



SmartBuild Systems

Getting Started

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Welcome to SmartBuild!

-- Getting Started --

Overview

The purpose of this guide is to provide you with step-by-step instructions on how setup your SmartBuild software. This guide is designed to get you up and running as quickly and efficiently as possible. The more accurate and detailed the information you provide during this setup process, the more accurate your quotes, diagrams and other outputs will be.

There are six specific tasks to be accomplished during the setup process:

- STEP 1:** *Define Sheathing Colors* – Define the colors to be made available for all your exterior steel sheathing materials.
- STEP 2:** *Upload Materials* – Import detailed information about all of your building materials into the SmartBuild materials database.
- STEP 3:** *Define Framing Rules* – Assign one or more usages for each of the different materials in your SmartBuild materials database.
- STEP 4:** *Configure Packages* – Create associations between materials used in conjunction with one another to fulfill a single function. (For example: a door, threshold and hardware.)
- STEP 5:** *Setup Model Templates Library* – Create a library of models your customers will use as templates to create their own designs.
- STEP 6:** *Customize Outputs* – Customize your quotes, material takeoffs, 2D and 3D diagrams, and other outputs to display your company's logo and desired content.

We're here to help...

Every company is different. A single guide, such as this, cannot take into account all of the variables users may encounter when setting up their software. *If you have any questions during the setup process we are here to help!* There are a variety of ways to contact our help desk:

- You can reach the support desk by emailing: support@keymark.com
- Or create a support ticket on our website: Support.smartbuildsystems.com

Additional Resources

In addition to this guide, we have other resources to help you learn more about the SmartBuild System. We have training videos, weekly live webinars, recordings of previous webinars, and release notes.

Check out our collection of SmartBuild **training videos**, on our YouTube channel.

https://www.youtube.com/playlist?list=PLMRs4X1scK0wZcO5eIKp0LV_LzAvWgUs1

Our live webinars are scheduled **every week on Wednesday at 9am Mountain Time**. You should receive an invitation email announcing the topic, and the link to register for the webinar. If you can't find your webinar invitation email, go to the registration page on our website to find out about the next webinar, and register.

<https://smartbuildsystems.com/webinar-landing-page/>

Check out the Resource page of our website, to watch **recordings of previous webinars**.

<https://smartbuildsystems.com/resources/>

We are currently releasing new versions of SmartBuild every two weeks. Check out the News & Blog page of our website to access previous **release notes**.

<https://smartbuildsystems.com/news/>

A Note about Terminology

Within the industry, and sometimes within a single company, multiple names are sometimes used to describe a single type of object. For example, the terms “header” and “truss carrier” are often used interchangeably, as well as the terms “post” and “column.” When it comes to naming the materials to be imported into your custom version of the SmartBuild materials database, we ask that users follow the naming conventions outlined within this document. This will ensure that all the 2D and 3D renderings, material takeoffs and quotes generated by SmartBuild are accurate. Rest assured that, once your materials have been entered into the database, SmartBuild provides all of the tools needed to name your materials in any way you choose, both within the system displays and in your outputs!

Default Database and CSV Templates

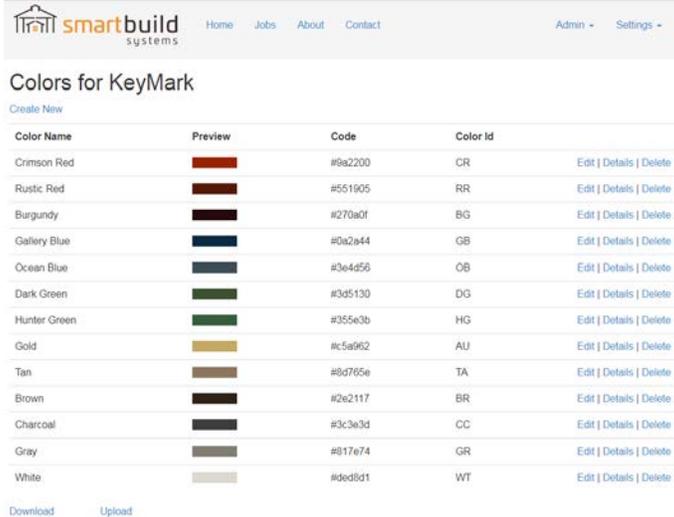
Our support department will create your company database in SmartBuild prior to you customizing/using the data. We will populate the colors and material databases with some default data.

There are a couple of reasons we do this. SmartBuild requires data to actually use the software. Having this default data, will allow your company to use the software prior to completing the creation of your actual database in the software.

Secondly, SmartBuild can only recognize data in a particular format. To help get the format correct, we have detailed descriptions in this document. However sometimes it's more helpful to have an actual template with which you can start the process of creating your actual database. SmartBuild gives you the option of downloading a file you can use as a template. This default data will also be downloaded, giving you an even better sample of what you need to create to populate your database.

Step 1: Define Colors

The first step in setting up SmartBuild is to define the palette of colors your company offers for its steel exterior sheathing, trim and fasteners. From the SmartBuild home page, click on the SETTINGS drop down, and then select COLORS. This will open the Colors window (below) that displays the set of default colors used by SmartBuild.



Color Name	Preview	Code	Color Id	
Crimson Red		#9a2200	CR	Edit Details Delete
Rustic Red		#551905	RR	Edit Details Delete
Burgundy		#270a0f	BG	Edit Details Delete
Gallery Blue		#0a2e44	GB	Edit Details Delete
Ocean Blue		#3e4d56	OB	Edit Details Delete
Dark Green		#3d5130	DG	Edit Details Delete
Hunter Green		#355e3b	HG	Edit Details Delete
Gold		#c5a962	AU	Edit Details Delete
Tan		#d765e	TA	Edit Details Delete
Brown		#2e2117	BR	Edit Details Delete
Charcoal		#3c3e3d	CC	Edit Details Delete
Gray		#817e74	GR	Edit Details Delete
White		#ded9d1	WT	Edit Details Delete

Within the Colors window, there are five basic functions you can perform.

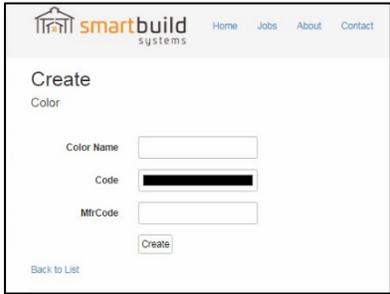
1. Create New – Add a completely new color to your palette.
2. Edit – Change the actual color, the Color Code, or the Color ID associated with a color that is currently in the list.
3. Delete – Delete a specific color, and all its associated properties, from your color palette.
4. Upload – This function allows you to create the color list from an uploaded CSV file.
5. Download – Download the current color list into a CSV file.

The DELETE and EDIT functions are fairly simple and straight forward, so we will not cover their use them here. For the moment, we will turn to the subject of creating an entirely new color to add to your custom color palette.

Create a New Color

To create an entirely new color, in the SmartBuild Colors window, click on CREATE NEW to open the CREATE COLOR box pictured at right. Creating a new color requires you to enter values into three fields, COLOR NAME, CODE, and MFR CODE. This process is described below:

1. COLOR NAME – Enter the specific name your company uses for this color. (Note: This field is not case sensitive.)



smartbuild systems

Create
Color

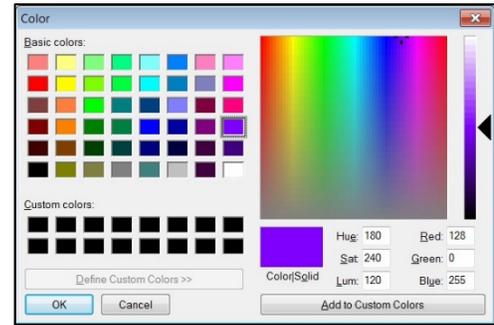
Color Name

Code

MfrCode

[Back to List](#)

2. CODE – The process of entering a value into the Code field varies, depending upon the internet browser program you are using. To enter a value into the CODE field using *Google Chrome*, click anywhere within the CODE field to open the COLOR dialog box shown at right. If you know the specific values for your color (**Red, Green, Blue, Hue, Saturation, and Luminosity**), you can enter them in the fields in the lower right-hand corner of this dialog box.



If you do not know your color's specific values, start by clicking on the BASIC COLOR that is closest to the new color you wish to define. You can then use the slide bar on the right side of the dialog box to fine-tune the color's values. When you are done, click on the OK button, and the COLORS dialog box will close.

If you are using *Microsoft Internet Explorer*, you must type in the **hexadecimal code** for your new color. (NOTE: THIS FIELD IS CASE SENSITIVE!) If you don't know the hex code for your new color, there are a variety of "color picker" apps on in the internet that will scan a color and give you this code. If you still need help, contact the SmartBuild Help Desk and we can look it up for you.

NOTE: If you are using a browser other than *Internet Explorer* or *Google Chrome*, and you have any questions about how to enter a value into the CODE field of this dialog box, please contact the SmartBuild Help Desk.

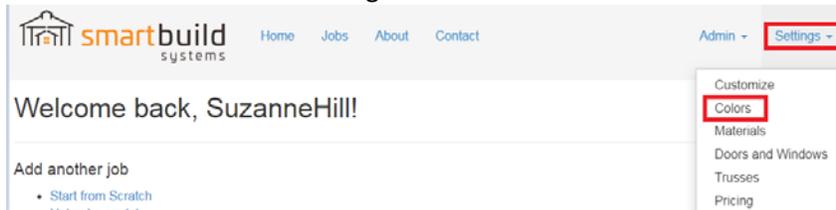
3. MFRCODE / COLOR ID – The value entered should relate back to the SKU numbers of your steel sheathing, trim and fasteners. If your current SKU's have a Color ID embedded in them, then you should use that same code/ID. When creating your material lists, these same codes will be used to generate unique SmartBuild SKU's.

Upload Color List

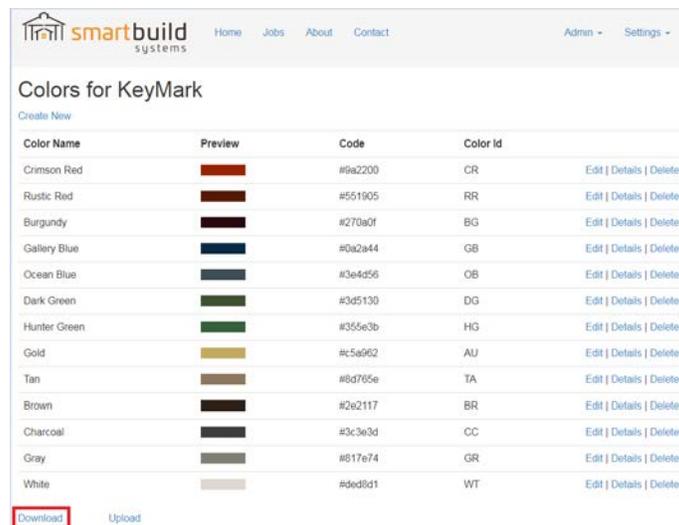
Instead of creating individual color entries as previously described, a CSV file with all available colors can be created which can then be uploaded to SmartBuild. To start this process, you can download a CSV file from SmartBuild to be used as a template to create this new Upload file.

Creating COLOR CSV File Template:

From the SmartBuild Home Page select COLORS from the SETTINGS drop down menu.



From the COLORS page, select the DOWNLOAD option.



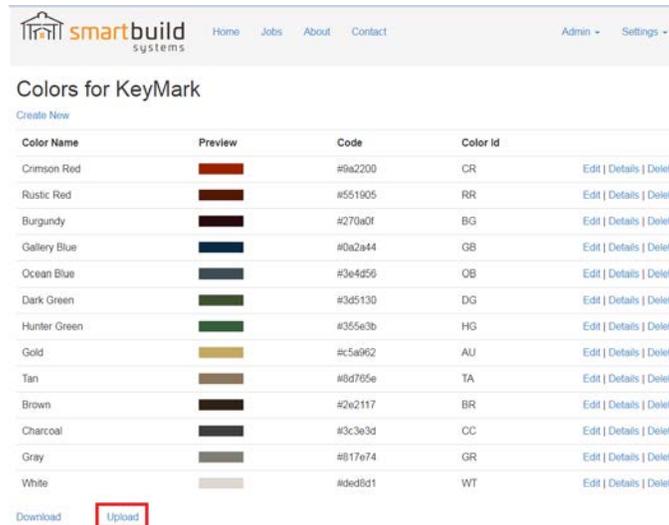
A file named “Colors-CompanyName.CSV” will be saved in your DOWNLOADS folder. If the database had any default data in it, you should delete this data from the file template, AND delete the entries individually in SmartBuild. The upload process will NOT delete an entry in the SmartBuild database. Below is the format of this file.

A	B	C
Color Name	Code	MfrCode
Crimson Red	#9a2200	CR
Rustic Red	#551905	RR
Burgundy	#270a0f	BG
Gallery Blue	#0a2a44	GB
Ocean Blue	#3e4d56	OB
Dark Green	#3d5130	DG
Hunter Green	#355e3b	HG
Gold	#c5a962	AU
Tan	#8d765e	TA
Brown	#2e2117	BR
Charcoal	#3c3e3d	CC
Gray	#817e74	GR
White	#ded8d1	WT

In this process, the hex code for the color is required, including the # symbol. The Color Name and MfrCode/Color ID are the same as defined above.

The color list displayed in the SmartBuild Colors window will be in the same order as the list uploaded, so you may want to consider an appropriate order of the color entries then put the CSV upload list in that order.

Once the CSV file is completed, navigate to the SmartBuild Colors window and select **UPLOAD** (at the bottom of the screen).



The **UPLOAD COLOR CSV** window will appear, allowing you to choose the Color CSV file (via Windows Explorer) to upload. Once the file is chosen, select **UPLOAD**.



When the upload is complete, SmartBuild will display the upload status (indicating success or failure of the upload).

Step 2: Setting up Material Databases

Major Types of Materials (Base / Ancillary)

Before beginning the process of importing information about your materials into the SmartBuild database, it is important to understand how the materials are managed within the system. In SmartBuild, all of your materials fall into one of two major types:

1. **Base Materials** – In SmartBuild, these are the materials that are displayed within the 2D and 3D renderings of your models. They include all materials associated with framing, sheathing, and trim. A model cannot be displayed within the SmartBuild interface until your Base Materials have been added to the materials database.
2. **Ancillary Materials** – These include all materials other than framing, sheathing, and trim. Ancillary Materials include items associated with doors, windows, foundations, hardware, fasteners, connectors, trusses and so on.

Categories of Materials

Within the two major types of material mentioned above (Base and Ancillary), SmartBuild uses multiple categories to group materials. The different categories used in SmartBuild are listed below. All materials need to be placed into one of these categories.

BASE Material:

- Framing
- Sheathing
- Trim

ANCILLARY Material:

- Walk Door
- Overhead Door
- Slider
- Windows
- Cupola (uploaded to Accessories tab)
- Foundation
- Hardware
- Walk Door Hardware
- Overhead Door Hardware
- Slider Hardware
- Window Hardware
- Cupola Hardware
- Connectors
- Fastener
- Labor
- Trusses

SmartBuild can also include your Truss database. Since the truss defining variables are different than any other category, **trusses will be handled separately**. For additional information about Trusses, see paragraph **Truss Data**.

Data Needed for Each Category (except Trusses)

A basic set of data is required by SmartBuild for every category. Several of the categories require an additional set of data that may be unique to that category. If the required data is missing or invalid, the upload may fail.

REQUIRED DATA NEEDED FOR EVERY CATEGORY

Below is the list of required data for every category:

Vendor SKU – your company's internal SKU / Part # or other ID used to designate this part.

Description/Material - A brief but informative description of each specific material.

SKU – SmartBuild SKU generated with Vendor SKU, and possibly Linear Feet and Color.

Full SKU – unique SKU generated with SmartBuild SKU, maps to Vendor SKU.

Category	Vendor SKU	Material	SKU	Full SKU
Framing	xxxxxxx	Material in predefined length	xxxxxx{LF}	SKU replacing {LF} with PartLength
Framing	xxxxxxx	Material by the foot	same as vendor SKU	same as vendor SKU
Sheathing	xxxxxxx	Material by the foot	xxxxxx{CC}	SKU replacing {CC} with Color ID
Sheathing	xxxxxxx	Material in predefined length	xxxx{LF}{CC}	SKU replacing {LF} with PartLength and {CC} with Color ID
Trim	xxxxxxx	Material in predefined length	xxxx{LF}{CC}	SKU replacing {LF} with PartLength and {CC} with Color ID
Trim	xxxxxxx	Material by the foot	xxxxxx{CC}	SKU replacing {CC} with Color ID
Door	xxxxxxx	Material/Description	same as vendor SKU	same as vendor SKU
Overhead	xxxxxxx	Material/Description	same as vendor SKU	same as vendor SKU
Slider	xxxxxxx	Material/Description	same as vendor SKU	same as vendor SKU
Window	xxxxxxx	Material/Description	same as vendor SKU	same as vendor SKU
Cupola	xxxxxxx	Material/Description	same as vendor SKU	same as vendor SKU
Foundation	xxxxxxx	Material/Description	same as vendor SKU	same as vendor SKU
Hardware	xxxxxxx	Material/Description	same as vendor SKU	same as vendor SKU
WalkDoorHardware	xxxxxxx	Material/Description	same as vendor SKU	same as vendor SKU
OverheadHardware	xxxxxxx	Material/Description	same as vendor SKU	same as vendor SKU
SliderHardware	xxxxxxx	Material/Description	same as vendor SKU	same as vendor SKU
WindowHardware	xxxxxxx	Material/Description	same as vendor SKU	same as vendor SKU
CupolaHardware	xxxxxxx	Material/Description	same as vendor SKU	same as vendor SKU
Connector	xxxxxxx	Material/Description	same as vendor SKU	same as vendor SKU
Fastener	xxxxxxx	Material/Description	xxxxxx{CC}	SKU replacing {CC} with Color ID
Labor	xxxxxxx	Material/Description	same as vendor SKU	same as vendor SKU

ADDITIONAL DATA NEEDED FOR SELECT CATEGORIES

All categories should also have the following pricing data. However, absence of this data will not cause the upload to fail. See the **Pricing Data** paragraph for more explanation of this data.

- Cost - Cost, with/without dollar sign. Leaving blank or 0 are valid choices
- Markup – cost to price markup percentage
- Price – Price, with/without dollar sign. Leaving blank or 0 are valid choices
- Taxable – Indicator of taxable status (0-nontaxable, 1-taxable)

The category will determine which of the following data is needed for each piece of material:

- Dim 1 – definition depends on category
- Dim 2 – definition depends on category
- Dim 3 – definition depends on category
- Part Length – length of part in decimal feet
- Color Code – MfrCode/Color ID from the Color List defined in Step 1

Categories with additional data needs are listed below, along with required fields.

FRAMING –

- Dim 1 – ACTUAL width in decimal inches (e.g. 2x4 has Dim 1 of 1.5)
- Dim 2 – ACTUAL depth in decimal inches (e.g. 2x4 has Dim 2 of 3.5)
- Part Length – length of part in decimal feet

SHEATHING –

- Dim 1 – Coverage width in decimal inches
- Dim 2 – Actual width in decimal inches
- Dim 3 – used to show texture in model
(current options: “standingseam”, “corrugated”, or “agpanel”)
- Color Code – MfrCode/Color ID from the Color List, when applicable

TRIM –

- Dim 1 – Reveal width in decimal inches
- Dim 2 – Thickness in decimal inches (if Z trim, use middle bend)
- Part Length – length of part in decimal feet
- Color Code – MfrCode/Color ID from the Color List, when applicable

WINDOW / WALK DOOR / OVERHEAD DOOR / SLIDER

- Dim 1 – Opening width in decimal feet
- Dim 2 – Opening height in decimal feet
- Dim 3 – (Optional) Image used for 3d model (initially leave blank)

CUPOLA (ACCESSORIES) –

- Dim 1 – Length / Width in decimal inches
- Dim 2 – Height in decimal inches
- Dim 3 – Roof Pitch

FASTENER –

- Color Code – MfrCode/Color ID from the Color List, when applicable

Below is a layout of the **additional** data needed for each category (except the truss category). This grid does not include the Vendor SKU, SmartBuild SKU, Full SKU and Material/Description required for EVERY category.

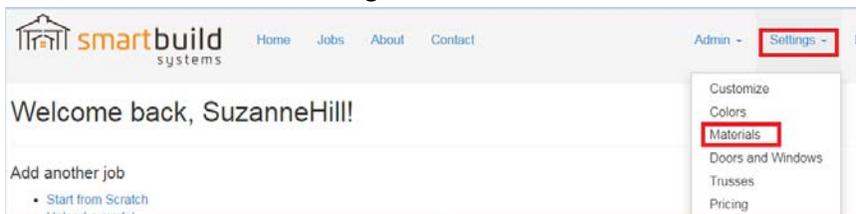
Category	Dim 1	Dim 2	Dim 3	Part Length	Color Code	Cost	Price	Taxable
Framing	ACTUAL Width in inches	ACTUAL Depth in inches	(leave blank)	length in feet	(leave blank)	\$, Blank, 0	\$, Blank, 0	0 or 1
Framing	ACTUAL Width in inches	ACTUAL Depth in inches	(leave blank)	(leave blank)	(leave blank)	\$, Blank, 0	\$, Blank, 0	0 or 1
Sheathing	Coverage Width in inches	Actual Width in inches	standingseam / corrugated / agpanel	(leave blank)	MfrCode/Color ID	\$, Blank, 0	\$, Blank, 0	0 or 1
Sheathing	Coverage Width in inches	Actual Width in inches	standingseam / corrugated / agpanel	length in feet	(leave blank)	\$, Blank, 0	\$, Blank, 0	0 or 1
Trim	Reveal width in inches	Thickness in inches	(leave blank)	length in feet	MfrCode/Color ID	\$, Blank, 0	\$, Blank, 0	0 or 1
Trim	Reveal width in inches	Thickness in inches	(leave blank)	(leave blank)	MfrCode/Color ID	\$, Blank, 0	\$, Blank, 0	0 or 1
Door	Opening Width in feet	Opening Height in feet	3D Model - initially leave blank	(leave blank)	(leave blank)	\$, Blank, 0	\$, Blank, 0	0 or 1
Overhead	Opening Width in feet	Opening Height in feet	3D Model - initially leave blank	(leave blank)	(leave blank)	\$, Blank, 0	\$, Blank, 0	0 or 1
Slider	Opening Width in feet	Opening Height in feet	3D Model - initially leave blank	(leave blank)	(leave blank)	\$, Blank, 0	\$, Blank, 0	0 or 1
Window	Opening Width in feet	Opening Height in feet	3D Model - initially leave blank	(leave blank)	(leave blank)	\$, Blank, 0	\$, Blank, 0	0 or 1
Cupola	Length/Width in inches	Height in inches	roof pitch	(leave blank)	(leave blank)	\$, Blank, 0	\$, Blank, 0	0 or 1
Foundation	(leave blank)	(leave blank)	(leave blank)	(leave blank)	(leave blank)	\$, Blank, 0	\$, Blank, 0	0 or 1
Hardware	(leave blank)	(leave blank)	(leave blank)	(leave blank)	(leave blank)	\$, Blank, 0	\$, Blank, 0	0 or 1
WalkDoorHardware	(leave blank)	(leave blank)	(leave blank)	(leave blank)	(leave blank)	\$, Blank, 0	\$, Blank, 0	0 or 1
OverheadHardware	(leave blank)	(leave blank)	(leave blank)	(leave blank)	(leave blank)	\$, Blank, 0	\$, Blank, 0	0 or 1
SliderHardware	(leave blank)	(leave blank)	(leave blank)	(leave blank)	(leave blank)	\$, Blank, 0	\$, Blank, 0	0 or 1
WindowHardware	(leave blank)	(leave blank)	(leave blank)	(leave blank)	(leave blank)	\$, Blank, 0	\$, Blank, 0	0 or 1
CupolaHardware	(leave blank)	(leave blank)	(leave blank)	(leave blank)	(leave blank)	\$, Blank, 0	\$, Blank, 0	0 or 1
Connector	(leave blank)	(leave blank)	(leave blank)	(leave blank)	(leave blank)	\$, Blank, 0	\$, Blank, 0	0 or 1
Fastener	(leave blank)	(leave blank)	(leave blank)	(leave blank)	MfrCode/Color ID	\$, Blank, 0	\$, Blank, 0	0 or 1
Labor	(leave blank)	(leave blank)	(leave blank)	(leave blank)	(leave blank)	\$, Blank, 0	\$, Blank, 0	0 or 1

Format of Material Upload File (except Trusses)

SmartBuild requires the upload file be a CSV file. You can create either a **single CSV file**, with all of your materials, or **multiple CSV files**, with each separate file containing a single category of materials. As previously mentioned, you can download a CSV file from SmartBuild to be used as a template for this Upload file.

Creating the MATERIALS & DOORS/WINDOWS CSV File Template:

From the SmartBuild Home Page select MATERIALS from the SETTINGS dropdown menu.



From the MATERIALS (or DOORS/WINDOWS) page, select the DOWNLOAD option.



A file named “Materials-CompanyName.CSV” will be saved in your DOWNLOADS folder. Use this as the template for your upload CSV file. If the database had any default data in it, you should delete this data from the file template, AND delete the entries individually in SmartBuild. The upload process will NOT delete an entry in the SmartBuild database.

The columns in the upload file can be in a different order, but the **column headers** must be spelled exactly as in the example below.

Category	SKU	Full SKU	Vendor SKU	Material	Dim 1	Dim 2	Dim 3	Part Length	Color Code	Cost	Markup	Price	Taxable
Connector	HANGER01	HANGER01	HANGER01	NAILS PURLIN HANGER						\$10.00		\$20.00	1
Cupola	C24	C24	C24	KEY 2' x 2' Square Cupola	24	18	12			\$144.00		\$144.00	1
CupolaHardware	WV-BEAR-30	WV-BEAR-30	WV-BEAR-30	Weathervane BLACK BEAR 30						\$10.00		\$20.00	1
Door	3068	3068	3068	3'w x 6' 8"h KEY Walk Door	3	6.66667				\$100.00		\$100.00	1
Fastener	FAST[CC]	FASTCR	FASTCR	Screws					CR	\$12.00		\$12.00	1
Foundation	BACCEMPAD414	BACCEMPAD414	BACCEMPAD414	CEMENT PADS						\$10.00		\$20.00	1
Framing	LVL12	LVL12	LVL12	KEY 12" LVL (BY THE FOOT)	2	12	0			\$4.00		\$5.00	1
Framing	88[LF]DL	8820DL	8820DL	KEY 8x8	7.25	7.25	0	20		\$26.67		\$26.67	1
Sheathing	CR26[CC]	CR26CR	CR26CR	KEY 26 ga Corrugated	36	37.5	standingseam		CR	\$2.05		\$2.05	1
Slider	SLIDER -10x10	SLIDER -10x10	SLIDER -10x10	10x10 KEY Slider	10	10				\$9,999.00		\$9,999.00	1
Slider	SLIDER-12x12	SLIDER-12x12	SLIDER-12x12	12x12 KEY Slider	12	12				\$9,999.00		\$9,999.00	1
Slider	SLIDER-16X12	SLIDER-16X12	SLIDER-16X12	16x12 KEY Slider	16	12				\$9,999.00		\$9,999.00	1
SliderHardware	BACCENGUIST	BACCENGUIST	BACCENGUIST	CENTER GUIDE & STOP						\$10.00		\$20.00	1
Trim	DT10[LF][CC]	DT1010CR	DT1010CR	KEY 10 7/8" Overhead Door Trim	10.875	1.5	0	10	CR	\$5.44		\$5.44	1
WalkDoorHardware	LOCK-EZ-2K/K	LOCK-EZ-2K/K	LOCK-EZ-2K/K	ADVANTAGE-KNOB/KNOB ENTRY						\$10.00		\$20.00	1
Window	2040	2040	2040	2'w x 4'h KEY Window	2	4				\$40.00		\$40.00	1
WindowHardware	SHUT-15X63-BLK	SHUT-15X63-BLK	SHUT-15X63-BLK	SHUTTERS 15X63 VINYL - BLACK						\$10.00		\$20.00	1

Another requirement is that the **category names** be spelled exactly as listed below (please note there aren't any spaces in these category names):

- Framing
- Sheathing
- Trim
- Door
- OverheadDoor
- Slider
- Window
- Cupola
- Foundation
- Hardware
- WalkDoorHardware
- OverheadDoorHardware
- SliderHardware
- WindowHardware
- CupolaHardware
- Connector
- Fastener
- Labor

Review previous paragraph **Data Needed for Each Category** for definition of which data is needed for each category. If a material is in a category that doesn't require any of these columns of data, the field can be left blank (e.g. for a Foundation item, Dim 1, Dim 2, Dim 3, Part Length and Color Code fields can be left blank).

A	B	C	D	E	F	G	H	I	J	K	L	M
Category	Vendor SKU	SKU	Full SKU	Material	Dim 1	Dim 2	Dim 3	Part Length	Color Code	Cost	Price	Taxable
Window	2626	2626	2626	2' 6" w x 2' 6" h Window	2.5	2.5				\$1.00	\$2.00	1
Foundation	50CONC	50CONC	50CONC	50# Bag Concrete						\$1.00	\$2.00	1

If the format of the Basic Upload File is not as expected, SmartBuild may abort the upload, displaying informative error messages to help identify the problem in the upload file.

Exporting Material Lists from Existing Software

An important step for gathering material data for SmartBuild is to retrieve any lists from the software currently in use (e.g. Maestro, PostFrame Manager, Epicor, Quickbooks, etc). Material lists can usually be exported from existing software (most likely in CSV file format). It's helpful to only include material used with post frame structures. Including other material will clutter your material database. This exported material list will be used as the basis for extracting and reformatting the data needed by SmartBuild.

Preparing Material List for Upload (except Trusses)

Using the downloaded "Materials-CompanyName.CSV" as the template, you have started the process of creating your new upload file. You can either copy the bulk of the data from the exported file/material list discussed in the previous paragraph into this new upload file, or you can keep that data separate, and copy the data a field/line item at a time. This is personal preference.

Fill in the appropriate columns in the new file with data from the exported material list. There won't be a one to one correspondence between the columns in the two files (the exported file, and the new upload file). You will probably need to extract the data from certain columns in the exported file, and distribute the data to the appropriate columns in the new file. Below are some examples:

1 – The **Vendor SKU** from the exported file is used to create the SmartBuild SKU and the Full SKU. For all categories **except framing, sheathing, trim and fasteners**, the Vendor SKU is simply copied to the SmartBuild **SKU** and the **Full SKU**. Additional information may be needed to create the new SmartBuild SKU and Full SKU for the exceptions mentioned (framing, sheathing, trim and fasteners).

Please note: during the process of building the SmartBuild SKU and the Full SKU, the column with the Vendor SKU will stay the same. The Vendor SKU is never changed regardless of what is done to create the SmartBuild SKU and the Full SKU. This Vendor SKU should be a link from SmartBuild to your inventory or accounting system.

Framing item with Fixed Part Length (SmartBuild SKU needs to be built with {LF}):

If the Vendor SKU has the Linear Feet embedded in it,
then extract the Linear Feet and replace it with {LF} to build the SmartBuild SKU.
The Full SKU will be generated from the new SmartBuild SKU,
but with the {LF} replaced by the actual Linear Feet.

If the Vendor SKU does NOT have the linear feet embedded in it,
then copy the Vendor SKU to the SmartBuild SKU, and append {LF} to it.
The Full SKU will be generated from the new SmartBuild SKU
but with the {LF} replaced by the actual Linear Feet.

Any reference to linear feet in the Material column in the new file should be removed so this field will be exactly the same for every entry with the same SmartBuild SKU.

Category	SKU	Full SKU	Vendor SKU	Original Description*	Material	Dim 1	Dim 2	Dim 3	Part Length	Color Code	Cost	Markup	Price	Taxable
Framing	LVL12{LF}	LVL1216	LVL1216	KEY 12" LVL 16'	KEY 12" LVL	2	12		16		\$30.00	10.00%	\$33.00	1
Framing	210{LF}DL	2108DL	2108DL	KEY 2x10 8'	KEY 2x10	1.5	9.25		8		\$50.00	0.00%	\$50.00	1
Framing	210{LF}DL	21010DL	21010DL	KEY 2x10 10'	KEY 2x10	1.5	9.25		10		\$6.00	0.00%	\$6.00	1
Framing	212{LF}DL	21214DL	21214DL	KEY 2x12 14'	KEY 2x12	1.5	11.25		14		\$7.00	0.00%	\$7.00	1
Framing	212{LF}DL	21216DL	21216DL	KEY 2x12 16'	KEY 2x12	1.5	11.25		16		\$8.00	0.00%	\$8.00	1
* ORIGINAL DESCRIPTION is only included to show the difference between it and the new MATERIAL description that will be uploaded to SmartBuild														
Do Not Upload the ORIGINAL DESCRIPTION column, you'll get an error message														

Framing item with Random Part Length (Random Length):

The SmartBuild SKU and Full SKU can be exactly the same as the Vendor SKU. The Part Length should be left blank, and the cost/price data should be the cost/price for one foot of material.

Category	SKU	Full SKU	Vendor SKU	Original Description*	Material	Dim 1	Dim 2	Dim 3	Part Length	Color Code	Cost	Markup	Price	Taxable
Framing	LVL12	LVL12	LVL12	KEY 12" LVL (BY THE FOOT)	KEY 12" LVL (BY THE FOOT)	2	12				\$4.00	10.00%	\$4.40	1
Framing	212DL	212DL	212DL	2x12 sold by the foot	2x12	1.5	11.25				\$8.00	5.00%	\$8.40	1
* ORIGINAL DESCRIPTION is only included to show the difference between it and the new MATERIAL description that will be uploaded to SmartBuild														
Do Not Upload the ORIGINAL DESCRIPTION column, you'll get an error message														

Sheathing and Fasteners (SmartBuild SKU needs to be built with {CC}):

If there isn't a color associated with the Sheathing/Fastener,
then the Vendor SKU will simply be copied to the SmartBuild SKU and the Full SKU.

If there is a color associated with the Sheathing/Fastener, the SmartBuild SKU will need to be created with {CC} .

If the Vendor SKU has the color code embedded in it,
then extract that code and replace it with {CC} to build the SmartBuild SKU.
The Full SKU will be generated from the new SmartBuild SKU
but with {CC} replaced by the actual Color Code (MfrCode/Color ID).

If the Vendor SKU does NOT have the color code embedded in it,
then copy the Vendor SKU to the SmartBuild SKU, and append {CC} to it.
The Full SKU will be generated from the new SmartBuild SKU
but with {CC} replaced by the actual Color Code (MfrCode/Color ID).

Any reference to color in the Material column in the new file should be removed so this field will be exactly the same for every entry with the same SmartBuild SKU.

Every item requires a separate entry for EVERY available color (i.e. if the same item comes in 10 colors, there needs to be 10 entries in the material list.)

Category	SKU	Full SKU	Vendor SKU	Original Description*	Material	Dim 1	Dim 2	Dim 3	Part Length	Color Code	Cost	Markup	Price	Taxable
Fastener	FAST{CC}	FASTCR	FASTCR	Screws - Cranberry Red	Screws					CR	\$12.00	0.00%	\$12.00	1
Fastener	FAST{CC}	FASTRR	FASTRR	Screws - Really Red	Screws					RR	\$12.00	0.00%	\$12.00	1
Fastener	FAST{CC}	FASTBG	FASTBG	Screws - Beige	Screws					BG	\$12.00	0.00%	\$12.00	1
Sheathing	CR26{CC}	CR26CR	CR26CR	KEY 26 ga Corrugated - Cranberry Red	KEY 26 ga Corrugated	36	37.5	standingseam		CR	\$2.05	10.00%	\$2.26	1
Sheathing	CR26{CC}	CR26RR	CR26RR	KEY 26 ga Corrugated - Really Red	KEY 26 ga Corrugated	36	37.5	corrugated		RR	\$2.05	10.00%	\$2.26	1
Sheathing	CR26{CC}	CR26BG	CR26BG	KEY 26 ga Corrugated - Beige	KEY 26 ga Corrugated	36	37.5	agpanel		BG	\$2.05	10.00%	\$2.26	1
* ORIGINAL DESCRIPTION is only included to show the difference between it and the new MATERIAL description that will be uploaded to SmartBuild Do Not Upload the ORIGINAL DESCRIPTION column, you'll get an error message														

Sheathing sold by Fixed Part Length (SmartBuild SKU needs to be built with {LF} & {CC}):

Generating this SmartBuild SKU and Full SKU for Sheathing sold by the fixed Part Length is complicated by the fact that both Linear Feet and Color Codes need to be used. Follow both processes above (for Framing/Sheathing) to create a Sheathing SmartBuild SKU with both {LF} and {CC}.

Category	SKU	Full SKU	Vendor SKU	Original Description*	Material	Dim 1	Dim 2	Dim 3	Part Length	Color Code	Cost	Markup	Price	Taxable
Sheathing	CR10{LF}{CC}	CR10LFWT	CR10LFWT	Sheathing by the 10' sheet - White	Sheathing by the Sheet	36	37.5	ndingse	10	WT	\$40.00	10.00%	\$44.00	1
Sheathing	CR14{LF}{CC}	CR14LFWT	CR14LFWT	Sheathing by the 14' sheet - White	Sheathing by the Sheet	36	37.5	ndingse	14	WT	\$40.00	10.00%	\$44.00	1
* ORIGINAL DESCRIPTION is only included to show the difference between it and the new MATERIAL description that will be uploaded to SmartBuild Do Not Upload the ORIGINAL DESCRIPTION column, you'll get an error message														

Trim item with Fixed Part Length (SmartBuild SKU needs to be built with both {LF} & {CC}):

Generating the SmartBuild SKU and Full SKU for Trim is complicated by the fact that both Linear Feet and Color Codes may be used. Follow both processes above (for Framing/Sheathing) to create a Trim SmartBuild SKU with both {LF} and {CC}.

Category	SKU	Full SKU	Vendor SKU	Original Description*	Material	Dim 1	Dim 2	Dim 3	Part Length	Color Code	Cost	Markup	Price	Taxable
Trim	FA12{LF}{CC}	FA1210CR	FA1210CR	KEY 12" Fascia - Cranberry Red	KEY 12" Fascia	12	0		10	CR	\$6.00	10.00%	\$6.60	1
Trim	SF12{LF}{CC}	SF1210CR	SF1210CR	KEY 12" Soffit - Cranberry Red	KEY 12" Soffit	12	1		10	CR	\$6.00	10.00%	\$6.60	1
Trim	SF12{LF}{CC}	SF1210RR	SF1210RR	KEY 12" Soffit - Really Red	KEY 12" Soffit	12	1		10	RR	\$6.00	10.00%	\$6.60	1
Trim	SF12{LF}{CC}	SF1210BG	SF1210BG	KEY 12" Soffit - Beige	KEY 12" Soffit	12	1		10	BG	\$6.00	10.00%	\$6.60	1
Trim	FA3{LF}{CC}	FA310CR	FA310CR	KEY 3" Fascia - Cranberry Red	KEY 3" Fascia	3	0		10	CR	\$1.50	10.00%	\$1.65	1
Trim	FA3{LF}{CC}	FA310RR	FA310RR	KEY 3" Fascia - Really Red	KEY 3" Fascia	3	0		10	RR	\$1.50	10.00%	\$1.65	1
Trim	FA3{LF}{CC}	FA310BG	FA310BG	KEY 3" Fascia - Beige	KEY 3" Fascia	3	0		10	BG	\$1.50	10.00%	\$1.65	1
Trim	BF{LF}{CC}	BF10CR	BF10CR	KEY Flat Base - Cranberry Red	KEY Flat Base	1.5	0		10	CR	\$0.75	10.00%	\$0.83	1
* ORIGINAL DESCRIPTION is only included to show the difference between it and the new MATERIAL description that will be uploaded to SmartBuild Do Not Upload the ORIGINAL DESCRIPTION column, you'll get an error message														

Trim item with Random Part Length (SmartBuild SKU needs to be built with {CC}):

Build the SmartBuild SKU and Full SKU for trim sold in random lengths by the foot by including {CC}. The Part Length field should be left blank. The cost/price should also be the cost/price for one foot of material.

Category	SKU	Full SKU	Vendor SKU	Original Description*	Material	Dim 1	Dim 2	Dim 3	Part Length	Color Code	Cost	Markup	Price	Taxable
Trim	PT5{CC}	PT5BG	PT5BG	KEY 5 1/2" Post Trim (by the foot) - Beige	KEY 5 1/2" Post Trim	1.5	5.5			BG	\$0.75		\$0.75	1
Trim	BF{CC}	BFCR	BFCR	KEY Flat Base BY THE FOOT - Cranberry Red	KEY Flat Base BY THE FOOT	1.5	0			CR	\$0.75		\$0.75	1
* ORIGINAL DESCRIPTION is only included to show the difference between it and the new MATERIAL description that will be uploaded to SmartBuild Do Not Upload the ORIGINAL DESCRIPTION column, you'll get an error message														

2 – There is usually a one to one mapping with **Cost** and **Price** columns from the exported file to the new file. However you may need to watch out for a change in pricing units (e.g. switching from price/inch to price/foot). **Taxable** status is a usually straight forward. **Markup** can be defined or left out.

3 – **Dim 1, Dim 2, Part Length** and **Color Code** data may be determined from a variety of sources. Multiple fields in the exported file may contain data that can be extracted and distributed amongst these columns in the new file. The exported file may be formatted such that this information is in separate fields. However some of the data may be embedded in a field, requiring the exact data needed to be extracted. The material description and the Vendor SKU in the exported file are examples of this type of data. For Example:

Material Description is “6x6 8’ DL”. **Dim 1, Dim 2** and **Part Length** data can be extracted from the description in the exported file.

Vendor SKU is “0204LVL10” indicating 2x4 10’ LVL. **Dim 1, Dim 2** and **Part Length** data can be extracted from the Vendor SKU.

Material Description is “J CHANNEL 10’3” SMOKE GRAY” – **Part Length** and **Color Code** data can be extracted from the description in the exported file. The Colors List will be used to get the MfrCode/Color ID for “SMOKE GRAY”.

Category	SKU	Full SKU	Vendor SKU	Original Description*	Material	Dim 1	Dim 2	Dim 3	Part Length	Color Code	Cost	Markup	Price	Taxable
Framing	LVL12{LF}	LVL1216	LVL1216	KEY 12" LVL 16'	KEY 12" LVL	2	12		16		\$30.00	10.00%	\$33.00	1
Framing	210{LF}DL	2108DL	2108DL	KEY 2x10 8'	KEY 2x10	1.5	9.25		8		\$50.00	0.00%	\$50.00	1
Framing	210{LF}DL	21010DL	21010DL	KEY 2x10 10'	KEY 2x10	1.5	9.25		10		\$6.00	0.00%	\$6.00	1
Framing	212{LF}DL	21214DL	21214DL	KEY 2x12 14'	KEY 2x12	1.5	11.25		14		\$7.00	0.00%	\$7.00	1
Framing	212{LF}DL	21216DL	21216DL	KEY 2x12 16'	KEY 2x12	1.5	11.25		16		\$8.00	0.00%	\$8.00	1
Framing	88{LF}DL	8820DL	8820DL	KEY 8x8 20'	KEY 8x8	7.25	7.25		20		\$26.67	10.00%	\$29.34	1
Trim	DT10{LF}{CC}	DT1010CR	DT1010CR	KEY 10 7/8" Overhead Door Trim - Cranberry	KEY 10 7/8" Overhead Door T	10.875	1.5		10	CR	\$5.44	10.00%	\$5.98	1
Trim	FA12{LF}{CC}	FA1210RR	FA1210RR	KEY 12" Fascia - Really Red	KEY 12" Fascia	12			10	RR	\$6.00	10.00%	\$6.60	1
Trim	SF12{LF}{CC}	SF1210CR	SF1210CR	KEY 12" Soffit - Cranberry Red	KEY 12" Soffit	12	1		10	CR	\$6.00	10.00%	\$6.60	1
Trim	FA3{LF}{CC}	FA310CR	FA310CR	KEY 3" Fascia - Cranberry Red	KEY 3" Fascia	3			10	CR	\$1.50	10.00%	\$1.65	1
Trim	PT5{LF}{CC}	PT510BG	PT510BG	KEY 5 1/2" Post Trim - Beige	KEY 5 1/2" Post Trim	1.5			10	BG	\$0.75	10.00%	\$0.83	1
Trim	BF{LF}{CC}	BF10CR	BF10CR	KEY Flat Base - Cranberry Red	KEY Flat Base	1.5			10	CR	\$0.75	10.00%	\$0.83	1
* ORIGINAL DESCRIPTION is only included to show the difference between it and the new MATERIAL description that will be uploaded to SmartBuild														
Do Not Upload the ORIGINAL DESCRIPTION column, you'll get an error message														

Note: Dimensioned Lumber descriptions include the nominal dimensions (e.g. 2” x 4”). SmartBuild requires that the actual dimensions of 1.5” x 3.5” be entered into Dim 1 and Dim 2.

4 – **Dim 3** for cupola category is the pitch. **Dim 3** for sheathing, windows and doors is only used to determine how these materials will be displayed in the model. This data won’t be contained in the exported file. It may be just be company preference.

Sheathing Dim 3 Choices: standingseam, corrugated, agpanel
If left blank, the displayed sheathing appears smooth.

Doors/Windows Dim 3: object file to display on model. You can initially leave this field blank. You can also contact SmartBuild Support for help.

Category	SKU	Full SKU	Vendor SKU	Material	Dim 1	Dim 2	Dim 3	Part Length	Color Code	Cost	Markup	Price	Taxable
Cupola	C24	C24	C24	KEY 2' x 2' Square Cupola	24	18	4			\$144.00		\$144.00	1
Door	3070	3070	3070	3'w x 7'h KEY Walk Door	3	7				\$105.00		\$105.00	1
Sheathing	CR26(CC)	CR26CR	CR26CR	KEY 26 ga Corrugated	36	37.5	standingseam		CR	\$2.05	0.00%	\$2.05	1
Sheathing	CR26(CC)	CR26RR	CR26RR	KEY 26 ga Corrugated	36	37.5	corrugated		RR	\$2.05	0.00%	\$2.05	1
Sheathing	CR26(CC)	CR26BG	CR26BG	KEY 26 ga Corrugated	36	37.5	agpanel		BG	\$2.05	0.00%	\$2.05	1
Window	2040	2040	2040	2'w x 4'h KEY Window	2	4				\$40.00		\$40.00	1

Adding/Uploading Material (except Trusses)

Material can be added to SmartBuild in one of three ways:

- Basic File Upload
- Guided Upload
- Adding items one at a time

The initial addition of material to the SmartBuild database should be accomplished with the Guided Upload or the Basic File Upload since there could be thousands of items. The Guided Upload is a more user friendly option, guiding you to choose what you want to upload and mapping the appropriate fields. However this option can't be used to upload material with a color code in the SKU.

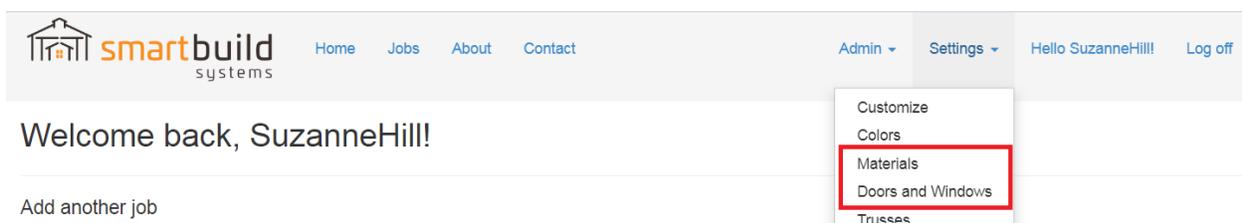
Once the correct format of the upload file is learned, the Basic File Upload can be a good choice to upload the material. To determine the correct format for the Basic Upload file, revisit the previous paragraphs **Format of Material Upload File** and **Preparing Material List for Upload**.

Adding items one at a time is appropriate when you only have one or two items to add (after your main database has already been created).

UPLOADING MATERIAL (FILE UPLOAD)

The Basic File Upload method requires a CSV file in the appropriate format. If SmartBuild detects an issue with the format of the file, the upload may be aborted and error message(s) will be displayed.

To start the file upload process, go to the Materials (or Doors/Windows) page via the SETTINGS drop down menu.



The screenshot shows the SmartBuild Systems user interface. At the top left is the logo and navigation links: Home, Jobs, About, Contact. On the right, there are links for Admin, Settings, Hello SuzanneHill!, and Log off. Below the navigation is a welcome message: "Welcome back, SuzanneHill!". Underneath that is a link: "Add another job". A dropdown menu is open from the "Settings" link, showing options: Customize, Colors, Materials (highlighted with a red box), Doors and Windows, and Trusses.

On either the Materials page (see below) or the Doors/Windows page, select the UPLOAD button



smartbuild systems Home Jobs About Contact Admin Settings Hello Suzanne Hill Log off

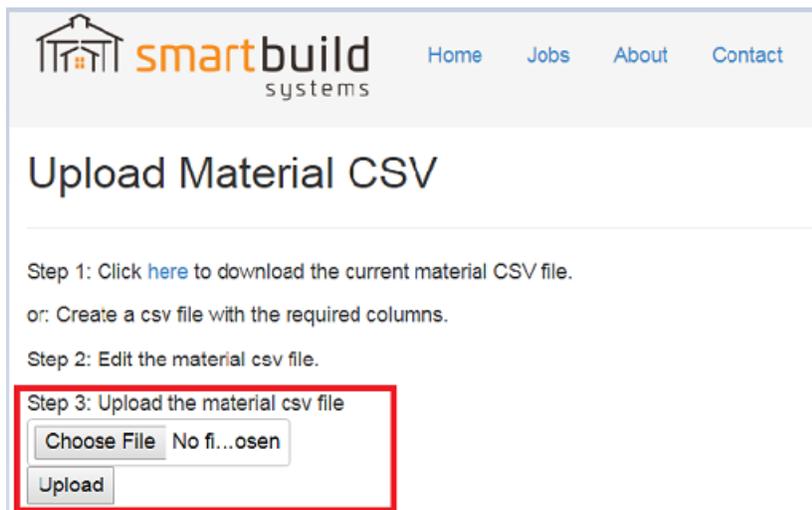
Materials for KeyMark

#	SKU	Description	Dimension 1	Dimension 2	Dimension 3
1	Z10{LF}DL	2x10	1.5	9.25	0

+ Add Edit Delete Delete ALL Guided Upload **Upload** Download

The UPLOAD MATERIAL page will be displayed.

Click on the CHOOSE FILE button, and choose the appropriate CSV file via Windows Explorer. Select UPLOAD.



smartbuild systems Home Jobs About Contact

Upload Material CSV

Step 1: Click [here](#) to download the current material CSV file.
or: Create a csv file with the required columns.

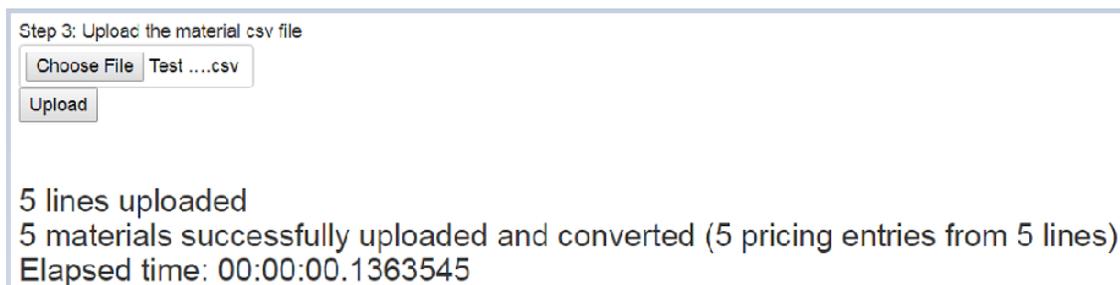
Step 2: Edit the material csv file.

Step 3: Upload the material csv file

Choose File No files chosen

Upload

If the upload is successful, a message will be displayed indicating the number of entries uploaded, along with the number of pricing entries created.



Step 3: Upload the material csv file

Choose File Testcsv

Upload

5 lines uploaded
5 materials successfully uploaded and converted (5 pricing entries from 5 lines)
Elapsed time: 00:00:00.1363545

If SmartBuild detects an issue with the data in the upload file, the upload may be aborted and error message(s) displayed. These messages may contain the line number(s) in the original file to help with the identification of the source of the error.

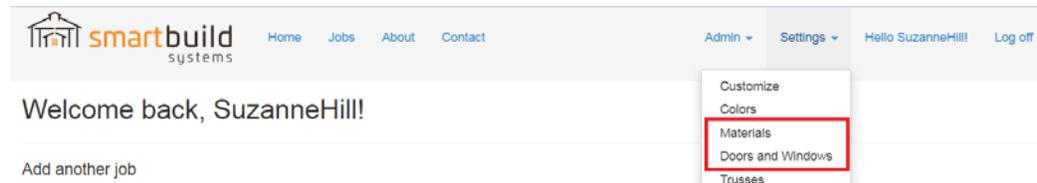


Examples of upload issues:

- Invalid Category listed (may not be using the exact spelling that SmartBuild requires)
- Missing/invalid values (each category has a set of required data)
- Different Material description for same SmartBuild SKU
- Same Material description for different SKU's

UPLOADING MATERIAL (GUIDED UPLOAD)

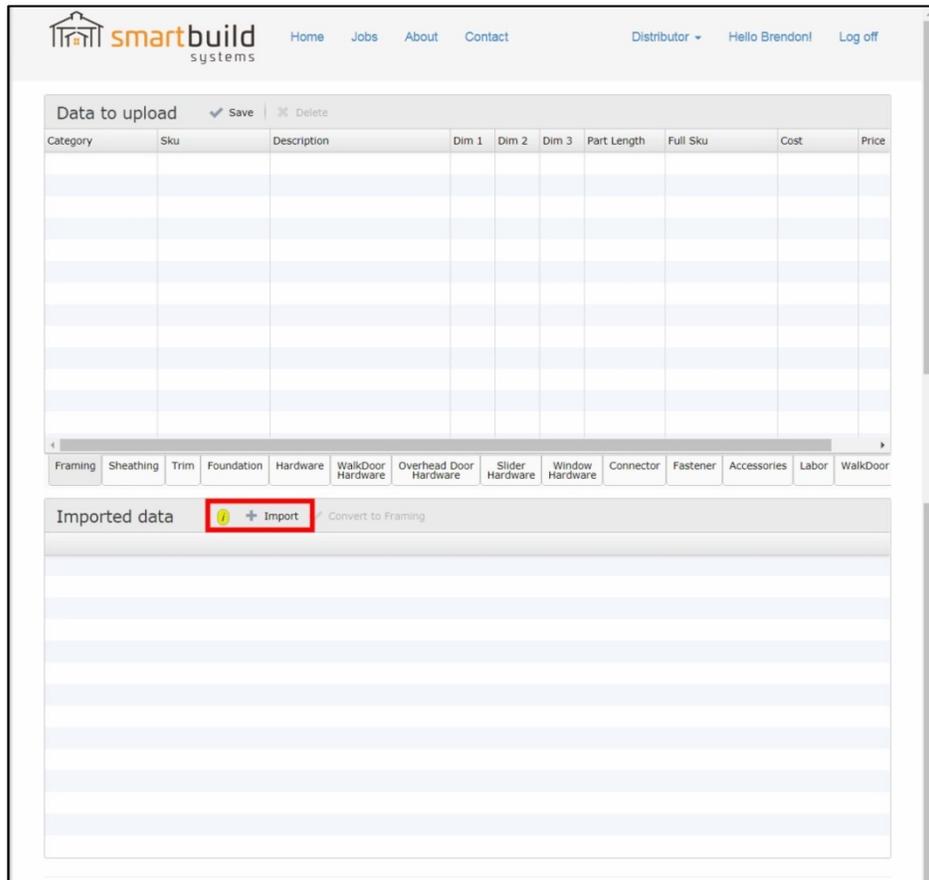
To import your material using the Guided Upload option data from a CSV file, go to the Materials, or Doors/Windows page.



On either the Materials page (see below) or the Doors/Windows page, select the GUIDED UPLOAD button.

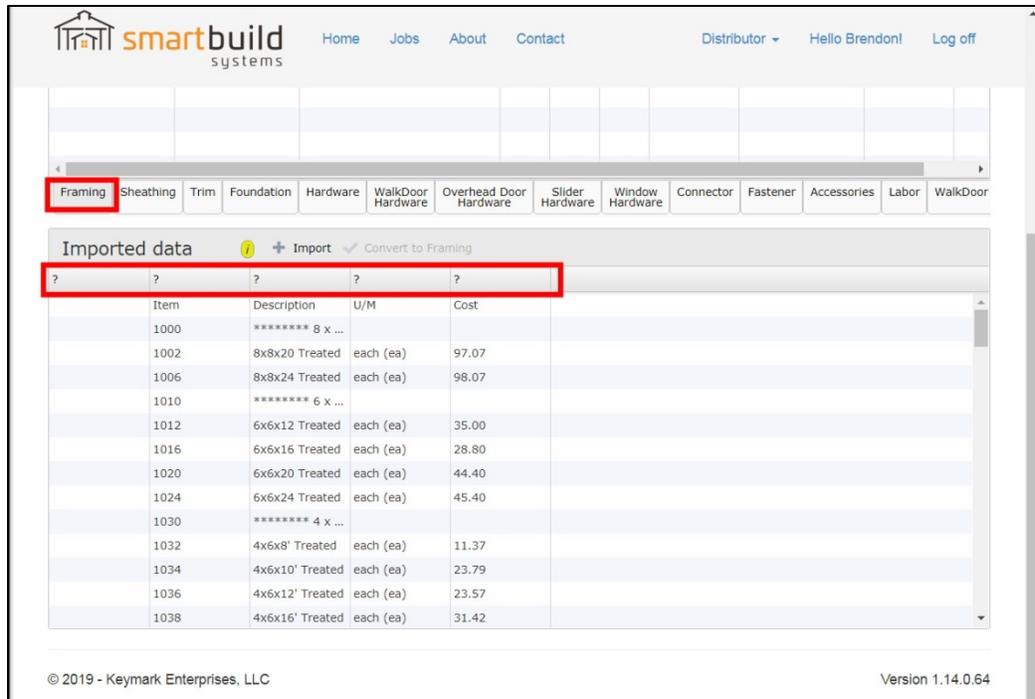


The DATA TO UPLOAD page will be displayed. On the bottom section of this page, click on the IMPORT button.



The LOAD A CSV FILE dialog box will open. Click on the CHOOSE FILE button to open Windows Explorer. Using Windows Explorer, navigate to the CSV file you have prepared for uploading. Select the file and click on the OK button to close Windows Explorer.

Once Windows Explorer closes, the bottom pane of your SmartBuild window will automatically populate with the data from your CSV file, as shown below.

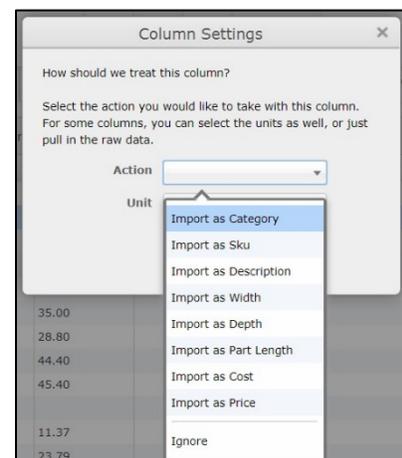


In the top half of the window, select that tab to which the data is to be added. (In the screen shot above, the FRAMING tab has been selected.) Notice that there are question marks where your column headers should be.

Click on each header that currently displays a question mark (?). In the CUSTOM SETTINGS dialog box that opens, select the name to be used as the header for that specific column of data. Repeat this process, until there are *NO* columns that display a question mark as their title.

Return to the rows of data on the bottom part of your screen, and select the specific rows to be added to your materials database. Click on the CONVERT TO (category) button. Notice that the selected data is moved from the bottom table into the table that you have selected above.

Be sure to hit the SAVE button when you have completed your work!



ADDING MATERIAL ONE ITEM AT A TIME

After a majority of the material has been uploaded, you may have an occasion to add one or two additional items. You can either create a CSV file to upload, or you can use the ADD function to add individual items.

Navigate to the Materials, or Doors/Windows page (using the SETTINGS drop down menu). On either the Materials page (see below) or the Doors/Windows page, select the ADD button.



Materials for KeyMark

#	SKU	Description	Dimension 1	Dimension 2	Dimension 3
1	210{LF}DL	2x10	1.5	9.25	0

The CREATE MATERIAL page will be displayed. Click the drop down arrow in the category field, and select the appropriate category of material to be added. Enter the SKU, Description, Dim 1, Dim 2, and Dim3 for the material to be added. Then select the CREATE button.



Create

Material

Category: Framing

SKU:

Description:

Dimension1:

Dimension2:

Dimension3:

Create

[Back to List](#)

Truss Data

SmartBuild can also include truss data. The data needed for trusses is different than all other materials (framing, sheathing, doors, etc.) discussed. The truss list is also added/uploaded from a different window.

Below are the truss fields that can be included in SmartBuild.

TRUSS

- Sku - your company's internal SKU / Part # or other ID used to designate this truss.
- Description - A brief but informative description of each truss
- TC Style – Choices: Common, Mono, Gambrel, Asymmetric, OffsetPeak
- Span – Span (format: 1' 6")
- Dim2 – offset in feet (format: 1' 6")
- Pitch - to nearest half inch (format: 4)
- Pitch2 - to nearest half inch (format: 4)
- Heel - height in inches, to nearest 1/8th (format: 1' 6")
- OH L – Overhang in feet (format: 1' 6")
- OH R – Overhang in feet (format: 1' 6")
- Cant L – Cantilever (format: 1' 6")
- Cant R – Cantilever (format: 1' 6")
- Spacing - (format: 1' 6")
- Loading – text string defining loading data
- Is Gable – Yes or leave blank
- Special – choices: flat, scissor, attic
(and the pricing data previously defined)

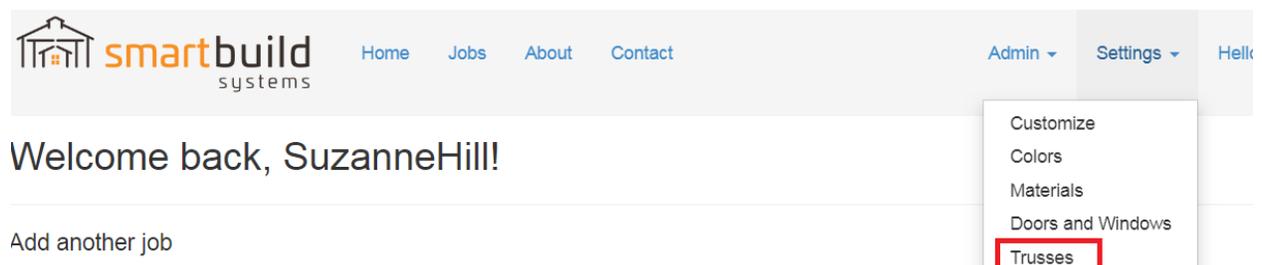
Trusses can be added individually, or using the Basic File Upload method. Guided Upload is not available for trusses.

Watch this training video for a better understanding of the Truss Table:

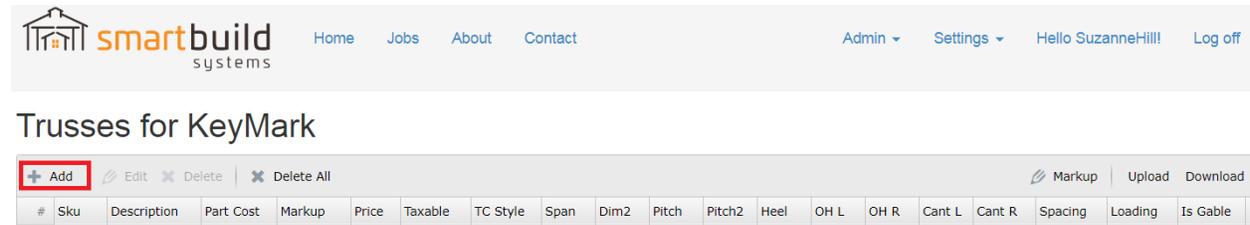
https://www.youtube.com/watch?v=E5gLwn_HJtI&t=9s

ADDING INDIVIDUAL TRUSSES

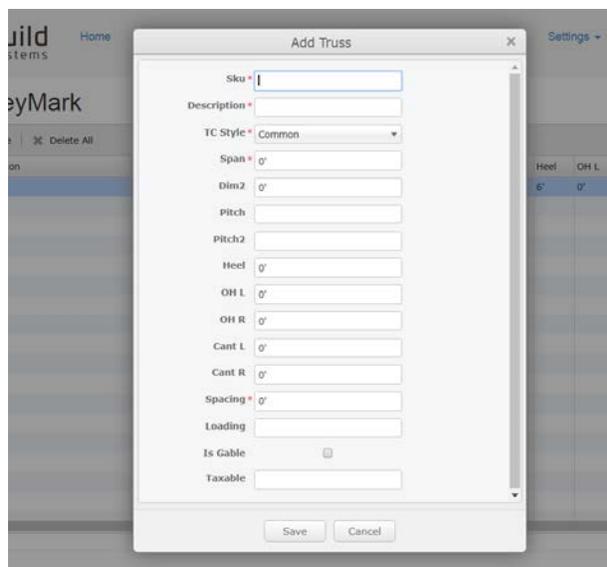
To add an individual truss, select the TRUSSES option from the SETTINGS menu:



The TRUSSES page will then be displayed. From this page, select the ADD option.



The ADD TRUSS dialog box will be displayed, allowing you to enter the truss definition data you want to add. Please note the required fields have an asterisk by the field name. Once all the data has been entered, select the SAVE button.

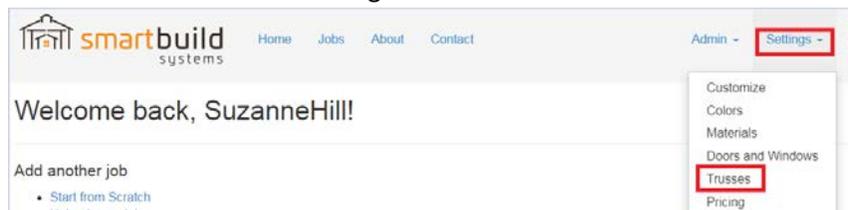


UPLOADING TRUSS DATA

The Basic File Upload method requires a CSV file in the appropriate format. As previously mentioned, you can download a CSV file from SmartBuild to be used as a template for this Upload file.

Creating TRUSSES CSV File Template:

From the SmartBuild Home Page select TRUSSES from the SETTINGS dropdown menu.



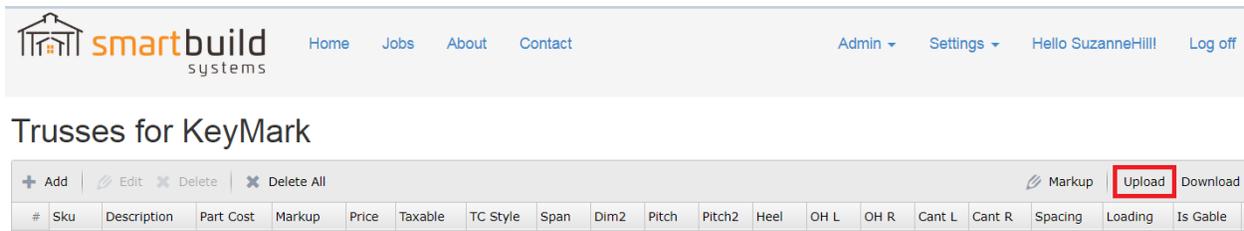
A file named "TrussList-CompanyName.CSV" will be saved in your DOWNLOADS folder. Use this as the template for your upload CSV file. If the database had any default data in it, you should delete this data

from the file template, AND delete the entries individually in SmartBuild. The upload process will NOT delete an entry in the SmartBuild database.

Below is the format of the **Truss** upload CSV file. A few samples are included to show how the actual data should be formatted. Please note that **column headers** must be spelled exactly as listed below, or SmartBuild will not recognize the data (and will most likely abort the upload). The required fields are highlighted in blue.

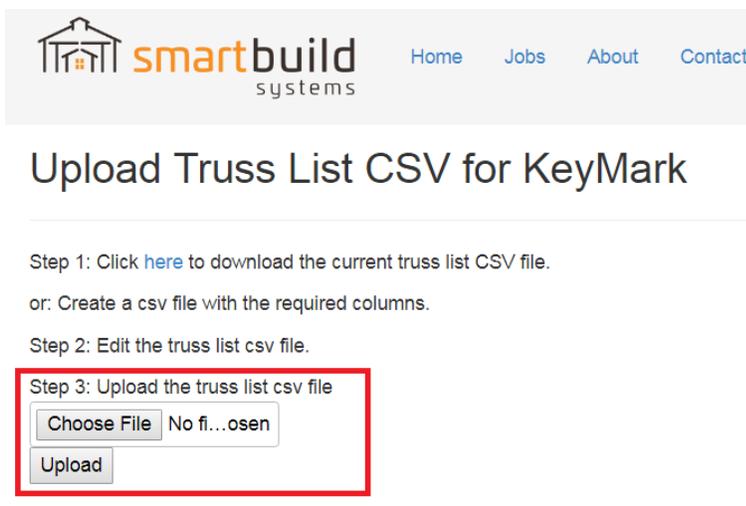
Sku	Description	TC Style	Span	Dim2	Pitch	Pitch2	Heel	OH L	OH R	Cant L	Cant R	Spacing	Loading	Is Gable	Cost	Markup	Price	Taxable	Special
Truss 01	Truss 01 - 18'	Common	18'	0' 5 1/2"	4	4	1' 6"	0'	0'	0'	0'	4'	30-10-10		\$500.00		\$600.00	1	
Truss 02	Truss 02 - 18' Span	Common	18'	0' 5 1/2"	4	4	1' 6"	0'	0'	0'	0'	4'	30-10-10	Yes	\$500.00		\$600.00	1	
Truss 03	Truss 03	Common	20'	0' 5 1/2"	4	4	1' 6"	1'	1'	0'	0'	4'	30-10-10		\$100.00		\$165.00	1	
C20P4HH18OH1SP4L30-10-10GB	Truss 04	Common	20'	0' 5 1/2"	4	4	1' 6"	1'	1'	0'	0'	4'	30-10-10	Yes	\$100.00		\$155.00	1	
C20P4HH18OH1SP8L30-10-10GB	Truss 05	Common	20'	0' 5 1/2"	4	4	1' 6"	1'	1'	0'	0'	8'	30-10-10	Yes	\$400.00		\$450.00	1	
C50P4HH18OH1SP4LGB	Truss 06	Common	50'	0' 3 1/2"	4	4	1' 6"	1'	1'	0'	0'	4'		Yes	\$375.00		\$380.00	1	
M1P4HH18OH2SP8L30-10-10GB	Truss 07	Mono	0' 1 1/8"	0' 1 1/2"	4	0	1' 6"	2'	0'	0'	0'	8'	30-10-10	Yes	\$100.00		\$200.00	1	
M8P4HH6OH2SP8L30-10-10GB	Truss 08	Mono	8'	0' 1 1/2"	4	0	0' 6"	0'	2'	0'	0'	8'	30-10-10	Yes	\$500.00		\$500.00	1	
O20P4HH18SP4L30-10-10GB	Truss 09	OffsetPeak	19' 7 13/16"	0' 5 1/2"	4	0	1' 6"	0'	0'	0'	0'	4'	30-10-10	Yes	\$500.00		\$700.00	1	
O30P4HH18SP4L30-10-10GB	Truss 10	OffsetPeak	29' 10 1/4"	0' 5 1/2"	4	4	1' 6"	0'	0'	0'	0'	4'	30-10-10	Yes	\$599.00		\$599.00	1	
*	*	*	*	0' 5 1/2"	4	4	1' 6"	0'	0'	0'	0'	4'	30-10-10	Yes	\$599.00		\$599.00	1	*Required

Once the file is completed, the next step is to upload it. From the TRUSSES page, select the **UPLOAD** button.



The screenshot shows the SmartBuild Systems Admin interface. At the top, there is a navigation bar with links for Home, Jobs, About, and Contact. On the right, there are links for Admin, Settings, and a user profile for Hello Suzanne Hilll. Below the navigation bar, the page title is "Trusses for KeyMark". Underneath, there is a toolbar with buttons for Add, Edit, Delete, and Delete All. To the right of the toolbar are buttons for Markup, Upload (highlighted with a red box), and Download. Below the toolbar is a table with columns for #, Sku, Description, Part Cost, Markup, Price, Taxable, TC Style, Span, Dim2, Pitch, Pitch2, Heel, OH L, OH R, Cant L, Cant R, Spacing, Loading, and Is Gable.

The **UPLOAD TRUSS LIST** page will be displayed. Click on the **CHOOSE FILE** button, and choose the appropriate CSV file via Windows Explorer. Select **UPLOAD**.



The screenshot shows the SmartBuild Systems Upload page. At the top, there is a navigation bar with links for Home, Jobs, About, and Contact. Below the navigation bar, the page title is "Upload Truss List CSV for KeyMark". The page contains three steps: Step 1: Click [here](#) to download the current truss list CSV file. or: Create a csv file with the required columns. Step 2: Edit the truss list csv file. Step 3: Upload the truss list csv file. In Step 3, there is a red box around a "Choose File" button (with "No fi...osen" next to it) and an "Upload" button below it. At the bottom left, there is a "Back to List" link.

When the upload is completed, SmartBuild will display the upload status. If successful, a message indicating the number of trusses uploaded will be displayed. If not successful, SmartBuild will provide informative error messages to help identify the problem in the upload file.

Pricing Data

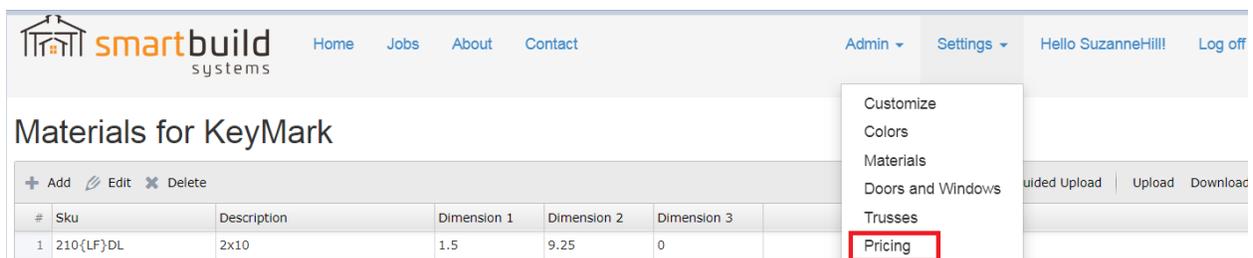
The pricing data includes the cost, markup, price and taxable status of each item in the database.

During this entire uploading/adding of material/trusses, the pricing data of each item could have been updated.

To update pricing data, there are three options;

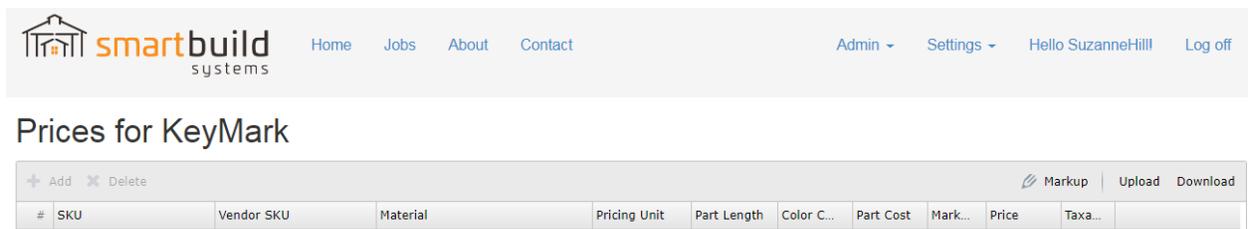
- Change pricing data directly in the PRICES page
- Using the EDIT MARKUP option on the PRICES page
- Upload new prices on the PRICES page

Navigate to the PRICES Page by selecting PRICING in the SETTINGS drop down menu.



The screenshot shows the SmartBuild Systems interface. At the top, there is a navigation bar with the logo, 'Home', 'Jobs', 'About', and 'Contact' links. On the right, there are links for 'Admin', 'Settings', 'Hello SuzanneHill!', and 'Log off'. The main content area is titled 'Materials for KeyMark'. Below the title, there are buttons for '+ Add', 'Edit', and 'Delete'. A table with columns for '#', 'SKU', 'Description', 'Dimension 1', 'Dimension 2', and 'Dimension 3' is visible. The 'Settings' dropdown menu is open, showing options like 'Customize', 'Colors', 'Materials', 'Doors and Windows', 'Trusses', and 'Pricing', with 'Pricing' highlighted in red.

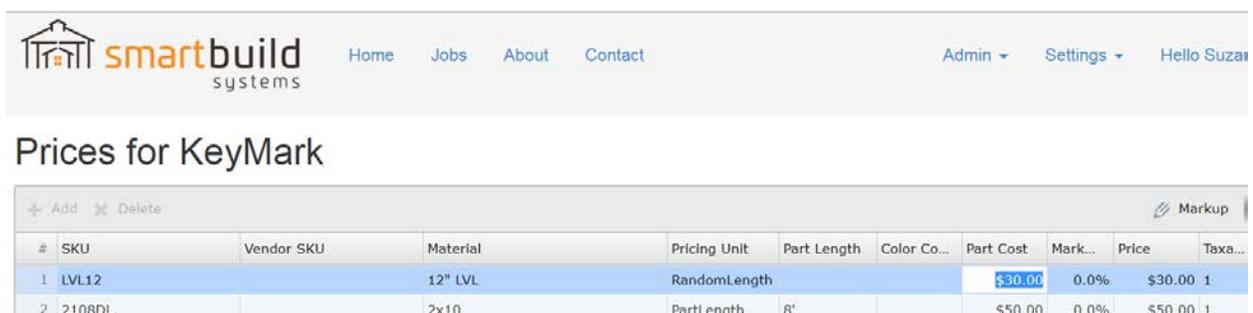
Once on the PRICES page you can choose any of the options listed above.



The screenshot shows the SmartBuild Systems interface. At the top, there is a navigation bar with the logo, 'Home', 'Jobs', 'About', and 'Contact' links. On the right, there are links for 'Admin', 'Settings', 'Hello SuzanneHill!', and 'Log off'. The main content area is titled 'Prices for KeyMark'. Below the title, there are buttons for '+ Add', 'Delete', 'Markup', 'Upload', and 'Download'. A table with columns for '#', 'SKU', 'Vendor SKU', 'Material', 'Pricing Unit', 'Part Length', 'Color C...', 'Part Cost', 'Mark...', 'Price', and 'Taxa...' is visible.

CHANGE PRICING DATA DIRECTLY ON SMARTBUILD WINDOW

After the PRICES page is displayed, double click the field (cost, price, markup or taxable status) you want changed. Once the existing data is highlighted, enter the new data.

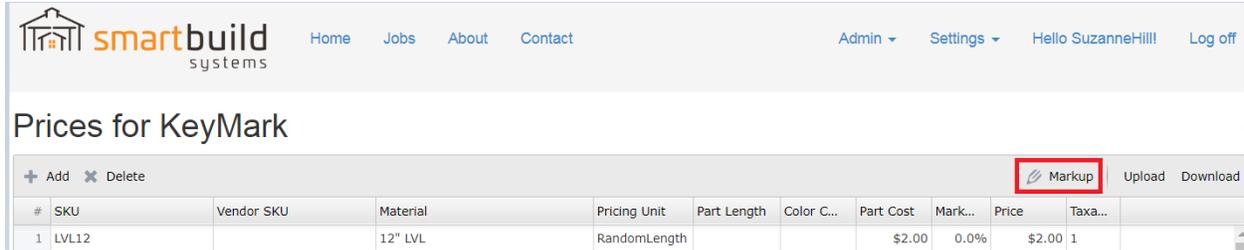


The screenshot shows the SmartBuild Systems interface. At the top, there is a navigation bar with the logo, 'Home', 'Jobs', 'About', and 'Contact' links. On the right, there are links for 'Admin', 'Settings', 'Hello Suzar', and 'Log off'. The main content area is titled 'Prices for KeyMark'. Below the title, there are buttons for '+ Add', 'Delete', and 'Markup'. A table with columns for '#', 'SKU', 'Vendor SKU', 'Material', 'Pricing Unit', 'Part Length', 'Color Co...', 'Part Cost', 'Mark...', 'Price', and 'Taxa...' is visible. The 'Part Cost' field for the first row is highlighted in blue.

#	SKU	Vendor SKU	Material	Pricing Unit	Part Length	Color Co...	Part Cost	Mark...	Price	Taxa...
1	LVL12		12" LVL	RandomLength			\$30.00	0.0%	\$30.00	1
2	2108DL		2x10	PartLength	8'		\$50.00	0.0%	\$50.00	1

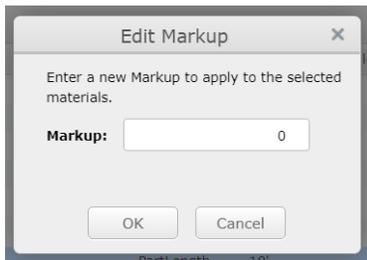
CHANGE PRICING DATA BY USING THE EDIT MARKUP OPTION

From the PRICES page, select the EDIT MARKUP button.



#	SKU	Vendor SKU	Material	Pricing Unit	Part Length	Color C...	Part Cost	Mark...	Price	Taxa...
1	LVL12		12" LVL	RandomLength			\$2.00	0.0%	\$2.00	1

The EDIT MARKUP dialog box will be displayed. Enter the new markup and click on OK. The new markup will be stored, and a new price will be calculated from the new markup value and the existing cost.



Edit Markup [X]

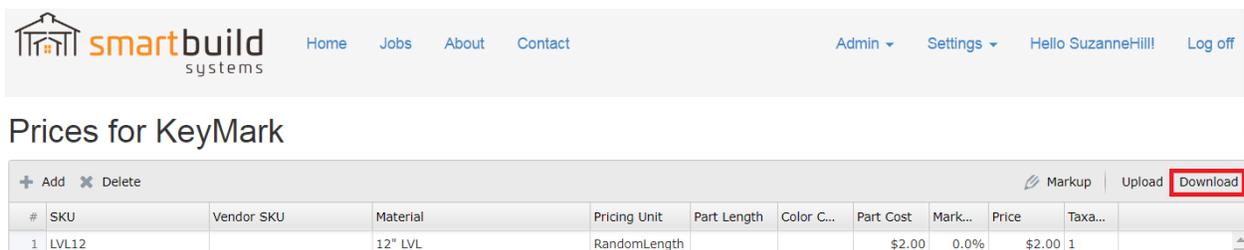
Enter a new Markup to apply to the selected materials.

Markup:

OK Cancel

CHANGE PRICING DATA BY UPLOADING A FILE

The third way to edit the pricing data is with the Basic Upload File option. This process begins with downloading the pricing data from SmartBuild. From the PRICES page, select the DOWNLOAD button.



#	SKU	Vendor SKU	Material	Pricing Unit	Part Length	Color C...	Part Cost	Mark...	Price	Taxa...
1	LVL12		12" LVL	RandomLength			\$2.00	0.0%	\$2.00	1

The CSV file will be downloaded to your computer. Edit the file, changing the price (markup, cost and/or taxable status data when appropriate) for every item needing a change.

	A	B	C	D	E	F	G	H	I	J	K
	Category	SKU	Vendor SKU	Material	Pricing Unit	Part Length	Color Code	Cost	Markup	Price	Taxable
1	Framing	LVL12	LVL12	12" LVL	RandomLength			\$2.00	0.00%	\$2.00	1
3	Framing	2108DL	2108DL	2x10	PartLength	8'		\$3.33	0.00%	\$3.33	1
4	Framing	21010DL	21010DL	2x10	PartLength	10'		\$4.17	0.00%	\$4.17	1
5	Framing	21012DL	21012DL	2x10	PartLength	12'		\$5.00	0.00%	\$5.00	1
6	Framing	21014DL	21014DL	2x10	PartLength	14'		\$5.83	0.00%	\$5.83	1

There are certain things to consider when changing the PRICING data.

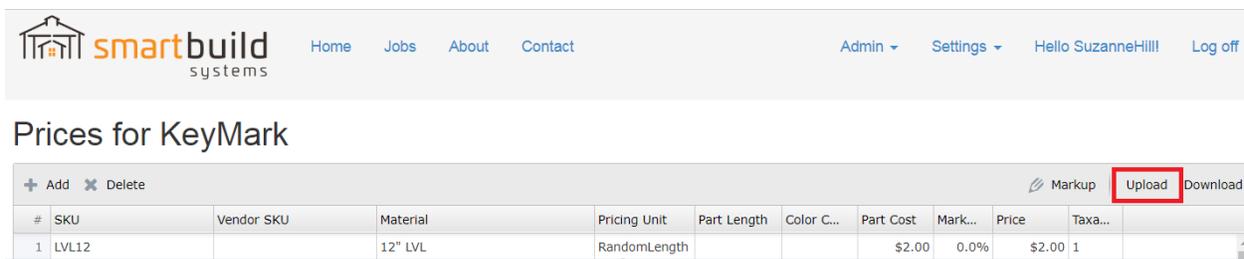
First, save a backup copy of the downloaded file, in case you determine that you've made major mistakes while changing the data. Hopefully you'll never need the backup, but it couldn't hurt to have one.

If you don't want to calculate the margin, delete the MARKUP column and just upload the COST/PRICE data. SmartBuild will calculate the margin based on the new cost/price.

If the upload file contains a new PRICE column ONLY, SmartBuild will change the COST to same value as PRICE, and set MARKUP to 0.

If you upload new COST/MARKUP data, SmartBuild will recalculate the PRICE based on that new data (even if a different PRICE is uploaded at the same time). The new MARKUP has priority over the PRICE.

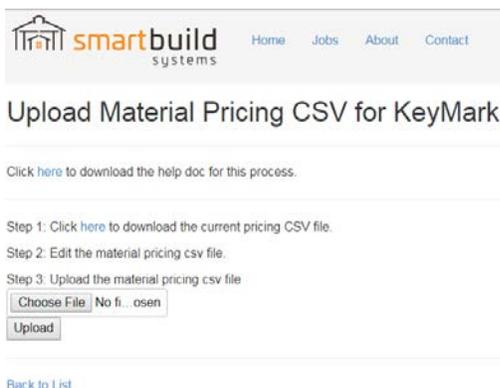
Save the file (retaining the CSV format), then re-upload the file to SmartBuild.



Prices for KeyMark

#	SKU	Vendor SKU	Material	Pricing Unit	Part Length	Color C...	Part Cost	Mark...	Price	Taxa...
1	LVL12		12" LVL	RandomLength			\$2.00	0.0%	\$2.00	1

The UPLOAD MATERIAL PRICING page will be displayed. Click on the CHOOSE FILE button, and choose the appropriate CSV file via Windows Explorer. Select UPLOAD.



Upload Material Pricing CSV for KeyMark

Click [here](#) to download the help doc for this process.

Step 1: Click [here](#) to download the current pricing CSV file.

Step 2: Edit the material pricing csv file.

Step 3: Upload the material pricing csv file

Choose File No files chosen

Upload

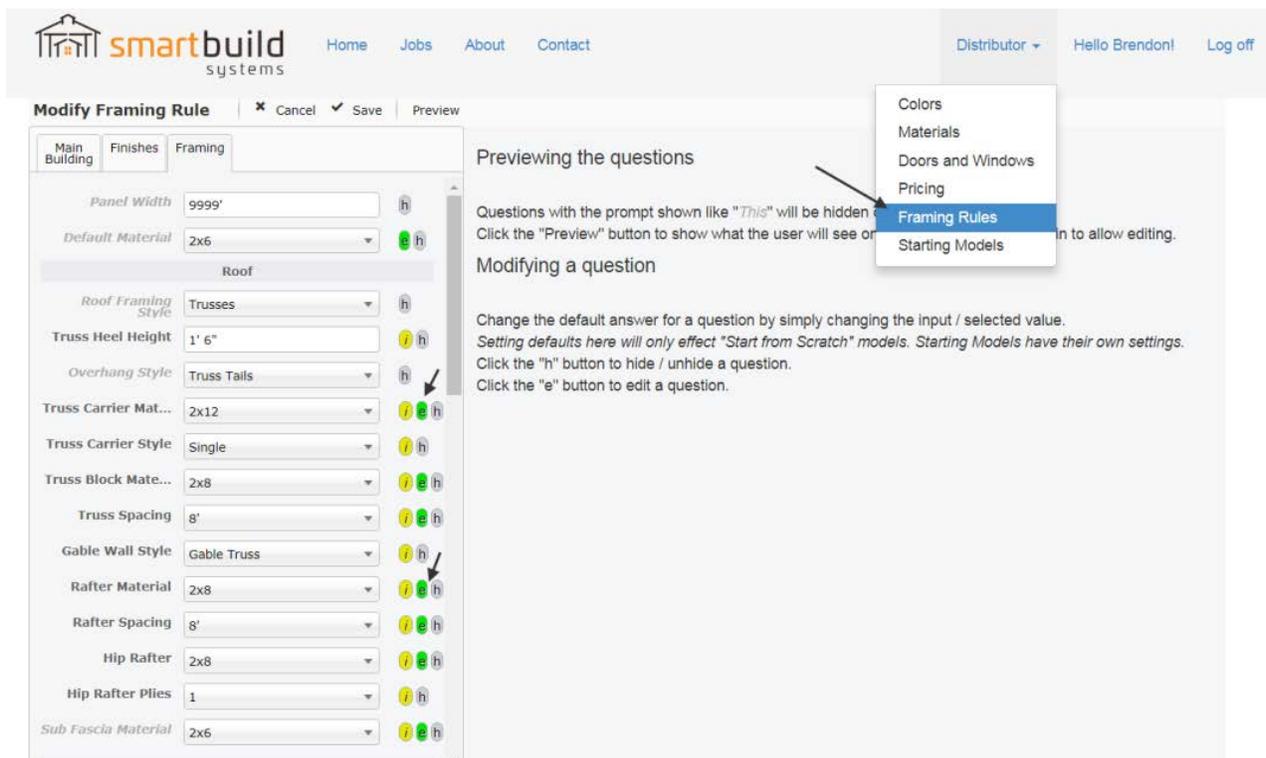
[Back to List](#)

When the upload is completed, SmartBuild will display the upload status. If successful, a message indicating the number of prices uploaded will be displayed. If not successful, SmartBuild will provide informative error messages to help identify the problem in the upload file.

Step 3: Define Framing Rules

Adding products to the material usages on the Framing Rules page

Once all the materials are loaded on the Materials Page the next step is to open the Framing Rules page. The Framing Rules is where the list of default materials is setup... Use the Framing Rules page to select all the answers to the questions listed on the main form that controls the 3D model on the right side of the screen. Framing Rules page has control buttons for each question. The green E button next to each question is used for editing the materials for that question. The gray H button will hide that question when you're in a 3D model. If the setting is something you never change, choose an answer and Hide the question, that way the answer cannot be changed when in the 3d model (you can always un-hide questions on the Framing Rules page if you want them to show up again).



Modify Framing Rule [Cancel] [Save] [Preview]

Main Building | Finishes | Framing

Panel Width: 9999' [h]

Default Material: 2x6 [h]

Roof

Roof Framing Style: Trusses [h]

Truss Heel Height: 1' 6" [h]

Overhang Style: Truss Tails [h]

Truss Carrier Mat...: 2x12 [h] [e]

Truss Carrier Style: Single [h]

Truss Block Mate...: 2x8 [h] [e]

Truss Spacing: 8' [h] [e]

Gable Wall Style: Gable Truss [h]

Rafter Material: 2x8 [h] [e]

Rafter Spacing: 8' [h] [e]

Hip Rafter: 2x8 [h] [e]

Hip Rafter Plies: 1 [h]

Sub Fascia Material: 2x6 [h] [e]

Previewing the questions

Questions with the prompt shown like "This" will be hidden. Click the "Preview" button to show what the user will see or click the "h" button to allow editing.

Modifying a question

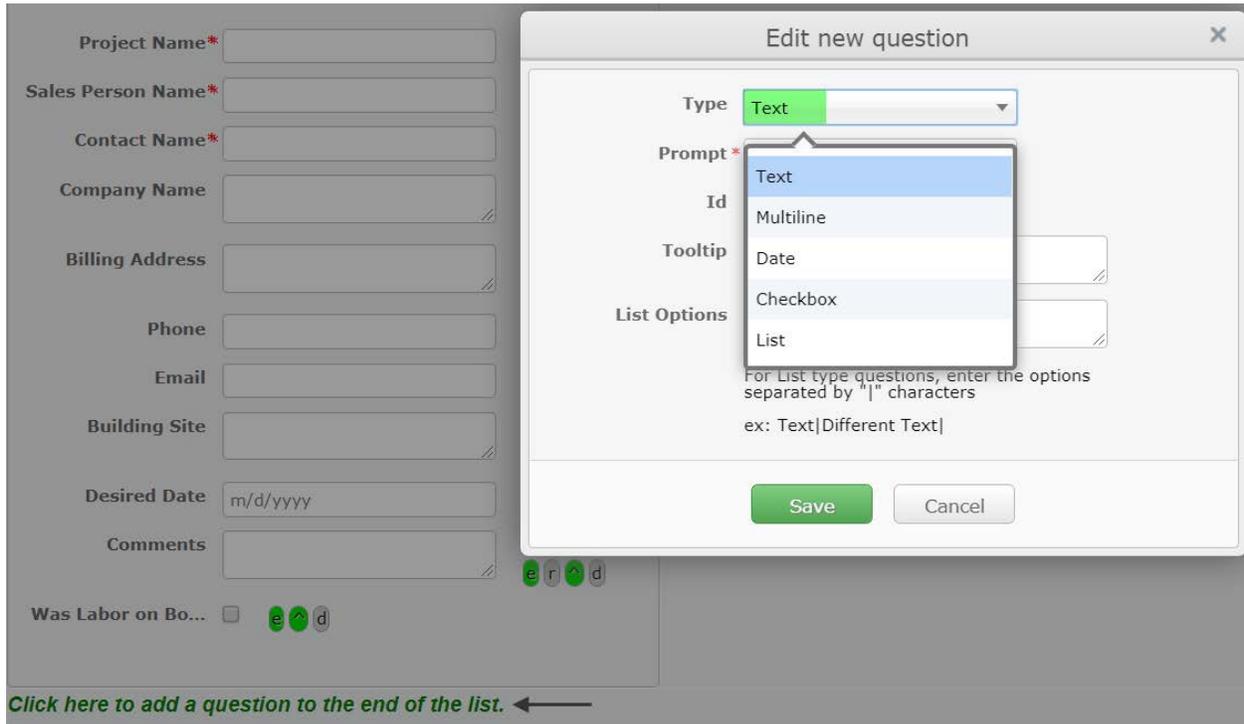
Change the default answer for a question by simply changing the input / selected value. Setting defaults here will only effect "Start from Scratch" models. Starting Models have their own settings. Click the "h" button to hide / unhide a question. Click the "e" button to edit a question.

Use the Framing Rules page to assign the default materials for things like framing, trim and sheathing parts. Just select the materials you want to use for each usage type and save the Framing Rules page. Then when you return to the Home page and select the Start from Scratch 3D model, all the default answers will be shown with the same answers that were saved in the Framing Rules. Note several different types of material options can be selected for each usage...

The first tab on the Framing Rules page is the Job tab. This tab is fully customizable, you can set it up with as many different job questions as you like. This is where the basic job information is gathered for each project. Use the fields to capture whatever job data that is important to you. The job info that gets

saved will show up on the cover pages on the outputs. Some Fields for important job information can be set to “required” by clicking on the gray R button next to that question.

Some of the different question fields you can use are: Text, Multi Line Text, Calendars, Check Boxes and Lists.



The screenshot shows the 'Edit new question' dialog box in the SmartBuild Systems interface. The dialog has a title bar with a close button (X). The main content area is divided into several sections:

- Type:** A dropdown menu with 'Text' selected.
- Prompt:** A text input field with a red asterisk indicating it is required.
- Id:** A text input field.
- Tooltip:** A text input field.
- List Options:** A dropdown menu with options: Text, Multiline, Date, Checkbox, and List. A tooltip is visible over this dropdown.

Below the List Options dropdown, there is a note: "For List type questions, enter the options separated by \"|\" characters" and an example: "ex: Text|Different Text|".

At the bottom of the dialog, there are two buttons: "Save" (green) and "Cancel" (gray).

In the background, a form is visible with fields for Project Name*, Sales Person Name*, Contact Name*, Company Name, Billing Address, Phone, Email, Building Site, Desired Date (m/d/yyyy), and Comments. There are also some small icons and a checkbox labeled "Was Labor on Bo...".

At the bottom left of the screenshot, there is a green link: "Click here to add a question to the end of the list." with an arrow pointing to the right.

Job Checks

Another feature on the front page of the Framing Rules page is the customizable job checks. These are limits that you can set in the Framing Rules that will show a message on the job, when a particular check gets triggered. The job checks are meant to be used along with the engineering and building standards for your region.

Here are some examples of the checks that you can set: max post spacing, truss heights and building widths. Let us know what other checks you would like to see...

Modify Framing Rule for Buildings
✕ Cancel ✓ Save Preview Help

Main Building
Finishes
Framing
Job

Project Name* ? e r d

Sales Person Name* e r d

Contact Name* e r d

Company Name e r d

Billing Address ? e r d

Phone e r d

Email ? e r d

Building Site e r d

Desired Date ? e r d

Comments e r d

Was Labor on Bo... e r d

Framing Rule Checks
New Framing Check
i

Formula ... d

Message

Comment

Formula ... d

Message

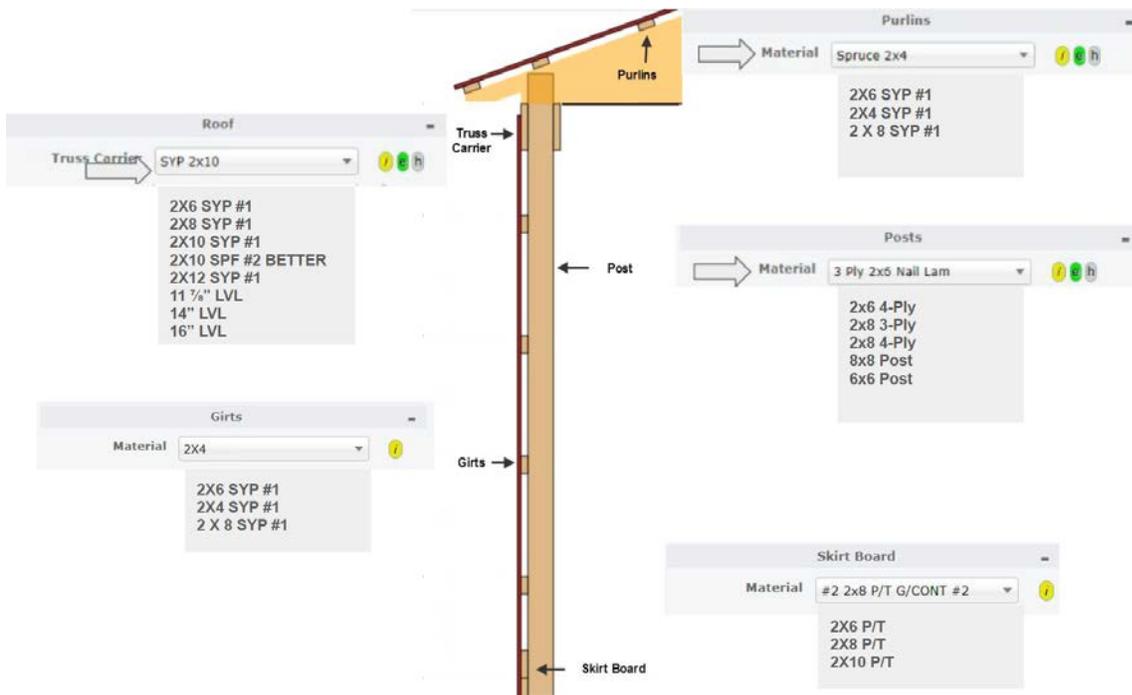
Comment

[Click here to add a question to the end of the list.](#)
←

Framing tab questions

- The truss carrier material, also known as the “header” or the “top girt” is the part where the trusses are attached to a wall.
- Truss carrier styles include Single, Double and Triple truss carrier;
 - Single style is one truss carrier on the outside of the post.
 - The double gives a single truss carrier on the inside and outside of the post and allows for truss spacing and post spacing to every
 - The triple truss carrier style is two on the inside and a single truss carrier on the outside of the post
- The truss block material is the vertical blocking on either side of the truss that attaches a truss to the truss carrier if there’s not a post underneath it.
- The truss spacing setting sets the center to center distance between the trusses this can be set from the front or back of every building.
- Rafters are used for the roof framing on porches and attached lean-tos. All roofs can also be framed with trusses instead of rafters.
- The hip rafter material is the rafter that’s running along the hip on a wraparound porch or lean-to.
- There are three options for the wall gable wall style...
 - Full height option has no trusses at the end of the building and the posts and girts run all the way up to the top of the roof.
 - Gable end is where there is a gable truss and the posts run all the way up to the roof line.
 - The gable short post option has the post stopping at the bottom of truss.
- Purlins style also have three types
 - The flat option lays flat on top of the truss.
 - The on edge will be in the strong axis on top of the trusses.
 - The flush options will cut around the purlins in between each truss and will mount flush with the top of the truss using hangers.
- Girts have two styles; standard and bookshelf that get cut in between the posts and laid flush with the inside and outside of the post
- The skirt-board material can be stacked and aligned with the building grade so that half the skirt-board is above grade and the other half is below grade.
 - You can also set the line of which the base trim will be set up in the bottom of the wall steel will sit.
- Roof ledger is the part where are the rafters for the attached building get tie into the wall of the main building.
- The open wall siding is used in conjunction with the open wall toggle on the building options tab. This controls how far down will the steel come on an open wall or if there is no steel on the wall.
- Use the Measure from option to determine where the offset will be measured from,
 - Bottom of Truss carrier
 - Or From Grade

Here are some example usages for the framing part questions:



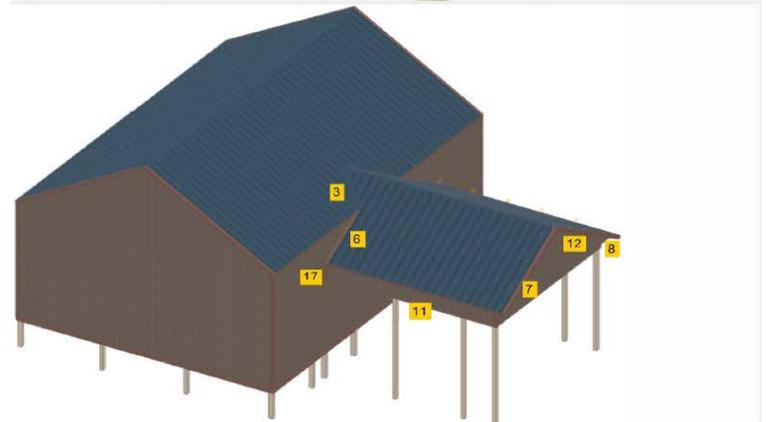
Finishes tab questions

The Finishes tab questions cover all the exterior steel parts of the building.

- Check on wainscoting for the default building
- Set the default colors and materials you want to use for the walls and the roof metal
- The rest of the Finishes tab questions have to do with all the different trim parts on the building...

And here are some SmartBuild usages for the trim parts:

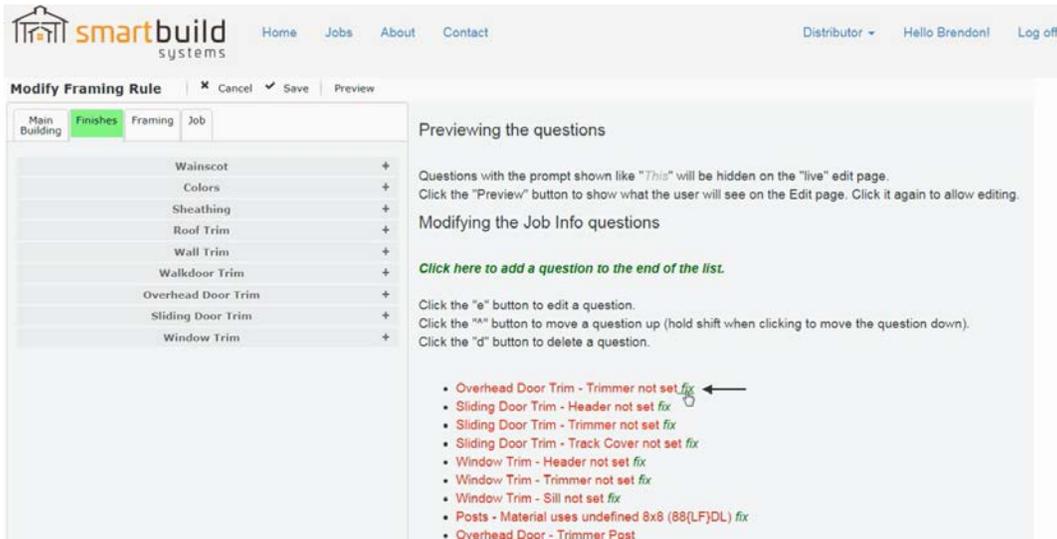
1	Ridge Cap	10	Base Trim
2	Hip Ridge Cap	11	Open Wall Base Trim
3	Valley Trim	12	Top of Wall Trim
4	Eave Edge Trim	13	Wainscot Trim
5	Gable Edge Trim	14	Door Header Trim
6	Roof To Wall Trim	15	Door Jamb Trim
7	Fascia Material	16	Window Sill Trim
8	Soffit Box Material	17	Inside Corner
9	Outside Corner		



Because the website is being continually updated there will be new settings and questions added.

Fixing new materials on the Framing Rules page

When a default material is deleted from the Framing Rules, or a new material usage is added to SmartBuild a Fix message will pop up on the Framing Rules Page. To fix the message, click on the Fix button and then select the correct materials you want to use for the new answer.



Modify Framing Rule [Cancel] [Save] [Preview]

Main Building | **Finishes** | Framing | Job

Wainscot +
Colors +
Sheathing +
Roof Trim +
Wall Trim +
Walkdoor Trim +
Overhead Door Trim +
Sliding Door Trim +
Window Trim +

Previewing the questions

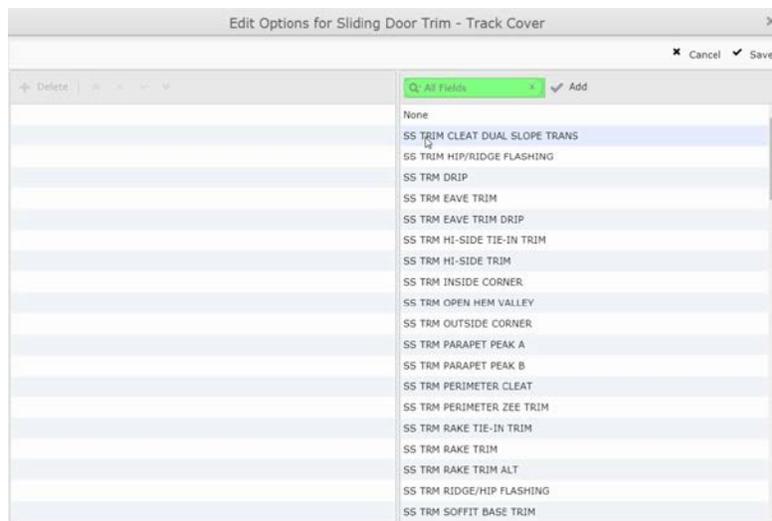
Questions with the prompt shown like "This" will be hidden on the "live" edit page. Click the "Preview" button to show what the user will see on the Edit page. Click it again to allow editing.

Modifying the Job Info questions

[Click here to add a question to the end of the list.](#)

Click the "e" button to edit a question.
Click the "m" button to move a question up (hold shift when clicking to move the question down).
Click the "d" button to delete a question.

- Overhead Door Trim - Trimmer not set **fix**
- Sliding Door Trim - Header not set **fix**
- Sliding Door Trim - Trimmer not set **fix**
- Sliding Door Trim - Track Cover not set **fix**
- Window Trim - Header not set **fix**
- Window Trim - Trimmer not set **fix**
- Window Trim - Sill not set **fix**
- Posts - Material uses undefined 8x8 (88(LF)DL) **fix**
- Overhead Door - Trimmer Post



Edit Options for Sliding Door Trim - Track Cover [Cancel] [Save]

[-] Delete [x] [x] [x] [x] [x]

Q: All Fields [x] [Add]

- None
- SS TRIM CLEAT DUAL SLOPE TRANS
- SS TRIM HIP/RIDGE FLASHING
- SS TRM DRIP
- SS TRM EAVE TRIM
- SS TRM EAVE TRIM DRIP
- SS TRM HI-SIDE TIE-IN TRIM
- SS TRM HI-SIDE TRIM
- SS TRM INSIDE CORNER
- SS TRM OPEN HEM VALLEY
- SS TRM OUTSIDE CORNER
- SS TRM PARAPET PEAK A
- SS TRM PARAPET PEAK B
- SS TRM PERIMETER CLEAT
- SS TRM PERIMETER ZEE TRIM
- SS TRM RAKE TIE-IN TRIM
- SS TRM RAKE TRIM
- SS TRM RAKE TRIM ALT
- SS TRM RIDGE/HIP FLASHING
- SS TRM SOFFIT BASE TRIM

Note: We post updates to the website every few weeks, some of these updates might change the functionality of the Framing Rules page. We'll post new training videos on our YouTube channel for any new features.

Let us know of any questions you might have or if you'd like to schedule an online training session to review the updates and cover some of the details Settings pages...

Step 4: Configure Packages

Introduction:

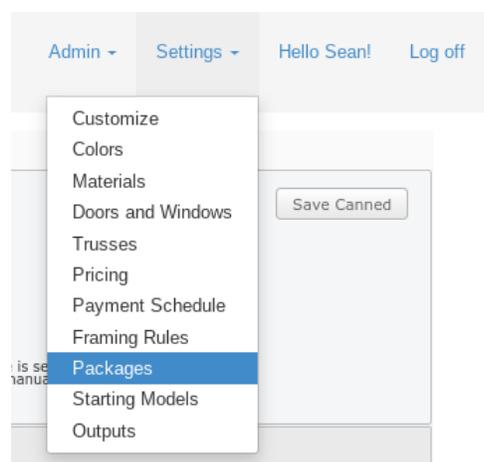
Sheathing, trim and framing members shown in the 3-d model will automatically be included in the material list and priced appropriately. You can also add materials from your catalog or as special order to any job. For everything else, SmartBuild uses Packages to call out materials and prices in a job. Packages are used to price things like insulation, interior liners, closures, bracing, screws, nails, horse stalls, labor, delivery and more.

Essentially, you choose a material from your material database and define a way to calculate, and add that material to any given job. A Package can contain one or many materials. You can have as many or as few packages as you like. Packages can also incorporate standard mathematical formulas using addition, subtraction, division and multiplication to calculate materials. Packages can also take advantage of job information like square footage, lineal footage, counts of members and many more options. And, packages can include questions to be input on a job by job basis, like dimensions of a concrete slab, to calculate cubic yards of concrete required for the specifications of a job.

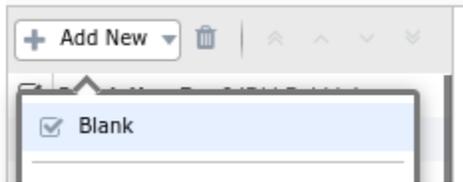
SmartBuild allows you to define packages in a way that makes sense for how you run your business. There are some standard Packages that SmartBuild will provide, but it will be your responsibility to make sure a full list of packages are set up in a way that works for your business.

Adding a Package:

Packages are created under Settings/Packages:



To add a new package select Add New and Blank.



You can also add a pre-defined SmartBuild Package from the list to your packages:



The pre-defined packages are included with SmartBuild as a starting point for many of the common types of packages, but they will require adjustments for your specific materials and practices.

Once you add a New or pre-defined package, you can select the Package and edit the properties of the package and add or edit materials.

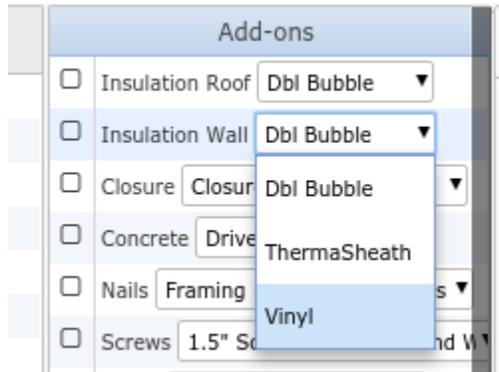
Before adding materials, you should define the properties of the package itself. The following section defines the properties inputs of a package:



This shows the properties of the selected package

Group Name: Packages can be grouped together. Any packages that have the same Group Name will be listed together under the Group Name as options to select from in a job.

In the example above, In a job, the two roof insulation material options ('DBL Bubble' and 'Reflective 125') will be grouped together under the 'Insulation Roof' Group Name. And, likewise, the three wall insulation material packages will be grouped together under the 'Insulation Wall' Group Name.



In a job, the drop down shows the three material packages grouped under 'Insulation Wall'.

In a job, you can select to turn on the Add-on for a job and you can choose one of the options from the roof and/or wall insulation groups to be added to the material list.

NOTE: You can only pick one item from a group (in this case you cannot select 'ThermaSheath' and 'Vinyl' from the list for wall insulation) to add to a job. If you need to have both 'Material A' and 'Material B' in a job at the same time then 'A' and 'B' cannot be under the same Group Name. In this example, the roof and wall insulation are not grouped together because we need the option to add roof insulation and/or wall insulation to a job. But, the different types of wall insulation can be grouped together, because we do not offer different types of insulation for walls in any given job.

Package Types: 'Packages' is a general term used in the program that refers to several types of packages. Add-on, Base Macro, Bundles and Options are types of 'Packages'.

You can designate a Package Type which will affect the behavior of the package within a job.

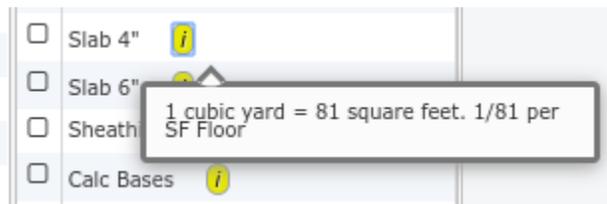
Add-on: Add-ons are a type of package that can be included or excluded on a job by job basis. If an Add-on is included in a job, then all materials for that Add-on will be added to the material list and added to the quote price. Note: the default is excluded, so Add-ons will need to be 'turned on' to be included in a job.

Base Macro: Base Macros are like Add-ons except they are automatically included in every job. There is no option to include or exclude per job, Base Macros are always included in every job. Typically, these are used for nails, screws and other materials that are included with every job and do not require the option to turn off according to job specifications.

Bundles: A bundle acts like an Add-on, except it is also shown as a single item in terms of pricing. So, if you create a Bundle called 'Workbench' that includes 2x4's and nails, the bundle will show a single total price for a 'Workbench' which is the sum of the individual materials. And, on the materials list, each material is listed as a separate material and added to the quote price. Bundles can be used to present sales bundles to a customer as a single line item price (like 'Workbench = \$399.95') with the individual material items that make up the 'Workbench' still on the material list as separate material items. Bundles are typically used when you want to present a single price to the end client and still have an itemized material list.

Options: Options are like Bundles except that an Option can also be shown on outputs with a total price and not added to the material list or total price of the quote. Options are a three way switch. Options can be 1. excluded from a job all together 2. Included in a job as a bundle (see Bundles definition above) or 3. Shown as a single price line item like a bundle but the materials are not included in the material list and not added to the total quote price. But, options can easily be added to a job as a bundle by clicking the checkbox for any given option. Options are typically used to present optional add-ons to the end client. For example, If your client has given specifications for a base building, and wants to consider adding the 'workbench', you can show the total price for the work bench as part of the original sales quote without affecting the price of the base building. If the client decides to add the work bench, then a single button click will add the option to the material list and quote price.

Info Text: The text entered here will be available in a job.



Info Text can be accessed by clicking on the 'i' button next to any given package in a job

Info Text is used to display notes, reminders and information for any package while modelling a job.

Adding Materials to a Package:

Once you define the Package information then you can add materials to the package and define how those materials will be calculated and added to a job. A package can have one or more materials, each material is added to a package one at a time. To add a material to a package, select Add Misc or Add Catalog.

Group Name
Package Name
Package Type
Info Text
 Define the products in the list below that will be added to the job when this Package is selected
 - or - leave the list below blank to define a manual checklist item that needs to be manually added to the job

+ Add Misc + Add Catalog Edit Copy Move

Add Misc: This will add a ‘miscellaneous’ material to the package, you define this material upon adding it to the package. NOTE: Adding a material this way will only be used for the package it is added to, it is not connected to your master material database in any way. It will not be updated based on changes to pricing or anything else connected to your master material database. This material exists only as part of this package.

Add Catalog: This option will you to use a material from your existing master material database. When you use Add Catalog, the selected material is tied directly to your material database and used in the package. So, if you update the price of a material in your master material database, then the updated price will be reflected when the package is used in a job.

Edit Added Material - Catalog

Category
Usage
Catalog Category
Catalog Item
SKU
Material
Calculation

Color
Cost
Price

This is the screen when Add Catalog is used to input a material into a package.

The terms below are in order of the Add Catalog input.

Category: Specify which material category the calculated material will be placed within a job's material list. For example, if this is a framing member then you can choose Lumber from the drop down list, if it is a labor calculation then you can choose the Labor category. Once this material is added to a job, it will be listed under the selected category on the material list.

Usage: This is used to describe how this material is used in a job and can be anything you want. The Usage will be added, along with the parent Package name, to the Usage column in the job's material list.

Catalog Category: Narrow down the list of available 'Catalog Items' based on the material category. If you are estimating a framing member, then choose the Lumber category to select from the available lumber products.

Catalog Item: Select a material from your material database. This is the specific material that will be calculated and added to a job's material list based on the calculation defined.

SKU: Internal program SKU for selected Catalog item (automatically entered by program based on Catalog Item selected)

Material: Description of the selected Catalog Item (automatically entered by program based on Catalog Item selected)

Calculation: Formulas can be defined here to calculate quantities of the Catalog Item selected. You can use program data to help calculate material take offs, for example, square foot of roof or wall, lineal feet of different types of trim and quantities of things like trusses or posts. You can use standard addition, subtraction, multiplication and division to calculate materials. You can also incorporate questions into calculations that will prompt the user for inputs to use in the calculation when added to a job (see Example 4 below for more details).

Color: For materials with colors in the material database, this will allow you to select a color option for the material. You can either choose an exact color based on your color list, or match the roof or wall or trim color of the main building, or if you select 'Calc Base' then the program will apply the appropriate color based on the method of calculating the materials; for example, if you use 'SF of Wall Sheathing' in the calculation then the material will match the wall colors, even if you have more than one wall color in a job.

Cost: Cost of selected material from the material database (automatically entered by program based on Catalog Item selected)

Price: Cost of selected material from the material database (automatically entered by program based on Catalog Item selected)

NOTE ON MATERIALS

In order to estimate a material from your master material database, you need to first have the material added to your SmartBuild material database. See **Step 2: Setting up Material Databases** for more information on loading materials.

The way a material is entered into the system will affect how an Add-on is set up. If you set the price of a material by the roll (or box or bag...) then the Add-on will need to figure how many rolls are needed for a given job. To figure this, you need to find out what percentage of a roll is used based on your selected 'Calc Base', such as square foot of wall. If you don't want the program to call out a roll or box etc. but instead just want the lineal footage or square footage of material per job, then you would price the material based on square foot or lineal foot (not per roll, box....). So, if a 100 foot roll cost \$100 dollars, then the material would be priced as \$1.00 to get a cost per lineal foot. So, the way a material is priced needs to coordinate with the way you want to report and estimate the material.

EXAMPLES

A few considerations when creating a package:

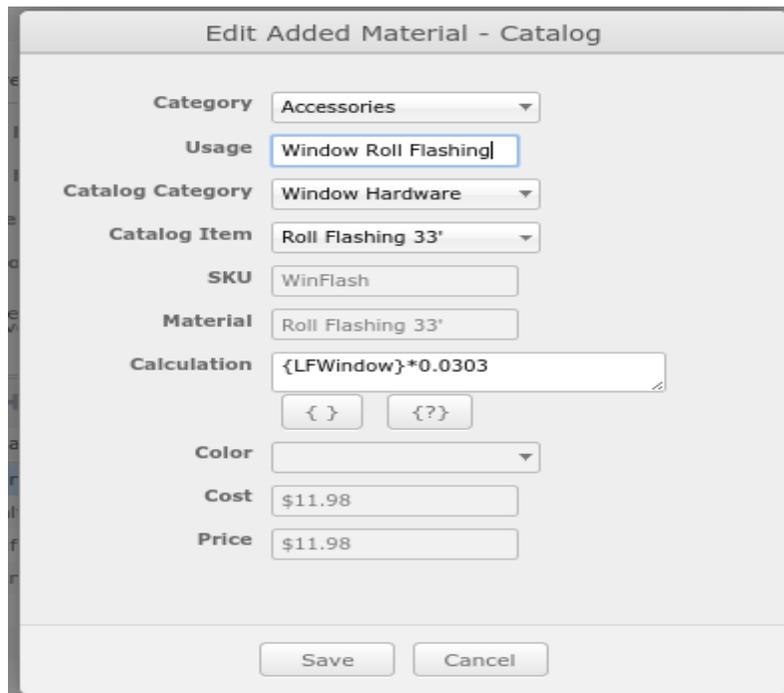
1. Should this package be part of a Group? What materials make sense to group together under one package and which ones need to be separated into their own packages?
2. What type of package should this be? Add-on, Base Macro, Bundle or Option.
3. How is the material priced? Is it per roll, or by lineal foot? Is it priced as a box of nails or by individual nail?
4. Do you want the program to calculate the number of boxes, like 3 boxes of 1000 nails, or individual counts like 3000 nails?
5. Is the material based on lineal foot material or square footage or cubic yards?

The answer to the above questions and more will determine how a package is set up and what calculations are used.

Example 1: Estimate per roll based on Lineal foot

Let's say you use a roll on waterproof flashing for all windows. You need to have a material in your database to use. In your database, you add a 33' roll of flashing priced per roll in your 'Window Hardware' category. In this case, you want to figure out how many rolls to send out to any given job. So you create a 'Base Macro' to account for this flashing material. In this case, the best Calc Base available is 'Lineal Foot of Window Trim'. So, how do we figure out how many 33' rolls we need per job?

If you want to use 1 lineal foot of flashing for each 1' of window trim then you can use this formula: 1 lft divided by 33' of flashing (= .0303).



The screenshot shows a dialog box titled "Edit Added Material - Catalog". It contains several fields for configuring a material:

- Category:** Accessories
- Usage:** Window Roll Flashing
- Catalog Category:** Window Hardware
- Catalog Item:** Roll Flashing 33'
- SKU:** WinFlash
- Material:** Roll Flashing 33'
- Calculation:** {LFWindow}*0.0303
- Color:** (empty dropdown)
- Cost:** \$11.98
- Price:** \$11.98

At the bottom are "Save" and "Cancel" buttons.

You could also use the calculation of: $\{LFWindow\} * (1/33)$, which would give the same result as the above calculation.

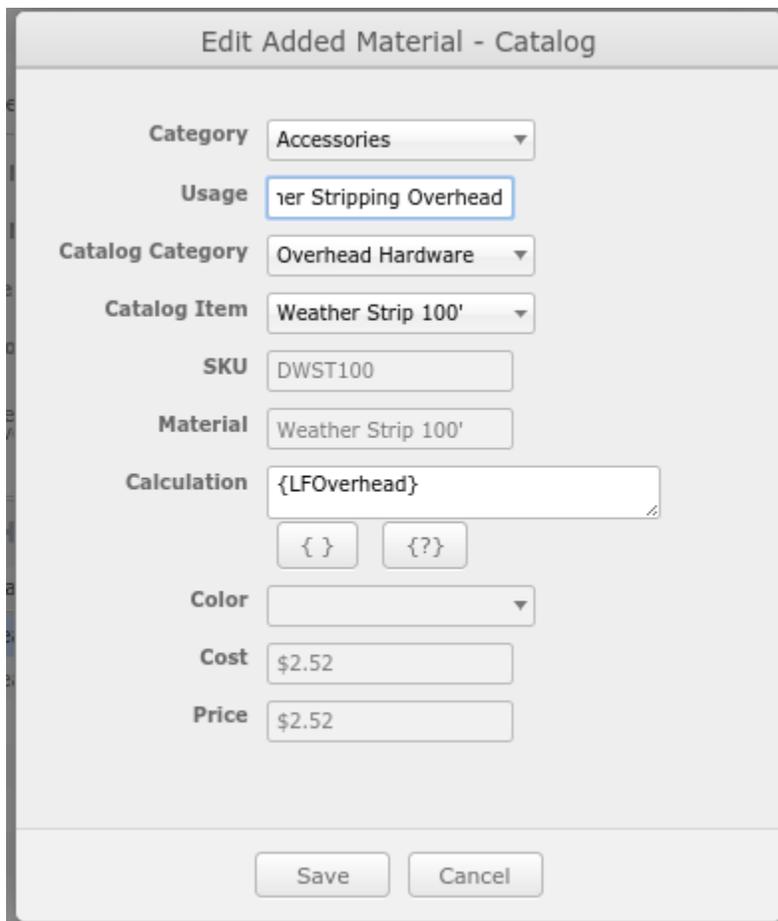
This means for every lineal foot of window trim for a given job, you will get 1 foot of window flashing, **but** it will only report the number of rolls required for the material take off. If a job has less than 33 lineal feet of window trim then one roll of 'Roll Flashing 33'' will be included and priced on the material take-off. As the lineal feet of window trim increases so does the number of rolls, but only when it reaches a point that requires a new roll. So, 33' will require 2 rolls (the program will round up when exactly 33'). 65' will require 2 rolls. 66' will require 3 rolls etc.

You can build waste factors into the calculations. For example, one way to handle this is to add 10% to the lineal footage of trim and then figure out the material based on actual lineal footage plus a 10% waste factor. The calculation would look like: $((\{LFWindow\} * .1) + \{LFWindow\}) * .0303$. This calculation finds 10% of the lineal footage of trim and then adds the actual lineal footage of window trim and then figures out how many rolls are required based on the waste adjusted lineal footage.

This is one example, but the same principles can apply to any type of material where you need to find the quantity of rolls, or bags or boxes to send out per lineal foot of something.

Example 2: Priced per lineal foot (not per roll,box...)

Let’s assume instead of figuring out the number of rolls to send out, you want a number of actual lineal footage required and priced per lineal foot (not per roll). In this case, you would set the cost of the material in your material catalog by the cost of material per lineal foot in a roll. If a roll of 100’ costs \$252.00 then the cost in your material catalog would be \$2.52 per lineal foot. In this case, you want one lineal foot of flashing for every lineal foot of window trim.



The screenshot shows a form titled "Edit Added Material - Catalog" with the following fields and values:

- Category: Accessories
- Usage: 1er Stripping Overhead
- Catalog Category: Overhead Hardware
- Catalog Item: Weather Strip 100'
- SKU: DWST100
- Material: Weather Strip 100'
- Calculation: {LFOverhead}
- Color: (empty dropdown)
- Cost: \$2.52
- Price: \$2.52

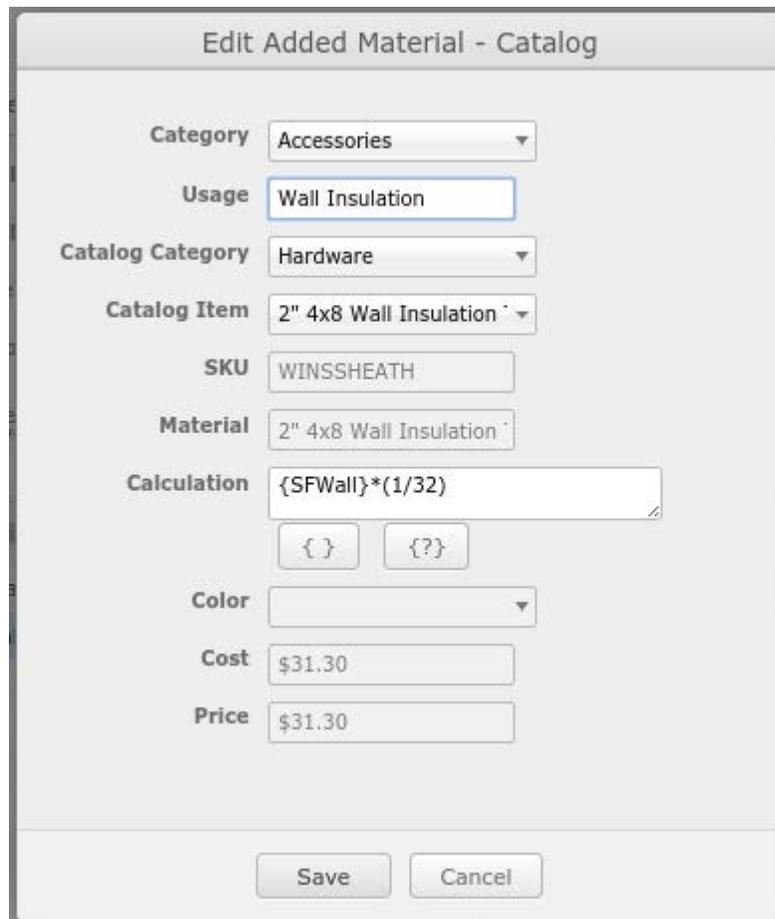
Buttons for "Save" and "Cancel" are located at the bottom of the form.

The 100’ roll is priced per lineal foot.

In the above example, the Calculation is just Lineal Footage of Overhead door trim, so one foot of weather strip for every lineal foot of overhead trim. The results per job on the material take-off will show the actual lineal footage required and it will give a price of the material per lineal foot.

Example 3: Materials based on Square Footage

Using square footage as a Calc Base is similar to using lineal footage, except you need to figure out the total coverage of the material. For example, let's say you use a 4x8 insulation panel to insulate walls and you want the program to figure out how many panels you need for any given job. In the material database, you would add a 4x8 insulation panel with the cost/price per panel. Under packages, you would create an Add-on to account for this material. In this case, square footage of wall sheathing is a good Calc Base to use to figure out how many sheets are required. To do this you need to figure out the coverage of one sheet, so $4 \times 8 = 32$ square foot per panel. Then you need to tell the program how much of a sheet is required for one square foot of wall sheathing. This calculation is $1/32$.



Edit Added Material - Catalog

Category: Accessories

Usage: Wall Insulation

Catalog Category: Hardware

Catalog Item: 2" 4x8 Wall Insulation

SKU: WINSSHEATH

Material: 2" 4x8 Wall Insulation

Calculation: $\{SFWall\} * (1/32)$

Color: [Empty]

Cost: \$31.30

Price: \$31.30

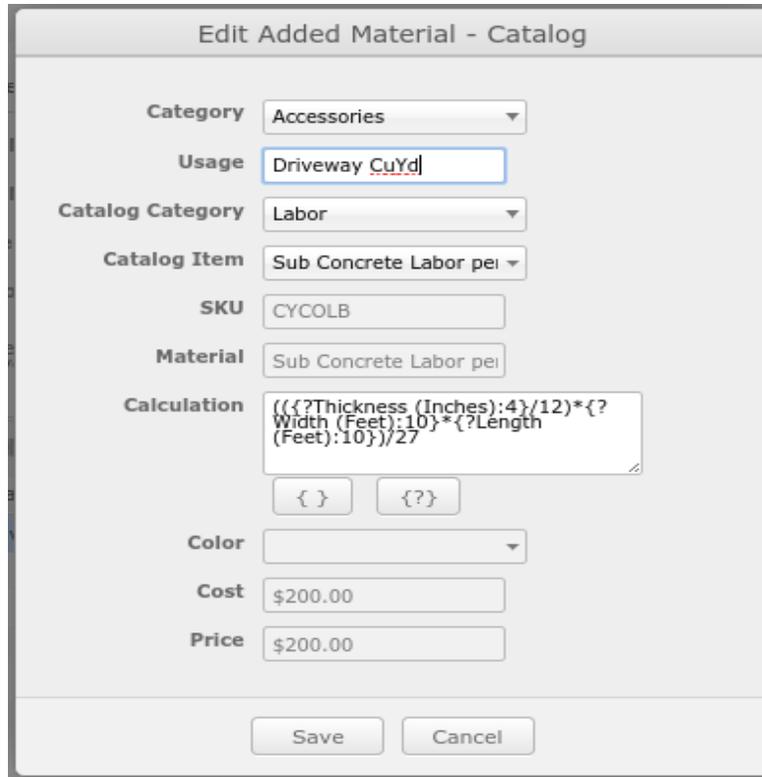
Buttons: Save, Cancel

In this example, the program will calculate how many sheets are required for any given job based on the job's total square foot of wall sheathing. The program will round up, but basically, for every 32 square foot of wall sheathing, the program will report 1 sheet of wall insulation. 330 square feet of wall sheathing would report 11 sheets.

Example 4: Finished floor cubic yards to square foot with questions

For slabs, since we are using the square footage of floor in the program, we need to convert cubic yards to square feet. You could create a material under the Foundation category of '1 cubic yard of concrete' with a cost/price for 1 cubic yard of concrete.

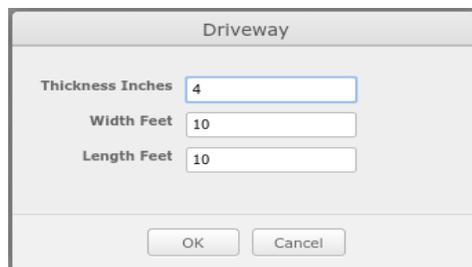
You can add questions within a calculation to prompt a user of the program to enter job specific information to use in the calculation when applied to a job. Here is a sample set up to calculate:



The calculation: $((\{?Thickness (Inches):4\}/12)*\{?Width (Feet):10\}*\{?Length (Feet):10\})/27$

Using this calculation, the program will prompt the user to enter a Thickness, Width and a Length. It will then calculate square footage and divide by 27 to get cubic yards and add the number of cubic yards to the quote with a price per cubic yard.

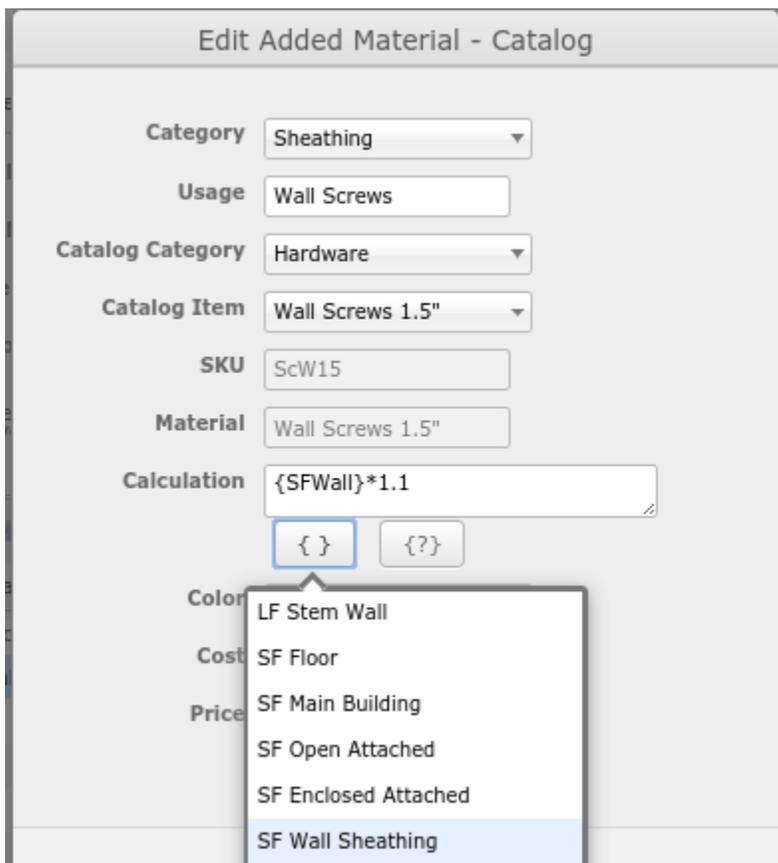
When the driveway is added to a job, the questions will be presented like this:



The program will calculate the cubic footage of concrete based on the answers to the Driveway questions. The defaults in this case are defined as 4, 10 and 10 but can be changed in a job.

Example 5: Screws

Screws generally follow similar principles as above. If you want a count of screws per square foot of roof or wall sheathing then the calculation is pretty easy. In the Calculation, you just add “SF of wall Sheathing’ and multiply by the desired amount of screws per square foot of wall sheathing. If you use ‘1’ as the multiplier then you will get 1 screw for every square foot of wall sheathing. If you use 2 then you will get 2 screws for every square foot, if you use .5 then you will get ½ a screw for every 1 square foot (though you can’t get half a screw so it is more accurate to say you will get 1 screw for every two square feet). You can increase or decrease the amount per square foot as you like.



The screenshot shows a software interface titled "Edit Added Material - Catalog". The form contains the following fields:

- Category:** Sheathing (dropdown)
- Usage:** Wall Screws (text input)
- Catalog Category:** Hardware (dropdown)
- Catalog Item:** Wall Screws 1.5" (dropdown)
- SKU:** ScW15 (text input)
- Material:** Wall Screws 1.5" (text input)
- Calculation:** {SFWall}*1.1 (text input)

Below the Calculation field, there are two buttons: one with curly braces {} and one with curly braces and a question mark {?}. A dropdown menu is open below the {} button, listing the following options:

- LF Stem Wall
- SF Floor
- SF Main Building
- SF Open Attached
- SF Enclosed Attached
- SF Wall Sheathing (highlighted)

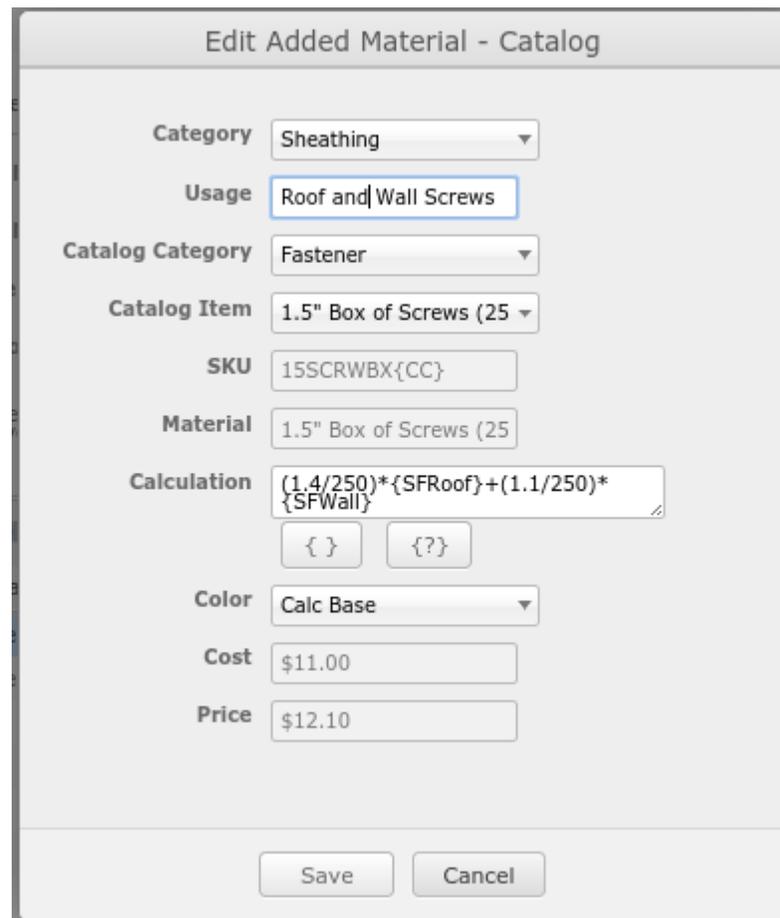
Example of getting 1.1 screws for every square foot of wall sheathing

Calculating screws per square foot to get a count of the number of boxes is a bit more difficult.

Here is a formula that you can use:

The number of screws per square foot you want to use, divided by the total number in a box, multiplied by the actual square footage in the job.

In the example below, we are using the same screw for roof and wall so the calculation combines roof and walls screws into one calculation. For this example, there are 250 screws per box, for the roof I used 1.4 screws for every square foot, divided by 250 and multiplied that by the actual square footage of wall sheathing. For the walls I used 1.1 screws per square foot. I added the roof and walls screws together to get a total number of boxes required for roof and wall screws. If the screw count is under 250 then I will have one box called out on the material list, if it is 250-499 then I will have two boxes and so on.



The screenshot shows a dialog box titled "Edit Added Material - Catalog" with the following fields and values:

- Category:** Sheathing
- Usage:** Roof and Wall Screws
- Catalog Category:** Fastener
- Catalog Item:** 1.5" Box of Screws (25)
- SKU:** 15SCRWBX{CC}
- Material:** 1.5" Box of Screws (25)
- Calculation:** $(1.4/250)*\{SFRoof\}+(1.1/250)*\{SFWall\}$
- Color:** Calc Base
- Cost:** \$11.00
- Price:** \$12.10

Buttons for "Save" and "Cancel" are located at the bottom of the dialog.

For trim screws, you can estimate based on square footage similar to the example above. You can also use the extensive list of different types of trim lineal footage to get a count. Using similar techniques as above, you can specify a multiplier based on lineal footage.

Example 6: Nails

You can also use similar methods for nails as screws depending on how you want to calculate the counts. With nails you may be more likely to use other data to calculate quantities. For example, for girt nails, you could use # of post, along with the building ceiling height to calculate a quantity of girt nails. If you figure the number of girt nails per lineal foot of post (in the example below I used .25 girt nails per lineal foot of post) and then multiply that by the ceiling height (so a 14' post * .25 would be 3.5 nails per post) and then multiply that by the total number of posts in the job. The calculation would look something like:

Edit Added Material - Catalog

Category	<input type="text" value="Accessories"/>
Usage	<input type="text" value="Main Building Girt Nails"/>
Catalog Category	<input type="text" value="Fastener"/>
Catalog Item	<input type="text" value="Gun Nails Box 3"/>
SKU	<input type="text" value="NailBox3"/>
Material	<input type="text" value="Gun Nails Box 3"/>
Calculation	<input type="text" value="({MainBuildingCeilingHeight})*.25) * {Post}/1000"/> <input type="button" value="{ }"/> <input type="button" value="{?}"/>
Color	<input type="text"/>
Cost	<input type="text" value="\$69.39"/>
Price	<input type="text" value="\$69.39"/>

In this case, I am using a box of 1000 nails so the equation is divided by 1000 to get the number of boxes.

For purlins, you could use a multiplier based on the '# of trusses' if you nail the purlins to the trusses. If you drop the purlins flush with the trusses then you could use '# of purlins' with a multiplier to figure the number of hangers required, for example.

Package Name Save Canned

Package Type

Info Text

Define the products in the list below that will be added to the job when this Package is selected
- or - leave the list below blank to define a manual checklist item that needs to be manually added to the job

+ Add Misc + Add Catalog ↻ Edit ✕ Delete | ⬆ ⬇ ⬅ ⬇ | Copy Move

Usage	SKU	Material	Length	Calc Base	Qty
Girt Nails Exterior	NailBox3"	Gun Nails Box 3"		SFWall	0.004
Purlin Nails	NailBox3"	Gun Nails Box 3"		SFRoof	0.004
Skirt Board Nails	PNail35GIV	Pole Nail 3 1/2 Galv		LFBBase	0.018
Truss to Post Nails	PNail4	Pole Nail 4"		Truss	0.3
Header Nails	PNail4	Pole Nail 4"		Post	0.004
Windows Nails	CapNail1.51	Cap Nails 1 1/2 #1		Window	0.096

Example of a nail Base Macro with multiple types of nails calculated in different ways.

Recommendations (do's and don'ts):

Below is a list of recommendations for Packages.

- DON'T create a Group if there's only one package. This simply confuses the user by implying that they have a choice.
- DON'T repeat the Group name in each Package. This just wastes space in the interface.
- DON'T require the user to select or type in a qty that is available as a calc base. If the user has a chance to answer a question wrong, they will.
- DO use the calc bases and the if function liberally. This is particularly helpful when there are scenarios like varying labor rates for different ranges of square footage.
- DON'T use Miscellaneous materials with prices in your packages. By adding a Material to your database, all pricing changes can be handled in one place. You can use Miscellaneous entries when you just want to verify a quantity (see the tip below about "dummy" entries).
- DON'T make the group names or package names too long. Test the package to make sure none of the text is getting truncated.
- DO include Info Text, especially if you needed to shorten the name. This is also useful for "checklist" packages, to explain to the user what they should be looking for.
- DON'T add ? to the end of a question. It won't appear in the dialog.
- DO test each package by turning it on for a job. This will uncover any syntax errors in the calculation.
- DO add "dummy" entries for each of the calc bases used in a calculation when testing a package. This will allow you to verify that the calc base is giving the number you think it should. Make sure you remove these when you're done, so you don't confuse users.
- DO arrange your calculations so that you can easily tell what they're supposed to be doing. Instead of $\{SFRoof\} * 0.002$ for a product that is 4' wide and 125' long, use $\{SFRoof\} / (4 * 125)$. You WILL look at this in 6 months and scratch your head.
- DO make sure your familiar with ALL of the available calc bases. The best way to do this is to add the Calc Bases default package and review the items it adds to your Accessories. It's also a good idea to delete this package and re-add it each time we update the web site, since we are adding new calc bases all the time. As with "dummy" entries, remove this package when you're done.
- DO let us know if there's a calc base you'd like to have. We can usually get these added in a week or so.

Example:

- Ext Wall and Framing Labor
(BAD way: three grouped packages with one entry each)
- Ext Wall and Framing Labor--1500SF
FrameExterior1500 {SFFloor} \$2.65
- Ext Wall and Framing Labor--2500SF
FrameExterior2500 {SFFloor} \$2.25
- Ext Wall and Framing Labor--MORE than 2500SF
FrameExterior2500M {SFFloor} \$2.00

Why is it a bad method? User must select the correct one based on the total sq footage of the building.

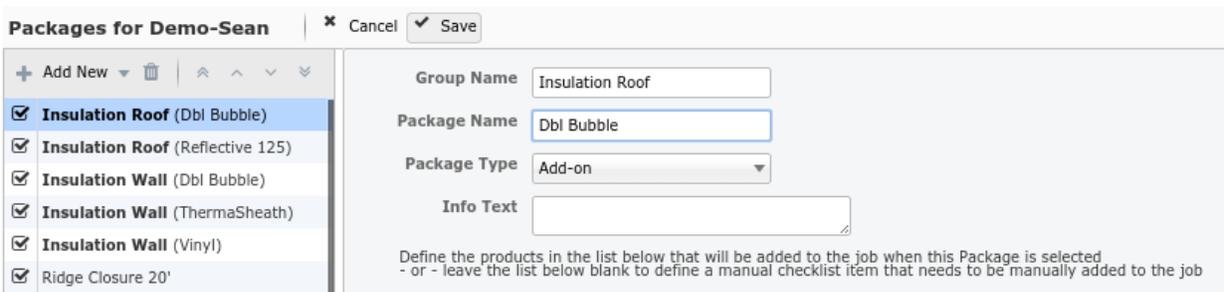
- Ext Wall and Framing Labor
(Recommended: one package with three entries controlled by sq footage of the job)
- FrameExterior1500 if({SFFloor}<=1500,{SFFloor},0) \$2.65
- FrameExterior2500 if(and({SFFloor}>1500,{SFFloor}<=2500),{SFFloor},0) \$2.25
- FrameExterior2500M if({SFFloor}>2500,{SFFloor},0) \$2.00

Why is this method recommended? This will automatically use the correct labor rate, even if the building sq footage changes.

Conclusion:

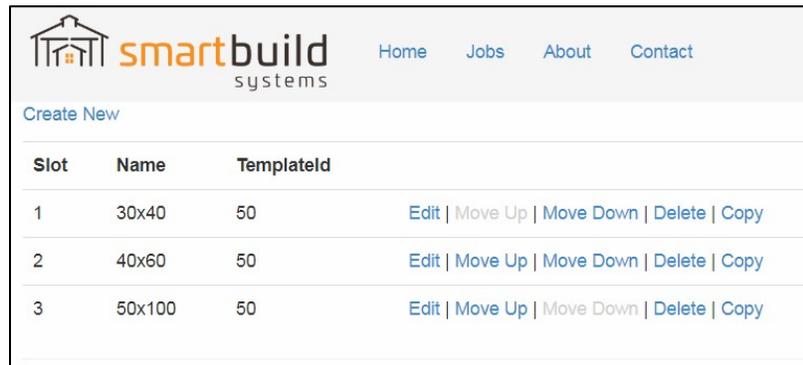
Packages take some preparation and may require some trial and error testing. You can always add, edit and delete, so feel free to do some experimenting and checking jobs for accurate material counts. You can model a typical base model or a 100 x 100 model and check the Material Lists and outputs and change and adjust the materials, pricing or the packages to get numbers that work for your purposes. If you need additional help, please call our help line or send us an email. Also, we can add more Calc Bases, so if you do not see a Calc Base that you would like to use then please let us know.

Note: Make sure to hit 'Save' before you exit the Packages input screen if you have made any changes to any of the packages!



Step 5: Setup Model Templates Library

In the SmartBuild Templates Library, you will create a collection of models that your customers can use as a starting point for creating their own custom designs. These models are displayed on the Home Page visited by your customers. Models can differ in their size, framing rules, building styles, and basic materials. There is no limit to the number of model templates you can create.

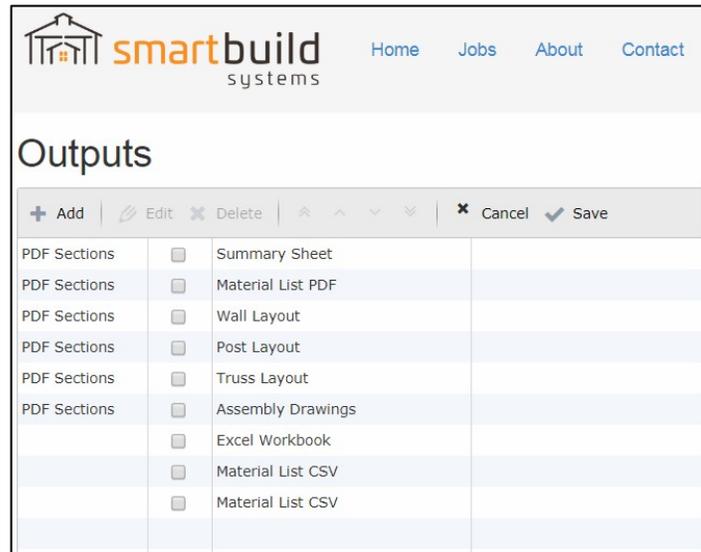
A screenshot of the SmartBuild Systems web interface showing a table of model templates. The interface includes a header with the logo and navigation links, a "Create New" button, and a table with columns for Slot, Name, TemplateId, and a list of actions (Edit, Move Up, Move Down, Delete, Copy).

Slot	Name	TemplateId	
1	30x40	50	Edit Move Up Move Down Delete Copy
2	40x60	50	Edit Move Up Move Down Delete Copy
3	50x100	50	Edit Move Up Move Down Delete Copy

We are currently working on expanding this section.

Step 6: Customize Outputs

The process of setting up your SmartBuild outputs is dedicated to the customization of your materials lists, layout diagrams, assembly diagrams and other materials. Outputs can be provided in PDF, Excel, Word, DXF, and Sketchup formats.



We are currently working on expanding this section.

While you're waiting you can watch some SmartBuild Training Videos.

[SmartBuild Systems - Customize output lists and file types - Duration: 2 minutes..](#)

[SmartBuild Systems - Configure Material Lists - Duration: 6 minutes, 20 seconds.](#)

[SmartBuild Systems - Customize Document Outputs - Duration: 6 minutes, 17 seconds.](#)