

INSTALLATION

Please follow the installation instructions from the Setup PDF menu of the Install program.

IT NOTES

For ME systems that use SQL Server for the estimate library please check the following fields in the SQL Server database. If they are defined as field type Bit, please change them to field type Int.

[ESTTABLE]. [COMPONENT]

[ESTTABLE]. [ORDERSTATUS]

[ESTTABLE]. [RFQOPEN]

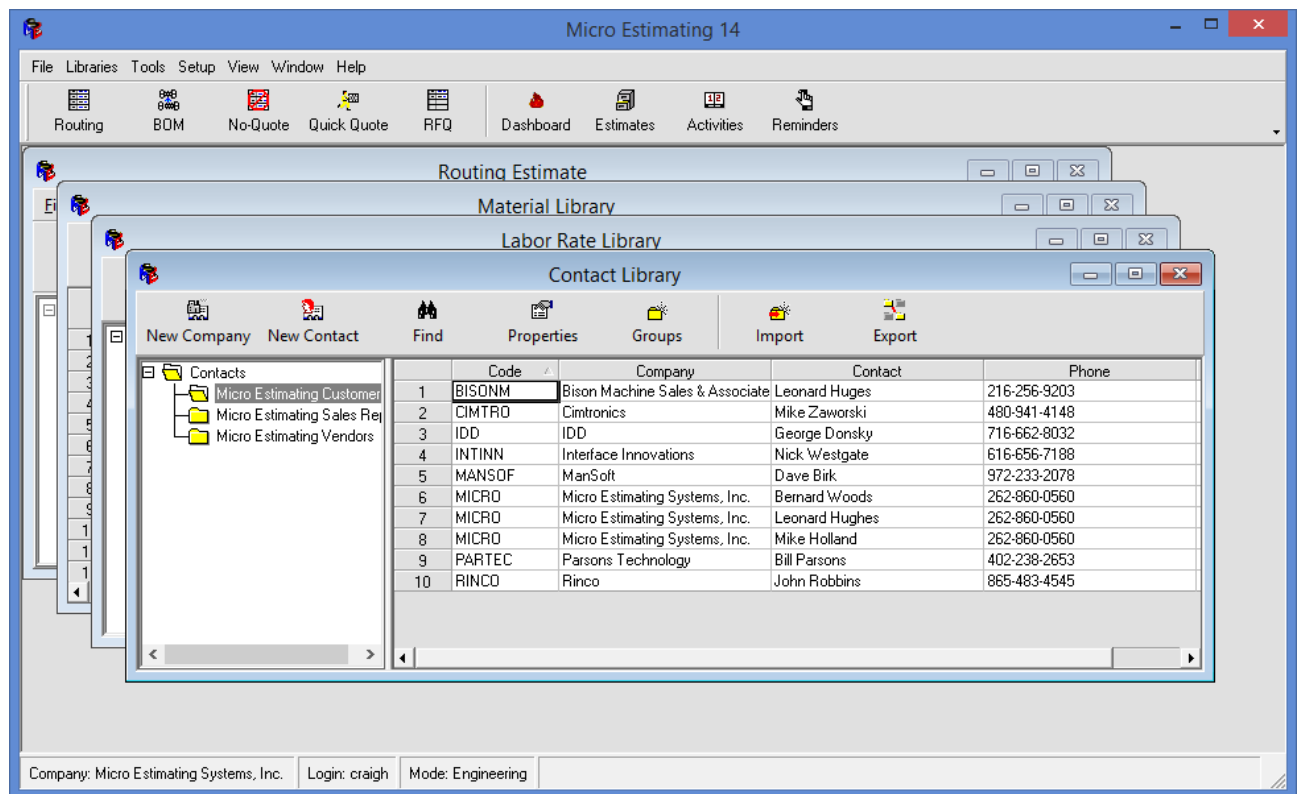
[ACTIVITYTABLE]. [ACTIVITYREMINDERFLAG]

[ACTIVITYTABLE]. [ACTIVITYDONEFLAG]

If you create .RFQ files to import E-RFQ's into ME, the import folder has been changed to \\servershare\msewin\estimate\import\RFQ. Please adjust your utility to place the .RFQ files in the new folder.

What's New!

The Control Panel



Micro Estimating 14 has a new **Control Panel** Window to manage all sub-forms allowing easy access to estimates, libraries, and tools. Open forms can be cascaded, and the entire application can be minimized at once. The Windows Start menu is no longer used to manage open forms. New estimates are created directly from the Control Panel. The Reminders tool will be highlighted in green if any reminders are due.

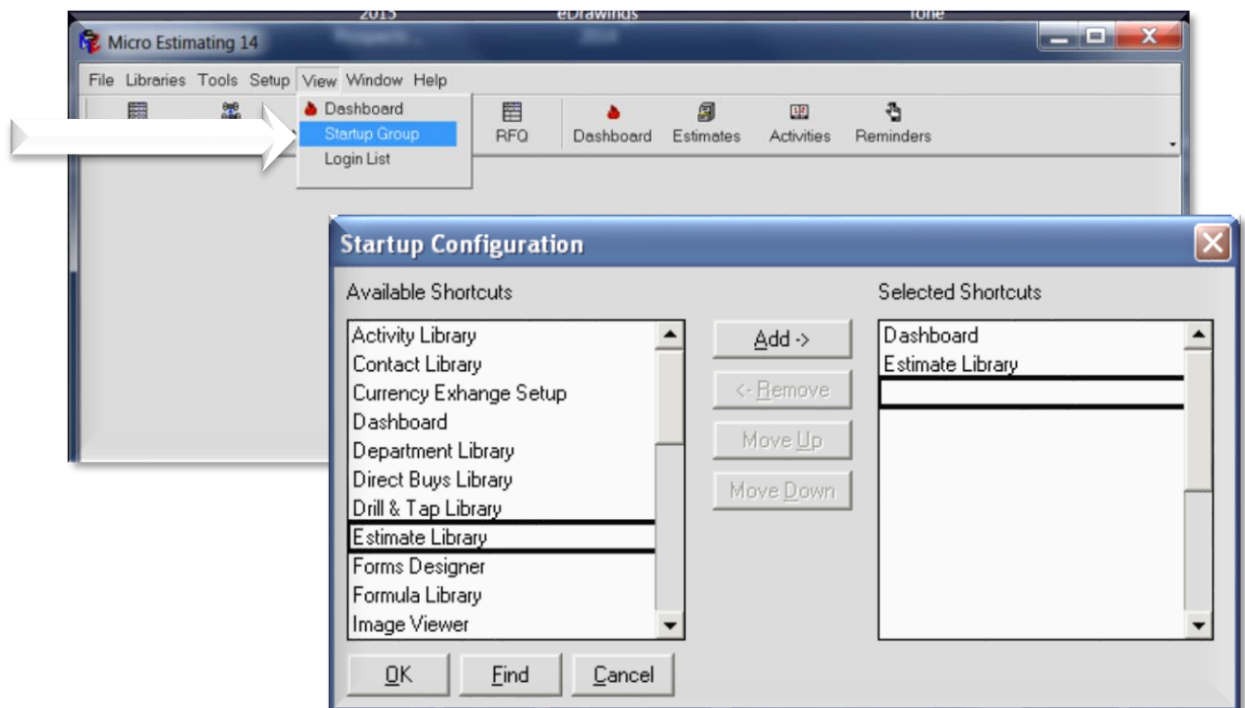
Most forms have been converted from buttons at the bottom of the form to toolbars at the top of the form with user-friendly captions. A form that requires a decision, such as OK/Cancel, will have toolbar buttons for this selection rather than buttons at the bottom of the form. Forms, such as libraries that simply require a close, use the Windows X button at the top right of the window to close the form.

Highlighted buttons, such as Notes, where the highlight indicates data behind the button have been converted to toolbar icons where a Green caption indicates existing data.

Startup Group

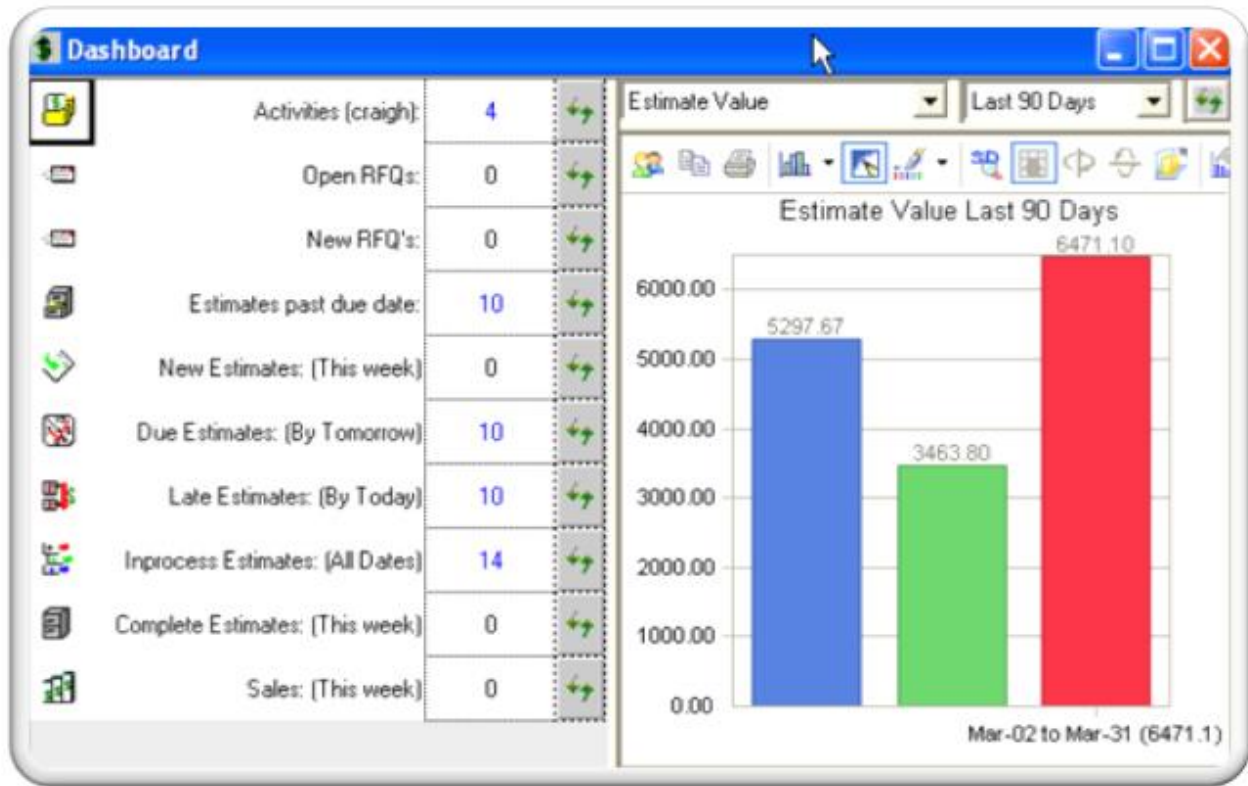
In previous versions of Micro Estimating, the estimate library was displayed on startup. Micro Estimating 14 will open an empty Control Panel window.

A Setup, **Startup Group** utility has been added to allow you to set any libraries or tools you want to load on startup.



Dashboard

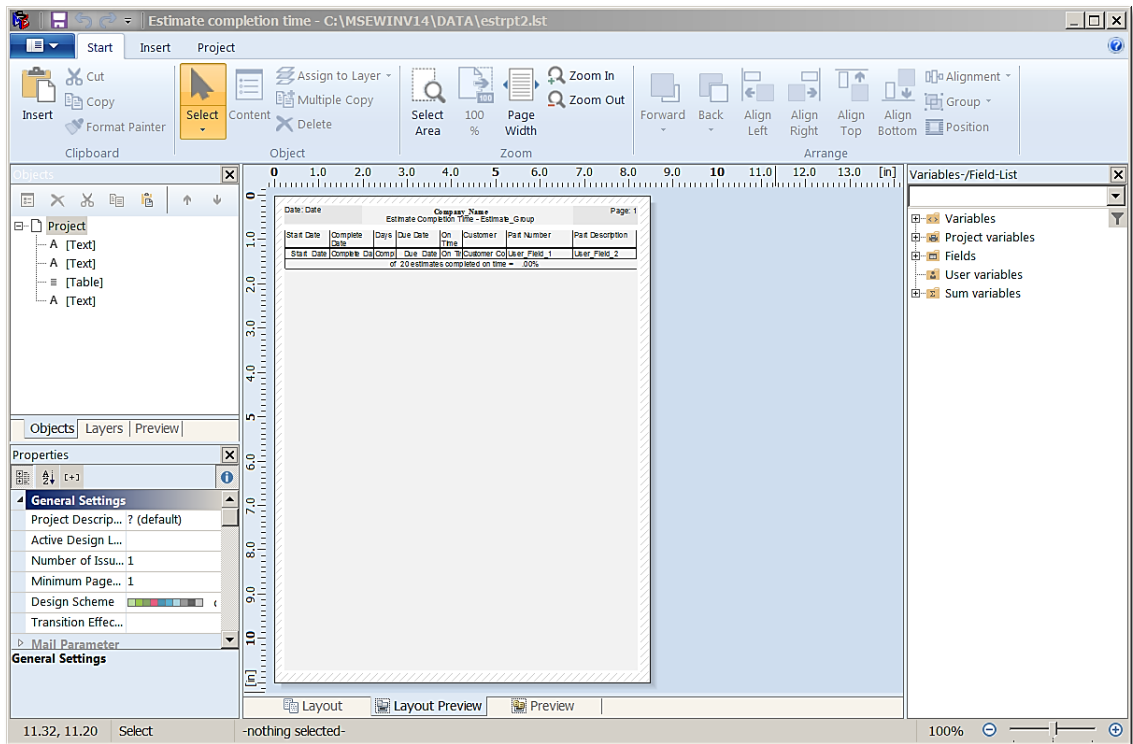
A new **Dashboard** utility has been added to display various status information. This form can be set to display at startup.



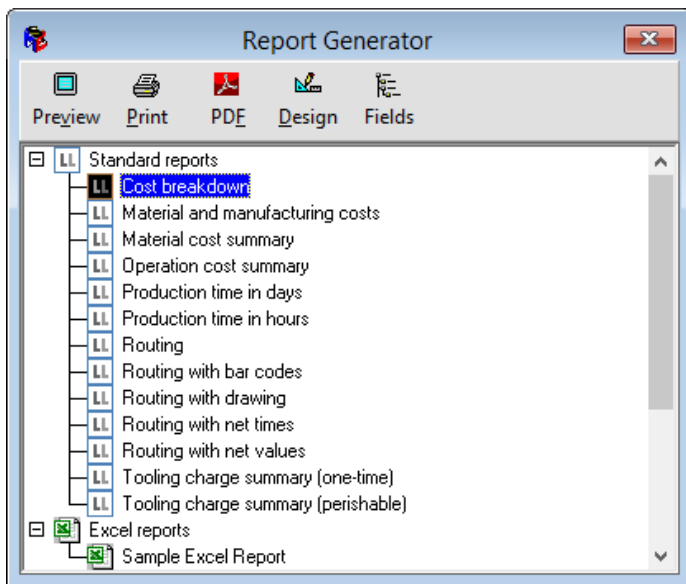
New Estimate Type Names

The previous nomenclature for assembly estimates has been changed from BOM to Assembly. Single part estimates has been changed from Routing to Part. This change more accurately describes the type of estimate being created. New Estimates & RFQ's are also created directly from the Control Panel without needing to first open the Estimate Library.

Upgraded Report Generator



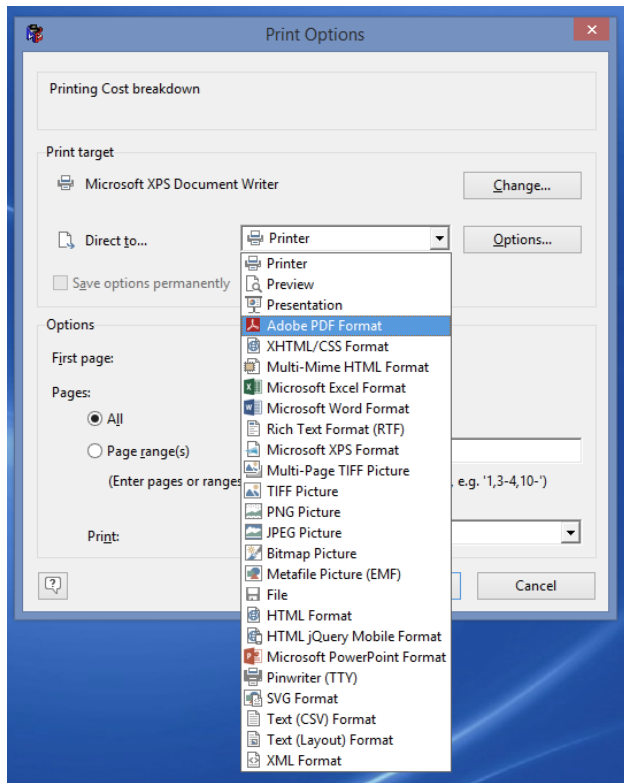
Micro Estimating V14 Upgraded Report Generator *



There is a new report designer screen and simplified toolbar. This new version will make designing reports easier and faster.

Excel reports are now integrated along with Standard reports, and file types such as PDF's, which are available for printing, saving, and emailing.

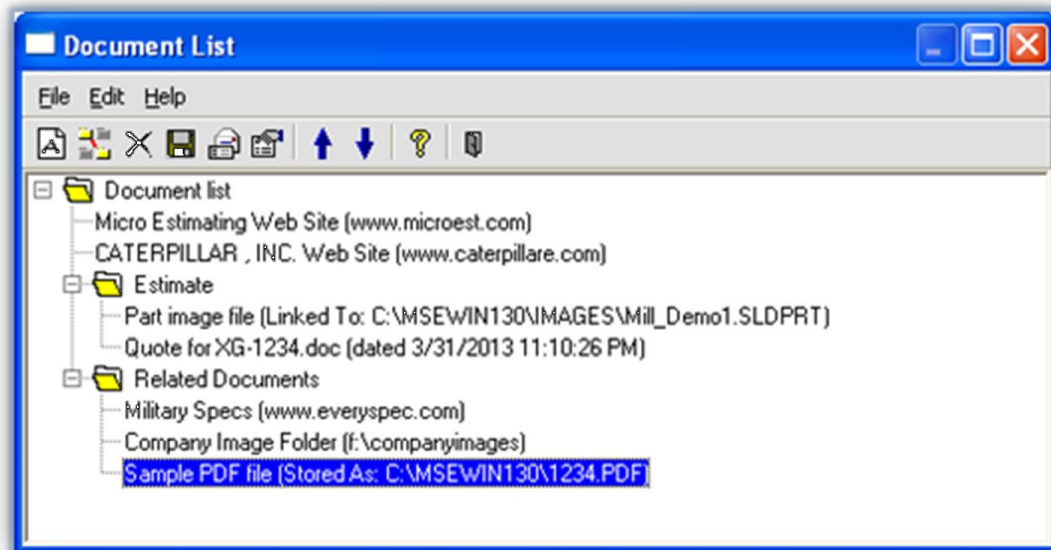
**The report designer is an optional program feature.*



One of the newest features is the ability to set the email **To address** for a report to either a fixed value or to the value of one of the report fields.

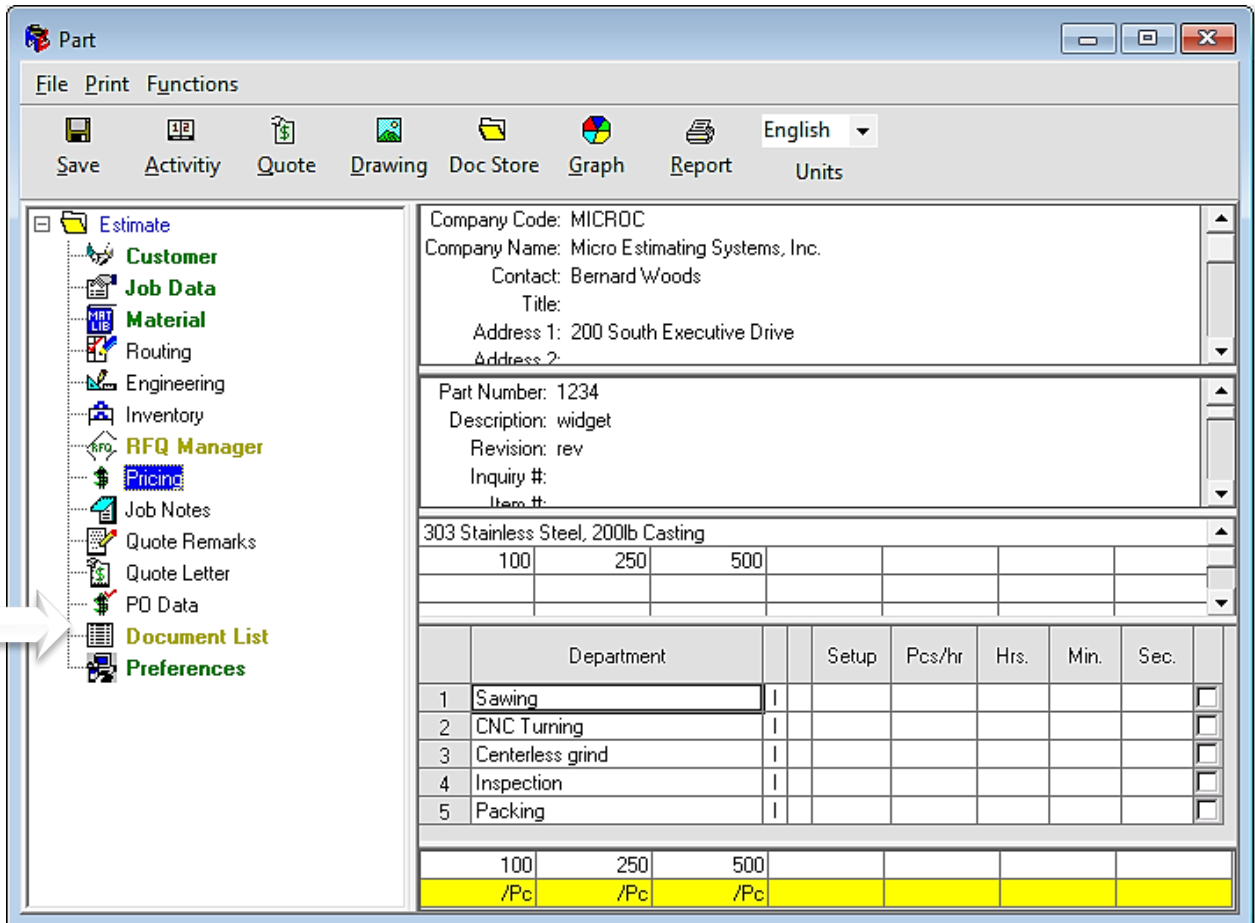
The User Manual for the report Generator can be viewed or printed from the V14 DVD.

Document List



Micro Estimating 14 now has the ability to set default linked documents via the Setup, Document Links control panel menu. This allows you to setup standard documents to link to every estimate. Excel documents can also be defined with data to populate from the estimate into the Excel document. Documents can be set to either link to files on the network, or copies of the document can be stored with the estimate. Document Folders can also be defined to point to document folders on your network. The Document List also allows storing files of all sorts, such as email files, with the estimate via the Explore tool.

Document Store

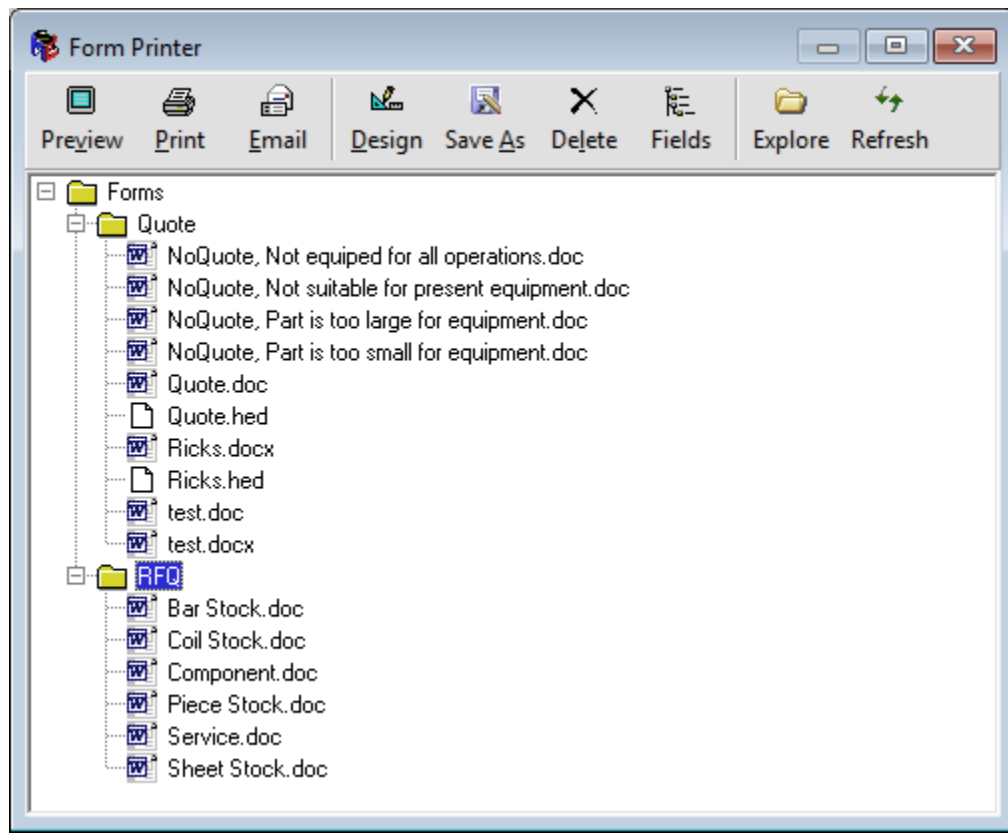


The screenshot shows the 'Part' software window. The left sidebar contains a tree view with the following items: Estimate, Customer, Job Data, Material, Routing, Engineering, Inventory, RFQ Manager, Pricing, Job Notes, Quote Remarks, Quote Letter, PO Data, Document List (highlighted with a white arrow), and Preferences. The main window has a menu bar with File, Print, and Functions. Below the menu bar is a toolbar with icons for Save, Activity, Quote, Drawing, Doc Store, Graph, and Report. The 'Doc Store' icon is highlighted. The main area displays a form for 'Company Code: MICROC', 'Company Name: Micro Estimating Systems, Inc.', 'Contact: Bernard Woods', 'Title:', 'Address 1: 200 South Executive Drive', 'Address 2:', 'Part Number: 1234', 'Description: widget', 'Revision: rev', 'Inquiry #:', 'Item #:', '303 Stainless Steel, 200lb Casting', and a table with columns for Department, Setup, Pcs/hr, Hrs, Min, and Sec. The table contains 5 rows of data: 1 Sawing, 2 CNC Turning, 3 Centerless grind, 4 Inspection, and 5 Packing. The bottom row of the table is highlighted in yellow.

	Department	Setup	Pcs/hr	Hrs.	Min.	Sec.
1	Sawing	I				
2	CNC Turning	I				
3	Centerless grind	I				
4	Inspection	I				
5	Packing	I				
	100	250	500			
	/Pc	/Pc	/Pc			

The Doc Store tool allows you to store any related documents with the estimate. These files will be archived and store permanently with the estimate. Any document or link that can be dropped into a Windows Explorer folder can be saved.

Form Printer



The form printer (Quotes, RFQ's, etc.) has been upgraded to support both the hed form type as well as Microsoft Word .doc and .docx formats. It is highly recommended that you upgrade all forms from the old hed file format to Microsoft Word format. The hed designer has a File, Save as Word Template to help in this conversion although the merge fields will have to be re-inserted using the Microsoft Word designer.

Microsoft Office Document Types

The latest Microsoft Office document types, **.xlsx** and **.docx**, are now supported in the Form package, estimate Excel linked documents, estimate export, Excel reports, and the Excel workcenter.

Easy Setup for Terminal Server

Micro Estimating 14 was designed and built for easy terminal server (or Citrix) functionality. The previous c:\msewin client folder has been moved to a windows managed folder based on user name. Just give the user a shortcut and they can run. The client folder will be automatically created.

Upgraded Company Setup

The screenshot shows the 'Company Setup' dialog box. On the left, a tree view under 'Companies' has 'Micro Estimating Systems, Inc.' selected. The right pane contains the following fields:

Company Name:	Micro Estimating Systems, Inc.
Address 1:	200 Executive Dr.
Address 2:	
City:	Brookfield
State:	WI
Zip/Postal Code:	53005
Phone:	(262) 860-0560
Fax:	(262) 860-0561
System Mode:	Cost estimating
Data Folder:	C:\MSEW\INV14\DATA\
Estimate Folder:	C:\MSEW\INV14\ESTIMATE\

The Data and Estimate folders have been moved from Preferences into the Setup, Company Data utility.

Upgraded User Setup

The screenshot shows the 'User Setup' dialog box. The top menu bar includes: Save, New User, Clone, Move, Delete, Rename, New Folder, and Refresh. Below the menu are three checkboxes: ☐ Use Windows Login, ☐ Auto Create Users, and ☐ View Locked Functions Only. The left pane shows a tree view under 'Folders and Users' with 'Adimistrator' (containing 'USER1' and 'USER4') and 'Estimators' (containing 'USER2' and 'USER3') selected. The right pane contains the following fields:

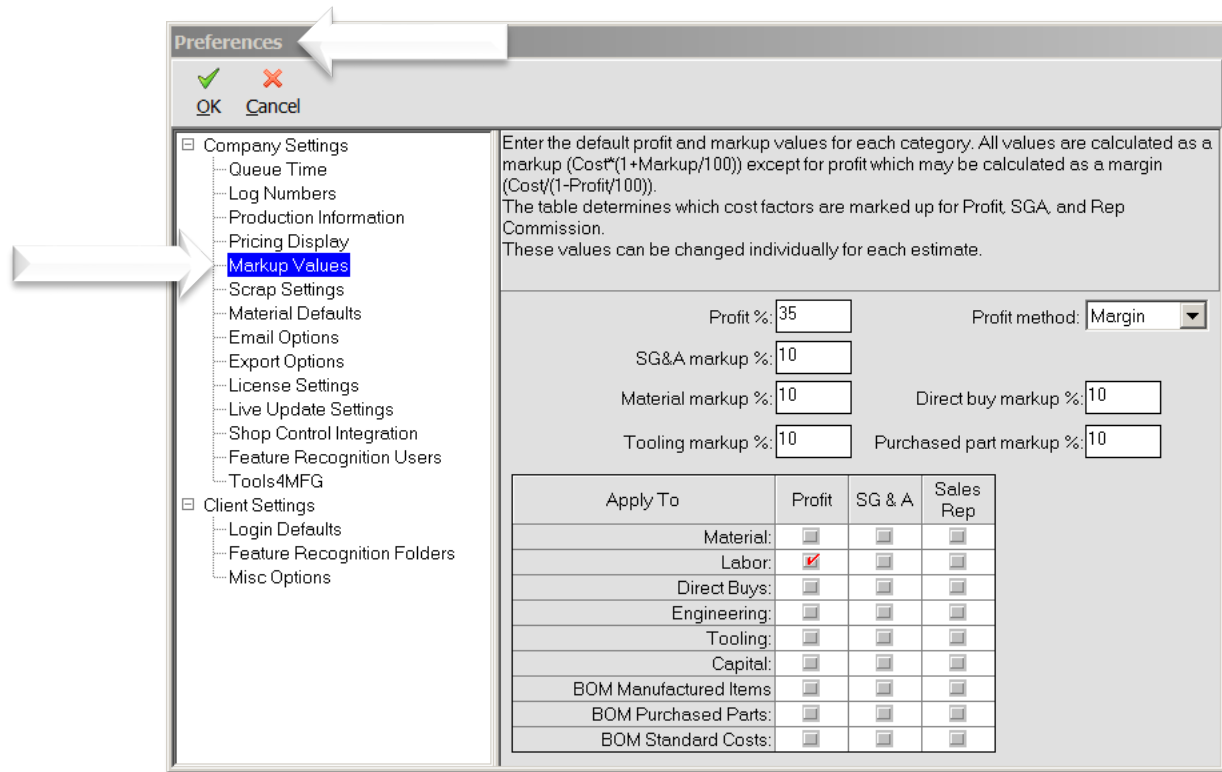
Code:	USER1
Name:	Jim Lurtsema
Password:	
Phone:	262.860.0560 x115
Fax:	
Email:	jiml@microest.com
Disabled:	<input type="checkbox"/>

Below these fields is a table with two columns: 'Locked' and 'Function'.

Locked	Function
<input type="checkbox"/>	Customer Library (Edit)
<input type="checkbox"/>	Customer Library (Export)
<input type="checkbox"/>	Dept Maintenance
<input type="checkbox"/>	Estimate Library (Edit)
<input type="checkbox"/>	Estimate Library (Setup)
<input type="checkbox"/>	Estimate Library (Delete)
<input type="checkbox"/>	Estimate Export
<input type="checkbox"/>	Copy To Folder

The user setup dialog box has been updated to look more modern. Menu items have moved to the top of the dialog window. **Auto Create Users** has been added when checking **Use Windows Login**. When Use Windows Login is selected, the ME user is assumed based on the logged in Windows user.

Upgraded Markup Value/Pricing Structure



Preferences

OK Cancel

Company Settings

- Queue Time
- Log Numbers
- Production Information
- Pricing Display
- Markup Values**
- Scrap Settings
- Material Defaults
- Email Options
- Export Options
- License Settings
- Live Update Settings
- Shop Control Integration
- Feature Recognition Users
- Tools4MFG

Client Settings

- Login Defaults
- Feature Recognition Folders
- Misc Options

Enter the default profit and markup values for each category. All values are calculated as a markup ($\text{Cost} \times (1 + \text{Markup}/100)$) except for profit which may be calculated as a margin ($\text{Cost}/(1 - \text{Profit}/100)$). The table determines which cost factors are marked up for Profit, SG&A, and Rep Commission. These values can be changed individually for each estimate.

Profit %: Profit method:

SG&A markup %:

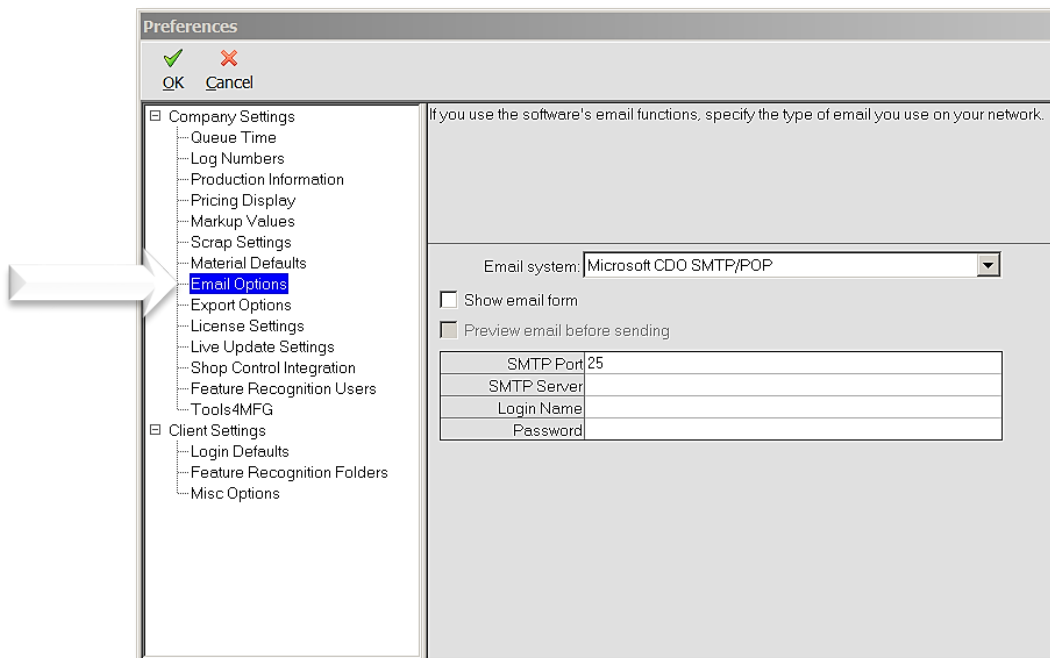
Material markup %: Direct buy markup %:

Tooling markup %: Purchased part markup %:

Apply To	Profit	SG & A	Sales Rep
Material:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Labor:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Direct Buys:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engineering:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tooling:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Capital:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BOM Manufactured Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BOM Purchased Parts:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BOM Standard Costs:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Markup values and the Pricing structure have been combined into one location for easy access.

Upgraded Email Options



Preferences

OK Cancel

Company Settings

- Queue Time
- Log Numbers
- Production Information
- Pricing Display
- Markup Values
- Scrap Settings
- Material Defaults
- Email Options**
- Export Options
- License Settings
- Live Update Settings
- Shop Control Integration
- Feature Recognition Users
- Tools4MFG

Client Settings

- Login Defaults
- Feature Recognition Folders
- Misc Options

If you use the software's email functions, specify the type of email you use on your network.

Email system:

☐ Show email form

☐ Preview email before sending

SMTP Port	<input type="text" value="25"/>
SMTP Server	<input type="text"/>
Login Name	<input type="text"/>
Password	<input type="text"/>

Options for Microsoft CDO SMTP/POP have been added. This allows you now to easily access more email accounts such as Gmail. A feature to **Show email form** and **Preview email before sending** has been added.

Upgraded Thread Library

Thread Library								
<div> <div> <div></div> <div></div> </div> <div> <div>Add</div> <div>Delete</div> </div> </div>								
	Description	Lookup 1	Lookup 2	Diameter Δ	Thread Pitch	Thread Length	Drill Number	Drill Diameter
61	#46 Drill			.0810			46	.0810
62	2-64 Tap	2	64	.0850	64.0000		50	.0700
63	2-56 Tap	2	56	.0850	56.0000		50	.0700
64	#44 Drill			.0860			44	.0860
65	M 2.2x0.25	0.086614	101.6002	.0866	101.6002			.0768
66	#41 Drill			.0960			41	.0960
67	3-56 Tap	3	56	.0980	56.0000		45	.0820
68	#40 Drill			.0980			40	.0980
69	3-48 Tap	3	48	.0980	48.0000		47	.0785
70	M 2.5x0.35	0.098425	72.57157	.0984	72.5716			.0827

Metric taps have been added to the Thread Library

Upgraded Shop Control Integration

Preferences

OK Cancel

☒ Company Settings

- Queue Time
- Log Numbers
- Production Information
- Pricing Display
- Markup Values
- Scrap Settings
- Material Defaults
- Email Options
- Export Options
- License Settings
- Live Update Settings
- Shop Control Integration**
- Feature Recognition Users
- Tools4MFG

☒ Client Settings

- Login Defaults
- Feature Recognition Folders
- Misc Options

This topic contains settings for integrating with various shop control systems. Select the shop control system you wish to integrate with and set the specified parameters.

Shop control system: JobBoss

Connection:	
Login:	
Password:	
Material Cost Value:	Standard
Purchased Item Cost Value:	Standard

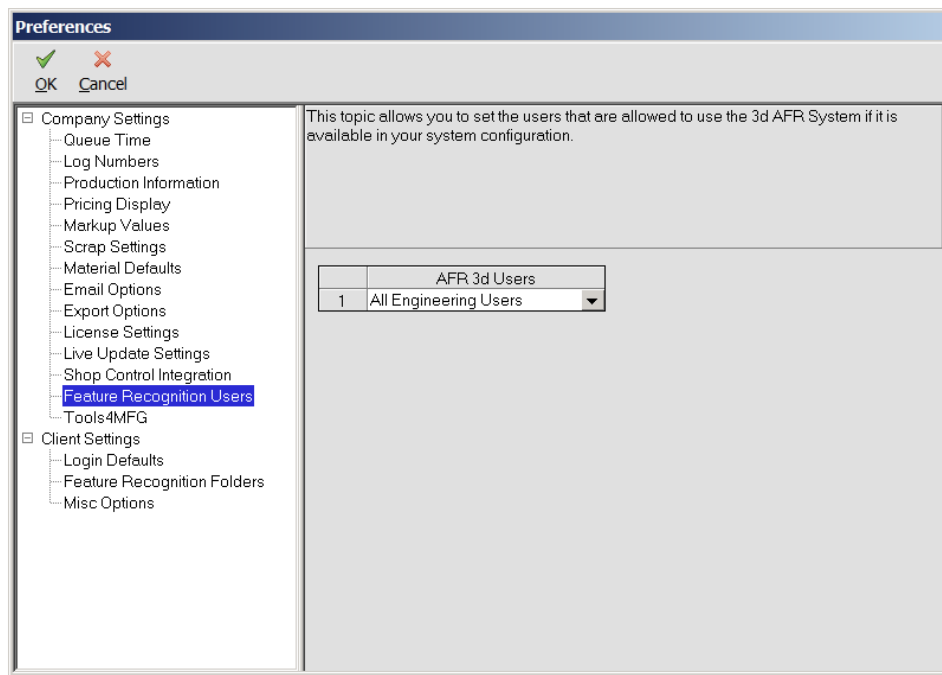
	Import
Customers:	On Demand
Vendors:	On Demand
Sales Reps:	On Demand
Raw Materials:	On Demand
Purchased Parts:	On Demand

Optional ERP Interfaces

ERP Interfaces			
<input checked="" type="checkbox"/> Global Shop	<input checked="" type="checkbox"/> ProfitKey	<input checked="" type="checkbox"/> Vantage	<input checked="" type="checkbox"/> Visual Mfg
<input checked="" type="checkbox"/> JobBoss	<input checked="" type="checkbox"/> RealTrak	<input checked="" type="checkbox"/> Vista	<input checked="" type="checkbox"/> Oracle Mfg
<input checked="" type="checkbox"/> M1	<input checked="" type="checkbox"/> ShopTech E2	<input checked="" type="checkbox"/> Visual EstiTrak	<input checked="" type="checkbox"/> QuickBooks

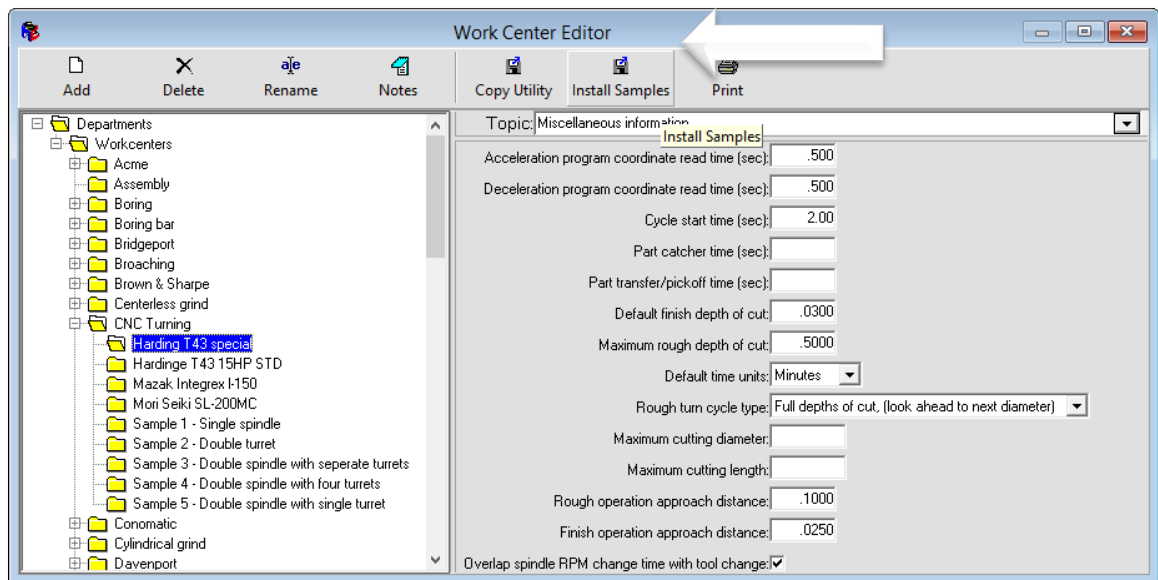
In prior versions of Micro Estimating, customers, vendors, sales rep, raw materials and purchased parts were loaded from the ERP system every time an estimate was opened. Now Micro Estimating imports the data into the Micro Estimating database for faster access. This is done ***On Demand, Once Daily, or Every Startup***. This allows faster startup for new and existing estimates. The On Demand imports can be scheduled to run using the Windows Task Scheduler allowing you to update this information on off-hours.

Upgraded Feature Recognition Users



If the number of **Feature Recognitions Users** is less than the number of **Engineering Users**, you are able to set which **Engineering Users** have rights to use the **Feature Recognition**.

Upgraded Work Center – New Machine Tools



Additional Milling and Turning Machines have been added to the Work Center Editor. To add machines, use the Install Samples function.

Upgraded RFQ Manager

New Email RFQ

Notes | Email | Preview | Groups | Templates

Item: Mat: 1018 Steel 2.0000" round, 12' bar

Description: Mat: 1018 Steel 2.0000" round, 12' bar

RFQ Number: 50

Quote Due Date: 3/31/16

Email Template: Raw Material.txt

Form Template: RFQ\Bar Stock.doc

Subject Line: RFQ from Micro Estimating Systems, Inc.

Direction: Please reply via email with a quote for the specified item.

Reply To:

Submit To:

CC:

BCC:

Attachments:

Contact Group: Steel Vendors.xml

Contact List:

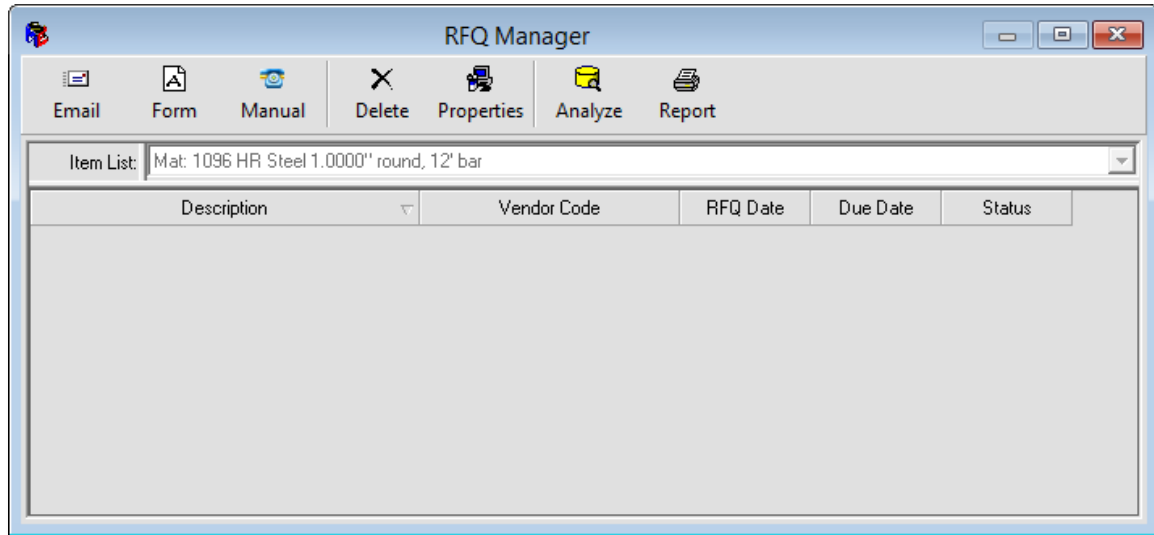
Code	Company	Contact
MICROV	Micro Estimating	Bernard Woods
MICROV	Micro Estimating	Craig Hoffmann
1026	ACCLIPROMPT	Scott Hoffmann

☒ Attach E-Docs

☐ Preview each email before sending.

The RFQ Manager has undergone several improvements. First, there are two new RFQ types available; Email and Manual. The manual RFQ is for recording RFQ pricing based on faxes or phone calls.

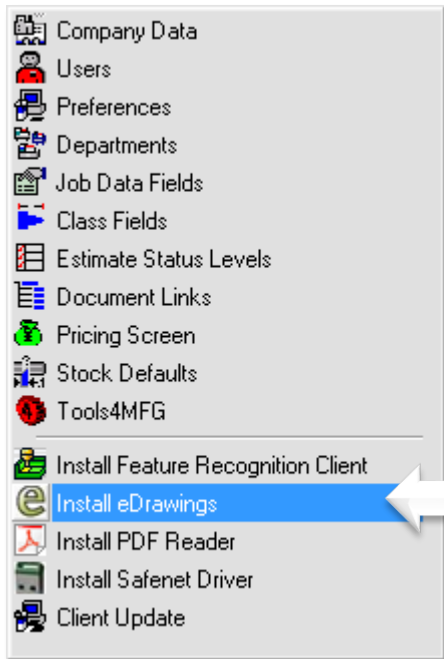
RFQ Manager



Using Email RFQ's, you can design multiple email templates as you wish. You can optionally attach a traditional Form Template merge form if you wish. You may specify various options for whom to reply to with questions, and whom to submit the final quote to. You are allowed to attach files to the email such as drawings or spec sheets. In addition to selecting vendors individually, you can now pre-define Contact Group distribution lists, such as steel vendors, brass vendors, heat treaters, etc. Selecting the group will auto-fill the contact list for who will receive the RFQ's. Each RFQ is individually formatted, addressed, and sent to your vendor rather than a generic CC'ed email. The Attach E-Docs feature will include a computer-readable XML file containing detailed data needed to quote the part. When you Email the RFQ, a record for each RFQ will be created to track the status and results of the RFQ.

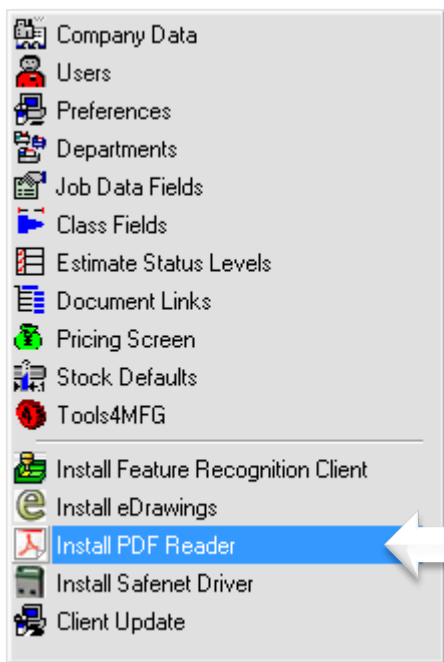
The new Analyze feature will display the results of the received RFQ's helping you to choose which vendor to select.

eDrawings



ME now supports the SolidWorks eDrawings viewer to view SolidWorks models in our integrated file viewer. To install the viewer, from the Control Panel menu, select **Setup, Install eDrawings**. You will be taken to the SolidWorks web site to download and install the eDrawings viewer.

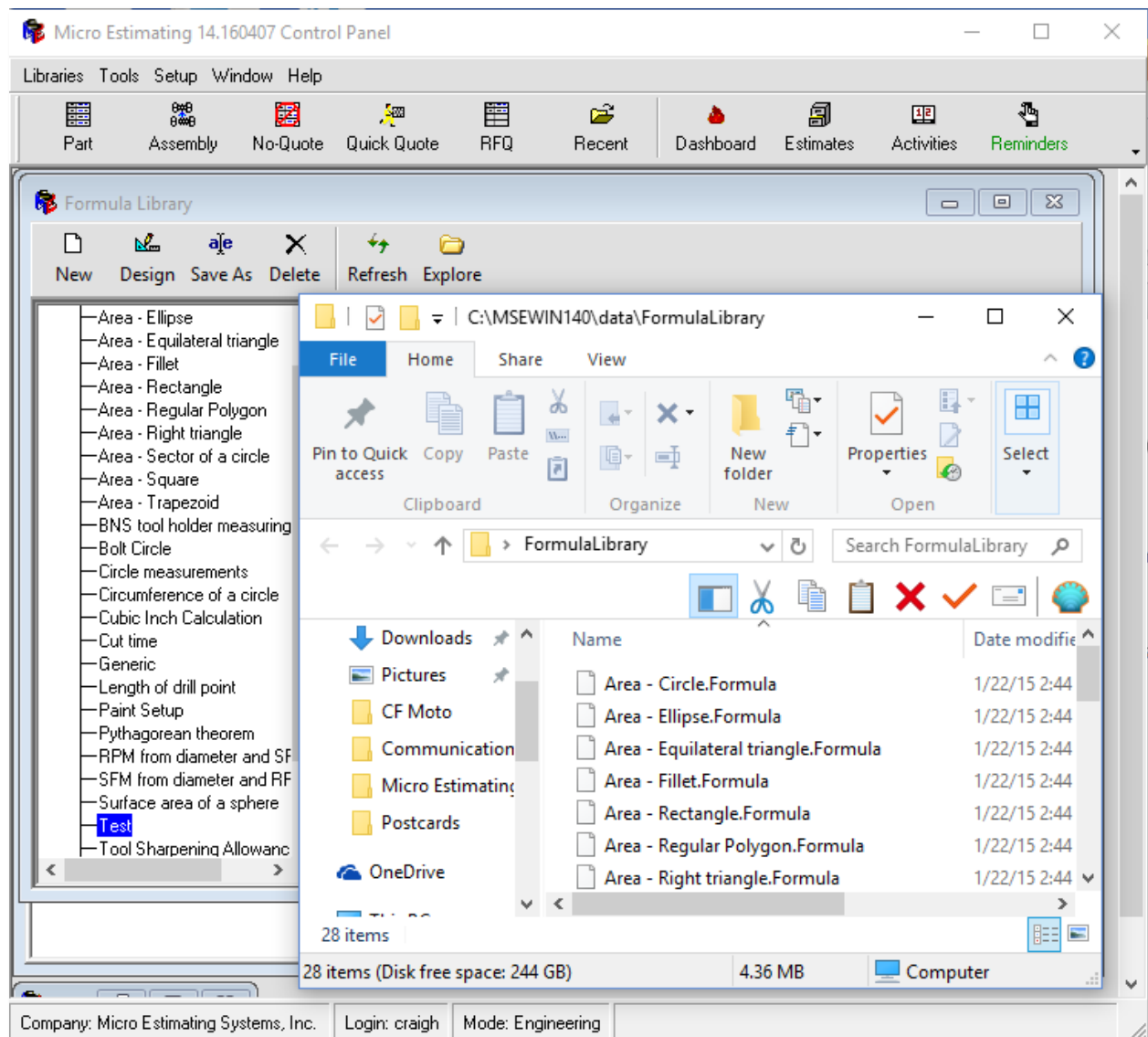
PDF Reader



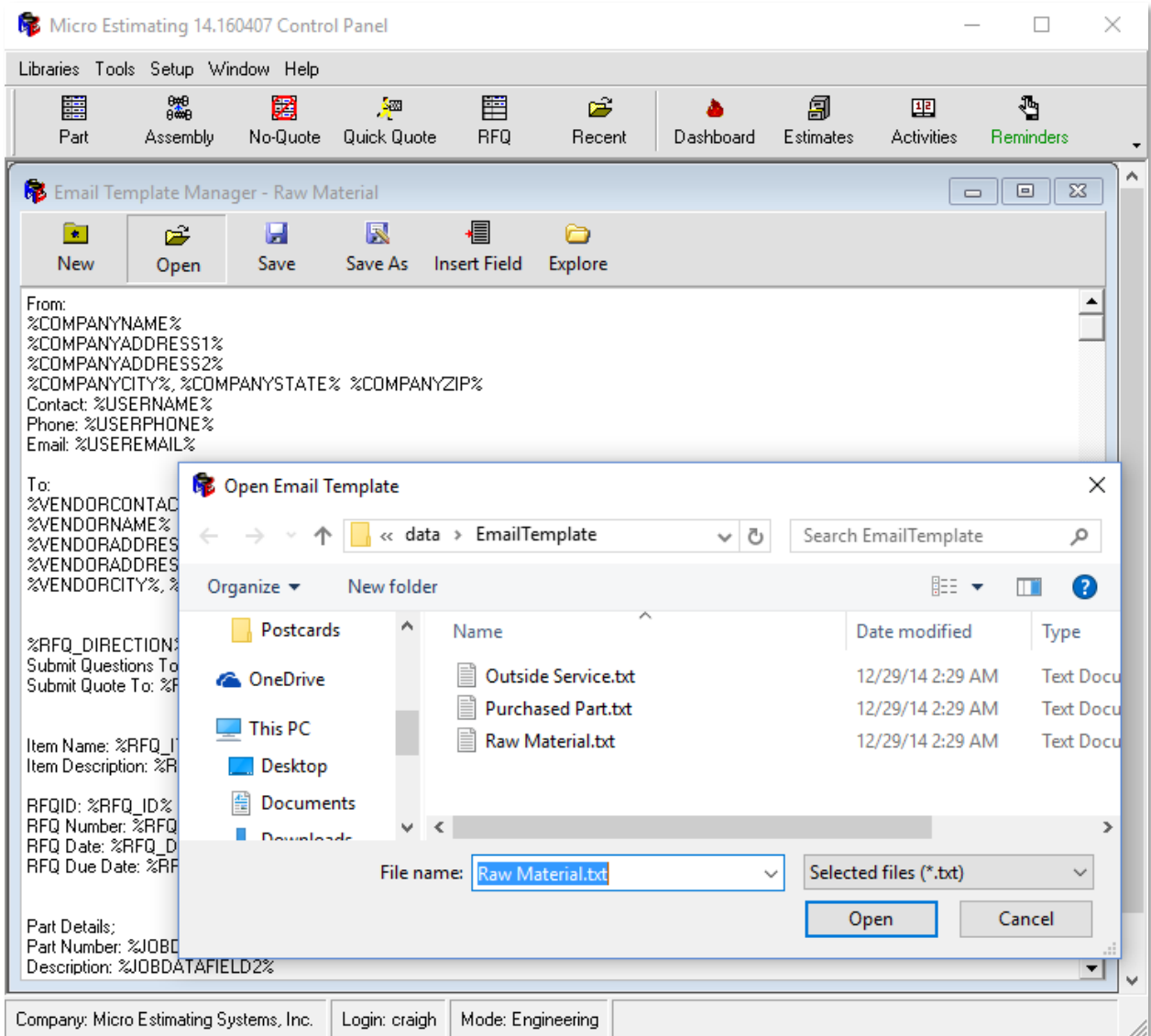
Micro Estimating Version 14 now supports the PDF Reader to view PDF documents in our integrated file viewer. To install the viewer, from the Control Panel menu, select **Setup, Install PDF Reader**. You will be taken to the Adobe web site to download and install the viewer.

Explore Tools

Many utilities have an added Explore tool to allow managing files, including copy, paste, and rename, as well as copying files to other ME companies.

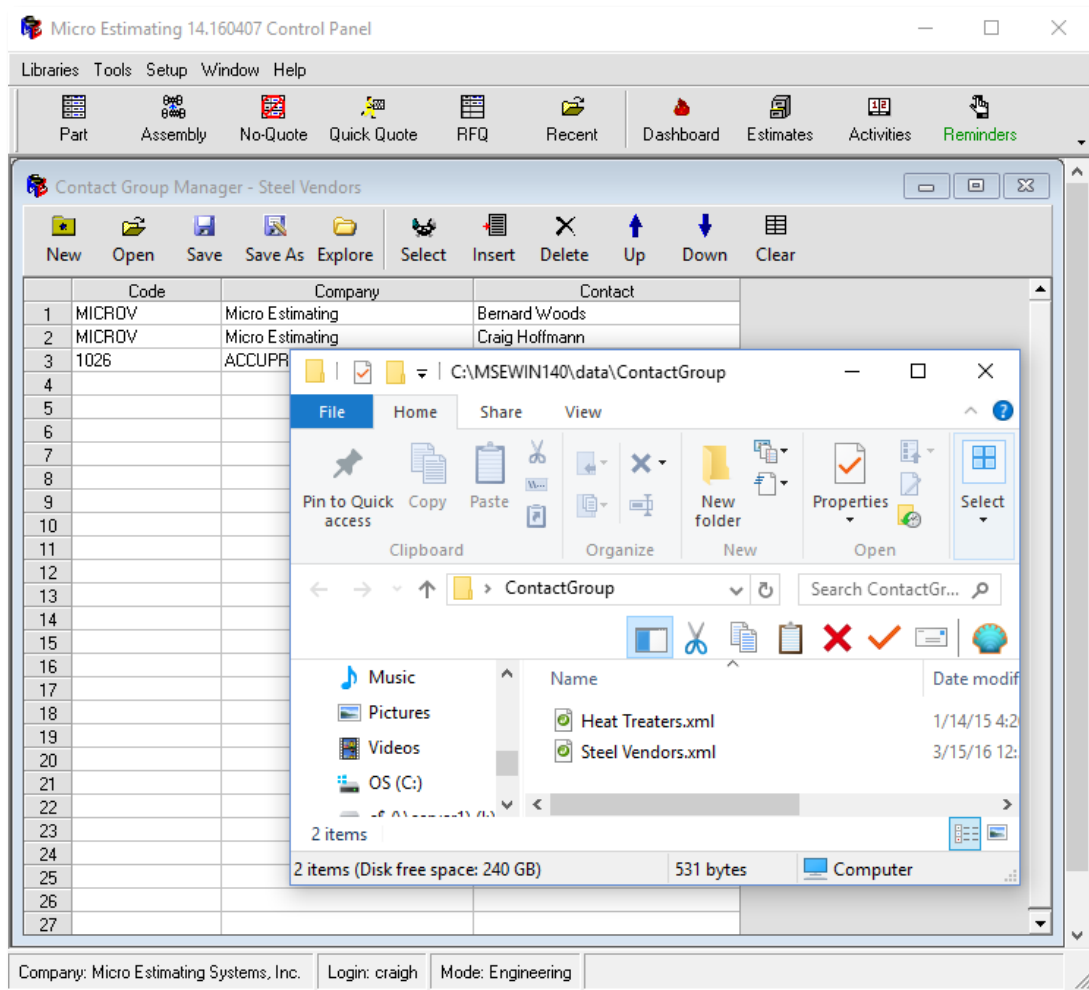


Email Template Manager



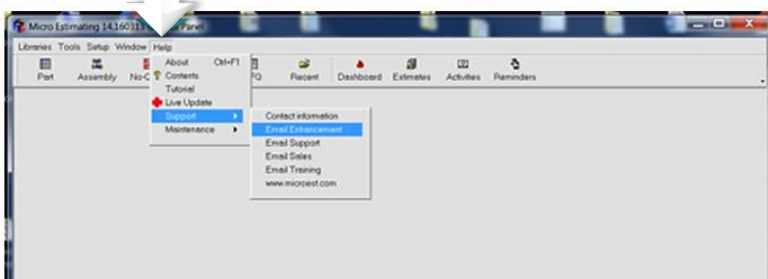
The Email Template Manager allows you to define email templates for use in the RFQ Manager complete with data merge fields.

Contact Group Manager



The Contact Group Manager allows you to create distribution groups for use with the RFQ Manager. You can create groups such as Steel Vendors, Heat Treaters, etc. to allow you to send individualized RFQ emails to multiple vendors with **one click**!

Suggestion and Ideas!



As always, we would love to hear from you. If you have any ideas or suggestions you would like to see integrated into the next release, we encourage you to email your ideas by using the **Enhancement Request** option under the **Help** menu.

If you have questions or need assistance,
Technical Support is available
9:00 AM - 5:00 PM EST.
Please call 262.860.0560 option #2,
or email: support@microest.com

