



QUOTE IT USER GUIDE

Version: 2022.0



Contents

Introduction	1
Print a quotation	2
Email a quotation	3
Customise your quote	4
Create your own quote template	5
Note on saving	5
Create your own quote template	5
Copy an existing quote to create your own template	6
Adding headers and footers to your template	9
Select the covering letter	10
Select the header	11
Replace the company logo	11
Adding the footer logos	13
Repeating a header on every page	16
Set your signature graphic	16
Changing text within the covering letter	17
Changing text within the item description	20
Changing the active item	27
Adding and removing sections	28
Add a new section	28
Why not delete the sections that I don't want first?	28
Delete any sections that you don't want	28
Change the order of sections	28
Section configuration	29
Begin section	29
Repeat section	29
Import or export a quote template	30
How to import a quotation template	30
How to export a quotation template	31
Edit a single quotation	32
Editing the quotation text	32
Editing SMARTText	32
Exploding SMARTText	33
Edit the clauses and conditions	35
Clauses versus conditions	36

Add or remove a clause from the quotation	36
Edit clause text.....	37
Add a clause to the list.....	37
Change the clauses view	39
Save changes to the clauses.....	39
Change the advanced clause settings	40
Set a clause to be selected automatically.....	40
Set clause recommendations.....	41
Erase a clause.....	41
Save changes to the clauses.....	41
Check your spelling	42
Address books	43
Customer addresses.....	43
Save a site address	48
Edit the lead-in descriptions	50
SMARTText descriptions	51
Project SMARTText	51
General.....	51
Pricing.....	51
Addresses	52
Item SMARTText	53
General.....	53
Pricing.....	53
Description	55
Using the other SMART Estimator products.....	56
Model IT	56
Schedule IT	56
Report IT.....	56
Price IT.....	56
BIM Toolbox.....	56
Feedback	57

Introduction

Thank you for choosing SMART Estimator.

SMART Estimator **Quote IT** is a highly customisable document creator. Information about your scaffolding is automatically shown in the quote.

Access

The scaffolding will include 1 ladder access built from the ground.

Loading

The scaffolding will support a maximum of 1 working lift with a uniformly distributed load of 2.00kN/m² and 1 partially-loaded lift with a uniformly distributed load of 1.00kN/m². These loads must not be exceeded.

Text and wording can be easily customised. The layout, images and fonts can be set to match your company branding.

The scaffolding will be built with double guard rails on boarded lifts.



Boards

Boards will be placed once only by us at all lifts.
Timber toe boards will be provided on all decked lifts.

Print a quotation

When you first open the **Quote IT** tab, you will see that a basic quotation document has been created for you. It shows details about this project, and (if applicable) details of the item which is active in the *project browser*.

Customer:
[CUSTOMER CONTACT
FORENAME] [CUSTOMER
CONTACT SURNAME]
[CUSTOMER ADDRESS]

Site:
[SITE ADDRESS]


Your logo
here
[MY ADDRESS]
[MY TELEPHONE]
www.example.co.uk

Date 15/06/2015
Contract Number 0001
Description

Dear Mr ,

Thank you for your valued enquiry. We are pleased to submit this quotation for the scaffolding that you have requested.

The total price for the scaffolding in this quotation will be £256.00 including 4 weeks hire per item as described in the enclosed breakdown. After this period the total additional hire charge will be £134.00 per week or part thereof. All prices exclude tax.

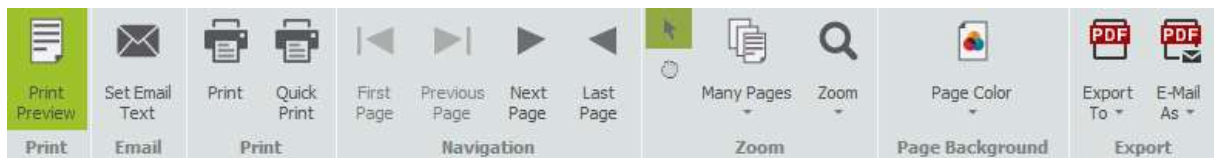
Please do not hesitate to contact us if you require further assistance.

Yours faithfully,

To print your quotation, click the **Print Preview** button in the toolbar:

You will see that all of the sections in this quotation have been placed in order. Some of the sections have been repeated, because they have information about items. Other sections have not been repeated, because they only have information about the project.

A new toolbar is displayed while previewing a quotation:

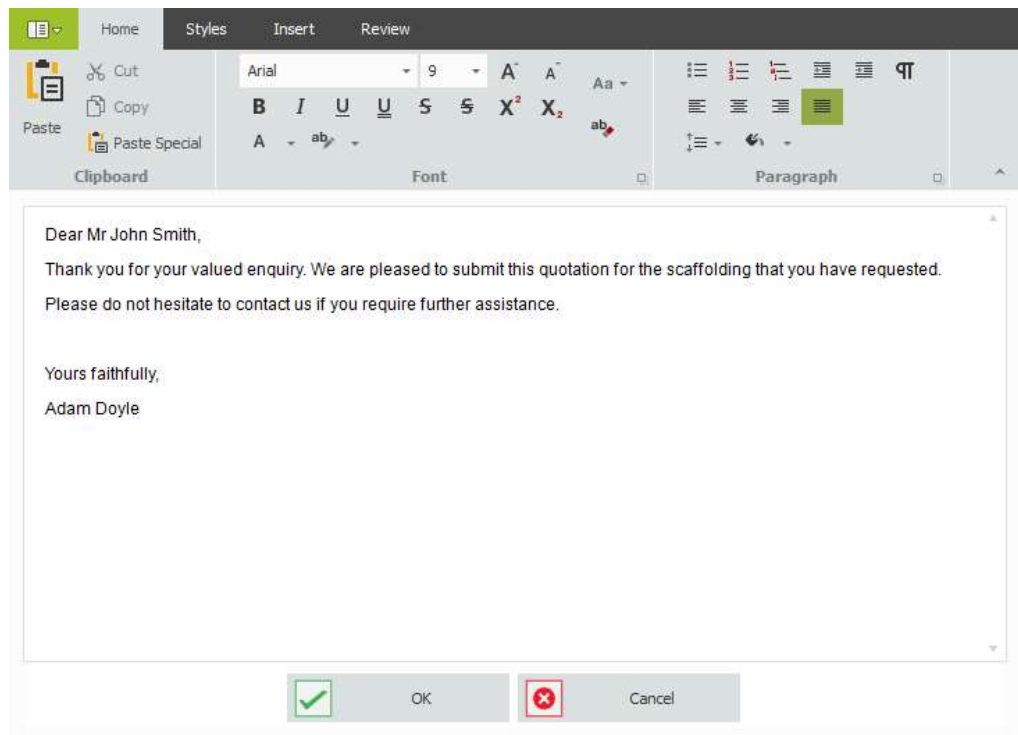


Feature	Description
Print Preview	Closes the preview of the quotation and returns to the quotation editor.
Set Email Text	Options for setting the text shown when using the Email As option.
Print	Prints the report, providing options to select the required printer and paper options.
Quick Print	Prints the report to the default printer.
Page Setup	Allows you to choose the paper size, margins, and orientation: portrait or landscape.
Navigation	Provides options to move back and forth through the pages of the report.
Zoom	Zooms the report to allow you to see it in detail or to view multiple pages.
Page Colour	Allows you to specify the background colour to use while printing, for example if your company uses a coloured background on its stationery.
Export to	Allows you to export the quote to an Adobe PDF or a Microsoft Word document.
Email as	Allows you to create an email with the quotation attached as an Adobe PDF or Microsoft Word document.

To close the preview and return, just press the **Print Preview** button again.

Email a quotation

Creating an email with your quotation attached is discussed in the **Print a quotation** section, above. It is possible to customise the text that will appear in your email by default. To do this, from the main quotation view, select the **Set Email Text** button.

A screenshot of the "Set Email Text" dialog box. The dialog has a ribbon at the top with tabs: Home, Styles, Insert, and Review. The "Home" tab is active, showing options for Clipboard (Paste, Cut, Copy, Paste Special), Font (Arial, size 9, bold, italic, underline, strikethrough, subscript, superscript, text color, background color), and Paragraph (bullet points, numbered list, decrease indent, increase indent, left align, center, right, justified, link, unlink, insert image, insert table, insert text box, insert shape, insert comment, insert signature line). The main text area contains the following text:

Dear Mr John Smith,

Thank you for your valued enquiry. We are pleased to submit this quotation for the scaffolding that you have requested.

Please do not hesitate to contact us if you require further assistance.

Yours faithfully,

Adam Doyle

At the bottom of the dialog are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

Change the text in this box and press **OK** to apply your changes. You can even include **Project SMARTText** and images in your email text.



To save this text for future projects, use the **OK** button.

To go back to the last saved version of this text, use the **Cancel** button.

Customise your quote

You will probably want to replace the SMART Estimator quotation with one customised for your business. There are two types of customisation for you to consider:

- ▶ Customise the quotation template;

This means permanently changing the way the quotation looks to suit your business.

You can, for example, add your company logo and update the wording shown on the covering letter.

Please see the **Create your own quote template** section for details of how to do this.

- ▶ Change the wording on a single quote.

Adjusting the wording on a single quote is straightforward.

Please see the **Edit a single quotation** section for details of how to do this.

Create your own quote template

Note on saving

You may have multiple quotation templates. By default there are two, called “Full Quotation” and “Summary Quotation”.

When you save a project as a SMART Estimator (.mIT) file (or to your Enterprise Server) not all quotation templates are saved to the file. Quotation templates are saved to the file using the following logic:

- ▶ If you have viewed or edited a template since you started this estimate, it is saved.
- ▶ If this project already included some templates when you opened it (and you haven’t deleted them) those templates are saved.
- ▶ If you haven’t viewed any templates, the first one in the list is saved.

Create your own quote template

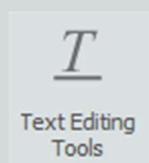
Before you start editing quotes and changing the way the quote looks, we would advise you to create new templates based on the templates supplied with the software. These templates are stored inside a folder named *My Quotes* (or *Shared Quotes*).

If you have been sent a quotation template (.mITq) file, please skip to the **Import or export a quote template** section.

Editing tools

It is possible to edit the document without using text editing tool buttons. For example, if you highlight some of the text and press the *Ctrl* and the *B* key together, the text will become bold.

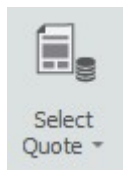
However, it is much easier to make changes to the document using the text editing tools. To show these tools, select the **Text Editing Tools** button in the main toolbar.



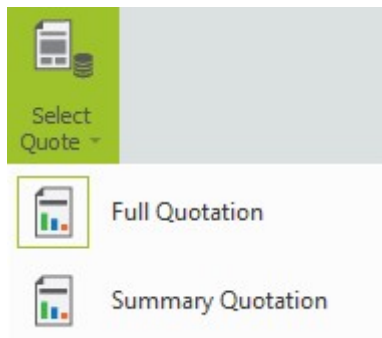
You will notice that some new buttons appear in the main toolbar. Also, a new toolbar appears above the section document.

Copy an existing quote to create your own template

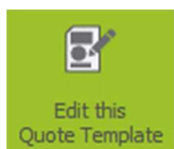
Open a template that you would like to copy by selecting it from the **Select Quote** drop-down menu.



For the purposes of this example we are going to copy the “Full Quotation”.



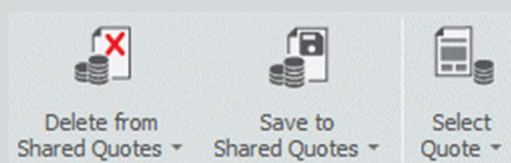
Now open the template editing view by selecting the **Edit this Quote Template** button.



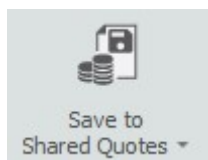
My Quotes / Shared Quotes

There is a special folder called **My Quotes**. If you have the network version, and are connected to the **Enterprise Server**, this folder is called **Shared Quotes**. The **Shared Quotes** folder is shared by everyone on your network. All of your quotation documents are stored in this folder.

It is possible to save and delete quotes from **My Quotes / Shared Quotes**.

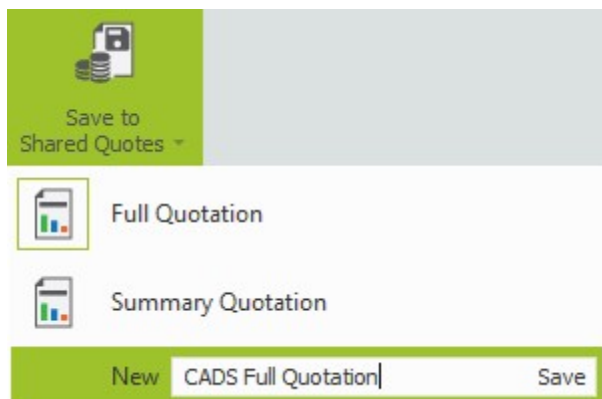


To create a copy of this Quote, including all of its section templates, select the **Save to My Quotes** (or **Save to Shared Quotes**) button.

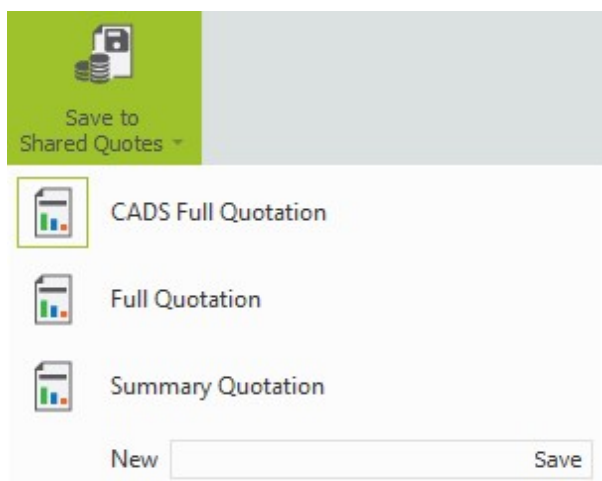


At the bottom of the drop-down menu, click in the **New** text box and type a name for your new Quote, such as “Your Company Name Full Quotation”, i.e. “CADS Full Quotation”.

Click on **Save** to create the copy of the template.

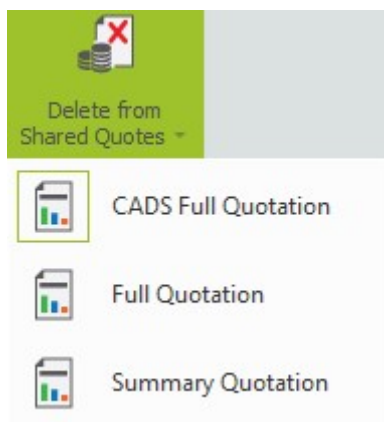


You can check that you have successfully created a copy. Simply select the **Save to My Quotes** (or **Save to Shared Quotes**) button again and you can see a new quote with the name that you selected.

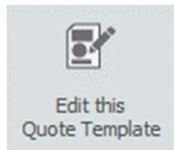


Also if you select the **Delete from My Quotes** (or **Delete from Shared Quotes**) button, you will also see the Quote that you have created. At this point you can delete unwanted quote templates.

It might be helpful to keep the original “Full Quotation” until you are finished with your new quote.

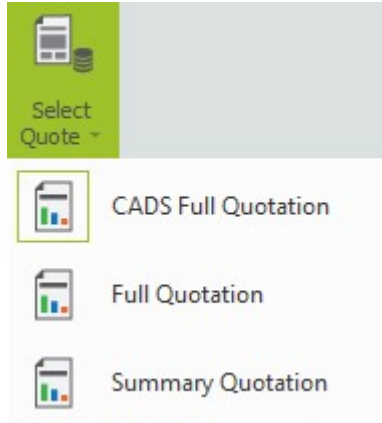


To finish copying, close the **Edit this Quote Template** command by clicking the button again.



Next you are going to select your new template so you can change it.

If you now pick **Select Quote**, you can see the quote templates available for use.



Select the template you created from the list. In this example, it is called "CADS Full Quotation".

Please note that you should save regularly whilst creating your template.

If you make a mistake it is often easier to close the **Edit this Quote Template** and start again with the particular step that you were attempting.

Adding headers and footers to your template

When you first open the quote in the **Edit Quote Template** command you will notice that it has generic text, logos, headers and footers.



Customer:
[CUSTOMER CONTACT
FORENAME] [CUSTOMER
CONTACT SURNAME]
[CUSTOMER ADDRESS]

Site:
[SITE ADDRESS]

**FC
S**
Your logo
here
[MY ADDRESS]
[MY TELEPHONE]
www.example.co.uk

Date 15/06/2015
Contract Number 0001
Description

Dear Mr ,

Thank you for your valued enquiry. We are pleased to submit this quotation for the scaffolding that you have requested.

The total price for the scaffolding in this quotation will be £256.00 including 4 weeks hire per item as described in the enclosed breakdown. After this period the total additional hire charge will be £134.00 per week or part thereof. All prices exclude tax.

Please do not hesitate to contact us if you require further assistance.

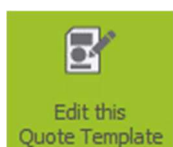
Yours faithfully,

The first step is to edit the header of the covering letter.

If you would like to add a logo to your header or footer please ensure that you know its location on your hard disk. The following file formats are supported:

- BMP Bitmap
- JPG JPEG
- PNG Portable Network Graphics
- GIF Graphics Interchange
- TIF Tagged Image File
- EMF Microsoft Enhanced Metafile
- WMF Windows Metafile

Now in **Quote IT** select the **Edit This Quote Template** button.



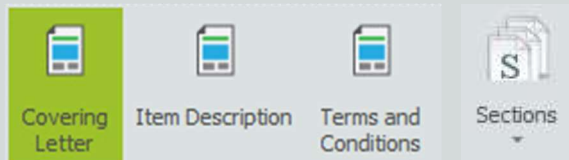
Please Note: If you **DO NOT** select the **Edit This Quote Template** button any changes that you make will only affect the current project. It will not be possible to save the changes you have made for future projects.

Select the covering letter

Navigating a quotation

Every quote is divided into one or more sections. A section might appear only once, or it might be repeated for every item in the project.

The active quote section is shown as the document in the middle of the screen.

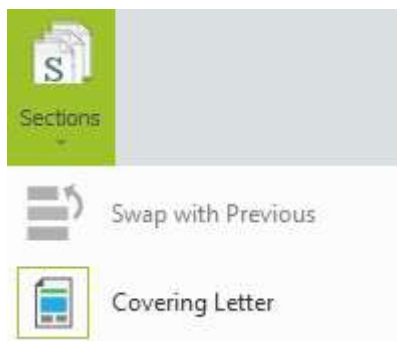


If the quotation has three or less sections, a button is shown for each.

If there are four or more, a single menu is shown instead.

You can show different sections by selecting them from the toolbar.

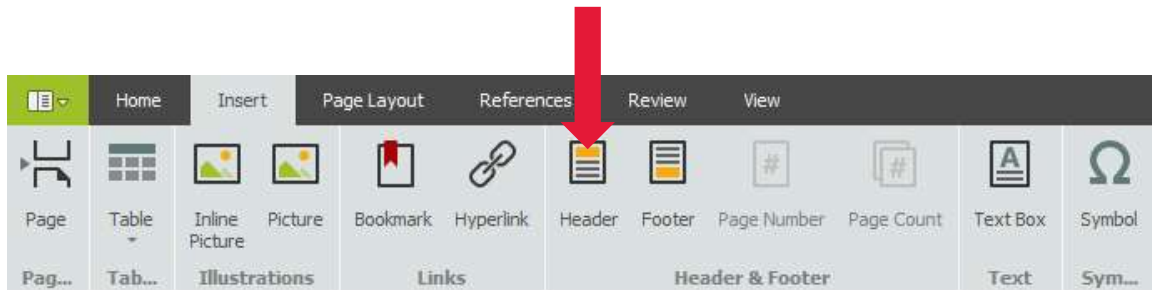
Make sure that the **Covering Letter** section is selected, it will be highlighted as shown below.



Select the header

To activate the header area of the template double click with your left mouse button in the area above the customer address field. You will know that the header area is active as the text becomes darker and the header tab is visible.

You can also use the **Insert > Header** button to select the header.



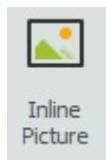
Replace the company logo

Select the default logo image (which includes the text “Your logo here”).

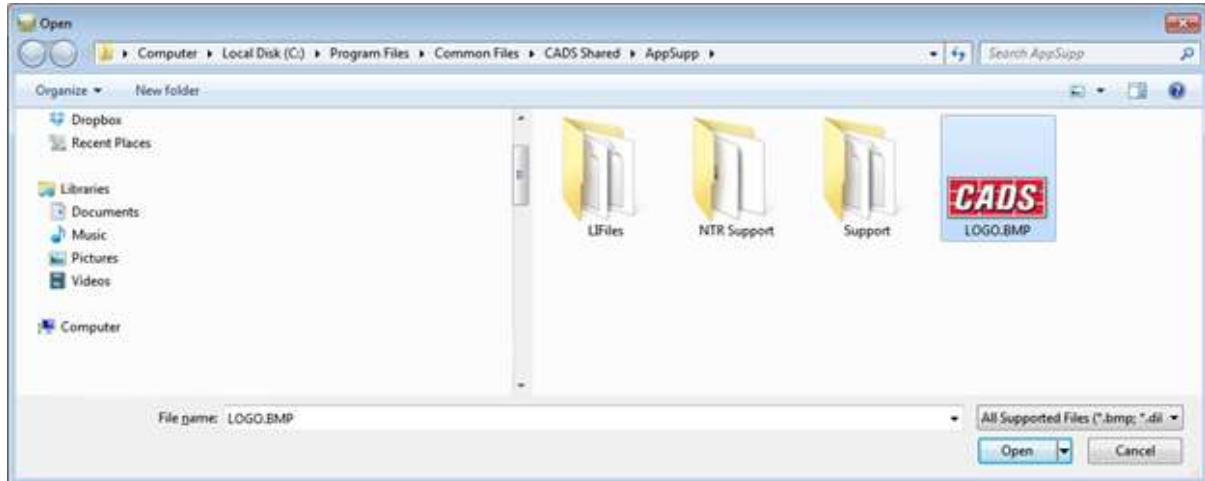


Press the *Delete* key to remove it.

Click on the **Inline Picture** button on the **Insert** Tab of the **Text Editing Toolbar**.



Browse to the folder where your logo file is located, select it and click **Open**.



The logo will be inserted in the header area but it may not be the correct size.



Left click on your new logo.

To resize the logo, left mouse click on the resize circle on the bottom right of the logo. Move the mouse to the right to resize the logo to fit into the header area. If you hold the *Ctrl* key down on the keyboard whilst you are resizing this will maintain the logo's aspect ratio and prevents the logo stretching unevenly.



This ends the section on adding your company logo to the header.

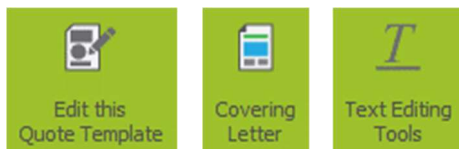
Adding the footer logos

You may wish to add industry compliant logos to your footer as well as your company registration number etc.

In this example we are going to add logos and text.

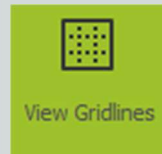
Scroll down to the bottom of the Covering Page, double left mouse click in the Footer area.

The **Edit this Quote Template**, **Covering Letter** and **Text Editing Tools** buttons should still be selected.



Adding space for more logos

The default footer includes a table with some text and a logo in it. To see the gridlines of the table, select the *View Gridlines* button from the **Table Tools > Layout** tab on the **text editing toolbar**:



The right column is only large enough for one image.

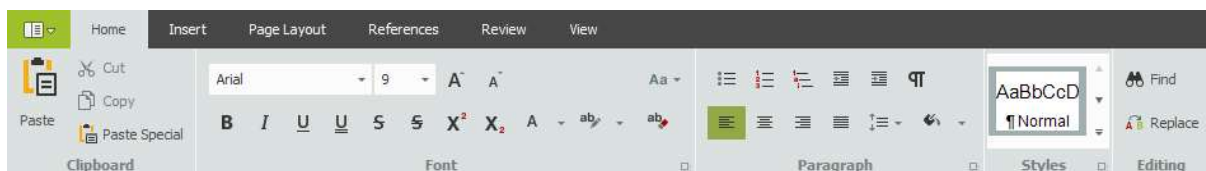


To increase the size of the right column, grab the column grip and drag it to the left.



Next, replace the “Your slogan here...” text with whatever text you prefer. Perhaps type in your email and company registration number, or your company slogan.

The **Home** Tab on the **text editing toolbar** has options for setting the text font, height, colour etc.



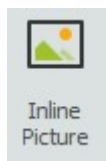
Now you are going to insert your industry logos. These can be inserted and resized individually to meet your requirements. Remember when resizing the logo, hold the *Ctrl* key down on the keyboard to maintain the logo’s aspect ratio (to keep it the same height to width ratio).



To add the first logo, select the existing “Your associations here” logo and press the **Delete** key to remove it.



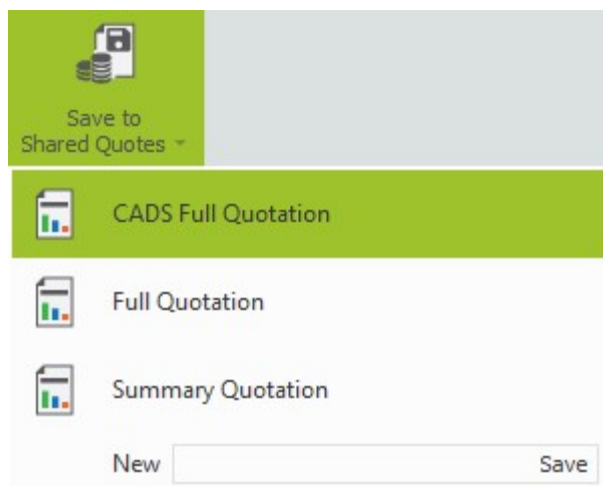
Select the **Insert** Tab on the **Text Editing Toolbar** and click on **Inline Picture**.



Browse to the folder where your footer logos are located, click on the logo and select **Open**. The logo will be inserted in the footer area but it may not be in the correct position or be the correct size.

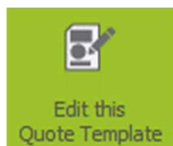
Select the logo with the left mouse button, resize and move as required (as described in the **Adding your company logo to the header** section, above).

Once this has been completed, save your template. In this example the template is called “CADS Full Quotation”.



Make sure that you save first before previewing the quote!

To make sure that this now prints as desired, first deselect the **Edit this Quote Template** button.



Now select the **Print Preview** button.



You can now see the changes that we have made, as they will appear on the printout.

	Customer:	Site:	
	Date	15/06/2015	www.example.co.uk
	Contract Number	0001	
	Description		
Dear Mr , Thank you for your valued enquiry. We are pleased to submit this quotation for the scaffolding that you have requested. The total price for the scaffolding in this quotation will be £256.00 including 4 weeks hire per item as described in the enclosed breakdown. After this period the total additional hire charge will be £134.00 per week or part thereof. All prices exclude tax. Please do not hesitate to contact us if you require further assistance. Yours faithfully, 			
Estimator			
Powered by SMART Scaffolder		POWERED BY 	

Click the **Print Preview** button again to close.



Repeating a header on every page

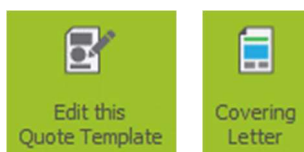
To repeat a header on every page, copy the header from the **Covering Letter** section to each of the other sections.

Don't forget to use **Edit this quote template** mode on each section, and to save your changes.

Set your signature graphic

You can add a digital signature to your covering letter template and type in the estimator's name. You will first need to scan and save your signature to your hard disk. The same graphical file formats apply as in the header and footers above.

To do this, make sure you have selected the **Covering Letter** and **Edit this Quote Template** buttons.

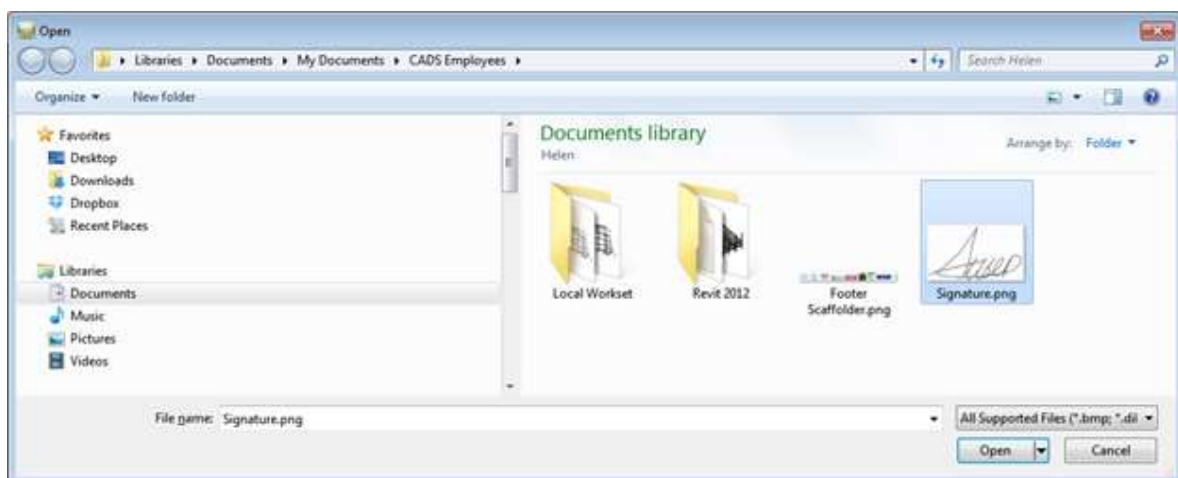


Click on the signature image below "Yours Faithfully,"

Yours faithfully,

MySignature

In the Explorer Window browse to the folder where your logo file is located, select it and click **Open**.



The signature image is inserted into the quotation. This graphic will be used for all future quotes you print.

This concludes the section on setting a signature for your quote.

Changing text within the covering letter

You have changed the header, footer and signature on your covering letter. Now let's take a look at changing the text in the main body of the letter.

Dear Mr ,

Thank you for your valued enquiry. We are pleased to submit this quotation for the scaffolding that you have requested.

The total price for the scaffolding in this quotation will be £256.00 including 4 weeks hire per item as described in the enclosed breakdown. After this period the total additional hire charge will be £134.00 per week or part thereof. All prices exclude tax.

Please do not hesitate to contact us if you require further assistance.

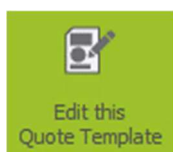
Yours faithfully,

[MY CONTACT FORENAME] [MY CONTACT SURNAME]



Estimator

As you can see the letter is in its standard "out of the box" format. Before we can change the text we need to be back in the editing mode. To do this, select the **Edit this Quote Template** button.



For this example we are only going to show the total price of the contract and not the weekly hire or extra hire fees.

To do this, highlight the sections to be removed and hit the **Delete** key on the keyboard.

Dear <<CustomerContactName>>,

Thank you for your valued enquiry. We are pleased to submit this quotation for the scaffolding that you have requested.

The total price for the scaffolding in this quotation will be <<ContractTenderedPrice>> including <<ContractLongestHirePeriod>> hire per item as described in the enclosed breakdown. After this period the total additional hire charge will be <<ContractTotalExtraHire>> per week or part thereof. <<TaxText>>

Please do not hesitate to contact us if you require further assistance.

Yours faithfully,

Repeat this to remove all the unwanted wording.

Dear <<CustomerContactName>>,

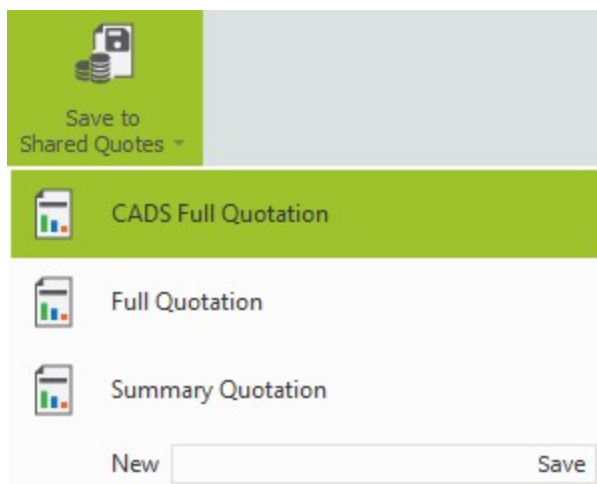
Thank you for your valued enquiry. We are pleased to submit this quotation for the scaffolding that you have requested.

The total price for the scaffolding in this quotation will be <<ContractTenderedPrice>> as described in the enclosed breakdown. After this period the total additional hire charge will be <<ContractTotalExtraHire>> per week or part thereof. <<TaxText>>

Please do not hesitate to contact us if you require further assistance.

Yours faithfully,

Now save your updated quote template.

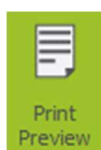


Save to Shared Quotes ▾

-  CADS Full Quotation
-  Full Quotation
-  Summary Quotation

New Save

Press the **Print Preview** button.



And now you will see your updated covering letter.

Dear Mr ,

Thank you for your valued enquiry. We are pleased to submit this quotation for the scaffolding that you have requested.

The total price for the scaffolding in this quotation will be £256.00 as described in the enclosed breakdown. All prices exclude tax.

Please do not hesitate to contact us if you require further assistance.

Yours faithfully,

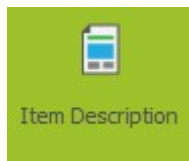
Changing text within the item description

Within our example, we are going to add a new paragraph entitled “Discount”. This will show how much discount has been applied to the price.

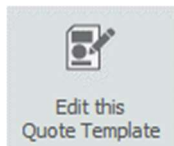
To do this close your print preview from before, by deselecting the **Print Preview** button.



Change to the **Item Description** Section.



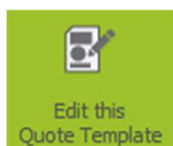
Now make sure the **Edit this Quote Template** button is deselected.



You can now see how the items will look in the quotation.

Item No: 1 of 1	Item Name: Item 1	Quantity: 1	
Independent scaffold erected in one operation and dismantled in one operation.			
The scaffolding will be built to the following dimensions:			
	Length	Width	Lift Count
Shop front independent			
Elevation 1	10.00 m	1.27 m	2 lifts
Elevation 2 - Bridging front entrance	10.00 m	1.27 m	2 lifts
Elevation 3	10.00 m	1.27 m	2 lifts
The scaffolding will have a lift height of 2.00 m.			
The scaffolding will be built with double guard rails at all lifts.			
Decking			
Main Deck: 5 Boards, Toe Boards: 1.			
Decking will be placed once only by us at all lifts.			
Steel toe boards will be provided on all decked lifts.			
Access			
All listed independents will include 1 ladder access built from the ground.			
Loading			
The scaffolding will be constructed on a nominal 2.44m by 1.27m grid.			
The scaffolding will support a maximum of 1 lift with a uniformly distributed load of 2.00 kN/m ² and 1 lift with a uniformly distributed load of 1.00 kN/m ² . These loads must not be exceeded.			
Price			
Item Price		£1,522.00	
Hire Period (in weeks)		up to 4 weeks	
Extra Hire (per week or part thereof)		£485.00	
All prices exclude tax.			

Select the **Edit this Quote Template** button to change back to the template view.



Normal Text versus SMARTText

There are two types of text:

- ▶ Normal Text

Most of the document is made up of normal text. To change this text, simply select it and type to replace it.

- ▶ SMARTText

Some of the document is made up of SMARTText. SMARTText is created by taking information from the *project browser* and other parts of the software. These chunks of text will automatically update to match the rest of the software.

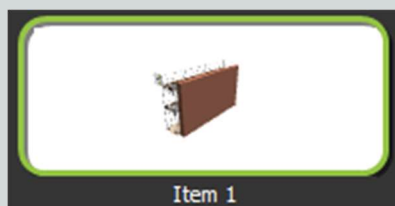
For example, if you add an item to the project, SMARTText for the new item will be created.

Types of SMARTText

There are two types of SMARTText:

- ▶ Item SMARTText

Item SMARTText shows information about a specific item in the project. For instance, it might show the item's name, or some information about the pricing for that one item.



- ▶ Other SMARTText

Other SMARTText includes any information which is not specific to a single item. For example, the *Contract Number* as shown in the **Project Browser**.

You can now see how the item breakdown is split up using **Normal text** and **SMARTText**.

Normal Text

Item No: <<ItemNo>> of
<<NoSeparateItemsInContract>>
>

Item Name: <<ItemName>>

Quantity: <<ItemQuantity>>

<<IsPhysicallyTied>> <<Systems>> scaffolding to give access.
<<ProgressiveDescription>> <<AdaptionDescription>> <<AddOnsDescription>>

The scaffolding will be built to the following dimensions:

<<ScaffoldDimensions>>
<<LiftHeightDescription>>
<<GuardrailsDescription>>

Decking
<<DecksDescription>>

SMARTText

Item No: <<ItemNo>> of
<<NoSeparateItemsInContract>>
>

Item Name: <<ItemName>>

Quantity: <<ItemQuantity>>

<<IsPhysicallyTied>> <<Systems>> scaffolding to give access.
<<ProgressiveDescription>> <<AdaptionDescription>> <<AddOnsDescription>>

The scaffolding will be built to the following dimensions:

<<ScaffoldDimensions>>
<<LiftHeightDescription>>
<<GuardrailsDescription>>

Decking
<<DecksDescription>>

We want to add an extra paragraph to the quote comprising of a “Discount” header text and some text showing how much discount has been applied.

For this example you need to select a new row at the end of the *item description*.

Price	
Item Price	<<TenderedPrice>>
Hire Period (in weeks)	up to <<HirePeriod>>
Extra Hire (per week or part thereof)	<<TotalExtraHire>>
	<<TaxText>>
<<Clauses>>	

With the **text editing toolbar**, set your text to Arial, the size to 11, and make it **bold**.



Now enter your new header, **Discount**.

Price	
Item Price	<<TenderedPrice>>
Hire Period (in weeks)	up to <<HirePeriod>>
Extra Hire (per week or part thereof)	<<TotalExtraHire>>
	<<TaxText>>

Discount

<<Clauses>>

Press Enter to move to the next line. (This way our next changes do not effect the “Discount” line.)

Deselect the **Bold** text button.



At the top of your screen next to the **Text Editing Tools** button, you will see another button called **Insert SMARTText**.



Here you can see the two types of *SMARTText*:



There is **Project SMARTText**. This is SMARTText which is not specifically related to any item.

There is also **Item SMARTText**. This holds information which changes as you make changes to a project item.

To add the “Discount Details” we will be using a combination of **Normal text** and **Item SMARTText**.

So type the following line of text using Normal text, beneath the heading “Discount”:

“A discount of”

Price	
Item Price	<<TenderedPrice>>
Hire Period (in weeks)	up to <<HirePeriod>>
Extra Hire (per week or part thereof)	<<TotalExtraHire>>
	<<TaxText>>

Discount

A discount of |

<<Clauses>>

Now using **Insert Item SMARTText**, add in the **Discount Total**.



Insert SMARTText ~

P Insert Project SMARTText ▶

I Insert Item SMARTText ▶

General ▶

Pricing ▶

Description ▶

Profit Total

Material Mark-Up Total

Profit Margin Total

Discount Total

Pre-Tax Unit Tendered Price

Pre-Tax Tendered Price

Pre-MCD Tendered Price

Price	
Item Price	<<TenderedPrice>>
Hire Period (in weeks)	up to <<HirePeriod>>
Extra Hire (per week or part thereof)	<<TotalExtraHire>>
	<<TaxText>>

Discount

A discount of <<Discount>>|

<<Clauses>>

And finally add “ has already been applied to this price.” to the end of the line in Normal text.

Price

Item Price	<<TenderedPrice>>
Hire Period (in weeks)	up to <<HirePeriod>>
Extra Hire (per week or part thereof)	<<TotalExtraHire>>
	<<TaxText>>

Discount

A discount of <<Discount>> has already been applied to this price.

<<Clauses>>

Now save your updated quote template.

Save to Shared Quotes

CADS Full Quotation

Full Quotation

Summary Quotation

New Save

Then deselect the **Edit this Quote Template** button.

Edit this Quote Template

You can see how this new text displays with the *SMARTText*.

Price

Item Price	£2,528.00
Hire Period (in weeks)	up to 4 weeks
Extra Hire (per week or part thereof)	£1,139.00
	All prices exclude tax.

Discount

A discount of £229.74 has already been applied to this price.

Changing the active item

The document only shows item specific SMARTText for the active item. You can change the active item in the **Project Browser** by clicking on an item.



Here, *Item 2* is active. (It is outlined in green).

I can activate *Item 1* instead by clicking on it.

When you change the active item, any item-specific information will change to match.

In fact, every version of this section document is different. If you make changes while *Item 1* is active, it will not affect the document which is shown for *Item 2*. If you want to make changes which affect the document for every item in the project, see the **Edit a Section Template** section.



Please note, any changes that you make to a specific item cannot be saved and used for future projects.

Future projects will not contain this specific item (even if they have a similar one), so any changes you make here will only affect this section document, in this project.



It is a good idea to change the Section Templates before you make any item-specific changes. To find out how, see the **Edit a Section Template** section below.

Adding and removing sections

If you don't want to keep the default sections in your quote, or if you want to add new sections to your quote, you can do this by using the **Add Section** and **Delete Section** buttons.



Add a new section

Before clearing out all of the sections that you don't want, you need to create at least one new section.

To do this, click on the **Add Section** ("S+") button in the **Sections** part of the toolbar.



You will be prompted to give the section a name. Choose one and type it in.

Why not delete the sections that I don't want first?

A Quote template cannot have less than one section. If you want to delete all of the sections in a template, you need to add at least one replacement first.

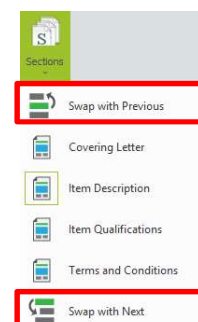
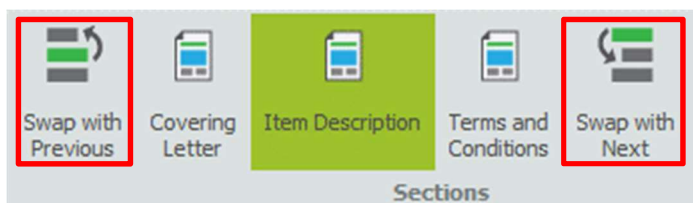
Delete any sections that you don't want

Any sections that are not required can be erased by selecting them from the **Delete Section** drop-down.



When you have only one section left, this button will disappear, because every quote must have at least one section. (To delete the last section, you must first add a replacement. See **Add a new Section**, above.)

Change the order of sections



Press the **Swap with Previous** or **Swap with Next** buttons to change the position of the active section.

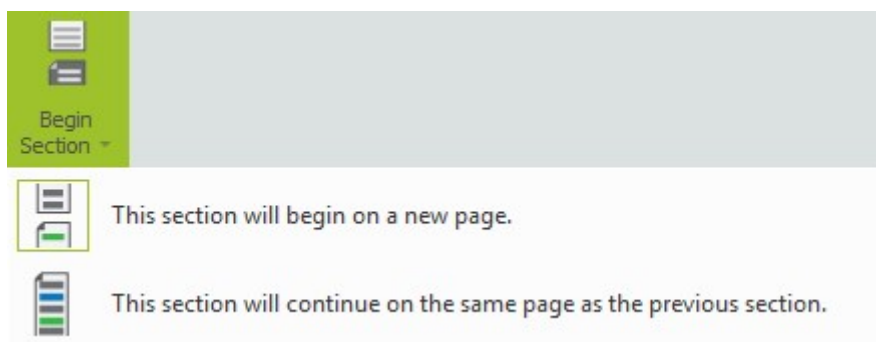
Section configuration

The **Begin Section** and **Repeat Section** buttons are used to set whether this section is printed on a new page or not.



Begin section

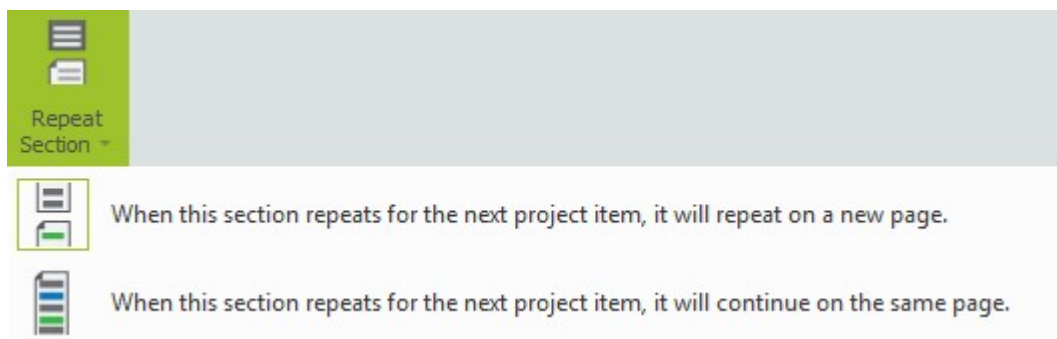
This option affects every section after the first (i.e. “Covering Letter”). If the first option is set, this section will start on a new page. If the second option is set, this section will continue on the same page as the section before it.



Repeat section

This option only affects sections which have item specific information in. For us, that means it only affects the *Item Description* section. In the **Print Preview**, such sections repeat once for every item in the project.

If the first option is set, every repeat will start on a new page. If the second option is set, every repeat will continue on the same page.

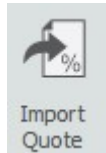


Import or export a quote template

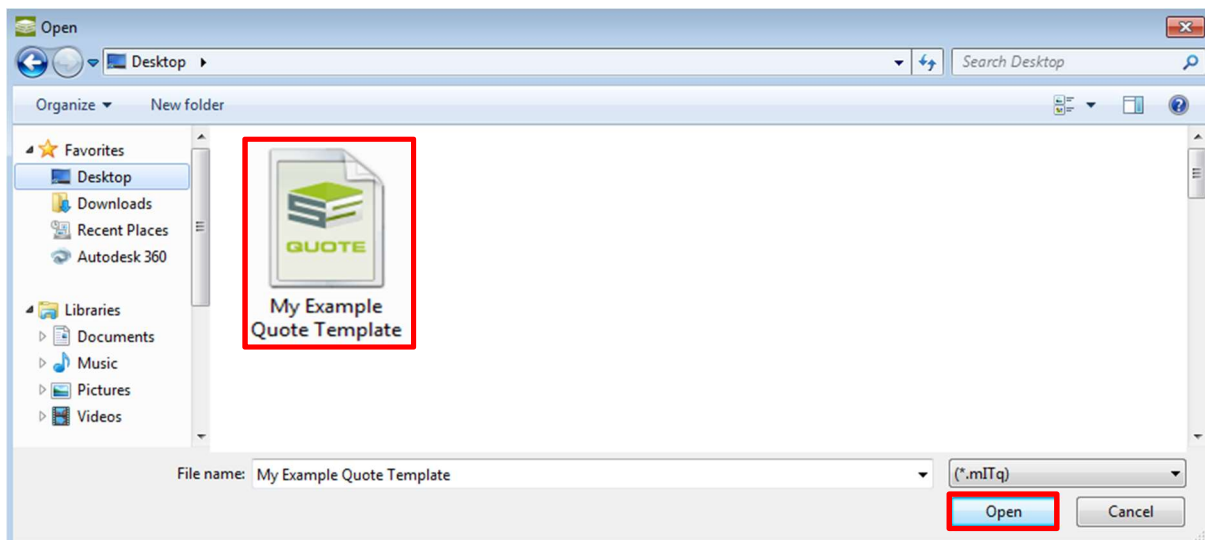
How to import a quotation template

If you have been provided with a quotation template (.mITq) file by CADS or a colleague, you can easily import it into SMART Estimator. If you received the file via email, please save it to a convenient location. Make sure you know how to find it.

Press the **Import Quote** button.



Select the quotation template file and select **Open**.

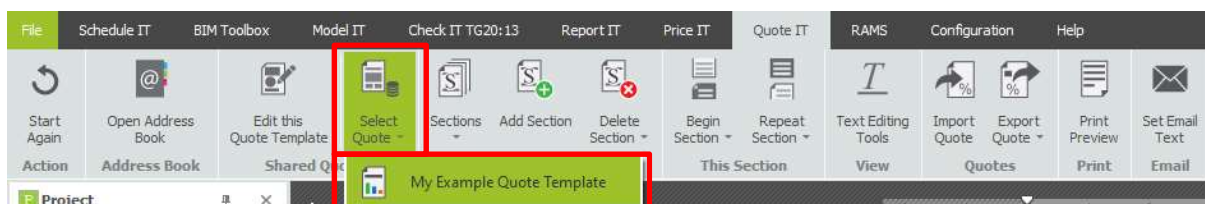


If you receive the following message, select **Yes**.



You have now successfully imported the quotation template file.

To switch to your new quotation template simply select it from the **Select Quote** menu.

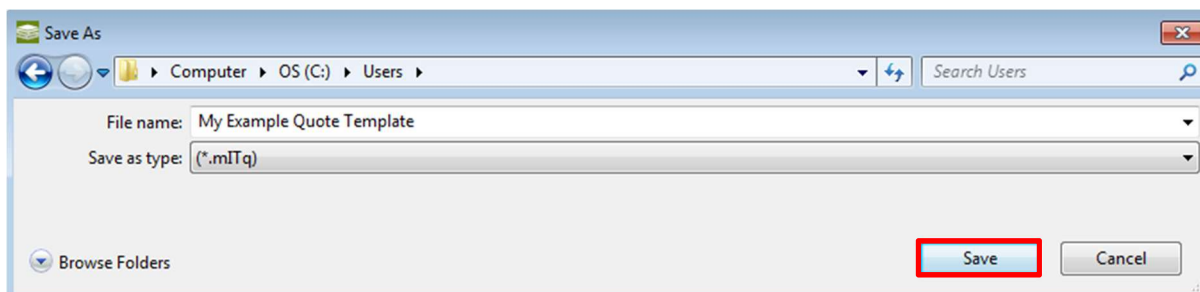


How to export a quotation template

To export a quotation template, so you can share it as a file, select your quote from the **Export Quote** menu.



You can now choose a suitably convenient place to save the exported quotation template.



Remember where you saved your template.

The exported quotation template file can now be easily transferred to another user or workstation via email or file transfer.

If you are using the **SMART Estimator Enterprise** module, your quote templates will automatically be available to everyone connected to your server, so there is no need to export your template.

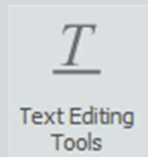
Edit a single quotation

When you have customised your quotation template, SMART Estimator will automatically set the majority of the quotation text correctly for you. However, you may wish to change the text for a single quote to account for special conditions or extra descriptions.

Editing tools

It is possible to edit the document without using text editing tool buttons. For example, if you highlight some of the text and press the *Ctrl* and the *B* key together, the text will become bold.

However, it is much easier to make changes to the document using the text editing tools. To show these tools, select the **Text Editing Tools** button in the main toolbar.



You will notice that some new buttons appear in the main toolbar. Also, a new toolbar appears above the section document.

Editing the quotation text

Most text of the quotation can be typed over as you would in any other word processor. Some special **SMARTText** is created automatically by SMART Estimator. There are a few ways for you to change the wording of a block of SMARTText.

Editing SMARTText

There are two types of SMARTText:

- ▶ Editable SMARTText
- ▶ Non-editable SMARTText

Editable SMARTText

Some SMARTText can be edited using special tools. To access these tools, select one piece of SMARTText. The easiest way to do this is by just clicking on it once. The whole of the SMARTText will be selected. If you select more than a single piece of SMARTText, (even if you have only selected the text and an extra space), the tools will not appear.

For example, clicking on the *Scaffold Dimensions* SMARTText reveals this:

	Length	Width	Lift Count
Independent 1			
Front elevation	10.00 m	5 boards	2 lifts
Right elevation	10.00 m		
Rear elevation	10.00 m		
Left elevation	10.00 m		

Columns

☒ Width

☐ Elevation Height

☒ Lift Count

Colours

Even row colour :

Odd row colour :



Try it!

Select the **Include Elevation Height** checkbox and press the green tick to add some extra detail to your quotation.

Non-editable SMARTText

Most SMARTText is not editable. This can only be changed by erasing it and typing some other text, or by “exploding” it. See the next section for details.

Exploding SMARTText

All SMARTText includes an option to convert it to basic text. Click on the SMARTText to show the **Convert to basic text** button:

All prices exclude tax.



Convert to Basic Text



Make this SMARTText editable. Basic text does not update itself automatically.

Changing SMARTText into basic text means that changes made in other parts of the software will no longer affect this text.

For example, if I delete the *item tendered price* SMARTText and replaced it with “£1000”, any changes that I make to the item’s pricing will not change the £1000 value. The text is now fixed to “£1000” unless I type over it again.

Edit the clauses and conditions

A list of clauses (sometimes known as conditions or qualifications) can be added to every quote. It is also possible to set clauses for individual items within the quotation.

Clauses are specific blocks of text that are placed automatically within the quote, which can be easily added or removed:

CLAUSES

The following clauses apply:

1. Issues Arising From Scaffolding Works

1.1. You are responsible for the making good / repair of any damage caused by the erection, alteration and / or dismantling of scaffolds on existing roofs.

1.2. Scaffolds will be tied to the structure with 'through ties' as required by the relevant Regulations and Codes of Practice. You are responsible for obtaining permission to use such ties. You are also responsible for ensuring the necessary openings are provided and for weatherproofing the building after the ties have been fixed. Making good of any damage caused by the use of 'through ties' will be your responsibility and at your cost.

There are a set of tools available to make adding and removing clauses from the quotation as easy as possible. To access these tools, simply click on the **Clauses** SMARTText or on the **Terms and Conditions** SMARTText. A box will appear with some tools:

Item 1 Clauses

 All Clauses

 Clauses Selected for this Item

 Recommended Clauses

 Import from Smart Scaffolder UK

 Save these Settings to All Templates

 Advanced Settings

Show

Import Clauses

Save

Advan...

Select	Group	Name	Description
→ Group: Issues Arising From Scaffolding Works			
☐	Issues ...	Making good: erect / dismantle	You are responsible for the making good / repair of any damage ca...
☐	Issues ...	Through ties	Scaffolds will be tied to the structure with 'through ties' as required...
☐	Issues ...	Drilled anchors	Scaffolds will be tied to the structure using drop-in expanding anch...
☐	Issues ...	Suitable building	You are responsible for ensuring that the fabric of the building is su...

Add New Clause

Select	Group	Name	Description
→	☐		

Add

Clauses versus conditions

SMART Estimator **Quote IT** differentiates between “clauses” and “conditions”.

► **Clauses**

Clauses are associated with a single item in the project. They may be different for every project item. Clauses appear in the **Clauses** SMARTText.

► **Conditions**

Conditions added to the project itself. These are usually standard blocks of text which are added to every quotation. Conditions appear in the **Terms and Conditions** SMARTText.

Add or remove a clause from the quotation

To add a clause to the quotation, simply check the **Select** box for that clause:

Select	Group	Name
▼ Group: Issues Arising From Scaffolding Works		
☒	Issues Arising From Scaffolding Works	Making good: erect / dismantle
☒	Issues Arising From Scaffolding Works	Through ties
☒	Issues Arising From Scaffolding Works	Drilled anchors
☒	Issues Arising From Scaffolding Works	Suitable building

Check the **select** box to add a clause to the quotation.

To remove a clause, simply deselect the box.

Note: To save changes to the **Select** column for:

- this project, use the green tick (**Accept and Close**) button;
- future projects, please see the **Change the advanced clause settings** section instead.

The clause **Name** is provided to make clauses easier to locate in the list. The name does not appear in the quotation.



Personalising the clause **Names** can make it easier to find clauses in the future.

Save your changes by pressing the **Save these Settings to All Templates** button. This will store your changes for future projects. If this button is hidden, press the **All Clauses** or **All Conditions** button to show it.

Note: This does **NOT** save changes to the **Select** column.

Edit clause text

To change the text which appears in the quotation for a clause, change the **Description** text:

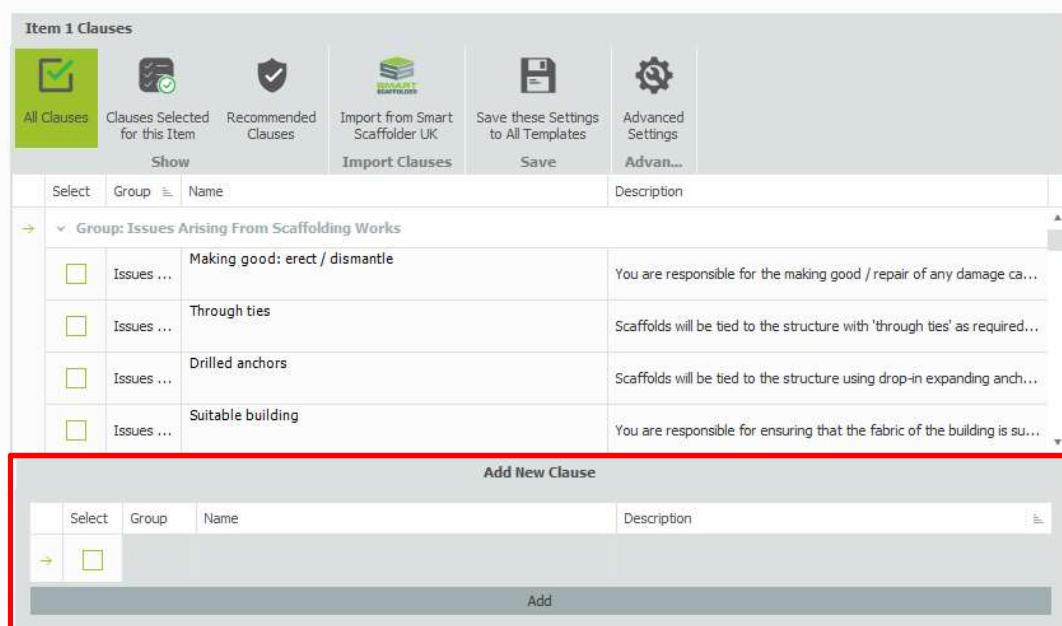
Name	Description
Making good: erect / dismantle	You are responsible for the making good / repair of any damage caused by the erection, alteration and / or dismantling of ...
Through ties	Scaffolds will be tied to the structure with 'through ties' as required by the relevant Regulations and Codes of Practice. Yo...
Drilled anchors	Scaffolds will be tied to the structure using drop-in expanding anchors secured in holes drilled into the fabric of the building...
Suitable building	You are responsible for ensuring that the fabric of the building is suitable and strong enough to withstand the loads impose...

Edit a clause **Description** to change the text which appears in the quotation when this clause is selected.

Save your changes by pressing the **Save these Settings to All Templates** button. This will store your changes for future projects. If this button is hidden, press the **All Clauses** or **All Conditions** button to show it.

Add a clause to the list

At the bottom of the **Project Conditions** configuration page there is a section named **Add to Group**.



The screenshot shows the 'Item 1 Clauses' configuration page. At the bottom, the 'Add New Clause' section is highlighted with a red box. It contains a table with columns: Select, Group, Name, and Description. The 'Select' column has a checkbox and a right-pointing arrow. The 'Group' column is currently empty. The 'Name' and 'Description' columns are also empty. Below the table is an 'Add' button.

Within the **Add New Clause** section, click your mouse in the second column from the left, named **Add to Group**.



IMPORTANT: If you are adding new conditions to an existing group you must type the **exact** name of the group into this box. If you type something different, the **Project Conditions** tool will automatically create a new group with the name that you entered.

Now click in the next column on the right. In this box you can enter a **Name** for your clause, to make it easier to find.

Select	Group	Name
☒	Issues Arising From Scaffolding Works	

Add

Press the **Tab** key again on your keyboard, this will move your cursor across to the next column on the right. In this box you can enter a **Description**. This is the text which will appear on the quote.

Select	Group	Name	Description
☒	Issues Arising From Scaffolding Works	Damage from neighbouring sites	

Add

Rich text editor toolbar: Arial, 11, Bold, Italic, Underline, Link, Unlink, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo.

Text area for description.

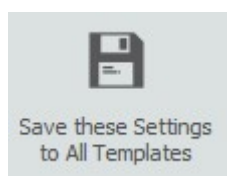
Rich text editor toolbar: Arial, 11, Bold, Italic, Underline, Link, Unlink, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo.

Large text area for description.

Press the **Add** button to add this clause to your list.

Add

This clause is now available for this quotation only. To make it available for future projects, select the **Save these Settings to All Templates** button.



Change the clauses view

There are three viewing options for clauses:

- ▶ All Clauses (or All Conditions)
- ▶ Clauses Selected for this Item (or Conditions Selected for this Project)
- ▶ Recommended Clauses (or Recommended Conditions)

All Clauses is the basic view, showing every clause, whether it is selected or not.

Clauses Selected for this item will only show clauses which have been selected, so they will appear in the quotation.

Recommended Clauses is empty by default. It includes clauses which SMART Estimator **Quote IT** does not automatically select for you, but which are marked as recommended for a particular item or project.

Save changes to the clauses

You can save your changes to the clause names, description and advanced settings (see below) by pressing the **Save these Settings to All Templates** button. To change only the clause selection, choose the **Accept and Close** button instead:

Save these changes to All Templates stores the text changes to individual clauses.



Save these Settings
to All Templates

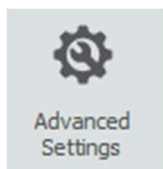
Accept and Close applies the clauses you selected.



Change the advanced clause settings

SMART Estimator **Quote IT** provides some powerful tools for automatically adding and recommending clauses and conditions for every project.

To access these settings, press the **Advanced Settings** button.

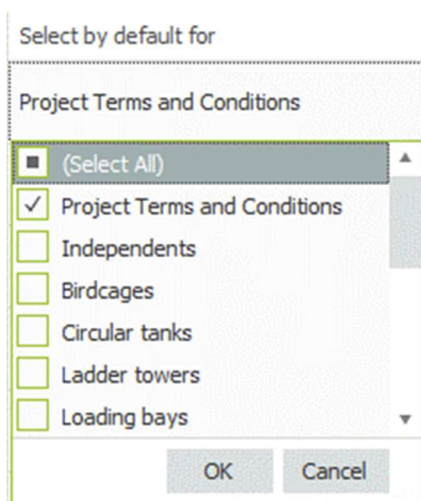


When you do this, three new columns are added: **Select by default for**, **Recommend for** and **Erase**.

Set a clause to be selected automatically

There will usually be some clauses that you always add for every project. You may have some clauses which you always add for a particular type of scaffold. For example, if a loading bay is in use, you might add a clause describing responsibility for the foundations.

You can use the **Select by default for** options to tell SMART Estimator **Quote IT** when to select a clause for you automatically.



For future projects:

- ▶ If the **Project Terms and Conditions** option is selected, this condition will be automatically selected and shown in the **Terms and Conditions** SMARTText.
- ▶ If a scaffold type is selected, this clause will be automatically selected and shown in the **Clauses** SMARTText, for items which include the selected scaffold type.

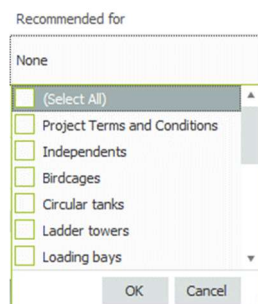
For example, if **Independents** is selected, this clause will be shown automatically for any item which includes independent scaffolds.

- ▶ If **Manual** is selected, this clause will be automatically selected and shown in the **Clauses** SMARTText, for items which include manual scaffolds and also for empty items.

Set clause recommendations

Some clauses are not useful for every project, but should be considered every time. For example, if you have a clause related to winter designs, you would only want to include this for scaffolds which will be in place over the winter period.

You can use the **Recommended for** options to tell SMART Estimator **Quote IT** when to recommend a clause, rather than automatically selecting it for you.



For future projects:

- ▶ If the **Project Terms and Conditions** option is selected, this condition will appear when the **Recommended Conditions** view is shown on the **Terms and Conditions** SMARTText.
- ▶ If a scaffold type is selected, this clause appears when the **Recommended Clauses** view is shown on the **Clauses** SMARTText, for items which include the selected scaffold type.

For example, if **Independents** is selected, this clause appears when the **Recommended Clauses** view is shown on the **Clauses** SMARTText for any item which includes independent scaffolds.

- ▶ If **Manual** is selected, this clause appears when the **Recommended Clauses** view is shown on the **Clauses** SMARTText, for items which include manual scaffolds and also for empty items.

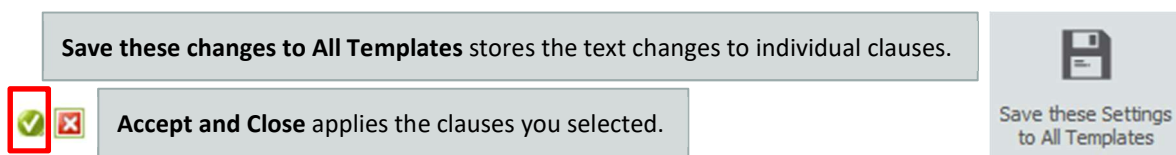
For details on how to show the **Recommended Clauses** and **Recommended Conditions** views, please see the **Change the clauses view** section above.

Erase a clause

To remove a clause from the list, select the **X** button in the **Erase** column for that clause.

Save changes to the clauses

You can save your changes to the clause names, description and advanced settings (see above) by pressing the **Save these Settings to All Templates** button. If you have changed the clauses selected for this quotation, choose the **Accept and Close** button as well:



If you don't save these changes, the advanced settings will not be used for future projects.

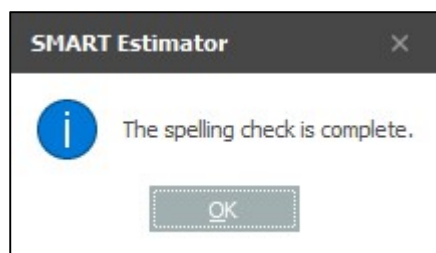
Check your spelling

SMART Estimator will automatically check your spelling against a UK English dictionary. Many scaffolding system names and common scaffolding terms are already included in this dictionary.

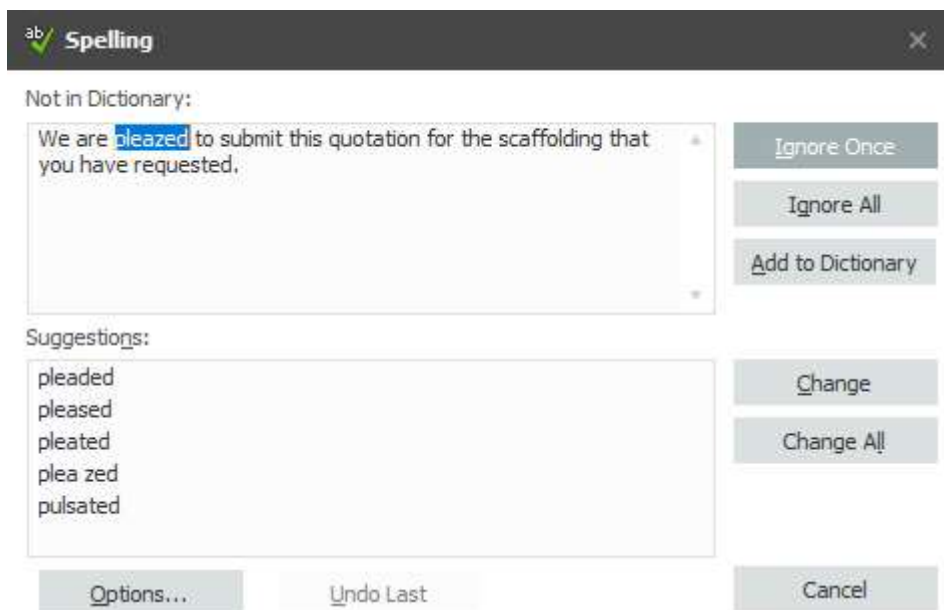
To manually check your spelling, select the text you want to check, then Click on the **Spelling** button on the **Review** Tab of the **Text Editing Toolbar**.



If there are no errors, a message will appear:



Otherwise, a spell checker will appear:



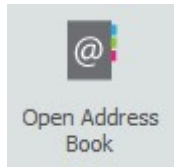
To add a word to your dictionary, so it is no longer highlighted as an error, click **Add to Dictionary**. Note that this will only add the word for you. Any of your colleagues that use the same SMART Estimator Server as you will not be affected.

Address books

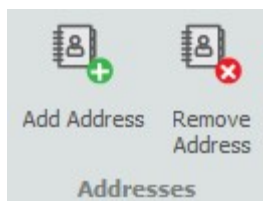
There are four types of addresses within **Quote IT**. The customer address, the site address, your own address and the address of your yard.

Customer addresses

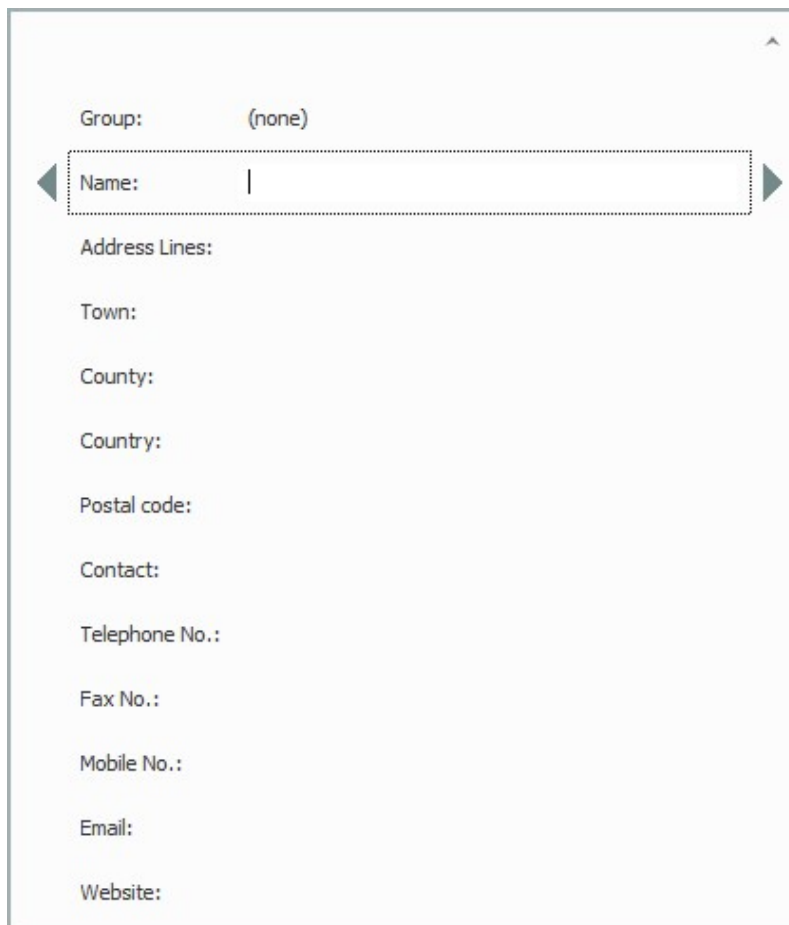
To add a customer you can simply select the **Open Address Book** button.



And then to add an address select the **Add Address** button.



You now get a new contact card to fill in.

A contact card form with a light grey background. It contains the following fields: 'Group:' with '(none)' selected, 'Name:' with a text input field, 'Address Lines:', 'Town:', 'County:', 'Country:', 'Postal code:', 'Contact:', 'Telephone No.:', 'Fax No.:', 'Mobile No.:', 'Email:', and 'Website:'.

Fill in the missing blanks for the customer.

Marsden housing

Group: (none)

Name: Marsden housing

Address Lines: 111 Bradford Road

Town: Wakefield

County: Yorkshire

Country: UK

Postal code: WF3 1SD

Contact: Mr Anthony Marsden

Telephone No.: 01924 846766

Fax No.:

Mobile No.: 07853 643922

Email: amarsden@marsdenhousing.com

Website: www.marsdenhousing.co.uk

When you select the contact, you have the option to fill in multiple names.

	Title	Forename	Surname	Telephone No.	Mobile No.	E Mail
☒	Mr	Anthony	Marden	01234 567890	0792345678	amarsden@marsdenho...
☐	Mrs	Angela	Marsden	01234 567890	07916489574	angela.marsden@mars...
→	<...					

Set as Default
Ok
Delete

From here you can also set which one you would prefer to be the default contact.

Once you have completed this, select the **Close** button.



To add a customer address to your letter, select the address *SMARTText*: “[Customer Address]” in your covering letter.

Quotation No:

Page: 1

[CUSTOMER ADDRESS]

Contract No:

Contract Description:

You now have an option to either fill in a new address card and save it, or you can select a customer name from the *Customer Address Book*. If you create a customer specific address, you will only be able to view it by selecting the **Select from customer address book** button.

Customer

Select from customer address book

Group

(none)

Name :

Marsden housing

Business Address :

111 Bradford Road
Tingley

Town :

Wakefield

County :

Yorkshire

Country :

UK

Postcode :

WF3 1SD

Fax :

0123456789

Website :

www.marsdenhousing.co.uk

Contact :

Mr Anthony Marden

Telephone :

01234 567890

Mobile :

0792345678

Email :

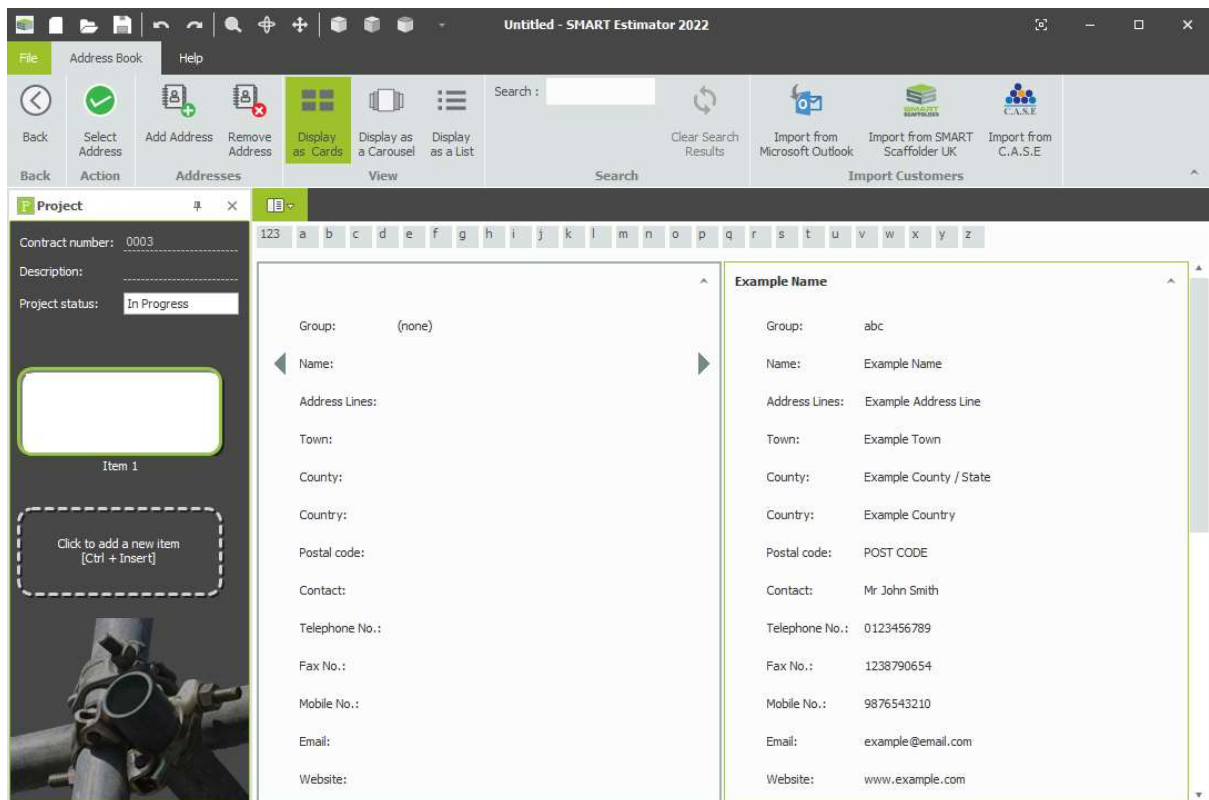
amarsden@marsdenhousing.com

Save New Customer

Save New Site

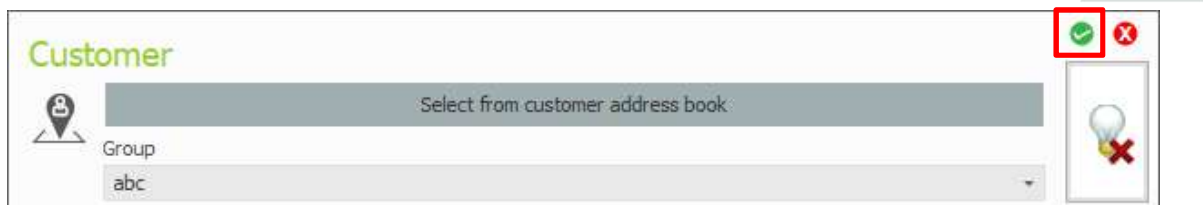
Save New Depot

This opens up your address book as before. Now select the customer you want to use.



Close the address book by pressing **Select Address**.

Select the green tick in the top right to accept your changes.



You will see this has now filled in your address on the letter, and added your contact information.



Mr A Customer

The Warehouse

A Street

A Town

A County

BB11 1BB

Contract No: 1234-090

Contract Description: House Types

FULL QUOTATION

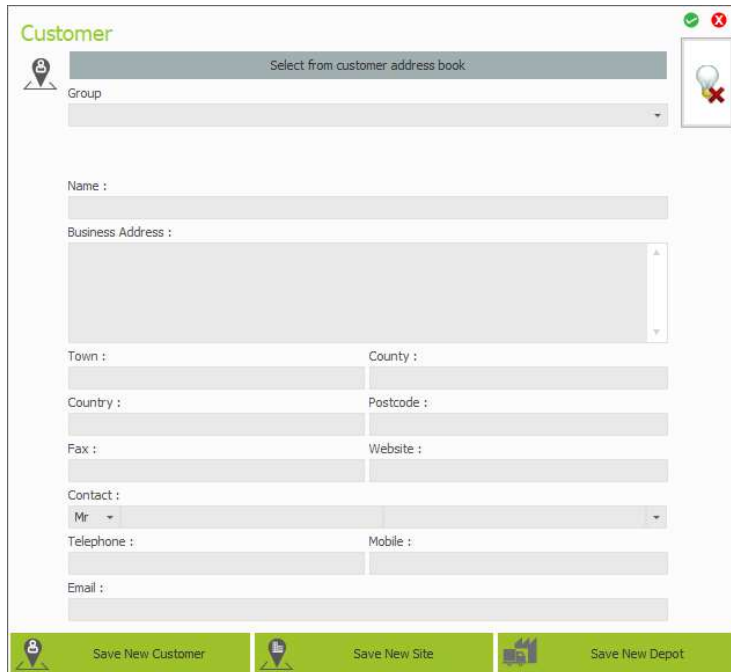
Dear Mr A Customer,

Save a site address

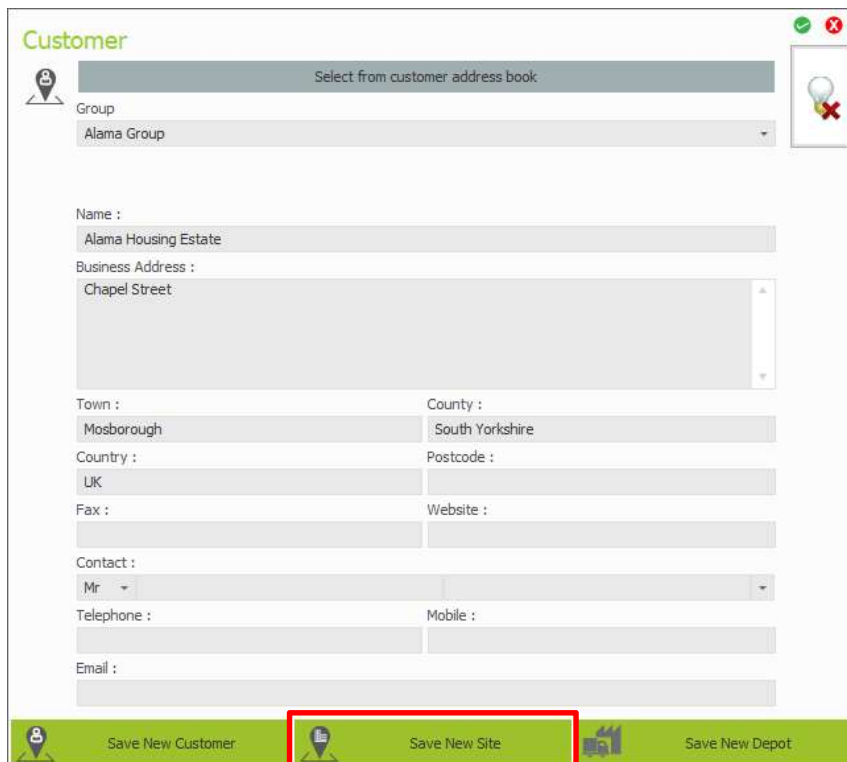
This time we will save a site address by filling in the pop-up card for it.

Click on the **[Site Address]** SMARTText in the quote.

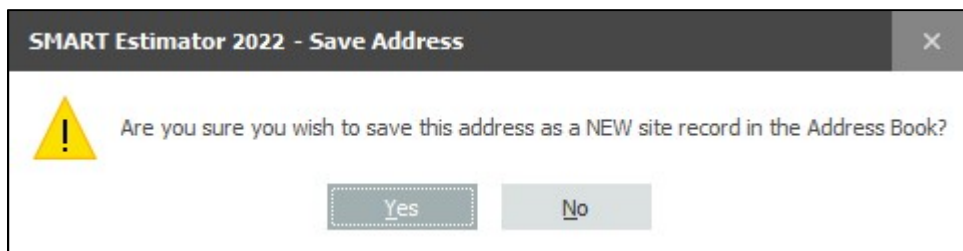
The pop-up card appears.



Type in the details of the site address. Then select the **Save New Site** button.

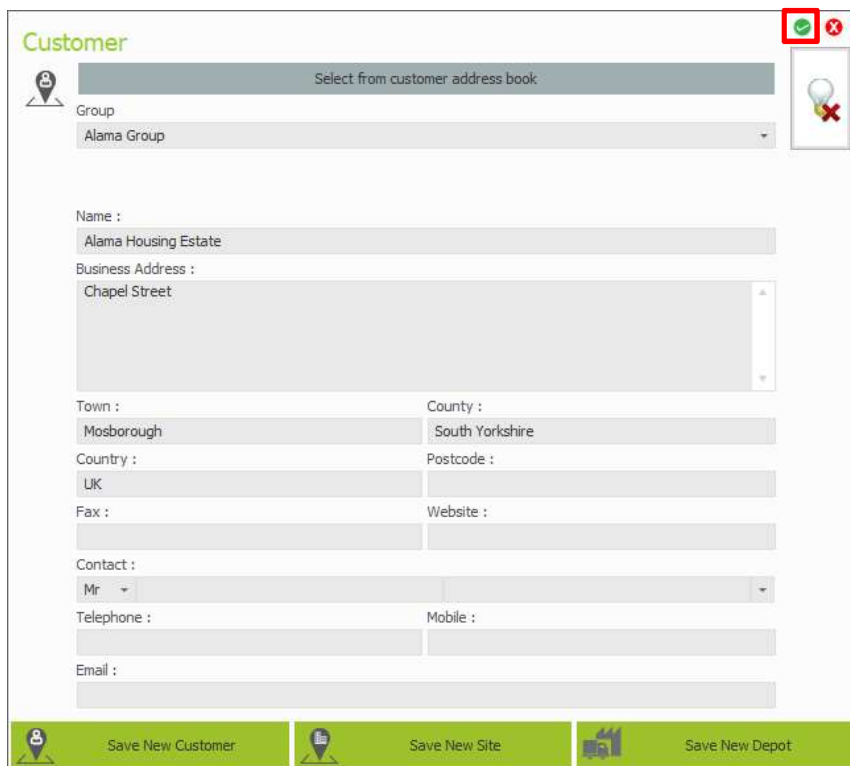


You will be asked whether you want to save this as a new site record. Answer “Yes”.



This is now saved as a site specific address. Now pick the green tick at

the top right of the dialog box.



This completes the section on adding customer and site addresses to the address book.

Edit the lead-in descriptions

A short description can be added to every item. These can be selected from **Quote IT**, but it is recommended that **Scheduling** is used for selecting a lead-in for each item. These “lead-in” descriptions are usually used for a small introductory paragraph briefly explaining what type of scaffolding will be included in the item.

You can use the lead-in description for any description you like.

To edit the lead –in description, click on it.

[LEAD-IN DESCRIPTION]

Physically tied scaffolding to give access for

An empty lead-in description

A sample filled in lead-in description

A box will appear with some tools:

Lead-In Descriptions			
Select	Name	Lead-In Description	Erase
☒	1. Independent phy...	Independent physically tied scaffolding to give access for gen...	x
☐	2. Independent phy...	Independent physically tied scaffolding to give access for roof ...	x
☐	3. Independent to p...	Independent physically tied scaffolding to give access for rend...	x
☐	4. Independent to p...	Independent physically tied scaffolding to give access for paint...	x
☐	5. Independent to p...	Independent physically tied scaffolding to give access for point...	x
☐	6. Independent to p...	Independent physically tied scaffolding to give access for ston...	x
☐	7. Independent to p...	Independent physically tied scaffolding to give access for repl...	x
☐	8. Independent to p...	Independent physically tied scaffolding to give access for repl...	x



Add Description

Select a clause from the **Select** column to choose it for this item.

You can change the name from the **Name** column. This name does not appear in the quote, but is used to quickly find lead-ins from **Scheduling**. Lead-ins are sorted by name in **Scheduling**, so adding a number at the start of the lead-in is a good way to set the position it will appear in the schedule list.

Change the lead-in text from the **Lead-In Description** column. Note that you should choose a font to match the quotation.

Remove lead-ins with the **Erase** button.

Finally, you can add new lead-in descriptions by pressing the **Add Description** button.

SMARTText descriptions

This section contains a description of the SMARTText fields currently available in SMART Estimator.

Project SMARTText

General

Menu Name	Display Name	Description
Contract Number	<<ContractNo>>	The contract number defined in the Project Browser .
Contract Description	<<ContractDescription>>	The contract description defined in the Project Browser .
Total Items (including multipliers)	<<NoItemsInContract>>	The total number of items in the Project Browser , multiplied by their respective <i>Quantities</i> .
Total Items in Project Box	<<NoSeparateItemsInContract>>	The total number of items in the Project Browser .
Today's Date	<<TodaysDate>>	Today's Date. This changes whenever the quote is opened.
Start Date	<<StartDate>>	The date work is expected to commence.
Creation Date	<<CreationDate>>	The date the quote was first saved.
My Signature	<<MySignature>>	Your signature graphic.
My Job Title	<<MyJobTitle>>	Your job title.
Terms and Conditions	<<TermsAndConditions>>	A list of conditions, usually added at the end of the quotation.
Item Summary table	<<ContractItemSummaryTable>>	A table of all items in the project, together with their price and hire period.

Pricing

Menu Name	Display Name	Description
Total Extra Hire	<<ContractTotalExtraHire>>	Total additional hire for the project.
Longest Hire Period	<<ContractLongestHirePeriod>>	The largest hire period for any item.
Highest Material Supply Rate	<<ContractHighestMaterialSupplyRate>>	The highest % supply rate for materials of any item.
Total Labour Cost	<<ContractTotalLabourCost>>	Total labour cost for the project.
Total Material Cost	<<ContractTotalMaterialCost>>	Total material cost for the project.
Total Labour Overhead	<<ContractTotalLabourOverhead>>	Total labour overhead for the project.
Total Material Overhead	<<ContractTotalMaterialOverhead>>	Total material overhead for the project.
Total Profit	<<ContractTotalProfit>>	Total profit for the project.
Total Discount	<<ContractTotalDiscount>>	Total discount (not including <i>Main Contractor Discount</i>) for the project.

Pre-MCD Total Tendered Price	<<ContractPreMCDTotalTenderedPrice>>	The total tendered price for the project before the <i>Main Contractor Discount</i> is taken off.
Highest MCD %	<<ContractHighestMCDPercentage>>	The highest <i>Main Contractor Discount</i> percentage used by any item.
Highest Quantity	<<HighestItemQuantity>>	The highest <i>Quantity</i> used by any item.
Pre-Tax Total Tendered Price	<<ContractPreTaxTenderedPrice>>	The total tendered price for the project before tax.
Total Tax	<<TotalTax>>	The total tax for the project.
Total Tendered Price	<<ContractTenderedPrice>>	The total tendered price for the project.
Rate Set Used	<<ContractRateSet>>	The name of the pricing rates used for this project.
Tax Text	<<TaxText>>	Either "All prices exclude tax." or "All prices include tax." The tax name is taken from the pricing.
Pre-Tax Unit Total Tendered Price	<<ContractPreTaxUnitTenderedPrice>>	The total tendered price for one of each item in the project (before tax).
Day Work (per person per hour)	<<DayWorkRate>>	The rate for Day Work, as set in Price IT via the Labour Options menu.

Addresses

Menu Name	Display Name	Description
Postcode (check IT)	<<CheckScaffoldPostCode>>	The post / zip code used to calculate the TG20 check's wind factor.
Customer Address	<<CustomerAddress>>	The customer's address.
Site Address	<<SiteAddress>>	The site's address.
Depot (Yard) Address	<<DepotAddress>>	The address of your scaffold yard.
My Address	<<MyAddress>>	Your company address.
Customer Name	<<CustomerName>>	The customer's (company) name.
Site Name	<<SiteName>>	The site's name.
My Name	<<MyName>>	Your company name.
Customer Contact Name	<<CustomerContactName>>	The customer's selected contact name, including their title, forename and surname.
Site Contact Name	<<SiteContactName>>	The site's selected contact name, including their title, forename and surname.
My Contact Name	<<MyContactName>>	Your selected contact name, including the title, forename and surname.
Customer Telephone	<<CustomerTelephone>>	The customer's selected contact telephone number.
Site Telephone	<<SiteTelephone>>	The site's selected contact telephone number.
My Telephone	<<MyTelephone>>	Your selected contact telephone number.
Customer Fax	<<CustomerFax>>	The customer's selected contact fax number.
Site Fax	<<SiteFax>>	The site's selected contact fax number.
My Fax	<<MyFax>>	Your selected contact fax number.
Customer Email	<<CustomerEmail>>	The customer's selected contact email address.
Site Email	<<SiteEmail>>	The site's selected contact email address.
My Email	<<MyEmail>>	Your selected contact email address.
Customer Contact Title	<<CustomerContactTitle>>	The customer's selected contact's title, such as "Mr".

Site Contact Title	<<SiteContactTitle>>	The site's selected contact's title, such as "Mr".
My Contact Title	<<MyContactTitle>>	Your selected contact's title, such as "Mr".
Customer Contact Forename	<<CustomerContactForename>>	The customer's selected contact's forename, such as "John".
Site Contact Forename	<<SiteContactForename>>	The site's selected contact's forename, such as "John".
My Contact Forename	<<MyContactForename>>	Your selected contact's forename, such as "John".
Customer Contact Surname	<<CustomerContactSurname>>	The customer's selected contact's surname, such as "Smith".
Site Contact Surname	<<SiteContactSurname>>	The site's selected contact's surname, such as "Smith".
My Contact Surname	<<MyContactSurname>>	Your selected contact's surname, such as "Smith".

Item SMARTText

General

Menu Name	Display Name	Description
Name	<<ItemName>>	The item's name.
Number	<<ItemNo>>	The position of the item in the Project Browser .
Number of Scaffolds	<<NoScaffoldsInItem>>	The number of separate scaffolds in the item.
Systems	<<Systems>>	A list of all the scaffolding systems used in the item.
Clauses	<<Clauses>>	A list of clauses specific to this item.

Pricing

Menu Name	Display Name	Description
Quantity	<<ItemName>>	The item's name.
Hire Period	<<ItemNo>>	The position of the item in the Project Browser .
Labour Total	<<NoScaffoldsInItem>>	The number of separate scaffolds in the item.
Output Pay Total	<<Systems>>	A list of all the scaffolding systems used in the item.
Erect Total	<<ErectScaffoldTotal>>	The total cost to erect all of the scaffolding in the item.
Dismantle Total	<<DismantleScaffoldTotal>>	The total cost to dismantle all of the scaffolding in the item.
Adaptions Total	<<AdaptionsTotal>>	The total cost to adapt all of the scaffolding in the item.
General Labour Total	<<GeneralLabourTotal>>	The item's general labour.

Additional Costs Total	<<AdditionalCostsTotal>>	The item's additional labour cost (including travel expenses, wage-on costs, etc.)
Expenses Total	<<LabourExpensesTotal>>	The item's additional labour expenses (including travel expenses, labour downtime, etc.)
Wage On-Costs Total	<<WageOnCostsTotal>>	The item's labour wage-on costs.
Materials Total	<<MaterialsTotal>>	The item's total material cost.
Material Hire for 100% Supply	<<Material100PercentageSupplyTotal>>	The item's total material cost if 100% of materials were supplied.
Material Supply %	<<MaterialSupplyPercentage>>	The % of materials which will be supplied.
Material Hire Total	<<MaterialHireTotal>>	The item's total material hire cost.
Contract Expenses Total	<<ContractExpensesTotal>>	The item's material contract expenses (including hire expenses, sale expenses and transport).
Material Purchase Total	<<MaterialPurchaseTotal>>	The item's total material purchase cost.
Other Costs Total	<<OtherCostsTotal>>	The item's other costs total.
Direct Costs Total	<<DirectCostsTotal>>	The item's total direct costs (labour + materials).
Overheads Total	<<OverheadsTotal>>	The item's total overheads.
Labour Overhead Total	<<LabourOverhead>>	The item's total labour overhead.
Material Overhead Total	<<MaterialOverhead>>	The item's total material overhead.
Costs Total	<<TotalCosts>>	The item's total cost (labour, materials, other costs and overheads).
Margins Total	<<MarginsTotal>>	The item's total margin.
Profit Total	<<ProfitTotal>>	The item's total profit (not including discount).
Material Mark-Up Total	<<MaterialMarkUp>>	The profit made by selling materials in this item.
Profit Margin Total	<<ProfitMargin>>	The item's total profit margin.
Discount Total	<<Discount>>	The item's total discount (not <i>Main Contractor Discount</i>).
Pre-Tax Unit Tendered Price	<<PreTaxUnitTenderedPrice>>	The tendered price for one of this item before tax.
Pre-Tax Tendered Price	<<PreTaxTenderedPrice>>	The tendered price for this item before tax.
Pre-MCD Tendered Price	<<PreMCDTenderedPrice>>	The tendered price for this item before <i>Main Contractor Discount</i> is applied.
Main Contractor Discount (MCD) %	<<MainContractorDiscountPercentage>>	<i>Main Contractor Discount</i> percentage.
Main Contractor Discount (MCD) Total	<<MainContractorDiscount>>	The value of the <i>Main Contractor Discount</i> .
Tax %	<<TaxPercentage>>	The % value applied for tax.
Tax Total	<<Tax>>	The value of tax.
Total Tendered Price	<<TenderedPrice>>	The item's total tendered price.
Unit Extra Hire	<<UnitExtraHire>>	The item's total additional hire for a quantity of one.

Total Extra Hire	<<TotalExtraHire>>	The item's total additional hire including the item quantity.
------------------	--------------------	---

Description

Menu Name	Display Name	Description
Physically Tied Description	<<IsPhysicallyTied>>	"Physically tied" if any scaffold in the item is tied to a façade. Otherwise blank.
Progressive Description	<<ProgressiveDescription>>	If a discount for progressive erection and dismantling has been applied, this shows a sentence which describes this.
Adaption Description	<<AdaptionDescription>>	Whether the scaffolding will be adapted or not.
Add-ons Description	<<AddOnsDescription>>	A list of all the add-ons, such as bridges, present in the item.
Scaffold Dimensions	<<ScaffoldDimensions>>	A table of all scaffolds and scaffolded elevations in the item, together with their dimensions.
Lift Heights Description	<<LiftHeightDescription>>	The maximum and most common lift height in the item.
Guardrails Description	<<GuardrailsDescription>>	A description of the guardrails.
Decking Title	<<DeckingTitle>>	The word "Decking" for use as a title. This is hidden if there are no scaffolds with decking descriptions in this item.
Decks Description	<<DecksDescription>>	Lists the board / deck material used in the item.
Toe Boards Description	<<ToeBoardsDescription>>	Lists the toe boards used in the item.
Access Title	<<AccessTitle>>	The word "Access" for use as a title. This is hidden if there are no scaffolds with access descriptions in this item.
Access Description	<<AccessDescription>>	Describes ladders, ladder towers and stairs present in the item.
Loading Title	<<LoadingTitle>>	The word "Loading" for use as a title. This is hidden if there are no scaffolds with loading descriptions in this item.
Loading Description	<<LoadingDescription>>	Describes the loads applied to the scaffold. You will need Check IT TG20:13 to choose these loads.
Scaffolding Type	<<ScaffoldingType>>	If only one type of scaffold is present, this shows the scaffold type. Otherwise, this shows "scaffolding".
Item Usage Description	<<ItemUsageDescription>>	Sometimes known as a 'lead-in'. The purpose the item will be used for.
Maximum Nominal Grid	<<MaximumNominalGrid>>	The largest nominal grid size for loading the scaffolding.
Scaffold Width	<<ScaffoldWidth>>	The width of the scaffold, including inside boards and cantilever 'hop-up' platforms.
Lead-In Description	<<LeadInDescription>>	An optional pre-defined description introducing the item. Lead-ins can be customised (see the Edit the lead-in descriptions section).

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 **Quote IT** can be used with the rest of the SMART Estimator products:

Model IT

SMART Estimator **Model IT** is a powerful 3D modelling tool. Use it to create scaffolds to exactly meet your project-specific needs. You can set details about these scaffolds such as their names, the scaffolding systems being used and their dimensions. These details can all be used in the quotations.

Schedule IT

SMART Estimator **Schedule IT** can be used in a similar way to **Model IT**. It can be used to rapidly create large multi-scaffold projects. All of the dimensions and names will appear in the quotations.

Report IT

Check, customise and print material lists and technical drawings for your project, which can be sent along with the quotations.

Price IT

Produce highly customisable pricing reports as well as reusing the pricing information in the quotations.

BIM Toolbox

Create scaffolds more quickly, using information from an existing model, or export data from SMART Estimator to be used in other design software.



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.