
SmartBuild

Quick Start User's Guide



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Purpose

The purpose of this document is to provide new users with the essential information needed to get up and running with SmartBuild quickly and successfully. Mastering a few basic skills in SmartBuild will provide you with the ability to:

- Design a post frame building using preexisting templates or from scratch
- Generate bids with incredible speed and accuracy
- Automatically create material lists and pricing
- Automatically submit orders to your Supplier/Distributor
- Automatically generate a comprehensive set of *Layout, Elevation, and Assembly drawings*

Gaining Access to SmartBuild

By now, you have received the go-ahead from your organization's SmartBuild Systems Administrator to Log in to SmartBuild. Your Systems Administrator may have provided you with a Username and Password that he/she has created for you, or you may be instructed to complete the SmartBuild Registration process yourself. If you have been provided with a Username and Password, skip down to the section [below](#) entitled, *Logging in to SmartBuild*. If you will be completing the Registration process yourself, please see the section immediately following.

REGISTERING AS A NEW USER

Complete the following steps to register as a new SmartBuild user:

1. If you have received an email inviting you to register as a SmartBuild user, click on the link provided in that email. Otherwise, open your web browser and enter <https://postframesolver.azurewebsites.net/Account/Login> in the browser's address bar.
2. The SmartBuild Log in window will open. Click on Signup, as pictured below in Figure 1.

smartbuild systems

Home About Contact Register Log in

Log in

Username or Email Address

Password

The Password field is required.

 Remember me?

Log in

Don't have an account? [Signup](#)

[Forgot password?](#)

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Version 1.72.1.3

Figure 1: Click on Signup in the SmartBuild Log in window to create a new account.

3. A Registration page will open, like the one pictured in Figure 2 below.

smartbuild systems Home About Contact Register Log in

Welcome to SmartBuild for
[Your Company Name]

If you're a returning user, click [here](#) to log in.

Email

User Name

Company Name

Phone Number

Password

Confirm password

The Password field is required.

Register Now

Figure 2: The SmartBuild Registration page.

Complete the fields in the Registration window as follows:

- A. **Email** – Enter the Email address that you will use to send and receive all SmartBuild-related correspondence.
 - B. **User Name** – Enter your preferred SmartBuild User Name, as it will appear throughout the application. Your User Name is not case sensitive and spaces are permitted. Please do not use any of the following characters as they may interfere with the proper functioning of SmartBuild: ! @ # \$ % ^ & *
 - C. **Company Name** – Enter the name of your company. If you have been invited to register via an email link, this field will already be filled in for you.
 - D. **Phone Number** – Enter the primary telephone number you will use to communicate with SmartBuild.
 - E. **Password** – Enter a secure Password for your SmartBuild account. Your Password is case sensitive and must contain a minimum of six (6) characters.
 - F. **Confirm Password** – Re-renter your password precisely as you entered it in the Password field, to confirm your typing.
4. Once you have entered the required information, click on the Register Now button at the bottom of the window. This completes the Registration process. SmartBuild will send an email to the address you entered on the Registration page, that will provide you with a link to the SmartBuild Log in page.

LOGGING IN TO SMARTBUILD

As a new or returning user, you will need to **Log in** to SmartBuild at the start of each day (or after each time you **Log out**). Please take a moment to review the parts of the **Log in** window as shown in Figure 4, and outlined below:

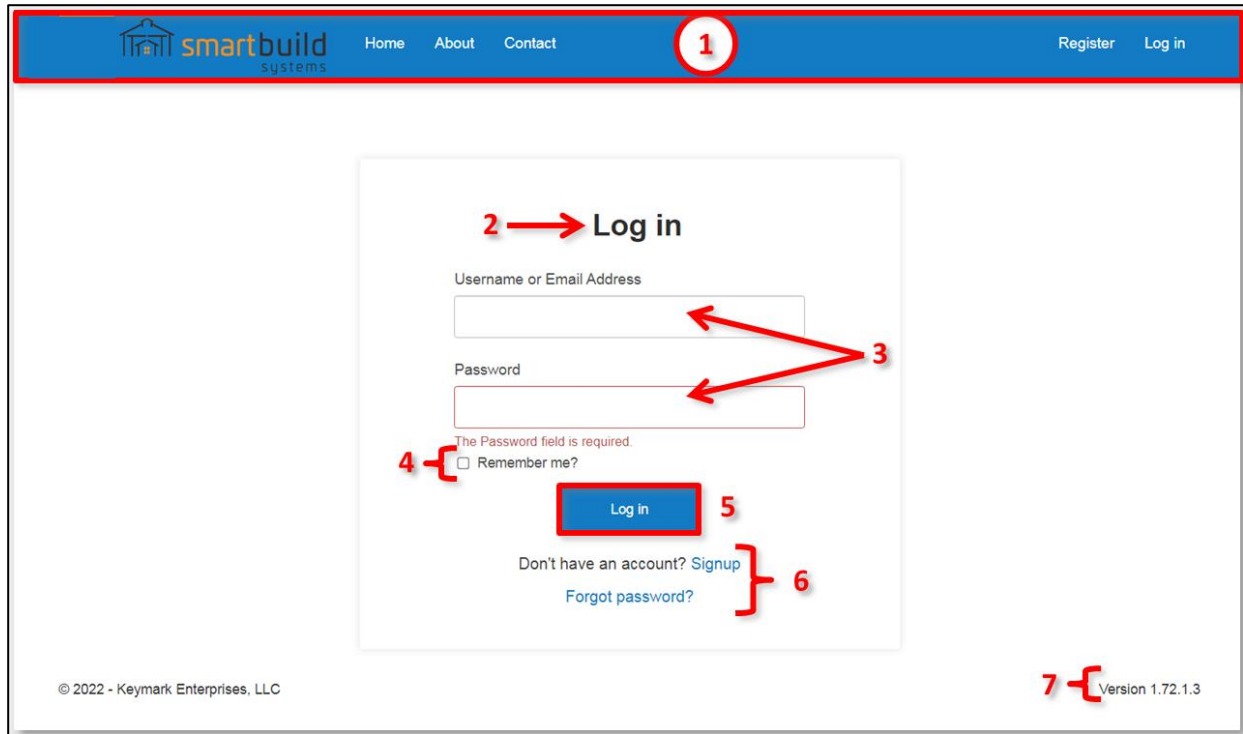


Figure 3: Parts of the SmartBuild Log In window.

1. **Links Menu** – The *Links Menu* provides quick access to commonly used navigation hyperlinks.
2. **Page Header** – Each window in SmartBuild includes a *Page Header* that lets users know where they are within the application at any given moment.
3. **Name and Password Fields** – These are the fields in which you will enter your **Username** (or **Email Address**) and **Password** credentials in order to gain access to the application.
4. **Credentials Checkbox** – Enabling this checkbox will cause SmartBuild to save your **Log in** credentials, so that the **Username** and **Password** fields are completed automatically during all subsequent logins.
5. **Log in Button** – Once you have entered your **Username** and **Password**, click on the **Log in** button to complete the process.
6. **Task Prompts** – These links will take you to the appropriate pages if you need to register as a new SmartBuild user, or if you have forgotten your SmartBuild password.
7. **SmartBuild Version Number** – This number reflects the version of SmartBuild you are currently using.

After you have entered your **Username** or **Email Address**, and **Password**, when you click on the **Log**

in button, SmartBuild will take you to your personalized *Homepage*. Read on for further information.

Parts of the SmartBuild Homepage

After each successful Log in, the first SmartBuild page you will see is your customized *Homepage*. (See Figure 4 below.) Please take a moment to review the parts of the *Homepage*.

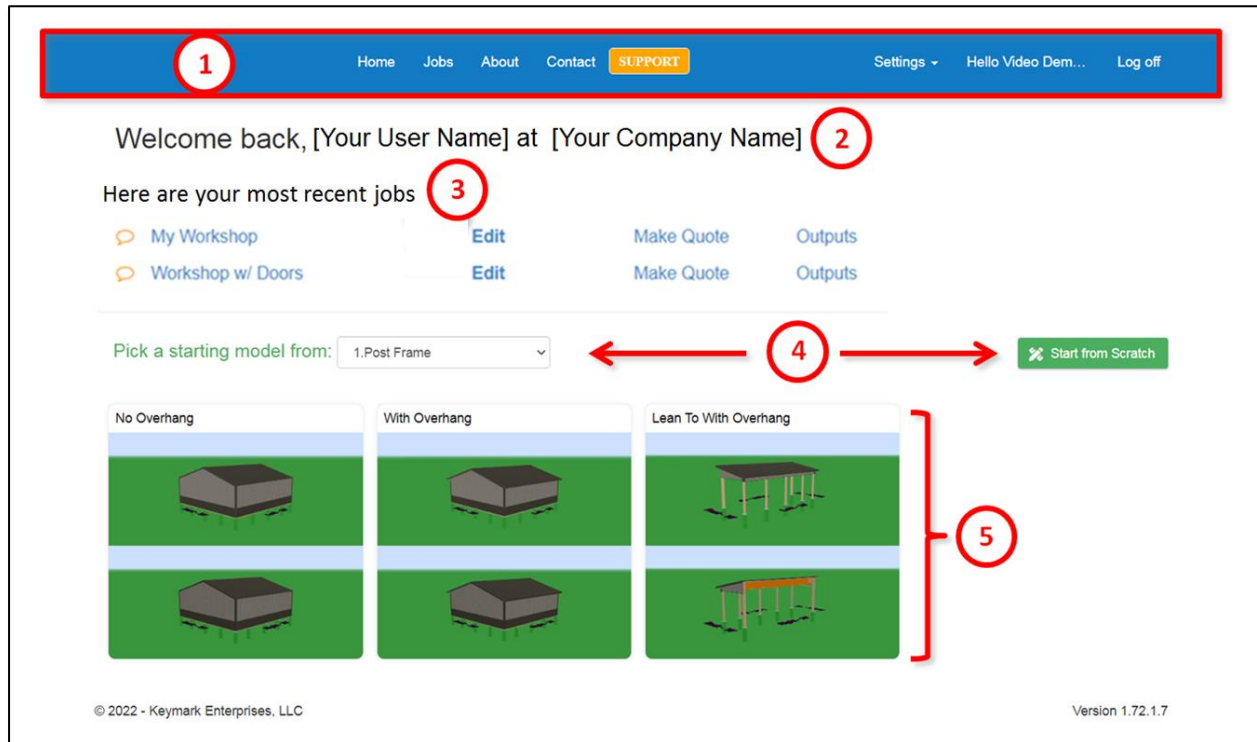


Figure 4: The SmartBuild Homepage.

1. **Links Menu** – The *Links Menu* provides quick access to commonly used navigation hyperlinks.
2. **Page Header** – The *Page Header* is used to indicate where you are within the application.
3. **Recent Jobs** – This section of your *Homepage* will display up to nine (9) of your most recent jobs.
4. **Start Options** – With these options, users can elect to create a new model by using a preexisting template, or you can *Start from Scratch*.
5. **Template Choices** – The *Templates* section of the *Homepage* provides thumbnail pictures of the various templates from which you can choose. The templates displayed here will vary, depending on the value selected in the *Pick a starting model from* drop-down list just above. In this example, the user has six post frame building templates from which to choose.

Creating a New Job

As mentioned above, there are two ways to create a new job in SmartBuild: using a template, and *Start from Scratch*. Templates have the advantage of speed. If there is a template that provides the basics for the type of structure you are looking to design, a template will keep you from having to “reinvent the wheel.” For truly unique and/or complicated structures, you can begin your design process with a clean slate. For our purposes here, we will create a new job using a template. Please see *Creating a New SmartBuild Job from Scratch* for further information on this more advanced design process.

Each organization will have its own unique drop-down list and collection of building templates from which to choose, so we will speak in extremely general terms here. Complete the following steps to create a new job using an existing template:

1. From your SmartBuild *Homepage*, click on the drop-down arrow pictured in Figure 5, to select the category of the structure you wish to build. In our example below, we have three categories of buildings from which to choose: *Ag* (Agricultural), *Garage*, and *Workshop*. (The specific categories of available templates will vary by organization.) For our example here, we will choose *Ag* from the drop-down list.

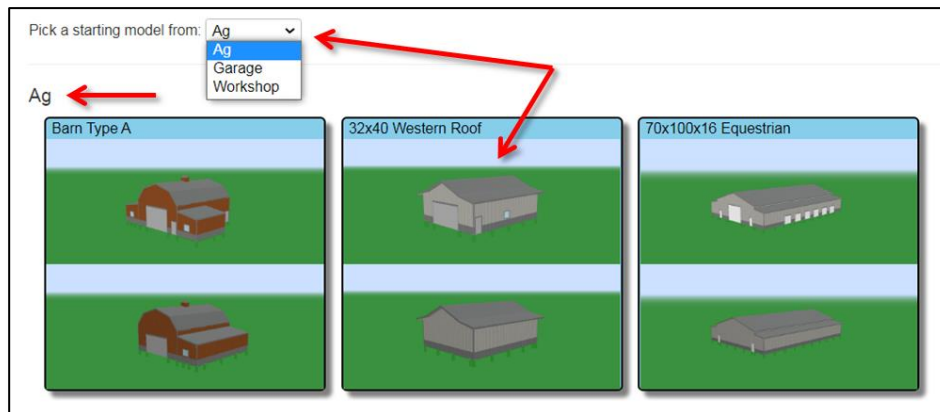


Figure 5: The *Template* drop-down list.

2. From the list of agricultural building templates, we will click on the desired building template. That's it! Once you click on the desired template, SmartBuild will work behind the scenes to create your new model and all of its associated *Outputs*.

- When your model is ready, it will open in the SmartBuild *Create Job* window, with the name "Untitled" as pictured in Figure 6 below. As you can see, there is a lot happening on this page. We are going to cover all the details a little later. Here, we will simply complete the process of assigning this job a name and saving it using the *Properties Tabs*.

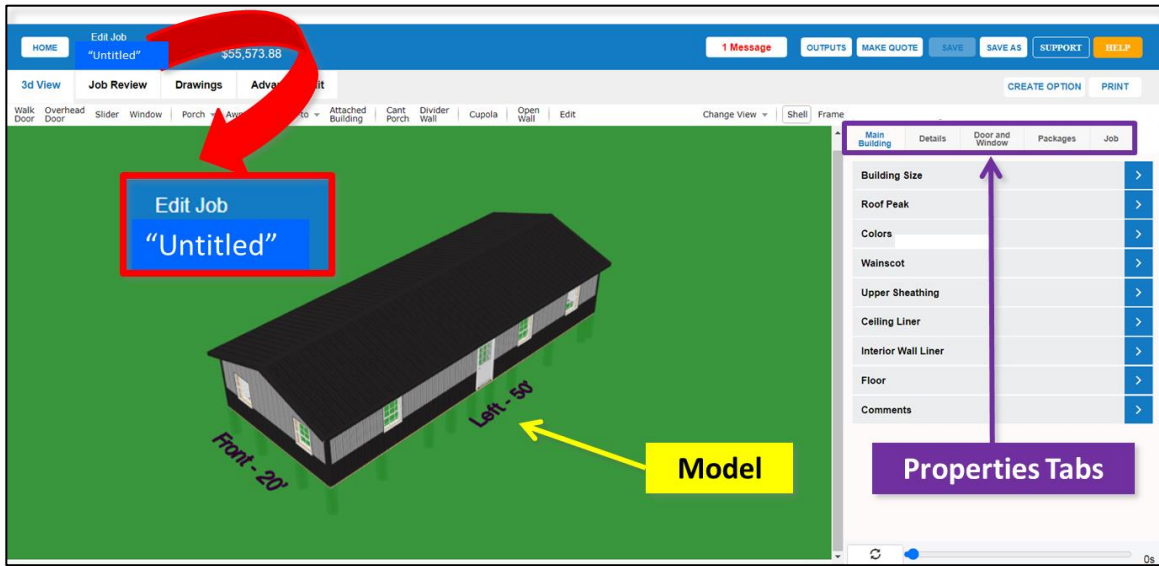


Figure 6: Use the Job Properties Tab to assign a name to your new job.

- To give your new job a name, click on the Job tab in the Properties Pane, on the right side of the window, as pictured in Figure 7 at right.
- In the Name field of the Job tab, type in an appropriate name for your new job. Spaces are permitted, however, please do not use any of the following characters as they may interfere with the proper functioning of SmartBuild:
! @ # \$ % ^ & *
- Once you have typed in a name for your new job, click on the Save button at the top of the window. That's it! Your new job Name has been saved. Click on the Home button at the top of the page to return to your Homepage.

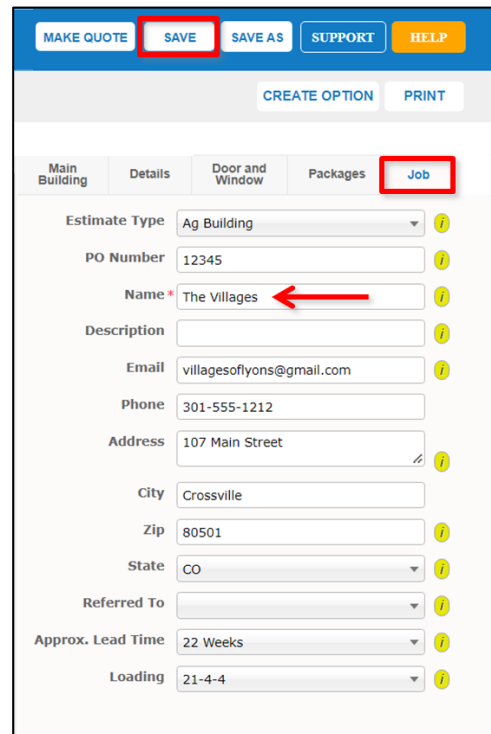


Figure 7: Type in a Name for your new job on the Job Tab.

The Jobs List

The SmartBuild *Jobs List* page provides users with a comprehensive list of all the jobs entered into the system. This page is used to review, edit, and manage all jobs collectively. To open your *Jobs List* page, Log in to SmartBuild and, from your *Homepage*, click on the *Jobs* link in the *Links Menu* at the top of the page. Your *Jobs List* page will open, similar to the one shown in Figure 8, below. Let's take a moment to review the various parts of the *Jobs List* window:

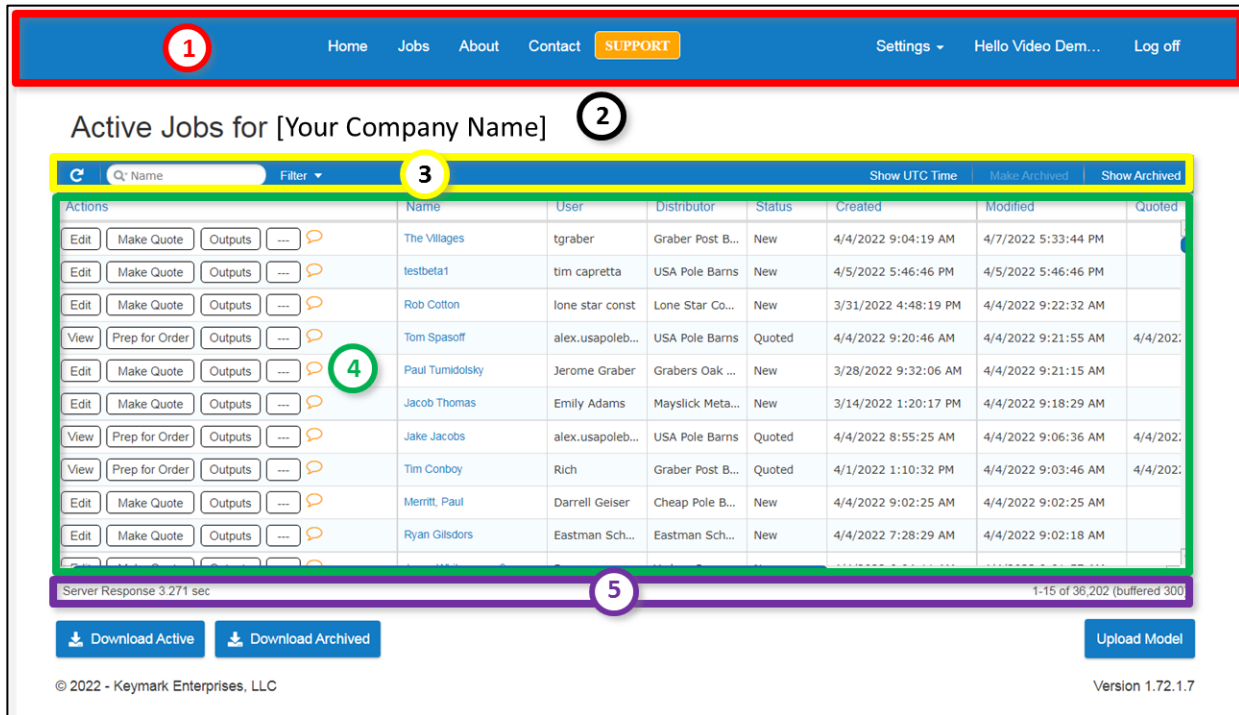


Figure 8: The SmartBuild *Jobs List* page.

1. **Links Menu** – A *Links Menu* appears at the top of the SmartBuild *Jobs List* page to provide quick access to relevant pages and functions.
2. **Page Header** – The *Page Header* lets you know where they are within the application at all times. Note that the *Page Header* in Figure 8 says “Active Jobs.” In a moment, we will show you how to toggle this list to *Archived* (completed) jobs.
3. **Jobs Search Bar** – The *Jobs Search Bar* is used to refresh the *Jobs List* window, search for keywords, filter search results by selected criteria, and toggle between *Active* and *Archived* jobs.
4. **Jobs Table** – Each row in the *Jobs Table* represents a unique project, with its own model and outputs. The leftmost column in the table provides a list of available command buttons, used to execute various actions for a job. The remaining columns to the right provide basic high-level management information about each job.
5. **Status Bar** – The *Status Bar* at the bottom of the *Jobs List* window shows server response times and the total number of rows (jobs) that exist in the table.

Edit an Existing Job

To make changes to the design, materials, pricing and/or labor for a job, perform the following actions:

1. Log in to SmartBuild.
2. On your *Homepage*, click on the *Jobs* button at the top of the page. Your *Jobs List* page will open.
3. Locate the desired job on your *Jobs List* and, in the *Actions* column for that job, click on the *Edit* button.
4. The selected job will open in the SmartBuild *Edit Job* page like the one shown in Figure 9 below. There is a lot to see and do on the *Edit Job* page, however, before we get started, the very first thing we need to talk about are the *Edit Job Modes*.

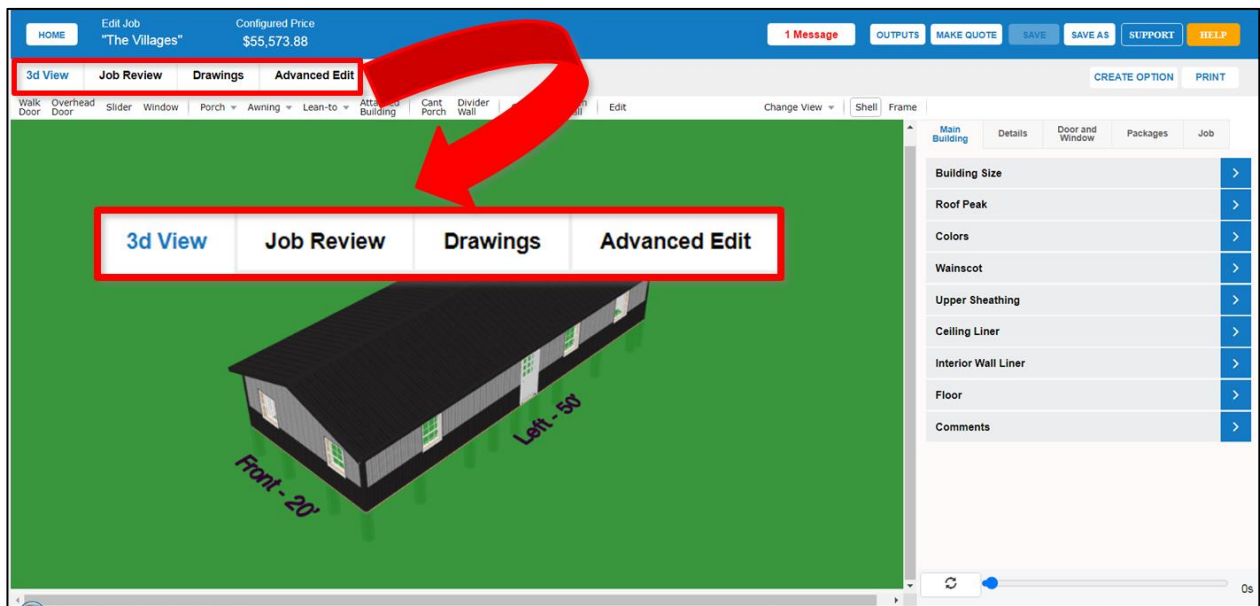


Figure 9: Mode Controls on the *Edit Job* window.

MODE CONTROLS

Since there so many different aspects of a job that may require modification, the *Edit Job* page provides users with four different *Modes*, each focused on modifying different aspects of a job. The features and functions available on the *Edit Job* page will differ, depending on which of these four *Modes* is selected.

We have provided a screen capture and brief description of each of these *Modes* on the following pages. As you will see in Figures 10-13 each *Mode* of the *Edit Job* page differs somewhat in appearance.

3D VIEW MODE

When you open a job on the *Edit Job* page, it will open in *3D View Mode* by default. In *3D View Mode*, the *Display Pane* shows a 3D model of your building that can be rotated and viewed from any angle. (See Figure 10 below.) In addition, *3D View Mode* is used to add, move, delete, and modify openings (doors and windows) and building additions (porches, awnings, lean-tos, etc.) to your structure. Please click [here](#) for detailed information about *3D View Mode*.

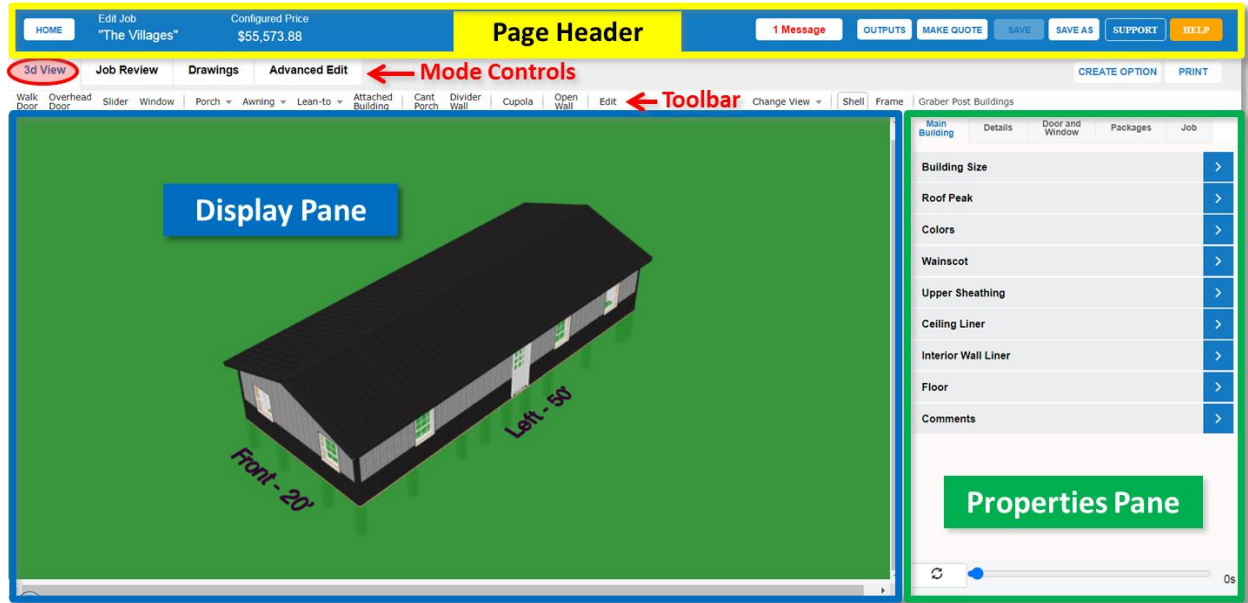


Figure 10: The primary sections of the *Edit Job* window in *3D View Mode*.

JOB REVIEW MODE

Job Review Mode provides users with both high-level summary and detailed information about the Materials, Labor and Freight required for a job. Please click [here](#) for detailed information about *Job Review Mode*.

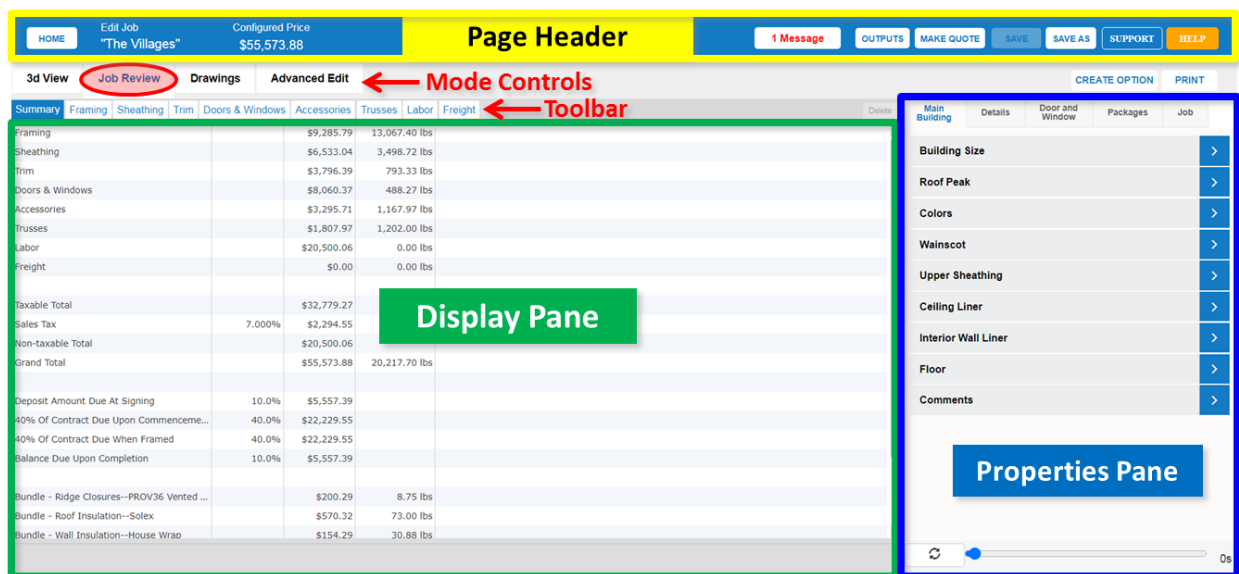


Figure 11: The *Edit Job* page opened in *Job Review Mode*.

DRAWINGS MODE

Drawings Mode provides users with a comprehensive set of “read only” Wall, Roof, Post and Truss Layout drawings for a job, along with Elevation and Assembly drawings. A drawing of the selected component is shown in the *Display Pane*, along with a grid of information about the associated material requirements for that component. (E.g. SKUs, materials, quantiles, lengths, and so on.) Please click [here](#) for detailed information about *Drawings Mode*.

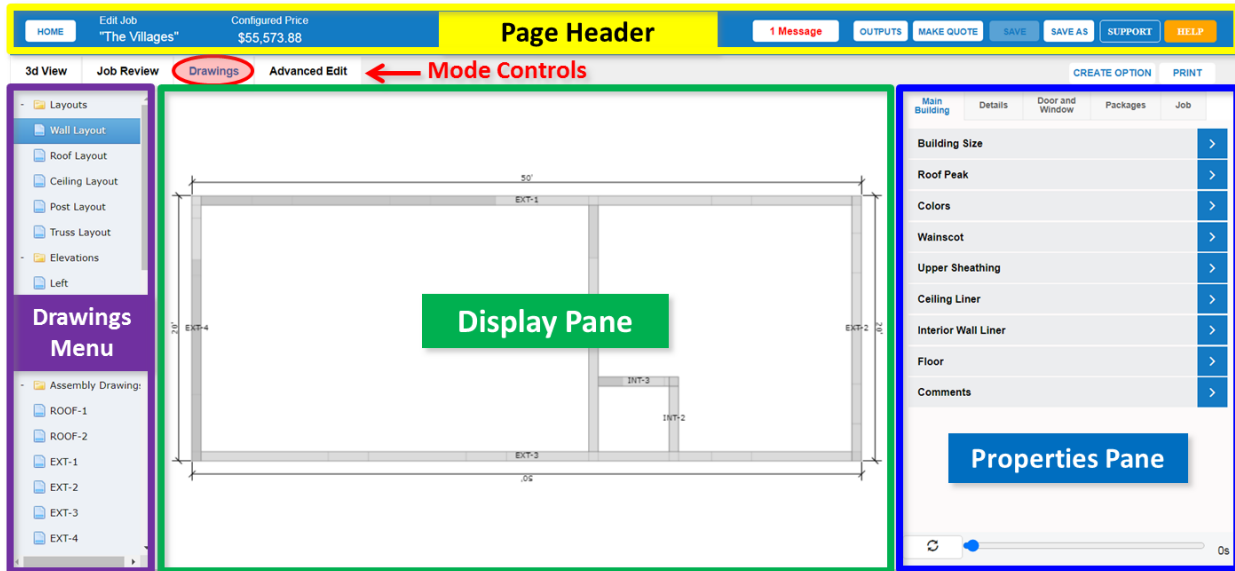


Figure 12: The *Edit Job* page opened in *Drawings Mode*.

ADVANCED EDIT MODE

Advanced Edit Mode is used to make changes to individual roof and wall panels, and their associated trim. In addition, *Advanced Edit Mode* displays roof, wall and panel drawings for both the *Frame* and *Shell*. Please click [here](#) for detailed information about *Advanced Edit Mode*.

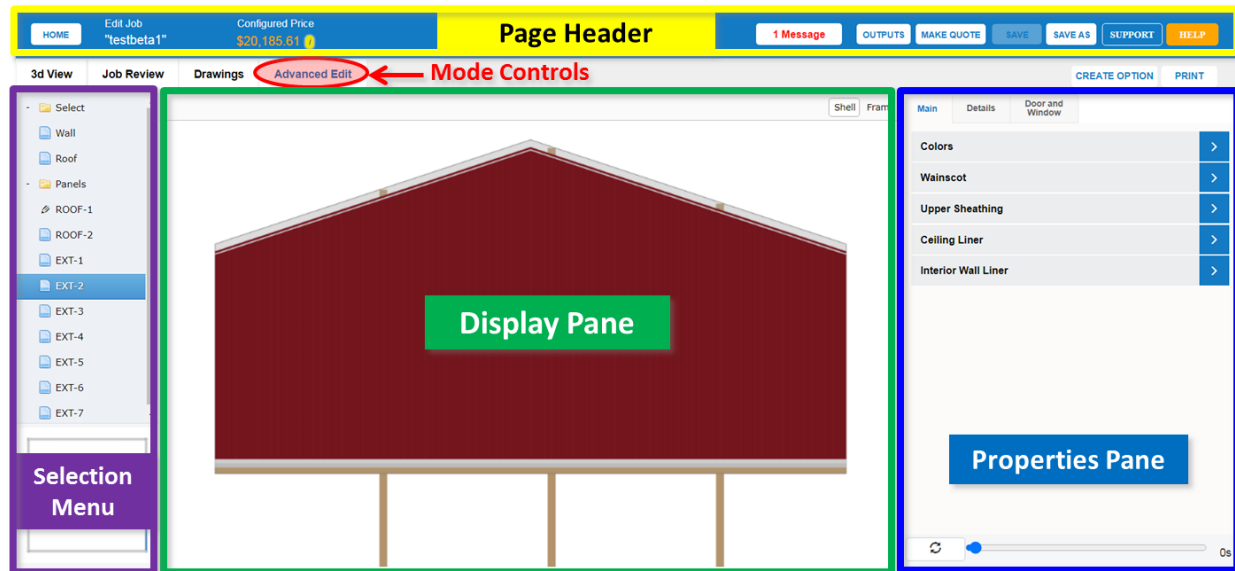


Figure 13: The *Edit Job* page open in *Advanced Edit Mode*.

PARTS OF THE EDIT JOB WINDOW

As you can see in Figures 10–13 on the preceding pages, the *Edit Job* window is divided into three basic sections: the *Page Header* (top), *Display Pane* (bottom left), and *Properties Tabs* (right). The following is a brief description of the primary functions of each of these sections:

- **Page Header** – The *Page Header* displays that you are on the *Edit Job* page, the Job Name, and a variety of frequently used commands (Job Controls). The contents of the *Page Header* are identical in all *Modes* except *3D View*, which adds *View Controls* and the *Openings and Building Additions Toolbar*. (See Figure 14 below.)
- **Display Pane** – Depending on which of the three *Edit Job Modes* is currently selected, the *Display Pane* will show different images and sets of data.
- **Properties Tabs** – A series of tabs used to define a broad array of properties for your building.

USING THE PAGE HEADER

As pictured in Figures 10–13 on the preceding pages, the SmartBuild *Page Header* sits at the top of every *Edit Job* window, regardless of the *Mode* that is selected. Each *Page Header* provides quick and easy access to frequently needed information and commands. As mentioned previously, the *Page Header* is identical for all *Edit Job Modes*, except for *3D View Mode*, which adds *View Controls* and the *Openings and Building Additions Toolbar* to the list of available commands. (See Figure 14 below.)

Covering every aspect of the *Command Bar* is beyond the scope of this document. For our purposes here, we will provide a high-level overview of the most important aspects of the *Command Bar*, and include links to more detailed documents for those seeking further information.



Figure 14: The *Command Bar* at the top of the *Edit Job* window in *3D View Mode*.

Page Header

We point out the *Page Header* here, because every page in the SmartBuild application includes a *Page Header* to let you know precisely where you are within the application at all times.

Mode Controls

See pages 10-12 for information about *Modes* and *Mode Controls*.

Job Controls

In the top right-hand corner of the *page Header* are the *Job Control* buttons, along with the icon for SmartBuild's *Integrated Help System*. Following is a brief summary of these buttons and their associated functions:

- **Print** – Clicking on the `Print` button will download the current contents of the *Display Pane* in PDF format, which the user can then `Print`.
- **Home** – Clicking on `Home` button will return the user to his/her SmartBuild *Homepage*.
- **Outputs** – Clicking on the `Outputs` button opens the *Download Outputs* dialog box, like the one pictured in [Figure 15](#) at right. Note that the specific outputs available will vary by company. All `Outputs` for a job are available immediately once SmartBuild has generated a 3D model.
- **Make Quote** – Once you are satisfied with the design, materials, and pricing for a job, you will click on the `Make Quote` button to lock-down the price and configuration. This will also change the job's status to "Quoted." (Don't worry; you can always requote a job if changes need to be made after you've clicked on the `Make Quote` button.)
- **Save** – Click on the `Save` button to preserve any changes you have made to a job. We recommend you click the `Save` button early and often while you are working!
- **Save As** – The `Save As` button is used to create an identical copy of the current job.

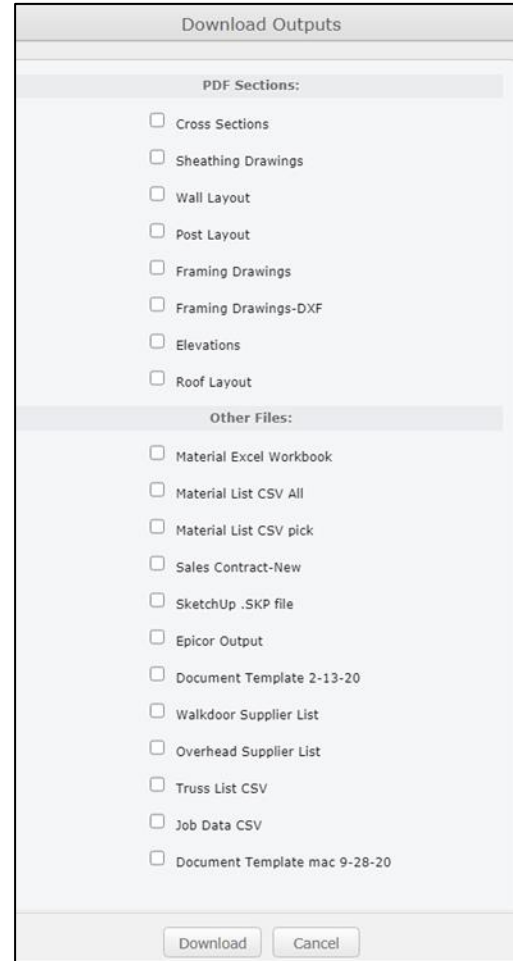


Figure 15: The Outputs dialog box.

Integrated Help System

Accessible from the *Page Header*, SmartBuild's *Integrated Help System* provides users with context-sensitive assistance that targets the specific tasks at hand. To get the most out of this important feature, we highly suggest you take a moment here to read [Using the SmartBuild Help System](#).

Openings & Building Additions Toolbar

As its name implies, this toolbar is used for adding, moving, editing and deleting openings (doors and windows) and building additions (lean-tos, porches, awnings, etc.) to your structure. For detailed instructions on all these operations, please see [Working with Openings and Building Additions](#).

View Controls

The *View* controls on the *Command Bar* offer fast alternatives for changing perspectives on the 3D model shown in the *Display Pane*:

Change View – The *Change View* drop-down list (Figure 16) provides nine predefined perspectives from which to view your structure. You can also click and drag your mouse in the *Display Pane* to change your view as you see fit.

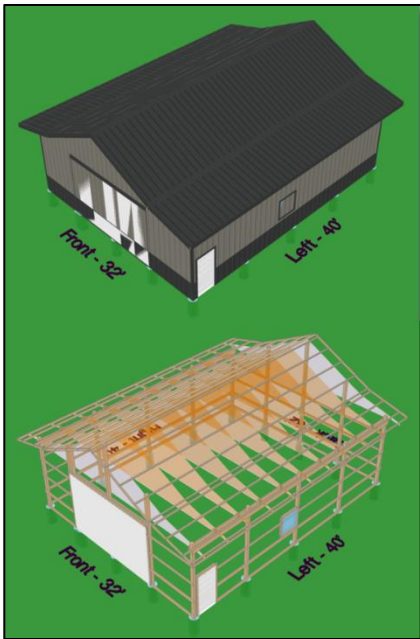


Figure 17: Toggling between view of the *Shell* and *Frame*.

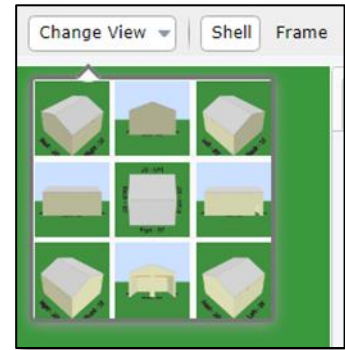


Figure 16: The nine predefined views in the *Change View* drop-down list.

Shell/Frame – As the names imply, the *Shell* and *Frame* command buttons are used to toggle the view of the job between the framing members and the exterior panels and trim that comprise the building's shell.

NOTE – You can quickly view your model from any perspective by clicking and dragging your mouse within the *Display Pane*. In addition, you can use the following keyboard commands to alter your view of the model: ← (scroll left); → (scroll right); ↑ (scroll up); ↓ (scroll down); Page Up (zoom in); Page Down (zoom out).

USING THE PROPERTIES PANE

As can be seen in Figures 10–14, all four *Modes* on the *Edit Job* page include the *Properties Pane* on the right-hand side of the window. The *Properties Pane* offers a series of tabs containing individual fields that, taken collectively, define every aspect of your job. (See Figure 18, below right.) The following is provided as a high-level overview of the tabs contained within the *Properties Pane*, along with a brief description of their functions

Main Building Tab – The *Main Building Tab* defines essential information about the job including Building Size, Colors, Wainscot, etc.

Details Tab – The *Advanced Tab* is used to define and edit a host of properties associated with Framing, Sheathing and Trim.

Door and Window Tab – The *Door and Window Tab* is used to define the trim and framing for all types of openings.

Packages Tab – The *Packages Tab* is used to define optional materials for a wide variety of conditions.

Job Tab – The *Job Tab* contains fields that outline key project information, including everything from the Project Name, Location and Invoice Number, to contact information and key dates associated with the job.

Main Building	Details	Door and Window	Packages	Job
Building Size [v]				
Building Size	Custom Size	[i]		
Width	28'	[i]		
Length	30'	[i]		
Wall Width	5 1/2"	[i]		
Exterior Metal Height	12'	[i]		
Interior Metal Height	9' 6"	[i]		
Roof Style	Gable	[i]		
Roof Pitch	4 / 12	[i]		
Overhangs	None	[i]		
Roof Depth	5 1/2"	[i]		
Colors [>]				
Wainscot [>]				
Ceiling Liner [>]				
Interior Wall Liner [>]				
Comments [>]				

Figure 18: The five tabs in the *Properties Pane* are accessible in all *Modes* on the *Edit Job* page.

Example Edits

When you create a new job, SmartBuild uses the default configuration options specified by your Systems Administrator. Before sending out a quote to your customer, you will likely need to adjust some aspects of the job. Here are a few commonly implemented changes you can use to get started:

CHAGING OVERHANG SIZES

To change the size of Overhangs, perform the following actions:

1. Log in to SmartBuild.
2. From your *Homepage*, click on *Jobs* in the *Links Menu* at the top of the page, to open your *Jobs List* page.
3. On your *Jobs List* page, locate the desired job and click on the *Edit* button for that job in the *Actions* column.
4. With your job now open on the *Edit Job* page in *3D View Mode*, click on the *Main Building* tab in the *Properties Pane* as pictured in Figure 19.
5. On the *Main Building* tab, click on the > sign next to *Building Size* to expand the list of available properties.
6. Click on the down-arrow to expand the drop-down list for the *Overhangs* field, and select the desired *Overhang* size. That's it. As soon as you click your mouse anywhere outside the *Overhangs* field, your changes will be applied. Be sure to *Save* your changes before leaving the *Edit Job* page.

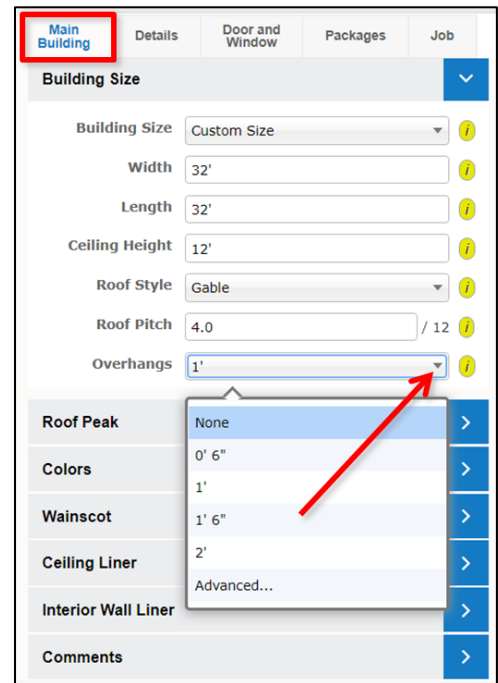


Figure 19: Changing the size of Overhangs in the *Properties Pane*.

CHANGING METAL COLORS

To change the color of the metal used on your Roof, Walls or Trim globally, perform the following actions:

1. Log in to SmartBuild.
2. From your *Homepage*, click on *Jobs* in the *Links Menu* at the top of the page, to open your *Jobs List* page.
3. On your *Jobs List* page, locate the desired job and click on the *Edit* button for that job in the *Actions* column.
4. With your job now open on the *Edit Job* page, in *3D View Mode*, click on the *Main Building* tab in the *Properties Pane*, as shown in Figure 20.
5. On the *Main Building* tab, click on the > sign next to *Colors* to expand the list of available properties.
6. Using the drop-down lists provided, select the new *Roof Color*, *Wall Color* and/or *Trim Color* as desired.
7. When you are satisfied with your changes, be sure to click on the *Save* button at the top of the page.

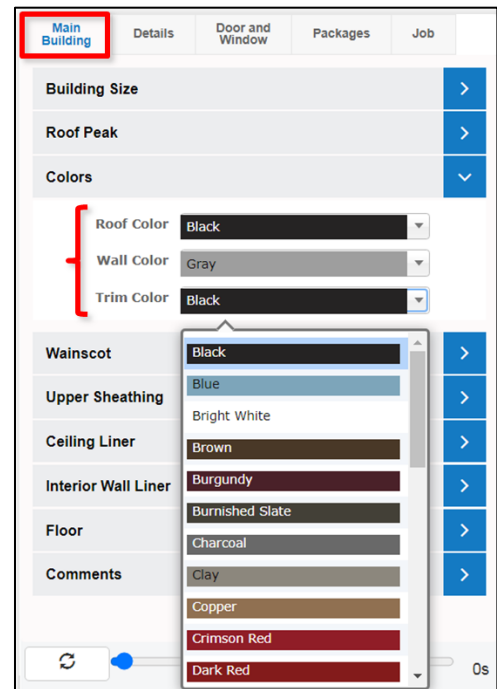


Figure 20: Changing building colors in the *Properties Pane*.

NOTE – As mentioned above, color changes made using the *Properties Pane* in *3D View Mode*, *Job Review Mode* and *Drawings Mode* are applied globally throughout the building. If you wish to change the color of individual wall panels, roof panels and/or trim, you must use SmartBuild's *Advanced Edit Mode*.

CHANGING WAINSCOTTING

To change the Color, Height, or presence of Wainscoting on your building, perform the following actions:

1. Log in to SmartBuild.
2. From your *Homepage*, click on **Jobs** in the *Links Menu* at the top of the page, to open your *Jobs List* page.
3. On your *Jobs List* page, locate the desired job and click on the **Edit** button for that job in the *Actions* column.
4. With your job now open on the *Edit Job* page in *3D View Mode*, click on the *Main Building* tab in the *Properties Pane*, as pictured in *Figure 21*.
5. On the *Main Building* tab, click on the > sign next to **Wainscot** to expand the list of available properties.
6. In the three fields provided, make changes as desired.
7. When you are satisfied with your changes, be sure to click on the **Save** button at the top of the page.

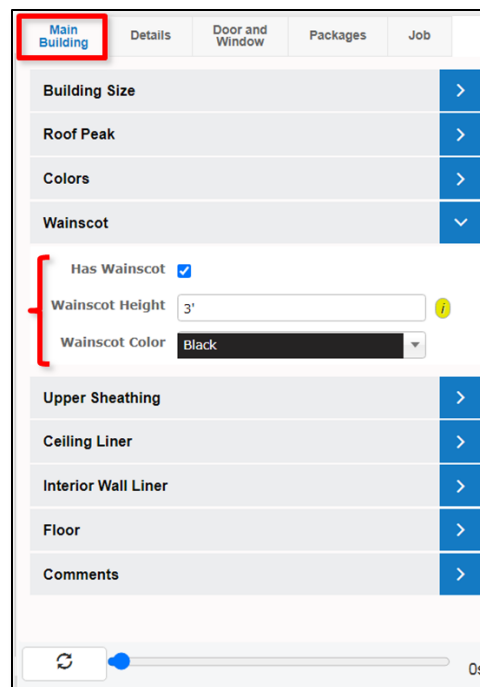


Figure 21: Making changes to Wainscoting using the *Properties Pane*.

Changing Job Status to Quoted

Once you have made all the changes needed to a job's specifications, you are ready to lock it down for quoting purposes. To do this, simply click on the **Make Quote** button at the top of the page. This will lock the materials and pricing information for your job and change the job's status to *Quoted*. (Don't worry, you can always requote a job if changes need to be made after you've clicked on the **Make Quote** button.) Now, to generate the needed customer documents for your quote, you will simply click on the **Outputs** button in the *Page Header*. Clicking on this button will open the *Download Outputs* dialog box, from which you can select, download and print roof layouts, panel drawings, job data, sales proposals and quotes.

Additional Support

We hope that this document has provided you with the information you need to get started with SmartBuild successfully. If you have any difficulty setting up or using SmartBuild, please contact support@keymark.com.