



# AUTODESK UNIVERSITY 2015

MSF11336

## Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

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### Learning Objectives

- Learn how to upload your Fabrication database to CINX
- Learn how to configure the Fabrication-to-CINX connection and defaults
- Learn how to select the best material price type to use in Fabrication updates
- Learn how to apply a price update and notifying other users of the changes

### Description

This class will cover how to simplify the complexities of material pricing using a new add-in for the Autodesk, Inc., Fabrication software products. The CINX (Construction Information Network and Exchange) add-in uses the Fabrication software API to provide new capabilities for contractors to align the pricing throughout their organizations and with their wholesale distributors.

### Your AU Experts

*Josh Asche is currently working at Comfort Systems USA, Inc., as a Building Information Modeling (BIM) integration specialist. Comfort Systems USA (CSUSA) has become America's leader in installation and service for building mechanical systems and currently has 36 subsidiary companies with over 96 locations across the United States. CSUSA has a total of 23 companies and 6 sheet metal fabrication shops with 154 users sharing the same Fabrication software database. Josh is responsible for implementation, training, and advisement on best practices for these companies, developing standards within the organization, and continuing to utilize new technology to the fullest extent. Before working at CSUSA, Josh was a sheet metal worker for 12 years; MAP software trainer for 3 years; and regional sales manager for Technical Sales International, LLC, for 2 years. Josh has been working with Autodesk, Inc., products for 15 years.*

# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

*William is currently working at Comfort Systems USA, a Premier Mechanical Systems Installation and Service provider, as BIM Trainer and Product Specialist. CSUSA is a national organization with 23 companies, 6 Sheet Metal Fabrication Shops and 154 users currently sharing the Autodesk Fabrication Products with one database. William is responsible for implementing, training, and advising on best practices for these companies, developing standards within the organization, and providing technology recommendations for the future. In the past, William has trained and Implemented Autodesk Fabrication CADmep, ESTmep, and CAMduct as well as utilized it as a 3D detailing and coordination package. William has been using Autodesk Products for 28 years. William enjoys helping others utilize the software to its fullest extent.*



# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

## Learn how to upload your Fabrication database to CINX

This is the first step in getting your database ready to be used with CINX. The user must determine what items in their database they would like to be able to manage with CINX. This information will need to be then need to be exported to an Excel document. This can be achieved easiest via Scripting or Mapprod. See Figure 1 below. Some of the information you will want to include is:

- ID Code
- HPH Code
- BDID Code
- Manufacturer Name (Mapprod)
- Product (Mapprod)
- Description (Mapprod)
- Size (Mapprod)
- Material Name (Mapprod)
- Specification (Mapprod)
- Install Type (Mapprod)

Translation English											
Id	Group	Manufacturer	Product	Description	Size	Material	Specification	Install Type	Source Description	Range	Finish
ADSK_40000271	DWV	Charlotte	No.SV43	NoSV43 - Sanitary Tee	4"	Cast Iron	ASTM A74	Solvent Welded	NoSV43 - Sanitary Tee	Service Weight	No Finish
ADSK_40000272	DWV	Charlotte	No.SV43	NoSV43 - Sanitary Tee	5"x5"x4"	Cast Iron	ASTM A74	Solvent Welded	NoSV43 - Sanitary Tee	Service Weight	No Finish
ADSK_40000273	DWV	Charlotte	No.SV43	NoSV43 - Sanitary Tee	5"	Cast Iron	ASTM A74	Solvent Welded	NoSV43 - Sanitary Tee	Service Weight	No Finish
ADSK_40000274	DWV	Charlotte	No.SV43	NoSV43 - Sanitary Tee	6"x6"x2"	Cast Iron	ASTM A74	Solvent Welded	NoSV43 - Sanitary Tee	Service Weight	No Finish
ADSK_40000275	DWV	Charlotte	No.SV43	NoSV43 - Sanitary Tee	6"x6"x3"	Cast Iron	ASTM A74	Solvent Welded	NoSV43 - Sanitary Tee	Service Weight	No Finish
ADSK_40000276	DWV	Charlotte	No.SV43	NoSV43 - Sanitary Tee	6"x6"x4"	Cast Iron	ASTM A74	Solvent Welded	NoSV43 - Sanitary Tee	Service Weight	No Finish
ADSK_40000277	DWV	Charlotte	No.SV43	NoSV43 - Sanitary Tee	6"	Cast Iron	ASTM A74	Solvent Welded	NoSV43 - Sanitary Tee	Service Weight	No Finish
ADSK_40000278	DWV	Charlotte	No.SV43	NoSV43 - Sanitary Tee	8"x8"x4"	Cast Iron	ASTM A74	Solvent Welded	NoSV43 - Sanitary Tee	Service Weight	No Finish
ADSK_40000279	DWV	Charlotte	No.SV43	NoSV43 - Sanitary Tee	8"x8"x6"	Cast Iron	ASTM A74	Solvent Welded	NoSV43 - Sanitary Tee	Service Weight	No Finish
ADSK_40000280	DWV	Charlotte	No.SV43	NoSV43 - Sanitary Tee	8"	Cast Iron	ASTM A74	Solvent Welded	NoSV43 - Sanitary Tee	Service Weight	No Finish
ADSK_40000281	DWV	Charlotte	No.SV43	NoSV43 - Sanitary Tee	10"x10"x4"	Cast Iron	ASTM A74	Solvent Welded	NoSV43 - Sanitary Tee	Service Weight	No Finish
ADSK_40000282	DWV	Charlotte	No.SV43	NoSV43 - Sanitary Tee	10"x10"x6"	Cast Iron	ASTM A74	Solvent Welded	NoSV43 - Sanitary Tee	Service Weight	No Finish
ADSK_40000283	DWV	Charlotte	No.SV43	NoSV43 - Sanitary Tee	10"x10"x8"	Cast Iron	ASTM A74	Solvent Welded	NoSV43 - Sanitary Tee	Service Weight	No Finish
ADSK_40000284	DWV	Charlotte	No.SV43	NoSV43 - Sanitary Tee	10"	Cast Iron	ASTM A74	Solvent Welded	NoSV43 - Sanitary Tee	Service Weight	No Finish
ADSK_40000285	DWV	Charlotte	No.SV43	NoSV43 - Sanitary Tee	12"x12"x6"	Cast Iron	ASTM A74	Solvent Welded	NoSV43 - Sanitary Tee	Service Weight	No Finish
ADSK_40000286	DWV	Charlotte	No.SV43	NoSV43 - Sanitary Tee	12"x12"x8"	Cast Iron	ASTM A74	Solvent Welded	NoSV43 - Sanitary Tee	Service Weight	No Finish
ADSK_40000287	DWV	Charlotte	No.SV43	NoSV43 - Sanitary Tee	12"x12"x10"	Cast Iron	ASTM A74	Solvent Welded	NoSV43 - Sanitary Tee	Service Weight	No Finish
ADSK_40000288	DWV	Charlotte	No.SV43	NoSV43 - Sanitary Tee	12"	Cast Iron	ASTM A74	Solvent Welded	NoSV43 - Sanitary Tee	Service Weight	No Finish
ADSK_40000289	DWV	Charlotte	No.SV43	NoSV43 - Sanitary Tee	15"x15"x6"	Cast Iron	ASTM A74	Solvent Welded	NoSV43 - Sanitary Tee	Service Weight	No Finish

FIGURE 1: IMAGE OF MAPPROD INFORMATION

# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

This information can then be sent directly to [CINX](#) and your Database will be prepared to be used with CINX. Once this is complete your Database will be available on the CINX website. See Figure 2 below.

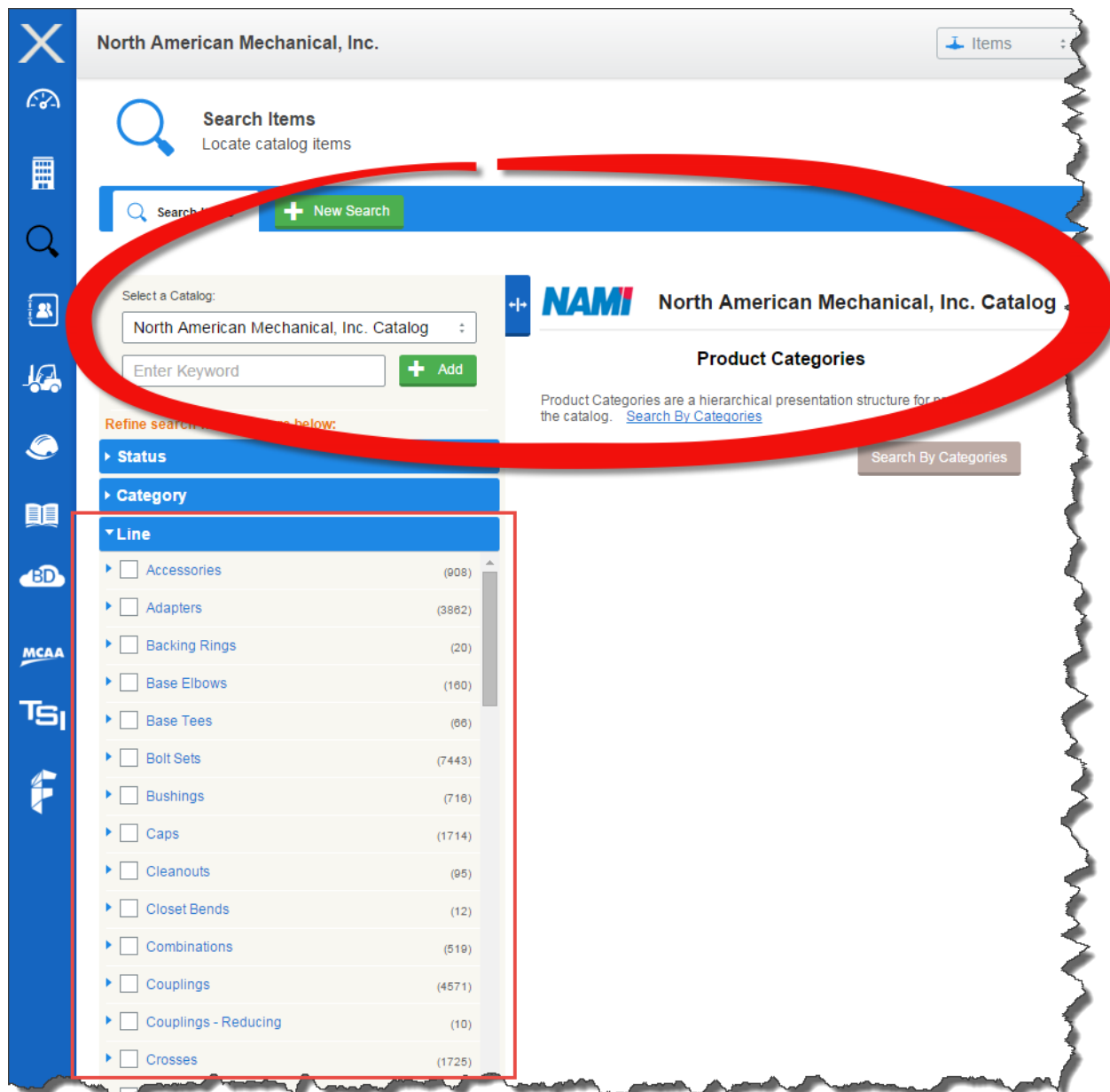


FIGURE 2: IMAGE OF CATALOG ON CINX WEBSITE



# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

## Learn how to configure the Fabrication-to-CINX connection and defaults

The next step is a onetime process that will need to be complete. Selections can be modified at any time but it is not necessary to configure CINX every time before using it.

Locate the CINX Add-In. It can be found in either ESTmep or CADmep. See Figure 3 below for location in ESTmep.

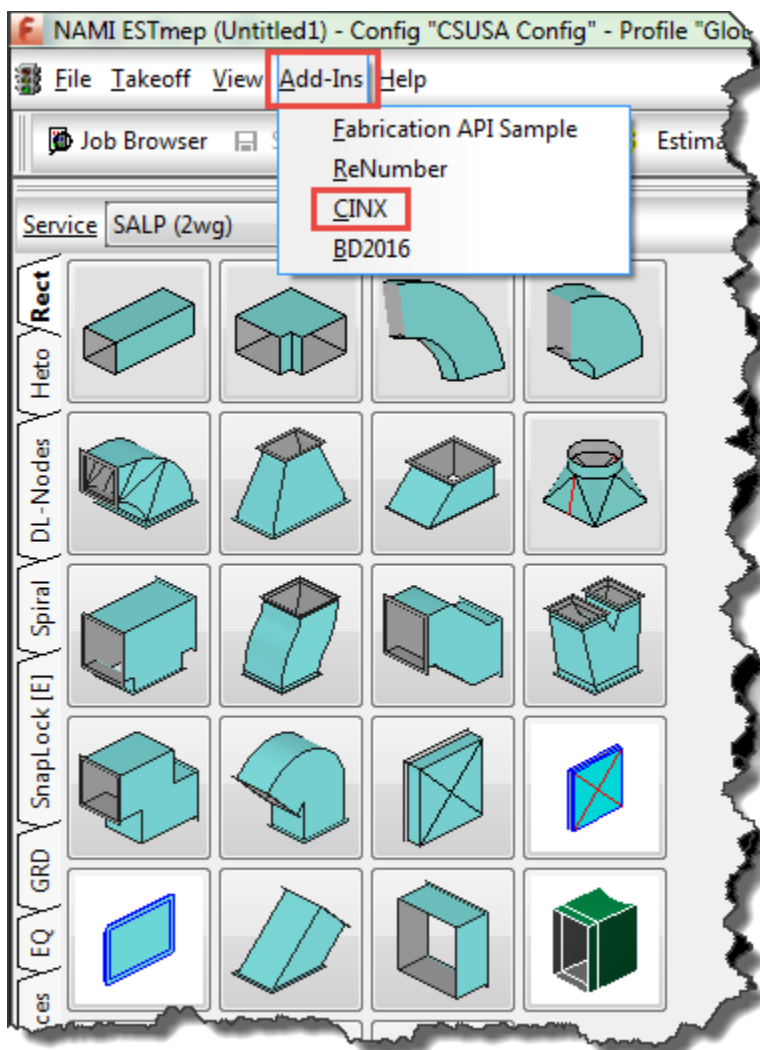


FIGURE 3: IMAGE OF CINX LOCATION IN ESTMEP



# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

**Locate the CINX Add-In. It can be found in either ESTmep or CADmep. See Figure 4 below for location in CADmep.**

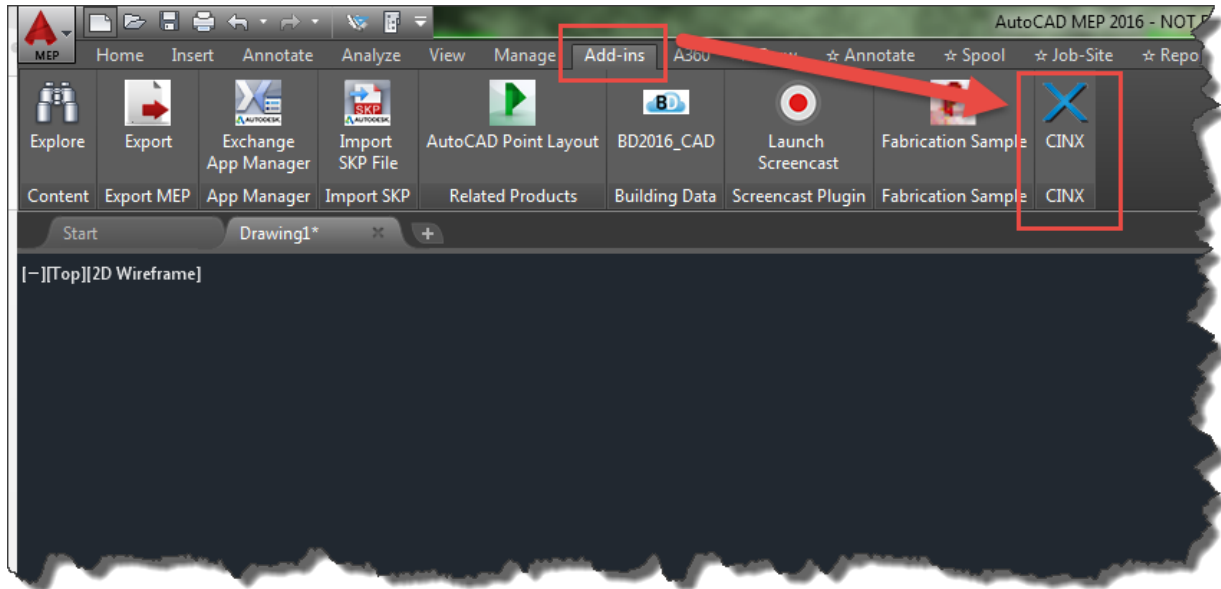


FIGURE 4: IMAGE OF CINX LOCATION IN CADMEP



# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

Once the CINX Add-In is opened you will notice several icons running down the left hand side of the Add-In. We are going to start with the settings icon which looks like a gear. See Figure 5 below.

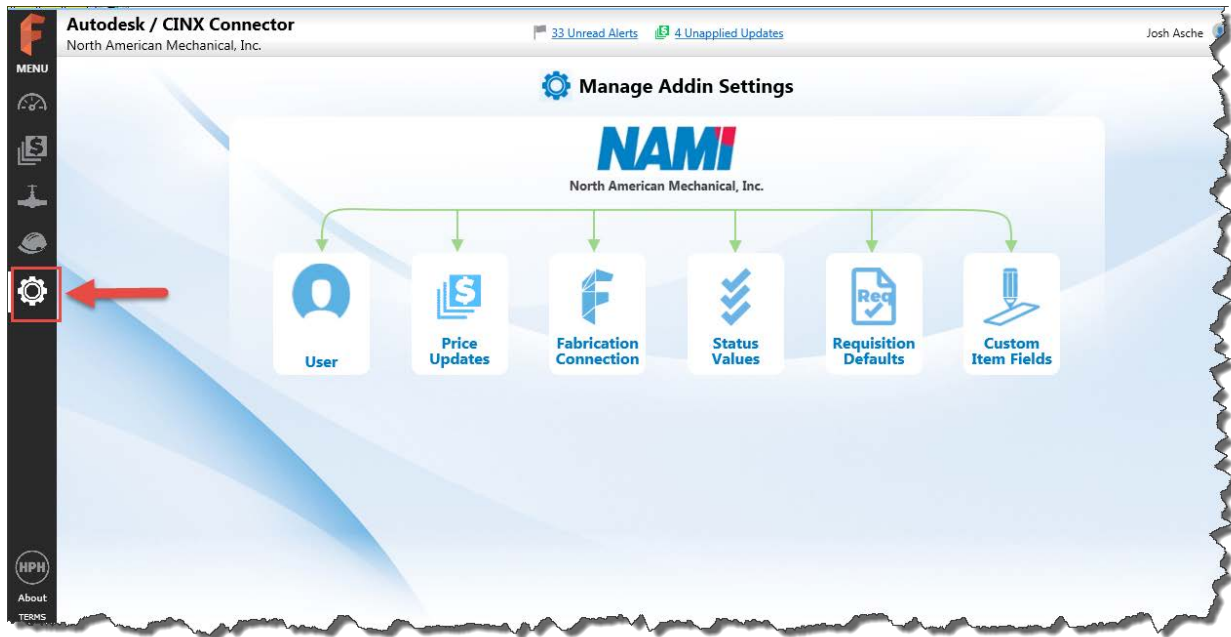


FIGURE 5: IMAGE OF SETTINGS SCREEN IN CINX ADD-IN

# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

For the price update feature of the CINX Add-In we are going to be concentrating on the On the User, Price Updates & Fabrication Connection icons. See Figure 6 below.

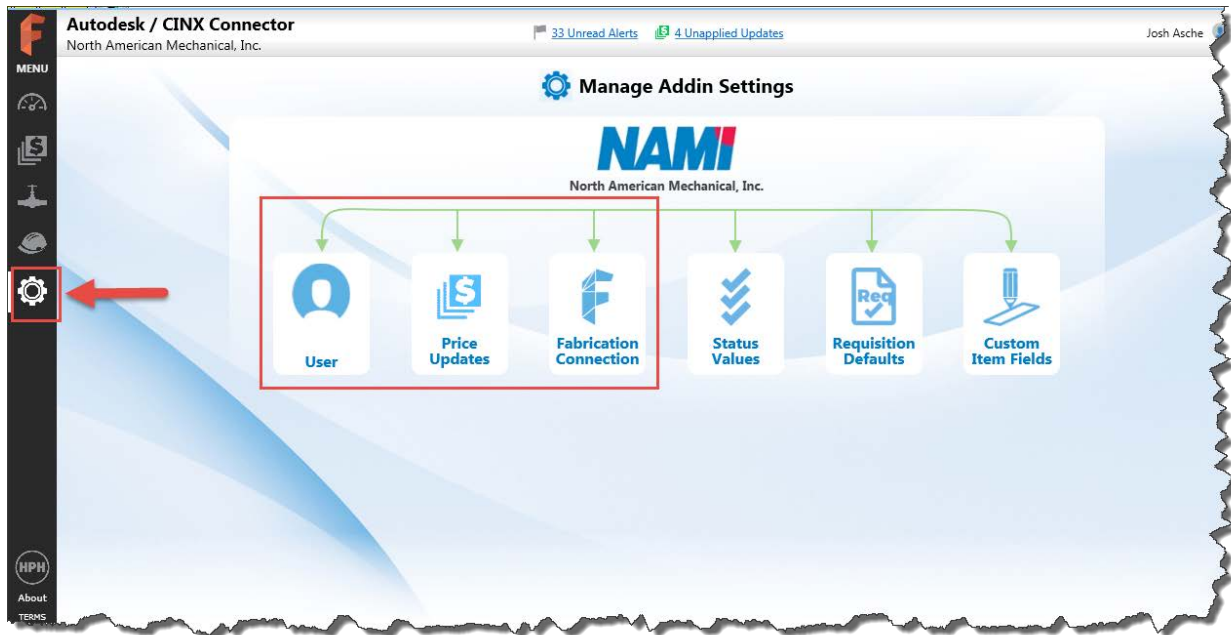


FIGURE 6: IMAGE OF SETTINGS SCREEN IN CINX ADD-IN HIGHLIGHTING AREA OF FOCUS





# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

We are going to start with the User Settings first. See Figure 7 below.



FIGURE 7: IMAGE OF USER SETTINGS BUTTON



# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

Once you click on the User Button the User Setting screen will open. It is here you will need to fill in the information used with CINX. This will be your username and password. You will then need to authenticate it. Once that is complete you will need to select your organization and the catalog you would like to use with CINX. See Figure 8 below.

Autodesk / CINX Connector  
North American Mechanical, Inc.

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### User Settings

This page will allow you to manage your CINX account settings.

#### CINX Login Information

Email:

Password:  [forget CINX password?](#)

[To set up a CINX account click here.](#)

Organization:  ▼

Catalog:  ▼

FIGURE 8: IMAGE OF USER SETTINGS INFORMATION



# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

The next setting we are going to look at is the Price Updates Button. See Figure 9 below.



FIGURE 9: IMAGE OF PRICE UPDATES BUTTON

Upon clicking on the Price Updates button the Price Updates Settings screen will open up. It is here that you can set up several settings for the Price Updates. See Figure 10 below.

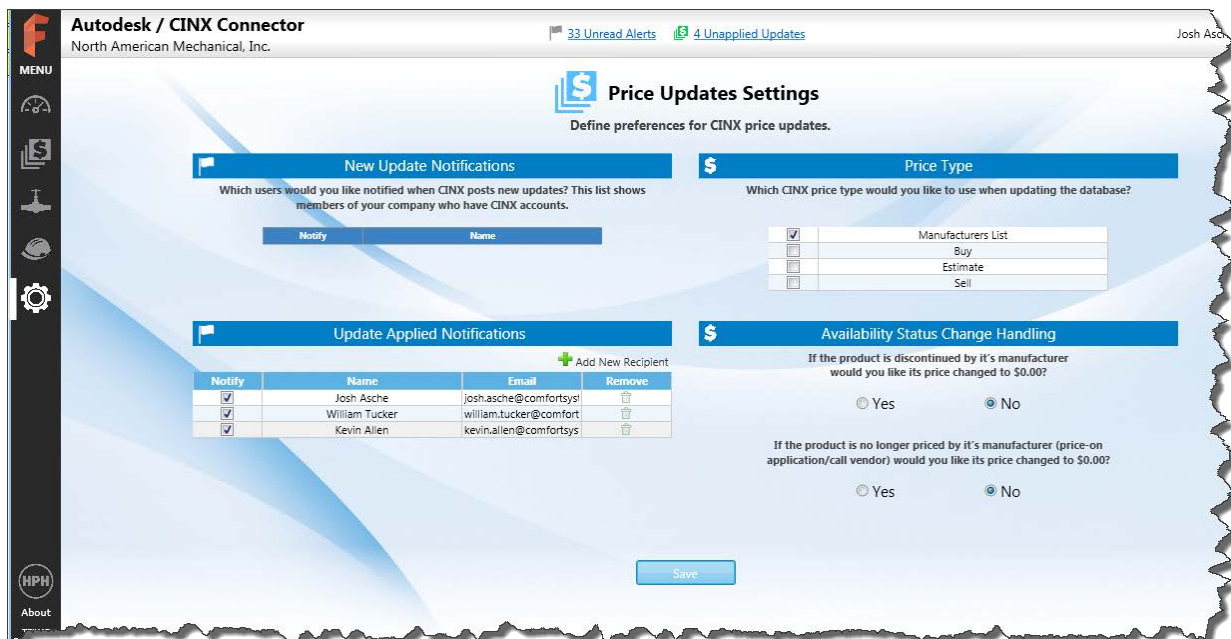


FIGURE 10: IMAGE OF PRICE UPDATE SETTINGS INFORMATION



# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

On the Price Updates Settings button there are several settings that can be configured. The first one is to define who is to get an email notification once a price update has been applied to the database. See Figure 11 below.

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### Price Updates Settings

Define preferences for CINX price updates.

#### New Update Notifications

Which users would you like notified when CINX posts new updates? This list shows members of your company who have CINX accounts.

Notify	Name
--------	------

#### Price Type

Which CINX price type would you like to use when updating the database?

<input checked="" type="checkbox"/>	Manufacturers List
<input type="checkbox"/>	Buy
<input type="checkbox"/>	Estimate
<input type="checkbox"/>	Sell

#### Update Applied Notifications

+ Add New Recipient

Notify	Name	Email	Remove
<input checked="" type="checkbox"/>	Josh Asche	josh.asche@comfortsys1	
<input checked="" type="checkbox"/>	William Tucker	william.tucker@comfort	
<input checked="" type="checkbox"/>	Kevin Allen	kevin.allen@comfortsys	

#### Availability Status Change Handling

If the product is discontinued by it's manufacturer would you like its price changed to \$0.00?

☐ Yes ☒ No

If the product is no longer priced by it's manufacturer (price-on application/call vendor) would you like its price changed to \$0.00?

☐ Yes ☒ No

Save

FIGURE 11: IMAGE OF PRICE UPDATE NOTIFICATIONS



# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

The next setting is to define the type of price update you would like to receive. We are going to focus on the Manufacturers List price which is also the most common. We will look at the other Price Type options in the next learning objective. See Figure 12 below.

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North American Mechanical, Inc.

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### Price Updates Settings

Define preferences for CINX price updates.

#### New Update Notifications

Which users would you like notified when CINX posts new updates? This list shows members of your company who have CINX accounts.

Notify	Name
--------	------

#### Update Applied Notifications

+ Add New Recipient

Notify	Name	Email	Remove
<input checked="" type="checkbox"/>	Josh Asche	josh.asche@comfortsys1	
<input checked="" type="checkbox"/>	William Tucker	william.tucker@comfort	
<input checked="" type="checkbox"/>	Kevin Allen	kevin.allen@comfortsys	

#### Price Type

Which CINX price type would you like to use when updating the database?

<input checked="" type="checkbox"/>	Manufacturers List
<input type="checkbox"/>	Buy
<input type="checkbox"/>	Estimate
<input type="checkbox"/>	Sell

#### Availability Status Change Handling

If the product is discontinued by it's manufacturer would you like its price changed to \$0.00?

☐ Yes ☒ No

If the product is no longer priced by it's manufacturer (price-on application/call vendor) would you like its price changed to \$0.00?

☐ Yes ☒ No

Save

FIGURE 12: IMAGE OF PRICE UPDATE TYPE OPTIONS

# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

The remaining settings are for controlling how you would like to handle item availability. This allows the user to decide how items that have been discontinued and no longer are price behave. See Figure 13 below.

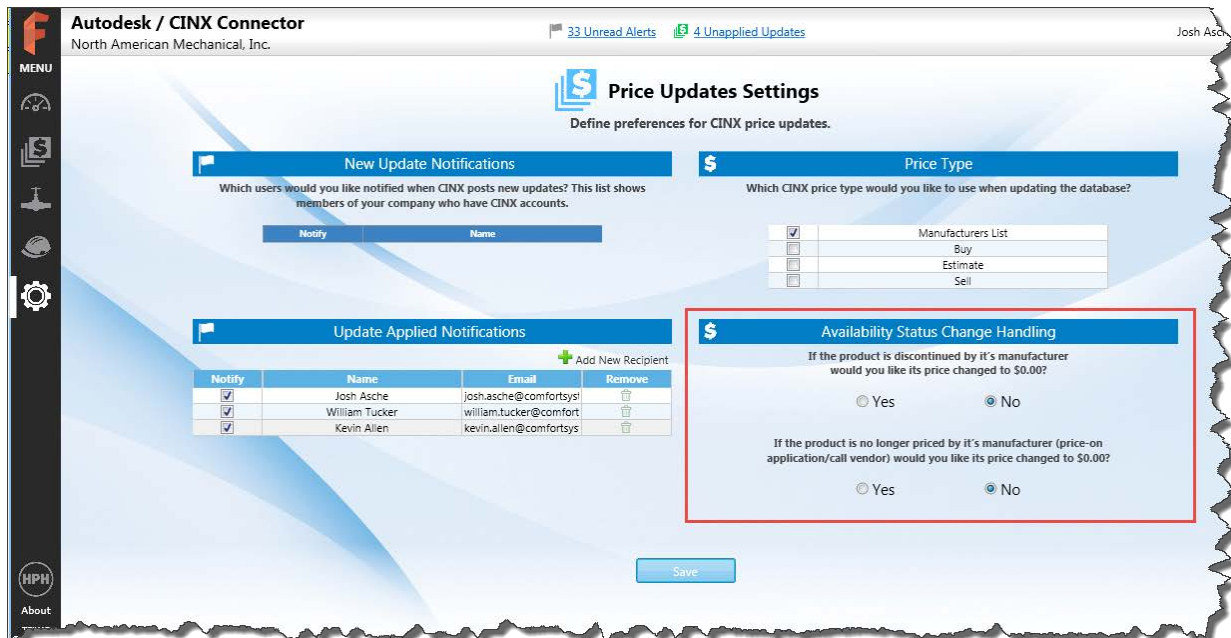


FIGURE 14: IMAGE OF ITEM AVAILABILITY SETTINGS

The last setting that needs to be configured is the Fabrication Connection. See Figure 14 below.

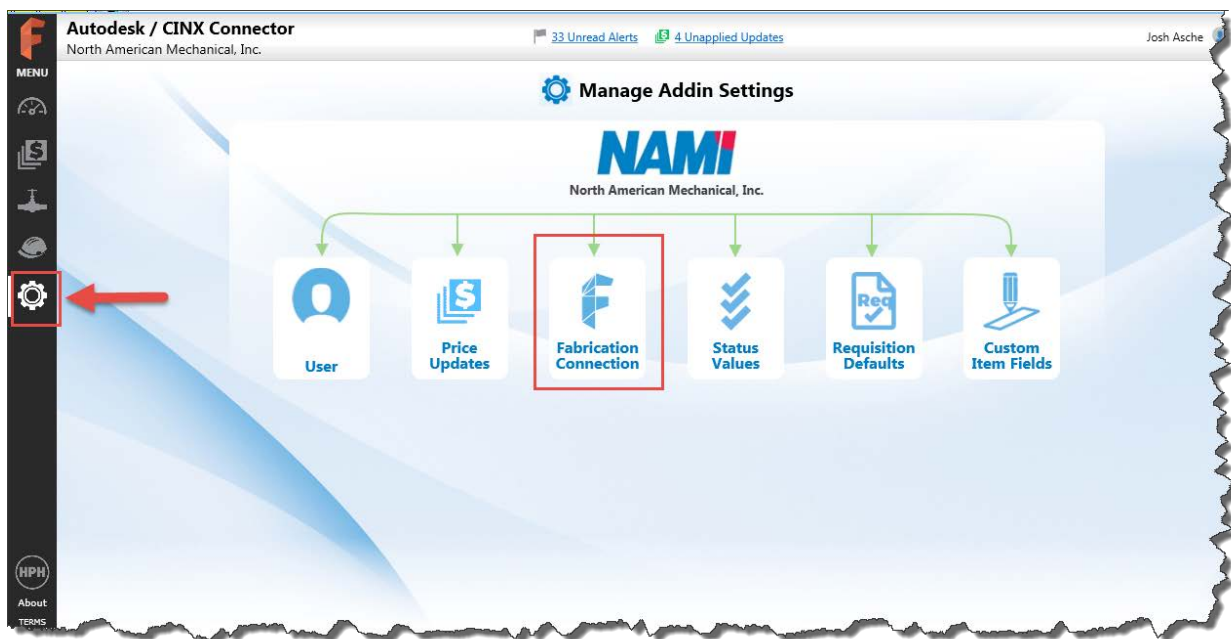


FIGURE 14: IMAGE OF FABRICATION CONNECTION BUTTON





# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

Upon opening the Fabrication Connection Button the user will need to define 3 pieces of information. The first selection is to select the Supplier Group that is to be updated. The next selection is to define the Price List that is to be updated. The final option is to select the Supplier ID (Set up in Mapprod) that is to be used. See Figures 15 and 16 below.

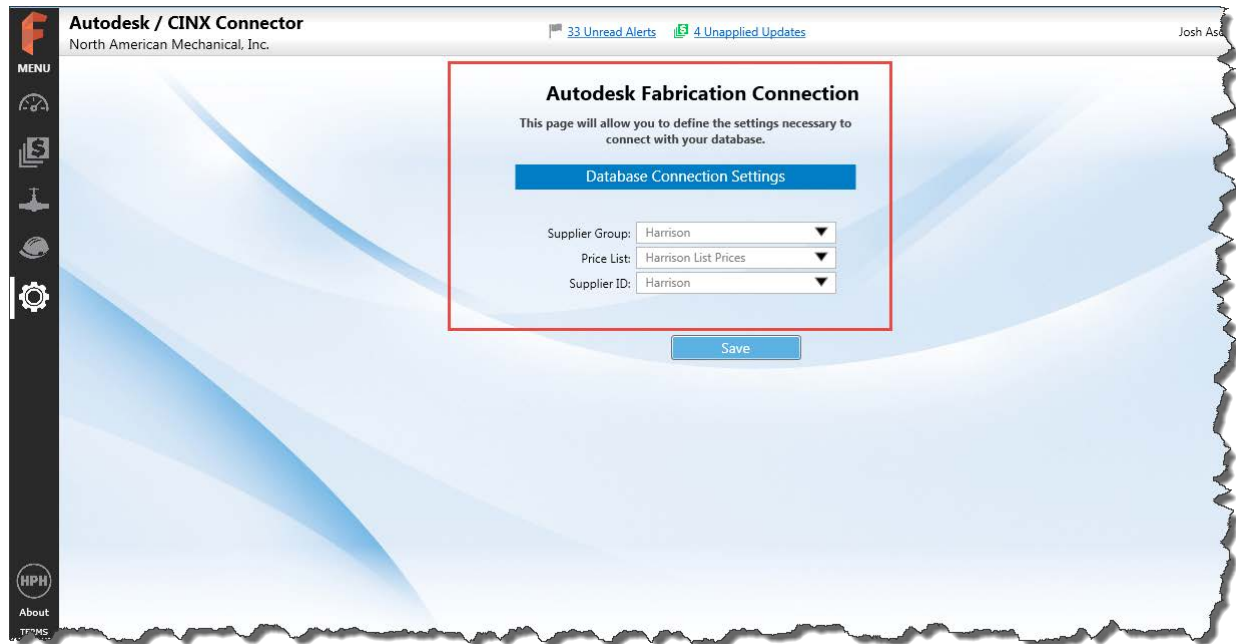
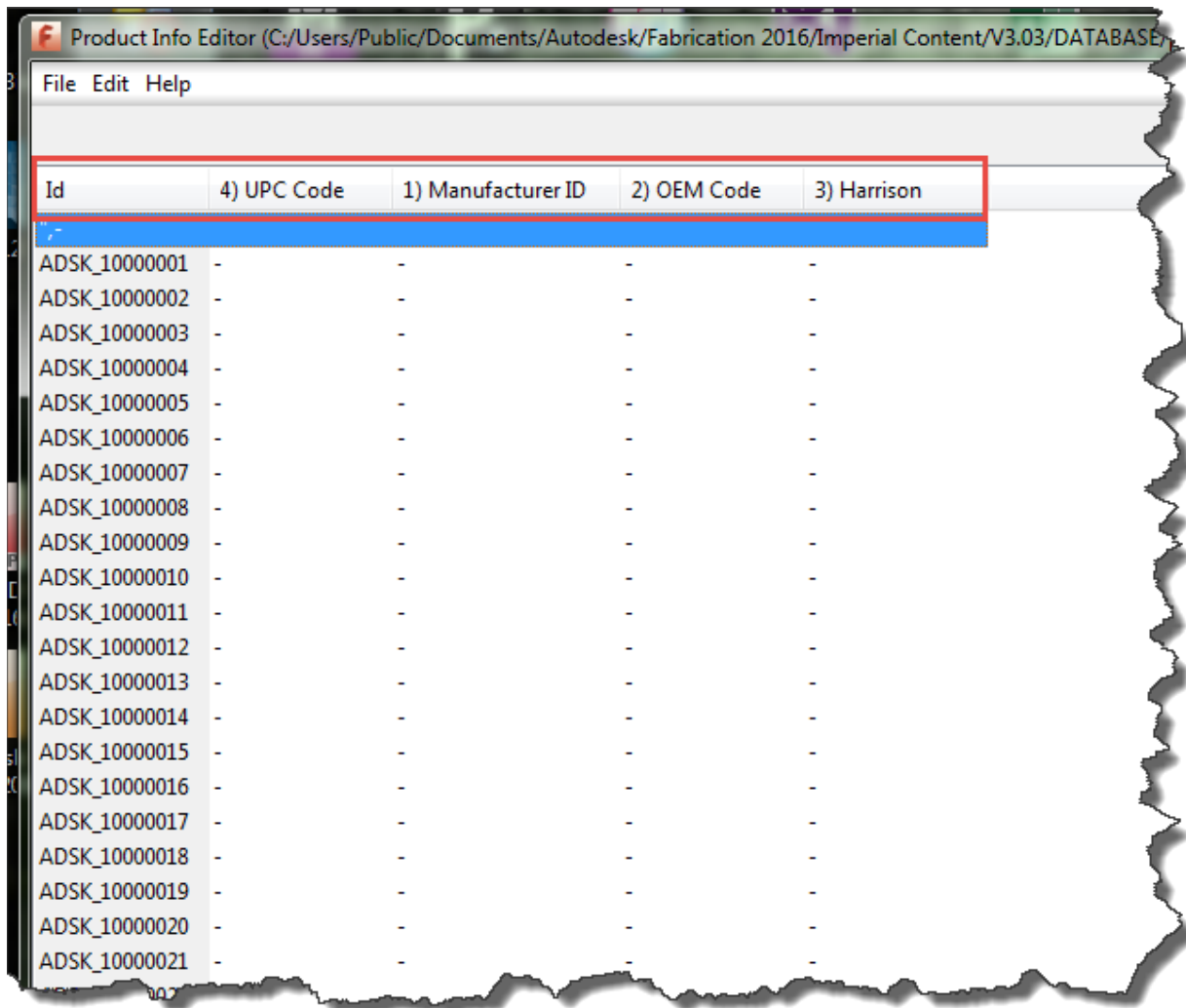


FIGURE 15: IMAGE OF FABRICATION CONNECTION SETTINGS



# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication



Product Info Editor (C:/Users/Public/Documents/Autodesk/Fabrication 2016/Imperial Content/V3.03/DATABASE)

File Edit Help

Id	4) UPC Code	1) Manufacturer ID	2) OEM Code	3) Harrison
ADSK_10000001	-	-	-	-
ADSK_10000002	-	-	-	-
ADSK_10000003	-	-	-	-
ADSK_10000004	-	-	-	-
ADSK_10000005	-	-	-	-
ADSK_10000006	-	-	-	-
ADSK_10000007	-	-	-	-
ADSK_10000008	-	-	-	-
ADSK_10000009	-	-	-	-
ADSK_10000010	-	-	-	-
ADSK_10000011	-	-	-	-
ADSK_10000012	-	-	-	-
ADSK_10000013	-	-	-	-
ADSK_10000014	-	-	-	-
ADSK_10000015	-	-	-	-
ADSK_10000016	-	-	-	-
ADSK_10000017	-	-	-	-
ADSK_10000018	-	-	-	-
ADSK_10000019	-	-	-	-
ADSK_10000020	-	-	-	-
ADSK_10000021	-	-	-	-

FIGURE 16: IMAGE OF SUPPLIERS IN MAPPROD





# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

## Learn how to select the best material price type to use in Fabrication updates

Previously we looked at the different types of Price Update Types that could be applied to your database. I wanted to go a little bit further in depth on these options to be sure you are selecting the correct type. See Figures 17 and 18 below.

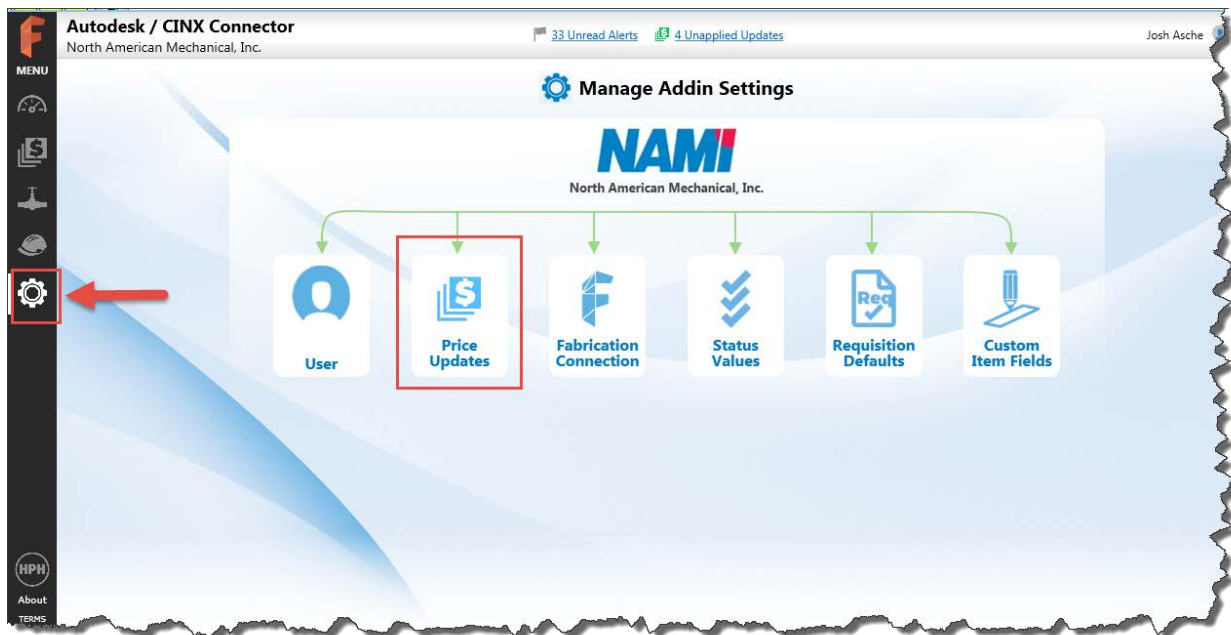


FIGURE 17: IMAGE OF CINX INTERFACE WHERE TYPE OF PRICE UPDATE IS SELECTED

# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

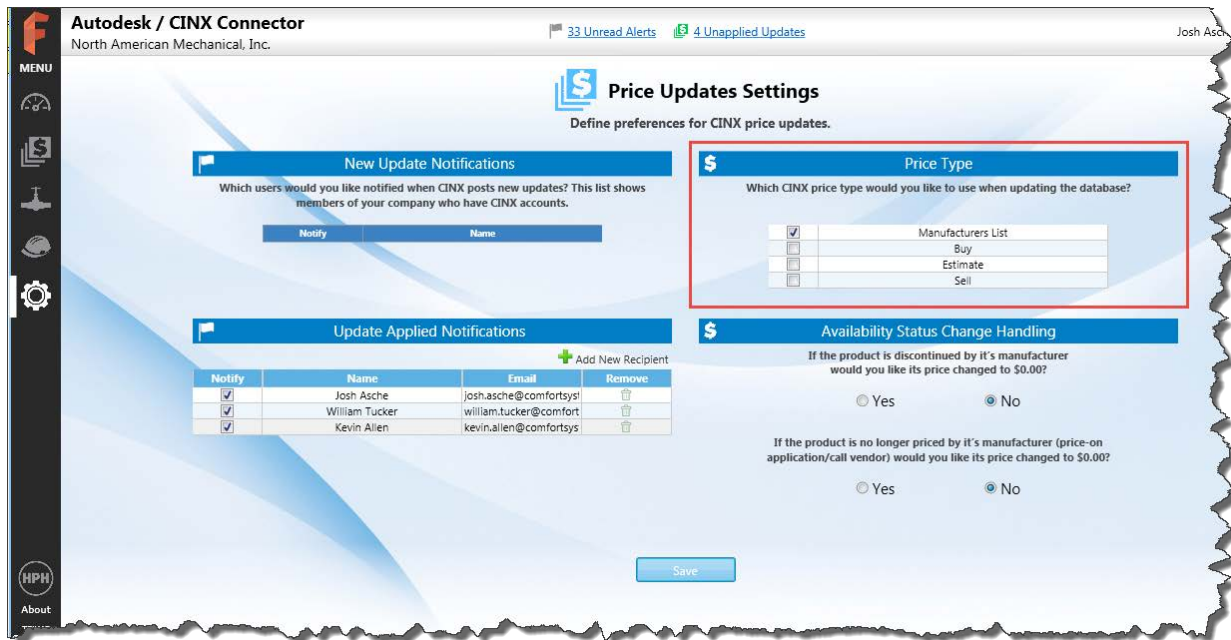


FIGURE 18: IMAGE OF PRICE TYPE OPTIONS IN CINX

**Manufacturers List-**Is going to be the most common Price Type of update. This is going to be list price directly from the manufacturer.

**Buy-**This option is going to reflect the price that you can buy your items from the distributor.

**Estimate-**This option is going to be your cost plus in order to be sure you are covered from fluctuation.

**Sell-**The Sell option is going to be cost plus markup used typically in Change Order Situations.

As you can see it is important to make sure you are selecting the correct option for your situation when running price updates.



# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

Learn how to apply a price update and notifying other users of the changes

In order to apply a pricing update you will need to browse the \$ Button on the CINX Add-In Interface. See Figure 19 below.

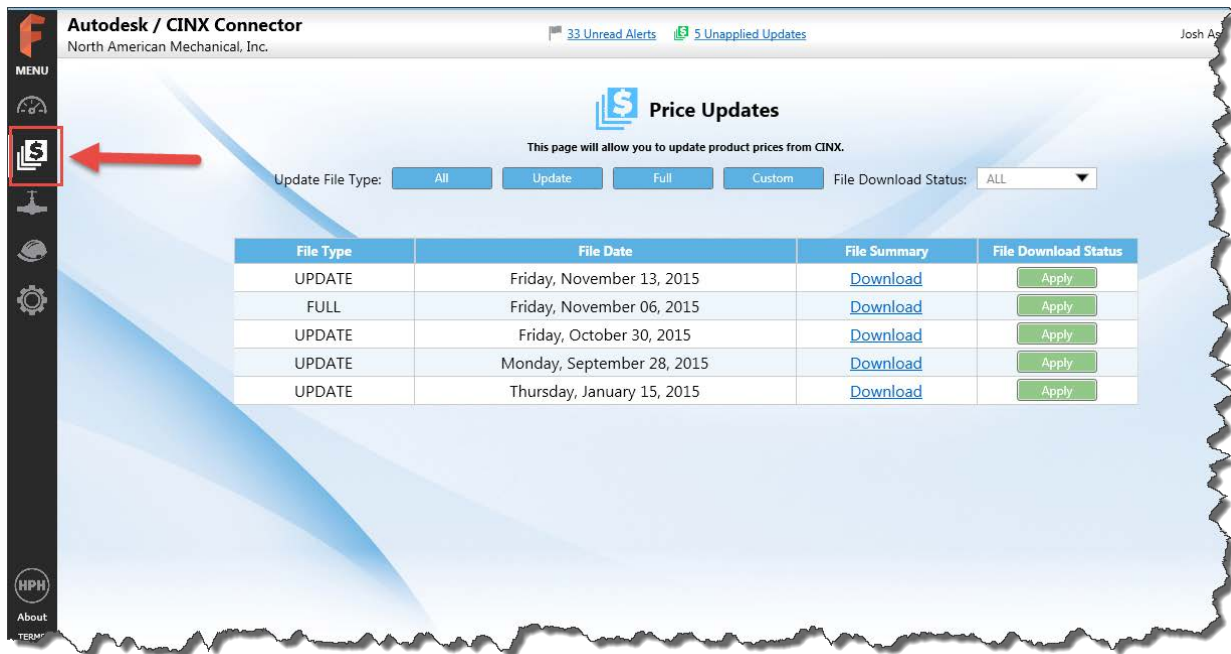


FIGURE 19: IMAGE OF PRICE UPDATE SCREEN IN CINX ADD-IN



# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

It is at this screen that you will be able to see what updates are available for your database. You can also use Update File Type Buttons to filter what updates are visible. See Figure 20 below.

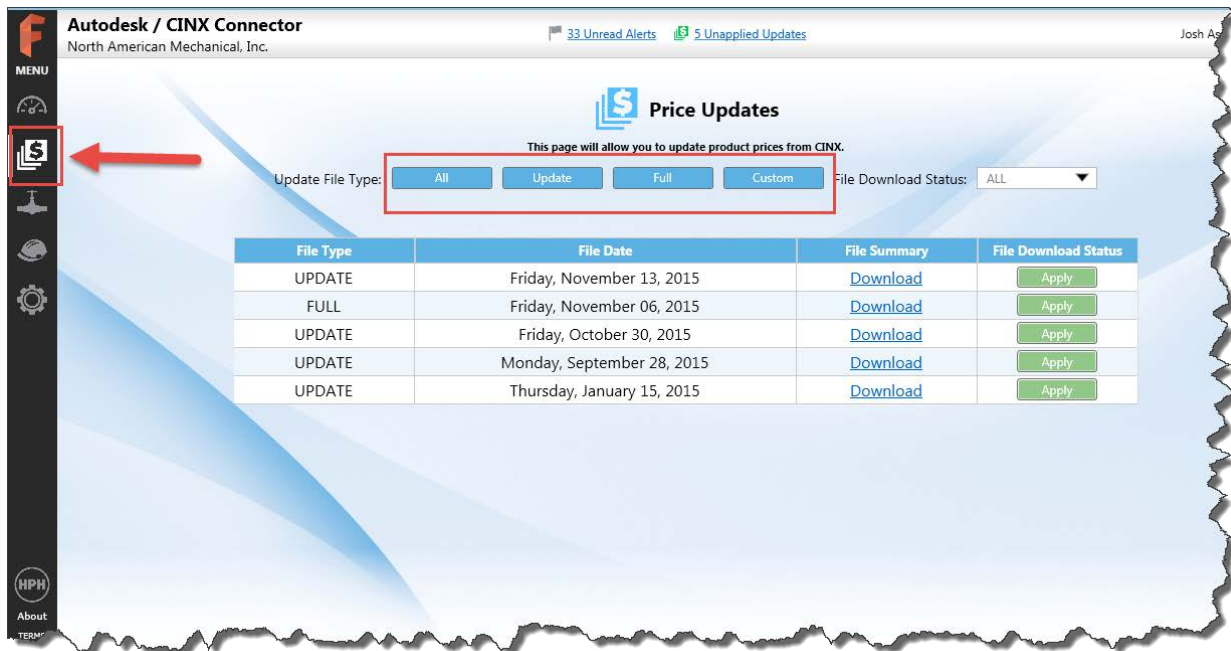


FIGURE 20: IMAGE OF UPDATE FILE TYPE BUTTON FILTERS

You can also filter by the File Download Status of the Price Updates. See Figure 21 below.

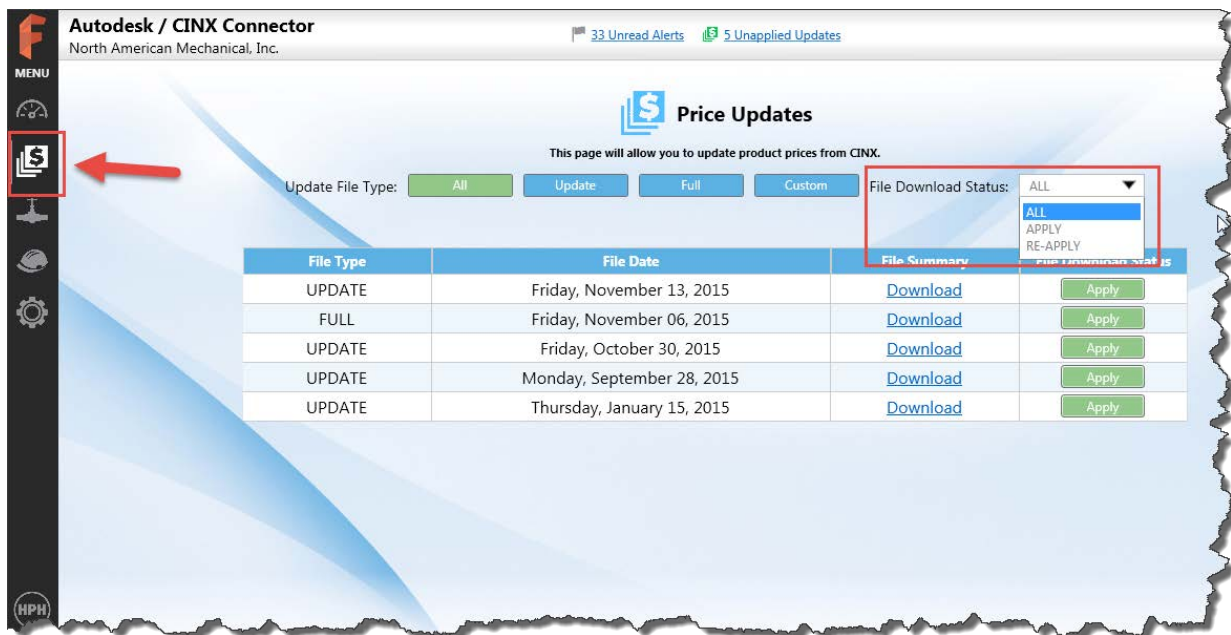


FIGURE 21: IMAGE OF FILE DOWNLOAD STATUS FILTER OPTIONS



# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

Once the user has determined what price update they would like to apply the price update will need to be applied to the Database. If you are using Profiles be sure you are in the correct Profile. You also have the option of downloading the File Summary allowing the user to view what all is included in the Price Update before applying. See Figures 22 and 23 below.

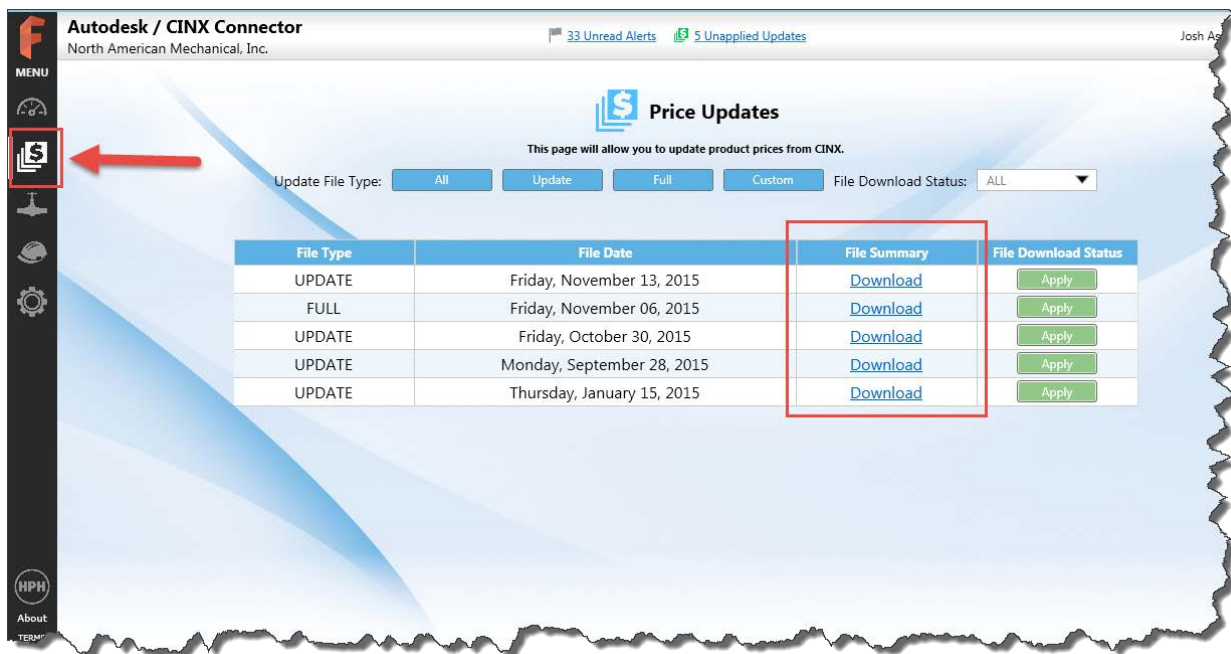
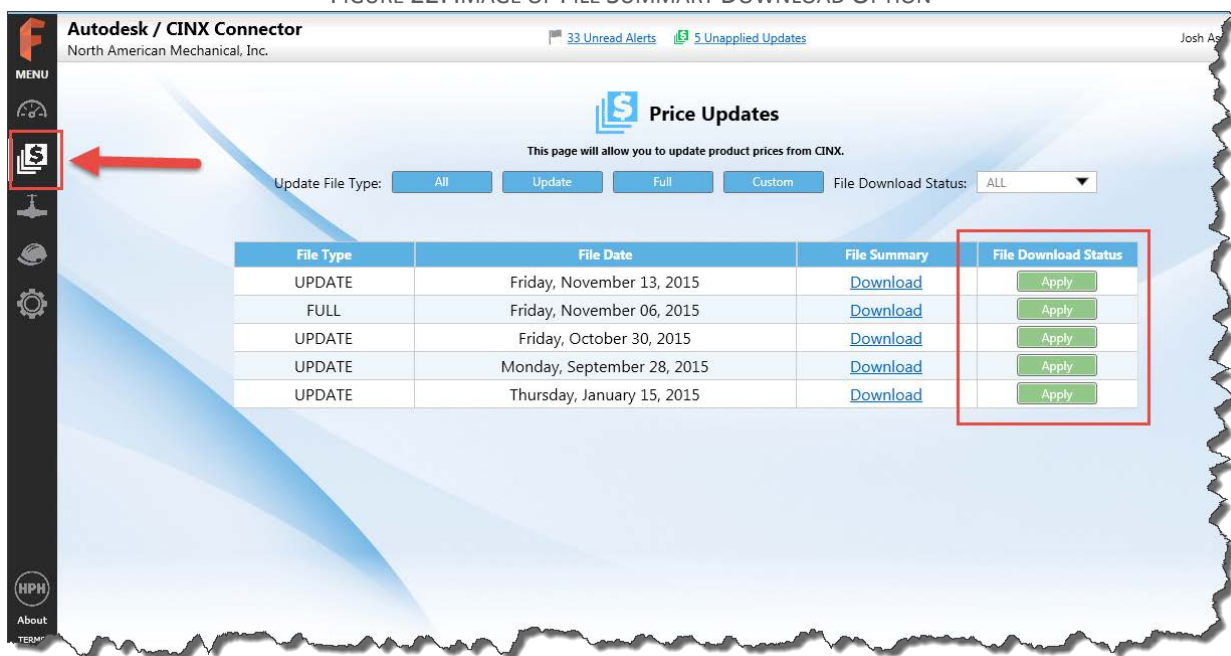


FIGURE 22: IMAGE OF FILE SUMMARY DOWNLOAD OPTION





# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

Once the Price Update has been applied a Price Update Preview Report is available for the user to review. The Price Update has now been applied to your database. See Figure 24 below.



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33 Unread Alerts 5 Unapplied Updates

Josh Asche

### Price Update Preview Report

Preview the changes to your database.  
Update Type: UPDATE  
September 28, 2015

View: [Item Price Changes](#) [Item Status Changes](#) [Manufacturer Price Sheets](#)

Total records: 0

ADSK Number	HPH Item Code	Mfr Part Number	Manufacturer	Description	Current Price	New Price	% Change	Manufacturer Price Sheet	Price Sheet Effective Date	Last Updated	Delete
-------------	---------------	-----------------	--------------	-------------	---------------	-----------	----------	--------------------------	----------------------------	--------------	--------

FIGURE 24: IMAGE OF PRICE UPDATE PREVIEW REPORT

Time permitting we will visit the Project portion of CINX allowing the user to view spools and submit RFQ's directly to the purchasing department. See Figure 25 below.



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### AU 2015

Project Number: 0

Sections	2
Services	4
Drawings	1
Zones	2
Spools	1
Tickets	1
Phases	1

Pending Deliveries	0
Back-Orders	0
Lead-Times	0

Project Definition

Items

- [Spools](#)
- [Work Orders](#)
- [Shop Requisitions](#)

Reports

- [Back Orders](#)
- [Pending Deliveries](#)
- [Lead Times](#)

Quick Links

- [Create Material Requisition](#)
- [Open Project in CINX](#)
- [Upload all Items to CINX](#)

FIGURE 25: IMAGE OF PROJECT BUTTON IN CINX ADD-IN



# Managing Material Pricing Using A Cloud-Based Add-in For Fabrication

