Step 2: Setup 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:	ANCILLARY Material:
Framing	Walk Door
Sheathing	Overhead Door
Trim	Slider
	Windows
	Cupola (uploaded to Accessories tab)
	Foundation
	Hardware
	Walk Door Hardware
	Overhead Door Hardware
	Slider Hardware
	Window Hardware
	Cupola Hardware
	Connector
	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.*

Exporting Material Lists from Existing Software (Exported Source List/File)

An important step for gathering material data for SmartBuild is to retrieve any lists from the software currently in use (e.g. Maestro, PostFrameManager, 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 source file/list will be used as the basis for extracting and reformatting the data needed by SmartBuild.

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:

Category – Category of material, using the spelling required by SmartBuild
Material/Description - A brief but informative description of each specific material.
SKU – SmartBuild SKU generated with Vendor SKU, and possibly Linear Feet and Color.
Full SKU – SmartBuild will generate this SKU.
Vendor SKU – (optional) your company's internal SKU / Part # or other ID used to designate this part. This column is not required. However, it can provide a useful link between the SmartBuild SKU and the Vendor SKU used elsewhere.
Taxable – Indicator of taxable status (0-nontaxable, 1-taxable)
Weight – decimal weight of item, used to calculate the weight of the order so shipping can be estimated.

Category (required)	Material (required)	SKU (required)	Vendor SKU (optional)	Taxable (required)	Weight (required)
Framing	Material in predefined length++	xx.....xx{LF}	xx.....xx	0 or 1	Blank, 0 or :
Framing	Material by the foot (random)	create new or copy from Vendor SKU+	xx.....xx	0 or 1	Blank, 0 or :
Sheathing	Material by the foot (random)++	xx.....xx{CC}*	xx.....xx	0 or 1	Blank, 0 or :
Sheathing	Material in predefined part length++	xx.....xx{LF}{CC}*	xx.....xx	0 or 1	Blank, 0 or :
Trim	Material in predefined part length++	xx.....xx{LF}{CC}*	xx.....xx	0 or 1	Blank, 0 or :
Trim	Material by the foot (random) ++	xx.....xx{CC}*	xx.....xx	0 or 1	Blank, 0 or :
WalkDoor	Material/Description	create new or same as Vendor SKU+	xx.....xx	0 or 1	Blank, 0 or :
Overhead	Material/Description	create new or same as Vendor SKU+	xx.....xx	0 or 1	Blank, 0 or :
Slider	Material/Description	create new or same as Vendor SKU+	xx.....xx	0 or 1	Blank, 0 or :
Window	Material/Description	create new or same as Vendor SKU+	xx.....xx	0 or 1	Blank, 0 or :
Cupola	Material/Description	create new or same as Vendor SKU+	xx.....xx	0 or 1	Blank, 0 or :
Foundation	Material/Description	create new or same as Vendor SKU+	xx.....xx	0 or 1	Blank, 0 or :
Hardware	Material/Description	create new or same as Vendor SKU+	xx.....xx	0 or 1	Blank, 0 or :
WalkDoorHardwa	Material/Description	create new or same as Vendor SKU+	xx.....xx	0 or 1	Blank, 0 or :
OverheadHardwa	Material/Description	create new or same as Vendor SKU+	xx.....xx	0 or 1	Blank, 0 or :
SliderHardware	Material/Description	create new or same as Vendor SKU+	xx.....xx	0 or 1	Blank, 0 or :
WindowHardware	Material/Description	create new or same as Vendor SKU+	xx.....xx	0 or 1	Blank, 0 or :
CupolaHardware	Material/Description	create new or same as Vendor SKU+	xx.....xx	0 or 1	Blank, 0 or :
Connector	Material/Description	create new or same as Vendor SKU+	xx.....xx	0 or 1	Blank, 0 or :
Fastener	Material/Description++	xx.....xx{CC}*	xx.....xx	0 or 1	Blank, 0 or :
Labor	Material/Description	create new or same as Vendor SKU+	xx.....xx	0 or 1	Blank, 0 or :

ADDITIONAL DATA NEEDED FOR SELECT CATEGORIES

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, rounded down to the nearest foot

        (leave blank if not a Base material, or material is sold by the foot)

    Color Code – ColorCode 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")

        Part Length – length of part in decimal feet (leave blank if material is sold by the foot)

        Color Code – ColorCode 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 (leave blank if material is sold by the foot)

        Color Code – ColorCode 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 – ColorCode from the Color List, when applicable

Below is a layout of the **additional** data needed for each category (except the truss category).

Category (required)	Dim 1	Dim 2	Dim 3	Part Length	Color Code
Framing	ACTUAL Width in inches	ACTUAL Depth in inches	(leave blank)	length in feet	(leave blank)
Framing	ACTUAL Width in inches	ACTUAL Depth in inches	(leave blank)	(leave blank, if sold by the foot)	(leave blank)
Sheathing	Coverage Width in inches	Actual Width in inches	standingseam / corrugated / agpanel	(leave blank, if sold by the foot)	Color Code
Sheathing	Coverage Width in inches	Actual Width in inches	standingseam / corrugated / agpanel	length in feet	Color Code
Trim	Reveal width in inches	Thickness in inches	(leave blank)	length in feet	Color Code
Trim	Reveal width in inches	Thickness in inches	(leave blank)	(leave blank)	Color Code
WalkDoor	Opening Width in feet	Opening Height in feet	OBJ for 3D Model	(leave blank)	(leave blank)
Overhead	Opening Width in feet	Opening Height in feet	OBJ for 3D Model	(leave blank)	(leave blank)
Slider	Opening Width in feet	Opening Height in feet	OBJ for 3D Model	(leave blank)	(leave blank)
Window	Opening Width in feet	Opening Height in feet	OBJ for 3D Model	(leave blank)	(leave blank)
Cupola	Length/Width in inches	Height in inches	roof pitch	(leave blank)	(leave blank)
Foundation	(leave blank)	(leave blank)	(leave blank)	(leave blank)	(leave blank)
Hardware	(leave blank)	(leave blank)	(leave blank)	(leave blank)	(leave blank)
WalkDoorHardwa	(leave blank)	(leave blank)	(leave blank)	(leave blank)	(leave blank)
OverheadHardwa	(leave blank)	(leave blank)	(leave blank)	(leave blank)	(leave blank)
SliderHardware	(leave blank)	(leave blank)	(leave blank)	(leave blank)	(leave blank)
WindowHardware	(leave blank)	(leave blank)	(leave blank)	(leave blank)	(leave blank)
CupolaHardware	(leave blank)	(leave blank)	(leave blank)	(leave blank)	(leave blank)
Connector	(leave blank)	(leave blank)	(leave blank)	(leave blank)	(leave blank)
Fastener	(leave blank)	(leave blank)	(leave blank)	(leave blank)	Color Code
Labor	(leave blank)	(leave blank)	(leave blank)	(leave blank)	(leave blank)

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 information 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

## Format of Material Upload File (except Trusses)

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

Creating the MATERIALS & DOORS/WINDOWS Upload File Template:
From the SmartBuild Home Page select MATERIALS from the SETTINGS dropdown menu.
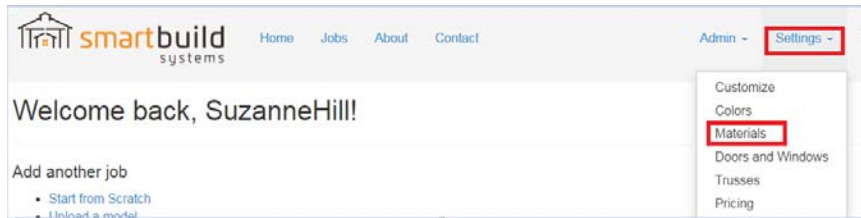
From the MATERIALS (or DOORS/WINDOWS) page, select the DOWNLOAD option.
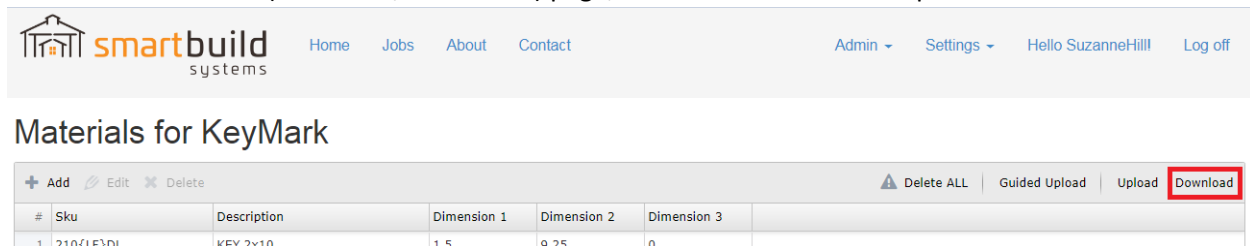
A file named "Materials-CompanyName" will be saved in your DOWNLOADS folder. Use this as the template for your upload file. If the database had any default data in it, you should delete this data from the file template, AND delete the entries individually in SmartBuild. The upload process will NOT delete an entry in the SmartBuild database.

Category	SKU	Vendor SKU	Material	Dim 1	Dim 2	Dim 3	Part Length	Color Code	Cost	Price	Taxable	Weight
Connector	HANGER01	HANGER01	NAILS PURLIN HANGER						$10.00	$20.00	1	0
Cupola	C24	C24	KEY 2' x 2' Square Cupola	24	18	4			$144.00	$144.00	1	0
CupolaHardware	WV-BEAR-30	WV-BEAR-30	Weathervane BLACK BEAR 30						$10.00	$20.00	1	0
WalkDoor	3068	3068	3'w x 6' 8"h KEY Walk Door	3	6.6667				$100.00	$100.00	1	0
Fastener	1.510Hex	1.510Hex	1 1/2" #10 Hex						$12.00	$12.00	1	0
Fastener	FAST{CC}	FASTBG	Screws					BG	$12.00	$12.00	1	0
Foundation	PCL5	PCL5	KEY 5' PermaColumn						$12.00	$12.00	1	0
Framing	LVL12{LF}	LVL1216	KEY 12" LVL	2	12		16		$30.00	$33.00	1	32
Framing	210{LF}DL	21010DL	KEY 2x10	1.5	9.25		10		$6.00	$6.00	1	20
Framing	212DL	212DL	2x12 (sold by the foot)	1.5	11.25				$8.00	$8.40	1	0
Hardware	OSB5848	OSB5848	OSB						$10.00	$11.00	1	0
Overhead	100100	100100	10'w x 10'h KEY Overhead	10	10				$500.00	$550.00	1	0
OverheadHardware	1165	1165	LiftMaster Model DT-75-11						$875.00	$962.50	1	0
Sheathing	CR26{CC}	CR26CR	26 ga Corrugated	36	37.5	standingseam		CR	$2.05	$2.26	1	0
Sheathing	CR{LF}{CC}	CR10LFWT	Sheathing by the Sheet	36	37.5	standingseam	10	WT	$40.00	$44.00	1	0
Sheathing	CR{LF}{CC}		Sheathing by the Sheet	36	37.5	corrugated	14	*	$40.00	$44.00	1	0
Slider	SLIDER -10x10	SLIDER -10x10	10x10 Slider	10	10				$1,000.00	$1,100.00	1	0
SliderHardware	BACCENGUIST	BACCENGUIST	CENTER GUIDE & STOP						$10.00	$11.00	1	0
Trim	DT10{LF}{CC}	DT1010CR	KEY 10 7/8" Overhead Door Trim	10.875	1.5	0	10	CR	$5.44	$5.98	1	0
Trim	FA12{LF}{CC}	FA1210CR	KEY 12" Fascia	12	0	0	10	CR	$6.00	$6.60	1	0
Trim	FA3{LF}{CC}	FA310CR	KEY 3" Fascia	3	0	0	10	CR	$1.50	$1.65	1	0
Trim	FA3{LF}{CC}		KEY 3" Fascia	3	0	0	10	*	$1.50	$1.65	1	0
Trim	PT5{LF}{CC}	PT510CR	KEY 5 1/2" Post Trim	1.5	0	0	10	CR	$0.75	$0.83	1	0
Trim	BF{LF}{CC}	BF10CR	KEY Flat Base	1.5	0	0	10	CR	$0.75	$0.83	1	0
Trim	BF{CC}	BFCR	KEY Flat Base BY THE FOOT	1.5	0	0		CR	$0.75	$0.75	1	0
WalkDoorHardware	LOCK-EZ-2K/K	LOCK-EZ-2K/K	ADVANTAGE-KNOB/KNOB ENTRY						$10.00	$20.00	1	0
Window	2040	2040	2'w x 4'h KEY Window	2	4				$40.00	$40.00	1	0
WindowHardware	SHUT-15X63-BLK	SHUT-15X63-BLK	SHUTTERS 15X63 VINYL - BLACK						$10.00	$20.00	1	0

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.

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
WalkDoor
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).

Category	SKU	Full SKU	Vendor SKU	Material	Dim 1	Dim 2	Dim 3	Part Length	Color Code	Cost	Price	Taxable	Weight
Foundation	PCL5	PCL5	PCL5	KEY 5' PermaColumn						$12.00	$12.00	1	0
Window	2040	2040	2040	2'w x 4'h KEY Window	2	4				$40.00	$40.00	1	0
Window	3040	3040	3040	3'w x 4'h KEY Window	3	4				$60.00	$60.00	1	0

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.

Preparing Material List for Upload (except Trusses)

Using the downloaded "Materials-CompanyName" 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 source file/list discussed earlier 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 source file/list. There won't be a one to one correspondence between the columns in the two files (the exported source file/list, and the new upload file). You will probably need to extract the data from certain columns in the exported source file/list, and distribute the data to the appropriate columns in the new file.

SKUs

There are 3 SKUs listed: **SKU, Full SKU, Vendor SKU**. The only SKU that you are required to include is **SKU** (which will sometimes be referred to in this document as the SmartBuild SKU). SmartBuild uses this SKU to populate/expand material in the database. The **Full SKU** is an internal SKU that SmartBuild will generate using the SmartBuild SKU and length/color code data you provided. In fact, if you put data in the Full SKU column it will be ignored. However, we'll continue to show it in the examples. One important thing about the SmartBuild generated Full SKU is that it may indicate materials with duplicate SKUs (which can cause issues). The **Vendor SKU** is not required, but it can provide a helpful link between the SmartBuild system and other software systems you may use (for accounting, inventory, ordering, etc).

If there is a **Vendor SKU** in the exported source file/list it can be used as the basis for the SmartBuild **SKU**. For all categories **except framing, sheathing, trim and fasteners,** the Vendor SKU can simply be copied to the SmartBuild **SKU**.   Additional information may be needed to create the new SmartBuild SKU for the exceptions mentioned (framing, sheathing, trim and fasteners).

To make the document a little easier to understand, we'll assume that a pre-existing Vendor SKU will be used as the base for creating the SmartBuild SKU. However, as I've already mentioned this isn't

required. If you don't have (or want to use) Vendor SKUs, you can generate the SmartBuild SKU from scratch. You can come up with your own structure as long as you follow the guidelines below:

Don't use < > and &

Only use the strings {LF} or {CC} in the SKU when appropriate (to designate length or color)

SKUs can be informative, if you use the right structure for your material. If you don't currently have a Vendor SKU structure, below are some "best practices" (however these are **NOT** SmartBuild requirements).

Make your SKUs easy to understand (consider dimensions, size, type, color, etc)

Arrange words according to importance (category, size, color, etc)

Only use relevant Information

Don't use letters that look like numbers, spaces, accents or symbols.

Only use alphanumeric characters (substituting – or _ for spaces is a great option)

Start SKUs with letters (helpful when using in spreadsheets)

Keep SKUs short (but with enough info to be relevant)

PRICING DATA DURING MATERIAL UPLOAD:

The pricing data includes the cost, markup, price and taxable status of each item in the database. This data can be included when uploading the material list.

There is usually a one to one mapping with **Cost** and **Price** columns from the exported source file/list to the new upload file that you're creating. However you may need to watch out for a change in pricing units (e.g. switching from price/item to price/foot). The Cost/Price data can be included when uploading the material list. Or you can wait until later to populate the Cost/Price data.

Markup can be defined or left out.

Taxable status is a usually straight forward, and required during the material upload.

ADDING FRAMING MATERIAL TO THE MATERIAL UPLOAD FILE

Framing material has several defining parameters (width, depth, length). The exported source file/list may be formatted so this information is in separate field. However sometimes the data may be embedded in a field (such as Vendor SKU, description), requiring the exact data needed to be extracted. For Example:

- Material Description is *"2x6 8' DL"*. Dim 1, Dim 2 and Part Length data can be extracted from the description in the exported source file/list. Please note that 2 and 6 are nominal dimensions, and SmartBuild needs actual dimensions (1.5 and 5.5) for framing material.

- Vendor SKU is *"0204LVL10"* indicating 2x4 10' LVL. Dim 1, Dim 2 and Part Length data can be extracted from the Vendor SKU. In the case of LVL, 2 and 4 are the actual dimensions.

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

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.

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.

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	Price	Taxable	Weight
Framing	LVL12{LF}	LVL1216	LVL1216	KEY 12" LVL 16'	KEY 12" LVL	2	12		16		$30.00	$33.00	1	32
Framing	210{LF}DL	2108DL	2108DL	KEY 2x10 8'	KEY 2x10	1.5	9.25		8		$50.00	$50.00	1	16
Framing	212{LF}DL	21214DL	21214DL	KEY 2x12 14'	KEY 2x12	1.5	11.25		14		$7.00	$7.00	1	28
Framing	88{LF}DL	8818DL	8818DL	KEY 8x8 18'	KEY 8x8	7.25	7.25		18		$24.00	$24.00	1	0

* 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

SKU for Framing Material with Random Length:

The SmartBuild 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	Price	Taxable	Weight
Framing	LVL12	LVL12	LVL12	KEY 12" LVL (BY THE FOOT)	KEY 12" LVL (BY THE FOOT)	2	12				$4.00	$4.40	1	2
Framing	212DL	212DL	212DL	2x12 sold by the foot	2x12	1.5	11.25				$8.00	$8.40	1	0
Framing	88DL	88DL	88DL	KEY 8x8 sold by the foot	KEY 8x8	7.25	7.25				$24.00	$24.00	1	0

* 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

Additional Data as defined for the Framing Category:

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)

Dim 3 – (leave blank)

Part Length – length of part in decimal feet, rounded down to nearest foot

(leave blank if material is sold by the foot)

Color Code – (leave blank)

Cost – Current Cost (with/without dollar sign), 0 or Blank

Markup – cost to price markup percentage
Price – Current Price (with/without dollar sign), 0 or Blank
Taxable – Indicator of taxable status (0-nontaxable, 1-taxable)
Weight – weight of item, used to calculate the weight of the order so shipping can be estimated

When the framing list is complete, upload the file to SmartBuild. Follow the directions in the ***Adding/Uploading Material (except Trusses)*** paragraph.

ADDING SHEATHING TO THE MATERIAL UPLOAD FILE

Sheathing can be sold by the foot (Random Length), by the sheet (Fixed Part Length), and in multiple colors. The SmartBuild SKU definition is determined by each of these defining factors.

SKU for Sheathing in Random Length (SmartBuild SKU to be built with {CC} token):
> If there isn't a color associated with the Sheathing,
>> then the Vendor SKU can simply be copied to the SmartBuild SKU.
> If there is a color associated with the Sheathing, 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.
>> 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.
>> 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.

For sheathing that comes in a variety of colors, SmartBuild requires that each piece be defined with every available color. One way to accomplish this is to manually enter duplicate entries with the different color codes of each available color into the upload file (e.g. 1 piece that comes in 10 colors will result in 10 different pieces entered into the upload file. Another way is to use the **wildcard (*)** in the color code. This feature makes it possible for you to manually enter only one item in your upload file (with the wildcard in the color column), and SmartBuild will do the work of expanding the item for every color.

Category	SKU	Full SKU	Vendor SKU	Original Description*	Material	Dim 1	Dim 2	Dim 3	Part Length	Color Code	Cost	Price	Taxable	Weight
Sheathing	CR26{CC}	CR26CR	CR26CR	KEY 26 ga Corrugated - Cranberry Red	KEY 26 ga Corrugated	36	37.5	standingseam		CR	$2.05	$2.26	1	0
Sheathing	CR26{CC}	CR26RR	CR26RR	KEY 26 ga Corrugated - Really Red	KEY 26 ga Corrugated	36	37.5	corrugated		RR	$2.05	$2.26	1	0
Sheathing	CR26{CC}	CR26BG	CR26BG	KEY 26 ga Corrugated - Beige	KEY 26 ga Corrugated	36	37.5	agpanel		BG	$2.05	$2.26	1	0
Sheathing	CR26{CC}			KEY 26 ga Corrugated - Beige	KEY 26 ga Corrugated	36	37.5	agpanel		*	$2.05	$2.26	1	0

> * 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

SKU for Sheathing sold by Fixed Part Length (SmartBuild SKU to be built with {LF} & {CC} tokens):
> Generating the SmartBuild SKU for Sheathing sold by the fixed Part Length is complicated by the fact that both Linear Feet and Color Code need to be used. Follow both processes described 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	Price	Taxable	Weight
Sheathing	CR{LF}{CC}	CR10LFWT	CR10LFWT	Sheathing by the 10' sheet - White	Sheathing by the Sheet	36	37.5	standingseam	10	WT	$40.00	$44.00	1	0
Sheathing	CR{LF}{CC}	CR12LFWT	CR12LFWT	Sheathing by the 12' sheet - White	Sheathing by the Sheet	36	37.5	standingseam	12	WT	$40.00	$44.00	1	0
Sheathing	CR{LF}{CC}	CR14LFWT	CR14LFWT	Sheathing by the 14' sheet - White	Sheathing by the Sheet	36	37.5	corrugated	14	WT	$40.00	$44.00	1	0
Sheathing	CR{LF}{CC}			Sheathing by the 14' sheet - White	Sheathing by the Sheet	36	37.5	corrugated	14	*	$40.00	$44.00	1	0

> * 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

Additional Data as defined for the Sheathing Category:

        Dim 1 – Coverage width in decimal inches

        Dim 2 – Actual width in decimal inches

        Dim 3 – used to show texture in model (standingseam, corrugated or agpanel)

                If Dim 3 is invalid, the sheathing will appear smooth in the model.

        Part Length – length of part in decimal feet, rounded down to nearest foot

                (leave blank if material is sold by the foot)

        Color Code – ColorCode from the Color List, when applicable (or * for all)

        Cost – Current Cost (with/without dollar sign), 0 or Blank

        Markup – cost to price markup percentage

        Price – Current Price (with/without dollar sign), 0 or Blank

        Taxable – Indicator of taxable status (0-nontaxable, 1-taxable)

        Weight – weight of item, used to calculate the weight of the order so shipping can be estimated

When the sheathing list is complete, upload the file to SmartBuild. Follow the directions in the ***Adding/Uploading Material (except Trusses)*** paragraph.

ADDING TRIM TO THE MATERIAL UPLOAD FILE

Trim can be sold by the piece (Fixed Part Length), by the foot (Random Length), and in multiple colors. The SmartBuild SKU is determined by each of these factors.

Trim material has several defining parameters (reveal width, thickness, length, color). The exported source file/list may be formatted such that this information is in separate fields. However sometimes the data may be embedded in a field (such as Vendor SKU, description), requiring the exact data needed to be extracted. For Example:

- Material Description is "J CHANNEL 10'3" SMOKE GRAY" – Part Length and Color Code data can be extracted from the description in the exported source file/list. The Color List will be used to get the Color Code for "SMOKE GRAY".

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

Generating the SmartBuild SKU for Trim is complicated by the fact that both Linear Feet and Color Codes may be used. Follow both processes described 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	Price	Taxable	Weight
Trim	DT10{LF}{CC}	DT1010CR	DT1010CR	KEY 10 7/8" Overhead Door Trim - Cranberry Re	KEY 10 7/8" Overhead Door Trim	10.875	1.5	0	10	CR	$5.44	$5.98	1	0
Trim	DT10{LF}{CC}	DT1010RR	DT1010RR	KEY 10 7/8" Overhead Door Trim - Really Red	KEY 10 7/8" Overhead Door Trim	10.875	1.5	0	10	RR	$5.44	$5.98	1	0
Trim	DT10{LF}{CC}	DT1010BG	DT1010BG	KEY 10 7/8" Overhead Door Trim - Beige	KEY 10 7/8" Overhead Door Trim	10.875	1.5	0	10	BG	$5.44	$5.98	1	0
Trim	FA12{LF}{CC}	FA1210CR	FA1210CR	KEY 12" Fascia - Cranberry Red	KEY 12" Fascia	12	0	0	10	CR	$6.00	$6.60	1	0
Trim	SF12{LF}{CC}	SF1210CR	SF1210CR	KEY 12" Soffit - Cranberry Red	KEY 12" Soffit	12	1	0	10	CR	$6.00	$6.60	1	0
Trim	SF12{LF}{CC}	SF1210RR	SF1210RR	KEY 12" Soffit - Really Red	KEY 12" Soffit	12	1	0	10	RR	$6.00	$6.60	1	0
Trim	SF12{LF}{CC}	SF1210BG	SF1210BG	KEY 12" Soffit - Beige	KEY 12" Soffit	12	1	0	10	BG	$6.00	$6.60	1	0
Trim	FA3{LF}{CC}			KEY 3" Fascia - Cranberry Red	KEY 3" Fascia	3	0	0	10	CR	$1.50	$1.65	1	0
Trim	FA3{LF}{CC}	FA310CR	FA310CR	KEY 3" Fascia - Cranberry Red	KEY 3" Fascia	3	0	0	10	*	$1.50	$1.65	1	0
Trim	FA3{LF}{CC}	FA310RR	FA310RR	KEY 3" Fascia - Really Red	KEY 3" Fascia	3	0	0	10	RR	$1.50	$1.65	1	0
Trim	FA3{LF}{CC}	FA310BG	FA310BG	KEY 3" Fascia - Beige	KEY 3" Fascia	3	0	0	10	BG	$1.50	$1.65	1	0
Trim	BF{LF}{CC}	BF10CR	BF10CR	KEY Flat Base - Cranberry Red	KEY Flat Base	1.5	0	0	10	CR	$0.75	$0.83	1	0

* 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

For trim material that comes in a variety of colors, SmartBuild requires that each piece be defined with every available color. One way to accomplish this is to manually enter duplicate entries with the different color codes of each available color into the upload file (e.g. 1 piece that comes in 10 colors will result in 10 different pieces entered into the upload file. Another way is to use the **wildcard (*)** in the color code. This feature makes it possible for you to manually enter only one item in your upload file (with the wildcard in the color column), and SmartBuild will do the work of expanding the item for every color.

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

Build the SmartBuild 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	Price	Taxable	Weight
Trim	BF{CC}			KEY Flat Base BY THE FOOT - Cranberry Red	KEY Flat Base BY THE FOOT	1.5	0	0		*	$0.75	$0.75	1	0
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	0		BG	$0.75	$0.75	1	0
Trim	BF{CC}	BFCR	BFCR	KEY Flat Base BY THE FOOT - Cranberry Red	KEY Flat Base BY THE FOOT	1.5	0	0		CR	$0.75	$0.75	1	0

* 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

Additional Data as defined for the Trim Category:

Dim 1 – Reveal width in decimal inches

Dim 2 – Thickness in decimal inches (if Z trim, use middle bend)

Dim 3 – (leave blank)

Part Length – length of part in decimal feet, rounded down to nearest foot
(leave blank if material is sold by the foot)

Color Code – ColorCode from the Color List, when applicable (or * for all)

Cost – Current Cost (with/without dollar sign), 0 or Blank

Markup – cost to price markup percentage

Price – Current Price (with/without dollar sign), 0 or Blank

Taxable – Indicator of taxable status (0-nontaxable, 1-taxable)

Weight – weight of item, used to calculate the weight of the order so shipping can be estimated

When the trim list is complete, upload the file to SmartBuild. Follow the directions in the *Adding/Uploading Material (except Trusses)* paragraph.

ADDING FASTENERS TO THE MATERIAL UPLOAD FILE

Fasteners may or may not have color association with them. If they do, then you should create the items with this information. If they don't have color associated with them, then there is very little additional information needed in the upload for these items.

SKU for Fasteners:

> If there isn't a color associated with the Fastener,
>> then the Vendor SKU can simply be copied to the SmartBuild SKU.
>
> If there is a color associated with the 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.
>>
>> 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.
>>
>> 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.

For fasteners that come in a variety of colors, SmartBuild requires that each piece be defined with every available color. One way to accomplish this is to manually enter duplicate entries with the different color codes of each available color into the upload file (e.g. 1 piece that comes in 10 colors will result in 10 different pieces entered into the upload file. Another way is to use the **wildcard (*)** in the color code. This feature makes it possible for you to manually enter only one item in your upload file (with the wildcard in the color column), and SmartBuild will do the work of expanding the item for every color.

Category	SKU	Full SKU	Vendor SKU	Original Description*	Material	Dim 1	Dim 2	Dim 3	Part Length	Color Code	Cost	Price	Taxable	Weight
Fastener	1.510Hex	1.510Hex	1.510Hex	1 1/2" #10 Hex	1 1/2" #10 Hex						$12.00	$12.00	1	0
Fastener	Fastener #2	Fastener #2	Fastener #2	Screws	Screws #2						$12.00	$12.00	1	0
Fastener	FAST{CC}	FASTCR	FASTCR	Screws - Cranberry Red	Screws					CR	$12.00	$12.00	1	0
Fastener	FAST{CC}	FASTRR	FASTRR	Screws - Really Red	Screws					RR	$12.00	$12.00	1	0
Fastener	FAST{CC}	FASTBG	FASTBG	Screws - Beige	Screws					BG	$12.00	$12.00	1	0
Fastener	FAST{CC}			Screws - Cranberry Red	Screws					*	$12.00	$12.00	1	0
	* 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													

Additional Data as defined for the Fastener Category:

> Dim 1 – (leave blank)
> Dim 2 – (leave blank)
> Dim 3 – (leave blank)
> Part Length – (leave blank)
> Color Code – ColorCode from the Color List, when applicable (or *)
> Cost – Current Cost (with/without dollar sign), 0 or Blank
> Markup – cost to price markup percentage
> Price – Current Price (with/without dollar sign), 0 or Blank
> Taxable – Indicator of taxable status (0-nontaxable, 1-taxable)
> Weight – weight of item, used to calculate the weight of the order so shipping can be estimated

When the Fastener list is complete, upload the file to SmartBuild. Follow the directions in the ***Adding/Uploading Material (except Trusses)*** paragraph.

ADDING DOORS AND WINDOWS TO THE MATERIAL UPLOAD FILE

There are 4 different opening types in SmartBuild: Walk Doors, Overhead Doors, Sliding Doors, and Windows. SmartBuild requires the definition of opening width and height (in decimal feet). To improve the display of the model, you can define an OBJ file that will be used to display the window/door in the model. The Support Department can help with the creation of this OBJ file.

SKU for Doors and Windows

The SKU can be the Vendor SKU or one created from scratch (see previous requirements/suggestions about SKUs).

Category	SKU	Full SKU	Vendor SKU	Material	Dim 1	Dim 2	Dim 3	Part Length	Color Code	Cost	Price	Taxable	Weight
WalkDoor	3068	3068	3068	3'w x 6' 8"h KEY Walk Door	3	6.6667				$100.00	$100.00	1	0
Overhead	100100	100100	100100	10'w x 10'h KEY Overhead	10	10				$500.00	$550.00	1	0
Overhead	160100	160100	160100	16'w x 10'h KEY Overhead	16	10				$800.00	$880.00	1	0
Overhead	KEY OHD-0	KEY OHD-0	KEY OHD-0	8'w x 8'h KEY Overhead	8	8				$900.00	$990.00	1	0
Slider	SLIDER -10x10	SLIDER -10x10	SLIDER -10x10	10x10 KEY Slider	10	10				$1,000.00	$1,100.00	1	0
Slider	SLIDER-12x12	SLIDER-12x12	SLIDER-12x12	12x12 KEY Slider	12	12				$1,200.00	$1,320.00	1	0
Slider	SLIDER-16X12	SLIDER-16X12	SLIDER-16X12	16x12 KEY Slider	16	12				$1,600.00	$1,760.00	1	0
Window	2040	2040	2040	2'w x 4'h KEY Window	2	4				$40.00	$40.00	1	0
Window	3040	3040	3040	3'w x 4'h KEY Window	3	4				$60.00	$60.00	1	0

Additional Data as defined for Doors and Windows Categories:

Dim 1 – Opening width in decimal feet

Dim 2 – Opening height in decimal feet

Dim 3 – object file to display on model. You can initially leave this field blank

Part Length – (leave blank)

Color Code – (leave blank)

Cost – Current Cost (with/without dollar sign), 0 or Blank

Markup – cost to price markup percentage

Price – Current Price (with/without dollar sign), 0 or Blank

Taxable – Indicator of taxable status (0-nontaxable, 1-taxable)

Weight – weight of item, used to calculate the weight of the order so shipping can be estimated

When the door and window list is complete, upload the file to SmartBuild. Follow the directions in the ***Adding/Uploading Material (except Trusses)*** paragraph.

ADDING CUPOLAS TO THE MATERIAL UPLOAD FILE

Cupolas have a special set of defining parameters (see below for that definition). Cupola isn't a named category. When uploading Cupolas, you'll need to use the ACCESSORIES category.

SKU for Cupolas

The SKU can be the Vendor SKU or a newly created one (see previous requirements/suggestions about SKUs).

Category	SKU	Full SKU	Vendor SKU	Material	Dim 1	Dim 2	Dim 3	Part Length	Color Code	Cost	Price	Taxable	Weight
Cupola	C24	C24	C24	KEY 2' x 2' Square Cupola	24	18	4			$144.00	$144.00	1	0
Cupola	C36	C36	C36	KEY 3' x 3' Square Cupola	36	27	4			$324.00	$324.00	1	0

Additional Data as defined for the Cupola Category (using the Accessories category):

Dim 1 – Length / Width in decimal inches

Dim 2 – Height in decimal inches

Dim 3 – Roof Pitch

Part Length – (leave blank)

Color Code – (leave blank)

Cost – Current Cost (with/without dollar sign), 0 or Blank

Markup – cost to price markup percentage

Price – Current Price (with/without dollar sign), 0 or Blank

Taxable – Indicator of taxable status (0-nontaxable, 1-taxable)

Weight – weight of item, used to calculate the weight of the order so shipping can be estimated

When the Cupola list is complete, upload the file to SmartBuild. Follow the directions in the ***Adding/Uploading Material (except Trusses)*** paragraph.

ADDING ITEMS FROM THE REMAINING CATEGORIES TO THE MATERIAL UPLOAD FILE

(Foundation, Hardware, Walk Door Hardware, Overhead Door Hardware, Slider Hardware, Window Hardware, Cupola Hardware, Connector, Labor)

These remaining categories don't have any special defining parameters. The main data needed for these are the SKU and Material/Description. It is possible for some of these items to have color associated with them. If they do, you can use the {CC} token to create items with the color code (as previously described.

SKU - The SKU can be the Vendor SKU or a newly created one.

Category	SKU	Full SKU	Vendor SKU	Material	Dim 1	Dim 2	Dim 3	Part Length	Color Code	Cost	Price	Taxable	Weight
Connector	HANGER01	HANGER01	HANGER01	NAILS PURLIN HANGER						$10.00	$20.00	1	0
CupolaHardware	WV-BEAR-30	WV-BEAR-30	WV-BEAR-30	Weathervane BLACK BEAR 30						$10.00	$20.00	1	0
Foundation	PCL5	PCL5	PCL5	KEY 5' PermaColumn						$12.00	$12.00	1	0
Hardware	OSB5848	OSB5848	OSB5848	OSB						$10.00	$11.00	1	0
OverheadHardware	1165	1165	1165	LiftMaster Model DT-75-11						$875.00	$962.50	1	0
SliderHardware	BACCENGUIST	BACCENGUIST	BACCENGUIST	CENTER GUIDE & STOP						$10.00	$11.00	1	0
WalkDoorHardware	LOCK-EZ-2K/K	LOCK-EZ-2K/K	LOCK-EZ-2K/K	ADVANTAGE-KNOB/KNOB ENTRY						$10.00	$20.00	1	0
WindowHardware	SHUT-15X63-BLK	SHUT-15X63-BLK	SHUT-15X63-BLK	SHUTTERS 15X63 VINYL - BLACK						$10.00	$20.00	1	0

Additional Data as defined for the remaining categories:
   Dim 1 – (leave blank)
   Dim 2 – (leave blank)
   Dim 3 – (leave blank)
   Part Length – (leave blank)
   Color Code – (leave blank)
   Cost – Current Cost (with/without dollar sign), 0 or Blank
   Markup – cost to price markup percentage
   Price – Current Price (with/without dollar sign), 0 or Blank
   Taxable – Indicator of taxable status (0-nontaxable, 1-taxable)
   Weight – weight of item, used to calculate the weight of the order so shipping can be estimated

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 or XLSX 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.
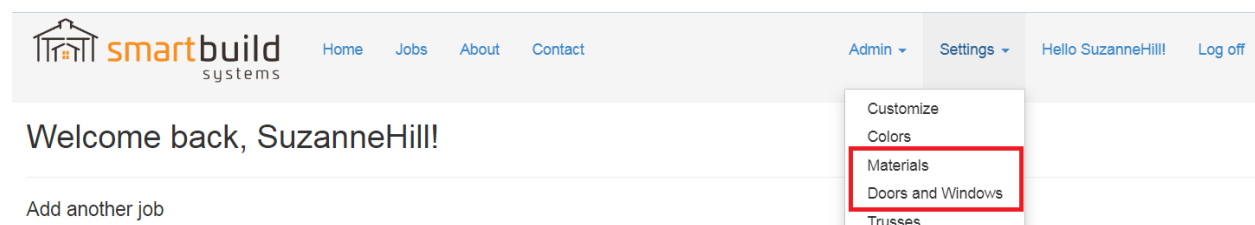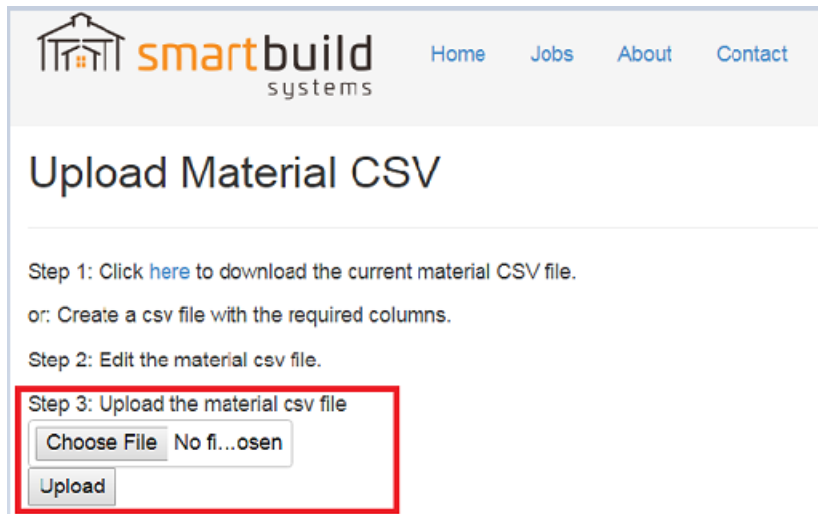
On either the Materials page (see below) or the Doors/Windows page, select the UPLOAD button
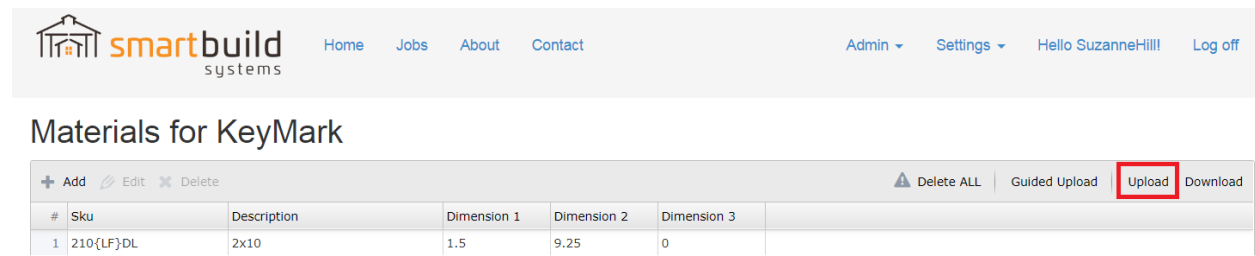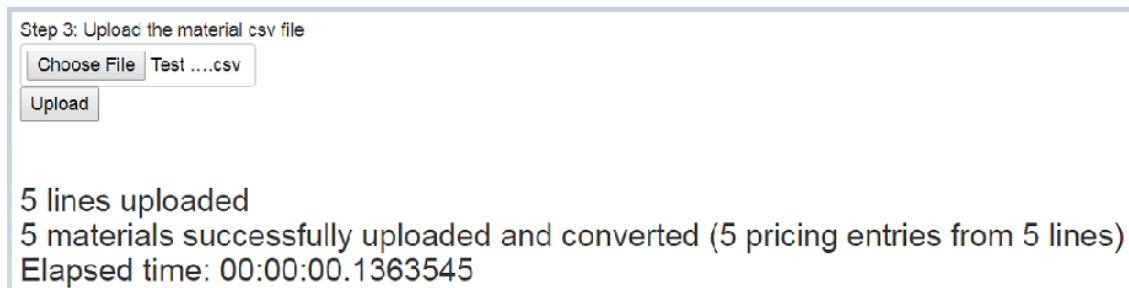
The UPLOAD MATERIAL page will be displayed.
Click on the CHOOSE FILE button, and choose the appropriate CSV or XLSX file via Windows Explorer.
Select UPLOAD.
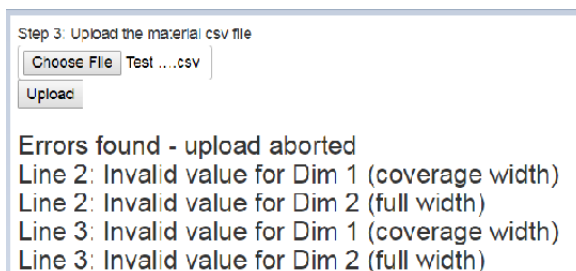
If the upload is successful, a message will be displayed indicating the number of entries uploaded, along with the number of pricing entries created.

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)
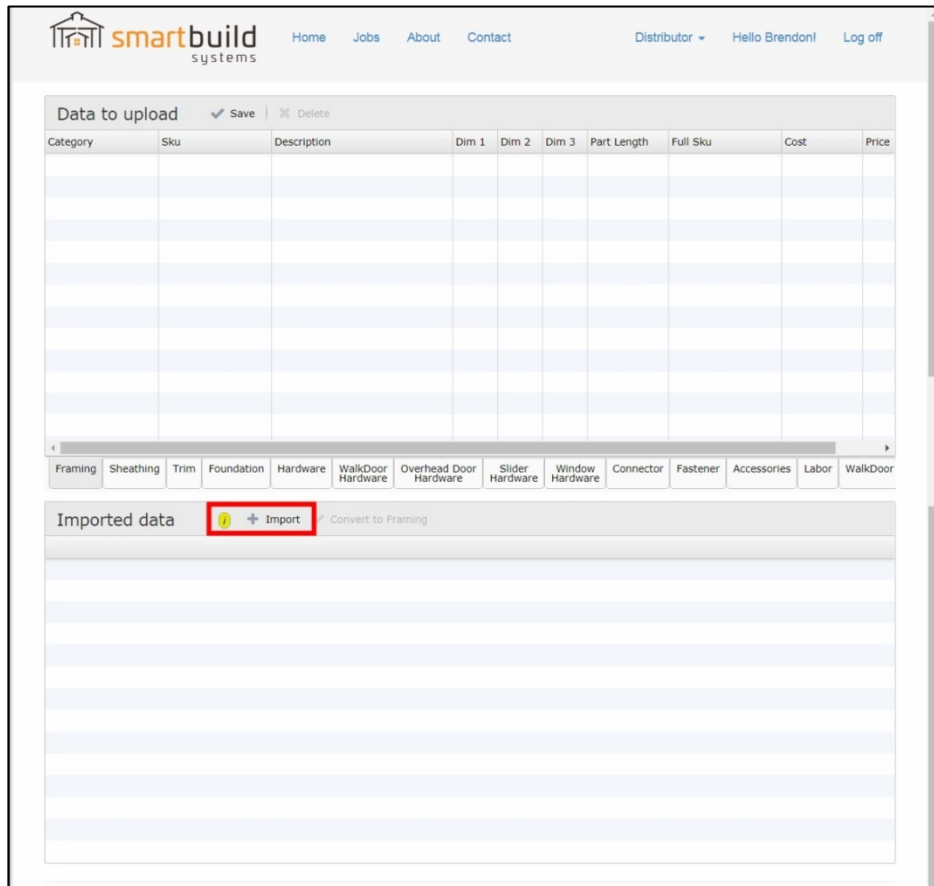
To import your material using the Guided Upload option data from a CSV or XLSX file, go to the Materials, or Doors/Windows page.
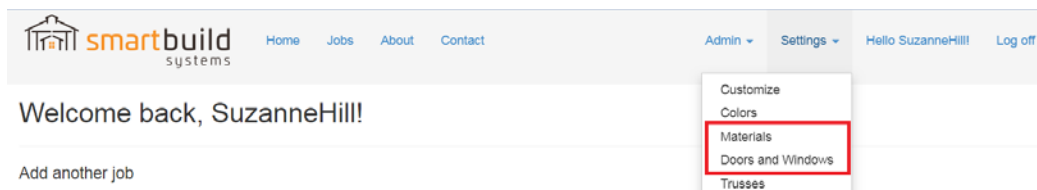
On either the Materials page (see below) or the Doors/Windows page, select the GUIDED UPLOAD button.

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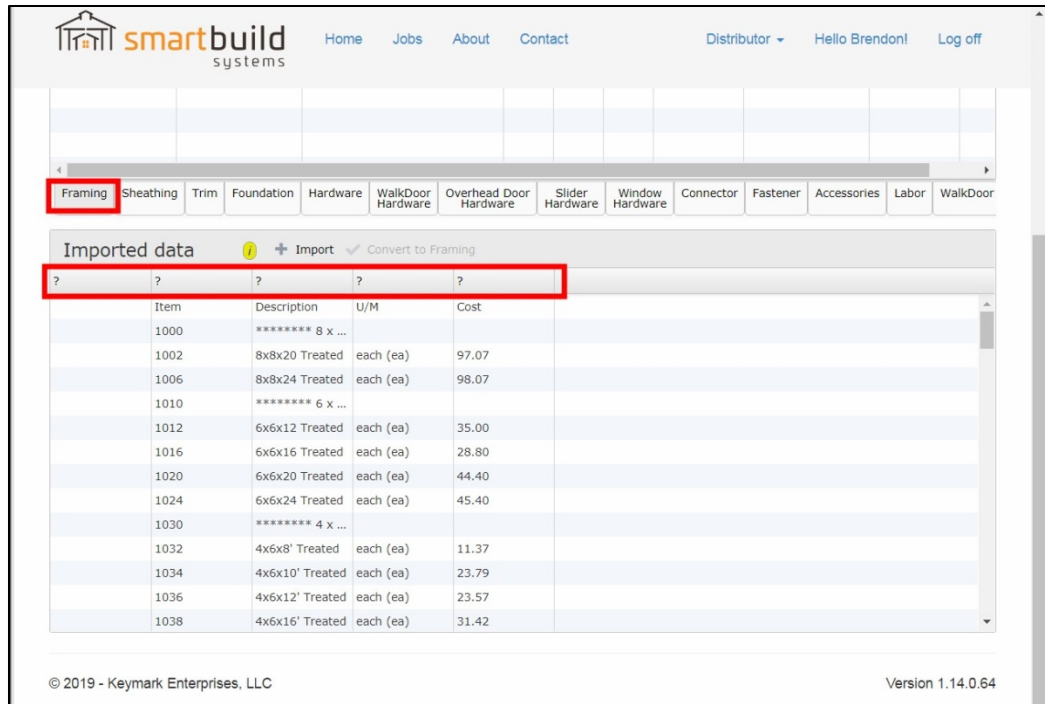
In the top half of the window, select that tab to which the data is to be added. (In the screen shot above, the FRAMING tab has been selected.) Notice that there are question marks where your column headers should be.

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!
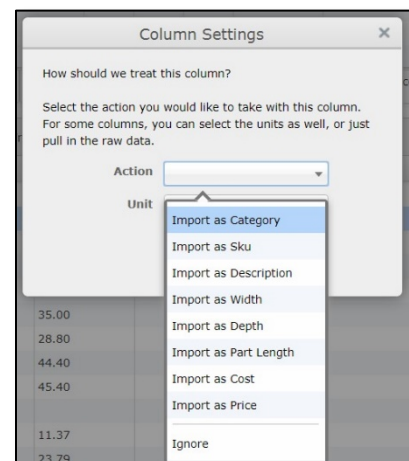
ADDING MATERIAL ONE ITEM AT A TIME

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 or XLSX file to upload, or you can use the ADD function to add individual items.
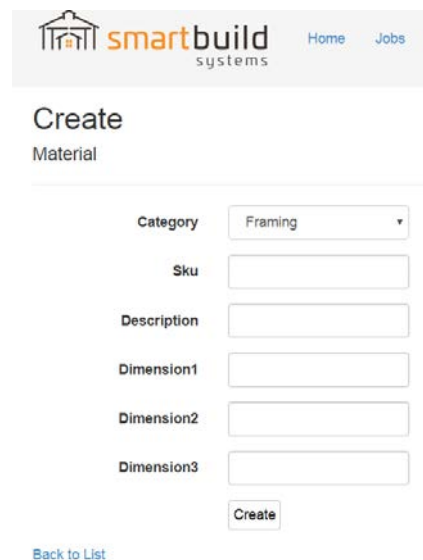
Navigate to the Materials, or Doors/Windows page (using the SETTINGS drop down menu). On either the Materials page (see below) or the Doors/Windows page, select the ADD button.

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.
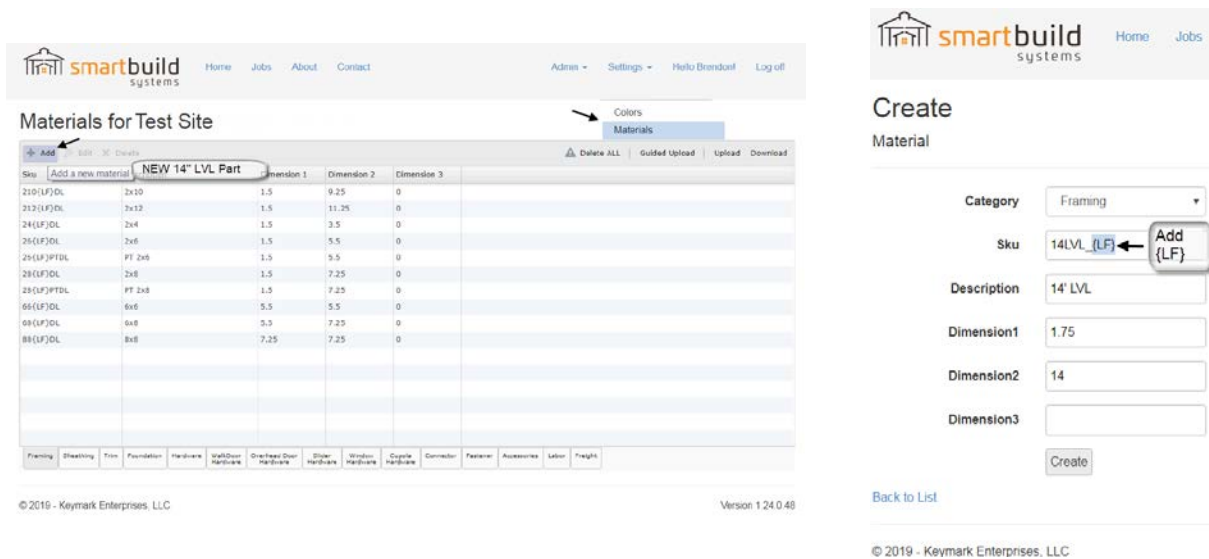
Adding Framing Parts (individual)

When adding or editing any material in SmartBuild, there are two different pages that control the material properties. First the material must be added on the Settings/Materials page, then after a material is added, use the Settings/Pricing page to add or delete part lengths, colors and update pricing.
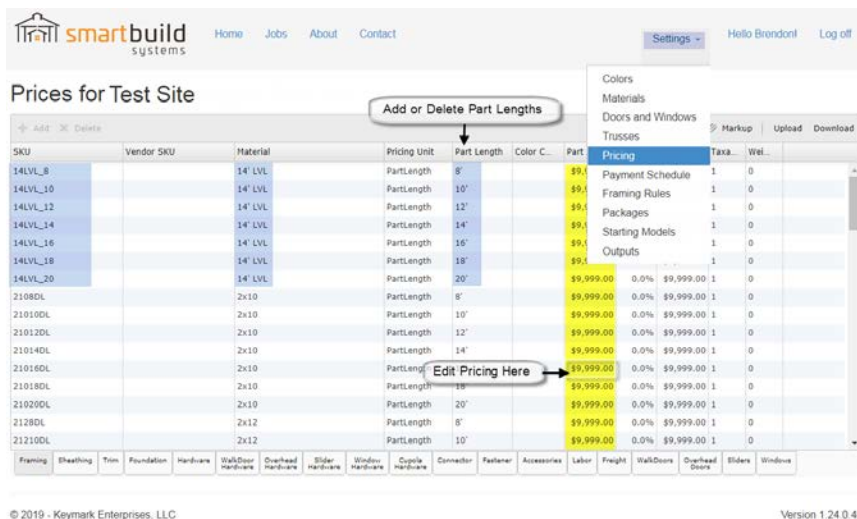
To change a part length of an existing trim or lumber material, on the Pricing page, double-click on the part length and type in a length. (Note: the part lengths for Framing parts can only be rounded to the nearest foot). To delete a part length, select just a single line item, or multiple line items by holding down the Shift or Ctrl buttons, and use the Delete (trashcan) button to remove them from the Pricing list. To add a part length, just select a part that's already on the Pricing page list and click the Add button. A new line item with a 1' foot length will be added to the list, then double click the new 1' foot length and edit to the desired length.

Here are some examples for adding a basic Framing part like LVL on to the Materials and Pricing pages:

The new part must be first added on the Materials page, with a {LF} included in the SKU. The {LF} is required by the program to allow for multiple part lengths for the LVL. Add a Description and fill out the relevant dimensions in decimal inches (see example above). Once added on the Materials page, you can then edit the part lengths and prices together on the Pricing page.

Adding Doors and Windows (individual)

To add a new Door or Window part to the database use the Door and Windows page under Settings. There are 4 different opening types in SmartBuild: Walk Doors, Overhead, Sliders and Windows. After clicking on the Add button, pick the opening type you want to add from the category pull down. Only fill out the SKU, Description, Width and Height. The width and height are in decimal feet (not feet and inches). There are no special requirements in SmartBuild for the SKU and Description for doors and windows, they can be anything that makes sense for your business. The rest of the settings on this page can be left blank for doors and windows. Once doors and windows have been created in Materials, then you can go to the Pricing page to update the pricing for all the doors and windows that have been added.

Adding Hardware Parts ('Each' items) - individual

To add a new Hardware part, use the Add button on the Materials page. When adding a new Hardware part, first make sure to select the correct hardware category for the specific type of hardware you are adding. If there is a question about what category material belongs to, use the 'Hardware' category as a general catch-all category. Because most Hardware items do not have part lengths or colors they can be listed as "each" items with no {LF} {CC} codes necessary in the SKU field. Hardware SKUs and Descriptions can be whatever makes sense for your business. Note: Some Hardware items like Gutters and Vinyl Siding can also use a color code {CC} but it's not required for most Hardware items.

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 or uploaded from a different window. The Trusses database is separate from the main Materials database (notice that there are no Truss parts listed when downloading the Material or Material Pricing CSV or XLSX file).

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

Below are the truss fields that can be included in SmartBuild.
> TRUSS (* items are required):
>> *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)

For a better understanding of the Truss Table, watch this training video.

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:
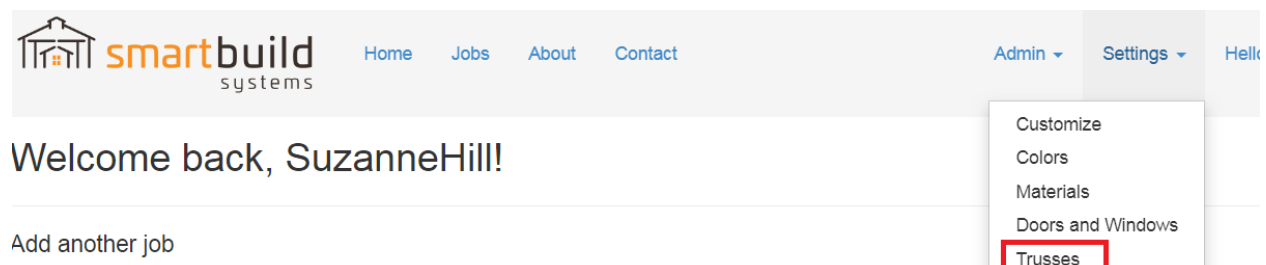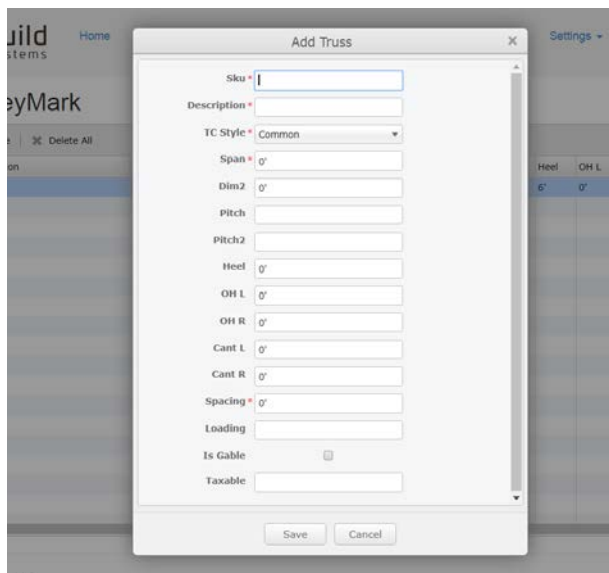
The TRUSSES page will then be displayed. From this page, select the ADD option.
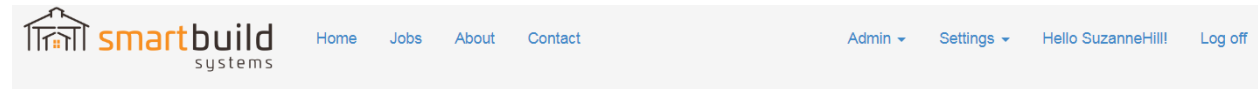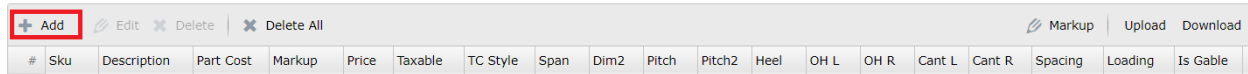
The ADD TRUSS dialog box will be displayed, allowing you to enter the truss definition data you want to add. Please note the required fields have an asterisk by the field name.

The truss menu that pops up has specific truss attributes (like span, heel height, spacing etc.) to define the truss that gets added. These truss attributes are used so SmartBuild can find the exact or closest matching truss based on the specifics of each job. When adding trusses to the Truss page first add a few basic trusses by using the Add button, then you can use the Download button to download the full Truss table in a CSV or XLSX format, and then use the downloaded file as a template to add and fill out the rest of the Trusses.

For each truss that gets added make sure there is also a corresponding Gable-End Truss. These truss pairs will have all the properties except the "Is Gable" will be 'Yes' for the gable truss, and the price will be different. The Truss pricing is also controlled on this same Truss table (no need to go to the Pricing page for trusses).   Note that a few of the settings on the Truss table like Loading are not required and can be left blank unless otherwise noted.

Once all the data has been entered, select the SAVE button.

UPLOADING TRUSS DATA

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

Creating TRUSSES File Template:
From the SmartBuild Home Page select TRUSSES from the SETTINGS dropdown menu.
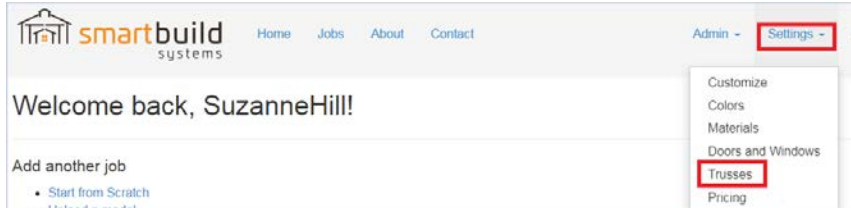
A file named "TrussList-CompanyName" will be saved in your DOWNLOADS folder. Use this as the template for your upload CSV or XLSX file. If the database had any default data in it, you should delete this data from the file template, AND delete the entries individually in SmartBuild. The upload process will NOT delete an entry in the SmartBuild database.

Below is the format of the **Truss** upload CSV file. A few examples 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	4	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	
*	*	*	*									*					*	*Required	

Once the file is completed, the next step is to upload it. From the TRUSSES page, select the UPLOAD button.
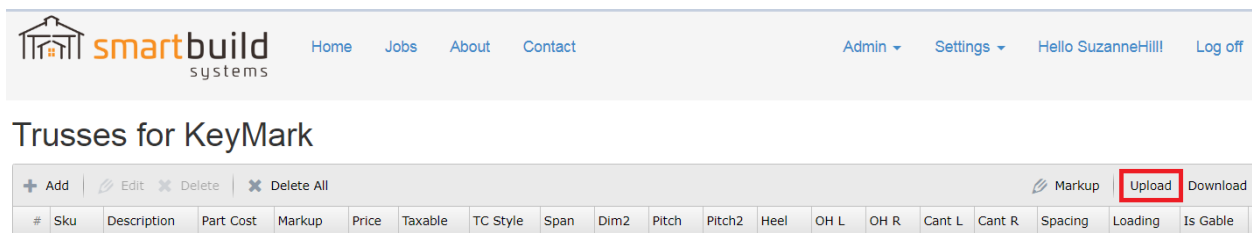
The UPLOAD TRUSS LIST page will be displayed. Click on the CHOOSE FILE button, and choose the appropriate CSV or XLSX file via Windows Explorer. Select UPLOAD.

Upload Truss List CSV for KeyMark

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

Choose File | No fi...osen

Upload

Back to List

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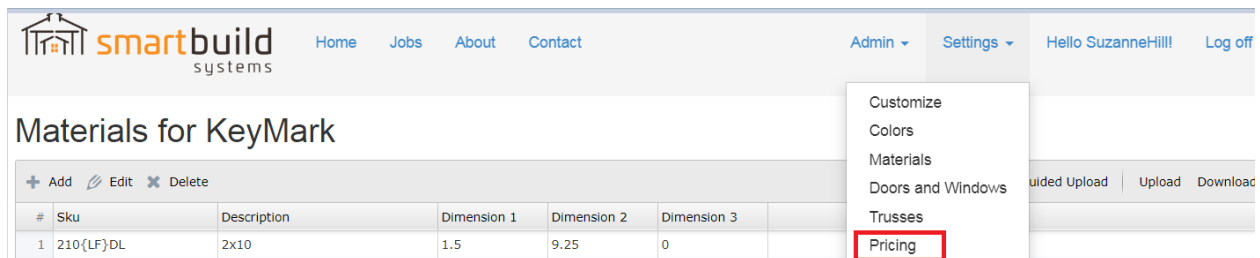
The pricing data includes the cost, markup, price and taxable status of each item in the database.

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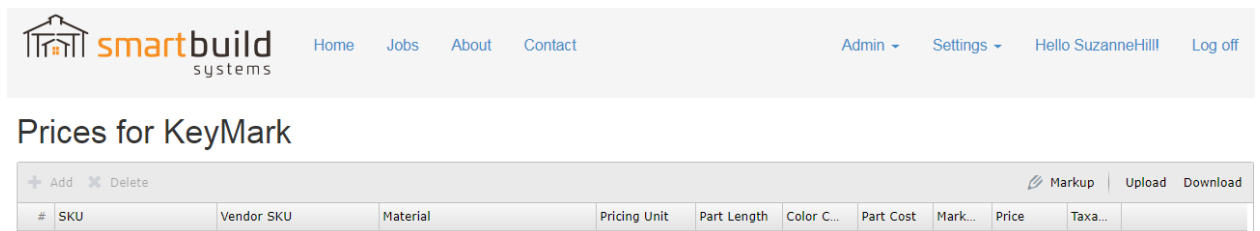
- Change pricing data directly in the PRICES page
- Using the EDIT MARKUP option on the PRICES page
- Upload new prices on the PRICES page

Navigate to the PRICES Page by selecting PRICING in the SETTINGS drop down menu.
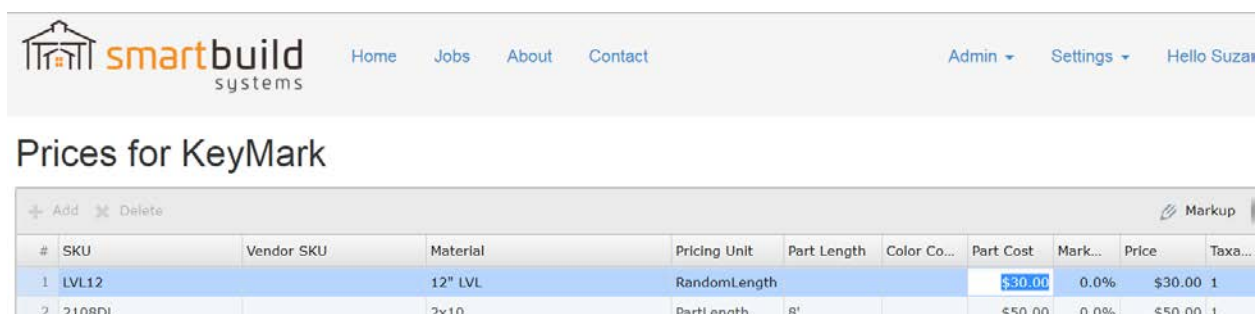
Once on the PRICES page you can choose any of the options listed above.

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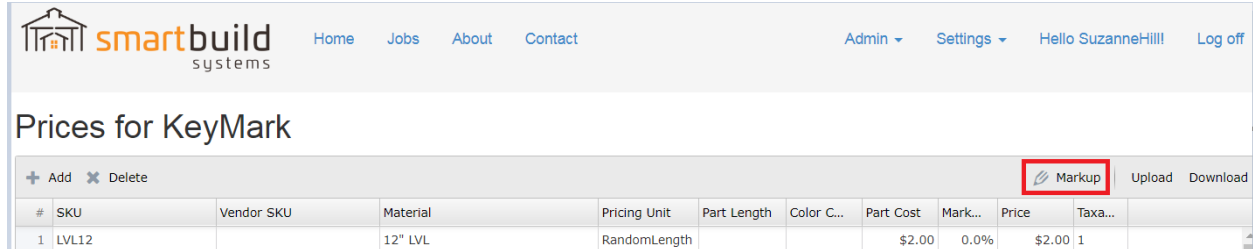
After the PRICES page is displayed, double click the field (cost, price, markup or taxable status) you want changed. Once the existing data is highlighted, enter the new data.

CHANGE PRICING DATA BY USING THE EDIT MARKUP OPTION

From the PRICES page, select the EDIT MARKUP button.

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.
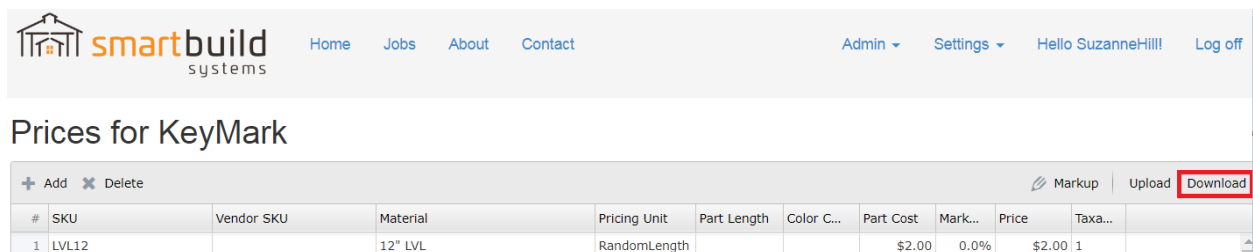

CHANGE PRICING DATA BY UPLOADING A FILE

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.

The CSV or XLSX 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.

Category	SKU	Vendor SKU	Material	Pricing Unit	Part Length	Color Code	Cost	Markup	Price	Taxable	Weight
Framing	LVL12	LVL12	KEY 12" LVL (BY THE FOOT)	RandomLength			$4.00	10.00%	$4.40	1	2
Framing	LVL12{LF}	LVL1216	KEY 12" LVL	PartLength	16		$30.00	10.00%	$33.00	1	32
Framing	210{LF}DL	2108DL	KEY 2x10	PartLength	8		$50.00	0.00%	$50.00	1	16
Framing	210{LF}DL	21010DL	KEY 2x10	PartLength	10		$6.00	0.00%	$6.00	1	20
Framing	212{LF}DL	21214DL	KEY 2x12	PartLength	14		$7.00	0.00%	$7.00	1	28
Framing	212{LF}DL	21216DL	KEY 2x12	PartLength	16		$8.00	0.00%	$8.00	1	32

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 markup, 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 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.

The WEIGHT column is required when uploading the PRICING data. However you can set the value to zero, if you want.

Save the file, then re-upload the file to SmartBuild.

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

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.

MATERIAL SETUP COMPLETION:

Getting all your materials into SmartBuild takes some upfront work. By identifying the type of material you are uploading, and following the guidelines above, you should be able to load all your materials into SmartBuild in a relatively short period of time.

After you've uploaded your materials into SmartBuild, there's one last step you can do to flag any possible SKU duplicates. Download the material then re-upload that same file. If error messages are displayed, then there are duplicate SKUs in the database. You error messages should give you enough information to find those duplicates so you can correct them. If the re-upload was a success, then you're ready to move onto the next step in the SmartBuild setup process … ***Step 3: Define Framing Rules***