AUTODESK **UNIVERSITY** 2015

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# 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

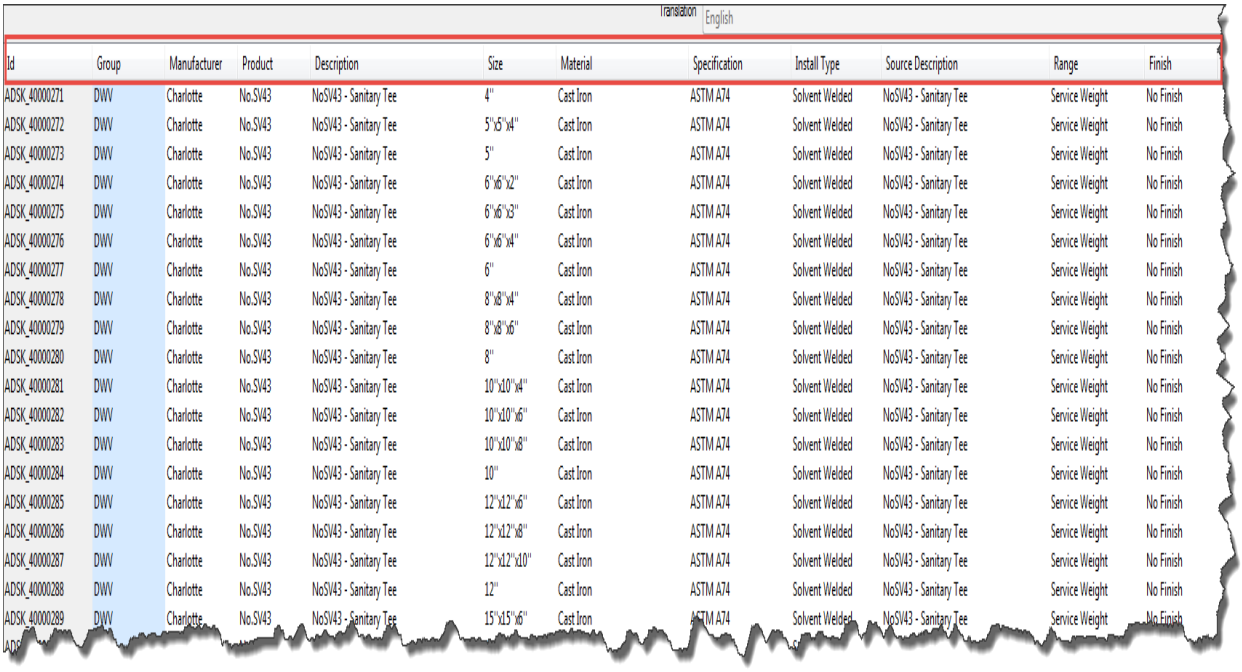
*William is currently working at Comfort Systems USA, a Premier Mechanical Systems Installation and Service provider, as BIM Trainer and Product Specialist. CSUSA is a national organization with 23 companies, 6 Sheet Metal Fabrication Shops and 154 users currently sharing the Autodesk Fabrication Products 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

**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.**

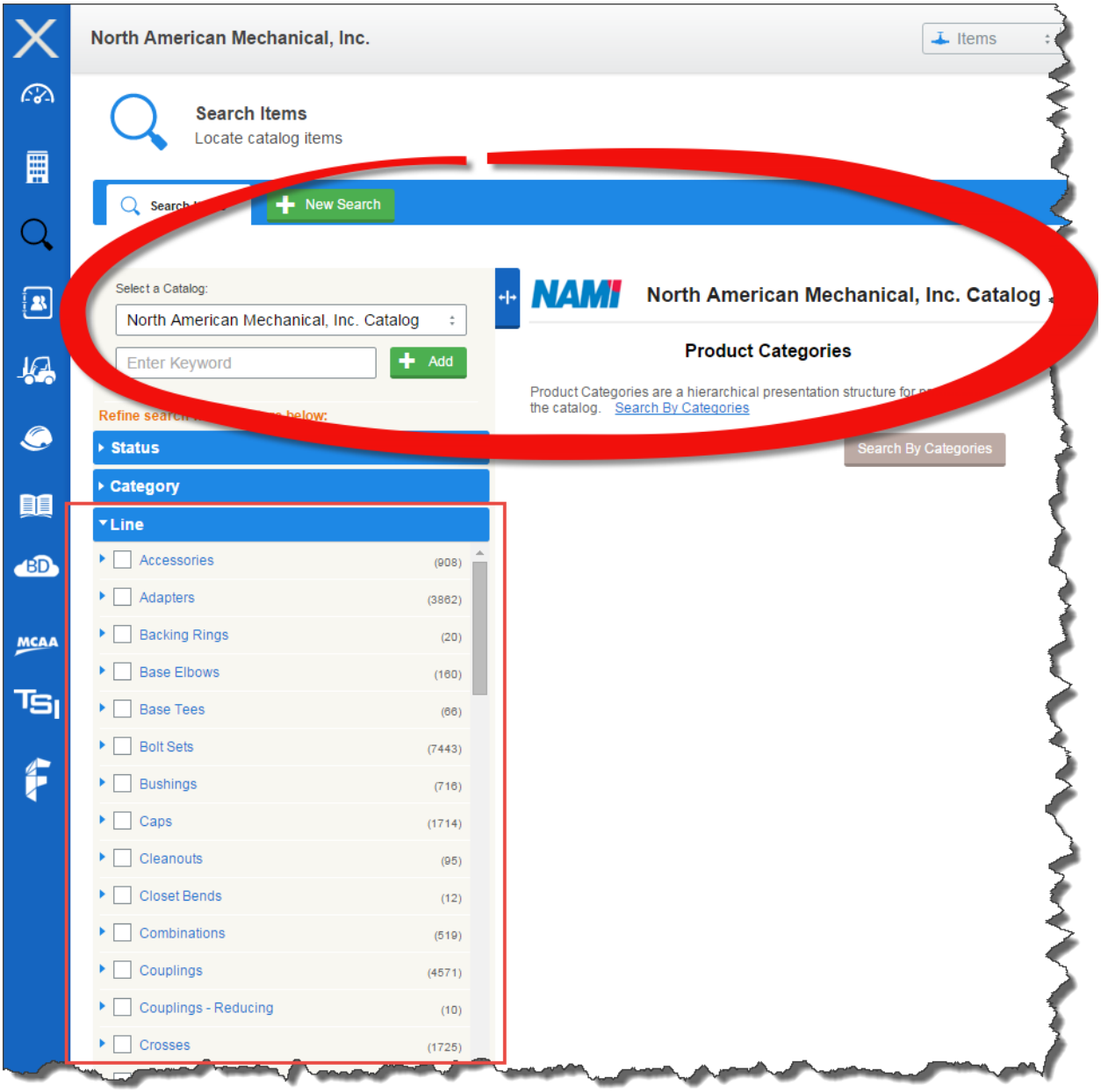



FIGURE 2: IMAGE OF CATALOG ON CINX WEBSITE

### 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.**

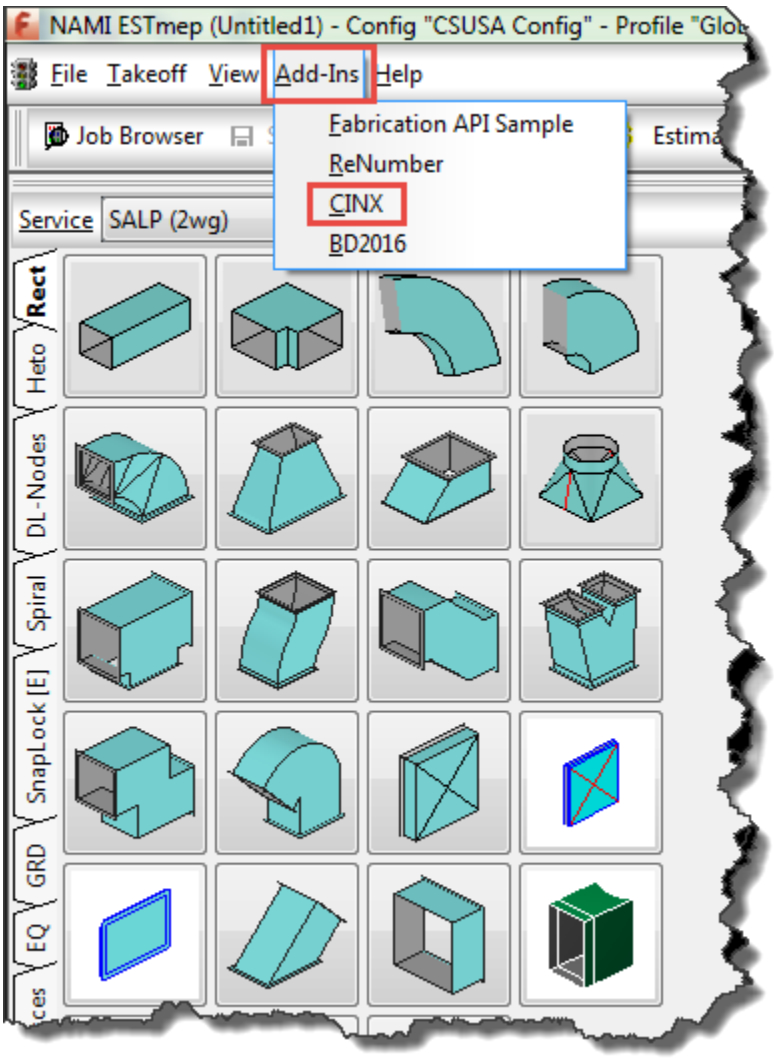



FIGURE 3: IMAGE OF CINX LOCATION IN ESTMEP

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

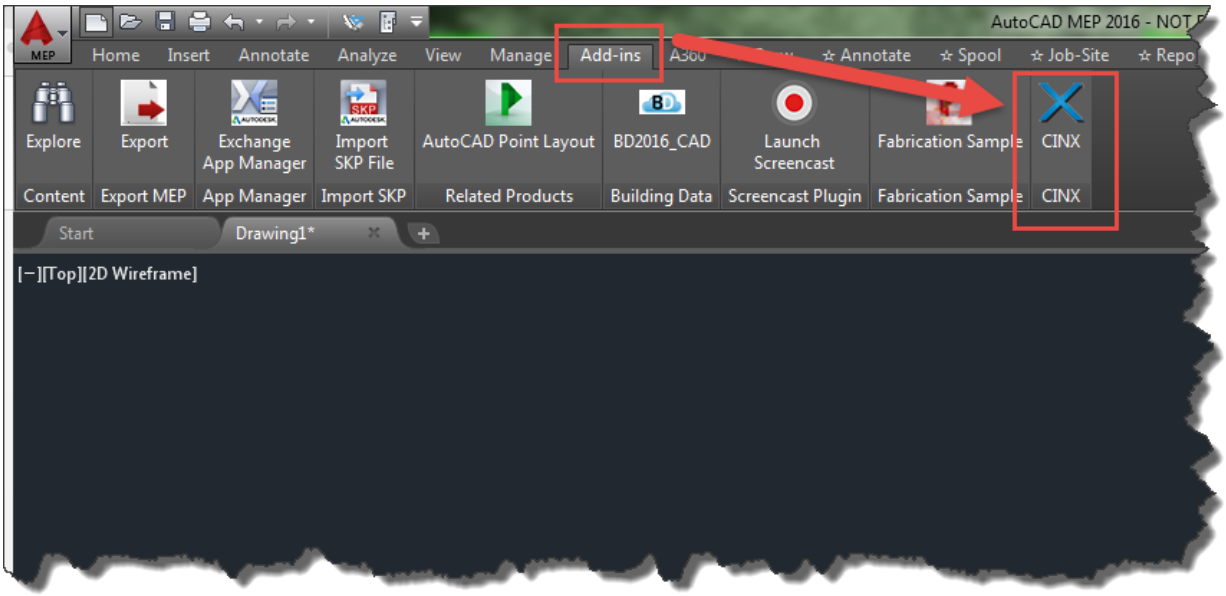



FIGURE 4: IMAGE OF CINX LOCATION IN CADMEP

**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

**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

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

FIGURE 7: IMAGE OF USER SETTINGS BUTTON

**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.**

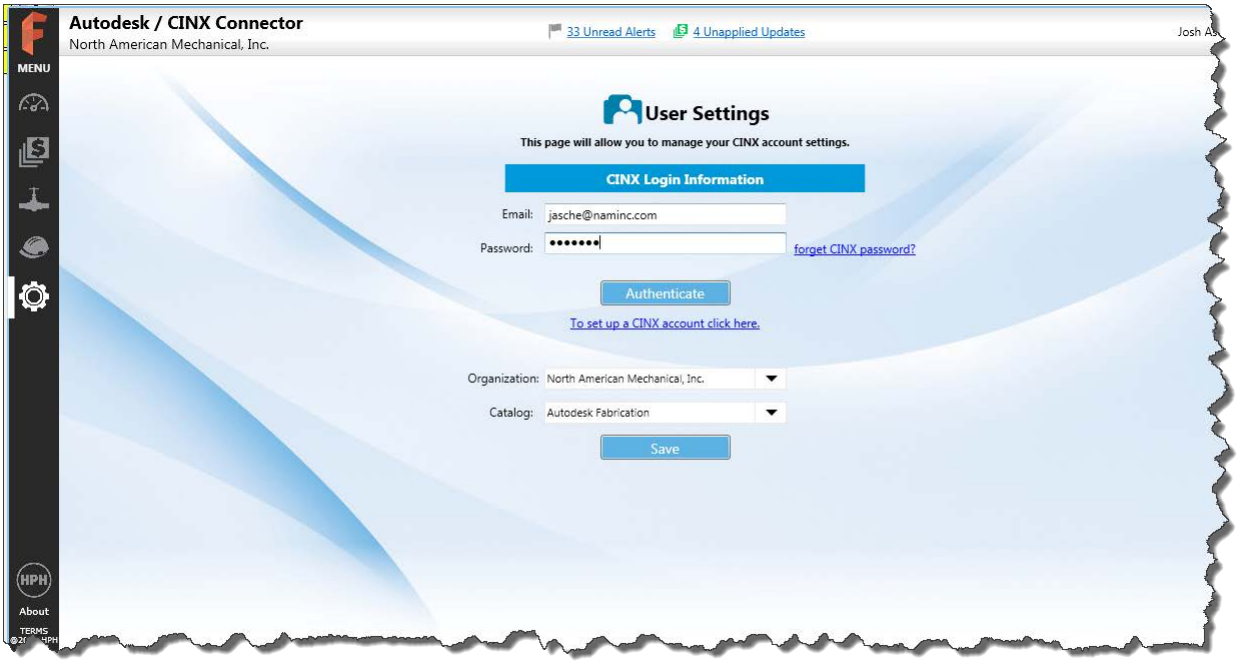



FIGURE 8: IMAGE OF USER SETTINGS INFORMATION

**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.**

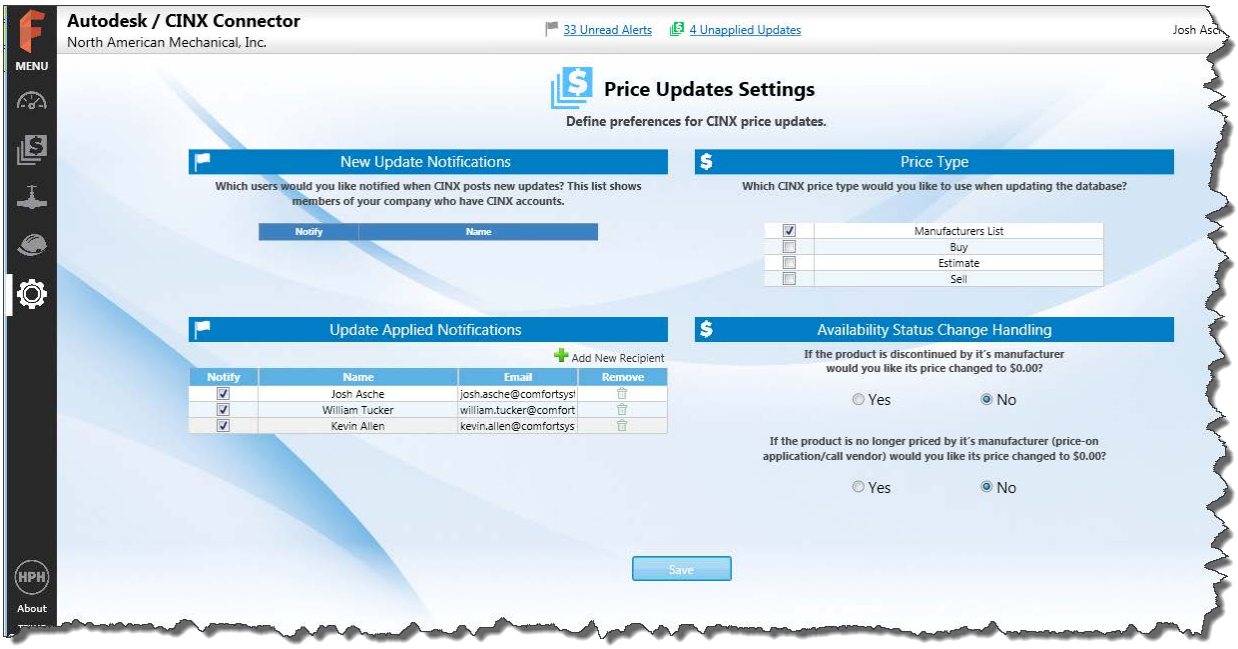



FIGURE 10: IMAGE OF PRICE UPDATE SETTINGS INFORMATION

**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.**

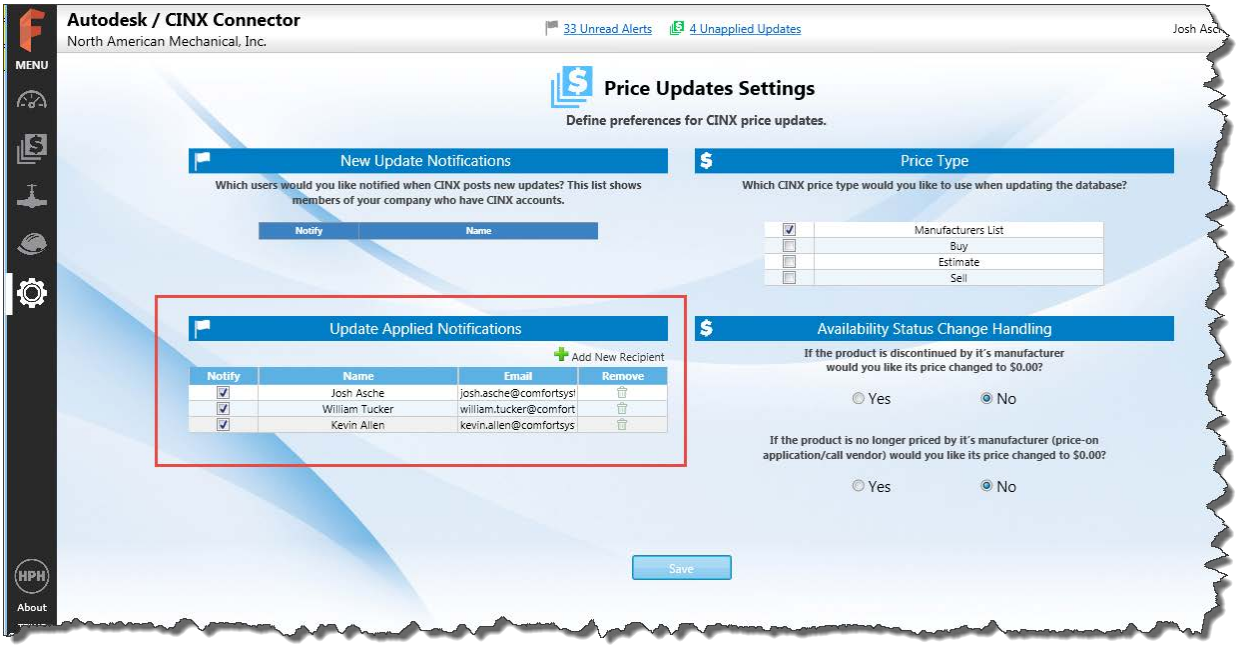



FIGURE 11: IMAGE OF PRICE UPDATE NOTIFICATIONS

**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.**

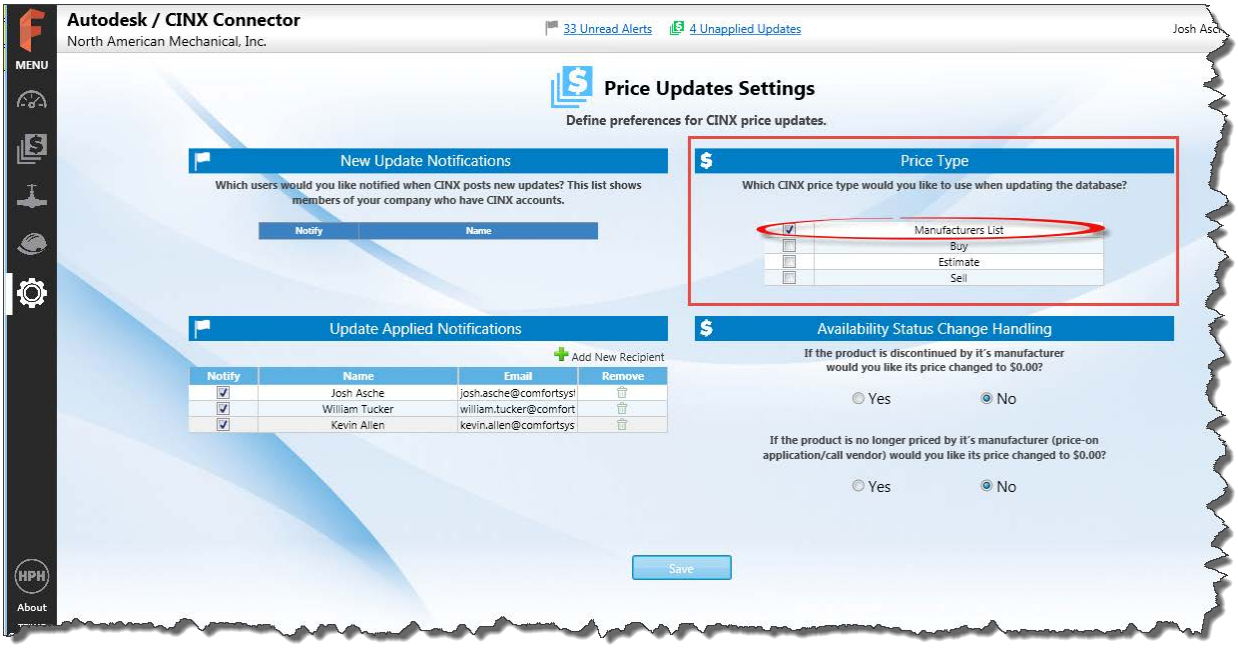



FIGURE 12: IMAGE OF PRICE UPDATE TYPE OPTIONS

**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.**

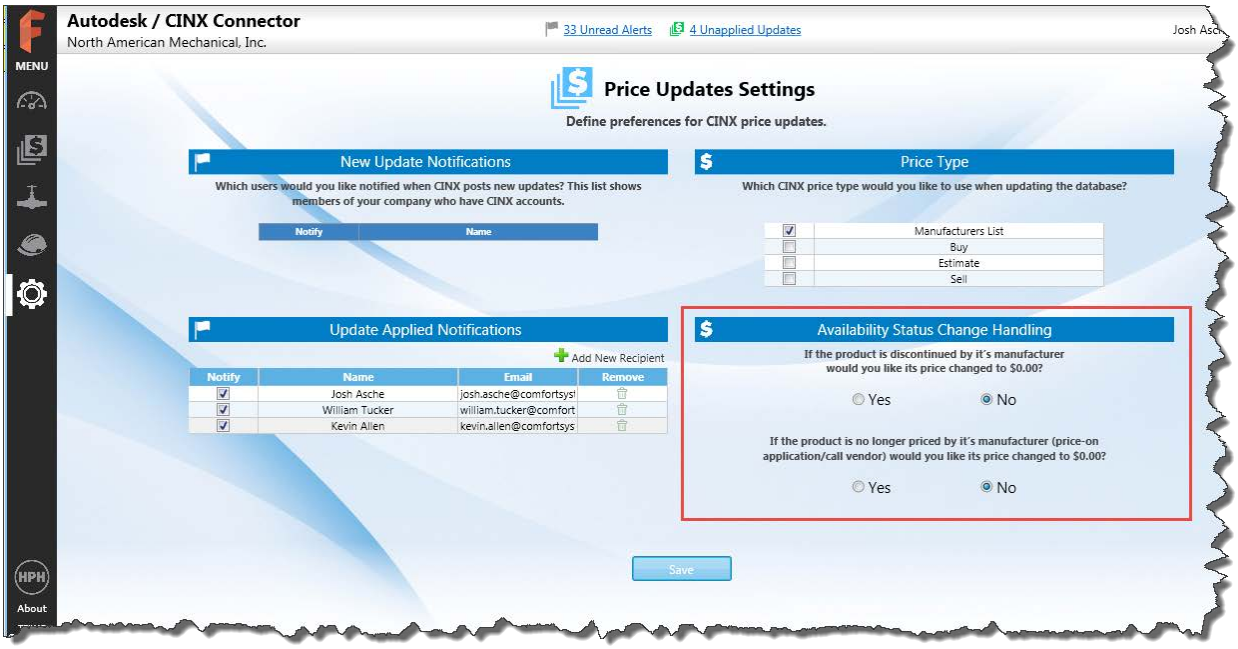



FIGURE 14: IMAGE OF ITEM AVAILABILITY SETTINGS

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

FIGURE 14: IMAGE OF FABRICATION CONNECTION BUTTON

**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.**

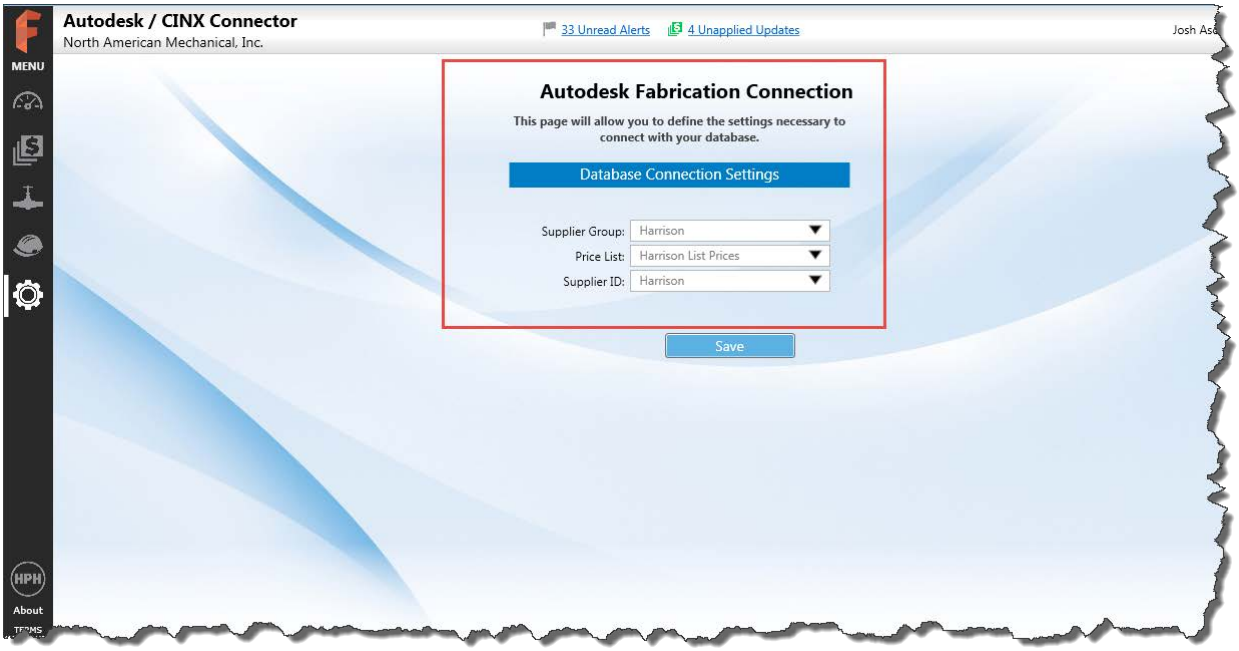



FIGURE 15: IMAGE OF FABRICATION CONNECTION SETTINGS

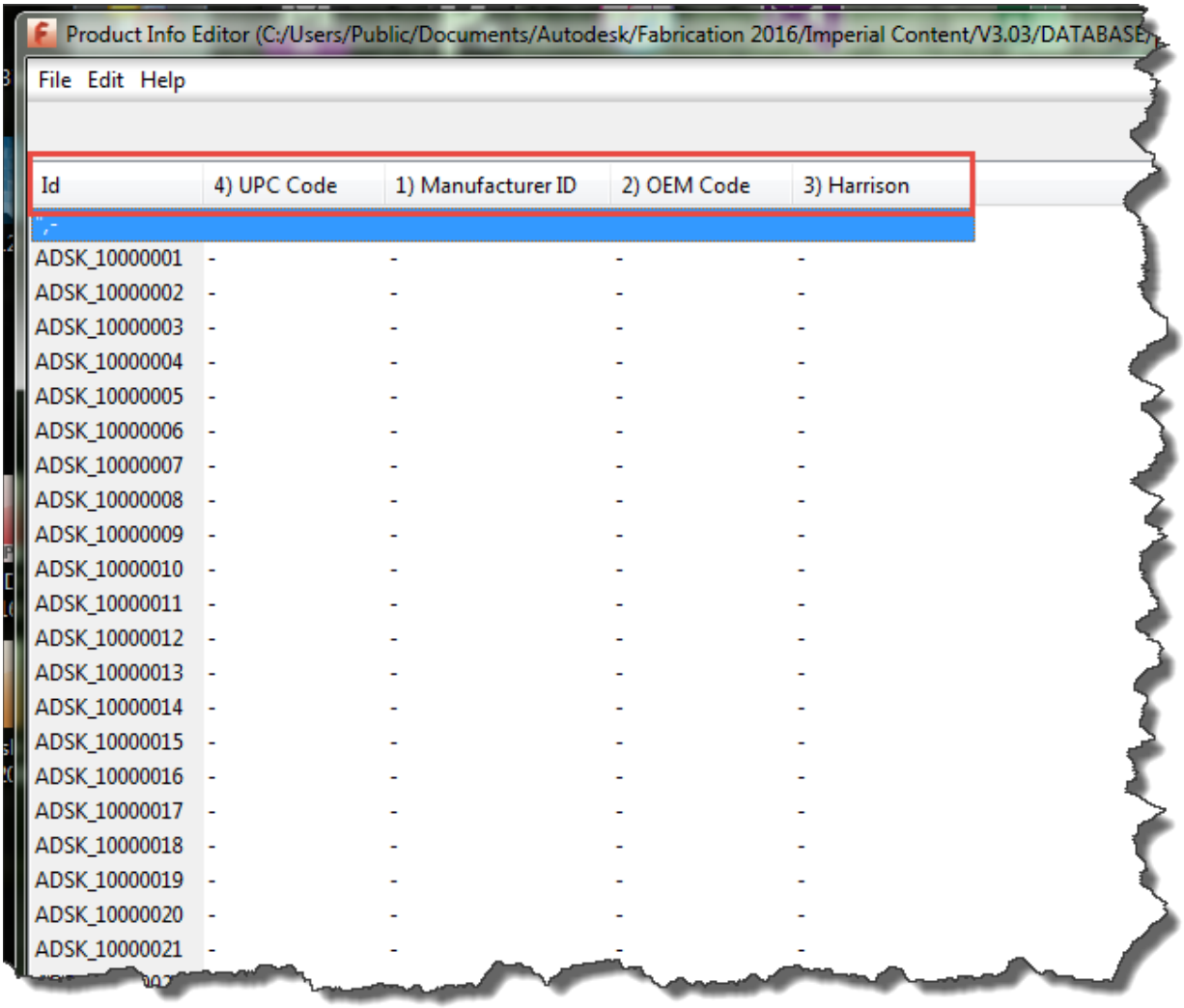



FIGURE 16: IMAGE OF SUPPLIERS IN MAPPROD

## 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

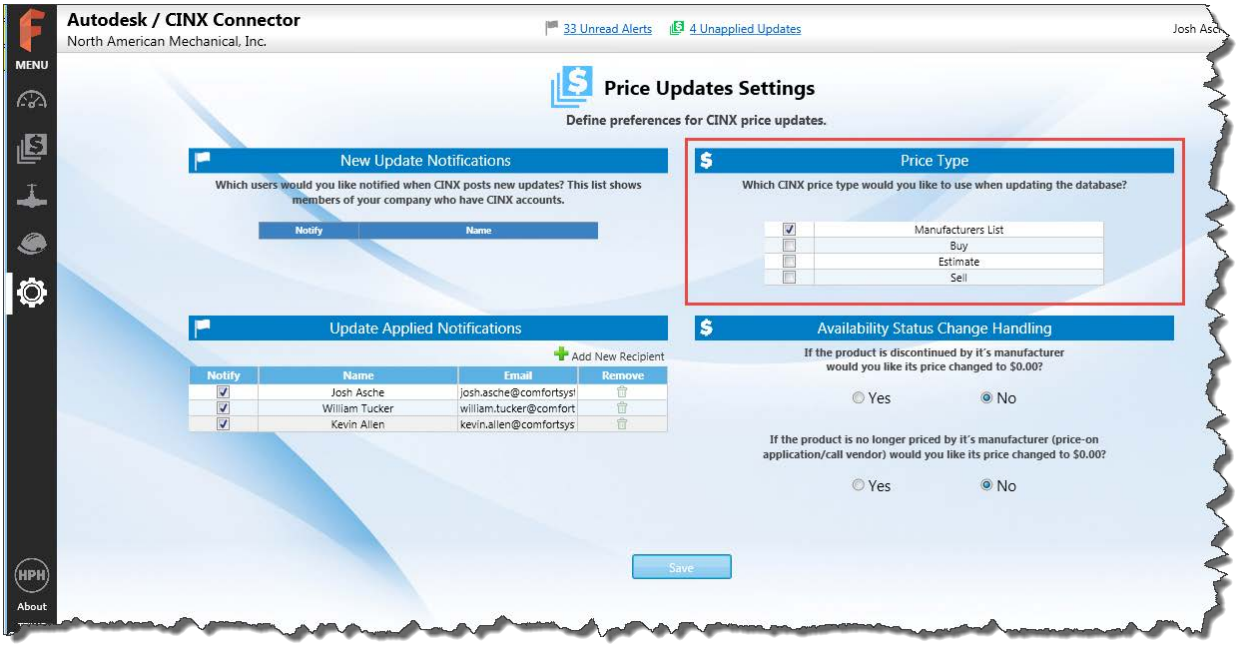



FIGURE 18: IMAGE OF PRICE TYPE OPTIONS IN CINX

**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.**

**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.**

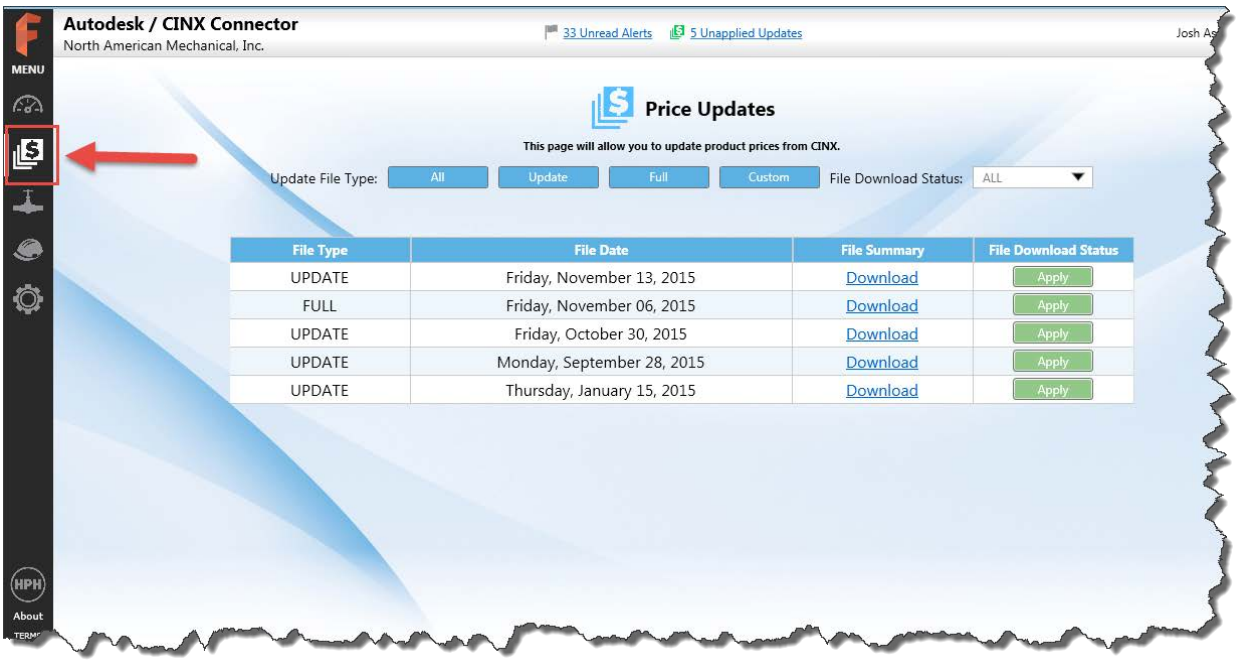



FIGURE 19: IMAGE OF PRICE UPDATE SCREEN IN CINX ADD-IN

**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.**

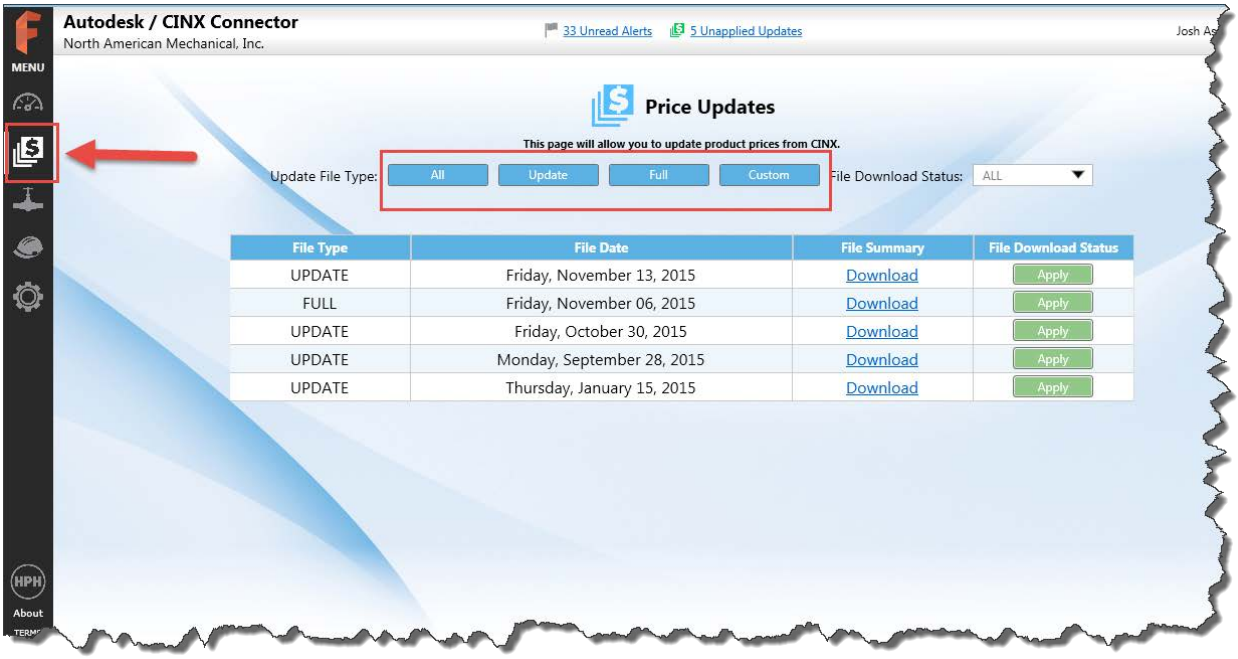



FIGURE 20: IMAGE OF UPDATE FILE TYPE BUTTON FILTERS

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

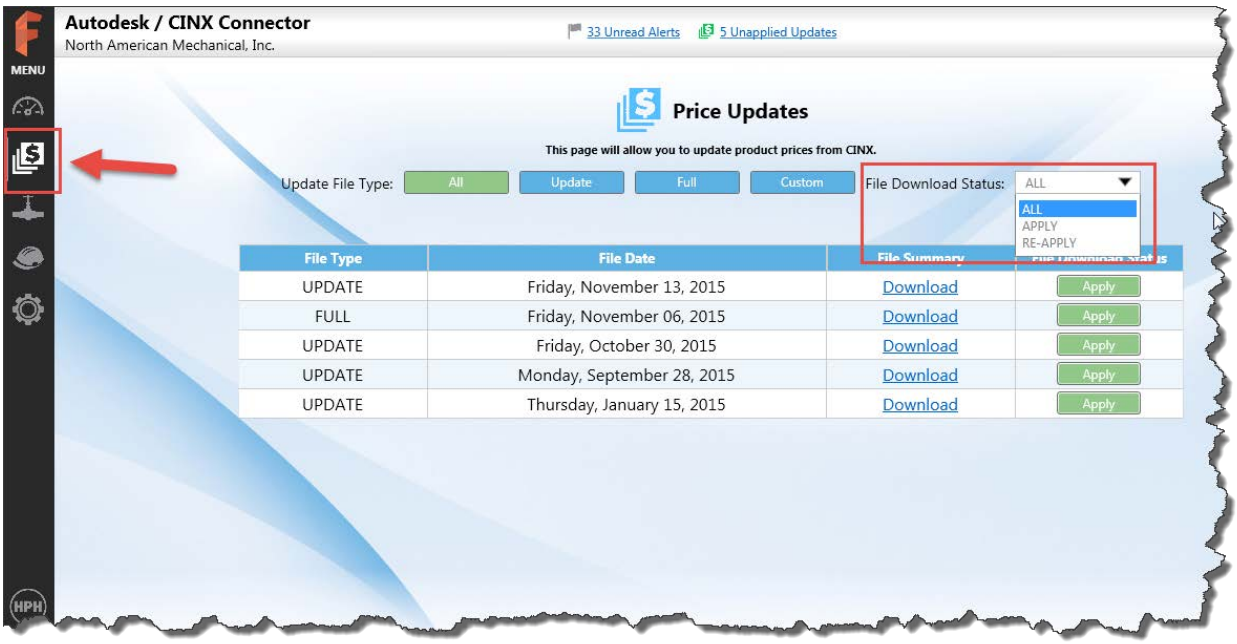



FIGURE 21: IMAGE OF FILE DOWNLOAD STATUS FILTER OPTIONS

**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.**

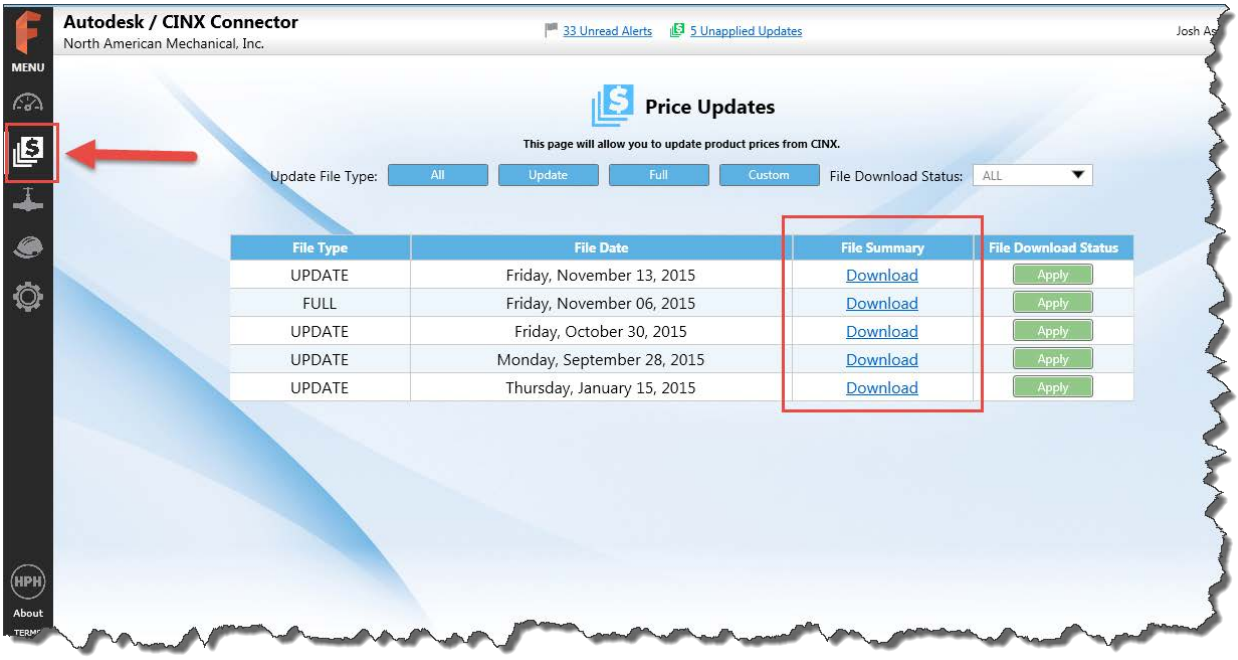
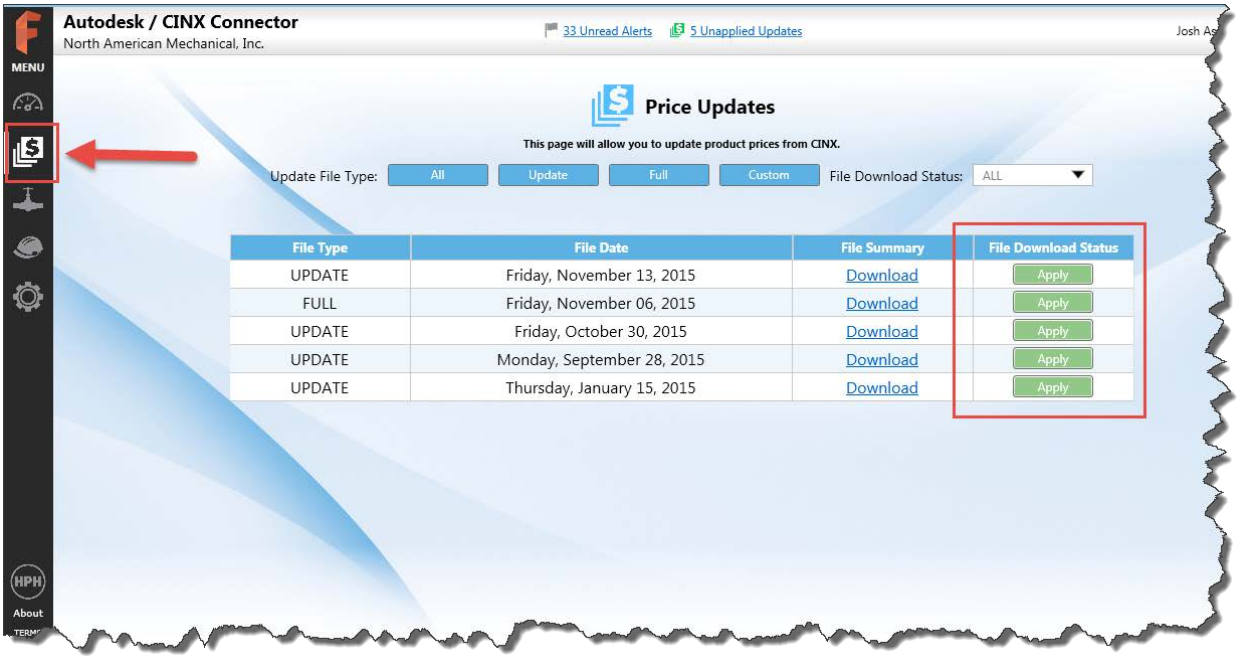



FIGURE 22: IMAGE OF FILE SUMMARY DOWNLOAD OPTION



**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.**

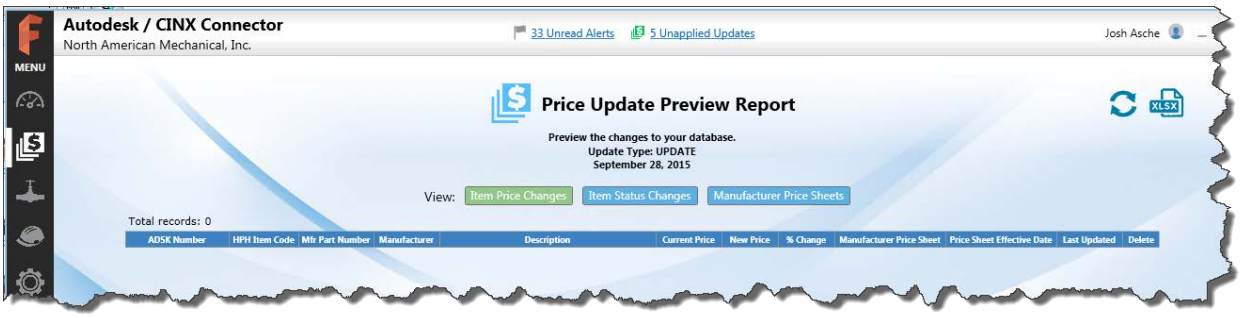



FIGURE 24: IMAGE OF PRICE UPDATE PREVIEW REPORT

**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.**

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