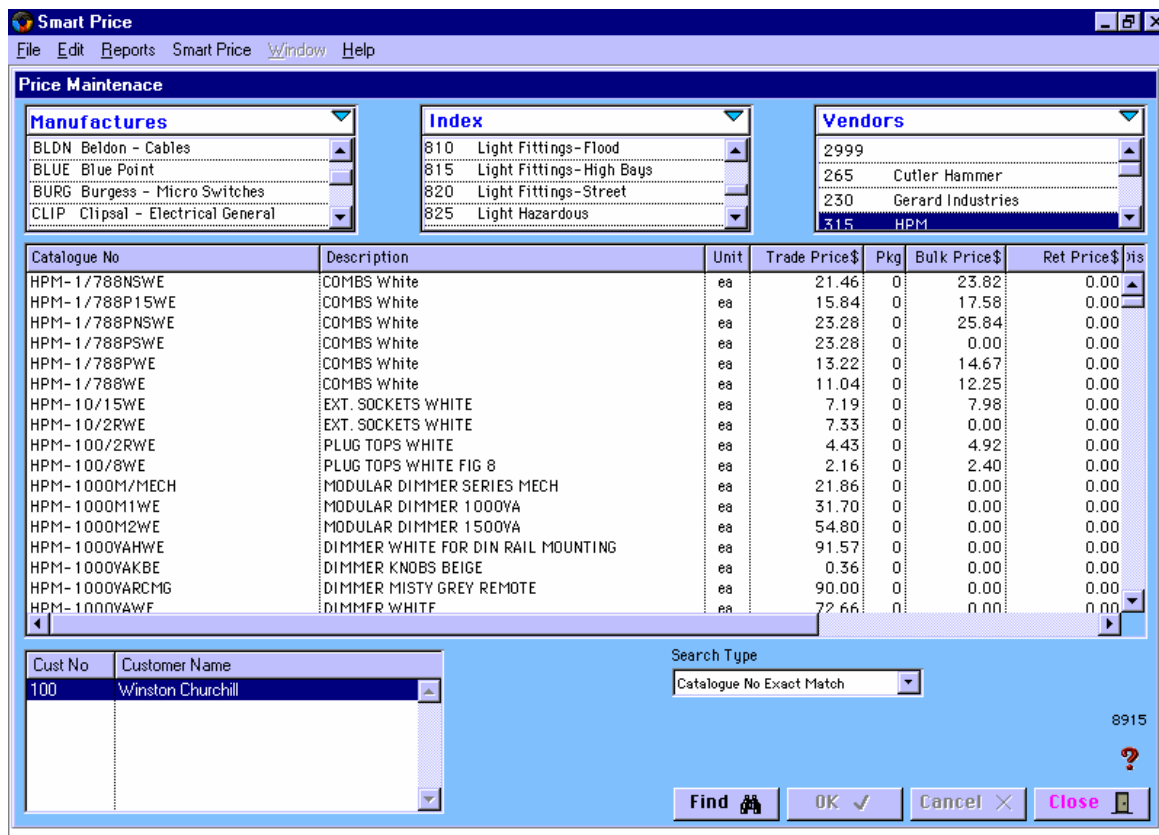


Section 7

Smart Price Menu:



7.1 Price Book



How it Works

The purpose of the screen is to be able to look up and find prices quickly and efficiently. Prices can be found by various methods and can be used in the basic estimating system that is built into this system.

The screen is broken up into table fields which look up results and are displayed in the main screen in the centre. Some of these fields are Manufacturers, Index, Vendors, Customers and Search Type.

It is important to remember the structure of the data and the difference between a “**Vendor**” and a “**Manufacturer**”.

The Vendor is usually a company who supplies data to Atad Data for the inclusion in the Price Book, they can have various Manufacturers that they act as a Representative or an Agent. There exist the possibilities that there may be the same product contained within the database, being marketed by two different Vendors that have the same Manufacturer’s code. To view the complete table field click on the triangle facing down, the table field will be expanded.

To display a “**Vendor**”, double click on the one required and the search results will be displayed. Some Vendors records can be very large so the program limits the viewing to a maximum of 5,000 records at a time. To view the next 5,000 records click on the line description “View next 5,000 Records” found most times at the bottom and top of the list.

Vendors	
820	Lou J Murray (PDL)
365	Moeller Electric Pty Ltd
365	Moeller Electric Pty Ltd
820	PDI Industries Aust P/L

To display a “**Manufacturer**” click on the one required and the search results will be displayed.

Manufactures	
CLIP	Clipsal - Electrical General
CUTL	Cutler Hammer - Control Equip
GECA	GEC Alsthom
RITT	Rittal - Enclosures

To find an item via the “**Index**” click on the one required and the search results will be displayed. The Index is developed by Atad Data and is under constant review and subject to change without notification.

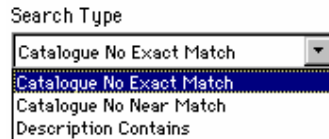
Index	
4	Adaptable Box Poly
7	Aerial Line Hardware
10	Alarms - Security & Access Control
0	B

The customer table displays the active (Current) customers in this table, see section 7.3 for a more detailed explanation.

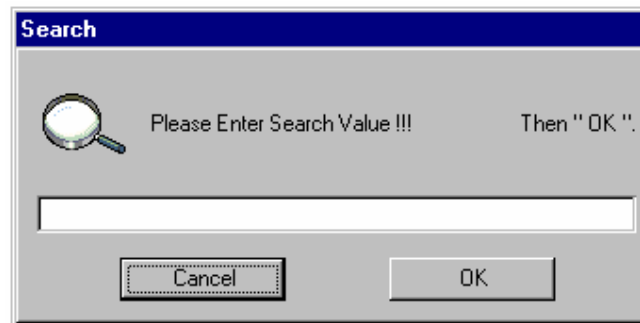
Cust No	Customer Name
101	Mr John Smith
102	George Bush
105	Winston Churchill

The Customer Table is utilised in this screen so the user can obtain information into a basic estimate table. Using the mouse, select a customer by clicking on the one required, find the record that you want in your estimate by clicking on the record, then by holding the mouse button down drag the pricing record over the top of Customer Name and release the mouse button. The pricing record will appear in the customer table ready for applying quantities, discounts and labour rates.

Search Types



To find by Catalogue Number, click **“Search Type”**, then click on the **“FIND”** button, the following dialog box will appear:



Enter the Catalogue Number into the field and click **“OK”**.

Depending what search procedure was used the results are displayed in the main table. Further clarification on searches follows:-

“Catalogue No. Exact Match”

Pre-select a Manufacturer, the prefix will be automatically inserted otherwise you will have to enter the entire prefix, you can use the table as guide to do this.

“Catalogue No. Near Match”

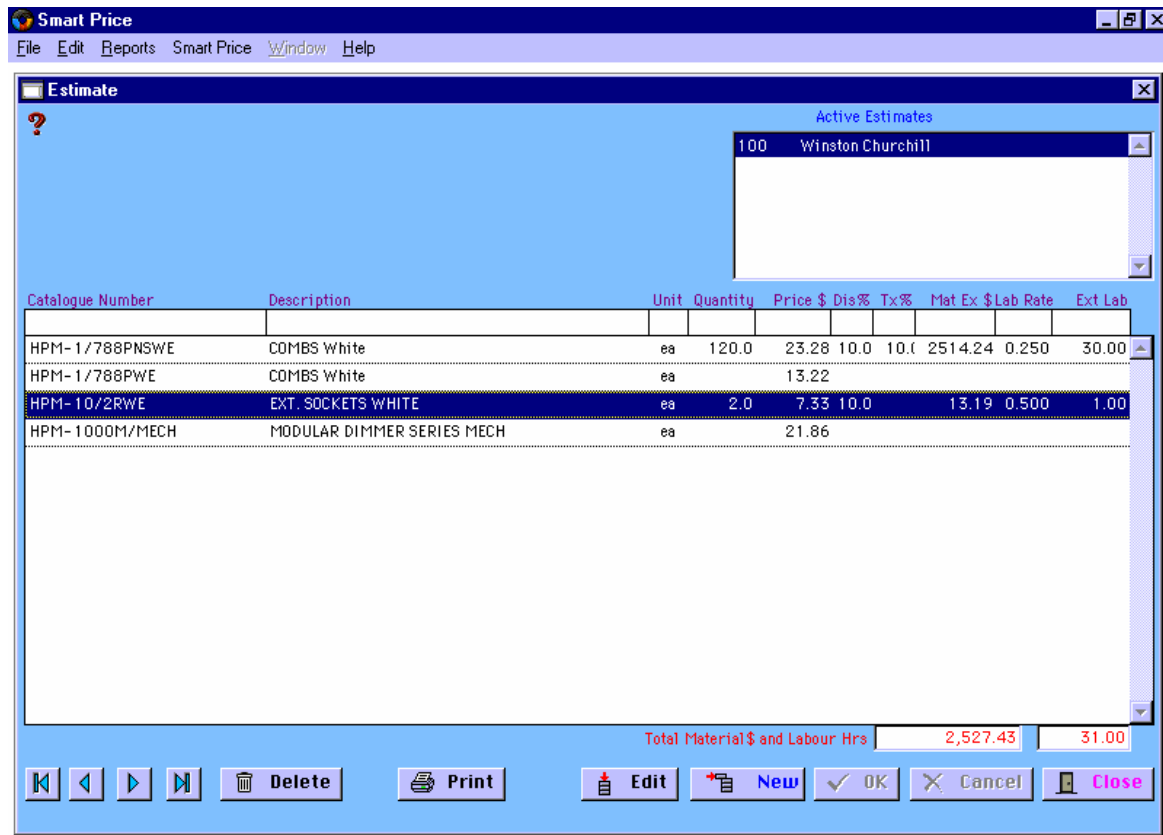
The search procedure finds the closest match acting on the available information, for example, if you entered the value “1” as a search value, this would initiate the search to look for all the catalogue numbers that contain 1. This would be an unsatisfactory search and would take some time to produce and would display a multitude of unwanted records. It is best to refine the search criteria by adding as much of the catalogue number as possible.

“Description Contains”

The search procedure is similar to the “Catalogue No Near Match”, with exception that it works in the “Description” field instead of the catalogue number. For example, if you entered the word “GLASS” as the search value, this would initiate the search to look for all the descriptions that contain the word “GLASS”. All of these records would then be displayed. Remember this is case sensitive.

The Main List field constructed using “Headed List Field”, enables sorts to be initiated when some of the headers defining the columns are clicked upon.

7.2 Estimate



How it Works

Smart Price contains a simple estimating package where an Estimate can be prepared using the pricing records contained in the main data file. The records can be dragged and dropped into the selected estimate as described in the previous section. The estimate lines can be entered manually as well.

Metric Hours	
Hour	Minutes
0.05	3
0.1	6
0.15	9
0.2	12
0.3	18
0.4	24
0.5	30
0.6	36
0.7	42
0.75	45
0.8	48
0.9	54
1	60
1.25	75

When the records come from the pricing list the only action needed is for Quantities, Discounts and Labour rates. Labour rates are entered as metric hours as displayed in the following graphic.

When all the required entries are made a report can be produced showing totals of Material and Hours. This report also produces the total cost of project using the Material Markup % and the Hourly Rate that is entered in the "Estimate Number" screen.

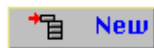
The extended Material column in the table is known as a derived field and is derived from the multiplication of the "Quantity x Price \$ - Discount" giving the result totalled at the bottom of the table.

The extended Labour column in the table is known as a derived field and is derived from the multiplication of the **Quantity x Labour Rate** giving the result totalled at the bottom of the table.

Active Estimates

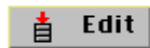
101	Mr John Smith
102	George Bush
105	Winston Churchill

To display the contents of any current estimate click the one required, this will highlight the estimate, do a search and display the contents.



For adding a new record to the Estimate, highlight the "Vendor" and then using the drag and drop method in the main "Price Book", drag the required item over the Customer Name. The record is added to the bottom of the table.

Note: You can not enter your own catalogue number as this maintains the integrity of the catalogue numbers provided.



Edit allows a selected record to be modified, such as adding the quantities and discounts etc. When the modifications are made click the "OK" button, this writes the modified record to the database or should you wish not to go through with the modifications, then click on the "Cancel" button this aborts the operation.



This allows for the deleting of a single selected record at a time and has no undo function.

7.3 Estimate Number

Estimate Number and details.

? Estimate Number Attention :-

Client Name Active Estimate

Street Address Hourly Rate \$ Material Mk Up % Date Due

Suburb State Post Code Phone Number Fax Number

Active Estimates

102	George Bush	20 Rae Street	BIRMINGHAM GARDENS	NSW	2300
101	Mr John Smith	16 Moore Street	COFFS HARBOUR	NSW	2450
105	Winston Churchill	10 Downing Street	LONDON	ENG	1000

Navigation: Find Delete Edit New OK Cancel Close

How it Works

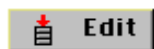
The main aim is to be able to enter the details of an Estimate so that it can be tracked and stored. The Estimate numbers are generated by finding the last Estimate number in the data base and adding 1 to it, this gives the user a unique estimate number. The numbering sequence starts of from 100.

Another important feature is the “Active Estimate”. If the box is checked then the Estimate will be displayed in the table, however, if the box is unchecked the “Estimate” will not be displayed. This does not mean the estimate is deleted. A search can be done and the Estimate made active.

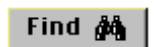
The Material Markup % and the Hourly Rate are important as they are used in the Estimate report generation.



A new record can be added to your data base, when you have made data entries in all the fields. Use the “Tab” key to jump from field to field and then click “OK”. This writes the record to the data file, otherwise press “Cancel” to abort the operation.



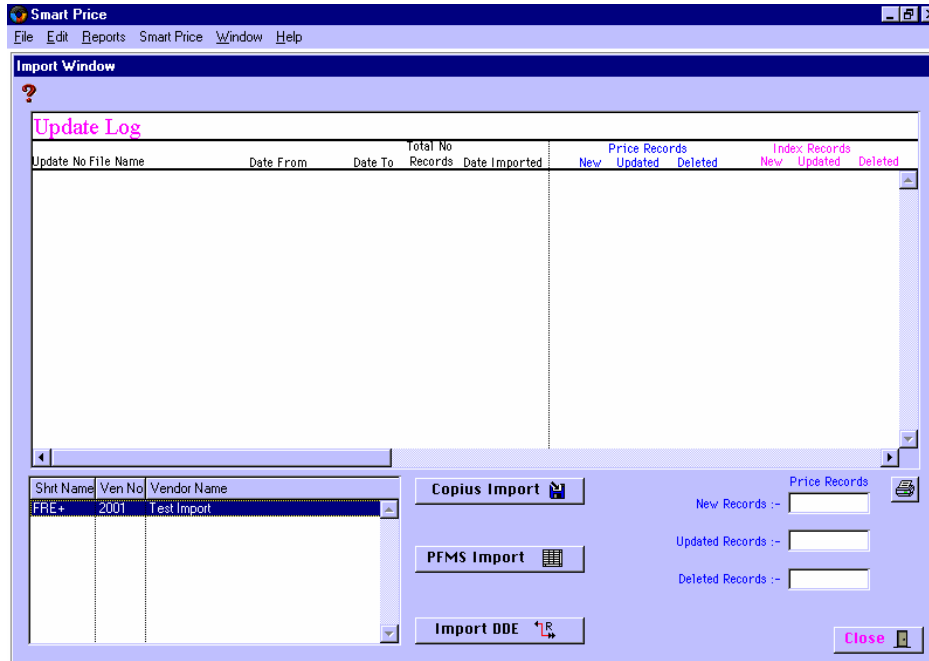
Edit allows you to modify an existing data record. Tab through the fields making the necessary modifications and then click “OK”. If you do not wish to proceed press “Cancel”.



The find button will initiate a find on the indexed fields. Indexed means the fields have been set up for quick searches on information, for example, if a customer phoned, you could do a find on the number bringing all the details up on their Estimate(s).

If you want to do a search on the person's name, click "Find", tab in the name field, then type a near description and then "OK", a near match should occur if there is a match. Or as mentioned before, the find will work on other indexed fields the cursor will jump to the indexed fields.

7.4 Importing – Logging



How it Works

The main aim of this window is to Import via three different methods and to provide a log showing wherever possible the movement of the pricing data file including Vendors, Manufacturers and Index information.

Copius Import

This import comes from Copious Data, (Atad Data) who look after the restructuring and redistributing of data as a service. The data arrives in the form of a data file via electronic media, and can have the suffix .odt, .df1 and .bin.

The user should check the log and make sure that the correct order is maintained for that particular type of import data. When you are happy with your selection click the "Copious Import" button, you will be prompted for a location of your data file, select the file and then click "OK".

The importing process will commence and the system will update itself including Vendors, Manufacturers and Index. All details will be published in the log.

PFMS Import

The user should check the log and make sure that the correct order is maintained for that particular type of import data. When you are happy with your selection click the "PFMS Import" button, you will be prompted for a location of your data file, select the correct data file and then click "OK", the import procedure will commence.

Import DDE

Smart price has the ability to communicate with Microsoft Excel via the DDE (Dynamic Data Exchange) channel. This form of communication allows the user to arrange a spreadsheet in the form shown below and to import their own price list as a “**Private Vendor**”. The “Private Vendors” available are displayed in the bottom left side of the screen.

When running this procedure you will be prompted for a location and a data file, select the Excel spreadsheet file and open. This starts the procedure and when finished will add another record to the import log table.

	A	B	C	D	E	F	G	H	I
1	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8	Column 9
2	Cat No	Description	Unit	Trade Price	Bulk Price	Index No	Wght Unit	Weight	Area
3	1517-0525/M	SWITCH-QL.ALARM RH.	ea	107.90					
4	1517-0737/M	SHUNT TRIP SOLENOID 240V	ea	76.50					
5	1517-1277/M	LOCK OFF DEVICE-QL	ea	134.00					
6	1517-1281/M	SINGLE LOCK OFF/ON DEV.	ea	28.40					
7	1517-1290/M	LOCK ON/OFF DEVICE QL	ea	40.90					
8	1517-1299/M	LOCK OFF BRACKET KIT	ea	72.90					
9	DQ10	DQ10-10 CIRCUIT BREAKER	ea	144.00					
10	DQ16	DQ16-16 CIRCUIT BREAKER	ea	144.00					
11	DQ20	DQ20-20 CIRCUIT BREAKER	ea	144.00					
12	DQ25	DQ25-25 CIRCUIT BREAKER	ea	144.00					
13	DQ32	DQ32-32 CIRCUIT BREAKER	ea	144.00					
14	ELDO1002	ELDO1002-250V 1A 40-60HZ	ea	794.20					

When this procedure runs, the programme will first look for the combined catalogue number (example PRI*- CATNUMBER) and update, or will add new records if not found.

You will be asked the question, “If the data has been imported before” and if you have records with dates that do not match today’s date or if you have some lesser dates you will be asked the following question: “Do you want to delete the older records?” Click either “YES” or “NO”.

The Rules:

- As stated above, the exact columns must be maintained and note that this only allows for the Trade Price to be imported.
- The price list must start on the third line. This allows you set templates for column headings etc.
- The Index must be pre-entered if you want to have it appear in the Index as per the other items.
- You must set up the “Private Vendor” first in the Vendor’s window.
- It stops reading data when the procedure experiences its first blank **Description**, other records are allowed to be blank.
- The Microsoft Excel Program and spreadsheet must be open and running.

Note : Save before doing import.



Prints the import record table displayed.

7.5 Vendors

Smart Price
File Edit Reports Smart Price Window Help

Vendors Names

Head Office Vendor

Ven Number Short Name
 Company Name
 Street Address
 Suburb State P Code
 Postal Address
 P.O. Box
 Suburb State P Code
 Contacts
 Phone No Fax No
 E-Mail Address

Sht Name	Vendor No	Company Name
TRA^	2999	
CUTH	265	Cutler Hammer
CLIP	230	Gerard Industries
HPM	315	HPM
PDL1	820	Lou J Murray (PDL)
KLOC	365	Moeller Electric Pty Ltd
RITT	850	Ritall Enclosures
FRE+	2001	Test Import
WEID	727	Weidmuller

Delete Edit New OK Cancel Close

How it Works

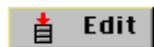
The main aim of this window is to display details about the Vendors. Should you import your own 'Private Vendor' pricing information, you can establish the 'Private Vendor' record.

As stated above, you can have Private Vendors, however, when you are entering a "New" record the Vendor number must be above 2,000 as numbers below 2,000 are reserved for Atad Data.

The short name that becomes part of the combined catalogue number must be 4 characters with the last character being between the ASCII value of 33 and 47, in other words must be one of the following:- ! " # \$ % & ' () * + , - . /



New records can be added as previously explained.

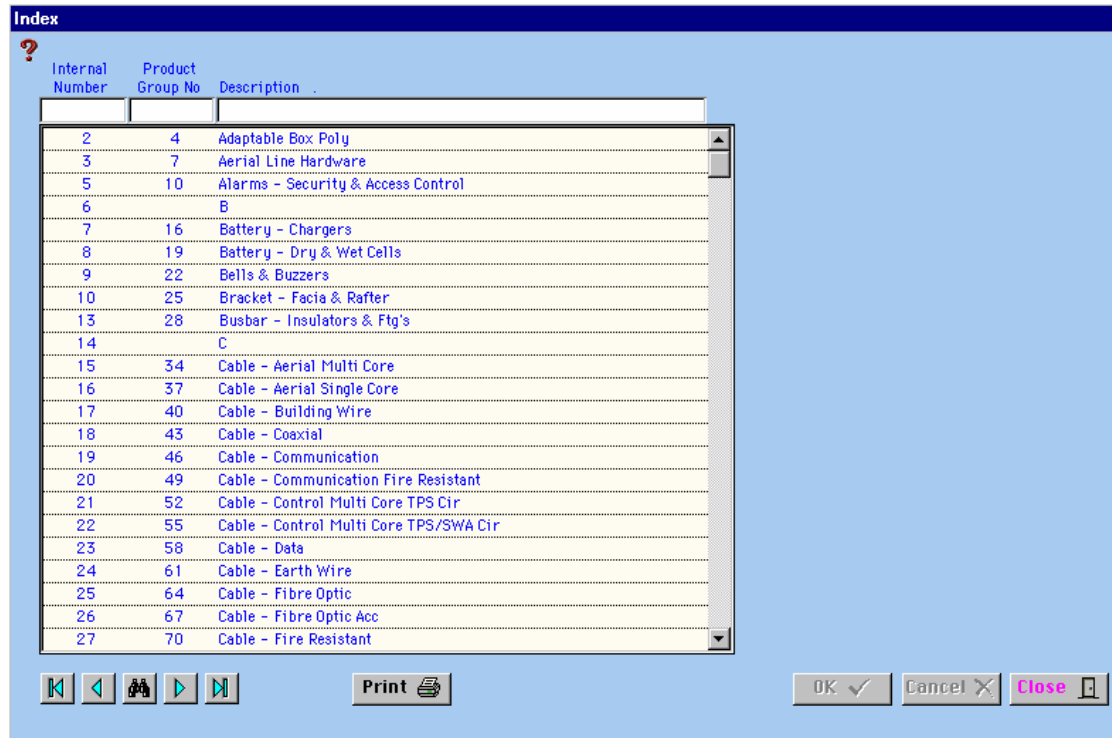


You can modify Private Vendor records.



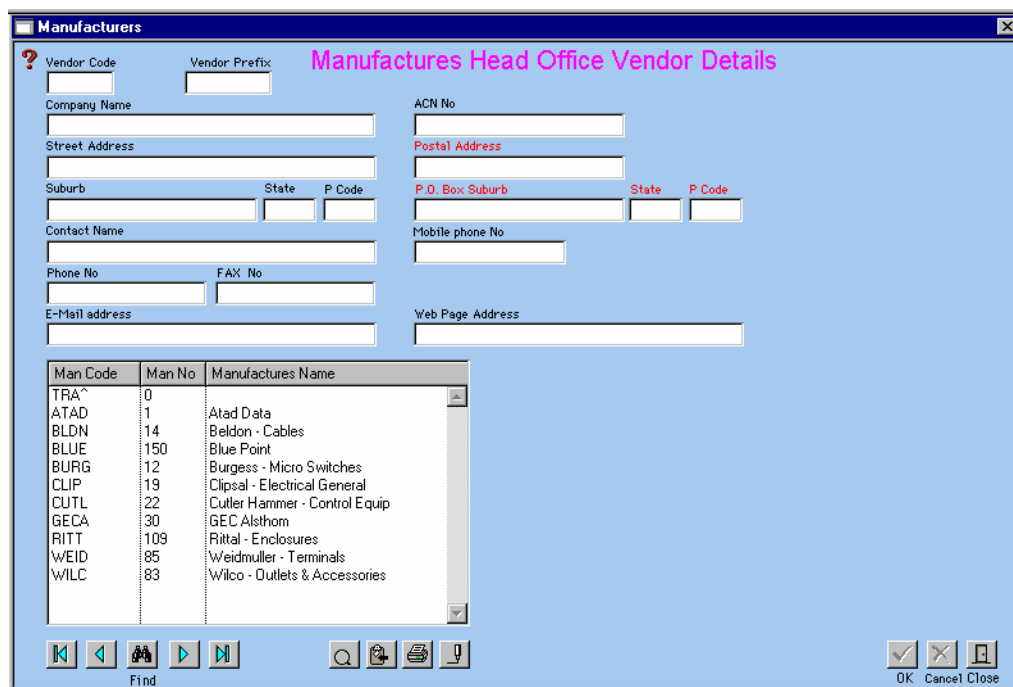
To delete a Private Vendor, once permission is granted, will invoke a procedure that will permanently delete all associated records based on the Private Vendor number.

7.6 Index



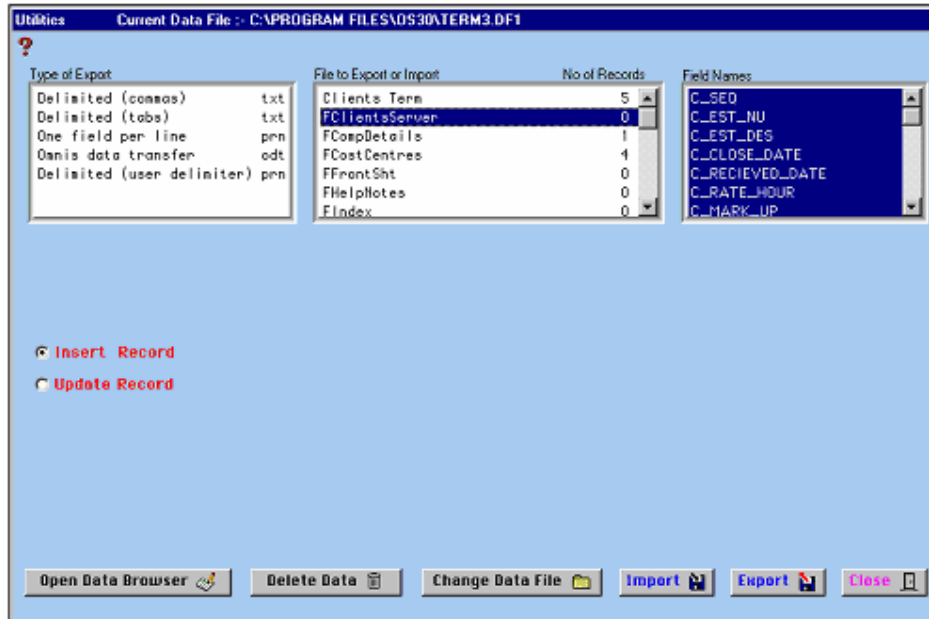
The window displays the contents of the Index. The index is unable to be altered by the user. Atad Data has control of the contents at this stage. Modifications may be made to the program at a later stage so that the user can add Index items for their own Private Vendors price list.

7.7 Manufacturers









The window only offers the user a screen for viewing the information about Manufacturers.

7.8 Utilities



The “**Utilities**” window is the area of the program that looks after your data. There are various reasons for this window as follows:-

-  Export Data
-  Import Data
-  Repair Corrupt Data Files
-  Change Data files
-  Delete Data Files
-  Check how many records you have

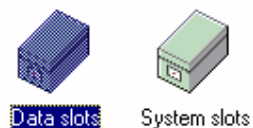
Note: Before you do any minor or major alterations make sure you have a backup.

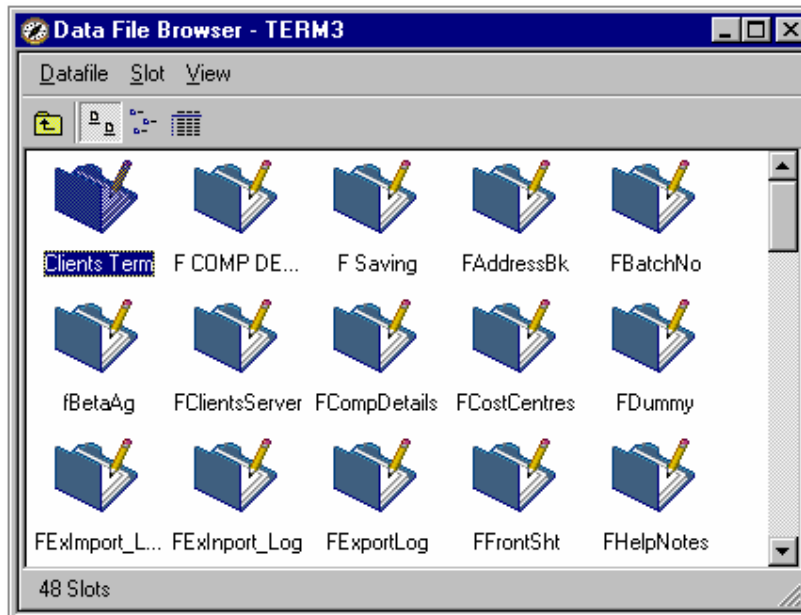
Open Data Browser 

If you need to “**Open Data Browser**” button, this may mean that you may have been instructed to do so by the program or you have encountered corrupted data. When this happens a window will appear with an icon similar to the following:



By double clicking the icon another two similar icons will appear, double click on “Data Slots” and the window should look similar to the following:





Omnis Studio groups all the sub files into one common data file with a suffix, if visible, called "Datafile.df1" for example. All these sub files now appear as individual files and they can be diagnosed for repairs alterations etc.



This icon with extra little red pen represents that the file needs reorganising.



This icon with extra little yellow pen represents that the file needs the data dictionary updated.

Delete Data 

The 'Delete Data' button should be used with extreme caution as this deletes the data permanently from the file and irreversible. To use, highlight the file in the middle list at the top of the page, the names of the fields will appear in the right hand list and then press delete, your data will be deleted.

Change Data File 

This allows for the data file to be changed.

For example, when two (2) Estimators want to work on the same estimate simultaneously, the user clicks on the button and a screen will appear prompting for a data file. Locate the Term3.df1 through the network and logon to the other estimators Term3.df1 data file.

Note: Hard drives or folders will have to be set to the share mode before this can happen. The estimator that logs on remotely must bear in mind that they will have to use the same Master List. The remote user will have to log on each day as the system defaults back to the local data file.

Import and Export

Omnis Studio allows for Importing and Exporting of data contained within the files, this can be done in the following different formats:-

- Delimited commas (CSV) and comes with suffix “.txt”.
- Delimited tabs (tabs) and comes with suffix “.txt”.
- One field per line (.prn)
- Omnis data transfer (.odt)
- Delimited (User Delimiter) (.prn)

The most frequently used, if you to want export into a spreadsheet program, would be firstly Delimited tabs and secondly the Delimited commas.

Omnis data transfer is used to export between other systems with the same data structure and is very quick.



To import a file that some one else has created in another Omnis Studio application, so all columns numbers and field lengths and positions should match.

The first step is to select the type of import file from the five (5) types mentioned above by a single click on the line from the top left list field.

Then select the file that you want to import into from the centre list field “File to Export or Import”.

Make sure that you select via the radio buttons the form of import being “Update” or “Insert”.

- Insert Record** These radio buttons are for nominating the type of import required.
- Update Record**

Then click on the “**Import**” button, you will prompted to select a file, when located and selected click on the “**OK**” button. The number of records should change and be displayed in the Centre list field.

Tip

If you want to import information, for example, in the Delimited tabs format, it can be easier to export some data as a sample, then read it in another application such as a spreadsheet. This will give you the column layout.

Information

The “Update” can be tricky if the information is not perfectly coordinated from the start, as it uses the RSN (Record Sequence Number) to do its updates and can cause trouble if records are deleted or added.

Most users delete the existing file and do a complete “Insert” for best results.



To export data in the five (5) types mentioned above. This is generally used for keeping other users up to date with coordinated information. To export select the file type to be used in the left top list field.

Select the file to be exported by clicking on the name in the top Centre list field “File to Export or Import”, if all fields are not required for exporting, then select the fields that are, by using the “Ctrl” key and select method in the top right list field.

You will be prompted to name the file to be exported, so make sure the name is meaningful and the destination is where you want to go to.

Then press the “OK” button, you will receive a number of records exported.

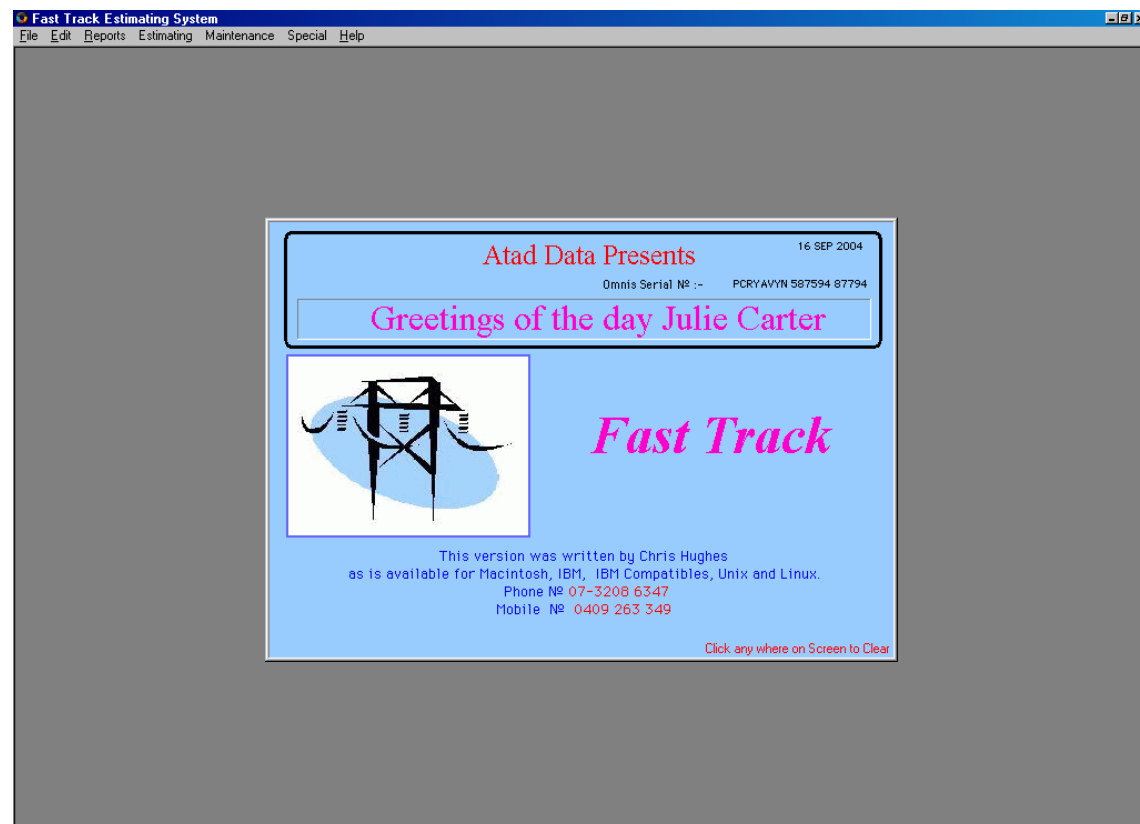
7.9 Fast Track

This gives the user the added convenience to be able to switch to the “**Fast Track Estimating System**” for doing maintenance.

The Estimating programme is called “**Fast Track**”. The file or library name is called “Est-St-3-0.lbs.lbs” and must be in the same location as “**Smart Price**” otherwise this short cut will not work.

The “Fast Track Estimating System” is a more advanced program and has its own manual.

When seen in “Fast Track”, the information is only accessing and reading from the data file called “Copdata.df1”, that must also be in the same location as “Fast Track”.



7.10 Company Details

This window allows for the user to enter their Company Details and automatically opens when the program is first run, there is also a field for entering the location of a folder, this folder acts virtually like an “In Box”.

This folder may be located on a local area server and is only applicable if you have the “Fast Track Estimating System”.

When “Fast Track” opens, it checks to see if there are any incoming data files located in the folder and warns you so that you can take the appropriate action.

Please Change Company Details and Click on OK

System Date

Company Name

Atad Data

Actual Address

Suburb. State P Code

Postal Address

Postal Suburb State P Code

E-Mail Address

Australian Company No (ACN) Australian Business No(ABN) Contact Person

Phone No :-

Fax Number :-

Programme Version :- 100.16

Sys Secondary Serial No

117

Data In Box Location

File Name	No Records
FCompDetails	1
FEstimate	10
FEstimateNo	2
FExInport_Log	40
FIndex	527
FLimit	0
FManufacturers	96
FRecPriceInfo	171725
FTransport	0
FVendors	39

Print OK Cancel

Notes