

Global Edge® Engineering Assistant



Global Edge® Engineering Assistant **Demonstration Guide**

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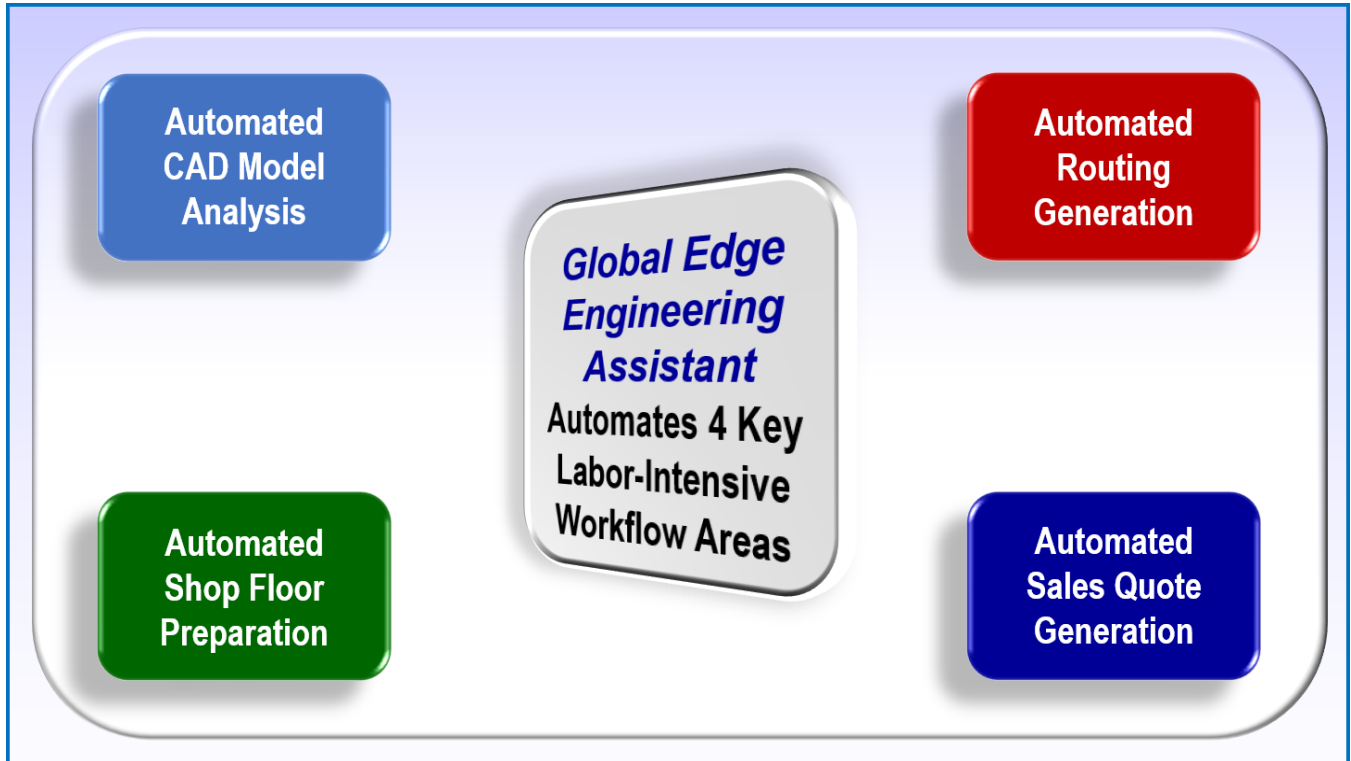
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Demo Section 0: Overview

Global Edge® Engineering Assistant starts with the capability of automatically processing 3D CAD Models to produce 2D DXF Flat Files included with Extended Data to drive Automated Bend Program Generation, Automated Routing Generation, and Automated Sales Quote Generation.



Demonstration Outline

The following outlines the steps that illustrate the capabilities of the **Global Edge® Engineering Assistant**:

Demo Section 1: Automated CAD Model Analysis

- 1.1 – Automated DXF Flat File Generation
- 1.2 – Automated DXF Flat File Importation
- 1.3 – DXF Part Parameter Confirmation
- 1.4 – Automated Routing Generation / Cost Rollups
- 1.5 – Generate Part Parameter Report

Demo Section 2: Automated Sales Quote Generation

- 2.1 – Customer Selection / Generate Quote Header
- 2.2 – Sales Quote Item Configuration / Cost Rollups
- 2.3 – Generate PDF Sales Quote

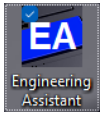
Demo Section 1: Automated CAD Model Analysis

Global Edge® Engineering Assistant provides automated CAD model analysis to automatically analyze CAD part parameters and store these parameters in an SQL database. These CAD part parameters can then be utilized to automatically generate optimal routings including time and material cost rollups. Additionally, these CAD part parameters can be incorporated into DXF flat files to facilitate automated bend program generation for both press brakes and panel benders.

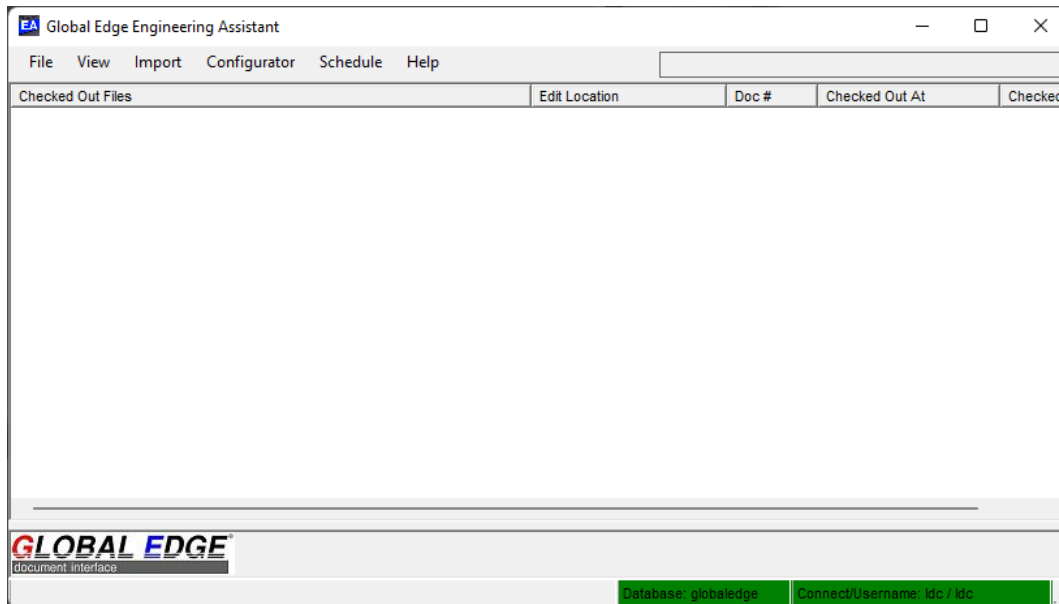
1.1 – Automated DXF Flat File Generation

Workflow Steps

1. The first step is to open the **Global Edge® Engineering Assistant** software by clicking on the following desktop icon:

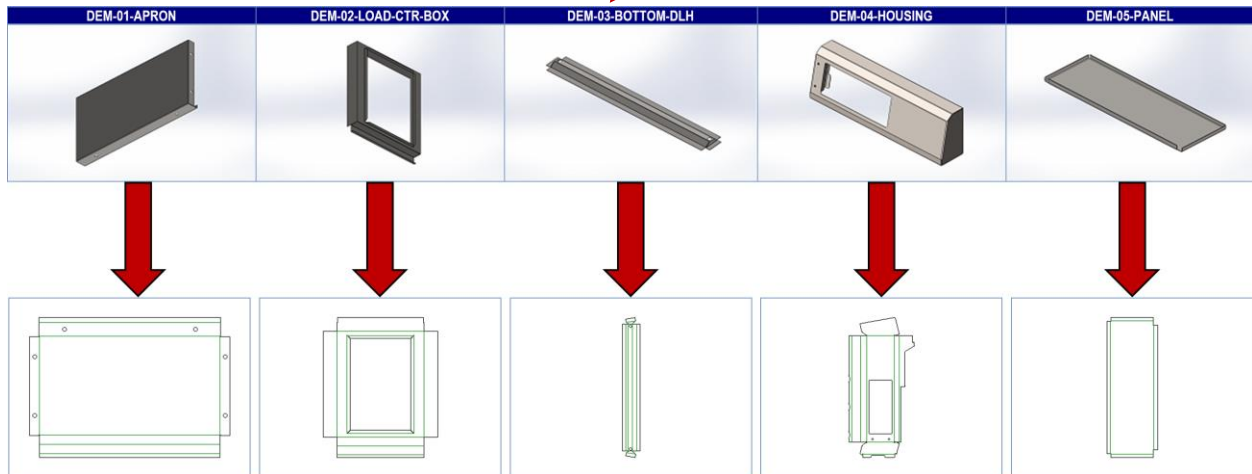


2. This will display the following screen form and menu options:



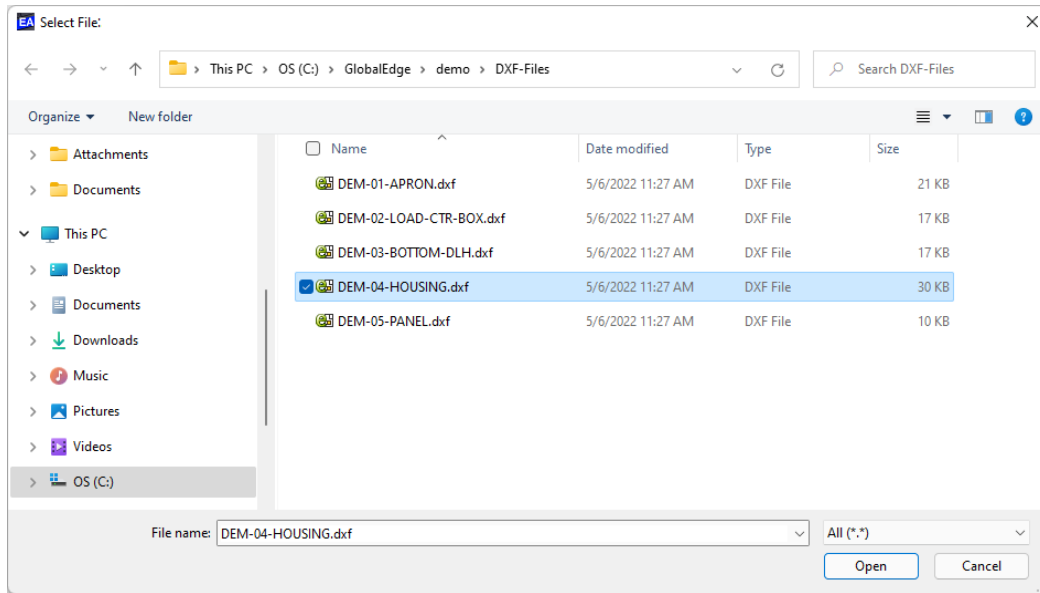
3. Select **“Import > Import CAD Files”** option to display Import CAD Files screen. Select **“Create DXF(s)”** option to automatically generate 2D DXF Flat Files from 3D SolidWorks CAD Models. This process includes automatically embedding Extended Data into the 2D DXF Flat Files to drive Automated Bend Program Generation, Automated Routing Generation, and Automated Sales Quote Generation:

The screenshot shows the 'Import CAD Files' dialog box with various input fields for customer, quote, and part information. The 'PART CATEGORY AND STYLE' section includes dropdowns for Main Assembly, Sub-Assembly, Sheet Metal, and Parts. The 'DXF Import Rules' are set to 'SolidWorks Format'. The 'SHEET METAL PART PROPERTIES' section contains numerous fields for dimensions, tolerances, and bend settings. The 'Scaling' section has options for 'Imported' and 'Scaled' with input fields for Flat Length, Flat Width, and Adjusted Scale. The 'Line Key' section defines colors for Up Bend, Down Bend, Emboss, and Etch. The 'OPTIONS' section includes checkboxes for Auto-Configure, Build Routing, Prompt Data, Auto Queue, Write Log File, Detailed Log, and Debug. The 'PART UPDATE' section includes checkboxes for Pending, Active, Under Revision, In-Active, Obsolete, and Temporary. A red arrow points from the 'Create DXF(s)' button to the first 3D model in the sequence below.

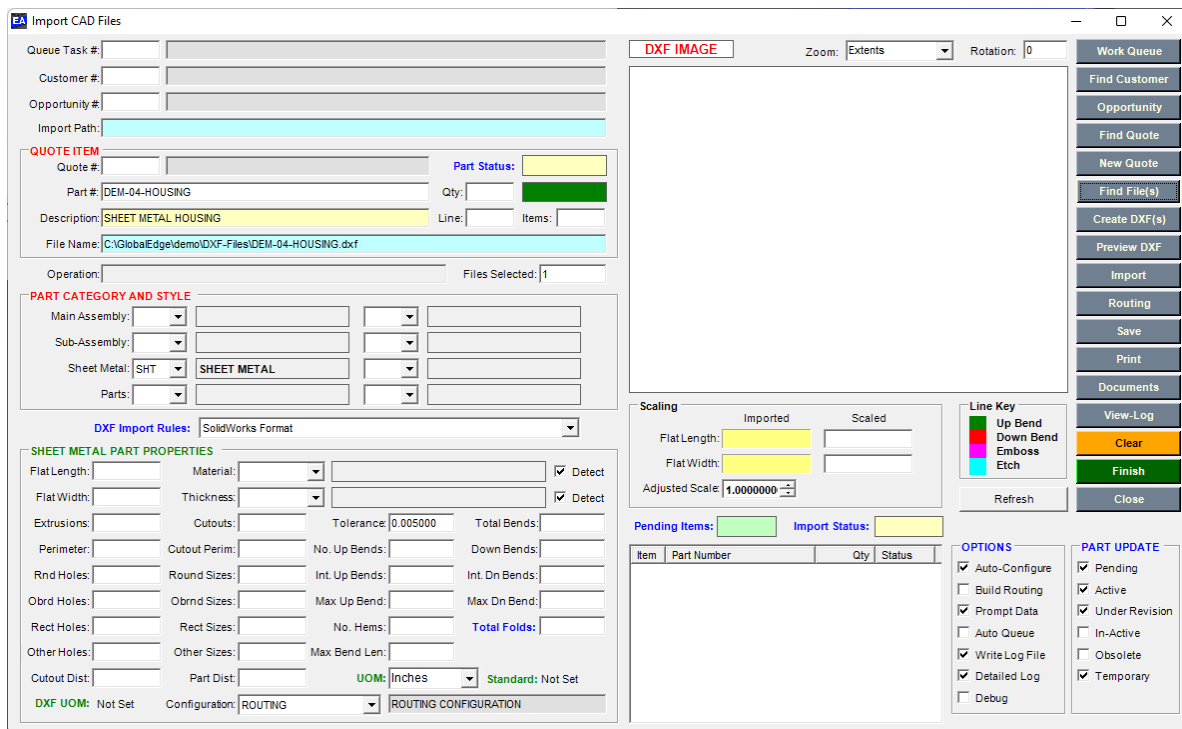


1.2 – Automated DXF Flat File Importation

4. Select **“Find File(s)”** option and select the DXF file(s) to process with the Select File screen:



5. This displays the selected DXF file on the Import CAD Files screen:



6. The next step is to select the option to have the software automatically generate routings for the selected part:

The screenshot shows the 'Import CAD Files' dialog box with various fields for customer information, part details, and routing configuration. The 'Build Routing' checkbox is highlighted with a red box and a callout bubble.

Import CAD Files

Queue Task #: Customer #: Opportunity #: Import Path:

QUOTE ITEM

Quote #: Part Status: Part #: DEM-04-HOUSING Qty: Description: SHEET METAL HOUSING Line: Items: File Name: C:\GlobalEdge\demo\DXF-Files\DEM-04-HOUSING.dxf

Operation: Files Selected: 1

PART CATEGORY AND STYLE

Main Assembly: Sub-Assembly: Sheet Metal: SHT SHEET METAL Parts:

DXF Import Rules: SolidWorks Format

SHEET METAL PART PROPERTIES

Flat Length: Material: ☒ Detect Flat Width: Thickness: ☒ Detect Extrusions: Cutouts: Tolerance: 0.005000 Total Bends: Perimeter: Cutout Perim: No. Up Bends: Down Bends: Rnd Holes: Round Sizes: Int. Up Bends: Int. Dn Bends: Obrd Holes: Obrnd Sizes: Max Up Bend: Max Dn Bend: Rect Holes: Rect Sizes: No. Hems: Total Folds: Other Holes: Other Sizes: Max Bend Len: Cutout Dist: Part Dist: UOM: Inches Standard: Not Set

DXF UOM: Not Set Configuration: ROUTING ROUTING CONFIGURATION

Scaling

Imported Scaled Flat Length: Flat Width: Adjusted Scale: 1.0000000

Line Key

Up Bend Down Bend Emboss Etch

Pending Items: **Import Status:**

Item **Part Number** **Qty** **Status**

OPTIONS

☒ Auto-Configure ☒ Build Routing ☒ Prompt Data ☐ Auto Queue ☒ Write Log File ☒ Detailed Log ☐ Debug

PART UPDATE

☒ Pending ☒ Active ☒ Under Revision ☐ In-Active ☐ Obsolete ☒ Temporary

The **Global Edge Engineering Assistant** provides the capability to define routing configuration rules that can generate routings based on imported CAD part parameters. These routing rules provides the ability to automatically calculate laser cut times based on material, thickness and specific laser capabilities that include:

- Laser Cut Speed
- Perimeter Cut Speed
- Cutout Cut Speed
- Piercing Time
- Load / Unload Time

This also includes machine time for punching, bending, welding, painting, assembly, and other related machine times that can be utilized for things like quoting, cost estimating and scheduling.

Select the **"Build Routing"** check box to have the software automatically generate routings with the ROUTING CONFIGURATION selected in the lower portion of the screen.

1.3 – DXF Part Parameter Confirmation

7. Select **“Import”** option which will display the Part Master Update screen:

Part Master Update

Part Number: DEM-04-HOUSING
SHEET METAL HOUSING

Customer #:
Cust Part #:

Material Properties
Material: 304-4 304-4 STAINLESS STEEL
Thickness: 14 GA. 0.075
Certified: No UOM: Inches
Default Sheet:
Sheet Length: 0 Width: 0
Blank Length: 0 Width: 0
Pieces per Sheet:

Cutting Process
Cutting Method: Open
Asset #: Laser
Config: ROUTING Open

Standard Bend Process
Process #:
Radius:
Model IR:
Status:

Category/Style
Category: SHT SHEET METAL
Style:

Process M: Active ☒ Auto-Configure

Scaling
Imported Scaled
Flat Length: 19.699142 19.699142
Flat Width: 42.193245 42.193245
Adjusted Scale: 1.00000000

Editable Part Parameters
UOM inches
Extrusions: 0 Down Bends: 8
No. Up Bends: 0 Int. Dn Bends: 0
Int. Up Bends: 0 Max Dn Bend: 0
Max Up Bend: 0 Hem Count:
Total Bends: 8 Total Folds: 0
Min. Length: 0 Max Bend Length: 0
Min. Angle: 10 Max Bend Angle: 93
Min. Flange: 0 Max Flange: 0
Min. P.E. Min Dn PEM Gap: 0
Min Emboss Min Dn Emboss: 0
Min Louver G Min Dn Louver: 0
Min Taper Gap Min Die Cutout: 0
Bend Direction:

Processes
☐ Blank
☐ Emboss
☐ Turret
☐ Laser
☐ Press Brake
☐ Panel Bender
☐ Pem Nut
☐ Pem Stud
☐ Grain
☐ Weld
☐ Deburr
☐ Paint

The **Global Edge Engineering Assistant** provides the ability to define routing rules that are executed by the built-in routing configurator. This includes the automated generation of cutting times. The choices in the drop-down include:

- Laser
- Turret
- Open

When selecting the **“Open”** option, the routing configurator will determine the optimal method to cut part based on cost and/or delivery time.

The **“Material Properties”** that are comprised of Material and Thickness are automatically displayed if they are defined in the original CAD model. If they are not defined, the user can select the proper material and thickness that will then subsequently be added to the DXF flat file as extended data.

Part Master Update

Part Number: DEM-04-HOUSING
SHEET METAL HOUSING

Customer #:
Cust Part #:

Material Properties
Material: 304-4 304-4 STAINLESS STEEL
Thickness: 14 GA. 0.075
Certified: No UOM: Inches
Default Sheet:
Sheet Length: 0 Width: 0
Blank Length: 0 Width: 0
Pieces per Sheet:

Cutting Process
Cutting Method: Laser
Asset #:
Config: ROUTING ROUTING CONFIGURATION

Standard Bend Process
Process #:
Radius: UOM:
Model IR:

Category/Style
Category: SHT SHEET METAL
Style:

Scaling
Imported Scaled
Flat Length: 19.699142 19.699142
Flat Width: 42.193245 42.193245
Adjusted Scale: 1.00000000

Editable Part Parameters
UOM: inches
Extrusions: 0 Down Bends: 8
No. Up Bends: 0 Int. Dn Bends: 0
Int. Up Bends: 0 Max Dn Bend: 0
Max Up Bend: 0 Hem Count:
Total Bends: 8 Total Folds: 0
Min Bend Length: 0 Max Bend Length: 0
Min Bend Angle: 10 Max Bend Angle: 93
Min Flange: 0 Max Flange: 0
Min PEM Gap: 0 Min Dn PEM Gap: 0
Min Emboss Gap: 0 Min Dn Emboss: 0
Min Louver Gap: 0 Min Dn Louver: 0
Min Taper Gap: 0 Min Die Cutout: 0
Bend Direction: As Drawn
Flip Bends

Processes
☐ Blank
☐ Emboss
☐ Turret
☒ Laser
☐ Press Brake
☐ Panel Bender
☐ Pem Nut
☐ Pem Stud
☐ Grain
☐ Weld
☐ Deburr
☐ Paint

Status:

The **Global Edge Engineering Assistant** provides the ability to define routing rules that are executed by the built-in routing configurator. This includes the automated generation of cutting times. The choices in the drop-down include:

- Laser
- Turret
- Open

When selecting the **“Open”** option, the routing configurator will determine the optimal method to cut part based on cost and/or delivery time.

The **“Editable Part Parameters”** section provides a list of 24 CAD part parameters. These 24 CAD part parameters can optionally be changed by the user need be. The software also analyzes an additional 24 CAD part parameters for a total of 48 CAD part parameters.

This section includes a **“Flip Bends”** option that allows the user to flip Up Bends to Down Bends or vice versa. This is to correct the bend direction from the original CAD model if it does not match the proper machine tool bend direction.

Part Master Update

Part Number: DEM-04-HOUSING
 SHEET METAL HOUSING

Customer #:
 Cust Part #:

Material Properties
 Material: 304-4 304-4 STAINLESS STEEL
 Thickness: 14 GA. 0.075
 Certified: No UOM: Inches
 Default Sheet:
 Sheet Length: 0 Width: 0
 Blank Length: 0 Width: 0
 Pieces per Sheet:

Cutting Process
 Cutting Method: Laser
 Asset #:
 Config: ROUTING ROUTING CONFIGURATION

Standard Bend Process
 Process #:
 Radius: UOM:
 Model IR:
 Status:

Category/Style
 Category: SHT SHEET METAL
 Style:
 Process M: Active Auto-Configure

Scaling
 Imported Scaled
 Flat Length: 19.699142 19.699142
 Flat Width: 42.193245 42.193245
 Adjusted Scale: 1.00000000

Editable Part Parameters
 UOM: inches
 Extrusions: 0 Down Bends: 8
 No. Up Bends: 0 Int. Dn Bends: 0
 Int. Up Bends: 0 Max Dn Bend: 0
 Max Up Bend: 0 Hem Count:
 Total Bends: 8 Total Folds: 0
 Min Bend Length: 0 Max Bend Length: 0
 Min Bend Angle: 10 Max Bend Angle: 93
 Min Flange: 0 Max Flange: 0
 Min PEM Gap: 0 Min Dn PEM Gap: 0
 Min Emboss Gap: 0 Min Dn Emboss: 0
 Min Louver Gap: 0 Min Dn Louver: 0
 Min Taper Gap: 0 Min Die Cutout: 0
 Bend Direction: As Drawn
 Flip Bends

Processes
☐ Blank
☐ Emboss
☐ Turret
☒ Laser
☒ Press Brake
☐ Panel Bender
☐ Pem Nut
☐ Pem Stud
☐ Grain
☒ Weld
☒ Deburr
☒ Paint

The **Global Edge Engineering Assistant** will automatically add extended data to the DXF file with the information contained on the above screen. The software additionally includes a total of 48 CAD part parameters that can be added to the DXF file and routing steps that are outlined on the next screen. Refer to Page ## for a list of information that can be added as extended data to the DXF file.

This column of check boxes allows you to select routing steps to be executed on the selected part. This includes the following manufacturing processes to execute:

- Blank
- Emboss
- Turret
- Laser
- Press Brake
- Panel Bender
- Pem Nut / Stud
- Grain
- Weld
- Deburr
- Paint

The software will generate routings including time calculations for accurate machine process times.

1.4 – Automated Routing Generation / Cost Rollups

8. After selecting “OK” option, and if “**Routing Check Box**” was checked, the following Part Routing screen is displayed with the generated manufacturing steps:

These columns calculate / display the cost estimate to fabricate a single part. The software can also calculate the cost for various levels of production.

The screenshot shows the 'Part Routing' window for part 'DEM-04-HOUSING' (SHEET METAL HOUSING). The 'Route' section shows Route # 1, Description: STANDARD PART ROUTING, Type: Standard, Optimization: None, Loca. Level: None, Optimization Quantity: 1, and Operation: 14 Operations Found ... The 'Cost' section shows Set Up: \$142.50, Component: \$43.63, Process: \$24.77, and Total Cost: \$210.91. The 'Standard Bend Process' section shows Process #: , Radius: , and UOM: . The table below lists 14 manufacturing steps with their descriptions, types, units per hour, estimated costs, machine numbers, and machine references.

Seq #	Routing	Routing Description	Type	Units / Hour	Estimated Cost	Mach #	Mach Ref
1	LASER-CUT	Laser Cut Operation	Process	200.00	15.0000	1003	LASER-1003
2	BEND	Press Brake Bending Operation	Process	100.00	0.7500	1007	PB-1007
3	TIG-WELD	TIG Weld	Process	6.67	6.7500	1010	WELD-1010
4	DEBURR	Deburring Operation	Process	14.53	3.0971	1011	FINISH-1011
5	SAND-PAINT-PREP	Sand / Paint / Preparation Operation	Process	62.36	0.6414	1018	PAINT-1018
6	HANGING	Hanging Operation	Process	50.00	0.5000	1015	HANG-1015
7	WASHING	Washing Operation	Process	100.00	0.2500	1016	WASH-1016
8	PAINTING	Painting Operation	Process	31.18	1.2828	1017	PAINT-1017
9	CURING	Curing Operation	Process	20.00	1.2500	1019	OVEN-1019
10	ASSEMBLY	Assembly Operation	Process	20.00	2.5000	1021	ASSM-1021
11	GENERAL-LABOR	General Labor Operation	Process	20.00	2.5000	1025	LABOR-1025
12	FINAL-INSPECT	Final Inspection Operation	Process	20.00	1.7500	1026	INSPECT-1026
13	PACKAGE	Package Operation	Process	20.00	1.7500	1027	PACK-1027
14	SHIPPING	Shipping Operation	Process	20.00	1.7500	1028	SHIP-1028

These columns (Units / Hour, Estimated Cost, Mach #) are automatically generated with the configuration engine which includes how many units can be produced per hour and the estimated cost per unit based on the machine tool selected for each specific process.

The **Global Edge Engineering Assistant** includes a configuration engine that runs in the background to generate routings based on the CAD part parameters and simple to define routing rules.

These columns (Units / Hour, Estimated Cost, Mach #) are automatically generated with the configuration engine which includes how many units can be produced per hour and the estimated cost per unit based on the machine tool selected for each specific process.

1.5 – Generate Part Parameter Report

9. After selecting “OK” option, the following screen form is displayed upon completion of Import CAD Files process:

The **Global Edge Engineering Assistant** provides the ability to automatically analyze CAD part parameters. This includes a total of 48 CAD part parameters to drive:

- Automated Bend Program Generation
- Automated Routing Generation
- Manufacturability Testing
- Automated Sales Quote Generation

Refer to Page 13 for a listing of the information that is analyzed and generated with the CAD part importation process.

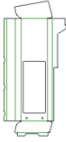
10. Select the “Print” option to generate Part DXF Import Report:

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CAD Part Parameter Report (Part 1 of 3)

The first portion of the **CAD Part Parameter Report** includes the following 48 CAD part parameters that are analyzed and recorded in an SQL database. These CAD part parameters provide the foundation for the automated generation of bend programs for press brakes, panel benders and other robotic folders. This is accomplished with the **Global Edge Engineering Assistant** software comparing the CAD part parameters with your available machine tool tooling such as part size, bend angles, hem counts, pem and louver gaps from bend lines, etc.:

Part Number	Description	UOM	Type	Cat.	Style	Mtl.
DEM-04-HOUSING	SHEET METAL HOUSING	EA	C	SHT	-	304-4
Setup Cost:	142.5000	Material: 304-4-STAINLESS STEEL				
Process Cost:	24.7713	Ship Weight: 17.4537				
Component Cost:	43.6343	Ship Weight UOM: lbs				
Rollup Cost:	210.9056	Standard Cost: 210.9056				



CAD Part Parameters							
Par. #	Parameter Name	Value	UOM	Par. #	Parameter Name	Value	UOM
1	Sheet Length:	0.000000	inches	25	Minimum Pem Gap:	0.000000	inches
2	Sheet Width:	0.000000	inches	26	Minimum Down Pem Gap:	0.000000	inches
3	Blank Length:	0.000000	inches	27	Minimum Emboss Gap:	0.000000	inches
4	Blank Width:	0.000000	inches	28	Minimum Down Emboss Gap:	0.000000	inches
5	Material thickness:	0.075000	inches	29	Minimum Louver Gap:	0.000000	inches
6	Perimeter:	133.048128	inches	30	Minimum Down Louver Gap:	0.000000	inches
7	Flat Length:	19.699142	inches	31	Min. Taper Bend Line Gap:	0.000000	inches
8	Flat Width:	42.193245	inches	32	Minimum Die Cutout:	0.000000	inches
9	Round Holes:	2.000000	-	33	Up Bends:	8.000000	-
10	Round Sizes:	1.000000	-	34	Internal Up Bends:	0.000000	-
11	Oround Holes:	0.000000	-	35	Maximum Up Bend:	5.296000	-
12	Oround Sizes:	0.000000	-	36	Down Bends:	0.000000	-
13	Rectangular Holes:	0.000000	-	37	Internal Down Bends:	0.000000	-
14	Rectangular Sizes:	0.000000	-	38	Maximum Down Bend:	0.000000	-
15	Other Holes:	1.000000	-	39	Fold Count:	8.000000	-
16	Other Sizes:	1.000000	-	40	Hem Count:	0.000000	-
17	Number of Cutouts:	3.000000	-	41	Extrude Count:	0.000000	-
18	Cutout Perimeter:	48.355855	inches	42	Bend Radius:	0.120000	inches
19	Minimum Bend Length:	8.451000	inches	43	Cutting Method:	Laser	-
20	Maximum Bend Length:	32.210000	inches	44	Cutter Ref. Number:	-	-
21	Minimum Bend Angle:	37.000000	degrees	45	Certified Material:	No	-
22	Maximum Bend Angle:	93.000000	degrees	46	Material:	304-4	-
23	Minimum Flange Width:	0.927000	inches	47	Cutout Distance:	18.055118	inches
24	Maximum Flange Width:	5.296000	inches	48	Part Distance:	30.946193	inches

CAD Part Parameter Report (Part 2 of 3)

The second portion of the **CAD Part Parameter Report** includes a list of the routing steps generated by the Routing Configurator built into the **Global Edge Engineering Assistant**. These routing steps are based on user defined routing rules that utilize the CAD part parameters to generate accurate process times based on part size, material and thickness including an accurate rollout of costs:

Part Routing								
Trans #	Seq. #	Process	Description	UOM	Setup Time	Setup Cost	Process Time	Std. Proc. Cost
986	1	LASER-CUT	Laser Cut Operation	hours	0.010000	1.50	0.100000	15.0000
987	2	BEND	Press Brake Bending Operation	hours	0.500000	37.50	0.010000	0.7500
988	3	TIG-WELD	TIG Weld	hours	0.500000	22.50	0.150000	6.7500
989	4	DEBURR	Deburring Operation	hours	0.200000	9.00	0.068824	3.0971
990	5	SAND-PAINT-PREP	Sand / Paint / Preparation Operation	hours	0.150000	6.00	0.016035	0.6414
991	6	HANGING	Hanging Operation	hours	0.150000	3.75	0.020000	0.5000
992	7	WASHING	Washing Operation	hours	0.150000	3.75	0.010000	0.2500
993	8	PAINTING	Painting Operation	hours	0.150000	6.00	0.032069	1.2828
994	9	CURING	Curing Operation	hours	0.250000	6.25	0.050000	1.2500
995	10	ASSEMBLY	Assembly Operation	hours	0.250000	12.50	0.050000	2.5000
996	11	GENERAL-LABOR	General Labor Operation	hours	0.250000	12.50	0.050000	2.5000
997	12	FINAL-INSPECT	Final Inspection Operation	hours	0.250000	8.75	0.050000	1.7500
998	13	PACKAGE	Package Operation	hours	0.250000	8.75	0.050000	1.7500
999	14	SHIPPING	Shipping Operation	hours	0.150000	5.25	0.050000	1.7500
					3.210000	\$144.00	0.706928	\$39.7713

CAD Part Parameter Report (Part 3 of 3)

The third portion of the **CAD Part Parameter Report** includes Manufacturability Test Results. These test results are the result of comparing CAD part parameters with user defined bend processes which provides the allowable limits of your tooling sets. The left-hand portion of the report includes the bend process limits while the right-hand portion includes the CAD part parameters:

Manufacturability Test Results										
Process #:		4	Bnd Proc., SS 304-4, 0.075, Rad - 0.120			DEM-04-HOUSING		SHEET METAL HOUSING		
Mtl. Code:		304-4		Pass		46	Material:		304-4 -	
Thickness:		0.075000	Pass		Linear UOM:	inches	5	Material thickness:		0.075000 inches
Min. Thickness:		0.072000	Max. Thickness:		0.077000					
Upper Tool Set:		2	Upper Part #:		BIU-817					
Lower Tool Set:		7	Lower Part #:		OZU-318					
Inside 90 Radius:		0.120000	Pass		Radius Tol:	0.010000				
K Factor 90:		0.445000	Bend Allowance 90:		0.008000		42	Bend Radius:		0.120000 inches
Gage Allowance 90:		0.003000	Tons Per Foot:		25.000000					
Min. Flat Length:		4.000000	Pass		Max. Flat Len:	72.000000	7	Flat Length:		19.699142 inches
Min. Flat Width:		2.000000	Pass		Max. Fl. Width:	48.000000	8	Flat Width:		42.193245 inches
Max. Bend Len:		72.000000	-		Max. Tonnage:	150.000000				
Max. Part Weight:		125.000000	-		Mass UOM:	lbs				
Min. Angle:		39.000000	Fail							
Max. Angle:		180.000000	Pass				21	Minimum Bend Angle:		37.000000 degrees
Min Length:		0.750000	Pass				22	Maximum Bend Angle:		93.000000 degrees
Max Length:		96.000000	Pass				19	Minimum Bend Length:		8.451000 inches
Min. Flange Width:		1.200000	Pass				20	Maximum Bend Length:		32.210000 inches
Max. Flange Width:		24.000000	Pass				23	Minimum Flange Width:		0.927000 inches
							24	Maximum Flange Width:		5.296000 inches

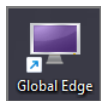
Demo Section 2: Automated Sales Quote Generation

Global Edge® Engineering Assistant includes Automated Sales Quote Generation by incorporating the CAD part importation capabilities into the quoting process. Within the previous section of the software, the user can look up a customer, generate a sales quote header and attach imported CAD parts to the sales quote. Once CAD part parameters are imported and stored in the SQL database, this section of the **Global Edge® Engineering Assistant** software provides the capabilities of a full functioned quoting system.

2.1 – Customer Selection / Generate Sales Quote Header

Workflow Steps

1. The first step is to open the **Global Edge® Engineering Assistant** software by clicking on the following desktop icon:



2. This will display the following splash screen and menu options:



3. Select **“CRM-Quoting > Prospect / Quote Management”** followed by selecting **“Find > Profile > OK”** to display the following customer record:

PROSPECT QUOTE: Global Edge Windows Demo Server

Prospect-Maintenance

ID #: 1001 REF #: ABC-MFG PHONE: 414-555-1100 EXT: 101
 COMPANY: ABC MANUFACTURING MOBILE: 414-555-3562
 CONTACT: Robert Smith, V.P. of Engineering FAX: 414-555-1105
 E-MAIL: rsmith@abc-manufacturing.com LET: Bob
 ALT. CONTACT: Julie Smith, Accounting Manager ATH: MFD MAKES FINAL DECSN
 ADDRESS 1: 5000 West Industrial Way REP: RDS Robert D. Smith
 ADDRESS 2: TER: US1 USA - CENTRAL
 CITY/STATE/ZIP: Milwaukee WI 55555 CUS: MFR MANUFACTURER
 COUNTRY: United States of America >>> TICKLER DATE: 04/01/2022

ACTION: CLL CALL Setup Demonstration of Global Edge Engineering Assistant

PRODUCT INTEREST: CAB CABINET Fabricated Sheet Metal

LEAD SOURCE: TRS TRADE SHOW

TYPE: C MEET REQ.-INTEREST

POTENTIAL: \$5000.00 PRICE LIST: [Green Bar]

SALES STAGE: 4 Quoting Stage INITIAL CONTACT: 04/01/2022
 WEBSITE: www.abc-manufacturing.com LAST CONTACT: 04/01/2022
 NAICS CODE: EMPLOYEE COUNT: 140
 SIC CODE: ANNUAL REVENUE: 15 to 20 million

PRODUCTS: Fabricated Sheet Metal

NOTES: Sheet Metal Products

DATE ADDED: DATE MODIFIED:

PR01

Find Existing Prospect(s)

PROSPECT

Add

Find

Next

Previous

Goto

Tickler

Update

Contact

Edit-Notes

Opportunity

Sales-Quote

More

Delete

Work Queue

QUIT

4. Select **“Sales-Quote”** to display the following screen form and menu options:

PROSPECT QUOTE: Global Edge Windows Demo Server

Sales-Quotes

CUST #: 1001 REF #: ABC-MFG ABC MANUFACTURING

QUOTE #	DATE	NOTE	STATUS	TOTAL	TASKS
1001	09/01/2022	Fabricated Sheet Metal Parts	ENTERED	\$28429.43	0

OPEN TASKS: 0

PR07

Add New Sales Quote

QUOTE

Add

Update

View

Print

Letter

Copy

Delete

Notes

QUIT

5. Select **"Update"** and select **QUOTE #: 1001** followed by **"OK"** to display the following screen form and menu options:

PROSPECT QUOTE: Global Edge Windows Demo Server

Quote-Header

Quote Header Information

CUST #:	1001	REF #:	ABC MANUFACTURING
QUOTE #:	1001	QUOTE REF #:	
REVISION #:		STATUS:	Entered
NOTE:	Fabricated Sheet Metal Parts		
LOCATION #:	1	CORP. HEADQUARTERS / MANUFACTURING	ENG. APPROVAL:
CONTACT #:	1		QUOTE DATE:
OPPORTUNITY #:	1		VALID THRU:
PROJECT #:			APPROVED:
JOB #:			SUBMITTED:
QUOTE BY:	RDS	PURGE:	No
SALES REP:	RDS	Robert D. Smith	PURGE DATE:
		CLOSE %:	0.0
		GEN PART:	No
SHIP WEIGHT:	439.5	lbs	SHIP DAYS:
SHIP VIA:	UPS	UNITED PARCEL SER.	OPEN TASKS:
PAY TERMS:	N30	NET 30 DAYS	NET CHARGE:
METHOD:	Cost-Plus	FACTOR:	1.5
PRICE LIST:	1		FREIGHT:
TAXABLE:	No	RATE:	0.0 %
			0.0 %
			SALES TAX:
			\$0.00
			QUOTE TOTAL:
			\$28429.43

Quote Items

LINE	PART NUMBER	QUANTITY	UNIT	UNIT PRICE	EXTENDED	CFG STATUS
1	DEM-01-APRON	50.0000	EA	\$173.6969	\$8684.85	Pending
2	DEM-02-LOAD-CTR-BOX	25.0000	EA	\$198.0316	\$4950.79	Pending
3	DEM-03-BOTTOM-DLH	35.0000	EA	\$168.2720	\$5889.52	Pending
4	DEM-04-HOUSING	10.0000	EA	\$210.9056	\$2109.06	Pending
5	DEM-05-PANEL	40.0000	EA	\$165.5053	\$6620.21	Pending

PRO8

Update Quote Information

OVR

QUOTE

Update

Items

Configure

Notes

Ship

... Print

Letter

eXcel

Documents

Format

staTus

schedule

Orders

Work-Queue

QUIT

2.2 – Sales Quote Item Configuration / Cost Rollups

6. Select **“Items > Update”** and select **LINE #: 1 (DEM-01-APRON)** followed by **“OK”** to display the following screen form and menu options:

The screenshot shows the 'PROSPECT QUOTE: Global Edge Windows Demo Server' window. The 'Quote-Item' tab is active. The 'Update' button is highlighted in the right-hand menu. The main form displays the following data:

QUANTITY	UOM	UNIT PRICE	EXTENDED
ORDER: 50.0000	EA	\$173.6969	\$8684.85
DISCOUNT:	%		
WEIGHT: lbs		0.09	4.5
OVER/UNDER: 0.0 / 0.0	%		

Other fields include: CUST #: 1001, ABC MANUFACTURING; QUOTE #: 1001; ITEM #: 1; OPEN TASK #: ; PART #: DEM-01-APRON; PROJECT PHASE: ; LIST PRICE: \$0.00; STANDARD COST: \$173.6969; QUOTE COST: \$173.6969; ROLL-UP COST: \$173.6969; MFR. SET-UP COST: \$144.0000; ONE TIME CHARGE: \$0.0000; PRICE METHOD: Manual; FACTOR: 1.2; ON HAND: 0.0000; TAXABLE?: No; PRICE LIST #: 1; CONFIG STATUS: Pending; CERTIFIED MATERIAL?: No.

7. The next step is to select **“Configure”** option which will execute the Routing Configurator to generate routing steps for the selected part and automatically rollup the time and material costs based on the imported CAD part parameters. When the Routing Configurator is done executing, select the **“Update”** option to update the part quantity and extended pricing:

The screenshot shows the 'PROSPECT QUOTE: Global Edge Windows Demo Server' window. The 'Update' button is highlighted in the right-hand menu. The main form displays the following data:

QUANTITY	UOM	UNIT PRICE	EXTENDED
ORDER: 50.0000	EA	\$173.6969	\$8684.85
DISCOUNT:	%	\$-173.6969	
WEIGHT: lbs		0.09	4.5
OVER/UNDER: 0.0 / 0.0	%		

Other fields include: CUST #: 1001, ABC MANUFACTURING; QUOTE #: 1001; ITEM #: 1; OPEN TASK #: ; PART #: DEM-01-APRON; PROJECT PHASE: ; LIST PRICE: \$0.00; STANDARD COST: \$173.6969; QUOTE COST: \$173.6969; ROLL-UP COST: \$173.6969; MFR. SET-UP COST: \$144.0000; ONE TIME CHARGE: \$0.0000; PRICE METHOD: Manual; FACTOR: ; ON HAND: 0.0000; TAXABLE?: No; PRICE LIST #: ; CONFIG STATUS: Standard; CERTIFIED MATERIAL?: No.

8. Select **"F10-Quantity"** option to display Quantity Pricing Screen:

PROSPECT QUOTE: Global Edge Windows Demo Server

Quote-Item Quantity-Pricing Bill-of-Materials Nestings Image

PART #: DEM-01-APRON APRON

LIST PRICE: [REDACTED]

ROW	QUANTITY	UNIT COST	UNIT PRICE	EXT.COST	EXT.PRICE
1	1.0000	\$173.6969	\$208.4400	\$173.6969	\$208.44
2	10.0000	\$44.0969	\$52.9160	\$440.9690	\$529.16
3	50.0000	\$32.5769	\$39.0924	\$1628.8450	\$1954.62
4	100.0000	\$31.1369	\$37.3643	\$3113.6900	\$3736.43
5	250.0000	\$30.2729	\$36.3275	\$7568.2250	\$9081.88

OK
Cancel
Insert
Append
Delete

OVR

2.3 – Generate PDF Sales Quote Report

9. Return to QUOTE menu and select **“Print”** option to generate Sales Quote Report:

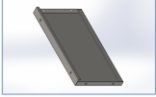
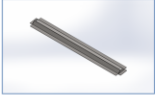
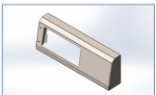
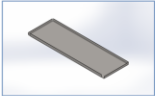
Sample Sales Quote

PAGE: 001



1000 West Product Avenue
 P.O. Box 5544
 Productionville, WI 55555
 Phone: 262-695-1300 Fax: 262-695-1313
 www.ldcglobal.com

PRICE QUOTATION

SUBMITTED TO:				SHIP TO:		CUST ID: 1001	
ABC Manufacturing Company 5000 West Industrial Way Milwaukee, WI 55555 United States of America				ABC Manufacturing Company 5000 West Industrial Way Milwaukee, WI 55555 United States of America		CONTACT: Robert Smith, V.P. of Engineering E-MAIL: rsmith@abc-manufacturing.com PHONE: 414-555-1100 FAX: 414-555-1105	
QUOTE #	REV #	QUOTE DATE	VALID THRU	SHIP VIA	DAYS2SHIP	PAY TERMS	SALES REP.
1001		04/03/2022	05/02/2022	BEST WAY	10	NET 30 DAYS	Robert Smith
QTY. QUOTED	UOM	PART #	DESCRIPTION		TAX	UNIT QUOTE	EXTENDED
50.000	EA	DEM-01-APRON	APRON 		N	173.6969	8,684.85
25.000	EA	DEM-02-LOAD-CTR-BOX	LOAD CENTER BOX 		N	198.0316	4,950.79
35.000	EA	DEM-03-BOTTOM-DLH	BOTTOM DISPLAY LIGHT HOUSING 		N	168.2720	5,889.52
10.000	EA	DEM-04-HOUSING	SHEET METAL HOUSING 		N	210.9056	2,109.06
40.000	EA	DEM-05-PANEL	SHEET METAL PANEL 		N	165.5053	6,620.21
** PAYMENT SCHEDULE **						QUOTE SUB-TOTAL:	28,254.43
						SALES TAX:	0.00
						FREIGHT:	175.00
						QUOTE TOTAL:	\$28,429.43