percentage here. Enter only the number, not the percentage sign.

- **"State Tax Rate".** This is a preset value from your customer screen. If you prefer not to charge this customer a sales tax, change the value on this quote to 0 and the tax will not be applied. The preset value will reappear when you re-enter this screen from the main E-Z Estimator screen. The method of computing tax is pre-set in the "Customer Information Screen". Select the appropriate tax formula for your area.

- At the bottom of the screen is the indicator that a graphic image is available to be printed on the quote or email.

Pricing Data

Some embroiderers used FBTSOYP pricing, some use a matrix grid (like a city-to-city mileage chart), some have a little formula known only to them and the guru who helped design it, and yet some, don't have a clue how to price a multiple quantity order. Do not feel lonely! This program was written for a company who needed real help. AND they love it now. Bring on the pricing monster, we can do that. (oh – FBTSOYP = Fly by the seat of your pants).   The object of all businesses is to be reasonably profitable, and there are several keys to that end – the key addressed here is the pricing table.

There are two methods of pricing provided in this E-Z Estimator. There is the traditional pricing grid, by quantity, by stitch count, by commercial / wholesale. And the new feature added is the price per thousand stitches. You select which method best fits your style of doing business. Keep in the mind the objective – be reasonably profitable.

If you as the embroiderer do not know how to generate the prices that you see in the table, you have a couple of options. This is a very powerful tool with great flexibility.

- Use the figures in the table – they are reasonably competitive and you will make a profit on any job.

- If you feel the dollar amounts in the table are too low, change the numbers. All dollar amounts may be changed.

- If you feel the quantity price breaks are not to your liking, change the numbers. Set your own price break limits.

- If you need assistance in setting these prices, refer to an accountant or financial expert.

Here is an important point of this program.   It performs proportional price estimating – totaling in the embroiderer's favor!

What is proportional price estimating? As you enter the stitch count to be used in the estimate, the value of the estimate uses the base number from the quantity/stitch intersection. For example, if you enter 3000 stitches to be sewn and 55 pieces as the quantity, the price you will see on the RETAIL chart is $3.75. If you enter 3500 stitches on the chart for 55 items, the amount changes to $3.85 per item. It has been the practice of embroidery estimating to forget a few hundred stitches in the computation. The system does the work and computes the complete estimate for you. The system estimates are based upon the dollar amounts provided by you in the Price Data Maintenance Table. When (or if) you modify the table, do not forget to save your work after changing the dollar amounts or quantity "less than" numbers.

The Price Table screen image is included as Figure 10. The description of the Price Table is as follows: The form is designed after observing contract embroidery price tables, with quantity indicators for number of pieces and stitch counts. It is an easy form to use and allows you to set your own prices. The top row is the number of pieces and the next 7 rows are for stitch estimates and costs. The quantity row with the "+" sign is the "add-on" row for sew-outs over 12999 stitches per item. Any stitch quantity over 12000 will be included in the computed estimate.

How many items must be sewn? - The number in the top row is a "less than number" - the number of garments to sew is less than the quantity in the top row of each column. For example, if there are 20 items to sew, use the prices in column 3 based on the stitch count range in column 1. On the form the individual columns represent:

- Column 2 is 1 to 12 items (or in computer-ese less than 13 items)
- Column 3 is 13 to 24 (less than 25 items)
- Column 4 is 25 to 72 (less than 73 items)
- Column 5 is 73 to 144 (less than 145 items)
- Column 6 is 145 to 250 (less than 251 items)
- Column 7 is for 251 items or more. (I inserted 25,000 as a top figure, if you need more than the number 25,000 it may be changed by you).

How many stitches are there in the item to be sewn? - The number range is in thousand increments, i.e. 2000 - 2999. If there were 3500 stitches in the item to sew, the fee would be the number where the quantity and stitches intersect. Think of the city-to-city mileage chart, match the stitch range with the item count range and get a base number for cost estimating.

The numbers in the top row may be changed to your quantity range specifications, AND the dollar value amounts may be modified per your fee schedule. If you currently do not have a fee schedule, you may want to test the system to determine your best quantity-to-stitch count fee schedule.

You cannot add any additional columns or rows. There should be sufficient space for about 99% of the contract embroidery facilities. Of course, there will be companies that need more stitch/quantity options. That is an item for future consideration.

    The following page is a screen image of a portion of the Pricing Table.

- General reminder text appears on the screen each time the table is accessed.
- "C" or "R" (under the "EXIT Button) indicates "Contract" or "Retail" prices (R section not shown)
- Quantities in column 1 CAN NOT be changed
- All other numbers CAN be modified by you
- "X" the end of the pricing table

You may change any value in columns 2 through 7.
Be sure to SAVE your work after changing any values in the table.

Print | SAVE | Exit

Identified Currency:

U.S. Dollars

☑ Use Price Matrix
☐ Use Price / Thousand

Select Pricing Option - Use the pricing grid matrix OR
Enter a rate per thousand stitches.

	Stitch Count	2	3	4	5	6	7
	Quantity Less Than >>	13	25	73	145	251	25000
C	2000	2.4	2.25	2	1.9	1.45	1
C	3000	2.5	2.45	2.3	2	1.9	1.1
C	4000	2.6	2.5	2.4	2.3	2.2	1.2
C	5000	2.7	2.6	2.5	2.4	2.3	1.3
C	6000	2.8	2.7	2.6	2.5	2.4	1.4
C	7000	2.9	2.8	2.7	2.6	2.5	1.5
C	8000	3.1	2.9	2.8	2.7	2.6	1.6
C	9000	3.3	3.1	2.9	2.8	2.7	1.7
C	10000	3.5	3.2	3	2.9	2.8	1.8
C	11000	3.6	3.4	3.2	3	2.9	1.9
C	12000	3.75	3.6	3.4	3.2	3	2
C	12000+	0.1	0.09	0.08	0.07	0.06	0.05
R	2000	4.75	4.5	3.5	3.2	2.9	1.4
R	3000	5	4.25	3.75	3.45	3.2	1.7

Figure 19

This screen is accessed from the "System Maintenance" screen. It is a protected screen if security is enabled.

Enter the currency name in the colored box. All currency name boxes are this color and will be below any currency quotation.

If "Price per Thousand" is checked, another box will appear to enter the amount per thousand.

BE SURE TO SAVE YOUR changes to this screen.

Embroidery Stitch Worksheet

Welcome to the E-Z Stitch Estimator! This software will easily and quickly provide you with a basic estimate for any **design** provided by your customers. With a little knowledge of estimating (and visualizing) an **area** for a design, you will be developing estimates immediately. A quick pass of this chapter and you'll be a pro in the "I think there are ____ stitches in this design"! **Alphabet** and **special character** stitch counts can be estimated using this software.

This estimator computes values for the following:

- Design selection
- Measurement type - Inches or Millimeters
- Density selection
- Underlay selection
- Edge or Boarder Stitching
- Alphabet estimates – using upper and lower case letters
- Special characters – including the full ASCII character set
- Fully integrated with the Original E-Z Estimator for computing Production Time Estimates, and Price Quotations based upon stitch count and number of items to be sewn. It provides a "Digitizing Estimate" based upon the dollar amount specified in the Customer Information screen.
- The worksheet may be printed

The screen "walks you thru" the sections of this estimator. Follow the black and yellow headers, and reply as needed.

As in the other sections of this manual, screen images are included for this presentation. The Embroidery Stitch Worksheet can be accessed by the use of a **"?"** (question mark without the double quotes) in the "Stitch Count" area of the Production Estimator form, or it may be entered directly from the initial E-Z Estimator screen bar.

The Embroidery Stitch Worksheet appears as follows:

Figure 20

When this screen appears the "Design Shape" is black and yellow. As you progress through the form, each succeeding area is highlighted in black and yellow. As in the past on previous forms, hexagon numbers and arrows will identify specific information blocks. Data is entered in the yellow boxes and stitch estimates appear in the blue boxes.

1. Define the shape of the object being estimated. Only one selection button may be highlighted.   If the image does not have a predefined shape, you may want to photocopy the image, and draw either a rectangle, square, or circle around the image.

2. Click the measurement selection button for either "inches" or "metrics".

3. Enter the measurements of the shape you selected. These may be in inches or millimeters.

4. Does your image require a border or edge stitching? If so, enter the percentage of the type of stitch you may use for the border sewing. Usually, the border is a full 1. = 100% (if boarder a single time, or 3. = 300% if the border is sewn over three times.

5. If a border is not needed, tab over or mouse over to the stitch selection for the majority of the design. Ask yourself this question for each stitch selection. How much space in the design uses this type of stitch? Enter the percentage for that type of stitch. I.e. .95 = 95%, .75 = 75% the decimal is needed for this number. Continue entering percentage values for each of the 3 types of stitches.

6. "BLANK SPACE" – The percentage value entered will be used to finalize the design computation. This box is the "compute button" for this design estimator. If the entire design is covered with stitches, i.e. you have a rectangle to estimate with a logo inside the rectangle, the BLANK SPACE is zero, and the estimator will compute a full rectangle stitch value. Mouse, or tab to this field, enter a value, or TAB out of the box, and a stitch estimate is computed and appears in the Design and Lettering Stitch Estimating box.

An example of the above description is as follows:

Figure 21

7. To obtain Alphabet or special character stitch estimates, click your mouse in the Lettering box and type what must be estimated. Use upper and lower case letters as required by the customer. Do not be concerned about spaces, only the lettering and the special characters will be used for the estimate calculation.

8. Select the type of measurement, and size of the letters. For example, select inches, .4 (for letter height of almost one half inch), Will the lettering have any edge stitching, if so select the type of stitches used, and you're finished!

9. The lettering stitch count will be added to the design stitch. The total stitch count and legend will be placed in the center of the screen.

This stitch estimator may be revised as many times as you see appropriate in developing a best guess estimate. Any item on this screen may be changed as often as you prefer. There is a "RESET" button, which clears the workspace and allow you to begin anew in developing an estimate.

The **Density** selection buttons allows you to specify the amount of density that should be included for this job. Select the button, and the calculation is automatic.

The **Underlay** selection buttons allows you to specify the amount of underlay that should be included for this job. Select the button, and the calculation is automatic.

The completed worksheet may be printed for your files. The final numbers computed by the E-Z Stitch Estimator can be input to the Price Quotation estimating module, which, in-turn can be "clicked into" the Production Estimating screen. Both of those modules allow the data to be **"SAVED"** for later reference or retrieval of customer information.

Appliqué Worksheet

The Appliqué Worksheet was developed to meet the requests of those individuals using Appliqué in their garment decorating activities. This worksheet is fashioned on much the same principle as the Embroidery Stitch Worksheet. Below is the screen image of the Appliqué Worksheet. Each data item will be described in the following text.

Figure 22

1. Quantity – Enter the number of appliqué pieces that must be sewn. This is set to multiples of 5. The program will make the adjustment to a value of 5 and provide you a reminder notice.

2. Tier Level – Up to three tiers, or sewing layers, are estimated. You must proceed in order of each tier.

3. Shape – Four shapes are provided for the worksheet. Use your best judgment in determining an appropriate shape. If you select "Lettering" – an open area will be displayed for the lettering to be appliquéd. Enter the text of what is to be sewn.

4. Dimensions – Based upon the shape selected, the Dimension box will display input parameters. All values are specified in inches.

5. Edge Stitching - This selection determines the perimeter stitch count.

6. Material – Check the material type used for this tier.

7. As values are entered in the upper portion of the form, calculations are performed and displayed in the 3-tier grid. You may change the value of any item while on the same tier. You may not regress to a prior tier in developing this worksheet.

8. Clicking the RESET button will clear all tier entries and new information may be entered into the worksheet.

9. The Unit Cost field may be changed by the user to reflect the cost of the Appliqué. After changing the Unit Cost data, the program re-computes all values.

Below is an example of a completed Worksheet to include lettering on the Tier 2 sew portion. The Worksheet may be printed for later reference, and then the key information will be used as input to the Cost Production Estimate screen. Any notes entered here will appear on the printout – the notes will note be saved to the file. The Total Estimated Appliqué Costs are included on this Worksheet and transferred to the Cost Production Estimate screen.

Figure 23

+ + + + + HEAT PRESS MODULE + + + + +
Heat Press Set Up

Before you can use the Heat Press production screen to meets your needs, you must establish the "Set Up Parameters". The Set Up screen button is identified in Figure 24. The actual set up screen image is presented below.

Figure 24

Each data element is self explanatory. The description will be presented by specific areas:

1. Markup Percentages – What percentage do you markup each of the four categories?

2. How much is your cost of Lettering by size of letters? Each amount may be modified as per your supplier's rate.

3. How much time is needed to "Heat Apply" the decoration to the item? What is the Overhead to apply to the time and dollar computations? Don't forget to charge for the INBOUND freight charges – it's usually added to the price on a per-piece amount. And, what amount do you want to charge for "Customer Supplied Material"?

4. What is the cost of Heat Transfer and Die sublimation paper?

5. How much is your hourly rate? This is a versatile computation box to illustrate amounts, percentages, and setup fees.

6. The Markup Option allows you to view these values on the Heat Press production screen. Regardless of you choice in this box – you can toggle "viewing/non-viewing" directly from the production screen. Occasionally, a customer may "watch over your shoulder" as you build his price quote – you sure do not want him viewing YOUR Production overhead values. Remember the word "AMOUNT" and the letter "O". Mouse and click at the center of the "O" and the setup parameters appear and disappear from the screen.

There are different schools of thought in establishing these percentages and values. The most important business consideration is "Are you making any money providing Heat Press Services"? You need to be aware of all your expenses, establish a production value per hour, or per job, and target your pricing to obtain those amounts. Item #5 "Cost per hour" will help you determine you overall hourly production rate. The most important customer consideration is "Am I providing good quality garments and services for my customer." There is a reasonable amount that meets both requirements.

Pricing is not only a delicate computation, but two important factors in establishing all prices are:

- Local competition – How many other companies produce heat applied products?

- Community demographics – Are your clients capable of buying your goods for the price you charge.

This set up screen will make your price estimating well worth the value of the E-Z Estimator software. You will produce, fast, accurate, credible, and professional looking quotations, (and Invoices).

Heat Press Estimates

Heat Press Estimates can be accomplished with minimal effort by following a couple of basic steps.   Be logical in moving around the screen, and remember decoration placement and due date. The system will remind you of any missing items needed for a quote. The quote process will be quickly and professionally completed based upon the parameters you entered earlier on the set up screen.

The Heat Press screen image and data field description is as follows:

Figure 25

1. **The Heat Press green section** of the screen is organized to select or enter a customer, select the material (or check "Customer's Material"), select a price, and enter a quantity by identified sizes of the products. If you are not selecting an item from a pre-stored catalog, check "Imprintable Item" and enter the description in the Description area.

2. **The Size, Quantity, and Cost** area of the screen is filled in by the selection of the material from the product catalog. If the garment has only 3 sizes available, then only those sizes and costs will appear in the boxes. ALL prices shown are fully burdened with overhead, and in bound freight fees. Additional charges are applied by specific category.

3. **Lettering** is computed based upon letter size, number of levels (or layers), how many set of lettering, and what specific words, phrases, or letter combination are required to complete this order. The letter vendor name must also be entered. The letter summary will appear in the NOTES box. To obtain the letter summary, enter the required letters, then press "Get Letter Summary". The cost of lettering is presented in the Summary.

4. **Die-Cut Material** is computed based upon quantity of die-cuts, their measurements and number of layers. You must enter the supplier's name. The amount is computed and stored in the Summary.

5. **Transfers** are identified as outside purchases, quantity, cost, and vendor; OR transfers that are printed "inhouse" on either type of transfer paper. The total cost of Transfers are included in the Summary.

6. **Do not forget....** To select and enter a due date for the job, and where on the garment the decorations or personalization should be placed.

7. **Another "button" not to forget….. the secret "O"**, you may need to read the setup screen information again.

======== items not numbered on the screen shot ==========

"Get Past Quotes". To view a customer's past price quotes, select the customer from the dropdown list, click the "Get Past Quotes" button, and the screen will display all price quotations previously generated and saved for this customer. Select the desired quote, and it will populate the screen with the settings, and calculations of the original quotation.

"Notes". This box contains the information from the Production Screen, and the Due Date. If you want to add more information in the box, mouse here and enter data.

"Quote Number". This is a sequential number that will also be used as an Invoice Number. It cannot be reset to 001 or any other number. It is system generated.

"Less Discount %age". Do you provide 10% off large orders? Or give special customers 15% off? Enter a discount percentage here. Enter only the number, not the percentage sign.

"State Tax Rate". This is a preset value from your customer screen. If you prefer not to charge this customer a sales tax, change the value on this quote to 0 and the tax will not be applied. The preset value will reappear when you re-enter this screen from the main E-Z Estimator screen. The method of computing tax is pre-set in the "Customer Information Screen". Select the appropriate tax formula for your area.

+ + + + + SCREEN PRINTING MODULE + + + + +
Screen Printing Set Up

Before you can use the Screen Printing production screen to meets your needs, you must establish the "Set Up Parameters". The Set Up screen button is identified in Figure 26. The actual set up screen image is presented below.

Figure 26

Each data element is self explanatory. The description will be presented by specific areas:

7. Screen Print Fees – Enter the amount you charge for each category. These amounts are used in the production screen computations.

8. Markup Percentages – What percentage do you markup each of the two categories? What is the Overhead to apply to the time and dollar computations?

9. How much time is needed to "Screen" the decoration to the item? The screen print time and the tear down/clean up time are used to compute overall production time.

10. Don't forget to charge for the INBOUND freight charges – it's usually added to the price on a per-piece amount. And, what amount do you want to charge for "Customer Supplied Material"?

11. How much is your hourly rate? This is a versatile computation box to illustrate amounts, percentages, and setup fees.

12. The Markup Option allows you to view these values on the Screen Print production screen. Regardless of you choice in this box – you can toggle "viewing/non-viewing" directly from the production screen. Occasionally, a customer may "watch over your shoulder" as you build his price quote – you surly do not want him viewing YOUR Production overhead values. Remember the word "AMOUNT" and the letter "O". Mouse and click at the center of the "O" and the setup parameters appear and disappear from the screen.

There are different schools of thought in establishing these percentages and values. The most important business consideration is "Are you making any money providing Screen Printing Services"? You need to be aware of all your expenses, establish a production value per hour, or per job, and target your pricing to obtain those amounts. Item #5 "Cost per hour" will help you determine you overall hourly production rate. The most important customer consideration is "Am I providing good quality garments and services for my customer."   There is a reasonable amount that meets both requirements.

Pricing is not only a delicate computation, but two important factors in establishing all prices are:

- Local competition – How many other companies produce screen printed products?

- Community demographics – Are your clients capable of buying your goods for the price you charge.

This set up screen will make your price estimating well worth the value of the E-Z Estimator software. You will produce, fast, accurate, credible, and professional looking quotations, (and Invoices).

Screen Printing Estimates

Screen Printing Estimates can be accomplished with minimal effort by following a couple of basic steps. Be logical in moving around the screen, and remember decoration placement and due date. The system will remind you of any missing items needed for a quote. The quote process will be quickly and professionally completed based upon the parameters you entered earlier on the set up screen.

The Screen Printing screen image and data field description is as follows:

Figure 27

8. **The Screen Print green section** of the screen is organized to select or enter a customer, select the material (or check "Customer's Material"), select a price, and enter a quantity by identified sizes of the products. If you are not selecting an item from a pre-stored catalog, check "Imprintable Item" and enter the description in the Description area.

9. **The Size, Quantity, and Cost** area of the screen is filled in by the selection of the material from the product catalog. If the garment has only 3 sizes available, then only those sizes and costs will appear in the boxes. ALL prices shown are fully burdened with overhead, and in bound freight fees. Additional charges are applied by specific category.

10. **Screen Printing Fees -** Service charges that were preset are displayed and used here.

11. **Do not forget….** To select and enter a due date for the job, and where on the garment the decorations or personalization should be placed.

12. **Another "button" not to forget….. the secret "O"**, you may need to read the setup screen information again.

======== items not numbered on the screen shot ==========

Get Past Quotes". To view a customer's past price quotes, select the customer from the dropdown list, click the "Get Past Quotes" button, and the screen will display all price quotations previously generated and saved for this customer. Select the desired quote, and it will populate the screen with the settings, and calculations of the original quotation.

"Notes". This box contains the information from the Production Screen, and the Due Date. If you want to add more information in the box, mouse here and enter data.

"Quote Number". This is a sequential number that will also be used as an Invoice Number. It cannot be reset to 001 or any other number. It is system generated.

"Less Discount %age". Do you provide 10% off large orders? Or give special customers 15% off? Enter a discount percentage here. Enter only the number, not the percentage sign.

"State Tax Rate". This is a preset value from your customer screen. If you prefer not to charge this customer a sales tax, change the value on this quote to 0 and the tax will not be applied. The preset value will reappear when you re-enter this screen from the main E-Z Estimator screen. The method of computing tax is pre-set in the "Customer Information Screen". Select the appropriate tax formula for your area.

The Business Plan Package

The Business Plan Package includes two financial calculators, and five documents that must be customized to the company specifics. This material can be used to provide supporting corporate documentation for customer relations, company presentations, or company personnel packages. Both the financial segments and the documents will be described in this section of the E-Z Estimator documentation. The selection screen is the input to the Business Plan Package.
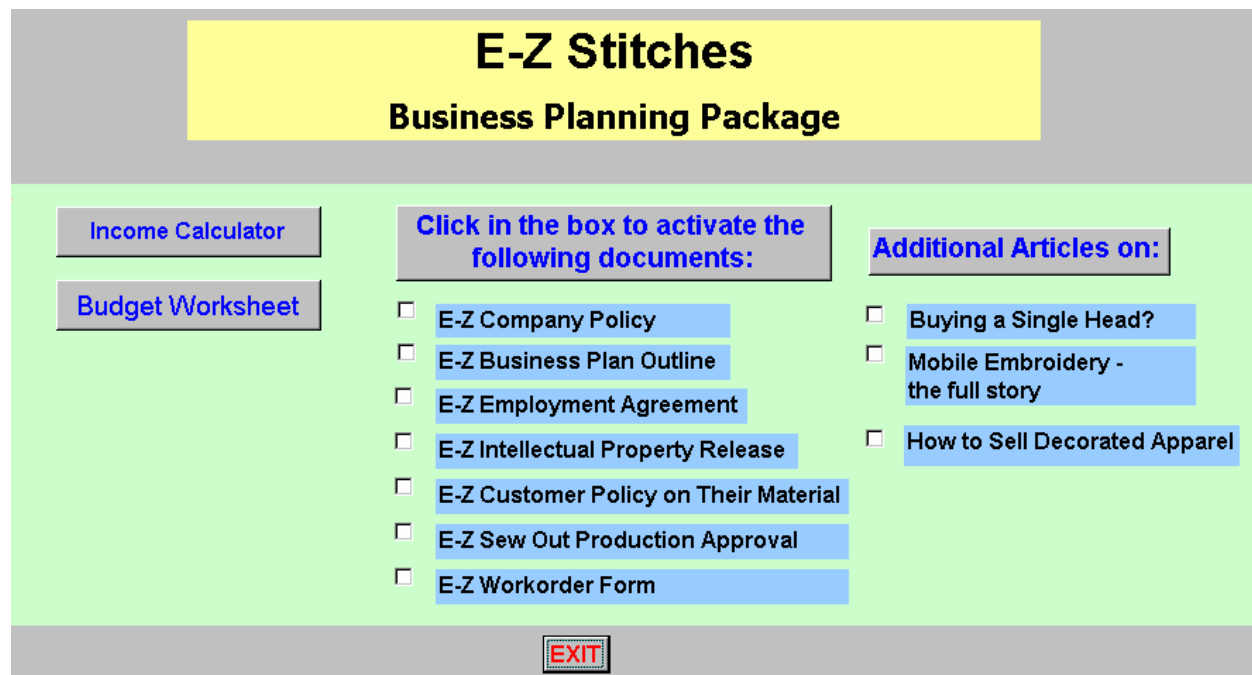
Figure 28

Income Calculator

So often in the business world a fledging individual or novice company needs the advice and mentoring of a more experienced advisor. This portion of the E-Z Estimator was prepared to assist embroiderers in computing some very basic financial data, as well as present templates of documents that are used in an embroidery business.

The Annual Income Calculator presents the financial potential to earn money in the embroidery industry. It is a tool that may be used as a guideline to accomplish your personal and business goals. **THERE ARE NO GUARANTEES OR IMPLIED ADVANTAGES OF THIS CALCULATOR**.

By entering the desired annual income you would like to attain, the Annual Income Calculator presents the Monthly, Weekly and Daily income values using a per piece fee of a specified dollar amount. The software is keyed to begin at $5.00 per piece, and presents the number of pieces per day the embroiderer would need to sew on a 5 day per week schedule. The user may change the $5.00 per tem amount to any dollar value.

This worksheet may be printed. It also can be used as input to the Budget Projection Worksheet.

The "RESET " button clears the values from the screen and allows the user to enter new information in the Annual Income field.

The Income Calculator screen presents the income breakdown for a $35,000 per year worksheet.

Figure 29

The user may print this page or this information may be used in the Budget Projection process. The RESET button will clear all calculations and the user may create additional income scenarios.

The Budget Projection Worksheet

This unique tool was developed for the novice embroiderer – or those contemplating the embroidery profession. **IT IS NOT A FULL ACCOUNTING SPREADSHEET. IT IS – A WORKING TOOL TO HELP PRESENT FINANCIAL TOPICS AND AMOUNTS THAT REQUIRE ANY BUSINESS DECISION CONSIDERATION**.

When the user selects the Budget Projection Worksheet, the initial screen appears to remind the user to enter a beginning month for the computations, OR retrieve the last worksheet saved by the individual. When the user acknowledges "OK", the Budget Projection Worksheet appears, and the user clicks either the beginning month field, or the Retrieve button.

If the user selected the Budget Projection Worksheet from the Annual Income Calculator, then the Estimated Monthly Income legend and amount are presented on the screen. If the user selected the Budget Projection Worksheet from the Business Plan Package main screen, the screen does not show those fields.

The following screen displays the Budget Projection Worksheet using the $35,000 Income Calculator Worksheet data. The worksheet tallied the estimated income at $33,177.

BUDGET PROJECTIONS WORKSHEET
As Of   30-Dec-02

Estimated Monthly Income
$2,917

Income:		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Embroidery		1,458	1,750	2,042	2,333	2,625	2,917	2,917	2,917	2,917	2,917	2,917	2,917	$30,625
Digitizing		73	88	102	117	131	292	292	292	292	292	292	292	$2,552
Total Income		1,531	1,838	2,144	2,450	2,756	3,208	3,208	3,208	3,208	3,208	3,208	3,208	$33,177

Expenses:														
Taxes		306	368	429	490	551	642	642	642	642	642	642	642	$6,635
Rent		321	321	321	321	321	321	321	321	321	321	321	321	$3,850
Insurance		200	200	200	200	200	200	200	200	200	200	200	200	$2,400
Communications		50	50	50	50	50	50	50	50	50	50	50	50	$600
Advertising		65	65	65	65	65	65	65	65	65	65	65	65	$780
Supplies		75	75	75	75	75	75	75	75	75	75	75	75	$900
Machine Lease		0	0	0	0	0	0	0	0	0	0	0	0	$0
Cost of Goods		0	0	0	0	0	0	0	0	0	0	0	0	$0
Other		0	0	0	0	0	0	0	0	0	0	0	0	$0
Total Est. Expenses:		1,017	1,078	1,140	1,201	1,262	1,353	1,353	1,353	1,353	1,353	1,353	1,353	$15,165
Total Net Income:		514	759	1,004	1,249	1,494	1,856	1,856	1,856	1,856	1,856	1,856	1,856	$18,012

Export Excel Record | Retrieve Last Worksheet | Save Worksheet | Compute Worksheet | Print this Worksheet | Exit

Figure 30

This screen will be further described in the following paragraphs.

1. When this screen is opened, the user must select the beginning month of the worksheet. In the above example, January was selected, and the month headers displayed the next eleven months. Any month may be selected for display.

2. All total lines are re-calculated EVERYTIME a dollar amount is changed and the enter button is depressed or the mouse is moved away from a dollar cell. The user may not alter the total lines and column.

3. (No arrow shown) – All income or expense dollar values are entered in dollar amounts only. Do not use any decimal cent numbers. The least value necessary in any cell is the number zero "0" (no quote marks).

4. The Income or Expense category descriptions may be changed by the pull-down menu selection, or a new description may be added by typing over any line description. Highlight the description (click on it), and enter in the new text.

5. The control buttons at the bottom of the screen include:

   a. Export Excel Record – An Excel file is written to C:\Program Files\E-Z Estimator65\BudgetProjectionWorksheetData.xls   This will be single entry in Excel format. The user must then move the data into a layout to their individual preferences.

   b. Retrieve the Last Worksheet – When the SAVE button is depressed, the data in the worksheet is saved for later use. The data is retrieved for additional adjustments or calculations. **ONLY THE LAST SAVED WORKSHEET DATA CAN BE RETRIEVED**. No prior data worksheets are retained.

   c. Save Worksheet – See "B" above.

   d. Compute the Worksheet – It's just there – in case you wanted to compute the values again!

   e. Print this worksheet – Prints the worksheet in wide format.

   f. EXIT – Ends this program.

Available Documents

The E-Z Estimator has seven documents that must be customized by your company. All documents are Word documents that are saved on your hard drive (C:\Program Files\EZEstimator65\documentname.doc) root directory. It is suggested to produce the document, print it, and make adjustments as needed. There are two business reports which are PDF files for purchasing a single head unit and an article on mobile embroidery. A brief descriptions of these documents are as follows:

1. **E-Z Company Policy** – An extensive manual for management and staff describing the company policies. Corporate management must reflect the company's position on each topic and must customize this manual. Most topics may be accepted as written, but other topics will need to be sanitized based upon the executive concept and position.

2. **E-Z Business Plan Outline** – This Business Plan is written in the form of a loan request.   The boiler plate information should be customized itemizing the company posture on this document.

3. **E-Z Employment Agreement** – An employment agreement is necessary for key members of your company. Most general staff employees would not usually have signed a document of this nature, but you have to be the judge on weather you should require this as a company policy. It is a legal document, that probably should be reviewed by your company attorney and customized to meet your state requirements for such a document.

4. **E-Z Intellectual Property Release** – When signed by your customer, or potential customer, it provides permission to duplicate a given logo or specialized design for embroidery purposes. Include your company name, print on letterhead, and you have a formal release to perform the work requested by the signer.

5. **E-Z Customer Policy on their Material** – This single page document clearly states your company position on sewing on customer provided garments. You may or may not want to charge a customer for sewing on their provided material. That is a decision you must make when considering the overall sale of embroidery services. BUT, with the document posted in clear view, you now have the option to enforce the policy, or waive it based upon you evaluation of the sale.

6. **E-Z Sew Out Production Approval –** If you have a large job, it is always a safety precaution to have the customer pre-approve the sewing quality, and colors **BEFORE** the final delivery. This form will help to obtain the approval (and /or any changes) prior to the production.

7. **E-Z Work order form – Need an order form?**   This form was developed over the many years of doing mobile embroidery.   The prices on the form are representative values. YOU may change any value on the form. It is an Excel spread sheet customized for this application.

8. **Buying a Single Head machine** is a summary of things to consider before you write the check. Good information, which will yield a better beginner with less unforeseen pitfalls.

9. **Mobile Embroidery** – the full story is about 25,000 words of "been there – done that for 5 years!" The original article was published in 2 issues of Impressions Magazine – but they only printed half of each article. Here is the "rest of the story – as lived by E- Z Stitches".

10. **"How to Sell Decorated Apparel"** is a composite of numerous slides presented at trade show and conferences – on the techniques and ideas on selling all types of decorated garments. It is basic, factual, and at time very simple, but it is a reminder to the experienced seller and a refreshing "rules of the road" for the novice.

System Maintenance

This single screen is a blessing and a curse! It can help protect your data, allow you to manipulate your data in Microsoft Excel, allow you to change the product table, allow you to store the E-Z Estimator design images onto your hard drive, and it will allow you to **IMPORT** data from another database system. And it is this last point that ultimate care should be taken. I will attempt to make it as clear as possible in the IMPORT directions, **PLEASE BACKUP you data before attempting any data import function.** Each function will be presented in this section.

E-Z Stitches
System Maintenance Functions

Embroidery Pricing Data	File Backup	Product Table Maintenance
Reports	Excel - Import Data	Heat / Screen Product Table
Statistics	Export Invoices to Excell	Supplier Table Maintenance
Friendly Links	Loading Design Graphics	Generate a Purchase Order

Exit
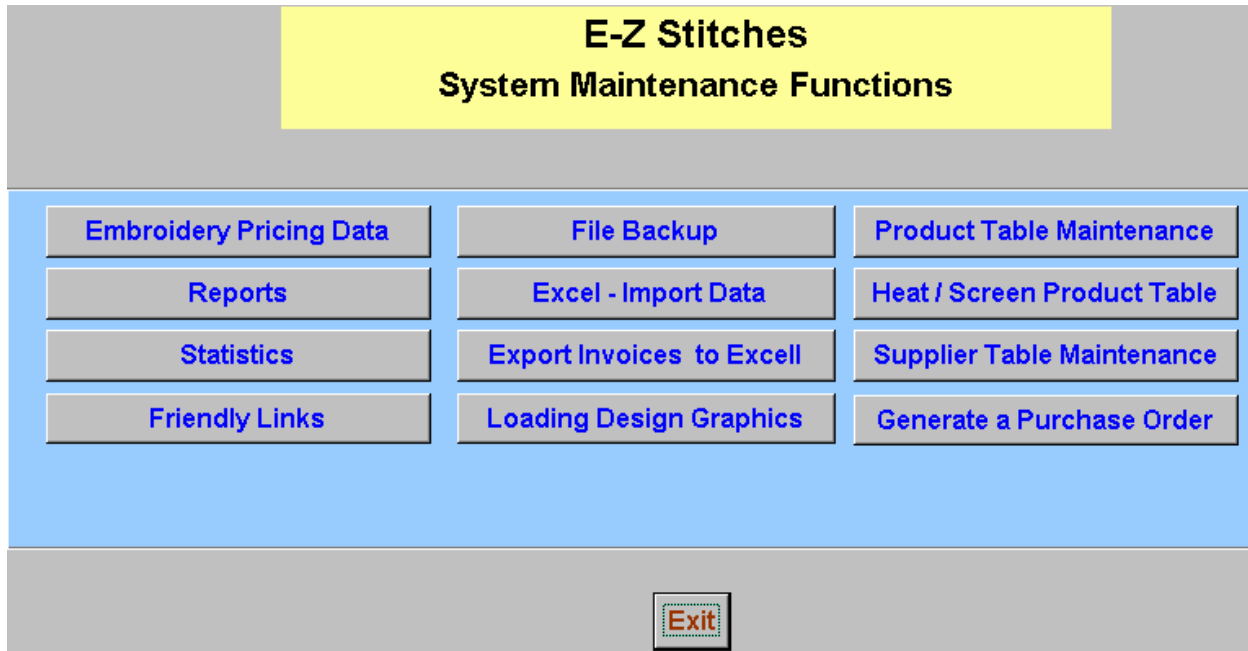
File Backup

When this button is pressed the five primary system files are copied into an Excel spreadsheet format. The data is located in   **C:\Program Files\E-Z Estimator65**. The data will have the date preceding the file names. See Figure 37 below. Notice that an earlier backup was performed on "12-10-2003". Each time a backup is taken these files will be in your directory. Occasionally, you may want to delete any old information. When you BACKUP your data, you will notice on the Main Screen the date of your last complete backup. After Backing up your data, the system will close down, and must be restarted. The new date will appear on the screen.
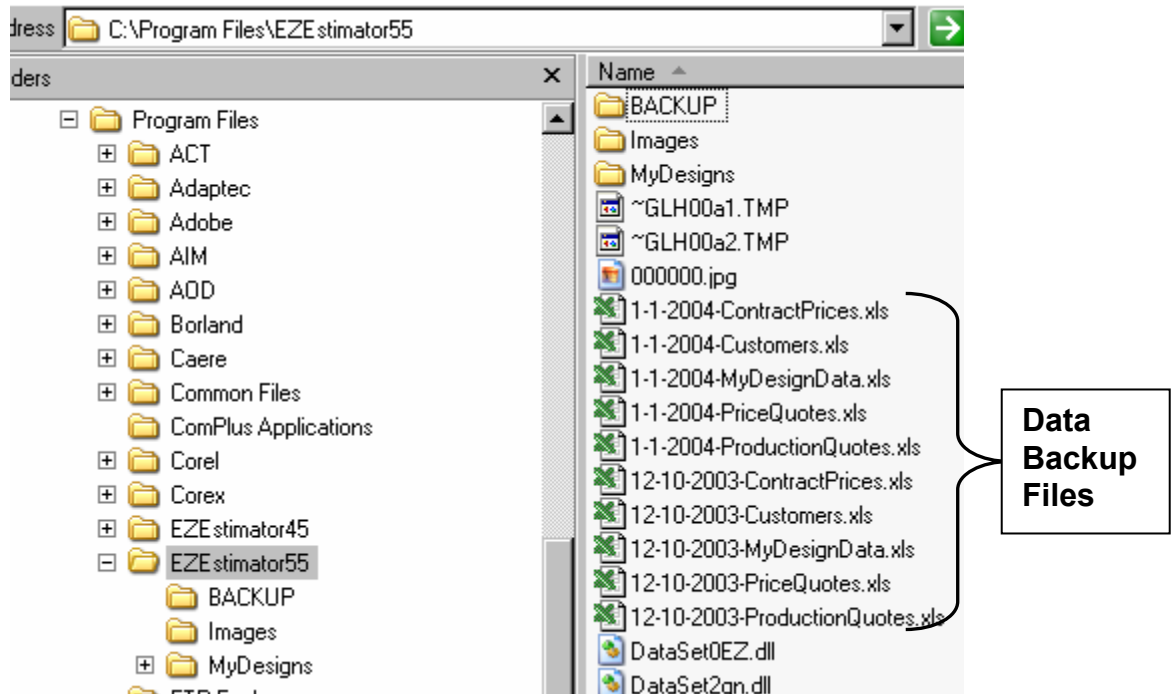
Figure 31

The five primary files that are backed up include:

- The Contract Price data – this is the price grid information
- Customers – all customer information is now in an Excel format
- MyDesignData – is your design information that you entered into the system.
- PriceQuotes – all price quotes saved are copied out.
- ProductionQuotes – any saved production quote is now in Excel format.

If you are experienced with Excel and want to modify any of this data prior to IMPORTING it back into E-Z Estimator – DO NOT CHANGE ANY INFORMATION IN THE TOP OR HEADING ROW OF THE FORM! If you do not know what a data item is for, my suggestion is…. Don't touch it!

Excel Import Data

This is the capability to bring your modified data into the E-Z Estimator system. The ground rules are very simple. If you use an E-Z Estimator existing file and want to add data (more records in the file), i.e. the Customer Database – you MUST place the data in the corresponding fields of data. Name in name, address in address, etc. **The Heading rows in the Excel file are MANDATORY and CANNOT be changed. See below for specifics on adding new customers via the IMPORT process.** This capability is placed here for those who are (to use a term I don't care for) "more computer literate". If you modify the Contract Prices – i.e. **ONLY change the dollar amounts and not the control information**. If you mess up a file – hopefully you will have retained it's original backup that will be used to establish a valid operational file for the E-Z Estimator. If, by some chance, you did not retain a copy of the original file and E-Z Estimator DOES NOT work correctly. Please un-install E-Z Estimator, and re-install it – all the original database information will be re-established. **The import data file must be located in the follow directory (or folder) -**
C:\Program Files\E-Z Estimator65.
When you enter the import file name, **you DO NOT have to enter the directory location**, only the file name in that location. i.e import the Contract Price file use the full file name – no special characters – do include the dashes and DOT xls extention.
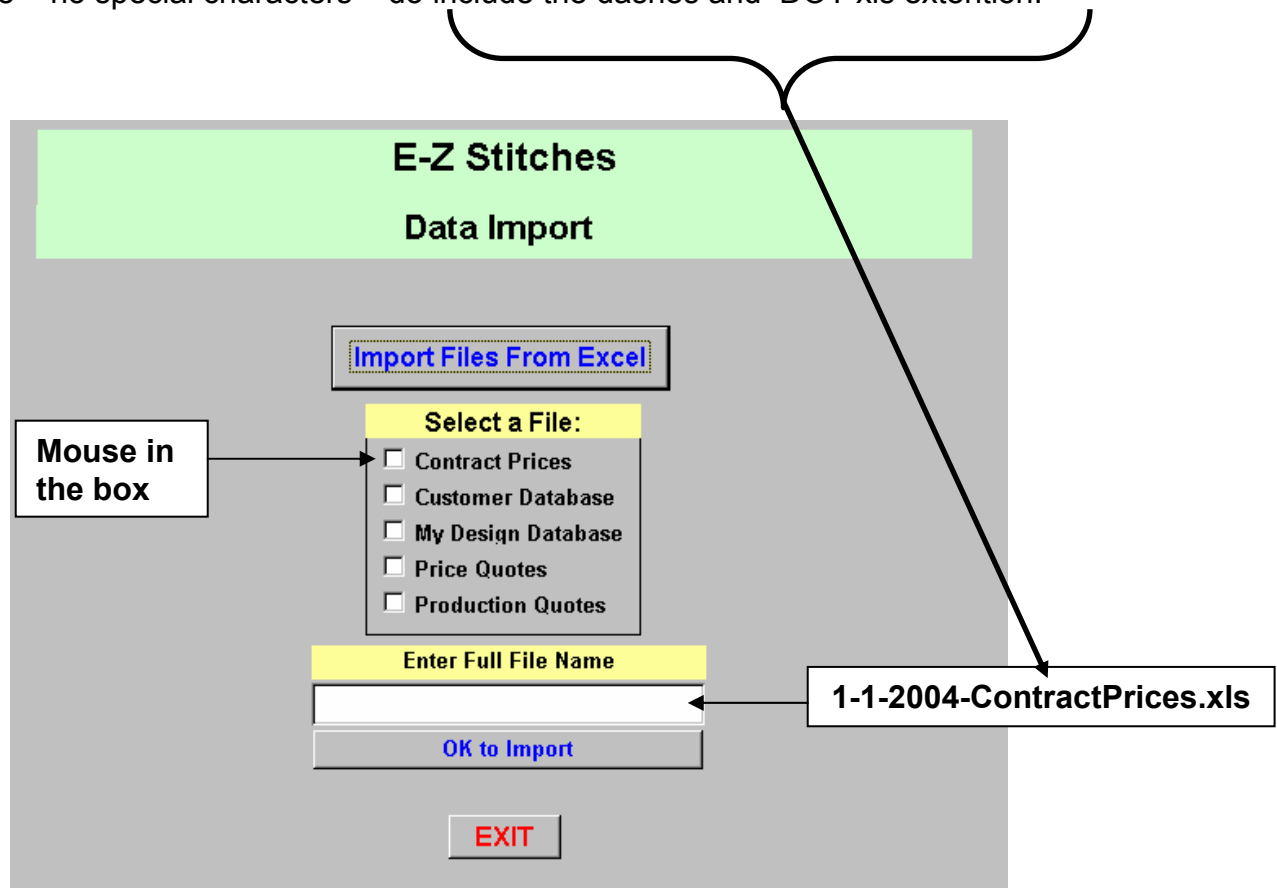
Figure 32

The Customer database is a unique structure of what is routine data, i.e. name, address, etc,. and control information need by E-Z Estimator to provide you optimum advantage and speed in processing customer information. There are several items to be concerned about when "**IMPORTING**" (or adding new customers – via the import process.

- **BACK UP YOUR DATA BEFORE** attempting an import of data.
- Open the "EXPORTED" customer file
  - NOTICE the TOP TWO ROWS of information
  - 1st row is heading information –DO NOT MODIFY, MOVE, ADD or DELETE anything from this row!
  - 2nd row is your company information - DO NOT MODIFY, MOVE, ADD or DELETE anything from this row!
  - Rows 3 – N…. notice the "CustomerID" column. The numbers are sequential (with some missing numbers – that is OK).
  - When you add customers to this file, they must have a sequential number in the CustomerID column. **YOU MUST ASSIGN THE NUMBER. OR you may have EXCEL assign the number using the automatic "copy down" incremental function.**
  - **THE COLUMN CAN NOT HAVE ANY BLANK DATA FIELDS.**
  - Save the data, and proceed to IMPORT the data as documented.

	A	B	C	D	E	F
1	CustomerID	CompanyName	ContactFirstName	ContactLastName	Address	City
2	1	E-Z Stitches	Jim Serritella		Road	Laytonsville
3	2	ABC CO.	Joe Some		1234 RT 450	Bladensburg
4	3	name	Mary Sewer		Street	Rockville
5	4	Company	Mary Jones		Place	Damascus
6	5	Zee Emb.	Emb King		Street	Someplace
7	6	Company	Robert Jones			Atlanta
8	7	Joes Emb Shop	Joe the sewer			
9	8	Shop	Bob Jones		777 Somplace	Reno
10	10	Inc.	Robert Smith III			
11	11	schools	one!!			
12	13	Team Sports	Ralph Loren		123 ABC st.	NY.
13	14	Teams & Tees	Rob Young		Road	Gaithersburg
14	15	Clothes	Barbara S.			
15	17	Emb shop	Uncle Tom		brick road	Somewherein
16	18	New Biz	Joe Cane		Blvd.	Arlington
17	19	New bee	Betty the Boop		Lane	Somewhere
18						

Figure 33 Screen shot of Customer file in Excel

Loading Design Graphics

The E-Z Estimator provides design thumbnail images for quotes and emails. These images must be stored in the system, and the system must know where the images are stored. If you prefer to use the images directly from the CD – there will be no problem. The E-Z Estimator will run "a little slower" – but I'm sure this minuscule processing time won't impact your system performance. If you prefer to load the thumbnail images directly onto you hard drive, the system has the ability to process that task.

This screen is there to remind you of the impact in TIME AND SPACE should you elect to place the images on your hard drive. The images will be written to the following directory or folder:

C:\Program Files\E-Z Estimator65\Images

Do not confuse this directory with where you store images for your own personal designs. They are different directories.

Please Read Carefully

If you want to use thumbnail graphics throughout the system and its output document, you must designate where the photos will be stored.

You may use the design images directly off the installation CD.... OR you may copy the design images onto your hard drive.

If you use WINDOWS 95, 98, Windows 2000 or XP using FAT 16 or FAT32, DO NOT copy the images onto your hard drive. There is NO guarantee of being successful. See the manual for additional details.

If you use WINDOWS 2000 or XP (using NTFS), it will take about 20 minutes.

There are approximately 90,000 graphic images to copy onto your hard drive. Be sure you have 50 MegaBytes available for image files.

Please select one of the following options.

☐ Use the images on my EZEstimator CD.
☐ Copy the images to my hard drive.
☐ Do not use graphics at this time.

EXIT

Figure 34

Product Table Maintenance

This is a request from the users of E-Z Estimator to have the ability to add their own products to the Product Table. This screen will allow you to modify the Product Table.

Product Table

Product Table Maintenance

Product Name   Aprons

Add New Product   ←   →   Save Product Record

Exit

Figure 35

Product Table

Product Table Maintenance

Product Name   Aprons

Aprons
CD Cases
Fleece
Polo shirt
Robes
Socks
Sweaters
Sweaters
Sweatshirts
Tote Bag
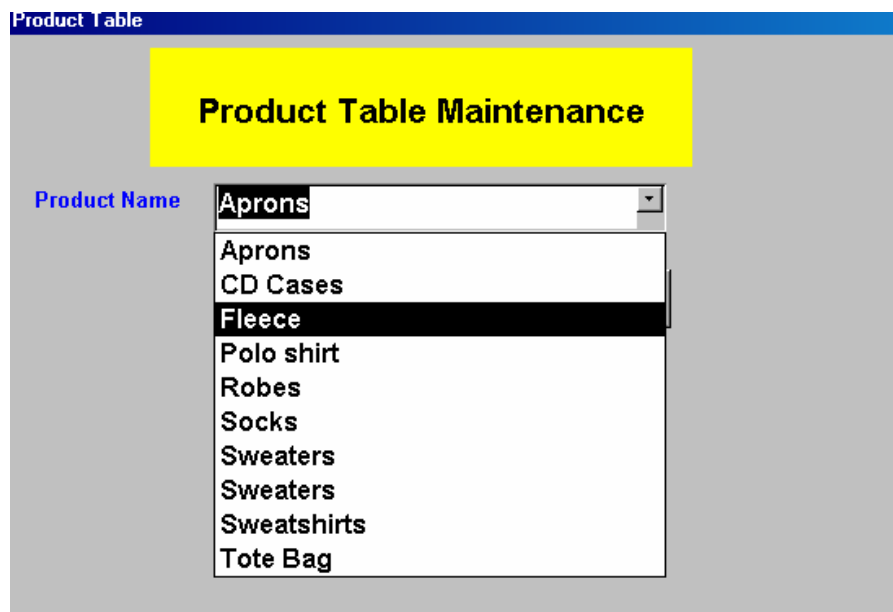
Figure 36

To delete a product – type over the old name and add a new name. If you add "Hats" you may want to add "Hats – Otto pg 5 style 123" (if you use that hat frequently). And you have created an automatic reference to the supplier. Several options here for you own use.

Heat Press / Screen Print Product Table

This table is the supplier catalog used for the selection of material to decorate. Individual products may be added or deleted from the table. Additional catalog data may be added to the product table. Follow the directions in the program to import additional data.

The Catalog Functions can import a full (or partial) supplier catalog (in Excel format). Or delete an entire supplier from the system.

Supplier Table Maintenance

The new table stores all supplier data that can be used for purchase orders, and related catalog information.

This is a straight forward application of data entry of your selected companies.

Purchase Orders

Purchase orders may be generated for a specific vendor, or it may be generic and completed by hand and printed. POs may be printed and FAXed or emailed to the recipient. The information is supplied from the vendor table. The product information may be provided from the product table, if available.

Reports

E-Z Estimator contains eight reports in this release.   Over and above the printed quotations (also available in Print Preview Mode), the new reports present customer history data, production and scheduling information, monthly and year-to-date financial data, and a full printout of all the price quotations.   The Report Screen is as follows:
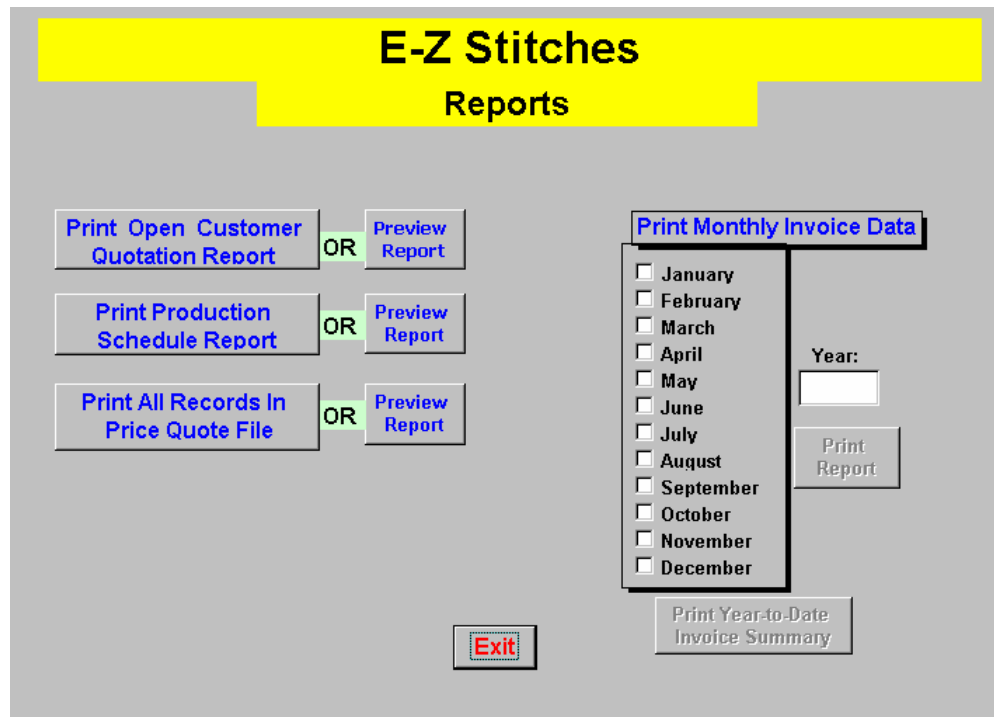
Figure 37

Sample reports are also included in the manual for your review. In order to obtain a YTD financial report, enter the calendar year i.e. 2003, and press "Print Year-To-Date Invoice Summary". Monthly reports are available by selecting the month and year, then "Print Report".

All Customer Quote Data
The following report (only 1 page illustrated) is for **All Customer Quote Data**.

All Customer Quote Data

As Of: 12/30/2003
= Open
- Closed
+ Invoiced

Company Name	Q #	Quantity	Tax	Total Price	Quote Date	Prepared by:
	250	2	$0.58	$12.21	11/29/2003	=Jim S.
	252	3	$0.78	$16.48	11/29/2003	=Jim S.
	255	2	$0.63	$13.29	12/2/2003	=Jim S.
	263	3	$0.97	$20.43	12/3/2003	=Jim S.
Totals (4 Transactions)		10	$2.97	$62.40		
ABC CO.	184	3	$0.00	$11.50	11/6/2003	=Jim S.
ABC CO.	251	3	$0.87	$18.31	11/29/2003	=Jim S.
ABC CO.	67	55	$0.00	$0.00	4/17/2003	=Jim S.
ABC CO.	237	1	$1.91	$40.20	11/19/2003	=Jim S.
ABC CO.	157	3	$1.53	$32.08	10/18/2003	=Jim S.
ABC CO.	156	2	$2.08	$43.69	10/18/2003	=Jim S.
ABC CO.	18	55	$0.00	$0.00	4/17/2003	=Jim S.
ABC CO.	80	5	$0.00	$0.00	9/17/2003	=Jim S.
ABC CO.	236	1	$1.91	$40.20	11/19/2003	=Jim S.
Totals (9 Transactions)		128	$8.31	$185.97		

Open Customer Quotations

Open Customer Quotes will assist you in keeping track of the open quotations by customer, and product. It is a way to market and remind your customer that this is pending and you are ready to begin the order. The number of Open Customer Quotations is readily seen on the main screen of E-Z Estimator, directly under the Price Quotation button.

E-Z Stitches
Open Customer Quotations As Of 30-Dec-03

Q#	Company Name	Primary Contact	Phone Number	Quote Date	Quantity	Product	Price Quote
250				11/29/2003	2		$12.21
252				11/29/2003	3		$16.48
255				12/2/2003	2		$13.29
253				12/3/2003	3		$20.43
18	ABC CO.	Joe Some	(202) 283-7460	4/17/2003	55	Towels	$0.00
67	ABC CO.	Joe Some	(202) 283-7460	4/17/2003	55	Towels	$0.00
80	ABC CO.	Joe Some	(202) 283-7460	9/17/2003	5	K Belts	$0.00
156	ABC CO.	Joe Some	(202) 283-7460	10/18/2003	2	Denim Shirt	$43.69
157	ABC CO.	Joe Some	(202) 283-7460	10/18/2003	3	Dog Collars	$32.08
184	ABC CO.	Joe Some	(202) 283-7460	11/6/2003	3	Fleece	$11.50
236	ABC CO.	Joe Some	(202) 283-7460	11/19/2003	1	Fleece	$40.20
237	ABC CO.	Joe Some	(202) 283-7460	11/19/2003	1	Fleece	$40.20
251	ABC CO.	Joe Some	(202) 283-7460	11/29/2003	3	Fleece	$18.31
19	Beata Test Company	Robert Jones	(303) 123-4556	4/17/2003	25	Polo Shirt	$0.00
23	Beata Test Company	Robert Jones	(303) 123-4556	4/7/2002	52	Fleece	$0.00
37	Beata Test Company	Robert Jones	(303) 123-4556	4/17/2003	22	Polo Shirt	$0.00
41	Beata Test Company	Robert Jones	(303) 123-4556	4/17/2003	41	Polo Shirt	$0.00
43	Beata Test Company	Robert Jones	(303) 123-4556	4/17/2003	88	Tee Shirt	$0.00
45	Beata Test Company	Robert Jones	(303) 123-4556	4/17/2003	200	Tee Shirt	$0.00
48	Beata Test Company	Robert Jones	(303) 123-4556	4/17/2003	253	Towels	$0.00
83	Beata Test Company	Robert Jones	(303) 123-4556	9/2/2003	54	Aprons	$0.00
94	Beata Test Company	Robert Jones	(303) 123-4556	9/18/2003	1	Hats	$0.00
149	Beata Test Company	Robert Jones	(303) 123-4556	10/18/2003	4	Robes	$149.44
150	Beata Test Company	Robert Jones	(303) 123-4556	10/18/2003	4	Robes	$149.44
167	Beata Test Company	Robert Jones	(303) 123-4556	10/21/2003	4	Aprons	$75.86

Page 1 of 5

Production Schedule Report

The **Production Schedule Report** is by date and displays all production jobs to be completed by "Date Required". Use this report to manage and schedule the overall workload. Only two pages of the report are shown.

E-Z Stitches
Production Schedule Report

12/30/2003

Date Required by		Tuesday, October 21, 2003					Sewtime for 1 mm	Total time / Notes
Customer Name	Q#	Product Name	Quantity	Stitches Ct.	Machine Speed	#heads		hh:mm
ABC CO.	209	Dog Collars	33	4321	600	2	7:27	2:44
Zee Emb.	15	Tote Bags	28	8500	750	2	11:29	3:35
ABC CO.	33	Aprons	23	3456	600	2	6:01	1:33
ABC CO.	34	Aprons	23	3456	600	2	6:01	1:33
Beata Test Company	38	Dog Collars	22	2222	600	2	3:57	0:59
Beata Test Company	39	Dog Collars	22	2222	600	2	3:57	0:59
ABC CO.	96	keychain	28	8500	750	2	11:29	3:35
Beata Test Company	98	Aprons	10	4000	750	4	5:29	0:21

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Date Required by							Sewtime for 1 mm	Total time / Notes
Beata Test Company	99	Aprons	10	4000	750	4	5:29	0:21
ABC CO.	102	Fleece	23	2323	600	2	4:13	1:05
Zee Emb.	12	Aprons	28	8500	750	2	11:29	3:35
E-Z Stitches, Inc.	207	CD Cases	5	5600	600	2	9:41	0:37
Zee Emb.	233	Hats	28	8500	600	2	14:19	4:28
Jim Serritella	246	Tote Bags	28	8500	750	2	11:29	3:35
								This is a test...□□Gotta get it right!
Summary: (14 Jobs)			311	74100				

Date Required by		Wednesday, October 22, 2003					Sewtime for 1 mm	Total time / Notes
Customer Name	Q#	Product Name	Quantity	Stitches Ct.	Machine Speed	#heads		hh:mm
Joes Emb Shop	120	Polo Shirt	28	8500	750	2	11:29	3:35
Jones Specialty Shop	36	Aprons	22	2222	600	2	3:57	0:59

Page 2 of 13

Customer History

The Customer History report (available from the Customer Screen, also in Preview mode) quickly identifies your customer's level of activity. Here, the ABC Co. has several = Open quotes, but no + Invoiced items (no sales!). It is time to market a little better to this customer.

Customer History

As Of: 12/30/2003

= Open
- Closed
+ Invoiced

ABC CO.

Q #	Quote Date	Item	Quantity	Total Price	Prepared by:
67	4/17/2003	Towels	55	$0.00	=Jim S.
18	4/17/2003	Towels	55	$0.00	=Jim S.
80	9/17/2003	K Belts	5	$0.00	=Jim S.
157	10/18/2003	Dog Collars	3	$32.08	=Jim S.
156	10/18/2003	Denim Shirt	2	$43.69	=Jim S.
184	11/6/2003	Fleece	3	$11.50	=Jim S.
237	11/19/2003	Fleece	1	$40.20	=Jim S.
236	11/19/2003	Fleece	1	$40.20	=Jim S.
251	11/29/2003	Fleece	3	$18.31	=Jim S.

Quantity: 9

Consolidated Statement

The Consolidated Statement (Printed from the Price Quotation Screen), is shown below. It is formatted to print on either plain paper or company letterhead (if you have the necessary spacing in the top of your letterhead).

E-Z Stitches

30-Dec-03

Statement

Company Name and Address	Mary's EMB Company	Contact Information:	
		Phone: (301) 253-3600	EXT
	Mary Jones	Fax	
	1234 Hilton Place		
	Damascus, MD 20872	Email:	
		Prepared by: Jim S.	

Invoice Date	/No.	Description	Quantity	Amount
30-Nov-99	72	Polo Shirt	24	$352.63
30-Nov-99	86	Aprons	41	$328.70
21-Sep-03	99	new coat	44	$0.00
		Total Amount Due		$681.33

E-Z Estimator Statistics

The E-Z Estimator Statistics is presented in Figure 30. You may access this screen from the System Maintenance screen.
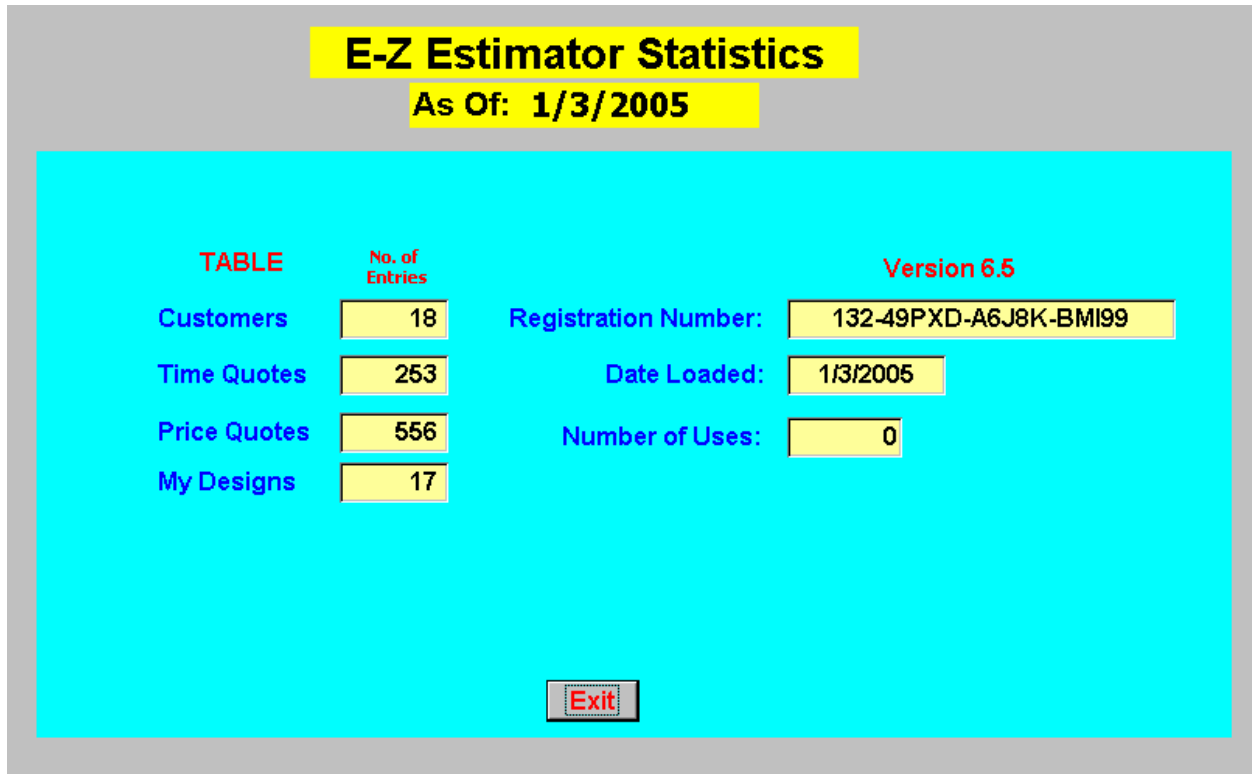
Figure 38

Monthly Invoice Report

The Monthly Invoices are printed by customer. A sample of the Monthly Invoice report is seen in Figure 39 .

E-Z Stitches
Monthly Invoices   As of   1/1/2004

Invoice Date /No.	Quantity	Item	Taxes	TotalPrice
Jones Specialty Shop				
10/18/2003 155	12	Polo shirt	$13.71	$287.96
10/18/2003 148	4	Aprons	$2.92	$61.26
Totals (2 Transactions)	**16**		**$16.63**	**$349.22**
Mary's EMB Company				
10/21/2003 169	44	new coat	$92.69	$1,946.51
10/20/2003 164	4	CD Cases	$2.87	$60.33
10/18/2003 159	34	Fleece	$63.57	$1,334.88
10/18/2003 142	44	new coat	$71.09	$1,492.93
10/17/2003 133	3	Denim Shirt	$0.75	$15.75
Totals (5 Transactions)	**129**		**$230.97**	**$4,850.39**
Grand Totals	**145**		**$247.60**	**$5,199.61**

Figure 39

Summary Invoice Report

The YTD Summary Report is present in Figure 40.

E-Z Stitches
YTD Summary   As of   1/1/2004

Company Name	Quantity	Taxes	Total Price
Jones Specialty Shop			
Totals (2 Transactions)	16	$16.63	$349.22
Mary's EMB Company			
Totals (5 Transactions)	129	$230.97	$4,850.39
Grand Totals	145	$247.60	$5,199.61

Figure 40

Design Browser

The Design Browser feature allows you to search the design database for a particular design image, i.e. search the database for "Angel". You are able to look at the images of any selected design along with relevant stitch count, size information, and supplier data (should you want to obtain the design). Some suppliers may not have provided thumbnail images of their designs, a message will be displayed instead. Figure 41 is a screen shot of this capability.
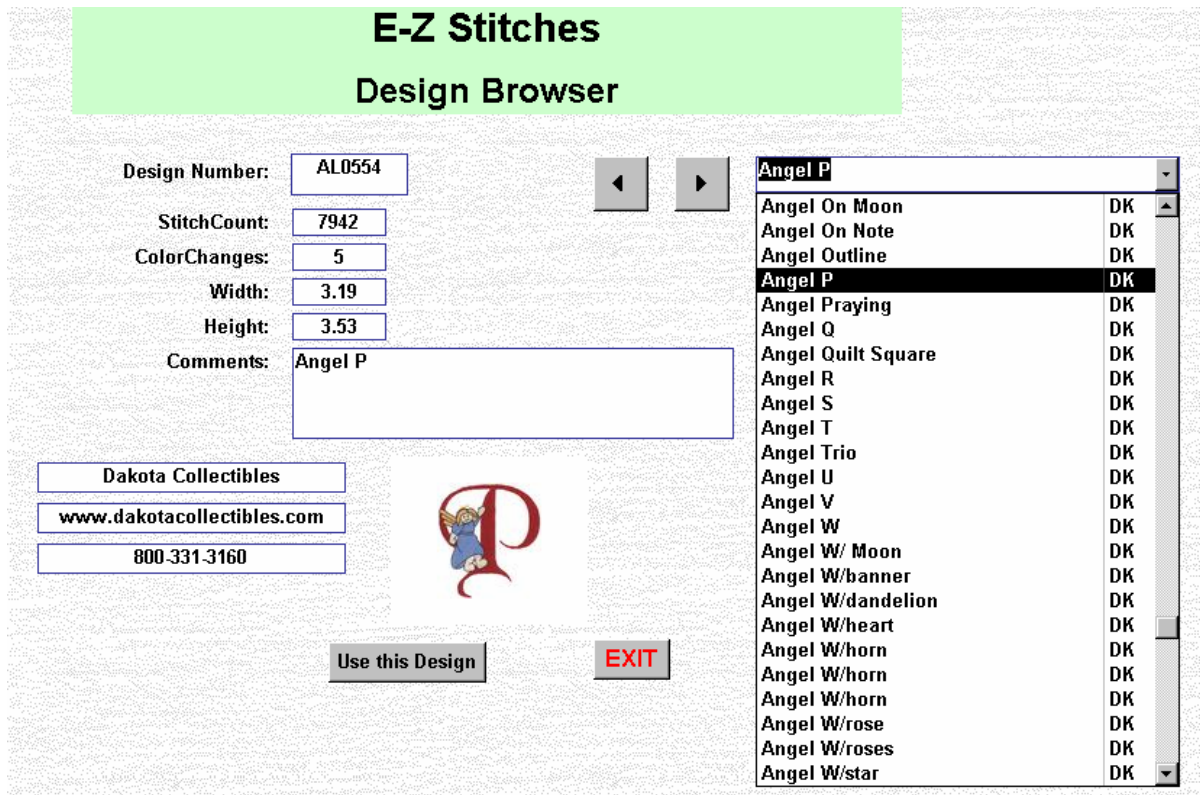
Figure 41

When you **click "Use This Design"**, all relevant data is transferred into the E-Z Estimator Production Screen.

Your Design Data

This screen allows you to view and use your designs with the E-Z Estimator. Enter your design information into the form, and save your entry. The use of this form has two rules. 1) the Design name / number must be unique – you may not use the same Design Name or Number for another design. Only 6 characters of data are available for identification. **DO NOT USE ANY SPACES IN THE NAME OR NUMBER.** 2) If you use thumbnail images, you must store the thumbnail file name (exactly as the Design name) in this location -

C:\Program Files\E-Z Estimator65\MyDesigns\Images

Figure 42

When you click **"Use This Design"**, all relevant data is transferred into the E-Z Estimator Production Screen.

The two reports available for Print / Preview are the "By Design Number" Figure 43, and "By Description" Figure 44.   **HINT** – Place your customer name in the description, and then enter specific text, and your client designs will be grouped together.

E-Z Stitches
Design Data by Number
1/1/2004

Design Nmbr.	Stitch Count	Colors	Width	Height	Comments
1100	3254	2	3	2	Small Bird black, white
1234	4444	4	2.5	2.8	Test Name
1236	5678	2	3	3	Logo green, gold
2354	2200	3	2.5	2.5	Dog collar
8888	7654	3	2.5	4.2	Tower with spire
C716	4532	4	3.2	4.1	Car convertible, black, red, green, silver
J121	4532	2	3	4	Jacket pocket
N3456	6543	4	3.5	3.7	Nomad on sled
T4567	6754	3	2.4	5	Tractor truck, red, silver, black
W1234	6543	3	4.5	3.2	Peace sign.. (Dakota graphic used for testing) red, blue, green
X721	4000	3	4.5	5	Lighthouse
Grand Total	**56134**		**11 Designs on File**		

Figure 43

E-Z Stitches

Designs On File by Description

BY Design Description   **As Of: 1/1/2004**

StockCode	StitchCount	Color Changes	Width	Height	Description
C716	4532	4	3.2	4.1	Car convertible, black, red, green, silver
2354	2200	3	2.5	2.5	Dog collar
J121	4532	2	3	4	Jacket pocket
X721	4000	3	4.5	5	Lighthouse
1236	5678	2	3	3	Logo green, gold
N3456	6543	4	3.5	3.7	Nomad on sled
W1234	6543	3	4.5	3.2	Peace sign.. (Dakota graphic used for testing) red, blue, green
1100	3254	2	3	2	Small Bird black, white
1234	4444	4	2.5	2.8	Test Name
8888	7654	3	2.5	4.2	Tower with spire
T4567	6754	3	2.4	5	Tractor truck, red,silver, black

11   Designs on file

Figure 44

Security

Security and Password Protection

The dilemma for this task was, "How much protection do you really need in a Production Estimating System"?   The more new features added to the E-Z Estimator system, it became apparent that the system had grown into a full fledge business application with cost and production reports, export capability of databases, and the ability of employees to have access to company sensitive information. That being said, a modest security and password module was added to the E-Z Estimator System.

Importance of Security

As a result of using password security, screens were blocked from "employee access", and data fields were protected from "employee misuse".   The term "employee" is generic to whomever you have working the system that you do not want them to see or have access sensitive data.

If Password Protection is ENABLED, the following screens require password validation:

- Company Screen – Company data cannot be seen or modified
- Price Data Screen – Password Required
- Customer Screen – a customer list is available from Production and Price quote screens. They do not need access to full information.
- System Maintenance Screen – No need to export/import data files without your awareness.
- Reports Screen – Password Required
- SPECIAL ATTENTION is given the Price Quotation screen.
  - An individual may not adjust the Product Markup Percentage without the password.
  - The TAX percentage cannot be removed without the password.
  - The DISCOUNT percentage REUIRES a password if the actual is greater that 10%. (minimal employee latitude provided).

No system is bulletproof! E-Z Estimator has provided a modest protection level of employer/employee validation. The disclaimer here is simple. Be judicious in protecting your data. We do not warrant this system foolproof for convert efforts to access your information.

Setting the Password
To set a password and block access to several screens,
enter the **Company Information Screen**. Mouse in the notes box. Type,

"setpassword=**********"   DO NOT USE THE QUOTE SIGN OR THE *****
                                            Password must by 4 to 10 characters, no spaces,
                                            alphabetics or numerics only
                                            Press TAB key.
                                            This screen will appear…. Re-enter password
                                            EXACTLY as before.

Figure 45

The following screen will appear if done correctly.

Figure 46

Upon restarting the system, you will notice the following message on the main screen.
It will remain there until the password is removed from use.

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System Security Is Enabled
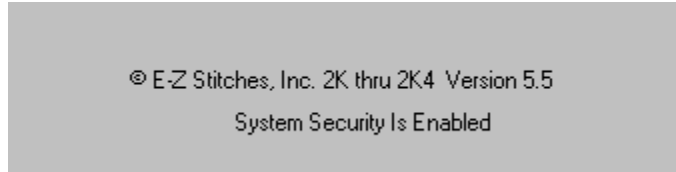
Figure 47

Removing the Password
There are times when the password must be removed. In order to remove the password, follow these procedures.

Enter the **Price Quotations Screen**
Mouse in the Company Name box.

Enter:

"Removepassword=**********"   Do not use Quote Marks – note capital R
                                     Enter the password EXACTLY as it was originally
                                     entered.
                                     Press the TAB Key.

A message will appear confirming the removal of the password. E-Z Estimator must be restarted after this action.

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You may use this form to help organize your thoughts about the E-Z Estimator.

Name	
Company	
Email address	
Phone	
Ease of Use:	
Would like to see:	
A bug? Cite conditions that presented the problem	
Overall comments:	

Thank you for purchasing the E-Z Estimator.

The end….

And

Thank you for purchasing

The E-Z Estimator 6.5