

2. LOGGING IN

- a. www.usmtc.com
- b. Type your email address for the username
- c. Type your password from the email you have received
- d. Click the red **Submit** button

3. COMPANY PROFILE MANAGEMENT

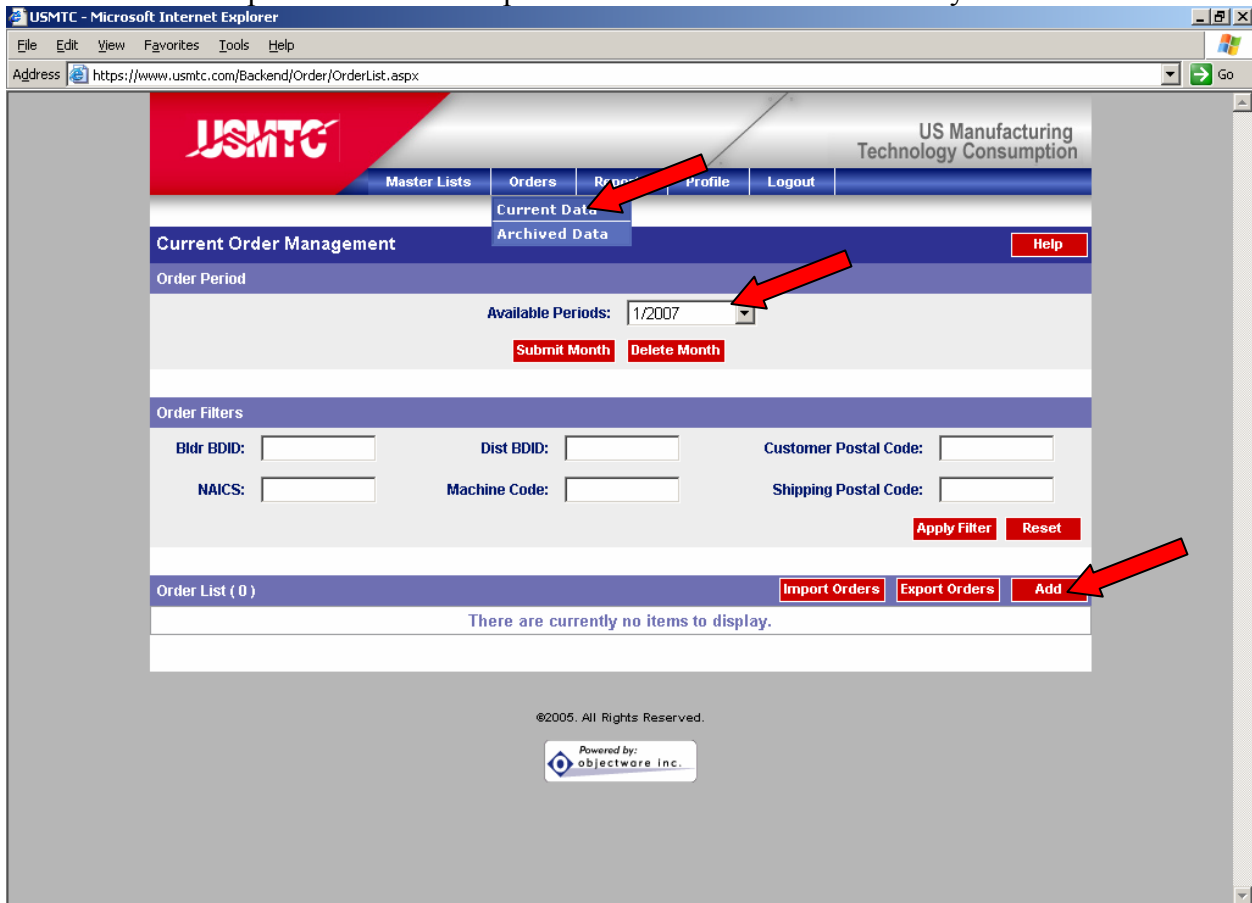
- a. Click **Profile** at the top of your screen
 - i. Click **Edit** to change company information
 - ii. Click **Add** to add a new user to company profile
 - iii. Click email address of existing users then **Edit** to change password, phone number, email address etc.

The screenshot shows the USMTC web application interface. At the top, there is a navigation menu with items: Master Lists, Orders, Reports, Profile, and Logout. The 'Profile' menu item is highlighted with a red arrow. Below the navigation menu, the page title is 'US Manufacturing Technology Consumption'. The main content area is titled 'Profile Info' and contains a 'Participant Profile Detail' section. This section lists various fields: Name (Objectware Builder), Role (Builder), BDID (617127), AAID (100765), Street Address 1 (5555 Triangle Parkway), Street Address 2, City (Norcross), State / Province (GA), Country (UNITED STATES), Postal Code (30092), Is Active (Yes), and Approved By (admin@objectwareinc.com). To the right of the 'Participant Profile Detail' section, there are two red buttons: 'Help' and 'Edit'. The 'Edit' button is highlighted with a red arrow. Below the profile details is a 'Profile Contact List (2)' section. It contains a table with columns: Username / Email, Name, Company, Contact Type, Title, and Phone. The table has two rows of data. The first row has the email address 'builder@objectwareinc.com' highlighted with a red arrow. The second row has the email address 'vtran@objectwareinc.com'. To the right of the contact list, there is a red 'Add' button highlighted with a red arrow. The browser window title is 'USMTC - Microsoft Internet Explorer' and the address bar shows 'https://www.usmtc.com/Backend/ParticipantProfile.aspx'.

Username / Email	Name	Company	Contact Type	Title	Phone
builder@objectwareinc.com	Vinh Tran	Objectware Builder	Main	Builder	770-555-1234
vtran@objectwareinc.com	Vinh Tran	Objectware Builder	User	Developer	770-555-1234

4. ADDING ORDERS

- a. Click **Orders** on the menu bar
- b. Click **Current Data** to add new orders
- c. Select the **Available Periods**. These are months where there are no orders submitted.
- d. On the next screen **Current Order Management**, click **Add** at the middle right to open the form that captures all of the information about your orders.



- e. **Builder List** and **Distributor List** buttons will show you tables for system recognized builder and distributor companies.
 - i. Finding items in **all** lookup lists can be accomplished by using the search and filter fields at the top of each of the lookup tables. The search will look through the list and return any items **containing the word or phrase** you type. Remember to click the **Apply Filter** button to start the search.

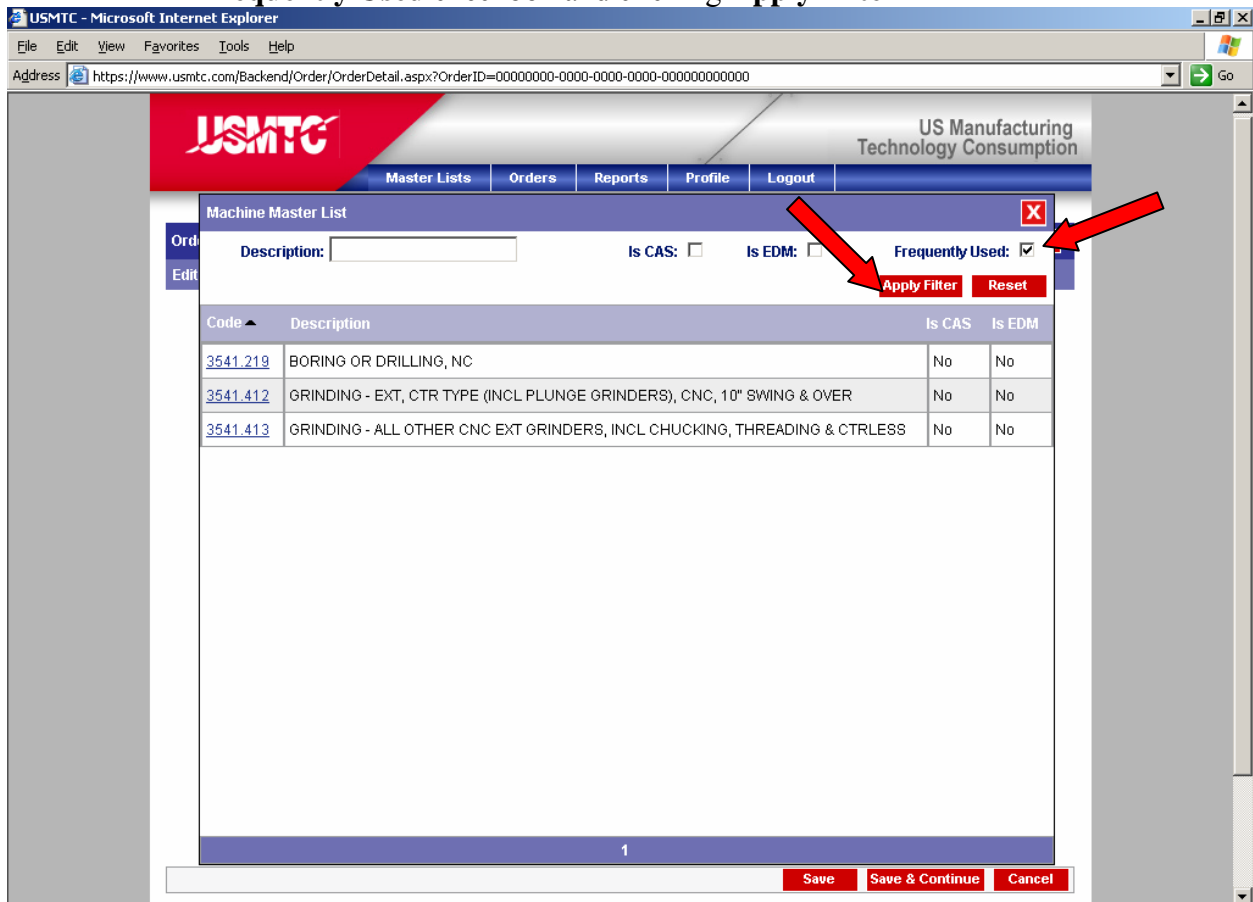
The screenshot shows a web browser window titled "USMTC - Microsoft Internet Explorer" with the address bar displaying "https://www.usmtc.com/Backend/Order/OrderDetail.aspx?OrderID=00000000-0000-0000-0000-000000000000". The page header features the USMTC logo and the text "US Manufacturing Technology Consumption". A navigation menu includes "Master Lists", "Orders", "Reports", "Profile", and "Logout". The main content area is titled "Order Info" and "Edit Order Detail". The form contains the following fields and buttons:

- Order Period: 1/2007
- * Builder BDID: 617127 (Buttons: **Builder List**, **Add Builder**)
- Builder Name: Objectware Builder
- * Dist. BDID: Please Select (Buttons: **Distributor List**, **Add Distributor**)
- Dist. Name:
- * NAICS Code: (Buttons: **Customer List**, **Industry Categories**)
- Customer Country: UNITED STATES (dropdown)
- Customer Zipcode:
- Shipping Country: UNITED STATES (dropdown)
- Shipping Zipcode:
- * Machine Code: Please Select (Button: **Product List**)
- * Units:
- * Total Sale:

At the bottom of the form are buttons for **Save**, **Save & Continue**, and **Cancel**. There are also **Help** and **Back to List** buttons in the top right corner of the form area.

- f. **Add Builder** and **Add Distributor** buttons allow you to request that a builder or distributor company that is not already in the database be added for future use. This request is sent to Admin and is then evaluated by association staff for approval.
- g. There are now three ways you can enter customer industry information into the NAICS Code field.
 - i. First, you can type the information directly into the field if you already know the 5 digit NAICS code.
 - ii. Second, you can click the **Customer List** button to find your customer in the master list of about 110k names. Use the filter criteria at the top of the lookup table to narrow the search.
 - iii. Third, you can click the **Industry Categories** button if you can't find the customer in the greater list but you do know what industry the customer does business in.

- h. Adding customers (See Master List)
- i. If you have selected an actual customer from the 110k list, the Customer Country and Customer ZipCode fields will auto-populate. If not, you will have to select the Customer Country from the list.
- j. Shipping Country and Shipping ZipCode fields must be selected and entered for every order
- k. Click the **Product List** button to view the available machine codes. Again the list will default to your frequently used. Uncheck the frequently used box to see all available machine codes. When found, click on the machine code link to populate the form.
 - i. If you are submitting a machining center order, a field will appear that asks you to select the axis capabilities of the machine. Please select either ≤ 4 or ≥ 5 .
- l. Type in the value of the order in the Total Sale field. Please no commas or dollar signs.
- m. Click **Save & Continue** to enter a new order OR Click **Save** to return to your new order list called the **Current Order Management Page**
- n. **Frequently Used** *- When looking up builders, distributors, or products, the corresponding lookup table that appears will default the list to that of your frequently used. This is a filter that you can manually turn off by deselecting the **Frequently Used** checkbox and clicking **Apply Filter**



5. EDITING AND DELETING ORDERS

- a. You can edit orders that have not been submitted for processing (Current Orders) by clicking the blue underlined date link “m/yyyy” to the left of the order you would like to edit.
 - i. In this order edit mode you will be given the option to delete the order by clicking the “Delete Order” button at the bottom right hand corner of the screen.
- b. You will not be able to edit orders again once they have been submitted so double check your order list before completing the next step.

USMTC - Microsoft Internet Explorer

Address: https://www.usmtc.com/Backend/Order/OrderList.aspx

USMTC US Manufacturing Technology Consumption

Master Lists Orders Reports Profile Logout

Current Order Management [Help](#)

Order Period

Available Periods: 1/2007

[Submit Month](#) [Delete Month](#)

Order Filters

Bldr BDID: Dist BDID: Customer Postal Code:

NAICS: Machine Code: Shipping Postal Code:

[Apply Filter](#) [Reset](#)

Order List (1) [Import Orders](#) [Export Orders](#) [Add](#)

Order Period	Builder	Motor	Customer Postal Code	Shipping Postal Code	NAICS	Machine Code	Units	Total Sale	Create Date
1/2007	1127	617127	14622	14622	33271	3541.412	1	\$125,000.00	5/29/2007

1

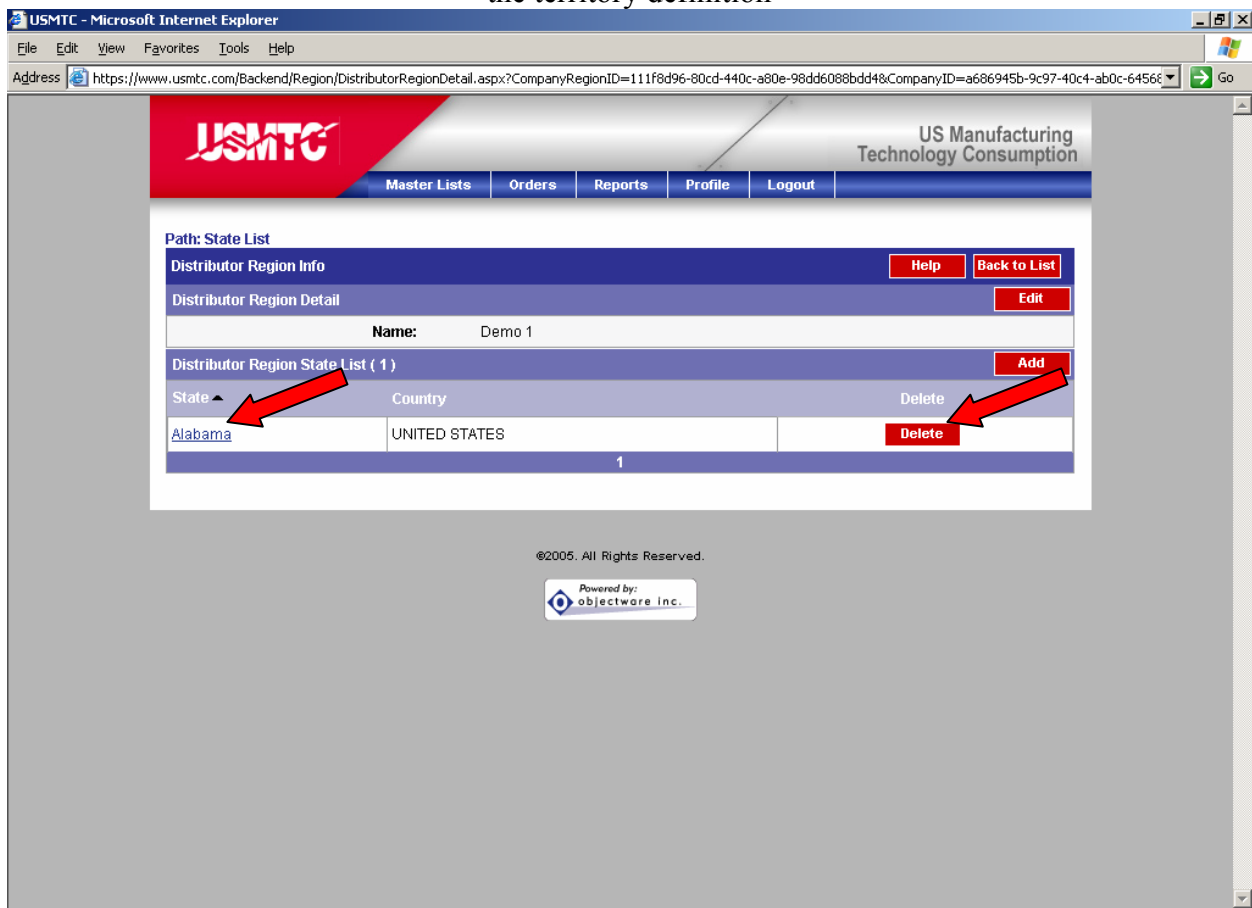
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6. SUBMITTING ORDERS FOR PROCESSING

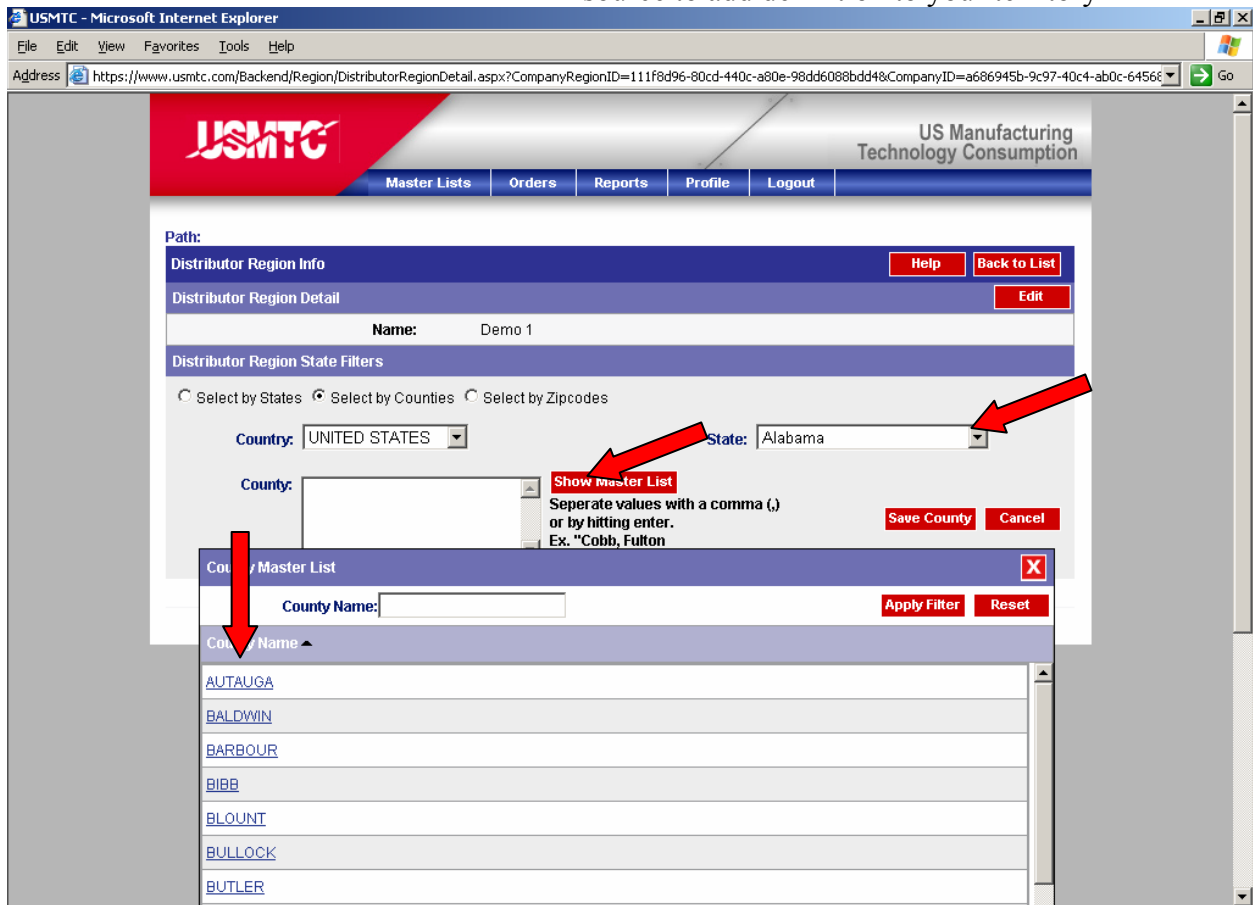
- a. When you are finished entering all of your orders for any particular month, you must send or submit your orders for processing. Click the **Submit Month** button located in the middle top half portion of the “Current Order Management Page”

- a. You can delete the entire state by clicking **Delete** to the right.
2. Click the underlined state link to drill down and view the counties used to define the territory within the state chosen
 - a. Next Page: You are viewing the counties used to define the territory within the state chosen
 - b. Click the **Delete** button to remove any county from the territory definition
3. Click the underlined county link to drill down and view the zip codes used to define the territory within the county chosen
 - a. Next page: You are viewing the zip codes used to define the territory within the state chosen
 - b. Click the **Delete** button to remove any one zip code from the territory definition



- e. **To add definitions to an existing territory (shown below)**
 - i. Click the blue underlined territory name
 1. Next Page: Click “Add” to add territory definition at the state, county or zip code level
 - a. To add a **whole state** to your territory definition, click the “Select by States” radio button
 - i. Select the country from the drop down menu

- ii. Check the boxes next to the states you would like to add and click “Save”
- b. To add a **whole county** (Shown Below) to your territory definition, click the “Select by Counties” radio button
 - i. Select a country and a state from the drop down menus
 - ii. Then either type in the name of the county into the box provided or click the “Show Master” button to find and select counties for the state selected.
 - iii. Then click “Save” when you are ready to save the counties to your territory definition
- c. To add a **series of zip codes** to your territory definition click the “Select by Zipcodes” radio button
 - i. Select the country and the state from the drop down menus
 - ii. Then type the zipcodes you wish to use into the box or copy and paste the zipcodes from an external source to add definition to your territory



Note: Territory reports are generated once a month and include market numbers that reflect the territory definitions assigned at the time the report processing has commenced. (Typically report processing occurs during the first week of every month) Changes to territory definitions can be made after the report processing, however these changes will not take affect until the next report processing has ended.

9. VIEWING REPORTS

- New reports will be made available after all current participants have entered orders for the current reporting period.
- Historical data is always available and can be viewed by selecting **Reports** in the main menu bar
- For any selected report in the menu option, you will be given the opportunity to customize your report view by selecting criteria from a varying number of drop down menus.
- Select the desired criteria from all of the menu items available (shown below) and then click the **View Report** button on the right hand side of the screen.
- Within seconds a customized view of the report you have selected will appear in the screen.

The screenshot displays the USMTC web application interface. The top navigation bar includes 'Master Lists', 'Orders', 'Reports', 'Profile', and 'Logout'. The 'Reports' menu is highlighted. Below the navigation bar, there are several dropdown menus for filtering the report: 'Machine Category' (with 'METAL CUTTING EQUIPMENT' selected), 'Machine Sub Category' (with 'HORIZONTAL LATHES' selected), 'Country' (with 'United States' selected), 'Region' (with 'Midwest' selected), and 'Year' (with '2007' selected). A 'View Report' button is located to the right of these filters. Below the filters, there is a search bar and an 'Export' button. The main content area shows the report title 'YTD Product Mix Orders By State - 2007 - Midwest Region' and a table of data.

		2007				
		Midwest				
		Illinois	Indiana	Michigan	Ohio	Wisconsin
METAL CUTTING EQUIPMENT HORIZONTAL LATHES	LATHES, HORZ, CNC - SWISS STYLE LATHES, CNC - UNDER 20MM BAR - 3541.511	Net Units Ordered	7			2
	LATHES, HORZ, CNC - SWISS STYLE LATHES, CNC - 20-25MM BAR - 3541.512	Net Units Ordered	7		2	2
	LATHES, HORZ, CNC - SWISS STYLE LATHES, CNC - OVER 25MM	Net Units Ordered	1	2		9

10. EXPORTING REPORTS

- a. Once the report has been created, you will have the ability to export the data into several different file formats.
- b. Just above the reported data there will be a field box containing the phrase **Select a format**. (shown above) Choose one from the list.
- c. To the right of this box click the word **Export**
- d. A dialog box will appear asking you where you would like to save the new file and what you would like to name it. Follow the options to complete the export.

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