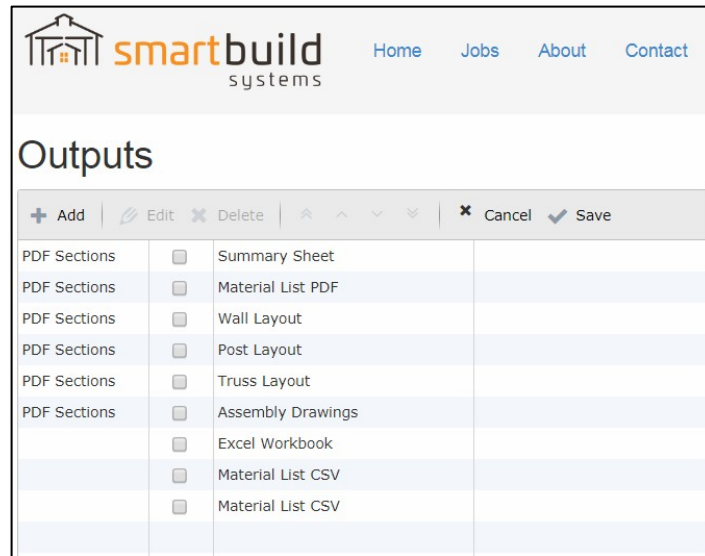


Step 6: Customize Outputs

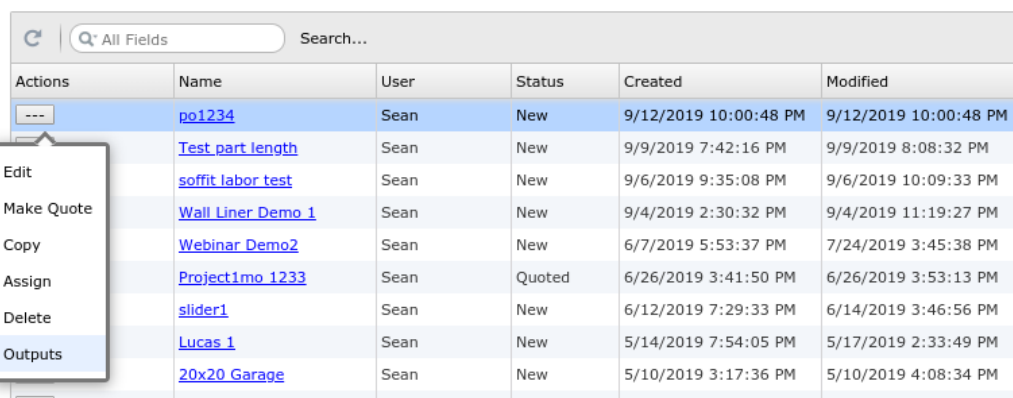
The process of setting up your SmartBuild outputs is dedicated to the customization of your materials lists, layout diagrams, assembly diagrams and other materials. Outputs can be provided in PDF, Excel, Word, DXF, and Sketchup formats.



SmartBuild Outputs

To access the job outputs available in the system for any given job, either click on 'Outputs' for a job from the Home page. Or click on the Jobs page, find the job and choose Outputs from the Actions drop down.

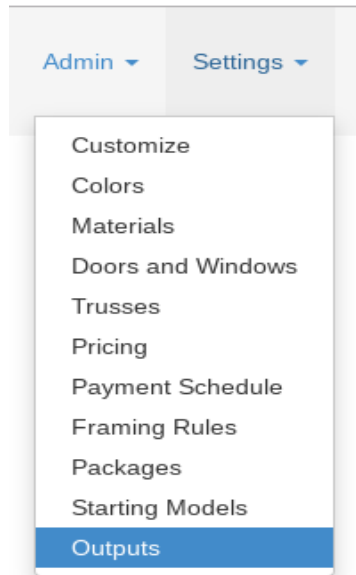
Jobs



Actions	Name	User	Status	Created	Modified
---	po1234	Sean	New	9/12/2019 10:00:48 PM	9/12/2019 10:00:48 PM
	Test part length	Sean	New	9/9/2019 7:42:16 PM	9/9/2019 8:08:32 PM
	soffit labor test	Sean	New	9/6/2019 9:35:08 PM	9/6/2019 10:09:33 PM
	Wall Liner Demo 1	Sean	New	9/4/2019 2:30:32 PM	9/4/2019 11:19:27 PM
	Webinar Demo2	Sean	New	6/7/2019 5:53:37 PM	7/24/2019 3:45:38 PM
	Project1mo_1233	Sean	Quoted	6/26/2019 3:41:50 PM	6/26/2019 3:53:13 PM
	slider1	Sean	New	6/12/2019 7:29:33 PM	6/14/2019 3:46:56 PM
	Lucas 1	Sean	New	5/14/2019 7:54:05 PM	5/17/2019 2:33:49 PM
	20x20 Garage	Sean	New	5/10/2019 3:17:36 PM	5/10/2019 4:08:34 PM

Customize System Outputs

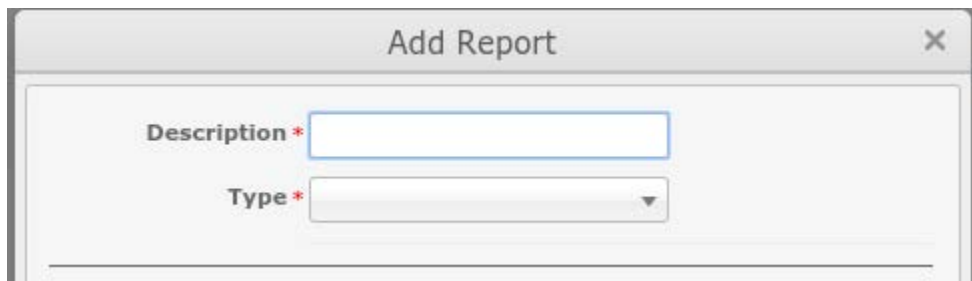
The job outputs available in the system can be customized at the Administrative level. To access the customization of system Outputs go to Settings/Outputs:



To make an Output available in the system, click on the 'Add' button.



You can choose a Type of Output (see below for full list) and you can either use the system default Description or enter your own unique description for the Output.

A screenshot of a dialog box titled 'Add Report'. It contains two fields: 'Description *' with a text input field, and 'Type *' with a dropdown menu. The dialog box has a close button (X) in the top right corner.

Once you select a Type and give the output a Description click Save, then it will be added to the list of available outputs, and once you Save the Output List then the output will show up system wide as an available job output. In the Settings Output list, if you check the box next to an output, then that output will be checked on by default when you choose to Download Outputs for a job (if not checked then the output type will need to be manually checked on when outputting for a job).

+ Add Edit Delete ^ ^ v v * Cancel Save			
PDF Sections	<input checked="" type="checkbox"/>	Cross Sections	
PDF Sections	<input type="checkbox"/>	Sheathing Drawings	
PDF Sections	<input type="checkbox"/>	Wall Layout	
PDF Sections	<input type="checkbox"/>	Post Layout	
PDF Sections	<input type="checkbox"/>	Assembly Drawings	
PDF Sections	<input type="checkbox"/>	Summary Sheet	

There are several different Types of Outputs. Depending on the type of output, you can customize the file type and the information that is included with the output. See below for details on each type. You can add zero or as many outputs as you like.

SmartBuild Output Types

Summary Sheet- A single page PDF output with Job Information and 3-d Images

Job Data PDF- The is a PDF output of all Job Data in a grid format. You can customize what is included in this grid by checking boxes and defining specifications according to the following options available for customization:

- If 'Include Job Infos' is checked then the Job Information tab will be included in the output.
 - In the 'JobInfos' text box you can customize which Job Info fields are output, their order and the heading.
 - If you leave 'JobInfos' blank then all Job Information will be included as shown in the Job Information tab with the field names as the heading,
- If 'Include Materials' is checked then the file will include job materials (if uncheck job materials will not be included).
- Checking 'Ignore Usage' will consolidate like job material entries regardless of their usage (i.e. a pick list). If unchecked then job materials will be consolidated by Usage.
- 'Omit Category Groups' will combine all entries into one list. If unchecked then materials will be separated by material group (like Framing, Sheathing, Trim....)
- 'Group Addons' will keep materials input with a Door, Window or Cupola through the Add-ons feature (items like locks, door knobs, hardware etc.) grouped with the Door, Window or Cupola. If unchecked the 'Addons' materials will listed separately as individual material items.

Wall Layout- PDF and/or DXF output available

Post Layout- PDF and/or DXF output available

Truss Layout- PDF and/or DXF output available

Cross Sections- PDF and/or DXF output for all eave walls

Assembly Drawings - Wall and Roof framing drawings. PDF and/or DXF output available

Sheathing Drawings -Wall and Roof siding drawings. PDF and/or DXF output available

Excel Workbook - Outputs an Excel file format with 3-d images, categorized total costs/price and a breakdown of cost and price for all materials in a job.

Job Data CSV - This operates similar to the Job Data PDF output (see above for all customization options). In addition the CSV has the following option:

- 'Omit Header Row' This will leave out the header row, so the only output will be the entries themselves (this is required for interfacing with some accounting systems)

Epicor Output will output two files, a DMT import file and a CSV configurator file. This file can be customized with the following options:

- '*Epicor Columns*' text box allows you to enter the columns required for the Epicor DMT file output. Customize columns, their order and their headings with a comma-separated list in the format of: field:heading,field:heading<optional>,....
 - Example:
Company,CustomerCustID:CustomerCustID,OrderNum,ProjectName:PONum,RequestDate,NeedByDate,linenum:OrderDtl#OrderLine,fullSku:OrderDtl#PartNum,description:OrderDtl#LineDesc,qty:OrderDtl#SellingQuantity
- '*Configurator Columns*' allows you to define columns for the sheathing details list in the configurator file output. Customize columns, their order and their headings in the format of: field:heading,field:heading,....
 - Example:
fullSku:Sku,description:Description,colorName:Color,qty:Qty,lengthStr:Length
- '*Header Columns*' allows you to define columns for the 'headers' section of the configuration file. (see Header SKU Prefix below). Customize columns, their order and headings in the format of: field:heading,field:heading,...

- Example: description:Description,extPriceStr:Price
- *'Header SKU Prefix'* allows you to exclude materials from outputting to the DMT file but included in the configurator file. These materials will show up in the 'Headers' section of the Configurator file output. If you append any material SKU in your database with MISC, INFO or SPEC then this material will be excluded from the DMT file and be listed in the 'Headers' section of the Configurator file.
 - Example: MISC_,SPEC_,INFO_

Document Template- Word compatible job file generated from a Word generated template document uploaded into SmartBuild. This allows you to upload one or many Word generated templates that will output Word compatible job documents like proposals, quotes or any other documents. The template can include logos, formatting and integrate special place holders for Total Price, Job Information, many building specifications, 3-D images and more. The template is used to generate job specific document outputs. (See Video for details on set-up, upload and download of document templates).

JSON file- Job data export in Json format. The file can be used to communicate with other web based applications.

EZM file- SmartBuild compatible job file.

SketchUp .SKP- Full job 3-d geometry output in SketchUp compatible file output.

Below are links to some SmartBuild Training Videos dedicated to this process.

[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.](#)