



## Updating a Price List in Fabrication ESTmep

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### FB6040

This class covers the use of price lists and pricing services to update pricing within Fabrication ESTmep. We will cover Harrison Pricing Service to update existing price list. We will examine the Product Information Editor, ID Codes and how pricing information is linked to items in ESTmep. We will also touch on some best practices, limitations and advantages. We'll show you an example of how to access the Harrison Price list and import it into ESTmep to update pricing.

### Learning Objectives

At the end of this class, you will be able to:

- Access and download content from [www.building3dcontent.com](http://www.building3dcontent.com).
- Access and download content within Fabrication ESTmep.
- Understand how to import a Service.
- Understand how to view and modify the Product Information Editor.
- Understand how to modify and update a price list.
- Modify and customize the Item and Item Folder viewer.
- Understand how to change the price list on multiple items.
- Understand how to navigate through E-Office and download the Harrison Pricing update.
- Understand how to navigate through CINX and download the Harrison Pricing update.

## About the Speaker



## Lyle Janda

Technical Advisor, Enceptia

*Lyle Janda is a technical advisor at Enceptia for the Autodesk Fabrication products. He has extensive experiencing in installing, training and supporting CADmep, ESTmep, FABmep, CAMduct, Tracker and RemoteEntry. Lyle previously worked as a designer and drafter for an MEP contractor. He has contributed significantly towards the creation of the Enceptia Configuration pack for the US market and our courseware and training materials creation efforts. Lyle is also involved with Enceptia's go-to-market strategy for a best known practices knowledgebase for the Autodesk Fabrication Solutions.*

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## Greg Murphy

BIM Technology & Support, Murphy Company

*Greg Murphy is currently working at Murphy Company, a \$200m+ St. Louis, MO Design Build Mechanical Contractor, as Supervisor – BIM Technology & Support. He has over 30yrs of experience in the Mechanical Contracting Industry with extensive experience in estimating and detailing for mechanical piping, sheet metal and process piping. Greg has trained Autodesk Fabrication ESTmep as well as other software packages. He attended Louisburg Junior College in Louisburg, NC for computer science and also attended Wake Technical Community College in Raleigh, NC for mechanical engineering technology. Greg enjoys helping others get the most out of their Integrated Fabrication Solutions.*

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## Downloading Content

To have access to the new Harrison Pricing codes linked to the ADSK codes, you must download the 2015 version of Fabrication CADmep, ESTmep or CAMduct.

### Building 3D Content ([www.building3dcontent.com](http://www.building3dcontent.com))

Building 3D content is a website controlled by Autodesk and is being updated with new items. When new items are added to the website, you will have access to download them into your Fabrication Database.

1. Navigate through the website.
  - List View
  - Advance Search
  - Gallery View
  - Search by manufacture
2. Download Charlotte No Hub Fittings
  - Rename and save the Zip file.
3. Discussion Forum
  - This is the primary site for all content related issues.
  - Autodesk Fabrication Team monitors and controls this site.

**Tips:** Search Autodesk Fabrication Content (<http://aec-projects.com/autodesk-fabrication/search-itm-content/>)

### Downloading Building 3D Content directly into Fabrication ESTmep

To have the ability to download content directly into Fabrication ESTmep, you must be using Fabrication ESTmep 2014 SP2 or newer.

1. Click on the Help menu and select Download Content.
2. Navigate through the Autodesk Fabrication Content Solution
  - Filter by Manufacturer
  - Imperial, Metric, Both
  - Keywords
3. Download Charlotte No Hub Fittings
  - Add the Charlotte Fittings to the download list.
  - Download directly into Fabrication ESTmep.
  - Access and download the Mapprod entries

**Tips:** Watch a video on downloading content (<http://enceptia.com/downloadcontent/>)

## Navigating through Fabrication ESTmep

### Importing the Service (IEZ file)

When downloading content from the Building 3D Content website, you will need to import the service using the IEZ file provided in the download.

1. Click Takeoff ➤ Services ➤ Import.
2. Browse to the downloaded IEZ file and select Open.
3. In the Import Services dialog box, check the appropriate services and select Import:
  - Click through the remaining dialog boxes to import the service.
4. This service is strictly for importing items into the database, you will need to add these items into a service template for proper use

### Item Takeoff

There are many different ways to add items into a job. In this exercise, you will learn how to use the quick entry method, add items from the Item Folders, and customize the item takeoff screen.

5. Customize headers within the Item tab.
6. Cost breakdown
7. Item Properties
  - Item Tab>Code (ADSK..)
  - Costing Tab
  - M-Rate Hyper Link
8. Harrison codes are not linked to the ADSK code until they are added to the Product Information Editor.

## Product Information Editor (Mappord)

### Show Information

The Show Information tab is used to store all of the product information and ADSK ID codes. This information is most commonly used when creating reports. When downloading content, this information is automatically inserted inside the Product Information Editor but can be manually added as well.

1. Use the drop down menus to create filters.
2. Use the Edit tab to manipulate the data.
3. The Green new button located at the bottom is used to paste information from excel.

## Show Suppliers

The Show Suppliers tab is used to add the supplier code and link it to the ADSK ID code. By default the UPC Code, Manufacture ID, OEM Code and Harrison Code are included. New suppliers can be added or deleted.

1. The Supplier data can be modified similar to the Product Information.
  - The Green New button is used to import excel information.
  - If subscribed to the Harrison Publishing House, they will send you a pricing update that will use these same codes.
  - This information can also be used in reports.
2. The Supplier data will need to be imported separately when downloading content.

## Open CSV file from the Content Download

When downloading content from the Building 3D Content website, you will need to import the Mapproid information along with the Supplier Information from the CSV file provided in the download.

1. The Product Information will be ID-Finish.
  - This information will need to be copied into the Show Information tab.
2. The Supplier Information will be Manufacture-UPC Code
  - This information will need to be copied to the Supplier Information tab.

## Table Builder

Table Builder is an excel spreadsheet that is used to help manage the Product Information and Supplier Information. This excel spreadsheet helps speed up the process of importing the information into the Product Information Editor.

1. From the CSV file, copy the Product Information first making sure to include the headers.
  - Using the New Button located at the bottom of the list, right click and paste the Product Information from the CSV file into the Table Builder.
  - Enable Data Contains Field Names
2. From the CSV file, copy the Supplier Information, making sure to include the headers.
  - Using the same method as before, paste the Supplier Information using the New button.
  - Use the Find function and the ADSK ID to verify the import was successful.

## Updating Pricing List

There are multiple ways to update a price list in the Fabrication ESTmep database. This exercise will cover how to download a price list update using the Harrison Publishing House Service and import the CSV file within the program.

### Database Costing Overview

The Costing portion of the Database is used to setup and maintain the Price List, Fabrication Times, Installation Times, Labor Rates and other costing information. For this exercise, we will focus on the Product Code based Price Lists. .

1. Open the Database and select the Costing tab ➤ Price List. Here is an overview of what makes up the price list.
  - **Supplier Group:** Name of the Supplier wanting to be displayed and categorized in Estimate Summary. Used to group price lists together from the same supplier ensuring the summaries/reports isolate the cost of each supplier across multiple price list.
  - **Carriage:** Additional Nett cost added to the price. Example: Used for a transportation percentage from the Supplier to site if there were charges for delivery.
  - **Material Overheads:** extra supplier based percentage mark up for inclusion into Gross cost calculations.
  - **Price List:** Name of the Price list contained within the Supplier group. This is the table name assigned to the M-Rate field of each item.
  - **Generic Name:** Used for grouping price lists that contain the same product codes but from an alternative supplier.
  - **Setup Discounts:** Discounts are available for assignment to each code in the price list. You can assign a discount code to each of the product codes in the price list. The calculation can be a percentage decrease/increase or by a factory/multiplier.
2. The header information can be customized to show the Product Information and Supplier Information.
  - Right click on the header and select Customize Product Info.

### E-Office Overview

Harrison Publishing House is a full-time content provider and pricing service for the Plumbing/Mechanical and Electrical trades. E-Office is a comprehensive product to assist contractors in harnessing the power of the internet to more efficiently manage the necessary office functions of the modern contractor.

1. General Navigation
2. Export CSV file.



### CINX Overview

CINX is a new web-based tool that is used to request and download pricing updates from Harrison Publishing House

1. General navigation.
  - Custom download
  - Search by download
2. Export CSV file.

### Item Folder Overview

The Item Folders can be used to add a new price list or change a price list to multiple items. When changing the price list at the Item Folder level, this will be a global change throughout the program. Any new items taken off from a service, will reflect the new price list change.

1. Changing the view to Details, shows the Item Properties information.
  - Right click on the header and select Customize to change the header information.
  - Select multiple items, right click and select Properties. The Multiple Item Properties dialog appears. Changing the price list here, will update the items in the services.
  - The Multiple Item Properties dialog can be customized in the Database ► Takeoff ► Item Entry ► Multiple Item Properties.
2. Once the price list has been changed at the Item Folder level, you will need to update any items in the job.
  - Select the Item tab.
  - Select multiple items, right click and select Properties. The Multiple Item Properties dialog appears. Changing the price list here, will update the items and the pricing within the job.
  - Any new item added to job will reflect the change made in the Item Folders.

### Discussion

- Sheet metal: Round Bought Out
- Install Times
- Ancillaries
- Using a different supplier
- Best practices

## Resources

- Enceptia ([www.Enceptia.com](http://www.Enceptia.com))
- Enceptia Blog (<http://enceptia.com/fabrication-blog/>)
- XtraCAD ([www.XtraCAD.com/](http://www.XtraCAD.com/))
- Building 3D Content ([www.building3dcontent.com/](http://www.building3dcontent.com/))
- Autodesk Fabrication Search .ITM Content (<http://aec-projects.com/autodesk-fabrication/search-itm-content/>)
- Autodesk Fabrication Idea Station (<http://forums.autodesk.com/t5/fabrication-ideastation/idb-p/1220/>)
- Autodesk Fabrication Content Discussion Forum (<http://forums.autodesk.com/t5/fabrication-contentn/bd-p/168/>)