

Getting Started with USMTO



AMT – The Association for Manufacturing Technology

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Contents

Starting Out.....	2
Due Dates.....	2
Registering with USMTO.....	3
USMTO Vocabulary.....	5
Logging in.....	6
Company Profile Management.....	7
Adding Orders.....	8
Builders and Distributors.....	9
Adding Customers.....	12
Machine Codes.....	15
Importing Orders.....	17
Editing and Deleting Orders.....	20
Submitting Orders for Processing.....	21
Entering Order Cancellations.....	22
Defining Territories.....	23
Creating New Territories.....	23
Setting up the Geography.....	24
Modify an Existing Territory.....	28
Viewing Reports.....	31
Contact Information.....	34



Starting Out

Welcome to USMTO!

As a participant of the USMTO program you will have access to the most current and comprehensive machine tool market information available. You will have the ability to zero in on market conditions for the products they manufacture or carry. Statistical reports slice the manufacturing technology market by several sections including product statistics over time, by geography, and even customizable territory areas.

The USMTO program tracks and reports orders within 35 days after the end of the month for:

- Cutting type manufacturing technology
- Forming type manufacturing technology
- Other manufacturing technology

Data is collected at a transaction level which enables multi-dimensional reporting across time, geographic region and end user industry. This guide will cover the basics of data entry and report generation.

Due Dates

USMTO data is due on 10th of the following data month. All reports are processed on the first Monday of the month following the due date.

For example, orders for the month of February would be due March 10th. If orders are not turned in by then we will send reminder emails to you until we process reports for February on the first Monday of April.

[Click here to find answers to more Frequently Asked Questions](#)

Registering with USMTO

Companies interested in participating in USMTO must register through the [USMTO website](#).

1. Click the [Register Now](#) button above the login screen.
2. Select the facility description that best fits your company (screenshot below) and click **Next**.



USMTO US Manufacturing Technology Orders
A joint statistical program of AMT & AMTDA

HOME LATEST PRESS RELEASE FAQ CONTACT US

REGISTER - STEP 1

If you are ready to participate in USMTO, please complete Steps 1 and 2 of the registration process. I will submit data for my firm as a:

- BUILDER ...** reporting from a single location, the builders' products manufactured in home country PLUS imports for orders. Builders also report export data.
- BUILDER WITH DIRECT SALES ...** reporting from a single location, the builders' products manufactured in home country, plus imports for orders with the intent to receive both national reports, and geographic reports for their direct sales areas. Builders also report export data.
- DISTRIBUTOR ...** reporting from a single location, all orders for that single location.
- DISTRIBUTOR ...** reporting from a single location, all orders from multiple branches or territories.
- MASTER DISTRIBUTOR ...** reporting from a single location, all products manufactured in home country plus imports for orders with the intent to receive both national reports, and geographic reports for their direct sales areas. Master Distributors also report export data.

[NEXT >>](#)

Note: Builders that sell directly to their customers will report as both a builder and a distributor.

3. Fill in company contact information. The primary data entry contact will be considered the main contact for USMTO.
4. Clicking **Next** will submit your company for approval. You will hear back from USMTO admin within the next few business days.



From the USMTO landing page, you can access:

- [Latest Press Release](#). Brings up USMTO’s most recent press release, which you can download in PDF format.
- [FAQS](#). List of common questions brought up about USMTO. This is kept updated as clarification about the program is needed.
- [USMTO Product List](#). Click the “Product Covered” link to download a PDF listing of available USMTO machine categories we report, along with their listed codes.
- [Sample Reports](#). For those interested in getting started with USMTO, this offers a flavor of the type of data you’ll be able to access.
- [Current Participants](#). USMTO coverage of the manufacturing technology sector is always growing. Check here to see who is participating.

HOME LATEST PRESS RELEASE FAQ CONTACT US

USMTO US Manufacturing Technology Orders
A joint statistical program of AMT & AMTDA

Participate Now in USMTO

[Register Now!](#)

PARTICIPANT LOGIN

USERNAME:

PASSWORD:

[SUBMIT >>](#)

[»Forgot Password](#)

[»Register Now](#)

USMTO FEATURES

Detailed Manufacturing Technology Market Data

- Timely, Comprehensive, Confidential
- Available to Builders and Distributors
- 180 Manufacturing Technology Product Categories
- National and State Time Series Orders Data
- Geographic Sales Territory Orders Data
- Machine Orders by End User Industry

MORE INFO

- [Confidentiality](#)
- [Products Covered](#)
- [Current Participants](#)
- [USMTO History](#)
- [Sample Builder Report](#)
- [Sample Distributor Report](#)

USMTO Vocabulary

BDID – The number assigned to a USMTO participant (builder or distributor). Multiple facilities may share the same BDID if they belong to the same company.

AAID – Uniquely identifies each participating facility.

NAICS (North American Industry Classification System) – The federal classification system for business establishments in North America. ([Click here for more information.](#)) USMTO uses the five-digit version of this number for its reports to tabulate end-user industries for manufacturing technology firms.

Territories – User-defined geographic regions that participants may set up to analyze their market share for specific areas of interest. Territories are often used to track participant’s distributor or sales network.

Machine Codes – USMTO’s seven-digit code that classifies manufacturing technology covered by the survey.

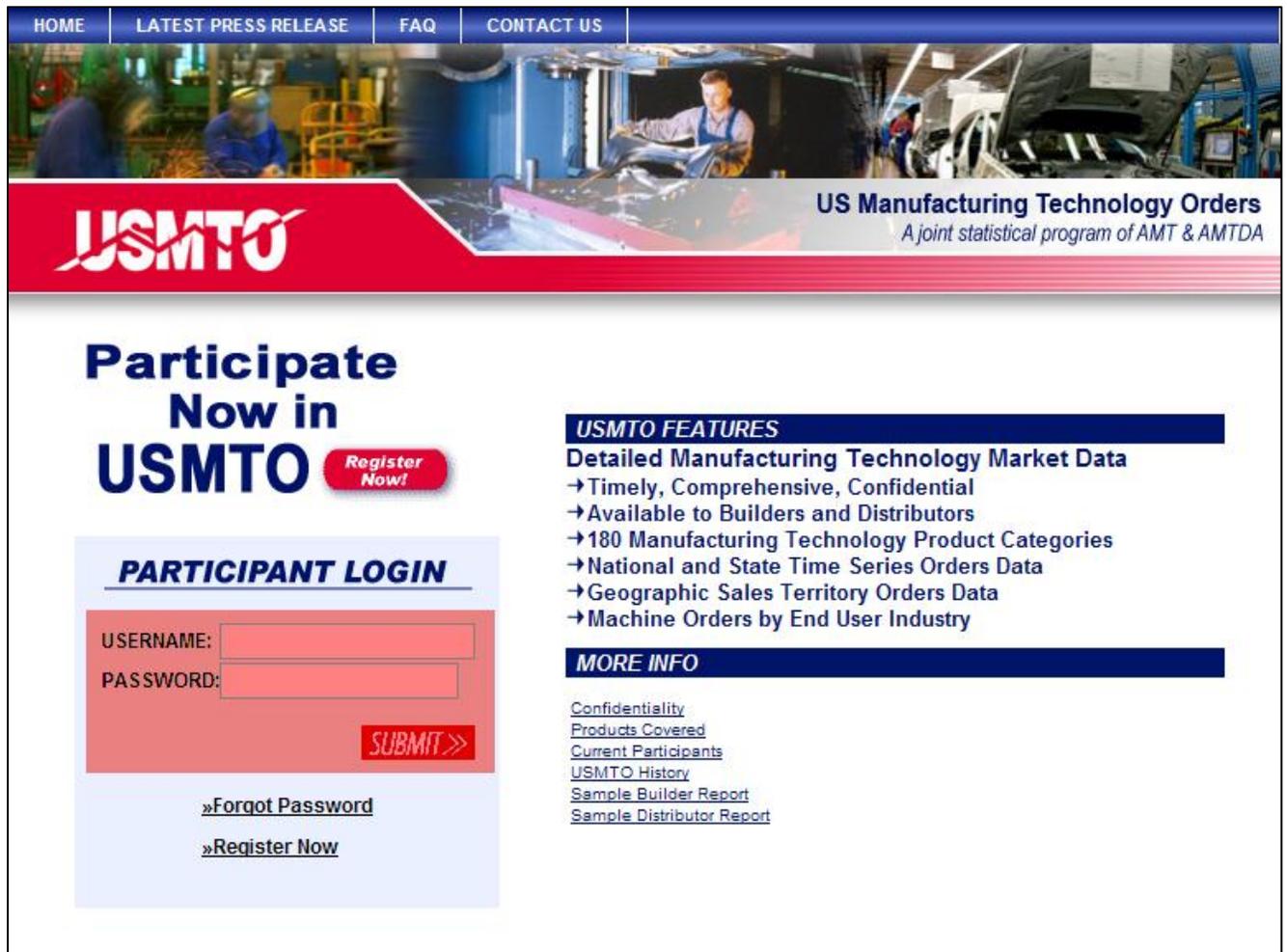
Customer/Shipping Zip Codes – When entering USMTO order data, the “Customer zip code” refers to the customer’s billing location, while the “shipping zip code” refers to the location where the machine will be physically installed.

Logging in

Once you have a username and password set up, you may log in to USMTO.

1. Access www.usmto.com.
2. Type your email address for the username.
3. Type your password from the email you have received.
4. Click the red **Submit** button.

***Tip:** Forgot or lost your password? Click the **Forgot Password** link below the Participant Login, enter your email address and click Submit. A message will be sent to your registered email address containing your password.*

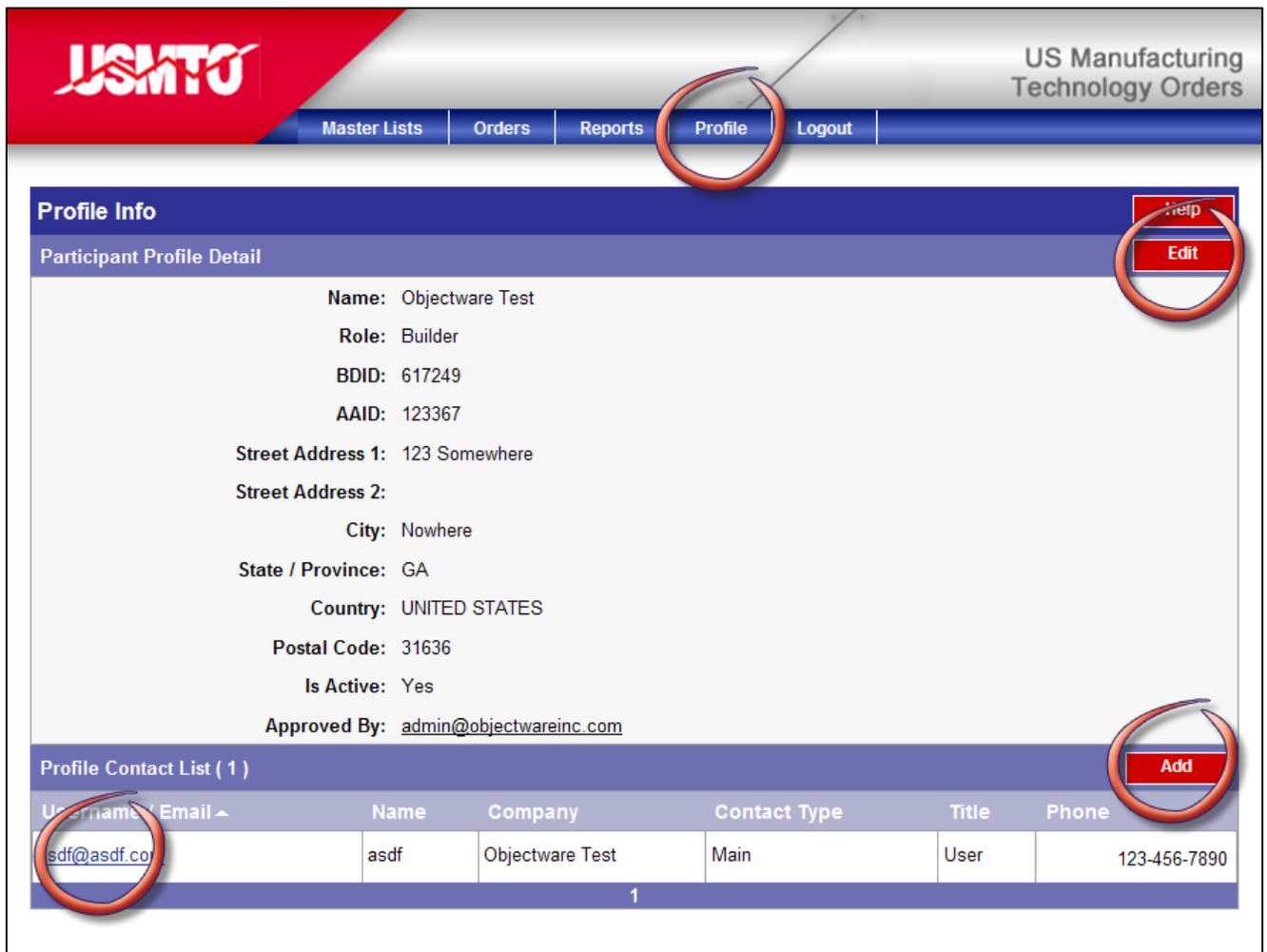


The screenshot shows the USMTO website's participant login page. At the top, there is a navigation menu with links for HOME, LATEST PRESS RELEASE, FAQ, and CONTACT US. Below the menu is a banner image of a factory floor with workers. The USMTO logo is prominently displayed on the left side of the banner, and the text "US Manufacturing Technology Orders" and "A joint statistical program of AMT & AMTDA" is on the right. The main content area features a large heading "Participate Now in USMTO" with a "Register Now!" button. Below this is a "PARTICIPANT LOGIN" section with input fields for USERNAME and PASSWORD, a red "SUBMIT >>" button, and links for "»Forgot Password" and "»Register Now". To the right of the login section, there are two dark blue headers: "USMTO FEATURES" and "MORE INFO". Under "USMTO FEATURES", there is a list of detailed manufacturing technology market data features, including "Timely, Comprehensive, Confidential", "Available to Builders and Distributors", "180 Manufacturing Technology Product Categories", "National and State Time Series Orders Data", "Geographic Sales Territory Orders Data", and "Machine Orders by End User Industry". Under "MORE INFO", there are links for "Confidentiality", "Products Covered", "Current Participants", "USMTO History", "Sample Builder Report", and "Sample Distributor Report".

Company Profile Management

All USMTO users may edit their own profile details (username, password, job title, contact info etc.). The user designated as “Main” may also edit company contact information, delete users, and modify other users’ profiles.

1. Click **Profile** at the top of your screen.
2. Click **Edit** to change company information.
3. Click **Add** to add a new user to company profile.
4. Click email address of existing users then **Edit** to change password, phone number, email address etc.



USMTO US Manufacturing Technology Orders

Master Lists | Orders | Reports | **Profile** | Logout

Profile Info [Help](#)

Participant Profile Detail [Edit](#)

Name: Objectware Test
Role: Builder
BDID: 617249
AAID: 123367
Street Address 1: 123 Somewhere
Street Address 2:
City: Nowhere
State / Province: GA
Country: UNITED STATES
Postal Code: 31636
Is Active: Yes
Approved By: admin@objectwareinc.com

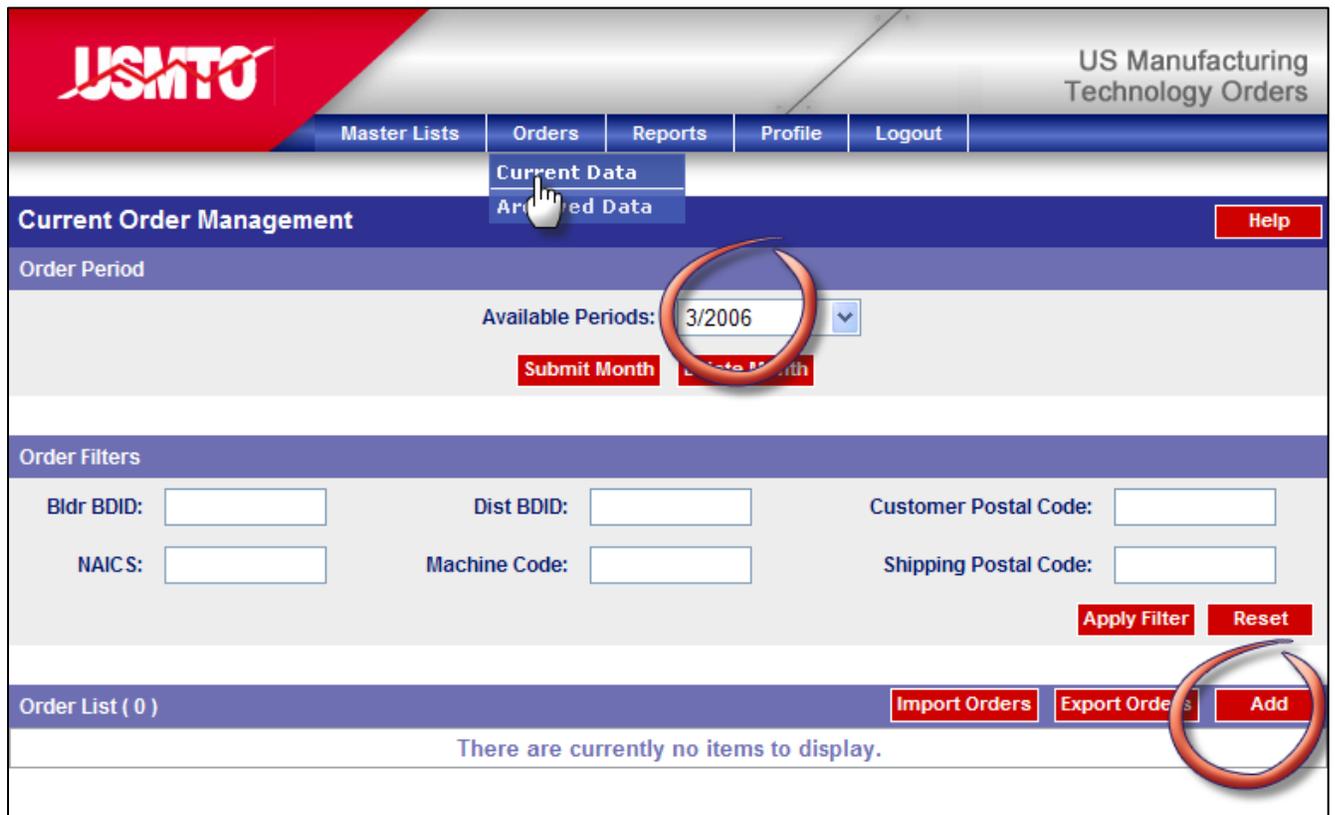
Profile Contact List (1) [Add](#)

Username / Email	Name	Company	Contact Type	Title	Phone
asdf@asdf.co	asdf	Objectware Test	Main	User	123-456-7890

1

Adding Orders

1. Click **Orders** on the menu bar.
2. Click **Current Data** to add new orders.
3. Select the **Available Periods**. These are months where there are no orders submitted.
4. 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.



Builders and Distributors

The screenshot below shows the order form. **Builder List** and **Distributor List** buttons will show you tables for system recognized builder and distributor companies.

The screenshot shows the USMTO order form interface. At the top, there is a navigation bar with 'Master Lists', 'Orders', 'Reports', 'Profile', and 'Logout'. Below this is a header with the USMTO logo and 'US Manufacturing Technology Orders'. The main content area is titled 'Order Info' and includes a 'Help' and 'Back to List' button. The form fields are as follows:

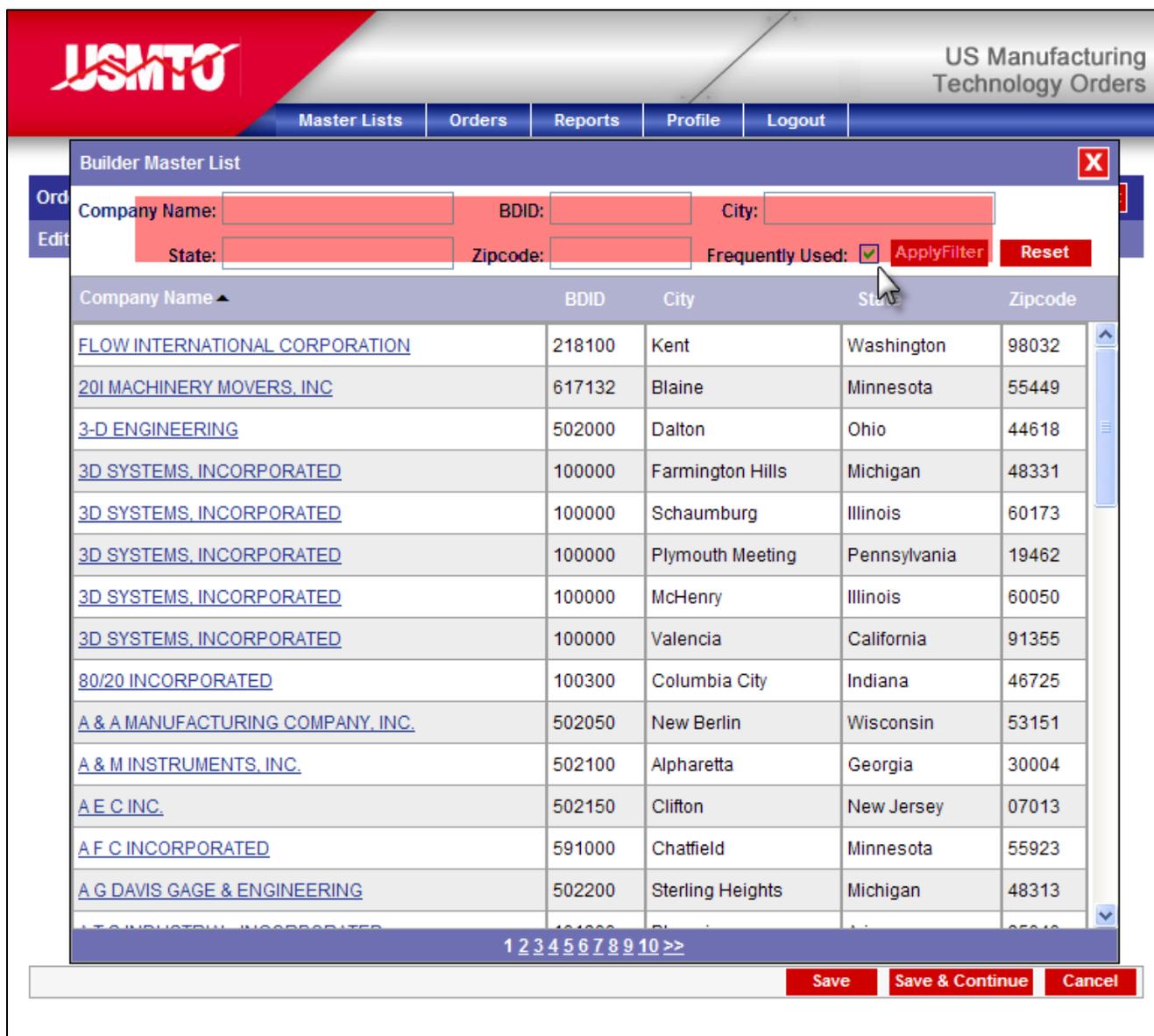
- Order Period: 4/2006
- * Builder BDID: 617249 (with a red callout box 'Builder List' and 'Add Builder' button)
- Builder Name: Objectware
- * Dist. BDID: Please Select (with a red callout box 'Distributor List' and 'Add Distributor' button)
- Dist. Name:
- * NAICS Code: (with a red callout box 'Customer List' and 'Industry Categories' button)
- Customer Country: UNITED STATES (dropdown)
- Customer Zipcode: (text input)
- Shipping Country: UNITED STATES (dropdown)
- Shipping Zipcode: (text input)
- * Machine Code: Please Select (with a red callout box 'Product List' button)
- * Units: (text input)
- * Total Sale: (text input)

At the bottom of the form, there are three buttons: 'Save', 'Save & Continue', and 'Cancel'.

Note: Your company's BDID will be filled in automatically in either the Distributor or Builder's field.

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.

*Tip: 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**.*



Builder Master List

Company Name: BDID: City:
 State: Zipcode: Frequently Used: **ApplyFilter** **Reset**

Company Name ▲	BDID	City	State	Zipcode
FLOW INTERNATIONAL CORPORATION	218100	Kent	Washington	98032
20I MACHINERY MOVERS, INC.	617132	Blaine	Minnesota	55449
3-D ENGINEERING	502000	Dalton	Ohio	44618
3D SYSTEMS, INCORPORATED	100000	Farmington Hills	Michigan	48331
3D SYSTEMS, INCORPORATED	100000	Schaumburg	Illinois	60173
3D SYSTEMS, INCORPORATED	100000	Plymouth Meeting	Pennsylvania	19462
3D SYSTEMS, INCORPORATED	100000	McHenry	Illinois	60050
3D SYSTEMS, INCORPORATED	100000	Valencia	California	91355
80/20 INCORPORATED	100300	Columbia City	Indiana	46725
A & A MANUFACTURING COMPANY, INC.	502050	New Berlin	Wisconsin	53151
A & M INSTRUMENTS, INC.	502100	Alpharetta	Georgia	30004
A E C INC.	502150	Clifton	New Jersey	07013
A F C INCORPORATED	591000	Chatfield	Minnesota	55923
A G DAVIS GAGE & ENGINEERING	502200	Sterling Heights	Michigan	48313

1 2 3 4 5 6 7 8 9 10 >>

Save **Save & Continue** **Cancel**

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. The following page allows you to fill out the company's information. This request is sent to Admin and is then evaluated by association staff for approval.

Order Info Help Back to List

Edit Order Detail

Order Period: 4/2006

* Builder BDID: 617249 Builder List Add Builder

Builder Name: Objectware Test

* Dist. BDID: Please Select Distributor List Add Distributor

Dist. Name:

* NAICS Code: Customer List Industry Categories

Customer Country: UNITED STATES

Customer Zipcode:

Shipping Country: UNITED STATES

Shipping Zipcode:

* Machine Code: Please Select Product List

* Units:

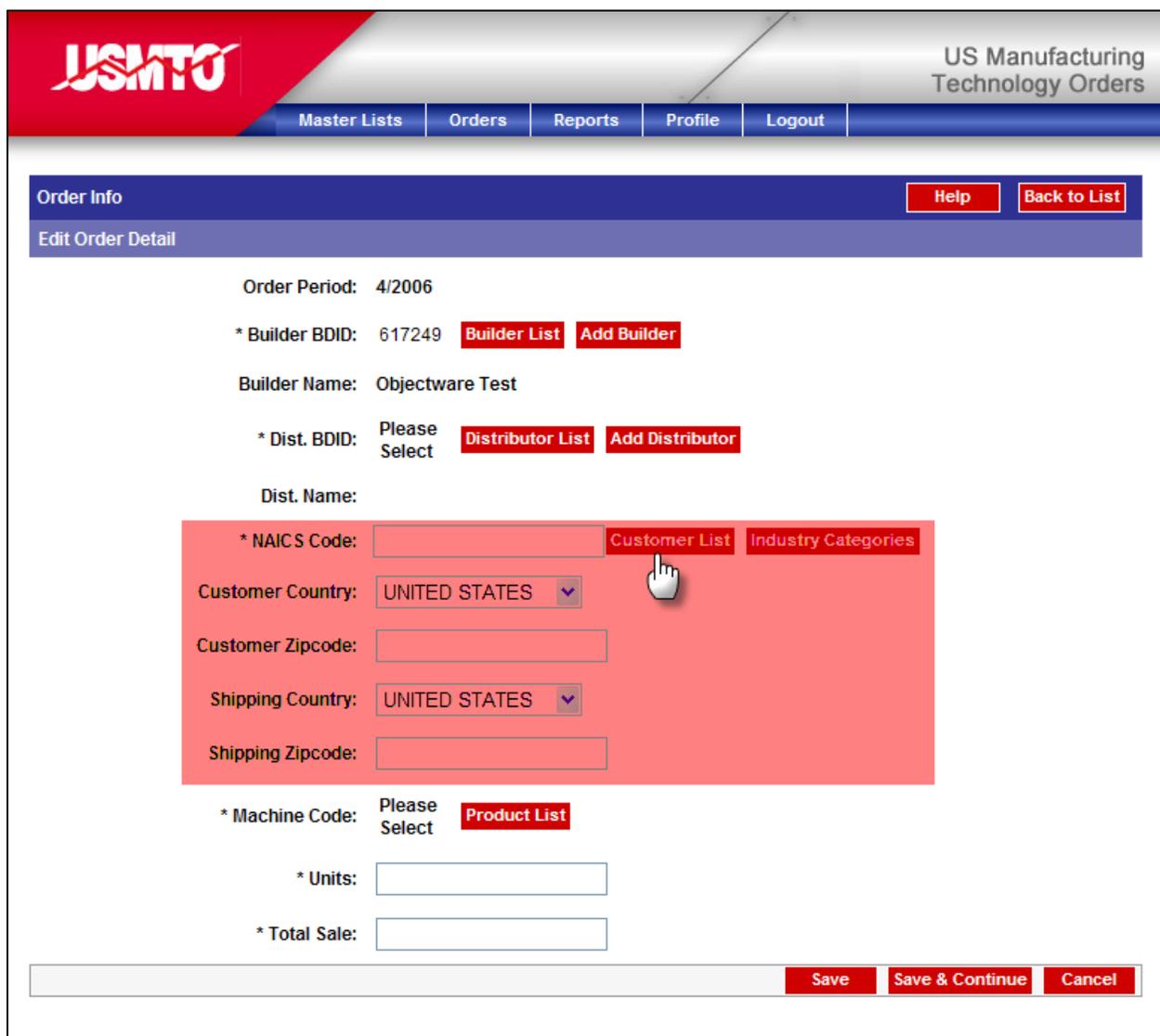
* Total Sale:

Save Save & Continue Cancel

Adding Customers

There are three ways you can enter customer industry information into the NAICS Code field.

- First, you can type the information directly into the field if you already know the 5 digit NAICS code and the customer’s billing and shipping zip codes.
- 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.
- 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.



The screenshot shows the 'Order Info' section of the USMTO web application. The page has a red header with the USMTO logo and a navigation bar with links for Master Lists, Orders, Reports, Profile, and Logout. The main content area is titled 'Order Info' and includes a 'Help' button and a 'Back to List' button. Below this is an 'Edit Order Detail' section with the following fields and buttons:

- Order Period: 4/2006
- * Builder BDID: 617249 **Builder List** **Add Builder**
- Builder Name: Objectware Test
- * Dist. BDID: Please Select **Distributor List** **Add Distributor**
- Dist. Name:
- * NAICS Code: **Customer List** **Industry Categories**
- Customer Country: UNITED STATES
- Customer Zipcode:
- Shipping Country: UNITED STATES
- Shipping Zipcode:
- * Machine Code: Please Select **Product List**
- * Units:
- * Total Sale:

At the bottom of the form are three buttons: **Save**, **Save & Continue**, and **Cancel**.



If you have selected a customer from the **Customer List**, the Customer Country and Customer Zip Code fields will auto-populate. The Shipping Country and Shipping Zip Code fields must be selected and entered for every order.

Tip: The **Customer Zip Code** represents where the order is being billed to, while the **Shipping Zip Code** is where the machine is actually being installed.

Customer Master List

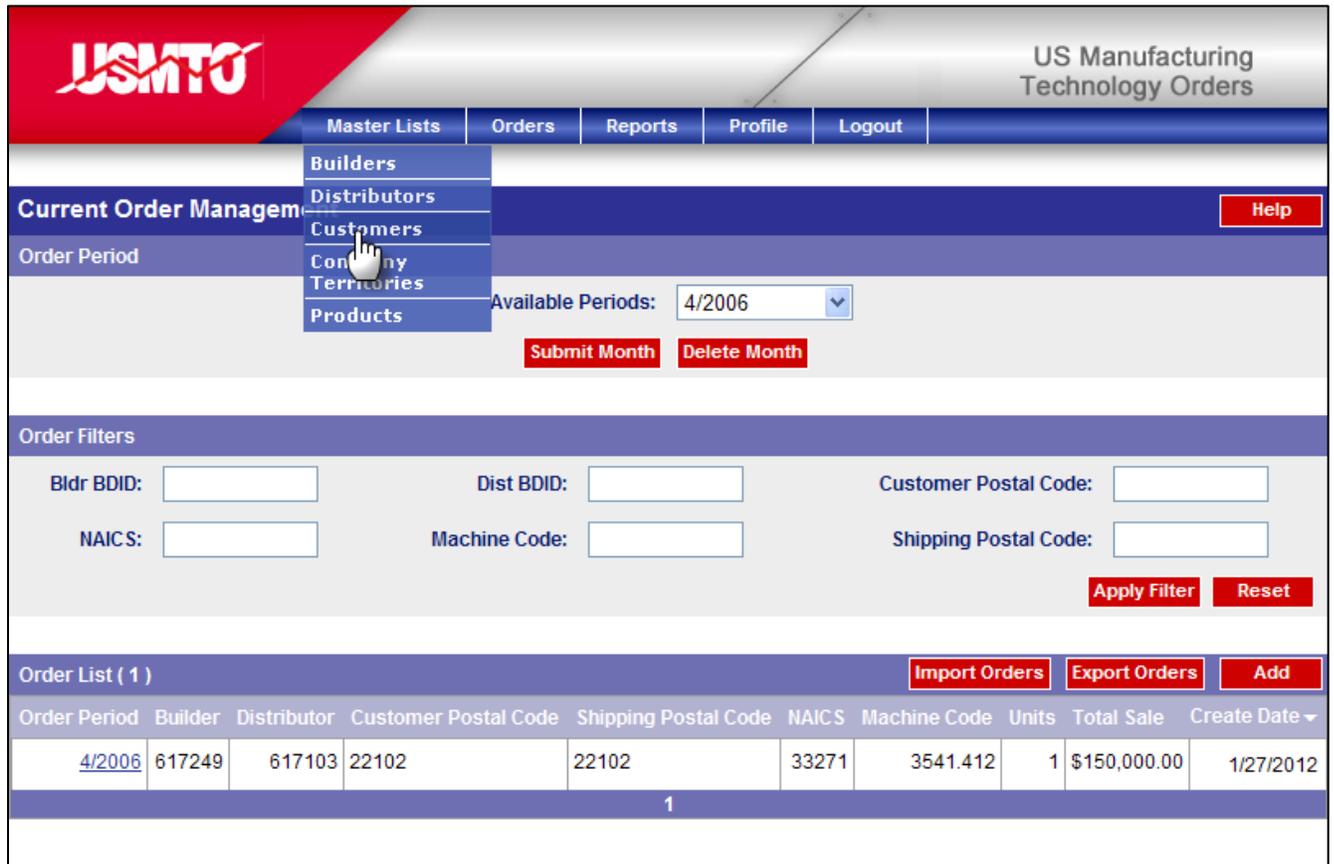
Customer Name: NAICS: Postal Code:
Desc: Apply Filter Reset

Customer Name	NAICS	Postal Code	Desc
(IPW) INFINITE PRECISION WORKS	32721	65338	Glass and Glass Product Manufacturing
1 PERCENT INSPIRATION GAMES	33993	21001	Doll, Toy, and Game Manufacturing
1 SOURCE PLASTICS LTD	32619	N8A 5E8	Other Plastics Product Manufacturing
1 STOP PRODUCTS	33639	50613	Other Motor Vehicle Parts Manufacturing
1 STOP SERVICES INC	33399	24153	All Other General Purpose Machinery Manufacturing
10-10 CORP	33995	28217	Sign Manufacturing
1090347 ONTARIO INC	33351	N3T 5M1	Metalworking Machinery, Primarily Mold and Special Tool & Die
113 DISTRICT OF COLUMBIA ANG	33641	20762	Aerospace Product and Parts Manufacturing
1212 BEAUDRY BLVD	32229	54016	Other Converted Paper Product Manufacturing
1274739 ONTARIO INC	32619	L4K 1L3	Other Plastics Product Manufacturing
13111 SCARBOROUGH INC	32619	53215	Other Plastics Product Manufacturing
1313 MOTORSPORTS	33631	41014	Motor Vehicle Gasoline Engine and Engine Parts Manufacturing
1314744 ONTARIO INC	33351	N7M 5J4	Metalworking Machinery, Primarily Mold and Special Tool &

1 2 3 4 5 6 7 8 9 10 >>

Save Save & Continue Cancel

If you'd like to add a customer that is not on the Master List, you can add it by hovering over **Master Lists** on the menu bar, selecting **Customers**, and clicking **Add** on the subsequent page.



The screenshot shows the USMTO web application interface. At the top, there is a navigation menu with 'Master Lists', 'Orders', 'Reports', 'Profile', and 'Logout'. The 'Master Lists' dropdown menu is open, showing options for 'Builders', 'Distributors', 'Customers', 'Company Territories', and 'Products'. A mouse cursor is hovering over 'Customers'. Below the menu, there is a 'Current Order Management' section with an 'Order Period' dropdown set to '4/2006' and buttons for 'Submit Month' and 'Delete Month'. There is also a 'Help' button. Below this is an 'Order Filters' section with input fields for 'Bldr BDID', 'Dist BDID', 'Customer Postal Code', 'NAICS', 'Machine Code', and 'Shipping Postal Code', along with 'Apply Filter' and 'Reset' buttons. At the bottom, there is an 'Order List (1)' section with buttons for 'Import Orders', 'Export Orders', and 'Add'. The table below shows one order entry for the period 4/2006.

Order Period	Builder	Distributor	Customer Postal Code	Shipping Postal Code	NAICS	Machine Code	Units	Total Sale	Create Date
4/2006	617249	617103	22102	22102	33271	3541.412	1	\$150,000.00	1/27/2012

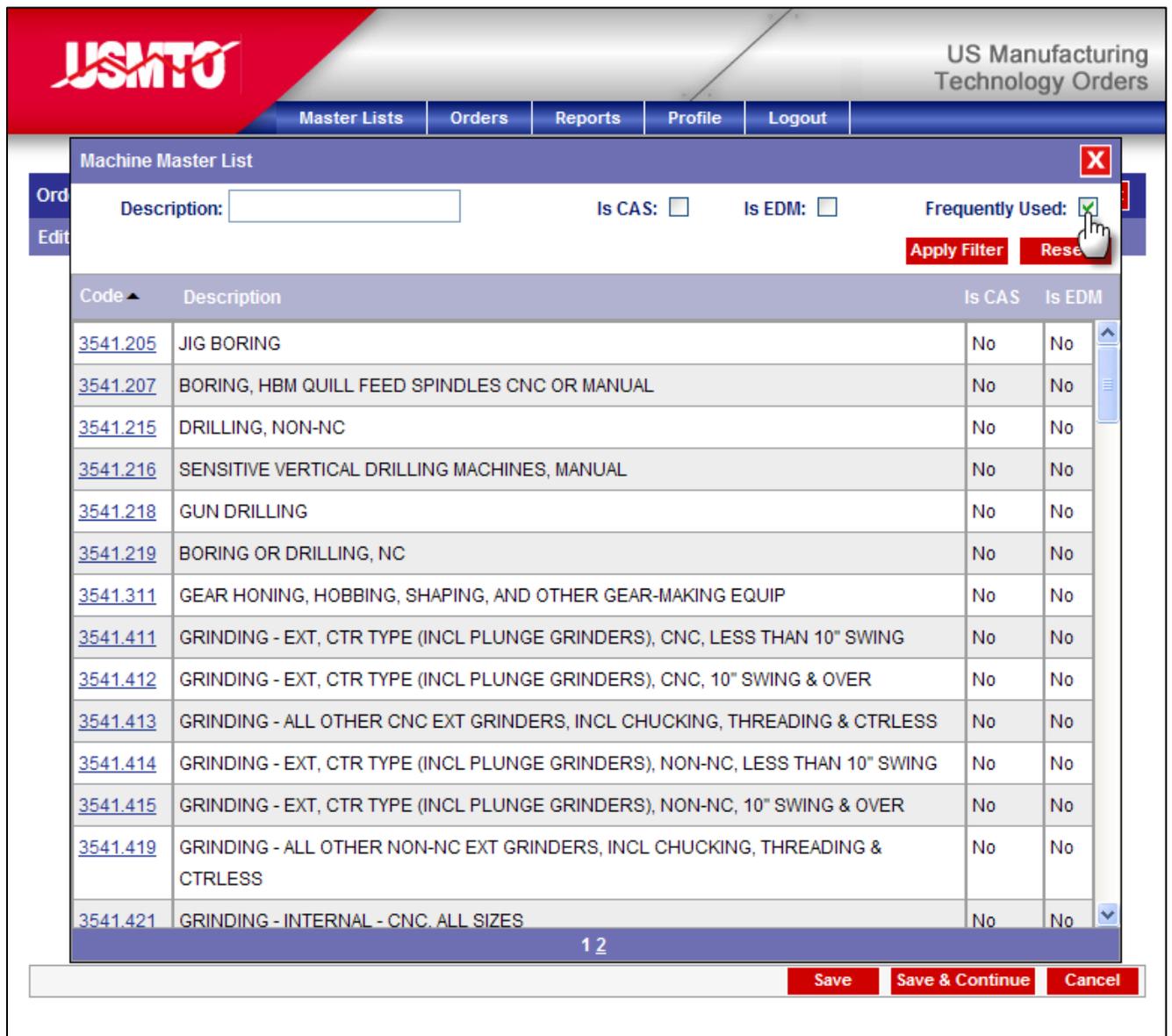
The next page will have fields for adding the customer's name, postal code, and NAICS code.

Note: The [North American Industry Classification System \(NAICS\)](#) code classifies a company according to its main industry or process (formerly classified by SIC code). USMTO uses the five-digit version of this number for its reports to tabulate end-user industries for manufacturing technology firms. Firms are self-classified – no official agency designates NAICS codes for companies. You can often find a company's NAICS code through online company databases such as [Manta](#).

Machine Codes

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.

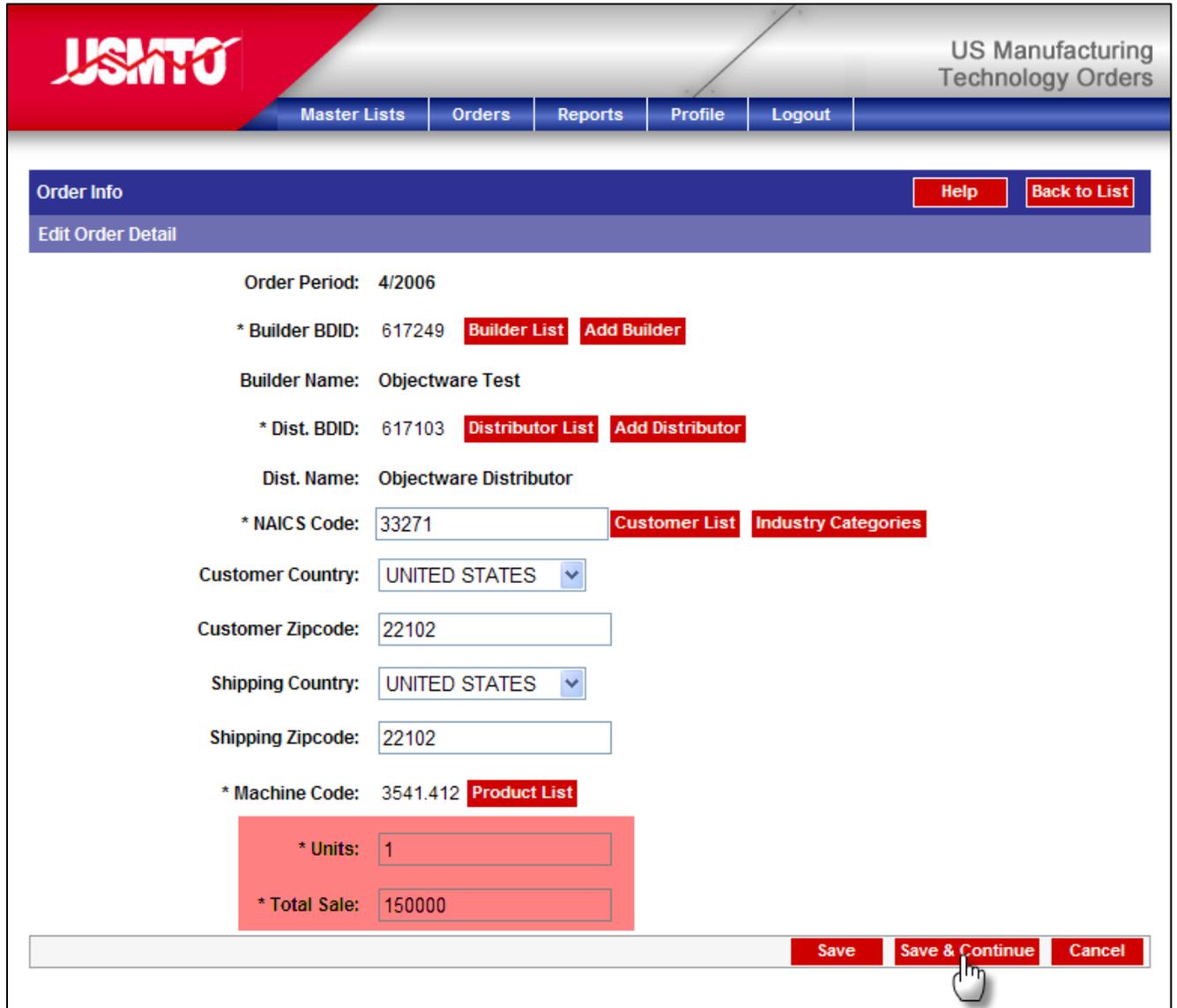
Note: If you are submitting a machining center order, a field will appear that asks you to select the axis capabilities of the machine. Please select either ≤ 4 or ≥ 5 .



The screenshot shows the 'Machine Master List' interface. At the top, there is a navigation bar with 'Master Lists', 'Orders', 'Reports', 'Profile', and 'Logout'. Below this is a search area with a 'Description' field, 'Is CAS' and 'Is EDM' checkboxes, and a 'Frequently Used' checkbox which is currently checked. There are 'Apply Filter' and 'Reset' buttons. The main area contains a table with columns for 'Code', 'Description', 'Is CAS', and 'Is EDM'. The table lists various machine codes and their descriptions, such as '3541.205 JIG BORING' and '3541.207 BORING, HBM QUILL FEED SPINDLES CNC OR MANUAL'. At the bottom of the table, there is a '12' indicating the total number of items. Below the table are 'Save', 'Save & Continue', and 'Cancel' buttons.

Code	Description	Is CAS	Is EDM
3541.205	JIG BORING	No	No
3541.207	BORING, HBM QUILL FEED SPINDLES CNC OR MANUAL	No	No
3541.215	DRILLING, NON-NC	No	No
3541.216	SENSITIVE VERTICAL DRILLING MACHINES, MANUAL	No	No
3541.218	GUN DRILLING	No	No
3541.219	BORING OR DRILLING, NC	No	No
3541.311	GEAR HONING, HOBGING, SHAPING, AND OTHER GEAR-MAKING EQUIP	No	No
3541.411	GRINDING - EXT, CTR TYPE (INCL PLUNGE GRINDERS), CNC, LESS THAN 10" SWING	No	No
3541.412	GRINDING - EXT, CTR TYPE (INCL PLUNGE GRINDERS), CNC, 10" SWING & OVER	No	No
3541.413	GRINDING - ALL OTHER CNC EXT GRINDERS, INCL CHUCKING, THREADING & CTRLESS	No	No
3541.414	GRINDING - EXT, CTR TYPE (INCL PLUNGE GRINDERS), NON-NC, LESS THAN 10" SWING	No	No
3541.415	GRINDING - EXT, CTR TYPE (INCL PLUNGE GRINDERS), NON-NC, 10" SWING & OVER	No	No
3541.419	GRINDING - ALL OTHER NON-NC EXT GRINDERS, INCL CHUCKING, THREADING & CTRLESS	No	No
3541.421	GRINDING - INTERNAL - CNC. ALL SIZES	No	No

Type in the value of the order in the **Total Sale** field. **Note:** No dollar signs or commas, please!



USMTO

US Manufacturing Technology Orders

Master Lists | Orders | Reports | Profile | Logout

Order Info Help Back to List

Edit Order Detail

Order Period: 4/2006

* Builder BDID: 617249 Builder List Add Builder

Builder Name: Objectware Test

* Dist. BDID: 617103 Distributor List Add Distributor

Dist. Name: Objectware Distributor

* NAICS Code: 33271 Customer List Industry Categories

Customer Country: UNITED STATES

Customer Zipcode: 22102

Shipping Country: UNITED STATES

Shipping Zipcode: 22102

* Machine Code: 3541.412 Product List

* Units: 1

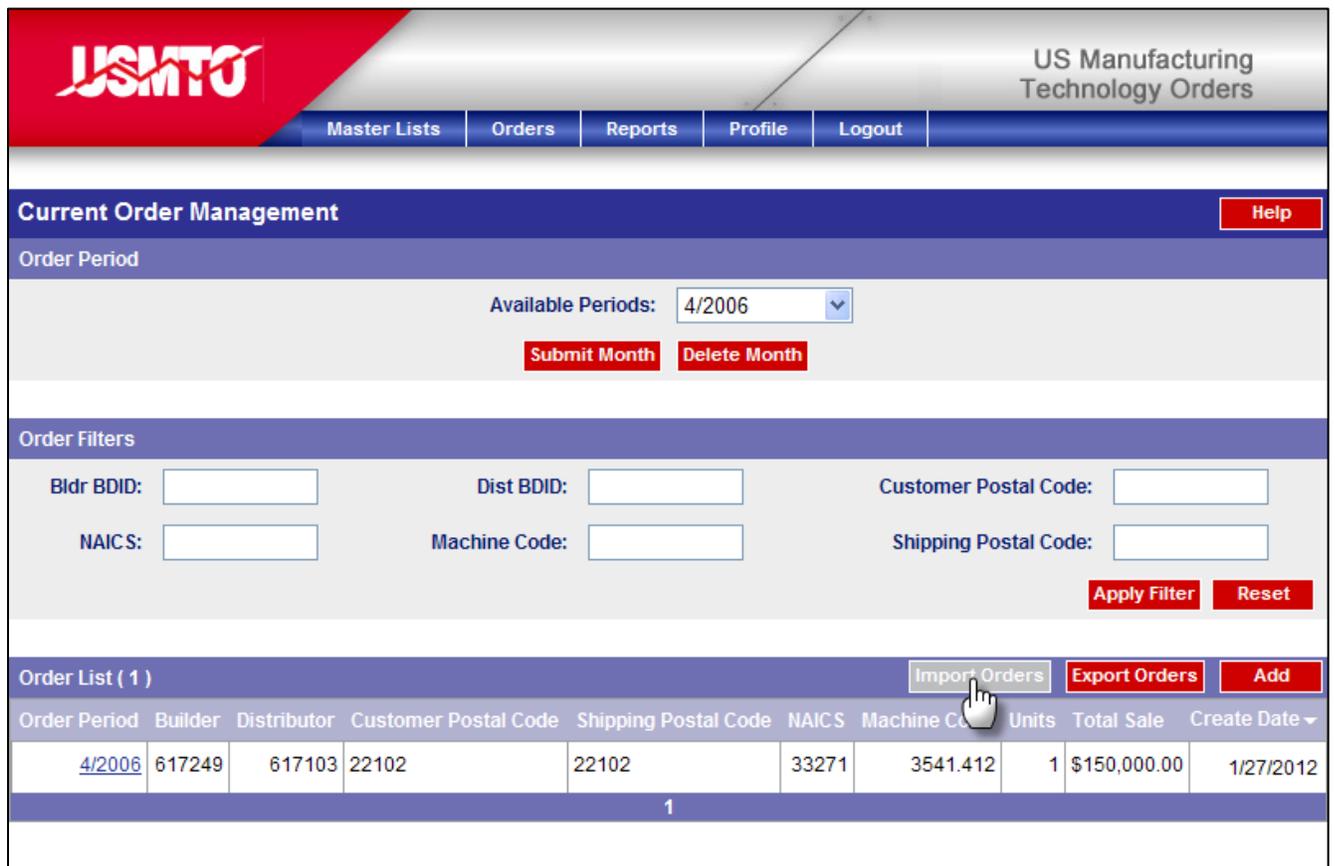
* Total Sale: 150000

Save Save & Continue Cancel

Click **Save & Continue** to enter a new order OR Click **Save** to return to the **Current Order Management Page**.

Importing Orders

To add orders in bulk, click on the **Import Orders** button in the **Current Orders Management** screen.



Current Order Management Help

Order Period

Available Periods: 4/2006

Order Filters

Bldr BDID: Dist BDID: Customer Postal Code:
 NAICS: Machine Code: Shipping Postal Code:

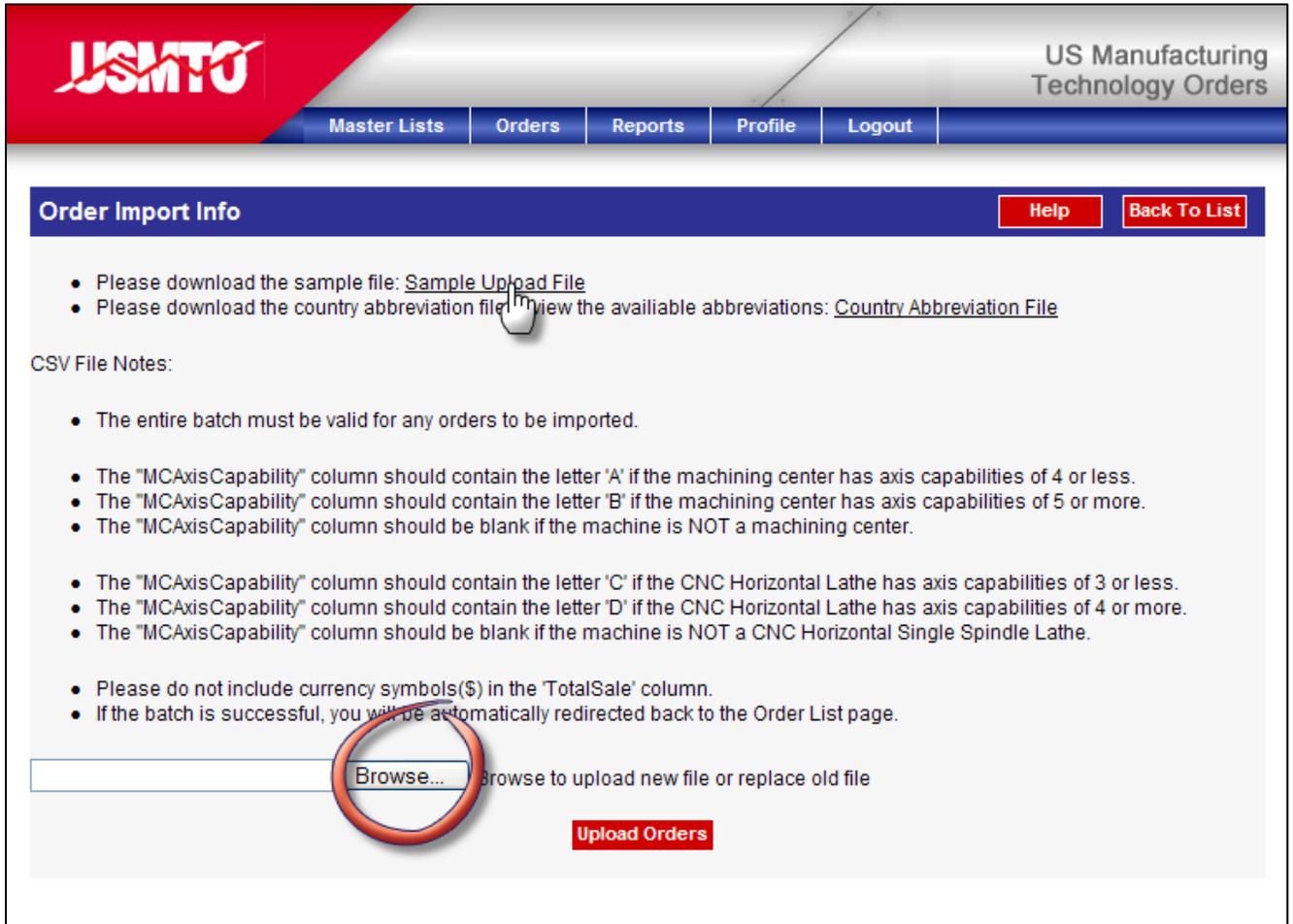
Order List (1)

Order Period	Builder	Distributor	Customer Postal Code	Shipping Postal Code	NAICS	Machine Code	Units	Total Sale	Create Date
4/2006	617249	617103	22102	22102	33271	3541.412	1	\$150,000.00	1/27/2012

1

Note: Importing bulk orders into USMTO via spreadsheet can be particularly handy when your orders are being pulled from your own database.

In the next screen (below) you'll have the option to upload your orders via CSV file. Click **Sample Upload File** to download the CSV template used to upload orders.



Order Import Info Help Back To List

- Please download the sample file: [Sample Upload File](#)
- Please download the country abbreviation file. View the available abbreviations: [Country Abbreviation File](#)

CSV File Notes:

- The entire batch must be valid for any orders to be imported.
- The "MCAxisCapability" column should contain the letter 'A' if the machining center has axis capabilities of 4 or less.
- The "MCAxisCapability" column should contain the letter 'B' if the machining center has axis capabilities of 5 or more.
- The "MCAxisCapability" column should be blank if the machine is NOT a machining center.
- The "MCAxisCapability" column should contain the letter 'C' if the CNC Horizontal Lathe has axis capabilities of 3 or less.
- The "MCAxisCapability" column should contain the letter 'D' if the CNC Horizontal Lathe has axis capabilities of 4 or more.
- The "MCAxisCapability" column should be blank if the machine is NOT a CNC Horizontal Single Spindle Lathe.
- Please do not include currency symbols(\$) in the 'TotalSale' column.
- If the batch is successful, you will be automatically redirected back to the Order List page.

Browse to upload new file or replace old file

Upload Orders

Important Note: CSV files must be formatted precisely in order to be read by USMTO – the program will not accept the file if formatted incorrectly. Make sure the headers are spelled correctly (the same ones used in the **Sample Upload File**) and that all zip codes and NAICS codes are valid.



Fill out the downloaded form (pictured below). Instructions on how to indicate the axis capability of either a machining center or CNC horizontal lathe can be found on the **Import Orders** landing page. (**Important:** Make sure you leave this field blank if your order is neither a horizontal lathe nor machining center. Doing otherwise will result in an upload error.)

Once you've finished, save the file as CSV and upload it by clicking the **Browse** button and selecting your saved file. The browser will direct you back to the **Current Order Management** page if uploaded successfully.

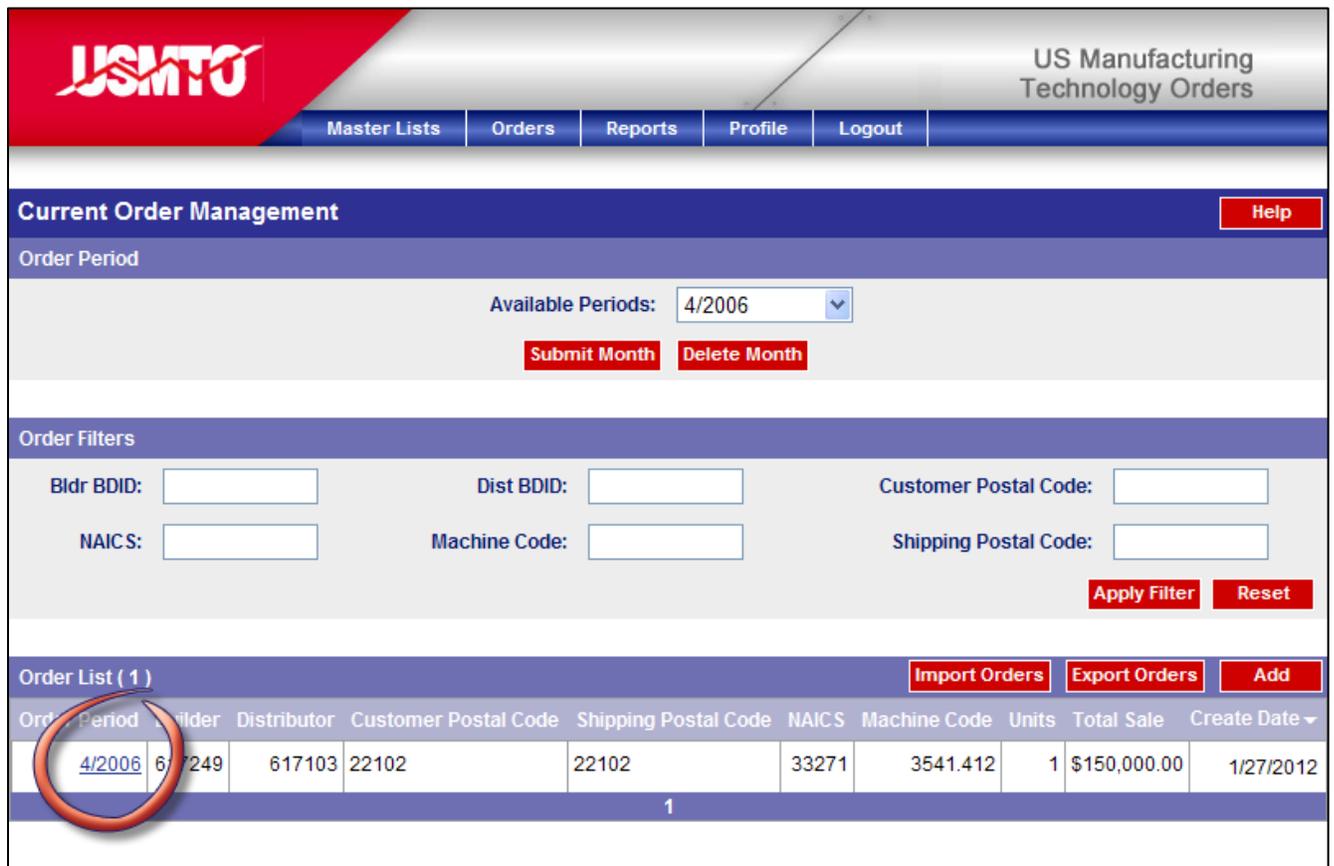
	A	B	C	D	E	F	G	H	I	J	K	L
	BuilderBDID	DistributorBDID	NAICSCode	MachineCode	MCAXisCapability	CustomerCountryAbbrev	CustomerPostalCode	ShippingCountryAbbrev	ShippingPostalCode	Units	TotalSale	
2	111111	111112	11111	1111.111 A		USA	30062	USA	30062	2	100	
3	111111	111112	11112	1111.112 B		USA	30092	USA	30067	5	489.75	
4	111111	111112	11112	1111.113		USA	91352	CAN	G0M 1Y0	10	1000	
5												
6												
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20												

Important Note: Beware of dropped zeros! When formatting, make sure that postal codes are in their five-digit format and that no leading zeros have been eliminated (for instance, Excel will often drop the leading zero in codes like 06255 if the column isn't specifically formatted to handle zip codes). Likewise Excel will drop trailing zeros from machine codes that have them (like 3542.500) unless the column is formatted to display three decimal places.

Tip to ensure a successful upload: Save the CSV file then exit Excel. Then reopen the CSV file in Notepad. This will display orders in comma delineated format. Make any edits you need then save the file. The CSV file will retain all formatting from your last save, enabling you to upload the document without dropping those pesky zeros.

Editing and Deleting Orders

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. 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.



US Manufacturing Technology Orders

Master Lists | Orders | Reports | Profile | Logout

Current Order Management Help

Order Period

Available Periods: 4/2006

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

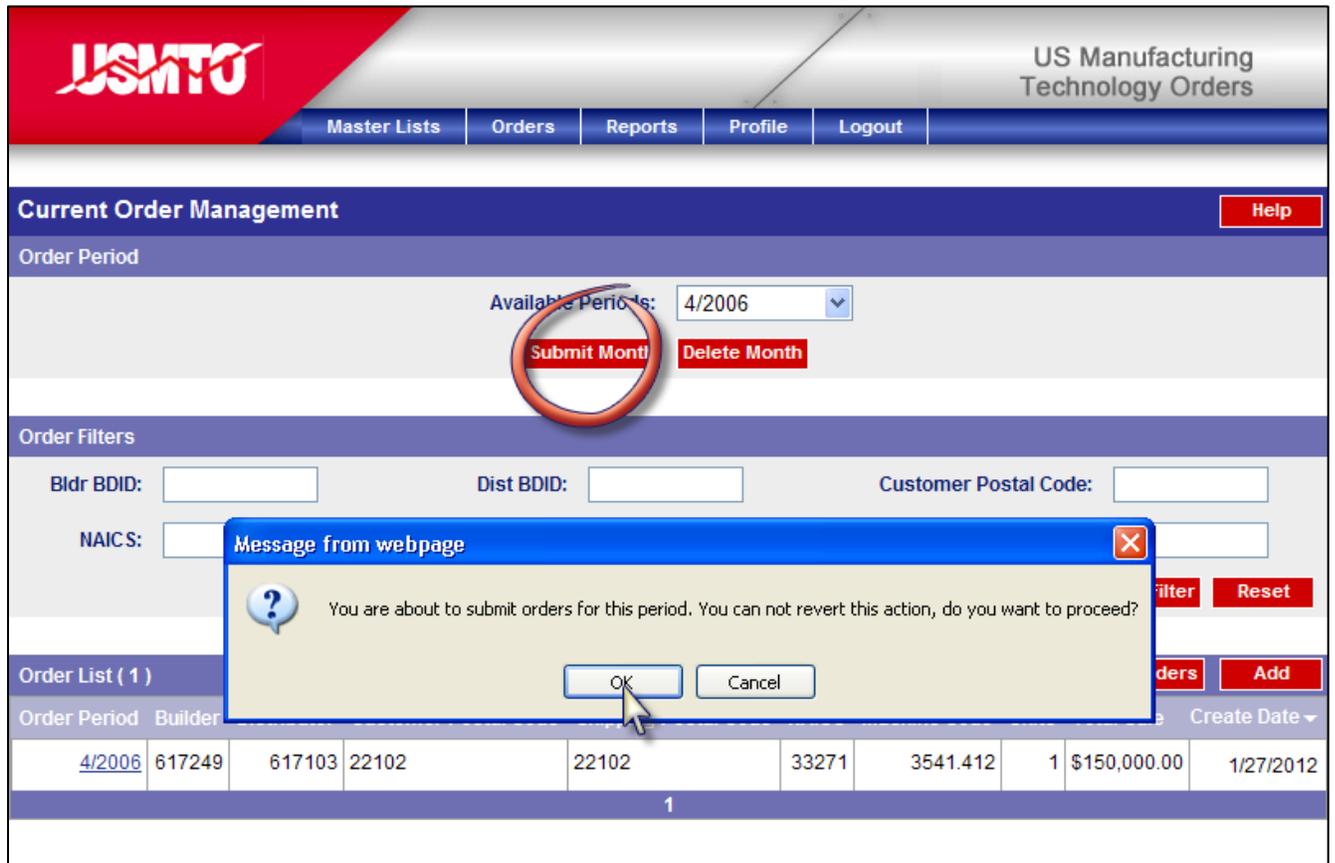
Order Period	Bldr	Distributor	Customer Postal Code	Shipping Postal Code	NAICS	Machine Code	Units	Total Sale	Create Date
4/2006	617249	617103	22102	22102	33271	3541.412	1	\$150,000.00	1/27/2012

1

Note: 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.

Submitting Orders for Processing

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”



USMTO US Manufacturing Technology Orders

Master Lists Orders Reports Profile Logout

Current Order Management Help

Order Period

Available Periods: 4/2006

Submit Month Delete Month

Order Filters

Bldr BDID: Dist BDID: Customer Postal Code: NAICS:

Message from webpage

You are about to submit orders for this period. You can not revert this action, do you want to proceed?

OK Cancel

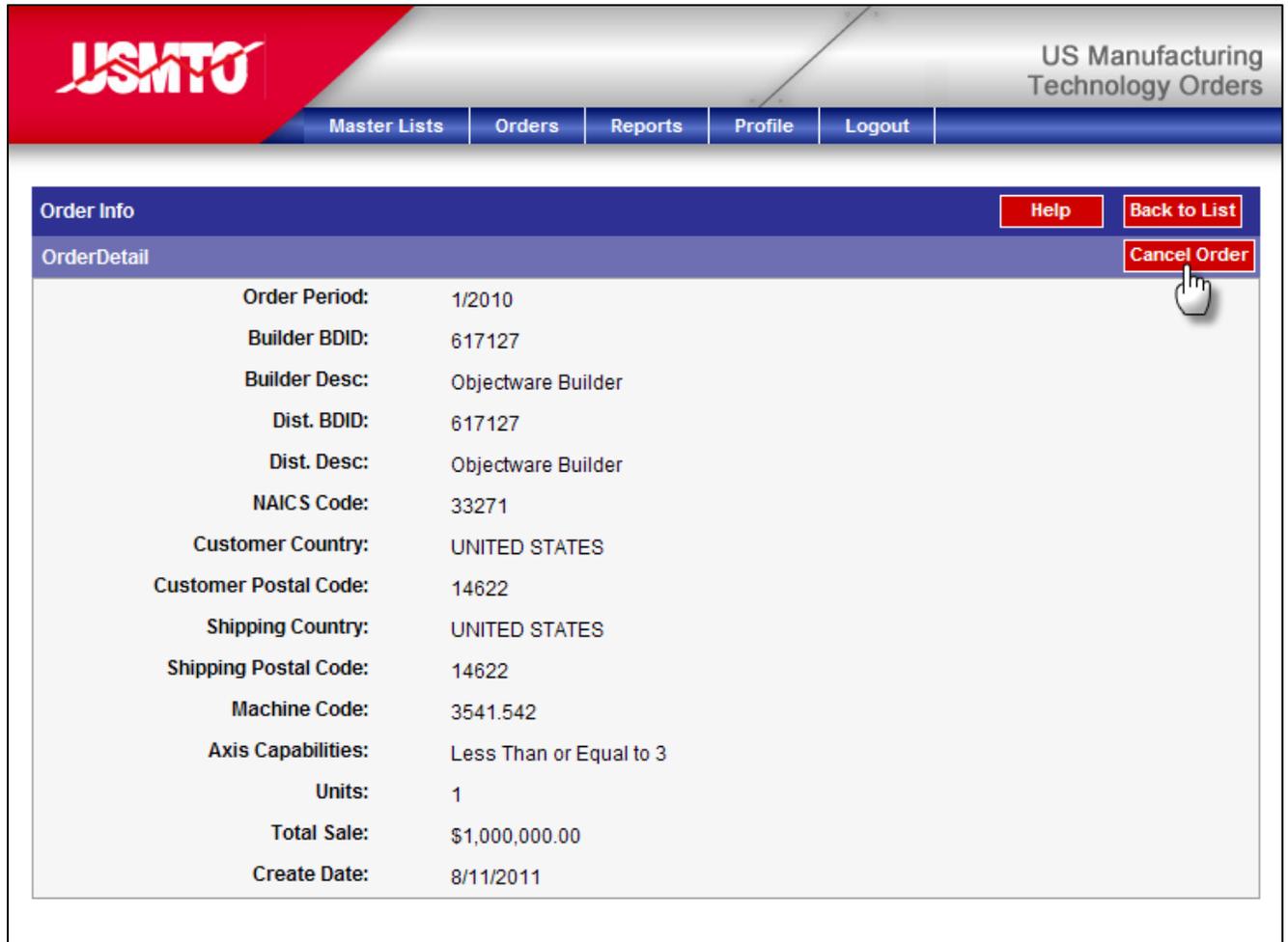
Order List (1)

Order Period	Builder								Create Date
4/2006	617249	617103	22102	22102	33271	3541.412	1	\$150,000.00	1/27/2012

1

Entering Order Cancellations

1. Hover over **Orders** on the main menu bar.
2. Click **Archived Data** (Takes you to Archived Order Management).
3. Select the period of which the order you want to cancel was entered using the Available Periods drop down.
4. Click the blue underlined date link (“m/yyyy”) to the left of the order you would like to cancel.
5. Next screen click **Edit**.
6. Next screen click the **Cancel Order** button in the top right hand corner.
7. You will be sent back the Archived Order Management screen and the order you have cancelled will be highlighted red.



The screenshot shows the USMTO web application interface. At the top left is the USMTO logo. At the top right is the text "US Manufacturing Technology Orders". Below this is a navigation bar with buttons for "Master Lists", "Orders", "Reports", "Profile", and "Logout". The main content area is titled "Order Info" and "OrderDetail". In the top right corner of the "OrderDetail" section, there are three buttons: "Help", "Back to List", and "Cancel Order". A mouse cursor is pointing at the "Cancel Order" button. The order details are as follows:

Order Period:	1/2010
Builder BDID:	617127
Builder Desc:	Objectware Builder
Dist. BDID:	617127
Dist. Desc:	Objectware Builder
NAICS Code:	33271
Customer Country:	UNITED STATES
Customer Postal Code:	14622
Shipping Country:	UNITED STATES
Shipping Postal Code:	14622
Machine Code:	3541.542
Axis Capabilities:	Less Than or Equal to 3
Units:	1
Total Sale:	\$1,000,000.00
Create Date:	8/11/2011

Defining Territories

Territories allow you to zero in on market conditions within the geographic boundaries you define. They may be as small as two zip codes or as large as multiple states.

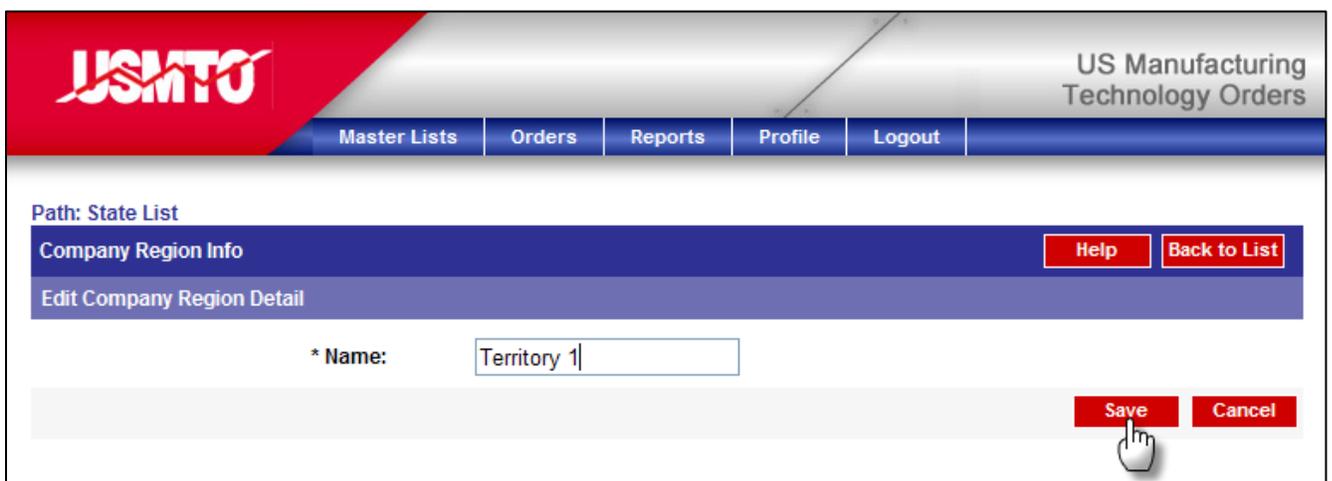
Note: Territories cannot “overlap” – meaning, territories cannot share any zip codes between them. This helps preclude the possibility of any participant being able to judge your market share by isolating sales to a very specific location. The same logic prevents participants from being able to create a territory consisting of only one zip code.

Creating New Territories

1. Click **Master Lists** on the main menu bar.
2. Click **Company Territories**.
3. To add a new territory to your list click **Add**.

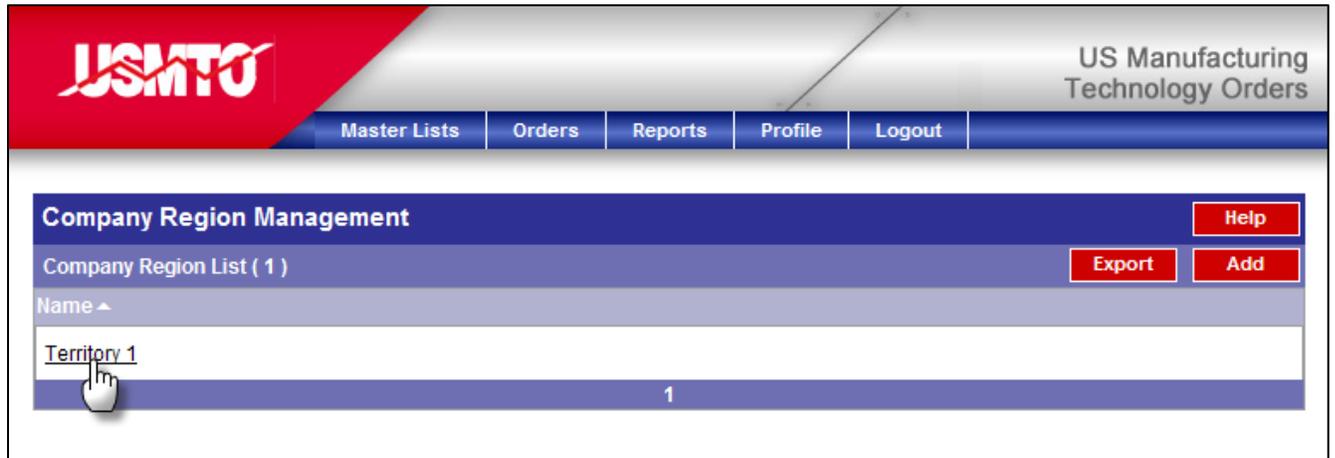


4. Type a name and click **Save**. Click **Back to List** to return to the main menu.

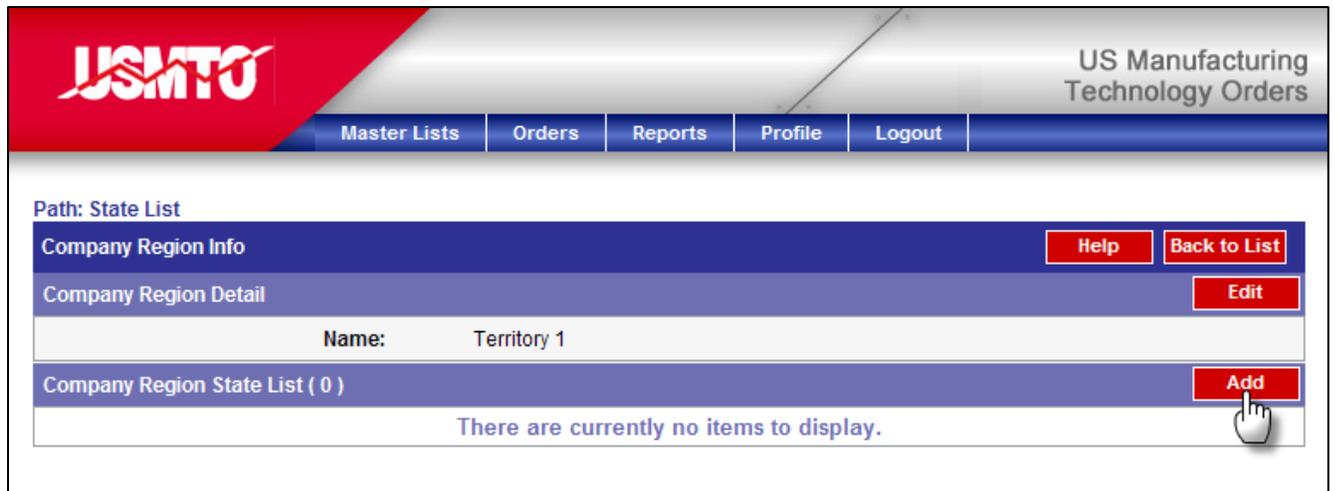


Setting up the Geography

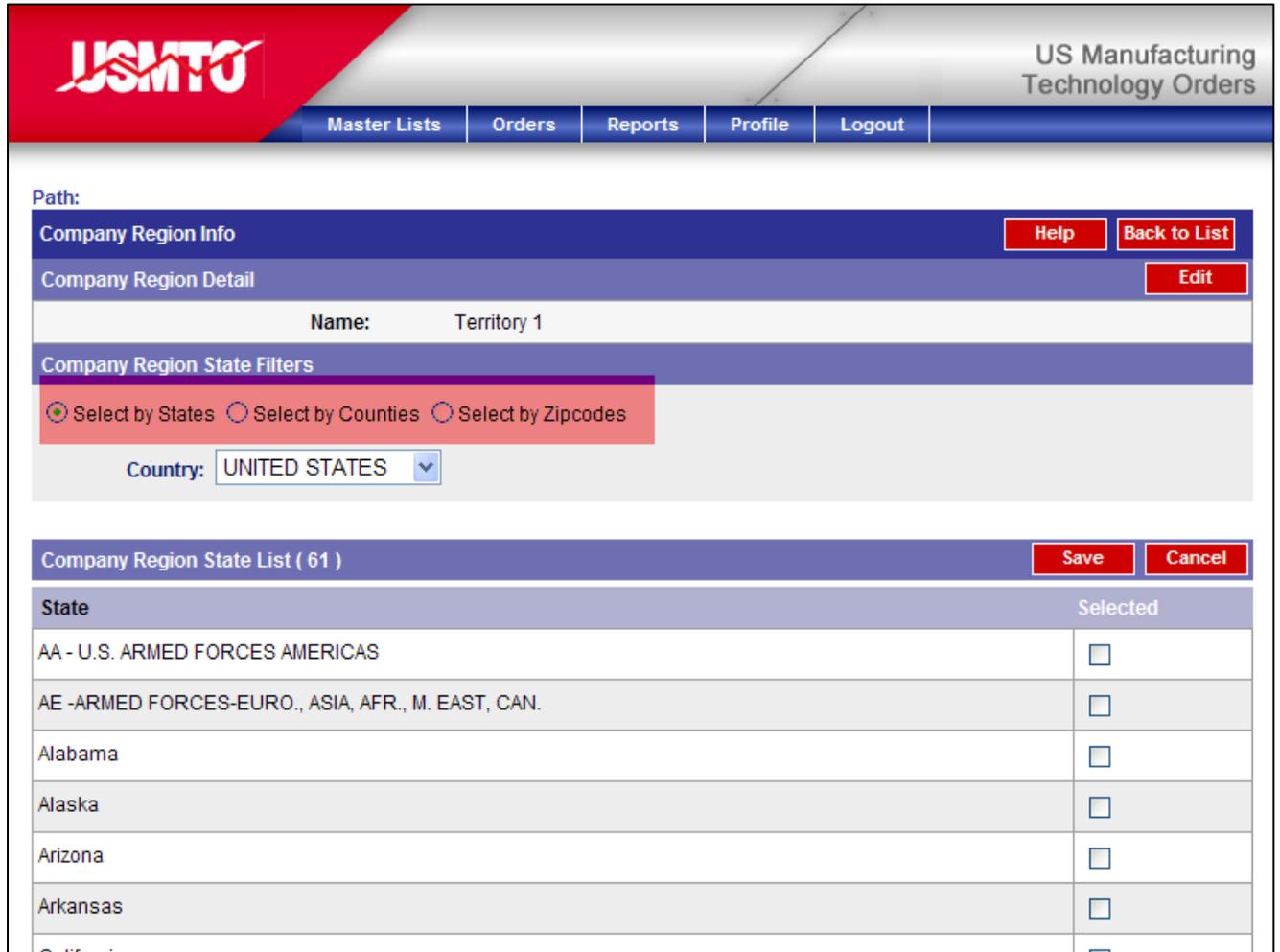
To start, click the underlined territory name.



Click **Add** to add territory definitions.



From here you can add territory definitions at the state, county, or zip-code level.



The screenshot shows the USMTO web application interface. At the top, there is a navigation bar with the USMTO logo on the left and the text 'US Manufacturing Technology Orders' on the right. Below the navigation bar are several menu items: 'Master Lists', 'Orders', 'Reports', 'Profile', and 'Logout'. The main content area is titled 'Path:' and shows a breadcrumb trail: 'Company Region Info' > 'Company Region Detail'. There are 'Help' and 'Back to List' buttons next to 'Company Region Info', and an 'Edit' button next to 'Company Region Detail'. The 'Name:' field is set to 'Territory 1'. Below this is the 'Company Region State Filters' section, which has three radio buttons: 'Select by States' (selected), 'Select by Counties', and 'Select by Zipcodes'. A 'Country:' dropdown menu is set to 'UNITED STATES'. Below the filters is the 'Company Region State List (61)' section, which has 'Save' and 'Cancel' buttons. The list table has two columns: 'State' and 'Selected'. The rows in the table are:

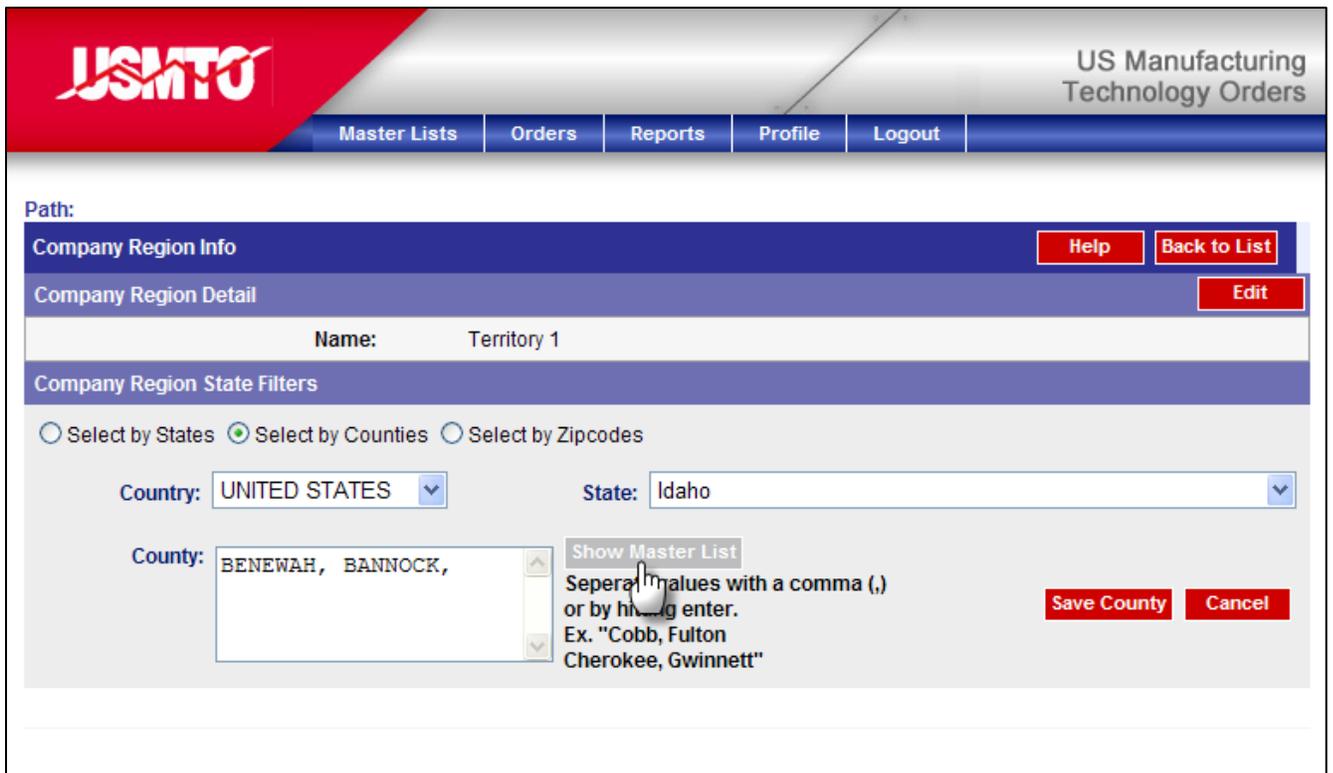
State	Selected
AA - U.S. ARMED FORCES AMERICAS	<input type="checkbox"/>
AE -ARMED FORCES-EURO., ASIA, AFR., M. EAST, CAN.	<input type="checkbox"/>
Alabama	<input type="checkbox"/>
Alaska	<input type="checkbox"/>
Arizona	<input type="checkbox"/>
Arkansas	<input type="checkbox"/>
California	<input type="checkbox"/>

To add a **whole state** to your territory definition, click the **Select by States** radio button (as shown above).

1. Select the country from the drop down menu.
2. Check the boxes next to the states you would like to add and click **Save**.

To add a **whole county** to your territory definition, click the **Select by Counties** radio button.

1. Select a country and a state from the drop down menus.
2. Then either type in the name of the county into the box provided or click the **Show Master List** button to find and select counties for the state selected.
3. Then click **Save County** when you are ready to save the counties to your territory definition.



USMTO US Manufacturing Technology Orders

Master Lists | Orders | Reports | Profile | Logout

Path:
Company Region Info [Help](#) [Back to List](#)
Company Region Detail [Edit](#)

Name: Territory 1

Company Region State Filters

Select by States Select by Counties Select by Zipcodes

Country: UNITED STATES State: Idaho

County: BENEWAH, BANNOCK, [Show Master List](#)

Separate values with a comma (,) or by hitting enter.
Ex. "Cobb, Fulton Cherokee, Gwinnett"

[Save County](#) [Cancel](#)

To add a **series of zip codes** to your territory definition click the **Select by Zipcodes** radio button.

1. Select the country and the state from the drop down menus.
2. Then type the zip-codes you wish to use into the box or copy and paste the zip-codes from an external source to add definition to your territory.
3. Click **Save Zipcode** to save the entered zip-codes and return to your territory screen.



USMTO

US Manufacturing Technology Orders

Master Lists | Orders | Reports | Profile | Logout

Path:

Company Region Info Help Back to List

Company Region Detail Edit

Name: Territory 1

Company Region State Filters

Select by States
 Select by Counties
 Select by Zipcodes

Country: UNITED STATES State: Montana

Zipcode: 59103, 59104, 59105, 59106

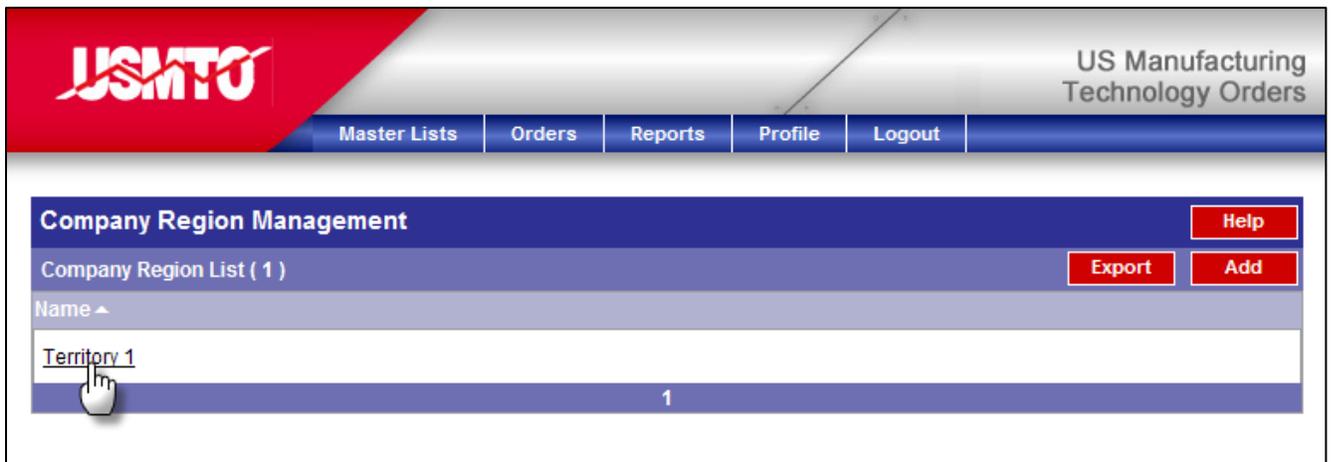
Seperate values with a comma (,) or by hitting enter. Ex. "65802, 65804 65401, 65409"

Save Zipcode Cancel

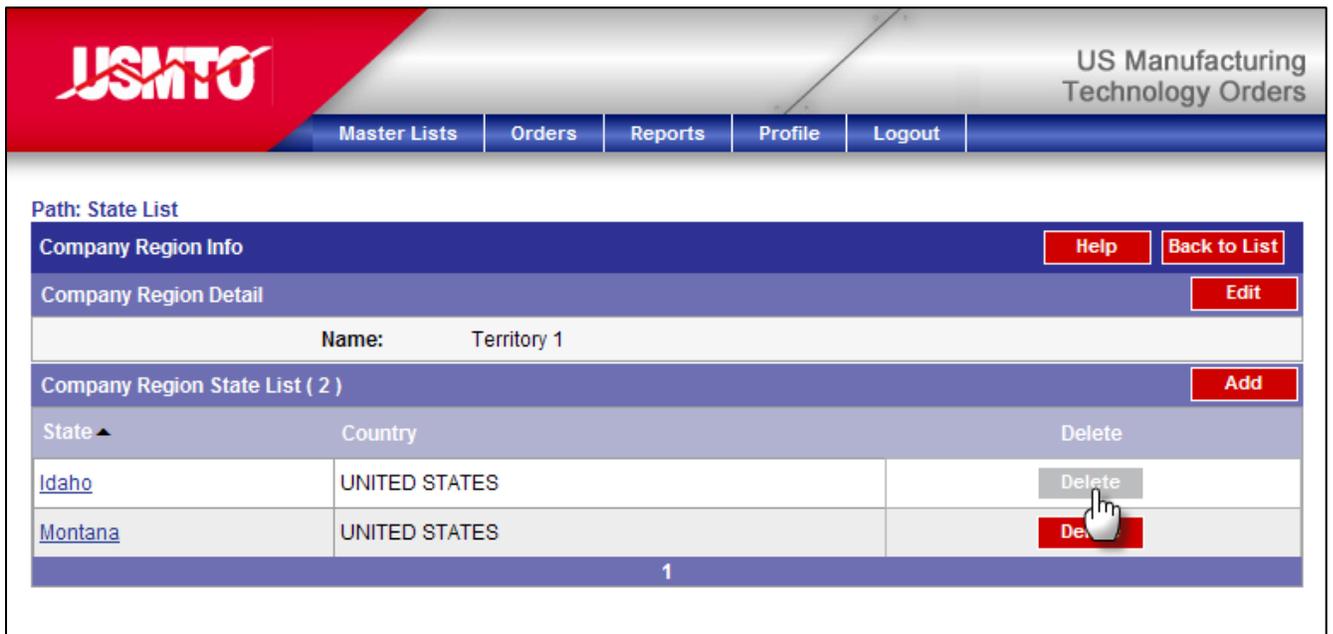
Modify an Existing Territory

You can modify your territories by adding or deleting on the state, county or zip-code level. **To add**, merely follow the steps outlined above for defining your territory geography.

To delete aspects of your territory, start by clicking on the territory you wish to modify.



You can delete the entire state by clicking **Delete** to the right.



To modify your territory on the county level, click the underlined state link to drill down and view the counties used to define the territory within the state chosen. Click the **Delete** button to remove any county from the territory definition.



USMTO

US Manufacturing Technology Orders

Master Lists Orders Reports Profile Logout

Path: County List

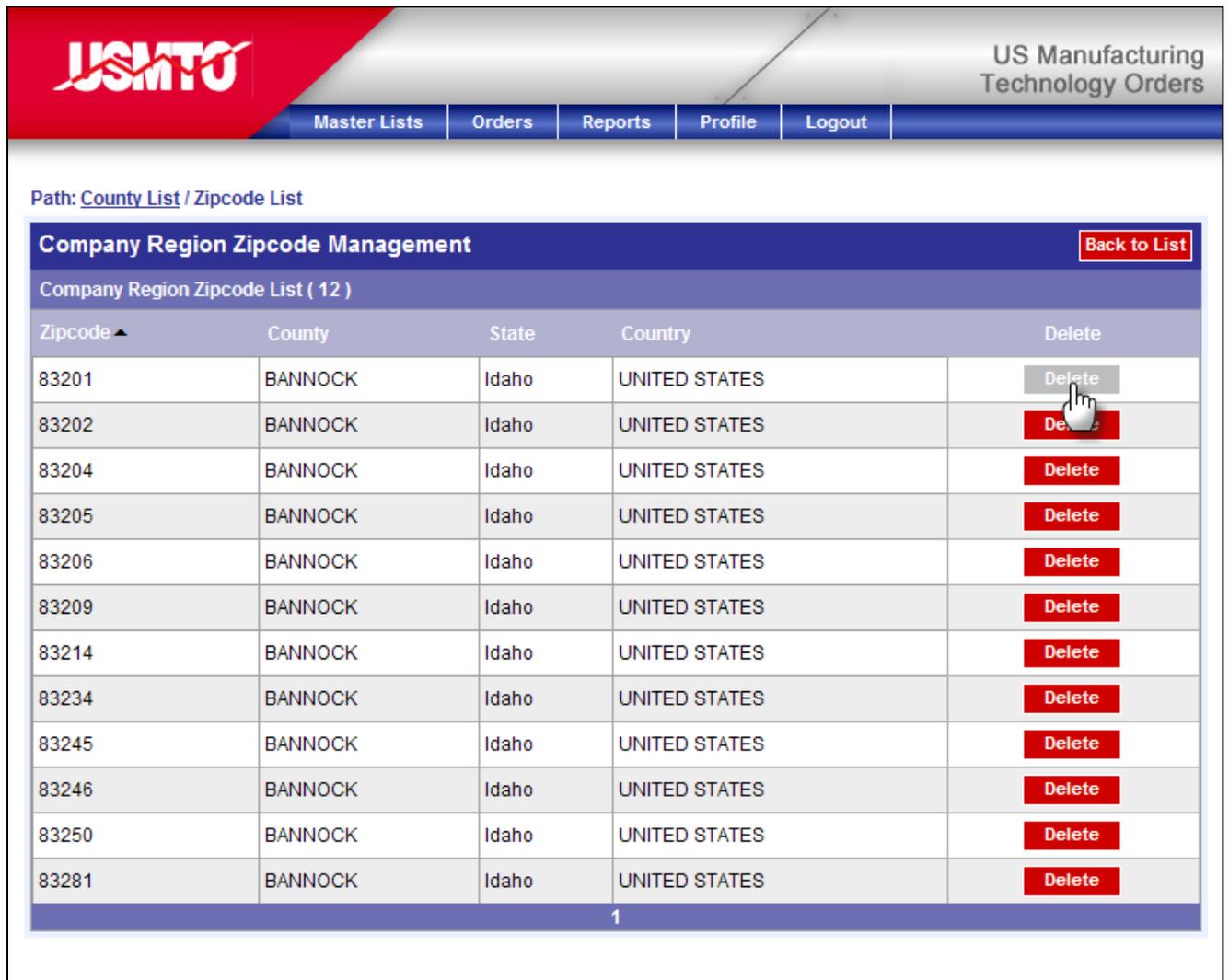
Company Region County Management [Back to List](#)

Distributor Region County List (2)

County ▲	State	Country	Delete
BANNOCK	Idaho	UNITED STATES	Delete
BENEWAH	Idaho	UNITED STATES	Delete

1

Click the underlined county link to drill down and view the zip codes used to define the territory within the county chosen.



Path: [County List](#) / Zipcode List

Company Region Zipcode Management [Back to List](#)

Company Region Zipcode List (12)

Zipcode ▲	County	State	Country	Delete
83201	BANNOCK	Idaho	UNITED STATES	Delete
83202	BANNOCK	Idaho	UNITED STATES	Delete
83204	BANNOCK	Idaho	UNITED STATES	Delete
83205	BANNOCK	Idaho	UNITED STATES	Delete
83206	BANNOCK	Idaho	UNITED STATES	Delete
83209	BANNOCK	Idaho	UNITED STATES	Delete
83214	BANNOCK	Idaho	UNITED STATES	Delete
83234	BANNOCK	Idaho	UNITED STATES	Delete
83245	BANNOCK	Idaho	UNITED STATES	Delete
83246	BANNOCK	Idaho	UNITED STATES	Delete
83250	BANNOCK	Idaho	UNITED STATES	Delete
83281	BANNOCK	Idaho	UNITED STATES	Delete

1

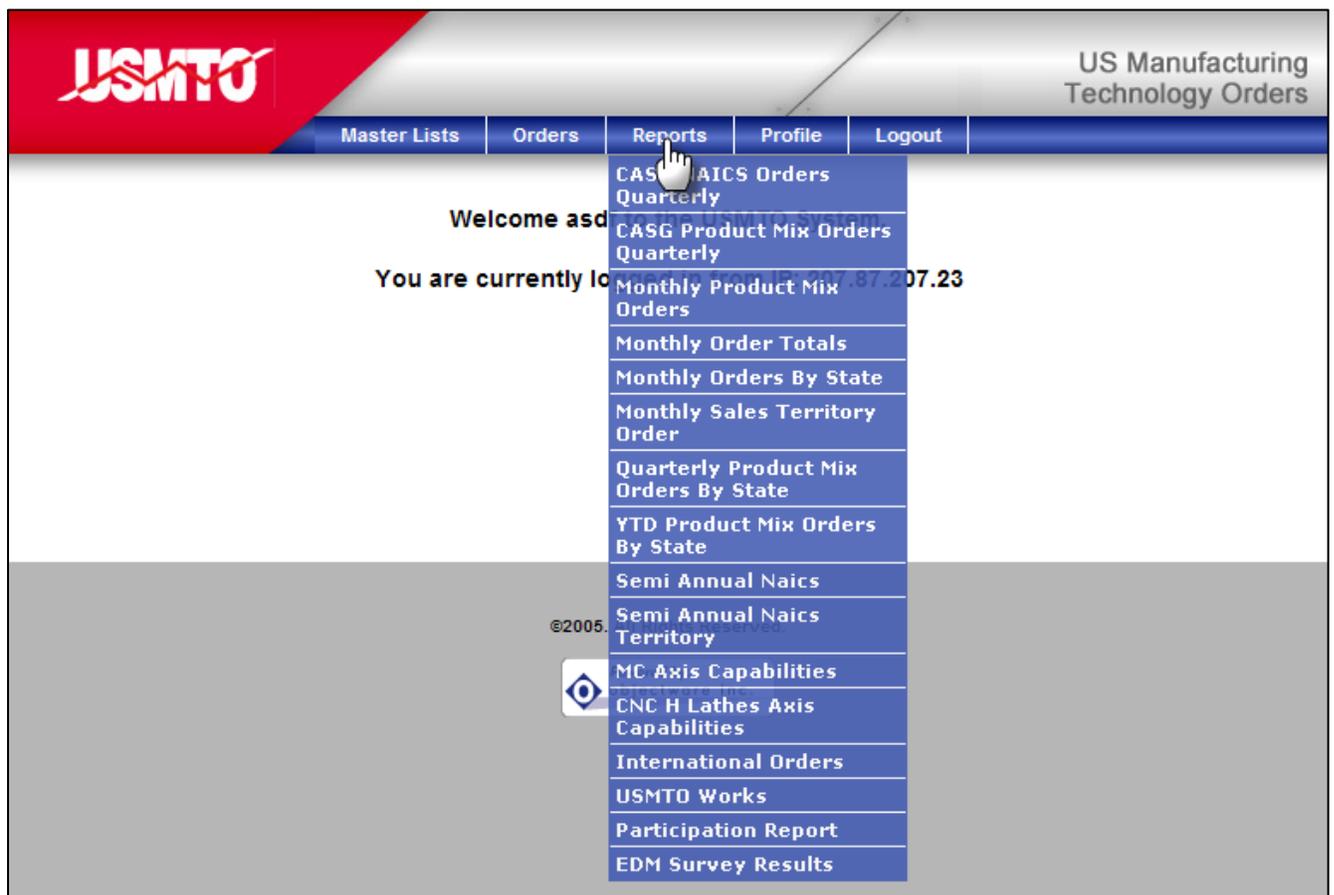
Click the **Delete** button to remove any one zip code from the territory definition.

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 effect until the next report processing has ended.

Viewing Reports

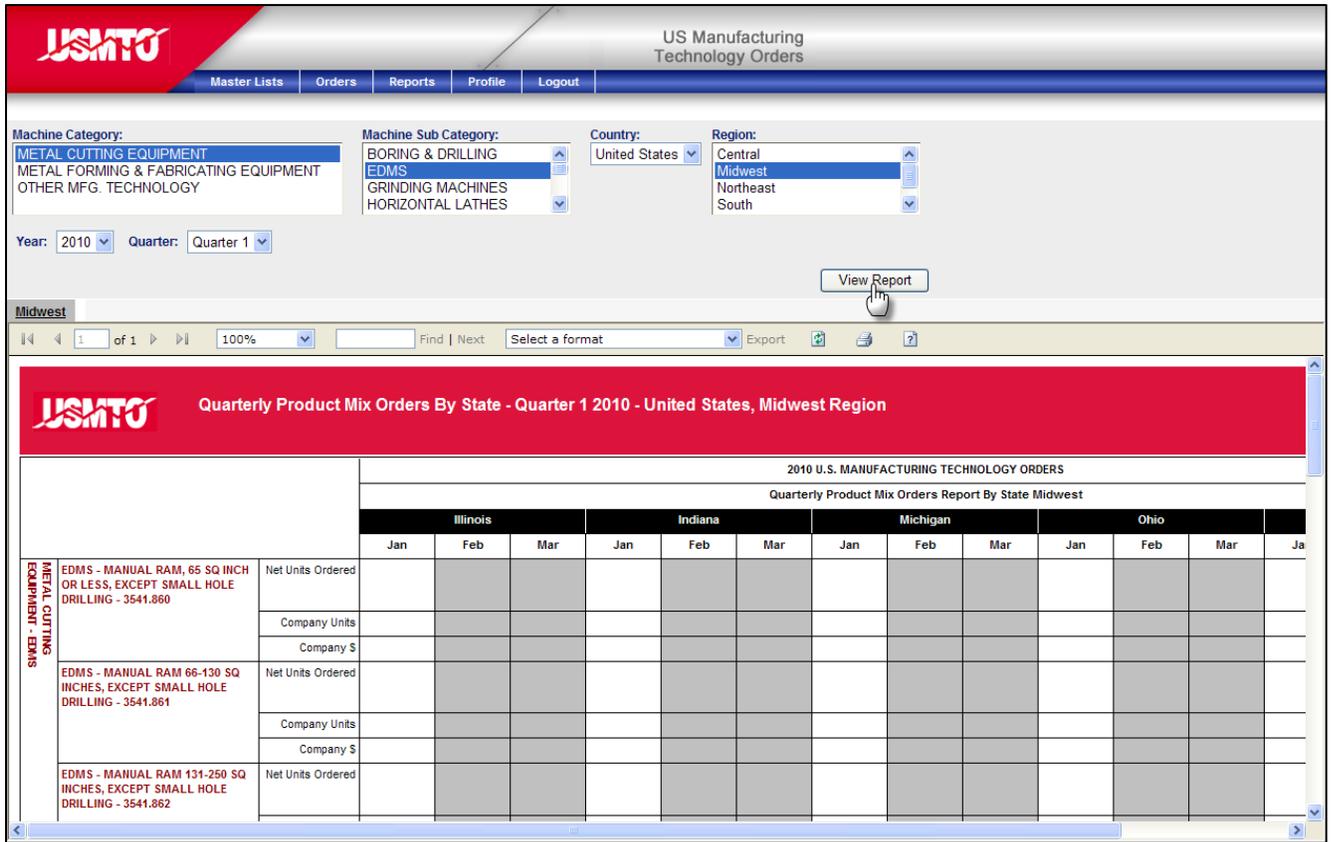
New reports will be made available after all current participants have entered orders for the current reporting period.

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.



Tip: Reports in USMTO are only available month-for-month – that is, you may only view data for the months in which you’ve entered orders.

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. The example below is from the **Quarterly Product Mix Orders by State** report, which displays machine-level market data for the selected year and quarter on a state-by-state basis.



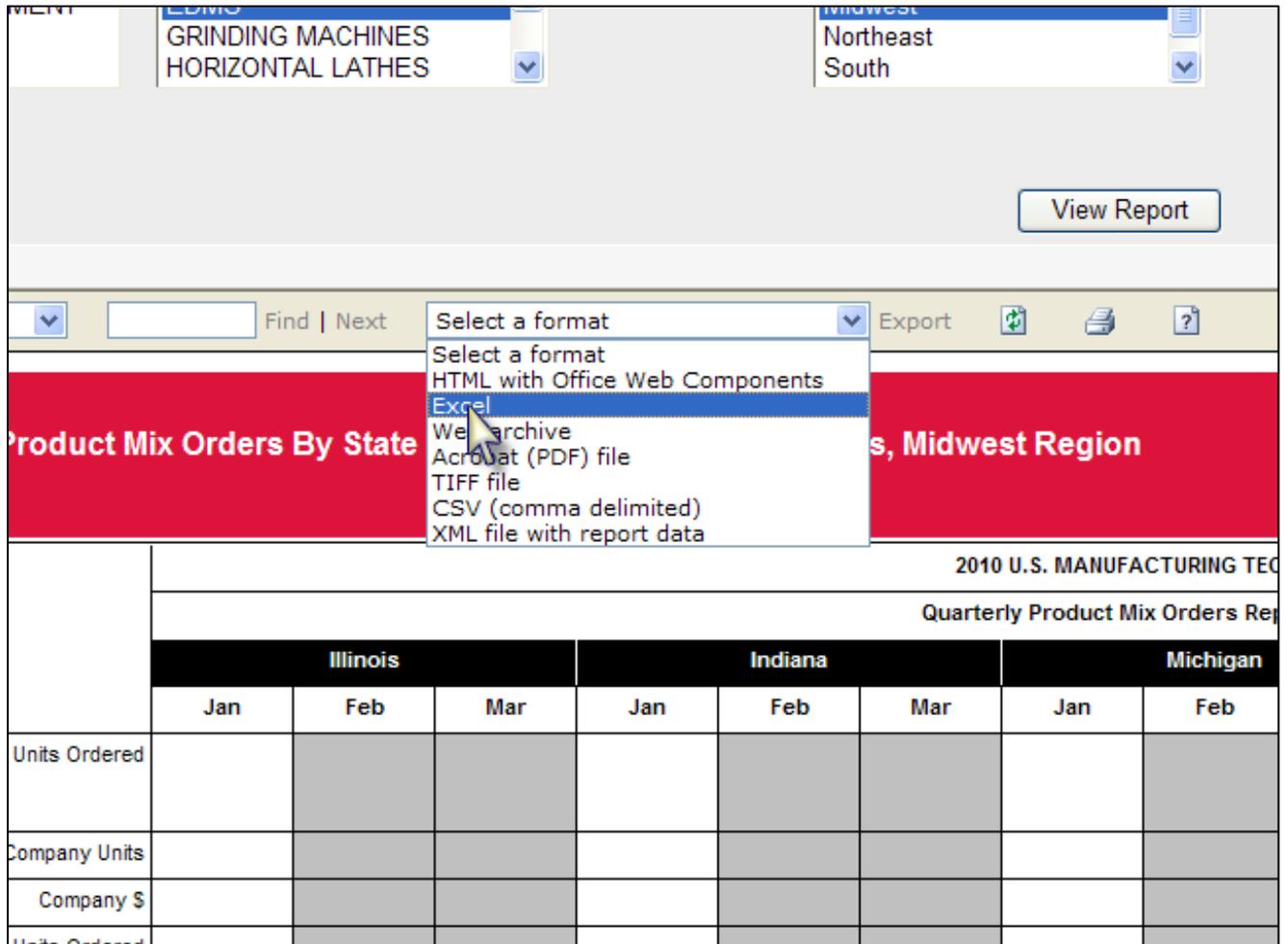
The screenshot shows the USMTO web application interface. At the top, there is a navigation menu with 'Master Lists', 'Orders', 'Reports', 'Profile', and 'Logout'. Below this, there are several filter sections: 'Machine Category' (with options like METAL CUTTING EQUIPMENT), 'Machine Sub Category' (with options like BORING & DRILLING), 'Country' (set to United States), and 'Region' (with options like Central, Midwest, Northeast, South). There are also dropdowns for 'Year' (2010) and 'Quarter' (Quarter 1). A 'View Report' button is visible on the right side of the filter section.

Below the filters, there is a table with the following structure:

		2010 U.S. MANUFACTURING TECHNOLOGY ORDERS											
		Quarterly Product Mix Orders Report By State Midwest											
		Illinois			Indiana			Michigan			Ohio		
		Jan	Feb	Mar	Jan	Feb	Mar	Jan	Feb	Mar	Jan	Feb	Mar
METAL CUTTING EQUIPMENT - EDMS	EDMS - MANUAL RAM, 65 SQ INCH OR LESS, EXCEPT SMALL HOLE DRILLING - 3541.860	Net Units Ordered											
		Company Units											
		Company \$											
METAL CUTTING EQUIPMENT - EDMS	EDMS - MANUAL RAM 66-130 SQ INCHES, EXCEPT SMALL HOLE DRILLING - 3541.861	Net Units Ordered											
		Company Units											
		Company \$											
METAL CUTTING EQUIPMENT - EDMS	EDMS - MANUAL RAM 131-250 SQ INCHES, EXCEPT SMALL HOLE DRILLING - 3541.862	Net Units Ordered											
		Company Units											
		Company \$											

Tip: For best results, use Internet Explorer when viewing reports in-browser. Other browsers will work but might not display all features.

Once the report has been created, you will have the ability to export the data into several different file formats.



The screenshot shows a web interface for viewing a report. At the top, there are dropdown menus for 'GRINDING MACHINES' and 'HORIZONTAL LATHES', and another for 'Northeast' and 'South'. A 'View Report' button is visible. Below this is a toolbar with a search box, 'Find | Next', and an 'Export' button. A dropdown menu is open under 'Export', listing options: 'Select a format', 'HTML with Office Web Components', 'Excel', 'Web archive', 'Acrobat (PDF) file', 'TIFF file', 'CSV (comma delimited)', and 'XML file with report data'. The main content area has a red header with the text 'Product Mix Orders By State' and 's, Midwest Region'. Below the header is a table titled '2010 U.S. MANUFACTURING TECHNOLOGY Quarterly Product Mix Orders Report'.

	2010 U.S. MANUFACTURING TECHNOLOGY							
	Quarterly Product Mix Orders Report							
	Illinois			Indiana			Michigan	
	Jan	Feb	Mar	Jan	Feb	Mar	Jan	Feb
Units Ordered								
Company Units								
Company \$								
Units Ordered								

1. Just above the reported data there will be a field box containing the phrase **Select a format** (shown above). Choose one from the list.
2. To the right of this box click the word **Export**.
3. 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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