

SmartBuild

e-Modeler Fundamentals

for System Administrators

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What Is e-Modeler?

e-Modeler is a SmartBuild add-on that allows your customers to use a simplified version of SmartBuild's web-based design tools to create their own custom building designs. What's more, the materials used to design each structure are those you have made available to your customers from your company's inventory.

e-Modeler is a great tool for customers that want to create their own custom building designs. It's also a great tool for salespeople to use in the field, to help customers envision and budget their projects. The purpose of this document is to provide SmartBuild System Administrators with fundamental information about the e-Modeler add-on; what it is, how it works and how to set it up.

How e-Modeler Works

Providing your customers with e-Modeler functionality is a four-step process:

- Step 1** – Share e-Modeler links with your customers
- Step 2** – Customers use e-Modeler to design custom structures
- Step 3** – Customers request a quote for completed designs
- Step 4** – Sales provides quotes and additional design data tailored to customer specifications

Each of process is explored chronologically, in further detail immediately below.

Share e-Modeler Links

Your customers will use model templates that you provide as a starting point for their e-Modeler designs. Each different template model that you provide will have its own unique hyperlink. You may wish to publish these links on your company's website, to allow your customers access to your entire menu of template options. Or, if you want to steer a customer directly to a specific design template, you can send them an email with a link to that specific model. More information about e-Modeler links and where to find them is provided later in this document.

Customer Creates & Submits Custom Design

e-Modeler has been created for the novice designer with a simple, powerful toolkit and intuitive interface. When a customer clicks on an e-Modeler link that you have provided, the first thing they will see is a splash screen with basic help information, as shown in **Figure 1** below. After reviewing

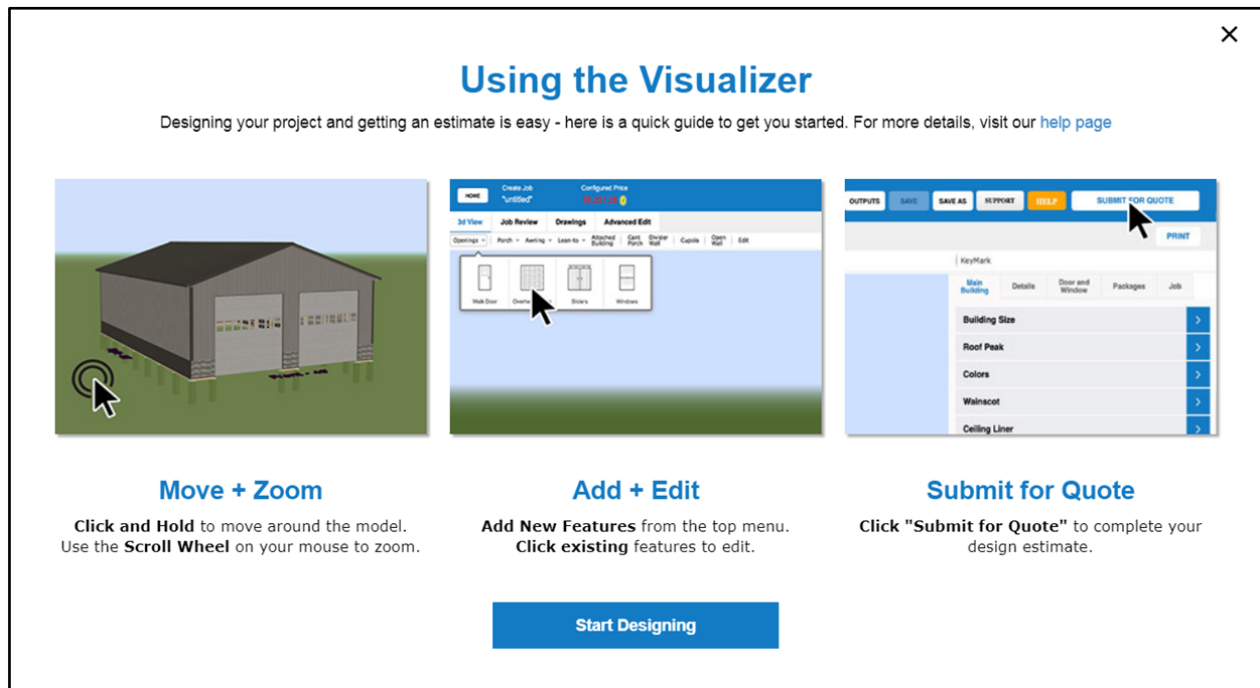


Figure 1: When a customer clicks on an e-Modeler link, they are presented with a splash screen showing basic instructions.

instructions on the splash screen, the customer will click on the *Start Designing* button, and be taken directly to the e-Modeler interface (**Figure 2** below). As you will see when you play around with the interface, e-Modeler functions in much the same way as a *Lite* version of SmartBuild, with a simplified interface.

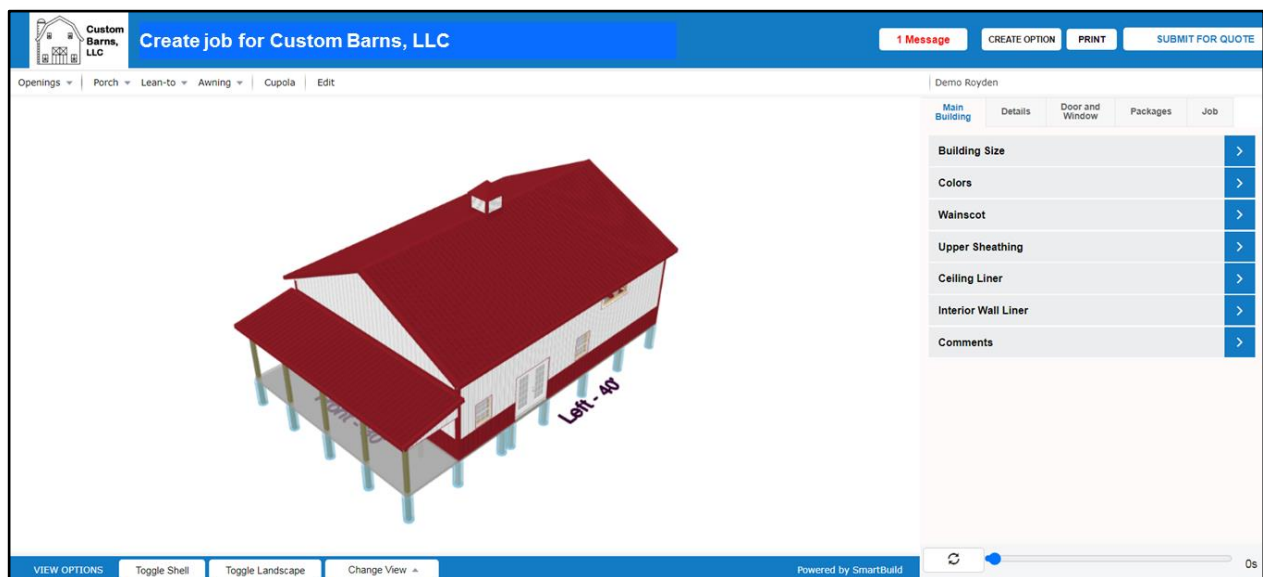


Figure 2: SmartBuild e-Modeler provides your customers with a FREE, SIMPLIFIED and INTUITIVE design interface that allows them to create custom building designs of their own and then submit them to your company for a quote.

Customer Requests Quote

Users can get as creative as they want, exploring design alternatives to their hearts' content. Once a customer has created a design they like, they can request a quote directly from your company by simply clicking on the `Submit For Quote` button (**Figure 3.**) This will open the *Submit for Quote* window shown below in **Figure 3.**

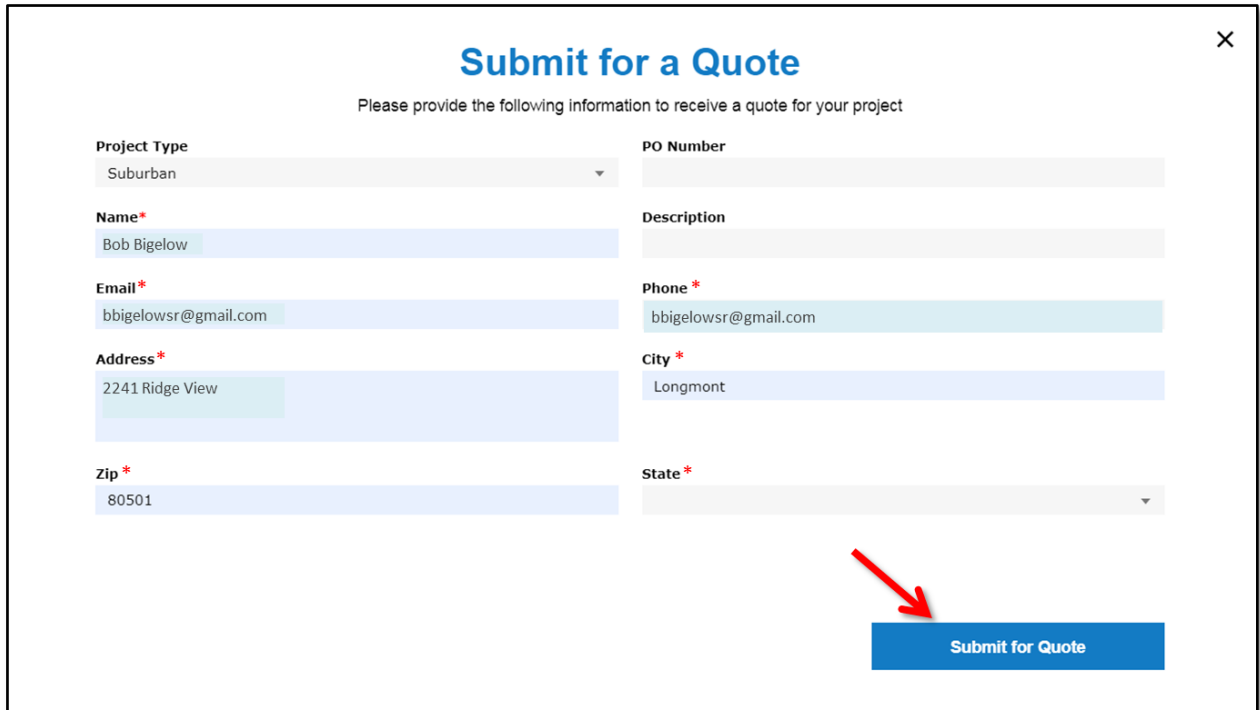


Figure 3: The *Submit for Quote* page is used to gather needed customer information

When a customer completes the form and clicks on the `Submit for Quote` button, (**Figure 3**) the confirmation message shown in **Figure 4** (right) will pop up, informing the customer that their quote request has been submitted successfully. Once a job has been submitted, it is no longer accessible to the customer via the e-Modeler interface.

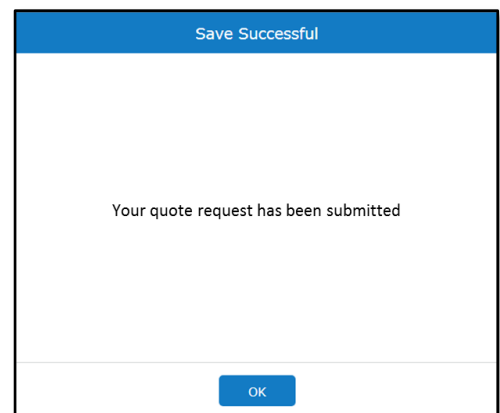


Figure 4: Customer confirmation message.

Provides Quote & Design Data

Once a customer has submitted a custom design for a quote, it will appear as a new job, on your SmartBuild *Jobs List*. under the SmartBuild *Anonymous user* account established for e-Modeler jobs. (See **Figure 5** below.) As you can see, the name assigned to the *Anonymous* user account begins with the prefix "Anon." This prefix is used for all Anonymous accounts, making it easy to locate all your Anonymous job submissions using the *Jobs List's* sort and filter operations.

Actions	Name	User	Distributor	Status	Created	Modified	Quoted	Quoted
Take Job Delete		(anon1060)	Custom Barns - Anonymous	New	7/7/2022 10:39:01 AM	7/7/2022 10:39:01 AM	0	0
Take Job Delete	info	(anon1060)	Custom Barns - Anonymous	New	8/23/2022 12:00:20 PM	8/23/2022 12:00:20 PM	0	0
Take Job Delete		(anon1060)	Custom Barns - Anonymous	New	9/2/2022 8:18:31 AM	9/2/2022 8:18:31 AM	0	0
Take Job Delete		(anon1060)	Custom Barns - Anonymous	New	9/7/2022 6:22:45 AM	9/7/2022 6:22:45 AM	0	0
Take Job Delete		(anon1060)	Custom Barns - Anonymous	New	10/20/2022 9:55:58 AM	10/20/2022 9:55:58 AM	0	0
Take Job Delete		(anon1060)	Custom Barns - Anonymous	New	10/20/2022 11:31:37 ...	10/20/2022 11:31:37 ...	0	0
Take Job Delete		(anon1060)	Custom Barns - Anonymous	New	11/3/2022 12:36:02 PM	11/3/2022 12:36:02 PM	0	0
Take Job Delete		(anon1060)	Custom Barns - Anonymous	New	11/7/2022 11:39:49 AM	11/7/2022 11:39:49 AM	0	0
Take Job Delete	website design	(anon1060)	Custom Barns - Anonymous	New	11/18/2022 7:52:52 AM	11/18/2022 7:52:52 AM	0	0
Take Job Delete	SEND TO JOB	(anon1060)	Custom Barns - Anonymous	New	11/22/2022 10:48:51 ...	11/22/2022 10:48:51 ...	0	0

Figure 5: Search your *Jobs List* for the User "Anon" to locate customer design jobs submitted for quotation.

Once you locate the target Anonymous job on your list, click on the **Take Job** button (**Figure 6**) to the left of that job. This will open the *Take Job* window pictured in **Figure 7** on the following page.

Actions	Name	User	Distributor	Status	Created	Modified	Quoted	Quoted
Take Job Delete	test	(anon1060)	Custom Barns - Anonymous	New	7/7/2022 10:39:01 AM	7/7/2022 10:39:01 AM	0	0
Take Job Delete		(anon1060)	Custom Barns - Anonymous	New	8/23/2022 12:00:20 PM	8/23/2022 12:00:20 PM	0	0
Take Job Delete		(anon1060)	Custom Barns - Anonymous	New	9/2/2022 8:18:31 AM	9/2/2022 8:18:31 AM	0	0
Take Job Delete		(anon1060)	Custom Barns - Anonymous	New	9/7/2022 6:22:45 AM	9/7/2022 6:22:45 AM	0	0
Take Job Delete	morton test	(anon1060)	Custom Barns - Anonymous	New	10/20/2022 9:55:58 AM	10/20/2022 9:55:58 AM	0	0
Take Job Delete	website entry	(anon1060)	Custom Barns - Anonymous	New	10/20/2022 11:31:37 ...	10/20/2022 11:31:37 ...	0	0
Take Job Delete	website tool	(anon1060)	Custom Barns - Anonymous	New	11/3/2022 12:36:02 PM	11/3/2022 12:36:02 PM	0	0
Take Job Delete	website entry	(anon1060)	Custom Barns - Anonymous	New	11/7/2022 11:39:49 AM	11/7/2022 11:39:49 AM	0	0
Take Job Delete	website design	(anon1060)	Custom Barns - Anonymous	New	11/18/2022 7:52:52 AM	11/18/2022 7:52:52 AM	0	0
Take Job Delete	SEND TO JOB	(anon1060)	Custom Barns - Anonymous	New	11/22/2022 10:48:51 ...	11/22/2022 10:48:51 ...	0	0

Figure 6: After you have located the target job, click on the **Take Job** button to assume ownership of that job.

Simply click on the **Take Job** button at the bottom of the page to claim responsibility for this job.

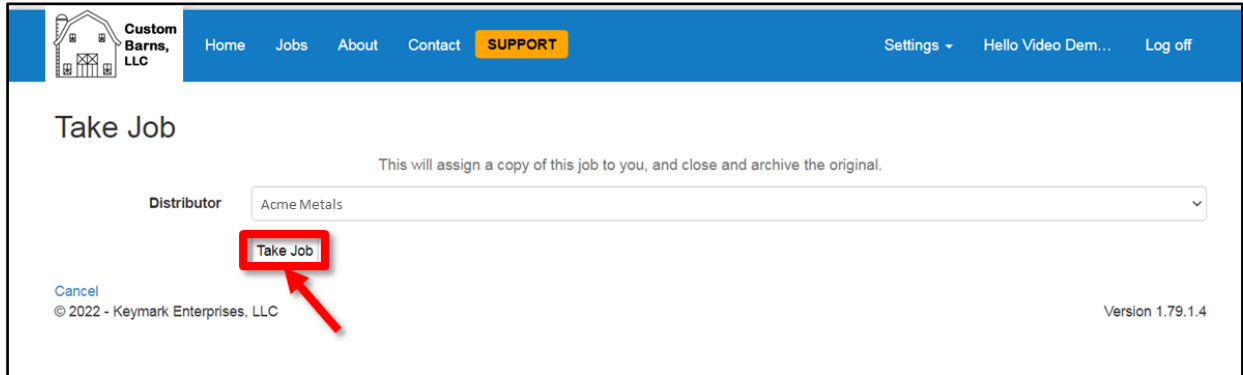


Figure 7: Click on the **Take Job** button to assume ownership of a job that has been submitted *anonymously*.

Once you have assumed ownership of an *Anonymous* job, quote documents, drawings, material lists and all the other standard outputs are immediately available to download and share with your customer. In addition, the *Details* for that job will include a hyperlink to a design page that can be shared with the customer. To open the *Details* page for a job, click on the **Name** field for that job in your *Jobs List*.

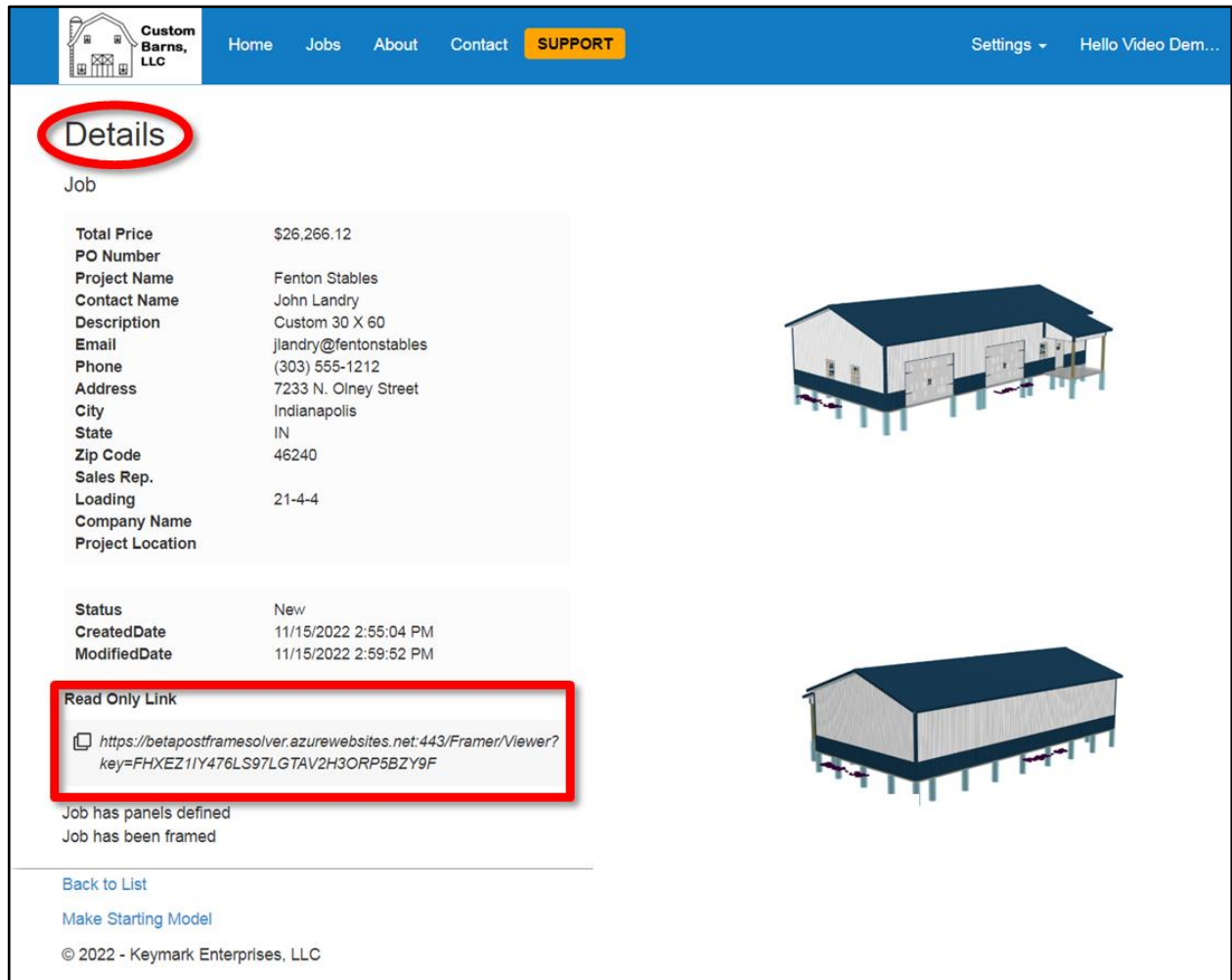


Figure 8: Share this link on the *Details* page with your e-Modeler customer to provide them with access to view their design AFTER it has been submitted for a quote..

Your customer will be able to use this link from any computer, Smartphone or tablet to review their design as submitted. (See **Figure 9** below.)



Figure 9: The link provided on the *Details* page provides customers with the ability to view their designs from virtually any perspective.

Now that we have shown you the basics of how e-Modeler works, we will explore the requirements for getting up and running with this add-on.

e-Modeler Installation & Setup

Installation and configuration of e-Modeler services requires the completion of four (4) basic tasks:

1. *Request e-Modeler Services*
2. *Our Setup*
3. *Your Setup*
4. *Publish e-Modeler Templates*

Each of these steps is described below in greater detail, in the order presented above.

Request e-Modeler Services

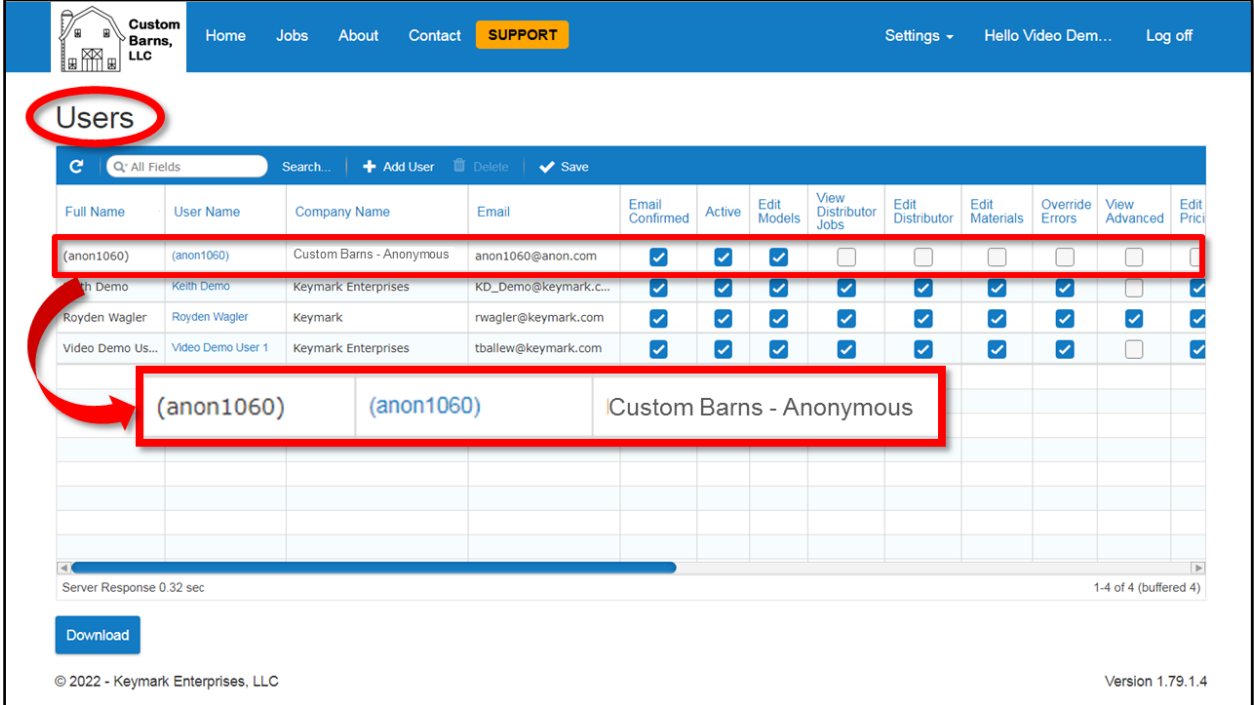
The first step is to request installation of the e-Modeler add-on by sending an email to sales@keymark.com. Once your request has been received, processed and approved, our Support Team will be instructed to move on to step 2 (below).

Our Setup

The *SmartBuild Support Team* will configure the server-side functionality required for your e-Modeler add-on. There are two aspects of this process you should be aware of, as they will impact the setup on your side.

ANONYMOUS USER ACCOUNT

The *SmartBuild Support Team* will create an *Anonymous User* account that will be used to provide your customers access to e-Modeler. Once we have created this account for you, you will find it listed on your SmartBuild *Users* page, as pictured in **Figure 10** below.



The screenshot shows the 'Users' management interface for Custom Barns, LLC. The page title 'Users' is circled in red. A table lists several users, with the first row highlighted in red. This row represents the anonymous user account. Below the table, a red box highlights the details for this user: Full Name '(anon1060)', User Name '(anon1060)', and Company Name 'Custom Barns - Anonymous'. A red arrow points from the highlighted row in the table to this detail box. The table columns include Full Name, User Name, Company Name, Email, Email Confirmed, Active, Edit Models, View Distributor Jobs, Edit Distributor, Edit Materials, Override Errors, View Advanced, and Edit Price. The footer shows '© 2022 - Keymark Enterprises, LLC' and 'Version 1.79.1.4'.

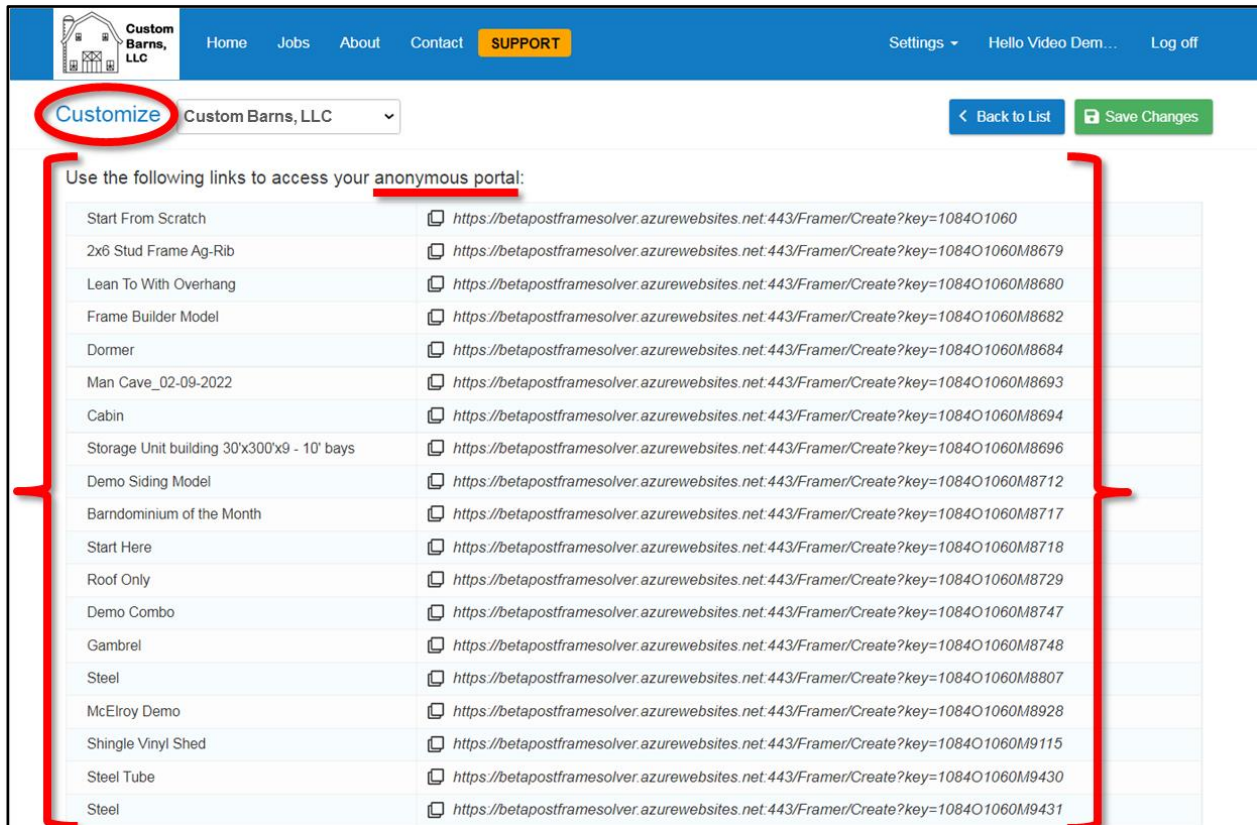
Full Name	User Name	Company Name	Email	Email Confirmed	Active	Edit Models	View Distributor Jobs	Edit Distributor	Edit Materials	Override Errors	View Advanced	Edit Price
(anon1060)	(anon1060)	Custom Barns - Anonymous	anon1060@anon.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Keith Demo	Keith Demo	Keymark Enterprises	KD_Demo@keymark.c...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Royden Wagler	Royden Wagler	Keymark	rwagler@keymark.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Video Demo Us...	Video Demo User 1	Keymark Enterprises	tballew@keymark.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Figure 10: The Anonymous user account used to access e-Modeler links.

The Full Name of your *Anonymous* user account will consist of the prefix “anon” followed by a series of four digits (anon1060 in the example shown above). Also notice that the Company Name associated with this account is the *Builder’s* name (Custom Barns) followed by a hyphen and the word *Anonymous*.

ANONYMOUS PORTAL LINKS

As part of the e-Modeler installation process, SmartBuild will create a copy of all the building-model templates already developed for your company's internal use. It will also create one unique hyperlink to each unique template, allowing you to share links those templates with your customers. These hyperlinks can be found on, and copied from, your Customize page, as shown in **Figure 11**. More on this later.



The screenshot shows the SmartBuild web interface for Custom Barns, LLC. The 'Customize' tab is selected and circled in red. Below the navigation bar, there is a dropdown menu for 'Custom Barns, LLC' and buttons for 'Back to List' and 'Save Changes'. A red bracket highlights a table of model templates and their anonymous portal hyperlinks.

Use the following links to access your anonymous portal:	
Start From Scratch	https://betapostframesolver.azurewebsites.net:443/Framer/Create?key=1084O1060
2x6 Stud Frame Ag-Rib	https://betapostframesolver.azurewebsites.net:443/Framer/Create?key=1084O1060M8679
Lean To With Overhang	https://betapostframesolver.azurewebsites.net:443/Framer/Create?key=1084O1060M8680
Frame Builder Model	https://betapostframesolver.azurewebsites.net:443/Framer/Create?key=1084O1060M8682
Dormer	https://betapostframesolver.azurewebsites.net:443/Framer/Create?key=1084O1060M8684
Man Cave_02-09-2022	https://betapostframesolver.azurewebsites.net:443/Framer/Create?key=1084O1060M8693
Cabin	https://betapostframesolver.azurewebsites.net:443/Framer/Create?key=1084O1060M8694
Storage Unit building 30'x300'x9 - 10' bays	https://betapostframesolver.azurewebsites.net:443/Framer/Create?key=1084O1060M8696
Demo Siding Model	https://betapostframesolver.azurewebsites.net:443/Framer/Create?key=1084O1060M8712
Barndominium of the Month	https://betapostframesolver.azurewebsites.net:443/Framer/Create?key=1084O1060M8717
Start Here	https://betapostframesolver.azurewebsites.net:443/Framer/Create?key=1084O1060M8718
Roof Only	https://betapostframesolver.azurewebsites.net:443/Framer/Create?key=1084O1060M8729
Demo Combo	https://betapostframesolver.azurewebsites.net:443/Framer/Create?key=1084O1060M8747
Gambrel	https://betapostframesolver.azurewebsites.net:443/Framer/Create?key=1084O1060M8748
Steel	https://betapostframesolver.azurewebsites.net:443/Framer/Create?key=1084O1060M8807
McElroy Demo	https://betapostframesolver.azurewebsites.net:443/Framer/Create?key=1084O1060M8928
Shingle Vinyl Shed	https://betapostframesolver.azurewebsites.net:443/Framer/Create?key=1084O1060M9115
Steel Tube	https://betapostframesolver.azurewebsites.net:443/Framer/Create?key=1084O1060M9430
Steel	https://betapostframesolver.azurewebsites.net:443/Framer/Create?key=1084O1060M9431

Figure 11: Hyperlinks to all your e-Modeler model templates will be added to your SmartBuild Customize page once our Support Team completed your e-Modeler installation.

NOTE – Every time you add a new design template to SmartBuild, an e-Modeler hyperlink to that template will automatically be added to your *Customize* page.

Your Setup

There are three tasks you will need to complete on your end before you can make e-Modeler available to your customers:

1. Configure some settings on your SmartBuild *Customize* page
2. Define Job *Framing Rules* for your Anonymous account
3. Publish your e-Modeler templates

CUSTOMIZE PAGE

As pictured in **Figure 12** on the following page, there are five sections on the *Settings* → *Customize* page that are associated with your e-Modeler installation. As described below, not all of these sections are likely to require your attention, but you should be aware of their e-Modeler functionality nonetheless.

1. **Upload a .png file to use for the logo on the site** – Your company’s logo should have already loaded into this field when SmartBuild was first installed. If not, however, you will want to be sure to upload a logo now, as it will be displayed on all e-Modeler pages viewed by your customers. Simply click on the *Choose File* button. This will open a file navigation window on your computer which you will use to select the desired file.
2. **Submit Anonymous Acknowledgment** – Use this field to type in the message that you users will receive (via message box) when they click on the *Request Quote* button. We suggest something like the following:

“[Your Company Name] has received your request for a quote on the building design you submitted to our web site. Your request is now in process.”
3. **Use the following links to access your anonymous portal** – As mentioned previously, this section of the *Customize* page lists all of the web addresses (URLs) associated with the template design models made available to your e-Modeler customers. Each different template has its own unique URL. This section will not appear on your *Customize* page unless e-Modeler has been installed for your company. You don’t need to make any changes here. We are simply pointing out the location where these hyperlinks are stored and made accessible to you.
4. **Notification User** – Use this dropdown to select the users or user group that will receive email notification when a model has been submitted by a customer. Only one user or group name can be selected.
5. **Change Notifications** – Use the *Anonymous Jobs* column on the far right of this section to select changes to the status of all *Anonymous Jobs* for which you wish the *Notification User* to receive automatic email notification. The options include:
 - *New* – A job that has been entered and saved for the first time. At a minimum, this checkbox should be activated at all times.
 - *Quoted* – A job for which you a formal quote has been generated.
 - *Ordered* – A job for which the contract has been signed and materials ordered.
 - *Closed* – A job for which all actions have been completed.
 - *Requoted* – A job which for which the original quote has been modified.
 - *Amended* – A job which for which order that has been modified.

BETA YOUR LOGO HERE Home Jobs About Contact SUPPORT Settings - Hello Video Dem... Log off

Customize Demo Royden < Back to List Save Changes

Upload a .png or .jpg or .jpeg file to use for the logo on the site

Upload File **1**

To override the default Home, About, and Contact links, enter the addresses you want to use below.
 Make sure you include the correct prefix, eg: <http://www.website.com/About>

Home Link

About Link

Contact Link

Order Disclaimer:

Submit Anonymous Acknowledgment: **2**

Uncheck this box if you don't want our Support link shown when editing a job
 Include Support

Check this box if you want your distributor name included as a watermark on printouts from the Edit page
 Add Watermark

Give your users the following link to login:

Give them the following link to register:

Use the following links to access your anonymous portal:

Start From Scratch	<input type="text" value="https://betapostframesolver.azurewebsites.net.443/Framer/Create?key=108401060"/>
2x6 Stud Frame Ag-Rib 3	<input type="text" value="https://betapostframesolver.azurewebsites.net.443/Framer/Create?key=108401060M8679"/>
Lean To With Overhang	<input type="text" value="https://betapostframesolver.azurewebsites.net.443/Framer/Create?key=108401060M8680"/>
Frame Builder Model	<input type="text" value="https://betapostframesolver.azurewebsites.net.443/Framer/Create?key=108401060M8682"/>
Dormer	<input type="text" value="https://betapostframesolver.azurewebsites.net.443/Framer/Create?key=108401060M8684"/>

Notification User **4**

Keith Demo

Change Notifications:

New Job Status	Supplier Jobs	Builder Jobs	Anonymous Jobs
New	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quoted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ordered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Closed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Requoted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amended	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Taken	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OrderPrep	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AcceptedOrder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Pricing API details

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Figure 12: The *Customize* page contains five areas for configuring your e-Modeler installation.

FRAMING RULES

The second step in setting up your e-Modeler add-on is to define the information that will be required from your customers in order to submit a model and request a quote. To accomplish this, go to [Settings](#) → [Framing Rules](#). As you can see in **Figure 4** below, a new set of *Framing Rules* has been created. These *Framing Rules* are entirely separate from those used to configure your primary SmartBuild account. Click on the [Edit](#) button for the *Framing Rules* associated with your *Anonymous* user account.

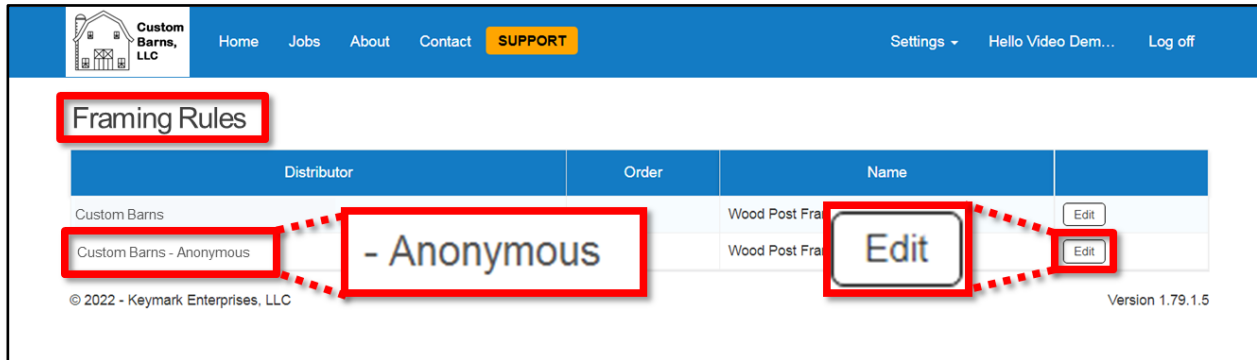


Figure 13: Click on the [Edit](#) button for the *Framing Rules* associated with your *Anonymous* user account.

When the *Modify Framing Rules* page for your *Anonymous* account opens (**Figure 6** below), click on the [Job](#) tab. Here you will see the default list of information the customer will be asked to provide when

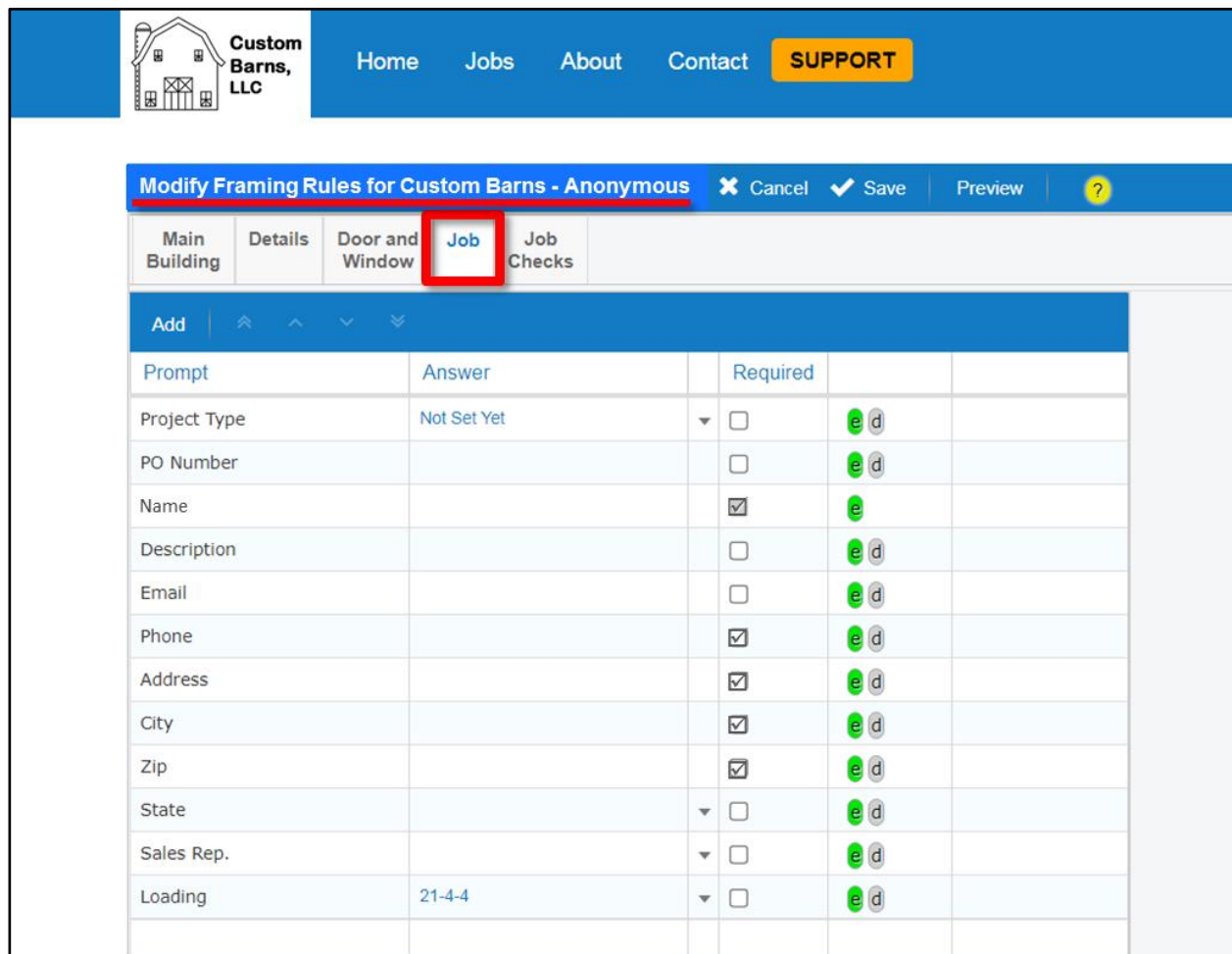


Figure 14: Define the information requested of your customers on the [Job](#) section of *Framing Rules*

they submit a job for quotation. This list is fully customizable, and you can add, delete and edit this list to meet the specific needs of your organization. The following is a brief description of list of the properties associated with each line item:

- *Prompt* – Each line item in the `Prompt` column represents the exact text to presented to your customers, so be sure to use correct spelling and punctuation. The descriptions provided below are, once again, the default settings. You can edit and delete, or add to, this list as you see fit.
- *Answer* – The default value (answer) associated with a given `Prompt`. You are now required to provide a default value.
- *Required* – When checked (activated), the customer will be required to provide information for the associated `Prompt`. Failure to supply the required information will result in an error message when the user attempts to save his/her mode and request a quote.
- *Change* – Click on “e” to edit the line item; click on “d” to delete it.
- *Add* – Click on this button to add a new line item to the list of user information you wish to collect.

Once you are done, be sure to click on the `Save` button, near the top of the page, in order to save your work!

Share e-Modeler Links

The last step in setting up e-Modeler is to share hyperlinks to your e-Modeler templates with your customers. As stated earlier, there are two basic ways to go about this. You can publish the links on your company’s website, to allow your customers access to your entire menu of template options. Or, if you want to steer a customer directly to a specific design template, you can send them an email with a link to that specific model. Either way, the links are always available for copying on your `Customize` page.

Further Information

That’s it for our overview of e-Modeler fundamentals. For further information, please contact us at the following email addresses:

Sales@Keymark.com

Support@Keymark.com