Roofing Passport
System Administrator's Guide

Setting Up
Pricing Tables

Purpose

The purpose of this document is to provide System Administrators with the knowledge needed to set up *Pricing Tables* for their organization's materials, labor and freight. SmartBuild will use these *Pricing Tables* to calculate accurate cost and price information for bids, quotes, material orders and other outputs.
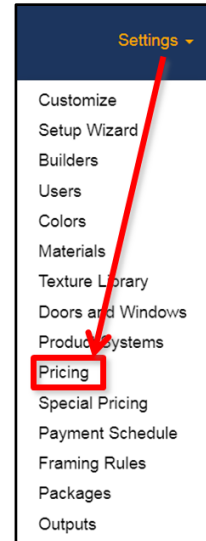
Parts of the Pricing Window

To access your *Pricing Tables*, click on the `Settings` menu at the top of any page and select `Pricing` from the drop-down list, as pictured in **Figure 1** at right. This will open your *Pricing* page, similar to the one shown in **Figure 2** below. Note that there are three primary areas on this page that you will use to guide your work: the *Material & Service* tabs, the *Command Buttons* and the *Pricing Table Column Headers*. These are described as follows:

Material & Service Tabs – As you can see in the area highlighted in red in **Figure 2** (below) there are seven tabs on the *Pricing* page; five for materials (*Sheathing*, *Trim*, *Hardware*, *Connectors* and *Fasteners*) and two for services (*Labor* and *Freight*). When the time comes, you will click on each tab to open the *Pricing Table* for the associated items.

Command Buttons – There are three command buttons on the *Pricing* page (highlighted in yellow in **Figure 2**): `Margin`, `Upload` and `Download`. We will discuss each of these functions a little later in this document.

Figure 1: Select Pricing from the Settings menu.

Column Headers – Each of the tables on your *Pricing* page contain the same 11 columns. As we will discuss later in this document, most of these columns will already contain data that has been entered by your Distributor/Supplier.

Figure 2: The three principal sections of the *Pricing* page.

To make your *Pricing Tables* easier to work with, you can change the view of any of the columns and their contents:

Resizing Columns – You can resize any of the columns in the table by bringing your mouse to hover over the target column header until your cursor changes to the resize symbol shown at right. Then simply click and drag your mouse to resize the column as desired.

Sorting Contents – You can sort the contents of a table from A to Z by clicking once on the desired column header. Click a second time to change the sort order from Z to A.

Columns and Their Contents

As mentioned previously, each of the seven different *Pricing Tables* contain the same 12 columns of information. The following is a description of each of these columns and their contents, broken down into three categories: *Vendor Data Columns*, *Your Data Columns* and *Advanced Data Columns*.

NOTE – The descriptions of *Vendor Data Columns* immediately below are to provide background information only. These columns DO NOT require any action on your part. There are only two columns of data that you are responsible for in each table; *Margin* and *Price*. Therefore, if you prefer, you can click here to skip down to the information about these two columns.

Figure 3: *Margin* and *Price* are the only two columns that you need to complete in order to set up your *Pricing Tables*.

VENDOR DATA COLUMNS

For most *Pricing Tables*, your Distributor/Supplier will be responsible for populating the 10 columns shown in yellow in (**Figure 3** above) with data. The contents of each columns is described as follows:

SKU – In order to generate highly detailed and accurate *Material Lists*, SmartBuild uses its own special SKU code for each distinct material. Listed on the *Pricing Tables* as "*SKU.*" This required column of data includes specific segments of code that allow SmartBuild to differentiate among otherwise identical materials that are offered in a variety and `Colors` and/or precut `Lengths`.

Vendor SKU – The *Vendor SKU* column is used to list the SKU code your Supplier/Distributor uses to identify each unique piece of material in its inventory. The *Vendor SKU* column is optional, however, most *Suppliers* find it extremely helpful to map their SmartBuild *Materials List Outputs* right back to the parts in their warehouse.

Material – This is the Supplier's/Distributor's brief, structured description of each material or service being offered. This field is required for all materials and services.

Part Length – This optional column of data is generally used to record the span of each material that is provided in pre-cut lengths. If a material is "cut to order", this field may be left blank.

Color Code – The *Color Code* is a short, unique identifier assigned by your Supplier/Distributor for every color in which a material is made available.

Pricing Unit – This is the designated quantity upon which the pricing for a material or service is based. For example, the *Pricing Unit* might be designated as "each" for materials that are sold individually, as "part length" for materials that are sold in specific pre-cut sizes, "per box" for things like rivets and connectors, "per hour" for labor, and so on.

Part Cost – This required column is used to record the price that your organization will pay your Supplier/Distributor for a single *Pricing Unit* of a given material.

Taxable – This required column indicates whether or not a given material is subject to federal, state or local taxes. (1 = taxable; 0 = nontaxable.)

Weight – This optional column represents the specific weight associated with a material's given *Pricing Unit*. If values are provided, these figures will be used to calculate the total shipping weight for each job.
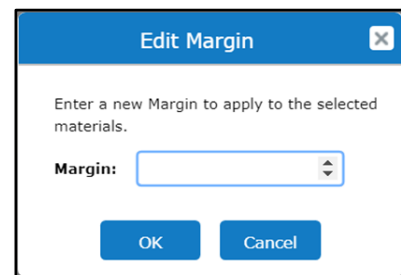
YOUR DATA COLUMNS

As mentioned above, there are only two columns of data that you are responsible for populating in each of the seven *Pricing Tables*; *Margin* and *Price*. In fact, it is even easier than that. When you enter information in either column, SmartBuild will automatically enter the required data in the other column for you. Read on for details.

Margin/Markup – Some Suppliers/Distributors name this column *Margin*, while others name it *Markup*. Either way, this column represents the additional percentage your company will charge the customer, over and above the *Cost* it pays to purchase each item from your Supplier/Distributor.

Figure 4: The *Edit Margin* dialog box.

If you want to enter or change the *Margin/Markup* for multiple line items in a given table, simply select the desired items with your mouse and then click in the `Margin` command button on the toolbar. (See **Figure 5** on the following page.) This will open the *Edit Margin* dialog box pictured in **Figure 4** (above right). Type in your margin, as a percentage, using a single decimal point (e.g. 25.0%, 35.8%, etc.) When you are done, click on the `OK` button to close the dialog box. The percentage you entered will be applied to all the line items you have selected.

If you have not yet entered a value in the *Price* column, once you enter a value in the *Margin* column SmartBuild will automatically calculate the *Price* (*Cost* X *Margin*), and enter that value in the *Price* column for you.

Price – The *Price* column represents the fee you will charge the customer for each line item in your *Pricing Tables*. *Price* values must be entered one line item at a time. To enter or edit a *Price*, double click on the the *Price* field for the desired line item, and enter your value as dollars and cents. SmartBuild will automatically add the dollar-sign prefix for you.

If you have not yet entered a value in the *Margin* column, once you enter a value in the *Price* column SmartBuild will automatically calculate the *Margin* (Cost / *Price* – 1.00) and enter that value in the *Margin* column for you.
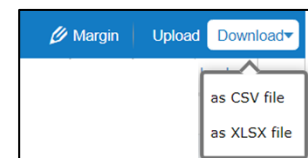
ADVANCED DATA COLUMNS

There are two columns that may or may not appear on your *Pricing Tables*; *Hide* and *Lock*. Both of these columns represent advanced functionality in SmartBuild, and they lie beyond the scope of this introductory document. Neither column of data is required for you to get up and running successfully with SmartBuild, so you can disregard them both as you are getting started.

Using the Download/Upload Functions

If you prefer to populate or edit the *Margin* and *Price* columns, or any other columns in your *Pricing Tables* using a CSV or Microsoft Excel (XLSX) file, you can download the existing data, make your changes, and then upload your completed file into the SmartBuild database.

DOWNLOAD PROCESS

To begin, click on the `Download` button on the toolbar, as pictured in **Figure 5** at right. Select the desired file type from the drop-down list that appears. As soon as you select your file type, SmartBuild will automatically download the file to your local computer. Simply open the file, make the needed changes, and then save the file to a location you can easily find it for the `Upload` process.
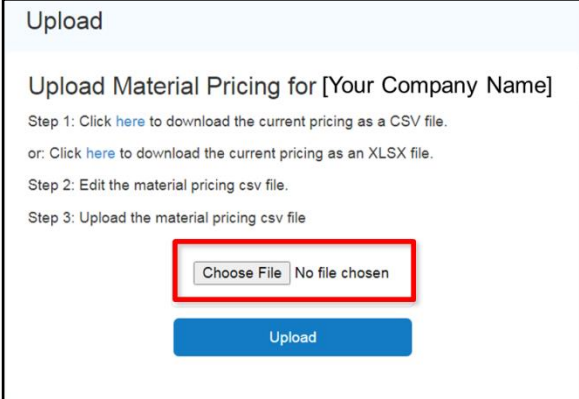

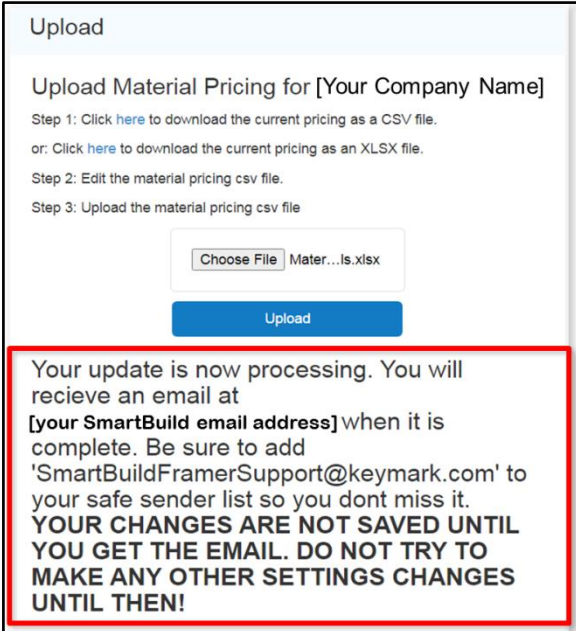**Figure 5:** Select the type of file for your `Download`.

NOTE – All seven tabs of material and service data on your *Pricing* page will be included In a downloaded CSV or XLSX file. Likewise, uploading your completed CSV or XLSX file will populate the data on all seven tabs of information on the *Pricing* page.

UPLOAD PROCESS

Once you have made all the changes needed to your downloaded *Pricing* file, you will need to `Upload` the file to the SmartBuild database in order to implement your changes. To begin, click on the `Upload` button on the toolbar on the *Pricing* page, as shown in **Figure 5** on the previous page. When you click on the `Upload` button, the dialog box shown in **Figure 6** will open.

Figure 6: The *Upload* dialog box for your *Pricing* file.

In the *Upload* dialog box, click on the `Choose File` button, and navigate to the location on your local computer where you have saved your CSV or XLSX file. Click on the file to select it. Now, back in the *Upload* dialog box, click on the `Upload` button. Once you do this, the bottom of the *Upload* dialog box will expand to present the message shown in **Figure 7** at left.

That is all there is to it. Be sure NOT to undertake any further changes to your SmartBuild *Settings* until you have received the confirmation email that announcing that your database has completed the upload process.