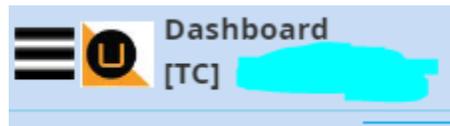
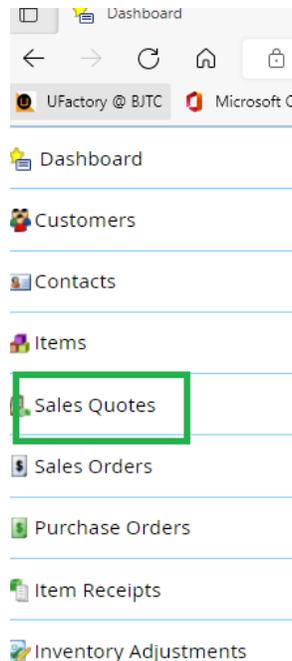


## How to import files from 2020 to Ufactory

- When in 2020 and the order is ready to export, export the file as a .txt file. Use a name that is specific to your Purchase Order, track, job, or anything that identifies the specific job. Save the job in a specific location on you PC for quick access to the .txt file.
  - Please note that when you create the export file, you must select the following fields:
    - **Qty, Manufacturers Code and Description** These are the only fields required to import to Ufactory. However, you can select more fields to display on the 2020 export, but it won't affect what Ufactory will do automatically.
- When ready to import to Ufactory, please go to the web address of <https://ufactory.nationscabinetry.com> and sign in with your provided credentials.
  - These credentials are provided to you via Lena Lastra.
- When you first log into Ufactory (A.K.A. "Smart Client"), it should take you to your Dashboard and click on the Hamburger Menu Icon which looks like this below.



- When you click on the Hamburger Menu Button it will bring up modules available to you in Ufactory, as shown below. Next you will click on Sales Quotes.



- Now that Sales Quotes is opened, you are ready to begin the Import process. Start by going to the “Actions” drop down as shown below. This example shows where the “Actions” drop down has been clicked. Click on “Create” and Ufactory will then return a new screen where you will input information that is pertinent to your specific Quote.

The screenshot shows the 'Sales Quotes' application interface. At the top, there is a header with a logo and the text 'Sales Quotes [TC] CHRIS VAIL'. Below the header is a search bar with the text 'Open' and a dropdown arrow. To the right of the search bar is an 'ACTIONS' dropdown menu. Below the search bar is a table with the following columns: QUOTE NO., QUOTE DATE, QUOTE TYPE, CUSTOMER NAME, CUST PO NO., PROJECT PHASE, PROJECT NAME, and SALESPERSON. The table contains one row of data: 264801, 8/9/2022, REGULAR, EXCEL CABINETS & COUNTERTOPS INC, BOBBI ALLGAIER MOM IN LAW, (blank), (blank), and RICHAR KNUDS. To the right of the table is a vertical menu with the following options: + CREATE, VIEW, PRINT, SETTINGS, and EXPORT.

QUOTE NO.	QUOTE DATE	QUOTE TYPE	CUSTOMER NAME	CUST PO NO.	PROJECT PHASE	PROJECT NAME	SALESPERSON
264801	8/9/2022	REGULAR	EXCEL CABINETS & COUNTERTOPS INC	BOBBI ALLGAIER MOM IN LAW			RICHAR KNUDS

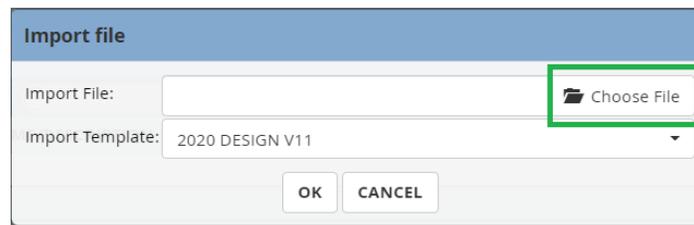
- Shown below is the first part of the Quote creation process: Please note that not all the fields must be filled out. This first screen is called the “General Tab”. Items with a green square around them are mandatory selections and the items with a blue square are automatically populated based on the Customer account # you will enter. Brand is in green and is a drop down for what Brand you will be ordering. The Brand field is what determines the styles and items that are available in the next step.

The screenshot shows the 'Create SQ 264805' form. At the top, there is a header with a logo and the text 'Create SQ 264805 [TC] CHRIS VAIL'. Below the header are 'BACK' and 'SAVE' buttons. The form has four tabs: 'General', 'Styles', 'Items', and 'Customer Message'. The 'General' tab is selected. The form contains the following fields: Quote Date (08/09/2022), Quote Type (REGULAR), Customer No. (empty), Customer Name (empty), Brand (TIDWELL), Salesperson (empty), Project Phase (empty), Project Name (empty), Project Description (empty), Cust PO No. (empty), Cust PO Amount (empty), Ship-to (empty), Load No. (empty), Shipping Method (STP), and Sales Tax Area (NONE). The 'Quote Type', 'Brand', and 'Cust PO No.' fields are highlighted with a green border, indicating they are mandatory. The 'Customer No.', 'Customer Name', 'Salesperson', 'Project Phase', 'Project Name', 'Project Description', 'Ship-to', and 'Load No.' fields are highlighted with a blue border, indicating they are automatically populated.

- After the “General Tab” is filled out, you will go to the “Items” tab. (**Styles tab will be last**). If you enter the style information before you import the items, the import will wipe out some of the selections that were previously entered in “Styles”, and you will be forced to make those selections again. Save time and do the items first. Shown below is the “Items” Tab.



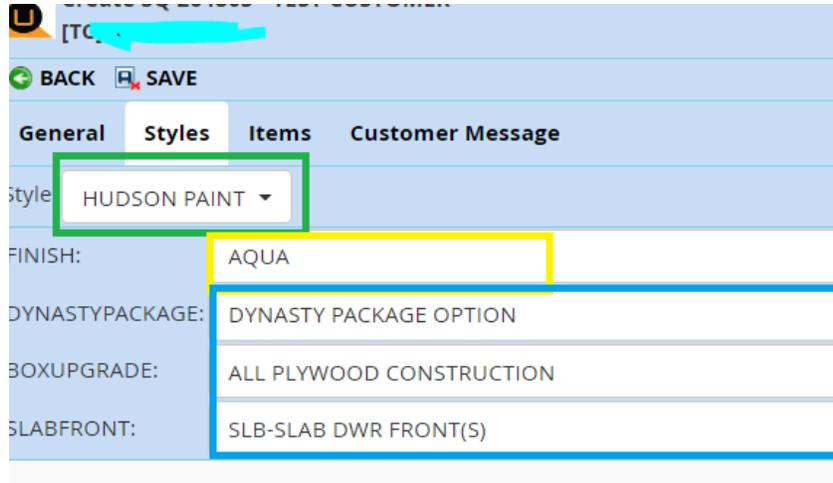
- Next, click on the Import button highlighted in green above. This will prompt a popup as shown below. Click the “Choose File” button and find where you saved the .txt file to. Once you do this the program will remember this location for future imports.



- At this point in the process, select the file you would like to import into Ufactory. The list of items in the .txt file that was selected will immediately display since the style, finish and other possible global options have not been selected. However, it will not show any pricing yet and should look something like below.

	QUANTITY	ITEM NO./UPC	ITEM NAME/DESCRIPTION	UOM	UNIT COST	LIST PRICE
+	1	W3630-BPD	W3630-BPD	EACH	0.00	0.00
+	1	W3012-BPD	W3012-BPD	EACH	0.00	0.00
+	1	W2430-BPD	W2430-BPD	EACH	0.00	0.00
+	1	W3612-BPD	W3612-BPD	EACH	0.00	0.00
+	1	W2430-BPD	W2430-BPD	EACH	0.00	0.00
+	1	W1530	W1530	EACH	0.00	0.00
+	1	W1530	W1530	EACH	0.00	0.00
+	1	W3030-BPD	W3030-BPD	EACH	0.00	0.00
+	1	W4542	W4542	EACH	0.00	0.00
+	1	DB36PP	DB36PP	EACH	0.00	0.00
+	1	DWEP3	DWEP3	EACH	0.00	0.00
+	1	DB24PP	DB24PP	EACH	0.00	0.00
+	1	DB18PP	DB18PP	EACH	0.00	0.00
+	1	SB36-BPD	SB36-BPD	EACH	0.00	0.00
+	1	BTC18.2.SC	BTC18.2.SC	EACH	0.00	0.00
+	1	B27-BPD	B27-BPD	EACH	0.00	0.00
+	1	DWEP3	DWEP3	EACH	0.00	0.00
+	1	FS330	FS330	EACH	0.00	0.00
+	5	QR	QR	EACH	0.00	0.00

- The next step is to select the Style, Finish, and other possible global options. Select the “Styles” tab. In this example, the style selected is HUDSON PAINT, the finish is AQUA. This example also includes some global options to the order which were DYNASTY PACKAGE OPTION, ALL PLYWOOD CONSTRUCTION and SLAB DRAWER FRONTS. This information is shown below.



- Note that when selecting a style, only the styles that are available by the Brand are displayed. Once the style is selected, it will only show the available finishes for the selected style. Also, the global options are also dictated by the style. Not all options are always available for all our styles, as each style has different attributes, this is just an example.
  - Once the “Styles” tab is completed, you can click the SAVE button on the top. Depending on the amount of line items, this can take several minutes to complete. Please be patient while the system calculates pricing for all the line items entered. The amount of time it takes per item is usually about 6 - 8 seconds for cabinets and 1 - 3 seconds per accessory item.
- Once the order has completed saving, all the information can be verified by going to “Items” and you will notice that all pricing is there with more additional information as shown below. A customer message can also be added to the order if you want to add something special or provide a note for you Customer Service Representative.

QUANTITY	ITEM NO./UPC	ITEM NAME/DESCRIPTION	UOM	UNIT COST	LIST PRICE	MULTIPLIER	NET PRICE	AMOUNT
1	W3630-BPD	W3630-BPD	EACH	101.55886	874.16	0.34701	295.99	295.99
1	W3012-BPD	W3012-BPD	EACH	49.80962	447.44	0.34702	155.27	155.27
1	W2430-BPD	W2430-BPD	EACH	79.75046	587.52	0.347	203.87	203.87
1	W2612-BPD	W2612-BPD	EACH	56.62018	466.88	0.34701	169.95	169.95
1	W2430-BPD	W2430-BPD	EACH	79.75046	587.52	0.347	203.87	203.87
1	W1530	W1530	EACH	56.821	421.60	0.34701	146.30	146.30
1	W1530	W1530	EACH	56.821	421.60	0.34701	146.30	146.30
1	W3030-BPD	W3030-BPD	EACH	95.95813	697.68	0.34701	243.10	243.10
1	W4542	W4542	EACH	172.19722	1,261.36	0.34701	472.40	472.40
1	D830PP	D830PP	EACH	283.46398	1,887.68	0.347	655.03	655.03
1	DWEF2	DWEF2	EACH	34.14261	162.00	0.34704	56.22	56.22
1	DQ29PP	DQ29PP	EACH	220.05115	1,280.72	0.347	437.47	437.47
1	D818PP	D818PP	EACH	190.20111	1,124.24	0.34701	393.59	393.59
1	S836-BPD	S836-BPD	EACH	128.29127	1,040.90	0.347	361.02	361.02
1	RTC18.2-5C	RTC18.2-5C	EACH	285.17486	3,379.36	0.347	790.04	790.04
1	B27-BPD	B27-BPD	EACH	152.71413	1,089.36	0.347	378.01	378.01
1	DW9PF3	DW9PF3	EACH	34.14264	162.00	0.34704	56.22	56.22
1	F2326	F2326	EACH	4,070.73	65.10	0.347	29.53	29.53
5	QK	QK	EACH	6.49394	74.00	0.34702	25.98	129.90
3	TKO	TKO	EACH	3.54109	95.00	0.34705	32.97	98.91
1	OSC1	OSC1	EACH	12.22664	120.00	0.347	41.64	41.64
4	FM1 1/4	FM1 1/4	EACH	7.10151	105.00	0.34705	36.44	145.76

A quote has now been successfully imported in Ufactory via the 2020 design program.

We are always looking to improve our customer's experience. If you or anyone in your organization needs additional information or has a common issue that arises, please contact us. We can explain how to correct the issue, or we can submit an enhancement request to our software provider to get a resolution in place as quickly as possible.

Thanks,

Nations Staff.