

SMART ESTIMATOR



GETTING STARTED USER GUIDE

Version: 2024.0



GLOBAL CONSTRUCTION
SOFTWARE AND SERVICES



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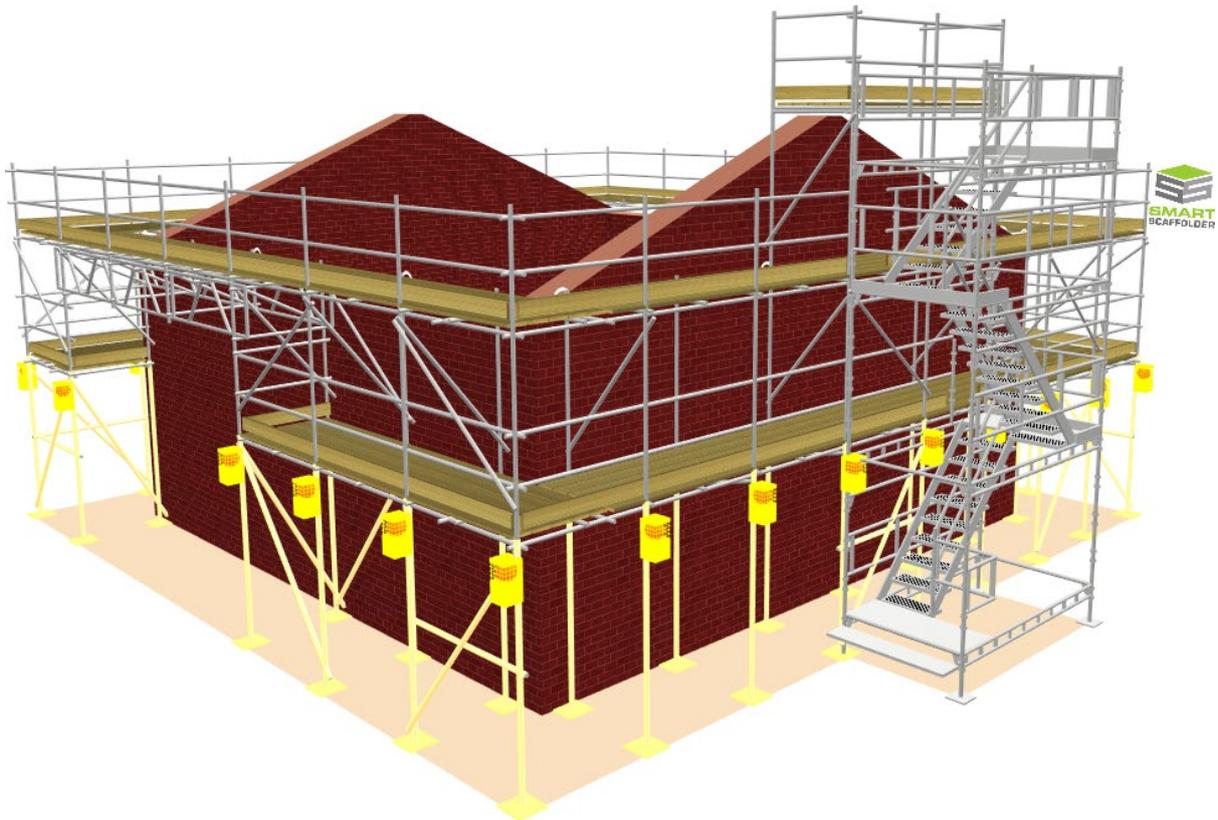
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Introduction

This guide is intended for you if:

- ▶ You have just purchased SMART Estimator for the first time.
- ▶ You have not installed SMART Estimator yet.

It provides some instructions to help you install and run SMART Estimator.



Important information

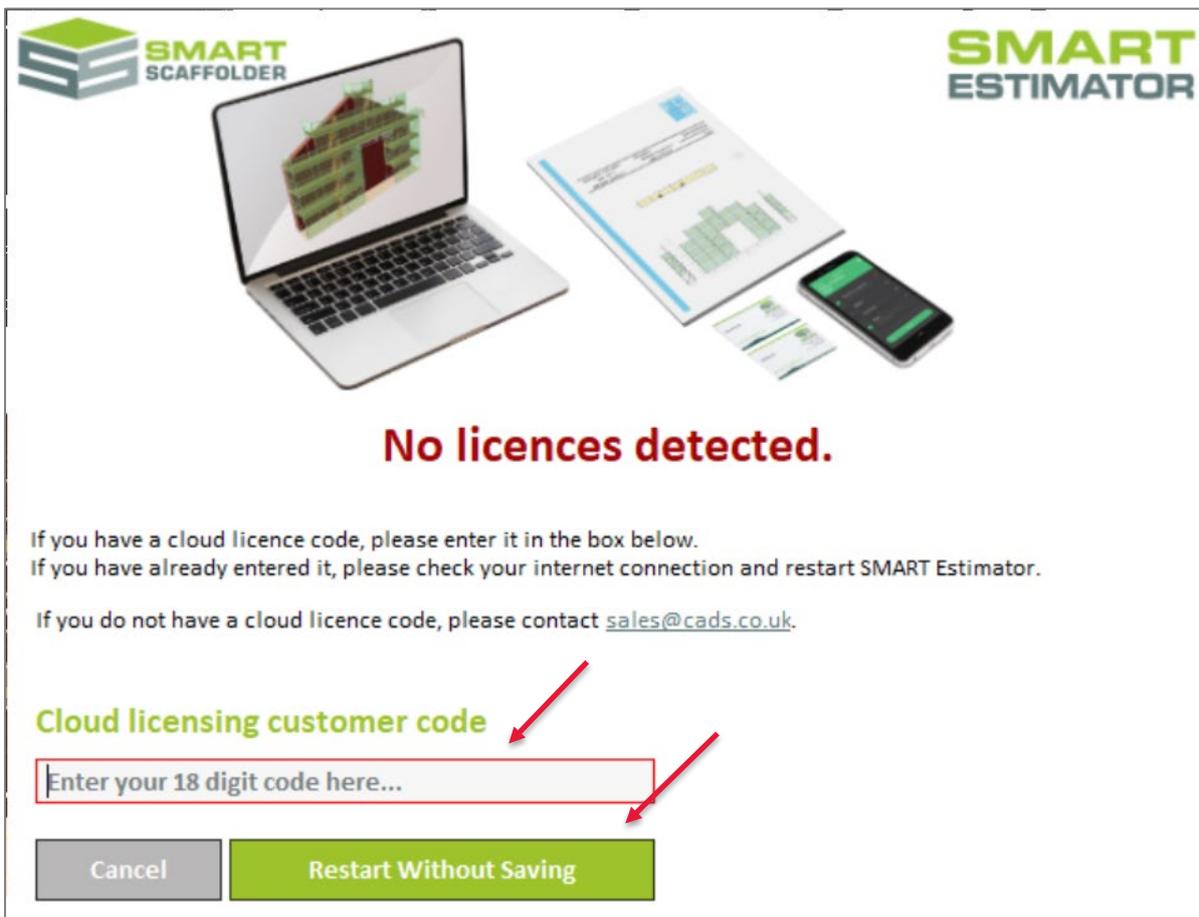


Please read this before you start.

A *Cloud Licence Code* would have been supplied with SMART Estimator and must be available to your computer before you can use the software.



Launch SMART Estimator with no licences. You will be prompted to enter your code. Enter your code, and then press **Save Customer Code and Restart** to relaunch SMART Estimator.



No licences detected.

If you have a cloud licence code, please enter it in the box below.
If you have already entered it, please check your internet connection and restart SMART Estimator.

If you do not have a cloud licence code, please contact sales@cad.s.co.uk.

Cloud licensing customer code

Enter your 18 digit code here...

Cancel Restart Without Saving

Download SMART Estimator

To install SMART Estimator, you will have been sent an email containing a link and password to download SMART Estimator. Open the link using your favourite web browser.

Once the page is open, you will be prompted to enter a password. Enter the password from your email:

SMART ESTIMATOR DOWNLOADS IS PASSWORD PROTECTED

This content is password protected. To view it please enter your password below:

Enter

Now press **Install SMART Estimator** to begin downloading the SMART Estimator installer:

DOWNLOAD SMART ESTIMATOR 2024

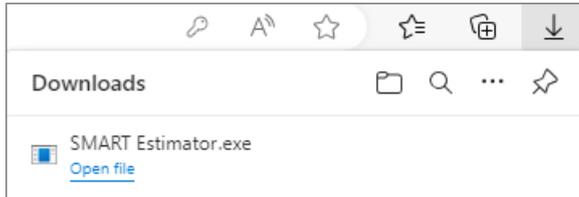
Customers with CADScover can download the latest version of SMART Estimator.

Install SMART Estimator 2024.0

Depending upon which Internet Web Browser you are using, downloading SMART Estimator will be slightly different but the basic steps are the same. Below are instructions for some different Internet Web Browsers.

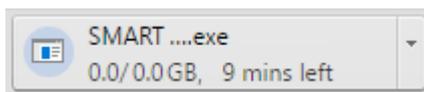
Microsoft Edge

Pick **Open file**.



Google Chrome

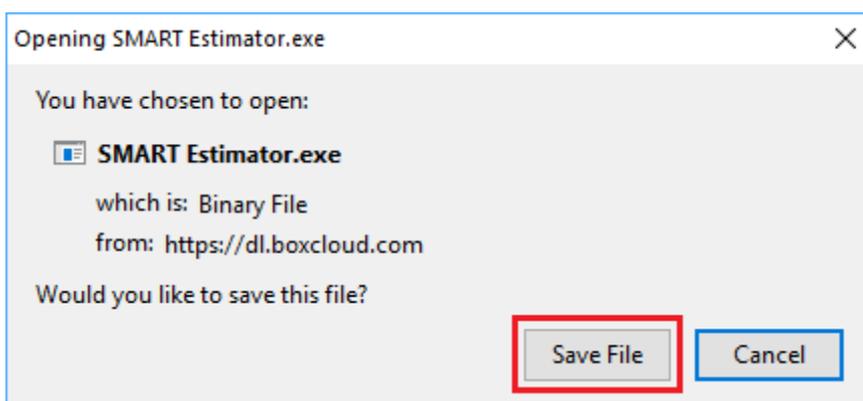
Google Chrome will automatically start downloading and its progress will be shown in the bottom left corner of the screen, by default the file will be downloaded into your downloads folder.



Once it has completed, click on it to launch the SMART Scaffolder installer.

Mozilla Firefox

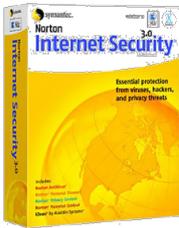
Pick the **Save File** option, press **OK** and choose a save folder.



Once it has completed, locate the downloaded file and double-click it to launch the SMART Scaffolder installer.

SMART Estimator Installation

Products that might prevent SMART Estimator installing



Please read this information if you use Internet security software such as:

- ▶ Norton Internet Security, Personal Firewall, or All-in-One Security
- ▶ McAfee Virus Scan Plus or Personal Firewall
- ▶ Panda Internet Security or Antivirus and Firewall

These security products may ask you whether to allow the SMART Estimator installation access to your computer:

For SMART Estimator to work correctly you must choose **Allow**.

Depending on the security software settings SMART Estimator may be automatically blocked, or it may be blocked if you do not choose the **Allow** option within a time limit. For this reason it is best not to leave your computer unattended while installing.

If SMART Estimator does not install or run correctly please call CADS Technical Support – it usually takes just a few minutes to get you up-and-running.

- ▶ Email support@smartscaffolder.com
- ▶ Telephone +44 (0)1202 603733 from Monday to Friday between 09:30 and 17:00

SMART Estimator requirements

The hardware and software requirements for this version of SMART Estimator are available online at http://www.smartscaffolder.com/System_Requirements.

Install SMART Estimator

This section explains how to install SMART Estimator and the **SMART Estimator Enterprise Server**.

- ▶ Choose **INSTALL SMART ESTIMATOR 2024**.



2024.0 (14/02/2024)

▶ **INSTALL SMART ESTIMATOR 2024**

- > Install Enterprise Only
- > Read the release notes

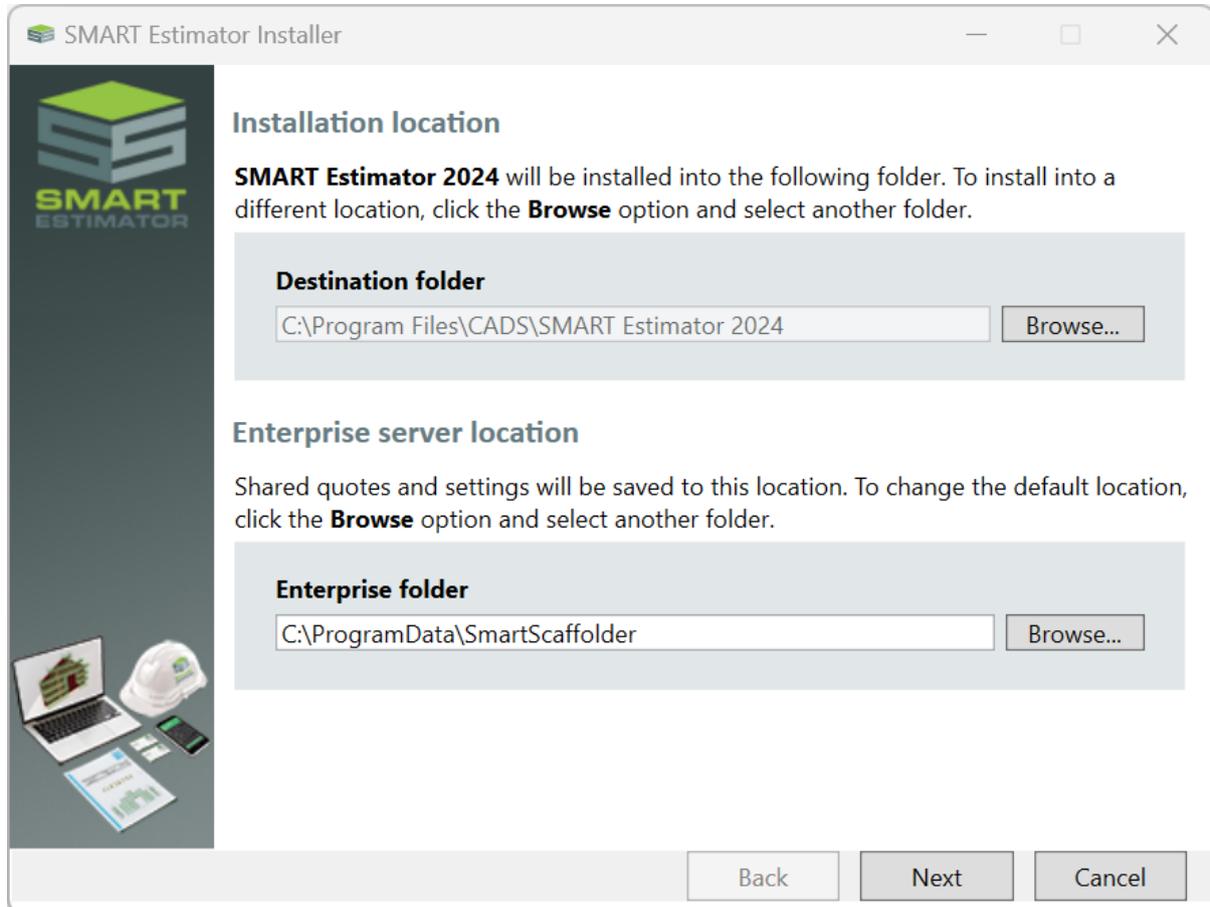
PRODUCT SUPPORT CENTRE
Open 09:30 - 17:00
Monday to Friday
Tel: +44 (0)1202 603733
support@smartscaffolder.com
www.smartscaffolder.com



- ▶ Next you will be asked where you want to install SMART Estimator. Usually there is no need to change these settings.
- ▶ If you have installed an Enterprise Server already, you can also set the location of it when installing SMART Estimator or you can do it later, after installation.
- ▶ Please follow the rest of the instructions provided by the installer to install SMART Estimator.

Where do I install my data?

The first screen of the installer will ask where you want to install SMART Estimator and the SMART Estimator Enterprise server.



The default **Installation Location** is usually correct.

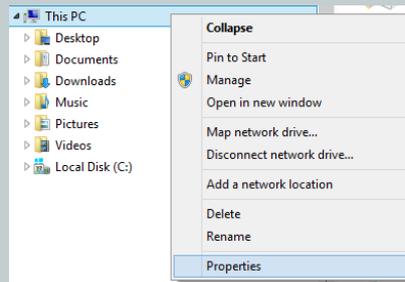
If you want all your data saved on this computer, use the default **Enterprise Server Location**.

If you want your data to be on a server, shared with other estimators, see **Appendix 1: Install on a Dedicated Server**, at the end of this guide.

How do I find the server's name?

You can find the server's computer name by looking at the server's properties. These are available by right clicking on either *My Computer*, *Computer* or *This PC*, depending on the version of Windows you are using.

These are available by right clicking on either *My Computer*, *Computer* or *This PC*, depending on the version of Windows you are using.



This will display the computer properties window, where you can find your computer's name:

System > About

DaveM-Win11
Precision 3551

Rename this PC

Where should I install SMART Estimator?

SMART Estimator is a 64-bit application. If you have a 64-bit edition of Windows, SMART Estimator cannot be installed in the **Program Files (x86)** directory. You can install it into any other directory, including **Program Files**.

Start SMART Estimator

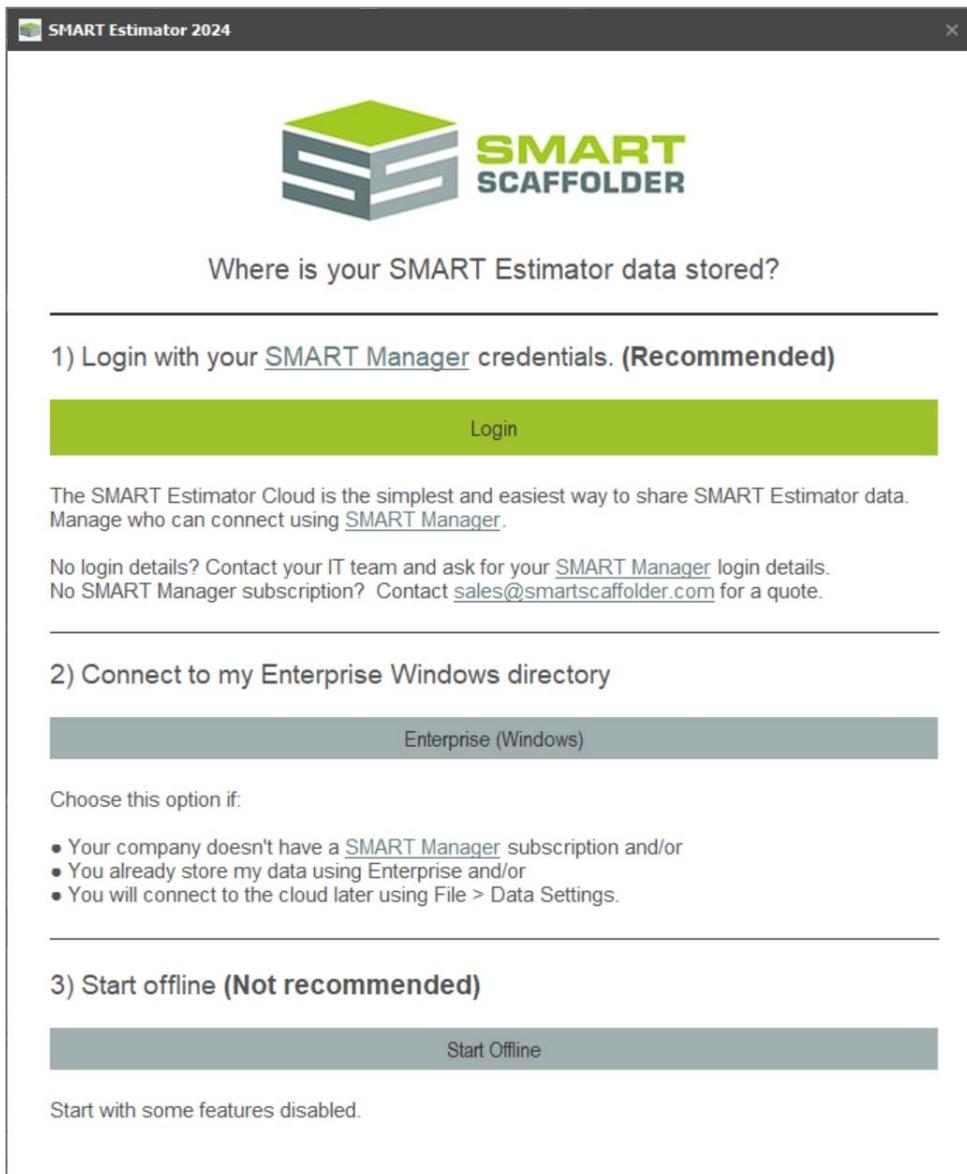


You can start the application by either double-clicking the icon on your desktop, or by selecting the application from Start > SMART Estimator 2024.



You may have more than one version of SMART Estimator installed, e.g. SMART Estimator 2023 and SMART Estimator 2024.

Choose the version that you want to run by selecting the corresponding icon / tile.



SMART Estimator 2024

 **SMART
SCAFFOLDER**

Where is your SMART Estimator data stored?

1) Login with your [SMART Manager](#) credentials. **(Recommended)**

Login

The SMART Estimator Cloud is the simplest and easiest way to share SMART Estimator data. Manage who can connect using [SMART Manager](#).

No login details? Contact your IT team and ask for your [SMART Manager](#) login details.
No SMART Manager subscription? Contact sales@smartscaffolder.com for a quote.

2) Connect to my Enterprise Windows directory

Enterprise (Windows)

Choose this option if:

- Your company doesn't have a [SMART Manager](#) subscription and/or
- You already store my data using Enterprise and/or
- You will connect to the cloud later using File > Data Settings.

3) Start offline **(Not recommended)**

Start Offline

Start with some features disabled.

Connect to the Enterprise Server

When you first launch, you will be asked where you want to store your data:

▶ **Login**

Typically, you should choose this option. Pick this, then log in to the **SMART Scaffolder Cloud** with the email and password you were sent with your download.



If you don't know your login details, contact sales@smartscaffolder.com to get them.

▶ **Enterprise (Windows)**

This option is only for customers not yet ready to upgrade to the SMART Scaffolder Cloud.

▶ **Start Offline**

Not recommended. This option will disable many features.

Create your first project

When you first launch the application, you will see the **New** screen.



You can also open this screen by pressing the **File** menu button and selecting the **New** option.

To create a new project (quote), press **New Enterprise Server Project**.



New Enterprise Server Project (Recommended)	New Project
 <p>New Enterprise Project Create a new project on your SMART Scaffolder Enterprise Server. The contract number will be assigned automatically.</p> <p>This option unlocks additional functionality later. Using this option is recommended.</p>	 <p>New Project Create a new project which can be saved to a location you choose. Your next contract number will be chosen automatically.</p> <p>Use this option only if the server is not available, or if you are testing.</p>
Revision	Variation
 <p>Revision Create a revision (copy with edits) of an existing project on your SMART Scaffolder Enterprise Server.</p> <p>Use this if you have had feedback from a prospective client and want to create a Revision of an existing quote.</p>	 <p>Variation Create a variation (blank quote with related quotation number) from an existing project on your SMART Scaffolder Enterprise Server.</p> <p>Use this if you have been asked to quote for additional work, to create a Variation of an existing quote.</p>
Risk Assessment	Method Statement
 <p>New Risk Assessment Create a new risk assessment document.</p> <p>Use this option to create a Risk Assessment RAMS document.</p>	 <p>New Method Statement Create a new method statement document.</p> <p>Use this option to create a Method Statement RAMS document.</p>

Enter quote details

Now select the quote number, dates, pricing rates to use, quote description, customer address and site address for this new project.

Create New Enterprise Server Project

Quote number Prefix <Next> Suffix 

Follow-up date **Do not remind me to follow up this quote**  Created date 05/07/2023

Pricing rates Standard Start date 05/07/2023

Description

Customer

Select from customer address book

Group (none)

Company name 0 / 0

Business Address

Town County

Country Postcode

Fax Website

Phone Mobile

Email

Contact person :
Mr Forename Surname

Site

Select from site address book

Group (none)

Company name 0 / 0

Business Address

Town County

Country Postcode

Fax Website

Phone Mobile

Email

Contact person :
Mr Forename Surname

Create Project Cancel

Create Project

- 

It is recommended that you enter the *Customer Address* now if you know it. This will appear on the quotation (if you have **Quote IT**).
- 

If you know the *Site Address*, please enter it now as well. This will be used for pricing transport, importing a site satellite photo and for the TG20 check (if you have **Price IT**, or **BIM Toolbox**).
- 

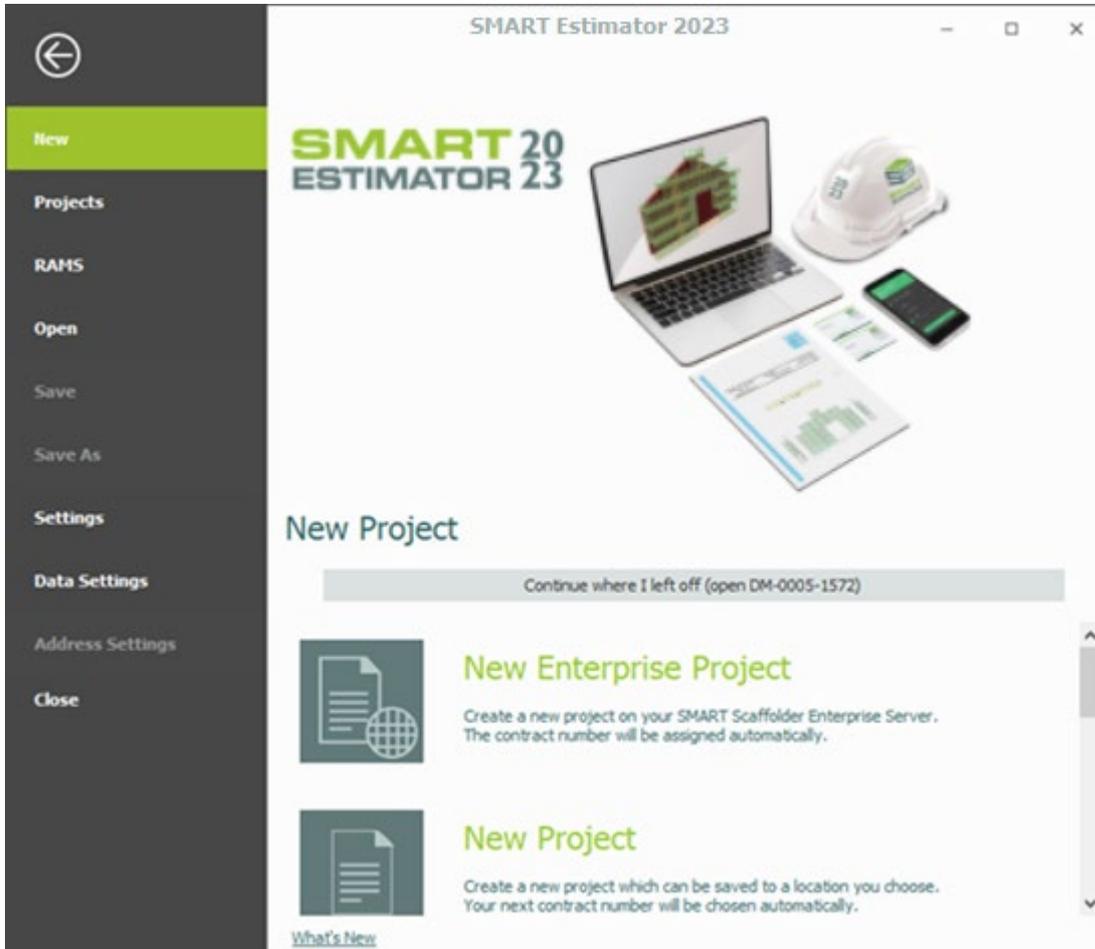
It is helpful to enter a *Follow-up date* now. This will make SMART Estimator remind you to follow-up the customer about this project when you launch SMART Estimator on the selected date.

Press **Create Project** to create the project file.

If you entered a new address, you will be asked if you want to save it.

Re-open my last project

Next time you open SMART Estimator, you can press the **Continue where I left off** button. This will quickly open the last project you saved so you can continue working on it.



Only projects saved to the Enterprise server can be opened with **Continue where I left off**.

Select your settings

This section explains some of the basic settings you might want to change before you start working with SMART Estimator.



You can open the settings screen by pressing the **File** menu button and selecting the **Settings** option.

Setting the language

You can set a different language for the program if you prefer. For instance, you might choose *US English* instead of *UK English*.

To change the language, open the **File** menu in the top left. Select the **Settings** menu option and choose a new language from the **Language** menu. The software will need to restart to use the new language.

My Settings

Choose preferred language Measurements



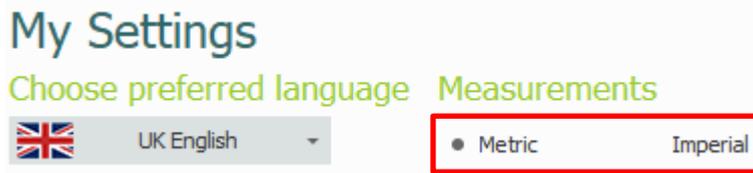
UK English

Metric

Imperial

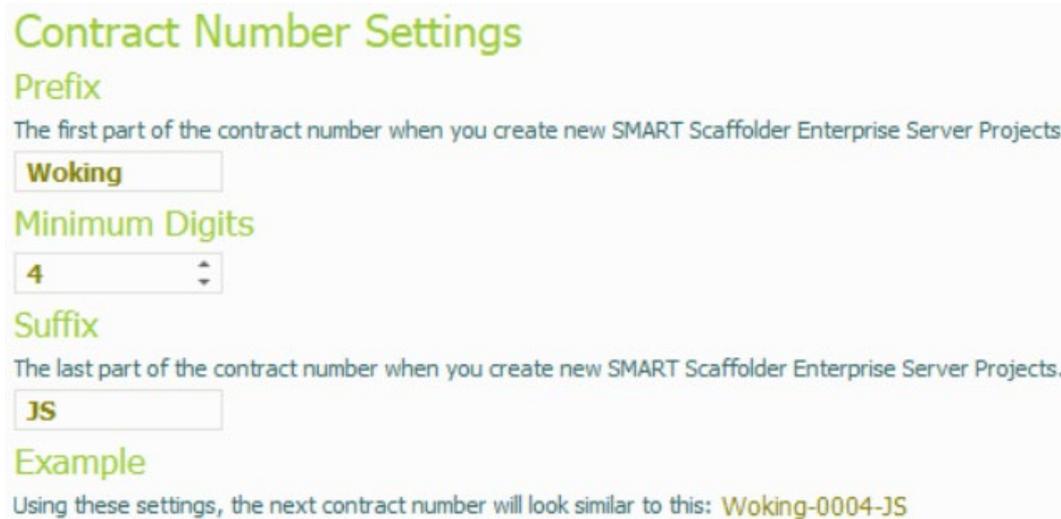
Setting the measurement units

Now, it may help to set the units that the software uses to either **Metric** (metres) or **Imperial** (feet and inches) as you prefer. This will affect all the reports as well as the 3D model.



Setting the contract number format

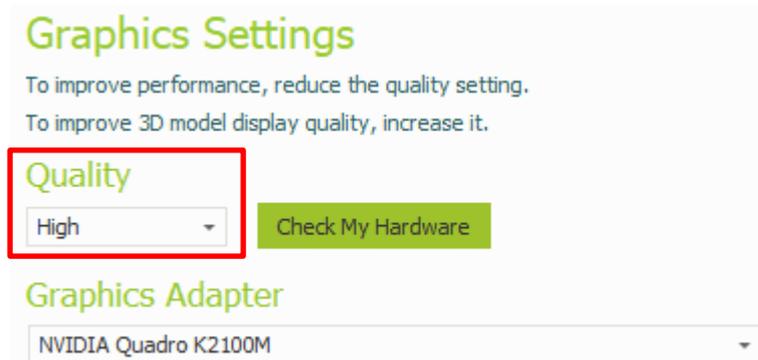
SMART Estimator automatically assigns contract numbers for you. To choose how these numbers will be created, simply set the *Prefix*, *Minimum Digits* and *Suffix* settings. An example of how your chosen settings will look is shown below them.



Setting the graphics quality

The graphics quality should be set to **High** to get the best experience from SMART Estimator.

If performance of the 3D modelling is very poor, you may find that reducing the graphics quality improves this.



You can use the **Check My Hardware** option to see if SMART Estimator recommends any changes to your hardware to improve performance.



You must restart SMART Estimator before any changes to the graphics quality will take effect.



Changing the **Graphics Adapter** is not usually recommended, as SMART Estimator will choose the best one by default.



The **High** graphics setting is not supported for 1st and 2nd generation Intel® on-board graphics processing units.

If the 3D model does not display correctly, you can try reducing the graphics quality to correct this.

Setting up auto-save

SMART Estimator saves copies of your work regularly. You can choose the frequency and number of copies kept.

Auto save

Enable auto-save

Auto-save location

C:\Users\john smith\AppData\Local\Temp\SMART Estimator ... Apply

Auto-save frequency (hh:mm:ss)

Auto-save every 30 minutes

Maximum auto-saves per project

3 auto-saves

▶ Enable auto-save

This should usually be ticked **on**. De-selecting this will disable auto-save!

▶ Auto-save location

The default location is the **Temp** directory, which is the usual place for temporary files to be stored in Windows. However, you may choose any directory that you prefer.

▶ Auto-save frequency

How often your work is saved. Saving more frequently will help recover more data if you ever need the auto-saved file. However, auto-save can slow down SMART Estimator for a short time. Please choose a frequency that is right for you.

▶ Maximum auto-saves per project

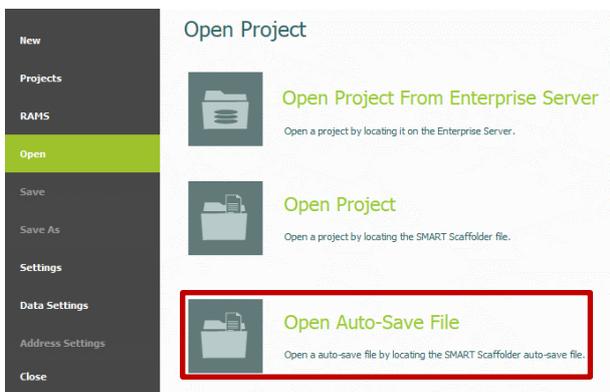
The number of copies of the same project that are kept. Higher numbers will use up more storage on your computer.



A minimum of two auto-saves per project is recommended.
A minimum of 15 minutes between auto-saves is recommended.

Recovering an auto-save

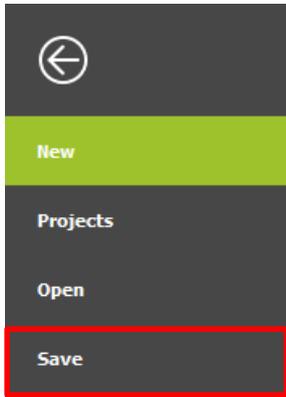
To load an auto-saved file, you can use the **Open Auto-Save File** option from the **Open** screen in the **File** menu.



Auto-save files use the file extension **.mlTautosave**

Saving your work

You can save your work at any stage, by pressing the **Save** button on the *Quick Access* toolbar (at the top of the window) or by clicking on the **File** menu button:

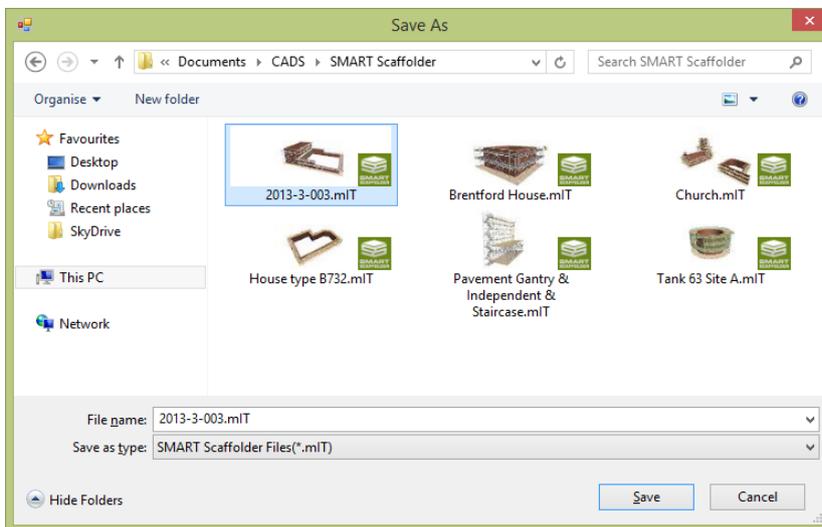


It's a good idea to frequently save your work. You can re-open your project again by selecting the **Open** option.



If you make a mistake at any time you can also use the **Undo** and **Redo** buttons on the **Quick Access** toolbar.

When you select the **Save** option you will be prompted to select a name for the file:



Performance: best practice

To get the best experience using SMART Estimator follow the best practices below:

Maximum concurrent estimators

Many estimators sharing data storage and working at the same time can cause performance to drop during activities like saving or creating a new project. To prevent this, use separate stores for large groups of estimators.

SMART Estimator Version	Maximum concurrent estimators recommended
SMART Estimator 2024.0 <i>Windows storage</i>	4
SMART Estimator 2024.0 <i>Cloud storage</i>	30

Maximum stored projects

Keeping older projects stored on the server can reduce performance when searching for projects, saving, and creating a new project. To prevent this, consider archiving older projects away from the live data store.

SMART Estimator Version	Maximum projects recommended
SMART Estimator 2024.0 <i>Windows storage</i>	800
SMART Estimator 2024.0 <i>Cloud storage</i>	30,000

Appendix 1: Install on a Dedicated Server

This section only applies if you have not yet installed, and you want to save your data to a separate, shared server. We refer to your saved data as “Enterprise” for convenience.

The steps required are as follows:

- ▶ Install Enterprise on your server;
- ▶ Share the Enterprise directory so other computers can access it;
- ▶ Install SMART Estimator on your computer(s).

Install Enterprise on your server

- ▶ Download SMART Estimator as described in the **Download SMART Estimator** section, above.
- ▶ Choose **Install Enterprise Only**.



X

SMART SCAFFOLDER

SOFTWARE FOR
SCAFFOLDING
PROFESSIONALS

**SMART
ESTIMATOR**

2024.0 (14/02/2024)

▶ **INSTALL SMART ESTIMATOR 2024**

> Install Enterprise Only ←

> Read the release notes

PRODUCT SUPPORT CENTRE

Open 09:30 - 17:00

Monday to Friday

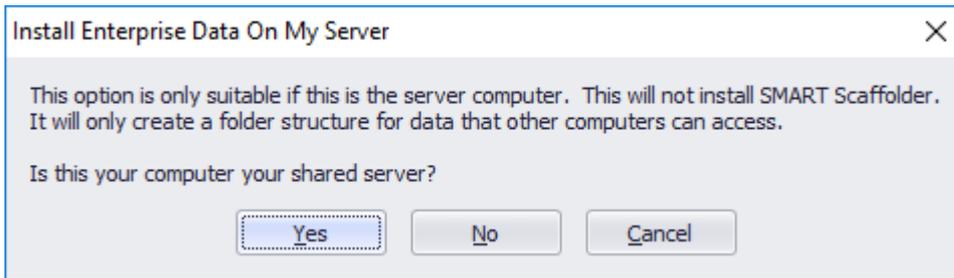
Tel: +44 (0)1202 603733

support@smartscaffolder.com

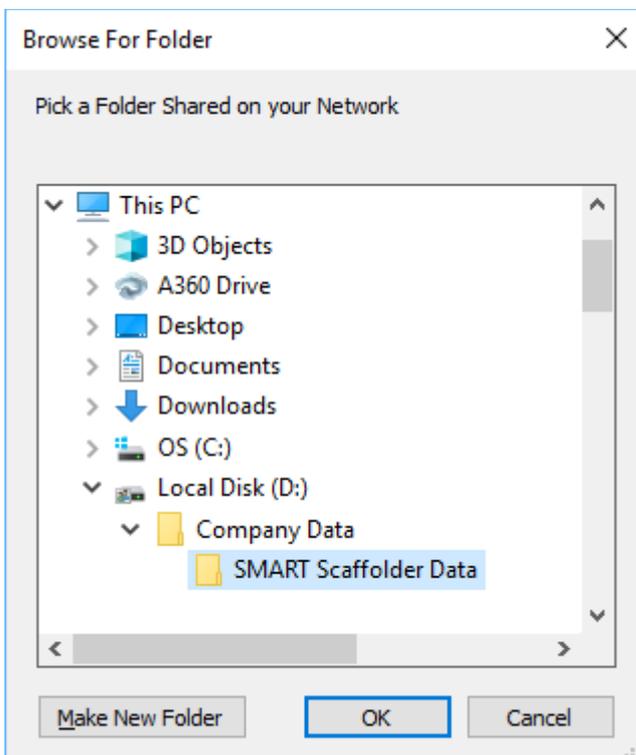
www.smartscaffolder.com

CADS

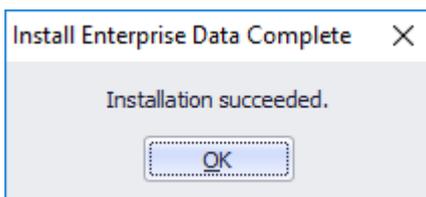
- ▶ When asked if this is your server, choose **Yes**.



- ▶ Select a location for your Enterprise data. We recommend you create a dedicated folder to store your Enterprise data in; this folder will then need to be shared so all users can access it. Then press **OK**.



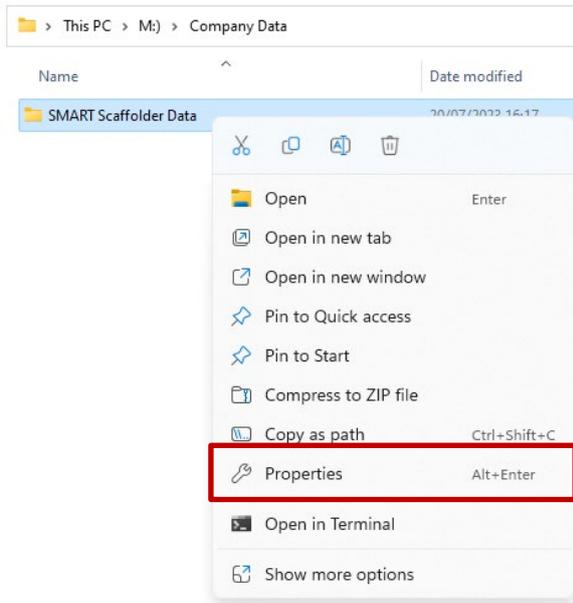
- ▶ Press **OK** once the installation completes.



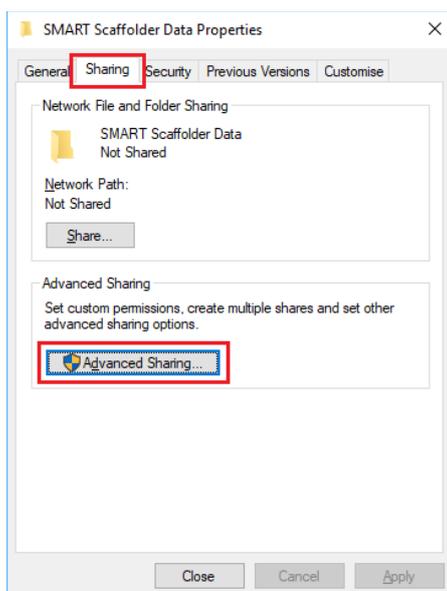
1.1 Share the Enterprise directory so other computers can access it

To enable all users to access your Enterprise data, you will need to share the folder you created in the above step.

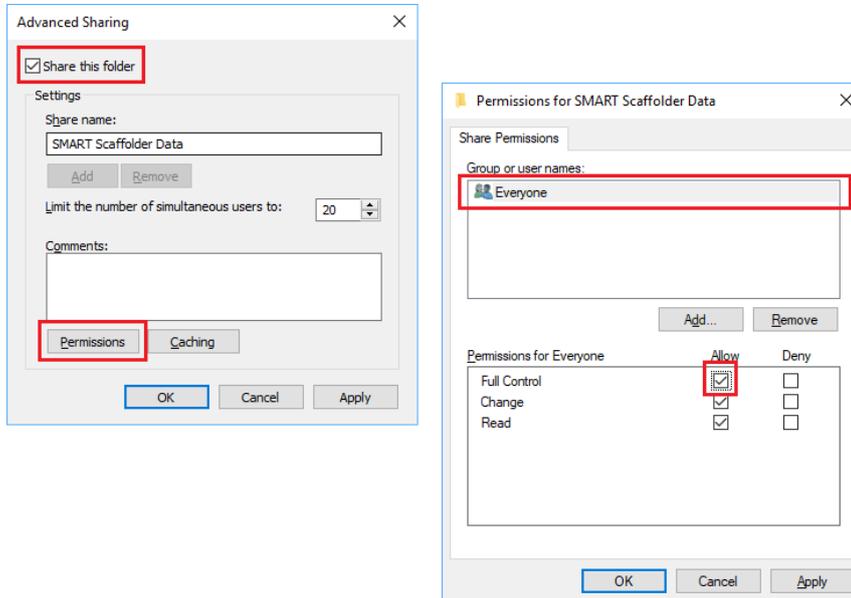
- ▶ To create the share, open the folder where the dedicated folder from the previous step was created (In our example above this will be **M:\Company Data**).
- ▶ Right click on the dedicated folder (in our example this is called **SMART Scaffolder Data**) and pick the **Properties** option at the bottom of the list.



- ▶ Next, select the **Sharing** tab and then pick the **Advanced Sharing...** button.



- ▶ Tick the **Share this folder** box and then pick the **Permissions** button at the bottom of the dialog.
- ▶ Ensure that the **Everyone** option is selected and then tick the **Full Control** box.



- ▶ Pick the **OK** button to close the permissions dialog.
- ▶ Then pick **OK** again to close the sharing dialog.
- ▶ Finally, pick **OK** again to close the properties dialog.

1.2 Install SMART Estimator on your computer(s)

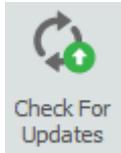
Install SMART Estimator as per the instructions in the **Install SMART Estimator** section (above).

When asked for the location of your Enterprise Server, choose the shared directory you created on the server.

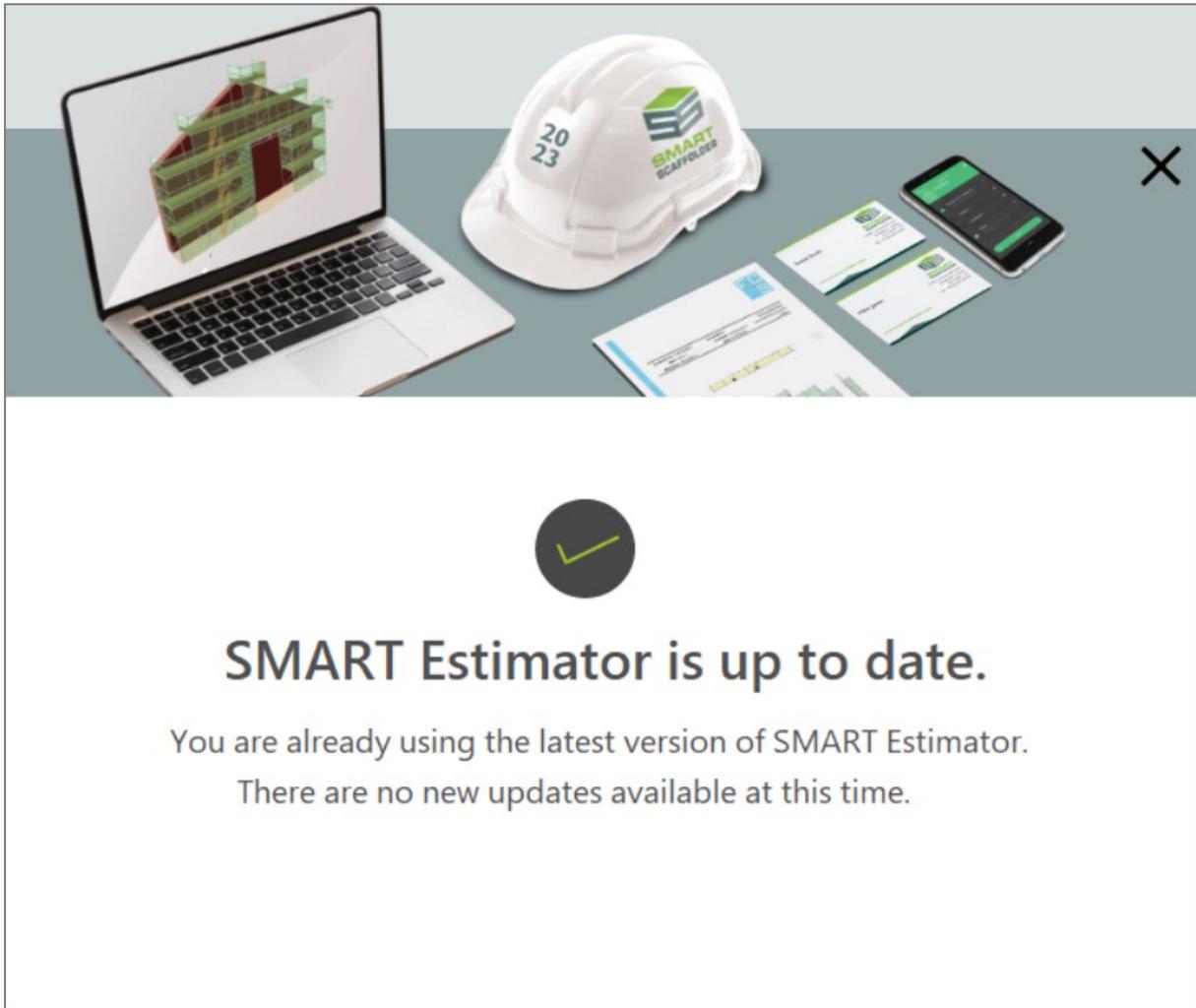
e.g. \\ServerName\SMART Scaffolder Data

Appendix 2: Check for updates

You can check for the latest version of SMART Estimator using the **Check for Updates** tool in the **Help** menu:



Press the tool and SMART Estimator will automatically check for newer versions:



Feedback

Thank you for choosing SMART Estimator.

We are always striving to improve the product so please contact us with your feedback. We are always keen to hear new ideas and if you experience any problems with the software we want to hear about them so that they can be resolved.



You can contact us via:

- ▶ Our website support centre at www.smartscaffolder.com/support.html;
- ▶ Email on support@smartscaffolder.com;
- ▶ Telephone on (01202) 603733 from Monday to Friday between 09:30 and 17:00.