

Training Manual

Overview

E-Turbo Quote is a cost development tool. This web-based, interactive tool is expert based and automates many functions of cost estimating without adding the complexity of high end, movement based cost estimating tools.



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Advantages

Primary advantages over manual or spreadsheet based pricing development systems.

- We are web-based, giving you access to your data whenever you have access to the web. Backups are automatic, your team doesn't have to remember to do anything.
- Cost data and product parameters are held in separate databases, meaning that when your costs change, new price models are generated instantaneously.
- Pricing templates, or standard cost models, allow you to quickly create and edit estimates based on previous experience.
- It's fast and robust. Multiple team members can work on price models, saving effort and time spent looking for data.
- You can attach all your files to the cost estimate, eliminating searching through 1000's of computer files.



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The Basics

		Pr	icing Devel	opment Tool	le		
Dashboard for E Turb	Tools Product	Price Model	Customers	Data Tables	Users	Reports	Logout
Quotes		Custor	ners		Data	Packages	
Quotes Not Started: Quotes In Progress: Finished Quotes:	20 19 2	Total Cu	stomers:	4	Labor Matl T Purch	Tables Updated ables Updated: Items Updated:	2013-08-21 2013-08-21 2013-07-30
Total Quotes: Oldest RFQ:	41 2012-12-08						

- The dashboard provides statistics of your overall progress on the cost estimates which are in your system.
- The top navigation bar will appear on all pages, allowing users to quickly move between pages.



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Getting Started – Customers



Pricing Development Tool

Dashboard for E Turb	o Tools	Product Price Model	Customers	Data Tables	Users	Reports	Logout
Quotes		Custor	Add a New Cu Add a Produc	istomer t Line to an Existing	g Customer	'ackages	
Quotes Not Started: Quotes In Progress: Finished Quotes: Total Ounter:	20 19 2	Total Cu	Add a Contac Correct Data i Delete Custor	t Name to an Existi in the Customer Da ner Data	ng Customer stabase	<u>(bles</u> Updated: <u>des</u> Updated: <u>ms</u> Updated:	2013-08-21 2013-08-21 2013-07-30
Oldest RFQ:	2012-12-	08					

eTurboQuote is a series of databases. Getting started means creating your databases. Without customers, it makes little sense to do product / service cost estimates, so we'll start by adding a customer to our database.

Choose the Customer tab, then select Add a New Customer.



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Getting Started – Customers

Add a New Customer

Company Name:	
Main Phone:	
Website:	
Address 1:	
Address 2:	
City:	
State:	
Zip:	
Account Number:	
DUNS Number:	
Status:	
Add	a Customer

Fill in as much (or as little) information as you'd like. The only required field is the Company Name. Keep in mind that what you type is what is in the database, so spell the customer's name correctly. Don't worry though, you can always come back and fix it later.

You aren't limited to entering only actual customer names. You can enter what you like, such as "Cash Customers" or "Spring Catalog".

You can enter customers one at a time, or all at once.



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Getting Started – Customers Product Lines



Pricing Development Tool

Dashboard for E Turb	o Toois	Product Price Model	Custom	ers	Data Tables	Users	Reports	Logout
Quotes		Cust	omers		Add a	a New Custon a Product Line	er a to an Existing	Customer
Quotes Not Started: Quotes In Progress: Finished Quotes:	20 19 2	Total	Customers:	4	Add a Corre Detet	a Contact Nar act Data in the re Customer D	ne to an Existir e Customer Da Data	ng Customer tabase
Oldest RFQ:	2012-12-	08						

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Choose the Customer tab, then select Add a Product Line

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Getting Started – Customers Product Lines

Add a Product Lin	e
Choose Customer:	First Class Bakery
-Product Line-	Add Product Line

Product Lines are included to help index and manage your estimates. Product Lines can be anything you want them to be, but try to make them something you can remember.

Before you can complete a cost estimate, the customer <u>must</u> have at least one product line assigned. If you are running a bakery, examples could be cakes, pies, bread, etc.



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Getting Started – Customers Contact Name



Pricing Development Tool

		1		Add a N	vew Custom	er		_
Quotes		Customers		Add a F	Product Line	to an Existing	Customer	
Quotes Not Started:	20	Total Customers: 4	4	Add a C	Contact Nam	e to an Existin	g Customer	21
Quotes In Progress:	19			Correct	Data in the	Customer Dat	tabase	11
Finished Quotes:	2			Delete (Customer D	ata		0
Total Quotes:	41			- Solette			-	
Oldest RFQ:	2012-12-08			I				

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Choose the Customer tab, then select Add a Contact Name

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Getting Started – Customers Contact Name

hoose Customer: Firs	t Class Bakery
Add to Contact List	
Name:	
Phone:	
Cell:	
E-mail:	
Int Address:	
Address 1:	
Address 2:	
City:	
State:	
ZIP Code:	

This is for you. As time goes by, your database is likely to grow large. Listing your contact's name and information will make it easier to find individual proposals or quotes years from now.

As before, enter as little or much info as you like. All that is required is the contact name.

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Pricing Development Tool

					Add a M	New Custom	er		
Quotes		Custon	ners		Add a F	Product Line	to an Existing	Customer	
Quotes Not Started:	20	Total Cus	stomers:	4	Add a (Contact Nam	e to an Existin	g Customer	1
Quotes In Progress:	19				Correct	t Data in the	Customer Dat	abase	:1
Finished Quotes:	2				Delete	Customer D	ata		:0
Total Quotes:	41				Coloro	oustornier D	unut -		
Oldest RFO:	2012-12-08								

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To edit existing customer entries, choose the Customer tab, then select Correct Data



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Edit Data

- Edit Customer Details
- Edit Product Lines
- Edit Contacts

Select the radio button that corresponds to the area where you would like to make changes!

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Edit Customer Data	
Choose Customer:	First Class Bakery 💌
Company Name:	First Class Bakery
Main Phone:	
Website:	www.1stclassbakery.com
Address 1:	
Address 2:	
City:	
State:	
Zip:	
Account Number:	
DUNS Number:	
Status:	
Make	e Changes

EDIT CUSTOMER DETAILS

From the drop down list, choose the Customer name that you would like to edit.

Type in the new information and click on the Make Changes button.

Notice the Green checkmark confirming a successful change.



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hoose Customer:	First Class Bakery 💌	
Pies 1234567890	•	
Revised PL:	Creme Pies	
Make Changes	0	

EDIT PRODUCT LINES

From the drop down list, choose the Customer name that you would like to edit.

From the second drop down list, choose the product line you want to change.

Type in the new information and click on the Make Changes button.

Notice the Green checkmark confirming a successful change.



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Edit Contacts:	
Choose Customer: First	Class Bakery
Choose Contact: Ima	⁵ ielover ▼
Revised Contact Info:	Ima Pielover
Phone:	
Cell:	
Email:	
Int Address:	
Address 1:	
Address 2:	
City:	
State:	
Zip:	
	Make Changes

EDIT CONTACTS

From the drop down list, choose the Customer name that you would like to edit.

From the second drop down list, choose the contact name you wish to edit.

Type in the new information and click on the Make Changes button.

Notice the Green checkmark confirming a successful change.



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Getting Started – Customers

Deleting Entries



Pricing Development Tool

Dashboard for E Turb	o Tools	Product Price Mode	I Custon	nens	Data Tables	Users	Reports	Logout
Quotes		Cus	tomers			D	Add a New Cus Add a Product Add a Contact	tomer Line to an Existing Custome Name to an Existing Custom
Quotes Not Started: Quotes In Progress: Finished Quotes: Total Quotes:	20 19 2 41	Tota	Customers:	4		La M Pa	Correct Data in Delete Custom	the Customer Database
Oldest RFQ:	2012-12-	08						

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To delete customers, choose the Customer tab, then select Delete Customer Data. We won't allow you to delete any customers that have cost estimates assigned.

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Getting Started – Customers

Deleting Entries

Delete Data			-1
Customer	Product Lines	Contacts	
× Abe's	🗡 Test		
⊁ First Class Bakery	 Bread Cake Creme Pies Pies 	X Ima Pielover	
X New "Bakery"		🗙 "Alsop's"	
× Time Works	× Casters	× Tom B	
× time works			

Just click on the \mathbf{X} to delete an entry. The light colored X is not selectable. You won't be able to delete these entries because they are included in a cost estimate.

If you delete a customer, all of the product lines and contacts associated with that customer are also deleted!





Getting Started-Labor Rate Tables



Pricing Development Tool

Dashboard for E Turb	o Tools	Product Price Model	Customers	Data Tables	Users	Reports	Logout
Quotes Quotes Not Started: Quotes In Progress: Finished Quotes: Total Quotes:	20 19 2	Custor Total Cu	ners stomers: 4		Data Labor Matl T Purch	Packages Tables Updated ables Updated: Items Updated:	Labor Rate Tables Material Cost Tables Purchased Part Tables Import From CSV Export To CSV
Oldest RFQ:	2012-12-	C 2012 cTurbe Te	ools incomprated. A	l world wide rights re	served		

Labor rate tables contain the costs and overhead for each work station, department or cost center. In small operations, these can be detailed to individual employees.

Labor costs are broken into direct labor, variable cost, and fixed cost.

To enter the Labor screen, go to Data Packages and select Labor Rate Tables.



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Getting Started-Labor Rate Tables

shboard for E Turbo T	ools Product Pri	ice Model Ca	istomers Dal	la Tables Us	ers Reports	Logout
or Table						
Operation	Labor S	Fixed OH Ratio	Var OH Ratio	Total OH Ratio	Last Changed	Enabled
Roller	22.00	2,10	2.00	4.10	2013-08-21	
Mixer	15.00	2.10	2.50	4,60	2012-12-29	N
Baker	20,00	2.10	2.00	4.10	2012-12-29	
Test 3333	12.00	1.20	1,12	2.32	2013-06-06	
Forming	13.00	1.00	1.00	2.00	2013-06-05	
	1			1		

The bottom set of boxes is used to add a new Operation. Once done, click on the add icon **b**. The Fixed and Var OH are entered as ratios of the Labor \$. If you enter 1.00 in the Fixed OH box, the tool will assign a fixed cost equal to 1.00 times the Labor \$.

To change labor or overhead rates, select the data you wish to modify. Once changed, the box will turn yellow. To save the change, click on the file icon . The last changed field records the modification date to help keep you organized.

We won't allow you to delete an operation that is used in an estimate, but if you don't enable it, it won't show up in the drop down menus for new estimates.



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Material cost tables contain the details of costs and specifications for raw materials that are purchased and used in the manufacture of your product or the performance of your service.

Generally speaking, raw materials differ from purchased parts in that purchased parts are used as is, but raw materials are transformed into other products.

Examples of raw materials are steel sheet, plastic pellets for injection molding, concrete ingredients, and thread.

To enter the raw materials screen, go to Data Packages and click on Material Cost Tables.

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A word to the wise – eTurboQuote is very flexible, it will let you enter your data the way you want it. But you won't like it much if you are not consistent in your entry methods. Think through how you want to set-up your material cost tables, then stick with it. We are experts at this, if you want our help, just give us a call or drop us an email.





					. N	laterial Ma	inageme	nt Tool					
_		Dashboard fo	r E Turbo Tools	Produc	t Price Model	Custon	nera	Data Tables	Users	Reporta	Logout		
Add N	lew Material												
Flour	Mati	Туре	Size	Gauge	SPEC	Cost	Weight	Unit	Cons Op	Cons Rate	Comment	Date	Enabled
2%	Flour	Self Rising	0 lb Bag	-		0,130	4.2000	C		0	Test on 02/36/2013	2013-07-25	1
2%	Flour	White	10 Pound Bag			0.195	1.0000	(b)		0		2013-07-25	IV.
2%	Flour	White	PortCup			0,062	4,2600	C		0		2013-07-25	10
Pruit	ana an		1.000		2.9512.04			or some s					
	Mati	Туре	Size	Gauge	SPEC	Cost	Weight	Unit	Cons Op	Cons Rate	Comment	Date	Enabled
14	Fruit	Apple	Cup			0.830	0.3333	c		0	Price per Cup d Granny Apples	2013-06-11	17.
2%	Fruit	Cherry	Cup	NIA.	Tat	0,970	0.3333	с		0	Estimated	2013-06-06	12
24	Fruit	Peach	Gup			1.651	0.3333	c	Roller	25	Estimated	2013-06-10	R

The material table groups entries by the Matl category. It is then sorted by Type, Size, Gauge and SPEC. In the example above, you would read that Flour – White – 10 lb Bag costs \$.195 per lb. The cost is per unit specified in the Unit field.

We have built in conversions between units of the same type (i.e. feet to inches or mm), so you don't have to keep track of how the cost was entered. But we can't perform cross unit conversions.

We keep track of when each line is modified to help keep you organized. The enabled checkbox controls which items display in the drop down menus.





Fruit													
	Matl	Type	Size	Gauge	SPEC	Cost	Weight	Unit	Cons Op	Cons Rate	Comment	Date	Enabled
27	Fruit	Apple	Cup			0,830	0,3333	с		0	Price per Cup of Granny Apples	2013-06-11	(V)
1%	Fruit	Cherry	Cup	NA	Tari	0.970	0.3333	С .	-	0	Estimated	2013-06-06	2
2%	Fruit	Peach	Cup			1.651	0.3333	c (Roller	25	Estimated	2013-06-10	

We've added a Consumables Cost Operations entry to make it easier for you to develop cost proposals. This allows entering an operation for each raw material and to attach a variable cost factor to it.



In this example, we are specifying that when Fruit PEACH is processed through the Roller operation, we will apply a consumables cost of \$25 / hour. This can be used to estimate the costs of consumable items which should not be included in overhead costs.



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- The material cost tables are easy to edit. Click on the pencil next to the record, and the edit material box will appear.
- Select the item you wish to change, and enter the new value.
- The tool will keep track of the date of the latest change to help keep you organized.

Edit Material

Material:	Aluminum	-
Type:	Angle	-
Size:	1 X 1 X 1/8	-
Gauge:	.125*	-
Spec:	6061-T6	-
Cost:	0.035	
Weight:	0.0229	
Units:	inch	•
Cons Op:		•
Cons Rate:	0	
Comment:		



×



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Flour	S												
	Matl	Туре	Size	Gauge	SPEC	Cost	Weight	Unit	Cons Op	Cons Rate	Comment	Date	Enabled
2%	Flour	Self Rising	5 (b 8 ag			0,130	4.2500	с		0	Test on 02/08/2013	2013-07-25	191
2%	Flour	White	10 Pound Bag			0,195	1,0000	lb		0		2013-07-25	121
2%	Flour	White	Per Cup			0,052	4.2500	С		0		2013-07-25	1
Fruit	Mati	Туре	Size	Gauge	SPEC	Cost	Weight	Unit	Cons Op	Cons Rate	Comment	Date	Enabled
	Mati	Туре	Size	Gauge	SPEC	Cost	Weight	Unit	Cons Op	Cons Rate	Comment Price per Cup of	Date	Enabled
10	- Fruit	Арріе	Lup			0.850	0.3333	L.		U	Granny Apples	2013-00-11	
2%	Fruit	Cherry	Cup	NA	Tart	0.970	0.3333	с		0	Estimated	2013-06-06	
27	Fruit	Peach	Cup			1.651	0.3333	C	Roller	25	Estimated	2013-06-10	2

You can delete materials that aren't used in any cost estimates, but we won't allow you to delete entries that are used in cost estimates. If a material isn't enabled, you won't be able to pick it for a new estimate.

When the "X" is bold, you can delete the record, when it is shaded, you can't.

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When you need to add a material, just click on the add a new material button. A pop-up will appear for the entry of the new data.

You can pick a category from the drop down menus, or enter a new value in the box. When finished, click on OK. If you made a mistake, don't worry, just use the editing process to fix it.

board for E 1	iurbo Tools	Product Price Model
lew Material		
8		
Matl	Type	Size
Flour	Self Rising	5 lb Bag
Flour	White	10 Pound Bag
Flour	White	Per Cup
	Material. Mati Flour Flour Flour	Matl Type Flour Self Rising Flour White Flour White

Material	Flour	
Type:	White	
Size:	25 Pound Bag	-
Gauge:		-
Spec:		-
Cost:	1.20	
Weight:	.619	
Units:	lb	
Cons Op:		
Cons Rate:		
Comment:		



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		T I			QUO ent Tool	te		
Dashboard for E Turb	Tools Product	Price Model	Customen	5	Data Tables	Users	Reports	Logout
Quotes		Custor	ners		Labor Rate 1 Material Cos	Tables 1 Tables	Packages	
Quotes Not Started: Quotes In Progress:	20 19	Total Cu	stomers;	4	Purchased F Export To C	hart Tables SV	Tables Updated	2013-08-21 2013-08-21
Finished Quotes: Total Quotes: Oldest REO:	2 41 2012-12-08					Purch	nems Updated:	2013-07-30

Purchased parts tables contain the cost and specification details for purchased materials. Generally, purchased parts are used unmodified.

Examples are hardware, springs, complex assemblies, lights and other items you use. *The products you purchase are the finished items of another company.*

To enter the purchasing parts screen, go to Data Packages and click on Purchased Parts Tables.

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tem Card Management Tools

		Dashbo	ard for E Turbo T	oois Product	Price Model	Customers	Data Tabia	es Users	Reports	Logout		
Add	New Purchase	d Part										
Groa	wy											
κ.	Suppler	Category	Description	Supp Part Num	Part Number	Purch Order	Cost	Lead Time	FOB	Min Order	Date	Enabled
14	Grocery	Dry Good	Cup BSug	3	Sugar - 4		0.619	Week	Adrian	10 Ibs		2
1%	Grocery	Dry Good	cap soga	4	Sugar-2	0	0.278	Week	Adrian	10 lbs	2013-07-30	V
JX	Grocery	Dry Good	lb RSuga	6	Sugar - 3	0	1.39	1 Week	Adrian	10 Bas	2013-07-30	
XX	Grocery	Dry Good	Ib sugar	3	Sogar - 1		0.6	1 Week	Adrian	10 lbs	2013-07-30	V
1.7	Grocery	Dry Good	Salt -1	1	Salt - 1	0	0.295	Week	Adrine	10.058	2013-07-30	V
1×	Grocery	Dry Good	Salt - t	2	Salt - 2	0	0.004	Week	Adrian	10 Bs	2013-07-30	1
2%	Grocery	Juice	tsp Lemo	111	มแ	0	0.00943142	I Day	Adrian	1 Сахе	2013-07-30	V

The Purchased Parts Table is grouped by Supplier Name. Within each group, the data is sorted by Category, Description, Supplier Part Number and Part Number. We keep track of when each line is modified to help keep you organized. The enabled checkbox controls which items display in the drop down menus.

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The purchased items cost tables are easy to edit. Click on the pencil \checkmark next to the record, and the edit item box will appear.

Select the item you wish to change, and enter the new value.

The tool will keep track of the date of the latest change to help keep you organized.

Edit Purchased Part

Grocery	
Dry Good	•
Cup BSug	
5	
Sugar - 4	
0.619	
1 Week	
Adrian	
10 lbs	
	Grocery Dry Good Cup BSug 5 Sugar - 4 0.619 1 Week Adrian 10 lbs

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Ok

29

×

		Dashbo	ard for E Turbo T	ools
Add	New Purchase	d Part		
Groc	ery			
	Supplier	Category	Description	Supp Pa
2 ×	Grocery	Dry Good	Cup BSug	5
2×	Grocery	Dry Good	cup suga	4
2X	Grocery	Dry Good	lb BSuga	6
1×	Grocery	Dry Good	lb sugar	3
2×	Grocery	Dry Good	Salt - 1	1
2×	Grocery	Dry Good	Salt - t	2
2×	Grocery	Juice	tsp Lemo	LJ 1

You can delete items that aren't used in any cost estimates, but we won't allow you to delete entries that are used in cost estimates. If an item isn't enabled, you won't be able to pick it for a new estimate.

When the \times is bold, you can delete the record, when it is shaded, you can't.

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Pricing Development Tool

Dashboard for E Turbo	o Tools Prod	uct Price Model	Customer	s Data	Tables	Users	Reports	Logout
Quotes		Custor	ners		Access	Administrat Data	Packages	
Quotes Not Started: Quotes In Progress: Finished Quotes: Total Quotes: Oldest RFQ:	20 19 2 41 2012-12-08	Total Cu	stomers:	4		Labor 1 Mati Ta Purch I	Tables Updated: ables Updated: tems Updated:	2013-08-21 2013-08-21 2013-07-30

Access Administration is used to control access to each area of eTurboQuote. You may give several users complete access to the entire tool. Or you may decide to delegate responsibilities. It's up to you. You make the tool work the way you need it to. Go to the users tab and click on Access Administration.

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					Administrat	tion							
Dashboa	rd for E	Turbo Tools	Product	Price Model	Customers	Data Tables	Users	Reports	Logou	ł			
Privilege Modify	s Approve	Instance		Username	New Password	Repeat Password	E-mail Address	Instanc Admin	⁰ Quote	Sales	Labor	Mat	Pure
K MSave		E Turbo Tools		antsop			abe@alsophome	1	821		12		12
KHSave	1	E Turbo Tools		BrianKrichbaum			Brian Krichbaum			1	[2]	$[\underline{v}]$	V
K []]Save		E Turbo Tools		CUSTTEST				2	2				
K 🖽 Save		E Turbo Tools		Temp			[121		2	19	1
Add new		Demo		-user-					0	13	81	8	

The access control panel is used to grant access to users. The username in this screen is used to log on, and each user has their own, unique password.

Different functions within the tool have controlled access privileges, and they are all controlled through this screen.

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Privileges												
Modify /	Approve	Instance	Username	New Password	Repeat Password	E-mail Address	Instance Admin	Quote	Sales	Labor	Matl	Purch
× H Save	V	E Turbo Tools	BrianKrichbaum			Brian Krichbaum						
Add new	2	Demo	— user —][]			13	۵	13		E	E

Selecting the Quote Box will give the user access to the cost estimating functions of the tool. The RFQ screens populate the Estimator Drop Down boxes based upon the selection of this box.

Selecting the Sales Box will give the user access to the RFQ functions of the tool. The salesman drop down menu is populated based upon the selection of this box.

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Modify	s Approve	Instance		Username	New Password	Repeat Password	E-mail Address	Instance Admin	Quote	Sales	Labor	Matl	Purch
× HSave		E Turbo Tools	-	BrianKrichbaum][1	Brian.Krichbaum:				7	1	
Add new	1	Demo	-	- user	1	1		63					

Selecting the Labor, Material or Purchasing Boxes give the user access to the respective Data Packages. With this access, the user can add, edit, or delete entries from the data table.

In practice, it is common to limit to these data tables to accounting, purchasing and materials management personnel.

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Let's Do a Cost Estimate: Make a Request for Quote (RFQ)

Dashboard for E Turbo Tools		Product Price Model	Model Customers Data Tables		Users	Reports	Logout
Quotes		New RFQ Open Estimate	iers		Data	Packages	
Quotes Not Started: Quotes In Progress: Finished Quotes: Total Quotes:	20 19 2 41	New Level Template Edit Level Template Finished Estimates	tomers: 4		Labor Matl Ti Purch I	Tables Updated: ables Updated: tems Updated:	2013-08-21 2013-08-21 2013-07-30
Oldest RFQ:	2012-12	2-08					

So now we're ready. Let's build a cost estimate.

Cost estimates are accessed via the Product Price Model tab. Before you can enter any data, there needs to be a Request for Quote. You may choose to enter your own, or the sales organization within your business may enter the RFQ's as they arrive from customers.

Click on New RFQ to start.

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Make a Request for Quote (RFQ)



Choose the customer, salesman, and the estimator from the drop down menus. You also have the opportunity to enter a keyword.

This is to make it easier to find proposals in the future. You don't have to use it, but with large databases it can ease searching in the future. When finished, click next

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Choose the product line from the drop down menu. Enter the proposal number, it's just a text field so you can put in anything you wish. The margin defines how much profit you make. Here is how it affects the selling price.

Price = (Cost / (100% – Margin%)) x 100

You can enter Part Numbers and Product Names; we won't let you continue without entering a product name. They are text fields, so enter anything you like. But, make sure you get it right or they may be hard to find down the road.

New RFQ

	and the second se
Product Line:	Pies
Proposal Number:	FTC-134-A
Margin:	40 %
Lot Size:	50
Customer Part Number	FTC-134
Product Name:	Cherry Ple
Target Date:	2013-08-30
RFQ Template:	None 💌
Feasibility Comment:	
Assumptions Comment:	
General Comment:	
History/Customer letter:	Choose File. No file chosen
History/Customer letter description	
Quote letter	Choose File No file chosen
Quote letter description:	
Picture	Choose File No file chosen
Picture description:	



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We also ask for the estimate completion target date. This allows you to quickly find estimates, or to generate custom reports based on due dates.

Just pick the date from the pop-up calendar.

New RFQ							
New Quote for customer	First Cla	55 Ba	kery				
Product Line:	Pies						
Proposal Number:	FTC-	24-1	۸.				
Margin:	40			×			
Lot Size:	50			1			
Customer Part Number	FTC-	34		1			
Product Name:	Cherr	y Pie					
Target Date:			Aug	ust 2	013		0
RFQ Template:	Su	Мо	Tu	We	Th	Fr	Sa
Feasibility Comment:	-	11.1	6	1957			
Assumptions Comment:		12	-11	0	15		
General Comment:	25	26	27	28	29	30	31
History/Customer letter.	Choo	se Fi	le N	o file (chose	in i	
History/Customer letter description:							
Quote letter	Cihoo	se Fi	lo N	o filo e	hose	n	
Quote letter description:							
Picture:	Choor	le Fil	e Ne	file o	hose	7	
Noture description:							
	Subm	it RF	Q				



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For now we won't be discussing the RFQ template field, but we'll come back to it.

The Feasibility, Assumptions, and General Comment fields allow you to enter comments, so when you come back later you will know what you were thinking.

We also encourage you to attach associated documents to the cost estimate. Just navigate to the file you want to attach and select it. You can add a description to each to remind you what it is or why you attached it. We allow all file type except for EXE or DLL files.

When finished, click on Submit RFQ to continue.





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New RFQ	×
The RFQ has been created successfully with QIN a	0130825-6363
Continue working	

You can stop here if you'd like.

If you've decided to delegate responsibilities, this will typically be the end of the sales group's part of the process. From here, you will be entering the resources that actually generate the cost estimate.

By clicking on Continue Working, the tool will take you directly to the cost estimating screens.

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Work on a Proposal!



Pricing Development Tool

Dashboard for E Turbo	o Tools	Product Price Model	Customers	Data Tables	Users	Reports	Logout
Quotes	_	New RFQ Open Estimate	mers		Data	Packages	
Quotes Not Started: Quotes In Progress: Finished Quotes: Total Quotes:	20 19 2 41	New Level Template Edit Level Template Finished Estimates	ustomers: 4		Labor 1 Matl Ta Purch It	<u>lables</u> Updated <u>bles</u> Updated: tems Updated:	1: 2013-08-21 2013-08-21 2013-07-30
Oldest RFQ:	2012-	12-08					

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Proposals are accessed via the Product Price Model tab. If you want to work on any proposal that has been started (through the NEW RFQ screens) that is still unfinished, click on the Open RFQ button.

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Select a Proposal

Open RFQ

earch:			Results
earch: Customer: Show's Quotes After: Show Quotes Before: Farget Date: Salesman:	First Class Bakery 2013-08-24 2013-08-24 BrianKrichbaum	•	First Class Bakery-Creme Pies Pumpkin Pie-12345 - First Class Bakery-Bread-White Bread-123 - First Class Bakery-Pies-TEST PIE First Class Bakery-Pies-Peach Pie-A1234-121 First Class Bakery-Pies-Peach Pie-A234-121 First Class Bakery-Pies-Peach Pie-PP - 01001-Peach Pie First Class Bakery-Pies-Peach Pie-PP - 01001-Peach Pie First Class Bakery-Pies-Peach Pie-PP - 01001-Peach Pie First Class Bakery-Pies-Peach Pie-PP - 0001-Peach Pie First Class Bakery-Pies-Cherry Pie-A-234Pie First Class Bakery-Pies-TEST-123456-TEST1
iost Estimator: roposal ID: iustomer Quote ID:	Dearb Blas	•	First Class Bakery-Pies-Cherry Pie-a-234Pie First Class Bakery-Pies-Cherry Pie-AC-234Pie First Class Bakery-Pies-Cherry Pie-234Pie First Class Bakery-Pies-TEST 21-12546TEST32 First Class Bakery-Pies-Large Cherry Pie-hhij-123SAMPL First Class Bakery-Pies-Large Cherry Pie-hhij-123SAMPL First Class Bakery-Pies-Large Cherry Pie-hhij-123SAMPL Time Works-Casters-test234-123456-test New Bakery-Pies-Apple-3hi New Bakery-Pies-Apple-3hi
roduct Line: (eyword: itatus:		•	Load

The search tool helps you to quickly find the proposal you would like to work on. As you choose criteria to match through the drop down menus, matching records are displayed on the right.

There is no need to populate all of the drop down menus. You can use as many or as few as you like.

When you select MATCH ANY CRITERIA the display screen will show all records that match any of the criteria. As you select more criteria, the list will grow longer.

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Select a Proposal

Customer: First Class Bakery Show s Quotes After: 2013-08-24 Show Quotes Before: 2013-08-24 Target Date: Imax Salesman: BrianKrichbaum Cost Estimator: Imax Proposal ID: Imax Customer Quote ID: Imax Product Name: Peach Pie- Product Line: Imax Keyw ord: Imax Status: Imax	Search:			Results	
Show S Quotes After: 2013-08-24 Show Quotes Before: 2013-08-24 Target Date: Target Date: Salesman: BrianKrichbaum Cost Estimator: Proposal ID: Customer Quote ID: Product Name: Peach Pie- Product Line: Keyw ord: Status:	Customer:	First Class Bakery		First Class Bakery-Pies-Peach Pie-A1234-121 First Class Bakery-Pies-Peach Pie-A1234-121	^
Tanget Date: Salesman: BrianKrichbaum Cost Estimator: Proposal ID: Customer Quote ID: Product Name: Peach Pie Product Line: Keyw ord: Status:	Show's Quotes After: Show Quotes Before:	2013-08-24			
Salesman: BrianKrichbaum Cost Estimator: Proposal ID: Customer Quote ID: Product Name: Product Line: Keyword: Status:	Target Date:		•		
Cost Estimator: Proposal ID: Customer Quote ID: Product Name: Peach Ple- Product Line: Keyw ord: Status:	Salesman:	BrianKrichbaum			
Proposal ID: Customer Quote ID: Product Name: Peach Pie- Product Line: Keyw ord: Status:	Cost Estimator:		*		
Customer Quote ID: Product Name: Peach Pie- Product Line: Load Keyword: Status:	Proposal ID:				
Product Name: Peach Pie-	Customer Quote ID:				
Product Line: Load Keyword: Status:	Product Name:	Peach Pie-			-
Keyword:	Product Line:				Load
Status:	Keyword:				
	Status				

When you select MATCH ALL CRITERIA the display screen will show only records that match *all* criteria that you have chosen through the drop down menus. As you select more criteria, the list will grow shorter.

Turbo Quote

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Select a Proposal

Open RFQ

leanch:		Results
earch: Customer: Show's Quotes After; Show Quotes Before: Target Date: Salesman: Cost Estimator: Proposal ID: Customer Quote ID: Product Name: Product Line: Keyword:	First Class Bakery 2013-08-24 2013-08-24 BrianKrichbaum Peach Pie-	Results: First Class Bakery-Creme Pies Pumpkin Pie 12345 - First Class Bakery-Pies-TEST PIE First Class Bakery-Pies-Peach Pie-A1234-121 First Class Bakery-Pies-Peach Pie-PP - 01001-Peach Pie First Class Bakery-Pies-Peach Pie-PP - 01001-Peach Pie First Class Bakery-Pies-Peach Pie-PP - 0100-Peach Pie First Class Bakery-Pies-Peach Pie-PP - 0100-Peach Pie First Class Bakery-Pies-Cherry Pie-A-234-Pie First Class Bakery-Pies-Cherry Pie-A-234-Pie First Class Bakery-Pies-Cherry Pie-A-234-Pie First Class Bakery-Pies-Cherry Pie-A-234-Pie First Class Bakery-Pies-Cherry Pie-A234-Pie First Class Bakery-Pies-Apple-3-hi New Bakery-Pies-Apple-3-hi New "Bakery"-Pies-5-4-

Select the proposal you wish to work on.

×

Then click LOAD. That's it, you have the record and now we can get to work.

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Add Attachments

We've made it easy to keep track of all the files you access to build a cost proposal.

You can attach spreadsheets and letters, pictures and PDF files. You can attach copies of your design and of your CNC programs for your equipment.

Just click on the Update button next to the appropriate category and then point to the file you wish to attach.

Quote Info		Levels	
Customer:	First Class Bakery		
Quote Date:	2013-08-24		
Salesman:	BrianKrichbaum Edit		
Cost Estimator:	BrianKrichbaum Edit	3	
Proposal ID:	Peach • 0001	New Delete	Revise
Customer Quote ID:	PP - 01001		
Lot Size:	25	Total Costs	
Customer Product Name	Peach Pie-22 Edit	Labor Cost: Var Cost:	\$0,00 \$0,00
Product Line:	Pies Edit	Cons Cost:	\$0,00
Keyw ord :	Peaches Edit	Fixed Cost:	\$0,00
QIN:	20130824-0	Other Pace Costs	\$0,00
History / customer letter	View	Total Piece Cost:	\$0,00
Ounte letter	View	Tool Cost:	\$0,00
4	(Contraction of the second sec	Capital Investment:	\$0,00
Picture:	View Update	Setup Cost:	\$0.00
Status:	Not Started		
Save as template:	Save		C

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Edit Estimate Info:

You can revise the estimate header information from here too.

Just click on the edit button next to the area you wish to edit, then make the changes you want. When finished, click on the save button.

Quote Info		Levels	
Customer: Quote Date:	First Class Bakery 2013-08-24		
Cost Estimator:	BrianKrichbaum 💽 Save	2	
Proposal ID:	Peach • 0001	New Delete	Revise
Customer Quote ID:	PP - 01001		
Lot Size:	25	Total Costs	
Customer Product Name:	Peach Pie-22 Edit	Labor Cost. Var Cost:	\$0,00
Product Line:	Pies Edit	Cons Cost	\$0,00
Keyw ord:	Peaches Edit	Fixed Cost: Material Cost:	\$0.00 \$0.00
QIN:	20130824-0	Other Piece Costs:	\$0,00
History / customer letter:	View Update	Total Piece Cost:	\$0,00
Quote letter.	View	Tool Cost: Capital Investment:	\$0,00 \$0,00
Picture:	View Update	Setup Cost:	\$0,00
Status: Save as template:	Not Started Save		OF

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Quote Info		Levels	
Customer:	First Class Bakery		
Quote Date:	2013-08-24		
Salesman:	BrianKrichbaum Edit		
Cost Estimator.	BrianKrichbaum Edit		
Proposal ID:	Peach + 0001	New Delete	Revise
Customer Quote ID:	PP - 01001		
Lot Size:	25	Total Costs	
Customer Product Name	Peach Pie-22 Edit	Labor Cost:	\$0,00
customer novoer nume.	Tructine et [tun]	Var Cost	\$0,00
Product Line:	Pies Edit	Cons Cost:	\$0,00
Keyword:	Peaches Edit	Fixed Cost:	\$0,00
		Material Cost:	\$0,00
QIN:	20130824-0	Other Piece Costs:	\$0,00
History / customer letter:	View Update	Total Piece Cost:	\$9,00
Ouote letter	View lindate	Tool Cost:	\$0,00
Q	entralia contentia	Capital Investment:	\$0.00
Picture:	View Update	Setup Cost:	\$9,00
Status:	Not Started		0.22
Save as template:	Save		0
Add Revision	Delete this RFQ		

The first time you work on a new proposal the LEVELS box will be blank.

All proposals work with the same concept. Breaking a proposal into levels makes it easier to conceptualize and to focus as you enter the cost generating parameters.

There is no limit as to the number of levels you can have, but you must have at least one.

Turbo Ouote

To get started, click on the NEW button.

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a Q OTEITIET					
Quote Info			Levels		
Customer:	First Class	Bakery		0	
Quote Date:	2013-08-	24			
Salesman:	BrianKrich	baum Edit			
Cost Estimator.	Newlow		-		
Proposal ID:	New Leve		*	tlete Revise	J
Customer Quote II	Level Name	Crust			
Lot Size:	Load Template	None	-		
Customer Product	Piece		Qty Used:	\$0.00	
	Tool	0	1	\$0.00	
Product Line:	Invest	0		\$0.00	
Keyword:	Development	0		\$0.00	
QIN:	Comment:			\$0.00	
History / custome			~~~	st: \$0.00	
			Save Level	\$0.00	
Quote letter:			Capital Inves	tment: \$0.00	
Picture:	View	Update	Setup Cost:	\$0.00	
Status:	Not Start	ed			
Save as template:		Save		OK	
Add Revision		Delete this RFQ	1		

Now it is time to name the level.

There are no limitations, but you should use descriptive terms or naming conventions to make it easier to navigate in the future.

Enter any descriptive comments you'd like and click the SAVE LEVEL button to continue.

We will address the templates options later.



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Quote Info			Levels		
Customer: Quote Date: Salesman:	First Class 2013-08- BrianKrich	: Bakery 24 baum <u>Edit</u>			
Cost Estimator: Proposal ID:	New Leve	1	×	slete	- Revise
Customer Quote II Lot Size:	Level Name Load Template	Grust None			10.00
Customer Product	Piece Tool	0	Qty Used:		\$0.00 \$0.00 \$0.00
Keyw ord :	Invest Development	0	-		\$0.00 \$0.00
QIN: History / custome	Comment:			n: st:	50.00 50.00
Quote letter:	View	Update	Capital Inves	tm ent:	\$0.00 \$0.00
Status: Save as template:	Not Starte	ed Save	Setup Cost		OK
Add Revision		Delete this RFQ			

In addition to naming the level, you need to identify what type (Piece, Tool, Capital, Development).

When a level is designated as Piece, the cost is included in the per piece cost calculations. The detail quote reports will show how these Piece levels roll up to the total cost.

Tooling, Invest and Development selections will rollup in separate categories, also summarized in the quote detail reports.



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juote Info			Levels	
Customer: Quote Date: Salesman:	First Class 2013-08- BrianKrich	i Bakery 24 baum <u>Edit</u>		
Cost Estimator: Proposal ID:	New Leve	1	×	- rlete Revise
Customer Quote II Lot Size:	Level Name Load Template	Grust]	
Customer Product	Piece Tool		Qty Used:	\$0.00 \$0.00
Product Line:	Invest Development	0		\$0.00 \$0.00
keyword: QIN:	Comment:			\$0.00 ta: \$0.00
History / custome			Save (evel)	st: \$0.00
Quote letter:			Capital Invest	\$0.00 (m.e.nt: \$0.00
ncture: Status:	Not Start	ed	Setup Cost:	\$0.00
Save as template:		Save		OK
Add Revision		Delete this RFQ		

You can also load a level from an existing template, but we'll get more into that later.



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For each level, you have four cost categories to choose from. This allows the tool to keep the costs in the proper buckets and to allow more detailed analysis down the road.

Level Name	Crust	
Load Template	None	
Piece	۲	Qty Used:
Tool	0	1
Invest	0	
Development	0	
Comment:		

The first, and most often used category is Piece. This category contains all of the costs associated with producing the product or service. Purchased parts used on the product, labor costs, and material costs are generally contained here. An accountant would call these costs COGS (cost of goods sold).



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The other three categories are Tooling, Capital and Development.

Tooling is the cost of necessary, purpose driven tools needed to make the product.

Investment is capital equipment and generalized tools (items that are used on multiple product lines) needed to make the product.

Development is the cost of engineering services or other similar costs.



If this is a multi-leveled proposal, you must enter the number of this level that is in the final end item. For example, if this represents a part used 3 times, you would enter 3 in the Qty Used box.



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Assembly Crust Filling	*
New Delete	Revise
evels 1. Crust 2. Filling 3. Assembly	*

We've setup the levels to be displayed in alphanumeric order to make it easy for you to find what you're looking for.

But if you want to force the levels into your own preferred order, you can easily do this by adding a number in front of the level name.



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Enter the Level Details

RFQ Overview

Quote Info						
Customer:	First Class Bakery					
Quote Date:	2013-08-24					
Salesman:	BrianKrichbaum					
Cost Estimator:	BrianKrichbaum					
Proposal ID:	Peach - 0001					
Customer Quote ID:	PP - 01001					
Lot Size:	25					
Customer Product Name:	Peach Pie-22 Edit					
Product Line:	Pies Edit					
Keyw ord:	Peaches Edit.					
QIN:	20130824-0					
History / customer letter.	View Update					
Quote letter:	View Update					
Picture:	View Update					
Status:	In Progress Update					
Save as template:	Save					
Add Revision	Delete this RFQ					

1. Crust 2. Filling 3. Assembly					
New Delete	Revise				
Total Costs					
Labor Cost:	\$0,00				
Var Cost:	\$0,00				
Cons Cest	\$0,00				
Fixed Cost	\$0,00				
Material Cost:	90,02				
Other Piece Costs:	\$0,00				
Total Piece Cost:	\$0,00				
Tool Cost:	\$0,00				
Capital Investment:	\$0,00				
Setun Cost	\$0.00				

Once you have created a level, you can begin to enter its details.

Highlight the level, then click the REVISE button. You will be taken to the edit screen for that level.

New levels can still be created, and you can also delete levels.



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Enter the Level Details

All the details of the level are editable. The level type (Piece, Tool, Capital and Invest) can be changed, as can the parts quantity. Remember that this is the quantity of this level used in the final item.

The Level Cost summary shows cost roll-up as you proceed through entering the details of the level.

To start, pick one of the Cost Details categories, and select using the corresponding EDIT button.

We will start with materials, but you can proceed however you prefer.

Edit User Level Name

×

Piece 🙂 Too	Capital O						
arts Quantity: 1							
omment:							
Save Updates							
Total Costs for Leve	el						
Labor Cost	\$0,00						
Var Cost	\$0.00						
Fixed Cost	\$0.00						
Consumables Cost	\$0,00						
Material Cost	\$0.42						
Purchased Parts	\$1,12						
Shipping Costs	\$2,23						
Total Ad Hoc Cost	\$15.25						
Total Piece Cost	\$19.01						
Setup Cost	\$0.00						
Cost Details							
Materials	Edit						
Operational	Edit						
Purchasing	Edit						
Ad hoc	Edit						



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Enter the Level Details:Material Costs

To add a new material to your cost estimate, click on the NEW MATERIAL button.

Materials C	osts								*
Materials Cost: Material	Туре	Size	Spec	Gauge	Units	Dimensions	Units Yield	Scrap Loss	New Material Save

Иa	terials C	ost	s										
Mat	erials Gost: Material		Туре	Size	Spec	Gauge	Units	Dimen	isions		Units Yield	Scrap L	.053
×	Flour		White	Per Cup	NA		C	3	NA	NA	1	0	15

You select the material used from the drop down menus. You have to work through all the drop downs, don't skip any.

Conversions are automatic, so use whatever units you like. You don't even need to be consistent through a proposal.



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Enter the Level Details: Material Costs

Units

C

* D *

Dimensions

Select the units from the menu.

Size

· Per Cup

· Buk

Materials Costs

Type

White

· Crisco

Materials Cost: Material

Shortening

X Flour

We indicate where you need to enter data.

Scec

---- NA----

▼ Commerci ▼ 0

Gauge

----NA---

The Units Yield field allows you to specify how many pieces will come from the material you have specified. In this example I am saying that 10 pie crusts will be made from 1 lb of shortening.

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Units Vield

NA

NA

Scrap Loss

New Material Save

Enter the Level Details: Material Costs

Flair		014.0	Spec	\$	Gauge	Units	Dimen	sions		Units Yield	Scrap Lo	4.5
T KAUS	White	Per Cup	 NA	•	NA	C	3	NA	NA	1	0	3.
Shortening	Crisco	Buk	Germerci		0	b 💌	1	NA	NA	10	05	1
									/			

The Scrap Loss box tells what scrap factor is use in calculating material costs. In this example, I have specified a 5% scrap factor.

After calculating the cost of material, the tool will add 5% for scrap loss. Note that this is not the same as material offal.

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0

05

59

1

10

Enter the Level Details: Material Costs

Mat	erials Cost															
	Material	Туре		Size		Spec		Gauge		Units	Dimen	sions		Units Yield	Scrap	Loss
X	Flour	White	-	Per Cup	-	NA	•	NA		C	3	NA	NA	1	0	24
×	Shortening	Crisco	-	Buk	-	Cermerci		0	-	b .	1	NA	NA	10	05	N.

When finished entering material, click on the Save button.

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Enter the Level Details: Material Costs

evel Name: 1. Cr.	ast
Piece O Too	I O Capital O De
hete Ouretitue	1
ares Quantity. 1	
comment:	<i>.</i>
Save Updates	
Total Costs for Leve	al
Labor Cost	\$0,00
Var Cost	\$0.00
Fixed Cost	\$0,00
Consumables Cost	\$0,00
Noterial Cost	\$0.42
Purchased Parts	\$1.12
Shipping Costs	\$2.23
Total Ad Hoc Cost	\$15.25
Total Piece Cost	\$19,01
Setup Cost	\$0,00
Cost Details	
Materials	Editur
Operational	Edit
Purchasing	Edit
Ad box	Edit

When you return to the level summary screen, you will see that the material costs are now displayed along with the new Total Piece Cost.

Note that this is the total piece cost for the level, not the assembly. If you have entered the Parts Quantity as 2, then the cost displayed here would not change. But in the overall cost rollup, the value used will be 2 times what is being shown.



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Enter the Level Details: Operational Costs

evel Name: 1, Cr	ast
Bere Too	Capital Dev
S nece S los	i o capital o per
Parts Quantity: 1	
Comment:	þ
Save Updates	
Total Costs for Leve	pl
Labor Cost	\$0,00
Var Cost	\$0,00
Fixed Cost	\$0,00
Consumables Cost	\$0,00
Moterial Cost	\$0.42
Purchased Parts	\$1.12
Shipping Costs	\$2,23
Total Ad Hoc Cost	\$15.25
Total Piece Cost	\$19,01
Setup Cost	\$0.00
Cost Details	
Materials	Editur
Operational	Edit
Purchasing	Edit
Ad hoc	Edit

Move to the next category by clicking on the appropriate EDIT button. I'll choose to work on Operational Costs next.



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perati	onal Cos	ts for Curren	t Lovel:									
Oper	ation	Crew	Hourly Rate	Cycle Minutes	Scrap Loss %	Setup Minutes	Opt	aration Cost	Se	tup Cost	Comment	1
Roller	-		1				\$	0.00	\$	0.00		
Roller	-		1				5	0.00	\$	0.00		
Roiler	F						5	0.00	\$	0.00		
Roller	-						8	0,00	\$	0.00		
Roller	-						s	0.00	\$	0.00		
Roller	-						s	0.00	\$	0.00		1
Roller	-						5	0.00	\$	0.00		14
Roller			1				5	0,00	\$	0.00		1
Roller							5	0.00	\$	0.00		
Roller							s	0,00	\$	0.00		
Roller	-		1	1	[]		s	0.00	\$	0.00		1
Roller	-		1	1	(s	0.00	\$	0.00		7.

Enter Level Details: Operational Costs

This is a list of the various "operations" found in our plant. They are the cost centers entered in the Labor Cost Tables.

Select the operation you wish to enter, then move on to the next box.



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Enter Level Details: Operational Costs

erational Co	ests for Curre	nt Level:						
Operation	Crew	Hourly Rate	Cycle Minutes	Scrap Loss %	Setup Minutes	Operation Cost	Setup Cost	Comment
leor 💽	1.	120	0.50	05	3	\$ 0.73	\$ 4.20	Mx ingredients
olier 💌	t	20	3.00	1	3	\$ \$47.	\$ 5.01	Roll out pie dough
oler 💌][]			\$ 0.00	\$ 0.00	[
oler 💌		1				\$ 0.00	\$ 0.00	
oler 💌		1	1			\$ 0.00	\$ 0.00	
oler 💌			1			\$ 0.00	5 0.00	-
oler 🔫		1	1			5 0.00	\$ 0.00	
oller 💌		30)(5 0.00	\$ 0.00	
oller 💌)()			\$ 0.00	\$ 0.00	
olier 💌		3)[]			\$ 0.00	\$ 0.00	
oler 💌			1			5 0.00	\$ 0.00	
olier [w]		11	17	1	- T	1 0.00	1 0.00	1

Enter the crew size, Production Rate, and setup minutes.

Crew size is the number of persons working on the particular operation. If it is an assembly line, you may have 10 or 20 or even more people.

You can enter the production rate in either the Hourly Rate or the Cycle Minutes fields. eTurboQuote knows the relationship between the two, so it will calculate and automatically populate the one you don't fill. Hourly Rate is the speed at which parts are produced through the operation, in parts / hour. Cycle Minutes is the time, in minutes, it takes to complete the operation.

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Enter Level Details: Operational Costs

Operational Costs

Operation	Crew	Hourly Rate	Cycle Minutes	Scrap Loss %	Setup Minutes	Ор	eration Cost	- 54	Hup Cost	Comment
Asor 💽	1.	120	0.50	05	3	\$	0.73	1	4.20	Mx ingredients
olier 💌	t :	20	3.00	1	3	\$	5.67	\$	5,61	Roll out pie dough
oler 💌][][]			\$	0.00	\$	0.00	[
der 🙀						\$	0.00	\$	0.00	[
der 💌		1	1			5	0.00	\$	0.00	[
der 💌						8	0.00	\$	0.00	-
sker 🐙		1	10			5	0.00	\$	0.00	ſ
slar 💌		1)(8	0.00	\$	0.00	
sler 💌)()			5	0.08	\$	0.00	
der 💌)(1			8	0.00	\$	0.00	(
sler 💌		1)()			5	0.00	\$	0.00	1
olier [w]		1	11	1	- I	1	0.00	1	0.00	1

Setup time represents the effort needed to prepare the operation for production. The number entered represents the total setup minutes required. (The CREW size does not impact setup cost calculations).

The comment field is there to leave yourself a note, so you can know what you were thinking when you come back to this estimate next year. We display the current Operation Cost and Setup Cost calculations for each line as you enter the data. This way, if you make an entry error, you will be able to see it immediately.

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Enter the Level Details: Purchasing Costs

evel Name: 1. Cn	ust	
🖲 Piece 🔘 Too	l 🔘 Capital 🗧	्र
Parts Quantity: 1		
Comment:		4
Save Updates		
Total Costs for Lev	ol	_
Labor Cost	\$0,00	
Var Cost	\$0,00	
Fixed Cost	\$0,00	
Consumables Cost	\$0.00	
Material Cost	\$0.42	
Purchased Parts	\$1.12	
Shipping Costs	\$2,23	
Total Ad Hoc Cost	\$15.25	
Total Piece Cost	\$19.01	
Setup Cost	\$0.00	
Cost Details		
Materials	Edit	
Operational	Edit.,.	
Purchasing	Edit	
Ad hoc	Edit	

Move on the next category by clicking on the appropriate EDIT button. I'll choose to work on Purchasing Costs next.



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Enter the Level Details: Purchasing Costs

hiri	chasing Cost									
	Description	Part Number		Price	Quantity	Units Yield	Scrap Loss %	Total Line Shipping Cost	Extended Cost	Shipping Cost
ĸ	Cup BSug	Sugar - 4		0,619	1	1	0	[]	5 0,62	s 0,00
<	Pallet	P-001	-	10,00	1	50	0	1	\$ 0,20	\$ 1.00
<	Gaylord Box	GB-001		14.95	1	50	0	1	\$ 0.30	s 1.00
K)	Divider - Small	D-001-SM		275	16	60	0	1	\$ 0,09	\$ 1,00
ĸ	Lid	L-001	-	1,95	1	50	0	1	\$ 0,04	\$ 1,00

To add a new Purchased Item to your cost estimate, click on the NEW PURCHASING COST button.

You select the Purchased Items from the drop down menus. If you know the part number, skip the Description field and key the part number directly into the Part Number field.

The price is retrieved from the purchased parts database, you don't enter it

The quantity is the number of this component used in this level, not the total used in the entire product.

The shipping cost is the cost applied to this level. Depending on your proposal, it is likely that you will need to extrapolate the cost.



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Enter the Level Details: Purchasing Costs

ur)	chasing Cost										
	Description		Part Number		Price	Quantity	Units Yield	Scrap Loss %	Total Line Shipping Cost	Extended Cost	Shipping Cost
¢	Cup BSug		Sugar - 4		0,619	1	1	0		5 0,62	5 0,00
5	Pallet	-	P-001	-	10,00	1	50	0	1	\$ 0.20	\$ 1.00
<	Gaylord Box		GB-001		14.95	1	50	0	1	\$ 0.30	s[1.00
¢	Divider - Small		D-001-SM		275	16	60	0	•	\$ 0,09	\$ 1.00
ć	Lid		L-001	-	1,95	1	50	0	1	\$ 0,04	\$ 1,00

The Units Yield Field is available when entering purchasing costs as well.

In this example, we have a shipping container that will hold 50 pieces of our finished product. The purchased items consist of 1 pallet, 1 gaylord sized box, 16 dividers, and 1 lid. eTurboQuote is calculating the costs of these items for a single unit.

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Enter the Level Details: Purchasing Costs

Pur	chasing Cost										
	Description		Part Number		Price	Quantity	Units Yield	Scrap Loss %	Total Line Shipping Cost	Extended Cost	Shipping Cos
×	Oup BSug		Sugar - 4		0,619	1	1	0		10,62	s <mark>0,00</mark>
×	Palet		P-001	+	10,00	1	50	0	1	\$ 0,20	\$ 1.00
K	Gaylord Box		GB-001		14.95	1	50	0	1	\$ 0.30	\$ 1.00
ĸ	Divider - Small		D-001-SM		.276	16	60	0	1	\$ 0,09	\$ 1,00
×	Lid	-	L-001	-	1,95	1 i	50	0	1	\$ 0,04	\$ 1,00

New Purchasing Cost Save

When finished, click on the SAVE button to return to the Edit Level screen.

Level Name: 1, Cr	ast
🖲 Piece 🔘 Too	I O Capital O Dev
Parts Quantities	1
Comment:	h
Save Updates	
Total Costs for Leve	bl
Labor Cost	\$0,00
Var Cost	\$0,00
Fixed Cost	\$0,00
Consumables Cost	\$0,00
Material Cost	\$0.42
Purchased Parts	\$1.12
Shipping Costs	\$2,23
Total Ad Hoc Cost	\$15.25
Total Piece Cost	\$19.01
Setup Cost	\$0.00
Cost Details	
Materials	Editur
Operational	Edit
Purchasing	Edit.,
Adhes	Edit



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Enter Level Details: Ad Hoc Costs

Description	Part Number	Price	Quantity	Total Line Shipping Cost	Extended Cost	Shipping Cost
Anoodizing	NA	15.25	1	.225	\$	\$

Ad Hoc costs are similar to purchased parts costs. Here's the difference: Ad Hoc parts are purchased parts that are not included in the purchased parts database. Because of this, all of the fields are populated manually, there is no database that holds this information.

A word of warning; since there is no database of these items, the tool cannot automatically update when costs change. If you are awarded the work, you should add the Ad Hoc parts to the purchase parts database and revise the proposal to use the new purchased part.



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Enter Level Details: Ad Hoc Costs

41	loc Cost:						
	Description	Part Number	Price	Quantity	Total Line Shipping Cost	Extended Cost	Shipping Cost
5	Anoodizing	NA	15.25	1	.225	15.25	0.23

When finished, click on the SAVE button to return to the Edit Level screen.

Level Name: 1, Cr	ust
🦲 Piece 🔘 Too	🛛 🔘 Capital 🔘 Dev
Parts Quantity: 1	
Comment:	Æ
Save Updates	
Total Costs for Lev	le
Labor Cost	\$0,00
Var Cost	\$0.00
Fixed Cost	\$0,00
Consumables Cost	\$0,00
Material Cost	\$0.42
Purchased Parts	\$1.12
Shipping Costs	\$2,23
Total Ad Hoc Cost	\$15.25
Total Piece Cost	\$19.01
Setup Cost	\$0.00
Cost Details	
Materials	Editar
Operational	Edit
Purchasing	Edit
Ad hoc	Edit



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Continuing to Next Level

apte info		Levels	
Customer:	First Class Bakery	1. Crust	(e)
Quote Date:	2013-08-24	3, Assembly	
Salesman:	BrianKrichbaum Edit		
Cost Estimator:	BrianKrichbaum Edit.		-
Proposal ID:	Peach - 0001	New Delete	Revise
Customer Quote ID	PP+01001		
Lot Size	25	Total Costs	
Customer Product Name:	Peach Pie-22 Edit	Labor Cost Var Cost	\$0,00 \$0,00
Product Line:	Pies Edit	Cone Gest:	50,00
Course or eff	Poge her Frit	Fixed Cost:	\$0,00
Ney Hold.	FOR DES (1996)	Material Cest	\$0,00
OIN:	20130824-0	Other Place Costs:	\$0,00
listory / customer letter	View Update	Total Piece Cost:	\$0,00
Quote latter	[Vinu] [Indata]	Tool Cost:	\$0,00
guore server.	view j upuare	Capital Investment:	\$0.00
Picture:	View Update	Setup Cost	\$0.90
Status	In Progress Updates		(1)
Save as template	[Save		UK
Add Revision.	Delete this REQ		

That's it, you're done. If you need to work on another level, select it from the list and repeat the procedure that we just described.

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RFQ Overview: Update Status

Quote Info		tevels	
Customer Quore Date: Salesman Cost Estimator	First Class Bakery 2013-08-24 BrianKrichbaum BdB BrianKrichbaum BdB	1. Crist 2. Filling 3. Assembly	Update Status QIN: 20130824-0 Status: In Progress Accepted Rejected Awarded
Peoposal IO: Customer Quote ID: Lat Sizo. Customer Product Name: Product Line: Keyword. Offi: History / customer letter: Quote letter: Victure:	Peach - 0001 PP - 01001 25 Peach Re -22 Edit Pres Edit Pres Edit 20130824-0 View Update View Update	Teral Costs Labor Cost \$0.00 Var Dost \$0.00 Over Cost \$0.00 Fixed Cost \$0.00 Cove Cost \$0.00 Cove Fixed Cost \$0.00 Cove Fixed Cost \$0.00 Teel Fixes Cost \$0.00 Copical Fixes Cost \$0.00 Copical Fixes Cost \$0.00 Setup Cost \$0.00	
Status: Save as template Add Revisioner	In Progress Update	OK	

You can change the status of the RFQ (request for quote). Just click on the UPDATE button, then select the status you wish to save as. RFQ's when initially entered have a status of "Not Started". Once any work is performed, the status is revised to "In Progress" automatically. Future status changes are manual, not automatic.

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RFQ Overview: Delete RFQ

RFQ Overview

Quote Info	
Customer:	First Class Bakery
Quote Date:	2013-08-24
Salesman:	BrianKrichbaum Edit
Cost Estimator.	BrianKrichbaum
Proposal ID:	Peach - 0001
Customer Quote ID:	PP • 01001
Lot Size:	25
Customer Product Name:	Peach Pie-22 Edit
Product Line:	Pies Edit
Keyword:	Peaches Edit
QIN:	20130824-0
History / customer letter.	View Update
Quote letter:	View Update
Picture:	View Update
Status:	In Progress Update
Save as template:	Sav
Add Revision	Delete this RF

2, Filling 3, Assembly	
New Delete	Revise
fotal Costs	
Labor Cost:	\$0,00
Var Cost	\$0,00
Cons Cost:	\$0,00
Fixed Cost:	\$0,00
Material Cost:	\$0,00
Other Piece Costs:	\$0,00
Total Piece Cost:	50,00
Tool Cost:	\$0,00
Capital Investment:	\$0.00
Setup Cost:	\$0.00

It is possible to delete cost estimates. You will see a warning / confirmation dialog box before anything is deleted, but after you confirm it is really gone!

Turbo Quote

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RFQ Overview: Add Revision

RFQ Overview

Quote Info	
Customer:	First Class Bakery
Quote Date:	2013-08-24
Salesman:	BrianKrichbaum Edit
Cost Estimator.	BrianKrichbaum Edit
Proposal ID:	Peach - 0001
Customer Quote ID:	PP • 01001
Lot Size:	25
Customer Product Name:	Peach Pie-22 Edit
Product Line:	Pies Edit
Keyword:	Peaches Edit
QIN:	20130824-0
History / customer letter.	View Update
Quote letter:	View Update
Picture:	View. Update
Status:	In Progress Update
Save as template:	Save
Add Revision	Delete this RFQ

Levels	
1, Crust 2, Filling 3, Assembly	
New Delete	Revise
Total Costs	
Labor Cost	\$0,00
Var Cost	\$0,00
Cons Cost:	\$0,00
Fixed Cost:	\$0,00
Material Cost:	\$0,00
Other Piece Costs:	\$0,00
Cardina and a second second	\$0,00
Total Piece Cost:	
Total Piece Cost: Tool Cost:	\$0,00
Total Piece Cost: Tool Cost: Capital Investment:	\$0,00 \$0.00

You can create a revision copy of an estimate by clicking on the add revision button. This makes it easy to do what-if studies on various production scenerios, or to create a new estimate if an engineering change is made.

When you ADD REVISON, the original estimate is not affected, and once the revision estimate is created it will be loaded for edit.



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RFQ Overview: Add Revision

levision Product Name:	Peach Pie-22-	
Customer:	First Class Bakery	•
alesman:	BrianKrichbaum	•
Quoted by:	BrianKrichbaum	•
Product Line:	Pies	•
(eyw ord:	Peaches	
ot Size:	25	

When you add a revision, you have an opportunity to change the estimate header information. You can change the Product Name, or any of the other parameters shown here.

Once you are satisfied, just click the OK button and we will take you to the newly created revision to continue your work.



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Using Templates

In order to make the tool easier to use and "smarter", we have included a "Template" or "Standard Part" feature. Templates are used to enter standard proposal parameters that contain all the basic resource requirements for a particular product line or process family.

For example, if you are in the pie baking business, you might create a fruit pie template. This way, when you want to prepare a new proposal for Apple Pie, you just need to retrieve the fruit pie template, and then change the particular resources to customize the levels to making an apple pie.

There are two types of templates available – level templates and complete templates. There are multiple ways to access the template to allow you flexibility as you work.

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Pricing Development Tool

Assiduard for E Turo	TOOLS	FIGURE FICE MOR	Tes Cusioners Data rab	Nes Osers Reports Logour
Quotes		New RFQ Open Estimate	ners	Data Packages
Quotes Not Started: Quotes In Progress: Finished Quotes: Total Quotes:	18 21 2 41	New Level Templa Edit Level Templa Finished Estimate	ite ite s	Labor Tables Updated: 2013-08-21 Matl Tables Updated: 2013-08-21 Purch Items Updated: 2013-08-26
Oldest RFQ:	2012-1	2-08		

To create a new level template from scratch, move to the Product Price Model menu. Just click on the New Level Template selection, and you will be able to get started.

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Level Name	Crust	
Piece	0	Qty Used:
Tool	0	1
Invest	0	
Development	0	
Comment:		1.

The first step is to provide basic information about a template. The "Level Name" is the most important item. It is just a text field, so you name it anything you'd like, but be wise... You'll definitely want to find it later, so developing a naming strategy is a very good idea.

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Level Name	Crust	
Piece	۲	Qty Used:
ТооІ	0	1
Invest	0	
Development	0	
Comment:	Single baked crust	

In addition, you need to define what the template is used for. Is this item most likely to be part of piece cost, tooling, or capital equipment.

Don't get too hung up on this, you can easily come back and change it later. And, when a template is pulled up to be used in a proposal, you can customize all the settings however you'd like (and the template won't change).

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Level Name	Crust	
Piece	۲	Qty Used:
ТооІ	0	1
Invest	0	
Development	0	
Comment:	Single baked crust	

Finally, you can define standard quantities. Like with the other elements, you can always come back and edit this later, and you can customize it when it is used in an actual cost proposal.

The best practice is to set up templates as a single unit (Qty Used: = 1), then customize it when it is used in a cost proposal. But it's your choice.

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Edit Templat	te ×
Level Name: Crust	
B Dece 0 Tee	Cantal @ Day
Mece 0 100	i O Capital O Dev
Parts Quantity: 1	
Comment:	Baked Crust
Save Updates	
Total Costs for Leve	01
Labor Cost	\$0,00
Var Cost	\$0.00
Fixed Cost	\$0.00
Consumables Cost	\$0,00
Material Cost	\$0.00
Purchased Parts	\$0.00
Shipping Costs	\$0,00
Total Ad Hoc Cost	\$0.00
Total Piece Cost	\$0.00
Setup Cost	\$0,00
Cost Details	
Matorials	Edit
Operational	Edit
Purchasing	Editas
Adhoc	Edit

Do you think this looks familiar? Well it should. From here, creating a template is just like preparing a cost proposal. You can refer back to the detailed instructions to see how to do it if you'd like.



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Editing Level Templates



Pricing Development Tool

		New RFQ		
Quotes		Open Estimate		Data Packages
Quotes Not Started: Quotes In Progress: Einished Quotes:	18 21 2	New Level Template Edit Level Template	4	Labor Tables Updated: 2013-08-21 Matl Tables Updated: 2013-08-21 Purch Items Lindated: 2013-08-26
Total Quotes: Oldest RFQ:	41 2012-12-08	Finished Estimates		Turning opticity 2015-00-20

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Editing a level template is easy as well. In the Product Price Model drop down menu, select Open Level Template. This will take you back to the screens which define the details of the template.



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Using Templates

uate info			Levels		
Tustomer	First Clas	s Bakery			-
Quote Date:	2013-08	24			
Salesman	HitanKric)	baum (Edit			
lost Estimator				1	
Proposal ID:	New Leve			ziete.	Revise
Sustamer Quote II	Level Name	Grust			
ot Size:	Load Template	None	-		
Sustamer Produce	Piece	2	Qty Used:		\$0.00
malaet Line-	Tool	0	1		50.00
TODUCT LINE.	Invest	0			50.00
eyword:	Development	-0			50.00
5N:	Comment:		6		\$0.00
listory / custome				82	\$0.09
ante letter			Save Level		50.80
	Provening	particular and	Capital love	itment:	\$0.00
Scture	View	Update	Setup Cost:		\$0.00
Hatun:	Not Start	ed			OW
ave as template:		Save			OK
Add Revision		Delete this RFO			

Whenever you are working on a proposal, you have the option to use a Level Template to define a new level.

When you create a new level, just select the Level Template you'd like to use from the drop down menu. Change the quantity if you'd like, and then click on SAVE LEVEL.

The details of a level created using a template are still editable, and changing the level will not change the template. Likewise, changes to the template will not change the level.

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Creating Full Model Templates

_	-	-	-				-		
	-			10		-	11		rra.
1.1		•			-	1	# E	-	W
-	100	-	-	-	-			-	

Quote Info	
Customer:	First Class Bakery
Quote Date:	2013-08-24
Salesman:	BrianKrichbaum Edit
Cost Estimator.	BrianKrichbaum Edit
Proposal ID:	Peach - 0001
Customer Quote ID:	PP • 01001
Lot Size:	25
Customer Product Name:	Peach Pie-22 Edit
Product Line:	Pies Edit
Keyword:	Peaches Edit
QIN:	20130824-0
History / customer letter.	View Update
Quote letter:	View Update
Picture:	View Update
Status:	In Progress Update
Save as template:	Save
Add Revision	Delete this RFQ

E. Filling	
, Assenioy	
	-
New Delete	Revise
otal Costs	
Labor Cost:	\$0,00
Var Cost:	\$0,00
Cons Cost:	\$0,00
Fixed Cost:	\$0,00
Material Cost:	\$0,08
Other Place Costs:	\$0,00
l'otal Piece Cost:	\$0,00
Tool Cost:	\$0,00
Capital Investment:	\$0.00
	and the second

The process for creating full model templates is slightly different.

Any existing model can be used to create a Full Model Template.

On the RFQ screen, simply enter the name of the new template and press the SAVE button. The estimate is now available as a Full Model Template.



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Creating Full Model Templates

New Quote for customer	First Class Ba	kery	
Product Line:	Pies		
Proposal Number:	FTC-134-/		
Margin:	40	8	
Lot Silze:	50		
Customer Part Number:	FTC-134		
Product Name:	Cherry Ple		
Target Date:	2013-08-	10	
RFQ Template:	Fruit Pie		
Feasibility Comment:			
Assumptions Comment:			
General Comment:			
fistory/Customer letter.	Choose Fi	le. No	file cit
listory/Customer letter lescription			
Quote letter:	Choose Fil	a No	file ch
Quote letter fescription	1		
Scture:	Choose Fil	e No f	lle ch
lcture description:	[
	Submit RF	Q]	

The only opportunity you have to choose a Full Model Template is at the initial creation of a RFQ.

Select the RFQ Template from the drop down menu, then click the SUBMIT RFQ button.

When you choose to start working on this RFQ, the model will be populated with the Full Model Template Data.

This data is fully editable, and changes to the model won't affect the template, and changes to the template won't affect the model.



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Making a Report: Summary Reports



Pricing Development Tool

Dashboard for E Turbo	o Tools F	Product Price Model	Customers	Data Tables	Users	Reports	Logout
Quotes		Custor	ners		Da	Quote Summ	ary by Customer ary by Custom Search
Quotes Not Started: Quotes In Progress: Finished Quotes: Total Quotes: Oldest RFQ:	18 23 2 43 2012-12-08	Total Cu	stomers; 4		Lab- Mail Purch	Tables Updated	2013-08-21 2013-08-26

To generate a report, go to the reports menu. Choose the type of report you would like. Basically there are two types of reports, summary reports and detailed repots. We'll start by explaining the summary reports. For this example, I will use the Summary by Customer.

TurboQuote

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Making a Report

Select the customer. Use the drop down menu to find the customer you want.

Then just click on the Generate Report button, and the tool will download a CSV (spreadsheet) file which you can open and manipulate on your own.

By the way, if you would like us to build you a custom report, we'd be happy to do that for you, Just contact eTurboTools Incorporated and we'll get right on it.





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Making a Report

Your can change the lot sizes you want calculated by clicking on the EDIT LOT SIZES link. Just edit the numbers in each of the fields, and save when completed. The next time you generat a report, you will notice calculations for each lot size.



You can delete and add lot sizes. To add a new size, simply click on the ADD SIZE button, and add the new entry in the box.

To delete a Lot Size, just select the box and delete the value. When you click SAVE, the updates will be saved.



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Making a Report: Custom Reports



Pricing Development Tool

Dashboard for E Turbo	Tools Product	Price Model	Customers	Data Tables	Users	Reports	Logout
Quotes		Custor	ners		Da	Quote Summ	ary by Customer ary by Custom Search
Quotes Not Started: Quotes In Progress: Finished Quotes: Total Quotes: Oldest RFQ:	18 23 2 43 2012-12-08	Total Cu	stomers: 4		Labe Matl [®] Purch	Tables Updated:	2013-08-21 2013-08-26

You can also create custom summary reports by using our selection screen.

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Making a Report: Custom Reports

Every estimate that appears in the Results screen will be included in the Summary Report.

iearch:		_	Results:	
Customer: Show Quotes After:	First Class Bakery 2013-08-13	•	First Class Bakery-Pies-Test-123 First Class Bakery-Pies-TEST PIE-2	
Target Date: Salesman:	BrianKrichbaum	•		
Cost Estimator: Proposa l I D;		•		
Customer Quote ID:				
Product Name: Product Line:		•		Senerate Report
Keyw ord:				
Status:	In Progress	-		

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Making a Report: Sample

Quote summary for custom search criteria 8/27/2013

QIN	Cust Quote ID	Customer Name	Product Line	Product Name	Keyword	Status	Setup	Labor	Variable	Fixed	Consumable	Material	Purchased	Ad Hoc	Shipping	Capital	Tooling	Development
20121213-4631	0	First Class Bakery	Pies	TEST PIE	0	In Progress	2.8	0.125	0.3125	0.2625	0	4.9865	0.8143125	111	1	0	0	0
20121222-7259	PP - 0001	First Class Bakery	Pies	Peach Pie	Peach Pie	In Progress	52.5	0.8216666	1.830832	1.7255	0	12.3605	0.55935207	0	0.12	0	0	0
20130329-6576	234	First Class Bakery	Pies	Cherry Pie-A	Pie	In Progress	7.3	0.372499966	0.83874933	0.78225	0	5.1165	0	0	0	0	0	0
20130401-2140	234	First Class Bakery	Pies	Cherry Pie-a	Pie	In Progress	7.3	0.372499966	0.83874933	0.78225	0	6.1110454	0	0	0	0	0	0
20130401-6168	123456	First Class Bakery	Pies	TEST	TEST1	In Progress	0	0	0	0	0	5.6447822	0	0	0	0	0	0
20130405-7766	234	First Class Bakery	Pies	Cherry Pie-AC	Pie	In Progress	7.3	0.372499966	0.83874933	0.78225	0	5.1165	0	0	0	0	0	0
20130411-856	234	First Class Bakery	Pies	Cherry Pie-	Pie	In Progress	7.3	2.222499966	4.91374933	4.66725	0	6.2105	0	0	0	0	0	0
20130509-891	123	First Class Bakery	Pies	Large Cherry Pie-hhjj	SAMPLE	In Progress	2.8	3.825	8.4625	8.0325	0	7.0505	0	0	0	0	0	0
20130523-6650	1234	First Class Bakery	Bread	Test	Sample	In Progress	6.07	1.605	3.5725	3.3705	0	9.9125	1	0	0.12	0	0	0
20130728-1232	111	First Class Bakery	0	test54-1	0	In Progress	2.8	0.125	0.3125	0.2625	0	4.9865	0	0	0	0	0	0
20130728-6129	111	First Class Bakery	Pies	test54	0	In Progress	2.8	0.125	0.3125	0.2625	0	4.9865	0.295	0	0	0	0	0
20130812-4309	123	First Class Bakery	Pies	Custard	0	In Progress	0	0	0	0	0	0	0	0	0	0	0	0
20130813-6843	123	First Class Bakery	Pies	Test	0	In Progress	0	0	0	0	0	0	0	0	0	0	0	0
20130815-6560	0	First Class Bakery	Pies	TEST PIE-2	0	In Progress	2.8	0.125	0.3125	0.2625	0	4.9865	0	0	0	0	0	0

The summary reports display the information about the estimates selected and shows the costs breakdown in each category.

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Ma	kin	g a	Re	epo	rt:	Sar	np	le		
Quote summary for custom	search criteria									
8/27/2013										
QIN	1	2	5	10	25	50	100	200	650	1200
20121213-4631	121.3008125	119.9008125	119.0608125	118.7808125	118.6128125	118.5568125	118.5288125	118.5148125	118.5051202	118.5031458
20121222-7259	69.91785067	43.66785067	27.91785067	22.66785067	19.51785067	18.46785067	17.94285067	17.68035067	17.4986199	17.46160067
20130728-6129	8.7815	7.3815	6.5415	6.2615	6.0935	6.0375	6.0095	5.9955	5.985807692	5.983833333
20130815-6560	8.4865	7.0865	6.2465	5.9665	5.7985	5.7425	5.7145	5.7005	5.690807692	5.688833333

On the far right of the report are several columns. The top rows is the lot size, or number of units produced. The subsequent rows of data are the average cost (dollars) per unit for the each lot size.

As the number on top gets larger, the number on the bottom gets smaller. With larger lots, the setup cost is distributed over a larger quantity of parts.

Each record in the database that matches the selections picked will be shown row in this report.

Note that the costs shown in this report are generated in real time, that is they represent the current costs in your system, not the costs when the proposal was developed.

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Making a Report

Quote summary for First Class Bakery 8/27/2013

QIN	Cust Quote ID	Customer Name	Product Line	Product Name	Keyword	Status	Setup	Labor	Variable	Fixed	Consumable	Material	Purchased	Ad Hoc	Shipping	Capital	Tooling	Development
20121213-4631	0	First Class Bakery	Pies	TEST PIE	0	In Progress	2.8	0.125	0.3125	0.2625	0	4.9865	0.8143125	111	1	0	0	0
20121222-7259	PP - 0001	First Class Bakery	Pies	Peach Pie	Peach Pie	In Progress	52.5	0.8216666	1.830832	1.7255	0	12.3605	0.55935207	0	0.12	0	0	0

In summary reports, only the cost results are shown, Most items are self-explanatory, but I'll summarize here.

QIN => Quote Identification Number is a serialized, unique identifier that is automatically assigned when the RFQ is issued. This is how we keep track of proposals even if the parts have the same name. Quote summary for First Class Bakery 8/27/2013

QIN	Cust Quote ID	Customer Name	Product Line	Product Name	Keyword	Status
20121213-4631	0	First Class Bakery	Pies	TEST PIE	0	In Progress
20121222-7259	PP - 0001	First Class Bakery	Pies	Peach Pie	Peach Pie	In Progress

Name => The name assigned when the RFQ was first issued. Status => Current status of the RFQ



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Making a Report

uote summary fo 8/27/2013	r First Class B	akery														
QIN	Cust Quote ID	Customer Name	Product Line	e Product Name	e Keyword	Status	Setup Labor	Variable F	ixed Consumable	Material	Purchased	Ad Hoc Shi	ipping Capita	I Tooling	Development	
20121213-4631	0	First Class Bakery	Pies	TEST PIE	0	In Progress	2.8 0.125	0.3125 0	2625 0	4.9865	0.8143125	111	1 0	0	0	
0121222-7259	PP - 0001	First Class Bakery	Pies	Peach Pie	Peach Pie	In Progress	52.5 0.8216666	1.830832 1	7255 0	12.3605	0.55935207	0 0	0.12 0	0	0	
			Setup	Labor	Variable	Fixed	Consumable	Materia	l Purchased	Ad Hoo	: Shippin	g Capit	al Toolir	ng Deve	elopment	
			2.8	0.125	0.3125	0.2625	0	4.9865	0.8143125	111	1	0	0		0	
			52.5	0.8216666	1.830832	1.7255	0	12.3605	0.5593520	0	0.12	0	0		0	

The setup cost is dollars per setup. Whether one or one thousand pieces is produced at a time, the set-up cost remains the same.

The remaining costs shown here are all in dollars / unit. This shows how much cost is expected in each category for a single unit.



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Pricing Development Tool

Dashboard for E Turb	o Tools	Product Price Model	Customers	Data Tables	Users	Reports	Logout
Quotes		Custor	ners		Da	Quote Summ Quote Summ	ary by Customer ary by Custom Search
Quotes Not Started: Quotes In Progress: Finished Quotes: Total Quotes: Oldest RFQ:	18 23 2 43 2012-12-	Total Cu	stomers: 4		Lab Matl Purch	<u>Tables</u> Updated: <u>Items</u> Updated:	2013-08-21 2013-08-26

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The Quote Detail report shows every detail of an estimate.

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Select Q	uote:		
First Cla	ss Bak	ery-20130824-	96 💌
Advanc	ed Se	arch	
Lot Size: Margin:	12		
Margin:	30	%	
Margin:		%	

You can customize the detail reports for each estimate you work on.

If you'd like to change the lot size, or change or add Gross Margin analysis point, do it here. Just click on the ADD MARGIN button, and a new box will appear. If you want to delete a Gross Margin, just delete the entry and it will be gone.

eTurboQuote remembers the changes, so when you come back to this estimate, your work will be saved.



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Quote Detail	×
Select Quote:	
First Class Bakery-20130824-96	×.
Advanced Search	
Lot Size: 12 Margin: 25 %	
Add Margin	
Generate Report	

You can select an estimate from the drop down menu if you know the customer name and QIN, or choose the advanced search button and our selection screen will appear.

Quote Summar	Ŷ			
Search:			Results:	
Customer	First Class Bakery		First Class Bakery-Res-Test-123-	
Show Quotes Aftec	2013-08-13		First Class Bakery-Pies-TEST PIE-2	
Show Quotes Before:	2013-08-15			
farget Date:				
Salesman:	BrianKrichbaum			
Cost Estimator.				
roposal ID:	[
Customer Quote ID:	[
hoduct Name:				-
hoduct Line:	L	-	Gener	ate Report
Keyword:	C			
Status:	In Progress			
O Match any criteria	P Match all criteria			



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When you have made all your choices, click on the GENERATE REPORT button and we will create your detailed report.

Click the Generate Report button, and open the CVS file with your spreadsheet software.

Quote Detail	×
Select Quote:	
First Class Bakery-20130824-9	6 💌
Advanced Search	
Lot Size: 12 Margin: 25 %	
Margin: 30 %	
Margin: %	
Add Margin	
Generate Report	

TurboQuote

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Like the summary reports, the detail reports are created in real time, meaning that the costs shown represent current results, not the results generated when the proposal was first developed.

In the upper left corner there is a Proposal information summary. It includes necessary information to keep track of each proposal.

Quote detail for 20121113-6823 Customer: First Class Bakery Product Line: Pies Product: Apple Pie Customer Quote ID: 111111 Proposal Number: 1 Lot Size: 25 8/27/2013

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Level 1 - Pie Crust	Type=Piece	Quantity=1	ID=170	
LEVEL 1 TOTAL				

The levels are individually detailed. The top line identifies the level number, name, type, and quantity. The last line provides the total costs for the particular level. In between are all the details for the level being detailed. In this example, Level 1 is for a Pie Crust. At the bottom of each level, you will find a dashed line to separate it from the following level.

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Making a Report

Level 1 - Pie Crust	Type=Piece	Quantity=1	ID=170						
Level 1 Labor									
Operation	Hours	Hourly Rate (\$)	Subtotal/Unit	Var Overhead	Fixed Overhead	Level Quantity	Setup Cost/Level	Total Cost	
Roller	0.008333333	22	0.183333333	0.366666667	0.385	1	0	0.935	
Mixer	0.008333333	15	0.125	0.3125	0.2625	1	0	0.7	
Total								1.6349993	
Level 1 Materials									
Material	Description	Per Unit Cost	Units	Units Yield	Scrap Loss	Consumables	Level Quantity	Total Cost	
Flour	White Per Cup	0.052	2.5 C	1	0%	0	1	0.13	
Shortening	Crisco Dry Measure	1.094	2.5 C	1	0%	0	1	2.735	
Total								2.865	
Level 1 Purchased Parts	5								
Part Number	Description	Unit Price	Part Quantity	Units Yield	Scrap Loss	Subtotal/Unit	Shipping/Unit	Level Quantity	Total Cost
Salt - 1	Salt - I	0.295	0	1	0	0	0	1	0
Salt - 1	Salt - I	0.295	0.02	1	0	0.0059	0	1	0.0059
Total									0.0059
LEVEL 1 TOTAL							4.5058993	ł	

Here is the Level 1 summary for the proposal shown on the previous page. Notice that each category of the proposal is detailed out, showing each cost element.

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Making a Report

Level Type	Setup	Labor	Consumables	Variable Overhead	Fixed Overhead	Purchased Parts	Material	Ad Hoc	Shipping	Total	Sales Price with 25% margin	Sales Price with 30% margin
Piece	0.112	0.5133	0	1.151666	1.078	0.5454	7.8515	0	0.12	11.371	15.16	16.25
Tooling	0	0	0	0	0	0	0	0	0	0	0	0
Capital	0	0	0	0	0	0	0	0	0	0	0	0
Development	0	0	0	0	0	0	0	0	0	0	0	0

At the very bottom, you will find a rollup of cost for the entire proposal. On the right you will find the sales price calculated for each of the Gross Margin Analysis points you entered earlier.

FYI – The formula for sales price looks like this:

Cost / (1-Margin %) = Sales Price

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Glossary

RFQ – Request for Quote Net Margin -Gross Margin -Percentage Gross Margin -Lot Size Keyword Activity Cost Center **Operational** Costs Material Costs Purchasing Costs Labor Costs Fixed Costs Variable Costs **Tooling Costs** Capital / Investment Costs

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