SMART ESTIMATOR 2022

SMART SCAFFOLDER

INVOICING LINK

USER GUIDE

CADS

AUTODESK
Authorised Developer

Microsoft Partner
Gold Application Development

Contents

Introduction

Thank you for choosing SMART Estimator.

SMART Estimator **Invoicing link** allows you to push data from SMART Estimator into the following accounting packages:

- ▶ Sage 50 desktop
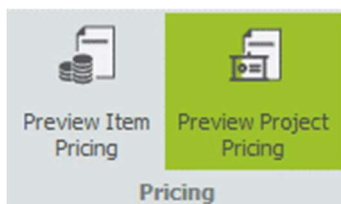
- ▶ Quickbooks desktop

- ▶ Xero

> ⚠ **Other versions may or may not have suitable imports. Contact your accounting package provider before purchasing or using Invoicing link.**

> ⚠ **Make sure you have created some items and scaffolds before using the Invoicing link!**

To access the **Invoicing link** exports, open the **Price IT** tab and choose the **Preview Project Pricing** view.
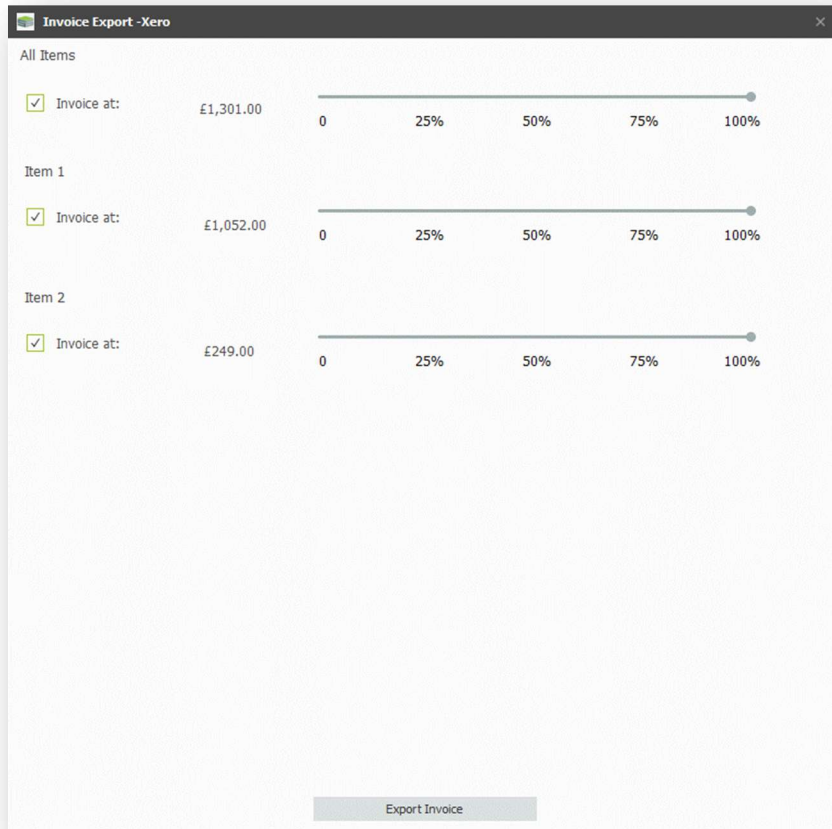

In this view, some export buttons are available. Choose the one for the accounting package you want to export to:

Export Xero Invoice

Choose how much to invoice

After choosing to export to Xero, a pop-up message like this will appear:

Drag the scroll bars to choose what percentage of each item to invoice. The top bar (All Items) will update automatically to show what percentage of the overall total you are invoicing.

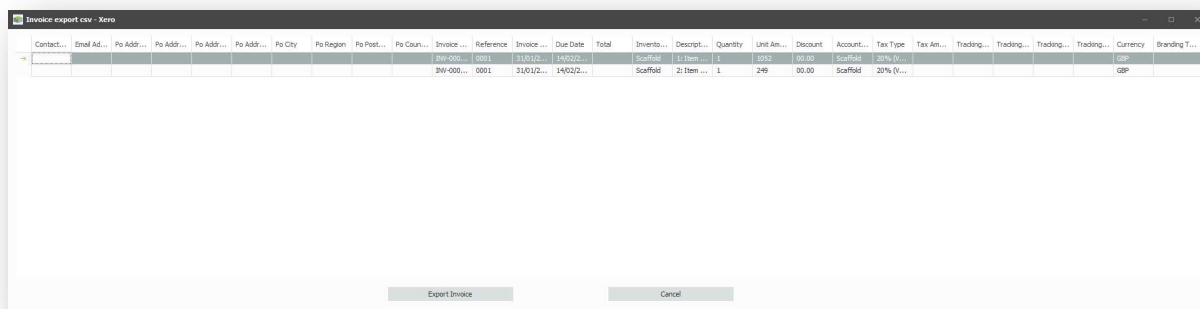To set all items to the same percentage, drag the top (All Items) bar only.

Finally, press **Export Invoice** to review the export file that will be created.

Review the export file

Now, review the values that will be pushed through to the export.

> ⚠ **You should not add the comma symbol "," to any text, as this will break the export file.**

Review the values and press **Export Invoice**.

You will be prompted to save the export file. Choose a location and press save.

Import into Xero

> ⚠ **CADS are not responsible for developing, maintaining or supporting Xero. For any assistance with the following steps, please contact your Xero provider. This information is accurate to the best of CADS knowledge at the time of publication.**
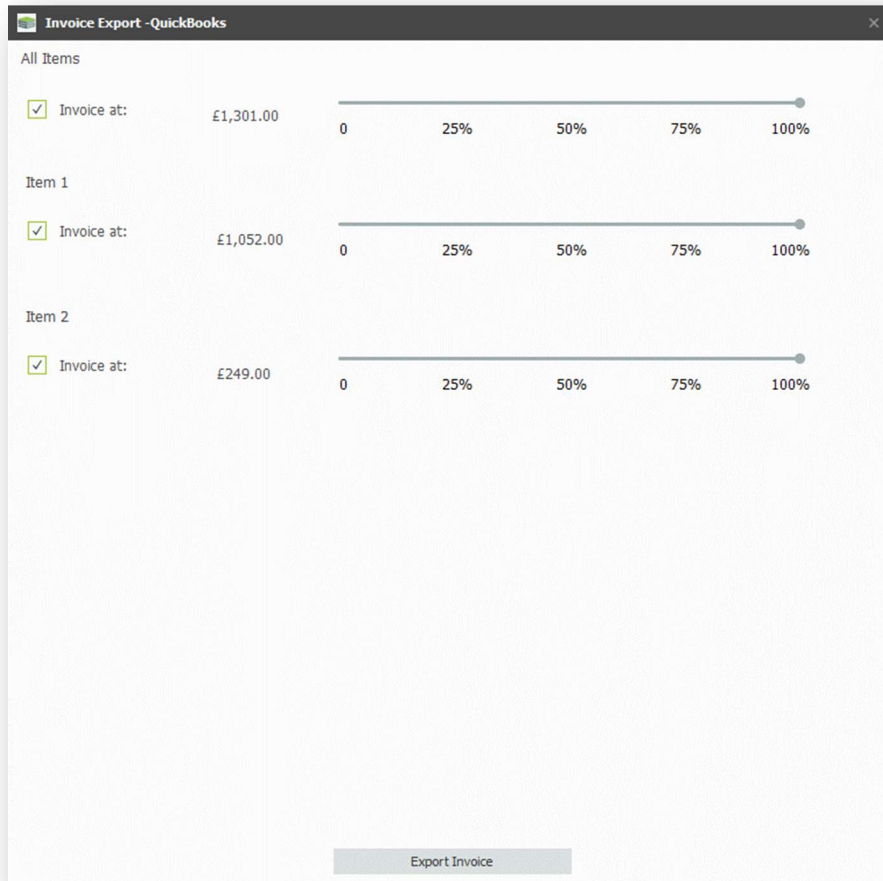
The video at this location may help with importing data into Xero:

https://tv.xero.com/detail/video/5127747322001/importing-sales-and-purchases-in-xero

Export QuickBooks Invoice

Choose how much to invoice

After choosing to export to QuickBooks, a pop-up message like this will appear:

Drag the scroll bars to choose what percentage of each item to invoice. The top bar (All Items) will update automatically to show what percentage of the overall total you are invoicing.

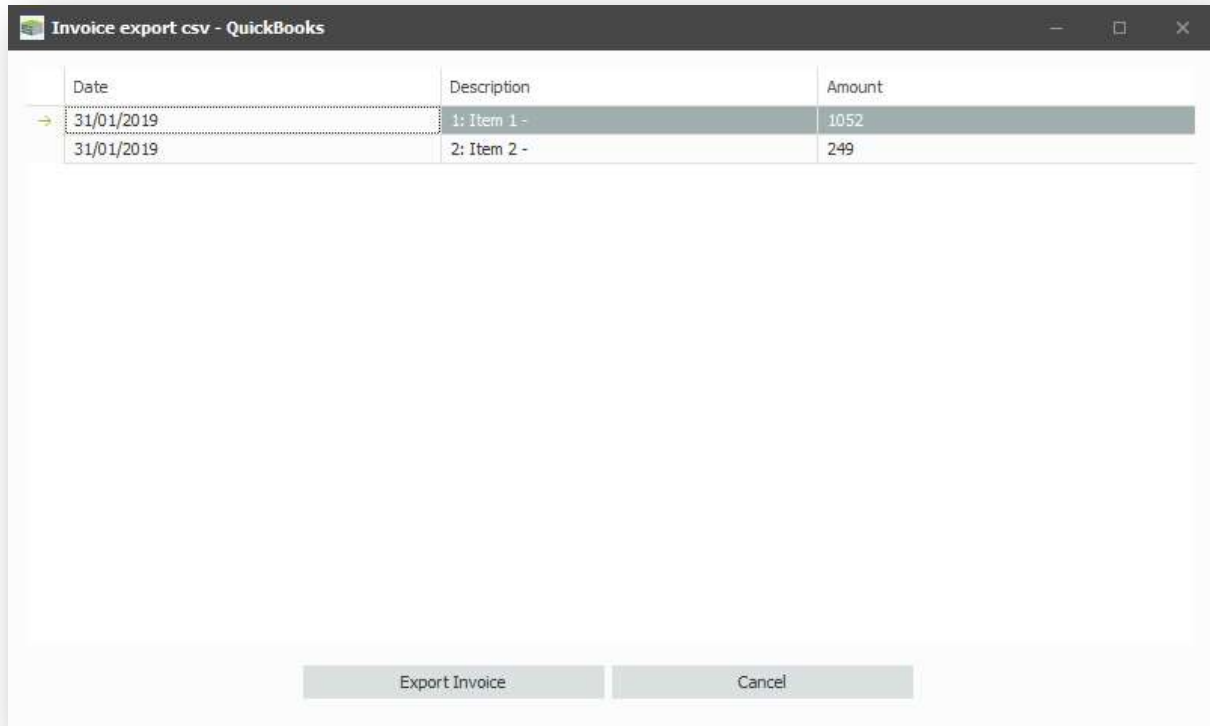To set all items to the same percentage, drag the top (All Items) bar only.

Finally, press **Export Invoice** to review the export file that will be created.

Review the export file

Now, review the values that will be pushed through to the export.

> ⚠️ **You should not add the comma symbol "," to any text, as this will break the export file.**

Review the values and press **Export Invoice**.

You will be prompted to save the export file. Choose a location and press save.

Import into QuickBooks

> ⚠️ **CADS are not responsible for developing, maintaining or supporting QuickBooks. For any assistance with the following steps, please contact your QuickBooks provider. This information is accurate to the best of CADS knowledge at the time of publication.**
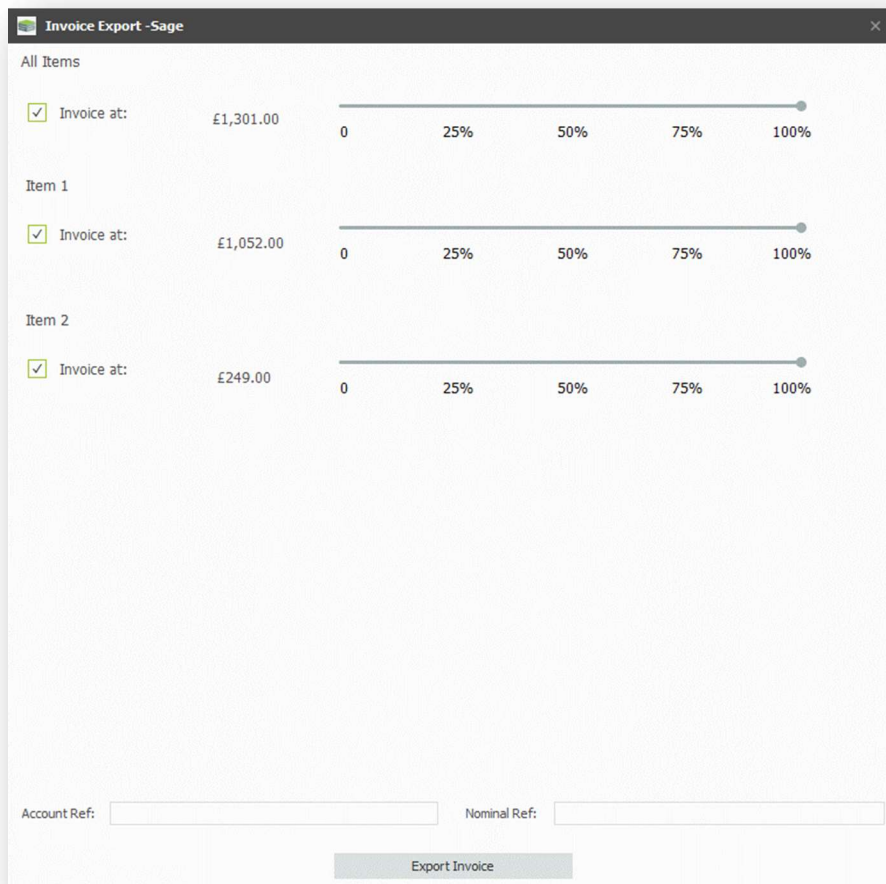
The information at this location may help with importing data into QuickBooks:

https://community.intuit.com/articles/1458636-import-bank-transactions-from-excel-csv-file-to-quickbooks-online

Export Sage Invoice

Choose how much to invoice

After choosing to export to Sage, a pop-up message like this will appear:

Drag the scroll bars to choose what percentage of each item to invoice. The top bar (All Items) will update automatically to show what percentage of the overall total you are invoicing.

To set all items to the same percentage, drag the top (All Items) bar only.

Sage requires an **Account Ref** and **Nominal Ref,** which will be determined by your settings in Sage. If you don't know these, you should find them out now. Enter these values in the boxes.

Finally, press **Export Invoice** to review the export file that will be created.

Review the export file

Now, review the values that will be pushed through to the export.

> ⚠️ **You should not add the comma symbol ","," to any text, as this will break the export file.**

Review the values and press **Export Invoice**.

You will be prompted to save the export file. Choose a location and press save.
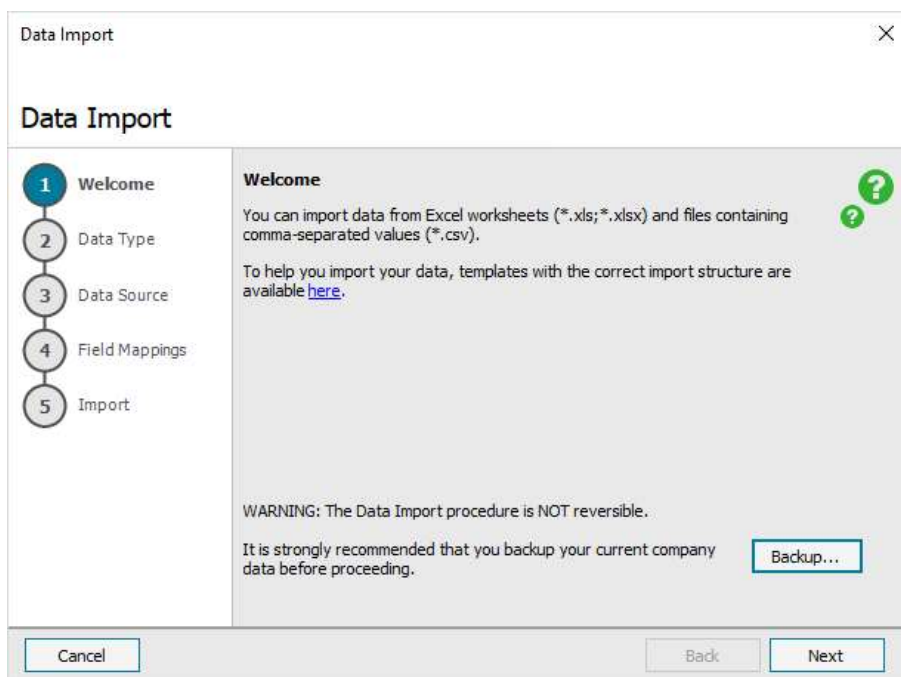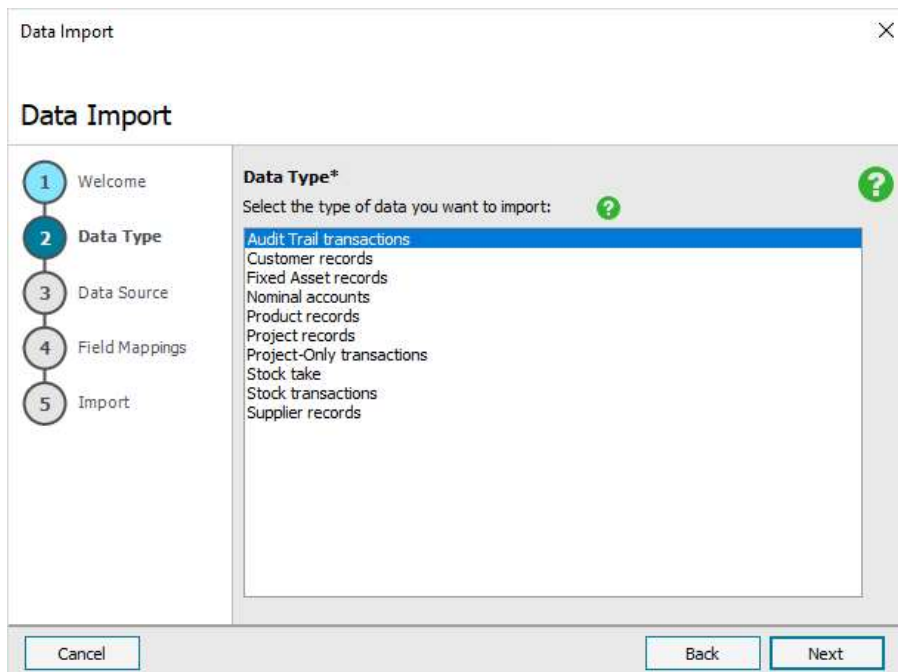
Import into Sage

To import into Sage, Choose **File**, then **Import…**
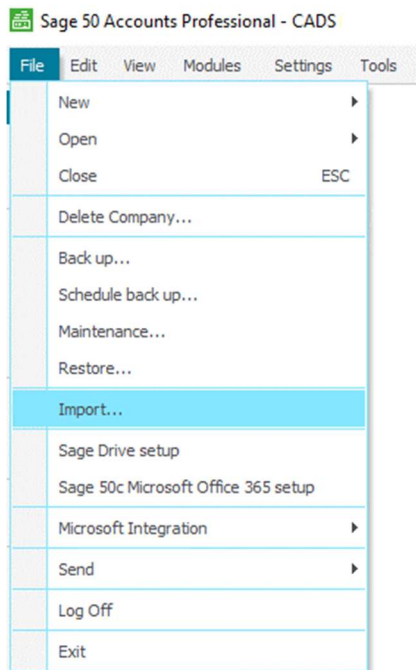
▶ Press **Next**.
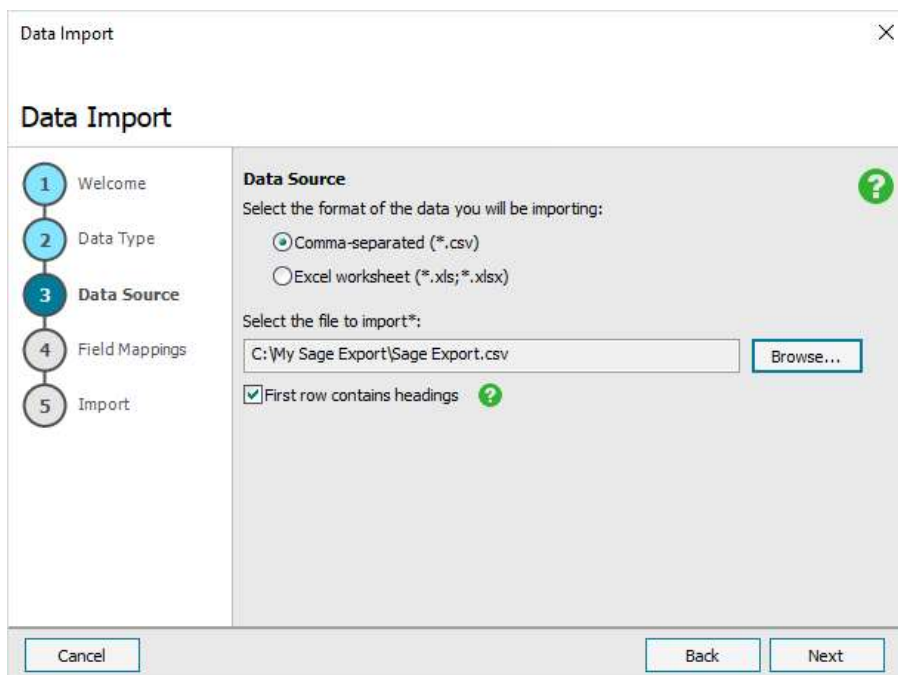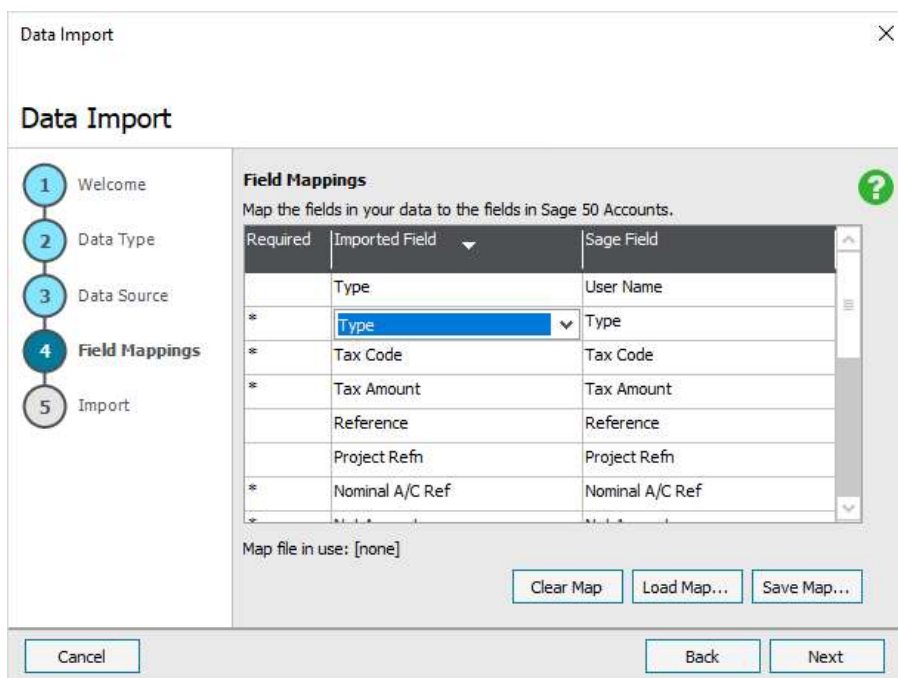
▶ Choose **Audit Trail transactions** and press **Next**.

▶ Press **Browse…**, select your export file and press **Next**.

▶ Usually, there will be no changes required on this screen, so press **Next**.

▶ Press **Import**.

You have now imported you data into Sage.

Using the other SMART Estimator products

The best way to use the SMART Estimator products is to use them together. Every product is designed to enhance the rest of the suite.

SMART Estimator **Invoicing link** can be used with the rest of the SMART Estimator products:

Model IT, Schedule IT and BIM Toolbox

Create the scaffolds that will be invoiced.

Report IT

Take your schedule of scaffolds and create instant reports of the components used, including the weight as well as technical drawings.

Price IT

Price IT is required to use **Invoicing link**.

Quote IT

Generate quotations for the invoiced project.

> For more information about the other SMART Estimator products, please refer to their user guides, which are available from the Help tab.

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 +44 (0)1202 603733 from Monday to Friday between 09:30 and 17:00.