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PURPOSE/SCOPE:

- The purpose of this instruction is to accurately estimate both produced and purchased out goods. It will provide a step by step guide to estimating which uses the Advanced Software estimating system. It will cover all elements associated with job costing and farm out items. This includes accounting for all material, labor, machine rates, overhead, time studies, freight, machine speeds, order processing charges, warehousing, and any other raw materials used to create finished goods.

RESPONSIBILITIES:

- Outsourcing agent, Customer Service, Customer Service Supervisor, Designers, Design Manager, Tooling Coordinator, Sales Manager, Sales Representatives, Owners, Distribution Manger, Shipping Supervisor, Plant Manager, Assembly Superintendent, Assembly purchasing agents, Corrugated purchasing agents, Industrial purchasing agents, Scheduler, production and assembly leads

PROCESS: **STEPS TO BUILD A SINGLE ITEM ESTIMATE**

1. Enter E-C from the Main Menu – ESTIMATING / QUOTES – CORRUGATED BOX ESTIMATE
   A. ESTIMATE TAB click "ADD" button / icon at the top of the page.
      1. Select "NEW ESTIMATE" button
      2. An estimate number will populate the *Estimate #* field.
      3. Enter CUST# / code. If customer is unknown, click F1 and select from the Customer information search field. **MUST HAVE CUST# IN ORDER TO BUILD ESTIMATE.**
      4. Enter the customer's part number in CUST PART # field. If none is given then type inside dimensions of product (This is subjective). A customer part number is preferred.
      5. Enter Customer ship to: It defaults to the customer code entered in step 3. If the product is for a different location enter the correct ship to location. Click F1 and select from the ship to information search field.
      6. Complete Item Name. Be as descriptive as possible.
         a) Types of descriptions:
            (1) Customer part # or additional customer name / number
            (2) Inside dimensions of carton
            (3) Board grade & flute / Foam density / mil thickness
            (4) Blank sheet size
      7. Finished Good Item field. Skip while estimating. This field will be populated if the estimate becomes an order.
      8. Enter QTY in EST QTY field. If more than one QTY, click F1 and enter quantities and releases in the Quantity detail information window. Must

use tab key to enter multiple qty's and releases. Select OK when qty entry is complete.

9. Enter STYLE. Type in style or click F1 to select from the style code database.
    a) Knowledge of style codes and descriptions is essential.
    b) EX. RSC = regular slotted container. This style can be estimated many ways. Such as:
        (1) RSCSQ = square carton
        (2) RSC2up = 2 out
        (3) RSC2GT = 2 inch glue tab Etc…
10. Enter FLUTE. Type in flute or click F1 to select from the flute code information window.
    a) Knowledge of flute codes and descriptions is essential.
11. Enter TEST. Type in Test or click F1 to select from the test code information window.
    a) Knowledge of test codes and descriptions is essential.
12. Enter In or Out in TAB field to determine the position of the glue tab. If the carton requires no glue then the field will default to style file.
13. Enter BOARD *(32 ECT will default in this section).* Type in board combination or click F1 to select from the board information search window. Select generic board grades. Do not select vendor specific board grades.
    a) Knowledge of board grade codes and descriptions is essential.
14. CALIPER field is automatically populated from selection of flute, test and board in steps 10 thru 12.
15. Enter CATEGORY. Type in category or click F1 to select from the FG Product Category Information search window.
    a) Only 4 categories are used for estimating at this time. They are:
        (1) BOXES = manufactured corrugated at Premier
        (2) RESAL = any purchased product
        (3) FOMFG = manufactured foam or sets at Premier
        (4) WIP = any product purchased or manufactured that is part of a set
16. Determine Length, Width and Depth fields based on style codes.
    a) Enter LENGTH, WIDTH & DEPTH for cartons with inside dimensions. Such as: RSC – HSC – FOL, etc...
    b) Enter LENGTH & WIDTH blank size dimensions for DC = die cut cartons, PAD = pads, FDC = foam die cut, SS = scored sheets etc… The DEPTH field is skipped. The corrugation direction must be entered in the WIDTH field.

c) FRACTIONS – when entering fractions in ASI, use the following table:

Fraction	ASI input
1/16	0.01
1/8	0.02
3/16	0.03
1/4	0.04
5/16	0.05
3/8	0.06
7/16	0.07
1/2	0.08
9/16	0.09
5/8	0.1
11/16	0.11
3/4	0.12
13/16	0.13
7/8	0.14
15/16	0.15

17. Skip the FORM and BLANK fields.
18. Enter the number of colors. (There is no F1 key function for this field) Enter the number of inks to be used when printing is necessary. If there are more than 2 colors then the estimate must be either:
    a) An outside purchase (submit to Outsourcing Agent to get a cost)
    b) Seek production approval.
19. Skip the PASSES, COATING and COAT PASSES fields. (these fields are used primarily in the folding carton industry)
20. QTY / SET field should be set to 1 for a single item estimate. The only exceptions are the following style files or any items that are part of a SET:
    a) 2HSC - Two Piece HSC
    b) 2RSC - Two Piece RSC
    c) FO2 - Two Piece FOL
    d) 2TU - Two Piece Glued Tube
21. ASI automatically skips the following fields
    a) INKS/FORM
    b) PASSES/FORM
    c) COATINGS/FORM
    d) COAT PASSES/FORM

22. PURCH/MANUF – This field is used to determine whether the item is purchased from an outside vendor or manufactured by Premier. Select P for Purchased or M for Manufactured. (See section J - Farm Out Tab)
23. Confirm EST DATE.
24. Enter your name under the DESIGNER NAME field.

B. SPECS TAB - Override vs. Auto Calculate
   1. Override / Auto Calculate are used to update the following steps (B-1 - a thru o) in order by hitting the tab key: Override allows custom changes to each field. It is not governed by system parameters. Auto-Calculate is used to update all of the same fields as the override function. Auto-Calculate will default all fields to the system parameters including fields that were overridden.
      a) Bypass the FROM and Yellow check box.
      b) Confirm / Change the CUST#, SHIP TO, Cust Part #, FG Item# (if applicable), Item Name and Description boxes.
      c) Die # field is referenced in separate work instruction(03-WI-XXX)
      d) Bypass Image box.
      e) Confirm / Change Sales Rep for the account and reps %. (very important to check when copying estimates)
      f) Insert issued CAD# or bypass if there is not one created.
      g) Plate # field is referenced in separate work instruction(03-WI-XXX)
      h) Confirm / Change FG Category. For estimated goods reference section I- A 15-1 thru 4.
      i) Bypass the SPC/QC # and UPC# boxes
      j) Confirm / Change Style Code, Flute and Test.
      k) Confirm / Change Tab in or out based on the style code selected.
      l) Bypass Metric box
      m) Confirm / Change Board, Length, Width, Depth Joint Material, Top/Dust Flap, Bottom Flap, Lock Tab and Joint Tab Width.
      n) Confirm / Change Scores on Width and Length. Click F1. A separate window will appear. Check scoring based on the style file and flute. Manually override the scoring allowances if necessary, such as shying the flaps.
      o) Confirm / Change Tuck, Joint Length, Blank Width, Blank Length and Blank Square Feet.

C. LAYOUT TAB - Override vs. Auto-Calculate
   1. Override. As stated in B-1, override will allow custom changes to fields and will not be governed by the system parameters. It does not allow changes to the Machine CODE. The following steps are available in Override.

a) Bypass Front-Back and Side-Side dimensions of the machine
   (1) Front-Back is commonly known as through the machine, and the machine cylinder's dimension.
   (2) Side-Side is commonly known as the sheet length maximum and machine cylinder's length.

b) Rev Corr has 3 selections. They are N, B & S. (click F1)
   (1) N = Normal - meaning width through machine
   (2) B = Blank - corrugation running the length of the sheet
   (3) S = Sheet - corrugation running the length of the sheet

c) Confirm / Change Board

d) Cost per MSF. Enter unit of measure to override the cost defined in the board file. If it is not used then the cost will remain what is in the system. Valid unit of measures are:
   (1) EA - each
   (2) LB – one pound
   (3) LF – Linear feet
   (4) MSF – Thousand Square Feet
   (5) MSH – Thousand Sheets
   (6) TON – One Ton

e) Cost per Freight. Freight/MSH Sheets - Numeric digits with three decimal positions. This is the cost for freight charge that your board supplier charges if the cost is not included in the board cost. Click F1 to see other UOM options such as:
   (1) CWT – Cost Per Hundred Weight
   (2) MSF – Thousand Square feet
   (3) MSH – Thousand Sheets
   (4) TON - One ton

f) NC field means either charge or no charge for the board cost. No F1 look up available. Type either N for no charge or C for charge. The system defaults to C.

g) Gross Sheet size is determined by the # out and the # on. *The cost estimating system, by default, will max out the number of outs possible within the machine limitations for Front-Back and side-side on all estimates*.
   Confirm / Change Width and Length sheet size. It is the estimator's decision to determine the # out and # on by machine. Therefore the system default is often changed by estimator to select the correct # out and # on.

h) Net Sheet size – bypass

i) Die Size –is used to determine nested tooling on die cuts) *It is used to insert the die size and to accommodate nested tooling* *situations such as half outs or nested dies that use common knife in multiple locations on the tool.*

j) Determine # ON. This field is used for Die cut machines and determines the number out per width and per length. The system will issue the max amount possible within the machines parameters. It is the estimator decision to determine the actual sheet size and number out per sheet.

k) Determine # OUT. This field is used for SLITTER and specific applications for Flexo presses. It determines the number out per width and per length. The system will issue the max amount possible within the machines parameters. It is the estimator decision to determine the actual sheet size and number out per sheet.

l) By pass Cut field – it is determined by what is inserted in # out field.

m) By pass Die Inches field.

n) Adders: This section accounts for specific liner combinations, colored liners, coating applications, special adhesives, corrugator printing, cut off limits / upcharges Etc. It is limited to six Adders per estimate. Examples below:

   (1) 33 Med = 33 LB Medium Upcharge
   (2) CW 35# = 35 LB CW/KLA White Upcharge
   (3) Mul <26"L = Multicorr Upcharge <26"L
   (4) Mich 40hcl = Michelman 1 Side 40H Clear
   (5) WPA SW = Waterproof ADV. MULT SW

o) Bypass Wax / Label. This does not apply to Premier's press options or business model.

2. Auto-Calculate is used to update most all of the same fields as the override function. Auto-Calculate will default all fields to the system parameters including fields that were overridden. Below are differences between auto calculate and override
   a) Auto Calculate is the only option which allows changes or updates to the Machine CODE.
   b) Auto Calculate is unable to update Gross Sheet field.
   c) Auto Calculate is unable to update Net Sheet field.
   d) Auto Calculate is unable to update Die size field.

The only way that auto calculate affects the Gross, Net and Die sheet fields is by changing the # on and # out fields.

D. INKS / PACK TAB

1. Update Ink Button - Tab through fields as follows:
    a) The number of colors will pull from what was input on the Estimate tab (1-A-18). This can be updated to include as many as ten ink codes.
    b) Bypass – Passes
    c) Bypass – Coatings
    d) Bypass – Passes (coatings)
    e) Blank Field – subjective use for comments
    f) PS Field – matches the number of inks chosen.
    g) Code field – Click F1 to determine ink. Must pull from the following ink classifications. Examples:
        (1) PMS 144 OR
        (2) GCMI 90 BL
        (3) ANTIFOAM – special additive

Select the correct inks for the substrate being run. Choose PMS coated or GCMI Graphic Supreme for white liners. Choose PMS uncoated or GCMI Kraft Master for kraft liners.

    h) Description field - confirms your ink code.
    i) % field – determines the amount of ink that is issued to the estimate / job based on the print coverage. The default is 10% for standard cert and part number printing. Anything other than standard should have a higher percentage. This is subjective.
2. Reset Ink Button – This will default to system parameter called “INK DARK – Dark ink for estimating”
3. Override Unit Button- Tab through fields as follows
    a) Packing Code – Click F1 for menu options. These are raw material CASE options that will determine how the product will be packed. Examples below:
        (1) Bundle 25 – C Flute
        (2) Bundle 15 – BC Flute
        (3) Bundle 30 – B Flute
        (4) Unit – Non bundled
    b) Unit Length – Bypass – used to determine unit length.
    c) Cost/EA – Bypass - used to account for extra costs per unit.
    d) Unit Width – Bypass – used to determine unit width.
    e) Boxes / Code – determines the amount of cartons in a bundle or not in a bundle. There are two options.
        (1) When Bundle is selected in step D-3-A-1,2 or3, then the Boxes / Code will match with the same bundle count.

(2) When Unit (non bundling) is selected in step D-3-A-4, then the Boxes / Code will be 1.

f) Unit Depth – Bypass – used to determine unit depth.

g) Bundles / Pallet – Determines the number of bundles on a pallet. It is dependent on what is selected in both the Packing Code and the Stack code. The estimator is responsible for determining the number of Bundles per Pallet and this may require an override.

h) Wt. / Pack Code – Bypass

i) Pallet# - Delete the field and click F1 for menu options. These are raw material PALLET options that will determine which pallet will be used. Examples below:
   (1) Bale - Unit without a pallet
   (2) Pallet – Standard 48 x 40 pallet
   (3) Pallet n/c – Standard 48 x40 pallet at no charge
   (4) Pallet SW – Standard 48 x 40 pallet with stretch wrap
   (5) Gaylord – Pack out in Corrugated 48 x 40 x 40 HSC and LID
   (6) There are various specialty pallets to choose from as well

j) Length – is the size of the selection in Pallet # field - This pulls from what is in the raw material file for that particular code.

k) Cost/EA – Bypass - used to account for extra costs per pallet.

l) Width– is the size of the selection in Pallet # field - This pulls from what is in the raw material file for that particular code

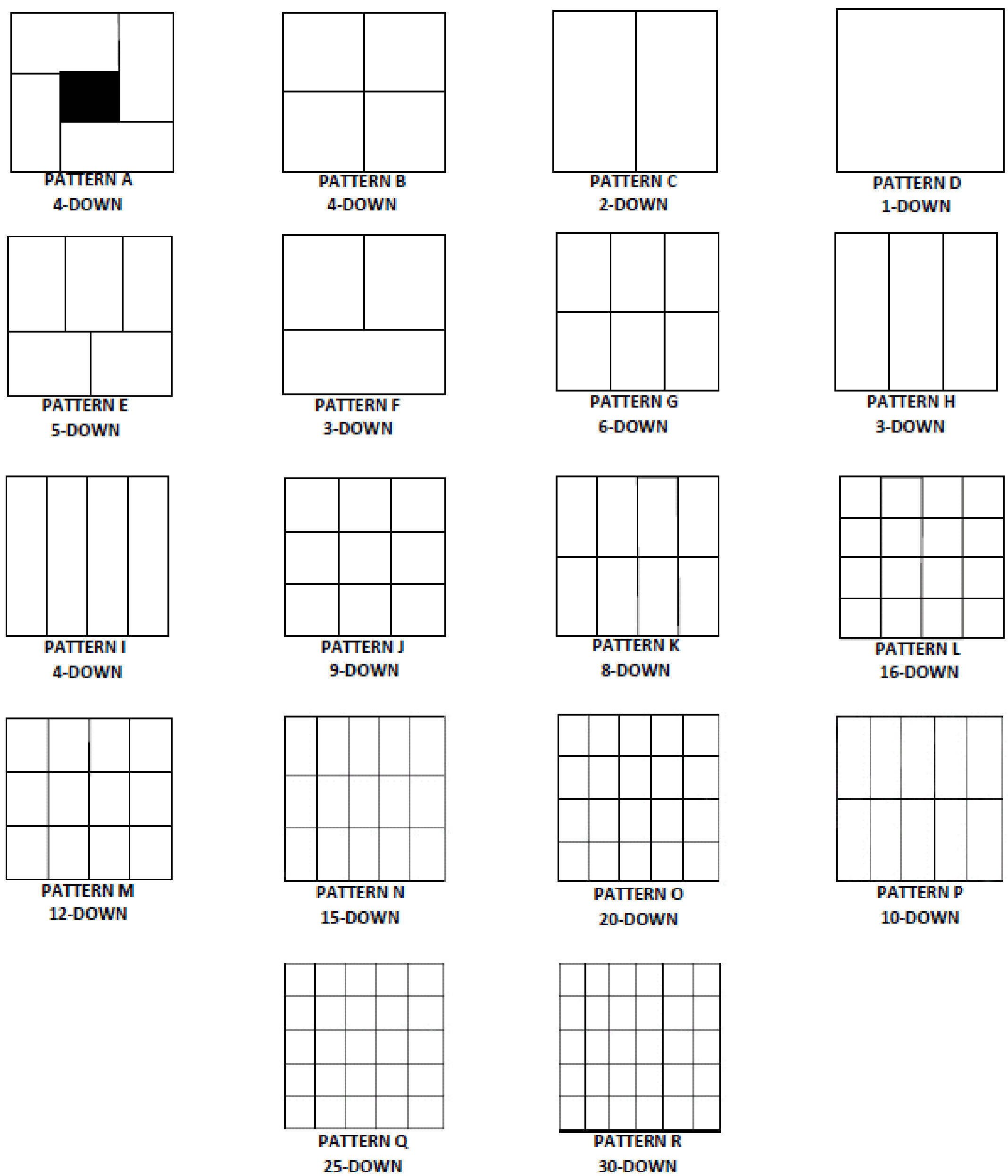
m) Depth – is the size of the selection in Pallet # field - This pulls from what is in the raw material file for that particular code

n) # of Layers – This calculation pulls from the Packing / Code, Boxes / Code and Bundles / Pallet can be changed at estimator discretion.

o) # of Stacks – This calculation pulls from the Packing / Code, Boxes / Code and Bundles / Pallet can be changed at estimator discretion

p) Stack Code – delete field and click F1 for menu options.
   (1) Need to determine the number of stacks that fit within the length and width sizes of the pallet code selected.
   (2) It is important to know that any overhang of the pallet is subjective to customer specifications and should be considered up front.
   (3) A rule of thumb is that a six inch overhang in any direction of the pallet is acceptable. Anything outside of this should be discussed with the customer or sales person.

UNITIZING PATTERNS



q) Freight Charge –. Options include Prepaid, Collect, Bill, and Third Party. Leave Prepaid selected by default.
r) Weight per M - Bypass this field.
s) Carrier - Default should be "TRUCK". Click F1 to choose from list of Carrier codes.
t) Delivery Zone – Default is "1" to cover the Louisville area. Click F1 to choose from an extended list of Delivery Zones. If the zone is not listed, see management.
u) Freight Out / CWT = Weight per 100 of item being estimated- Bypass this field
v) Freight Out / M = Weight per 1000 of item being estimated – Bypass this field.

4. Unit Calc Button – This function pulls in the system defaults for packing. Tab through the fields. These are similar to Override Unit option. Follow previous steps.
5. Copy Button – use to copy INKS, PACKING and FREIGHT. Bypass this option.
6. Job Standards Button - Selecting this option will rebuild existing jobs in J-U-1 to the standards in the estimate file.
7. Stack Pattern Button - shows a picture layout in Microsoft Paint that corresponds to the Letter in Stack Code.

E. PREP / ROUTE TAB - Prep Codes and Machine Codes
1. Prep Codes - Top section labeled Reference information - there is an option list to the right to Add, Save, Reset, Copy, Delete, Cancel and (update) Job Stds.
a) Add – Tab through this section
(1) Code field – must input code from Prep Code information box (click F1). The most common codes selected are:
(a) PRINT CHARGE – generic print plate charge
(b) DIE CHARGE – generic cutting die charge
(2) Input Qty – this should reflect the amount of prep charges that is applied. Typically only one is selected. If more than one prep code is necessary then simply add another prep code line item. Ex. If there are two print plates required then there should be two prep code line items.
(3) Provide a brief description of the prep item. Ex. Could be Rotary Die, Foam Die, Print Plate, Flatbed Die etc…
(4) Input the quoted Cost of the prep item (vendor supplied cost)

(5) Select M/L - Mat/Lab - Valid entries are "M" for material charge and "L" for labor charge. This field dictates which burden percentage from the estimate control file to utilize for calculating the GS&A cost matrix. Since the estimate control file has a cost matrix for material and a separate cost matrix for labor, the code entered here may result in a different cost as part of the full cost per thousand.

(6) Select - SIMON - Valid entries are S,I,M,O,N. "S" indicates that this charge should be billed separately, marked up by the percentage entered and excluded from all costs used to calculate the selling price. "I" indicates that this charge should be included in the selling price. It is marked up the GS&A burden rate in the control file. "M" for maintenance charge, which is included in direct factory cost and marked up by the percentage entered. "O" for other mark up, which is excluded from factory cost, but added to the full cost after the normal GS&A and profit percentages are calculated. "N" for No Charge and No cost, hence this is strictly information for the factory.

(7) Mark up - input the percentage markup - Markup - (6) numeric digits with two decimal positions. This field represents the percentage to multiply the cost of this prep charge. Please note, unless the SIMON code is S or N, then total cost including the markup will be further marked up by other estimate control mark up factors such as General Selling and Administrative (GS&A) markups, warehousing, profit, etc. This markup is best used when billing separately for this prep material.

(8) Amort - Amortize Prep Percentage Enter the percentage of total cost for this preparation material or label that should apply to this quote. Default is 100% however this may be changed. For example, to charge just on half or 50% of the cost on the first job, enter 50. Therefore, only 50% of sell price will be applied to this quote, thus assuming that the prep charge should be charged a second time to the next job.

b) Update – Copy – Delete – these should be used to change what was added if necessary.

c) Job Stds (Job Standards) – Selecting this button updates any jobs for this estimate in the job costing folder J-U-1.

2. Estimate Run Qty Field – in the middle of the screen. This function gives options to Update, Add, Delete newly added quantities and copy from existing quantities.
3. Machine Codes – Bottom section not labeled. There is an option to the right to Add, Add Stds, Import, Override, Build, Delete, Copy, Cancel and Save (save option appears after any other button is used).
    a) Add / Add Standards – Machine Code ADD Button - If a new line is manually entered by using 'add', it is internally marked as a 'manual' line. Thereafter, if the BUILD button is pressed for automatic machine routing, all machines manually entered will be saved and integrated in the newly built machine list.
        (1) Machine Code - Enter the machine code for this department. Click F1 for available options from the machine file. All machines are routed automatically by cross referencing predetermined data in the machine standards file with materials and blank information entered on the estimate. The estimator may add, change or delete machines.
        (2) MRate - This Setup or MR Rate defaults from the MR rate from the machine file. Rates cannot be modified. The make ready direct labor rate is multiplied by the make ready crew size for the total direct labor cost. This cost is added to the variable and fixed overhead rates to determine the machine rate.
        (3) RRate - This defaults to the Run rate from the machine file. Rates cannot be modified. The run direct labor rate is multiplied by the run crew size for the total direct labor cost. This cost is added to the variable and fixed overhead rates to determine the machine rate.
    b) Build / Import - Both buttons will import the machine routing and machine standards. When creating a new estimate or when there are no lines entered in the operations screen, the program will automatically build a machine routing.
        (1) IMPORT Button - When updating a line, the Make Ready & Run speeds will be retrieved from the machine standards file. It defaults to the system standards.
        (2) OVERRIDE Button - The values manually entered will be kept as is. This is an override of the system standards. Most typically used to adjust for machine run speeds. ***CAUTION: In the event it is ever updated by import it will negate any overrides that were previously entered.***

(3) Assembly Time studies should be conducted in one of the following three formats:
   (a) Assembly has competitors samples and conducts the stop watch formula, 50 minute hr, - 10% fatigue factor.
   (b) Assembly has CAD table proto type and conducts the stop watch formula, 50 minute hr, - 10% fatigue factor.
   (c) Assembly does direct comparison to known similar item.

c) Delete, Copy and Cancel are used accordingly to adjust machine routings.

F. MISC / SUB TAB – Miscellaneous / Sub Contract
   1. Sub-Contract, Farm-Out, and Misc. Cost - There is an option list to the right to Update / Save, Cancel and Copy. These options apply to both the upper section labeled Sub Contract, Farm-Out and Misc. Cost and the lower section labeled, Special Materials Item#. Tab through the following selections, click update then save.
      a) Click update on S/B. Enter the form/sheet and enter the blank number for which this cost applies. Default is 0.
      b) Misc. Costs -The description is a manually entered material or sub-contractor job. It shall reference the vendor or cost type such as additional labor, handling charges etc.
      c) Mat’l/SU – (Material Set up charge per thousand). The cost may be applied at a fixed price or per thousand rate for any of the make ready and run costs either for labor and/or material. The cost will be multiplied per blank or per sheet depending on the S/B selection.
      d) Labor/SU – (Labor set up charge per thousand). The cost may be applied at a fixed price or per thousand rate for any of the make ready and run costs either for labor and/or material. The cost will be multiplied per blank or per sheet depending on the S/B selection.
      e) Mat’s/M – (Material cost per thousand). The cost may be applied at a fixed price or per thousand rate for any of the make ready and run costs either for labor and/or material. The cost will be multiplied per blank or per sheet depending on the S/B selection.
      f) Labor / M – (Labor cost per thousand). The cost may be applied at a fixed price or per thousand rate for any of the make ready and

run costs either for labor and/or material. The cost will be multiplied per blank or per sheet depending on the S/B selection.

g) SIMON – Valid entries are S,I,M,O,N.
   (1) "S" indicates that this charge should be billed separately, marked up by the percentage entered and excluded from all costs used to calculate the selling price.
   (2) “I” indicates that this charge shall be included in the total cost of the estimate.
   (3) "M" for maintenance charge, which is included in direct factory cost and marked up by the percentage entered.
   (4) "O" for other mark up, which is excluded from factory cost, but added to the full cost after the normal GS&A and profit percentages are calculated.
   (5) "N" for No Charge and No cost, hence this is strictly used as information for the factory.

h) Mark up - An additional markup percentage may be added to the cost. Mark up with two decimal positions. Enter a mark up percentage for this special cost.
   The system will separate material cost from labor cost prior to adding the general selling and administrative (GS&A) markup rates defined in the estimating control file. Please note, the costs defined here do not vary by estimate quantity. This is very important to remember when entering a total cost for material or labor. ASI recommends that the fixed prices be used as a setup charge and the cost per thousand be used.

2. Special Materials Item# - There is an option list to the right to Update / Save, Cancel and Copy. These options apply to both the upper section labeled Sub Contract, Farm-Out and Misc. Cost and the lower section labeled, Special Materials Item#. Tab through the following selections, click update then save.
   a) Special Materials Item# - Enter a RM Item Number -. Raw materials with material type = "M" is entered and will calculate the total cost based on run quantity utilizing the cost per unit of measure from the raw material file.
   b) Description – the description transfers automatically from the raw materials file.
   c) Qty/FG - Enter the number of pieces of this material required to make one finished good item. The cost is defined in the raw materials vendor cost matrix. Enter a ratio for the material when less than one is consumed to produce one finished good item.

G. BOX DESIGN TAB

1. This section has options across the bottom of the screen to Update, Save, Cancel, Rebuild, Die, CAD/2D, 3D Image and Graphic. Tab through the selections. The cancel button can be used throughout the selections.
    a) Click Update.
    b) Design # - this is associated with the style file entered under the estimate tab (Reference I-A-9). .
    c) Image file – this is associated with the style file entered under the estimate tab (Reference I-A-9). It can be updated by selecting a different image from the RCODE folder located on Premier Packaging's server. Here is the path to access it.

    d) Length / Width dimensions – allows override of the default scoring.
    e) Save updates.
    f) Rebuild – This option will create the following prompts:
        (1) Rebuild 'S'cores Only, 'I'mages Only, 'B'oth, or 'N'either? This requires selection of a letter S,I,B or N. Give answer that best suits your rebuild requirements.
        (2) This Process will erase any changes, are you sure? Answer Yes or No.
    g) Die button - references die image file not currently in use.
    h) CAD/2D button - click this and Microsoft Paint will open allowing changes to the Image selected by the style default which is the same image file under the RCODE folder.
    i) 3D Image button – This will reference the 3D file associated with the style file.
    j) Graphic button – There are two prompts. If the estimate that has not been converted to a finished good it will issue an error claiming No FG Item# entered… If the estimate has been converted to a finished good it will ask a question, No graphic Image entered. Would you like to enter it? If Yes, then it will ask for the path and name of the Image File. Enter it and click OK.

H. PRINT TAB

1. This tab is for generating estimate calculations. This section has options across the bottom of the screen to; What If / Save, Cancel, Delete, Item, View, Hard Copy, Quote, mport Price, Calculate, Print Box and Sample. Tab through the selections. The cancel button can be used throughout the selections.
    a) What if /Save button- Tabbing through the end of the selections will automatically prompt the save option. You can save at

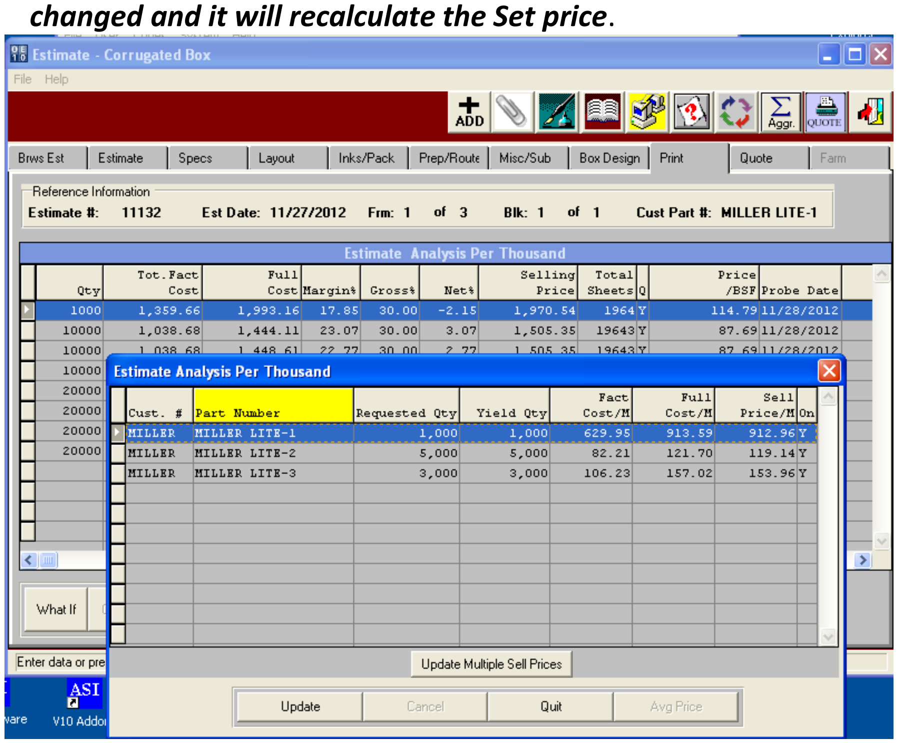
anytime during the "What if" process. The button allows override of the following:

(1) Gross% - Gross profit percentage
(2) Net% - Net profit percentage
(3) Selling Price - Price for customer
(4) Q - Means whether item is quoted, yes or no. Options are "Y" and "N"
(5) Board% - Board profit percentage
(6) Board Contrib / M – Contribution dollars per thousand
(7) Board Contrib$ - Contribution dollars per order
(8) CM$ - Contribution Margin Dollars.
(9) CMAH - Contribution Margin Assembly Hours (feed type = "A" only. This is a setting in each machine file)
(10) CMOH – Contribution Margin Other Labor Hours (feed type ≠ "A")

b) Cancel button - Can be used once another button is selected. Will default to start of process.

c) Delete button – This will delete the selected line item entirely.

d) ***Item button – This button is for SET estimate or Estimate of Combo item on a sheet. The PRINT folder shows the price of the Billable item. ITEM button shows the price and cost of each part selected. Select a quantity and then select ITEM. It shows the quantity of each component of the SET. Component price can be changed and it will recalculate the Set price***.

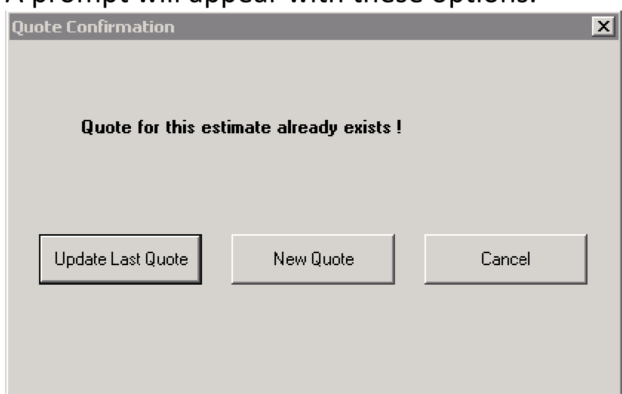


e) View button – presents a view of the estimate and all of it detail in print ready format. This option will print all pages of the estimate document.

f) Hard Copy button – is a direct print option. This option will print the main page and the notes page. It will not print the spec page(s).

g) Quote button - This button will:
   (1) Create a quote for the first time,
   (2) Present options to update last quote
   (3) Cancel.

   A prompt will appear with these options.



h) Mport Price button - Imports the Sell Price from the Last QUOTE. So if you calculate a new quantity,Press Import. The last sell price from quote file will be inserted.

i) Calculate button - PURGE VS. APPEND
   (1) Purge – recalculates the QTY's of the estimate. It can only be selected and or used if there has been a previous calculation. A prompt will ask you to select from a list of board vendors, one of which is always generic. Click OK, Best Price or Cancel.
      (a) Clicking OK or Best Price will take you to the estimate analysis screen. You will have options to reset or update the estimate quantities.
      (b) Under Selection there will be additional options to check:
         (i) Recalc Machines' Speed, Spoil%, & Waste%? If the box is checked then the calculation function will pull in the default parameters from the system machine files. If it is not checked then any overrides for speed, spoilage and waste will not be recalculated.

(ii) Recalc Machines' MR-Hrs? If the box is checked then the calculation function will pull in the default parameters from the system machine make ready (set up) files. If it is not checked then any overrides to make ready (set up) hours will not be recalculated.

(iii) Override GS&A and/or Warehouse percentages? (GS&A = general sales and administrative). If the box is checked then warehouse charges will be added to the estimate. This option is used for warehouse accounts. If the box is unchecked then the warehouse charges will not apply and this option is used for run and ship estimates.

(iv) Drop Slitter if MSF > Minimum? Skip this option – do not check the box.

(v) Calc board cost on blank? Skip this option – do not check the box.

(vi) Click OK or Cancel. Clicking OK will take you to the GS&A Detail only if the GS&A option was checked. The GS&A Detail screen is where warehouse mark up % can be applied. Add the default 4.3% to the warehousing mark up % box and click OK again. This will continue the calculation of the estimate. If the GS&A option is unchecked then clicking OK will bypass the GS&A Detail and continue calculating the estimate.

(2) Append to existing QTY's – This option will perform the same steps as Purge. The difference is that it will not purge previous estimate QTY's and prices. It will add to the estimate analysis and can normally be differentiated by a new probe date. The appended QTY's will appear in numerical order in relation to previous estimated QTY's.

j) Print button – displays image file of the style file selected. This is a generic style file generated from ASI.

k) Sample button – Skip -This is a mod for another ASI client. It is mainly used for partitions. N-K-1 settings – CESAMPLE.

I. QUOTE TAB

1. This tab shows the quote maintenance screen. The menu location for this is E-Q. The estimate has direct access to this location. This tab contains five other tabs which are :
   a) Browse Quotes - This is a list for all quotes associated with the estimate when the tab is accessed from within the estimate. If the browse quotes tab is accessed via E-Q then it will display whatever search parameters are present.
   b) View Quote – This tab contains the quote #, date, estimate # , status, customer information, sales rep etc. It has a row of buttons 1-7 in the middle of the page and a column of buttons 8-11 that allows you to do the following options:

Top Section of View Quote Screen

(1) Update / Save – this allows update of the upper section of the quote and the following fields; Quote date, estimate #, RFQ #, delivery date, Contact, Customer ship to, Customer sold to, Sales Rep, Terms, and Delivery Zone. Save can be used at anytime once the update button is initiated.

(2) Reset – will reset the quote to its original estimate parameters and can only be used if the Update button has been initiated.

(3) Add – Can create a brand new quote from scratch. ***This is not recommended to do from within an estimate***. ***This function applies to creating quotes from E-Q.***

(4) Copy - will allow changes to these fields; quote date, delivery date, contact, Customer ship to, and Customer sold to. The next step would be to save. The quote is copied to a new quote number. This will display side by side with the other quote on the browse tab screen.

(5) Delete – This button will prompt with a question box that asks, "*Delete Currently Selected Record*"? Yes or No. Answering "Yes" will delete the record and "No" will return to previous quote screen.

(6) Cancel – can only be used when Update, Add or Copy are in use. The cancel option will return to original screen information.

(7) Print – this button will prompt a Print Quotes parameter box. The print quotes prompt will allow printing of original

quote as well as combining multiple quotes into one. It prints all relevant information from the estimate, such as quantities, prices, notes, descriptions, customer part numbers etc..

Bottom Section of View Quote Screen

(8) Update / Save - this button allows changes to the lower section; Item Description, Item Description 2, Dimensions, Board and Color. Save can be used at anytime once the update button is initiated.
(9) Add - this button adds another line item. Note: it must be an existing part number and can be selected from the F1 menu screen. Selecting fromF1 will populate the data in the line item.
(10) Delete - This button will prompt with a question box that asks, "*Delete Currently Selected Record*"? Yes or No. Answering "Yes" will delete the record and "No" will return to previous quote screen.
(11) Cancel – can only be used when Update or Add are in use. The cancel option will return to original screen information.

c) Quantities – this tab displays Quote #, Customer Part #, description, Style code and a table with quantities. Below the table is a row of buttons used for adjustments. They are as follows:
(1) Update / Save – this button allows changes to all options except Total MSF and quoted by. Save can be used at anytime once the update button is initiated.
(2) Reset – will reset the field you are in to its original quoted state. It can only be used if the Update button has been initiated and you have changed the fields to begin with. It will reset data to the last saved data.
(3) Add – this adds another Qty line item. ***This is not recommended for use as all fields must be calculated manually. The cost fields do not import from the estimate.***
(4) Copy – this will copy line item to a new line.
(5) Delete - This button will prompt with a question box that asks, "*Delete Currently Selected Record*"? Yes or No. Answering "Yes" will delete the record and "No" will return to previous quote screen.

(6) Cancel – can only be used when Update, Add or Copy are in use. The cancel option will return to original screen information.

(7) Reprice – this button will prompt with a question box that asks, "Are you sure you wish to Reprice this quote"? Yes or No. Answering "Yes" will prompt the Quote Reprice Option screen. This screen has five (UOM) units of measure to choose from. Must select EA, M, MSF, CASE, LOT or "X" out. By selecting one of these UOM will convert the current line UOM and price. Answering "No" will return to previous quote screen.

d) Prep/Misc Chg - this tab in quote maintenance is populated from the prep route tab in estimating. This tab displays Quote #, Customer Part #, description, QTY and a table with prep charges. Below the table is a row of buttons used for adjustments. They are as follows:

(1) Update / Save – allows changes to all options. Save can be used at anytime once the update button is initiated.

(2) Reset – will reset the field you are in to its original quoted state. It can only be used if the Update button has been initiated and you have changed the fields to begin with. It will reset data to the last saved data.

(3) Add – this button will add prep/misc charge line item to the quote.

(4) Copy - this button will copy from existing prep/misc charge to a new line item.

(5) Delete - This button will prompt with a question box that asks, "*Delete Currently Selected Record*"? Yes or No. Answering "Yes" will delete the record and "No" will return to previous quote screen.

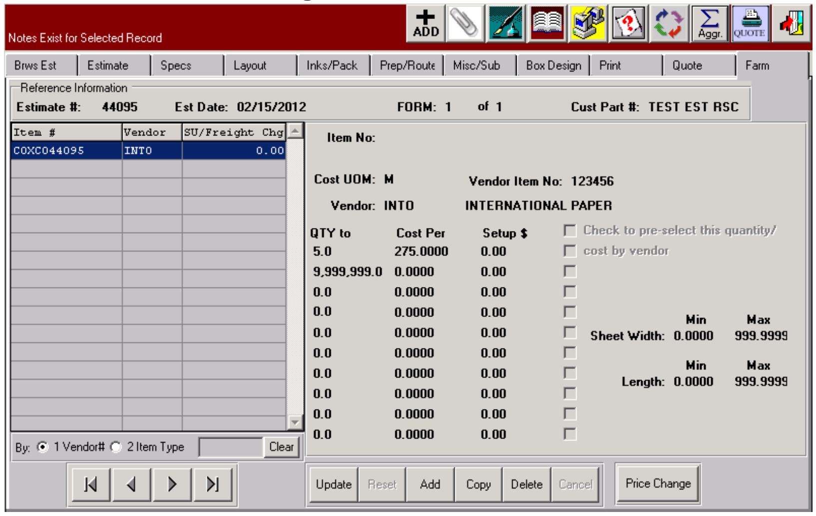
(6) Cancel – can only be used when Update, Add or Copy are in use. The cancel option will return to original screen information.

e) Notes – this tab displays Quote # and Quote Date and a section to type information that will appear on the formal quote. Click Update / Save to add note(s) and or Cancel. To remove an added note, click update and delete the note.

J. FARM TAB

1. This tab can only be used if the estimate is for purchased goods and the "P" option has been selected in the estimating tab (See section A-22). This tab shows Estimate #, Estimate date, Form, Cust Part#, a table for vendor costs (which is sortable by vendor # or item type) and a section to add cost by vendor with a row of buttons beneath it. The buttons are:
    a) Save – It cannot be used until the Add button or Copy button has been initiated. It will save the file.
    b) Reset – It cannot be used unless the Add button or Copy button has been initiated. It will reset the field you are in to its original quoted state. It can only be used if the Update button has been initiated and you have changed the fields to begin with. It will reset data to the last saved data.
    c) Add – this button will prompt the following fields to be populated.
        (1) Cost UOM: Click F1 to bring up a list of options for units of measure (UOM). Select a UOM from the following options:
            (a) BDL – Bundle
            (b) C – One Hundred
            (c) CS – Case/Pallet
            (d) EA – Each
            (e) L – Lot
            (f) LB – One Pound
            (g) M – One Thousand
            (h) MSF – Thousand Square Feet
        (2) Vendor – enter the vendor code or click F1 and select the vendor from the vendor information folder.
        (3) Vendor Item No. – this field should be populated with the vendor's quote number or item number. (***This is often on the quote from the vendor)***
        (4) QTY to – enter QTY based on the UOM selected. For example: if EA is selected and the quote amount is for 5000 cartons, enter 5000. Conversely if the M is selected and the same amount is quoted, then enter 5.0, not 5000. After the last quoted line, enter the following line with all 9999999's.
        (5) Cost Per – enter cost per based on the UOM selected. For example: if EA is selected and the quote cost is $275.00, enter $.275. Conversely if the M is selected and the same cost is quoted, then enter $275.00. After the last quoted

line, enter the following line cost as zero.



(6) Setup $ - enter set up charge from the vendor when applicable. This is typically driven by low qty's, print changes or special runs.
(7) Sheet Width and Length Minimum and Maximum. Enter if known or bypass this section.
(8) Save – this will create a record by vendor which is located in the table on the left side of the screen.

(d) Copy – This button will copy from a vendor record in the table to the left. Update the fields as if you were adding a line item.
(e) Delete – this button will delete a vendor record from the table to the left.
(f) Cancel – It cannot be used unless the Add button or Copy button has been initiated. This button cancels the update.
(g) Price Change – this button will prompt with a question box: Message Update – By what Percentage. Input the percentage and click enter. It will update the Cost Per field by the percentage entered. Enter as whole percentage. Ex. 5% = 5.00.

PROCESS: **<u>STEPS TO BUILD A SET HEADER ESTIMATE</u>**

2. Enter E-C from the Main Menu – ESTIMATING / QUOTES – CORRUGATED BOX ESTIMATE

   A. ESTIMATE TAB click "ADD" button / icon at the top of the page.

      1. Select "SET ESTIMATE" button
      2. An estimate number will populate the *Estimate #* field.
      3. Enter CUST# / code. If customer is unknown, click F1 and select from the Customer information search field. **MUST HAVE CUST# IN ORDER TO BUILD ESTIMATE.**

4. The SET INFORMATION box will prompt and will ask for the Set FG Item#, Set Cust Part#, Item Name, Part Description, Category, FG Length, Width, Depth and the appropriate Set Allocation: See set allocations below.
   a) Assembled – means the item will be assembled and pull component parts from inventory upon finished good receipts.
   b) Unassembled – means that the item will be shipped to the customer as components but billed as single set item.
   c) Assembled w/Part Receipts – means the item will be assembled and will allow receipt of finished good to inventory even though the component inventory required is incomplete.
5. Complete the Set Information fields as follows:
   a) Set FG Item# - Enter Cust code + the estimate number + SH.
      (1) Example – COXCO47865SH
   b) Set Cust Par# - duplicate the Set FG Item#
      (1) Example – COXCO47865SH

      The reason we duplicate the Set FG Item# is this. If we have more than one customer with the same Customer part number it could cause the system to confuse one part for the other regardless if it is a single item estimate or a component part of a set header. Therefore we make each one as unique as our Finished Good #.
   c) Item Name – enter the item name or customers part number.
   d) Part Description – Duplicate Item name.
   e) Category - will always be "FOMFG" for Set Headers
   f) FG Length, Width & Depth – skip or leave as zero.
   g) Select Set Allocation based on descriptions in II-A-4-a,b,c)
6. Always select unitize which is the final option of the Set Information prompt.
7. Select Save to exit the Set Information Prompt.
8. Notice that the system automatically created CUST PART# for the first component to COXCO47865SH-1. It will create a new customer part number for each component added.
9. Finished Good Item field. Create the component name. Example COXCO47865SH-1 – meaning it is component # 1. Repeat with new number for each additional component of the SET.
10. Repeat Steps from SINGLE ITEM ESTIMATE - I-A-8 Thru 24 to complete the component entry.

I. Repeat SPECS TAB - Section 1-B
J. Repeat LAYOUT TAB - Section 1-C
K. Repeat INKS / PACK TAB – Section 1- D. There is one exception. Section I-D-3i – must select Pallet N/C = pallet no charge for each component of the Set. The SET HEADER unit count is input by clicking the far left arrow. . This is in the bottom left corner of the screen. It is on form # 0 which is the unitizing

information for the SET HEADER. It is across the top of the screen and looks like this Frm: of 2 Blk: 0 of 0 (forms are determined by the amount of components in the estimate).

L. Repeat PREP / ROUTE TAB – Section 1- E. Note that the last component added to the SET shall have "ASSEMB" machine added as the last routing under the last form #. This is the assembly rate per hour for the Set and a time study is mandatory.
M. Repeat MISC / SUB TAB – Section 1-F. Use this to capture special raw material or sub contracted costs.
N. Repeat BOX DESIGN TAB – Section 1-G
O. Repeat PRINT TAB – Section 1-H
P. Repeat QUOTE TAB – Section 1-I
Q. Repeat FARM TAB – Section 1-J when a component is purchased instead of manufactured. Ex. Assembled partitions.
R. END.

FORMS:

- E-C – Hard Copy of Estimate
- E-Q - Quote

RELATED INSTRUCTIONS:

- Premier Packaging Machine Limitations Manual version 2013
- EST# 44095 – single estimate
- EST# 47865 – set estimate

Advantzware 2012 Help Files

- CORRUGATED BOXES, SETS, FOAM, FARMOUTS BROWSER
- ABOUT THE BROWSER - The browser screen shows all the existing estimates in the system starting with the most recent and descending to the oldest. To view the first/last estimate, press the END key or HOME key or click the icon with the circling arrows to sort ascending, then descending. PLEASE NOTE, click the brown bar then press [F3] to view the browser help or click on an estimate line, then press [F3] to view the estimate help. Also, the implementation sequence help may be reviewed from the main menu by clicking the estimate menu, then press the [F3] key.

- SCROLL BARS - Information is displayed to the right and below the normal screen size, hence the up/down and left/right scroll bars will move the screen to the far right or back to the left and also further down the screen. Alternatively, you may press the arrow keys to move up or down the screen. You may also, press the page down or page up keys, home key, end key or the icon with the arrows.

- SEARCH FIELDS - The white field blocks are used for selecting the estimates by estimate number, customer code, customer part number, finished good item code, style and box length. Simply click the field that you wish to sort upon, then press the type a few letters and the program will limit the search based on the exact match of the keystrokes entered. For Example, click the CUST# radio button, and then type Smith. A list of companies starting with Smith appears on the browser. Double click a particular estimate or press the down ARROW key to select a company. Click on any option and the list will be sorted by that field value.

- + ADD ICON - The top of the window has a + icon which places you directly into the add mode of estimating to add a brand new estimate. See help for the estimate folder for more information on adding and changing estimates.

- FOUNTAIN PEN ICON - This icon looks like a fountain pen and is used for adding notes for each machine department, which are printed on the job ticket. Department notes may be defined in the customer file, which will transfer to any newly added estimate. This may be very useful for ISO9001 or quality control notes. Each note is date and time stamped and notes may be entered for each form number for each department code. The Form number 00 will be used as general notes for a department. Miscellaneous departments such as QC for quality control notes may be added to the estimate maintenance department file.

- BOOK ICON - The fountain pen icon is used for adding specification notes for a finished goods item. Specification codes such as CS for customer service notes that have been added to the system administration specification codes file may be added to any item on an estimate. These notes may be reviewed during estimating and order entry.

- COMPUTER LIGHTING BOLT ICON - This allows access to any other menu options in the Advantzware system. Each user may define their own unique menu in the system administration user file maintenance file.

- QUESTION MARK ICON - This is our on line help for each screen and each field in our system. The [F3] key will also provide the same help key. To view help on a particular screen, make sure that you mouse click inside the screen that you want help. This will ensure that the focus is pointing to that screen.

- ARROWS ICON - Same function as the Home and End keys, which display the last record or first record respectively.

- AGGR. FRACTION - This icon shows a chart converting fractions to decimals. The [F10] key will provide the same chart.

03-WI-18 03-WI-18 Estimate Work Instruction - VER 2

REVISIONS:

7-16-2013	Updated with the process on Assembly submitting time studies for new item quotes.

REVISIONS:

12/26/2012	Initial release
2-21-2013	Set Header instructions added.
5-24-2013	Table of Contents added

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