ProMaster Hardware

by WH Software Limited

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Part 1

1 About

Welcome to ProMaster Hardware version 7 and thank you for choosing ProMaster Hardware.

ProMaster Hardware is an architectural hardware scheduling program for manufactures, architects and hardware supply merchants. It is developed using the latest computer software in response to current marketplace requirements. With this comprehensive documentation, you will find creating your hardware schedules a quick and simple task.

It can be used on a stand-alone machine or networked on a LAN (Local Area Network).

We are confident you will find it an easy and enjoyable program to use. Any suggestions/comments for improvements in future versions are welcome, and may be addressed via email to support@whsoftware.com

Part 2

2 Copyright notice

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Although WH Software Limited has used its best efforts to eliminate inaccuracies from this user guide, it could contain technical inaccuracies and typographical errors. Changes made from time to time to the information contained in this user guide will be incorporated in later editions of this user guide.

Product manufacturers do not authorise the information contained in ProMaster Hardware. Manufacturer names are used for identification purposes only.

License

Full license agreement: The ProMaster Hardware installation program includes the full license agreement, which you must read and agree to in order to continue the installation. After installation, the license agreement may be read by clicking the menu Help then License on the main application window.

WH Software Limited
P.O. Box 300-655
Albany
Auckland 0752
New Zealand

Contacting WH Software Limited

Part 3

3 Contacting WH Software Limited

Mailing address:	WH Software Limited P.O. Box 300-655 Albany Auckland 0752 New Zealand
Website:	WH Software Limited maintains an Internet site on the worldwide web. The URL of this site is: http://www.whsoftware.com This site has product information and product updates for download. As with any Internet site, it changes frequently, so visit it often.
Email:	For sales and pre-sales related questions send email to sales@whsoftware.com For technical questions send email to support@whsoftware.com

Part 4

4 Introduction

4.1 Using this guide

This user guide covers the use of ProMaster Hardware.

This guide is for anyone who installs, uses or administers ProMaster Hardware.

It teaches you how add and maintain your projects, manage special finishing, shipments, installations and claims, and various other activities.

Assumptions

The assumption is made that:

- All computers involved meet the system requirements
- The installer and users are familiar with and confident using Microsoft Windows
- The installer has administrator access on the computers where the installation is to be performed
- The users understand hardware scheduling concepts.

4.2 Product editions

There are two editions of ProMaster Hardware available. ProMaster Hardware Premium gives a wealth of features and allows for multiple users in a networked environment. ProMaster Hardware Basic gives a solid set of functionality for single user installations.

Throughout this documentation you will see references to Premium and Basic to identify functionality and requirements specific to each edition.

Installing

Part 5

5 Installing

This section describes the architecture of ProMaster Hardware, and the installation options available. It describes the installation process and components that are installed onto your computer.

5.1 Architecture overview

Basic edition overview

ProMaster Hardware Basic edition is completely self contained on a single computer. It uses a Firebird database like the Premium edition, but operates with the database embedded engine rather than the client server engine.

No TCP/IP connectivity used other than the initial internet access for product activation.

Premium edition overview

ProMaster Hardware Premium edition is a client-server application, with the back-end using a Firebird database and the Firebird database engine. Communication between the client processes and the server are performed using TCP/IP.

One machine is designated as the server, and this machine hosts the database and the Firebird database engine. All clients (both other computers running ProMaster Hardware and also ProMaster Hardware running on the server) communicate with the Firebird database engine via the TCP/IP networking protocol.

No direct communication with the database file is performed, so client machines do not need physical file access to the database.

The server must always be available so that the workstations are able to access your ProMaster Hardware database. The server must be protected from unplanned restarts and power outages.

You should install ProMaster Hardware on the server before you install ProMaster Hardware on the workstations.

The ProMaster Hardware program communicates with its processes running on your server on TCP port 30634 and TCP port 30635

> **Premium edition:** A common installation mistake is to assume that for ProMaster Hardware to operate, the database on the server must be made accessible to the client machines by using a Windows Share. This is not correct. **Do not create a Windows Share to make the database file accessible to the client machines.** All communication is performed using the TCP/IP networking protocol to the Firebird database engine. The Firebird database engine, which resides on the server where the database is located performs all file operations on the database.

5.2 System requirements

ProMaster Hardware Premium hardware requirements

This product edition is installed on a single network server (which may for small installations be used also as a workstation) and a portion of the product can be installed on workstation computers for each user. All parts of the program and also the program database are located on the network server, and a portion of the program is located on each workstation.

The minimum server computer hardware requirements are:

Requirement	Minimum	Preferred minimum
Windows version	Windows 8.1 Windows 10 Windows 11	Windows 2019 Servers should use a server operating system

	Windows 2012/2012 R2 Windows 2016 Windows 2019 Windows 2022	
CPU		i7 or XEON
RAM (available)	4GB	
Hard disk drive space	4GB	According to the size of your database and sufficient space to leave 14 days backup on the server.
Mouse or other pointing device		
Display	1024 x 768 24 bit colour	

The minimum workstation computer hardware requirements are:

Requirement	Minimum	Preferred minimum
Windows version	Windows 8.1 Windows 10 Windows 11	Windows 10
CPU	Core i5, 2 cores minimum	i5
RAM (available)	1GB	
Hard disk drive space	100MB	
Mouse or other pointing device		
Display	1024 x 768 24 bit colour	1920 x 1080 24 bit colour
Printer	Windows supported printer is required for reports	
Label printer	Windows supported printer label printer with a minimum 100mm label width is required for labels	

ProMaster Hardware Basic hardware requirements

This product edition is installed on a single workstation and does not have any components installed on a network server. All parts of the program and also the program database are located on the workstation.

The minimum workstation computer hardware requirements are:

Requirement	Minimum	Preferred minimum
Windows version	Windows 8.1 Windows 10 Windows 11	Windows 10
CPU	Core i5, 2 cores minimum	i5
RAM (available)	1GB	
Hard disk drive space	4GB	According to the size of your database and sufficient space to leave 14 days backup on the server.
Mouse or other pointing device		
Display	1024 x 768 24 bit colour	1920 x 1080 24 bit colour

Printer	Windows supported printer is required for reports	
Label printer	Windows supported printer label printer with a minimum 100mm label width is required for labels	

Notes about hardware requirements

- Ensure the most recent service pack for your operating system is installed.
- System requirements are minimum requirements and good performance depends on ensuring your hardware and networking reflect your usage style and resources required by other running applications.

Networking protocol requirements (Premium edition only)

ProMaster Hardware Premium requires that the TCP/IP networking protocol be installed and functioning correctly. Normally this is done as part of installing Windows. If you do not have TCP/IP installed and correctly configured then you should install it before proceeding with the installation. See your Windows documentation or systems support person for help installing TCP/IP.

Firewall software (Premium edition only)

Firewall software is increasingly popular to help protect from malicious computer attacks. If you are running any type of firewall software you must ensure that it allows ProMaster Hardware to communicate on TCP port 30634 and port 30635.

If ProMaster Hardware is unable to communicate with its database (on the network server), try disabling your firewall software to identify the source of the problem.

5.3 Installing ProMaster Hardware

Before you begin

- Make sure your computer meet the minimum requirements
- Make sure you have your ProMaster Hardware registration information
- Make sure you understand what type of installation you want to perform
- Make sure you have administrator or equivalent access to each computer

When installing ProMaster Hardware Premium edition, always install the server first.

Starting ProMaster Hardware setup

- Start your computer and log in if necessary.
- Insert your ProMaster Hardware CD into your CD-ROM drive.
- If Windows automatically detects the CD then ProMaster Hardware Setup will appear. Otherwise, click Start, and then Run. At the prompt, type the following command, replacing **d** with the letter assigned to your CD-ROM drive:

d:\PHS7Setup.exe
Press ENTER.

- Follow the instructions that appear.

You must choose the correct installation type (Premium or Basic) that matches your product license. The product license will not operate with the wrong type of installation.

Upgrading from ProMaster Hardware 5

During the setup you are asked if you are performing a new installation or if you are upgrading from ProMaster Hardware 5.

The upgrade from ProMaster Hardware 5 needs to to connect to your old database to read information from it. Options are provided for how to connect to the V5 database.

- The upgrade from V5 brings into your new database some configuration information and your users.
- The upgrade from V5 exports global data (e.g. associates, inventory types, brands, inventory to CSV files. I.e. The data is not imported into your new database - you must do this later.
- The CSV files are placed in the location C:\ProgramData\WH Software\PHS7\PHS5Dump (or the corresponding location if using an old Windows version).
- The CSV files will need to be manipulated in Excel to complete any missing data before you can import them into ProMaster Hardware. See the various topics on importing data.
- No project data is imported into the new database.

> ProMaster hardware 7 does not upgrade your projects or data from version 5. During the software design process we identified a number of data requirements to support version 7 capabilities that do not exist in version 5 and could not be automatically generated. Additionally, projects have a limited life cycle so there is no significant disadvantage to running out old projects in version 5 and starting new projects in version 7.

Project data exports from version 5

For the situation where a ProMaster Hardware 5 project is in the tender stage, or possibly just won but with little or no activity, you may prefer to reconstruct the project in ProMaster Hardware 7. To support this, an update to version 5 has been produced (v5.7102.0.0) that exports a bunch of files containing project data to aid you in reconstructing the project in version 7 and to import doors and door inventory. For a project without activity, the time to bring a project across is not too onerous.

5.4 File locations

The folder locations used by ProMaster Hardware depend on a number of factors including:

- The type of installation that you performed.
- Any choices you made to change the default installation locations.
- The Windows operating system (32 bit or 64 bit) that you are running.

This topic describes the default locations.

For purposes of this illustration the following assumptions are made:

- The standard Windows locations are being used and that you are running an English language version of Windows.
- The login name of our user in this example is joebloggs.

For information on the files installed to each location see the topic Description Of Files Installed.

Purpose of location	Installation types	Folder location
Main location of application	All	C:\Program Files\WH Software\PHS7 (and various sub folders)
Shared settings, settings used by background	All	C:\ProgramData\WH Software\PHS7

processes, logs created by system and background processes		
User specific settings, user data cache, logs created by user processes, user dictionaries	All	C:\Users\joebloggs\AppData\Local\WH Software\PHS7
Database	Premium: Server Basic: Workstation	C:\ProgramData\WH Software\PHS7\Data
Database engine	Premium: Server	C:\Program Files\WH Software\PHS7\FB
Database engine	Basic: Workstation	C:\Program Files\WH Software\PHS7\FBE
Database client connectivity	Premium: Workstation	C:\Program Files\WH Software\PHS7\FB

5.5 Description of files

During the installation process, various files are installed on your computer. The following explanation describes the most important files and in doing so assumes that the default locations were used during the installation. See the topic File locations13 for an overview of folder locations and differences between folder location on various versions of Windows.

Location: C:\Program Files\WH Software\PHS7\Bin

File	Description
PHS7.exe	The main application file for ProMaster Hardware
PHS7.kme	Configuration file
PHS7Back.exe	Database backup program
PHS7Upg.exe	Application upgrade helper
DelZip192.dll	Application support file

Location C:\ProgramData\WH Software\PHS7\Data

File	Description
PHS7.fdb	ProMaster Hardware database

Location C:\ProgramData\PHS7

File	Description	Notes
PHS7.ini	Application settings shared by all users and application settings for background processes (PHS7Back)	This is where the database connections are configured. Other than configuring database connections, there should be no need to edit this file manually.
Log\PHS7Back.log	Log file created when a database backup is run in "auto" mode.	Server only.

Location: C:\Users\joebloggs\AppData\Local\WH Software\PHS7

File	Description	Notes
PHS7.ini	Application settings specific to this user	All settings are configurable in PHS7 so this file should not be edited manually.
Log\PHS7.log	Log file created when this user performs a database upgrade.	This operation should only be performed on the server, so the only place this file should be created is on your server.
Log\PHS7Back.log	Log file created when this user runs a database backup.	This operation should only be performed on the central server, so the only place this file should be created is on your server.
Spell\Custom.adu	Custom spelling settings	
Spell\SuggestionLearn.adl	Custom spelling settings	

Using ProMaster Hardware for the first time

Part 6

6 Using ProMaster Hardware for the first time

This section gives a brief overview of using the software controls, and describes what to expect when you first use the software.

6.1 Navigating

Throughout this guide the assumption is made that you are confident using Windows, selecting menu items, clicking buttons, tabbing between controls etc.

For the sake of simplicity, this guide uses concise ways to refer to various actions. Because there are many ways to use Windows, the user is expected to perform many of these tasks in the way that they feel most confident.

Here are some examples:

Navigating menus

If this document says, Choose the menu option **Project** then select **Open,** you could do this in any of the following ways:

- Click your mouse on the menu **Project** then when the drop down menu appears click your mouse on the menu **Open**

Or

- Using your keyboard press **Alt-P** for the **Project** menu then **O** for the **Open** menu.

Or

- Press **Ctrl-O** because that is the short cut key to perform the Open action.

Navigating windows

Moving around

The **Tab** key on your keyboard moves forward between fields.

Buttons

Click a button means; Either click the button with your mouse, or **Tab** to the button so it is the active control and press the **Enter** key on your keyboard, or **Tab** to the button so it is the active control and press the **Space Key** on your keyboard, or if there is a hot key for the button you may press that key combination.

Now that's a whole lot of different ways to use that button, but the real point here being that while the documentation refers to clicking a button, often the better way is to use the keyboard, especially if it is only a couple of key presses away from where you are. You certainly would not want to read the previous paragraph over and over again!

Check boxes

Checks boxes, may be referred to as flags or options throughout this document. They are called this because they are either on (they contain a tick or cross) or off (empty box). Tabbing onto them and using your **Space Key**, or clicking on them with your mouse changes check boxes.

Drop down lists or combo boxes

Combo boxes, or drop down lists give you a list of choice for that field. A value may be selected using your mouse, or by tabbing onto the field and using your keyboard. The key combination Alt-Down Arrow makes the list drop down. Often the fastest way to make a selection is to tab onto the combo box and press the first letter of the selection.

Default button

You may notice that many windows have one button that looks a little different to all other buttons. It may be a different colour or it may have a dark border around it. This button is called the **Default** button. The default button is operated by the **Enter** key on your keyboard from wherever you are on the window, provided that the current control does not have a use for the **Enter** key.

> On some of the more complex windows with multiple buttons, you will notice that as you tab from one control to another the default button may change. The reason for this is to allow the Enter key to perform to most common action.

An example of this behaviour is all search windows.

As you tab between the criteria fields at the top of the window, the **Find** button is the default button. Pressing **Enter** actions the **Find** button.

After you action the **Find** button, and the results are displayed, you are positioned on the list so you can make your selection using the arrow keys on your keyboard. When you are on the list, the **Find** button is no longer the default button, but instead the **OK** button (or some other button) is now the default button.

This means that when you are on the list, pressing the **Enter** key will action the **OK** button and effectively choose that action on the highlighted item.

Cancel button

With few exceptions, when a window has a **Cancel** button, the **Escape** key on your keyboard will operate that button.

> Learning to navigate and make selections with your keyboard rather than your mouse will dramatically improve the speed with which you operate.

6.2 The administrator's first time

After installing ProMaster Hardware, the first time you log in you must use the **admin** login.

The **default password** for any new user (unless domain based authentication is used), including the admin user is **password**.

The first thing you must enter is your ProMaster Hardware registration information. This information is provided by your ProMaster Hardware reseller when you make your purchase. The details must be entered exactly as they are shown on your registration sheet or the registration will not be accepted.

Proceed to configure ProMaster Hardware by visiting these areas of the product:

- Company information 38
- Company logo for reports 38
- Application parameters 37
- Users 36

These are the "basics" for getting the product up and running. Other configurations are necessary for your data.

6.3 A user's first time

The first user who logs into ProMaster Hardware will be required to activate the product. See Activating ProMaster Hardware 20

See Setting your preferences 84 for help configuring ProMaster Hardware to behave the way you work.

6.4 Licensing and product activation

License enforcement

ProMaster Hardware maintains a record of the number of users connected. ProMaster Hardware is licensed on a per-user basis. If you are unable to log into ProMaster Hardware because you are attempting to use more connections than you have licenses, please contact your reseller to purchase additional licenses.

Product activation

ProMaster Hardware requires **Product activation** before it becomes fully functional. Product activation is an anti-piracy technology designed to verify that the product has been legitimately licensed and thwart the spread of software piracy.

Activation is completed either directly via the Internet or by a telephone call to a customer service representative.

Activation on your server: Your ProMaster Hardware installation is activated on and locked into your server. The first user to log into ProMaster Hardware other than the admin user must perform the activation.

Activation can be achieved in one of the following ways:

- Over the internet direct to the WH Software Limited activation server
- Via your web browser to the ProMaster Hardware web site activation page
- By telephone to your reseller or to a ProMaster Hardware representative

6.5 Activating ProMaster Hardware

If your computer is internet connected, always choose the option to perform the activation automatically as this will allow you to perform the activation without waiting for assistance. If you are not internet connected, choose the manual option and call WH Software Limited while you are in front of your computer.

If the automatic activation is successful, you will be able to use ProMaster Hardware immediately.

For a manual activation, the WH Software Limited customer service representative will ask you for the information presented by ProMaster Hardware and on verification will read to you an activation code to enter into ProMaster Hardware.

> The best option is to do the activation automatically. Manual (telephone) activation should be used only when automatic activation is not available.

Part 7

7 Understanding concepts

This section introduces the concepts of hardware scheduling and the way that they are implemented in ProMaster Hardware.

It is important to understand, that like real-world processes, ProMaster Hardware models the hardware scheduling process by allowing you to perform most tasks in any order you choose.

In introducing the concepts, we will show the straightforward way of producing a schedule in each scenario.

It is important to understand these concepts and the terminology used to describe them.

When you understand the scheduling concepts used within ProMaster Hardware, you will be ready to move on to Using ProMaster Hardware 84.

Each concept topic builds on the knowledge gained in the previous topics, so it is beneficial to read all topics.

7.1 Concepts and terminology

Terminology explained

Term	Description
User	A user is a person who uses ProMaster Hardware. Users must be created in ProMaster Hardware and each time a user starts ProMaster Hardware he or she must log in. Users are granted permissions which restrict the activities they may perform. There is a special user called **admin** that is used for the first log into ProMaster Hardware, and is responsible for a variety of global program settings.
Associate	Associates are a global pool of data. An associate is anyone who is associated in any way with the project. One or more associates are made available for use in a project.
Consultant	Consultants are a global pool of data. Consultants are people whom work for your company in the capacity of consulting on projects. Each project has any number of consultants associated with it, but only one is designated as the main consultant.
Project	A project encapsulates all the door, inventory and activity data associated with it. Projects are identified by a unique number called the project Number.
Door	A project has one or more doors. Each door in turn has inventory items associated with it, and each item has attributes such as the quantity, if it requires installation or special finishing, etc. Generally a door is treated as an opening rather than literally as a door, but that is your choice.
Inventory	Inventory is the product that you supply and/or install. It exists as a global pool, of which a subset is made available for use within a project. It is possible also to add project specific inventory items, but this is discouraged as there is not a good reason to do so (it is better to add the inventory items to the global pool).
Quote	A quote is the mechanism through which each item to be supplied, installed or finished is given a price, then the quote is released, prohibiting further changes and then submitted to the project manager. Once a quote is accepted, that is the trigger to allow items on that quote to be supplied. The main contract for a project may have multiple quotes (e.g. to different associates), but only one quote may be accepted. Once a main contract is in place, any project changes require a variation, and each variation has one quote for the items changes in that variation.
Finishing	Items on a project may require finishing. Broadly speaking, there are two types of finishing. Products that require dimensions are handled in a special manner to allow dimensions to be recorded and to produce corresponding manufacturing instructions, reports and labels. The best example of a product requiring dimensions to be finished are kick plates. Products that do not require dimensions but require some form of

	finishing are recorded also, and manufacturing paperwork is produced. An example of a product requiring this type of finishing may be a door lever that requires a powder coat.
Shipment	A shipment it the mechanism through which items which appear on an accepted quote are supplied. Tools are provided for packaging the shipment and producing paperwork and labels. A project may have any number of shipments and the items shipped on each shipment may span the main contract and variations and may be individually selected.
Installation	If a project is configured to allow installation, then one or more installation requests may be made. An installation request is the process by which the items to be installed are requested of the installer. After an installation request is released, it may then have the items marked as complete when the installer has performed the tasks. projects allow for two stage installations. The first stage is called the dryfit. Consider dryfit to be a "dry run" - that is, not the main install. In particular, some items require a dryfit stage and benefit from it such as mortice locks. The dryfit stage of the installation is used for the mortising, then possibly some weeks later the lock is installed as the install stage of the process. Through the two stage installation process, accurate records and billing become possible. The requirement to dryfit and/or install is controlled at an individual item level on each door.
Claim	A claim is the process by which you request payment for items shipped, items that have had special finishing and are shipped, and items that have undergone a dryfit and/or install. Claims gather all unclaimed items up to and including the claim date.
Variation	After the acceptance of the quote on the project main contract, any changes to the project require a variation. Creating a variation unlocks the project, allowing changes, and all subsequent changes are associated with that variation. When the changes for a variation are completed, a quote must be created for the variation and then accepted (with an authorisation number) to allow the variation items to proceed to shipping and installation.
Estimate	After the acceptance of the quote on the project main contract, a variation of type "Estimate" may be created then changes made to the project as they would be for a standard variation. When the changes are finished, you create an estimate which reads the door and door hardware changes from the variation and creates an estimate, then removes the variation leaving the project in the state it was before the the "estimate variation" was created. The estimates module is licensed as a separate feature to the main product. Contact WH Software Limited (See Contacting WH Software Limited 6) or your ProMaster Hardware reseller for more information.
Communication	A communication is the process of recording discussions and emails about a project. Communications may be linked to various items in the project to allow easy access to relevant communications.
Document	The document management system allows any number of documents to be associated with a project or items within a project (e.g. doors) and also with communications. For example, documents may be textual, pdf documents, word or excel documents or whole email messages.

7.2 Basic scheduling

This topic looks at the concepts behind the most straightforward schedule.

Create Project

The start of a schedule begins with the creation of a **Project**. You will record information such as the project number, site description, site address, various defaults, the parties associated with this project and any notes about it.

> All projects are identified by a **Project Number**. The **Project Number** is a number or mixture of numbers and letters that forms a unique way of identifying the project. That is, no two projects will share the same **Project Number**.

Enter Doors And Hardware

Of course, the most important part of producing a working schedule it to record all doors and the hardware that is to be installed on each door.

Just prior to beginning on your doors, you may elect to step sideways a little and to specify what inventory items are to be used within the project. This is of course something which you can do at any time, including adding inventory items as required while you are adding doors.

The process of entering doors involves:

- Entering door information such as door number, door description, door area, handing, door type, and notes.
- Specifying the inventory items on each door, and the quantity of each.

Quoting

Quoting is about pulling together summary information about all of doors that you have added to the project.

At the initial stage of quoting on a project, you can enter as many quotes as you wish.

When the entry of a quote is complete, you will release the quote, then deliver the quote via printout or email documents.

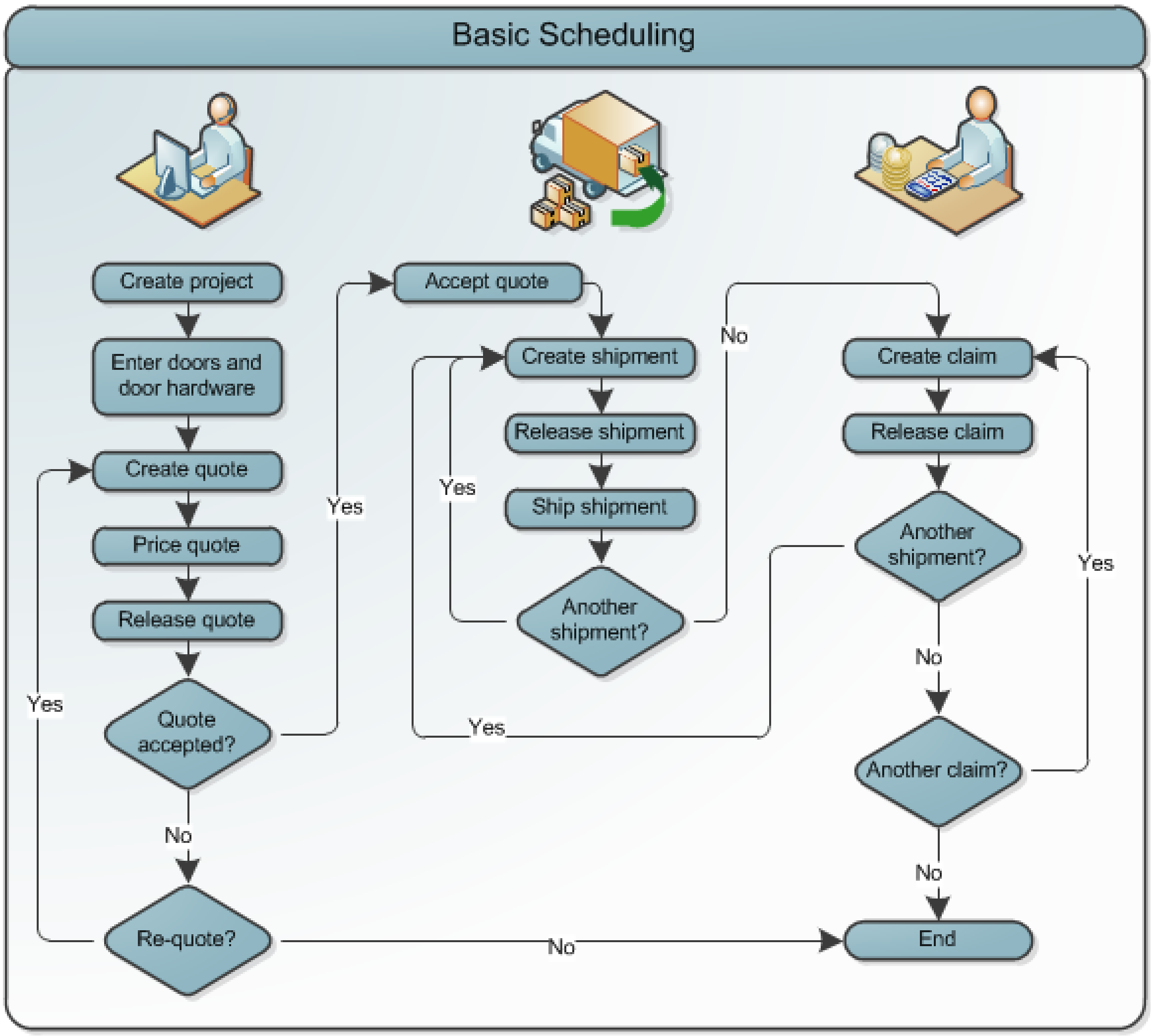
Ultimately, if the project is to proceed, you will accept one (and only one) quote. When you accept a quote, all other quotes that you have produced will be automatically rejected.

In producing a quote you will:

- Enter the body of the quote document (or select it from a pre-defined template).
- Price each inventory item that is required by the quote
- Release the quote
- Deliver the quote
- Accept the quote when the acceptance is gained from the customer.

> The acceptance of a quote is a key indicator for subsequent project activity as no item that appears in the project may have any further activity associated with it unless it appears on the accepted quote.

Before we go on, here's a diagram of the concept that we are discussing. This far, we have covered the left most portion of the diagram.



ProMaster Hardware basic scheduling process without variations, alternatives, installations, etc.

Shipments

Shipments, as the name suggests, represents the delivery of goods.

A project may have any number of shipments.

In the shipment process, you will:

- Decide what to include in the shipment by choosing doors, door types, door areas, inventory items etc.
- Decide how to package the goods for shipment.
- Release the shipment.
- Enter packaging information for the shipment
- Print shipment documents and package labels.

Claim

Claiming is the process of identifying the parts of a project for which you are requesting reimbursement. On some projects you may claim for everything, while on other projects you may produce claims that successively identify goods and services that have been provided and request incremental payment.

A project may have any number of claims.

In the claim process you will:

- Decide what to include in the claim by referring to quotes and shipments.
- Release the claim.
- Deliver claim documents.

> Note: ProMaster Hardware is not a stock control application, nor is it an accounting application. As such, it does not produce invoices. If you operate on a claims basis, the claim may be used directly. If you operate on an invoice basis then you must turn to your accounting software to produce the necessary invoices.

7.3 Scheduling with variations

This topic expands on the material in the Basic scheduling 23 topic by introducing the concept of **Variations**.

What Are Variations

While everyone tries their best to ensure that specifying schedules are complete and accurate, there invariably arises situations where the schedule must be altered.

Some reasons for this are:

- Items are inadvertently omitted from the initial schedule.
- The customer makes alterations to the building, necessitating the addition or removal of doors and inventory.
- The purpose of parts of the building are changed, thereby requiring different product.

How Variations Are Handled

Whenever a change is made within a project, whether it is adding a door, removing a door, or altering inventory on doors, the change is associated with a variation.

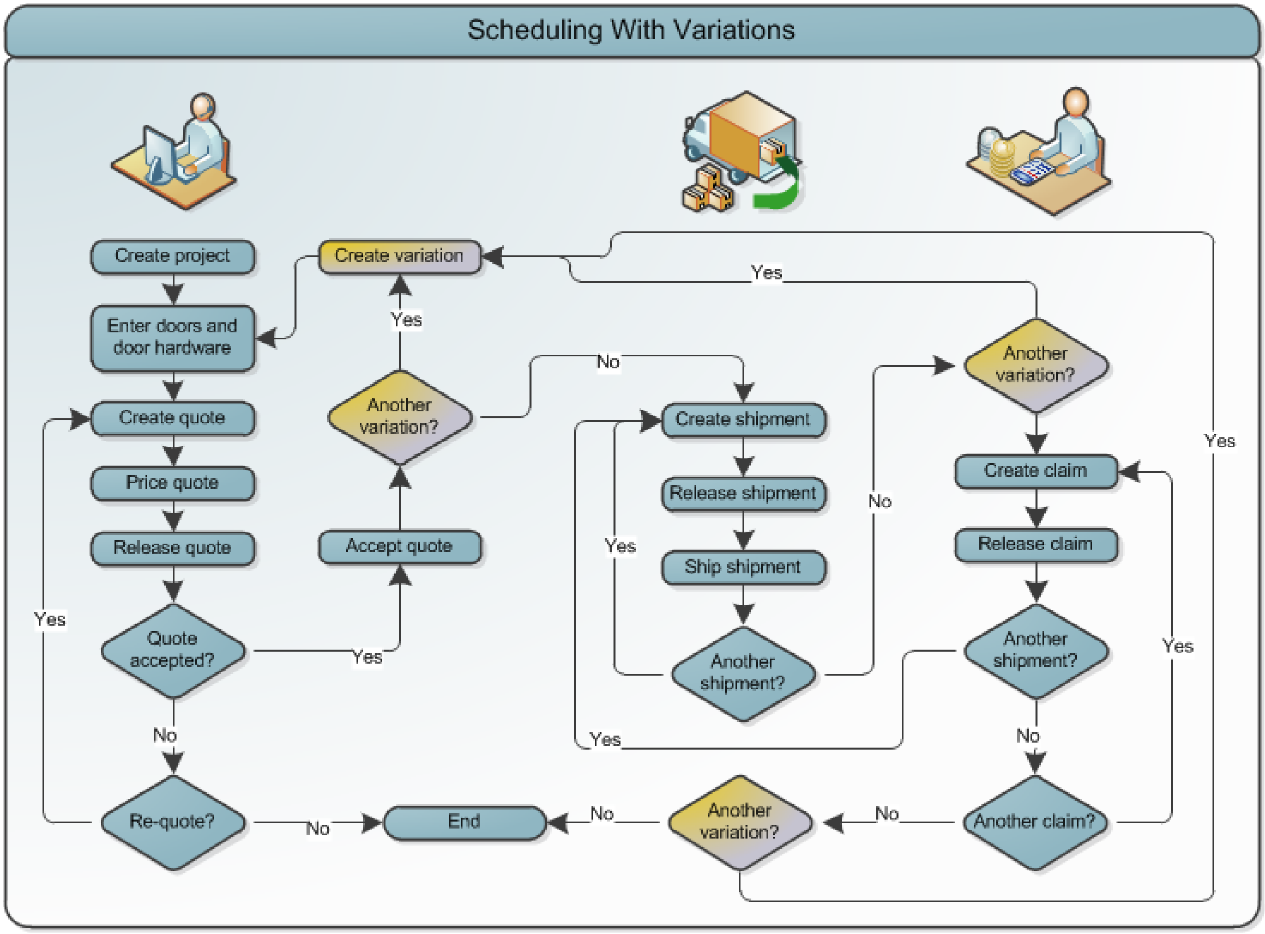
All initial changes are tied to a variation called Variation 0, which is the **Main Contract**. The initial variation, variation 0, is a special case and is handled transparently. After the initial quote is accepted, the project is locked and you will be unable to add or alter doors.

To unlock the project, you create a **variation**. Now, with an active variation, you may proceed with the schedule changes.

Quoting on variations is largely the same as the initial quoting except for the following notable differences:

- Only one quote may be produced for each variation.
- Alternatives may not be offered on a variation.

> Only one variation may be active at any point in time. If more than one variation was allowed to be active the result would be a situation where changes may inadvertently be entered against the wrong variation, thereby producing quoting, claiming and potentially legal difficulties.



ProMaster Hardware scheduling process with variations, without alternatives, installations, etc.

After quoting on the variation and releasing the quote, the project is once again locked and any further changes require the creating on another variation.

As you can see in the diagram, variations and the door changes within the variation may occur at any time.

7.4 Scheduling with alternatives

This topic expands on the material in the Basic scheduling[23] topic by introducing the concept of **Alternatives**.

What Are Alternatives?

When you enter the specified items for a project, you may identify situations where another product may be acceptable to or preferred by the customer. There are various reasons for this:

- An alternative product may be cheaper.
- An alternative product may offer the possibility a greater profit margin.
- An alternative product may be more suitable to the application.
- The specified product may not satisfy rating and fire regulations.
- An alternative product may be more reliable.
- The specified product may have unacceptable supply delays.

Alternatives are a powerful way of winning a project by offering an alternative product of equivalent quality and suitability, while selecting a product that allows for a more competitive price.

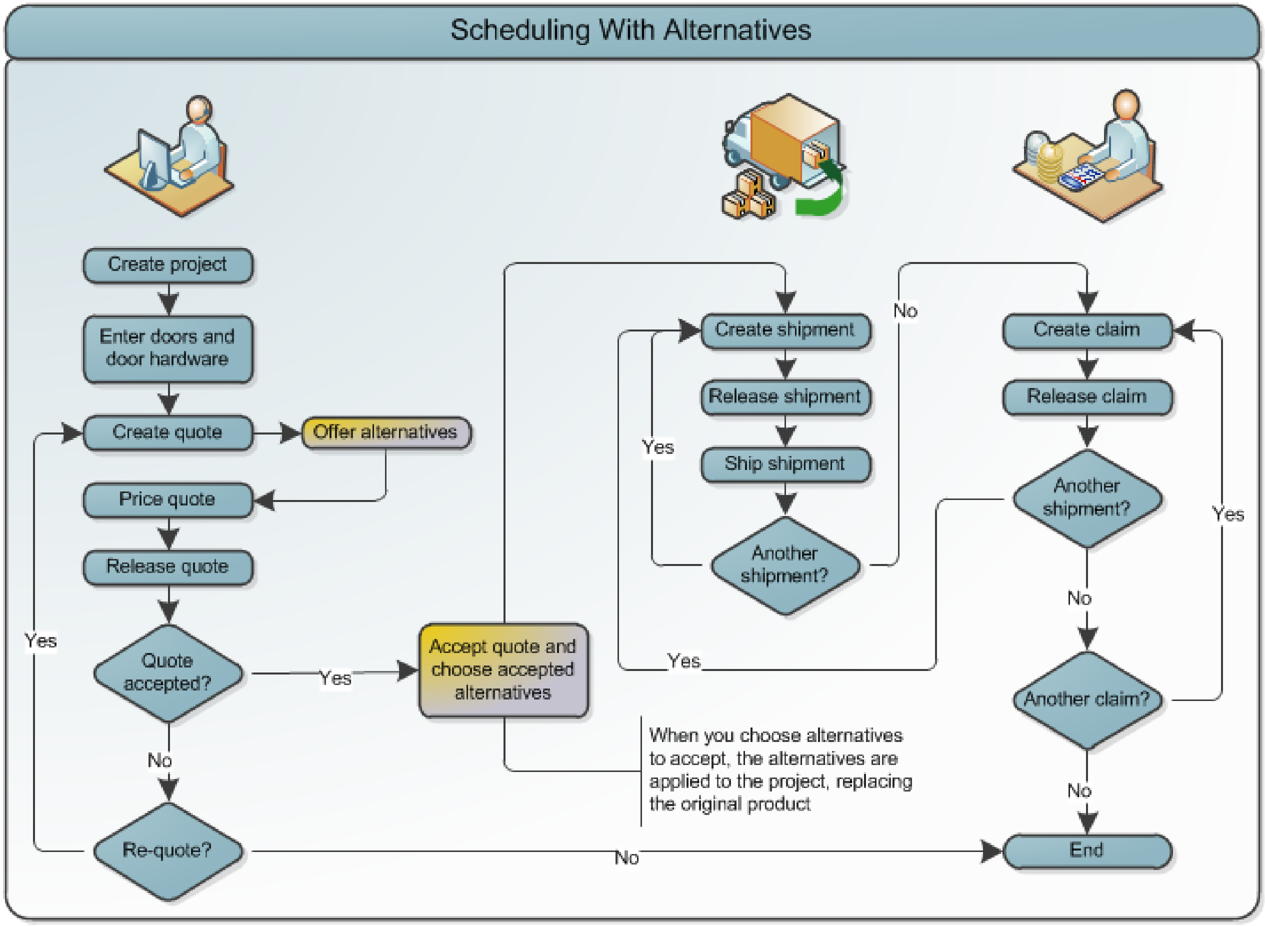
Specifying Alternatives

At the time of creating a quote, or any time prior to releasing the quote, you may choose a product to be used for replacing a specified product.

You may specify more than one suitable product for replacing any scheduled product.

Most often you will include an amount of documentation describing why you are proposing the alternative product.

The alternative offerings are itemised on the quotation documentation.



ProMaster Hardware scheduling process with alternatives but without variations, installations, etc.

Accepting A Quote With Alternatives

When you receive the quote acceptance from the customer, you then mimic the acceptance by accepting the quote within ProMaster Hardware.

The process of accepting a quote that offers alternatives involves you indicating which alternatives have been accepted.

ProMaster Hardware will not allow you to make the mistake of accepting alternatives that are not logically possible. e.g. If you offered two distinct alternatives for a particular product, then in accepting the quote you must choose at most only one of the two alternatives offered for this product.

There are some technical differences involved in accepting a quote with alternatives.

These are:

- The project is duplicated so that an unmodified copy of the project is stored.

- The alternatives that you accept are then applied to the base project, altering the inventory specified for each door as necessary.
- The quote is altered, with the chosen alternatives applied, thereby allowing accurate reflecting the accepted quote.
- All quotes that would be rejected in a project with out alternatives are removed as they have no meaning to the modified project (they will be viewable in the duplicate project created).

After the quoting stage, the scheduling process proceeds as previously described in Basic scheduling 23 .

Administering ProMaster Hardware

Part 8

8 Administering ProMaster Hardware

This section covers many topics related to administering ProMaster Hardware, but not using it for scheduling. Some of the items described are specific to the **admin** user, but many items are applicable to users with appropriate permissions to perform the tasks. The topics are separated from those in Using ProMaster Hardware 84, which relate to the scheduling process.

8.1 Database upgrades and backups

8.1.1 Database upgrades

Periodically, updates are made available for ProMaster Hardware. These updates add new functionality and rectify anomalies.

Updates are always in the form of a setup program that installs a new version of the ProMaster Hardware program and any necessary support files.

For the Premium edition, updates must be installed only on the server. During the update process other users must not be using ProMaster Hardware. When workstations log into ProMaster Hardware subsequent to the update they will be upgraded automatically.

When the update is installed, ProMaster Hardware is run automatically and you are taken to the **Database Upgrade Wizard**. The tasks shown in the **Database Upgrade Wizard** vary depending on the version you have installed and the previous version that was in use.

You need to know the **Admin** password to apply database updates.

The database upgrade window may also be accessed from the **Tools** menu when you are not logged in. This is necessary only if for some reason the update does not complete during its installation.

> Both the installation of the update onto your server, and subsequent updates that are propagated to your workstations require administrator access to run as they write new versions of the program files on to your system.

8.1.2 Backing up your data

Regular backups are important. It is also very important that backups are transferred to separate media and then stored in a secure location away from your computer systems.

> Rule: If you don't backup it up, you have to be happy to lose it.

Do not copy the database

Because the ProMaster Hardware database may be used at any time by a ProMaster Hardware user, you should never copy or backup the ProMaster Hardware database directly unless you can be 100% certain that it will not be used while you are copying it.

The backup program provided with ProMaster Hardware is more smart than a simple file copy. A backup created with ProMaster Hardware backup program may be produced while others are using ProMaster Hardware.

Extending on this, do not backup the database file (the FDB file and any associated files) directly with a third party backup solution. Only ever use ProMaster Hardware Backup to produce backups, then you may freely backup the resultant files using a third party backup solution.

The ProMaster Hardware backup program does another task that is vitally important to the health of the database while the backup is running. It is responsible for "garbage collection" in the database which eliminates old unnecessary data and therefore controls database performance and bloat. It is responsible also for recalculating index quality which is vital for maintained performance.

WARNING: Live backups made with ShadowProtect or similar when the database is in use are of limited use. The reason why is that they make a point in time snapshot of the database, but do not capture a read-consistent view of the data. If a backup made with ShadowProtect or similar is restored, there is a very good chance that it will be corrupt, and look to the database engine very much like someone pulled the power cord out of the wall. Consider this to be a expensive exercise to repair the database. ALWAYS run the ProMaster Hardware backup program. The backup files produced by the ProMaster Hardware backup can be captured safely by ShadowProtect etc.

Producing Backups

To produce a backup:

- Click the **Backup...** button.
- Select the **Database to backup** (most likely you have only the database called Default)
- Alter the destination **Folder** if you wish. You may choose to have the backup copied to a second folder. The backup folder must be a local drive on the server. The second folder is accessed by the backup program rather than the database engine, and may be located on a network share.
- Click the **Save settings and run backup** button.

The file that the backup creates has a FBK file extension. Should then need arise, the backup program can be used to restore this file to reconstruct your database.

In the normal operation of ProMaster Hardware, the option **Perform database maintenance during the backup** is an important part of maintaining a healthy and efficient database. The only times you should do a backup with this option turned off is if you plan to discard the original database and immediately restore your backup, or if you need the backup to be performed as fast as possible. This option, while important, does add a small amount of time to the backup process.

Backups can be configured to automatically zip the **FBK** file into a **ZIP** file. This is achieved by turning on the **Compress the backup** flag. Zipping a backup reduces the amount of disk storage required for the backup, but does use more disk space and time during the backup process. Be aware that there is a maximum file size for zip files. Failure to do this may result in an unusable zip file. Unless disk space is is critically low, it is not recommended to use this option as it makes backups significantly slower and the backup file must be extracted in the event that it is to be restored.

The **Output additional progress and diagnostic messages** option produces messages about the various stages of backup. Many messages are produced and the backup will therefore run measurably slower. There is no need to use this option unless instructed to by ProMaster Hardware support staff.

Copy the backup to somewhere else

Backup files (either those with a **FBK** file extension or the zipped backups with a **ZIP** file extension) should be copied off your computer onto separate media. Backups should then be stored according to good business and computing practice to safeguard your data investment.

The cost of producing permanent backups is extremely small compared to the cost of re-entering data.

Restoring Databases

The process of restoring a backup to produce a working database will not overwrite an existing database. If it is your intention to replace your database by restoring a backup you must first locate your existing database and rename it.

To restore a backup:

- Click the **Restore...** button.
- Click the **Select...** button, and select the backup file (the FBK file) for database. If you zipped the backup, you must first extract the backup files from the zip archive (using WinZip or similar).
- Select the destination **Database to restore** (most likely you have only the environment called Default)

- Click the **Save settings and run restore** button.

The **Output additional progress and diagnostic messages** option produces messages about the various stages of restore. Many messages are produced and the restore will therefore run measurably slower. There is no need to use this option unless instructed to by ProMaster Hardware support staff.

Configure Auto Backup

In the ideal world you would create daily backups.

ProMaster Hardware Backup can be configured to:

- Backup multiple databases.
- Backup to one location and produce a copy of the backup at another location (e.g. another computer).
- Delete backups older than a given number of days (default 14).

To configure automatic backups:

- Click the **Setttings...** button.
- Tick the **Database environment**(s) to be backed up.
- Click the **Select Folder...** button to choose the destination folder for the backups. This must be on a local disk.
- If you wish, check the option **After the backup is created, copy it to the folder below** and click the corresponding **Select Folder...** button to choose the destination folder copy the backup to. Be aware that the backup process must have access to this location, so there is no point in choosing a remote folder that you can see when logged in as a user unless the scheduled backup process is also able to access that folder.
- Set the options. See the notes earlier about backup options.
- There is one additional option for the auto backup - **Recalculate index selectivity**. This option should be left on as it is responsible for maintaining database optimisation. It adds a small amount of time to the backup.
- Choose how long you want to keep backups. There are separate settings for the backup folder and the "copy to" folder. It is highly recommended that you keep a reasonable number of backups, perhaps 14 days. If you don't have enough disk space, get more.

Email

If you want an email notification after the scheduled backup has run, use the settings on the Email tab.

You may need to check with your mail administrator for the settings, and as there is a variety of mail servers in use, each with different characteristics, you may need to experiment a bit to get it right.

Option	Description
Server	The name or IP address of your mail server.
Port	The port on your mail server that receives the email.
Login name	If your mail server uses login based authentication, enter your mail login name.
Password	If your mail server uses login based authentication, enter your mail login password.
Encryption	Choose if you use an unencrypted mail connection and how the encryption works.
Sender's name	The name of the person to appear as the sender.

Sender's email	The email address of the person to appear as the sender. Some mail servers require the sender email to be the same as the SMTP login name if SMTP login name is used.
Sent to	Put in the email recipients, one per line.
Test	Sends a test message using the current settings. Useful for testing before saving.

Email - notes about Office 365

If you are using Office 365 as your mail provider, you will need to have it configured to provide the SMTP capability, and there are a number of settings you will need to get correct.

If you choose not to use encryption, Office 365 will need to be configured to use your external IP address as an authorised sender. In this case, the port is likely to be 25. This is not the preferred way to send to Office 365.

If you use encryption, the SMTP server is smtp.office365.com, the port is 587 and the encryption is StartTLS. This is the normal way to do it for Office 365.

Regardless of what you put in the sender's name and email address, Office 365 may override this with the name associated with the "Login name".

Run

If you want to run a program after the backup completes, turn on the "Run" option and select the program to run.

The name of the file created from the backup (fbk or zip) is passed to the program as the first parameter.

Schedule

- If you want to configure **Windows Scheduled Tasks** to start your backup each night, click the button **Schedule Auto Backup...**
- If you want to add the scheduled task yourself, the command to run is shown in the yellow area at the bottom of the settings.
- Finally, click **Save** to save your settings for **Auto Backups**.

Configuring Windows Scheduled Tasks

If you wish, you may access **Windows Scheduled Tasks** via your Start button and schedule the program **PHS7Back.exe** to run at a time of your bidding. If you do that, be sure to start **PHS7Back.exe** with the command line parameter **-auto**

Or, take the easy way. When you click on the button **Schedule Auto Backup...**, ProMaster Hardware Backup allows you to schedule the backup in your Windows Scheduled Tasks. To do this:

- Enter the Windows login of the user who will perform the backup. Usually on a domain this will be in the form of MYDOMAIN\Administrator.
- Enter the time each day that the backup is to run. This should be started at a time such that it will have completed before your off-site backup solution kicks in and backups the backup files produced by ProMaster Hardware Backup.
- Turn on the flag to enable the backup.
- Click **OK** to save the schedule.
- You will be prompted for the password for the Windows user account. The password is verified against the computer or domain and on success the schedule is saved.

If you wish to configure Windows Scheduled Tasks manually, consult your Windows documentation or Computer Consultant for information on how to configure your version of Windows for this task.
Your computer must remain on for Windows to be able to schedule tasks.
Here's a simple rule: **No power = No backup**.

Just like with a backup file that you create interactively, the backups produced when your schedule software starts the ProMaster Hardware Backup program should be copied to external media for safe keeping.

SCHEDULED TASK USER ACCOUNT
It is strongly recommended that you create a Windows user specifically for running the backup and use that user for no other purpose. The user will need to have permissions to log on to run a batch job, and will need permissions to the folders where the backup files are produced (including delete permissions so old backups can be removed). If you do this, make sure the account password is secure and never expires. It is all too common for users to configure scheduled tasks with an account, such as their own login then at some time in the future change their password. After that the backups will not run as scheduled task no longer has permissions to run.

Security

For security reasons, the ProMaster Hardware Backup program will not allow you to backup a database located on another computer. i.e. The backup must be performed on the server where the database is located.

Always test your scheduled backup by opening your Windows Scheduled Tasks and choosing to run the task immediately and verify that the backup files are produced. Check the task options to ensure that they make sense and that the task will run even if a user is not logged in.

8.2 Configuring

8.2.1 Users

For each person who uses ProMaster Hardware you should create a user account.

Each person then has their own login name and password, and ProMaster Hardware tracks information about who performed changes and restricts individual user access to functionality based on the access rights that you have defined.

Initially the admin user must configure user accounts, but you may (although not necessarily should!) give a user the ability to configure user accounts.

You may create as many user accounts as you wish. ProMaster Hardware restricts the number of concurrent users allowed by your license, but not the overall number of users that you define.

Any user that has performed activities is not able to be removed (but can be made inactive).

Getting started

- You must be logged in as the **admin** user or as a user who may configure user accounts
- From the **Setup and Admin** menu, select **Users**

Making a change

- Use the **Add**, **Remove** and **Properties** buttons the set up your users.

An explanation of the options

- Enter the user's **first names** and **last name.** These appear in various place and are fundamental to tracking activity on a user-by-user basis.

- Enter a unique **login name** for the user. How you chose the login will depend on the size of your organisation, but here are some examples: jb, joeb, joe.b, bloggs.j
- If you want the user to be authenticated against your Windows domain, enter the Windows Logon to which this ProMaster Hardware logon corresponds.

> If you do not enter a **Windows Logon** then ProMaster Hardware manages its own logon security. If you enter a **Windows Logon** for the user, then when you log onto ProMaster Hardware the password you enter is authenticated with your Windows Security Provider as a match to the **Windows Logon** name. The format for the **Windows Logon** allows all the normal Windows syntaxes (e.g. JoeBloggs, MYDOMAIN\JoeBloggs, JoeBloggs@MYDOMAIN, JoeBloggs@MYDOMAIN.local etc). Because the **Windows Logon** is authenticated with your Windows Security Provider then any password policies you have in place will apply to the user.

- The after hours phone and email are optional.
- When you create a user, the **Active** flag should be on. You can disable a user at any time by editing that user and removing the Active flag.
- If the user is located at a different location and you want reports to use a different address for the user, choose the branch address (Branch addresses are defined here: Branch addresses 39)

Security

Several security flags control the functionality that is available to each user.

8.2.2 Application parameters

Application Parameters define some program behavioural characteristics that are set by the **admin** user and are common to all users.

Getting started

- You must be logged in as the **admin** user
- From the **Setup and Admin** menu, select **Application parameters**
- Expand or collapse branches of the tree by clicking on the **[+]** or **[-]** buttons beside the folders.
- **Double Click** on the item that you want to change, make your change and click **OK**.
- When you have finished making changes, click **Save** to make them permanent.

Notes

- Items set to their default value are indicated by the empty page icon.
- Items that have been altered are indicated by the lined page icon.
- An item you have changed and is not yet saved is indicated with a disk icon.
- To reset an item to the default value, highlight the item and press Shift+Ctrl+Alt+Delete.
- Changes are not seen by other users until they log out then log in again.
- Right click on an item to see a menu of other functionality.

> Unless you know the application parameter you require, it is usually beneficial to search for some text in the parameter you are looking for. Use **Ctrl-F** to **Find** and **F3** to **Find next**.

8.2.3 Company information

Company information is displayed on the header or reports.

The company name is entered and fixed by your registration information, but you may enter address information and phone numbers.

Getting started

- You must be logged in as the **admin** user
- From the **Setup and Admin** menu, select **Company information**

Editing company information

- Enter a contact name, address, telephone and fax numbers.
- The bank account information is available for merging into quotes and claims.
- Click **OK** to save.

8.2.4 Company logo for reports

You may include a small graphic in the top left corner of reports, or replace the entire company portion of report headers with a full width logo.

Getting started

- You must be logged in as the **admin** user
- From the **Setup and Admin** menu, select **Company logo for reports**
- Choose the **Standard Image** tab for small graphic in the top left corner of reports or the **Full Width Image** tab for the logo that replaces the replace the entire company portion of report headers.

Changing the logo

- Click **Load logo** to select your graphic file.
- If you have a logo load and you no longer want to use it, clear it by clicking **Remove logo**.
- Click **OK** to save.

Notes

- The logo must be a png file. If you have a graphic in another format, you must first convert it (using a graphics editing application) to a png file.
- The small logo is rendered on the reports in a 25mm x 25mm square.
- The full width logo is rendered on the report 190mm wide for portrait reports and 277mm wide for landscape reports.
- Because the small logo is rendered in a square, you must ensure that your graphic is square (I.e. the height and width dimensions must be the same)
- The absolute number of pixels in your graphics file will determine the quality of the rendered image. Consider about 300 dpi to be satisfactory quality in which case the graphics file needs to be about 240 pixels high and 240 pixels wide.
- Change the Application parameter 37 **Report header style** under **Reports** to specify no logo, small log or full width logo.

> Making your graphics file excessively large will not result in a noticeable quality improvement, but will have an adverse impact on performance, particularly in printing speed and the size of any PDF files produced.

8.2.5 Branch addresses

If your staff operate from more than one location, and you want the address where each user is situated to appear on reports instead of the main company address, then you will require Branch Addresses.

If your company has a single address then branch addresses are not applicable to you.

Getting started

- You must be logged in as the **admin** user
- From the **Setup and Admin** menu, select **Branch addresses**
- Search for branch address in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter branch addresses.

Notes

- Be sure to give each address a meaningful description so that when you select the address you are certain of your selection.
- To associate a branch address with a user, see the topic Users 36

Importing branch addresses from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Read the topic Branch address import (CSV) file format 240 for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.3 Parameter data

This section describes numerous types of data that are generally considered to be relatively static parameter data.

See also the topic Exporting parameter data to a csv file 78 for information about exporting this data.

8.3.1 Associate types

Associate types are used for categorising associates.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Misc parameters** then **Associate types**.
- Search for associate types in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter associate types.

Importing associate types from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Read the topic Associate type import (CSV) file format 239 for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.3.2 Consultant descriptions

Consultant descriptions are used for documenting or classifying consultants' roles within a project.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Project parameters** then **Consultant descriptions**.
- Search for consultant descriptions in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter consultant descriptions.

Importing consultant descriptions from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Read the topic Consultant description import (CSV) file format 240 for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.3.3 Door extra data names

Door extra data names are used as names when adding additional user-categorised data to a door.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Door parameters** then **Door extra data names**.
- Search for door extra data names in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter door extra data names.

Importing door extra data names from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Read the topic Door extra data names import (CSV) file format 241 for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.3.4 Door finish defaults

Door finish defaults are globally defined defaults that may be imported for use in a project. A project may also define its own values however for any values used repeatedly it is more efficient to define them as default values.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Door parameters** then **Door finish defaults**.
- Search for door finish defaults in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter door finish defaults.
- You must provide a description and a short description. Generally projects would be configured to display the short description and the long description is used for clarification when producing a project legend. You may record notes if you feel the item needs an explanation. When printing a project legend there is a choice to include the notes in the legend.

Importing door finish defaults from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Read the topic Door finish defaults import (CSV) file format 242 for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.3.5 Door handing defaults

Door handing defaults are globally defined defaults that may be imported for use in a project. A project may also define its own values however for any values used repeatedly it is more efficient to define them as default values.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Door parameters** then **Door handing defaults**.
- Search for door handing defaults in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter door handing defaults.
- You must provide a description and a short description. Generally projects would be configured to display the short description and the long description is used for clarification when producing a project legend. You may record notes if you feel the item needs an explanation. When printing a project legend there is a choice to include the notes in the legend.

Importing door handing defaults from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Read the topic Door handing defaults import (CSV) file format 242 for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.3.6 Door type defaults

Door type defaults are globally defined defaults that may be imported for use in a project. A project may also define its own values however for any values used repeatedly it is more efficient to define them as default values.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data

- From the **Setup and Admin** menu, select **Door parameters** then **Door type defaults**.
- Search for door type defaults in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter door type defaults.
- You must provide a description and a short description. Generally projects would be configured to display the short description and the long description is used for clarification when producing a project legend. You may record notes if you feel the item needs an explanation. When printing a project legend there is a choice to include the notes in the legend.

Importing door type defaults from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Read the topic Door type defaults import (CSV) file format 243 for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.3.7 Frame finish defaults

Frame finish defaults are globally defined defaults that may be imported for use in a project. A project may also define its own values however for any values used repeatedly it is more efficient to define them as default values.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Door parameters** then **Frame finish defaults**.
- Search for frame finish defaults in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter frame finish defaults.
- You must provide a description and a short description. Generally projects would be configured to display the short description and the long description is used for clarification when producing a project legend. You may record notes if you feel the item needs an explanation. When printing a project legend there is a choice to include the notes in the legend.

Importing frame finish defaults from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Read the topic Frame finish defaults import (CSV) file format 243 for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.3.8 Frame type defaults

Frame type defaults are globally defined defaults that may be imported for use in a project. A project may also define its own values however for any values used repeatedly it is more efficient to define them as default values.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Door parameters** then **Frame type defaults**.
- Search for frame type defaults in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter frame type defaults.
- You must provide a description and a short description. Generally projects would be configured to display the short description and the long description is used for clarification when producing a project legend. You may record notes if you feel the item needs an explanation. When printing a project legend there is a choice to include the notes in the legend.

Importing frame type defaults from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Read the topic [Frame type defaults import (CSV) file format](244) for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.3.9 Inventory brands

Inventory brands are the brand or manufacturer associated with an inventory item.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Inventory parameters** then **Inventory brands**.
- Search for inventory brands in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter inventory brands.
- Each brand has a name and may also have a web address to the brand web site.

Importing inventory brands from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Read the topic Inventory brand import (CSV) file format245 for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.3.10 Inventory finishes

Inventory finishes are the finish or colour associated with an inventory item.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Inventory parameters** then **Inventory finishes**.
- Search for inventory finishes in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter inventory finishes.
- You must provide a description and a short description. Generally projects would be configured to display the short description and the long description is used for clarification when producing a project legend.

Importing inventory finishes from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Read the topic Inventory finish import (CSV) file format 246 for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.3.11 Inventory rating countries

Inventory rating countries are the countries used to group inventory ratings (See Inventory rating) 54 . Typically you would have only one country unless you are involved in international projects.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Inventory parameters** then **Inventory rating countries**.
- Search for inventory rating countries in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter inventory rating countries.

Importing inventory rating countries from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Read the topic Inventory rating country import (CSV) file format 250 for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.3.12 Inventory ratings

Inventory ratings may be applied to doors to specify the rating required and also associated with inventory items to designate the inventory suitability for a rating. Each rating is specific to a country. Under some construction legislation there may be very specific and detailed ratings while under others codes like "Fire30", "Fire60", etc. suffice to designate fire ratings.

> Ratings are not required to use ProMaster Hardware and are not used by most specifiers. A carefully maintained database or ratings allows for error checking on schedules created by staff who are not familiar with the product specifications.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Inventory parameters** then **Inventory ratings**.
- Search for inventory ratings in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter inventory ratings.

- You must provide a country, rating code and a description. Comprehensive notes may be stored if necessary to explain the rating application.

Importing inventory ratings from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Read the topic Inventory rating import (CSV) file format 250 for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Data remapping

Country: The imported values for Country must be mapped to values stored within ProMaster Hardware.

Any values that match existing information are mapped automatically and you will see on those lines the **Value from database** will be completed. For all lines where the **Value from database** is blank, you must: Click the line then choose the correct value from the **Use value** drop down list, then click she **Set** button to set that value for the line you are working on. Repeat this process for all incomplete lines. If you make a mistake simply repeat the process on the erroneous line to alter it.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.3.13 Inventory types

Inventory types are used for categorising inventory.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Inventory parameters** then **Inventory types**.
- Search for inventory types in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter inventory types.
- You must provide a description and a short description. Generally projects would be configured to display the short description and the long description is used for clarification when producing a project legend.
- The ProMaster Master Keying category designates how the inventory type is treated when exporting data for master keying. For master keying it is necessary to identify for a door which items are keyed items (Lock, cylinder or double cylinder) and these are treated by ProMaster Master Keying as lockable products.

Importing inventory types from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Read the topic Inventory type import (CSV) file format[251] for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.3.14 Lock function defaults

Lock function defaults are globally defined defaults that may be imported for use in a project. A project may also define its own values however for any values used repeatedly it is more efficient to define them as default values.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Door parameters** then **Lock function defaults**.
- Search for lock function defaults in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter door type defaults.
- You must provide a description and a short description. Generally projects would be configured to display the short description and the long description is used for clarification when producing a project legend. You may record notes if you feel the item needs an explanation.

Importing lock function defaults from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Read the topic Lock function defaults import (CSV) file format [251] for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.3.15 Project extra data names

Project extra data names are used as names when adding additional user-categorised data to a project.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Project parameters** then **Project extra data names**.

- Search for project extra data names in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter project extra data names.

Importing project extra data names from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Read the topic Project extra data names import (CSV) file format252 for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.

- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.3.16 Templates

Templates are used in various places in projects to provide the body of text, often with merge fields that will later be replaced with project data. Templates have a description that helps the user identify them, and they are categorised by **type**, which is where they are used and by **usage** which specifies if the template is a complete document Template, or simply a paragraph that will be inserted into another document.

In most instances (e.g. Quote, shipment, install, claim, estimate) it is vastly more efficient to create one or more templates with all the information you might require, then when you use the template in a project simply delete from the project copy of the template any parts that you do not require. This way of working is significantly more efficient than attempting to build the text required by a project from several paragraphs.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Project parameters** then **Templates**.
- Search for templates in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter templates.
- You must provide a type, usage and description.
- When editing the template text you may insert merge fields by right clicking and choosing the menu option **Insert field**. Fields are listed according to the type of data they represent. Some fields are available in all template types that allow fields while others are specific to a particular template type. Fields are stored in your document as plain text enclosed in brackets. Any field that is unknown or misspelt will be ignored when the document is used. Some fields take additional parameters to modify their appearance.

e.g. To display the associate postal address, the field is [Assoc_Addr_Post]. This will display the address on multiple lines. To have the address formatted for a single line, the field may include the SL parameter. Parameters are separated by a semi-colon. E.g. [Assoc_Addr_Post;SL].

More complex parameters are available on some fields such as tables. e.g. [Extra_List] includes values defined in project extra data that are flagged for inclusion (Extra data values may be flagged for use in quotes, shipments, installs ands claims). The following parameters are available for extra data: ValueOnly specifies that the value should be shown but not the name associated with it. NoBorder specifies that the table of data is to be drawn without border lines on the cells. Widths allows you to specify widths for the table columns. Widths must add up to 100% or less and the correct number of widths must be provided. E.g. [Extra_List;Widths=20,60] will make the name column 20% of the page width and the value column 60% of the page width (Hence the whole table is 80% of the page width)

8.4 Associates

Associates are all people and companies, other than your own consultants, that are in any way associated with your projects.

8.4.1 Entering associates

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data

- From the **Setup and Admin** menu, select **Associates**.
- Search for associate in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter associates.

The associate name would normally be the associate's company name. The associate type is used to categories the associate and the description allows for you to provide an annotation. You may choose to enter associate codes (and also codes for associate contacts) if your other systems use codes.

Fields are provided for a postal address and a delivery address and on the notes tab you may record any amount of notes about the associate.

Associate contacts are the people who work for the associate. Associates must have at least one contact defined to be able to be used within a project. On the associate contacts tab you use the **Add**, **Remove** and **Properties** buttons to enter and alter contacts for the associate. Like the associate, each contact may have a postal and delivery address, but if the contact uses the company address, the "Use this address..." box is left unchecked and a contact specific address is not entered. Contacts have personal details such as a mobile phone number and email address. The email address is used when project information is sent to the associate contact.

8.4.2 Importing associates from a csv file

If you have associate data in a CSV file, it is possible to import this data.

This topic describes the process of importing a CSV associate file.

Read the topic Associate import (CSV) file format[238] for more information on the file contents allowed.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Associates**.

Importing data

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Data remapping

Associate type: Each of the values found in the file for the field **Associate type** must be mapped to an existing **Associate type**. If the import values match, then the remapping will be completed automatically. Correct each import associate type value by selecting it, then selecting the correct associate type from the **Use value** drop down list and clicking the **Set** button.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.4.3 Importing associate contacts from a csv file

If you have associate contact data in a CSV file, it is possible to import this data.

This topic describes the process of importing a CSV associate contact file.

Read the topic Associate contact import (CSV) file format 236 for more information on the file contents allowed.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Associates**.

Importing data

To import data from a csv file, click on the **More tasks** link then choose **Import associate contacts from a csv file**.

A simple wizard steps you through the import process.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Data remapping

Associate: Each of the values found in the file for the field **Associate** must be mapped to an existing **Associate**. If the import values match, then the remapping will be completed automatically. Correct each import associate value by selecting it, then selecting the correct associate from the **Use value** drop down list and clicking the **Set** button.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.5 Consultants

Consultants are your people who manage the project and interact with the associates.

8.5.1 Entering consultants

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Consultants**.
- Search for consultants in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter consultants.

The consultant name is the only thing required, but you may with to enter phone and email details so they are available for use in templates as merge fields.

8.5.2 Importing consultants from a csv file

If you have consultant data in a CSV file, it is possible to import this data.

This topic describes the process of importing a CSV consultant file.

Read the topic Consultant import (CSV) file format[241] for more information on the file contents allowed.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Consultants**.

Importing data

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.6 Suppliers

Suppliers are the companies from which inventory is purchased.

8.6.1 Entering suppliers

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Suppliers**.
- Search for suppliers in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter suppliers.

The supplier name would normally be the supplier's company name. You may choose to enter supplier codes if your other systems use codes.

Fields are provided for a postal address and a delivery address and on the notes tab you may record any amount of notes about the supplier.

8.6.2 Importing suppliers from a csv file

If you have supplier data in a CSV file, it is possible to import this data.

This topic describes the process of importing a CSV supplier file.

Read the topic Supplier import (CSV) file format 253 for more information on the file contents allowed.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Suppliers**.

Importing data

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.7 Inventory

Inventory is all items you may add to a project. While project specific inventory items are catered for, it is strongly advised that you add items to the global inventory described here if the item is something that you would supply on more than one occasion.

8.7.1 Entering inventory

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Inventory**.
- Search for inventory in the same manner that other ProMaster Hardware searches are performed.

Inventory search has a large number or options to assist in narrowing the search results returned when you have many thousands of items. Over in the top right the **Advanced** link turns on or off the advanced search choices to give you a choice between a simpler search screen and more capabilities.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter inventory sets.
- Right click on an item to get the choice to duplicate the highlighted item. This is useful for entering items that are substantially similar (e.g. differ only by part code and finish).

Like other areas of ProMaster Hardware, data fields are clearly labelled to indicate their purpose, however there are a few items that need a little explanation.

Explanation of data fields

Part code: The part code must not be the same as any other part code.

Details tab

Unit: This is a text field that allows you to add an annotation so advise users how the item is supplied.

Weight and **Volume**: In Kg and m^3 respectively, these are used in shipments to give additional packaging data to the user.

Get product prices each time this product is used: Indicates that the stored price should not be relied on and that the scheduler should seek a new price.

Product price date: The date when the product cost and retail were last updated.

Standard markup: Used in quotes to force a markup instead of that which the scheduler might set for all items.

Ship item individually: Copied into the similarly named setting when the item is made available to a project, it is used to separate products that are bulky and would normally be shipped in their own boxed instead of being packaged with the other items for a door. Typically this is used for door closers.

Item is supplied by another party: Copied into the similarly named setting when the item is made available to a project, it is used to put the item onto a door in advanced mode allowing it to be installed without being supplied.

Record sizes for finishing this item: Copied into the similarly named setting when the item is made available to a project, it is used to indicate that dimensions need to be recorded and finishing (i.e. trimming to the dimensions entered) is required. Typically this is used for kick plates.

Default fro dryfit: Copied into the similarly named setting when the item is made available to a project.

Default for install: Copied into the similarly named setting when the item is made available to a project.

Default for finishing: Copied into the similarly named setting when the item is made available to a project.

Image tab

There are several ways of loading an image for your inventory item:

Load: Allows you to select an image to load from your computer. After you choose an image to load you are taken to the image editor to make any changes necessary and to resize the image if it is too large.

Link: Allows you to re-use an image that is already loaded against another inventory item. You are required to select an inventory item that has an image.

Scan: Captures an image from your scanning device. After you scan the image you are taken to the image editor to make any changes necessary and to resize the image if it is too large.

Paste: If an image is available on the clipboard as a bitmap, the paste option is available. After you paste the image you are taken to the image editor to make any changes necessary and to resize the image if it is too large.

Clear: Removes the image from the inventory item. If the image is used by other items it will remain on the other items.

Edit: Allows you to edit the image. See Image editor 274 .

> Sharing an image among inventory items by linking has several advantages. We recommend that you use the link image capability when appropriate. Advantages include: (a) Any subsequent change you make to the image is reflected in all places. (b) Storing the image only once reduces your database size and hence improves performance. (c) Storing the image only once reduces the size of project export files. (d) It is less work to link to an existing image than reacquire an image or re-scan a document.

Documents tab

Up to 4 documents may be stored for each inventory item. The classifications are:

Specification sheet: intended to contain comprehensive item data so the purchaser or specifier has complete knowledge of the product.

Installation instructions sheet: Comprehensive installation instructions for the item. The installation instructions may be included with an installation request so the installer is made aware of any installation procedures that may affect product security or reliability.

Product description sheet: Intended for an overview of the item where the detail in the specification sheet is not necessary.

Application notes sheet: Intended for documents containing information about the use of the item, less specific than the specification sheet but more detailed than the overview provided by a product description sheet.

Functionality:

View: Opens the document in your PDF reader (Typically Acrobat Reader)

Load: Allows you to select a document from your computer.

Link: Allows you to re-use a document that is already loaded against another inventory item.

Clear: Removes the document from the inventory item. If the document is used on other items it will remain on the other items.

Rating tab

If you wish to cross reference inventory against suitable ratings (see Inventory ratings 54), place a check mark against the suitable ratings. See also Ratings 70 .

Families tab

Any families that the inventory item belong to are shown. You may add the inventory item to an existing family, remove it from a family or create a new family. See also Entering inventory families 78 .

Sets tab

Any sets that the inventory item belong to are shown. See Entering inventory sets[77] .

Add also tab

Allows you to specify items, and the quantity of each that should be added to a door when this item is added. The add also information is copied into your project with the inventory item and after that each project may modify the add also information for its own use.

Notes tab

Any amount of notes may be recorded against an inventory item. Be mindful of the length and layout of your notes if you intend them to be printed as part of a project legend.

8.7.2 Duplicating inventory

Frequently you may want to add several inventory items that are substantially similar, for example differing only in the part code and finish.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Inventory**.
- Search for inventory in the same manner that other ProMaster Hardware searches are performed.
- With the inventory item that you want to duplicate highlighted, choose the **Duplicate** option from the **list's popup menu** or from the **More tasks** link.
- Most information is copied from the existing item to the new item. Enter a new part code and make any other changes before saving the new item.

  > Part code, supplier part code and manufacturer part code are not duplicated

8.7.3 Bulk change inventory

Often there is a need to make the same change to several inventory items. This is facilitated by the **bulk change** operation.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Inventory**.
- Search for inventory in the same manner that other ProMaster Hardware searches are performed.

  > Enter search criteria that will find all the items you want to change, but preferably no other items.

- Choose the **Bulk change** option on the **More tasks** list.

Making a change

The bulk change operation is performed by:

- Selecting the items you want to act on (either all or select items individually).
- Choosing the **data type to change** from the drop-down list .
- **Choose the new value to set** - the options available depend on your selection for the **data type to change**.

- Applying the change to the selected items by clicking the **Apply change** button.

Recheck your new values and also which items are selected before applying your change.

Notes

- The selected change is applied only to items that are checked (in the leftmost column of each item).
- You may check and uncheck items individually, use the buttons to select all or de-select all, or right click on the list for more selection options.
- You may make as many different changes as you like, and changes are stored until you click the **OK** button, at which time they are made permanent.
- When changing notes, images and documents, this is done by copying the information from another inventory item. When changing the image or a document, the selected inventory items are linked to the same image or document (i.e. they are shared). Certain operations that form cyclic operations are disallowed in a single bulk change operation. E.g. Item "A" copies notes from item "B" and item "B" copies notes from item "C" is not allowed in a single bulk change.

8.7.4 Ratings

Ratings are used to define the purposes for which an inventory item is appropriate. Ratings may be set while editing inventory items, but it is more practical and faster to use the inventory rating matrix to change the rating for multiple items at the same time.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Inventory**.
- Search for inventory in the same manner that other ProMaster Hardware searches are performed.

Enter search criteria that will find all the items you want to change, but preferably no other items. Clearly there is little point in selecting an individual item for this task, as that could be done while editing inventory. Likewise, showing all inventory would make the job of defining suitability an impossibly complex task.

- Choose the **Rating** option on the **More tasks** list.

Making a change

The options menu provides a number of choices for controlling the appearance and highlighting items that are not assigned.

Changing individual points

The ticked state of each intersection point can be changed by:

- Clicking the point with your mouse
- Move to the desired intersection point with your keyboard press the **space key**.

Changing blocks of points

Changing individual points is one thing, but the fundamental purpose of the matrix is to change whole blocks at a time. To do this:

- Navigate to the one corner of your block.
- Hold down the **shift** key while navigating to the diagonally opposite corner of your block with the **arrow keys**.

The block is shown in pale blue.

- Use the **space key** to toggle the block on or off.

When you are happy with your changes, click the **OK** button to save your changes.

8.7.5 Importing inventory from a csv file

If you have inventory data in a CSV file, it is possible to import this data.

This topic describes the process of importing a CSV inventory file.

Read the topic Inventory import (CSV) file format246 for more information on the file contents allowed.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Inventory**.

Importing data

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Data remapping - Type

The import wizard allows you to re-map the data in the import file onto the values available in the database. Each of the values found in the file for the field **Inventory type** must be mapped to an existing **Inventory type**. If the import values match, then the remapping will be completed automatically. Correct each import inventory type value by selecting it, then selecting the correct inventory type from the **Use value** drop down list and clicking the **Set** button.

Data remapping - Brand

The import wizard allows you to re-map the data in the import file onto the values available in the database. Each of the values found in the file for the field **Brand** must be mapped to an existing **Brand**. If the import values match, then the remapping will be completed automatically. Correct each import brand value by selecting it, then selecting the correct inventory type from the **Use value** drop down list and clicking the **Set** button.

Data remapping - Finish

The import wizard allows you to re-map the data in the import file onto the values available in the database. Each of the values found in the file for the field **Finish** must be mapped to an existing **Finish**. If the import values match, then the remapping will be completed automatically. Correct each import finish value by selecting it, then selecting the correct inventory type from the **Use value** drop down list and clicking the **Set** button.

Data remapping - Supplier

The import wizard allows you to re-map the data in the import file onto the values available in the database. Each of the values found in the file for the field **Supplier** must be mapped to an existing **Supplier**. If the import values match, then the remapping will be completed automatically. Correct each import supplier value by selecting it, then selecting the correct inventory type from the **Use value** drop down list and clicking the **Set** button.

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.7.6 Importing inventory images from a csv file

If you have inventory image data in a CSV file, it is possible to import this data.

This topic describes the process of importing a CSV inventory image file and the associated images.

Read the topic Inventory image import (CSV) file format249 for more information on the file contents allowed.

> The folder from where the pictures are loaded is the folder that contains the CSV file you are importing and then a sub folder **InvImage**

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Inventory**.

Importing data

To import data from a csv file, click on the **More tasks** link then choose **Import images from csv file.**

A simple wizard steps you through the import process.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

This step may take a moderate amount of time so be patient.

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.7.7 Importing inventory documents from a csv file

If you have inventory document data in a CSV file, it is possible to import this data.

This topic describes the process of importing a CSV inventory document file and the associated documents.

Read the topic Inventory document import (CSV) file format 245 for more information on the file contents allowed.

The folder from where the documents are loaded is the folder that contains the CSV file you are importing and then a sub folder according to the type of document import being performed.

For specification documents the files must be in a sub folder called **InvDocSpecSheet**
For installation documents the files must be in a sub folder called **InvDocInstallSheet**
For product description documents the files must be in a sub folder called **InvDocDescriptionSheet**
For application notes documents the files must be in a sub folder called **InvDocAppNotesSheet**

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Inventory**.

Importing data

To import data from a csv file, click on the **More tasks** link then choose one of 4 choices for **Import document from csv file** according to the type of documents you have.

A simple wizard steps you through the import process.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

This step may take a moderate amount of time so be patient.

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.7.8 Importing inventory active/inactive from a csv file

It is possible to bulk change inventory items to active or to inactive by importing a file containing part codes.

This topic describes the process of importing a CSV inventory active/inactive file.

Read the topic Inventory active/inactive import (CSV) file format 244 for more information on the file contents allowed.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Inventory**.

Importing data

To import data from a csv file, click on the **More tasks** link then choose **Import active/inactive from csv file.**

A simple wizard steps you through the import process.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The operation specifies if the imported part codes become active or inactive in your database.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.7.9 Importing inventory part code change import from a csv file

If you have inventory part code change data in a CSV file, it is possible to import this data.

This topic describes the process of importing a CSV inventory part code change file.

Read the topic Inventory part code change import (CSV) file format 249 for more information on the file contents allowed.

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Inventory**.

Importing data

To import data from a csv file, click on the **More tasks** link then choose **Import part code change from csv file.**

A simple wizard steps you through the import process.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

8.8 Inventory sets

Inventory sets group together several inventory items, each with a quantity. Inventory sets may be copied into a project (you may also create sets in the project that are not copied from the global inventory sets). Within a project, inventory sets are used to add collections of items to a door in a single operation.

8.8.1 Entering inventory sets

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Inventory sets**.
- Search for inventory sets in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter inventory sets.

The set name uniquely identifies the set.

While adding or editing an inventory set, use the **Add** and **Remove** buttons to select a new inventory item to add to the set or to remove the highlighted inventory item. The quantity of each item may be changed and the items may be sorted into your preferred order. Changes to inventory items are indicated with graphics beside the items.

> The order of items in the set are a visual aid only for viewing the set. Ultimately when inventory sets are copied into a project then added to doors, the order of items is determined by the inventory sort order chosen for the project.

8.9 Inventory families

Inventory families are provided as a mechanism through which you can group together products that have similar characteristics so you can easier identify them when adding inventory items to a project. It is expected that inventory families will not be used for mainstream products but for niche products that are used infrequently but where visual characteristics will be of importance to the consumer.

8.9.1 Entering inventory families

Getting started

- You must be logged in as the **admin** user or a user with permissions to edit this data
- From the **Setup and Admin** menu, select **Inventory families**.
- Search for inventory families in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter inventory families.

The family name uniquely identifies the family.

While adding or editing an inventory family, use the **Add** and **Remove** buttons to select a new inventory item to add to the family or to remove the highlighted inventory item. Changes to inventory items are indicated with graphics beside the items.

8.10 Exporting data

This section describes how to get "back out" various sorts of parameter or non-project data so that you may share it with others or or manipulate it (e.g. using Microsoft Excel) before re-importing it.

8.10.1 Exporting parameter data to a csv file

Getting started

- You must be logged in as a user with permissions
- From the **File** menu, select **Export** then **Export parameter data (CSV)**.

A simple wizard steps you through the process of choosing where the data will be written, choosing which data to export and choosing export options.

Multiple types of data may be exported at the same time. Each type of data is written to a separate file, named according to the type of data.

> When choosing the range of data to export, you may right click on the list for selection options. The types of data are defined in logical groups allowing you to select or deselect the whole group in a single operation.

Notes

When exporting inventory images and inventory documents, CSV files are produced and the data files for the images and documents are written to sub folders beneath the export location.

Clearly any notes that are stored in rich text format (E.g. supplier notes, inventory notes) are not suitable for exporting to a CSV file and these data fields will not be included in the export.

8.10.2 Exporting inventory specified quantities to a csv file

This export is used for evaluating product quantities for negotiating pricing etc. The quantity is that specified on each door in the selection. Projects are included in the calculation when they are in progress or complete (but not lost, snapshot or cancelled)

Getting started

- You must be logged in as a user with permissions
- From the **File** menu, select **Export** then **Export inventory specified quantities (CSV)**.

Exporting data

Range

Choose the range of data to be analysed by choosing a date range, inventory type and/or inventory brand.

Destination

Choose the destination for the data file.

Options

The **Show quantities by consultant** option modifies the output to show product quantities by main consultant.

8.10.3 Exporting quote values for associates to a csv file

This export looks at quotes in a specified date range that are released or accepted, and outputs associated information about the project, quote and associate. Projects are included in the calculation when they are in progress or complete (but not lost, snapshot or cancelled)

Getting started

- You must be logged in as a user with permissions
- From the **File** menu, select **Export** then **Export quote values for associates (CSV)**.

Exporting data

Range

Choose the range of data to be analysed by choosing a date range and one or more associates.

Destination

Choose the destination for the data file.

Options

The **Include quotes for variations** determines if only main contract quotes are output or if variations are included.

8.10.4 Exporting project management data to a csv file

Getting started

- You must be logged in as a user with permissions
- From the **File** menu, select **Export** then **Export project management data (CSV)**.

A simple wizard steps you through the process of choosing where the data will be written, choosing which data to export and choosing export options.

Multiple types of data may be exported at the same time. Each type of data is written to a separate file, named according to the type of data.

> When choosing the range of data to export, you may right click on the list for selection options. The types of data are defined in logical groups allowing you to select or deselect the whole group in a single operation.

8.10.5 Exporting quote value and margin to a csv file

Getting started

- You must be logged in as a user with permissions
- From the **File** menu, select **Export** then **Export quote value and margin (CSV)**.

Exporting data

Range

Choose the range of data to be analysed by choosing a date range and other options.

Destination

Choose the destination for the data file.

8.11 Importing data

8.11.1 Importing project status from a csv file

If you have project status data in a CSV file, it is possible to import this data.

This topic describes the process of importing a CSV project status file.

Read the topic Project status import (CSV) file format 252 for more information on the file contents allowed.

> The status of many projects may be changed in a single operation. Be very careful. The project status may only be changed from "Entering". It may be changed to "Complete", "Cancelled" or "Lost". The import runs as the "admin" user and therefore does not check project permissions. Be certain not to run this process while any project you are altering is being used by another user.

Getting started

- You must be logged in as the **admin** user
- From the **File** menu, select **Import** then **Import project change status (CSV)**.

Importing data

A simple wizard steps you through the import process.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

Using ProMaster Hardware

Part 9

9 Using ProMaster Hardware

This section covers all information about managing projects.

9.1 Getting started

9.1.1 Logging in ProMaster Hardware

To perform any tasks in ProMaster Hardware, you must first log in by providing your login name and password. The environment option is available only for users who connect to more that one ProMaster Hardware installation (it is normal to have only one choice for the environment)

9.1.2 Changing your password

If your user account is configured to integrate with Windows or Active Directory security then passwords are not controlled by ProMaster Hardware and this topic is not applicable to you.

Each time a user account is created, the user is assigned the default password which is the word **password**. When a user logs in, the new user user is required to change their password.

At any time after logging in, the user may change their password.

Getting started

- You must be logged in.
- From the **Setup and Admin** menu, choose **Change password**.

Making a change

You must enter your old password then enter your new password twice.

9.1.3 Setting your preferences

Various characteristics of ProMaster Hardware may be configured to the liking of the user.

Getting started

- You must be logged in.
- From the **Setup and Admin** menu, choose **Preferences**.

An explanation of preferences

Display inventory images

Normally inventory images will be displayed. If you are operating on a slow network you may turn off the display of inventory images to improve performance.

For how many seconds should alert messages be displayed?

Some areas of the program use repetitive procedures, such as adding doors. After each item is added, a message is displayed to alert you to the action that has just taken place. This option determines the duration for which these messages will be displayed.

Auto find

Various areas in ProMaster Hardware allow you to search for information. When each of these search windows is opened, whether or not all information is shown is controlled by each of the auto find options. On some search windows, particularly those where only a few items are displayed, having auto find on is useful, but when there are many items to be displayed, such as for doors, is is better to leave auto find off and perform a search using criteria to identify the items you want to see.

Find warnings

On some areas in ProMaster Hardware, a find without any search criteria to limit the number of items returned may take some time and return so many items that is is not useful. On those search windows, you are prompted to confirm that you intended to return all information. The warning message may be suppressed by turning off the corresponding warning.

Email

Three options are provided for how email messages will be delivered. Depending on what email application you are using and how it is configured you may determine that one option is better than the others. If you are using an SMTP server to deliver your email (rather than delivering it to your mail application) then you must provide the SMTP mail delivery settings.

Door search

The various door search options determine what will be displayed when searching for doors.

Door entry

The various door entry options determine if values are copied from the previous door when adding a new door, and also which values are copied.

Key entry

The various key entry options determine if values are copied from the previous key when adding a new key, and also which values are copied.

Report stretching

For each type of information on reports, a pre-determined width is allocated. This gives the best balance between the various pieces of information shown. If the information cannot fit in the allocated space, it will automatically stretch down the report. You may use these options to determine for each type of data if it will be allowed to stretch on the reports. If stretching is disabled for a type of data and it is not able to fit then it will be truncated on the report. Generally some types of data (e.g. Project number, Door number, Inventory part code) should always be allowed to stretch as truncating them makes little sense, while other types (e.g. Frame type, Frame finish) would be ok to truncate.

Report columns

The standard widths on reports of various types of information may be adjusted. Separate settings are provided for short codes and long codes. The allowable range for each setting is bound by an upper and lower constraint. Care should be taken when adjusting these values to check the outcome on all reports.

9.1.4 Printer setup

ProMaster Hardware remembers the printers you select and each time you print it automatically selects the correct printer.

Getting started

- You must be logged in.
- From the **Setup and Admin** menu, choose **Printer setup**.

Changing printers

There are three printers that can be configured.

For each printer, choose the name of the printer then choose the paper tray which holds plain paper. If you have a printer with a single paper tray, or if all paper trays hold plain paper then you may leave the paper tray selection as **Default**.

Standard printer

This printer is used for almost everything, and for most users it will be the only printer used. If your printer supports duplexing, the option to print on both sides of the paper will be available.

Large format printer

This printer is used only for the doors report that uses the layout **Keying matrix - large format**.

Label printers

Various label printers are defined to allow you to specify a different printer for each type of label that ProMaster Hardware can produce. This allows you to have more than one printer, each loaded with a different label stock (e.g. A large label for Shipping door labels, A small non-permanent label for Install door labels etc).

9.1.5 Spelling preferences

ProMaster Hardware includes a comprehensive spell checked with several dictionaries.

Getting started

- You must be logged in.

From the **Setup and Admin** menu, choose **Spelling preferences**.

Changing preferences

The options are self describing and will be familiar to Microsoft Office users. The second tab, **Language**, is where you choose the standard dictionary (E.g. English British) and where you may specify additional dictionaries including other languages, medical terms and technical terms.

9.1.6 Searching for data

All search screens in ProMaster Hardware have a number search parameters at the top.

Searches are performed by entering any search information you have and clicking **Find** (Or pressing **Enter** as the **Find** button is the **default** button when you are entering the search parameters.)

Many search parameters have a search modifier that controls the way the search is performed.

> All search parameters you enter must be met for any item of data to be considered a match, so enter enough information to refine your search, but not so much that you exclude items you want to see.

After you perform the search, you are placed on the list of results where you can move up and down with the arrow keys then perform any action allowed on the selected item.

See Setting your preferences 84 for information about **auto find** and **find warnings**.

9.2 Working with projects

The foundation of a project is of course to define the project.

This section teaches you about creating projects, opening projects and other project related activities.

9.2.1 Creating a project

To create a new project, you are stepped through a number of questions. After the project is created and information entered is able to be altered so there is no necessity to be concerned about information you may not know at the time of creating the project.

Getting started

- You must be logged in without a project open.
- From the **Project** menu, select **New project**

The **New Project** wizard gathers information from you then creates a new project and immediately opens the project so you may work on it.

After the project is created then you may proceed to alter any of the information you entered into the wizard, add doors and their inventory items, create quotes etc.

Explanation of data fields

Project identification and consultant

Data field	Description
Project No	The **project number** is a value that uniquely identifies a project. You can enter any value you like for the project number, but unless you have a good reason to do otherwise, the best option is to use a logical way of numbering your projects. The **Generate next project number** link is used to assist in making the next project number. Here's how it works: • You will be asked if the **project number** has a prefix "Starting characters". If you do use prefixes (such as a different prefix for different construction companies) then you enter that prefix. • ProMaster Hardware looks for the greatest project number that already exists by looking in a dictionary manner. • The highest project number that is found is taken, incremented and offered as the new project number.
Description	The **description** is fundamental to identifying the project and hence you should use a complete and accurate description.
Main consultant	The main consultant is the primary person within your company who is consulting on this project. The corresponding **Edit consultant** link gives access to maintain the global list of consultants. Projects may have as many consultants as you require, and after creating the project with just the main consultant you may add more consultants, change the order they appear and designate a different consultant as the main consultant. See Editing project details 91 for more information. During the new project wizard, you must select one consultant to be the project's main consultant.

Site address

The site address is not mandatory, but is important for keeping accurate records so it is recommended that you enter complete address information.

The drop down lists for city, state and country allow you to choose from values used in other projects without the need to retype them.

Associates

A project must have at least one associate. You may add as many associates as you require to a project and change the order in which they appear.

An associate may be designated as the default for quotes, variations, installations or claims. See Project associates 91. By designating an associate as the default for a type of activity, the associate is automatically selected when performing that activity.

Delivery address

The delivery address (and contact name and phone number) is used as the default when creating a shipment. The delivery address is not mandatory, but if multiple shipments will be created for a project it is easier to define the shipping address for the project rather than on each shipment.

Options are provided to copy the site address or an associate address into the delivery address.

Project information

Data field	Description
Date completion required	The date that the project must be completed by.
Allow dryfit	Turns on dryfit capability for the project. If turned off, dryfit is unavailable and hidden from all reports and on screen.
Allow installation	Turns on install capability for the project. If turned off, installation is unavailable and hidden from all reports and on screen.
Allow finishing	Turns on finishing capability for the project. If turned off, finishing is unavailable and hidden from all reports and on screen.
Use short code for inventory part code	If on, project inventory short codes (see Adding project inventory) 96 are used in preference to inventory part codes.
Use short code for inventory type	If on then if you elect to print inventory types on any reports then the short code will be used.
Use short code for inventory finish	If on then if you elect to print inventory finishes on any reports then the short code will be used.
Show inventory brand	Default for whether reports show inventory brand or not.
Show inventory finish	Default for whether reports show inventory finish or not.
Use short code for door handing	If on then if you elect to print door handings on any reports then the short code will be used.
Use short code for door type	If on then if you elect to print door types on any reports then the short code will be used.
Use short code for door finish	If on then if you elect to print door finishes on any reports then the short code will be used.
Use short code for frame type	If on then if you elect to print frame types on any reports then the short code will be used.
Use short code for frame finish	If on then if you elect to print frame finishes on any reports then the short code will be used.
Rating country	The country that the project belongs to for door and inventory rating purposes. Optional.
Project rating	The specific rating that is applied to all doors that do not have a rating specified. Optional.
Account	The account number to show when making a claim for the project. This is available as a merge field on claims.
Retention on product	The percentage retention agreed for the supply of product. This is used by some of the merge fields on claims.

Retention on install	The percentage retention agreed for the install of product. This is used by some of the merge fields on claims.

Retentions

Data field	Description
Calculation	Determines how retentions will be computed when making a claim. Two sets of retention rates are allowed and the calculation determines which parts of the claim use rate 1 and which use rate 2. For all but one of the calculations rate 2 is not used.
Retention	The percentage for claim amounts from 0 to Break 1.
Break 1	The point above which "Retention from break 1" is used instead of "Retention"
Retention from break 1	The rate to use from Break 1 to Break 2
Break 2	The point above which "Retention from break 2" is used instead of "Retention from break 1"
Retention from break 2	The rate to use from above Break 2
Maximum retention	The maximum amount of retention. If the cumulative retention exceeds this number then it is capped at this number.
Project completion	The expected completion date for the project. The portion of the retention defined by "Completion proportion" is expected on this date.
Completion proportion	The portion of the retention expected on project completion.
Final refund	The date at which the outstanding part of the retention is expected.

The retention refund numbers are not used for any calculations and do not appear on any reports. They are provided for your records and for use by customers who write their own reports.

Forecast

Allows you to record a date when you expect to receive the revenue from this project and the probability you believe that you have of winning the project.

Extra information

Allows you to record additional data for the project that can appear on quotes, claims etc. See Project extra data 92.

Project notes

You may record any information about the project you require for internal purposes. Project notes are not printed on any reports.

Right click on the notes for more choices.

- Replace text with template - Choose a new template to replace the notes text. To create templates, see Templates 60.
- Insert paragraph - Insert a predefined paragraph at the cursor position. To create paragraphs, see Templates 60.

There is an option to show the notes when the project is opened.

Door types

You may add global door types to the project. To alter door types after creating the project or add door types specific to the project, see Door types 116.

Door finishes

You may add global door finishes to the project. To alter door finishes after creating the project or add door finishes specific to the project, see Door finishes 117.

Frame types

You may add global frame types to the project. To alter frame types after creating the project or add frame types specific to the project, see Frame types 119.

Frame finishes

You may add global frame finishes to the project. To alter frame finishes after creating the project or add frame finishes specific to the project, see Frame finishes 120.

Handings

You may add global door handings to the project. To alter handings after creating the project or add handings specific to the project, see Handings 114.

Inventory sets

You may add global inventory sets to the project. To alter inventory sets after creating the project or add inventory sets specific to the project, see Project inventory sets 101.

Inventory items

You may add global inventory items to the project. To alter inventory items after creating the project or add inventory items specific to the project, see Adding project inventory 96.

Various values are required for each inventory item which specify how appears and how it is used in the project. See Adding project inventory 96 for an explanation.

9.2.2 Opening a project

To work on a project, other than when you create the project, you must first open the project.

Getting started

- You must be logged in without a project open.
- From the **Project** menu, select **Open project**

Searching

Search for projects in the same manner that other ProMaster Hardware searches are performed.

The project number and description fields have search modifiers that alter the way the search is performed.

The address search is performed a little different to most other searches in that instead of matching all the text you enter as a single entity, it looks for all the individual words you enter to appear in the address, but not specifically how you entered them.

By default, only active projects are located. To find cancelled, complete, lost or snapshots you must turn on the option to allow the extended search.

By default, archived projects are not included in the search results. To find archived projects also you must turn on the option to allow archived projects in the search.

Notes

You may right click on the results for some more functionality.

Menu option	Description

Details	Shows additional information about the project to help you determine if it is the project you are attempting to find without the need to open the project then close it if it was the wrong project.
Find all projects in the same group	When you create a project snapshot, and optionally when you duplicate a project, the projects are added into the same project group. After finding a project, you may use this option to re-run the search and find all projects in the same group.
Copy list to clipboard	The list of projects found by your search is copied to the clipboard in CSV format for use within another application.

9.2.3 Editing project details

Any or the project information you entered when creating a project may be modified.

Getting started

- You must be logged in with a project open.
- From the **Project** menu, select **Modify project**

Making a change

Much of the information is explained in the topic Creating a project 87 so that will not be repeated here.

On the **Details** tab the there is an option to **allow all users to open this project**. This was set when the project was created to the value set by your administrator in the Application parameters 37.

> A project may be opened by its owner, or anyone if the option **allow all users to open this project** is set, or anyone who has permissions to open all projects (see Users) 36.

On the **Project Information** tab, the options for allow dryfit, installation and finishing allow you to turn on or off these capabilities, however if any functionality has been used by doors then the corresponding option will be turned back on automatically.

On the **Associates** tab, the drop down lists allow you to record the QS and PQS (if indeed you ever find out). Annotations for QS and PQS are shown on the associate information on the front screen.

On the **Consultants** tab you may add more consultants to the project (during the project creation you added just the main consultant). See also Project consultants 92.

The **Information** tab shows the project group name and other projects in the same group.

9.2.4 Project associates

A project may have many associates recorded.

When you add an associate, you are actually adding the associate and the specific person who works for the associate.

For each associate you may specify if it is the default for quotes, variations, installations and claims. These defaults are used to automatically select the correct associate when those activities are performed.

You may sort the associates into your desired order.

The flag "won" allows you to record the associate who has won the contract prior to knowing if you have been awarded the contract from the associate. This shows on the quotes screen against the main contract quote for the associate.

The flag "lost" allows you to record that the associate has lost the contract (you may not yet know who won the contract) and therefore you have no interest in pursuing that associate.

9.2.5 Project consultants

A project may have many consultants recorded. Typically this is done simply to record a trail of people who have been involved in the project.

For documentation purposes you may add a description to each consultant. Only one consultant may be designated the main consultant, so if you mark one as the main consultant then the one previously marked as the main consultant is modified to be not-main.

You may sort the consultants into your desired order.

9.2.6 Project extra data

Project extra data defines non-specific information in name-value pairs. It may be set when a project is being created or at any time by editing the project details (see Editing project details) 91 .

When you add some extra data, you must enter a name and the corresponding value. Each name may be used only once for a project. Default names may be defined (see Project extra data names) 58 .

The value but not the name may be altered at any time. For each piece of data you may specify if it is included in the merge field data available in quotes, shipments, installations and claims.

You may sort the project extra data into your desired order.

9.2.7 Changing the project status

The project status determines if the project is able to be worked on, and also categories it so you know if it is active, cancelled etc.

Getting started

- You must be logged in with a project open.
- From the **Project** menu, select **Change project status**

Making a change

Choose the new status you want.

Choose if the project is to be flagged as **archived**. This is not available is the project is **In progress**.

If the project is **Lost**, you may enter a description about why it was lost. This information is shown on Report: Lost projects 225 .

Choose the date finalised if the project is **Lost**, **Cancelled** or **Complete**.

Notes

Here is an explanation of the project status values.

Status	Description
In progress	The project is able to be worked on.

Complete	Use this status to indicate that a project has run its course. All items are shipped and installed and claimed. A complete project may not be altered.
Cancelled	Use this status to indicate that a project did not progress because it was cancelled. A cancelled project may not be altered.
Snapshot	When you use the capability to make a snapshot of your project (see Creating a project snapshot) 93 , the snapshot is given this status. A snapshot project may not be altered, but you may wish to revert to it by changing its status to "In progress". If you do this you should also mark the previously active project as being a snapshot (or possibly even deleting it) so there is absolutely no confusion about which copy of the project you are working on.
Lost	Use this status to indicate that a project was lost to a competitor. This status is available only after the main contract is quoted but not accepted.

9.2.8 Creating a project snapshot

A snapshot is an exact copy of the project including all its activity and documents. There is nothing shared between the original project and the snapshot other than that they are added into the same group for easier identification. If you snapshot a project then make some changes which you then decided you didn't want, you could delete the live project, open the snapshot and change its status from snapshot to in progress and you would back where you were just prior to making the snapshot - with one slight difference.

As no two projects may have the same name, snapshots are named the same as the original project and carry a suffix SNAP1, SNAP2 etc. If you turn a snapshot project back into a live project, you should also alter its project number so that it appears identical to the original.

Getting started

- You must be logged in with a project open.
- From the **Project** menu, select **Create a snapshot of the project.**

Notes

A new project number will be offered for the snapshot. You may alter this if you wish but generally the generated name is adequate.

You should enter a snapshot description to indicate the time and purpose of the snapshot.

If the project is already in a group then the snapshot will be added to the group, otherwise a group will be created for both projects. The group name is of little importance and is automatically named after the project if possible.

9.2.9 Project alerts

Project alerts are messages that appear either always or after a particular date. They are shown at the bottom of the ProMaster Hardware main window when the project is open.

Alerts flagged to always show are always shown, provided you have not unselected the **Show this alert** flag.

Alerts set to show on and after a date show on that date, provided you have not unselected the **Show this alert** flag and only until they are flagged as acknowledged.

Where the alerts are shown at the bottom of the ProMaster Hardware main window, buttons step between the alerts and for alerts with a date, there is a button to acknowledge the alter so that it disappears.

Click on the alert description at the bottom of the ProMaster Hardware main window to open the alert so thay you may read its notes.

Getting started

- You must be logged in with a project open.
- From the **Project** menu, select **Alerts**.
- Search for alerts in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter alerts.
- Right click on an alert to access options for sorting the alerts. Sorting choices are available only if you have searched for all items.

Notes

The description is shown on the ProMaster Hardware main window.

Deselecting the **Show this alert** flag will, regardless of date choices, always hide the alert.

If the alert is to be shown only after a date, you must enter the date.

The **notes** are shown only when you open the alert

9.2.10 Duplicating a project

When a project is written with all the doors and door inventory, it is then quoted for the main contract. Multiple quotes may be created, each for a different associated and each priced differently if desired, but they must all contain all the items on the project.

If you wish to make a quote for part of the project, this is accomplished by duplicating the project to make a new project and on that new project having only the doors and items required. Then, on the new "duplicate" project, the quote for the main contract also contains all the items in that project.

The process described below could be achieved by creating a project snapshot, making that snapshot status "in progress" removing items from the new project and then quoting it, but that is somewhat more complicated than using the duplicate project function as it gives you a choice of which doors to duplicate.

After the duplicate project is created, the current project is closed and the duplicate is opened ready for you to work on it.

Getting started

- You must be logged in with a project open.
- From the **Project** menu, select **Create a new project from this project**

Making a change

New project parameters

You must enter a new project number for the new project.

You may leave the description the same, but often it would make sense to alter it to reflect the purpose of the new project.

You may choose if the new project is added into a group with the current project (normally it is best to do this).

You may choose to keep the original project creation date or change it to today's date.

Door selection

You may select which door types and/or areas do duplicate into the new project.

Options are provided for inventory and keys, and also for documents.

9.2.11 Deleting a project

Deleting a project is a permanent operation. There is no oops key.

Getting started

- You must be logged in with a project open.
- From the **Project** menu, select **Delete project**

Making a change

To avoid accidental deletions, you must enter the text that is displayed before you click OK to delete the project.

9.2.12 Project locks

ProMaster Hardware allows multiple users to work on a single project concurrently, but to ensure data integrity there is a locking model that prohibits users from making changes that would produce incorrect data.

The locking model is somewhat complex internally, but from a user perspective what happens is when an operation is started, ProMaster Hardware tries to acquire a suitable data lock. If it succeeds, the operation may proceed and the data is unlocked after the operation is complete. If it fails then you are notified that other users have data locked that prohibits you from continuing.

Some examples of data locks are:

- When you open a project, a shared lock is acquired on the whole project. If you cannot acquire a shared lock on the project because another user has an exclusive lock on the project then you are unable to open the project.
- When you create or alter a quote, an exclusive lock is acquired on the whole project. If you cannot acquire an exclusive lock because another user has the project open (and hence has a shared lock) then you may not proceed with the quote. This stops another user from making any change to the project that would invalidate your quote.
- When you edit a door, a shared lock is acquired on all doors and an exclusive lock on the particular door. This stops another user from editing the same door.
- When you add a door, an exclusive lock is acquired for all doors, prohibiting other users from making any door changes. By locking all doors, this allows ProMaster Hardware to alter the sorting of other doors as needed if you are attempting to insert new doors between existing doors.

These are just a few examples - there are hundreds of locking scenarios, but these examples should explain the concept.

If you want to view the locks held by other users, here is how:

Getting started

- You must be logged in with a project open.

- From the **Project** menu, select **Show users with this project open**
- You may **Refresh** the list to see changes as they occur.

Notes

The list of locks does not include your locks.

The list shows not only the type of lock held by another user but also the user name and the computer where the program is running and the time that the lock was acquired.

If ProMaster Hardware is terminated unexpectedly, such as powering off your computer without shutting down correctly, the user locks persist. There is an automatic clean-up process to remove locks that are do not belong to a logged in user and this process runs every time a user logs into ProMaster Hardware.

9.3 Working with project inventory

Project Inventory is the gathering together of global inventory items that relate to your project, and if necessary creating project specific inventory items.

Before an inventory item may be used within a project, it must be added to the project inventory list. You may choose to do this before you begin entering the doors on a project, or you may progressively build up the project inventory as you discover that you need additional items.

There are three ways that project inventory is accumulated.

- You can **Import Global** to make available items that are defined in the global inventory pool.
- You can **Import items from another project**. This allows you to easy select items, both global and project specific, that you have used before and to bring them into this project.
- You can **Add** a new project specific inventory item.

Notes

- Project inventory items are sorted, and that sort order persists throughout the project.
- Each item may be given a short code that may be used in place or as well as the part code.
- Each item has a number of attributes that control what happens when it is added to a door and when it is shipped.

This section covers all aspects of project inventory.

9.3.1 Adding project inventory

Getting started

- You must be logged in with a project open.
- From the **Project** menu, select **Project inventory**
- Search for project inventory in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Import global, Add**, **Remove** and **Properties** buttons to enter and alter project inventory.

To import global inventory items into the project, click **Import global**. You will be taken to a window to search for inventory items in your global database (See Inventory 66).

To create a project specific inventory item, click **Add**. Creating a project specific inventory item is much like creating a global inventory item, however there are fewer capabilities.

It is recommended that project specific inventory items are used only when absolutely necessary - not because you need an item that should be in your global database and the person who administers that is unavailable!

After you import a global item or create a project specific item, there are properties for the new item that when set correctly will make using the inventory within your project easier.

Explanation of data fields

Data field	Description
Short code	Specify a code for the product. This may be a part code you wish to use to obfuscate the real part code, or it may be that you want to use product codes to match up with architectural drawings and schedules. This defaults to the same as the part code. If short codes are not being used then it must still be entered (or leave the default value) but it will not appear anywhere. The short code may not be the same for two items.
Short code heading	This is used only on the legend report (see Report: Legend 215) and is used to form nice headings for the items. For example, "Closers", "Exit Devices".
Default for dryfit needed when adding this item to doors	The default for whether or not the item requires dryfit when being added to a door.
Default for install needed when adding this item to doors	The default for whether or not the item requires install when being added to a door.
Default for finishing needed when adding this item to doors	The default for whether or not the item requires finishing when being added to a door.
Default finishing note	The default for the finishing note when being added to a door.
Record dimensions for finishing	This flag makes available the functionality for recording finishing dimensions for the product, printing finishing work sheets, labels and associated functionality. An example of a product that requires finishing and requires dimensions recorded is kick plates. See also Working with finishing 144
Ship this item separately from other items	When product is packaged door-by-door for shipping, there are some items that are sufficiently large that they are not packaged with the other door items. Use this flag to specify that case. When this flag is set, the item is treated differently during shipment packaging (see Packaging a shipment 157) to make it easy to keep it separate from other items. Even when this flag is set you still have the capability to package the item with other door items, as you may want to do when only a few bits and pieces are shipped.
This item is supplied by another party	When this flag is set, adding the item to a door results in the item being treated in "advanced" mode, where the quantity supplied is different to the quantity installed, and the product quantity is set to zero and the item in the door is flagged as requiring installation.

Other functionality

By right clicking on an inventory item in the list, you may:

Menu option	Description
Duplicate project inventory	Duplicates the currently selected item (if it is a project specific inventory item) and places youin the editor ready to complete the details.
Add also	Allows you to define other items that will be added to your door automatically when this item is added. See Project inventory add also 101. An image in the list indicates if an item has "add also" information associated with it.
Prices	Allows you to define prices for the item at the project level that are then used within quotes. See Default project inventory prices 100.

	An image in the list indicates if an item has default price information associated with it.
Move up	Changes the order that inventory items will appear in the project. Available only when all items are being displayed.
Move down	Changes the order that inventory items will appear in the project. Available only when all items are being displayed.
Sort alphanumeric	Sorts the items according to the part code or short part code when short part codes are turned on for the project. Available only when all items are being displayed.
Sort alphanumeric (inventory type then item)	Sorts the items first by the order you have defined globally for your inventory types then according to the part code or short part code when short part codes are turned on for the project. Available only when all items are being displayed.

Click the **More tasks** link to:

Menu option	Description
Project inventory sorter	Opens a sorting window to allow more advanced sorting of the inventory items. See Sorting project inventory 99.
Import items from another project	Runs a wizard to select another project then inventory items from that project to bring into your project.
Remove all unreferenced project inventory items	Removes all inventory items that are in the project inventory list and are not used by the project (Doors, quotes, shipments etc). This can be used to clean up your project inventory very quickly but be careful not to use it between adding items to the project and using them on doors.
Import items from global definitions using list on clipboard	Reads the clipboard for a list of part codes and attempts to add them all to the project. Any items that could not be added because they are not global part codes will be reported.
Duplicate global inventory to make project inventory	Allows you to select a global inventory item which will then be copied to create a project specific inventory item.
Show usage of items	Shows each inventory item and the number of doors on which it appears (not the total quantity on the doors).

9.3.2 Project specific inventory items

To create a project specific inventory item, click **Add** on the project inventory window (See Adding project inventory 96). To alter a project specific inventory item, click **Properties** then click on the **Inventory details** link in the right top corner.

> It is recommended that project specific inventory items are used only when absolutely necessary - not because you need an item that should be in your global database and the person who administers that is unavailable!

Explanation of data fields

Part code: The part code must nut be the same as any other part code in the project.

Details tab

Unit: This is a text field that allows you to add an annotation so advise users how the item is supplied.

Weight and **Volume**: In Kg and m^3 respectively, these are used in shipments to give additional packaging data to the user.

Image tab

There are several ways of loading an image for your inventory item:

Load: Allows you to select an image to load from your computer. After you choose an image to load you are taken to the image editor to make any changes necessary and to resize the image if it is too large.

Scan: Captures an image from your scanning device. After you scan the image you are taken to the image editor to make any changes necessary and to resize the image if it is too large.

Paste: If an image is available on the clipboard as a bitmap, the paste option is available. After you paste the image you are taken to the image editor to make any changes necessary and to resize the image if it is too large.

Clear: Removes the image from the inventory item.

Edit: Allows you to edit the image. See Image editor 274 .

Notes tab

Any amount of notes may be recorded against an inventory item. Be mindful of the length and layout of your notes if you intend that they be printed as part of a project legend.

9.3.3 Sorting project inventory

Project inventory sorting is about getting the project inventory items in your project to appear in the order that you want them.

When you add project inventory, ProMaster Hardware stores the items in the order you added them. If you later add another project inventory item, ProMaster Hardware adds it at the end of the list.

Getting started

- You must be logged in with a project open.
- From the **Project** menu, select **Project inventory**
- Click on the **More tasks** link then choose the option **Project inventory sorter**

Making a change

The process of sorting project inventory involves selecting the items to sort then applying a sorting operation to those selected items. The process may be repeated as many times as necessary.

Selection and sorting operations are accessible through the button bar at the top of the window, through a popup context menu (right click mouse) and through various hot-key combinations.

Selecting items for sorting

There are various ways to select items. The help refers to key presses wherever possible, although you may choose to use the buttons or popup menu.

Task	**Procedure**
Select all items	Press **Ctrl+A**
De-select all items	Press **Ctrl+N**
Select to the end	Click on a item to highlight it. Right click your mouse and choose **Select to bottom**.
Select a range of items	Click on the first item then drag to the last item. or Click on the first item, hold down the Shift key, click on the last item.

Select scattered items	Click on the first item. While holding down the Ctrl key, click on the other items.

Sorting items

The sorting operations are applied to the selected items.

The sorting operations available are:

Sort operation	**Procedure**
Move up	Press **Ctrl+Up** Moves all the selected items up one position.
Move down	Press **Ctrl+Down** Moves all the selected items down one position.
Move up half page	Press **Ctrl+PgUp** Moves all the selected items up half the height of the window.
Move down half page	Press **Ctrl+PgDn** Moves all the selected items down half the height of the window.
Bring together	Press **Ctrl+B** Brings all the selected items together, positioning them under the topmost selected item.
Alpha sort	Press **Ctrl+S** Sorts the items according to the part code or short part code when short part codes are turned on for the project
Alpha sort (Inventory type order then item)	Press **Shift+Ctrl+S** Sorts the items first by the order you have defined globally for your inventory types then according to the part code or short part code when short part codes are turned on for the project

Select groups of items and then sort them as you want.

Finally, to save your changes click the **OK** button.

9.3.4 Default project inventory prices

When a project is quoted, the prices for the quote are stored with the quote. This does mean that prices may not be entered until such time as the door and door inventory data entry is complete and a quote is created.

To allow prices to be entered at any time and so they are then available for use by a quote when you create one, prices may be stored at a project level against each inventory item on the project.

It is not absolutely necessary to do this, you may choose to enter the prices only into a quote. Or alternatively, after creating a quote you may choose to copy the prices back into the default project inventory prices.

Also, when you duplicate a project (See Duplicating a project 94), quotes are not copied into the new project but default project inventory prices are copied, thereby making the prices available in the new project.

Getting started

- You must be logged in with a project open.
- From the **Project** menu, select **Project inventory default prices**
- Search for project inventory in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Properties** buttons to open the pricing window.

For each item you can set your cost and the retail price, choose how the price will be calculated (Markup from cost or Discount from retail) and then enter the percentage to apply or alternatively you may enter a price and the percentage will be computed from the price.

Options are provided to copy the global price information and and to clear the prices.

9.3.5 Project inventory add also

Add also links allow you to define rules that are applied when adding inventory items to a door. The rules allow you to specify one or more other items that are to be added. Each item may have a different quantity.

So, if item A has a rule saying add 3 of item B, then you add 2 of item A to the door, 6 of item B will be added also. The rules are applied only at the time of adding an item to the door, not if you subsequently alter the item or alter the rule.

Getting started

- You must be logged in with a project open.
- From the **Project** menu, select **Project inventory**
- Search for project inventory in the same manner that other ProMaster Hardware searches are performed.

Making a change

Right click on an item and choose **Add also**.

In the Add also window you may add and remove items, and alter the quantity of each before clicking **OK** to save the change.

You may enter a description, but this is for your purposes only - it is not used anywhere. On occasion it may be useful to annotate the **add also** rule.

A chain-link image on the inventory list indicates the presence of an add also rule.

9.3.6 Project inventory sets

Project Inventory Sets group together several inventory items with a quantity.

Project Inventory Sets are not required, but you may elect to use them to add several items to a door in a single operation.

When you add a set to a door, all the items in the set are added to the door, but there is no association between the set and the door. By this means, you may add several sets to a door to get the items from each set on the door.

Getting started

- You must be logged in with a project open.
- From the **Project** menu, select **Project inventory sets**
- Search for project inventory sets in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Import global, Add**, **Remove** and **Properties** buttons to enter and alter project inventory sets.

To import global inventory sets into the project, click **Import global**. You will be taken to a window to search for inventory sets in your global database (See Inventory sets 77). When you import a global set, the necessary items are added to your project inventory, so remember to revisit those items and check that the default values and short code are ok.

Sets must be named, and the name may not be repeated within the project. Notes can be stored against the set so you may document it.

In the Project inventory set window you may add and remove items, and alter the quantity of each before clicking **OK** to save the change. Items may be sorted within the group, but this is cosmetic only for the group as the items are sorted according to your project inventory sort order when they are added to a door.

Other functionality

Click the **More tasks** link to:

Menu option	Description
Duplicate	Create a new set, starting by duplicating the currently highlighted set.
Import items from another project	Runs a wizard to select another project then inventory sets from that project to bring into your project.
Show items	Shows or hides the items within each set.

9.4 Working with doors

Doors are the heart of the project. In this section you will learn about the process involved in entering doors, duplicating doors, duplicating areas, and applying bulk changes to doors.

9.4.1 Searching for doors

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Doors**
- Search for doors in the same manner that other ProMaster Hardware searches are performed.

On small projects, it is practical to find all doors then scroll down the list to the door you require. Not so when you are working with hundreds or even thousands of doors, as this way of operating becomes terribly inefficient as it is very time inefficient to peruse a long list to isolate a particular door. ProMaster Hardware offers a broad range of search criteria from which you may enter as little or as much information as you require, then click the **Find** button to show doors that match your criteria.

To explain the variation related search options:

"Door added" and "Door removed" search according to when the door was added or removed, irrespective of any inventory on the door.

"Inventory", "Inventory var. (variation)" and "Activity" operate together to for a search. If "Inventory" is selected and "Inventory var." is not selected then the search looks doors where the inventory item is on or has ever been on the door. If "Inventory var." is selected and "Inventory" is not selected then the search looks for any item either added or removed, according to "Activity", in that variation. If "Inventory var." is selected and "Inventory" is selected also then the search looks for that inventory item either added or removed, according to "Activity", in that variation.

For the purpose of "added" and "removed" on the "Activity" parameter, this considers with the product quantity has increased or decreased (but not necessarily decreased to zero) in that variation. It does not consider any change in dryfit, installation or finishing.

In the top right of the window, the **Advance** link turns on or off some additional search parameters.

Making a change

Use the **Add**, **Remove** and **Properties** buttons to enter and alter doors. See Entering doors[104]

When you add a door, it is added immediately after the highlighted door. See Setting your preferences[84] for settings that control how information is copied from one door to another when adding doors.

Click the **More tasks** link then **Show items** to show or hide the inventory list for the highlighted door.

Images in the list indicates if an door has notes, if it has extra info, if the door has been removed, it has has associated documents and it if has associated communications.

Removing a door in a variation

If you remove a door in the main contract, for the most part it will be completely removed. (The exception being when it is already used by other types of information such as communications and documents). However, when it comes to removing a door in a variation, the door is flagged as removed, the inventory items are reversed out, but the door still exists. This is very important as it is essential to track the history of items being added and removed.

There is also an option to reinstate a removed door. When a door is reinstated, it becomes available again (i.e. no longer flagged as removed), but the inventory items that were present then reversed out when the door remain as quantity zero, and you must edit the door to adjust the inventory as is now required.

Other functionality

By right clicking on an door in the list, you may:

Menu option	**Description**
Duplicate door	Allows you to duplicate one or more doors multiple times to create new doors. See Duplicating a door[110] .
Move up	Changes the order that inventory items will appear in the project. Available only when all doors are being displayed.
Move down	Changes the order that inventory items will appear in the project. Available only when all doors are being displayed.
Sort alphanumeric	Sorts the doors according to the door number. Available only when all items are being displayed.
Documents	Displays documents associated with the door and allows you to add new documents that will be associated with the door. See Working with documents[196] .
Communication	Displays communications associated with the door and allows you to add new communications that will be associated with the door. See Working with communications[195] .
Activity for this door	Shows activity for all inventory items on the door. See Door activity[114] .
Reinstate removed door	When a door is removed one of two things happen. If the door has no activity (quotes etc) then the door is removed completely. If the door cannot be removed because it has dependent activity, it is then marked as removed but remains part of the project. This option is available for doors marked as removed and it will reinstate the door so that it becomes part of the project again. There is an option to reinstate the door inventory also, to the state it was in immediately prior to it being removed.

Click the **More tasks** link to:

Menu option	**Description**
Bulk change	Make changes to multiple doors at the same time. See Bulk change doors[106] .

Door sorter	Opens a sorting window to allow more advanced sorting of the doors. See Sorting doors 107 .
Bulk change inventory items	Opens a wizard for making an inventory change to many doors at one time. See Bulk change inventory items 108 .
Bulk change installation and finishing	Opens a wizard for making an installation or finishing change to many doors at one time. See Bulk change installation and finishing 110 .
Duplicate area	Opens a wizard for duplicating an area to create more areas with the same doors. See Duplicating doors in an area 112 .
Remove doors in area	Opens a wizard for removing doors in an area. See Removing doors in an area 113 .
Keying matrix	Opens the keying matrix where relationships between doors and keys are defined. Only the doors that match your search are shown in the keying matrix. See Keying matrix 200 .
Import from CSV file	Import doors from a csv file. See Importing doors from a csv file 123 .
Import door renaming from CSV file	Import door renaming information from a csv file. See Importing door rename from a csv file 125 .
Import inventory from CSV file	Import door inventory from a csv file. The file may make changes to product quantities and also dryfit, installation and finishing. See Importing door inventory from a csv file 126 .
Import door extra info from CSV file	Import door extra information from a csv file. See Importing door extra data from a csv file 128 .
Show items	Show or hide the inventory list for the highlighted door
Show notes	Show or hide the door notes for the highlighted door

9.4.2 Entering doors

See the topic Searching for doors 102 to learn how to add doors.

The top of the doors window is information about the door. The tabs at the bottom give access to notes and additional data, but primarily is is the area where you record products and quantities for the door.

Explanation of data fields

Data field	Description
Door number	The number that uniquely identifies this door within the project. Each door has a unique door number.
Description	A description of the door to give it meaning beyond that attributed to the door number, preferably with no reference to the door number or area.
Area	The area is used to represent the physical location of the door. In a multi building project, the area should contain a reference to the building and to the level. You may type in a new area, or pick one used on another door within the system from the drop down list.
Stage	The stage is provided so you can record information to differentiate between the stages in a multi-stage project. In many places the stage is available as a search criteria.
Handing	The door handing.
Door type	Contains supplementary information about the door, such as its construction materials (e.g. Wood or Aluminium) and possibly also information about the

	density (e.g. Solid Core, Hollow Core)
Door finish	The door finish (e.g. materials and/or colour)
Frame type	Frame construction materials.
Frame finish	The frame finish (e.g. materials and/or colour)
Lock function	Additional information about the lock function.
Override rating	Any door that does not have a rating assigned will automatically be treated as the same rating as the overall project. If a door required a different rating, this is where you record it.
Stamping	Used only for export to ProMaster Master-Keying, this field carries the stamping that will be used when manufacturing cylinders and locks.
Is keyed	Used to indicate which doors contain a lockable product. Only doors flagged Is Keyed are able to have keys assigned to them. When exporting to ProMaster Master-Keying, it is the doors that are flagged Is Keyed that are exported.
Height	The height of the door. Useful if you have this information and wish to record it so you have it available later to assist in determining appropriate products.
Width	The width of the door. Useful if you have this information and wish to record it so you have it available later to assist in determining appropriate products.
Thickness	The thickness of the door. Useful if you have this information and wish to record it so you have it available later to assist in determining appropriate products.

Adding inventory to the door

Use the **Add**, **Remove** and **Properties** buttons to enter and alter inventory items on the door.

When selecting inventory, you may select a single item or multiple items.

For items with "add also" (see Project inventory add also 101), you will be prompted for the quantity of the item to add - this is so that that quantity may be applied to the "add also" items. Likewise if you select only one item you are prompted for the quantity and options but when you select multiple items they are added to the door with quantity 1, and the dryfit, install and finishing flags are set according to the project defaults for the inventory item.

Inventory items are displayed according to the sort order set for your inventory items (see Sorting project inventory 99).

Altering an inventory item

With an inventory item highlighted, you may right click to get choices for altering it - quantity, dryfit, installation and finishing (learn the keyboard shortcuts!). The toolbar provides the much of the same functionality.

In normal circumstances, an inventory item on the door has a quantity, and the dryfit, installation and finishing is either on or off, effectively making the quantity or dryfit / installation / finishing either zero or the same as the product quantity. When you are altering an item in the **Door Inventory** window, there is a link to switch to **advanced mode**. In advanced mode, the quantities of product, dryfit, istallation and finishing are completely independent. In advanced mode you can easily handle situations where the product is supplied by another party but you are performing the install. When you add an item that is flagged as "Supplied by another party" then it is added with quantity 0, install 1 and is put into advanced mode.

> Because in advanced mode you must control quantities for product, dryfit, installation and finishing yourself, it is recommended that you do not use advanced mode on items that do not require it.

When editing an item, the **Door Inventory** window shows a trail of each change to the item in the main contract and in each variation (see Working with variations 179). As you might expect, any change you make to an item is always applied in the current variation. For example, if you add an item in the main contract with quantity 1, then in a variation you change the quantity to 2 and turn on installation, the chargeable items in the variation are +1 for product and +2 for installation (the main contract had only +1 for the product).

Adding inventory items from a set

If you have defined inventory sets (see Project inventory sets 101), they will appear in the door window above and to the right of the inventory items. To add all items from a set, select it on the list and click **Add set**. If any of the items in the set already exist, the quantities of the existing item will be incremented by the quantity in the set. Adding a set to a door adds the items in the set, but there is no association maintained with the set, thus allowing you to alter both the door items and the set without side effects. items from multiple sets may be added to a door.

Creating a project inventory set from the door

If you add items to a door, then decide that those items would be useful in a set, click the **More tasks** button link then **Create inventory set**. The items from the door will be added to a new set. Give the set a name before saving it (see Project inventory sets 101).

Recording extra information

On the **Extra info** tab you may record any additional information about the door. Door extra data defines non-specific information in name-value pairs.

When you add some extra data, you must enter a name and the corresponding value. Each name may be used only once for a door. Default names may be defined (see Door extra data names 42).

The value but not the name may be altered at any time. You may sort the door extra data into your desired order.

Adding multiple doors

When you are adding doors, click **Save and add another**. ProMaster Hardware will save your door, leaving the window open for another door to be added, and some fields will retain the values you entered while others are progressed automatically (see Setting your preferences 84). When adding a whole bunch of contiguously numbered doors, this is extremely useful.

Editing multiple doors

When you are editing doors, the button **Save and edit next** is available if it is turned on in the preferences (see Setting your preferences 84). Click **Save and edit next and** ProMaster Hardware will save your door, then open the next door for editing.

9.4.3 Bulk change doors

Bulk changing is the process whereby you may apply the same change to a few or even many doors in a single operation. It is useful for changing a number of doors when you have entered them without this information or to rapidly fix data errors.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Doors**
- Search for the doors you want to include in the bulk change operation
- Click on the **More tasks** link then choose the option **Bulk change**

Making a change

The process of making a bulk change is very simple, just follow these steps.

- In the **Data type to change** drop down menu, choose what you want to change
- The options for what you may change depend on the selection made. Enter the information for your change (e.g. new value, selection, etc)
- Ensure that the correct doors are selected, selecting or deselecting them as necessary.
- Click the **Apply change** button.

Repeat these 4 steps as many times as you want.

Finally, to save your changes click the **OK** button.

Notes

- Within this window, the selected change is applied only to items that are checked (in the far left column of each item)
- You can check and uncheck items individually, or use the **Select all** and **Deselect all** buttons. Right click on the list for more selection options.
- You can make as many different types of changes as you like within this window.

Changes are stored in memory, and are not saved until you click the **OK** button.

9.4.4 Sorting doors

Door sorting is about getting the doors in your project to appear in the order that you want them.

Getting started

- You must be logged in with a project open.
- From the **Project** menu, select **Doors**
- Click on the **More tasks** link then choose the option **Door sorter**

Making a change

The process of sorting doors involves selecting the doors to sort then applying a sorting operation to those selected items. The process may be repeated as many times as necessary.

Selection and sorting operations are accessible through the button bar at the top of the window, through a popup context menu (right click mouse) and through various hot-key combinations.

Selecting doors for sorting

There are various ways to select items. The help refers to key presses wherever possible, although you may choose to use the buttons or popup menu.

Task	**Procedure**
Select all items	Press **Ctrl+A**
De-select all items	Press **Ctrl+N**
Select to the end	Click on a door to highlight it. Right click your mouse and choose **Select to bottom**.
Select a range of items	Click on the first door then drag to the last door. or Click on the first door, hold down the Shift key, click on the last door.
Select scattered items	Click on the first door. While holding down the Ctrl key, click on the other doors.

Sorting doors

The sorting operations are applied to the selected doors.

The sorting operations available are:

Sort operation	Procedure
Move up	Press **Ctrl+Up** Moves all the selected doors up one position.
Move down	Press **Ctrl+Down** Moves all the selected doors down one position.
Move up half page	Press **Ctrl+PgUp** Moves all the selected doors up half the height of the window.
Move down half page	Press **Ctrl+PgDn** Moves all the selected doors down half the height of the window.
Bring together	Press **Ctrl+B** Brings all the selected doors together, positioning them under the topmost selected item.
Alpha sort	Press **Ctrl+S** Sorts the selected doors by treating the door number as pure text. I.e. A dictionary sort is performed.
Numeric sort	Press **Ctrl+M** Sorts the selected doors in logical numerical order. All selected doors must have a numerical component in the door number. Each door number is broken into multiple numerical components and these are compared for sorting purposes. A numeric sort will correctly produce the sequence 1.1, 1.2, ..., 1.9. 1.10, 1.11, 2.1, 2.2, ..., 2.9, 2.10

Select groups of doors and then sort them as you want.

Finally, to save your changes click the **OK** button.

9.4.5 Bulk change inventory items

The Bulk Change Inventory wizard is the tool for making an inventory change to many doors at one time.

For example, perhaps you put just on handle on a door, then duplicated that door many times. Now you realise that there needs to be a handle on each side of the door. To make this change manually, you would need to visit each door and alter its inventory. With the bulk change inventory wizard you can make the change to all doors in one easy process.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Doors**

> Before doing a inventory bulk change, you must select which doors it is to act on. Inventory bulk change displays only the doors that are returned from a search, and from there you may individually select which of those doors to change

- Search for the doors you want to include in the bulk change inventory operation
- Click on the **More tasks** link then choose the option **Bulk change inventory items**

Making a change

Select actions

The first thing you must do is specify what you want to change. Depending on your choice of action, the options for what you act on will differ.

Here's what you can change:

What do you want to change	Description
Add an inventory item	Adds a new inventory item to each door. You must select the new item and quantity, and may specify dryfit, installation and finishing along with a note for each if desired.
Remove an inventory item	Removes an inventory item from each door. You must select the existing item.
Replace an existing item with another item	Changes an existing item to be another item. You must select the existing item and the new item.
Change the quantity of an item	Changes the quantity of an existing item. You must select the existing item and enter the new quantity required.
Add each inventory item in a set	Adds all inventory items in an inventory set to each door. You must select the inventory set.
Remove all items	Removes all inventory items from each door. Used only when a complete change of inventory must be applied to doors.

When complex changes are made to multiple doors, you need to understand what will happen under various circumstances.

The following table describes the behaviour you can expect from each type of change.

What do you want to change	How the change behaves
Add an inventory item	Adds the item to all selected doors. Any door that already has the item is not changed.
Remove an inventory item	Any doors that do not have the item are ignored. On all other selected doors, the item is removed if possible (if it is not in a prior variation etc), or if the item cannot be removed then a change is made in the current variation to reverse the quantity of this item.
Replace an existing item with another item	Any doors that do not have the existing item, or already have the new item are ignored (An exception is if the new item exists from a previous variation but is quantity is zero). For all other selected doors the replacement is made.
Change the quantity of an item	Any doors that do not have the item are ignored, otherwise the quantity for each selected door is changed.
Add each inventory item in a set	Each item in the set is added to each selected door. The quantity of each item is determined by the set. If an item already exists on a door and you have selected the option to increase the quantity, then the existing item is altered by the amount of the set quantity.
Remove all items	For each selected door, each inventory item is removed according to the following rule: The item is removed if possible (it is not in a prior variation etc), or if the item cannot be removed then a change is made in the current variation to reverse the quantity of this item.

Select doors

The doors that you selected before the starting the wizard are shown. Initially they are all selected. Before proceeding, peruse the list and deselect any doors that you want to exclude from the change.

Ready to change

A summary of the change that will be applied is shown. After you apply the change you will be given the option to rerun the wizard (Your door selection remains the same).

9.4.6 Bulk change installation and finishing

The Bulk Change Installation and Finishing wizard is the tool for making a dryfit, installation or finishing change to many doors at one time.

For example, perhaps you put an item on a door and did not specify installation, then duplicated that door many times. Now you realise that the item needs to be installed. To make this change manually, you would need to visit each door and alter installation for that part code. With the bulk change installation and finishing wizard you can make the change to all doors in one easy process.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Doors**

> Before doing a installation and finishing bulk change, you must select which doors it is to act on. Installation and finishing bulk change displays only the doors that are returned from a search, and from there you may individually select which of those doors to change

- Search for the doors you want to include in the bulk change inventory operation
- Click on the **More tasks** link then choose the option **Bulk change installation and finishing**

Making a change

Select actions

Set the change you want for dryfit, installation and finishing. If you are setting a note, be sure to choose the correct note rule.

Select one or more inventory items to apply the change to.

Select doors

The doors that you selected before the starting the wizard are shown. Initially they are all selected. Before proceeding, peruse the list and deselect any doors that you want to exclude from the change.

Ready to change

A summary of the change that will be applied is shown.

9.4.7 Duplicating a door

The process of duplicating doors takes one or more doors, preferably with some commonality in the way they are numbered, and from this it produces piles more doors.

> Important: Duplicating doors is a feature that will save you a huge amount of time on large and well structured projects. To use this feature to its maximum potential, you need to plan your data entry.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Doors**

- Search for the first door you want to duplicate.
- Right click on the door and choose **Duplicate door**.

Making a change

Select doors

The first door will be displayed.

- Use the **Select doors** and **remove door** links to build up the list of doors you want to duplicate.

Door numbering

The door numbers of the doors you selected are analysed, and ProMaster Hardware determines which parts of the door numbers can be changed to produce the new doors.

- Choose the method for how new door numbers will be created.

Here are the methods and how they work:

Method	Description
Create new door numbers using structured numbering	Looks for common parts in the door numbers and if common parts are available then this method is allowed. For example, doors 1.1A, 1.1B and 1.1C would be analysed as Numeric,Symbol,Numeric,Alpha and as the numeric parts are the same on all doors, they would be available for this method. You must enter the number that new doors will start from and progress up to. So, in this example, if you chose the second numeric portion and choose starting from 2 and progressing up to 4, then the following door numbers are generated: 1.2A, 1.2B, 1.2C, 1.3A, 1.3B, 1.3C, 1.4A, 1.4B, 1.4C. If door descriptions have some common characteristics with the door numbers, you will be offered the choice of how door descriptions will be created.
Create new door numbers using door number generation rules	This method works regardless of how existing doors are numbered and generates a sequence of new numbers for the new doors. You may enter a prefix and suffix. You must specify what the starting number is and how many of each door are generated. So, using the example where you are duplicating 3 doors, and you enter Prefix "X", Suffix "SP", Number from "2", Qty of each door "3" and pad number length to "2", then the following door numbers are generated: X02SP, X03SP, X04SP, X05SP, X06SP, X07SP, X08SP, X09SP, X10SP.

The number of variations created for each door is displayed, as is the total number of doors that will be generated.

Options are provided so you can control what is copied to the new doors (Notes, inventory, dimensions and extra info).

Confirm new door numbers

All the door numbers and descriptions that will be created are displayed. Peruse the list to be certain that it is what you are expecting.

Ready to duplicate doors

A summary of the change that will be applied is shown.

9.4.8 Duplicating doors in an area

The process of duplicating door areas takes all the doors in an area, preferably with some commonality in the way they are numbered, and from this it produces new areas that are a copy of the original area. For example, you might enter doors for level 1 of an apartment building and then duplicate this for areas 2 and 3.

> Important: Duplicating door areas is a feature that will save you a huge amount of time on large and well structured projects. To use this feature to its maximum potential, you need to plan your data entry.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Doors**
- Search for a the first door you want to duplicate.
- Click on **More tasks** and choose **Duplicate area**.

Making a change

Select area

Select the area you want to duplicate. The choice is pre-populated with the door you selected before starting the wizard.

Select doors

The doors in the area you selected are shown. Initially they are all selected. Before proceeding, peruse the list and deselect any doors that you do not want to duplicate for the new area.

Door numbering

The door numbers of the doors you selected are analysed, and ProMaster Hardware determines which parts of the door numbers can be changed to produce the new doors.

- Choose the method for how new door numbers will be created.

Here are the methods and how they work:

Method	Description
Create new door numbers using structured numbering	Looks for common parts in the door numbers and if common parts are available then this method is allowed. For example, doors 1.1A, 1.1B and 1.1C would be analysed as Numeric,Symbol,Numeric,Alpha and as the numeric parts are the same on all doors, they would be available for this method. You must enter the number that new doors will start from and progress up to. So, in this example, if you chose the first numeric portion and choose starting from 2 and progressing up to 3, then two areas are created with the following door numbers are generated: 2.1A, 2.1B, 2.1C, 3.1A, 3.1B, 3.1C.
Create new door numbers using door number generation rules	This method works regardless of how existing doors are numbered and generates a sequence of new numbers for the new doors. You may enter a prefix and suffix. You must specify what the starting number is and how many of each door are generated. The number of each door generated is effectively the number of new areas created. So, using the example where you are duplicating 3 doors, and you enter Prefix "X", Suffix "SP", Number from "2", Qty of each door "3" and pad number length to "2", then the following door numbers are generated: (X02SP, X03SP, X04SP), (X05SP, X06SP, X07SP), (X08SP, X09SP, X10SP). The parentheses show each of the 3 areas.

Create new door numbers by altering the leading characters of the door number	Using this method, you enter pairs of existing leading characters and what those characters will be replaced with on the new doors. Using this method, only one new area may be generated. To make another area you must run the wizard again. Here's an example. Say you are copying doors called DL4-1, DL4-2, APT401-1, APT401-2, APT403-1, APT402-2 Specify change "DL4" to "DL5" and "APT4" to "APT5". The door numbers produced will be: DL5-1, DL5-2, APT501-1, APT501-2, APT503-1, APT502-2

The number of new areas created for each door is displayed, as is the total number of doors that will be generated.

Options are provided so you can control what is copied to the new doors (Notes, inventory, dimensions and extra info).

Area names

ProMaster Hardware shows the first new door in each new area, and what it has determined the new areas will be called.

If you want to change the names of the new areas, then for each entry in the list, click to highlight the new area, enter a **new area name** in the space provided below then click **Update** to apply the new area name.

You must then specify the name for each area.

Confirm new door numbers

All the door numbers and areas that will be created are displayed. Peruse the list to be certain that it is what you are expecting.

Ready to duplicate door area

A summary of the change that will be applied is shown.

9.4.9 Removing doors in an area

On occasion you may need to remove a whole area. Most probably this will be when you have duplicate door areas and been a little too enthusiastic.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Doors**
- Search for a the first door you want to remove.
- Click on **More tasks** and choose **Remove doors in area**.

Making a change

Select area

Select the area you want to remove. The choice is pre-populated with the door you selected before starting the wizard.

Select doors

The doors in the area you selected are shown. Initially they are all selected. Before proceeding, peruse the list and deselect any doors that you do not want to remove.

Ready to remove selected doors in area

A summary of the change that will be applied is shown.

9.4.10 Door activity

When projects are large and have had a lot of activity it can be tricky to recall everything about a door without looking into all quotes, shipments, installs and claims.

The Door activity window gives a complete summary of all activity for a door.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Doors**
- Search for the first door you want to examine.
- Right click on the door and choose **Activity for this door**.

Notes

There can be a huge amount of information shown on this window, so take the time to become familiar.

Each inventory item on the door is shown.

For each inventory item, there is information for each variation (including the main contract) that has altered that item.

Quotes are shown first, followed by shipments, dryfit, install and finishing.

Claims are shown for each activity.

Right click on any line to drill down to see the quote, shipment dryfit, installation or claim.

Images are used to indicate complete items and also items that are incomplete.

An item may be considered incomplete because it is missing activity, or that activity is not complete.

9.4.11 Handings

Handings may be imported from your global definitions (See Door handing defaults 45) or added specific to the project.

You do not have to use handings in a project, and even if you do use them there is no requirement that each door have a value assigned.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Handings**
- Search for handings in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Import global, Add**, **Remove** and **Properties** buttons to enter and alter handings.

To import global items into the project, click **Import global**. You will be taken to a window to search for items in your global database.

To create a project specific item, click **Add**.

Each item must have a description and a short description. Project options determine whether the description or the short description is shown on reports etc, and the legend report may be used to provide a reference of short description and description for your customer (See Report: Legend 215).

Importing door handings from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Read the topic Door handing import (CSV) file format 258 for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

Other functionality

Click the **More tasks** link to:

Menu option	Description
Import items from another project	Runs a wizard to select another project then items from that project to bring into your project.
Show usage of items	Shows each item and the number of doors on which it appears.

9.4.12 Door types

Door types may be imported from your global definitions (See Door type defaults 46) or added specific to the project.

You do not have to use door types in a project, and even if you do use them there is no requirement that each door have a value assigned.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Door types**
- Search for door types in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Import global, Add**, **Remove** and **Properties** buttons to enter and alter door types.

To import global items into the project, click **Import global**. You will be taken to a window to search for items in your global database.

To create a project specific item, click **Add**.

Each item must have a description and a short description. Project options determine whether the description or the short description is shown on reports etc, and the legend report may be used to provide a reference of short description and description for your customer (See Report: Legend 215).

Importing door types from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Read the topic Door type import (CSV) file format 258 for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

Other functionality

Click the **More tasks** link to:

Menu option	Description
Import items from another project	Runs a wizard to select another project then items from that project to bring into your project.
Show usage of items	Shows each item and the number of doors on which it appears.

9.4.13 Door finishes

Door finishes may be imported from your global definitions (See Door finish defaults 44) or added specific to the project.

You do not have to use door finishes in a project, and even if you do use them there is no requirement that each door have a value assigned.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Door finishes**
- Search for door finishes in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Import global, Add**, **Remove** and **Properties** buttons to enter and alter door finishes.

To import global items into the project, click **Import global**. You will be taken to a window to search for items in your global database.

To create a project specific item, click **Add**.

Each item must have a description and a short description. Project options determine whether the description or the short description is shown on reports etc, and the legend report may be used to provide a reference of short description and description for your customer (See Report: Legend 215).

Importing door finishes from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Read the topic Door finish import (CSV) file format 257 for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

Other functionality

Click the **More tasks** link to:

Menu option	Description
Import items from another project	Runs a wizard to select another project then items from that project to bring into your project.
Show usage of items	Shows each item and the number of doors on which it appears.

9.4.14 Frame types

Frame types may be imported from your global definitions (See Frame type defaults 49) or added specific to the project.

You do not have to use frame types in a project, and even if you do use them there is no requirement that each door have a value assigned.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Frame types**
- Search for frame types in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Import global, Add**, **Remove** and **Properties** buttons to enter and alter frame types.

To import global items into the project, click **Import global**. You will be taken to a window to search for items in your global database.

To create a project specific item, click **Add**.

Each item must have a description and a short description. Project options determine whether the description or the short description is shown on reports etc, and the legend report may be used to provide a reference of short description and description for your customer (See Report: Legend 215).

Importing frame types from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Read the topic Frame type import (CSV) file format 259 for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

Other functionality

Click the **More tasks** link to:

Menu option	Description
Import items from another project	Runs a wizard to select another project then items from that project to bring into your project.
Show usage of items	Shows each item and the number of doors on which it appears.

9.4.15 Frame finishes

Frame finishes may be imported from your global definitions (See Frame finish defaults 48) or added specific to the project.

You do not have to use frame finishes in a project, and even if you do use them there is no requirement that each door have a value assigned.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Frame finishes**
- Search for frame finishes in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Import global, Add**, **Remove** and **Properties** buttons to enter and alter frame finishes.

To import global items into the project, click **Import global**. You will be taken to a window to search for items in your global database.

To create a project specific item, click **Add**.

Each item must have a description and a short description. Project options determine whether the description or the short description is shown on reports etc, and the legend report may be used to provide a reference of short description and description for your customer (See Report: Legend 215).

Importing frame finishes from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file**.

A simple wizard steps you through the import process.

Read the topic Frame finish import (CSV) file format 259 for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

Other functionality

Click the **More tasks** link to:

Menu option	Description
Import items from another project	Runs a wizard to select another project then items from that project to bring into your project.
Show usage of items	Shows each item and the number of doors on which it appears.

9.4.16 Lock functions

Lock functions may be imported from your global definitions (See Lock function defaults 57) or added specific to the project.

You do not have to use lock functions in a project, and even if you do use them there is no requirement that each door have a value assigned.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Lock functions**
- Search for lock functions in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Import global**, **Add**, **Remove** and **Properties** buttons to enter and alter lock functions.

To import global items into the project, click **Import global**. You will be taken to a window to search for items in your global database.

To create a project specific item, click **Add**.

Each item must have a description and a short description. Project options determine whether the description or the short description is shown on reports etc.

Importing lock functions from a csv file

To import data from a csv file, click on the **More tasks** link then choose **Import from csv file.**

A simple wizard steps you through the import process.

Read the topic Lock function import (CSV) file format 261 for more information on the file contents allowed.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

Other functionality

Click the **More tasks** link to:

Menu option	**Description**
Import items from another project	Runs a wizard to select another project then items from that project to bring into your project.
Show usage of items	Shows each item and the number of doors on which it appears.

9.4.17 Importing doors from a csv file

If you have door data in a CSV file, it is possible to import this data.

This topic describes the process of importing a CSV door file.

Read the topic Door import (CSV) file format 254 for more information on the file contents allowed.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Doors**
- Click on the **More tasks** link then choose the option **Import from csv file.**

Importing data

A simple wizard steps you through the import process.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Data remapping - Handing

The import wizard allows you to re-map the data in the import file onto the values available in the database. Each of the values found in the file for the field **Handing** must be mapped to an existing **Handing**. If the import values match, then the remapping will be completed automatically. Correct each import value by selecting it, then selecting the correct value from the **Use value** drop down list and clicking the **Set** button.

Data remapping - Door type

The import wizard allows you to re-map the data in the import file onto the values available in the database. Each of the values found in the file for the field **Door type** must be mapped to an existing **Door type**. If the import values match, then the remapping will be completed automatically. Correct each import value by selecting it, then selecting the correct value from the **Use value** drop down list and clicking the **Set** button.

Data remapping - Door finish

The import wizard allows you to re-map the data in the import file onto the values available in the database. Each of the values found in the file for the field **Door finish** must be mapped to an existing **Door finish**. If the import values match, then the remapping will be completed automatically. Correct each import value by selecting it, then selecting the correct value from the **Use value** drop down list and clicking the **Set** button.

Data remapping - Frame type

The import wizard allows you to re-map the data in the import file onto the values available in the database. Each of the values found in the file for the field **Frame type** must be mapped to an existing **Frame type**. If the import values match, then the remapping will be completed automatically. Correct each import value by selecting it, then selecting the correct value from the **Use value** drop down list and clicking the **Set** button.

Data remapping - Frame finish

The import wizard allows you to re-map the data in the import file onto the values available in the database. Each of the values found in the file for the field **Frame finish** must be mapped to an existing **Frame finish**. If the import values match, then the remapping will be completed automatically. Correct each import value by selecting it, then selecting the correct value from the **Use value** drop down list and clicking the **Set** button.

Data remapping - Rating

The import wizard allows you to re-map the data in the import file onto the values available in the database. Each of the values found in the file for the field **Rating** must be mapped to an existing **Rating**. If the import values match, then the remapping will be completed automatically. Correct each import value by selecting it, then selecting the correct value from the **Use value** drop down list and clicking the **Set** button.

Data remapping - Project inventory set

The import wizard allows you to re-map the data in the import file onto the values available in the database. Each of the values found in the file for the field **Project inventory set** must be mapped to an existing **Project inventory set**. If the import values match, then the remapping will be completed automatically. Correct each import value by selecting it, then selecting the correct value from the **Use value** drop down list and clicking the **Set** button.

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

9.4.18 Importing door rename from a csv file

If you have door renaming data in a CSV file, it is possible to import this data to change door numbers.

This topic describes the process of importing a CSV door rename file.

Read the topic Door rename import (CSV) file format 256 for more information on the file contents allowed.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Doors**
- Click on the **More tasks** link then choose the option **Import door rename from csv file.**

Importing data

A simple wizard steps you through the import process.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

9.4.19 Importing door inventory from a csv file

If you have door inventory data in a CSV file, it is possible to import this data.

This topic describes the process of importing a CSV door inventory file.

Read the topic Door inventory import (CSV) file format 256 for more information on the file contents allowed.

> This import allows you to add new inventory items to doors, alter existing items and also remove items. Items are removed by specifying all quantities (product, dryfit, install and finishing) for that item as zero. The quantities specified in the file are the absolute value required, not a change in value. So if an item on a door has quantity 3, and you import a file specifying 1, then the quantity is changed to 1, effectively removing 2 in the current variation.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Doors**
- Click on the **More tasks** link then choose the option **Import inventory from csv file.**

Importing data

A simple wizard steps you through the import process.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

9.4.20 Importing door extra data from a csv file

If you have door extra data in a CSV file, it is possible to import this data.

This topic describes the process of importing a CSV door extra data file.

Read the topic Door extra data import (CSV) file format257 for more information on the file contents allowed.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Doors**
- Click on the **More tasks** link then choose the option **Import door extra info from csv file.**

Importing data

A simple wizard steps you through the import process.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

9.5 Working with quotes

Quotes are created both for the main contract and for project variations.

Regardless of whether a quote is for the main contract or a variation, the release and acceptance of the quote is a key indicator for the shipping, installation and claim processes.

There are some differences between the two, as follows:

Main contract quotes

- You may create as many quotes as you wish for the main contract.
- A main contract quote always includes all activity in that variation unless you license the Partial Quotes feature and create a partial quote.
- Each item that appears on the quote is priced.
- You may offer alternative products on the quote (not available on partial quotes).
- Each alternative product is priced.
- Ultimately, only one quote on the main contract will be accepted, and all others rejected. Partial quotes can not be accepted.
- When the quote is accepted, you choose which, if any, alternatives were accepted as part of the quote.

Variation quotes

- Only one quote may be created for each variation.
- A variation quote always includes all activity in that variation.
- Each item that appears on the quote is priced.
- Alternative offerings are not allowed.
- When the quote is accepted, you must record the variation authorisation number.
- Releasing a variation quote effectively closes off that variation, thereby requiring a new variation for any future project changes.

> The partial quotes module, available for the Premium edition, is licensed as a separate feature to the main product. Contact WH Software Limited (See Contacting WH Software Limited 6) or your ProMaster Hardware reseller for more information.

9.5.1 Searching for quotes

The main contract and each variation must be quoted.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Quotes**
- Search for quotes in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter quotes. See Entering quotes[130] .

Other functionality

By right clicking on a quote in the list, you may:

Menu option	Description
Add partial quote	If the partial quotes module is licensed, this begins the process of making a partial quote, from where you select the doors to be on the quote.
Select doors for partial quote	If a partial quote is selected, this allows the door selection to be altered.
Duplicate quote	Makes a new quote by copying the selected quote. Available only on the main contract and only until prior to a quote being accepted. Use this feature when you are making several quotes on the main contract to several associates.
Documents	Displays documents associated with the quote and allows you to add new documents that will be associated with the quote. See Working with documents[196] .
Communication	Displays communications associated with the quote and allows you to add new communications that will be associated with the quote. See Working with communications[195] .
Release quote	Releases the quote so it is locked, ready for printing. See Releasing a quote[137] .
Accept quote	Accepts the quote that the customer has accepted. See Accepting a quote[137] .
Return quote to data entry	Allows the quote to be edited provided it has no dependent activity. See Returning a quote for data entry[139] .
Print quote	Prints or emails the quote paperwork. See Printing a quote[139] .

Click the **More tasks** link to:

Menu option	Description
Copy to clipboard	Places data about the quote on the clipboard for use in other programs. See Copying quote data to the clipboard[143] .
Export products and prices (csv)	Creates a data file containing products and optionally cost and price. See Exporting products and prices to a csv file[143] .
Export door product matrix (csv)	Creates a data file with a matrix of doors and products. See Exporting a door product matrix to a csv file[144] .
Export quote to E3	Places data about the quote on the clipboard for use by E3. Available only if E3 integration is enabled in the Application parameters[37] .

9.5.2 Entering quotes

See the topic Searching for quotes[129] to learn how to add quotes.

The quote totals and margins are shown on the first tab.

Explanation of data fields

Data field	Description

Quote no	The number that uniquely identifies this quote within the project. Quote numbers are generated automatically from the project number but you may change it to anything you like.
Quote date	The date of the quote.
Associate	The person who the quote is addressed to.
Price annotation	A message regarding the prices. Typically you will have a message saying that the prices exclude GST, VAT or other taxes. See Application parameters 37 to set a default value for new quotes.
Quote text	This is the body of the main quotation document. Anything you enter here appears on the "Quote / schedule cover sheet". See Printing a quote 139 . Merge fields are available. See Quote merge fields 263 for a description of fields and parameters. Right click on the document for more choices. **Options:** Replace text with template - Choose a new template to replace the quote text. To create templates, see Templates 60 . Insert paragraph - Insert a predefined paragraph at the cursor position. While this may be useful occasionally, it is recommended that you use a template for the quote text rather than trying to build it from paragraphs each time. To create paragraphs, see Templates 60 . Insert field - Select a merge field to insert at the cursor position. See Merge fields 262 and Quote merge fields 263 . Preview - Preview the quote text with merge fields populated with data. Note: Some fields are filled with the data you are entering, but a number of fields, notably tables of data, are filled by examining saved data so until you save the quote and re-open it the display of the preview will not be exact.

It is recommended that you define one or more templates (see Templates 60) and always start by choosing "Replace text with template" to use a template, then remove anything from the text that is not applicable to your quote.

Inventory

This tab shows the items included on your quote. The items are calculated automatically from the doors and door inventory in the current variation (or main contract). On this tab you perform the costing for each inventory item.

The summary on the right gives information about the selected item.

The summary at the bottom are the totals for the quote, the same information that is displayed on the first tab "Quote".

On quotes for variations, a star graphic appears against any items that have not appeared on the main contract or a quote for an earlier variation to indicate that it is new item with new pricing.

Right click on an item to:

Option	**Description**
Edit prices	Edit the item prices. See Pricing a quote 133 .
Show doors for this item	Shows the doors what contribute to the quantities for the item.
Add alternative product	Add an alternative offering. Available only on the main contract. See Quoting on alternative products 135 .
Sort by inventory order Sort by part code	Changes the way items are displayed in the quote. This is used only during editing and whenever the quote is printed etc the inventory order is always

	used.

Click **More tasks** to:

Option	Description
Set all prices as mark-up from cost	See Changing the margin on all items [133]
Set all prices as discount from retail	See Changing the margin on all items [133]
Import costs and prices (csv)	See Importing costs and prices [134]
Copy these prices to the defaults for this project	Takes the prices and margins you have set on the quote and copies them into the project defaults. See Default project inventory prices [100] .
Allow under-cost quote to be released	When a quote is saved, checks are performed on the prices and margins to ensure that prices are entered and that items are not being sold below cost. If price conditions are not met then the quote is flagged as incomplete and it is not able to be released. If you have set all the prices you want and are intentionally selling below cost then immediately prior to saving the quote, select this option and the checking will be relaxed to allow the quote to be released. This option is available only if your login has permissions to use it. See Users [36] .

Alternatives

Alternatives are available only on the main contract and not on partial quotes.

Any alternatives you have created are listed. See Quoting on alternative products [135] to add alternatives.

Doors

When a partial quote is open, a doors tab is shown on which the doors within the quote are displayed.

9.5.3 Partial quotes

partial quotes allow a selection of doors to be quoted on instead of all doors when making a quote for the main contract.

> The partial quotes module, available for the Premium edition, is licensed as a separate feature to the main product. Contact WH Software Limited (See Contacting WH Software Limited [6]) or your ProMaster Hardware reseller for more information.

See the topic Searching for quotes [129] to learn how to add partial quotes.

Things to note are:

- Partial quotes are available for the main contract only.
- Partial quotes contain one or more doors.
- Partial quotes are released just like any other quote, but cannot be accepted.

- Alternatives are not available for partial quotes - it would make no sense as partial quotes cannot be accepted, which is where the alternative would be applied.
- All reporting for full quotes is available for partial quotes.
- At any time you may alter the doors on the partial quote (See the topic Searching for quotes 129 to learn how) and after the door selection is altered then the quote is opened and recalculated.
- If a project with partial quotes is exported to a ProMaster Hardware user who does not have the partial quotes module, the quote will be visible but no activity is allowed on the quote.

9.5.4 Pricing a quote

For each inventory item that appears on a quote, you must perform the pricing process.

You must set prices for the product, dryfit, installation and finishing as appropriate.

ProMaster Hardware offers initial prices based on the prices stored project inventory prices (see Default project inventory prices 100).

Pricing a product

For each of the product, dryfit, installation and finishing you should complete:

- The **Cost** to you.
- The **Retail** price if you are calculating prices from the retail.
- How the **Calculation** is to be performed (discount from retail or mark-up from cost).
- The **Percent** for the calculation

Additionally, you may enter the **Price** or the **Total** and ProMaster Hardware will use these numbers for the calculation of the percent.

When you have finished costing the item, click **OK** to save it.

Copying prices

Click **Copy prices** to peruse historical price usage and apply them to this alternative. See Copying prices from historical usage 136 .

9.5.5 Changing the margin on all items

Mark-up from cost

To set all items to use mark-up from cost and to have the same percentage applied.

- Click the **More tasks** link on the quote window and choose **Set all prices as markup from cost**.

Enter the mark-up percentage you want.

Choose what you want to apply it it (Product, dryfit, installation, finishing)

> You are warned if any items do not have a cost price.

Discount from retail

To set all items to use discount from retail and to have the same percentage applied.

- Click the **More tasks** link on the quote window and choose **Set all prices as discount from retail**.

Enter the discount percentage you want.

Choose what you want to apply it it (Product, dryfit, installation, finishing)

> You are warned if any items do not have a retail price.

9.5.6 Importing costs and prices

If you have costs and prices in a CSV file, it is possible to import this data.

This topic describes the process of importing a CSV quote costs and proces file.

Read the topic Quote costs and prices import (CSV) file format 261 for more information on the file contents allowed.

Getting started

Click the **More tasks** link on the quote window and choose **Import costs and prices (csv)**.

Importing data

A simple wizard steps you through the import process.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

> A price pair (cost, price) will be imported only if both values are present and if the cost is not zero. The calculation will be set to "Markup from cost".

9.5.7 Quoting on alternative products

To use alternatives, you must be working on a quote for the main contract (not on a quote for a variation).

As part of presenting a quote for a project, you may wish to offer alternative products to;

- Provide a more suitable product.
- Provide a cheaper product so the quote becomes more appealing.
- Provide a product that is exclusive to you so you may obtain a competitive advantage.
- Provide a product on which you make a greater margin.
- Provide a product that is able to be supplied within the project time constraints.

Notes

You may offer as many or as few alternative products as you want.

For any product on the basic quote, you may offer multiple alternative products.

The same alternative product may be offered for two or more different products on the basic quote.

> Alternatives are included in quote text by inserting the merge field [Quot_Alternative_Table].

Getting started

From the Quote window:

- Click on the **Inventory** tab.
- Right click on the item for which you want to offer an alternative and choose **Add alternative product**.
- From the project inventory window that appears, select the inventory item to offer as an alternative.
- Now you are taken to the **Alternative Pricing** window, where you do the pricing for the alternative product then click **OK**.

Pricing an alternative product

The alternative description appears on your quote as part of the merge field at the top of each alternative offering.

The notes appears at the end of each alternative offering and is intended for you to provide a more verbose description of why this alternative may be of interest.

Most importantly, the actual prices for the product, dryfit, installation and finishing. ProMaster Hardware offers initial prices based on the prices stored project inventory prices (see Default project inventory prices 100).

For each of the product, dryfit, installation and finishing you should complete:

- The **Cost** to you.
- The **Retail** price if you are calculating prices from the retail.
- How the **Calculation** is to be performed (discount from retail or mark-up from cost).
- The **Percent** for the calculation

Additionally, you may enter the **Price** or the **Total** and ProMaster Hardware will use these numbers for the calculation of the percent.

A comparison is shown between the original product and the alternative product prices, and indicates if it is a cost or a savings.

When you have finished costing the alternative, click **OK** to save it.

Copying prices

Click **Copy prices** to peruse historical price usage and apply them to this alternative. See Copying prices from historical usage 136.

Other functionality

From the Quote window, click on the Alternatives tab and right click on an alternative for more functionality.

From here you may **Edit prices** or **Remove** the alternative.

Use the **Move up** and **Move down** options to sort alternatives into the order you want.

9.5.8 Copying prices from historical usage

At the bottom of the **Pricing** and **Alternative pricing** windows is a link **Copy prices**.

In determining your price you may choose to consider the recent history of the product.

This link opens a window for viewing historical usage and copying prices.

It shows prices for the item from various sources where it has appeared in the past 2 years.

Prices are shown from:

- Global inventory
- Default project inventory prices from this project
- Quote prices from other quotes in this project
- Default project inventory prices from other projects
- Quote prices from other quotes in other projects

After global prices and prices from this project, all remaining prices are sorted in reverse date order.

Filtering

To restrict the items shown, enter some text in the **Look for** text box and click **Apply**.

Every word you enter in the **Look for** text box must appear on the one line within the project number, project description or quotation number.

Using a historical price

Select the line containing the prices you want.

At the bottom of the window there are controls for product, dryfit, installation and finishing as appropriate for the item you are editing.

Various links will be available (Set cost, Set retail, Set calc and Set all) depending on what information is available for copying.

Click the links required to copy prices.

Click **OK** to accept the prices you have set and return to the pricing window.

9.5.9 Releasing a quote

Prior to a quote being released, it is in entering status and as such there is not too much enforcement of integrity rules. While an quote is entering, you may print the paperwork, but it is flagged as PROOF.

The process of releasing a quote checks the quote for validity then flags it as released.

A released quote may not be altered unless you return it for data entry. See Returning a quote for data entry 139.

From a released quote you print the official paperwork. See Printing a quote 139.

A quote must be released before is may be accepted. See topic Accepting a quote 137.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Quotes**
- Search for quotes in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Right click on the quote and choose **Release quote**.

When the quote is released an extensive check is performed. If there are any errors, you will be notified and you must open the quote (see Entering quotes 130) and rectify the errors.

A number of errors are corrected automatically by opening the quote and saving it (e.g. discrepancies between the quote and door inventory) but other errors, such as pricing errors require you to make a change.

9.5.10 Accepting a quote

After a quote is entered, released and printed, there comes a time when you receive the acceptance.

A quote must be released before is may be accepted.

Partial quotes cannot be accepted.

There are several aspects to accepting quotes, and each has some characteristics that you need to know.

Types of quote acceptances

1. The most simple situation is where you have a single quote for the project, and it has no alternatives.
2. Next, there is the type of quote where again it is the only quote on the project, but you have offered one or more alternatives.

3. Third, there is the situation where you have created more than one quote for the project, and one has been accepted.
4. Finally, there is the quote for a variation.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Quotes**
- Search for quotes in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Right click on the quote and choose **Accept quote**.

Accepting a main contract without alternatives

To accept a quote for the main contract, you may enter the **Authorisation number** if one has been provided.

Click **OK** to accept the quote.

The quote is marked as accepted.

If any other quotes exist for the main contract, they are marked as rejected.

Accepting a main contract with alternatives

To accept a quote for the main contract, you may enter the **Authorisation number** if one has been provided.

A list of the alternatives you offered is shown.

If the acceptance includes any alternative products, put a check next to the alternatives that have been accepted.

You will not be allowed to choose alternatives that conflict. E.g. If you offered both product B and product C as an alternative to product A, then you may choose only product B or product C but not both.

As you select alternative products, the prices are updated.

Click **OK** to accept the quote.

If you have accepted any alternatives, You will be asked to confirm that you want to permanently modify the project to include the alternatives.

Next you will be taken to a window to create a snapshot of the project. See Creating a project snapshot 93 . It is not mandatory to create a snapshot, but as the project will be modified it is strongly recommended that you allow the snapshot to proceed so you may refer to it to see the original project offer.

Next, the project is modified as follows:

- The alternatives are applied back to the doors, modifying the project.
- The quote is modified to include the alternatives in place of the original product.
- The quote is modified to remove the alternative offerings.
- If any other quotes exist for the main contract, they are removed (they refer to the original product, not the one accepted as an alternative).

The quote is marked as accepted.

Accepting a quote for a variation

To accept a quote for a variation, you must enter the **Authorisation number** provided by the project manager.

Click **OK** to accept the quote.

The quote is marked as accepted.

9.5.11 Returning a quote for data entry

Once a quote is released, it may not be altered.

If the situation arises where you have released a quote (or indeed have accepted it) and you need to amend it, then you must return it to data entry.

> If a quote has been released and printed, or if it has been accepted, you should exercise great caution in running this process. Note this: When a quote is returned to data entry, the variation (or base project) becomes editable and any door activity that takes place will happen within that variation. Once this happens, the subsequent release of your quote will be produce a different result.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Quotes**
- Search for quotes in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Right click on the quote and choose **Return quote to data entry**.

Notes

A quote may be returned to data entry only if conditions do not exist to prohibit the change. The following conditions must be met:

- The quote must be the most recent quote.
- There must be no subsequent variation.
- There must be no items from the quote on a shipment.
- There must be no items from the quote on an install.
- There must be no items from the quote on a claim.

9.5.12 Printing a quote

Prior to a quote being released, it is in entering status. While a quote is entering, you may print the paperwork, but it is flagged as PROOF.

The pre-release printouts are for checking, and you should not use them for distribution.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Quotes**
- Search for quotes in the same manner that other ProMaster Hardware searches are performed.
- Right click on the quote and choose **Print**.

The reports

Report	Description
Quote / schedule cover sheet	This prints the main quotation document. **Notes:** The contents and layout of this report are controlled by the text and merge fields that you enter when creating the quote.
Legend	Prints the legend report (see Report: Legend 215 for a description). Click the **Legend options** to access options for the content of the report.
Product schedule	Shows each product in the quote, with product details. **Options:** Show prices - shows product, dryfit, install, finishing and total price. Show pictures. Show totals - shows totals at the end of the report.
Compact product schedule	Shows each product in the quote, with product quantity. **Options:** Show prices - shows product price and total product price for each item. Show totals - shows totals at the end of the report. Show headings - shows headings from the short code headings if short codes are used, otherwise from the inventory type. No re-sorting of products is performed so you may see repeated headers if you do not sort your products according to their groupings. **Notes:** Dryfit, installation and finishing are not shown so this report may be unsuitable for projects that include them.
Product summary	Shows each product in the quote, with product details. The product quantity is shown. Prices are not included in this report.
Area / door type price summary	Prints a report with two sets of data. The first is a summary by door area and by door type, showing total prices for each combination of area and door type. The second part of the report is a summary by door type only, showing total prices for each door type. **Options:** Layout - controls which prices are included in the report. **Notes:** The data in this report is available as merge fields that can be included in the quote and hence in the report "Quote / schedule cover sheet".
Doors with prices	Shows a price for each door on the quote. For variations this report shows only the incremental price for each door, not the total price to date. **Options:** Show totals - shows totals at the end of the report. Show only a total price on each door - Allows suppression of price components (product, dryfit, install, finishing) leaving just a total price for each door. Start each area on a new page - Removes the area column and places an area heading at the top of each change or area. Each area is started on a new page.
Doors with hardware	Shows each door on the quote, and for each door the items on that door. The quantity shown of each item is the cumulative amount up to and including the variation for the quotation being printed. **Options:** Show all doors - Show all doors in the project instead of restricting the report to doors that are included in the quote.

	Show doors notes - Show door notes after each door. Show rating - Show a column for the door rating. Show handing - Show a column for the door handing. Show door type - Show a column for the door type. Start each area on a new page - Removes the area column and places an area heading at the top of each change or area. Each area is started on a new page. Use compact layout - prints the report in portrait format instead of landscape, possibly resulting in fewer pages. **Notes:** The "Show all doors" option can be used to generate a "here's how it is now" snapshot of the project to give to the customer.
Doors with hardware and prices	Shows each door on the quote, and for each door the items on that door that have been included in the quote. Prices are shown for each door. **Options:** Show doors notes - Show door notes after each door. Show individual item prices - Shows price for each item on each door. Show rating - Show a column for the door rating. Show handing - Show a column for the door handing. Show door type - Show a column for the door type. Start each area on a new page - Removes the area column and places an area heading at the top of each change or area. Each area is started on a new page. Use compact layout - prints the report in portrait format instead of landscape, possibly resulting in fewer pages. **Notes:** Available only for the main contract.
Door variation changes and prices	Shows each door on the quote, and for each door the changed items on that door. Prices changes are shown for each door. **Options:** Show doors notes - Show door notes after each door. Show individual item prices - Shows price for each item on each door. Show rating - Show a column for the door rating. Show handing - Show a column for the door handing. Show door type - Show a column for the door type. Start each area on a new page - Removes the area column and places an area heading at the top of each change or area. Each area is started on a new page. Use compact layout - prints the report in portrait format instead of landscape, possibly resulting in fewer pages. **Notes:** Available only for variations, not the main contract. Changes for each part (product, dryfit, install, finishing) of each item on each door are shown as a "+" or "-" quantity to show the change that is included in the quote.
Products by supplier for ordering	Shows the items and quantity that are required from each supplier. **Options:** Start each supplier on a new page - Causes a page break between suppliers. Also included additional information about each supplier. **Notes:** Since this report includes cost prices, as a safety measure you are unable to email this report at the same time that you generate any other reports.

Product installation costs for ordering	Shows the costs (from your installer) for the installation of each item on the quote. **Notes:** Since this report includes cost prices, as a safety measure you are unable to email this report at the same time that you generate any other reports.

Inventory display options

These options control the way inventory is presented.

Option	Description
Use short code for inventory part code	Available if your project uses short part codes. If checked, the short code to be used in place of the inventory part code.
Show inventory part code	Available if you have selected to use short codes on the report. If checked, the description to be prefixed with the part code.
Show inventory brand	If checked, the inventory brand is shown on the report.
Show inventory finish	If checked, the inventory finish is shown on the report.

Options

Click the **More options** link for additional options.

Here is an explanation of the option choices:

Option	Description
Show door separator line	Uses a line to separate doors. This layout option should remain on to increase readability unless you have a specific need to remove the lines.
Show inventory separator line	Uses a line to separate inventory items. This layout option should remain on to increase readability unless you have a specific need to remove the lines.
Merge all reports into a single PDF file when emailing	Merges all reports into a single PDF when emailing, and is therefore attached as a single attachment. The PDF may contain a mix of portrait and landscape reports.
Documentation type: Quote Documentation type: Schedule	Chooses if reports are printed as a quote or as a schedule. **Schedule:** Not all reports and options are available for schedules - anything with prices are excluded. Reports are titled Schedule rather than Quote. This allows manufacturers to produce a schedule in the same manner as a quotation but without being concerned with prices.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports276 for more information.
Email	The report is sent via email as a PDF attachment.

9.5.13 Copying quote data to the clipboard

If you want to use the quote data in another program, or possibly to generate a quote in your accountancy software you can use this procedure to get summary of the quote data.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Quotes**
- Search for quotes in the same manner that other ProMaster Hardware searches are performed.
- Select the quote you want.

Exporting data

- Click on the **More tasks** link then choose **Copy to clipboard**.
- Choose if you want to to copy quote information, products and prices or if you want to copy alternative product offerings.

9.5.14 Exporting products and prices to a csv file

This export produces data files that extract the prices on a quotation so that this data may be manipulated externally.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Quotes**
- Search for quotes in the same manner that other ProMaster Hardware searches are performed.
- Select the quote you want.

Exporting data

- Click on the **More tasks** link then choose **Export products and costs (CSV)**.

A simple wizard steps you through the process of choosing where the data will be written, choosing which data to export and choosing export options.

Destination

Choose the destination for the data files.

Data selection

Multiple types of data may be exported at the same time. Each type of data is written to a separate file, named according to the type of data.

9.5.15 Exporting a door product matrix to a csv file

This export produces a matrix of doors versus products on a quotation so that this data may be manipulated.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Quotes**
- Search for quotes in the same manner that other ProMaster Hardware searches are performed.
- Select the quote you want.

Exporting data

- Click on the **More tasks** link then choose **Export door product matrix (CSV)**.

A simple wizard steps you through the process of choosing where the data will be written, choosing which data to export and choosing export options.

Destination

Choose the destination for the data files.

Data selection

Multiple types of data may be exported at the same time. Each type of data is written to a separate file, named according to the type of data.

9.6 Working with finishing

Finishing accommodates two quite different requirements.

Some products may require finishing that incorporates a special process. For example some door furniture may require power coat in a non-standard colour.

The other and more common type of finishing is dimensioned product such as kick plates.

Regardless of the type of finishing required, door items may be flagged as requiring finishing just like they are for dryfit or install.

Dimensioned products need to be flagged as such. This is done in the project inventory setup (see Adding project inventory 96) by turning on the flag **Record dimensions for finishing**.

Dimensioned product

For dimensioned product, the following work-flow is recommended:

1. Print worksheets for recording dimensions, or output an xml file to a third party recording solution. See Printing finishing worksheets 145.
2. Enter the dimensions into your project. See Enter finishing dimensions 146.
3. Print instructions for manufacturing the dimensioned product, or output an xml file if the manufacturer is able to take this. See Printing finishing instructions for dimensioned product 147.
4. Print labels for affixing to the dimensioned product to identify it. See Printing labels instructions for dimensioned product 149.
5. Record which items are finished so they may then appear on a claim. See Recording finished items 152.

9.6.1 Printing finishing worksheets

Finishing worksheets are for recording dimensions of items that need to be manufactured to size. See Working with finishing 144 for an overview.

(You may wish to label the position of the items on doors (e.g. Push and Pull) prior to printing this report so there is absolute clarity of what each position is intended to be. To do that see Enter finishing dimensions 146)

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Finishing** then **Print dimension work sheets**.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Which doors do you want to include

Range	Description
Choose doors by	**All doors**: All doors are printed. **A selection of doors:** The selected doors are included in the report. Click the **Select doors** link to build up your selection of doors. **Doors in an area:** Doors in a single area are included in the report. Choose an area from the list. **Doors in a stage:** Doors in a single stage are included in the report. Choose a stage from the list.
Door types	Select one or more door types to restrict the range of doors printed. Not available when choosing a selection of doors.
Frame types	Select one or more frame types to restrict the range of doors printed. Not available when choosing a selection of doors.

For which items do you want to record finishing dimensions

Project inventory items that are flagged **Record dimensions for finishing** are shown. See Adding project inventory 96 .

Choose one or more items - typically all items should be selected.

Options

Options modify the way the report appears, or the data included in the report.

Here is an explanation of the option choices:

Option	Description
Start each area on a new page	Removes the door area column (giving more space for other fields) and creates a header at the start of each area. Doors are resorted if necessary to ensure that doors in an area are consecutive. Each area is started on a new page.
Email format	If the data is emailed, you have a choice of sending it as a PDF report for printing, XML data file for integration with a third party recording solution or both. **Notes:**

	The XML file may be updated by a recording solution then imported when recording dimensions. See Enter finishing dimensions[146] .

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup[85]), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports[276] for more information.
Email	The report is sent via email as a PDF attachment.

9.6.2 Enter finishing dimensions

After finishing worksheets are produced and dimensions recorded, those dimensions need to be entered.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Finishing** then **Enter dimensions**.
- Choose which doors and items you want to see in the data entry screen then click **Find**.

> You should make the same selection that you made when printing the finishing worksheets so the data and its layout are the same as your printouts.

Making a change

Each door and item requiring dimensions is shown. When an item has a quantity greater than one, it is shown multiple times and the sequence (1, 2...) for each door differentiates between them. There is a position description which you may use to describe the item location (e.g. Push and Pull for kick plates).

On the right is an editor that operates on the selected item.

The editor

Enter the dimensions you require. It is not necessary to record dimensions that are not relevant. The position may be entered.

Click **Apply / next** to save the values to the current item and move to the next item.

If you have recorded dimensions that are correct for the current item, **Paste / next** will copy them without the need to type them.

Right click on an item for options:

Menu option	Description

Paste / next	Paste the remembered values into the current item.
Paste position also	Determines whether or not the position text is pasted when pasting remembered dimensions.
Remember values	Remember the values for the selected item so they may be pasted onto other items. Values are stored separately for each sequence, so for example sequence 1 items (say Push) are only ever pasted in to sequence 1 items and sequence 2 items (say Pull) are only ever pasted in to sequence 2 items.
Notes	Opens a window for recording notes about the current item.
Revert to original values	Undoes any changes to the current item.
Import data from XML file	Allows you to select a file from your installer to import. The file sent to the installer (see Printing finishing worksheets 145) is in the correct format. The format must not be altered. The attributes **WidthMM**, **HeightMM** and **ThicknessMM** may be altered by the installer to reflect the dimensions of an item.
Copy this position to same sequence, only when blank Copy this position to same sequence, overwrite allowed	To assist in entering position text for each sequence of each item, you may enter the position on one line then use these options to copy the text to other lines with the same sequence number. This may be done before printing finishing dimension worksheets (see Printing finishing worksheets 145) so the installer has the position descriptions available.
Find previous blank	Moves to the previous item without dimensions.
Find next blank	Moves to the next item without dimensions.

9.6.3 Printing finishing instructions for dimensioned product

This report contains the data required for manufacturing dimensioned product.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Finishing** then **Print finishing instructions for dimensioned product**.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Which doors do you want to include

Range	Description
Choose doors by	**All doors**: All doors are printed. **A selection of doors:** The selected doors are included in the report. Click the **Select doors** link to build up your selection of doors. **Doors in an area:** Doors in a single area are included in the report. Choose an area from the list. **Doors in a stage:** Doors in a single stage are included in the report. Choose a stage from the list.
Door types	Select one or more door types to restrict the range of doors printed. Not available when choosing a selection of doors.
Frame types	Select one or more frame types to restrict the range of doors printed. Not available

	when choosing a selection of doors.

For which items do you want to produce finishing instructions

Project inventory items that are flagged **Record dimensions for finishing** are shown. See Adding project inventory 96 .

Choose one or more items - typically all items should be selected.

Options

Options modify the way the report appears, or the data included in the report.

Here is an explanation of the option choices:

Option	Description
Show doors	With this option on, each dimension is followed by a list of doors, Without this option on, only a summary for each item at each size is shown.
Show door finishing note	Includes any finishing notes that were recorded against the doors.
Show dimension note	Includes any notes that were entered when dimensions were recorded. See Enter finishing dimensions 146 .
Include items marked as finished	Choose if you want to include or omit items that have already been marked as finished.
Start each area on a new page	Removes the door area column (giving more space for other fields) and creates a header at the start of each area. Doors are resorted if necessary to ensure that doors in an area are consecutive. Each area is started on a new page.
Show door separator line	Uses a line to separate doors. This layout option should remain on to increase readability unless you have a specific need to remove the lines.
Email format	If the data is emailed, you have a choice of sending it as a PDF report for printing, XML data file for integration with a third party manufacturing solution or both.

Inventory display options

These options control the way inventory is presented.

Option	Description
Use short code for inventory part code	Available if your project uses short part codes. If checked, the short code to be used in place of the inventory part code.
Show inventory part code	Available if you have selected to use short codes on the report. If checked, the description to be prefixed with the part code.
Show inventory brand	If checked, the inventory brand is shown on the report.
Show inventory finish	If checked, the inventory finish is shown on the report.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports[276] for more information.
Email	The report is sent via email as a PDF attachment.

9.6.4 Printing labels instructions for dimensioned product

This report produces labels for affixing to dimensioned product as it is manufactured.

The labels are produced in the same order as the finishing instructions report (i.e. by part code and by dimensions), not according to the normal door order. This way the manufacturing process is optimised and the labels are in the correct order for the manufacturing process.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Finishing** then **Print finishing labels for dimensioned product**.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Which doors do you want to include

Range	Description
Choose doors by	**All doors**: All doors are printed. **A selection of doors:** The selected doors are included in the report. Click the **Select doors** link to build up your selection of doors. **Doors in an area:** Doors in a single area are included in the report. Choose an area from the list. **Doors in a stage:** Doors in a single stage are included in the report. Choose a stage from the list.
Door types	Select one or more door types to restrict the range of doors printed. Not available when choosing a selection of doors.
Frame types	Select one or more frame types to restrict the range of doors printed. Not available when choosing a selection of doors.

For which items do you want to produce finishing instructions

Project inventory items that are flagged **Record dimensions for finishing** are shown. See Adding project inventory[96] .

Choose one or more items - typically all items should be selected.

Options

Options modify the way the report appears, or the data included in the report.

Here is an explanation of the option choices:

Option	Description
Layout	Choose the label size you use.
Include items marked as finished	Choose if you want to include or omit items that have already been marked as finished.
Sort by area before product	Analogous to the option "Start each area on a new page" when producing finishing instruction. This may result in the doors being resorted so that areas remain together.

Inventory display options

These options control the way inventory is presented.

Option	Description
Use short code for inventory part code	Available if your project uses short part codes. If checked, the short code to be used in place of the inventory part code.
Show inventory part code	Available if you have selected to use short codes on the report. If checked, the description to be prefixed with the part code.
Show inventory brand	If checked, the inventory brand is shown on the report.
Show inventory finish	If checked, the inventory finish is shown on the report.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports 276 for more information.
Email	The report is sent via email as a PDF attachment.

9.6.5 Printing finishing instructions for non-dimensioned product

This report contains the data required for manufacturing non-dimensioned product.

The finishing note you enter when recording items against doors is printed by this report.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Finishing** then **Print finishing instructions for non-dimensioned product**.

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Which doors do you want to include

Range	Description
Choose doors by	**All doors**: All doors are printed. **A selection of doors:** The selected doors are included in the report. Click the **Select doors** link to build up your selection of doors. **Doors in an area:** Doors in a single area are included in the report. Choose an area from the list. **Doors in a stage:** Doors in a single stage are included in the report. Choose a stage from the list.
Door types	Select one or more door types to restrict the range of doors printed. Not available when choosing a selection of doors.
Frame types	Select one or more frame types to restrict the range of doors printed. Not available when choosing a selection of doors.

For which items do you want to produce finishing instructions

Project inventory items that are NOT flagged **Record dimensions for finishing** are shown. See Adding project inventory 96 .

Choose one or more items.

Options

Options modify the way the report appears, or the data included in the report.

Here is an explanation of the option choices:

Option	Description
Show doors	With this option on, each dimension is followed by a list of doors, Without this option on, only a summary for each item at each size is shown.
Include items marked as finished	Choose if you want to include or omit items that have already been marked as finished.
Start each area on a new page	Removes the door area column (giving more space for other fields) and creates a header at the start of each area. Doors are resorted if necessary to ensure that doors in an area are consecutive. Each area is started on a new page.
Show door separator line	Uses a line to separate doors. This layout option should remain on to increase readability unless you have a specific need to remove the lines.

Inventory display options

These options control the way inventory is presented.

Option	Description
Use short code for inventory part code	Available if your project uses short part codes. If checked, the short code to be used in place of the inventory part code.
Show inventory part code	Available if you have selected to use short codes on the report. If

	checked, the description to be prefixed with the part code.
Show inventory brand	If checked, the inventory brand is shown on the report.
Show inventory finish	If checked, the inventory finish is shown on the report.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports276 for more information.
Email	The report is sent via email as a PDF attachment.

9.6.6 Recording finished items

After finishing is complete, you must record this so the finished items may be claimed.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Finishing** then **Enter finished items**.
- Choose which doors and items you want to see in the data entry screen.
- Choose which inventory items you want to see in the data entry screen
- Click **Find**.

Making a change

Each door and item requiring finishing is shown.

On the right is an editor that operates on the selected item.

The editor

Turn on or off (typically on) the **Item is finished** flag.

Click **Apply / next** to save the setting to the current item and move to the next item.

Right click on an item for options:

Menu option	Description
Revert to original values	Undoes any changes to the current item.
Mark all items finished	All items are marked as finished.

9.7 Working with shipments

Shipments are the process whereby ProMaster Hardware records the items you are shipping to the customer, records the packaging, prints the paperwork, and produces shipping labels on your label printer.

There are three types of shipments:

Shipment type	Description
Normal (or positive)	This is a normal shipment where you send goods to the customer. The **Add** button produces this type of shipment. Only positive quantity items may be on the shipment.
Negative	This is a shipment for returning goods (see also zero quantity shipments for handling items that are removed but were never shipped). The option for creating this type of shipment is on the **More tasks** link. Only negative quantity items may be on the shipment. Negative shipments make sense only after a variation exists with items removed.
Zero quantity (or nil quantity)	When an item is added in a variation (or main contract) and subsequently removed, it is necessary to ship the positive and negative portions so that the claim correctly charges against both variations. An item is considered to be zero quantity when the quantity of that item was added then subsequently removed, and it is not used for moving items from one door to another.

Negative and zero shipments are fundamentally important to ensuring that claims are correct. Often negative shipments will be made only near the end of a project or when items are returned in perfect condition. Zero shipments should be made immediately prior to making a claim.

9.7.1 Searching for shipments

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Shipments**
- Search for shipments in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter shipments. See Entering shipments 154 and Packaging a shipment 157 .

Other functionality

By right clicking on a shipment in the list, you may:

Menu option	Description
Documents	Displays documents associated with the shipment and allows you to add new documents that will be associated with the shipment. See Working with documents 196 .
Communication	Displays communications associated with the shipment and allows you to add new communications that will be associated with the shipment. See Working with communications 195 .
Release shipment	Releases the shipment so it is locked, ready for packaging (or complete if negative or nil quantity shipment). See Releasing a shipment 157 .

Ship shipment	Ships the shipment after packaging is complete. See Shipping a shipment 159 .
Return shipment to data entry	Allows the shipment to be edited provided it has no dependent activity. See Returning a shipment for data entry 160 .
Print shipment	Prints or emails the shipment paperwork. See Printing a shipment 160 .

Click the **More tasks** link to:

Menu option	Description
Export products and prices (csv)	Creates a data file containing products and optionally cost and price. See Exporting products and prices to a csv file 163 .
Add shipment for negative quantity items	Adds a "negative" shipment. This type of shipment is for returning items. The shipment may have only negative items on it.
Add shipment for zero quantity items	Adds a "zero" shipment. This type of shipment is for balancing items than may have been added on the main contract then removed in a variation but were never shipped. The shipment may have only zero quantity items on it.

Negative and zero shipments are fundamentally important to ensuring that claims are correct. Often negative shipments will be made only near the end of a project or when items are returned in perfect condition. Zero shipments should be made immediately prior to making a claim.

9.7.2 Entering shipments

See the topic Searching for shipments 153 to learn how to add shipments.

Explanation of data fields

Data field	Description
Shipment no	The number that uniquely identifies this shipment within the project. Shipment numbers are generated automatically from the project number but you may change it to anything you like.
Date shipped	The date of the shipment. This date is compared to the claim date when determining if items are to be included in a claim or not.
Date ordered	Allows you to record when product was ordered.
Date expected	Allows you to record when product is expected on the building site.
Description	You may record a brief description of the shipment to make it easier to determine the purpose of each shipment when searching for shipments.
Contact	The contact person at the delivery address. This appears on the package address labels.
Phone	The contact person's phone number at the delivery address. This appears on the package address labels.
Delivery address	The address where the goods are to be shipped. This appears on the package address labels.
Shipment text	This is the body of the shipment cover document. Anything you enter here appears on the "Shipment cover page". See Printing a shipment 160 . Merge fields are available. See Shipment merge fields 266 for a description of fields and parameters. Right click on the document for more choices. **Options:**

	Replace text with template - Choose a new template to replace the quote text. To create templates, see Templates 60 . Insert paragraph - Insert a predefined paragraph at the cursor position. While this may be useful occasionally, it is recommended that you use a template for the shipment text rather than trying to build it from paragraphs each time. To create paragraphs, see Templates 60 . Insert field - Select a merge field to insert at the cursor position. See Merge fields 262 and Shipment merge fields 266 . Preview - Preview the shipment text with merge fields populated with data. Note: Some fields are filled with the data you are entering, but a number of fields, notably tables of data, are filled by examining saved data so until you save the shipment and re-open it the display of the preview will not be exact.
Items	The items on the shipment - see below.
Notes	General notes about the shipment. This text is for your internal use and is not printed.
Shipment is waiting on good to arrive.	Allows you to indicate if the shipment is waiting on goods and to record associated notes.
Transport company	Allows you to record the delivery company and associated noes.

Items

This tab shows the items included on your shipment. Click **Add** to select more items. See Adding items to a shipment 155 . When you create a shipment, the add windows is opened automatically.

The summary on the right gives information about the selected item.

Right click on an item to:

Option	Description
Remove	Removes the line from the shipment.
Remove items from all doors	Remove the inventory item on the selected item from all doors on the shipment. This is useful when you have added an item that is not ready to be shipped and saves having to remove it from each door individually.
Activity for this door	Shows activity for all inventory items on the door. See Door activity 114 .

Click **More tasks** to:

Option	Description
Check shipment and fix errors	Identifies and removes any errors from the shipment, including items that are not correct for the shipment type (see Working with shipments 153)

9.7.3 Adding items to a shipment

Part of the process of creating a shipment is to specify which doors and which items the shipment is to include.

Whenever you create a new shipment, you will be taken to the **Add Items To Shipment** window.

Also, at any time while you are editing a shipment you may select more items by clicking the **Add** button on the **Items** tab.

Range

Which doors do you want to include

Range	Description
Choose doors by	**All doors:** All doors are included in the selection.

	A selection of doors: The selected doors are included in the selection. Click the **Select doors** link to build up your selection of doors. **Doors in an area:** Doors in a single area are included in the selection. Choose an area from the list. **Doors in an stage:** Doors in a single stage are included in the selection. Choose a stage from the list.
Door types	Select one or more door types to restrict the range of doors in the selection. Not available when choosing a selection of doors.
Frame types	Select one or more frame types to restrict the range of doors in the selection. Not available when choosing a selection of doors.

Which quote do you want to add to the shipment

If you wish to restrict the items to a single quote, choose the quote from the list.

How do you want to process items requiring finishing that are not yet finished

If you use finishing in your project, chose how unfinished items are handled:

Option	Description
Do not add anything to the shipment	If your selection includes anything that need to be finished, and those items are not marked as being finished, then nothing is added to your shipment.
Do not add doors with unfinished items to the shipment	For each door selected, if there are any items on that door that need to be finished, and those items are not marked as being finished, then nothing on that door is added to your shipment, however all other doors are added.
Do not add unfinished items to the shipment	Any items that need to be finished where those items are not marked as being finished are not added to your shipment, however all other items are added.
Add items to the shipment even when they require finishing	Finishing is disregarded when choosing items for shipment, and unfinished items may be included in the shipment

Options

Options are provided to restrict the selection of items to those which are logically correct. You may change this to alter your selection and that may be useful as you build the shipment. When the shipment is released it is checked (see Releasing a shipment 157) and if items are not correct for the shipment type (see Working with shipments 153) then they must be corrected before the shipment may be released.

Which items do you want to add to the shipment

You may select or deselect inventory items to further control the selection process.

> Regardless of what choices you make, only doors that appear on an **accepted** quote are able to be added to a shipment.
> Regardless of what choices you make, door inventory that appear on another shipment is automatically excluded.

After you click **Add** to add the matching items to your shipment, you are informed of the number of items added and the selection window remains open with the same choices so you may easily alter your criteria and add more doors.

9.7.4 Releasing a shipment

Prior to a shipment being released, it is in entering status. While an shipment is entering, you may print some of the paperwork but it is strongly recommended that you release the shipment first so it may not be altered.

The process of releasing a shipment checks the shipment for validity then flags it as released.

When a shipment is released, one of two things happen. If it is a standard shipment then the shipment changes to "Released" at which time packaging (see Packaging a shipment[157]) may proceed. If the shipment is a negative or nil quantity shipment then it is immediately progressed to complete as there is no need to package these types of shipments.

A released shipment may not be altered unless you return it for data entry. See Returning a shipment for data entry[160].

From a released shipment you print the packaging worksheets and labels. See Printing a shipment[160].

A shipment must be released before is may be packaged. See Packaging a shipment[157].

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Shipments**
- Search for shipments in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Right click on the shipment and choose **Release shipment**.

When the shipment is released an extensive check is performed. If there are any errors, you will be notified and you must open the shipment (see Entering shipments[154]) and rectify the errors.

The types of things that are checked when a shipment is released are:

- The shipment may not be empty.
- The quantities are correct.
- Items being shipped are not already included in another shipment.
- All items in the shipment are correct for the shipment type (normal, negative or nil quantity).

9.7.5 Packaging a shipment

When a normal shipment (see Working with shipments[153]) is released (see Releasing a shipment[157]), it is in the **released** state waiting for packaging to be completed before shipping (see Shipping a shipment[159]). This topic discusses the packaging process.

Overview of packaging

The way which you use the packaging functionality depends somewhat on how your business operates. The procedure below is our recommendation and you may adapt this and the way you package to your own liking.

The following recommendation assumes you have some items flagged in your project inventory (see Adding project inventory[96]) as ship separate.

1. Finish entering the shipment (see Entering shipments[154])
2. Release the shipment (see Releasing a shipment[157])

Now at this time we will do some initial packaging to handle ship-separate items.

3. Open the shipment packaging window. Package the ship separate items (see below for more information).
4. Print (see Printing a shipment 160) the following: Picking form, Packing list worksheet by door, Door labels.
5. Assembly staff pick product
6. Assembly staff package door items, seal door packages and fix correspond door label. Ship separate items are labelled and boxed at the same time.
7. Doors are placed in boxes, and the **Packing list worksheet by door** report is written on to record the box number. As boxes are full and stacked, it is recommended that the box number is written on each box using a permanent marker. Try to be logical in the packaging of doors into boxes as it makes data entry easier and also makes it easier on site to find stuff.
8. The **Packing list worksheet by door** report is used to record the actual packaging for each door (see below for more information).
9. Ship the shipment (See Shipping a shipment 159)
10. Print (see Printing a shipment 160) reports that accompany the shipment. Print Package contents labels. Print Package address labels if required.
11. Affix the package contents labels to the boxes where you previously (step 7 above) indicated with a marker.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Shipments**
- Search for shipments in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Select the shipment and click **Properties**. Because the shipment is released (and therefore waiting for packaging to be performed), the **Shipment Packaging** window is opened instead of the regular shipment window.
- Click on the **Items and Packaging** tab - that is where the packaging is recorded.

Tools for packaging are on the right.

Box

This is where you add and remove boxes.

The drop down list shows all boxes that have been created.

You may choose the "current box" from the list, or click **Add a box** to create a new one. You may give a box a description. Often the description adds no value, but when you use the **Pack "ship separate" item** tool it creates boxes and creates a description based on the part code being packaged. If boxes are not numbered consecutively because you have removed boxes, the add function will pick the first gap.

The **Remove** link removes the box being displayed in the drop down list and disassociates it from all items.

Pack door

This tool is used for packaging the door that is highlighted on the list into the box that is shown at the top right in the box section.

When you click **Put door in this box**, all un-boxed items on the door that are not ship-separate are put into the chosen box.

If you check **Rebox items that are already in a box** then items on the door that are already in boxes are removed from the boxes and put into the new box.

If you check **Include "ship separate" items** then the ship separate items are treated the same way as other items on the door. This is useful for tiny variation shipments where there is not enough product to pack separately.

Pack "ship separate" item

This is the tool for packaging up items that are too large to package with other door items.

The drop down list contains any items in your project inventory that have been flagged as "Ship separate". See Adding project inventory 96 .

Choose an item, choose how many are packaged in a box and click **Make boxes and put items in boxes**.

Repeat this process for all ship separate items.

For example, closes may come from the manufacturer in an outer containing 6 closes, so you would choose the item, enter the quantity as 6 and click the button.

Pack item

Put selected item in this box: The selected item is put in the chosen box.

Put all unboxed of selected item in this box: All of the selected item that is not in a box is placed in the selected box.

Put all unboxed items in this box: Everything that is not in a box is placed in the selected box.

Pack item with "ship separate" item

This is the tool for packaging an item together with a "ship separate" item that has already been packaged.

The first drop down list is the item you want to package.

The second drop down list is the "ship separate" item that is already packaged.

Choose an item and the ship separate item, then click **Put item with "ship separate" item**.

The following restrictions apply (any items that do not meet these criteria are skipped):

- The item being packaged must not already be packaged.
- The "ship separate" item must exist on the same door and must already be packaged.
- If the "ship separate" item has quantity 2 or more and is in multiple boxes, the item being packaged with it is put into only the first box.

Remove item from box

To remove an item from the box assigned to it, right click on the item and choose **Unpackage this item**.

9.7.6 Shipping a shipment

Prior to a shipment being shipped, it is in released status. While an shipment is released, you may print the packaging worksheets and labels and record the packages used.

The process of shipping a shipment checks the shipment packaging for validity then flags it as complete.

A complete shipment may not be altered unless you return it for data entry. See Returning a shipment for data entry 160 .

From a completed shipment you print the packaging paperwork. See Printing a shipment 160 .

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Shipments**
- Search for shipments in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Right click on the shipment and choose **Ship shipment**.

When the shipment is shipped, checks on the packaging are performed. If there are any errors, you will be notified and you must open the shipment for packaging (see Packaging a shipment 157) and rectify the errors.

The types of things that are checked when a shipment is shipped are:

- Each item must be assigned to a package.
- The packaged quantities are correct.
- Each package must contain items.
- Packages are numbered consecutively starting from 1.

9.7.7 Returning a shipment for data entry

Once a shipment is released or packaged, it may not be altered.

If the situation arises where you have released a shipment and you need to amend it, then you must return it to data entry.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Shipments**
- Search for shipments in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Right click on the quote and choose **Return shipment to data entry**.

Notes

A shipment may be returned to data entry only none if the items appear on a claim.

9.7.8 Printing a shipment

Prior to a shipment being released, it is in entering status. While a shipment is entering, you may print the paperwork, but it is flagged as PROOF.

Normally, paperwork for assembling the shipment such as the picking form, packing list worksheet by door and door labels would be printed when the shipment is in the released state. The remainder of the paperwork, being the reports to accompany the shipment and package address labels and package contents labels are printed after the shipment is assembled and the package numbers used for each door are entered into the project in ProMaster Hardware. This way the package information on the customer paperwork and package content labels reflect the doors packed into each box.

If you print reports while the shipment is in the entering state, these pre-release printouts are for checking, and you should not use them for distribution or packaging.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Shipments**
- Search for shipments in the same manner that other ProMaster Hardware searches are performed.
- Right click on the shipment and choose **Print**.

The reports

Report	**Description**
Picking form	Produces a picking list of the product required for this shipment. **Options:** Show picker box - places a section at the footer of the report to record who picked the product.
Packing list worksheet by door	Produces a door by door list of all items in the shipment. Any items that have been assigned a box have the box number displayed, and remaining items have a place for the assembly person to write the box number. **Options:** Start each area on a new page - Removes the area column and places an area heading at the top of each change or area. Each area is started on a new page. Show handing - Choose if handing is shown for each door. Can be used for configuring locks while shipping. **Notes:** When the door items are packaged and assembled into boxes, the assembler writes the box numbers on this report. This is then used for recording the packaging (see Packaging a shipment 157) so the shipment paperwork may be printed to include with the shipment.
Door list with products	Produces a door by door list of all items in the shipment. Useful particularly for negative and nil quantity shipments. **Options:** Start each area on a new page - Removes the area column and places an area heading at the top of each change or area. Each area is started on a new page.
Shipment cover page	This prints the shipment cover page. Frequently there is no need for this report but it does provide a unified way to attach a cover document to a shipment. **Notes:** The contents and layout of this report are controlled by the text and merge fields that you enter when creating the shipment.
Packing list by package	Produces a list of each product and quantity in each package. This report may be used to accompany the shipment, and should be printed only after the packaging has been recorded (see Packaging a shipment 157).
Packing list by door	Produces a list of doors in the shipment, and for each shows the quantity of each item in each box that belongs to the door. This report may be used to accompany the shipment, and should be printed only after the packaging has been recorded (see Packaging a shipment 157). **Options:**

	Start each area on a new page - Removes the area column and places an area heading at the top of each change or area. Each area is started on a new page.
Packing list by product	Produces a list of each product in the shipment, and for each shows the quantity in each box. This report may be used to accompany the shipment, and should be printed only after the packaging has been recorded (see Packaging a shipment 157).
Shipment summary	Produces a list of each product in the shipment, and for each shows the quantity of each.
Door labels	Produces labels to identify each door bag containing door items prior to the bag being placed in a box. **Options:** Layout - Choose the label size you use. Range - Choose how ship-separate items are handled. You may wish to produce labels for everything, for ship separate items or everything but ship separate items.
Package address labels	Produces labels for each package with the delivery address. **Options:** Layout - Choose the label size you use. Show box count - when checked, boxes are numbered "n of m" on the labels.
Package contents labels	Produces labels to place on each package to show what doors are inside the box. **Options:** Show box count - when checked, boxes are numbered "n of m" on the labels.

Inventory display options

These options control the way inventory is presented.

Option	Description
Use short code for inventory part code	Available if your project uses short part codes. If checked, the short code to be used in place of the inventory part code.
Show inventory part code	Available if you have selected to use short codes on the report. If checked, the description to be prefixed with the part code.
Show inventory brand	If checked, the inventory brand is shown on the report.
Show inventory finish	If checked, the inventory finish is shown on the report.

Options

Click the **More options** link for additional options.

Here is an explanation of the option choices:

Option	Description
Show package separator line	Uses a line to separate packages. this layout option should remain on to increase readability unless you have a specific need to remove lines.
Show door separator line	Uses a line to separate doors. This layout option should remain on to increase readability unless you have a specific need to remove the lines.
Show inventory separator line	Uses a line to separate inventory items. This layout option should remain on to increase readability unless you have a specific need to remove the lines.

Merge all reports into a single PDF file when emailing	Merges all reports into a single PDF when emailing, and is therefore attached as a single attachment. The PDF may contain a mix of portrait and landscape reports.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports 276 for more information.
Email	The report is sent via email as a PDF attachment.

9.7.9 Exporting products and prices to a csv file

This export produces data files that extract the prices on a shipment so that this data may be manipulated externally.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Shipments**
- Search for shipments in the same manner that other ProMaster Hardware searches are performed.
- Select the shipment you want.

Exporting data

- Click on the **More tasks** link then choose **Export products and costs (CSV)**.

A simple wizard steps you through the process of choosing where the data will be written, choosing which data to export and choosing export options.

Destination

Choose the destination for the data files.

Data selection

Multiple types of data may be exported at the same time. Each type of data is written to a separate file, named according to the type of data.

9.7.10 Moving items to a new shipment

After an shipment is released and some items are boxed you may find yourself needing to take items off the shipment and put them on a new shipment (e.g. The product manufacturer has not fulfilled the order as expected).

This function allows you to remove non-boxed items from a released shipment and place them onto a new shipment.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Shipments**
- Search for shipments in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Right click on the shipment and choose **Move items onto this shipment from another shipment**.
- A wizard steps you through the process.
- A list shipments with items that may be moved is shown. Choose the shipment from which to remove items.
- A list of products that are candidates for moving is shown. Select one or more products.
- A list of doors with items that are candidates for moving are shown. Select one or more doors.

Each choice depends on your earlier choices to narrow the selection.

A list of everything that will be moved is shown. Click **Finish** to make the change.

> Exercise caution. While you may remove items from a "released" shipment and place them on an "entering" shipment, the process is not reversible. There is no way to add items to a "released" shipment. If you think there is a chance that of making a mistake, make a project snapshot first. See Creating a project snapshot 93

9.8 Working with installations

Installs are the process where the you select doors (for example on a area by area basis) that have items requiring installation, and put them together as a set of instructions for the installer to work from.

> Installs cover both dryfit and install.

There are three types of installs:

Install type	Description
Normal (or positive)	This is a normal install where you fit items to doors. The **Add** button produces this type of install. Only positive quantity items may be on the install.
Negative	This is a uninstall for returning goods (see also zero quantity installs for handling items that are removed but were never shipped or installed). The option for creating this type of install is on the **More tasks** link. Only negative quantity items may be on the install. Negative installs make sense only after a variation exists with item installs removed.
Zero quantity (or nil quantity)	When an item is added in a variation (or main contract) and subsequently removed, it is necessary to install the positive and negative portions so that the claim correctly charges against both variations. An item is considered to be zero quantity when the quantity of that item was added for install then

	subsequently removed, and it is not used for moving items from one door to another.

Negative and zero installs are fundamentally important to ensuring that claims are correct. Often negative installs will be made only near the end of a project or when the items are returned in perfect condition. Zero installs should be made immediately prior to making a claim.

9.8.1 Searching for installs

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Installs**
- Search for installs in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter installs. See Entering installs 166.

Other functionality

By right clicking on an install in the list, you may:

Menu option	Description
Move items onto this install from another install	Allows items from another "in progress" install to be removed and placed on the selected install. See Moving items onto a new install 173
Documents	Displays documents associated with the install and allows you to add new documents that will be associated with the install. See Working with documents 196.
Communication	Displays communications associated with the install and allows you to add new communications that will be associated with the install. See Working with communications 195.
Release install	Releases the install so it is locked, ready for printing and marking items as installed (or complete if negative or nil quantity install). See Releasing an install 168.
Complete install	Marks the install as complete. See Completing an install 170.
Return install to data entry	Allows the install to be edited provided it has no dependent activity. See Returning an install for data entry 168.
Print install	Prints or emails the install paperwork. See Printing an install 170.
Export install instructions (XML)	Exports data for use by the installer. See Exporting install instructions to an xml file 173.

Click the **More tasks** link to:

Menu option	Description
Add install for negative quantity items	Adds a "negative" install. This type of install is for uninstalling items. The install may have only negative items on it.
Add install for zero quantity items	Adds a "zero" install. This type of install is for balancing items than may have been added on the main contract then removed in a variation but were never install. The install may have only zero quantity items on it.

Negative and zero installs are fundamentally important to ensuring that claims are correct. Zero installs should be made immediately prior to making a claim.

9.8.2 Entering installs

See the topic Searching for installs [165] to learn how to add installs.

Explanation of data fields

Data field	Description
Install no	The number that uniquely identifies this install within the project. Install numbers are generated automatically from the project number but you may change it to anything you like.
Installer	The associate performing the installation.
Date requested	The date of the install. This date is compared to the claim date when determining if items are to be included in a claim or not.
Description	You may record a brief description of the install to make it easier to determine the purpose of each install when searching for installs.
Install text	This is the body of the install cover document. Anything you enter here appears on the "Install cover page". See Printing an install [170]. Merge fields are available. See Install merge fields [268] for a description of fields and parameters. Right click on the document for more choices. **Options:** Replace text with template - Choose a new template to replace the install text. To create templates, see Templates [60]. Insert paragraph - Insert a predefined paragraph at the cursor position. While this may be useful occasionally, it is recommended that you use a template for the install text rather than trying to build it from paragraphs each time. To create paragraphs, see Templates [60]. Insert field - Select a merge field to insert at the cursor position. See Merge fields [262] and Install merge fields [268]. Preview - Preview the install text with merge fields populated with data. Note: Some fields are filled with the data you are entering, but a number of fields, notably tables of data, are filled by examining saved data so until you save the install and re-open it the display of the preview will not be exact.
Items	The items on the install - see below.
QA notes	Provides a place to record information returned from the quality assurance inspection.
Notes	General notes about the install. This text is for your internal use and is not printed.
Notes from installer	Provides a place to record information returned from the installer.

Items

This tab shows the items included on your install. Click **Add** to select more items. See Adding items to an install [167]. When you create a install, the add windows is opened automatically.

The summary on the right gives information about the selected item.

Right click on an item to:

Option	Description
Remove	Removes the line from the install.
Remove items from all doors	Remove the inventory item on the selected item from all doors on the installation. This is useful when you have added an item that is not ready to

	be installed and saves having to remove it from each door individually.
Activity for this door	Shows activity for all inventory items on the door. See Door activity 114 .

Click **More tasks** to:

Option	Description
Check INSTALL and fix errors	Identifies and removes any errors from the install, including items that are not correct for the install type (see Working with installations 164)

9.8.3 Adding items to an install

Part of the process of creating an install is to specify which doors and which items the install is to include.

Whenever you create a new install, you will be taken to the **Add Items To Install** window.

Also, at any time while you are editing an install you may select more items by clicking the **Add** button on the **Items** tab.

Range

Which doors do you want to include

Range	Description
Choose doors by	**All doors:** All doors are included in the selection. **A selection of doors:** The selected doors are included in the selection. Click the **Select doors** link to build up your selection of doors. **Doors in an area:** Doors in a single area are included in the selection. Choose an area from the list. **Doors in an stage:** Doors in a single stage are included in the selection. Choose a stage from the list.
Door types	Select one or more door types to restrict the range of doors in the selection. Not available when choosing a selection of doors.
Frame types	Select one or more frame types to restrict the range of doors in the selection. Not available when choosing a selection of doors.

Which quote do you want to add to the install

If you wish to restrict the items to a single quote, choose the quote from the list.

Which shipment do you want to add to the install

If you wish to restrict the items to a single shipment, choose the shipment from the list.

Options

Options are provided to restrict the selection of items to those which are logically correct. You may change this to alter your selection and that may be useful as you build the install. When the install is released it is checked (see Releasing an install 168) and if items are not correct for the install type (see Working with installations 164) then they must be corrected before the insall may be released.

Options are provided to include or exclude dryfit and install. Normally an install would include dryfit and install.

Which items do you want to add to the install

You may select or deselect inventory items to further control the selection process.

> Regardless of what choices you make, only doors that appear on an **accepted** quote are able to be added to an install.
> Regardless of what choices you make, door inventory that appear on another install is automatically excluded.

After you click **Add** to add the matching items to your install, you are informed of the number of items added and the selection window remains open with the same choices so you may easily alter your criteria and add more doors.

9.8.4 Releasing an install

Prior to a install being released, it is in entering status. While an install is entering, you may print some of the paperwork but it is strongly recommended that you release the install first so it may not be altered.

The process of releasing an install checks the install for validity then flags it as released.

When a install is released, one of two things happen. If it is a standard install then the install changes to "Released" at which you can record the items that are installed (see Marking install items as complete 169). If the install is a negative or nil quantity install then it is immediately progressed to "complete" as there are no items to mark as installed.

A released install may not be altered unless you return it for data entry. See Returning an install for data entry 168.

From a released install you print the installation instructions. See Printing an install 170.

A install must be released before is may be marked as installed. See Marking install items as complete 169.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Installs**
- Search for installs in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Right click on the install and choose **Release install**.

When the install is released an extensive check is performed. If there are any errors, you will be notified and you must open the install (see Entering installs 166) and rectify the errors.

The types of things that are checked when a install is released are:

- The install may not be empty.
- The quantities are correct.
- Items being installed are not already included in another install.
- All items in the install are correct for the install type (normal, negative or nil quantity).

9.8.5 Returning an install for data entry

Once an install is released it may not be altered.

If the situation arises where you have released an istall and you need to amend it, then you must return it to data entry.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Installs**
- Search for installs in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Right click on the quote and choose **Return install to data entry**.

Notes

A install may be returned to data entry only if none of the items appear on a claim.

9.8.6 Marking install items as complete

When a normal (see Working with installations[164]) install is released (see Releasing an install[168]), it is in the **released** state waiting for items to be marked as completed. This topic discusses the process of marking items as complete.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Installs**
- Search for installs in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Select the install and click **Properties**. Because the install is released (and therefore waiting for items to be marked as complete), the **Record Install Completion** window is opened instead of the regular install window.
- Click on the **Items** tab - that is where the item completion is recorded.

Right click on an item for options. You will see the keyboard shortcuts for each task and will benefit greatly from using the keyboard shortcuts instead of continually right clicking.

Option	**Description**
Edit	Opens a window for editing the item. The windows allows you to change the dryfit and install flags and enter an installer's note.
Toggle dryfit	Toggles the dryfit complete flag on the current item.
Toggle install	Toggles the install complete flag on the current item.
Toggle dryfit and install	Toggles the dryfit complete and install complete flags on the current item.
Bulk change	Runs a wizard to bulk change. See below.
Import data from XML file	Allows you to select a file from your installer to import. The file sent to the installer (see Exporting install instructions to an xml file[173]) is in the correct format. The format must not be altered. The attributes **DryfitComplete**, **InstallComplete** and **InstallerNote** may be altered by the installer to reflect the installation status of an item. DryfitComplete and InstallComplete may be blank attributes ("") in which case they are ignored, or "T" for installed or "F" for not installed.
Revert to original values	Undoes changes to the current item.
Show all items Show incomplete items Show incomplete dryfit	Filters the list so you can more easily find items that are not complete.

Show incomplete install	

Bulk change install complete

The bulk change wizard allows you to select doors by area or stage, and select one or more inventory items to alter.

You must choose what will happen to the dryfit and install flags.

The doors that will be affected are shown before the change is applied.

Notes

Items that are marked as complete, then claimed, are locked and may not be changed to incomplete.

9.8.7 Completing an install

After all items on an install are marked as complete, you may mark the whole install as complete. Largely this is a housekeeping exercise to indicate that no further activity is required as once any item is marked as complete it may be claimed.

A complete install may not be altered unless you return it for data entry. See Returning an install for data entry 168.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Installs**
- Search for installs in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Right click on the install and choose **Complete install**.

9.8.8 Printing an install

Prior to an install being released, it is in entering status. While an install is entering, you may print the paperwork, but it is flagged as PROOF.

If you print reports while the install is in the entering state, these pre-release printouts are for checking, and you should not use them for distribution.

Release the install before printing the paperwork for your installer.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Installs**
- Search for installs in the same manner that other ProMaster Hardware searches are performed.
- Right click on the install and choose **Print**.

The reports

Report	Description
Install cover page	This prints the install cover page. Frequently there is no need for this report but it does provide a unified way to attach a cover document to a install.

	Notes: The contents and layout of this report are controlled by the text and merge fields that you enter when creating the install.
Install summary	Produces a summary by area, by product and by area and product. **Options:** Range = Choose all items, installed items or not-installed items. Show totals - shows totals at the end of each summary.
Install schedule	Produces a door by door schedule showing each item to be installed. This is the work instructions for the installer. **Options:** Range = Choose all items, installed items or not-installed items. Show doors notes - Show door notes after each door. Show handing - Show a column for the door handing. Show door type - Show a column for the door type. Show frame type - Show a column for the frame type. Show shipment - Prior to shipping the goods, this column will show no date. After the goods are shipped, this column shows shipments and boxes for each item. The installer can use this to locate the door items in the shipment without the need to refer to the shipment paperwork. Start each area on a new page - Removes the area column and places an area heading at the top of each change or area. Each area is started on a new page. Use compact layout - prints the report in portrait format instead of landscape, possibly resulting in fewer pages.
Quality assurance form	Produces a form, similar in layout to the schedule for completion by the installer and tester. **Options:** Show doors notes - Show door notes after each door. Show handing - Show a column for the door handing. Show door type - Show a column for the door type. Show installer's note - Shows any notes entered from the installer. Useful particularly when you reprint this report after installation information has been recorded. Show additional certification fields - Shows space for more information about installer, tester and final sign-off. Useful on projects that require a high level of accountability. Start each area on a new page - Removes the area column and places an area heading at the top of each change or area. Each area is started on a new page. Use compact layout - prints the report in portrait format instead of landscape, possibly resulting in fewer pages.
Door labels	Produces labels to identify each door. These should be printed on low-tack removable labels, not on regular label stock. They may be placed on or close to doors before installation work commences to identifying the door. **Options:** Layout - Choose the label size you use.
Door labels with item	Produces labels to identify each door, including items to be installed. These should be printed on low-tack removable labels, not on regular label stock. They may be placed on or close to doors before installation work commences to identifying the door. **Options:** Layout - Choose the label size you use. **Notes:**

	The items show the dryfit quantity and the install quantity. The range or doors printed is those that are included in the install. The items and quantities for each door do NOT come from the install. The come from the total of all installs that are released or complete and also this install. Because there is always a risk of the items on the label being non-current, the label includes the date and time that it was printed.

Inventory display options

These options control the way inventory is presented.

Option	Description
Use short code for inventory part code	Available if your project uses short part codes. If checked, the short code to be used in place of the inventory part code.
Show inventory part code	Available if you have selected to use short codes on the report. If checked, the description to be prefixed with the part code.
Show inventory brand	If checked, the inventory brand is shown on the report.
Show inventory finish	If checked, the inventory finish is shown on the report.

Options

Click the **More options** link for additional options.

Here is an explanation of the option choices:

Option	Description
Show door separator line	Uses a line to separate doors. This layout option should remain on to increase readability unless you have a specific need to remove the lines.
Show inventory separator line	Uses a line to separate inventory items. This layout option should remain on to increase readability unless you have a specific need to remove the lines.
Merge all reports into a single PDF file when emailing	Merges all reports into a single PDF when emailing, and is therefore attached as a single attachment. The PDF may contain a mix of portrait and landscape reports.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup[85]), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports[276] for more information.
Email	The report is sent via email as a PDF attachment.

9.8.9 Exporting install instructions to an xml file

An install may be exported to your installer as an XML file which can then be used with third party solutions to control the install, record installed items and provide an updated file with installation recorded to import back into ProMaster Hardware (see Marking install items as complete 169),

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Installs**
- Search for installs in the same manner that other ProMaster Hardware searches are performed.

Exporting data

- Right click on the install and choose **Export install instructions (XML)**.
- Select the file destination
- Various options are provided to control the file contents.

9.8.10 Moving items onto a new install

After an install is released and some items are complete you may find yourself needing to take items off the install and give them to another installer (e.g. to split the workload or because the first installer will not be completing the work). If the completed items have not been claimed you may return the install to data entry and carefully remove just those items that have not been marked as complete. If however any items have been claimed then this is not possible.

This function allows you to remove non-completed items from a released install and place them onto a new install.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Installs**
- Search for installs in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Right click on the install and choose **Move items onto this install from another install**.
- A wizard steps you through the process.
- If the project has dryfit and install, there will be a choice how to act.

Choice	Description
Move the install only if the dryfit is not complete and therefore it will be moved also	If there is dryfit and install on an item on a door, then neither will be moved unless they both can be moved.
Move the install even if the dryfit is complete	If there is dryfit and install on an item on a door, each may be moved if it is not complete, regardless of the complete/incomplete status of the other.

- A list installs with items that may be moved is shown. Choose the install from which to remove item.
- A list of products that are candidates for moving is shown. Select one or more products.
- A list of doors with items that are candidates for moving are shown. Select one or more doors.

Each choice depends on your earlier choices to narrow the selection.

A list of everything that will be moved is shown. Click **Finish** to make the change.

> Exercise caution. While you may remove items from a "released" install and place them on an "entering" install, the process is not reversible. There is no way to add items to a "released" install. If you think there is a chance that of making a mistake, make a project snapshot first. See Creating a project snapshot 93

9.9 Working with claims

Claiming is the process where ProMaster Hardware looks at the product shipped, and the parts of any installation requests that have been completed and at finishing that is complete, then assembles information for billing.

There are a few simple rules:

- Product is claimed after it appears on a **shipped** shipment.
- If product requires finishing, then finishing is claimed at the same time as the product shipment is claimed unless the supply is by another party in which case the finishing is claimed as soon as it can be after the finishing "finished" is recorded.
- Dryfit and install are claimed when they appear on a released or completed install and are flagged as completed.

9.9.1 Searching for claims

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Claims**
- Search for claims in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter claims. See Entering claims 175 .

Other functionality

By right clicking on a claim in the list, you may:

Menu option	**Description**
Documents	Displays documents associated with the claim and allows you to add new documents that will be associated with the claim. See Working with documents 196 .
Communication	Displays communications associated with the claim and allows you to add new communications that will be associated with the claim. See Working with communications 195 .
Release claim	Releases the claim so it is locked, ready for printing. See Releasing a claim 176 .
Return claim to data entry	Allows the claim to be edited provided it has no dependent activity. See Return a claim for data entry 176 .
Enter paid amount	Allows the amount paid and amount retained to be entered. These values are used by several merge fields on claims at the time the claim is released.

	If you update claims with these two values prior to releasing a claim, the claim merge fields will allow you to show amounts paid, retained and outstanding. Changing these values does not alter any released claim.
Print claim	Prints or emails the claim paperwork. See Printing a claim 177 .

Click the **More tasks** link to:

Menu option	**Description**
Export products and prices (csv)	Creates a data file containing products and optionally cost and price. See Exporting products and prices to a csv file 178 .
Export all claimed items (csv)	Creates a data file containing all items from the project that have been claimed. This can be a useful file to provide when claims are queried. See Exporting all claimed items 179 .
Export claim to E3	Places data about the claim on the clipboard for use by E3. Available only if E3 integration is enabled in the Application parameters 37 .

9.9.2 Entering claims

See the topic Searching for claims 174 to learn how to add claims.

The claim totals are shown on the first tab.

Explanation of data fields

Data field	**Description**
Claim no	The number that uniquely identifies this claim within the project. Claim numbers are generated automatically from the project number but you may change it to anything you like.
Clam date	The date of the claim. This is used to determine what items are to be claimed.
Associate	The person who the claim is addressed to.
Price annotation	A message regarding the prices. Typically you will have a message saying that the prices exclude GST, VAT or other taxes. See Application parameters 37 to set a default value for new claims.
Claim text	This is the body of the main claim document. Anything you enter here appears on the "claim cover sheet". See Printing a claim 177 . Merge fields are available. See Claim merge fields 269 for a description of fields and parameters. Right click on the document for more choices. **Options:** Replace text with template - Choose a new template to replace the claim text. To create templates, see Templates 60 . Insert paragraph - Insert a predefined paragraph at the cursor position. While this may be useful occasionally, it is recommended that you use a template for the claim text rather than trying to build it from paragraphs each time. To create paragraphs, see Templates 60 . Insert field - Select a merge field to insert at the cursor position. See Merge fields 262 and Claim merge fields 269 . Preview - Preview the claim text with merge fields populated with data. Note: Some fields are filled with the data you are entering, but a number of fields, notably tables of data, are filled by examining saved data so until you save the claim and re-open it the display of the preview will not be exact.

Items	The items on the claim. See below.
Notes	Notes for your internal use. These notes are not printed.

> It is recommended that you define one or more templates (see Templates[60]) and always start by choosing "Replace text with template" to use a template, then remove anything from the text that is not applicable to your claim.

Items

This tab shows the items included on your claim.

Click **Find items to claim** to find items to add to the claim and remove items that should not be on the claim.

The **claim date** is used to determine which shipments and installs to include.

9.9.3 Releasing a claim

Prior to a claim being released, it is in entering status. While an claim is entering, you may print the paperwork, but it is flagged as PROOF.

The process of releasing a claim checks the claim for validity then flags it as released.

A released claim may not be altered unless you return it for data entry. See Return a claim for data entry[176].

From a released claim you print the official paperwork. See Printing a claim[177].

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Claims**
- Search for claims in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Right click on the quote and choose **Release claim**.

When the claim is released an extensive check is performed. If there are any errors, you will be notified and you must open the claim (see Entering claims[175]) and rectify the errors.

9.9.4 Return a claim for data entry

Once a claim is released, it may not be altered.

If the situation arises where you have released a claim and you need to amend it, then you must return it to data entry.

> If a claim has been released and printed, you should exercise great caution in running this process so that you do not provide conflicting paperwork for the claim.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Claims**
- Search for claims in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Right click on the claim and choose **Return claim to data entry**.

9.9.5 Printing a claim

Prior to a claim being released, it is in entering status. While a claim is entering, you may print the paperwork, but it is flagged as PROOF.

The pre-release printouts are for checking, and you should not use them for distribution.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Claims**
- Search for claims in the same manner that other ProMaster Hardware searches are performed.
- Right click on the claim and choose **Print**.

The reports

Report	Description
Claim cover sheet	This prints the main claim document. **Notes:** The contents and layout of this report are controlled by the text and merge fields that you enter when creating the claim.
Claim summary	Shows for each product, the charges for product supply, dryfit, install and finishing that are on this claim. **Options:** Show prices - Turn off to suppress prices on jobs where unit prices are not disclosed.
Claim detail	Shows a complete breakdown of charges by door, item and change type. **Options:** Show prices - Turn off to suppress prices on jobs where unit prices are not disclosed. Show doors notes - Show door notes after each door. Start each area on a new page - Removes the area column and places an area heading at the top of each change or area. Each area is started on a new page. Use compact layout - prints the report in portrait format instead of landscape, possibly resulting in fewer pages.
Claim install costs	Shows the costs (from your installer) for the installation of each item on the claim. **Options:** Show prices - Show the price the installation was sold for. **Notes:** Since this report includes cost prices, as a safety measure you are unable to email this report at the same time that you generate any other reports.

Inventory display options

These options control the way inventory is presented.

Option	Description
Use short code for inventory part code	Available if your project uses short part codes. If checked, the short code to be used in place of the inventory part code.

Show inventory part code	Available if you have selected to use short codes on the report. If checked, the description to be prefixed with the part code.
Show inventory brand	If checked, the inventory brand is shown on the report.
Show inventory finish	If checked, the inventory finish is shown on the report.

Options

Click the **More options** link for additional options.

Here is an explanation of the option choices:

Option	Description
Show door separator line	Uses a line to separate doors. This layout option should remain on to increase readability unless you have a specific need to remove the lines.
Show inventory separator line	Uses a line to separate inventory items. This layout option should remain on to increase readability unless you have a specific need to remove the lines.
Merge all reports into a single PDF file when emailing	Merges all reports into a single PDF when emailing, and is therefore attached as a single attachment. The PDF may contain a mix of portrait and landscape reports.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports 276 for more information.
Email	The report is sent via email as a PDF attachment.

9.9.6 Exporting products and prices to a csv file

This export produces data files that extract the prices on a claim so that this data may be manipulated externally.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Claims**
- Search for claims in the same manner that other ProMaster Hardware searches are performed.
- Select the claim you want.

Exporting data

- Click on the **More tasks** link then choose **Export products and costs (CSV)**.

A simple wizard steps you through the process of choosing where the data will be written, choosing which data to export and choosing export options.

Destination

Choose the destination for the data files.

Data selection

Multiple types of data may be exported at the same time. Each type of data is written to a separate file, named according to the type of data.

9.9.7 Exporting all claimed items to a csv file

This export produces data files that extract all items from all released claims.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Claims**

Exporting data

- Click on the **More tasks** link then choose **Export all claimed items (CSV)**.

A simple wizard steps you through the process of choosing where the data will be written, choosing which data to export and choosing export options.

Destination

Choose the destination for the data files.

9.10 Working with variations

Variations are the process of altering a project after it is in progress, and tracking those changes to separate requests and authorisations.

Until a project has been quoted, and the quote accepted, variations are not applicable.

After the initial project has been quoted and accepted, the project is considered to be in progress. If you try to make a change, such as adding a door or changing inventory on a door, you will be notified that there is no active variation.

To make your changes to the project you must create a variation. Having created a variation, then all changes you do are recorded against that variation, up to the point where the variation is quoted and the quote is released. Once your variation is quoted and the quote released, it becomes locked, prohibiting further changes.

The process of quoting on a variation is substantially the same as your original quote, with the notable exceptions that you may not offer alternatives on a variation quote.

Only one variation may be in the Entering status at any time, so that at all times you know when you make a change it is being recorded against the correct variation.

Just like your original quote, the quote in a variation must be accepted before the goods may be shipped, installed or claimed.

9.10.1 Entering variations

When a project is created, the main contract, or "Variation 0" is created automatically. After the main contract is quoted, you must create a variation before any changes to the project are allowed.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Variations**
- Search for variations in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter variations.

At a minimum you must select the associate that requested the variation and the required date.

The description is provided so you can add an annotation.

If you have an authorisation number, you may record this now, but it is more likely the authorisation number will be entered when you accept the quote for the variation.

You may record any amount of notes about the variation.

> If you have licensed the **Estimating** module, then you may choose if a variation is for standard project alterations or if it for an estimate. An **Estimate** variation behaves exactly the same as a **Standard** variation up until the time when you create the estimate. When the estimate is created, the changes made under the variation are recorded in the estimate and then removed from the main project and the variation is also removed leaving no trace other than the **Estimate**. See Working with estimates 181 .

Removing a variation

If the variation may be removed, then the removal will proceed.

A variation may not be removed once it has any activity recorded against it. If you want to remove a variation, you must first remove all changes (inventory items on doors and doors) that were made as part of the variation.

To remove a variation and all its activity see Removing a variation and all associated changes 181 .

Notes

Now you have added a variation you will:

- Add or remove doors
- Add or remove inventory items on doors
- Make a quote
- Release the quote
- Accept the quote

A variation may not be edited once it has been quoted and the quote released.

9.10.2 Removing a variation and all associated changes

If you have added a variation and then made changes to door inventory (and possibly added doors also), the variation and its activity may be removed provide it has not been quoted. If you have created a quote then you must first remove the quote before using this procedure.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Variations**
- Search and select the last variation.

Making a change

Click on the **More tasks** link then choose **Remove variation and all associated activity**.

A brief summary of the door activity in the variation is shown.

You must enter a confirmation code before proceeding. That should stop any rash removals that you may later regret!

Notes

For a variation to be able to removed by this process, all the following must hold true.

- The project must be editable.
- The variation must be in the Entering state.
- The must be no more recent variation.
- There must be no quotations using the variation or any doors created by the variation.
- There must be no shipments using the variation or any doors created by the variation.
- There must be no installation requests using the variation or any doors created by the variation.
- There must be no claims using the variation or any doors created by the variation.

If all these conditions are met, then this procedure will back-out all door changes created as part of this variation.

9.11 Working with estimates

Estimates allow door and door inventory changes to be recorded on the project as a special type of variation that is then converted to an estimate and the changes record in the variation are backed out of the project. The estimate is then priced in much the same manner as a quote and then release, from which state it is printed and submitted for approval. At a later time the estimate may be accepted and then the changes recorded in the estimate are applied to the project in a new variation.

> The estimates module, available for the Premium edition, is licensed as a separate feature to the main product. Contact WH Software Limited (See Contacting WH Software Limited 6) or your ProMaster Hardware reseller for more information.

When you create an estimate, you start by creating a variation (See Entering variations 180) and set the **Variation type** to **Estimate**.

Things to note are:

- An estimate always includes all activity in that estimate variation.

- Adding then saving a new estimate effectively locks the contents of the estimate (other than pricing and documentation) and backs the changes out from the project.
- Each item that appears on the estimate is priced.
- When the estimate is accepted, the changes in the estimate are applied to the project.

9.11.1 Searching for estimates

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Estimates**
- Search for estimates in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter estimates. See Entering estimates 183 .

Other functionality

By right clicking on an estimate in the list, you may:

Menu option	Description
Documents	Displays documents associated with the estimate and allows you to add new documents that will be associated with the estimate. See Working with documents 196 .
Communication	Displays communications associated with the estimate and allows you to add new communications that will be associated with the estimate. See Working with communications 195 .
Release estimate	Releases the estimate so it is locked, ready for printing. See Releasing an estimate 186 .
Accept estimate	Accepts the estimate that the customer has accepted and apply the estimate changes to the project. See Accepting an estimate 186 .
Return estimate to data entry	Allows the estimate to be edited. See Returning an estimate for data entry 187 .
Print estimate	Prints or emails the estimate paperwork. See Printing an estimate 187 .

Click the **More tasks** link to:

Menu option	Description
Copy to clipboard	Places data about the estimate on the clipboard for use in other programs. See Copying estimate data to the clipboard 190 .
Export products and prices (csv)	Creates a data file containing products and optionally cost and price. See Exporting products and prices to a csv file 190 .
Export door product matrix (csv)	Creates a data file with a matrix of doors and products. See Exporting a door product matrix to a csv file 191 .

9.11.2 Entering estimates

See the topic Searching for estimates[182] to learn how to add estimates.

The estimate totals and margins are shown on the first tab.

Explanation of data fields

Data field	Description
Estimate no	The number that uniquely identifies this estimate within the project. Estimate numbers are generated automatically from the project number but you may change it to anything you like.
Estimate date	The date of the estimate.
Associate	The person who the estimate is addressed to.
Price annotation	A message regarding the prices. Typically you will have a message saying that the prices exclude GST, VAT or other taxes. See Application parameters[37] to set a default value for new quotes and estimates.
Estimate text	This is the body of the main estimate document. Anything you enter here appears on the "Estimate cover sheet". See Printing an estimate[187] . Merge fields are available. See Estimate merge fields[272] for a description of fields and parameters. Right click on the document for more choices. **Options:** Replace text with template - Choose a new template to replace the estimate text. To create templates, see Templates[60] . Insert paragraph - Insert a predefined paragraph at the cursor position. While this may be useful occasionally, it is recommended that you use a template for the estimate text rather than trying to build it from paragraphs each time. To create paragraphs, see Templates[60] . Insert field - Select a merge field to insert at the cursor position. See Merge fields[262] and Estimate merge fields[272] . Preview - Preview the estimate text with merge fields populated with data. Note: Some fields are filled with the data you are entering, but a number of fields, notably tables of data, are filled by examining saved data so until you save the estimate and re-open it the display of the preview will not be exact.

It is recommended that you define one or more templates (see Templates[60]) and always start by choosing "Replace text with template" to use a template, then remove anything from the text that is not applicable to your estimate.

Inventory

This tab shows the items included on your estimate. The items are calculated automatically from the doors and door inventory in the current estimate variation. On this tab you perform the costing for each inventory item.

The summary on the right gives information about the selected item.

The summary at the bottom are the totals for the estimate, the same information that is displayed on the first tab "Estimate".

Right click on an item to:

Option	Description
Edit prices	Edit the item prices. See Pricing an estimate[184] .

Show doors for this item	Shows the doors what contribute to the quantities for the item.
Sort by inventory order Sort by part code	Changes the way items are displayed in the estimate. This is used only during editing and whenever the estimate is printed etc the inventory order is always used.

Click **More tasks** to:

Option	**Description**
Set all prices as mark-up from cost	See Changing the margin on all items[185] .
Set all prices as discount from retail	See Changing the margin on all items[185] .
Allow under-cost estimate to be released	When a estimate is saved, checks are performed on the prices and margins to ensure that prices are entered and that items are not being sold below cost. If price conditions are not met then the estimate is flagged as incomplete and it is not able to be released. If you have set all the prices you want and are intentionally selling below cost then immediately prior to saving the estimate, select this option and the checking will be relaxed to allow the estimate to be released. This option is available only if your login has permissions to use it. See Users[36] .

9.11.3 Pricing an estimate

For each inventory item that appears on an estimate, you must perform the pricing process.

You must set prices for the product, dryfit, installation and finishing as appropriate.

ProMaster Hardware offers initial prices based on the prices stored project inventory prices (see Default project inventory prices[100]).

Pricing a product

For each of the product, dryfit, installation and finishing you should complete:

- The **Cost** to you.
- The **Retail** price if you are calculating prices from the retail.
- How the **Calculation** is to be performed (discount from retail or mark-up from cost).
- The **Percent** for the calculation

Additionally, you may enter the **Price** or the **Total** and ProMaster Hardware will use these numbers for the calculation of the percent.

When you have finished costing the item, click **OK** to save it.

Copying prices

Click **Copy prices** to peruse historical price usage and apply them to this alternative. See Copying prices from historical usage[185] .

9.11.4 Changing the margin on all items

Mark-up from cost

To set all items to use mark-up from cost and to have the same percentage applied.

- Click the **More tasks** link on the estimate window and choose **Set all prices as markup from cost**.

Enter the mark-up percentage you want.

Choose what you want to apply it it (Product, dryfit, installation, finishing)

> You are warned if any items do not have a cost price.

Discount from retail

To set all items to use discount from retail and to have the same percentage applied.

- Click the **More tasks** link on the estimate window and choose **Set all prices as discount from retail**.

Enter the discount percentage you want.

Choose what you want to apply it it (Product, dryfit, installation, finishing)

> You are warned if any items do not have a retail price.

9.11.5 Copying prices from historical usage

At the bottom of the **Pricing** window is a link **Copy prices**.

In determining your price you may choose to consider the recent history of the product.

This link opens a window for viewing historical usage and copying prices.

It shows prices for the item from various sources where it has appeared in the past 2 years.

Prices are shown from:

- Global inventory
- Default project inventory prices from this project
- Quote prices from other quotes in this project
- Default project inventory prices from other projects
- Quote prices from other quotes in other projects

After global prices and prices from this project, all remaining prices are sorted in reverse date order.

Filtering

To restrict the items shown, enter some text in the **Look for** text box and click **Apply**.

Every word you enter in the **Look for** text box must appear on the one line within the project number, project description or quotation number.

Using a historical price

Select the line containing the prices you want.

At the bottom of the window there are controls for product, dryfit, installation and finishing as appropriate for the item you are editing.

Various links will be available (Set cost, Set retail, Set calc and Set all) depending on what information is available for copying.

Click the links required to copy prices.

Click **OK** to accept the prices you have set and return to the pricing window.

9.11.6 Releasing an estimate

Prior to an estimate being released, it is in entering status. While an estimate is entering, you may print the paperwork, but it is flagged as PROOF.

The process of releasing an estimate checks the estimate for validity then flags it as released.

A released estimate may not be altered unless you return it for data entry. See Returning an estimate for data entry 187.

From a released estimate you print the official paperwork. See Printing an estimate 187.

An estimate must be released before is may be accepted. See Accepting an estimate 186.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Estimates**
- Search for estimates in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Right click on the estimate and choose **Release estimate**.

When the estimate is released an extensive check is performed. If there are any errors, you will be notified and you must open the estimate (see Entering estimates 183) and rectify the errors.

9.11.7 Accepting an estimate

After an estimate is entered, released and printed, there comes a time when you receive the acceptance and want to turn the estimate into a part of the project .

An estimate must be released before is may be accepted.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Estimates**
- Search for estimates in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Right click on the estimate and choose **Accept estimate**.

The items on the estimate are listed. Any items which conflict with the current state of your project are indicated, and will not be applied to your project.

When you click **OK**, a variation is created (or if a variation exists in the **Entering** state then you will be asked to confirm that the estimate will be applied in the current variation.

Doors that were added as part of your estimate will be created, and if they have been created in your project subsequent to the creation of the estimate then the door already created will be used.

Inventory changes are applied only when the state of that item on the door is exactly as it was when the estimate was created. If the door item has been changed subsequent to the estimate then you must make any changes required yourself.

It is recommended that you print the report from the **Accept Estimate** window before you accept the estimate if there are any conflicts so that you know which items to look at.

After accepting the estimate you may accept other estimates into the same variation and then proceed to quote the variation in the normal manner.

9.11.8 Returning an estimate for data entry

Once an estimate is released, it may not be altered.

If the situation arises where you have released an estimate and you need to amend it, then you must return it to data entry.

> If an estimate has been released and printed, you should exercise great caution in running this process.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Estimates**
- Search for estimates in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Right click on the estimate and choose **Return estimate to data entry**.

Notes

An estimate may be returned to data entry only if it has not been accepted.

9.11.9 Printing an estimate

Prior to a estimate being released, it is in entering status. While a estimate is entering, you may print the paperwork, but it is flagged as PROOF.

The pre-release printouts are for checking, and you should not use them for distribution.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Estimates**
- Search for estimates in the same manner that other ProMaster Hardware searches are performed.
- Right click on the estimate and choose **Print**.

The reports

Report	**Description**
Estimate cover sheet	This prints the main estimate document. **Notes:** The contents and layout of this report are controlled by the text and merge fields that you enter when creating the estimate.

Legend	Prints the legend report (see Report: Legend [215] for a description). Click the **Legend options** to access options for the content of the report.
Product schedule	Shows each product in the estimate, with product details. **Options:** Show prices - shows product, dryfit, install, finishing and total price. Show pictures. Show totals - shows totals at the end of the report.
Compact product schedule	Shows each product in the estimate, with product quantity. **Options:** Show prices - shows product price and total product price for each item. Show totals - shows totals at the end of the report. **Notes:** Dryfit, installation and finishing are not shown so this report may be unsuitable for projects that include them.
Product summary	Shows each product in the estimate, with product details. The product quantity is shown. Prices are not included in this report.
Area / door type price summary	Prints a report with two sets of data. The first is a summary by door area and by door type, showing total prices for each combination of area and door type. The second part of the report is a summary by door type only, showing total prices for each door type. **Options:** Layout - controls which prices are included in the report. **Notes:** The data in this report is available as merge fields that can be included in the estimate and hence in the report "Estimate cover sheet".
Doors with prices	Shows a price for each door on the estimate. This report shows only the incremental price for each door, not the total price to date. **Options:** Show totals - shows totals at the end of the report. Show only a total price on each door - Allows suppression of price components (product, dryfit, install, finishing) leaving just a total price for each door. Start each area on a new page - Removes the area column and places an area heading at the top of each change or area. Each area is started on a new page.
Door estimate changes and prices	Shows each door on the estimate, and for each estimate the changed items on that door. Prices changes are shown for each door. **Options:** Show individual item prices - Shows price for each item on each door. Show rating - Show a column for the door rating. Show handing - Show a column for the door handing. Show door type - Show a column for the door type. Start each area on a new page - Removes the area column and places an area heading at the top of each change or area. Each area is started on a new page. Use compact layout - prints the report in portrait format instead of landscape, possibly resulting in fewer pages. **Notes:** Available only for variations, not the main contract.

	Changes for each part (product, dryfit, install, finishing) of each item on each door are shown as a "+" or "-" quantity to show the change that is included in the estimate.
Products by supplier for costing	Shows the items and quantity that are required from each supplier. **Options:** Start each supplier on a new page - Causes a page break between suppliers. Also included additional information about each supplier. **Notes:** Since this report includes cost prices, as a safety measure you are unable to email this report at the same time that you generate any other reports.
Product installation costs for consting	Shows the costs (from your installer) for the installation of each item on the estimate. **Notes:** Since this report includes cost prices, as a safety measure you are unable to email this report at the same time that you generate any other reports.

Inventory display options

These options control the way inventory is presented.

Option	Description
Use short code for inventory part code	Available if your project uses short part codes. If checked, the short code to be used in place of the inventory part code.
Show inventory part code	Available if you have selected to use short codes on the report. If checked, the description to be prefixed with the part code.
Show inventory brand	If checked, the inventory brand is shown on the report.
Show inventory finish	If checked, the inventory finish is shown on the report.

Options

Click the **More options** link for additional options.

Here is an explanation of the option choices:

Option	Description
Show door separator line	Uses a line to separate doors. This layout option should remain on to increase readability unless you have a specific need to remove the lines.
Show inventory separator line	Uses a line to separate inventory items. This layout option should remain on to increase readability unless you have a specific need to remove the lines.
Merge all reports into a single PDF file when emailing	Merges all reports into a single PDF when emailing, and is therefore attached as a single attachment. The PDF may contain a mix of portrait and landscape reports.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports 276 for more information.
Email	The report is sent via email as a PDF attachment.

9.11.10 Copying estimate data to the clipboard

If you want to use the estimate data in another program, you can use this procedure to get summary of the estimate data.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Estimates**
- Search for estimates in the same manner that other ProMaster Hardware searches are performed.
- Select the estimate you want.

Exporting data

- Click on the **More tasks** link then choose **Copy to clipboard**.

9.11.11 Exporting products and prices to a csv file

This export produces data files that extract the prices on an estimate so that this data may be manipulated externally.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Estimates**
- Search for estimates in the same manner that other ProMaster Hardware searches are performed.
- Select the estimate you want.

Exporting data

- Click on the **More tasks** link then choose **Export products and costs (CSV)**.

A simple wizard steps you through the process of choosing where the data will be written, choosing which data to export and choosing export options.

Destination

Choose the destination for the data files.

Data selection

Multiple types of data may be exported at the same time. Each type of data is written to a separate file, named according to the type of data.

9.11.12 Exporting a door product matrix to a csv file

This export produces a matrix of doors versus products on an estimate so that this data may be manipulated.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Estimates**
- Search for estimates in the same manner that other ProMaster Hardware searches are performed.
- Select the estimate you want.

Exporting data

- Click on the **More tasks** link then choose **Export door product matrix (CSV)**.

A simple wizard steps you through the process of choosing where the data will be written, choosing which data to export and choosing export options.

Destination

Choose the destination for the data files.

Data selection

Multiple types of data may be exported at the same time. Each type of data is written to a separate file, named according to the type of data.

9.12 Working with requests for information

Information requests about the project may be recorded and the answers recorded as notes. Communications and documents may reference a request for information in the same manner as other types of activity.

9.12.1 Searching for requests for information

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Request for information**
- Search for information requests in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter information requests. See Entering a request for information 192.

Other functionality

By right clicking on an information request in the list, you may:

Menu option	Description

Documents	Displays documents associated with the information request and allows you to add new documents that will be associated with the information request. See Working with documents 196 .
Communication	Displays communications associated with the information request and allows you to add new communications that will be associated with the information request. See Working with communications 195 .
Release request for information	Releases the information request so it is locked, ready for printing. See Releasing a request for information 192 . Notes may be edited after it is released allowing you to record answers if needed.
Complete request for information	Completes the information request, locking any further changes and indicating that answers are received. See Competing a request for information 193 .
Return request for information to data entry	Allows the information request to be edited. See Returning a request for information for data entry 193 .
Print request for information	Prints or emails the information request paperwork. See Printing a request for information 194 .

9.12.2 Entering a request for information

See the topic Searching for requests for information 191 to learn how to add information requests.

Explanation of data fields

Data field	Description
Request no	The number that uniquely identifies this request for information within the project. Request numbers are generated automatically from the project number but you may change it to anything you like.
Associate	The associate to whom the request is directed.
Date requested	The date of the request.
Consultant	If the request pertains to a particular consultant you may record the consultant. This is optional.
Description	You may record a brief description of the information request to make it easier to determine the purpose of each information request when searching for information requests.
Request text	This is the body of the information request document. Right click on the document for more choices. **Options:** Replace text with template - Choose a new template to replace the information request text. To create templates, see Templates 60 . Insert paragraph - Insert a predefined paragraph at the cursor position. To create paragraphs, see Templates 60 .
Notes	General notes about the information request. This text is for your internal use and is not printed. It may be altered after the request is released but is locked once the information request is marked as complete.

9.12.3 Releasing a request for information

Prior to an information request being released, it is in entering status. While an information request is entering, you may print the paperwork, but it is flagged as PROOF.

The process of releasing an information request flags it as released.

A released information request may not be altered unless you return it for data entry. See Returning a request for information for data entry 193 .

From a released information request you print the official paperwork. See Printing a request for information 194 .

An information request must be released before is may be competed. See Competing a request for information 193 .

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Request for information**
- Search for information requests in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Right click on the information request and choose **Release request for information**.

9.12.4 Competing a request for information

After an information request is entered, released and printed, there comes a time when you have received all the answers and want to mark the information request as complete.

The process of completing an information request flags it as completed.

An information request must be released before is may be completed.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Request for information**
- Search for information requests in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Right click on the information request and choose **Complete request for information**.

9.12.5 Returning a request for information for data entry

Once an information request is released or completed, it may not be altered other than making notes in the released state.

If the situation arises where you have released an information request and you need to amend it, then you must return it to data entry.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Request for information**

- Search for information requests in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Right click on the information request and choose **Return request for information to data entry**.

9.12.6 Printing a request for information

Prior to an information request being released, it is in entering status. While an information request is entering, you may print the paperwork, but it is flagged as PROOF.

If you print reports while the information request is in the entering state, these pre-release printouts are for checking, and you should not use them for distribution.

Release the information request before printing the paperwork for your associate.

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Request for information**
- Search for information requests in the same manner that other ProMaster Hardware searches are performed.
- Right click on the information request and choose **Print**.

The reports

Report	Description
Information request	This prints the information request document.

Options

Click the **More options** link for additional options.

Here is an explanation of the option choices:

Option	Description
Merge all reports into a single PDF file when emailing	Merges all reports into a single PDF when emailing, and is therefore attached as a single attachment. The PDF may contain a mix of portrait and landscape reports.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.

Preview	The report is previewed on your screen. See Previewing reports 276 for more information.
Email	The report is sent via email as a PDF attachment.

9.13 Working with communications

As a project progresses, there will be numerous times when you communicate with associates and other parties and wish to keep track of discussions.

ProMaster Hardware provides this facility in its communications.

In addition to recording your communications, you can link the communication to other data within your project. For example, if you have a discussion involving a particular door, you can link the communication to that door for easy reference at a later time.

Accessing Communications

In various places throughout ProMaster Hardware, there is a **Communications** menu item available on the **More tasks** link, or by right clicking on the list in search windows. In search windows for data that can be linked to a communication, images in the list indicate if communications exist.

Accessing communications this way takes you to the project communications and automatically searches for communications related to the item you are viewing. For example, if you are editing a quote and click the **More tasks** link then choose **Communications**, then ProMaster Hardware will display communications that are linked to this quote.

9.13.1 Recording communications

Getting started

- You must be logged in with a project open.
- From the **Activity** menu, select **Communications**
- Search for communications in the same manner that other ProMaster Hardware searches are performed.

Images in the list indicate if the communication has documents linked to it..

> If you access the project communications from any part of the project other than the main menu (e.g. Variation, Quote, Shipment, Claim, Estimate, Install or Door) then only communications linked to that data are shown, and any new communications you create are automatically linked to that data.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter communications.

Communication properties

- You must provide a **description** and **method** and at least one other party (either an associate from the project or other people entered manually)
- The communication tab is where you can record any information about the communication.
- Notes is intended for additional information that did not form part of the communication.

Right click on the communication for more choices.

- Replace text with template - Choose a new template to replace the communication text. To create templates, see Templates 60 .

- Insert paragraph - Insert a predefined paragraph at the cursor position. To create paragraphs, see Templates 60.

Project links

Project links is where you join the communication to various parts of the project. By doing this you can find the communication directly from that other data (e.g. quote, variation, claim)

You may link to as many parts of the project as you like.

- To create a link, choose what type of link you want (variation, quote, shipment, install, claim, estimate or door), then pick, from the corresponding list the data item, then click **Add link** to create the linkage.
- To remove a link, right click the list on the item you want to remove then choose the menu option the remove the link.

9.14 Working with documents

Any amount of documentation may be stored within a project. Documentation may be notes only, or images, or any number of supported document types (e.g. zip, rar, pdf, xps, msg, rtf, txt, doc, docm, docx, xls, xlsm, xlsx, ppt, pptm, pps, ppsm, pptx, ppsx).

Documents may be related to the project only, or may be tied to a particular Variation, Quote, Estimate, Shipment, Claim, Install, Door or Communication.

> Once a document has been added to the project it is immutable.

9.14.1 Storing documents

Getting started

- You must be logged in with a project open.
- From the **Project** menu, select **Documents**
- Search for documents in the same manner that other ProMaster Hardware searches are performed.

Images in the list show the type of document (document, image or notes only) and also indicate if it is linked to other parts of the project.

> If you access the project documents from any part of the project other than the main menu (e.g. Variation, Quote, Shipment, Claim, Estimate, Install, Door or Communication) then only documents linked to that data are shown, and any new documents you create are automatically linked to that data.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter documents.

When you add a document, you will be asked if you want to add a document, image (load from disk, capture from scanner or paste from clipboard) or notes only.

If you are storing an image (from a file, your scanner of the clipboard), you will be presented with the image in the image editor (see Image editor 274) where you can perform edits to the image to optimise it for readability and size.

You may drag a file from Windows Explorer or Microsoft Outlook and drop it onto the target instead of choosing a source and clicking OK to select the file. The file you drop must be one of the accepted document or image types and it must be a single file.

You may drag the whole message (.msg file) from Outlook into the document store. Outlook Express EML files are not supported.

Document properties

- You must provide a **Type** for your document before you store it. The **Type** is used for easy identification of the document at a later time.
- The document description is optional but should be used where it may be helpful when later retrieving the document.
- A tab shows your document, and another tab is provided where you may record notes about the document.

The document properties may be edited at a later time, but once saved, the actual document (image, PDF, DOC etc) is immutable.

You may print the graphic by clicking on the Print button.

If a multi-page TIF file is loaded, buttons are available from navigating between the pages.

When a TIF file is loaded, it is checked and if the horizontal and vertical resolutions differ then the image is re-sampled so that is appears correctly. This is essential for TIF files created by Microsoft Fax, as these do not appear correctly in most applications outside of Microsoft Fax itself.

Other functionality

By right clicking on a document in the list, you may:

Menu option	Description
Move up	Changes the order that documents will appear in the project. Available only when all items are being displayed.
Move down	Changes the order that documents will appear in the project. Available only when all items are being displayed.
Sort by date/time	Sorts the documents according to the date. Available only when all items are being displayed.

9.15 Working with keys

If you want to record key information ready for Exporting to ProMaster Master-Keying 230 then this section is applicable to you

9.15.1 Entering keys

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Keys**
- Search for Keys in the same manner that other ProMaster Hardware searches are performed.

Making a change

- Use the **Add**, **Remove** and **Properties** buttons to enter and alter keys.

When you add a key, it is added immediately after the highlighted key. See Setting your preferences 84 for settings that control how information is copied from one key to another when adding keys.

Explanation of data fields

Data field	Description

Key number	The number that uniquely identifies this key within the project. Each key has a unique key number.
Description	A description of the key to give it meaning beyond that attributed to the key number.
Category	Category allows you to perform basic grouping on keys. This information has no meaning beyond grouping keys together into a logical group and for searching purposes.
Key above	The key above specifies the key above this key in hierarchy. The top level key in a system will have no keys above. See the notes below on understanding key designations and hierarchy.
Designation	The key designation specifies the keys purpose. See the notes below on understanding key designations and hierarchy.

Understanding key designations and hierarchy

Key above

In a project, the top level key will not have a key above. All other keys should be assigned a key above that complies with the following rules.

- Any key that is a key above for another key must be designation Master.
- If key A is above key B, then key A must operate all doors operated by key B. Or put another way, key B must not operate any doors that are not operate by key A.
- If a key is not the key above another key, then it's designation must not be Master.

Designation

Designation	Description
Master	A Master key fits into a pure hierarchical layout and is the Key above for one or more other keys.
Change	A Change key is a bottom level key that fits into a pure hierarchical layout. A Change key must not be the Key above for another key.
Selective	A Selective key does not fit into a pure hierarchical layout. A Selective key must not be the Key Above for another key.

Other functionality

Click the **More tasks** link to:

Menu option	Description
Keying matrix	Opens the keying matrix. See Keying matrix 200.
Bulk change	Make changes to multiple keys at the same time. See Bulk change keys 198.
Key sorter	Opens a sorting window to allow more advanced sorting of the keys. See Sorting keys 199.
Import from CSV file	Import keys from a csv file. See Importing keys from a csv file 201.
Import keying from CSV file	Import keying from a csv file. See Importing keying from a csv file 202.

9.15.2 Bulk change keys

Bulk changing is the process whereby you may apply the same change to a few or even many keys in a single operation. It is useful for changing a number of keys when you have entered them without this information or to rapidly fix data errors.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Keys**
- Search for the keys you want to include in the bulk change operation
- Click on the **More tasks** link then choose the option **Bulk change**

Making a change

The process of making a bulk change is very simple, just follow these steps.

- In the **Data type to change** drop down menu, choose what you want to change
- The options for what you may change depend on the selection made. Enter the information for your change (e.g. new value, selection, etc)
- Ensure that the correct keys are selected, selecting or deselecting them as necessary.
- Click the **Apply change** button.

Repeat these 4 steps as many times as you want.

Finally, to save your changes click the **OK** button.

Notes

- Within this window, the selected change is applied only to items that are checked (in the far left column of each item)
- You can check and uncheck items individually, or use the **Select all** and **Deselect all** buttons. Right click on the list for more selection options.
- You can make as many different types of changes as you like within this window.

Changes are stored in memory, and are not saved until you click the **OK** button.

9.15.3 Sorting keys

Key sorting is about getting the keys in your project to appear in the order that you want them.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Keys**
- Click on the **More tasks** link then choose the option **Key sorter**

Making a change

The process of sorting keys involves selecting the keys to sort then applying a sorting operation to those selected items. The process may be repeated as many times as necessary.

Selection and sorting operations are accessible through the button bar at the top of the window, through a popup context menu (right click mouse) and through various hot-key combinations.

Selecting keys for sorting

There are various ways to select items. The help refers to key presses wherever possible, although you may choose to use the buttons or popup menu.

Task	**Procedure**
Select all items	Press **Ctrl+A**

De-select all items	Press **Ctrl+N**
Select to the end	Click on a key to highlight it. Right click your mouse and choose **Select to bottom**.
Select a range of items	Click on the first key then drag to the last key. or Click on the first key, hold down the Shift key, click on the last key.
Select scattered items	Click on the first key. While holding down the Ctrl key, click on the other keys.

Sorting keys

The sorting operations are applied to the selected keys.

The sorting operations available are:

Sort operation	Procedure
Move up	Press **Ctrl+Up** Moves all the selected keys up one position.
Move down	Press **Ctrl+Down** Moves all the selected keys down one position.
Move up half page	Press **Ctrl+PgUp** Moves all the selected keys up half the height of the window.
Move down half page	Press **Ctrl+PgDn** Moves all the selected keys down half the height of the window.
Bring together	Press **Ctrl+B** Brings all the selected keys together, positioning them under the topmost selected item.
Alpha sort	Press **Ctrl+S** Sorts the selected keys by treating the key number as pure text. I.e. A dictionary sort is performed.
Numeric sort	Press **Ctrl+M** Sorts the selected keys in logical numerical order. All selected keys must have a numerical component in the key number. Each key number is broken into multiple numerical components and these are compared for sorting purposes. A numeric sort will correctly produce the sequence 1.1, 1.2, ..., 1.9. 1.10, 1.11, 2.1, 2.2, ..., 2.9, 2.10
USA sort	Press **Ctrl+U** Sorts the selected keys by treating the key number according to USA key numbering conventions.

Select groups of keys and then sort them as you want.

Finally, to save your changes click the **OK** button.

9.15.4 Keying matrix

The keying matrix shows you all keys and doors in a project, indicating which keys fit each door. Use the keying matrix to define which keys fit each door.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Keying**

Using the keying matrix

Click the options button to change:

- The orientation of keys and doors
- What is shown for keys
- What is shown for doors
- What is highlighted (e.g. Highlight unassigned keys and doors)
- Find door and Find key may be used to locate doors and keys.

Right click on the keying matrix for more functions and to see keyboard shortcuts.

Making a change

Click on the intersection of a key and door to turn on or off check mark at that position. Alternatively you may navigate the matrix with your keyboard and use the space key to make the change.

Changes are stored in memory and are saved only when you clock **OK** to finish.

> If you access the keying matrix from the doors window or the keys window, the doors or keys are restricted to the search performed before opening the keying matrix.

9.15.5 Importing keys from a csv file

If you have key data in a CSV file, it is possible to import this data.

This topic describes the process of importing a CSV key file.

Read the topic Key import (CSV) file format 260 for more information on the file contents allowed.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Keys**
- Click on the **More tasks** link then choose the option **Import from csv file.**

Importing data

A simple wizard steps you through the import process.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

The Operation determines how the import is processed. Choose if you want new items, if you are updating existing items, or both.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

9.15.6 Importing keying from a csv file

If you have keying data in a CSV file, it is possible to import this data.

This topic describes the process of importing a CSV keying file.

Read the topic Keying import (CSV) file format 260 for more information on the file contents allowed.

Getting started

- You must be logged in with a project open.
- From the **Doors** menu, select **Keys**
- Click on the **More tasks** link then choose the option **Import keying from csv file.**

Importing data

A simple wizard steps you through the import process.

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents and operation

The wizard shows you the first three lines of the file so that you can see how it has been parsed. From this you may determine if the file content is what you were expecting or not.

It is common for the first line of a CSV file to contain column headings. The wizard tries to determine if that is the case with the file you selected, and sets the options accordingly. If the option for the first line is not correct, be sure to check or un-check it as necessary.

- Click **Next**

Choose data columns

The wizard looks at the column headings (if they are included in the file) and from these it attempts to determine what each column in the file is used for.

You may change the source column for each type of data. In each drop-down list, the column number, heading and first piece of data is shown.

Before proceeding you must correct any errors in the automatic column selection and also for any unassigned column make a selection for the source.

For all data types not contained in the import file the selection **Not available** must be made.

- Click **Next**

Data analysis

A comprehensive data analysis is performed and any problems are reported.

If the analysis indicates that there are errors contained in the file, then you have the option to see the detail of those errors.

If there are errors, you must either fix the file and restart the import, of if you are happy to ignore the erroneous rows then then you can check the option to skip those rows.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

9.16 Reporting

9.16.1 Printer options

Every report allows you to access printer options by clicking on the **Printer options** link.

Printer options allow you to:

- Choose a different printer and paper tray for the report to be sent to.
- Print on both sides of the paper (if your printer supports duplexing)
- Print multiple copies
- Access the printer's advanced settings.

If you select the option to **Show advanced printer settings before you print**, the printer settings for your printer are displayed before the report is sent to the printer. This allows you to access printer specific features such as printing multiple pages onto a single sheet of paper, selecting a different output bin or requesting the report be stapled.

9.16.2 Project reports

9.16.2.1 Report: Doors

A variety of reports are produced, depending on the report layout you choose.

You may choose from: Doors, Doors with hardware, Doors with keys, Keying matrix, Doors supplied / installed.

Getting started

- You must be logged in with a project open.
- From the **Reports** menu, select **Doors**

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Which doors do you want to include

Range	Description
Choose doors by	**All doors**: All doors are printed. **A selection of doors:** The selected doors are included in the report. Click the **Select doors** link to build up your selection of doors. **Doors in an area:** Doors in a single area are included in the report. Choose an area from the list. **Doors in a stage:** Doors in a single stage are included in the report. Choose a stage from the list. **Doors with activity in a variation:** Doors that have activity in a variation are included in the report. Activity means that inventory has been added, removed or altered in that variation. Choose a variation from the list. **Doors with activity in a quote:** Doors that appear on a quote are included in the report. Choose a quote from the list.
Door types	Select one or more door types to restrict the range of doors printed. Not available when choosing a selection of doors.
Frame types	Select one or more frame types to restrict the range of doors printed. Not available when choosing a selection of doors.

Options

Options modify the way the report appears, or the data included in the report.

The options that are are available vary according to your selection of range and report layout.

Here is an explanation of the option choices:

Option	Description	Applies to
Report layout	The report layout determines the type of report that will be printed and also what other options are available. **Doors "A":** A list of doors.	

	Doors with hardware "B": A list of doors showing the hardware on each door. **Doors with keys "C":** A list of doors showing the keys that operate each door. **Keying matrix "D":** Doors and keys in a matrix layout. **Keying matrix - large format "E":** Doors and keys in a matrix layout, A3 size paper. **Doors supplied / installed "F":** A list of doors showing the hardware on each door. The quantity of product, dryfit, install and finishing is shown, as is the quantity of each that is supplier or installed. An additional indicator shows inventory items that are complete. **Pre-installation site survey "G":** A list of doors showing the hardware on each door, with a place to record inspection for each item and a place to write notes.	
Show door notes	Choose if door notes are shown for each door.	A,B,C,F,G
Show rating	Choose if rating is shown for each door.	A,B,G
Show handing	Choose if handing is shown for each door.	A,B,G
Show door type	Choose if door type is shown for each door.	A,B,G
Show frame type	Choose if frame type is shown for each door.	A,B,G
Show only inventory items changed	When choosing doors by variation or quote, this option allows you to restrict the inventory items to just those that have been altered in the variation or quote.	B,G
Hide items that have been removed	When items are removed in a variation, they will continue to show on the door with zero quantity. This option allows them to be excluded from the report.	B,F,G
Start each area on a new page	Removes the door area column (giving more space for other fields) and creates a header at the start of each area. Doors are resorted if necessary to ensure that doors in an area are consecutive. Each area is started on a new page.	A,B,C,F,G
Use compact layout	When available, the report is available in both landscape and portrait. The compact option selects the portrait report.	A,B,G
Show door separator line	Uses a line to separate doors. This layout option should remain on to increase readability unless you have a specific need to remove the lines.	A,B,C,F,G
Show inventory separator line	Uses a line to separate inventory items. This layout option should remain on to increase readability unless you have a specific need to remove the lines.	B,F,G
Show key separator line	Uses a line to separate keys. This layout option should remain on to increase readability unless you have a specific need to remove the lines.	C
Show keys that are not used by any doors	Specifies that the matrix should include keys that are not used by any of the doors, otherwise only keys that operate the selected doors will be shown.	D,E
Show door description	Specifies that the matrix should include the door description.	D,E

Show door area	Specifies that the matrix should include the door area.	D,E

Inventory display options

These options control the way inventory is presented.

Option	Description
Use short code for inventory part code	Available if your project uses short part codes. If checked, the short code to be used in place of the inventory part code.
Show inventory part code	Available if you have selected to use short codes on the report. If checked, the description to be prefixed with the part code.
Show inventory brand	If checked, the inventory brand is shown on the report.
Show inventory finish	If checked, the inventory finish is shown on the report.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup [85]), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports [276] for more information.
Email	The report is sent via email as a PDF attachment.

9.16.2.2 Report: Door inventory summary

The door inventory summary report shows total product quantities for each inventory item in the project based on the quantities in accepted quotes. You may choose to show prices also.

Getting started

- You must be logged in with a project open.
- From the **Reports** menu, select **Door inventory summary**

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Which doors do you want to include

Range	Description
Choose doors by	**All doors**: All doors are printed. **A selection of doors:** The selected doors are included in the report. Click the **Select**

	doors link to build up your selection of doors. **Doors in an area:** Doors in a single area are included in the report. Choose an area from the list. **Doors in a stage:** Doors in a single stage are included in the report. Choose a stage from the list.
Door types	Select one or more door types to restrict the range of doors printed. Not available when choosing a selection of doors.
Frame types	Select one or more frame types to restrict the range of doors printed. Not available when choosing a selection of doors.

Options

Options modify the way the report appears, or the data included in the report.

Here is an explanation of the option choices:

Option	**Description**
Show totals	Turns on totals at the end of the report.
Show inventory separator line	Uses a line to separate inventory items. This layout option should remain on to increase readability unless you have a specific need to remove the lines.
Show prices from accepted quotes	Specifies that the report show quotation prices (product, dryfit, install and finishing).

Inventory display options

These options control the way inventory is presented.

Option	**Description**
Use short code for inventory part code	Available if your project uses short part codes. If checked, the short code to be used in place of the inventory part code.
Show inventory part code	Available if you have selected to use short codes on the report. If checked, the description to be prefixed with the part code.
Show inventory brand	If checked, the inventory brand is shown on the report.
Show inventory finish	If checked, the inventory finish is shown on the report.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	**Description**
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports 276 for

	more information.
Email	The report is sent via email as a PDF attachment.

9.16.2.3 Report: Doors using an inventory item

The doors using an inventory item report shows doors in the project that use a selected inventory item.

Getting started

- You must be logged in with a project open.
- From the **Reports** menu, select **Doors using inventory item**

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Select the inventory item to query

Choose the item to report on from the list.

Which doors do you want to include

Range	**Description**
Choose doors by	**All doors**: All doors are printed. **A selection of doors:** The selected doors are included in the report. Click the **Select doors** link to build up your selection of doors. **Doors in an area:** Doors in a single area are included in the report. Choose an area from the list. **Doors in a stage:** Doors in a single stage are included in the report. Choose a stage from the list. **Doors with activity in a variation:** Doors that have activity in a variation are included in the report. Activity means that inventory has been added, removed or altered in that variation. Choose a variation from the list. **Doors with activity in a quote:** Doors that appear on a quote are included in the report. Choose a quote from the list.
Door types	Select one or more door types to restrict the range of doors printed. Not available when choosing a selection of doors.
Frame types	Select one or more frame types to restrict the range of doors printed. Not available when choosing a selection of doors.

Options

Options modify the way the report appears, or the data included in the report.

Here is an explanation of the option choices:

Option	**Description**
Show totals	Turns on totals at the end of the report.
Show door type	Choose if door type is shown for each door.

Show frame type	Choose if frame type is shown for each door.
Start each area on a new page	Removes the door area column (giving more space for other fields) and creates a header at the start of each area. Doors are resorted if necessary to ensure that doors in an area are consecutive. Each area is started on a new page.
Show door separator line	Uses a line to separate doors. This layout option should remain on to increase readability unless you have a specific need to remove the lines.

Inventory display options

These options control the way inventory is presented.

Option	**Description**
Use short code for inventory part code	Available if your project uses short part codes. If checked, the short code to be used in place of the inventory part code.
Show inventory part code	Available if you have selected to use short codes on the report. If checked, the description to be prefixed with the part code.
Show inventory brand	If checked, the inventory brand is shown on the report.
Show inventory finish	If checked, the inventory finish is shown on the report.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	**Description**
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports 276 for more information.
Email	The report is sent via email as a PDF attachment.

9.16.2.4 Report: Door prices

The door prices report shows the price for each door based on the quantities in accepted quotes. You may choose to show the price breakdown (product, dryfit, install, finishing) also.

Getting started

- You must be logged in with a project open.
- From the **Reports** menu, select **Door prices**

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Which doors do you want to include

Range	Description
Choose doors by	**All doors**: All doors are printed. **A selection of doors:** The selected doors are included in the report. Click the **Select doors** link to build up your selection of doors. **Doors in an area:** Doors in a single area are included in the report. Choose an area from the list. **Doors in a stage:** Doors in a single stage are included in the report. Choose a stage from the list. **Doors with activity in a variation:** Doors that have activity in a variation are included in the report. Activity means that inventory has been added, removed or altered in that variation. Choose a variation from the list. **Doors with activity in a quote:** Doors that appear on a quote are included in the report. Choose a quote from the list.
Door types	Select one or more door types to restrict the range of doors printed. Not available when choosing a selection of doors.
Frame types	Select one or more frame types to restrict the range of doors printed. Not available when choosing a selection of doors.

Options

Options modify the way the report appears, or the data included in the report.

Here is an explanation of the option choices:

Option	Description
Show totals	Turns on totals at the end of the report.
Show only a total price on each door	Choose if only a total price for each door is shown, suppressing the price breakdown (product, dryfit, install, finishing).
Start each area on a new page	Removes the door area column (giving more space for other fields) and creates a header at the start of each area. Doors are resorted if necessary to ensure that doors in an area are consecutive. Each area is started on a new page.
Show door separator line	Uses a line to separate doors. This layout option should remain on to increase readability unless you have a specific need to remove the lines.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports[276] for more information.
Email	The report is sent via email as a PDF attachment.

9.16.2.5 Report: Door rating discrepancies

The door rating discrepancies report shows inventory combinations where the inventory item is not suitable for the door rating. For any door where a specific rating is not specified, the overall project rating is used for that door. For this report to function, all inventory items must have the rating set (see Ratings)[70] .

Getting started

- You must be logged in with a project open.
- From the **Reports** menu, select **Door rating discrepancies**

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Which doors do you want to include

Range	Description
Choose doors by	**All doors**: All doors are printed. **A selection of doors:** The selected doors are included in the report. Click the **Select doors** link to build up your selection of doors. **Doors in an area:** Doors in a single area are included in the report. Choose an area from the list. **Doors in a stage:** Doors in a single stage are included in the report. Choose a stage from the list. **Doors with activity in a variation:** Doors that have activity in a variation are included in the report. Activity means that inventory has been added, removed or altered in that variation. Choose a variation from the list. **Doors with activity in a quote:** Doors that appear on a quote are included in the report. Choose a quote from the list.
Door types	Select one or more door types to restrict the range of doors printed. Not available when choosing a selection of doors.
Frame types	Select one or more frame types to restrict the range of doors printed. Not available when choosing a selection of doors.

Options

Options modify the way the report appears, or the data included in the report.

Here is an explanation of the option choices:

Option	Description

Show item separator line	Uses a line to separate items.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	**Description**
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports 276 for more information.
Email	The report is sent via email as a PDF attachment.

9.16.2.6 Report: Variation changes

The variation changes report shows each change made within a variation to each item on each door. The report shows you the changes in the variation for each inventory item, not the final result on each inventory item attributed to the variation.

This report is possible only after you have made a variation.

Getting started

- You must be logged in with a project open.
- From the **Reports** menu, select **Variation changes**

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Select the variation to show

Choose the variation to report on from the list.

Options

Options modify the way the report appears, or the data included in the report.

Here is an explanation of the option choices:

Option	**Description**
Show rating	Choose if rating is shown for each door.
Show handing	Choose if handing is shown for each door.
Show door type	Choose if door type is shown for each door.
Show frame type	Choose if frame type is shown for each door.
Start each area on a new page	Removes the door area column (giving more space for other fields) and

	creates a header at the start of each area. Doors are resorted if necessary to ensure that doors in an area are consecutive. Each area is started on a new page.
Show inventory separator line	Uses a line to separate inventory items. This layout option should remain on to increase readability unless you have a specific need to remove the lines.

Inventory display options

These options control the way inventory is presented.

Option	Description
Use short code for inventory part code	Available if your project uses short part codes. If checked, the short code to be used in place of the inventory part code.
Show inventory part code	Available if you have selected to use short codes on the report. If checked, the description to be prefixed with the part code.
Show inventory brand	If checked, the inventory brand is shown on the report.
Show inventory finish	If checked, the inventory finish is shown on the report.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports 276 for more information.
Email	The report is sent via email as a PDF attachment.

9.16.2.7 Report: Project status

The project status report shows a summary of all quotes, shipments, installations and claims in the project.

Getting started

- You must be logged in with a project open.
- From the **Reports** menu, select **Project status**

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup[85]), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports[276] for more information.
Email	The report is sent via email as a PDF attachment.

9.16.2.8 Report: Quote summary

The quote summary report shows all accepted quotes on the project. Price and cost is shown as is the margin.

The quote components (product, dryfit, install and finishing) are shown.

Getting started

- You must be logged in with a project open.
- From the **Reports** menu, select **Quote summary**

Options

Options modify the way the report appears, or the data included in the report.

Here is an explanation of the option choices:

Option	Description
Show costs	Shows costs and margins on the report. Without costs and margins the report is a summary suitable for the customer.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup[85]), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports[276] for more information.
Email	The report is sent via email as a PDF attachment.

9.16.2.9 Report: Estimate summary

The estimate summary report shows all accepted estimates on the project. Price and cost is shown as is the margin.

The estimate components (product, dryfit, install and finishing) are shown.

Getting started

- You must be logged in with a project open.
- From the **Reports** menu, select **Estimate summary**

Options

Options modify the way the report appears, or the data included in the report.

Here is an explanation of the option choices:

Option	Description
Show costs	Shows costs and margins on the report. Without costs and margins the report is a summary suitable for the customer.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports 276 for more information.
Email	The report is sent via email as a PDF attachment.

9.16.2.10 Report: Legend

The legend report shows a variety of project information and is highly configurable for what information is shown. Predominantly it is used to show the inventory items listed according to the short code heading and short codes, and to convey the relationship between short codes and descriptions for categorisation information such ad door types, frame types, etc.

Getting started

- You must be logged in with a project open.
- From the **Reports** menu, select **Legend**

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

What items do you want on the legend

Item	Description
Include inventory options	Choose to show a table of inventory items. There are various to allow control over the information shown.
Include inventory types	Choose to show a table of short codes and descriptions for inventory types.
Include inventory finishes	Choose to show a table of short codes and descriptions for inventory finishes.
Include door handings	Choose to show a table of short codes and descriptions for handings. There is an option to include notes.
Include door types	Choose to show a table of short codes and descriptions for door types. There is an option to include notes.
Include door finishes	Choose to show a table of short codes and descriptions for door finishes. There is an option to include notes.
Include frame types	Choose to show a table of short codes and descriptions for frame types. There is an option to include notes.
Include frame finishes	Choose to show a table of short codes and descriptions for frame finishes. There is an option to include notes.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports 276 for more information.
Email	The report is sent via email as a PDF attachment.

9.16.2.11 Report: Keys

The keys report shows keys and optionally the corresponding doors for each key.

Getting started

- You must be logged in with a project open.
- From the **Reports** menu, select **Keys**

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Which keys do you want to include

Range	Description

Choose keys by	**All keys**: All keys are printed. **A selection of keys**: The selected keys are included in the report. Click the **Select keys** link to build up your selection of keys. **Keys in a category**: Keys in a single category are included in the report. Choose a category from the list.

Options

Options modify the way the report appears, or the data included in the report.

Here is an explanation of the option choices:

Option	Description
Show key notes	Choose if key notes are shown for each key.
Show door information	Choose if doors operated by each key are shown.
Show key separator line	Uses a line to separate keys. This layout option should remain on to increase readability unless you have a specific need to remove the lines. Applicable if neither key notes nor door information is selected.
Show door separator line	Uses a line to separate doors. This layout option should remain on to increase readability unless you have a specific need to remove the lines.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports 276 for more information.
Email	The report is sent via email as a PDF attachment.

9.16.2.12 Report: Project inventory sets

The project inventory sets report the shows the make-up of your project inventory sets.

Getting started

- You must be logged in with a project open.
- From the **Reports** menu, select **Project inventory sets**

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Which sets do you want to include

Range	Description
Choose sets by	**All sets**: All sets are printed. **A selection of inventory sets**: The selected sets are included in the report. Click the **Select sets** link to build up your selection of sets.

Options

Options modify the way the report appears, or the data included in the report.

Here is an explanation of the option choices:

Option	Description
Show set notes	Choose if set notes are shown for each set.
Show inventory separator line	Uses a line to separate inventory items. This layout option should remain on to increase readability unless you have a specific need to remove the lines.

Inventory display options

These options control the way inventory is presented.

Option	Description
Use short code for inventory part code	Available if your project uses short part codes. If checked, the short code to be used in place of the inventory part code.
Show inventory part code	Available if you have selected to use short codes on the report. If checked, the description to be prefixed with the part code.
Show inventory brand	If checked, the inventory brand is shown on the report.
Show inventory finish	If checked, the inventory finish is shown on the report.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports 276 for more information.
Email	The report is sent via email as a PDF attachment.

9.16.3 Admin reports

9.16.3.1 Report: Projects using an inventory item

The projects using an inventory item report shows projects that use a selected inventory item. The total quantity specified on doors for each project is shown.

Getting started

- You must be logged in with a project open.
- From the **Admin Reports** menu, select **Projects using inventory item**

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Which inventory item do you want to query

Choose the item to report on by clicking the **Select inventory** link.

For what period do you want projects considered

Range	Description
Date range	**All dates**: Project selection is not filtered by date. **Range of project creation dates**: Projects are filtered to include those whose creation date falls within the **From** and **To** dates that you enter. **Range of project required dates**: Projects are filtered to include those whose required date falls within the **From** and **To** dates that you enter.

Options

Options modify the way the report appears, or the data included in the report.

Here is an explanation of the option choices:

Option	Description
Show totals	Turns on totals at the end of the report.
Include archived projects	Includes or excludes archived projects from the selection of items to print.
Show project separator line	Uses a line to separate projects. This layout option should remain on to increase readability unless you have specific needs to remove the lines.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description

Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports 276 for more information.
Email	The report is sent via email as a PDF attachment.

9.16.3.2 Report: Projects by consultant

The project by consultant report shows projects for a consultant that fall within a date range. The number of variations and quotes of each status are shown.

Getting started

- You must be logged in with a project open.
- From the **Admin Reports** menu, select **Projects by consultant**

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Which consultant do you want to report on

Choose the consultant from the list to report on or choose **(All)** to report on all consultants.

For what period do you want projects considered

Range	Description
Date range	**All dates**: Project selection is not filtered by date. **Range of project creation dates**: Projects are filtered to include those whose creation date falls within the **From** and **To** dates that you enter. **Range of project required dates**: Projects are filtered to include those whose required date falls within the **From** and **To** dates that you enter.

Options

Options modify the way the report appears, or the data included in the report.

Here is an explanation of the option choices:

Option	Description
Show totals	Turns on totals at the end of the report.
Start each consultant on a new page	Creates a page break after each consultant so that no two consultants appear on the same page.
Include archived projects	Includes or excludes archived projects from the selection of items to print.
Show each project for only the main consultant	If selected, each project is shown just once, for the main consultant. Otherwise each project is shown for each consultant.
Show project separator line	Uses a line to separate projects. This layout option should remain on to increase readability unless you have specific needs to remove the lines.
Sorting	A choice is given for the order that projects appear.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports 276 for more information.
Email	The report is sent via email as a PDF attachment.

9.16.3.3 Report: Accepted quote totals by consultant

The accepted quote totals by consultant report shows, by consultant, a total value for accepted quotes that fall within the specified date range.

Getting started

- You must be logged in with a project open.
- From the **Admin Reports** menu, select **Accepted quote totals by consultant**

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Which consultant do you want to report on

Choose the consultant from the list to report on or choose **(All)** to report on all consultants.

For what period do you want projects considered

Range	Description
Date range	**All dates**: Quote selection is not filtered by date. **Range of accepted quote dates**: Quotes are filtered to include those whose accepted date falls within the **From** and **To** dates that you enter.

Options

Options modify the way the report appears, or the data included in the report.

Here is an explanation of the option choices:

Option	Description
Show totals	Turns on totals at the end of the report.
Include archived projects	Includes or excludes archived projects from the selection of items to print.

Include each project for only the main consultant	If selected, each project is included just once, for the main consultant. Otherwise each project is included for each consultant.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports 276 for more information.
Email	The report is sent via email as a PDF attachment.

9.16.3.4 Report: Quote value and margin

The quote value and margin report shows quotes within a period and their value, and optionally the corresponding margin for each quote.

Getting started

- You must be logged in with a project open.
- From the **Admin Reports** menu, select **Quote value and margin**

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Which associate do you want to report on

Choose the associate from the list to report on or choose **(All)** to report on all associates.

Which consultant do you want to report on

Choose the consultant from the list to report on or choose **(All)** to report on all consultants.

For what period do you want projects considered

Specify the date **from** and date **to** to use when choosing which quotes to show. The date range is compared to the date quoted.

Options

Options modify the way the report appears, or the data included in the report.

Here is an explanation of the option choices:

Option	Description

Show margin	Includes the margin achieved on the quote.
Show totals	Turns on totals at the end of the report.
Include released quotes	Includes or excludes released quotes from the selection of items to print.
Include accepted quotes	Includes or excludes accepted quotes from the selection of items to print.
Include quotes for variations	Includes quotes for variations as well as those for main contracts.
Include dryfit/install/finishing as well as product	Includes product, dryfit, install and finishing in the report values. If unchecked then the report is for product only.
Include archived projects	Includes or excludes archived projects from the selection of items to print.
Group by associate	Sorts the quotes by associate and the date, and starts each associate with a heading on a new page.
Group by main consultant	Sorts the quotes by consultant and the date, and starts each consultant with a heading on a new page.
Start each group on a new page	When report is grouped by associate or consultant, this option determines if each group begins on a new page or not.
Show quote separator line	Uses a line to separate quotes. This layout option should remain on to increase readability unless you have a specific need to remove lines.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports 276 for more information.
Email	The report is sent via email as a PDF attachment.

9.16.3.5 Report: Projects needing claim

The projects needing claim report shows all projects that have items available to claim. Only the main consultant is considered. The outstanding claim amount may be shown on the report.

Getting started

- You must be logged in with a project open.
- From the **Admin Reports** menu, select **Projects needing claim**

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

Which consultant do you want to report on

Choose the consultant from the list to report on or choose **(All)** to report on all consultants.

Options

Options modify the way the report appears, or the data included in the report.

Here is an explanation of the option choices:

Option	Description
Show claim amount	If selected, the value available to claim on each project is shown.
Show totals	Turns on totals at the end of the report.
Start each consultant on a new page	Creates a page break after each consultant so that no two consultants appear on the same page.
Show project separator line	Uses a line to separate projects. This layout option should remain on to increase readability unless you have specific needs to remove the lines.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports 276 for more information.
Email	The report is sent via email as a PDF attachment.

9.16.3.6 Report: Claims in period

The claims in period report shows claims that have been created within a period.

Getting started

- You must be logged in with a project open.
- From the **Admin Reports** menu, select **Claims in period**

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

For what period do you want claims considered

Specify the date **from** and date **to** to use when choosing which claims to show. The date range is compared to the claim date.

Which associate do you want to report on

Choose the associate from the list to report on or choose **(All)** to report on all associates.

Which consultant do you want to report on

Choose the consultant from the list to report on or choose **(All)** to report on all consultants.

Options

Options modify the way the report appears, or the data included in the report.

Here is an explanation of the option choices:

Option	Description
Show totals	Turns on totals at the end of the report.
Show separator line	Uses a line to separate claims. This layout option should remain on to increase readability unless you have a specific need to remove lines.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports 276 for more information.
Email	The report is sent via email as a PDF attachment.

9.16.3.7 Report: Lost projects

The lost projects report shows projects that have been quoted in a date range and where the quote was not accepted and the project is marked as lost.

Archived projects are included in the selection if they fall within the specified date range.

Getting started

- You must be logged in with a project open.
- From the **Admin Reports** menu, select **Lost projects**

Range

The range specifies the set of data that will included in the report. Here is an explanation of the range choices:

For what period do you want quotes considered

Specify the date **from** and date **to** to use when choosing which projects to show. The date range is compared to the date quoted.

Choose if the report is based off the date quoted ot the date lost.

Which associate do you want to report on

Choose the associate from the list to report on or choose **(All)** to report on all associates.

Which consultant do you want to report on

Choose the consultant from the list to report on or choose **(All)** to report on all consultants.

Options

Options modify the way the report appears, or the data included in the report.

Here is an explanation of the option choices:

Option	**Description**
Show separator line	Uses a line to separate quotes. This layout option should remain on to increase readability unless you have a specific need to remove lines.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup[85]), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	**Description**
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports[276] for more information.
Email	The report is sent via email as a PDF attachment.

9.16.3.8 Report: Document storage sizes

The document storage sizes report shows the size of documents in your database categorised in various ways. Primarily this can be useful for determining if database size may be reduced by deleting snapshots with large documents when the associate project is complete.

Getting started

- You must be logged in with a project open.
- From the **Admin Reports** menu, select **Document storage sizes**

Options

Options modify the way the report appears, or the data included in the report.

Here is an explanation of the option choices:

Option	Description
Do not show sizes by project	Only the summary information is shown
Show sizes by project for 'In progress' projects	In addition to the summary information, the size of documents associated with snapshots for each 'In progress' project is shown as it the number of documents.
Show sizes by project for 'Completed' projects	In addition to the summary information, the size of documents associated with snapshots for each 'Completed' project is shown as it the number of documents.

Producing the report

Printer options

To access additional settings for the way the report is produced, click on the **Printer options** link in the bottom left of the window.

Options are provided to select a different printer (standard printers are defined in Printer setup 85), print on both sides of the paper (if your printer is capable of duplex printing) and to print multiple copies.

An option is provided to show advanced options specific to your printer when the report is run. This gives you access to all your printer's settings such as printing multiple pages per sheet.

Output options

Option	Description
Print	The report is printed to the printer you have selected.
Preview	The report is previewed on your screen. See Previewing reports 276 for more information.
Email	The report is sent via email as a PDF attachment.

9.17 Exporting and importing projects

ProMaster Hardware allows for the interchange of project between ProMaster Hardware installations.

This is particularly useful for lock manufacturers who specify and win a project, then pass the project on to a supplier for the supply, finishing and installation of the goods.

Here are a few important facts:

- You can export the whole project or just a snapshot without activity (quotes etc).
- You can include full inventory data including installation and specification sheets.
- The export file carries a description, allowing you to convey information of your choice to the recipient.

9.17.1 Exporting projects

Getting started

- You must be logged in with a project open.
- From the **File** menu, select **Export** then **Export to ProMaster Hardware 7**.

Exporting data

- Choose where the export file will be created.

- If you wish, you may enter a description of the file. The recipient will see this prior to importing the project.

Option	Description
Export everything so the project is a complete set of data for the project	An exact copy of the project in its current state is exported.
Export a snapshot of doors and hardware and exclude all activity such as quotes, variations etc	Doors are exported with the exact quantities of inventory etc, but all data that is activity related, such as quotes, variations, shipments and installations is not exported. Where doors have activity on variations this is included in the export, but applied as part of the base project since there are no variations included in this export.
Include project inventory prices in the export when making a snapshot	When exporting a snapshot (i.e, not quotes etc) this option controls whether or not project inventory prices are included in the export. If turned off, it excludes prices and costs, effectively turning off the option "Include inventory costs in the export".
Export only the following associate	When exporting a snapshot (i.e, not quotes etc) this option allows you to choose a single associate to include in the export (e.g. the architect) and thus all other associates are omitted from the exported data.
Include project documents in the export	You may choose to include project documents in the export. Including documents may make the export file much larger.
Include inventory costs in the export	You may choose if the inventory and quotes in the export contains your cost prices. If you uncheck this option, your cost prices are removed from the export. Quotation prices are modified so the quotation amount remains the same but the calculation is changed to reflect the removal of the cost price.
Include inventory documents in the export	Including inventory documents makes the export larger (assuming that documents exist) but including them makes a more complete set of data.

If you do not want the recipient to see your cost prices, be sure to **uncheck** the option **Include inventory costs in the export**.

9.17.2 Importing projects

Getting started

- You must be logged in without a project open.
- From the **File** menu, select **Import** then **Import from ProMaster Hardware 7**.

A simple wizard steps you through the process of choosing import options.

Importing data

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents

An overview of the data being import is shown for you to verify.

The exporter may or may not have chosen to include activity data. The availability of this data is shown.

The exporter may or may not have chosen to include project documents. The availability of this data is shown.

The exporter may or may not have chosen to include inventory documents. The availability of this data is shown.

The number of items of each type of data is shown.

Be sure to observe the origin of the file and the date that it was created.

- Click **Next**

Project number

If a project exists with the same project number you must either rename the existing project or rename the project you are importing. If there is no project with he same name then then you may choose to import the project without changing its name.

- Click **Next**

Project permissions

Choose who will be allowed to access the project after you import it.

- Click **Next**

Inventory items

All the part codes being imported are shown. If you have previously imported a project from the same source (another ProMaster Hardware user) and defined rules for any of the part codes, those rules are applied automatically.

Any part codes without a rule are shown as Undefined, even if the part code exists in your database.

For each part code that's rule is undefined you must choose one of the 5 options.

Use existing item: Available when an item exists in your inventory database with the same part code. The import will use the existing part code from your database.

Use another existing item: You must select another item from your inventory database. The import will use the item you selected.

Create item: Available when an item does not exist in your database with the same part code. The import will create the item being imported with the same part code.

Create item with altered part code: You will be prompted for a new part code. The import will create the item being imported with the new part code.

Change to project inventory item: A project specific inventory item is created and used instead of a global inventory item.

The Rules shown for each part code are:

Undefined: You have not yet specified how to bring the apply the part code during the import.

Use previously selected part code: A part code from your database will be substituted for the part from the import file. This rule appears if you have selected "Create inventory with different part code" during a previous import from the same source.

Use existing part code: The inventory from your database with the same part code will be used.

Create inventory: A new inventory item will be created in your global inventory with the same part code from the import file.

Create inventory with different part code: A new inventory item will be created in your global inventory with a new part code that you specify.

Convert to project inventory: The part code will be converted into a project inventory item and will not affect your global inventory.

- Click **Next**

Options

Choose if you want the project opened immediately.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

9.17.3 Exporting to ProMaster Master-Keying

To make the generation of master key systems more efficient, data may be exported from ProMaster Hardware to ProMaster Master-Keying 8 so that it does not need to be re-entered.

Here are a few important facts:

- Only doors flagged as Is Keyed are exported. Doors that are not thus flagged are not exported.
- You may choose to export all product for doors or just lockable products. See Inventory types56 for information about keyed product.
- If you have entered keys and keying, then it is included in the export.

Getting started

- You must be logged in with a project open.
- From the **File** menu, select **Export** then **Export to ProMaster Master Keying 8**.

Exporting data

- Choose where the export file will be created.
- If you wish, you may enter a description of the file. The recipient will see this prior to importing the project.
- Choose if you want to export all hardware on the doors or only that for the lockable product (locks and cylinders).

> To import this file into ProMaster Master-Keying, the version of ProMaster Master-Keying must be 7.7102.0.0 (November 2012) or greater. Fro long door numbers ProMaster Master-Keying 8.15901.0.0 or later is required.

9.17.4 Importing a project from Opening Studio

The import from Opening Studio is not a core feature included with ProMaster Hardware and is provided as a free add-on feature included for customers with active support and maintenance.

Getting started

- You must be logged in without a project open.
- From the **File** menu, select **Import** then **Import from Opening Studio**.

A simple wizard steps you through the process of choosing import options.

Importing data

Select the file to import

- Click **Select file** to select the file you are importing.
- Click **Next**

File contents

An overview of the data being import is shown for you to verify.

- Click **Next**

Project number

If a project exists with the same project number you must either rename the existing project or rename the project you are importing. If there is no project with he same name then then you may choose to import the project without changing its name.

- Click **Next**

Project permissions

Choose who will be allowed to access the project after you import it.

- Click **Next**

Inventory items

All the part codes being imported are shown. If you have previously imported a project from the same source (another ProMaster Hardware user) and defined rules for any of the part codes, those rules are applied automatically.

Any part codes without a rule are shown as Undefined, even if the part code exists in your database.

For each part code that's rule is undefined you must choose one of the 5 options.

Use existing item: Available when an item exists in your inventory database with the same part code. The import will use the existing part code from your database.

Use another existing item: You must select another item from your inventory database. The import will use the item you selected.

Create item: Available when an item does not exist in your database with the same part code. The import will create the item being imported with the same part code.

Create item with altered part code: You will be prompted for a new part code. The import will create the item being imported with the new part code.

Change to project inventory item: A project specific inventory item is created and used instead of a global inventory item.

The Rules shown for each part code are:

Undefined: You have not yet specified how to bring the apply the part code during the import.

Use previously selected part code: A part code from your database will be substituted for the part from the import file. This rule appears if you have selected "Create inventory with different part code" during a previous import from the same source.

Use existing part code: The inventory from your database with the same part code will be used.

Create inventory: A new inventory item will be created in your global inventory with the same part code from the import file.

Create inventory with different part code: A new inventory item will be created in your global inventory with a new part code that you specify.

Convert to project inventory: The part code will be converted into a project inventory item and will not affect your global inventory.

- Click **Next**

Options

If the project does not have a consultant, you will be required to select one.

If the project does not have a associate, you will be required to select one.

Choose if you want the project opened immediately.

- Click **Next**

Ready to finish

A summary is displayed.

Click **Finish** to perform the import.

9.18 Exporting data

This section describes how to get "back out" various sorts of project data so that you may share it with others or or manipulate it (e.g. using Microsoft Excel) for use externally.

9.18.1 Exporting project data to a csv file

Getting started

- You must be logged in with a project open.
- From the **File** menu, select **Export** then **Export project data (CSV)**.

A simple wizard steps you through the process of choosing where the data will be written, choosing which data to export and choosing export options.

Multiple types of data may be exported at the same time. Each type of data is written to a separate file, named according to the type of data.

> When choosing the range of data to export, you may right click on the list for selection options. The types of data are defined in logical groups allowing you to select or deselect the whole group in a single operation.

Appendix

Part 10

10 Appendix

10.1 Diagnostic functions

10.1.1 Diagnosing a bad connection

If you are unable to connect to the ProMaster Hardware database, you may gain some insight into the problem by running the Diagnose connection routines.

Getting Started

- On the main ProMaster Hardware window, select the Environment you are unable to connect to.
- From the **Tools** menu, select the item **Diagnose database connection**

At the top your connection details are shown, so the first thing you should determine is if this information is correct.

Running a test

Depending on the edition you are running, there will be one or more tests available. To perform a test, first highlight the test that you want, then click the **Test** button. The results of the test are displayed at the bottom of the window, and when a test is completed successfully the test is flagged with a check mark.

The tests - Basic edition

Test database connection

This test attempts to connect to the database and reports any errors that occur.

The tests - Premium edition

Resolve host

This test takes the host name and resolves it to an IP Address. If the host name is already an IP Address (e.g. 127.0.0.1) then the Resolve host test will indicate that the host name does not need to be resolved. In all other cases, the test should resolve the host name to the IP Address of the machine that is hosting the database. If the name cannot be resolved, first check that the host name is correct, then address the name resolution issue with your computer network support person.

Ping host

This test attempts to ping the host. While a successful outcome for this test is useful in knowing that communication is possible, a failed test does not necessarily indicate a problem as the host machine may be configured to not respond to ping requests, or another network appliance may be blocking the ping (ICMP) requests.

Resolve service port

This test is offered only if the Server name contains a service port reference. This test looks up the service port name specified and expects to resolve it to a port number.

Test port

This test attempts to open a socket on the host machine on on the port specified in the Server name, or that resolved from the service port name if a service port name was specified. This test must succeed otherwise there is a problem. The success of this test does not however indicate that the Firebird database engine is the process that responded to the test, and in rare cases the socket connection request may be answered by another process that has hijacked the database port on the host machine.

Test database connection

This is the definitive test. If this test passes then ProMaster Hardware should connect to the database, whereas if this test fails then ProMaster Hardware will fail to operate. Any error messages returned from this test are indicators of the source of any problems.

10.1.2 Fixing internal numbering

Internally, ProMaster Hardware tracks and identifies data in a way that is not visible to the user.

If the need arises during a technical support incident, you may be asked to perform the following operation.

Getting started

- You must be logged in as the **admin** user
- From the **Tools** menu, select **Synchronize internal numbering**
- Click the **OK** button to proceed.

The operation may take a small amount of time, dependent on the amount of data in your database.

> Never run this process while other users are using ProMaster Hardware. Run this process only if you are asked to by WH Software Limited support staff.

10.2 File formats used by ProMaster Hardware

This section gives an overview of the CSV file format and describes each of the CSV files that are used for importing data.

10.2.1 CSV file format definition

Wherever data may be imported into ProMaster Hardware from a Comma Separated File (CSV), the contents expected within the file vary according to the type of data and that is discussed in the applicable topic. This topic discusses the physical structure of a CSV file and therefore this section forms an integral part of the learning for any CSV import.

File Format

The CSV file follows standard CSV file conventions with regard to its physical structure.

That is:

- Each line in the file contains a single record.
- Each line in the file is terminated by a Carriage Return and Line Feed pair of characters.
- Within each record (line) fields are delimited (separated) by using a single comma.
- A delimiting comma must not appear after the final field in each line.
- Each line must contain the same number of fields.
- Any field that contains a comma (,) or quotation mark (") must be quoted according to standard quoting rules (The field is prefixed and suffixed with a quotation mark, and any quotation mark is repeated)
- Additionally, each line must contain the same number of fields as the first line of the file. Exercise caution using programs like Excel that will modify a perfectly readable csv file and remove trailing delimiters thereby making a different number of fields on each line. Before saving from Excel, the addition of a column containing arbitrary data (e.g. a single letter) as the rightmost column avoids this problem in Excel and when importing the data file into ProMaster Hardware that rightmost column can be ignored just like any other column that you do not require.

> ProMaster Hardware is Unicode capable and will detect the file format being imported if it includes the standard preamble characters to designate the file as UTF-8, UTF-16BE or UTF16LE. If the preamble characters are not present for one of these three formats then the data file will be treated as an ASCII file.
>
> ProMaster Hardware exports CSV data in UTF-8 format (including the preamble) unless the export is for a specific purpose where only ASCII would be possible.

File Names

CSV files should always be supplied with:

- A file name that clearly describes the file contents
- The file extension being .csv

Headings

It is common when using CSV files for the first line in the file to contain field or column heading that describe the data on the subsequent lines.

ProMaster Hardware will accept a file with or without the first line containing headings, however it is strongly recommended that the file does contain these headings as it effectively documents the data that is contained within the file and also ProMaster Hardware will read these headings to automatically determine the contents of each field. This is particularly important as ProMaster Hardware does not mandate the order in which fields appear in the CSV file.

Omitting the headings means that the person importing the data into ProMaster Hardware will do so with less certainty about the fields being imported.

10.2.2 Global data file formats

10.2.2.1 Associate contact import (CSV) file format

ProMaster Hardware provides a wizard for importing associate contact data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Associate name	Character, length is not important as the value provided gets	Yes	associatename	

	mapped onto existing values.			
Name	Character(50)	Yes	contactname	
Code	Character (30), upper case	No	associatecontactcode	But must be present if this field is being imported. See warning later.
Title	Character(100)	No	contacttitle	
Active	Boolean, False being one of 'F', 'False', '0', 'N', 'No' and True being one of 'T', 'True', '1', 'Y', 'Yes'	No	isactive	
Use delivery addr	Boolean, False being one of 'F', 'False', '0', 'N', 'No' and True being one of 'T', 'True', '1', 'Y', 'Yes'	No	usecontactdeliveryaddress	
Delivery address 1	Character (30)	No	deliveryaddress1	
Delivery address 2	Character (30)	No	deliveryaddress2	
Delivery address 3	Character (30)	No	deliveryaddress3	
Delivery address 4	Character (30)	No	deliveryaddress4	
Delivery city	Character (30)	No	deliverycity	
Delivery state	Character (5)	No	deliverystate	
Delivery post code	Character (10)	No	deliverypostcode	
Delivery country	Character (30)	No	deliverycountry	
Use postal addr	Boolean, False being one of 'F', 'False', '0', 'N', 'No' and True being one of 'T', 'True', '1', 'Y', 'Yes'	No	usecontactpostaladdr	
Postal address 1	Character (30)	No	postaladdress1	
Postal address 2	Character (30)	No	postaladdress2	
Postal address 3	Character (30)	No	postaladdress3	
Postal address 4	Character (30)	No	postaladdress4	
Postal city	Character (30)	No	postalcity	
Postal state	Character (5)	No	postalstate	
Postal post code	Character (10)	No	postalpostcode	
Postal country	Character (30)	No	postalcountry	

Phone	Character (20)	No	phone	
Fax	Character (20)	No	fax	
Mobile ph	Character (20)	No	MobilePhone	
Email	Character (200)	No	email	

If associate contact codes are being imported then they must exist for all associates contacts. If an associate contact code is being imported, existing associate contacts are located by associate code then, if not found, by associate contact name. If an associate contact code is not being imported then existing associate contacts are located by associate contact name.

10.2.2.2 Associate import (CSV) file format

ProMaster Hardware provides a wizard for importing associate data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Associate name	Character (50)	Yes	associatename	
Associate code	Character (30), upper case	No	associatecode	But must be present if this field is being imported. See warning later.
Active	Boolean, False being one of 'F', 'False', '0', 'N', 'No' and True being one of 'T', 'True', '1', 'Y', 'Yes'	No	isactive	
Description	Character (200)	No	description	
Delivery address 1	Character (30)	No	deliveryaddress1	
Delivery address 2	Character (30)	No	deliveryaddress2	
Delivery address 3	Character (30)	No	deliveryaddress3	

Delivery address 4	Character (30)	No	deliveryaddress4	
Delivery city	Character (30)	No	deliverycity	
Delivery state	Character (5)	No	deliverystate	
Delivery post code	Character (10)	No	deliverypostcode	
Delivery country	Character (30)	No	deliverycountry	
Postal address 1	Character (30)	No	postaladdress1	
Postal address 2	Character (30)	No	postaladdress2	
Postal address 3	Character (30)	No	postaladdress3	
Postal address 4	Character (30)	No	postaladdress4	
Postal city	Character (30)	No	postalcity	
Postal state	Character (5)	No	postalstate	
Postal post code	Character (10)	No	postalpostcode	
Postal country	Character (30)	No	postalcountry	
Phone	Character (20)	No	phone	
Fax	Character (20)	No	fax	
E3 Code	Character (30), upper case	No	e3code	Available only if application parameters have E3 functionality turned on.
Associate type	Character, length is not important as the value provided gets mapped onto existing values.	Yes	associatetype	Required for adding associates, not required for updating existing associates

> If associate codes are being imported then they must exist for all associates. If an associate code is being imported, existing associates are located by associate code then, if not found, by associate name. If an associate code is not being imported then existing associates are located by associate name.

10.2.2.3 Associate type import (CSV) file format

ProMaster Hardware provides a wizard for importing associate type data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Description	Character (100)	Yes	description	

10.2.2.4 Branch address import (CSV) file format

ProMaster Hardware provides a wizard for importing branch address data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Description	Character (100)	Yes	dscription	
Postal address 1	Character (30)	Yes	postaladdress1	
Postal address 2	Character (30)	No	postaladdress2	
Postal address 3	Character (30)	No	postaladdress3	
Postal address 4	Character (30)	No	postaladdress4	
Postal city	Character (30)	No	postalcity	
Postal state	Character (5)	No	postalstate	
Postal post code	Character (10)	No	postalpostcode	
Postal country	Character (30)	No	postalcountry	
Phone	Character (20)	No	phone	
Fax	Character (20)	No	fax	

10.2.2.5 Consultant description import (CSV) file format

ProMaster Hardware provides a wizard for importing consultant description data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Description	Character (100)	Yes	description	

10.2.2.6 Consultant import (CSV) file format

ProMaster Hardware provides a wizard for importing consultant data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Name	Character (50)	Yes	consultantname	
Email	Character (200)	No	email	
Phone 1	Character (20)	No	phone1	
Phone 2	Character (20)	No	phone2	
Mobile ph	Character (20)	No	mobilephone	
Active	Boolean, False being one of 'F', 'False', '0', 'N', 'No' and True being one of 'T', 'True', '1', 'Y', 'Yes'	No	isactive	

10.2.2.7 Door extra data names import (CSV) file format

ProMaster Hardware provides a wizard for importing door extra data names data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Name	Character (100)	Yes	doorextraname	

10.2.2.8 Door finish defaults import (CSV) file format

ProMaster Hardware provides a wizard for importing door finish default data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Description	Character (100)	Yes	description	
Short description	Character (10)	Yes	shortdescription	

10.2.2.9 Door handing defaults import (CSV) file format

ProMaster Hardware provides a wizard for importing door handing default data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Description	Character (100)	Yes	description	
Short description	Character (10)	Yes	shortdescription	

10.2.2.10 Door type defaults import (CSV) file format

ProMaster Hardware provides a wizard for importing door type default data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Description	Character (100)	Yes	description	
Short description	Character (10)	Yes	shortdescription	

10.2.2.11 Frame finish defaults import (CSV) file format

ProMaster Hardware provides a wizard for importing frame finish default data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes

Description	Character (100)	Yes	description	
Short description	Character (10)	Yes	shortdescription	

10.2.2.12 Frame type defaults import (CSV) file format

ProMaster Hardware provides a wizard for importing frame type default data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Description	Character (100)	Yes	description	
Short description	Character (10)	Yes	shortdescription	

10.2.2.13 Inventory active/inactive import (CSV) file format

ProMaster Hardware provides a wizard for importing inventory active/inactive data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Part code	Character (30), upper case	Yes	partcode	

> There is no field to specify if the part codes are to be made active or inactive - this is a choice during the import

10.2.2.14 Inventory brand import (CSV) file format

ProMaster Hardware provides a wizard for importing inventory brand data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Brand	Character (100)	Yes	brandname	
Web	Character (250)	No	webaddress	

10.2.2.15 Inventory document import (CSV) file format

ProMaster Hardware provides a wizard for importing inventory document data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required. This applies to all four document imports available for inventory.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Part code	Character (30), upper case	Yes	partcode	
File name	Character	Yes	filename	Only the file name, must not include a folder name

> The folder from where the documents are loaded is the folder that contains the CSV file you are importing and then a sub folder according to the type of document import being performed.

For specification documents the files must be in a sub folder called **InvDocSpecSheet**
For installation documents the files must be in a sub folder called **InvDocInstallSheet**
For product description documents the files must be in a sub folder called **InvDocDescriptionSheet**
For application notes documents the files must be in a sub folder called **InvDocAppNotesSheet**

10.2.2.16 Inventory finish import (CSV) file format

ProMaster Hardware provides a wizard for importing inventory finish data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Description	Character (100)	Yes	description	
Short description	Character (10)	Yes	shortdescription	

10.2.2.17 Inventory import (CSV) file format

ProMaster Hardware provides a wizard for importing inventory data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Part code	Character (30), upper case	Yes	partcode	

Description	Character (200)	Yes for new items	description	
Type	Character, length is not important as the value provided gets mapped onto existing values.	Yes for new items	inventorytype	
Brand	Character, length is not important as the value provided gets mapped onto existing values.	Yes for new items	brand	
Finish	Character, length is not important as the value provided gets mapped onto existing values.	No	finish	
Active	Boolean, False being one of 'F', 'False', '0', 'N', 'No' and True being one of 'T', 'True', '1', 'Y', 'Yes'	No	active	
Units	Character (10)	No	itemunits	
Weight	Numeric, between 0 and 9999.999 with maximum 3 decimal places	No	itemweight	Expresses in Kg
Volume	Numeric, between 0 and 999.999999 with maximum 6 decimal places	No	itemvolume	Expressed in m^3
Supplier 1	Character, length is not important as the value provided gets mapped onto existing values.	No	supplier1	
Supplier part code 1	Character (30), upper case	No	supplierpartcode1	
Supplier lead days 1	Numeric, between 0 and 9999	No	leadtimedays1	
Supplier 2	Character, length is not important as the value provided gets mapped onto existing values.	No	supplier2	
Supplier part code 2	Character (30), upper case	No	supplierpartcode2	
Supplier lead days 2	Numeric, between 0 and 9999	No	leadtimedays2	
Manufacturer part code	Character (30), upper case	No	manufacturerpartcode	
Minimum purchase quantity	Numeric, between 0 and 9999	No	minpurchasequantity	
Product cost	Numeric, between 0 and 9999999.99 with maximum 2 decimal places	No	productcost	
Product RRP	Numeric, between 0 and 9999999.99 with maximum 2 decimal places	No	productrrp	

Product get price each usage	Boolean, False being one of 'F', 'False', '0', 'N', 'No' and True being one of 'T', 'True', '1', 'Y', 'Yes'	No	getproductpriceeachusage	
Product price date	In the date format configured for your computer (e.g. dd/mm/yyyy) and between 1 Jan 2000 and one year in the future	No	productpricedate	
Dryfit cost	Numeric, between 0 and 9999999.99 with maximum 2 decimal places	No	dryfitcost	
Dryfit RRP	Numeric, between 0 and 9999999.99 with maximum 2 decimal places	No	dryfitrrp	
Dryfit price date	In the date format configured for your computer (e.g. dd/mm/yyyy) and between 1 Jan 2000 and one year in the future	No	dryfitpricedate	
Install cost	Numeric, between 0 and 9999999.99 with maximum 2 decimal places	No	installcost	
Install RRP	Numeric, between 0 and 9999999.99 with maximum 2 decimal places	No	installrrp	
Install get price each usage	Boolean, False being one of 'F', 'False', '0', 'N', 'No' and True being one of 'T', 'True', '1', 'Y', 'Yes'	No	getinstallpriceeachusage	
Install price date	In the date format configured for your computer (e.g. dd/mm/yyyy) and between 1 Jan 2000 and one year in the future	No	installpricedate	
Standard markup	Numeric, between 0 and 10000.000 with maximum 3 decimal places	No	standardmarkup	
Use finishing size	Boolean, False being one of 'F', 'False', '0', 'N', 'No' and True being one of 'T', 'True', '1', 'Y', 'Yes'	No	usefinishingsize	
Ship item individually	Boolean, False being one of 'F', 'False', '0', 'N', 'No' and True being one of 'T', 'True', '1', 'Y', 'Yes'	No	shipitemindividually	
Supply by others	Boolean, False being one of 'F', 'False', '0', 'N', 'No' and True being one of 'T', 'True', '1', 'Y', 'Yes'	No	supplybyothers	
Default dryfit	Boolean, False being one of 'F', 'False', '0', 'N', 'No' and True being one of 'T', 'True', '1', 'Y', 'Yes'	No	defaultdryfit	
Default install	Boolean, False being one of 'F', 'False', '0', 'N', 'No' and True being one of 'T', 'True', '1', 'Y', 'Yes'	No	defaultinstall	
Default finishing	Boolean, False being one of 'F', 'False', '0', 'N', 'No' and True being one of 'T', 'True', '1', 'Y', 'Yes'	No	defaultfinishing	

10.2.2.18 Inventory image import (CSV) file format

ProMaster Hardware provides a wizard for importing inventory image data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Part code	Character (30), upper case	Yes	partcode	
File name	Character	Yes	filename	Only the file name, must not include a folder name

The folder from where the pictures are loaded is the folder that contains the CSV file you are importing and then a sub folder **InvImage**

10.2.2.19 Inventory part code change import (CSV) file format

ProMaster Hardware provides a wizard for importing inventory part code change data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Part code	Character (30), upper case	Yes	partcode	
New part code	Character (30), upper case	Yes	newpartcode	

There is no field to specify if the part codes are to be made active or inactive - this is a choice during the import

10.2.2.20 Inventory rating country import (CSV) file format

ProMaster Hardware provides a wizard for importing inventory rating country data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Name	Character (100)	Yes	name	

10.2.2.21 Inventory rating import (CSV) file format

ProMaster Hardware provides a wizard for importing inventory rating data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Country	Character, length is not important as the value provided gets mapped onto existing values.	Yes	country	

Rating	Character (10)	Yes	rating	
Description	Character (200)	Yes	description	

10.2.2.22 Inventory type import (CSV) file format

ProMaster Hardware provides a wizard for importing inventory type data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Description	Character (100)	Yes	description	
Short description	Character (10)	Yes	shortdescription	
Category	Character (1)	Yes		O or 0 for Other L for Lock D for Double cylinder C for Cylinder

10.2.2.23 Lock function defaults import (CSV) file format

ProMaster Hardware provides a wizard for importing lock function default data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes

Description	Character (100)	Yes	description	
Short description	Character (10)	Yes	shortdescription	

10.2.2.24 Project extra data names import (CSV) file format

ProMaster Hardware provides a wizard for importing project extra data names data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Name	Character (100)	Yes	projectextraname	

10.2.2.25 Project status import (CSV) file format

ProMaster Hardware provides a wizard for importing project status data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Project number	Character (20)	Yes	projectnumber	
Status	Character (1)	Yes	status	Z for complete X for cancelled L for lost

Finalised date	Date	Yes	date	must be with today - 2 years and today + 1 year
Lost description	Character(200)	N	description	If the status is being changed to "Lost" then this description will be recorded against the project.

10.2.2.26 Supplier import (CSV) file format

ProMaster Hardware provides a wizard for importing supplier data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Name	Character (50)	Yes	suppliername	
Code	Character (30), upper case	No	suppliercode	But must be present if this field is being imported. See warning later.
Active	Boolean, False being one of 'F', 'False', '0', 'N', 'No' and True being one of 'T', 'True', '1', 'Y', 'Yes'	No	isactive	
Contact	Character (50)	No	contactname	
Delivery address 1	Character (30)	No	deliveryaddress1	
Delivery address 2	Character (30)	No	deliveryaddress2	
Delivery address 3	Character (30)	No	deliveryaddress3	
Delivery address 4	Character (30)	No	deliveryaddress4	
Delivery city	Character (30)	No	deliverycity	
Delivery state	Character (5)	No	deliverystate	
Delivery post code	Character (10)	No	deliverypostcode	

Delivery country	Character (30)	No	deliverycountry	
Postal address 1	Character (30)	No	postaladdress1	
Postal address 2	Character (30)	No	postaladdress2	
Postal address 3	Character (30)	No	postaladdress3	
Postal address 4	Character (30)	No	postaladdress4	
Postal city	Character (30)	No	postalcity	
Postal state	Character (5)	No	postalstate	
Postal post code	Character (10)	No	postalpostcode	
Postal country	Character (30)	No	postalcountry	
Phone	Character (20)	No	phone	
Fax	Character (20)	No	fax	
Mobile ph	Character (20)	No	mobilephone	
Email	Character(200)	No	Email	
Web	Character(250)	No	webaddress	

If supplier codes are being imported then they must exist for all suppliers. If a supplier code is being imported, existing suppliers are located by supplier code, then if not found, by supplier name. If an supplier code is not being imported then existing suppliers are located by supplier name.

10.2.3 Project data file formats

10.2.3.1 Door import (CSV) file format

ProMaster Hardware provides a wizard for importing door data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Door number	Character (20), upper case	Yes	doornumber	
Description	Character (200)	No	doordescription	
Area	Character (200)	No	area	
Stage	Character (50)	No	stage	

Handing	Character, length is not important as the value provided gets mapped onto existing values.	No	handing	
Door type	Character, length is not important as the value provided gets mapped onto existing values.	No	doortype	
Door finish	Character, length is not important as the value provided gets mapped onto existing values.	No	doorfinish	
Frame type	Character, length is not important as the value provided gets mapped onto existing values.	No	frametype	
Frame finish	Character, length is not important as the value provided gets mapped onto existing values.	No	framefinish	
Rating	Character, length is not important as the value provided gets mapped onto existing values.	No	rating	
Stamping	Character (20), upper case	No	stamping	
Is keyed	Boolean, False being one of 'F', 'False', '0', 'N', 'No' and True being one of 'T', 'True', '1', 'Y', 'Yes'	No	iskeyed	
Door height	Character (20)	No	doorheight	
Door width	Character (20)	No	doorwidth	
Door thickness	Character (20)	No	doorthickness	

Project inventory set	Character, length is not important as the value provided gets mapped onto existing values.	No	projectinventoryset	For doors being added and for doors that have no inventory items, the contents of the set will be applied to the door. For doors that already have items the project inventory set will be ignored. When items are added, the standard rules for dryfit, install, finishing and supply by others are applied.

10.2.3.2 Door rename import (CSV) file format

ProMaster Hardware provides a wizard for importing door renaming data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Door number	Character (20), upper case	Yes	doornumber	Must match an existing door
New door number	Character (20), upper case	Yes	newdoornumber	Must not match an existing door.

10.2.3.3 Door inventory import (CSV) file format

ProMaster Hardware provides a wizard for importing door inventory data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Door number	Character (20), upper case	Yes	doornumber	Must be a existing door number
Short part code	Character (30), upper case	Yes*	shortpartcode	Required if project uses short part codes, otherwise not required.
Part code	Character (30), upper case	Yes*	partcode	Required if project does not use short part codes, otherwise not required.
Product quantity	Integer (0..9999)	Yes	productquantity	
Dryfit quantity	Integer (0..9999)	Yes*	dryfitquantity	Required if project uses dryfit
Install quantity	Integer (0..9999)	Yes*	installquantity	Required if project uses install
Finishing quantity	Integer (0..9999)	Yes*	finishingquantity	Required if project uses finishing
Dryfit note	Character (200)	No	dryfitnote	
Install note	Character (200)	No	installnote	
Finishing note	Character (200)	No	finishingnote	

10.2.3.4 Door extra data import (CSV) file format

ProMaster Hardware provides a wizard for importing door extra data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Door number	Character (20), upper case	Yes	doornumber	Must be a existing door number
Extra name	Character (100)	Yes	extraname	Combination of Door number and Extra name must be unique.
Extra value	Character (1000)	Yes	extravalue	

10.2.3.5 Door finish import (CSV) file format

ProMaster Hardware provides a wizard for importing door finish data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Description	Character (100)	Yes	description	
Short description	Character (10)	Yes	shortdescription	

10.2.3.6 Door handing import (CSV) file format

ProMaster Hardware provides a wizard for importing door handing data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Description	Character (100)	Yes	description	
Short description	Character (10)	Yes	shortdescription	

10.2.3.7 Door type import (CSV) file format

ProMaster Hardware provides a wizard for importing door type data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Description	Character (100)	Yes	description	
Short description	Character (10)	Yes	shortdescription	

10.2.3.8 Frame finish import (CSV) file format

ProMaster Hardware provides a wizard for importing frame finish data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Description	Character (100)	Yes	description	
Short description	Character (10)	Yes	shortdescription	

10.2.3.9 Frame type import (CSV) file format

ProMaster Hardware provides a wizard for importing frame type data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Description	Character (100)	Yes	description	
Short description	Character (10)	Yes	shortdescription	

10.2.3.10 Key import (CSV) file format

ProMaster Hardware provides a wizard for importing key data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Key number	Character (20), upper case	Yes	keynumber	
Description	Character (200)	No	keydescription	
Category	Character (30)	No	category	
Key above	Character (20)	No	keyabove	if key above is specified, it must be in the import file prior to where it is specified as a key above or must already exist in the database. The designation of any key specified as a key above must be 'M'.
Designation	Character (1)	No	designation	Valid values are: Blank = not specified M = Master key C = Change key S = Selective key This field is used when exporting data to ProMaster Master Keying. If you do not understand the master keying requirements you should leave designation blank rather than specifying incorrect data.

10.2.3.11 Keying import (CSV) file format

ProMaster Hardware provides a wizard for importing keying data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Key number	Character (20), upper case	Yes	keynumber	Must be a existing key number
Door number	Character (20), upper case	Yes	doornumber	Must be a existing door number

10.2.3.12 Lock function import (CSV) file format

ProMaster Hardware provides a wizard for importing lock function data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Description	Character (100)	Yes	description	
Short description	Character (10)	Yes	shortdescription	

10.2.3.13 Quote costs and prices import (CSV) file format

ProMaster Hardware provides a wizard for importing quote costs and prices data that is supplied in a comma separated values (CSV) file. This topic explains the file contents required.

For information about the physical structure of a CSV file, read the topic CSV file format definition 235

Headings

The table below shows one heading that ProMaster Hardware will accept for automatically determining the contents of each field. For each field there are several variations that are checked.

For example, to determine a field containing the **Part Code** from the heading, the following headings are matched: part code, partcode, part, code, part no, partno, sku, article.

Additionally, headings are matched in a case insensitive manner.

Fields

The order of the fields within the CSV file is not important as the ProMaster Hardware CSV import wizard provides a powerful interface for selecting the source of each item of data.

The following table list all the fields that ProMaster Hardware will accept for this import.

Field Name	Type/ Max Len	Reqd	Heading	Notes
Part Code	Character (30), upper case	Yes	partcode	
Product Cost	Numeric, between 0 and 999999.99 with maximum 2 decimal places	yes if ProductPrice present	productcost	
Product Price	Numeric, between 0 and 999999.99 with maximum 2 decimal places	yes if ProductCost present	productprice	
Dryfit Cost	Numeric, between 0 and 999999.99 with maximum 2 decimal places	yes if DryfitPrice present	dryfitcost	
Dryfit Price	Numeric, between 0 and 999999.99 with maximum 2 decimal places	yes if DryfitCost present	dryfitprice	
Install Cost	Numeric, between 0 and 999999.99 with maximum 2 decimal places	yes if InstallPrice present	installcost	
Install Price	Numeric, between 0 and 999999.99 with maximum 2 decimal places	yes if InstallCost present	installprice	
Finishing Cost	Numeric, between 0 and 999999.99 with maximum 2 decimal places	yes if FinishingPrice present	finishingcost	
Finishing Price	Numeric, between 0 and 999999.99 with maximum 2 decimal places	yes if FinishingCost present	finishingprice	

10.3 Merge fields

In quotes, shipments, installs and claims you may form a document that is a template with merge fields. The merge fields get converted to data each time the data is saved or its status changes.

In these four areas, the merge fields are accessed by right clicking on the document and choosing the menu option to insert a merge field.

Some merge fields are available everywhere (e.g. Project Number) and others are specific to a purpose such as quotes.

Merge field syntax

Merge fields are enclosed in brackets "[" ... "]". The field name must be correct and is case sensitive. The field and the enclosing brackets may be formatted (e.g. fond, bold, alignment) but the formatting must apply to the entire merge field and enclosing brackets or ProMaster Hardware will not consider the text with discontinuous formatting to be a merge field.

Here is how to insert the project delivery address: [Proj_Addr_Del]

Parameters

Some merge fields take parameters that modify the way they appear.

Parameters are separated by a semi-colon.

[Proj_Addr_Del] will insert the project delivery address formatted onto multiple lines. To have the address appear on a single line, the address merge field takes a parameter "SL".

To insert the project delivery address on a single line: [Proj_Addr_Del;SL]

Some merge fields take multiple parameters.

For example in a quote, [Quot_DoorType_Table] inserts a table of prices by door type.

This field may be modified by the following parameters:

TotalOnly: omits the breakdown of product, dryfit, installation, finishing and total and instead shows only a total price.

NoBorder: omits the borders around the table and cells.

Widths: allows you to specify the widths as a percentage of the page width. The first width % is for the door type and the second width % is for all price columns. The total percentage must add up to 100 or less.

DoorTypeOnly: allows you to specify the only door types that are to be shown in the table. Multiple values separated by a comma. May be short codes or full description. Case insensitive. If descriptions contain a comma or quote character then use CSV quoting syntax.

DoorTypeExclude: allows you to specify the door types that are not to be shown in the table. Syntax same as DoorTypeOnly. Mutually exclusive with DoorTypeOnly.

For example, [Quot_DoorType_Table;Widths=20,10] shows a table where the door type is 20% of the width of the page and each price column is 10% of the width of the page.

Combining parameters, [Quot_DoorType_Table;TotalOnly;Widths=20,10;DoorTypeOnly=Timber,Aluminium] shows a table where the door type is 20% of the width of the page and only a total price is shown, being 10% of the width of the page, hence the table will be 30% of the width of the page. Only door types "Timber" and "Aluminium" will be shown in the table.

10.3.1 Quote merge fields

The following merge fields are available in quotes.

Field	Description	Parameters
Group: Company		
Comp_Name	Company name - the name the ProMaster Hardware is registered to.	
Comp_Addr	Company address. See Company information 38 for setting up this data and other company related merge fields.	**SL**: Put the address on a single line instead of formatted onto multiple lines.

Comp_Ph	Company phone number.	
Comp_Fax	Company fax number.	
Comp_Bank	Company bank.	
Comp_BankAcctName	Company bank account name.	
Comp_BankAcctNo	Company bank account number.	
Group: Associate		
Assoc_Name	Associate name	
Assoc_Code	Associate code	
Assoc_Addr_Phys	Associate physical address	**SL**: See above.
Assoc_Addr_Post	Associate postal address	**SL**: See above.
Assoc_Ph	Associate phone number	
Assoc_Fax	Associate fax number	
Group: Associate contact		
AssocCont_Name	Associate contact name	
AssocCont_Title	Associate contact title	
AssocCont_Code	Associate contact code	
AssocCont_Addr_Phys	Associate contact physical address	**SL**: See above.
AssocCont_Addr_Post	Associate contact postal address	**SL**: See above.
AssocCont_Ph	Associate contact phone number	
AssocCont_MobPh	Associate contact mobile number	
AssocCont_Fax	Associate contact fax number	
AssocCont_Email	Associate contact email address	
Group: Consultant		
Cons_Name	Main consultant name	
Cons_Email	Main consultant email address	
Cons_Ph	Main consultant phone number	
Cons_Ph2	Main consultant second phone number	
Cons_MobPh	Main consultant mobile number	
Group: Project		
Proj_No	Project number	
Proj_Desc	Project site description	
Proj_Addr_Phys	Project physical address	**SL**: See above.
Proj_Addr_Del	Project postal address	**SL**: See above.
Proj_Ph_Del	Project delivery phone number	
Proj_Cont_Del	Project delivery contact name	
Proj_AcctNo	Project account number for claims	
Extra_List	Table of project extra values (ValueOnly, NoBorder, Widths) See Project extra data 92. Only data flagged for display will be included in the table.	**ValueOnly**: Show only the value column, omitting the name column. **NoBorder**: Omit the table border. **Widths**: Specify the column widths as percentage of the page. Two values, or one value if ValueOnly specified.

Group: Variation		
Var_No	Variation number - the variation number to which the quote belongs.	
Var_Desc	Variation description. See Entering variations 180 .	
Var_Auth	Variation authorisation. See Entering variations 180 .	
Group: Quote		
Quot_No	Quote number	
Quot_Date	Quote date	
Quot_Price_Product	Quote product price	
Quot_Price_Dryfit	Quote dryfit price	
Quot_Price_Install	Quote install price	
Quot_Price_DI	Quote dryfit + install price	
Quot_Price_Finishing	Quote finishing price	
Quot_Price_DIF	Quote dryfit + install + finishing price	
Quot_Price_Total	Quote total price	
Quot_Price_Msg	Quote price annotation	
Quot_Var_Table	Table of quote variation summary - shows the value added in this variation and the value of previous variations and main contract which have diminished. This table gives a great insight into the value of the quote, but you may choose to omit it if you believe your associate would not benefit from it.	**TotalOnly**: Show only the total column, omitting the columns for product, dryfit, install, finishing. **NoBorder**: See above **Widths**: Specify the column widths as percentage of the page. Two values.
Quot_DoorType_Table	Table of prices by door type	**TotalOnly**: See above **ProductOnly:** Show only the product column, omitting the columns for dryfit, install, finishing. TotalOnly parameter should not be used with this parameter and will be ignored if it is included. **NoBorder**: See above **DoorTypeLongCode:** Forces long codes to be shown on projects using the short code. **Widths**: Specify the column widths as percentage of the page. Two values. **DoorTypeOnly**: Specify the only door types that are to be shown in the table. Multiple values separated by a comma. May be short codes or full description. Case insensitive. If descriptions contain a comma or quote character then use CSV quoting syntax

		DoorTypeExclude: Specify the door types that are not to be shown in the table. Syntax same as DoorTypeOnly. Mutually exclusive with DoorTypeOnly.
Quot_DoorArea_Table	Table of prices by door area	**TotalOnly**: See above **NoBorder**: See above **Widths**: Specify the column widths as percentage of the page. Two values.
Quot_DoorStage_Table	Table of prices by door stage	**TotalOnly**: See above **NoBorder**: See above **Widths**: Specify the column widths as percentage of the page. Two values.
Quot_DoorAreaType_Table	Table of prices by area and door type	**TotalOnly**: See above **NoBorder**: See above **DoorTypeLongCode**: Forces long codes to be shown on projects using the short code. **Widths**: Specify the column widths as percentage of the page. Two values.
Quot_DoorStageType_Table	Table of prices by stage and door type	**TotalOnly**: See above **NoBorder**: See above **DoorTypeLongCode**: Forces long codes to be shown on projects using the short code. **Widths**: Specify the column widths as percentage of the page. Two values
Quot_DoorStageArea_Table	Table of prices by stage and area	**TotalOnly**: See above **NoBorder**: See above **Widths**: Specify the column widths as percentage of the page. Two values.
Quot_Alternative_Table	Table of alternatives	

10.3.2 Shipment merge fields

The following merge fields are available in shipments.

Field	**Description**	**Parameters**
Group: Company		
Comp_Name	Company name - the name the ProMaster Hardware is registered to.	
Comp_Addr	Company address. See Company information 38 for setting up this data and other company related merge fields.	**SL**: Put the address on a single line instead of formatted onto multiple lines.
Comp_Ph	Company phone number.	

Comp_Fax	Company fax number.	
Comp_Bank	Company bank.	
Comp_BankAcctName	Company bank account name.	
Comp_BankAcctNo	Company bank account number.	
Group: Consultant		
Cons_Name	Main consultant name	
Cons_Email	Main consultant email address	
Cons_Ph	Main consultant phone number	
Cons_Ph2	Main consultant second phone number	
Cons_MobPh	Main consultant mobile number	
Group: Project		
Proj_No	Project number	
Proj_Desc	Project site description	
Proj_Addr_Phys	Project physical address	**SL**: See above.
Proj_Addr_Del	Project postal address	**SL**: See above.
Proj_Ph_Del	Project delivery phone number	
Proj_Cont_Del	Project delivery contact name	
Proj_AcctNo	Project account number for claims	
Extra_List	Table of project extra values (ValueOnly, NoBorder, Widths) See Project extra data 92 . Only data flagged for display will be included in the table.	**ValueOnly**: Show only the value column, omitting the name column. **NoBorder**: Omit the table border. **Widths**: Specify the column widths as percentage of the page. Two values, or one value if ValueOnly specified.
Group: Shipment		
Ship_No	Shipment number	
Ship_Date	Shipment date	
Ship_DateExpected	Shipment date expected	
Ship_ContactName	Shipment delivery contact name	
Ship_ContactPh	Shipment delivery contact phone	
Ship_Addr_Del	Shipment delivery address	**SL**: See above.
Ship_Package_Count	Shipment package count	
Ship_Door_Count	Shipment door count	
Ship_Item_Count	Shipment item count	
Ship_DoorArea_Table	Table of door areas	**NoBorder**: Omit the table border. **Widths**: Specify the column widths as percentage of the page. One value.
Ship_PartCode_Table	Table of part codes	**NoQuantity**: Omit the quantity of each item. **NoBorder**: Omit the table border.

		Widths: Specify the column widths as percentage of the page. Two values.

10.3.3 Install merge fields

The following merge fields are available in installs.

Field	**Description**	**Parameters**
Group: Company		
Comp_Name	Company name - the name the ProMaster Hardware is registered to.	
Comp_Addr	Company address. See Company information [38] for setting up this data and other company related merge fields.	**SL**: Put the address on a single line instead of formatted onto multiple lines.
Comp_Ph	Company phone number.	
Comp_Fax	Company fax number.	
Comp_Bank	Company bank.	
Comp_BankAcctName	Company bank account name.	
Comp_BankAcctNo	Company bank account number.	
Group: Consultant		
Cons_Name	Main consultant name	
Cons_Email	Main consultant email address	
Cons_Ph	Main consultant phone number	
Cons_Ph2	Main consultant second phone number	
Cons_MobPh	Main consultant mobile number	
Group: Project		
Proj_No	Project number	
Proj_Desc	Project site description	
Proj_Addr_Phys	Project physical address	**SL**: See above.
Proj_Addr_Del	Project postal address	**SL**: See above.
Proj_Ph_Del	Project delivery phone number	
Proj_Cont_Del	Project delivery contact name	
Proj_AcctNo	Project account number for claims	
Extra_List	Table of project extra values (ValueOnly, NoBorder, Widths) See Project extra data [92] . Only data flagged for display will be included in the table.	**ValueOnly**: Show only the value column, omitting the name column. **NoBorder**: Omit the table border. **Widths**: Specify the column widths as percentage of the page. Two values, or one value if ValueOnly specified.
Group: Install		
Install_No	Install number	
Install_Date	Install date	

Install_Door_Count	Install door count	
Install_Item_Count	Install item count	
Install_DoorArea_Table	Table of door areas	**NoBorder**: Omit the table border. **Widths**: Specify the column widths as percentage of the page. One value.
Install_PartCode_Table	Table of part codes	**NoQuantity**: Omit the quantity of each item. **NoBorder**: Omit the table border. **Widths**: Specify the column widths as percentage of the page. Two values.

10.3.4 Claim merge fields

The following merge fields are available in claims.

Field	**Description**	**Parameters**
Group: Company		
Comp_Name	Company name, the name the ProMaster Hardware is registered to.	
Comp_Addr	Company address. See Company information 38 for setting up this data and other company related merge fields.	**SL**: Put the address on a single line instead of formatted onto multiple lines.
Comp_Ph	Company phone number.	
Comp_Fax	Company fax number.	
Comp_Bank	Company bank.	
Comp_BankAcctName	Company bank account name.	
Comp_BankAcctNo	Company bank account number.	
Group: Associate		
Assoc_Name	Associate name	
Assoc_Code	Associate code	
Assoc_Addr_Phys	Associate physical address	**SL**: See above.
Assoc_Addr_Post	Associate postal address	**SL**: See above.
Assoc_Ph	Associate phone number	
Assoc_Fax	Associate fax number	
Group: Associate contact		
AssocCont_Name	Associate contact name	
AssocCont_Title	Associate contact title	
AssocCont_Code	Associate contact code	
AssocCont_Addr_Phys	Associate contact physical address	**SL**: See above.
AssocCont_Addr_Post	Associate contact postal address	**SL**: See above.
AssocCont_Ph	Associate contact phone number	
AssocCont_MobPh	Associate contact mobile number	

AssocCont_Fax	Associate contact fax number	
AssocCont_Email	Associate contact email address	
Group: Consultant		
Cons_Name	Main consultant name	
Cons_Email	Main consultant email address	
Cons_Ph	Main consultant phone number	
Cons_Ph2	Main consultant second phone number	
Cons_MobPh	Main consultant mobile number	
Group: Project		
Proj_No	Project number	
Proj_Desc	Project site description	
Proj_Addr_Phys	Project physical address	**SL**: See above.
Proj_Addr_Del	Project postal address	**SL**: See above.
Proj_Ph_Del	Project delivery phone number	
Proj_Cont_Del	Project delivery contact name	
Proj_AcctNo	Project account number for claims	
Extra_List	Table of project extra values (ValueOnly, NoBorder, Widths) See Project extra data 92 . Only data flagged for display will be included in the table.	**ValueOnly**: Show only the value column, omitting the name column. **NoBorder**: Omit the table border. **Widths**: Specify the column widths as percentage of the page. Two values, or one value if ValueOnly specified.
Group: Claim		
Claim_No	Claim number	
Claim_Date	Claim date	
Claim_Door_Count	Claim door count	
Claim_Item_Count	Claim item count	
Claim_Price_Msg	Claim price annotation	
Claim_IsFinal	If claim is final, shows a message. Default message is "Final claim" but this may be changed in the application parameters.	
MC_Price	Main contact price. The agreed price for the main contract.	
MC_Date	Main contact date	
Var_Price	Variation price. The agreed price for all variations.	
Claim_DateDue_LastOfSameMonth	Calculates a date from the claim date, being the last day of the same month.	
Claim_DateDue_LastOfFollowingMonth	Calculates a date from the claim date, being the last day of the following month.	
Claim_Amount_Product	Claim product amount. The total amount of product on this claim.	
Claim_Amount_Dryfit	Claim dryfit amount. The total amount of dryfit on this claim.	

Claim_Amount_Install	Claim install amount. The total amount of install on this claim.	
Claim_Amount_Finishing	Claim finishing amount. The total amount of finishing on this claim.	
Claim_Amount	Claim total amount.	
Claim_Total_Paid_Previous	Total amount paid on all previous claims.	
Claim_Total_Ret_Previous	Total amount retained on all previous claims.	
Claim_Outstanding_Previous	Total amount outstanding from all previous claims (total of claims less total paid less total retained)	
Claim_Amount_Plus_Outstanding	Total from this claim plus outstanding amount from all previous claims.	
Claim_Ret	Claim total retention amount. Calculated from the retention specification for the project, previous claim amounts, this claim amount and previous retention amounts.	
Claim_Ret_ToDate	Total retention amount calculated for each previous claim and also this claim.	
Claim_Amount_LessRet	Claim total amount less retention amount. Calculated from Claim_Amount and Claim_Ret.	
Claim_MC_Amount	Claim main contract amount. Amount of the claim that comes from the main contract.	
Claim_Var_Amount	Claim variation amount, Amount of the claim that comes from variations.	
Claim_MC_Total_Previous	Claim main contract total amount on previous claims, excludes this claim, calculated from Claim_MC_Amount.	
Claim_MC_Total_ToDate	Claim main contract total amount to date, includes this claim, calculated from Claim_MC_Amount.	
Claim_Var_Total_Previous	Claim variation total amount on previous claims, excludes this claim, calculated from Claim_Var_Amount.	
Claim_Var_Total_ToDate	Claim variation total amount to date, includes this claim, calculated from Claim_Var_Amount.	
Claim_Total_Previous	Claim total amount on previous claims, calculated from Claim_Amount.	
Claim_Total_ToDate	Claim total amount to date, calculated from Claim_Amount.	
Claim_Total_ToDate_LessRet	Calculated as Claim_Total_ToDate - Claim_Ret_ToDate.	
Claim_Summary_Table	Claim summary table. Columns are: Variation, Date quoted, Date accepted, Authorisation number, Quote total price, Claim total price, Claim to date percentage, Claim to date amount.	**NoBorder**: Omit the table border. **Widths**: Specify the column widths as percentage of the page. Eight values.
Claim_DoorArea_Table	Table of prices by door area	**TotalOnly**: See above **NoBorder**: See above

		Widths: Specify the column widths as percentage of the page. Two values.
Claim_DoorStage_Table	Table of prices by door stage	**TotalOnly**: See above **NoBorder**: See above **Widths**: Specify the column widths as percentage of the page. Two values.

10.3.5 Estimate merge fields

The following merge fields are available in estimates.

Field	**Description**	**Parameters**
Group: Company		
Comp_Name	Company name - the name the ProMaster Hardware is registered to.	
Comp_Addr	Company address. See Company information [38] for setting up this data and other company related merge fields.	**SL**: Put the address on a single line instead of formatted onto multiple lines.
Comp_Ph	Company phone number.	
Comp_Fax	Company fax number.	
Comp_Bank	Company bank.	
Comp_BankAcctName	Company bank account name.	
Comp_BankAcctNo	Company bank account number.	
Group: Associate		
Assoc_Name	Associate name	
Assoc_Code	Associate code	
Assoc_Addr_Phys	Associate physical address	**SL**: See above.
Assoc_Addr_Post	Associate postal address	**SL**: See above.
Assoc_Ph	Associate phone number	
Assoc_Fax	Associate fax number	
Group: Associate contact		
AssocCont_Name	Associate contact name	
AssocCont_Title	Associate contact title	
AssocCont_Code	Associate contact code	
AssocCont_Addr_Phys	Associate contact physical address	**SL**: See above.
AssocCont_Addr_Post	Associate contact postal address	**SL**: See above.
AssocCont_Ph	Associate contact phone number	
AssocCont_MobPh	Associate contact mobile number	
AssocCont_Fax	Associate contact fax number	
AssocCont_Email	Associate contact email address	
Group: Consultant		
Cons_Name	Main consultant name	
Cons_Email	Main consultant email address	

Cons_Ph	Main consultant phone number	
Cons_Ph2	Main consultant second phone number	
Cons_MobPh	Main consultant mobile number	
Group: Project		
Proj_No	Project number	
Proj_Desc	Project site description	
Proj_Addr_Phys	Project physical address	**SL**: See above.
Proj_Addr_Del	Project postal address	**SL**: See above.
Proj_Ph_Del	Project delivery phone number	
Proj_Cont_Del	Project delivery contact name	
Proj_AcctNo	Project account number for claims	
Extra_List	Table of project extra values (ValueOnly, NoBorder, Widths) See Project extra data 92 . Only data flagged for display on quotes will be included in the table.	**ValueOnly**: Show only the value column, omitting the name column. **NoBorder**: Omit the table border. **Widths**: Specify the column widths as percentage of the page. Two values, or one value if ValueOnly specified.
Group: Estimate		
Estimate_No	Estimate number	
Estimate_Date	Estimate date	
Estimate_Price_Product	Estimate product price	
Estimate_Price_Dryfit	Estimate dryfit price	
Estimate_Price_Install	Estimate install price	
Estimate_Price_DI	Estimate dryfit + install price	
Estimate_Price_Finishing	Estimate finishing price	
Estimate_Price_DIF	Estimate dryfit + install + finishing price	
Estimate_Price_Total	Estimate total price	
Estimate_Price_Msg	Estimate price annotation	
Estimate_DoorType_Table	Table of prices by door type	**TotalOnly**: Show only the total column, omitting the columns for product, dryfit, install, finishing. **ProductOnly:** Show only the product column, omitting the columns for dryfit, install, finishing. TotalOnly parameter should not be used with this parameter and will be ignored if it is included. **NoBorder**: See above **DoorTypeLongCode:** Forces long codes to be shown on projects using the short code. **Widths**: Specify the column widths as percentage of the page. Two values.

		DoorTypeOnly: Specify the only door types that are to be shown in the table. Multiple values separated by a comma. May be short codes or full description. Case insensitive. If descriptions contain a comma or quote character then use CSV quoting syntax **DoorTypeExclude**: Specify the door types that are not to be shown in the table. Syntax same as DoorTypeOnly. Mutually exclusive with DoorTypeOnly
Estimate_DoorArea_Table	Table of prices by door area	**TotalOnly**: See above **NoBorder**: See above **Widths**: Specify the column widths as percentage of the page. Two values.
Estimate_DoorStage_Table	Table of prices by door stage	**TotalOnly**: See above **NoBorder**: See above **Widths**: Specify the column widths as percentage of the page. Two values.
Estimate_DoorAreaType_Table	Table of prices by area and door type	**TotalOnly**: See above **NoBorder**: See above **DoorTypeLongCode**: Forces long codes to be shown on projects using the short code. **Widths**: Specify the column widths as percentage of the page. Two values.

10.4 Miscellaneous information

10.4.1 Image editor

ProMaster Hardware includes an image editor that allows you to tweak pictures. The image editor is not a drawing tool.

The image editor is used for inventory photos and document images.

Invoking the image editor

There are several ways in which the image editor is invoked:

- After you **load** a picture it is displayed in the image editor.
- After you **acquire** an image from your scanner it is displayed in the image editor.
- After you **paste** an image from the clipboard it is displayed in the image editor.
- After you click an **Edit image** button.

Resize image

When the image editor is loaded as a result of a new image being loaded (load, scanner or paste from clipboard), the size of the image is checked.

If the image dimensions exceed the preferred size pre-set for that image purpose then you are prompted to resize them image. As you will not be allowed to save the image unless it is within the maximum allowed dimensions, then you should proceed with the image resize.

Options are provided to:

- Allow the width and height to be set.
- Quickly set the **Preferred size**.

The status bar at the bottom of the image editor shows you the image dimensions and the image format.

Toolbar options

Option	Description
Editing | Undo	Undo the last change you made to the picture.
Editing | Redo	Reapply the last undo you made to the picture.
Editing | Reload	Undo all changes you have made to the picture, reverting to the picture you started with.
Select | Select all	Selects the whole image
Select | Select none	Removes the selection
Select | Select rectangle tool	Use the mouse to make a selection on the image.
Select | Select ellipse tool	Use the mouse to make a selection on the image.
Select | Select lasso tool	Use the mouse to make a freehand selection on the image.
Select | Select magic wand tool	Use the mouse to make a selection on the image. This tools works best with pictures with clearly defined areas.
Image | Flip horizontal	Flip the picture horizontally.
Image | Flip vertical	Flip the picture vertically.
Image | Rotate left 90	Rotate the picture left by 90 degrees.
Image | Rotate right 90	Rotate the picture right by 90 degrees.
Image | Decrease brightness	Decrease the brightness of the picture.
Image | Increase brightness	Increase the brightness of the picture.
Image | Decrease contrast	Decrease the contrast of the picture.
Image | Increase contrast	Increase the contrast of the picture.
Image | Sharpen	Sharpen the picture.
Image | Blur	Blur the picture.
Image | Crop	Crop the picture, leaving just the area you have selected with your mouse.
Image | Clear selection	Clears the area you have selected with your mouse.
Zoom | Full size	Show the picture at 100% resolution.
Zoom | Fit to screen	Show the picture sized to fit the window.
View | Zoom in	Show the picture larger.
View | Zoom out	Show the picture smaller.

General use

More often than not, the tasks you will be performing in the Image Editor are:

- Crop To Selection (For pictures where you want to remove the surrounding white space)

- Resize (To ensure the picture is the preferred size)

When you have finished your changes, click **OK** to save the picture.

10.4.2 Previewing reports

For many reports you may do a screen preview rather than sending them to your printer. This is useful for checking that the report is producing the results that you expect before you commit to printing it.

Zooming

The buttons provide three zoom settings (Whole page, Zoom to page width, Zoom to 100%) or you may enter a specific zoom value in the edit box. Additionally, the zoom setting can be altered by holding the ctrl key down and using your mouse wheel.

Navigating

For multi-page reports, buttons are available for moving between pages, or use standard keyboard navigation (Ctrl+PgDn, Ctrl+PgUp, Ctrl+Home, Ctrl+End) or the mouse wheel.

Page Layout

Four buttons are available to change the way the pages are presented (Single page, Two pages side-by-side, Continuous and Two pages side-by-side continuous). The side-by-side layouts are useful for seeing two pages at a time on a high resolution display. In the continuous views the mouse wheel scrolls down the page(s) instead of jumping between pages as it does for a single page view.

10.4.3 Sending reports by email

Many reports may be sent by email rather than sending them to your printer.

When reports are sent by email, they are first generated as Adobe PDF files, then sent as attachments on the email.

Where there are options to produce more than one report, then the reports you select may be sent as a single combined PDF, or as individual reports. See Printing a quote 139 for an example of how this is done.

When you send reports by email, the **Email recipients** window is displayed for you to add associates from the project to the email.

- Choose an associate then click **TO**, **CC** or **BCC** according to how you want them to receive the email.
- Repeat to add an many associates as you want.

When you close the **Email recipients** window the email message appears (e.g. in Outlook).

10.4.4 Forgotten admin password

If you have forgotten your admin password, you may reset it by entering your registration code.

Getting Started

- On the main ProMaster Hardware window, select the Environment you are unable to connect to.
- From the **Tools** menu, select the item **Reset Admin password**

Resetting password

Enter your registration code then click **OK.**

If the details are correct then the admin password will be reset to password.

> You should immediately login as **admin** (with password **password**) and then change the password to a secure one.

10.4.5 Unlocking the console

If ProMaster Hardware has been configured in the Application Parameters to lock the console after a time of inactivity, then one of two things will happen.

- If ProMaster Hardware is at the main window, then you will be logged out.
- If you have a window open where you may be performing a task, then ProMaster Hardware locks the console. To unlock the console, the user who is logged in must enter their password, or alternatively, the holder of the admin password may perform an admin unlock.

> The admin unlock is useful for times where the user has disappeared, and the admin wishes to unlock the ProMaster Hardware and log the user out.

ProMaster Hardware version numbers

Part 11

11 ProMaster Hardware version numbers

The following table shows the various file format versions used in each product release version.

Product	Database	Project Export/Import
7.7403.0.0	7019	7000
7.7404.0.0	7019	7000
7.7405.0.0	7019	7000
7.7406.0.0	7019	7000
7.7407.0.0	7019	7000
7.7501.0.0	7019	7000
7.7502.0.0	7020	7000
7.7503.0.0	7020	7000
7.7504.0.0	7020	7000
7.7601.0.0	7021	7001
7.7602.0.0	7021	7001
7.7603.0.0	7021	7001
7.7701.0.0	7022	7001
7.7702.0.0	7022	7001
7.7703.0.0	7022	7001
7.7704.0.0	7022	7001
7.7705.0.0	7022	7001
7.7706.0.0	7022	7001
7.7801.0.0	7022	7001
7.7802.0.0	7022	7001
7.7803.0.0	7022	7001
7.7901.0.0	7022	7001
7.7902.4.0	7023	7001
7.8001.0.0	7024	7001
7.8002.0.0	7024	7001
7.8003.0.0	7025	7001
7.8004.1.0	7025	7001
7.8005.0.0	7025	7001
7.8006.0.0	7025	7001
7.8007.0.0	7025	7001
7.8008.0.0	7025	7001
7.8009.0.0	7025	7001
7.8101.1.0	7026	7001
7.8102.0.0	7026	7001
7.8301.0.0	7026	7001
7.8302.0.0	7026	7001
7.8501.5.0	7028	7001
7.8601.0.0	7028	7001

7.8602.0.0	7028	7001
7.8701.1.0	7029	7001
7.8702.0.0	7030	7001
7.8703.0.0	7031	7001
7.8704.1.0	7031	7001
7.8705.0.0	7031	7001
7.8801.1.0	7031	7001
7.9101.4.0	7034	7002
7.9102.0.0	7034	7002
7.9103.0.0	7034	7002
7.9104.0.0	7034	7002
7.9201.0.0	7035	7002
7.9202.0.0	7035	7002
7.9401.1.0	7035	7002
7.9402.0.0	7035	7002
7.9403.0.0	7035	7002
7.9501.0.0	7035	7002
7.9502.0.0	7036	7002
7.9503.0.0	7037	7002
7.9601.0.0	7037	7002
7.9701.0.0	7037	7002
7.9702.0.0	7037	7002
7.9801.0.0	7037	7002
7.9901.0.0	7037	7002
7.9902.0.0	7037	7002
7.10001.0.0	7037	7002
7.10201.0.0	7038	7002
7.10401.1.0	7039	7002
7.10402.0.0	7040	7002
7.10403.0.0	7040	7002
7.10501.0.0	7040	7002
7.10502.0.0	7040	7002
7.10503.0.0	7041	7002
7.10601.0.0	7041	7002
7.10602.0.0	7042	7002
7.10701.0.0	7043	7002
7.10901.1.0	7043	7002
7.11001.0.0	7043	7002
7.11002.0.0	7043	7002
7.11003.0.0	7043	7002
7.11004.0.0	7043	7002
7.11005.0.0	7043	7002
7.11101.0.0	7043	7002

7.11102.0.0	7043	7002
7.11103.0.0	7043	7002
7.11104.0.0	7043	7002
7.11401.0.0	7043	7002
7.11701.0.0	7043	7002
7.11702.0.0	7043	7002
7.11801.0.0	7043	7002
7.11802.0.0	7043	7002
7.12001.0.0	7043	7002
7.12101.0.0	7043	7002
7.12201.0.0	7043	7002
7.12202.0.0	7043	7002
7.12203.0.0	7043	7002
7.12301.0.0	7044	7002
7.12302.0.0	7045	7002
7.12501.0.0	7045	7002
7.12502.0.0	7045	7002
7.12701.0.0	7045	7002
7.12702.0.0	7045	7002
7.12703.0.0	7046	7002
7.13001.0.0	7046	7002
7.13101.0.0	7046	7002
7.13301.0.0	7046	7002
7.13302.0.0	7046	7002
7.13401.0.0	7046	7002
7.13402.0.0	7046	7002
7.13501.1.0	7046	7002
7.13502.0.0	7046	7002
7.13801.0.0	7046	7002
7.14101.0.0	7046	7002
7.14601.0.0	7046	7002
7.14701.0.0	7046	7002
7.14901.0.0	7046	7002
7.15101.0.0	7046	7002
7.15301.0.0	7047	7002
7.15302.0.0	7047	7002
7.15303.1.0	7047	7002
7.15501.0.0	7047	7002
7.15502.0.0	7047	7002
7.15701.0.0	7047	7002
7.15702.0.0	7047	7002
7.15901.0.0	7047	7002
7.16101.0.0	7047	7002

7.16102.0.0	7047	7002
7.16201.0.0	7047	7002
7.16301.0.0	7047	7002
7.16401.0.0	7047	7002
7.16601.0.0	7047	7002
7.16701.1.0	7047	7002
7.16702.0.0	7047	7002
7.16703.0.0	7047	7002
7.16901.1.0	7047	7002
7.17201.0.0	7047	7002
7.17202.0.0	7047	7002
7.17203.0.0	7047	7002
7.17801.0.0	7047	7002
7.18401.0.0	7047	7002
7.18501.0.0	7047	7002
7.18502.3.0	7047	7002
7.18503.0.0	7047	7002
7.18504.0.0	7047	7002
7.18701.0.0	7047	7002
7.18702.0.0	7047	7002
7.19001.0.0	7047	7002
7.19101.0.0	7047	7002
7.19701.0.0	7047	7002
7.20201.0.0	7047	7002
7.20701.0.0	7047	7002
7.21301.0.0	7047	7002

Summary of changes in ProMaster Hardware updates

Part

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12 Summary of changes in ProMaster Hardware updates

Version 7.21301.0.0

Door search

Added inventory options (Any) and (None) when searching for doors.

Door editing

When you are editing doors, added a button **Save and edit next** to save the current door then open the next door for editing. See the preferences for options for availability and default.

Version 7.20701.0.0

Project duplication

Fixed an issue duplicating a project when all items had been removed from a door in a variation.

Version 7.20201.0.0

Backup

Fixed an issue with backups on the Basic edition.

Version 7.19701.0.0

Reports

Some reports could render door notes incorrectly if the project and door notes were imported from Overture or Opening Studio.

Version 7.19101.0.0

Internet functions

Changed update checking and associated calls to use TLS 1.2

Version 7.19001.0.0

Activation

Premium edition improved license server handling of network errors.

Version 7.18702.0.0

Activation

Activation product improvement on older Windows versions.

System requirements

Updated system requirements, Windows 7 and 8 dropped, Windows 11 and 2022 added.

Version 7.18701.0.0

Activation

Activation improvements to always use https.

Version 7.18504.0.0

Main menu

Fixed an issue with alt-key keyboard short-cuts not showing.

Version 7.18503.0.0

Quote pricing

Fixed missing options when setting quote price percent mark-up/discount.

Version 7.18502.3.0

User interface

Minor improvements.

Version 7.18501.0.0

Doors

Added a "Clear" button to the door search.

Version 7.18401.0.0

Backup program

Replaced the backup program with a newer technology - that used in ProMaster Master-Keying 8. This gives more options.

User interface

Rework of program user interface and new graphics.

Database engine

Updated the database engine to version 2.5.9.

Internal changes

Changes and migration to newer development tools to keep the tool set current.

Exports

Fixed an error on CSV exports for "Door product totals by door type" and "Door product totals" when the project uses inventory short part codes.

Version 7.17801.0.0

Door product matrix export

Added an export for the entire project to produce a CSV matrix of doors and product. Similar to the export from a quote, but unlike the export from quotes which have the quote changes, this export contains everything in the project. To access the export, select the **File** menu the select **Export** then **Export project data (CSV)**.

Version 7.17203.0.0

Customer specific changes

Customer specific changes.

Version 7.17202.0.0

Customer specific changes

Customer specific changes.

Version 7.17201.0.0

Project management data

Added an index to improve performance.

Customer specific changes

Customer specific changes.

Version 7.16901.1.0

Install

Allowed shipment selection when adding items to an install to be any status (previously only complete installs)

Document storage

Added a report showing document storage sizes, particularly of snapshots.

Check for updates

Fixed a rare problem when checking for program updates.

Version 7.16703.0.0

Labels - Shipments, installations and dimensioned product

Installed sample label layouts that can be used for starting a new label layout.

Version 7.16702.0.0

Labels - Shipments, installations and dimensioned product

Allowed custom label sizes on all product licenses without the end-user report license.

Version 7.16701.1.0

Quotes

Added a merge field [Quot_DoorStageType_Table].

Connectivity

Improvements to self-heal when disconnected from database and projects remain locked.

Doors

Added search choices for height, width and thickness.

Added a preference for displaying the door dimensions in the search results.

Project management data

Added an export to the project management data exports. This export includes projects that have been quoted, that you have not won and where all people to whom you quoted have been flagged as losing the job. Essentially this is a list of projects that you may want to review and change the project status to closed or lost.

Version 7.16601.0.0

Door search

Change the default width of some columns in the display and minimum column widths to improve auto-sizing,

Version 7.16401.0.0

Company logo on reports

Fixed the rendering of the full-width logo on reports in landscape. Now the logo correctly stretches to the width of the report in landscape as well as portrait.

Version 7.16301.0.0

Install XML export

Fixed an error exporting install data to XML format.

Projects in progress CSV export

Added columns to the export for claimed costs and also some totals.

Version 7.16201.0.0

Customer specific changes

Customer specific changes.

Version 7.16102.0.0

Performance improvements

Improved the speed of duplicating a project.

Improved the speed of the quote reports "Product schedule", "Compact product schedule" and "Products by supplier for ordering".

Version 7.16101.0.0

Shipments, Quotes, Installs

Altered the presentation of the summary information to avoid information being cropped with some font sizes.

Version 7.15901.0.0

ProMaster Master-Keying 8

Improved the export of data for ProMaster Master-Keying 8.

Version 7.15702.0.0

MAPI Email

For Windows 8 and later changed the way MAPI email is sent to avoid problems from incorrect Outlook settings in the registry.

Version 7.15701.0.0

Customer specific changes

Customer specific changes.

Version 7.15502.0.0

Shipment CSV export

Added another column to each export "IsProjectInventory" so indicate if the part code is global or project specific.

Added column CurrentProductCost containing the current cost (as opposed to that used at quoting time) of global inventory items.

Version 7.15501.0.0

Quote CSV export

Added another column to each export "IsProjectInventory" so indicate if the part code is global or project specific.

Installation reports

Added options to restrict the report to installed items or not-installed items.

Version 7.15303.1.0

Opening Studio import

Resolved an occasional issue creating inventory from an opening studio file.

Version 7.15302.0.0

Internal changes

Changes to make the license server communication more tolerant of network and machine timing.

Changes to check fo temporary folders being deleted by other processes.

Version 7.15301.0.0

Shipments

Added a wizard to take items from a released shipment that are not boxed and put them on to a new shipment. Useful for splitting shipments when the items required for the shipment have not been fulfilled by the manufacturer. Choices are provided for the source shipment, products and doors. Please read the documentation and warning before using this. See Moving items to a new shipment 164.

Version 7.15101.0.0

Export quote doors with prices and costs

Added this new export for quotes.

Shipment packing list worksheet

Added the ability to show the door handing.

Claim detail and claim summary reports

Added an option to not show prices for jobs where unit prices are not disclosed.

Version 7.14901.0.0

Customer specific changes

Customer specific changes.

Project CSV exports

Added 2 exports for project inventory totals.

Version 7.14701.0.0

Export quote margin and value

Added the quote created by, released by and accepted by fields.

Version 7.14601.0.0

Export quote margin and value

Added an export for quote value and margin. Contents largely the same as the equivalent report but this allows manipulation in Excel.

Version 7.14101.0.0

Opening Studio import

This is maintenance feature to support importing projects from Opening Studio.

Backups

Added a step in the auto backup to recalculate index statistics to maintain the optimiser performance.

Version 7.13801.0.0

Quote report

Added the ability to include headers. When you use short part codes the short code header is used, otherwise the inventory type is used.

Spelling

Various spelling error corrected.

Version 7.13502.0.0

Customer specific changes

Customer specific changes.

Version 7.13501.1.0

Customer specific changes

Customer specific changes.

Version 7.13402.0.0

Customer specific changes

Customer specific changes.

Version 7.13401.0.0

Customer specific changes

Customer specific changes.

Version 7.13302.0.0

Inventory supplier

Added an application parameter to allow the supplier to be a mandatory field when entering inventory and project specific inventory.

Project

Clarified the names of some fields.

Lost projects report

Added an annotation after the associate to indicate the project winner..

Version 7.13301.0.0

Internal changes

Changes for future compatibility.

Version 7.13101.0.0

Customer specific changes

Customer specific changes.

Version 7.13001.0.0

Project status import

Added a CSV import for bulking project statuses to Lost/Complete/Cancelled. Requires "admin" login.

Version 7.12703.0.0

Performance improvements

Performance improvement when deleting projects.

Version 7.12702.0.0

Quotes

Increased display width of some fields.

Version 7.12701.0.0

Quotes product csv export

Added options to include the manufacturer part code.

Version 7.12502.0.0

Quotes

Fixed a problem with consultant phone numbers.

Version 7.12501.0.0

Doors

Added an option to show door notes in the "search doors" window.

Version 7.12302.0.0

Customer specific changes

Customer specific changes.

Version 7.12301.0.0

Customer specific changes

Customer specific changes.

Version 7.12203.0.0

Various report

Minor adjustments to column widths for prices.

Version 7.12202.0.0

Various report

Minor adjustments to column widths for prices.

Version 7.12201.0.0

Project export

When exporting a snapshot without activity, there is not the capability to export only a single associate (and thus exclude any other associates from the exported data).

Version 7.12101.0.0

Door prices report

Increased the width of totals.

Version 7.12001.0.0

Rich text

Fixed an issue with inserting jpg images.

Version 7.11801.0.0

Quotes

Fixed an issue with the inventory list not always scrolling correctly. This has necessitated altering the column headings.

Version 7.11801.0.0

Project export/import

Resolved an issue where a cancelled project could not be imported.

Version 7.11702.0.0

Exporting project management data

Added 2 exports, similar to existing exports but with costs so that analysis may be performed on margins etc. The exports are "Projects quoted (Including cost)" and "Projects in progress (Including cost)". Be aware that these make no sense if you calculate quotes from RRP rather than costs and do not have correct cost prices in place.

Version 7.11701.0.0

Quotes

Added parameters to the merge field "Quot_DoorType_Table" to specify the door types that will be included/excluded.

Estimates

Added parameters to the merge field "Estimate_DoorType_Table" to specify the door types that will be included/excluded.

Version 7.11401.0.0

Project inventory

Added the ability to import global inventory into a project using a list of part codes on the Windows clipboard. This is available while creating a project and also when editing the inventory for a project.

Version 7.11104.0.0

End user report writer

Enhancements for the end user report writer feature.

Version 7.11103.0.0

Customer specific changes

Customer specific changes.

Version 7.11102.0.0

Customer specific changes

Customer specific changes.

Reports

Minor fix relating to loading company graphic.

Version 7.11101.0.0

Customer specific changes

Customer specific changes.

Version 7.11005.0.0

End use report writer

Enhancements for the end user report writer feature.

Version 7.11004.0.0

Customer specific changes

Customer specific changes.

Version 7.11003.0.0

PDF

Resolved a problem with generating some reports s PDF files.

Version 7.11002.0.0

Shipments

Added two application parameters to determine if "date ordered" and "date expected" are mandatory when creating a shipment.

Version 7.11001.0.0

Shipments

Date fields were displaying a default data even when the value was blank. Fixed.

Version 7.10901.1.0

Internal changes

Changes for future compatibility.

Claim export

Added an export that exports all claimed items from all released claims. See Exporting all claimed items to a csv file 179.

Version 7.10701.0.0

Customer specific changes

Customer specific changes.

Version 7.10602.0.0

Project associates

Added a "lost" flag so that you may record if an associate has lost the job prior to knowing who won the job (and therefore you have no interest in pursuing that associate).

Version 7.10601.0.0

Project import

Resolved an issue where rules generated during import from another ProMaster Hardware user where not always respected.

Version 7.10503.0.0

Quote cost and price import

Added a wizard to import costs and prices into quotes.

Version 7.10502.0.0

Quote export

Changed the "Exporting products and prices to a csv file" to include dryfit, install and finishing according to the project settings.

Associate contacts

Resolved and error when removing associate contacts.

Customer specific changes

Customer specific changes.

Version 7.10501.0.0

Windows versions

Added support for Windows 10.

Dropped support for Windows XP and Windows Server 2003. ProMaster Hardware will continue to operate on these retired operating systems for some time but are not officially supported.

Door area duplicate

Fixed error message when pressing down then up while entering door number prefix to change.

Updated door area drop down list after duplicating door area to include the new door area.

Version 7.10403.0.0

Project import

Resolved an error condition.

Version 7.10402.0.0

Installs

Added a wizard to take items from a released install that are not completed and put them on to a new install. Useful for splitting installs when the workload needs to be shared or for terminating the work of an installer and giving it to a new installer. Choices are provided for the source installation, products and doors. Please read the documentation and warning before using this. See Moving items onto a new install 173 .

Version 7.10401.1.0

Quote reports

Added the ability to print door notes on the "Door variation changes and prices" report.

Project

Added a button the main toolbar to open the "project modify" window and take you directly to edit notes.

Project status

Records who changed the project status to lost/complete/cancelled. The person who made the change can be seen on the information tab of the "project modify" window.

Project status report

Fixed a relative rare anomaly whereby with some combinations of data a blank page would be inserted after the first page of the report.

Customer specific changes

Customer specific changes.

Quotes

On quotes for variations, a star graphic appears against any items that have not appeared on the main contract or a quote for an earlier variation to indicate that it is new item with new pricing.

Doors

Added the ability to search for doors having inventory activity (added or removed) in a particular variation. See the documentation on searching for doors for clarity.

Version 7.10201.0.0

Project

Displayed associate contact title on the associates tab.

Project associates

Added a "won" flag so that you may record the associate who has won the job prior to knowing if you have won the job from them or not.

Added the ability to record who the QS is and who the PQS is. These annotations are shown on the main screen project information and is useful particularly in the interval between the associate winning the contract and you being awarded the contract so that you know with whom to communicate.

Project retentions

Previous capability to store retention percentages and calculate these on a claim was inadequate for purpose. Several fields have been added to the project and correspondingly merge fields have been added to claims. Some claim fields (e.g. retention rates) have been removed as they are no longer applicable.

Customer specific changes

Customer specific changes.

Version 7.10001.0.0

Customer specific changes

Customer specific changes.

Version 7.9902.0.0

Associate import (CSV)

Fixed an error message that had crept appeared in a recent release.

Version 7.9901.0.0

Door rename import (CSV)

Added a csv import that allows doors to be renames. Exercise caution!

Version 7.9801.0.0

Project inventory sets

Allowed project inventory to me altered (including adding and adding from global inventory) while selecting inventory items for the project inventory set.

Door import (CSV)

Enhanced the import to allow associated data (Handing, Door type, Door finish, Frame type, Frame finish, Project inventory set) to be edited during the import/remapping process.

Keying matrix

Fixed some row and column highlight issues that crept in with the appearance change in version 7.9601.

Version 7.9702.0.0

Quote value and margin report

Improved the report to accommodate quotes where costs are missing.

Version 7.9701.0.0

Project status

Added the ability to record the "finalised" date when changing the status to lost, cancelled or complete.

Lost projects report

Added a choice for reporting based on the date lost or the date quoted.

Quote value and margin report

Added a choice to print the report with product only "Quote product value and margin" or to include dryfit, install and finishing "Quote value and margin".

Main screen project information

Changed associate display to exclude any associates that are used on a rejected quote and are not used elsewhere (non-rejected quotes, estimates, installs, claims).

Version 7.9601.0.0

Shipments

Added an option to see activity for the selected door on a shipment.

Installs

Added an option to see activity for the selected door on an install.

Mouse

Resolved some issues with mouse scrolling.

Appearance

Updated the application appearance to a cleaner crisper look.

Version 7.9503.0.0

Door csv import

Added the ability to import a project inventory set for each door. If the door has no items on it (either a new door or an existing door with no items) then the contents of the set will be applied to the door.

Version 7.9502.0.0

Installations

Automatically records the date when a dryfit or install item is marked as complete. Displays on the installation windows and is available for users with the custom report writer module.

Version 7.9501.0.0

Project duplicate

Added an option to control the project creation date on the new project.

Version 7.9403.0.0

Project import

Fixed a permissions related issue.

Version 7.9402.0.0

Installs

Performance improvements when opening installs to record completed items.

Version 7.9401.1.0

Project export

Added an option to exclude project inventory prices when exporting a project snapshot (i.e. no activity). This allows manufacturers write schedules without quoting the project and additionally not be concerned with keeping inventory prices (which propagate to project inventory) current.

Quotes

Improved the way costs and retail prices are selected for a quote to allow consider inventory prices where there is a retail price but the cost is blank (previously it was required to be zero).

Version 7.9202.0.0

Project snapshots

Set the "All users may open" permission on the new project to be the same as the project being copied.

Project duplicate

Set the "All users may open" permission on the new project to be the same as the project being copied instead of using the default defined in the application parameters.

Project CSV export

Added an export for projects that shows inventory and the quantity quoted and the quantity shipped.

Quotes

Added a merge field [Quot_DoorStageArea_Table].

Import / export

Fixed a rare project export/import problem.

Request for information

Added the ability to attach documents when emailing the RFI.

Version 7.9201.0.0

Quotes

Performance improvements when opening quotes.

Installs

Performance improvements when opening installs.

Version 7.9104.0.0

Project management CSV export

Enhancements for additional data exported.

Version 7.9103.0.0

Doors bulk change

Added the ability to bulk change properties on doors when a variation is not active. This is now consistent with editing a single door and with the CSV import functionality.

Project inventory

Fixed a permissions related issue.

Project management CSV export

Added some csv exports of project management data.

Version 7.9102.0.0

Import / export

Resolved an error related to importing projects with documents.

Version 7.9101.4.0

Partial Quotes

Added functionality to support partial quotes. This is a separate licensed feature available for the premium edition.

Quotes

Added a description field on quotes where you may place a brief description of the quote to help differentiate between quotes.

Request for information

Added the ability to record requests for information.

Bulk change door inventory

Added the ability to search the list of doors.

Bulk change door installation and finishing

Added the ability to search the list of doors.

Reinstate door

Added an option to reinstate the inventory as it was when the door was removed.

Project inventory

Added functions to (a) duplicate a project specific inventory item to create a new one and (b) duplicate a global inventory item to make a project specific inventory item.

Project import/export

This version required a change to the import/export format to support new functionality.

Error messages

Resolved error messages in several areas that would appear when saving incomplete data.

Version 7.8801.1.0

Communications

Added templates and paragraphs for the communication body (like is available for quotes etc).

Version 7.8705.0.0

Claims

Added the capability to print the price as well as the cost on the "Claim install costs" report and added sub totals by installer.

Version 7.8704.1.0

Finishing

Fixed an error message that some customers would see when entering finishing dimensions.

Customer specific changes

Customer specific changes.

Version 7.8703.0.0

Quote summary report

Added the variation authorisation number to the un-costed version of this report so the variation numbers are meaningful when you give the report to your project QS.

Installs

Added an option to remove an item from the installation request for all doors.

Project

To make the process of repeatedly editing project notes faster when working within a project, the project window now remembers if you last used the notes tab, and on re-entering the project windows and if notes was the last thing used previously then the notes tab is selected ready for note editing.

Doors

Fixed a problem sorting doors that crept in a few versions ago.

Version 7.8702.0.0

Text editor

Resolved an issue where inserting some types of graphics into the test editor would produce an unreadable result.

Version 7.8701.1.0

Projects needing claim report

Added "contract value" and "last claim" columns to the report.

Rich text editing

Improved tab key handling so that Ctrl-Tab may now be used to move between tab sheets but Tab alone is still used by the editor (e.g. for moving between tab stops of moving around in a table).

Shipments, Installs, Claims

Altered the way the lists of shipments, installs and claims sort to improve the chronological display.

Error messages

Tidied up some error messages.

Project inventory sets

Fixed an error when adding a project specific inventory item to a project inventory set when the item did not have a picture.

Communications

Fixed an error when storing a communication from an emailed quote when the project has a long description.

Project inventory

It is possible to bring global prices into the project inventory when importing global inventory items. This capability is turned on by an application parameter for those who want it. Prices will be imported for product, dryfit if it is on for the project and install if it is on for the project. If a standard markup is specified for the product, it will be used to calculate the sell price otherwise the setting for the default markup/discount will be applied. Any items marked "get price each time this product is used" will not bring the global price into your project inventory.

Inventory

Added a CSV import for changing part codes. Use caution - part code changes are reflected in all projects - current and past.

Version 7.8602.0.0

Customer specific changes

Customer specific changes.

Version 7.8601.0.0

Font sizes

Resolved a problem that crept in with an updated rich text control in the previous version where font sizes were not set correctly for rich text controls when using the drop down list of sizes. The Increase/decrease buttons and the font selection dialog did not exhibit the same problem.

Version 7.8501.5.0

Installations

When recording installation complete, the list of items now includes the door description.

Doors - Notes

Added an option in preferences to determine if you will be prompted when copying a door and the door notes to create a new door.

Doors - Lock function

Added a new type or data on doors "Lock function". Lock function setup, defaults, CSV import etc are substantially similar to other door data types (door type, door finish, frame type etc).

Lock function is included in CSV exports and may be used as door search criteria.

Doors - display preferences

Added an option in preferences to determine which columns are returned in the search, and door finish/frame type/ frame finish/lock function/rating may now be shown.

Doors - searching

The ability to search for doors by "Extra info" name has been added.

Improved the fresh of area and stage drop down lists when changes are made in doors or in the bulk change.

Estimates

Improved application of an estimate so that quotes pick up corresponding estimate prices in preference to other prices where possible. Note that if two or more estimates are applied in the same variation (highly unlikely) and have the same item at different prices you must handle this situation yourself.

Shipments

Altered the way permissions work so that returning a shipment to entry from the packaging status is permitted to users with permissions to create shipments but returning to data entry stage from the shipped status still requires the permission to return a shipment to data entry.

Version 7.8302.0.0

Installs

Fixed icons not displaying for communications and documents associated with installs.

Install reports

Added a variant of the QA report with additional space to record certification information.

Version 7.8301.0.0

Quotes

Performance improvement on quote variation report.

Customer specific changes

Customer specific changes.

Version 7.8102.0.0

Quotes

Fixed an issue when duplicating quotes with alternatives where the total was not updated immediately.

Doors

Added the ability to edit inventory sets while editing a door in the same manner that door types and frame types could be edited.

Version 7.8101.1.0

Doors

Added more granular search capability for doors marked as keyed, and with or without keys.

Quotes

Improved the "quote door product matrix CSV export".

Version 7.8009.0.0

Quotes

Allowed negative percentages to be entered (thus allowing prices below cost if mark-up and sale above retail if discount). Previously it was necessary to enter the sale price and have the negative percentage computed.

Version 7.8008.0.0

Estimates

Performance improvements when reporting.

Version 7.8007.0.0

Licensing

Worked around a problem with a Windows anomaly.

Version 7.8006.0.0

Reporting

Various reports improved "keep together" - particularly for door related reports.

Version 7.8005.0.0

End user reporting

Resolved a problem running reports for claims.

Version 7.8004.1.0

Licensing

Improved licensing engine to be more tolerant of changing user licenses in busy installations.

Version 7.8003.0.0

Project export

Added an application parameter "Allow cost prices to be exported with project" which may be changed by the admin user to prohibit the export of costs with projects.

Finishing

Removed a limitation on flagging negative finishing (item required finishing then finishing was removed or reduced).

Version 7.8002.0.0

Estimates

Stopped variation type being altered after a quote was created.

Communications

Resolved an error message when recording communications when emailing a quote.

Version 7.8001.0.0

Quotes

Improved the way costs and retail prices are selected for a quote to allow the selection of project inventory prices with a retail price but no cost and with price calculated as a discount from retail.

Version 7.7902.4.0

CSV exports

Resolved a problem when exporting CSV data for quotes, shipments and claims where the file names were not correct.

End user reporting

Resolved a problem making reports for claims.

Quote CSV export of doors and inventory

Improve the aggregation of data to remove unnecessary rows.

Installation labels

Added label size 90 mm wide by 30 mm high for both types of installation labels. This size is suitable for affixing on the hinge.

Shipment packaging

Added another packaging function "Put all unboxed of selected item in this box". This can be useful for packaging items such as hinges where for example a box may contain all hinges of various types.

Quote reports and claim reports

Several reports were not marked as "Proof" when the quote or claim was in the "Entering" state. Fixed.

Version 7.7901.0.0

Keying matrix

Fixed an error message that occurred sometimes when saving.

Merged documents (Quotes, claims etc)

Identified and resolved a problem where large documents would not save correctly after being merged, thereby producing corrupt printouts of the cover documents for quotes, installs, shipments and claims. Generally this would not affect users as the limit where the problem occurred was quite high. If this has affected a quote etc, simply open then save the quote after installing this update and the merged document will be re-saved correctly.

Version 7.7803.0.0

Quotes

Added a parameter to the [Quot_DoorType_Table] and [Quot_DoorAreaType_Table] merge fields "DoorTypeLongCode" to force the display of the long code even on projects with short code in use.

Installation labels

Added an application parameter to control if the installer displayed on the labels is the installer's name and company name or just the installer's name. This affects only standard labels, not those designed by licensees of the end user reporting module.

Reports

Added some settings in the user preferences to allow some control over the widths of various columns on reports. Separate settings are provided for short codes and long codes. This affects only standard reports, not those designed by licensees of the end user reporting module.

Version 7.7802.0.0

Associate contact CSV import

Fixed a problem that stopped some associate contacts from being imported.

CSV imports

Added CSV imports for project data for Handing, Door Type, Door Finish, Frame Type, Frame Finish.

Project inventory

Added a function that removes from the project any project inventory items that are unreferenced. I.e. They do not appear on any doors, quotes, shipments etc. This can be used for cleaning up a project where unnecessary items have been added. Exercise caution is using this function - if you are setting up a project and have not used the items ion doors, they can all too easily be removed.

Version 7.7801.0.0

Reports

Improved the file names generated for PDF attachments when emailing reports to include the quotation number, claim number, shipment number, install number or project number for easier identification.

Emailing reports

Improved the email subject generated when emailing reports to include project number and description and where applicable the quotation number, claim number, shipment number or install number.

Version 7.7706.0.0

Quotes

Fixed an error on the quote merge field for alternatives.

Version 7.7705.0.0

Claims

Added a two merge fields to show claim amounts by area an by stage.

Version 7.7704.0.0

Shipments

Resolved an issue the shipment csv export omitted some items when the item was quoted on a variation having net quantity zero of that item.

Version 7.7703.0.0

Claims

Resolved an issue where some values for amount paid and amount retained were not saved correctly.

Version 7.7702.0.0

Reports

Resolved an issue that prohibited full width logo display on some installations.

Customer specific changes

Customer specific changes.

Version 7.7701.0.0

Projects needing claim report

Resolved an error that occurred when running the report for a single consultant.

Customer specific changes

Customer specific changes.

Version 7.7603.0.0

Claims

Altered the calculation for claim fields that include the recorded amount paid and amount retained to be consistent with the time span included for other "previous amount" calculations.

Claims

Resolved an issue where some values for amount paid and amount retained were not permitted.

Customer specific changes

Customer specific changes.

Version 7.7602.0.0

Project inventory

Added an automatic sorter to allow the project inventory to be sorted according to the order you have defined for your inventory types then by the part code.

Shipment door labels

Improved the generation of shipment door labels when only some items have been assigned to boxes.

Version 7.7601.0.0

Claims

Added capability to record if the claim is the final claim (This is then available as a merge field).

Added capability to record amount paid and amount retained (These are then available in several merge fields).

Added a number of merge fields to allow greater control over the claim document.

Shipments

Added a report "Door list with products". Particularly useful for printing doors on negative and nil quantity shipments.

Bulk change door inventory

Resolved an issue that prohibited install-only items from being added in some circumstances.

Version 7.7504.0.0

Quotes

Added a parameter to the [Quot_DoorType_Table] merge field "ProductOnly" to allow the table to display only product prices, thereby allowing install prices to be shown as a separate total only.

Quotes

Added merge fields [Quot_Price_DI] and [Quot_Price_DIF].

Version 7.7503.0.0

Quotes

Important performance optimisation when creating or loading quotes for large projects.

Version 7.7502.0.0

Shipment CSV export

Improvements to the data exported.

Doors

Performance optimisation when adding doors.

Version 7.7501.0.0

Customer specific changes

Customer specific changes.

Preferences

Fixed a problem saving SMTP email settings.

Shipment packaging

Improved the scrolling of choices when screen size is small.

Documents

Fixed the date and time recorded when a quote was emailed then the communication recorded.

Installations

When marking installations as complete, enhanced the craphics in the list to make identification of complete and incomplete items easier.

Version 7.7407.0.0

Door and inventory sorting

Removed the requirement to have an active variation on a project for the doors or inventory to be sorted.

Shipments

Improved the logic for selecting items to add to negative or nil-quantity installs.

Inventory selection

Improved the way inventory items are sorted for on-screen selection lists.

Version 7.7406.0.0

Shipment CSV export

Fixes an inaccuracy in the CSV export that occurred occasionally.

Shipment packaging

Added a new packaging option for putting an item in the same box as a "ship separate" item that has already been packaged.

Install quality assurance form

Added an option to print on the report any existing installer notes.

Version 7.7405.0.0

Quote numbering

Improved the way quote, shipment, install and claim numbers are generated.

Project notes

Added templates and paragraphs for project notes (like is available for quotes etc). This way you may define a project notes paragraph which you may bring into a project's notes.

Pre-installation site survey report

Added another variant of doors report for the purpose of preforming a site survey prior to commencing installation.

Version 7.7404.0.0

CSV exports

Improved the naming of various project related CSV exports to include project number, quote number, shipment number and claim number as appropriate.

Version 7.7403.0.0

Initial release of ProMaster Hardware 7.