



MEMO re : Quoting enhancements

Date : October 27, 1995
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To : Chip DeMois, Bill Franklin, Ken Fultz
Copies : Dan Amidon, Terri Barnard, Matt Bethel, Lyuda Fishman, Karen Nicholson, Chris Roberts

Representatives from Planning, Pricing and MIS met this morning to discuss enhancements needed in the Job Spec and quoting systems to improve efficiency and to facilitate the reorganization.

The current "cut-and-paste" method of producing a quote letter was necessary because of the older versions of Word and MacEmulate used when this procedure was started. We are going to change the screen capture program to produce a text file which can be transferred automatically from Mad Max to the Macintosh. We're also going to write a WordBASIC macro which will format the text file (changing font, setting up tabs, removing hard returns, inserting salesperson's signature graphic).

We're going to change the format of the data being captured. We will add "estimating notes" fields to module 2 for each component and to module 11 for finishing. Planners will enter free-form text in these fields to describe the bindery for each job, to describe outside purchases, and to describe kit components, and the screen capture program will put these descriptions in the appropriate places on the quote letter.

Matt is going to provide a list of additional changes involving wording, listing a rule for each. For example, he wants the ink colors listed after number of colors, and he wants wording such as "with screens not to exceed 120 line" added for certain presses.

We will also change the program to put the quote summary costs in a table on the quote letter. Makeready, run/M and plates costs will be transferred automatically, and spaces will be left for Pricing to type prep and proof costs. All SRT modules on a job will be combined into a "Text press" line and a "Text stock" line on the table. Transparency modules will be combined into a "Transparency press" line and a "Transparency stock" line. Components with like descriptions will be combined into appropriate "press" and "stock" lines (i.e., all M7's with "CARDS" into one set of lines and all M7's with "POSTERS" into another set). "Bindery" will have one line in the table for a job.

We will create a quote letter for kits. Planning will enter an RFQ for kits, listing components on M2 with an RFQ# and estimating notes for each. The quote letter will print the estimating notes from M2 and the costs from the component RFQ.

To accomodate kits and outside purchases, we'll add a "group:" field to M2. This will be an integer number. Components which have the same group number will be combined into one section on a quote letter, using the estimating notes from the first component with that group number and using the total cost of all the components with that group number. For example, a job might have an audiocassette, an audiocassette label and a audiocassette case listed separately; if they each are given a group number of 2, they'll be listed as one item on the quote letter.

Lyuda is working on the WordBASIC macro, and Karen is working on setting up the automatic file transfer. We'll then work on adding the estimating notes and group fields to the screens and incorporating their data into the letter, on programming Matt's new rules, and then on kit quote letters.

Task	Estimated time	Estimated due date
WordBASIC macro (1st pass)	16 hours	11/1
Automatic file transfer	16 hours	11/1
Estimating notes and group fields	16 hours	11/6
Incorporating estimating notes into quote letter	16 hours	11/6
Programming Matt's new rules	16 hours	11/9
WordBASIC macro (2nd pass) [adjusting for above changes]	4 hours	11/10
Kit quote letters	24 hours	11/16
WordBASIC macro (3rd pass) [adjusting for kit quote letters]	6 hours	11/17

These times are initial estimates. Dates are based on postponing other BASIC projects until after this project and on receiving information in a timely manner (for example, Matt's new rules by 11/6).

Also, MacEmulate includes a demo version of Zmodem. We may need to purchase the full version of the Zmodem tool in order to get the file transfer working.