



SMARTBIM

Design Manager User Guide

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Getting Started

I.Design Manager Registration

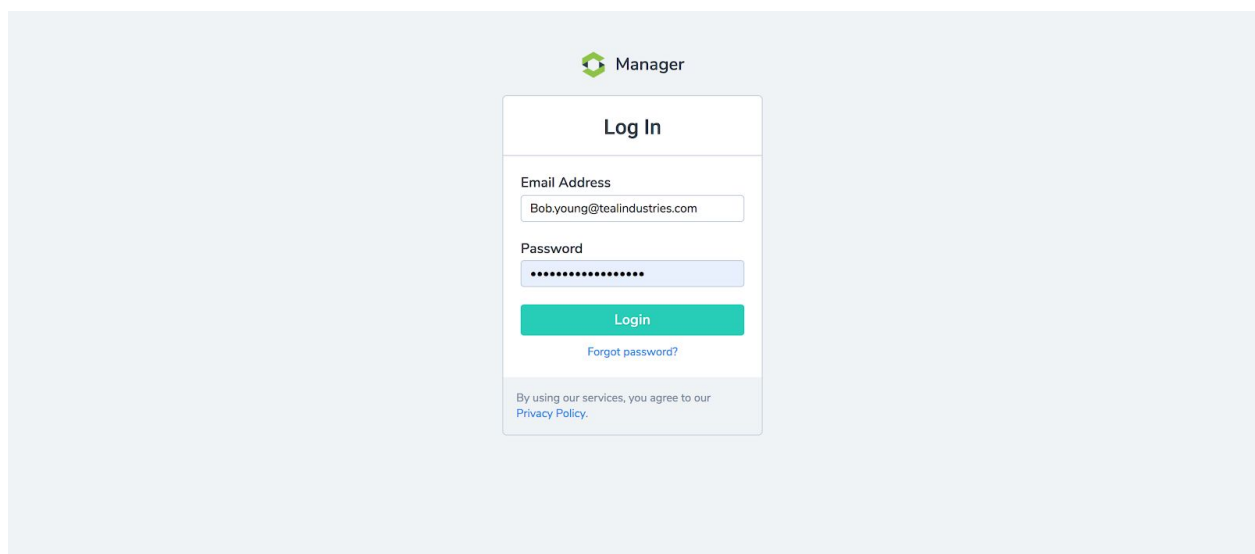
- Each user for the SmartBIM Design Manager will receive their login information after purchasing a license to use the SmartBIM Design Manager from our Account Management Team. Your login information will include your email (company email) and a password (picked by SmartBIM, but can be reset immediately upon signing in for the first time).

II. Design Manager URL

- Along with receiving your Registration information, you will also receive the link to your Design Manager.

III. Accessing Design Manager

- Upon entering your Design Manager URL, you will be taken to the Design Manager login page. Simply enter your email and the password that was sent to you by the Account Management Team.



The screenshot shows a web browser window with a light blue background. At the top center, there is a green circular icon with a white 'S' and the word 'Manager' next to it. Below this, there is a white rectangular box with a thin gray border. Inside this box, the title 'Log In' is centered at the top. Below the title, there are two input fields. The first is labeled 'Email Address' and contains the text 'Bob.young@tealindustries.com'. The second is labeled 'Password' and contains a series of dots. Below these fields is a green button with the text 'Login' in white. Underneath the button is a link that says 'Forgot password?'. At the bottom of the box, there is a small line of text that reads 'By using our services, you agree to our Privacy Policy.' with 'Privacy Policy' as a link.

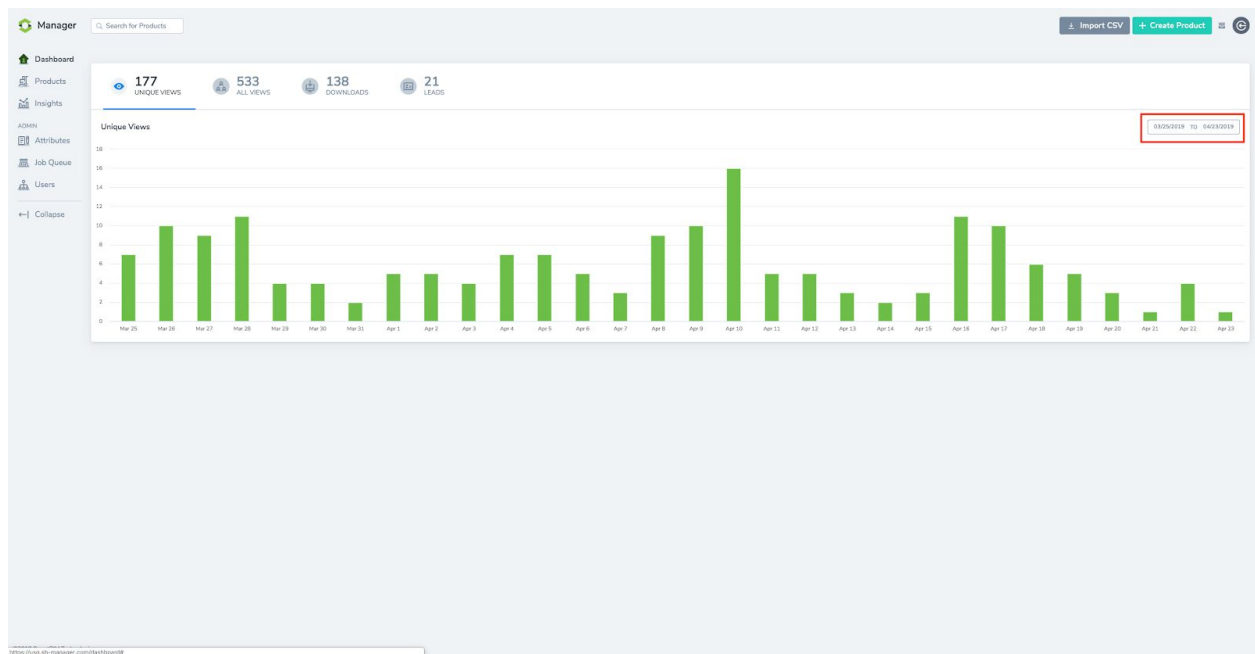
MANAGER PAGES

I. Analytics Dashboard

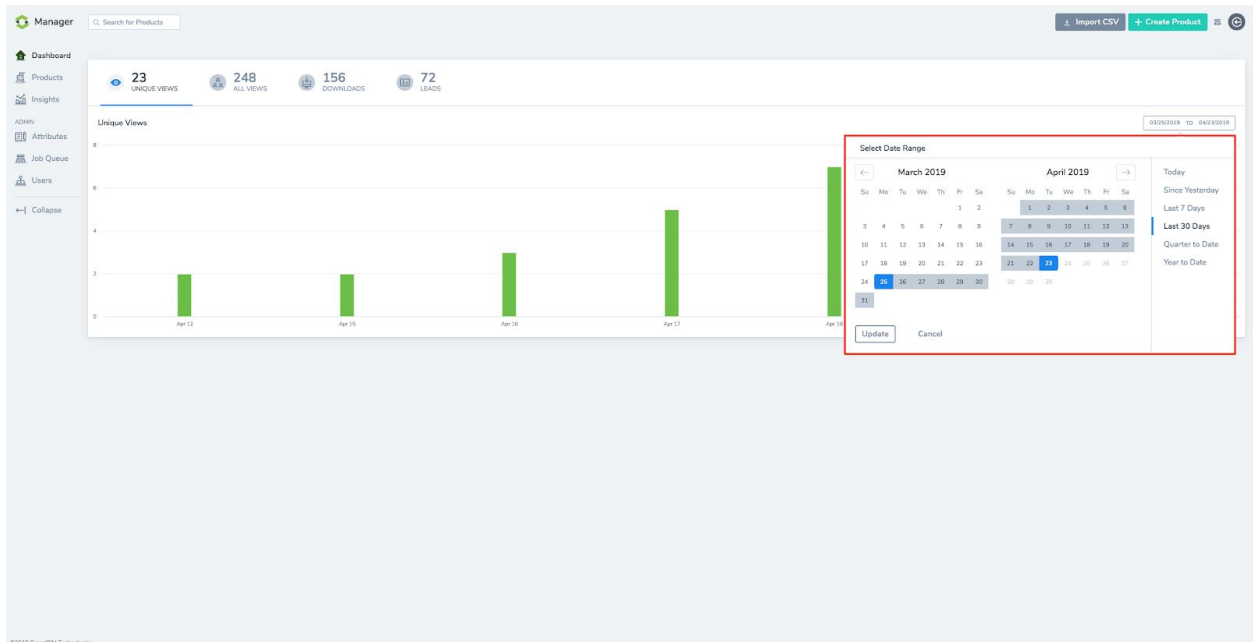
Overview

- Upon successfully logging in, the user will be taken to the Analytics Dashboard which displays information relating to how AEC users have interacted with your products that is represented in a bar graph.
- For any data to populate here, there needs to be products that have been uploaded to the manager and published to the Design Studio (which is where AEC users go to access/download your products).
- In some instances, the SmartBIM Product Team will have already uploaded your products before you have even accessed the Manager and published them to the Design Studio. If that's the case, then there is a good chance that you may already have some analytics information to peruse in this section and on the Insights page.

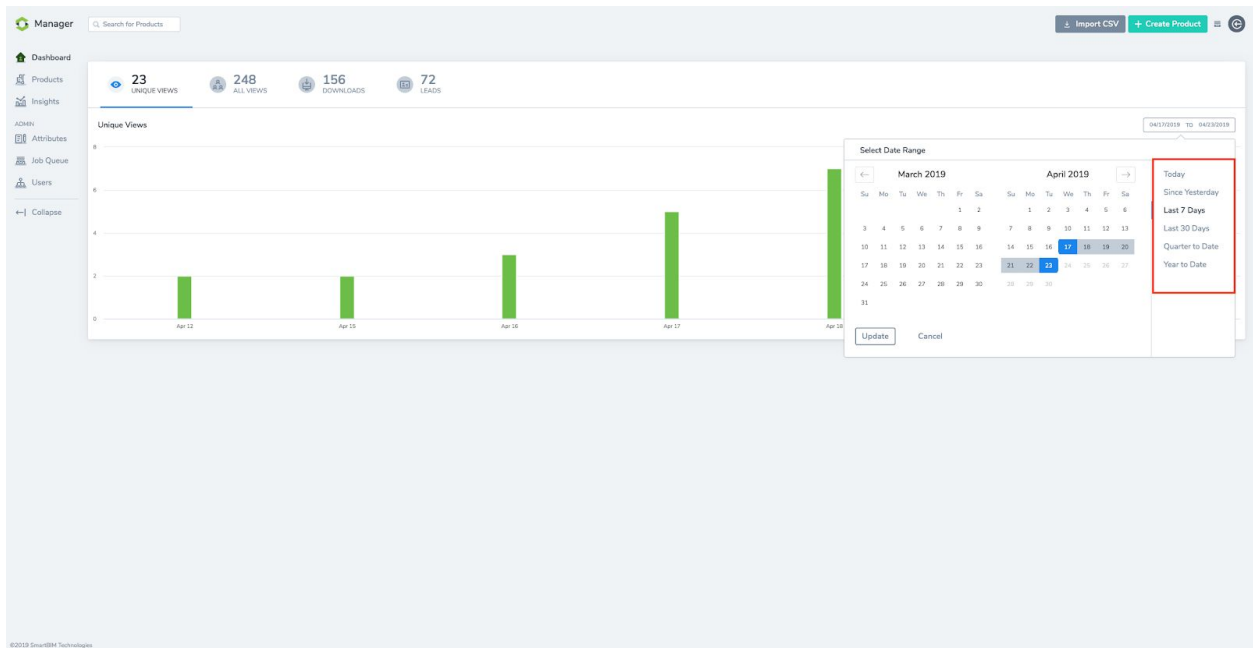
Date Picker- Overview and Selecting Predetermined Date Ranges



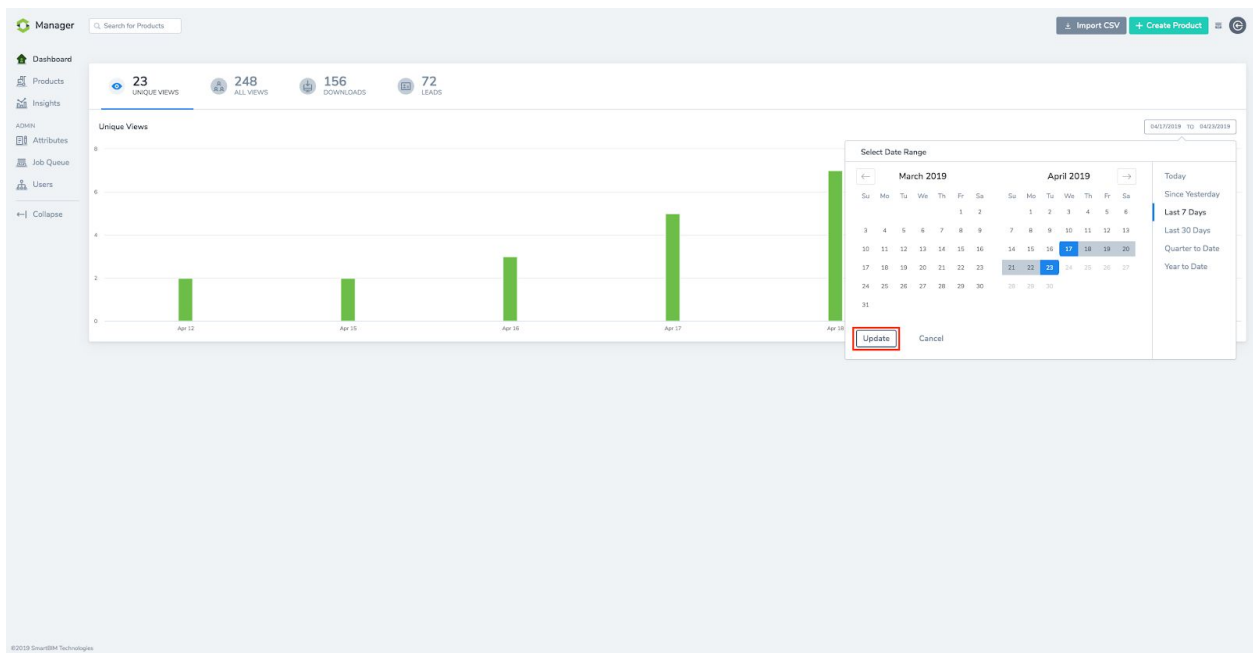
- The date picker is a key component of displaying analytics related user data. It is located in the top right hand corner of the Dashboard Table. The dates selected in the date picker will filter the data presented in the dashboard to the specified timeline in which AEC users interacted with your products within the timeline.
- To change the timeline of the date picker, click anywhere on the datepicker itself to display the Date Picker's selection menu.



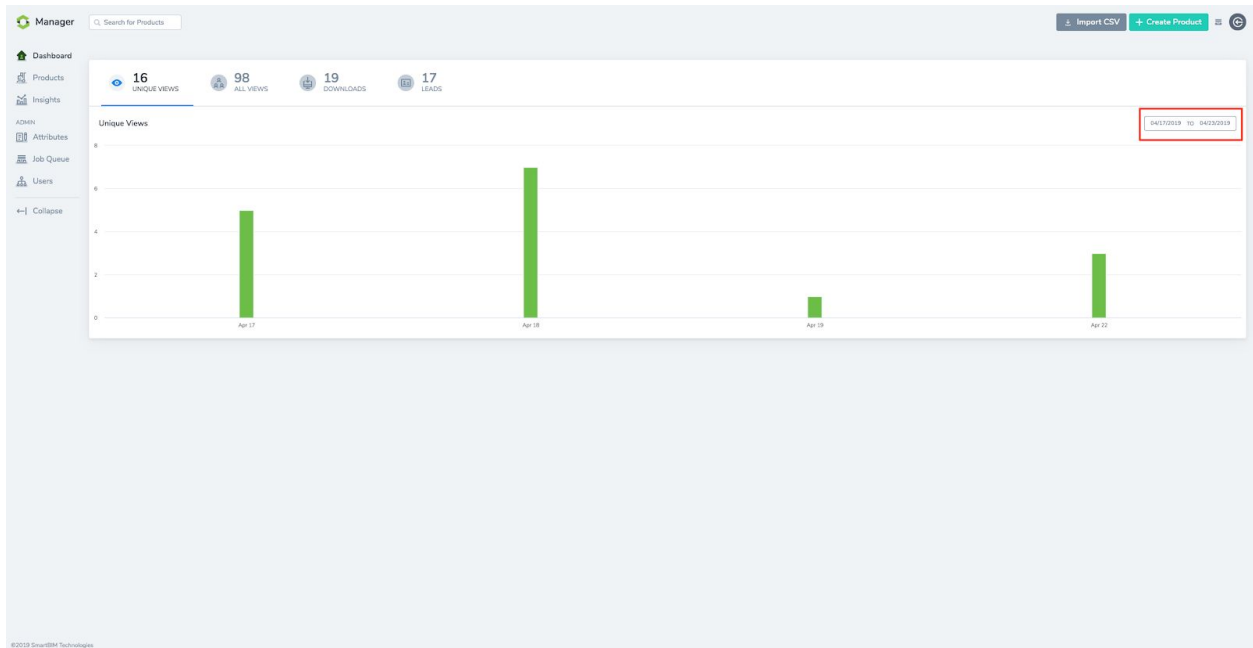
- By default, the date picker is set to display information recorded over the last 30 days.
- To display information via one of our predetermined dates that includes:
 - Today
 - Since Yesterday
 - Last 7 Days
 - Last 30 Days
 - Quarter to Date
 - Year to Date
- Select one of predetermined options.



- Click the update button.

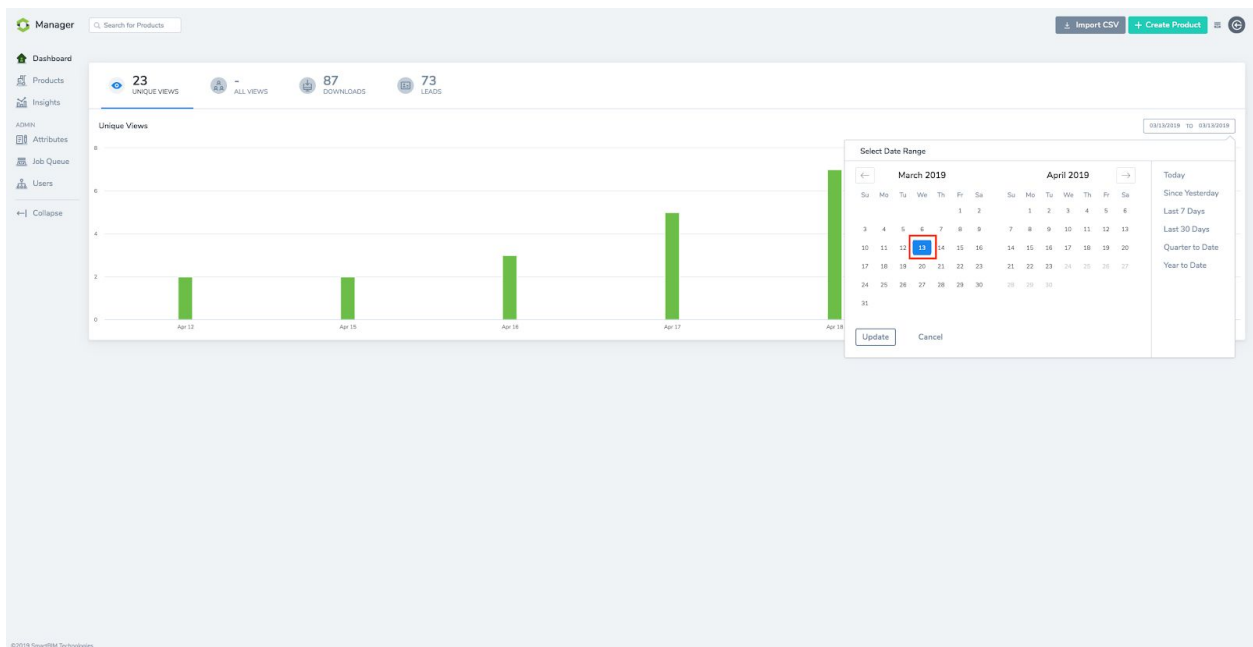


- In the example here, we selected the last seven days, so now the Dashboard will present actions that occurred over the last seven days only.
- This is indicated by the date change in the upper right hand corner which now indicates that we are seeing data from 4/17-4/23 which constitutes seven days as specified.

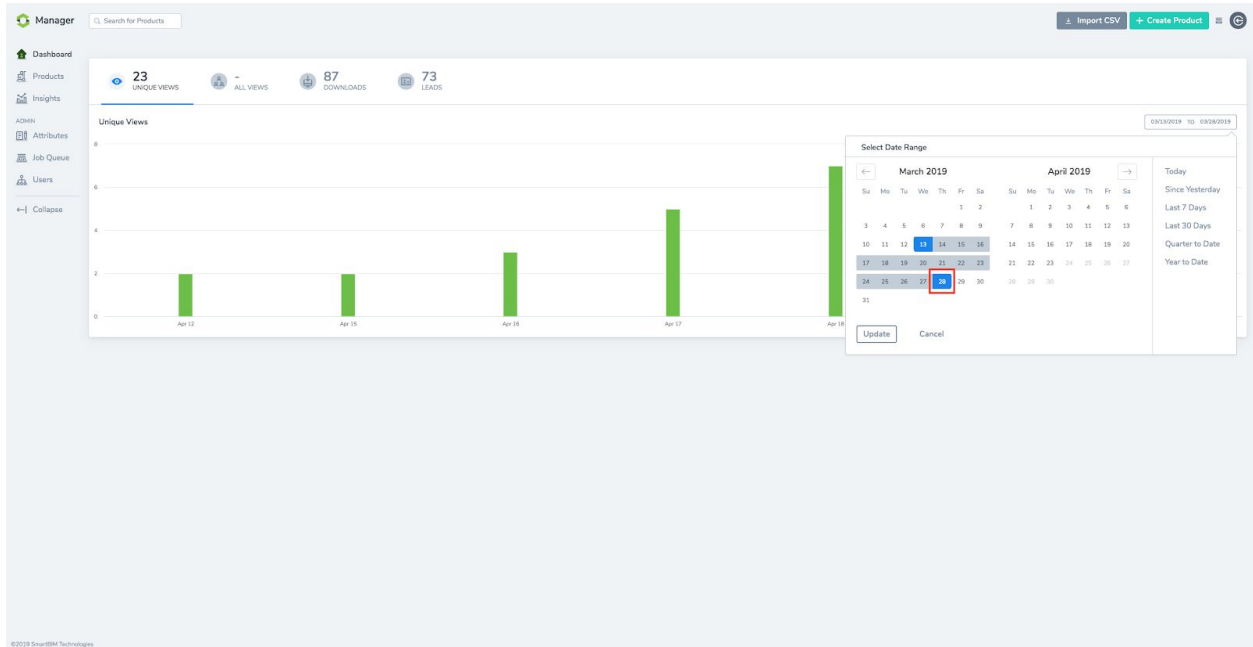


Date Picker- Selecting Specific Date Ranges

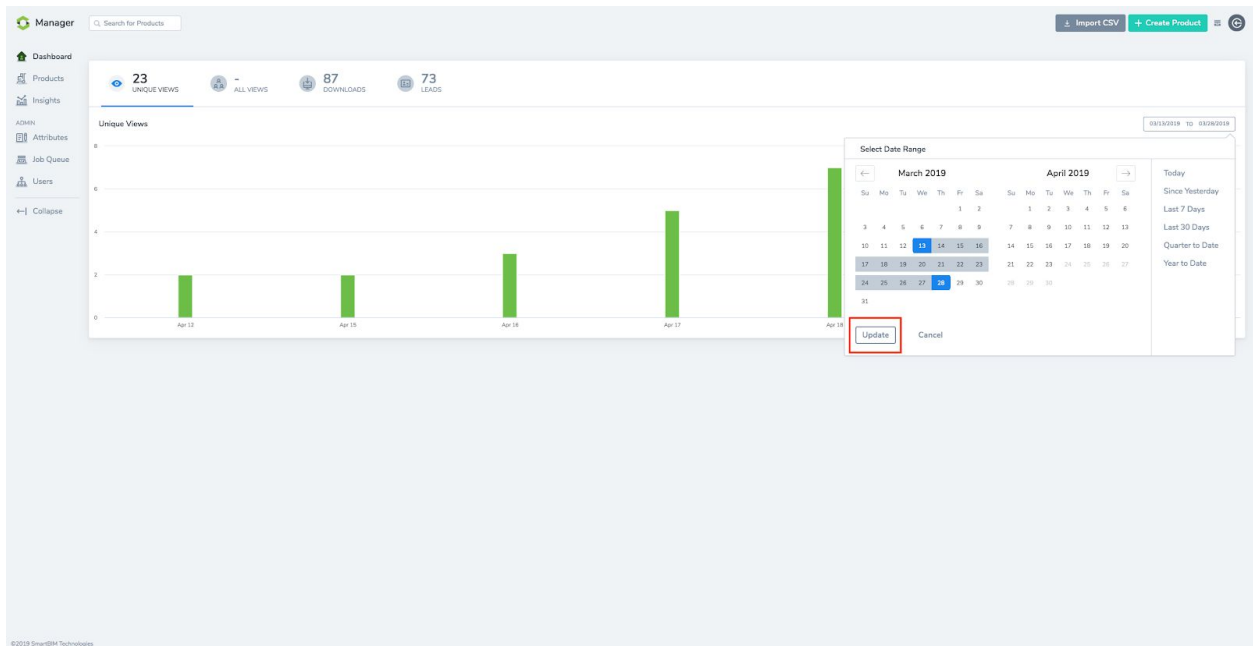
- If none of the predetermined date ranges suffice, you can select the dates that you specifically want to see via the calendar.
- First, select when you want the date range to begin by selecting a date in the calendar.



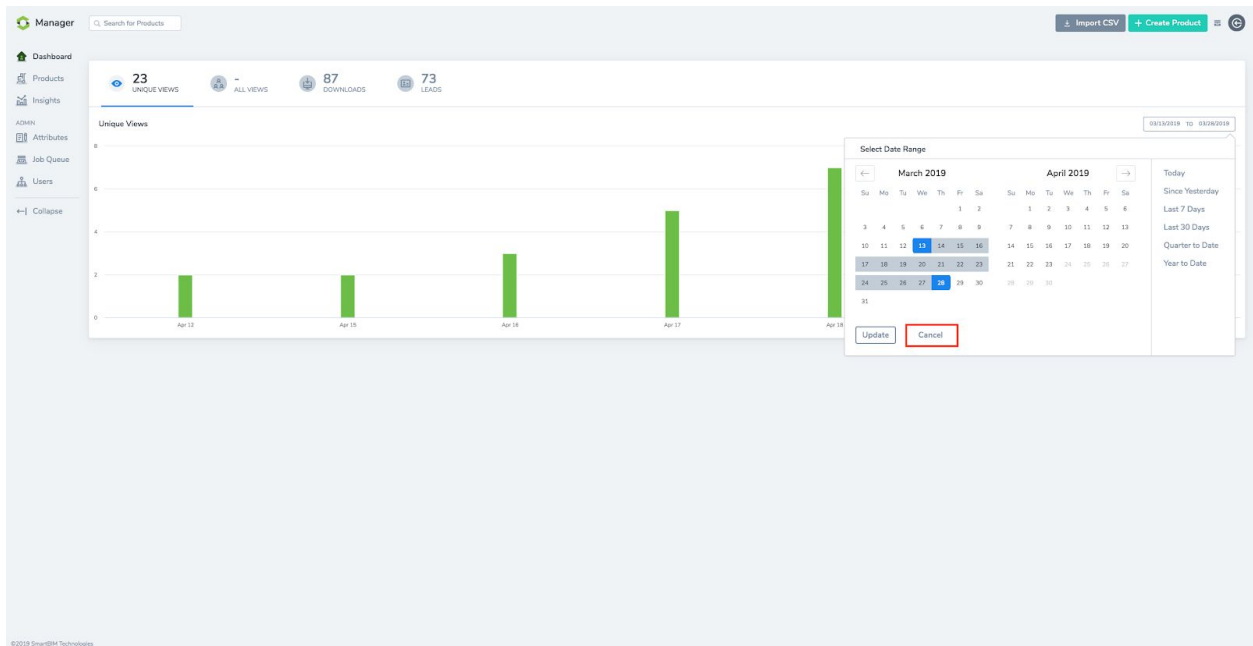
- Second, select when you want the date range to begin by selecting a date that is after the date that begins the date range (e.g. if your date range begins on the 5th day of May, select any day that is after the 5th day of May to create a valid date range).



- When the date picker is selected, you will see data over the last 30 days and two months will be displayed. To find dates that aren't currently present, press the forward or back arrows that will take you ahead and backwards on the calendar respectively.
- Once you have selected your dates, click the Update button and your data will now be filtered by that date.

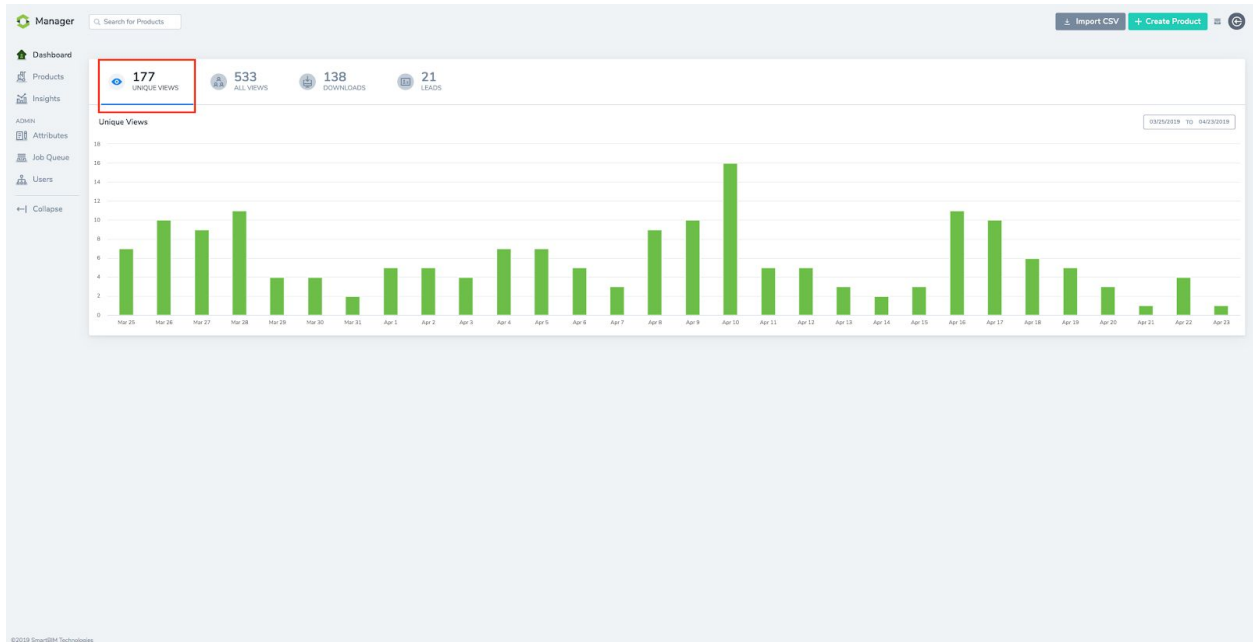


- To cancel a selection in the date picker, click the cancel button. This will cancel the updates you have made in the date picker (if applicable).

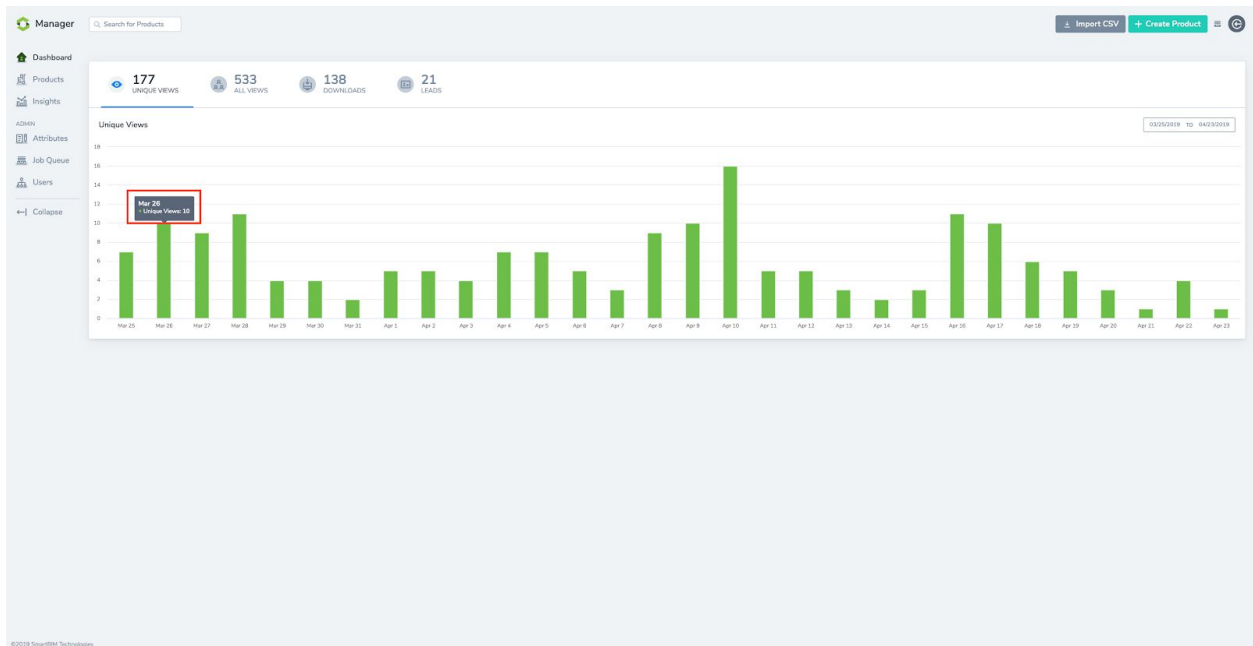


Unique Views

- Unique views shows the amount of individual AEC users who have accessed your products over the period of time defined by the date picker.
- This data is displayed by default.

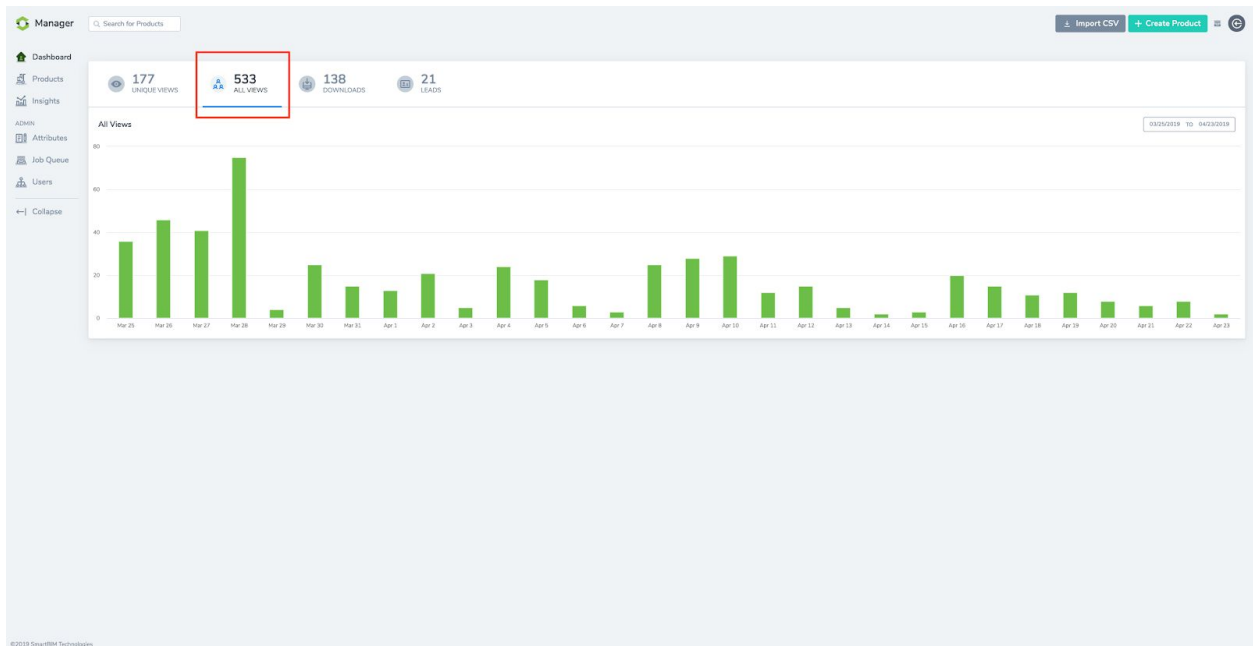


- The bar graph will show data in the days specified by the date picker. Hovering over a day's individual graph will cause a tooltip to appear displaying the exact number of unique views that occurred on the day in question.

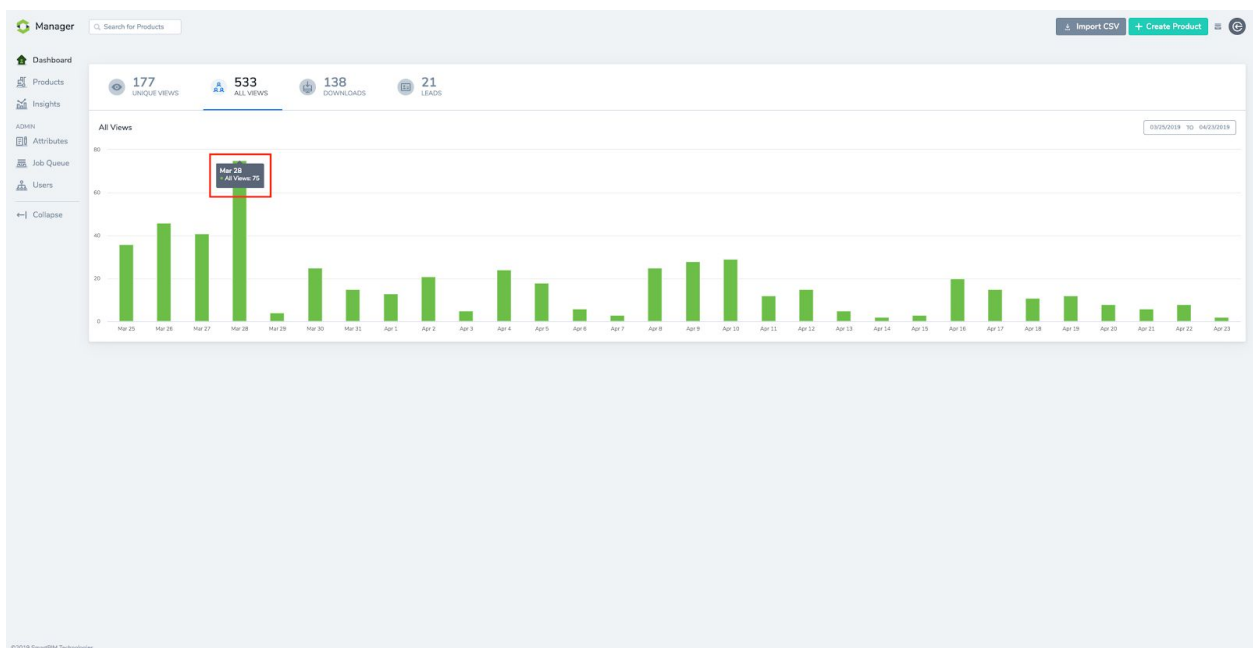


All Views

- All views is the measure that shows the total number of product views within a certain time period as dictated by the date picker. This includes individual users viewing multiple products (e.g. one user clicking on two different products would constitute two product views which would factor into the “All Views” number displayed on the dashboard).
- To see this data, click on the All Views text or icon.



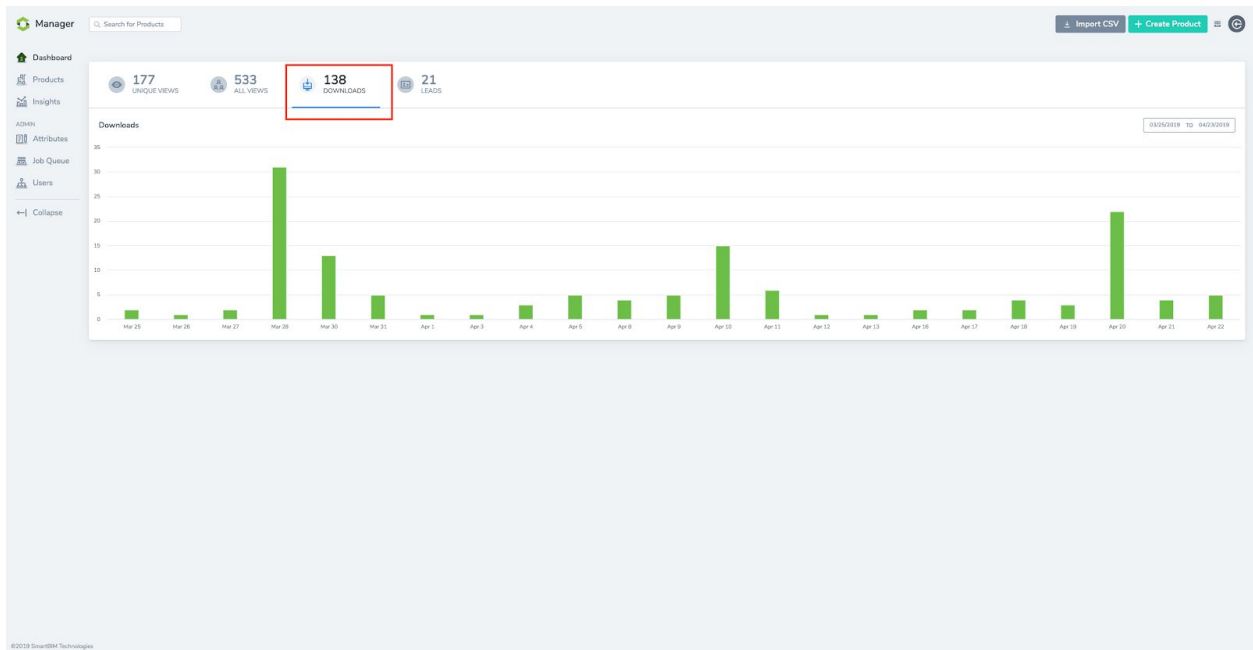
- The bar graph will show data in the days specified by the date picker. Hovering over a day's individual bar graph will cause a tooltip to appear displaying the exact number of views that occurred on the day in question.



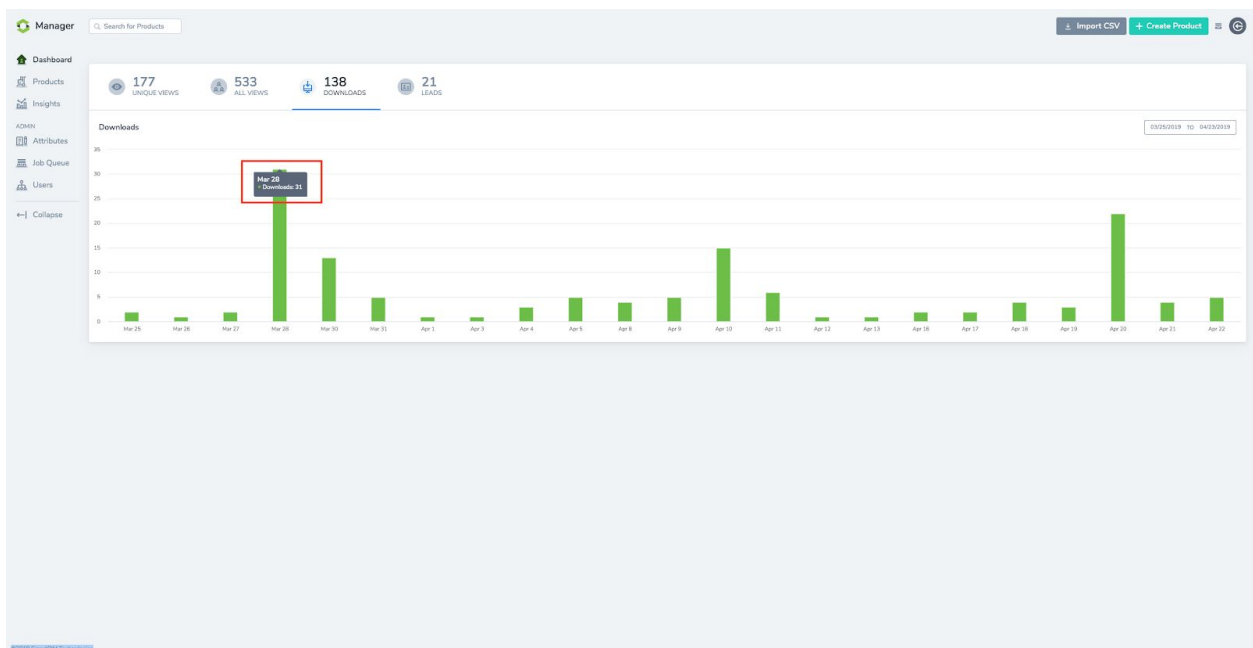
Downloads

- Downloads shows the total number of file attachments that have been downloaded within a certain time period as dictated by the date picker.

- To see this data, click on the “Downloads” text or icon.



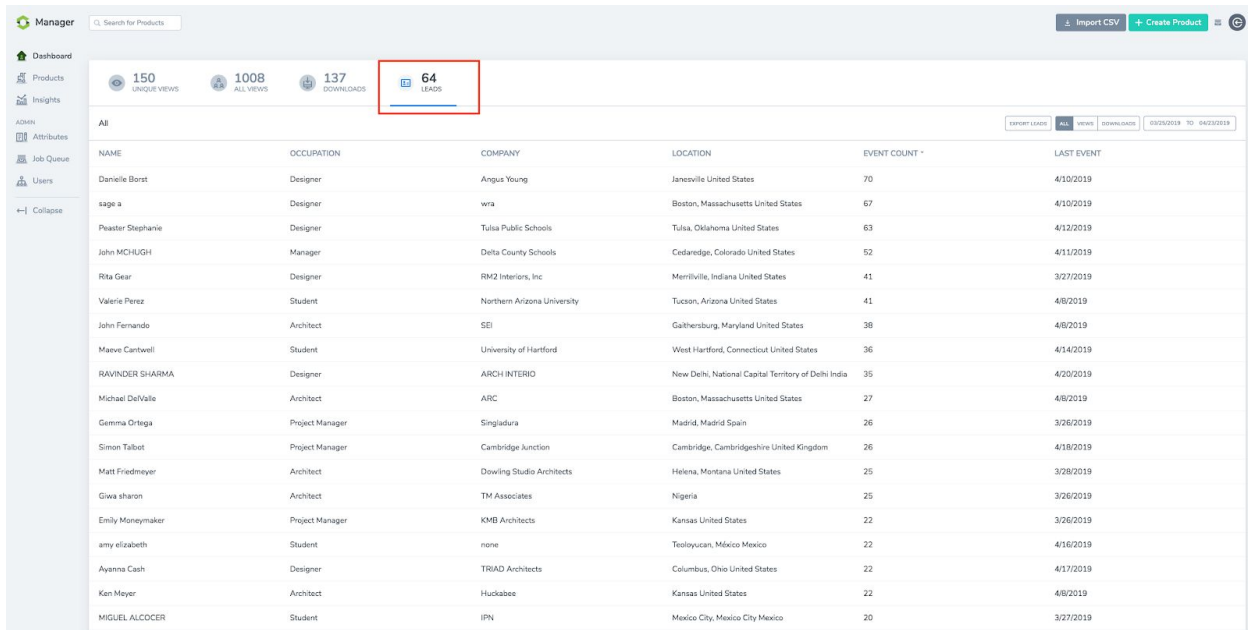
- The bar graph will show data in the days specified by the date picker. Hovering over a day's individual graph will cause a tooltip to appear displaying the exact number of downloads that occurred on the day in question.



Leads

The Leads page shows the AEC users who have accessed your products from the Design Studio and includes the following information about each of them:

- Name
 - Occupation
 - Company
 - Location
 - Event Count (the total actions the user has performed when perusing/downloading your products)
 - Last Event (the last time the user accessed your Design Studio and performed an event)
- To see this data, click on the Leads text or icon.



NAME	OCCUPATION	COMPANY	LOCATION	EVENT COUNT	LAST EVENT
Danielle Borst	Designer	Angus Young	Janesville United States	70	4/10/2019
sage a	Designer	wria	Boston, Massachusetts United States	67	4/10/2019
Peaster Stephanie	Designer	Tulsa Public Schools	Tulsa, Oklahoma United States	63	4/12/2019
John MCHUGH	Manager	Delta County Schools	Cedaredge, Colorado United States	52	4/11/2019
Rita Gear	Designer	RM2 Interiors, Inc	Merrillville, Indiana United States	41	3/27/2019
Valerie Perez	Student	Northern Arizona University	Tucson, Arizona United States	41	4/8/2019
John Fernando	Architect	SEI	Gaithersburg, Maryland United States	38	4/8/2019
Maevre Cantwell	Student	University of Hartford	West Hartford, Connecticut United States	36	4/14/2019
RAVINDER SHARMA	Designer	ARCH INTERIO	New Delhi, National Capital Territory of Delhi India	35	4/20/2019
Michael DeVille	Architect	ARC	Boston, Massachusetts United States	27	4/8/2019
Gemma Ortega	Project Manager	Singladura	Madrid, Madrid Spain	26	3/26/2019
Simon Talbot	Project Manager	Cambridge Junction	Cambridge, Cambridgeshire United Kingdom	26	4/18/2019
Matt Friedmeyer	Architect	Dowling Studio Architects	Helena, Montana United States	25	3/28/2019
Gwra sharon	Architect	TM Associates	Nigeria	25	3/26/2019
Emily Moneymaker	Project Manager	KMB Architects	Kansas United States	22	3/26/2019
amy elizabeth	Student	none	Teoloyucan, México Mexico	22	4/16/2019
Ayanna Cash	Designer	TRIAD Architects	Columbus, Ohio United States	22	4/17/2019
Kan Meyer	Architect	Huckabee	Kansas United States	22	4/8/2019
MIGUEL ALCOCER	Student	IPN	Mexico City, Mexico City Mexico	20	3/27/2019

- The leads section also contains the date picker which works exactly the same way as it does in the other sections. It will filter leads by the timeline you specify.

Sorting

- The leads list is first ordered by the users who have accrued the most events on your Design Studio over the last 30 days in descending order.
- You can sort by clicking on any of the following headers.
 - Name (sorting A-Z and Z-A)
 - Occupation (Sort by A-Z and Z-A)
 - Company (Sort by A-Z and Z-A)
 - Location (Sort by A-Z and Z-A)
 - Event Count (Sort by highest event count-lowest event count and lowest event count-highest event count)
 - Last Event (Sort by most recent event- oldest event and oldest event-newest event)
- To sort by name for example, you would click on the header, “Name” once and all leads would be sorted by name (First name starting with A-Z). If you were to click on “Name” again, all leads would be sorted by name but the order would be from Z-A.
- The remaining headers follow the same interactive protocol as well (with the exception of event count, because Leads are already sorted by highest event count by default).

Filtering

- You can filter between all events, views and downloads in the leads section. To change the data display from all events to views, click the “Views” button.

Manager Search for Products Import CSV Create Product

Dashboard Products Insights ADMN Attributes Job Queue Users Collapse

44 UNIQUE VIEWS 477 ALL VIEWS 175 DOWNLOADS 11 LEADS

Views EXPORT LEADS ALL VIEWS DOWNLOADS 03/03/2019 TO 04/29/2019

NAME	OCCUPATION	COMPANY	LOCATION	EVENT COUNT	LAST EVENT
Zoltan Toth	Architect	SmartBM	Greenwich, Kansas United States	115	4/26/2019
Graham Waldrop	Executive/Owner	Smartbm Technologies	Atlanta, Georgia United States	104	4/29/2019
Jason Brickell	Anonymous Occupation	Anonymous Company	Alpharetta, Georgia United States	88	4/25/2019
Danmon Newquist	Anonymous Occupation	Anonymous Company	Alpharetta, Indiana United States	56	4/15/2019
Jason Brickell	Architect	Gensler	Alpharetta, Georgia United States	36	4/26/2019
Anne Robinson	Specifier	Westlake Capital	Roswell, Georgia United States	20	4/26/2019
Linh Le	Anonymous Occupation	Anonymous Company	Alpharetta, Georgia United States	6	4/24/2019
shannonstandish@foodplantengineering.com	Anonymous Occupation	Anonymous Company	Cincinnati, Ohio United States	5	4/18/2019
Elisabeth Sutton	Marketing/Sales	Kohler	Alpharetta, Georgia United States	4	4/17/2019
Josef Bel	Operations	SmartBM	Roswell, Georgia United States	3	4/26/2019
Maria Jahn	Marketing/Sales	Kohler	Alpharetta, Georgia United States	3	4/17/2019

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- Leads will now be filtered by most views in descending order.
- To change the data display to downloads, click the “Downloads” button.
- Leads will not be filtered by most downloads in descending order.

Manager Search for Products Import CSV Create Product

Dashboard Products Insights ADMN Attributes Job Queue Users Collapse

44 UNIQUE VIEWS 477 ALL VIEWS 175 DOWNLOADS 51 LEADS

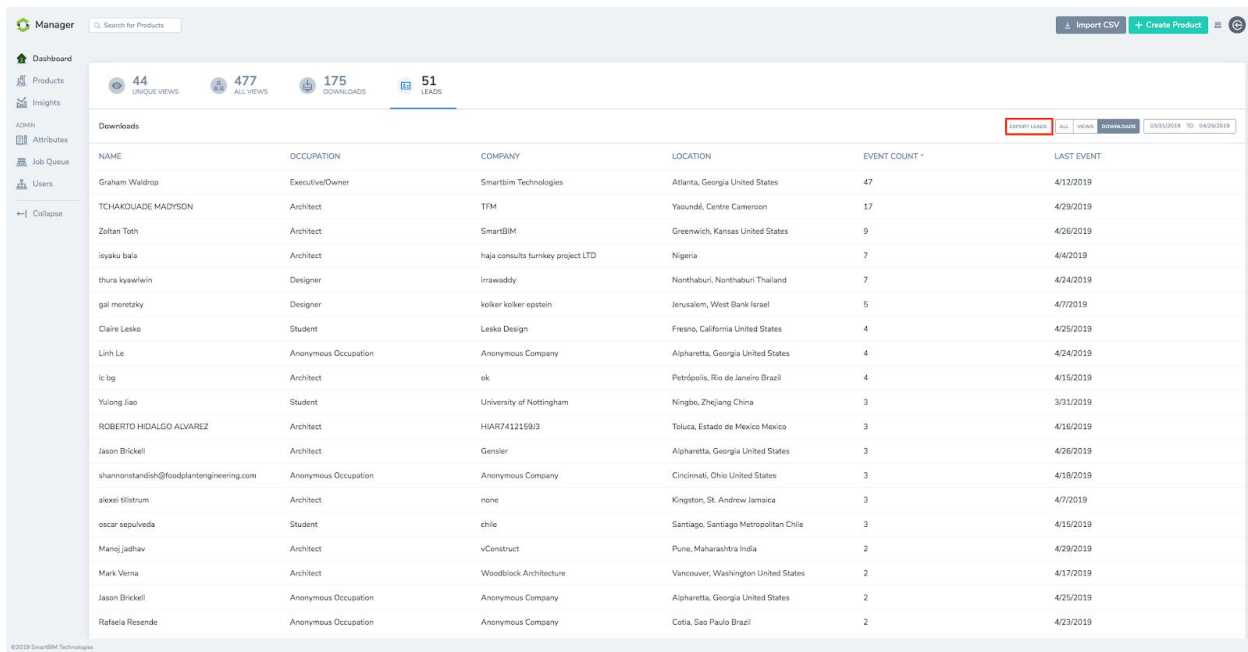
Downloads EXPORT LEADS ALL VIEWS DOWNLOADS 03/03/2019 TO 04/29/2019

NAME	OCCUPATION	COMPANY	LOCATION	EVENT COUNT	LAST EVENT
Graham Waldrop	Executive/Owner	Smartbm Technologies	Atlanta, Georgia United States	47	4/13/2019
TCHAKOUADE MADYSON	Architect	TFM	Yaoundé, Centre Cameroon	17	4/29/2019
Zoltan Toth	Architect	SmartBM	Greenwich, Kansas United States	9	4/26/2019
iyisaku bala	Architect	haja consults turnkey project LTD	Nigeria	7	4/4/2019
thura kyawwin	Designer	irawaddy	Northaburi, Northaburi Thailand	7	4/24/2019
gal moretzky	Designer	kolker kolker epstein	Jerusalem, West Bank Israel	5	4/7/2019
Chaire Lesko	Student	Lesko Design	Fresno, California United States	4	4/25/2019
Linh Le	Anonymous Occupation	Anonymous Company	Alpharetta, Georgia United States	4	4/24/2019
ic log	Architect	ek	Petrópolis, Rio de Janeiro Brazil	4	4/15/2019
Yulong Jiao	Student	University of Nottingham	Ningbo, Zhejiang China	3	3/31/2019
ROBERTO HIDALGO ALVAREZ	Architect	HIAR7412159/3	Toluca, Estado de Mexico Mexico	3	4/16/2019
Jason Brickell	Architect	Gensler	Alpharetta, Georgia United States	3	4/26/2019
shannonstandish@foodplantengineering.com	Anonymous Occupation	Anonymous Company	Cincinnati, Ohio United States	3	4/18/2019
alexei tiftitrum	Architect	none	Kingston, St. Andrew Jamaica	3	4/7/2019
oscar sepulveda	Student	chile	Santiago, Santiago Metropolitan Chile	3	4/15/2019
Manoj jadhav	Architect	vConstruct	Pune, Maharashtra India	2	4/29/2019
Mark Verna	Architect	Woodblock Architecture	Vancouver, Washington United States	2	4/17/2019
Jason Brickell	Anonymous Occupation	Anonymous Company	Alpharetta, Georgia United States	2	4/25/2019
Rafaela Resende	Anonymous Occupation	Anonymous Company	Cotia, Sao Paulo Brazil	2	4/23/2019

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Exporting Leads

- To export your leads data to a .CSV file, click the export leads button. Selecting this button will take into account how you have filtered the timeline from the date picker, whether you have views, downloads or all events selected as well. Whatever you have selected, is what will be exported to the CSV.



NAME	OCCUPATION	COMPANY	LOCATION	EVENT COUNT	LAST EVENT
Graham Waldrop	Executive/Owner	Smartbim Technologies	Atlanta, Georgia United States	47	4/12/2019
TCHAKDUADE MADYSON	Architect	TFM	Yaoundé, Centre Cameroon	17	4/29/2019
Zoltan Toth	Architect	SmartBIM	Greenwich, Kansas United States	9	4/26/2019
isyaku bala	Architect	haja consults turnkey project LTD	Nigeria	7	4/4/2019
thura kyawwin	Designer	inrawaddy	Northaburi, Northaburi Thailand	7	4/24/2019
gal moretzky	Designer	kolker kolker epstein	Jerusalem, West Bank Israel	5	4/7/2019
Claire Lesko	Student	Lesko Design	Fresno, California United States	4	4/25/2019
Linh Le	Anonymous Occupation	Anonymous Company	Alpharetta, Georgia United States	4	4/24/2019
lc bog	Architect	ok	Petrópolis, Rio de Janeiro Brazil	4	4/15/2019
Yulong Jiao	Student	University of Nottingham	Ningbo, Zhejiang China	3	3/31/2019
ROBERTO HIDALGO ALVAREZ	Architect	HIAR74121593	Toluca, Estado de Mexico Mexico	3	4/16/2019
Jason Brickell	Architect	Gensler	Alpharetta, Georgia United States	3	4/26/2019
shannonstandish@foodplantengineering.com	Anonymous Occupation	Anonymous Company	Cincinnati, Ohio United States	3	4/19/2019
alexai tillstrum	Architect	none	Kingston, St. Andrew Jamaica	3	4/7/2019
oscar sepulveda	Student	chile	Santiago, Santiago Metropolitan Chile	3	4/15/2019
Manoj jadhav	Architect	vConstruct	Pune, Maharashtra India	2	4/29/2019
Mark Verna	Architect	Woodblock Architecture	Vancouver, Washington United States	2	4/17/2019
Jason Brickell	Anonymous Occupation	Anonymous Company	Alpharetta, Georgia United States	2	4/25/2019
Rafaela Rosende	Anonymous Occupation	Anonymous Company	Cotia, Sao Paulo Brazil	2	4/23/2019

The leads export will be arranged by the following sections:

- You may click on any of the names in the leads section to access their Leads Profile Page (discussed on insert page number here).

LEADS CSV

The leads CSV has the following headers

- Visitor ID
 - a. A unique ID SmartBIM uses to track users during a session (when they're using the Design Studio without any inactivity for 10 minutes)
- User ID
 - a. A unique ID that is attached to a singular user in order to track their actions.

- First Name
 - a. The user's first name they entered when registering on the Design Studio
- Last Name
 - a. The user's last name they entered when registering on the Design Studio.
- Email
 - a. The user's email they entered when registering on the Design Studio.
- Phone
 - a. The user's phone number they entered when registering on the Design Studio.
 - b. Note: This is an optional data point, so this field may be blank.
- Occupation
 - a. The user's occupation they entered when registering on the Design Studio.
- Company
 - a. The user's company they entered when registering on the Design Studio.
- Industry
 - a. The user's industry they entered when registering on the Design Studio.
- City
 - a. The user's city.
- State
 - a. The user's state.
- Country
 - a. The user's country.
- Site Accessed From
 - a. Did they access your products from the Design Studio, or the Aggregate Library (our legacy product)? This will be stated here.
- Time
 - a. The time in which the user committed the action in question (all actions are displayed in the UTC time zone.)

- Date

- a. The date in which the user committed the action in questions (formatted in mm/dd/yyyy)

- Action

- a. The action that the user took that was recorded in our system.
 - b. Referral- Which site was the user coming from?
 - i. E.g. registration page
 - ii. Google
 - iii. A different product's page
 - c. Download- If the user downloaded a file, the word "download" will be displayed here.
 - d. Search- If the user committed a search action, the word "search" will be displayed. Searching for a product, filtering and accessing a page can constitute searching. If any of these actions are committed, the word "search" will appear to correspond with the user's actions.
 - e. Page view- If the user accesses any page on the Design Studio, this constitutes a page view.
 - f. Product- If the user clicks on the product details page of any product on your design studio, the word "product" will appear to correspond with that action.

- Referral URL

- a. The page the user was on if the action was a Referral. If any other action was committed, this section will be blank.

- Page URL

- a. The URL of the page in which the action was committed by the user.

- Search Query

- a. If the user searched entering data into the search bar on the Design Studio, the actual query will appear in this cell. For all other actions this cell will be blank.

- Product Name

- a. The product name interacted with. If the user is querying anything in the search bar, this cell will be blank.

- Asset Name

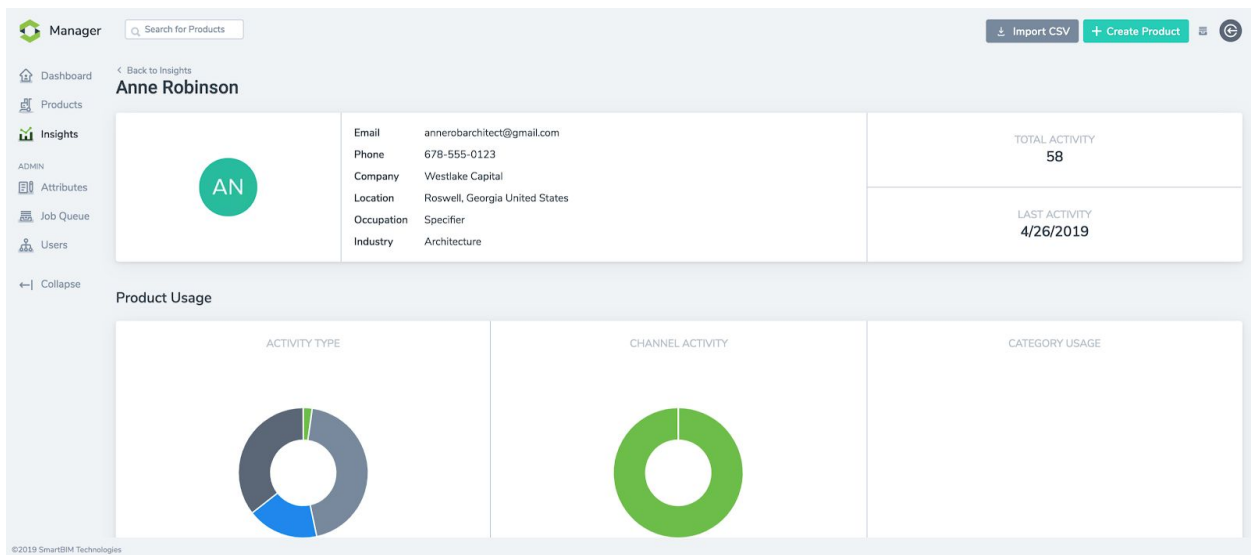
- a. The name of the asset (file attachment or external link) that was downloaded. All other actions will render this cell blank.

- Asset URL

- a. The place where the asset (file attachment or external link) is stored on our system

Leads Profile Page

1. Every user has a leads profile page that displays the core information about the user and their actions that drills deeper down into their tendencies as users.



- This is broken into three sections:

- User Information

- a. Name
 - b. Email address
 - c. Phone number
 - d. Company
 - e. Location
 - f. Occupation
 - g. Industry

- Product Usage

- a. Activity Type- Shows a percentage breakdown of user actions in a donut chart.

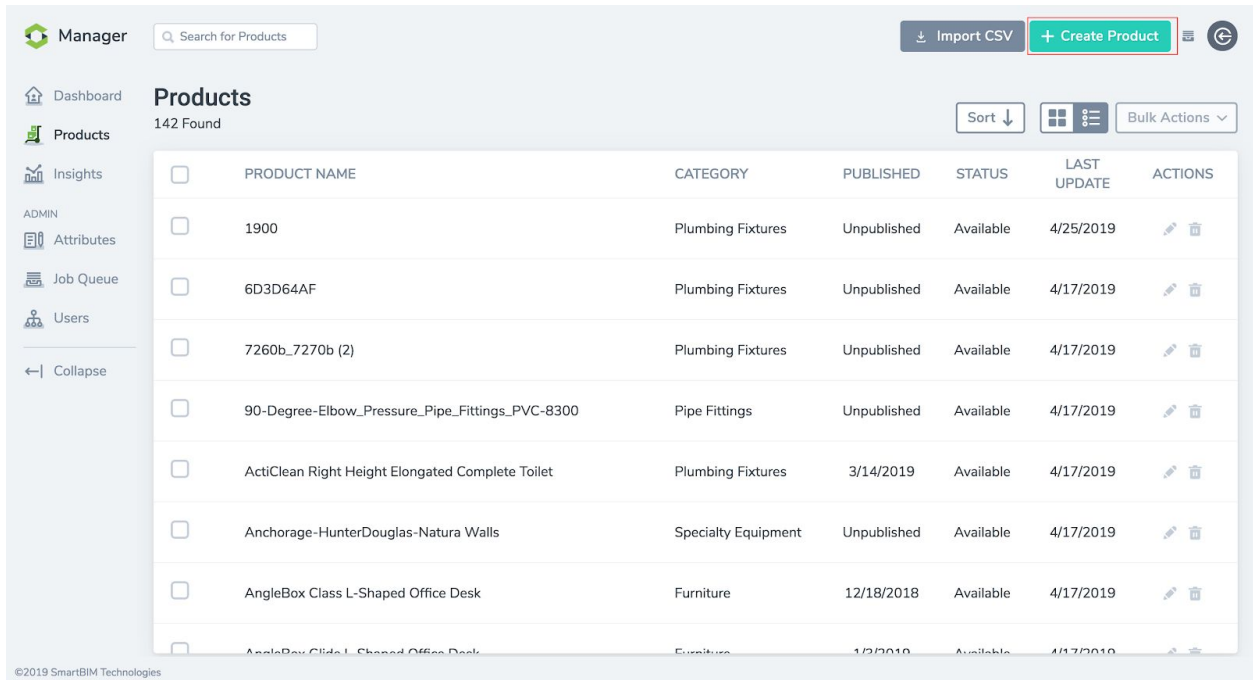
- b. Channel Activity- Shows which site or method the user is accessing your products from or with.
 - c. Category usage- Shows the percentage of products the user interacted from the Design studio by category.
- Activity Log (Coming soon!) - A complete list of actions that a user has taken in relation to all of your products as defined by downloads and product views that shows the exact product that was interacted with, if it was viewed or downloaded and on what date the action took place.
 - a. If a user clicks on the name of the product that was interacted, they will be taken to that product's product details page. This will be covered on (insert page number here).

Creating A Product

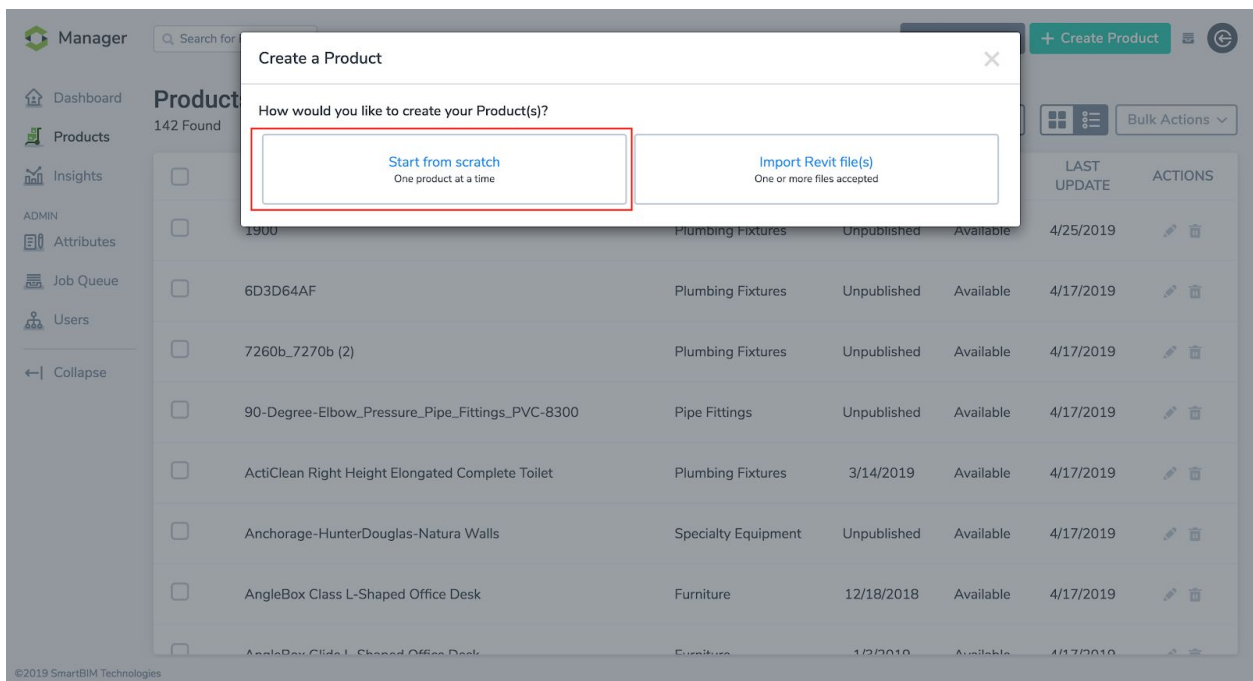
- Creating a product is where the process to create and manage your content begins when using the SmartBIM manager by uploading your digital assets to our system. There are a number of ways to create products individually and by creating multiple products at once.

Creating A “From Scratch” Product- Essential Training

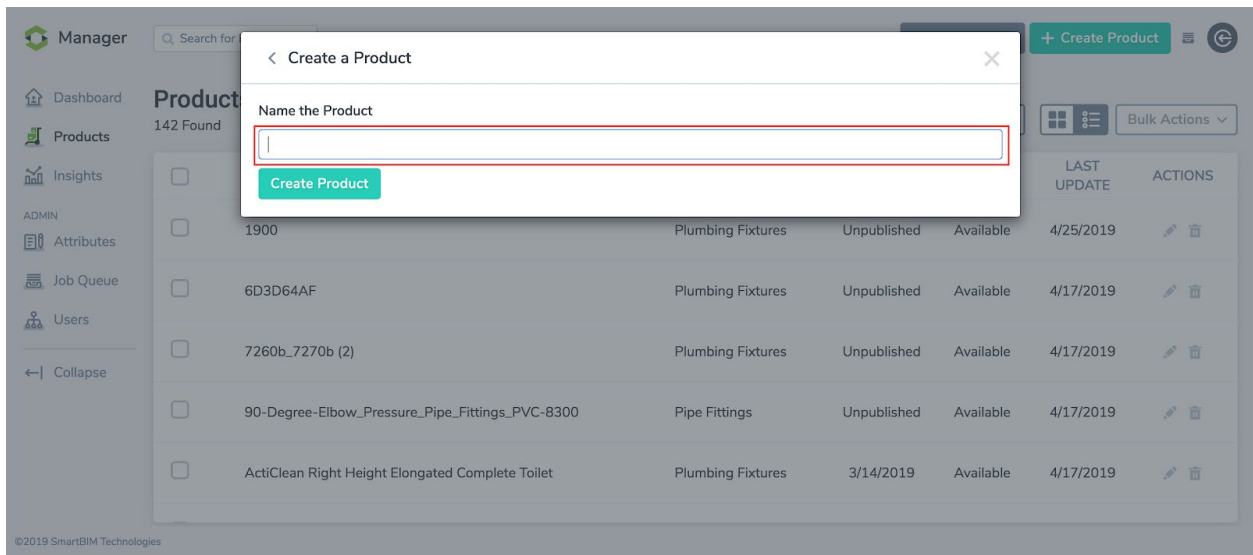
- If you're interested in starting with a completely blank slate when it comes to data, or are interested in testing the Manager's capability before importing your file attachments, creating a product from scratch is a great way to understand the concept of what that actually means.
- We recommend that beginning users follow along with the “Create A From Scratch Product” instructions to get the hang of using the manager at its most basic level.
- To create a product from scratch, click the green “Create Product” button in the top right hand corner of the Manager.



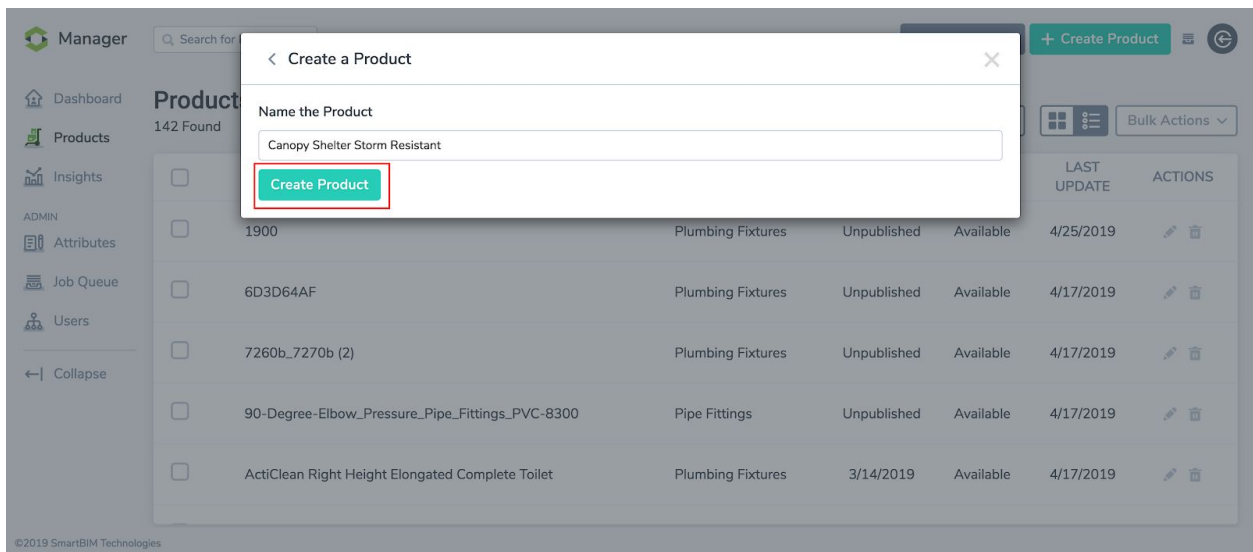
- A modal will appear asking you to select which method you would like to use to create a product. To create a product from scratch, select the option on the left that states, “Start from Scratch”.



- Doing this will allow you to name your product. To do so, click in the text box and name your product whatever you'd like to.

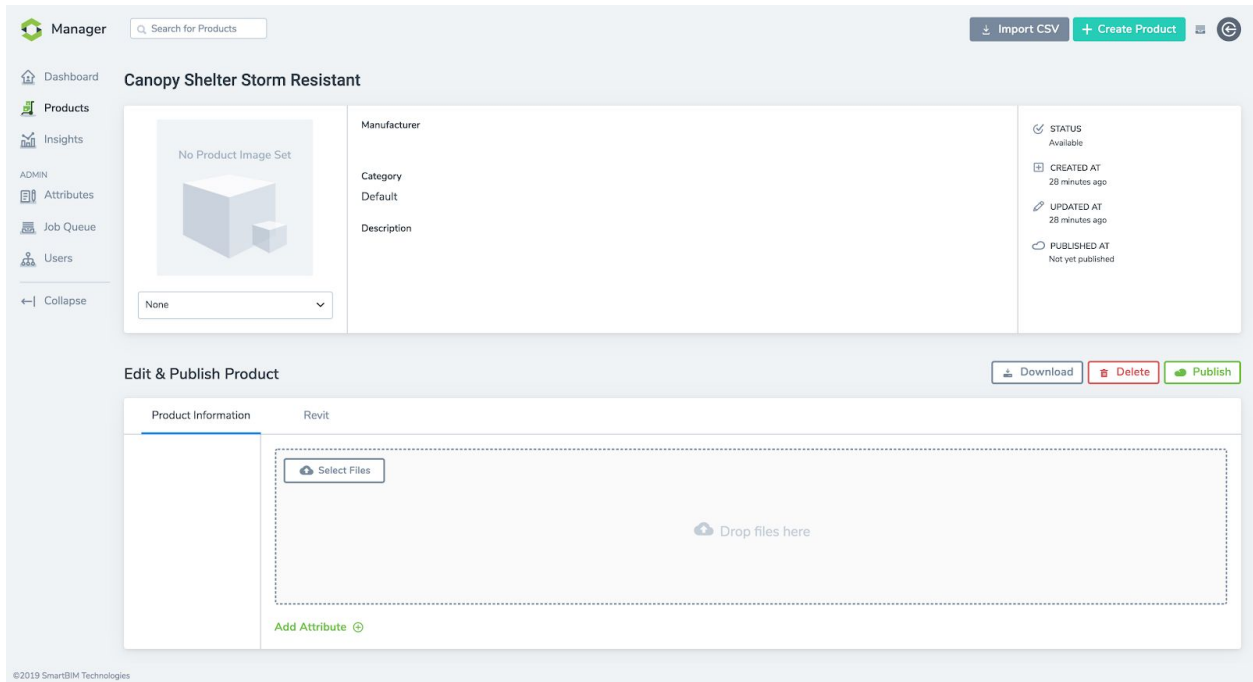


- Once you have named your product, select the green create product button and your product will officially be created and stored in the SmartBIM Design Manager.



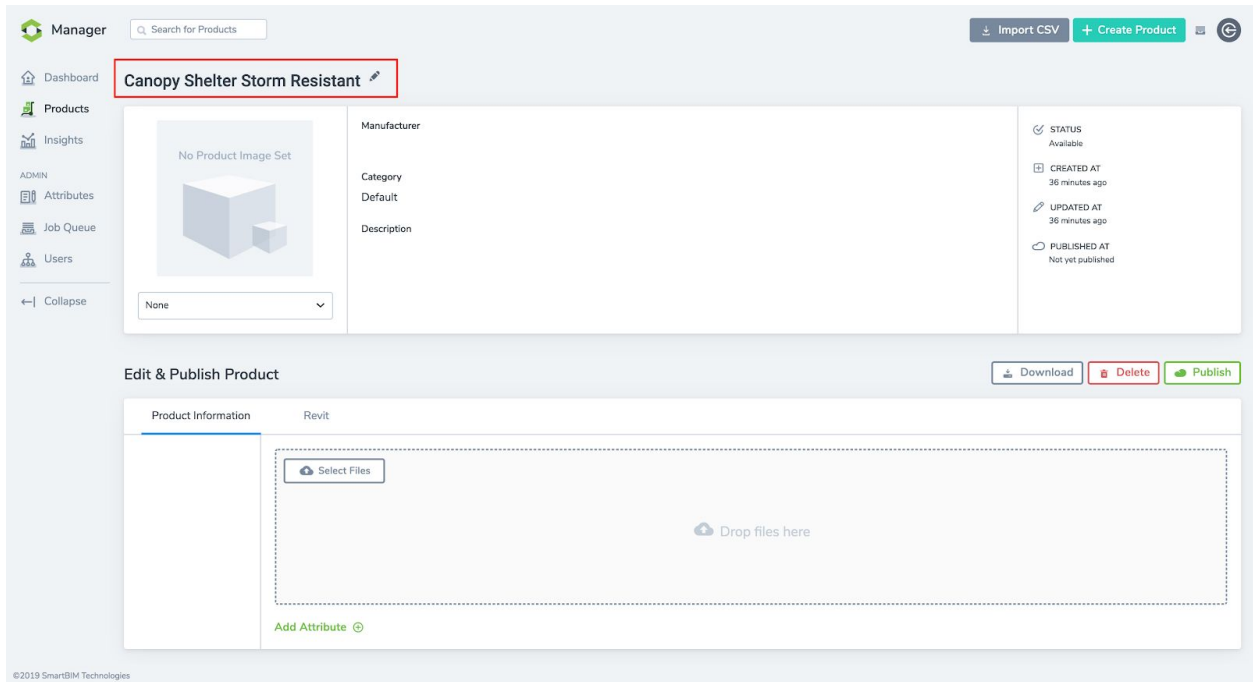
- You will now be taken to your new product's details page. Presently, the only data we will see will be the name of the product as we haven't added any additional data yet.

Product Details Page- Basic Interaction

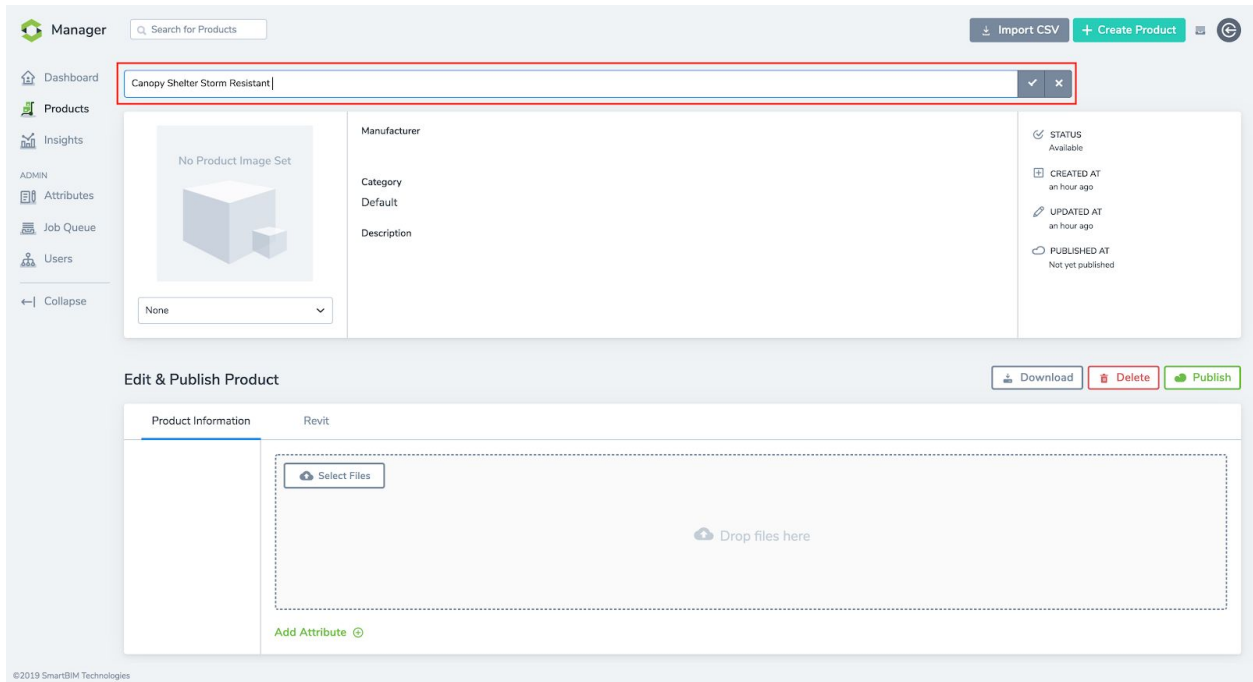


I. Product Name Interaction

- To change the name of the Product, hover your mouse over the name of the product, and you will see a pencil icon. Click the pencil icon or the name of the product itself to allow the product's name to be edited.

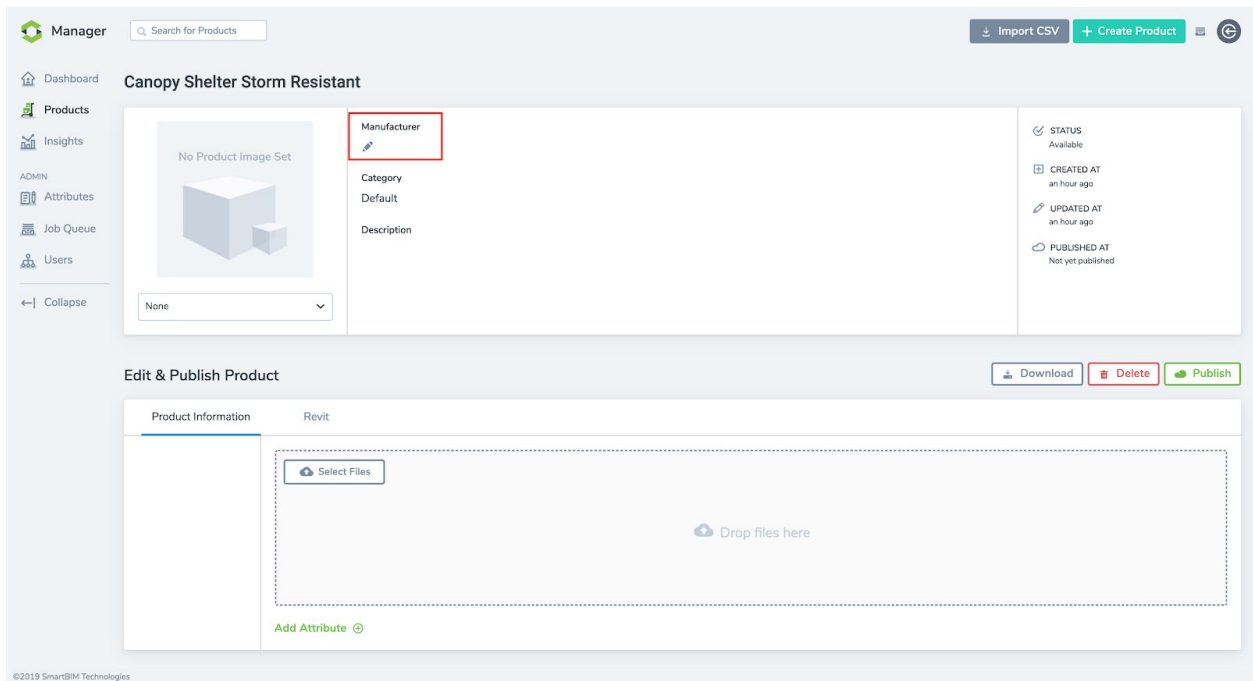


- Doing so will allow you to see the name of the product in a text box. You can change the name of a product here.
- To confirm your name change, click the checkbox next to the product name. To cancel your name change, click the X button next to the product name. Your update/edit will not take place unless you click the “Check” button. You can update this data at any time by clicking the pencil icon in the product name section.



II. Add Manufacturer name

- To change your manufacturer name, hover your mouse under the Manufacturer header and you will see the familiar pencil icon. Click the pencil icon to enable editing of the manufacturer name.



- Like the Product name, click the “Check” button to confirm your update, click the “X” button to redact it. Your update/edit will not take place unless you click the “Check” button. You can update this data at any time by clicking the pencil icon in the manufacturing section.

The screenshot shows the 'Manager' interface for editing a product named 'Canopy Shelter Storm Resistant'. The left sidebar contains navigation links: Dashboard, Products, Insights, ADMIN, Attributes, Job Queue, and Users. The main content area is divided into sections. The 'Manufacturer' field is highlighted with a red box and contains the text 'Iohanna Manufacturing'. Below it, the 'Category' field is set to 'Default' and the 'Description' field is empty. To the right, a 'STATUS' section shows 'Available', 'CREATED AT 11 hours ago', 'UPDATED AT 11 hours ago', and 'PUBLISHED AT Not yet published'. At the bottom, the 'Edit & Publish Product' section is visible, with tabs for 'Product Information' and 'Revit'. The 'Product Information' tab is active, showing a 'Select Files' button and a 'Drop files here' area. An 'Add Attribute' button is also present.

III. Add Category Name

- You can name the category of your product by hovering the mouse over the category section to enable the pencil icon. Click on the pencil icon to enable editing of the product's category.

The screenshot displays the 'Manager' application interface for editing a product. The main heading is 'Canopy Shelter Storm Resistant'. The form is divided into several sections:

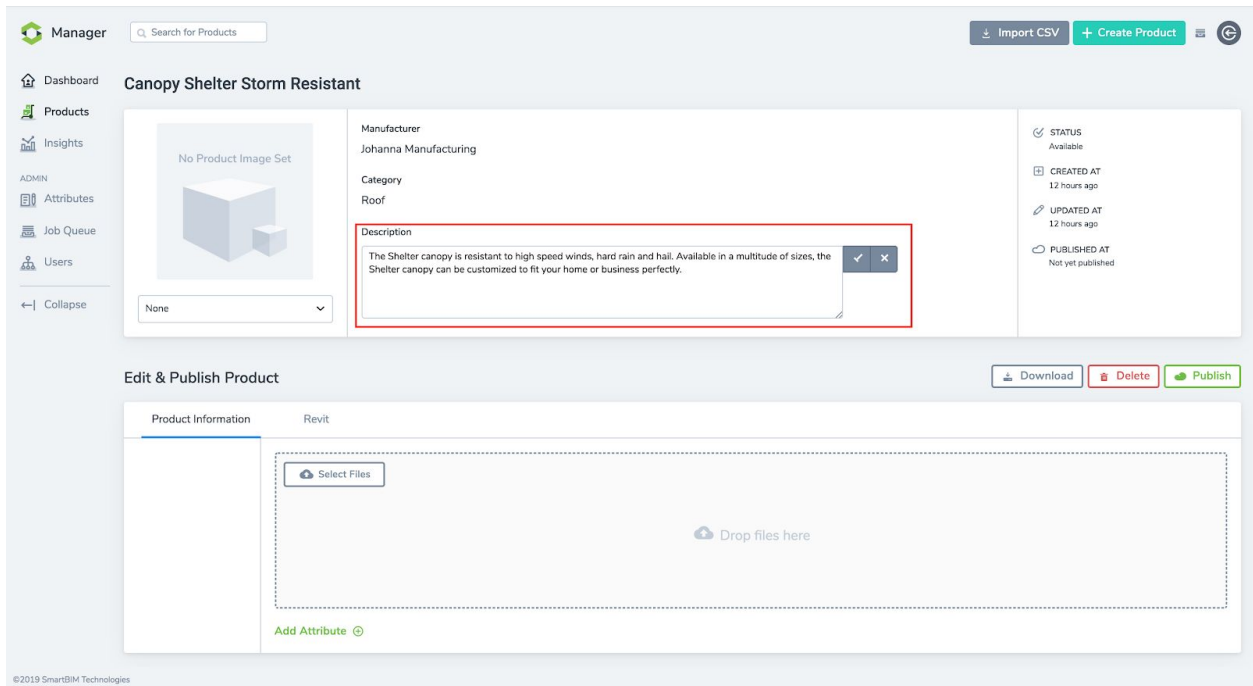
- Manufacturer:** Johanna Manufacturing
- Category:** Roof (highlighted with a red box, with check and X buttons)
- Description:** (Empty text area)
- Image Set:** No Product Image Set (with a 'None' dropdown)
- Status:** Available
- CREATED AT:** 11 hours ago
- UPDATED AT:** 11 hours ago
- PUBLISHED AT:** Not yet published

Below the form is the 'Edit & Publish Product' section, which includes a 'Download' button, a 'Delete' button, and a 'Publish' button. The 'Product Information' tab is active, showing a 'Select Files' button and a 'Drop files here' area. There is also an 'Add Attribute' button with a plus icon.

- Like the Product name and Manufacturer name, click the “Check” button to confirm your update, click the “X” button to redact it. Your update/edit will not take place unless you click the “Check” button. You can update this data at any time by clicking the pencil icon in the category section.

IV. Add Description

- You can add a description for your product by hovering the mouse over the description section to enable the pencil icon. Click on the pencil icon to enable editing of the product’s description.



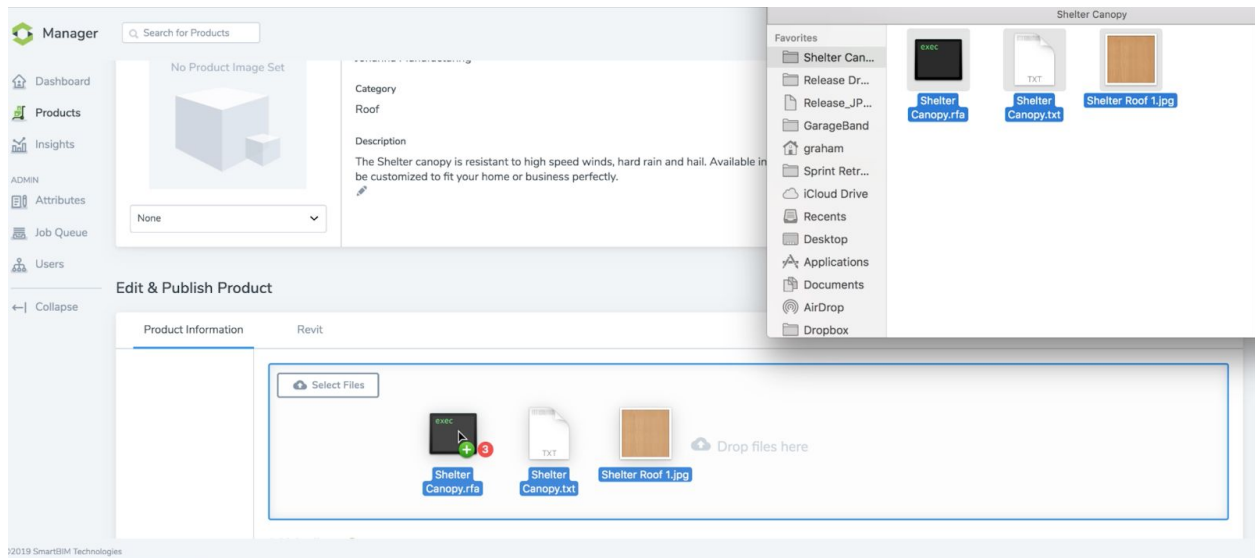
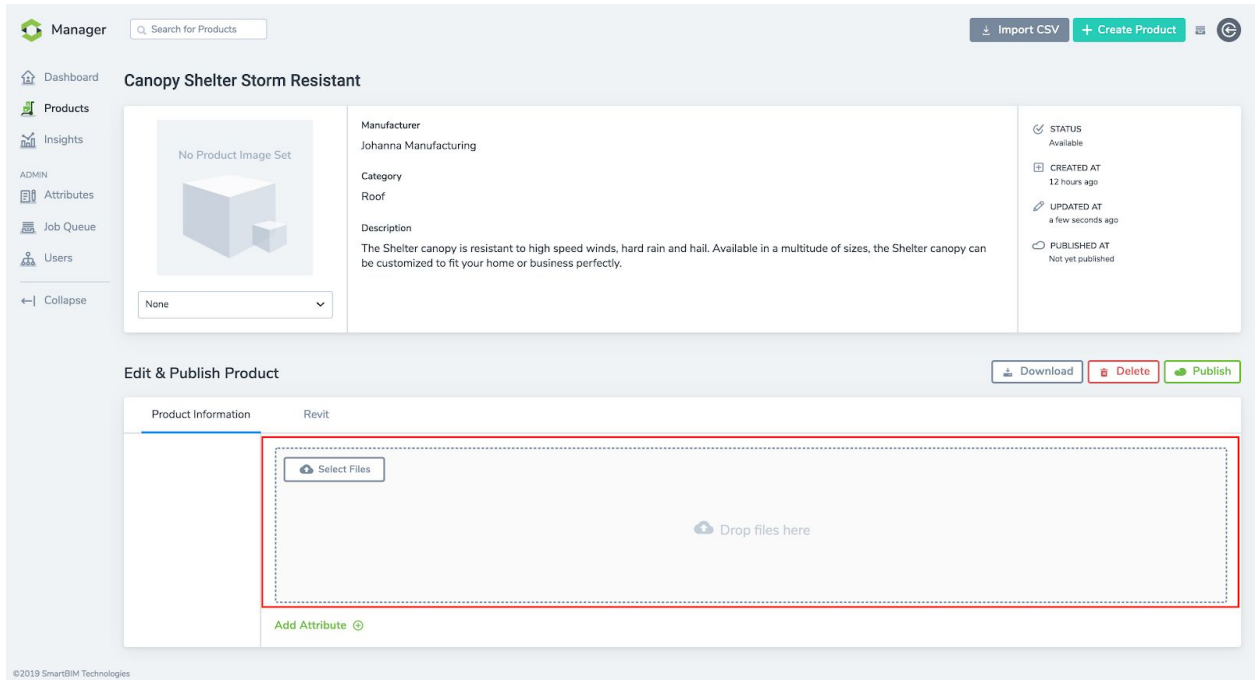
- Like the Product name, manufacturer and category sections, click the “Check” button to confirm your update, click the “X” button to redact it. Your update/edit will not take place unless you click the “Check” button. You can update this data at any time by clicking the pencil icon in the description section.
- The description section does not currently support markdown formatting.

File Attachment Management

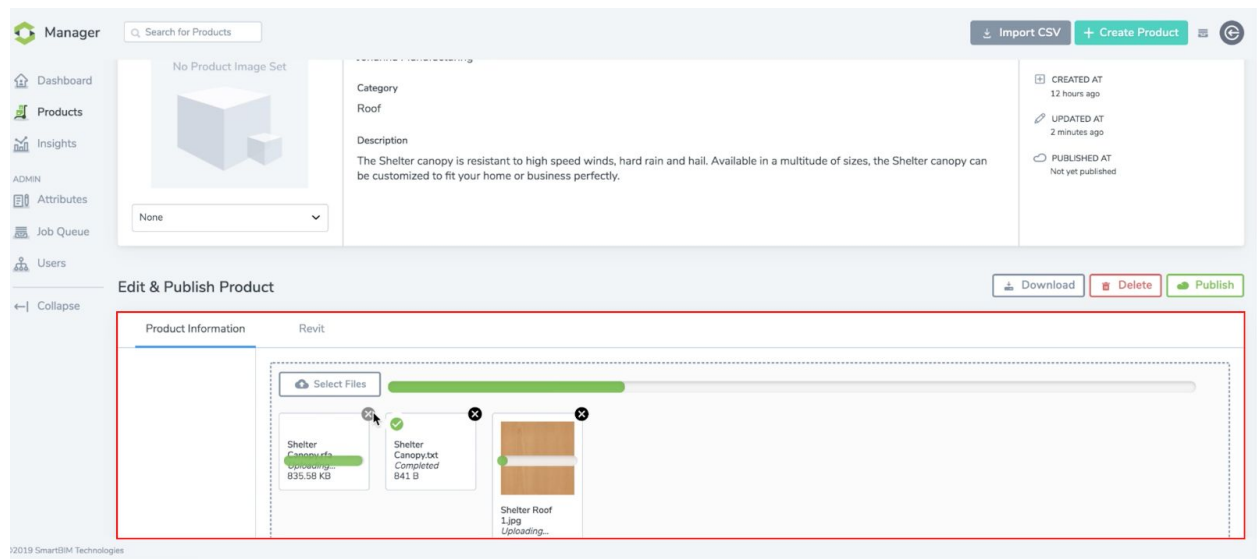
- There are two ways to upload file attachments to the Manager. The most commonly used method is by dragging and dropping files from your local hard drive into the dropzone.
- The other method is by clicking the “Select Files” button which will allow you to upload the files directly from your hard drive to the dropzone.
- Upload any and all relevant files you feel are relevant to the product here.

I. Drag and Drop Upload of File Attachments

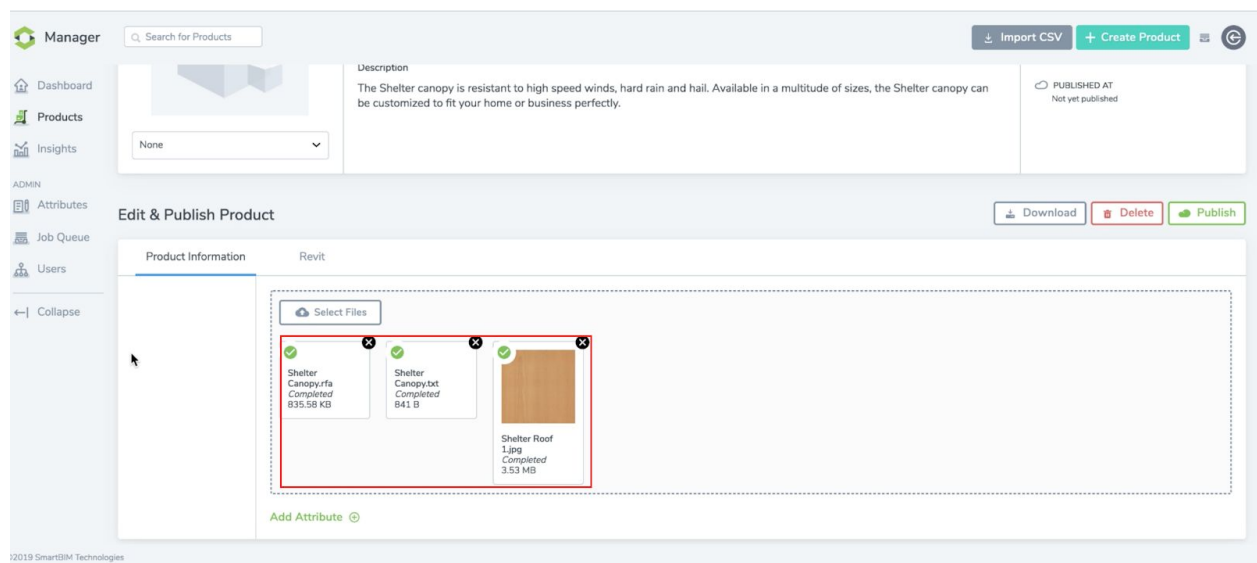
- To drag and drop files, search through your hard drive for the files you wish to attach to the product. Select your files from your hard drive and drag them to the rectangular “Dropzone” which is directly below the description and is in the “Product Information” section.



- During the upload, the progress of your file attachments can be seen on the files themselves and in an overall progress bar at the top of the dropzone.

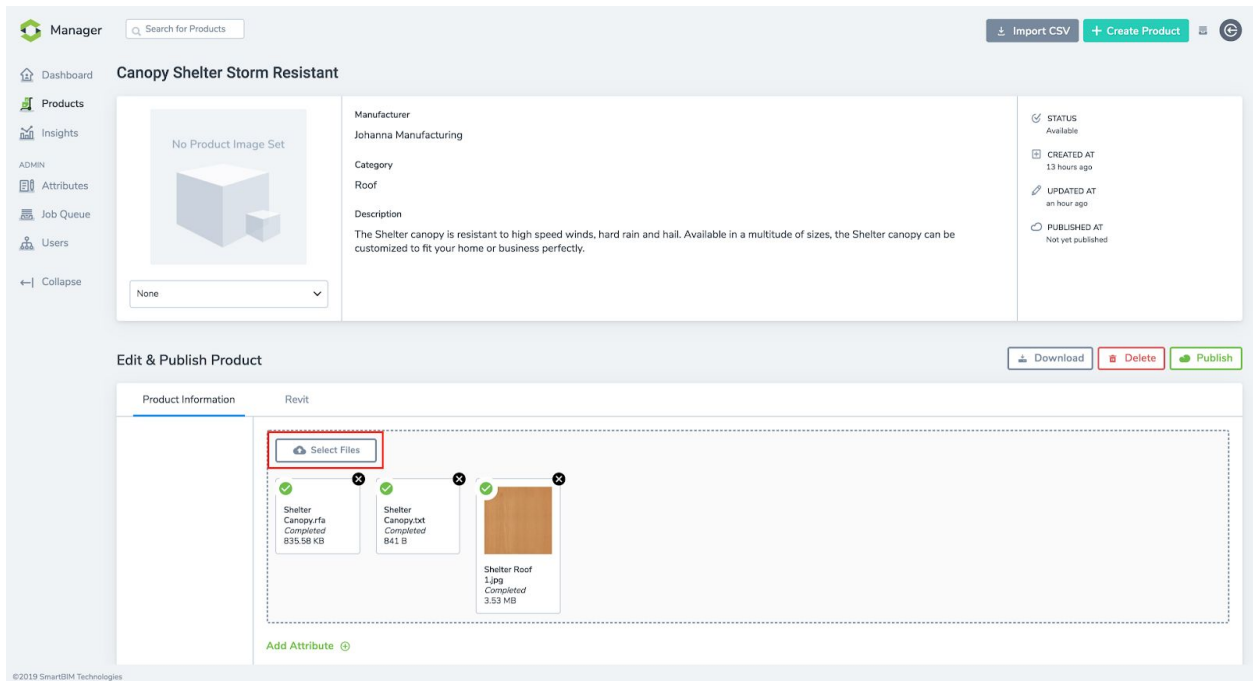


- When the process is complete, the green progress bar will disappear and you will see a green checkbox next to your file attachments indicating that your files are indeed attached to the product.



II. Select Files Button Upload of File Attachments

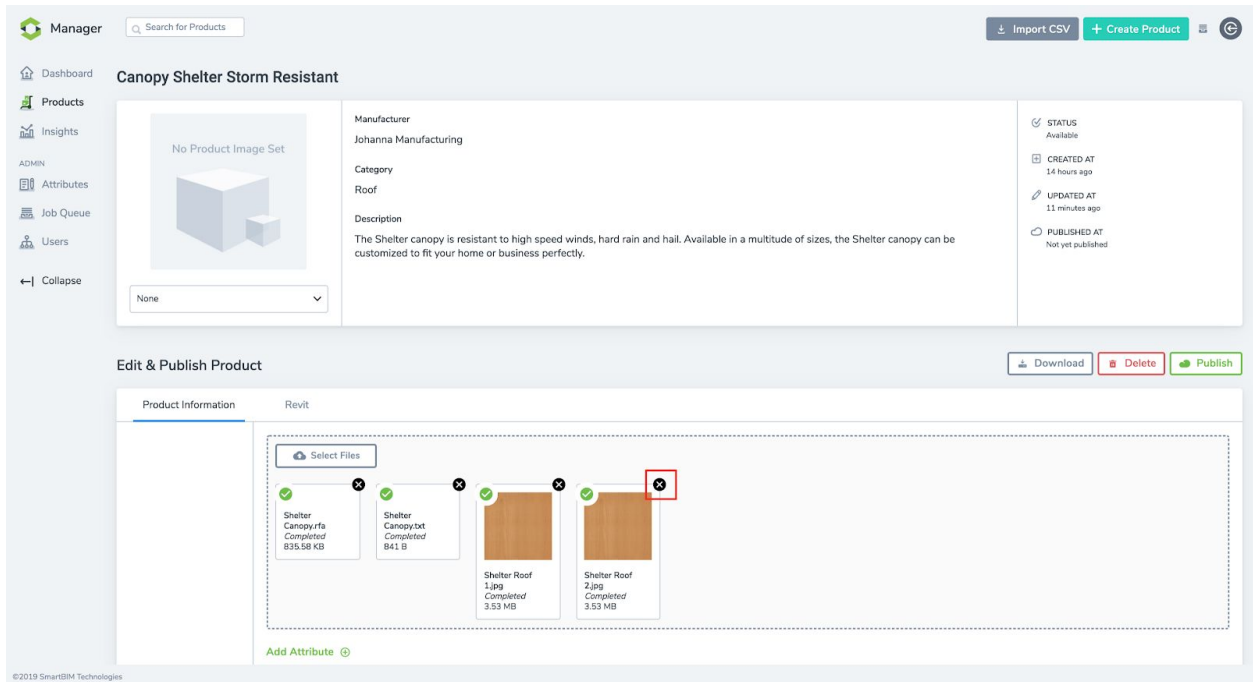
To upload your attachments without drag and drop (or if your browser doesn't support drag and drop) click the select files button.



- This will bring up files from your local hard drive. Select the files you wish to upload and click the open button. The files you selected will now be uploaded to the Manager.

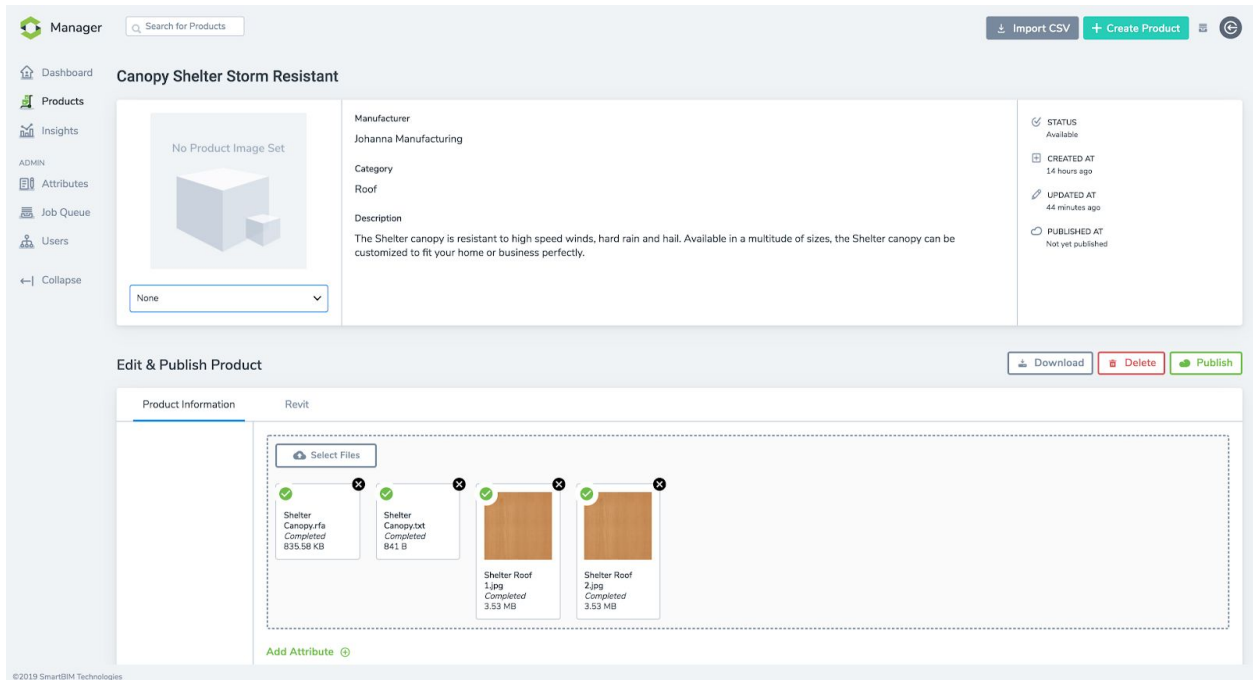
III. Removing File Attachments

- To remove a file attachment, click on the “X” on the file attachment you wish to remove. Doing so will immediately remove the file attachment.

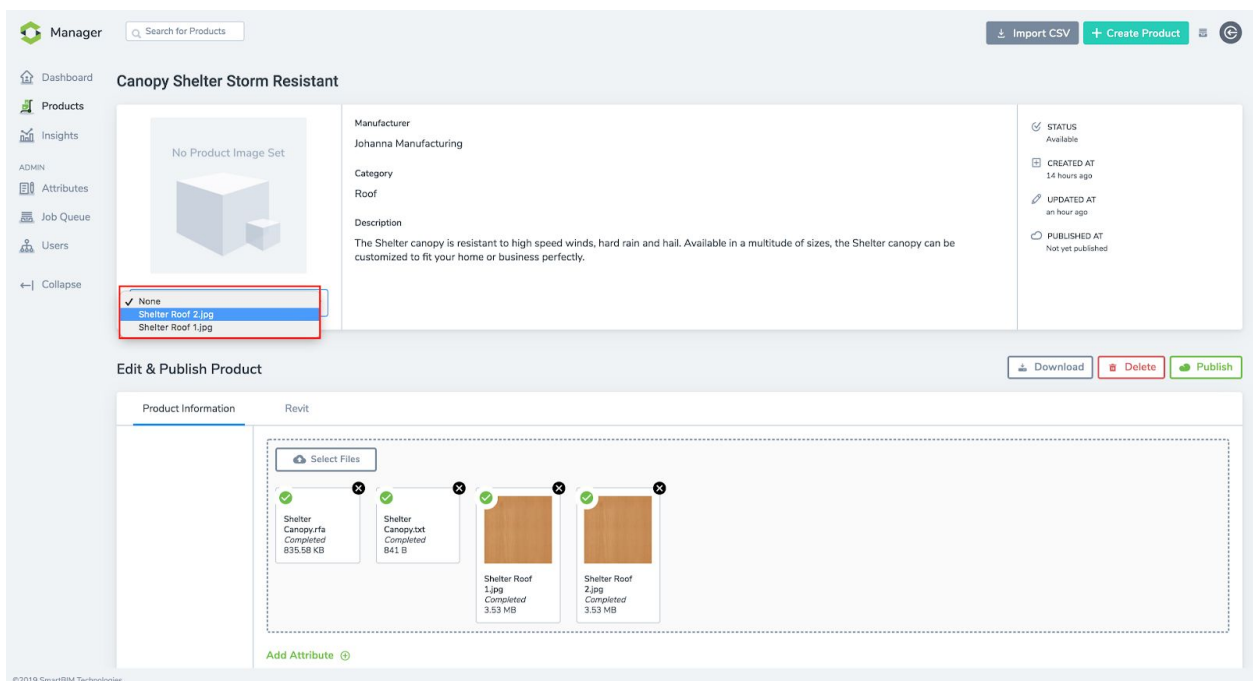


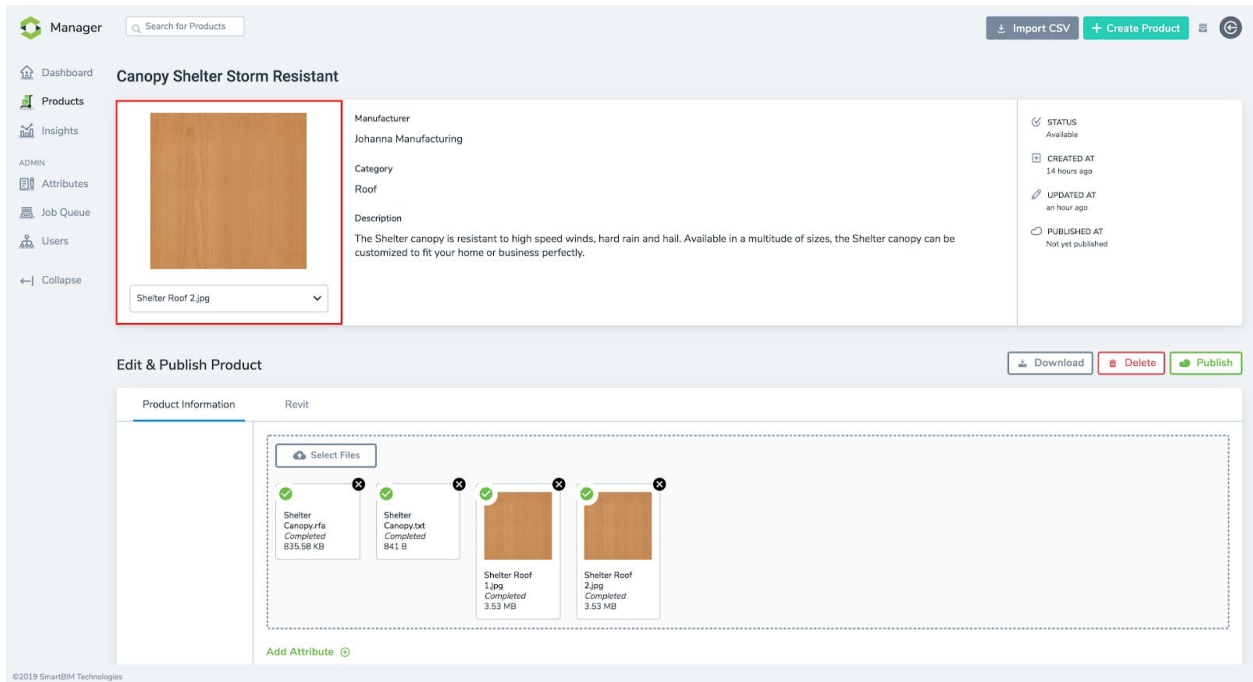
Selecting A Key Image

- A key image is important to the branding of your product for the AEC community. The key image is set in the top left hand corner and is the image that AEC users will see when viewing your product on the Design Studio. This does not mean that only one image can be attached to products, just that only one image will be displayed on the Design Studio.
- The first step is ensuring that you have uploaded an image to dropzone. Instructions on uploading any file attachment is covered in the “File Attachment Management” section on page (insert page number here).
- The key image on the product details page can be set from the key image section with a drop-down menu that contains all image files attached to the product.



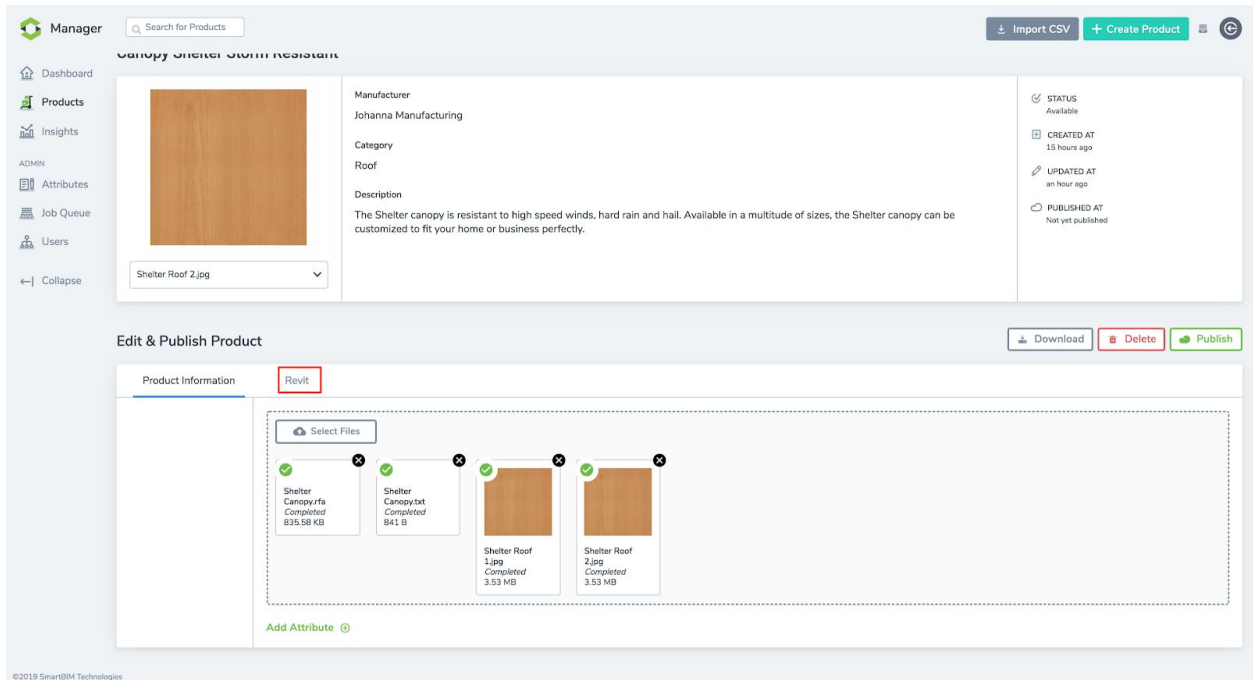
- Click the drop-down section in the key image area. Your list of images will appear. Select the image you want to display and the image will change automatically to what you selected. The image that is selected will be the one that will appear in this section when the product is published to the Design Studio.



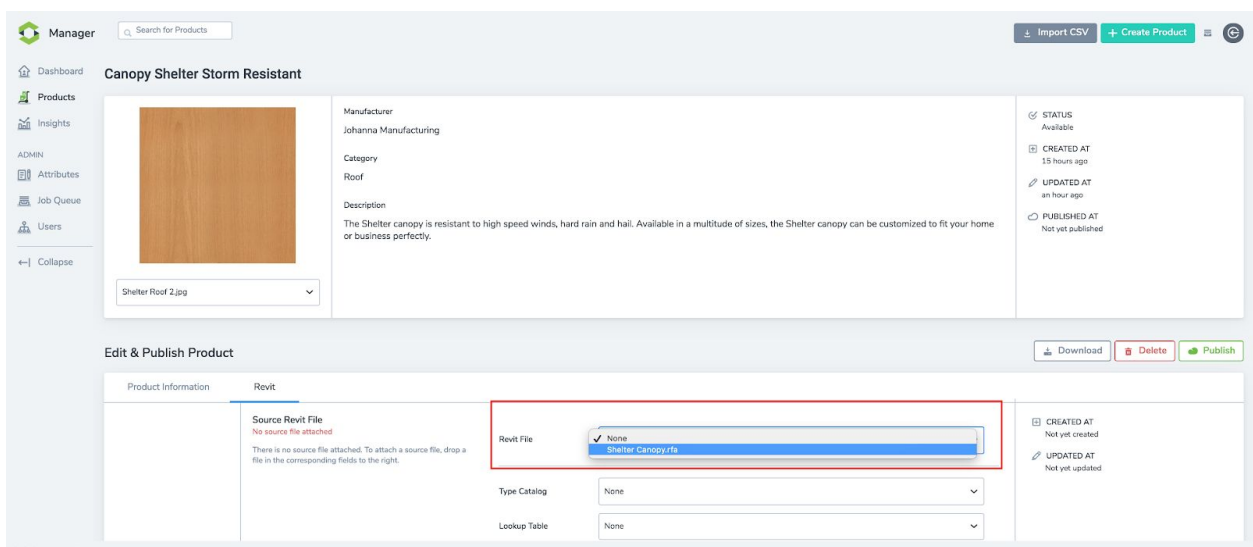


Importing Revit Data

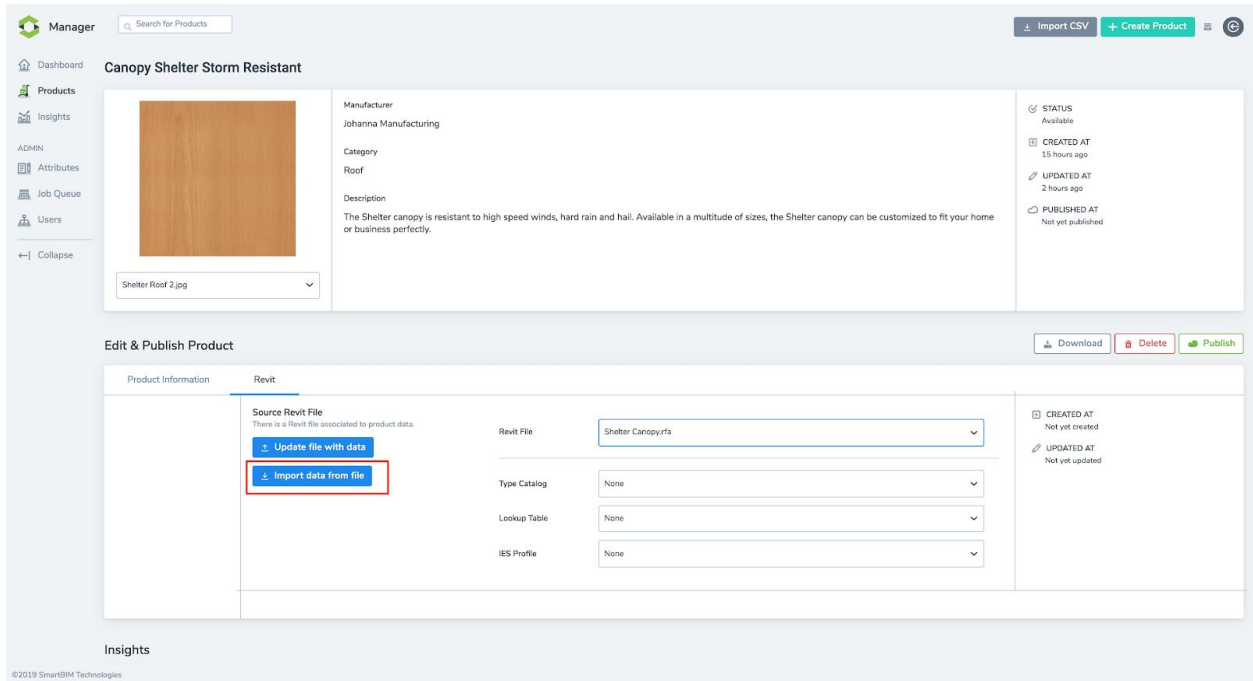
- If you have uploaded a RVT/RFA file into the dropzone, now it's time to import that data. Please double check that you have imported an RFA/RVT file to the dropzone, as you will not be able to import revit data on an existing product without first uploading the attachment to the dropzone.
- Once you've confirmed that you have an RFA/RVT file uploaded to the dropzone, please click the "Revit" section on the product details page.



- You will now be taken to the Revit section. You will see sections for Revit, Type Catalog, Lookup table, and IES Profile. We will cover the latter three sections later, for now, let's just focus on the Revit section.
- Go to the Revit dropdown menu, click it, and you should see your RFA/RVT file(s) that have been uploaded to the product. Select the file whose data you wish to import.



- Once you do this, two buttons will appear in the left hand corner of the screen, “Update file with data” and “Import data from file”. In order to pull the data from the Revit file, click the “Import Data from file” button.
- We will cover the Update file with data functionality later in the guide.




- Clicking the Import data from file button will allow the SmartBIM Design Manager to extract the Revit Data from the Revit file and have the data appear on the SmartBIM Design Manager.
- This process is not instantaneous, however, and could take anywhere between 30 seconds-3 minutes depending on the amount of families that are in the revit file or the size of the file itself.
- You will receive a message stating that the product is locked for editing. During this time, the Revit data section of the product cannot be interacted with.

Manager Search for Products

Dashboard Products Insights ADMIN Attributes Job Queue Users Collapse

Canopy Shelter Storm Resistant



Shelter Roof 2.jpg

Manufacturer: Johanna Manufacturing

Category: Roof

Description: The Shelter canopy is resistant to high speed winds, hard rain and hail. Available in a multitude of sizes, the Shelter canopy can be customized to fit your home or business perfectly.

STATUS: Processing

CREATED AT: 15 hours ago

UPDATED AT: a few seconds ago

PUBLISHED AT: Not yet published

Product is Being Updated...
This product is currently updating and is locked for editing or publishing. Please check back later.

Cancel update

Edit & Publish Product

Download Delete Publish

Product Information Revit

Source Revit File
There is a Revit file associated to product data.

Update file with data Import data from file

Revit File: Shelter Canopy.rvt

Type Catalog: None

Lookup Table: None

CREATED AT: Not yet created

UPDATED AT: Not yet updated

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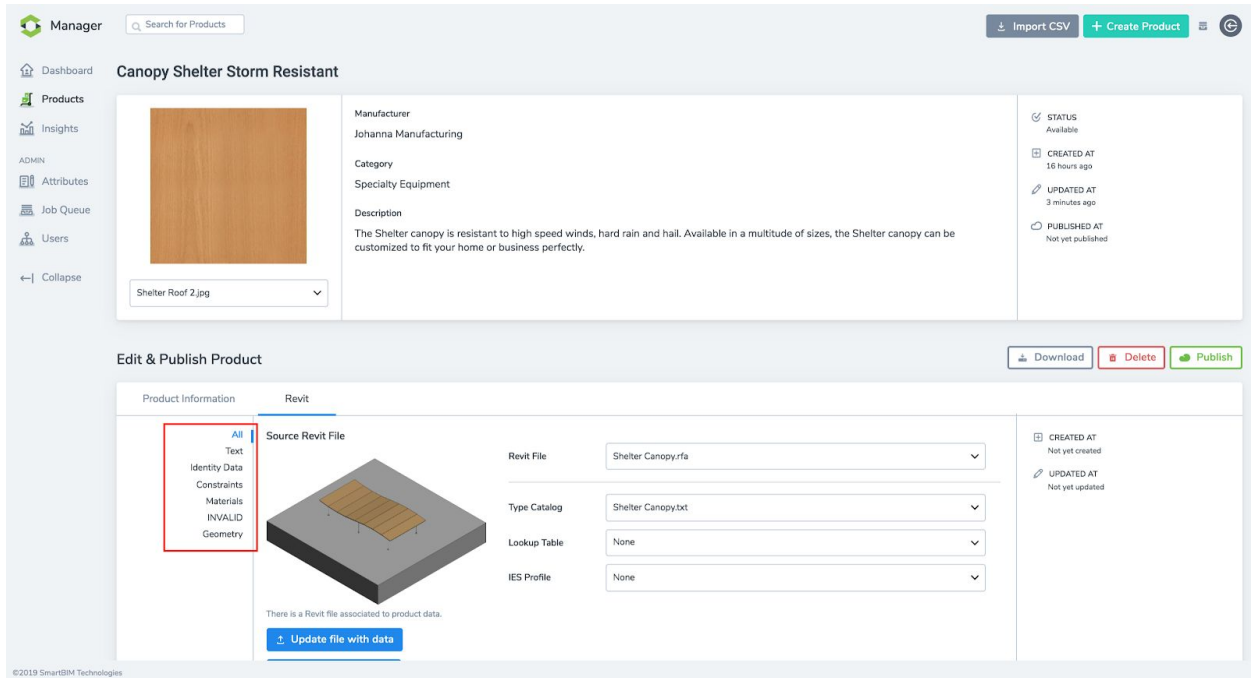
- Once the processing of your Revit file is complete, the data from the Revit file will now appear on the Design Manager below where you selected your Revit file for data import.

Add Attribute

Assembly Code	C3030200	
Cable Length Actual	= if(Cable Length Desired < 1", 1", if(Cable Length Desired > 120", 120", Cable Length Desired))	
Cable Length Desired	12	in
Cost		
Default Elevation	0	in
Description	= Johanna Manufacturing Tall Canopies	
Finish	Johanna Manufacturing	
Fire Rating		
Installation Guide		
Keynote		
Length	= 96	
Manufacturer	= Johanna Manufacturing	
Material		
Model	-	

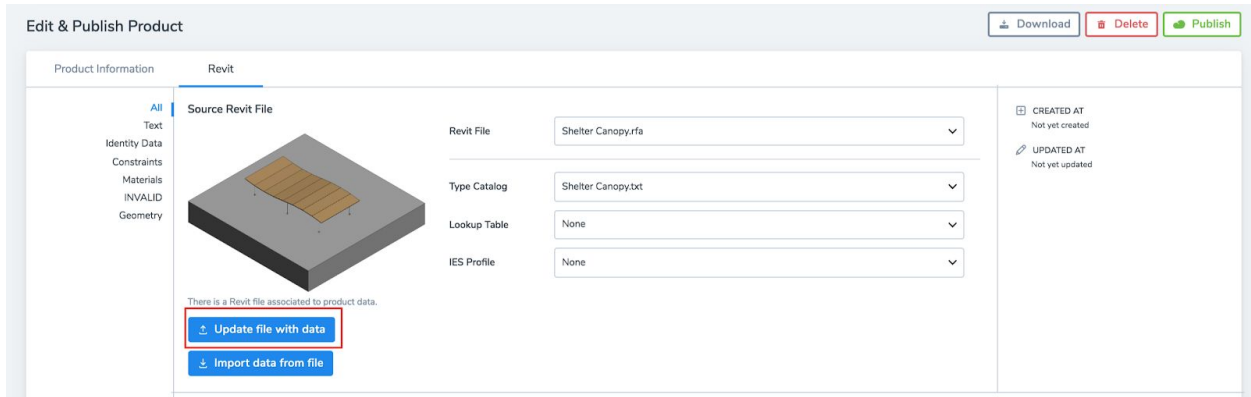
- You will also different subsections of data on the left side of the screen that filters out data by type.

- By default, you will see all the data attributed to a Revit file, but if you just want to view a subsection of data, simply click on the options pictured here.



Data Editing

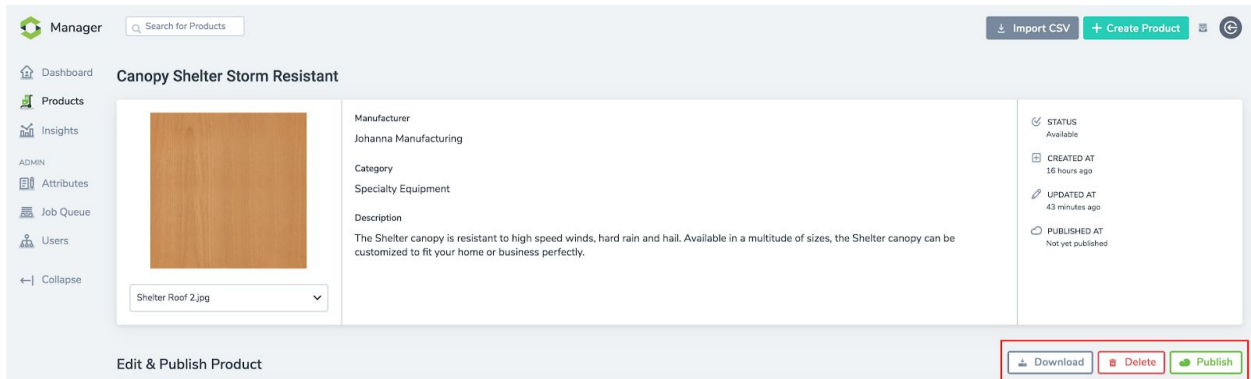
- To edit data within your product, click within any of the textboxes that contain Revit data and enter the adjustments you want to make. To save your changes to the Design Manager, click outside of the text box and your changes will automatically be saved to Manager, but not to the Revit file.
- We recommend changing text based items (pieces like URL's or descriptions for example) in the Manager and to make adjustments based on geometry in Revit itself as the Manager cannot change the physical geometry of a revit file.
- When making changes within the textboxes of the Revit data, your data does not automatically update to your Revit file. The only way to ensure that happens is to click the "Update file with data" button.
- When you're ready to write the changes you made in the Design Manager to the Revit file, click this button.



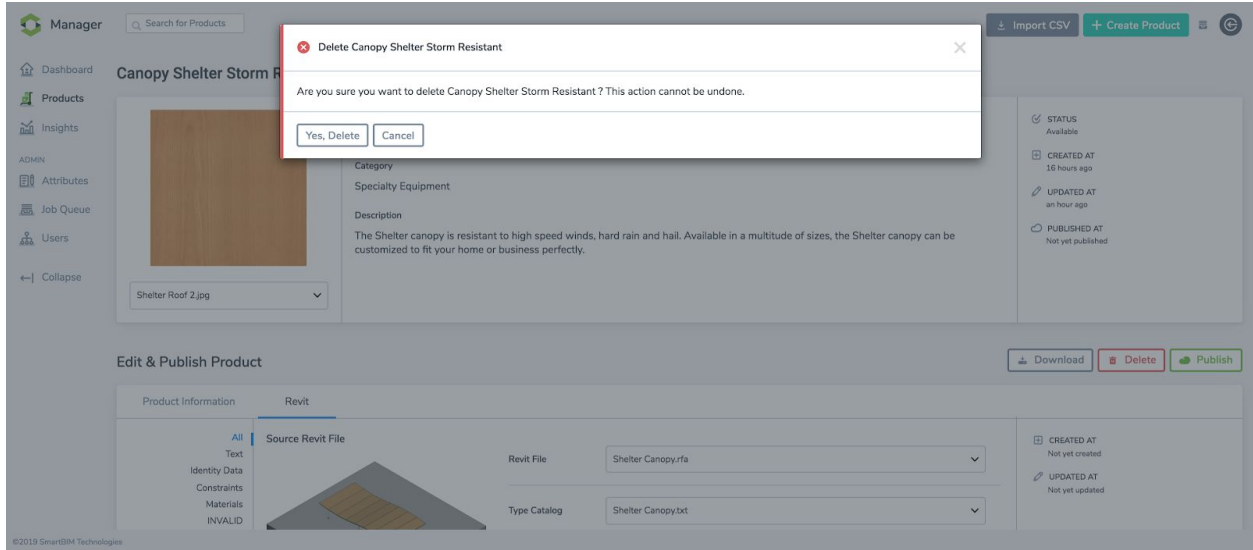
- The Design Manager will once again lock the Revit portion of the product down while the system writes your changes back to your Revit file.
- After the Design Manager has written the data successfully back to your Revit file, the product will unlock and you can once again interact with the Revit portion of your product.

Product Actions Section

- The Product Actions section contains three buttons, “Download”, “Delete”, and “Publish”.



- Clicking the download button will download all product attachments, a CSV of product data, and a CSV of Revit data into a zip folder that will download to your local hard drive.
- Clicking the “Delete” Button will delete the product from the Design Manager. A modal will appear when you click this button asking you to confirm whether or not you wish to delete this product.



- **This is only recommended if you are planning on never working with the product in question again.**
- If you or your team makes an update to the Revit file you're currently using, instead of creating a new product, you should simply replace the old Revit file with the new one by deleting the old Revit file from the dropzone, and uploading and importing the new Revit file's data to your already existing product.
- Clicking the "Publish" button will publish the product to your Design Studio with all the file attachments you have uploaded, and data you have imported. This process takes anywhere between 30 seconds-2 minutes if you are only publishing one product.

Additional Functionality and General Notes

- There is a number of different functionality and callouts that are available to you that we will be covering later in the user guide.
- The goal of this piece was to take you step by step in the creation of a singular product from beginning to end.
- The SmartBIM Design Manager only has the intelligence to extract data from RFA, RTE, RVT, TXT (Revit type catalog), IES, and Lookup Table files. While you can upload SKP (Sketchup), CAD, AUTOCAD files to the Dropzone and they will be attached to your product, there is currently no way for us to extract data from those file types and populate them on the Design Manager.

Creating A Product From A Revit File

I. Overview

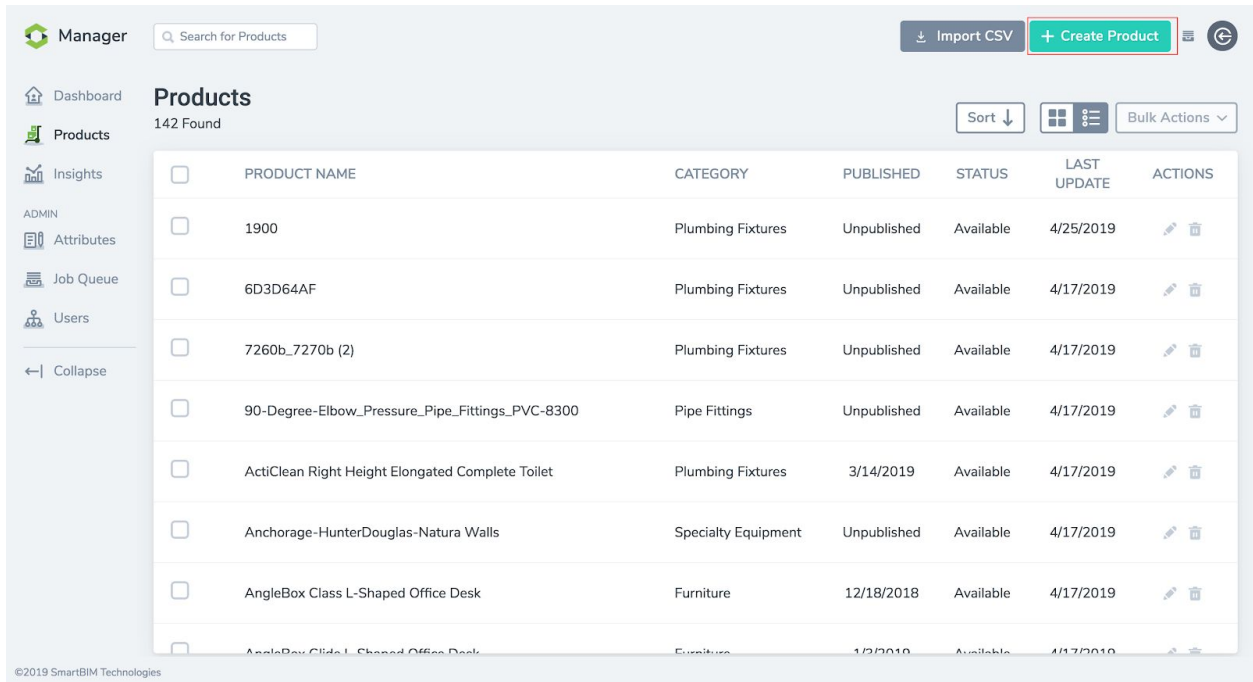
- The majority of the time, if you are working with Revit products, you will be creating products by uploading Revit files which brings us back to the second way to create products by doing just that.
- During this process, the only acceptable file types to create a product are RFA, RTE, RVT files. If you try to upload any other file type on its own (even a supporting file like a type catalog, IES profile or Lookup Table) you will be unable to create a product this way.

II. Supporting Files

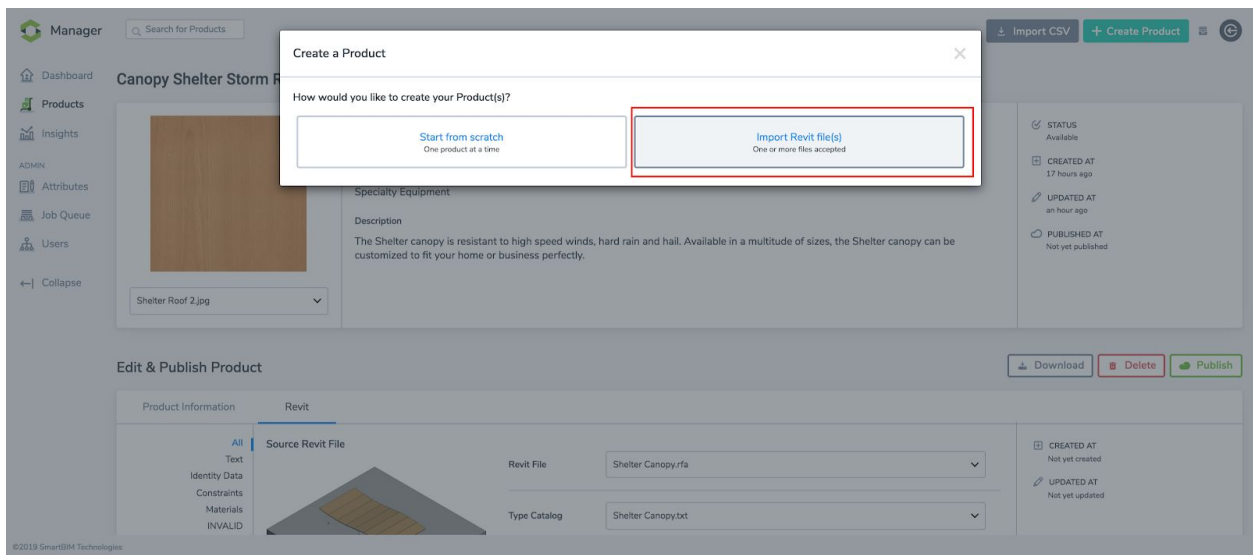
- Supporting files, however, can be uploaded in conjunction with RFA, RTE, and RVT files to create a single product.
- Images, Type Catalogs, IES Profiles, and Lookup Tables can be uploaded with a corresponding Revit file to create a product, but it must share the same name as the Revit file (e.g. if the Revit file is named Armless_Chair_01.RFA, then an image that you wanted to attach to a product must be named Armless_Chair_01.JPG).
- If your supporting file and Revit file do not share identical names (minus the file extensions), then your supporting files will not properly attach to your product.

III. Selecting Creation Via Import Revit

- Start by clicking the green Create A Product button from any page on the Design Manager.



- Next, select the Import Revit files button.

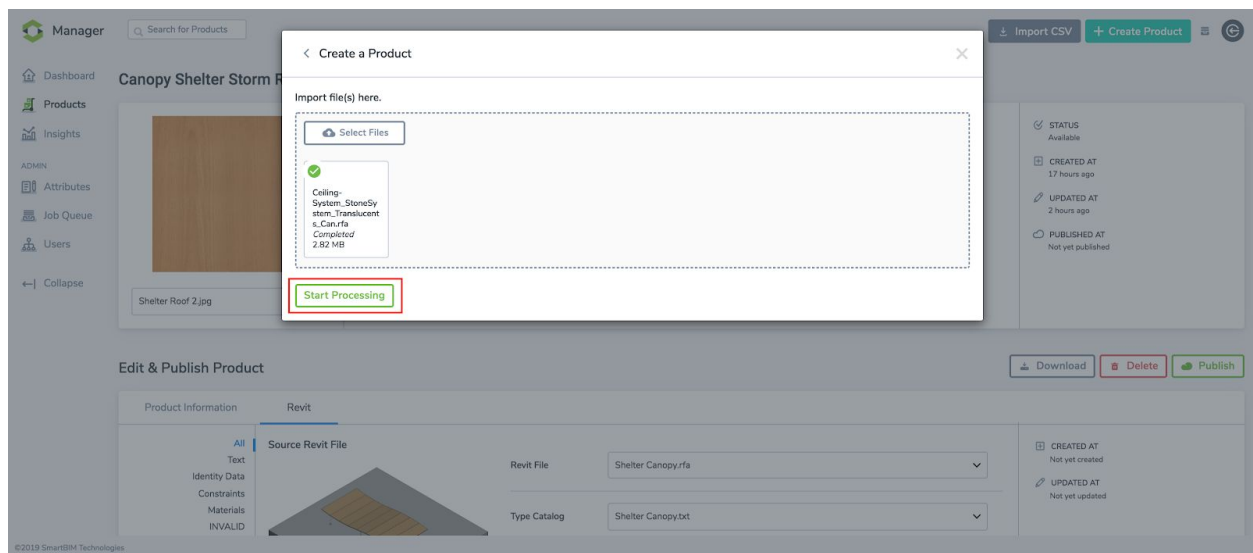


- You will now see a Dropzone with the option to upload files via dragging and dropping files from your hard drive into the dropzone, or by finding your local files by clicking the select files button.
- You may select as many Revit files as you'd like to create new products.

- If you are uploading multiple RFA/RVT files at once, but you only want them to create one product, then you need to only import one Revit file first in this step and then once the product is created, upload the remaining RFA or RVT files via the Dropzone on the product details page.
- Every RFA/RVT/RTE file you upload here will create a new product.
- For clarity, we will start with uploading only one Revit file and creating one product.

IV. Creating One Product via Revit file Import

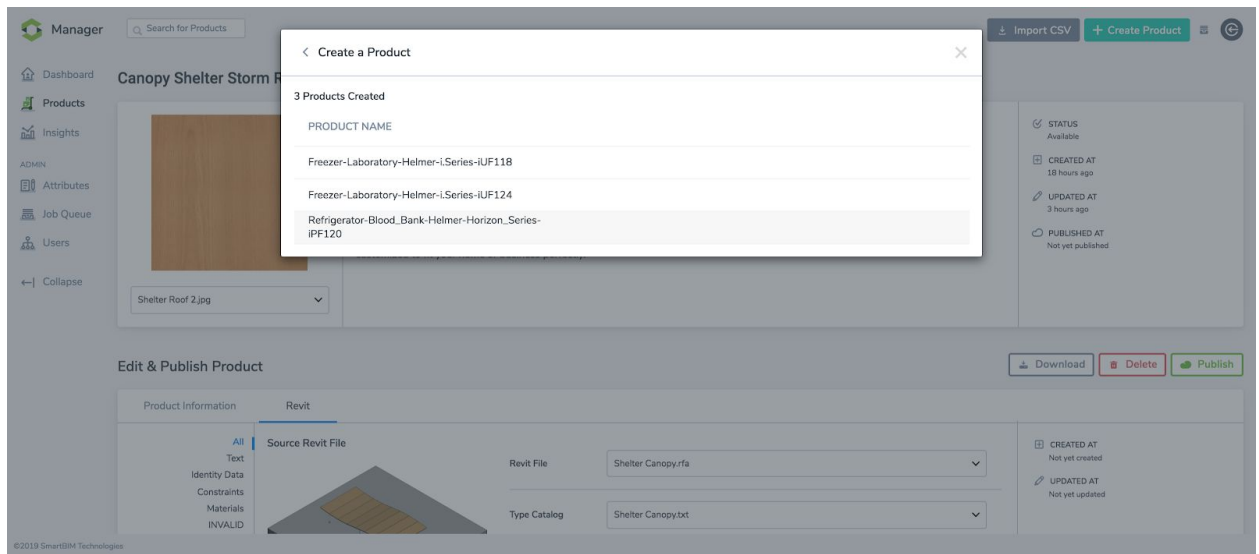
- Once you have selected your product and uploaded it either via drag and drop or by clicking the select files button, click the “Start Processing” button.



- Once you click start processing, you will be taken to this product's product details page and your product will be stored in the Design Manager.
- You will need to wait a moment as your product's Revit section will be locked as the data is extracted from your Revit file.
- Once your file has finished its data extraction, you will be able to interact with the revit data section again.

V. Creating Multiple Products Via Revit Import

- Once you have selected your products and your corresponding support files and uploaded them either via drag and drop or by clicking the select files button, click the “Start Processing” button.
- A list will appear of the products you have just created and the total amount you have created.



- Click on one of the products to be taken immediately to the product you selected.

Product Details Page- Additional Revit Data Information

- In the Revit section (accessed by clicking the Revit tab), as we mentioned before, products with imported data will display Revit data. In this section, we will go over features that were not previously covered in our last tutorial.

I. Viewing Additional Revit Families

If your product has more than one Revit family, you can view them by clicking this dropdown menu.

Manager

Search for Products

Import CSV Create Product

Identity Data

Text

Construction

General

Materials

Green Building

Geometry

Energy Analysis

There is a Revit file associated to product data.

Revit File Materials-USG-Halcyn.rvt

Update file with data

Import data from file

Type Catalog None

Lookup Table None

IES Profile None

Not yet created

UPDATED AT

Not yet updated

Type

Family: Acoustic Ceiling Tile - USG - Halcyn

Add Attribute

ASTM E1264 Classification Type XII, Form 2, Pattern E & G

CAC 25

Class 0

Color 10330015

Comments

Cost 0

Description 2' x 2' x 1 1/2" Acoustic Ceiling Tile

Edge Profile SQ, SL, FL

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- If you pick another family type, you will see data that corresponds to the family type that has been selected.

II. Family removal

- Sometimes, our system will identify families or materials in your Revit file that you may not want displayed on the Manager of the Design Studio. In the Revit section, click on the family/material dropdown list and select the family you want to remove.

Insights

Snapshot Growth Lead

Views

ALL VIEWS

Views Downloads 03/01/2018 TO 03/30/2018

Type

Add Attribute

Base

Family: Basic Wall

Family: Foam Tile Backerboard - USG - UltraLight - 1 1/2" x 25" x 8"

Family: Foam Tile Backerboard - USG - UltraLight - 1" x 25" x 8"

Family: Foam Tile Backerboard - USG - UltraLight - 1/2" x 3' x 5'

Family: Foam Tile Backerboard - USG - UltraLight - 1/2" x 4' x 8'

Family: Foam Tile Backerboard - USG - UltraLight - 1/4" x 3' x 5'

Family: Foam Tile Backerboard - USG - UltraLight - 2" x 25" x 8"

Family: Foam Tile Backerboard - USG - UltraLight - 5/8" x 3' x 5'

Family: Gypsum Board - Generic - Regular - 1/2"

Family: Iron, Ductile - 22

Family: Iron, Ductile - 30

Family: Material Tag

Family: Mortar - Tile - Generic - Thinset Mortar - 3/32"

Family: Paint - Generic - Interior Latex - Eggshell - Light Beige

Family: Paint - Generic - Primer - Acrylic Latex

Family: Polyvinyl Chloride, Rigid - Schedule 40

Family: Polyvinyl Chloride, Rigid - Schedule 80

Family: Steel, Carbon - Schedule 40

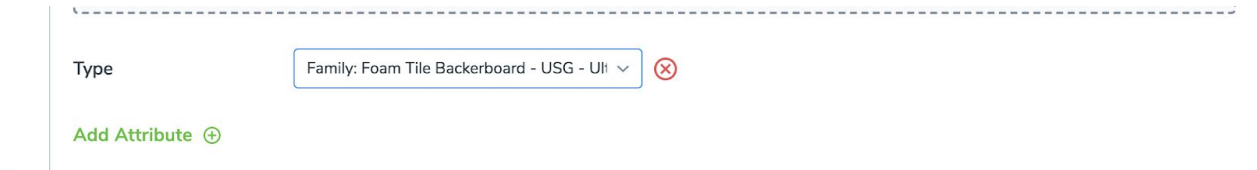
Family: Steel, Carbon - Schedule 80

Family: Tile - Generic - Ceramic - 3x3 Blue - 3/8"

Family: Wood Studs - Generic - 2x4

Material: Basic Wall

Material: Foam Tile Backerboard - USG - UltraLight - 1 1/2" x 25" x 8"



Type

Family: Foam Tile Backerboard - USG - UltraLight

Add Attribute

- After selecting the family you want to remove, clicking the red x button next to the family will initiate a confirmation modal.



Remove Family: Foam Tile Backerboard - USG - UltraLight - 1 1/2" x 25" x 8'

Are you sure you want to delete Family: Foam Tile Backerboard - USG - UltraLight - 1 1/2" x 25" x 8'? This action cannot be undone.

Yes, Delete Cancel

- Clicking “Yes, Delete” will reaffirm this action and eliminate the family or material. This does not remove it from the Revit file, it only prevents it from being displayed on the Manager and when the product is published to the Design Studio.

III. Units of Measurement

- Dropdowns are next to every attribute containing a unit of measurement. If you need to change a specific attribute’s unit of measurement from inches to meters, you can do so and much more. If you want data to publish values in inches or feet as opposed to using the metric system, you can now do so as well by setting your desired units of measurement in the Design Manager.
- Below are some examples of the units of measurement we support. We support the metric system, and imperial system in length, mass, electric current, and temperature.

Type

Family: Backstop_SMARTBIM

Add Attribute

04 CSI

=

32 31 13.33

fx

95 CSI

=

02821

fx

Assembly Code

G2040

fx

Chain link Fence

CL Fence Fabric

fx

Default Elevation

48

in

fx

Manufacturer

=

SMARTBIM

fx

Pole

Metal

fx

SmartBIM Object Created By

=

SMARTBIM, LLC

fx

SmartBIM Object Version

=

3

fx

Subcategory

=

Playing Fields

fx

Type

Family: Backstop_SMARTBIM

Add Attribute

04 CSI

=

32 31 13.33

fx

95 CSI

=

02821

fx

Assembly Code

G2040

fx

Chain link Fence

CL Fence Fabric

fx

Default Elevation

48

ft

fx

Manufacturer

=

SMARTBIM

fx

Pole

Metal

fx

SmartBIM Object Created By

=

SMARTBIM, LLC

fx

SmartBIM Object Version

=

3

fx

Subcategory

=

Playing Fields

fx

Model Number

=

003628

fx

Mounting

=

Junction box

fx

Operating Temperature

100.00000000000006

K

fx

Operating Temperature Note

32° to 100° F (0° to 38°C)

°C

fx

Output




















20

A

fx

IV. Formulas

- If your revit file has formulas enabled, those formula values will display on the Design Manager upon import. When there is a formula, it is highlighted by the blue formula icon on the right side of the screen. Want to turn the formula off? Just click on the button and the formula is removed.

Type	Family: Backstop_SMARTBIM		ⓧ
Add Attribute ➕			
04 CSI	= 32 31 13.33		
95 CSI	= 02821		
Assembly Code	G2040		
Chain link Fence	CL Fence Fabric		
Default Elevation	48	in	
Manufacturer	= SMARTBIM		
Pole	Metal		
SmartBIM Object Created By	= SMARTBIM, LLC		
SmartBIM Object Version	= 3		
Subcategory	= Playing Fields		

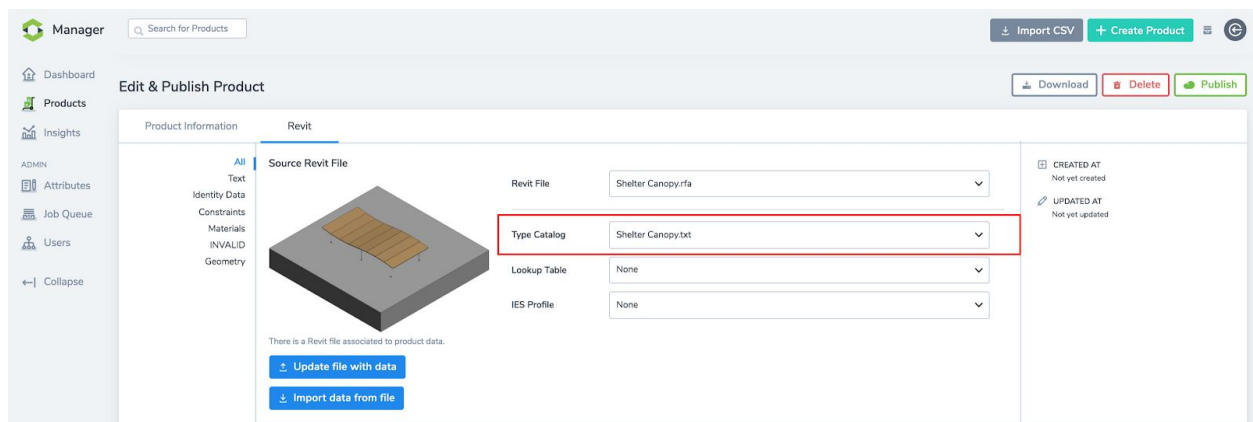
Turn formula off

V. Adding and Removing Attributes

- You may notice the “Add Attribute” button and the trashcan icon (Remove Attribute button) next to each attribute that exists in your product data. We will be covering functionality related to those pieces later in the user guide.
- It’s important to understand where the attributes derive from as that is an entire system in and of itself; which while inextricably linked to your data, is also at first managed in a completely different section of the Design Manager.

VI. Ensuring that Type Catalogs, IES Profiles and Lookup Table Data Is Imported Properly

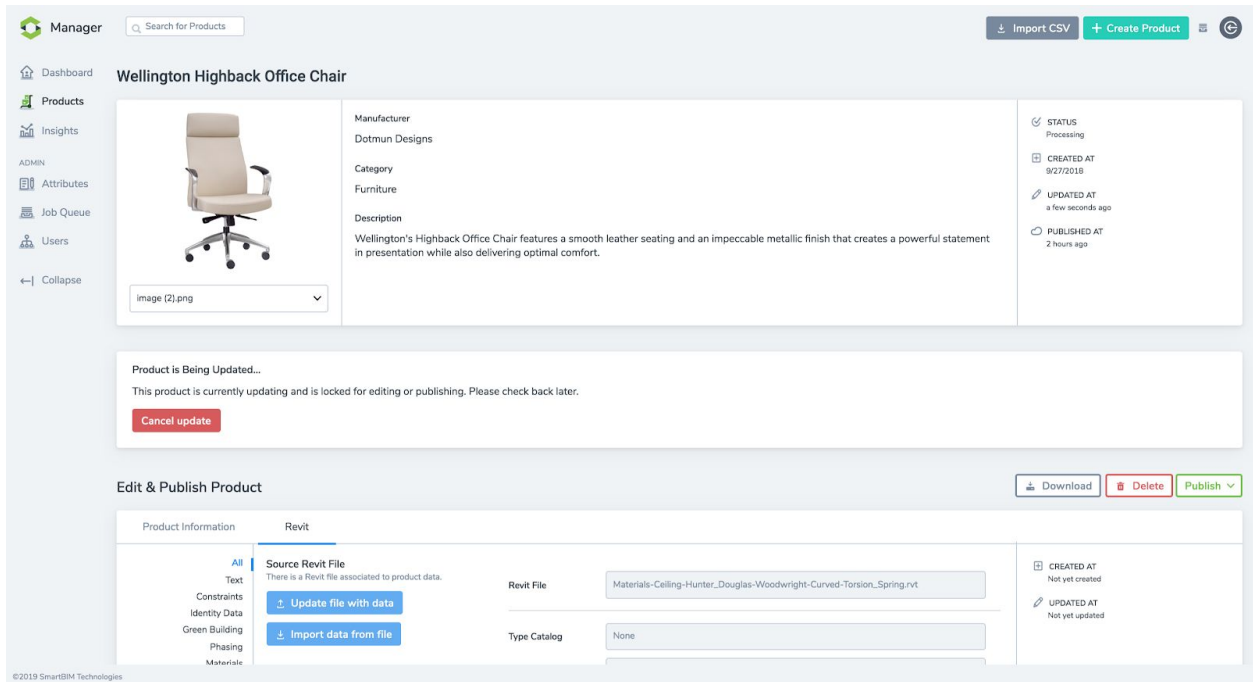
- If you have a Type Catalog, IES Profile or Lookup Table that you have yet to add to your product (if you upload one of these files when you initially create a product via Revit import, then you don't have to worry about this) then it is imperative that you add the files you need to the dropzone of the product in question.
- From there, click the Revit section and make sure your supplemental attachment is selected in the Revit Source File Section.



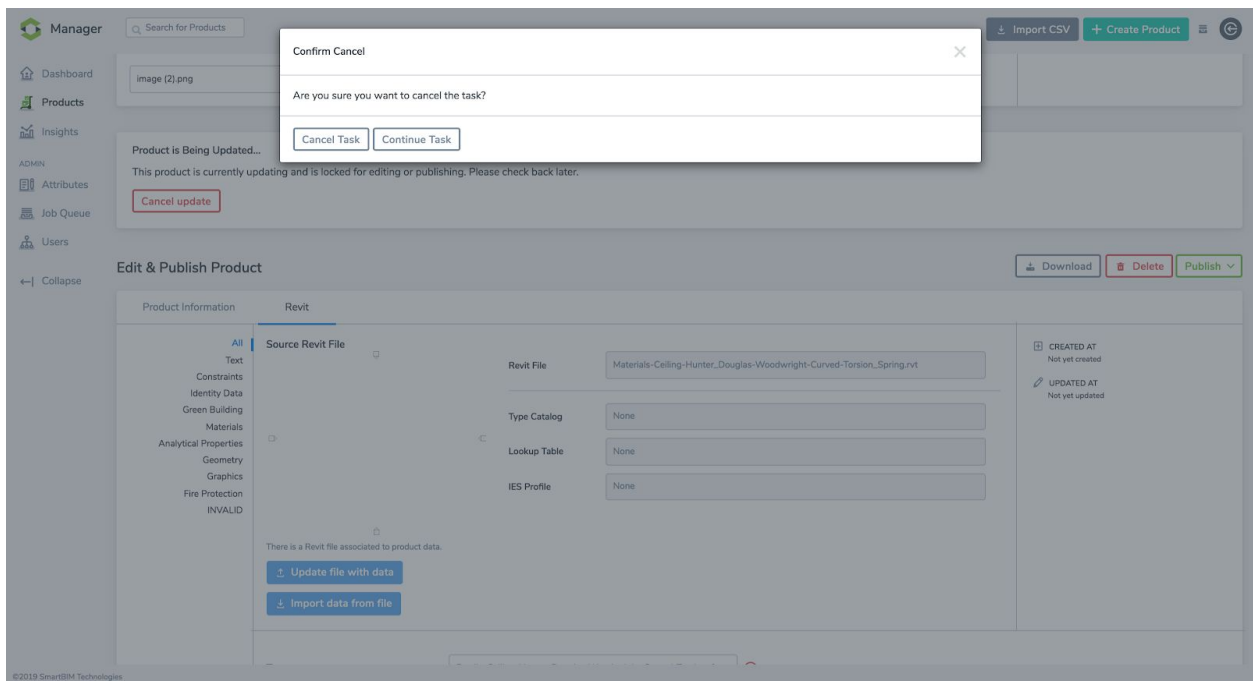
- In this instance, we're using type catalogs as an example.
- Ensure that your support files are attached via the dropzone and that you have selected them in their appropriate Revit dropdown picklist menu, **and then click Import data from file to gather all the data you need to ensure your product's data integrity.**
- As stated, if you added the appropriate support file when creating the product initially via the revit file creation process, you don't have to worry about this. But if you add a support file after the fact, this is an imperative step that should not be skipped.

VII. Canceling A Job

If there is a need to cancel a job that is in progress on the product details page, click the cancel job button which will appear any time a job is in progress.



- Clicking the “Cancel Task” button will cancel the in progress job. Clicking “Continue Task” will allow the job to continue as planned.



- This can be useful if you accidentally imported some data you didn't mean to or published a product when it wasn't ready to be published, or sending some changes to a revit file that you didn't meant to send.

Products Page

- The products page can be accessed by clicking on the Products button on the side bar.

Manager

Search for Products

Import CSV Create Product

Dashboard

Products 142 Found

Category Bulk Actions

<input type="checkbox"/>	PRODUCT NAME	CATEGORY	PUBLISHED	STATUS	LAST UPDATE	ACTIONS
<input type="checkbox"/>	Window-Awning-JELD-WEN-EpicVue WS	Windows	3/12/2019	Available	3/13/2019	
<input type="checkbox"/>	EpicVue Windows	Windows	3/12/2019	Available	4/17/2019	
<input type="checkbox"/>	SPW - Triple Glaze Clad ASPEN Casement Operable	Windows	4/15/2019	Available	4/17/2019	
<input type="checkbox"/>	Ultra-CrankOutFrenchCasement	Windows	Unpublished	Available	1/18/2019	
<input type="checkbox"/>	Window-Awning-JELD-WEN-EpicVue BO	Windows	3/12/2019	Available	3/12/2019	
<input type="checkbox"/>	Window-Double_Hung-JELD-WEN-Picture-Sash_Back-Siteline-All_Wood	Windows	Unpublished	Available	3/13/2019	
<input type="checkbox"/>	Pella Architect Series Casement Window Fixed	Windows	12/20/2018	Available	4/17/2019	
<input type="checkbox"/>	Window-Awning-JELD-WEN-EpicVue AC	Windows	3/12/2019	Available	3/13/2019	

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I. Products Page Overview

- The products page is where you can view all of your products that have been created using the SmartBIM Manager, as well as utilize a variety of bulk actions in relation to publishing, exporting data, deletion and download.
- The products page allows you to view any product's detailed information that you have created using the SmartBIM manager by clicking on the product's name from this page.

Manager Search for Products

Import CSV Create Product

Dashboard Products Insights ADMIN Attributes Job Queue Users Collapse

Products
142 Found

Category Bulk Actions

	PRODUCT NAME	CATEGORY	PUBLISHED	STATUS	LAST UPDATE	ACTIONS
<input type="checkbox"/>	Window-Awning-JELD-WEN-EpicVue WS	Windows	3/12/2019	Available	3/13/2019	
<input type="checkbox"/>	SPW - Triple Glaze Clad ASPEN Casement Operable	Windows	4/15/2019	Available	4/17/2019	
<input type="checkbox"/>	EpicVue Windows	Windows	3/12/2019	Available	4/17/2019	
<input type="checkbox"/>	Ultra-CrankOutFrenchCasement	Windows	Unpublished	Available	1/18/2019	
<input type="checkbox"/>	Window-Double_Hung-JELD-WEN-Picture-Sash_Back-Siteline-All_Wood	Windows	Unpublished	Available	3/13/2019	

<https://gdfstudio.sb-manager.com/dashboard/products/b6402031-baf9-4b47-9603-e8e2ac94751b>

II. Sorting By Header

- You can sort your products by clicking on any of the following headers.
 - Product name (Sorted by default A-Z. Clicking the header sorts the products from Z-A).
 - Category (Clicking once sorts products by Category A-Z, clicking again sorts products from Z-A)
 - Published (Clicking once sorts by most recent publish, clicking again sorts by oldest publish or if there have been no products published, clicking a second time would sort the unpublished products first.)
 - Last Update (Clicking once sorts by most recent update to a product, clicking again sorts by oldest update to a product).

III. Sorting Via Sort Button

- There is an alternate way to sort as well by utilizing the sort button located above the status header.

[Import CSV](#)
[+ Create Product](#)

[Dashboard](#)
[Products](#)
[Insights](#)

ADMIN

[Attributes](#)
[Job Queue](#)
[Users](#)

Products

165 Found

Sort

Bulk Actions

<input type="checkbox"/>	PRODUCT NAME	CATEGORY	PUBLISHED	STATUS	LAST UPDATE	ACTIONS
<input type="checkbox"/>	32" x 60" Center Drain Pre-Sloped Shower Tray	Shower System Components	Unpublished	Available	4/22/2019	
<input type="checkbox"/>	Acoustical Panel - USG Astro	Ceilings	3/6/2019	Available	3/6/2019	
<input type="checkbox"/>	Acoustical Panel - USG Clean Room	Ceilings	3/6/2019	Available	3/6/2019	
<input type="checkbox"/>	Acoustical Panel - USG Eclipse	Ceilings	3/6/2019	Available	3/6/2019	
<input type="checkbox"/>	Acoustical Panel - USG Frost	Ceilings	3/13/2019	Available	3/13/2019	
<input type="checkbox"/>	Acoustical Panel - USG Halcyon	Ceilings	12/27/2018	Available	3/13/2019	
<input type="checkbox"/>	Acoustical Panel - USG Halcyon Logix Panels	Ceilings	3/6/2019	Available	3/6/2019	
<input type="checkbox"/>	Acoustical Panel - USG Kitchen Lay-In Panel	Ceilings	3/28/2019	Available	3/28/2019	

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- By clicking this button, you will see a dropdown menu with all sortable options. Select your desired sorting method from the dropdown menu, and your products will be sorted appropriately.

[Import CSV](#)
[+ Create Product](#)

[Dashboard](#)
[Products](#)
[Insights](#)

ADMIN

[Attributes](#)
[Job Queue](#)
[Users](#)

Products

165 Found

Sort

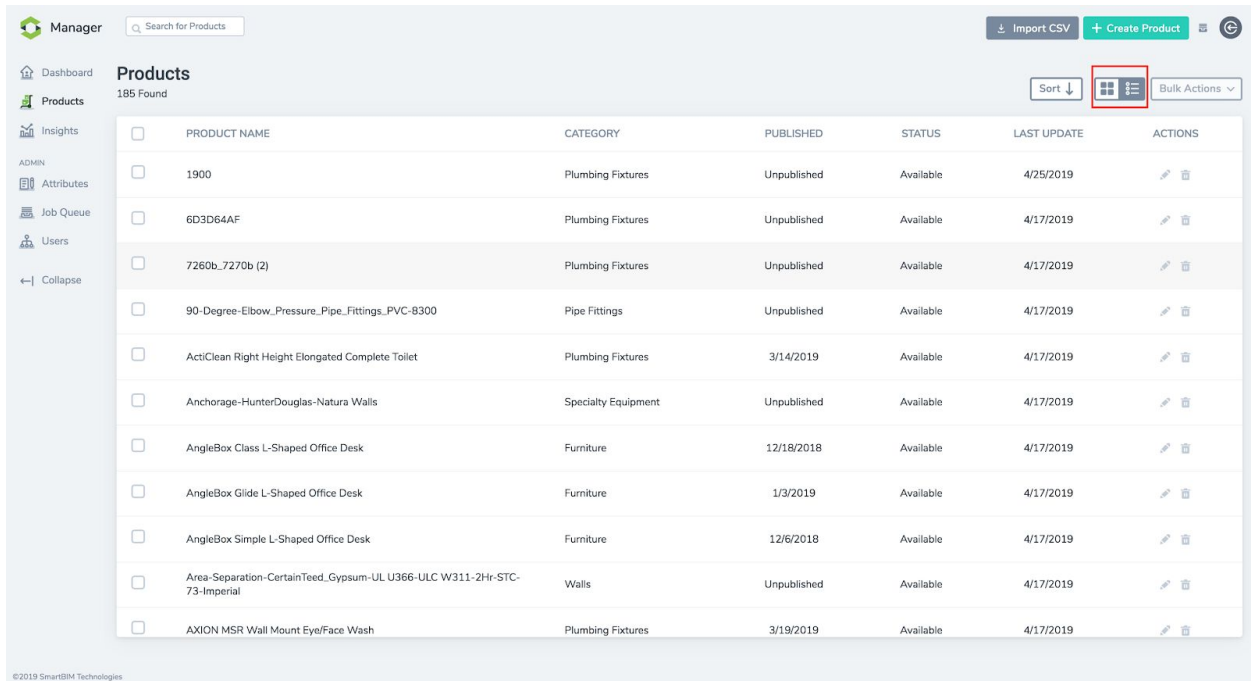
Bulk Actions

<input type="checkbox"/>	PRODUCT NAME	CATEGORY	PUBLISHED	STATUS	LAST UPDATE	ACTIONS
<input type="checkbox"/>	32" x 60" Center Drain Pre-Sloped Shower Tray	Shower System Components	Unpublished	Available	4/22/2019	
<input type="checkbox"/>	Acoustical Panel - USG Astro	Ceilings	3/6/2019	Available	3/6/2019	
<input type="checkbox"/>	Acoustical Panel - USG Clean Room	Ceilings	3/6/2019	Available	3/6/2019	
<input type="checkbox"/>	Acoustical Panel - USG Eclipse	Ceilings	3/6/2019	Available	3/6/2019	
<input type="checkbox"/>	Acoustical Panel - USG Frost	Ceilings	3/13/2019	Available	3/13/2019	
<input type="checkbox"/>	Acoustical Panel - USG Halcyon	Ceilings	12/27/2018	Available	3/13/2019	
<input type="checkbox"/>	Acoustical Panel - USG Halcyon Logix Panels	Ceilings	3/6/2019	Available	3/6/2019	
<input type="checkbox"/>	Acoustical Panel - USG Kitchen Lay-In Panel	Ceilings	3/28/2019	Available	3/28/2019	

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IV. Product Display Button

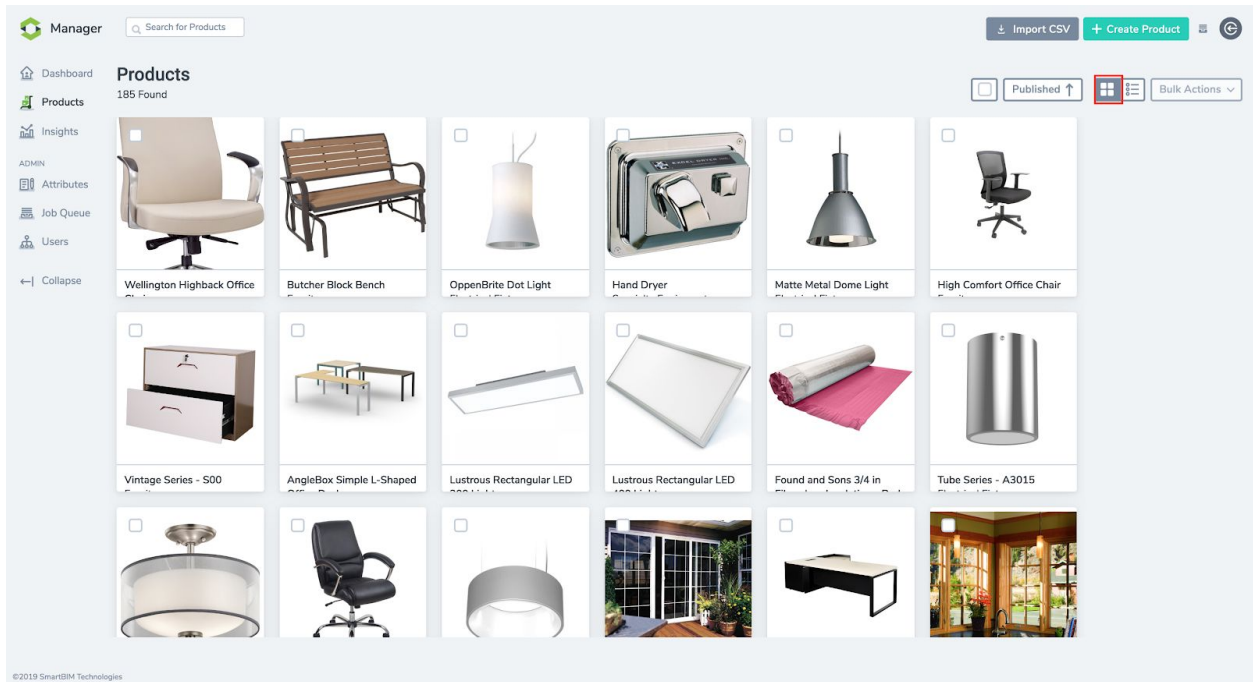
- There are two different ways to view products: list view and grid view. By default, the Design Manager displays all products in list view.



The screenshot shows the 'Products' section of the Design Manager interface. The page title is 'Products' with a subtitle '185 Found'. On the left is a sidebar with navigation links: Dashboard, Products, Insights, ADMIN, Attributes, Job Queue, and Users. The main content area displays a table of products. The table has columns: PRODUCT NAME, CATEGORY, PUBLISHED, STATUS, LAST UPDATE, and ACTIONS. The first few rows of the table are visible. In the top right corner, there are buttons for 'Import CSV', 'Create Product', and a view toggle. The view toggle consists of two icons: a list view icon (three horizontal lines) and a grid view icon (a 2x2 square grid). The list view icon is currently selected and highlighted with a red box. Below the view toggle is a 'Bulk Actions' dropdown menu.

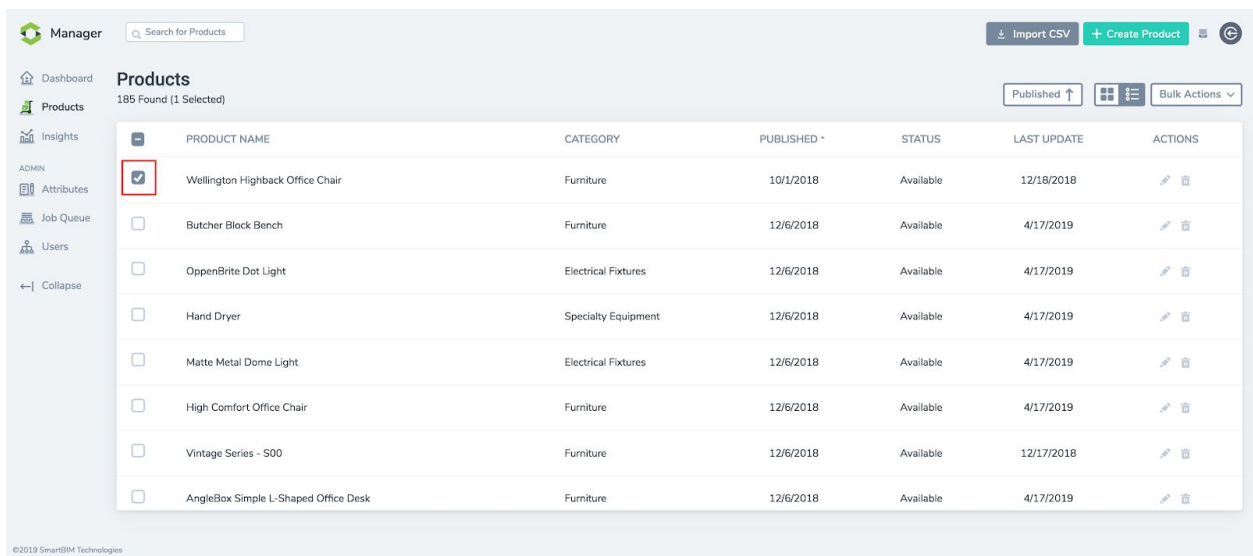
<input type="checkbox"/>	PRODUCT NAME	CATEGORY	PUBLISHED	STATUS	LAST UPDATE	ACTIONS
<input type="checkbox"/>	1900	Plumbing Fixtures	Unpublished	Available	4/25/2019	
<input type="checkbox"/>	6D3D64AF	Plumbing Fixtures	Unpublished	Available	4/17/2019	
<input type="checkbox"/>	7260b_7270b (2)	Plumbing Fixtures	Unpublished	Available	4/17/2019	
<input type="checkbox"/>	90-Degree-Elbow_Pressure_Pipe_Fittings_PVC-8300	Pipe Fittings	Unpublished	Available	4/17/2019	
<input type="checkbox"/>	ActiClean Right Height Elongated Complete Toilet	Plumbing Fixtures	3/14/2019	Available	4/17/2019	
<input type="checkbox"/>	Anchorage-HunterDouglas-Natura Walls	Specialty Equipment	Unpublished	Available	4/17/2019	
<input type="checkbox"/>	AngleBox Class L-Shaped Office Desk	Furniture	12/18/2018	Available	4/17/2019	
<input type="checkbox"/>	AngleBox Glide L-Shaped Office Desk	Furniture	1/3/2019	Available	4/17/2019	
<input type="checkbox"/>	AngleBox Simple L-Shaped Office Desk	Furniture	12/6/2018	Available	4/17/2019	
<input type="checkbox"/>	Area-Separation-CertainTeed_Gypsum-UL U366-ULC W311-2Hr-STC-73-Imperial	Walls	Unpublished	Available	4/17/2019	
<input type="checkbox"/>	AXION MSR Wall Mount Eye/Face Wash	Plumbing Fixtures	3/19/2019	Available	4/17/2019	

- To change the display to grid view, click the grid view button.

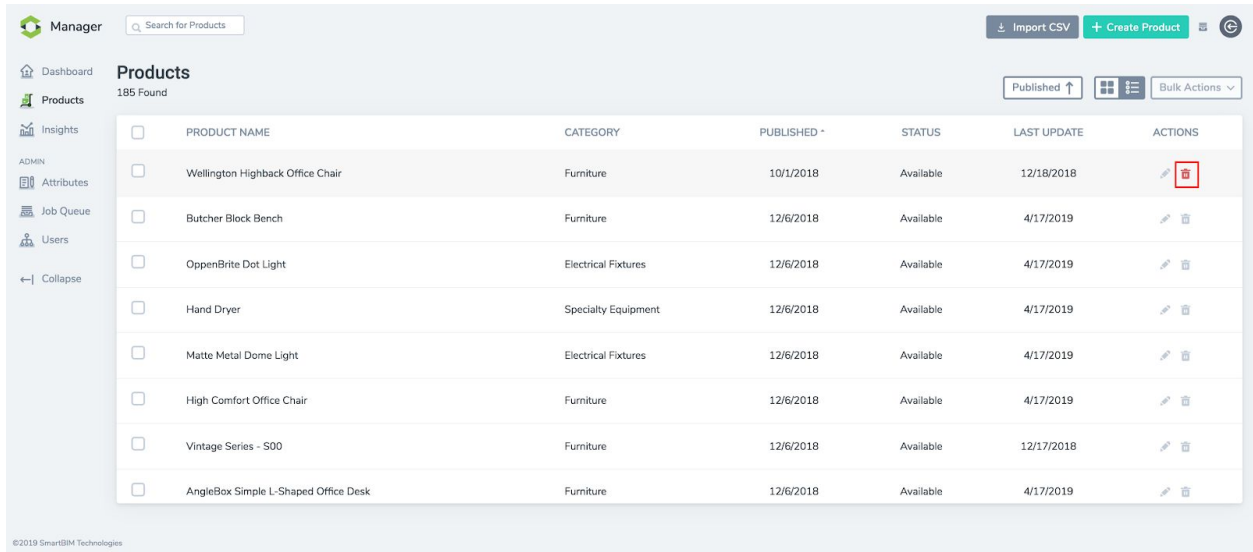


V. Interacting with products from the Products Page

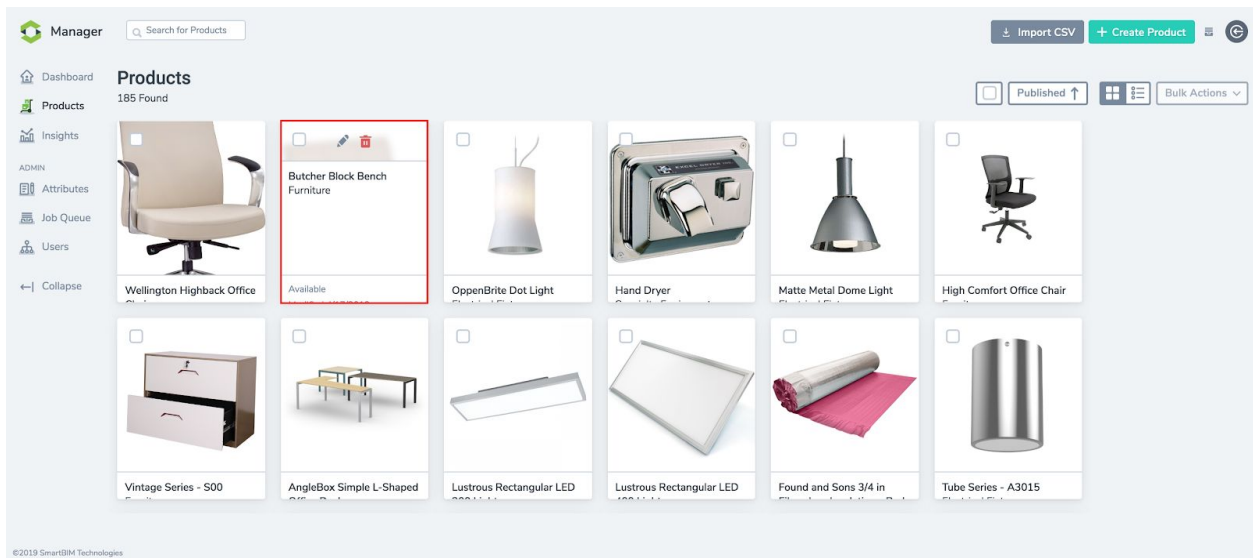
- To select a product, click the checkbox next to the product.



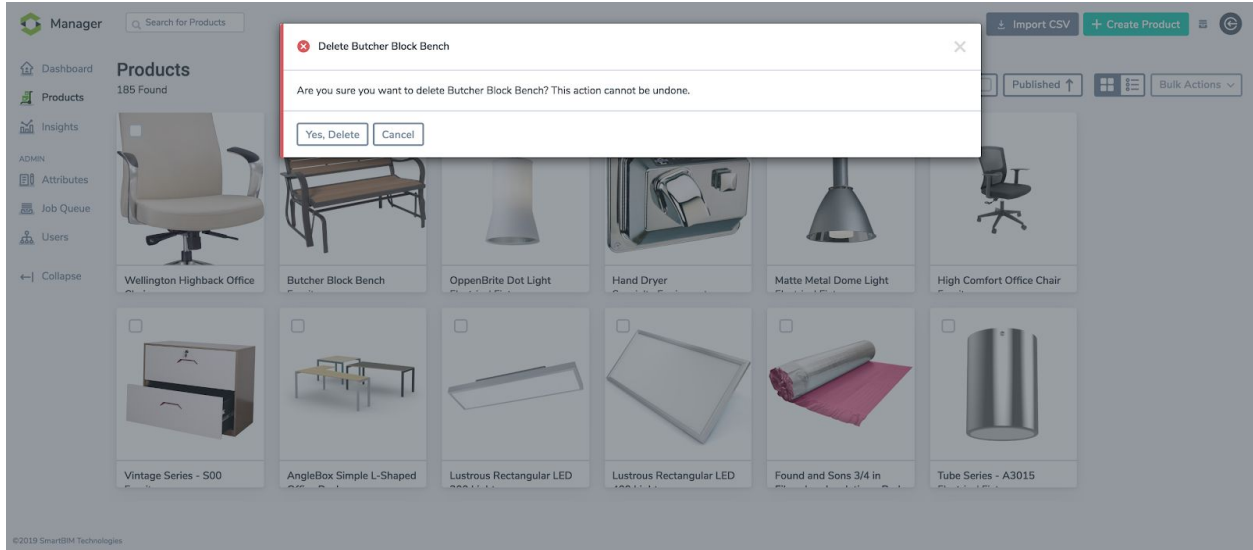
- To delete a single product, click the trash can symbol under the actions header in list view.



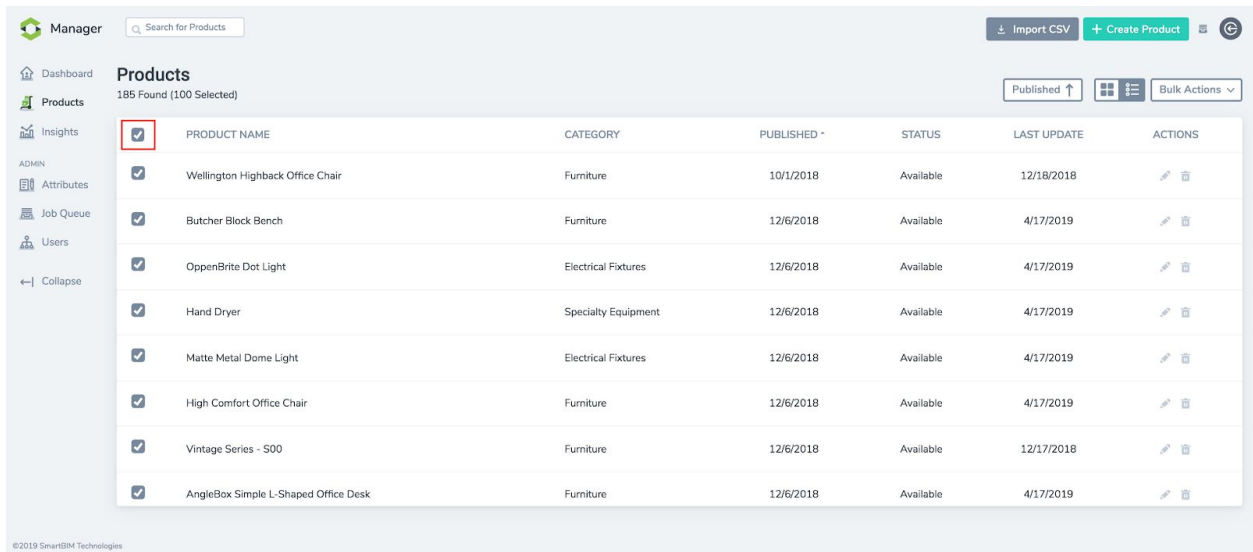
- To delete a product in grid view, hover your mouse over a product and then click the delete button.



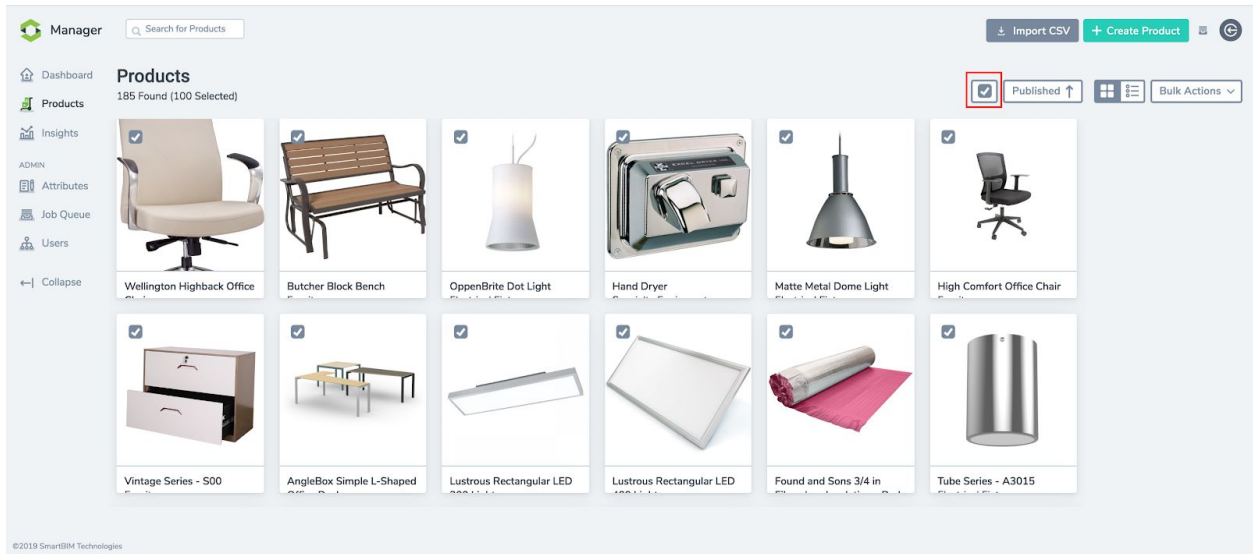
- A confirmation modal will appear after you attempt to delete a product. Click the confirm button to delete the product from the Design Manager.



- To select all loaded products in list view, click the checkbox next to the product name header.

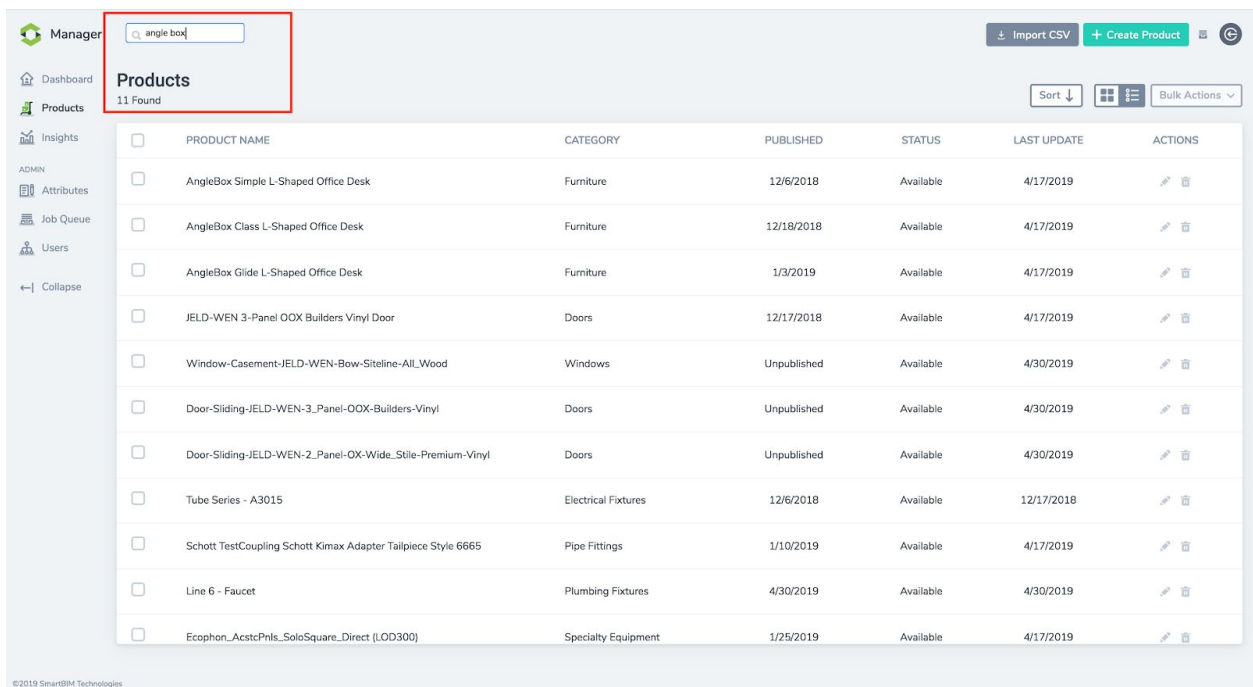


- To select all loaded products in grid view, click the checkbox next to the product name.



VI. Search

- To search for products, click the search bar above the header and enter your query.
- Users should enter relevant data when searching for products by name or category.
- After entering your search query, results will be filtered based on your query.



- There is currently no filtering capability on the Design Manager.

Products Page Bulk Actions

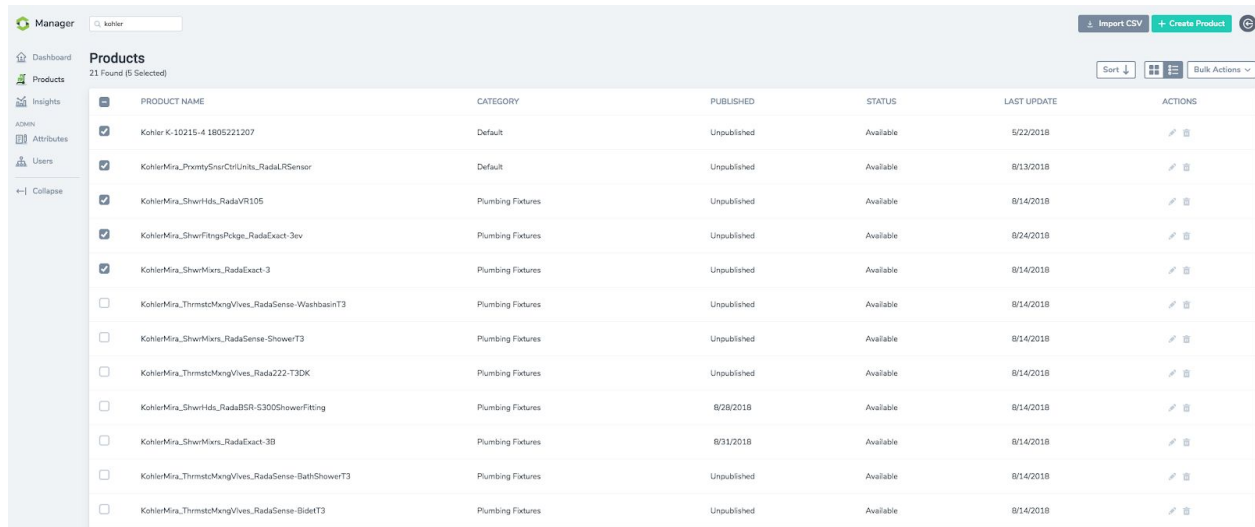
- Bulk Actions are paramount in maximizing time in the management of multiple existing products simultaneously.

Bulk Extract of Revit Families

- Affords users the ability to download multiple existing products and their attachments at once from the products page.

I. Select Products

- To select the products you would like to download, click the checkbox next to each desired product.



	PRODUCT NAME	CATEGORY	PUBLISHED	STATUS	LAST UPDATE	ACTIONS
<input checked="" type="checkbox"/>	Kohler K-10215-4 1805221207	Default	Unpublished	Available	5/22/2018	Edit Delete
<input checked="" type="checkbox"/>	KohlerMira_ProxmtySnsrCtrlUnits_RadaLRSensor	Default	Unpublished	Available	8/13/2018	Edit Delete
<input checked="" type="checkbox"/>	KohlerMira_SherHds_RadaVR105	Plumbing Fixtures	Unpublished	Available	8/14/2018	Edit Delete
<input checked="" type="checkbox"/>	KohlerMira_SherFittingsPckge_RadaExact-3ev	Plumbing Fixtures	Unpublished	Available	8/24/2018	Edit Delete
<input checked="" type="checkbox"/>	KohlerMira_SherMxrs_RadaExact-3	Plumbing Fixtures	Unpublished	Available	8/14/2018	Edit Delete
<input type="checkbox"/>	KohlerMira_ThrmstcMngVlves_RadaSense-WashbasinT3	Plumbing Fixtures	Unpublished	Available	8/14/2018	Edit Delete
<input type="checkbox"/>	KohlerMira_SherMxrs_RadaSense-ShowerT3	Plumbing Fixtures	Unpublished	Available	8/14/2018	Edit Delete
<input type="checkbox"/>	KohlerMira_ThrmstcMngVlves_Rada222-T3DK	Plumbing Fixtures	Unpublished	Available	8/14/2018	Edit Delete
<input type="checkbox"/>	KohlerMira_SherHds_RadaISR-6300ShowerFitting	Plumbing Fixtures	8/28/2018	Available	8/14/2018	Edit Delete
<input type="checkbox"/>	KohlerMira_SherMxrs_RadaExact-3B	Plumbing Fixtures	8/31/2018	Available	8/14/2018	Edit Delete
<input type="checkbox"/>	KohlerMira_ThrmstcMngVlves_RadaSense-BathShowerT3	Plumbing Fixtures	Unpublished	Available	8/14/2018	Edit Delete
<input type="checkbox"/>	KohlerMira_ThrmstcMngVlves_RadaSense-BidetT3	Plumbing Fixtures	Unpublished	Available	8/14/2018	Edit Delete

- Next, select the Bulk Actions menu.

The screenshot shows the 'Manager' interface with a search bar containing 'kohler'. The 'Products' section displays a table with 21 products. The 'Bulk Actions' menu is open, showing options: Bulk Publish, Bulk Download, Bulk Export Data, and Bulk Delete. The 'Bulk Download' option is highlighted.

PRODUCT NAME	CATEGORY	PUBLISHED	STATUS	LAST UPDATE
Kohler K-10215-4 1805221207	Default	Unpublished	Available	5/22/2018
KohlerMira_PremtySncrCtrlUnits_RadaLRSensor	Default	Unpublished	Available	8/13/2018
KohlerMira_ShwrHds_RadaVR105	Plumbing Fixtures	Unpublished	Available	8/14/2018
KohlerMira_ShwrFingsPckgs_RadaExact-3ev	Plumbing Fixtures	Unpublished	Available	8/24/2018
KohlerMira_ShwrMxrs_RadaExact-3	Plumbing Fixtures	Unpublished	Available	8/14/2018
KohlerMira_ThrmstcMngVlves_RadaSense-WashbasinT3	Plumbing Fixtures	Unpublished	Available	8/14/2018
KohlerMira_ShwrMxrs_RadaSense-ShowerT3	Plumbing Fixtures	Unpublished	Available	8/14/2018
KohlerMira_ThrmstcMngVlves_Rada222-T3DK	Plumbing Fixtures	Unpublished	Available	8/14/2018
KohlerMira_ShwrHds_RadaBSR-5300ShowerFitting	Plumbing Fixtures	8/28/2018	Available	8/14/2018
KohlerMira_ShwrMxrs_RadaExact-3B	Plumbing Fixtures	8/31/2018	Available	8/14/2018
KohlerMira_ThrmstcMngVlves_RadaSense-BathShowerT3	Plumbing Fixtures	Unpublished	Available	8/14/2018
KohlerMira_ThrmstcMngVlves_RadaSense-BidetT3	Plumbing Fixtures	Unpublished	Available	8/14/2018

- Click Bulk Download

This screenshot is identical to the one above, showing the 'Manager' interface with the same product list and the 'Bulk Actions' menu open, highlighting 'Bulk Download'.

- A zip file of all products selected will be downloaded.

II. Zip File Contents

- Clicking on the zip file will expose its contents. Each product downloaded will contain all of the products attachments that were stored on the Manager.
- This includes
 - RFA/RVT file(s)
 - Image files
 - A singular CSV of product data
 - A singular CSV of revit data
 - Any other attachment files that were uploaded to the product (CAD, SKP, etc.)

III. Zip File Arrangement

- Product contents are put into individual files.
- Product contents are also duplicated and are listed in alphabetical order.

Active Product Report

- Affords the user the ability to export product data and revit data simultaneously into two different CSV's that are downloaded to the user's computer.

I. Select Products

- To select the products you would like to export in an Active Product Report, click the checkbox next to each desired product either in list view or grid view.

	PRODUCT NAME	CATEGORY	PUBLISHED	STATUS	LAST UPDATE	ACTIONS
<input checked="" type="checkbox"/>	Kohler K-10215-4 1805221207	Default	Unpublished	Available	5/22/2018	Edit Delete
<input checked="" type="checkbox"/>	KohlerMira_PrivnttySnsr_CtrlUnits_RadaLRSensor	Default	Unpublished	Available	8/13/2018	Edit Delete
<input checked="" type="checkbox"/>	KohlerMira_SherwHds_RadaVR105	Plumbing Fixtures	Unpublished	Available	8/14/2018	Edit Delete
<input checked="" type="checkbox"/>	KohlerMira_SherwFtrngsPkge_RadaExact_3ev	Plumbing Fixtures	Unpublished	Available	8/24/2018	Edit Delete
<input checked="" type="checkbox"/>	KohlerMira_SherwMxns_RadaExact-3	Plumbing Fixtures	Unpublished	Available	8/14/2018	Edit Delete
<input type="checkbox"/>	KohlerMira_ThrmstMngVives_RadaSense-WashbasinT3	Plumbing Fixtures	Unpublished	Available	8/14/2018	Edit Delete
<input type="checkbox"/>	KohlerMira_SherwMxns_RadaSense-ShowerT3	Plumbing Fixtures	Unpublished	Available	8/14/2018	Edit Delete
<input type="checkbox"/>	KohlerMira_ThrmstMngVives_Rada222-T3DK	Plumbing Fixtures	Unpublished	Available	8/14/2018	Edit Delete
<input type="checkbox"/>	KohlerMira_SherwHds_RadaBSR-6300ShowerFitting	Plumbing Fixtures	8/28/2018	Available	8/14/2018	Edit Delete
<input type="checkbox"/>	KohlerMira_SherwMxns_RadaExact-3B	Plumbing Fixtures	8/31/2018	Available	8/14/2018	Edit Delete
<input type="checkbox"/>	KohlerMira_ThrmstMngVives_RadaSense-BathShowerT3	Plumbing Fixtures	Unpublished	Available	8/14/2018	Edit Delete
<input type="checkbox"/>	KohlerMira_ThrmstMngVives_RadaSense-SidetT3	Plumbing Fixtures	Unpublished	Available	8/14/2018	Edit Delete

- Next, select the Bulk Actions menu.

Manager

Dashboard Products Insights ADMIN Attributes Users Collapse

Products
21 Found (5 Selected)

Sort ↓ Bulk Actions

	PRODUCT NAME	CATEGORY	PUBLISHED	STATUS	LAST UPDATE	
<input checked="" type="checkbox"/>	Kohler K-10215-4 1805221207	Default	Unpublished	Available	5/22/2018	
<input checked="" type="checkbox"/>	KohlerMira_PremyGsrCtrlUnits_RadaLRSensor	Default	Unpublished	Available	8/13/2018	
<input checked="" type="checkbox"/>	KohlerMira_ShwrHds_RadaVR105	Plumbing Fixtures	Unpublished	Available	8/14/2018	
<input checked="" type="checkbox"/>	KohlerMira_ShwrFtngsPckgs_RadaExact-3ev	Plumbing Fixtures	Unpublished	Available	8/24/2018	
<input checked="" type="checkbox"/>	KohlerMira_ShwrMixrs_RadaExact-3	Plumbing Fixtures	Unpublished	Available	8/14/2018	
<input type="checkbox"/>	KohlerMira_ThrmstcMxngVlves_RadaSense-WashbasinT3	Plumbing Fixtures	Unpublished	Available	8/14/2018	
<input type="checkbox"/>	KohlerMira_ShwrMixrs_RadaSense-ShowerT3	Plumbing Fixtures	Unpublished	Available	8/14/2018	
<input type="checkbox"/>	KohlerMira_ThrmstcMxngVlves_Rada222-T3DK	Plumbing Fixtures	Unpublished	Available	8/14/2018	
<input type="checkbox"/>	KohlerMira_ShwrHds_RadaBSR-S300ShowerFitting	Plumbing Fixtures	8/28/2018	Available	8/14/2018	
<input type="checkbox"/>	KohlerMira_ShwrMixrs_RadaExact-3B	Plumbing Fixtures	8/31/2018	Available	8/14/2018	
<input type="checkbox"/>	KohlerMira_ThrmstcMxngVlves_RadaSense-BathShowerT3	Plumbing Fixtures	Unpublished	Available	8/14/2018	
<input type="checkbox"/>	KohlerMira_ThrmstcMxngVlves_RadaSense-BidetT3	Plumbing Fixtures	Unpublished	Available	8/14/2018	

Bulk Publish
Bulk Download
Bulk Export Data
Bulk Delete

- Click Bulk Export data.

Manager

Dashboard Products Insights ADMIN Attributes Users Collapse

Products
21 Found (8 Selected)

Last Update ↓ Bulk Actions

	PRODUCT NAME	CATEGORY	PUBLISHED	STATUS	LAST UPDATE	
<input checked="" type="checkbox"/>	KohlerMira_ShwrMixrs_RadaExact-3B	Plumbing Fixtures	8/31/2018	Available	11/19/2018	
<input checked="" type="checkbox"/>	KohlerMira_ShwrFtngsPckgs_RadaExact-3ev	Plumbing Fixtures	Unpublished	Available	8/24/2018	
<input checked="" type="checkbox"/>	KohlerMira_ThrmstcMxngVlves_RadaSense-WashbasinT3	Plumbing Fixtures	Unpublished	Available	8/14/2018	
<input checked="" type="checkbox"/>	KohlerMira_ShwrMixrs_RadaExact-3	Plumbing Fixtures	Unpublished	Available	8/14/2018	
<input checked="" type="checkbox"/>	KohlerMira_ShwrMixrs_RadaSense-ShowerT3	Plumbing Fixtures	Unpublished	Available	8/14/2018	
<input checked="" type="checkbox"/>	KohlerMira_ThrmstcMxngVlves_Rada222-T3DK	Plumbing Fixtures	Unpublished	Available	8/14/2018	
<input checked="" type="checkbox"/>	KohlerMira_ShwrHds_RadaBSR-S300ShowerFitting	Plumbing Fixtures	8/28/2018	Available	8/14/2018	

Bulk Publish
Bulk Download
Bulk Export Data
Bulk Delete

- A zip file containing all products' selected data will be downloaded.

II. Zip File Contents

- Unzipping the file will reveal to CSV's.
 - A product data CSV that is representative of all data in the "Product Details" section of a product or products on the manager that you selected for download.
 - A revit data CSV that is representative of all data in the "Revit" section of a product or products on the manager that you selected for download.

Bulk Update Via CSV

- Affords the user the ability to utilize a CSV file to edit and delete existing products.
- Affords the user the ability to utilize a CSV file to create new products.
- Note: The Active Product Report CSV that you download should be used to perform any bulk update operations.
- Note: The Active Product Report CSV can be used with any software that is able to open and edit CSV files. It is recommended to use Microsoft Excel or Google sheets.

Product Data CSV

- The Product Data CSV only contains data pertaining to the “Product” Data tab on the Product Details page of a product in the manager.
- The Product Data CSV is the CSV needed in order to create, edit, or delete products. You cannot create or delete products using the Revit data CSV.

I. Product Data CSV- Action column

- Create, edit and delete actions are performed in the “Action” column.
- Entering “update” in the action column next to a corresponding product will instruct the Manager upon import of the CSV to update the data corresponding to that product.
- Entering “create” in the action column next to a corresponding product will instruct the Manager upon import of the CSV to create a new product.
- Entering “remove” or “delete” in the action column next to a corresponding product will instruct the Manager upon import of the CSV to delete that product.
- The user has the ability to create a new product or products, delete an existing product or products or update an existing product or products within the same CSV if they so desire.

II. Manufacturer Column

- Lists the manufacturer of the products listed in the Active Product Report.

- Can be edited to whatever the user desires.

III. Manufacturer ID Column

- How Smartbim Technologies identifies the tenant that is using the CSV. Editing this data will not service the tenant in any way.
- Note: When creating a new product, this column will be blank next to the product that is to be created. It is not necessary to enter the manufacturer ID when creating a new product.

IV. Product Column

- This Column lists the name of the product.
- Can be edited to whatever the user desires.

V. Product ID Column

- How Smartbim Technologies identifies each product in the CSV. Editing this data will not service the tenant in any way and should not be altered.
- Note: When creating a new product, this column will be blank next to the product that is to be created. Please do not enter a ID when creating a product in this column or the product will not be created.

VI. Revit File Column

- Displays the Revit file (if applicable) that is attached to the product.

VII. Revit Type Catalog Column

- Displays the Revit type catalog (if applicable) that is attached to the product.

VIII. Revit Lookup Table Column

- Displays the Revit Lookup Table (if applicable) that is attached to the product.

IX. Revit IES Profile Column

- Displays the Revit IES Profile (if applicable) that is attached to the product.

X. Category Column

- Displays the Category that is attached to the product which is derived from the Revit file.

XI. Date Created Column

- Displays the date when the product was originally created.

XII. Last Updated Column

- Displays the date when the product was last updated in the Manager.

XIII. Last Published Column

- Displays the date when the product was last published in the Manager.

XIV. Product_Image_URL

- Displays the URL that is used to present the key image of the product on its product details page.
- Use this column to set the image (by entering an external URL) that will be displayed on a product's product details page. It will also include the image to the product as one of the product's attachments.

XV. Revit_File_URL

- Displays the URL that is used as the product's main Revit file.
- When the Active Product Report is imported with the correct Revit file URL, we will populate the product's data with the data derived from this CSV.

XVI. Additional Columns

- Additional headers can be added to the existing CSV by clicking a blank header column and entering a name for the new product information which will create a new attribute for the products upon import of the CSV.

- These additional columns are not part of the default columns (sections I-XV) that will always be included in the active product report. However, if the user has created additional attributes in the Manger for a product, they will be included upon downloading the Active Product Report.
- Entering any data in the cells below an additional column will then add the new attribute and the data pertaining to the new attribute to the products included within the CSV.
- Note: Additional columns may already be included in the Product Data CSV when initially downloaded.

XVII. Deleting Columns

- The user can delete columns within the CSV. The following columns cannot be deleted: **Product Column, Product ID column, Action column**. Doing so will not allow your CSV to be imported.

Bulk Publish





















- To bulk publish products, select the products you wish to bulk publish via checkbox selection.
- Next, click the bulk publish button.
- Click Bulk Publish.

Manager

Dashboard Products Insights ADMIN Attributes Job Queue Users Collapse

Products
186 Found (100 Selected)

Sort Bulk Actions

<input checked="" type="checkbox"/>	PRODUCT NAME	CATEGORY	PUBLISHED	STATUS	LAST UPDATE	
<input checked="" type="checkbox"/>	1900	Plumbing Fixtures	Unpublished	Available	4/25/2019	
<input checked="" type="checkbox"/>	6D3D64AF	Plumbing Fixtures	Unpublished	Available	4/17/2019	 
<input checked="" type="checkbox"/>	7260b_7270b (2)	Plumbing Fixtures	Unpublished	Available	4/17/2019	 
<input checked="" type="checkbox"/>	90-Degree-Elbow_Pressure_Pipe_Fittings_PVC-8300	Pipe Fittings	Unpublished	Available	4/17/2019	 
<input checked="" type="checkbox"/>	ActiClean Right Height Elongated Complete Toilet	Plumbing Fixtures	3/14/2019	Available	4/17/2019	 
<input checked="" type="checkbox"/>	Anchorage-HunterDouglas-Natura Walls	Specialty Equipment	Unpublished	Available	4/17/2019	 
<input checked="" type="checkbox"/>	AngleBox Class L-Shaped Office Desk	Furniture	12/18/2018	Available	4/17/2019	 
<input checked="" type="checkbox"/>	AngleBox Glide L-Shaped Office Desk	Furniture	1/3/2019	Available	4/17/2019	 
<input checked="" type="checkbox"/>	AngleBox Simple L-Shaped Office Desk	Furniture	12/6/2018	Available	4/17/2019	 
<input checked="" type="checkbox"/>	Area-Separation-CertainTeed_Gypsum-UL U366-ULC W311-2Hr-STC-73-Imperial	Walls	Unpublished	Available	4/17/2019	 
<input checked="" type="checkbox"/>	AXION MSR Wall Mount Eye/Face Wash	Plumbing Fixtures	3/19/2019	Available	4/17/2019	 

https://gdfstudio.sb-manager.com/dashboard/products#

Bulk Publish

Bulk Download

Bulk Export Data

Bulk Delete























- Confirm that you wish bulk publish on the bulk publish confirmation modal.

Manager

Dashboard Products Insights ADMIN Attributes Job Queue Users Collapse

Products
186 Found (100 Selected)

Sort Bulk Actions

<input checked="" type="checkbox"/>	PRODUCT NAME	CATEGORY	PUBLISHED	STATUS	LAST UPDATE	ACTIONS
<input checked="" type="checkbox"/>	1900	Plumbing Fixtures	Unpublished	Available	4/25/2019	 
<input checked="" type="checkbox"/>	6D3D64AF	Plumbing Fixtures	Unpublished	Available	4/17/2019	 
<input checked="" type="checkbox"/>	7260b_7270b (2)	Plumbing Fixtures	Unpublished	Available	4/17/2019	 
<input checked="" type="checkbox"/>	90-Degree-Elbow_Pressure_Pipe_Fittings_PVC-8300	Pipe Fittings	Unpublished	Available	4/17/2019	 
<input checked="" type="checkbox"/>	ActiClean Right Height Elongated Complete Toilet	Plumbing Fixtures	3/14/2019	Available	4/17/2019	 
<input checked="" type="checkbox"/>	Anchorage-HunterDouglas-Natura Walls	Specialty Equipment	Unpublished	Available	4/17/2019	 
<input checked="" type="checkbox"/>	AngleBox Class L-Shaped Office Desk	Furniture	12/18/2018	Available	4/17/2019	 
<input checked="" type="checkbox"/>	AngleBox Glide L-Shaped Office Desk	Furniture	1/3/2019	Available	4/17/2019	 
<input checked="" type="checkbox"/>	AngleBox Simple L-Shaped Office Desk	Furniture	12/6/2018	Available	4/17/2019	 
<input checked="" type="checkbox"/>	Area-Separation-CertainTeed_Gypsum-UL U366-ULC W311-2Hr-STC-73-Imperial	Walls	Unpublished	Available	4/17/2019	 
<input checked="" type="checkbox"/>	AXION MSR Wall Mount Eye/Face Wash	Plumbing Fixtures	3/19/2019	Available	4/17/2019	 

Publish 100 Products

Are you sure you want to publish 100 Products?

Confirm

Cancel

©2019 SmartBIM Technologies

Bulk Delete

- To bulk delete products, select the products you wish to bulk delete via checkbox selection.
- Next, click the bulk actions button.
- Click Bulk Delete

The screenshot shows the Manager dashboard with the Products section. A table lists 185 products, with 4 selected. The Bulk Actions menu is open, showing options: Bulk Publish, Bulk Download, Bulk Export Data, and Bulk Delete.

	PRODUCT NAME	CATEGORY	PUBLISHED *	STATUS	LAST UPDATE	
<input checked="" type="checkbox"/>	Wellington Highback Office Chair	Ceilings	3 hours ago	Available	an hour ago	
<input checked="" type="checkbox"/>	Butcher Block Bench	Furniture	3 hours ago	Available	3 hours ago	
<input checked="" type="checkbox"/>	OppenBrite Dot Light	Electrical Fixtures	3 hours ago	Available	3 hours ago	
<input checked="" type="checkbox"/>	Modus - 50	Generic Models	4/30/2019	Available	4/30/2019	
<input type="checkbox"/>	Line 6 - Faucet	Plumbing Fixtures	4/30/2019	Available	4/30/2019	
<input type="checkbox"/>	Lutron Vive Product Line Specific Document	Default	4/25/2019	Available	4/25/2019	
<input type="checkbox"/>	Wireless_Hub-Lutron-Vive	Lighting Devices	4/25/2019	Available	4/25/2019	
<input type="checkbox"/>	Switch-Lutron-Pico_Wireless_Contr	Lighting Devices	4/25/2019	Available	4/25/2019	

URL: <https://gdfstudio.sb-manager.com/dashboard/products#>

- Confirm that you wish to delete on the bulk delete confirmation modal.

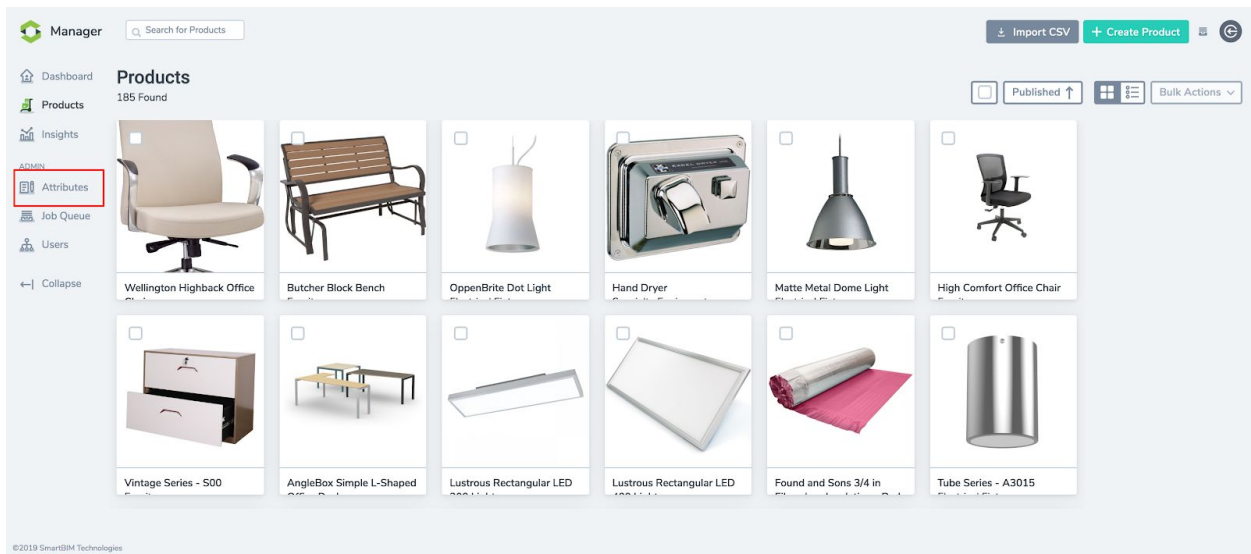
The screenshot shows the same Products list as the previous image, but with a confirmation modal open. The modal asks: "Delete 4 Products" and "Are you sure you want to delete 4 Products? This action cannot be undone." with "Yes, Delete" and "Cancel" buttons.

	PRODUCT NAME	CATEGORY	PUBLISHED *	STATUS	LAST UPDATE	ACTIONS
<input checked="" type="checkbox"/>	Wellington Highback Office Chair	Ceilings	3 hours ago	Available	an hour ago	
<input checked="" type="checkbox"/>	Butcher Block Bench	Furniture	3 hours ago	Available	3 hours ago	
<input checked="" type="checkbox"/>	OppenBrite Dot Light	Electrical Fixtures	3 hours ago	Available	3 hours ago	
<input checked="" type="checkbox"/>	Modus - 50	Generic Models	4/30/2019	Available	4/30/2019	
<input type="checkbox"/>	Line 6 - Faucet	Plumbing Fixtures	4/30/2019	Available	4/30/2019	
<input type="checkbox"/>	Lutron Vive Product Line Specific Document	Default	4/25/2019	Available	4/25/2019	
<input type="checkbox"/>	Wireless_Hub-Lutron-Vive	Lighting Devices	4/25/2019	Available	4/25/2019	
<input type="checkbox"/>	Switch-Lutron-Pico_Wireless_Contr	Lighting Devices	4/25/2019	Available	4/25/2019	

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Attribute Editor

- The attribute houses all attributes that you have uploaded or created in the system. These attributes can either be assigned to the Product Information section of a Product on the Design Manager (non Revit data) or the Revit section of a product on the Design Manager.
- The attribute editor can be found in the admin section on the side bar.




- Clicking this button will take the user to this page.
- For now, scroll past the shared Parameters section, we will cover that portion later in the user guide.

Attribute Editor

×

ATTRIBUTE LIBRARY

Create Attribute 

Of C Channels

of Hanger Rod

of Panel

of Wires

Of Wires

Of Wires Int

Of Wires Num

04 CSI

04 CSI

04 CSI

04 CSI

04 CSI

04 CSI

Edit or Create an Attribute

Use the column on the left to create an attribute or edit an already existing one.

Create

Cancel

- The attribute editor affords users the ability to edit existing attributes on their products, create new attributes for their products, remove attributes from their products, and add attributes to their products.
- The existing attributes are derived from the revit and product data that is already associated with existing products for the manufacturer and are all manufacturer specific. Each time you import a revit file, all of its attributes will be stored in the attribute editor.
- The Attribute Editor and its effects varies based on where it is accessed in terms of how it impacts a manufacturers' products globally or by just a single product. The Attribute Editor can be accessed from the Admin page (Global changes only) or on a product's product details page (Changes are local only to that product)

I. Admin Page Attribute Editor

- The following features are global changes, meaning that when the changes described below are made, they affect the attribute across all products they are attached to (Remove Attribute, Edit Attribute) or the attribute can now be used across all products on the Manager (Create Attribute).

II. Features

- **Delete Attribute:** Want to remove a superfluous attribute that is no longer relevant? Simply open the Attribute Editor from the Admin page, select the attribute from the attribute library and click Delete. Doing so will delete the attribute across all products that contain it on a manufacturer's Manager.

Attribute Editor ×

ATTRIBUTE LIBRARY

Create Attribute ⊕

04 CSI

04 CSI

95 CSI

95 CSI

95 CSI

95 CSI

95 CSI

95 CSI

Additional Resources Note

Air Flow - HVAC

Air Flow Density - HVAC

Air Flow divided by Cooling Load - HVAC

Air Flow divided by Volume - HVAC

Edit Attribute

Name

Air Flow Density - HVAC

Group

Parametric

Select a Type

number

Distribution Options

☒ Revit

Discipline

Common

Parameter Type

HVACAirflowDensity

Parameter Group

Mechanical - Flow

☒ Type ☐ Instance

Save

Delete

Cancel

- **Edit Attribute:** If an attribute needs to be modified it can be done so from the Attribute editor. Open the attribute editor, select the attribute you wish to edit on the left side of the page.

Attribute Editor✕

ATTRIBUTE LIBRARY

Create Attribute ⊕

Comments

Connection Type

Constraint

Construction Cover

Copyright

Cost

Created By

Crop Region Visible

Crop View

Current Revision

Current Revision Date

Current Revision Description

Edit Attribute

Name

Copyright

Group

Parametric

Select a Type

Text

Distribution Options

☒ Revit

Common

Text

Identity Data

☒ Type ☐ Instance

Save

Delete

Cancel

- Here, the user can modify the name, group, and type of the attribute as well as defining which section the attribute will appear once the product is published to the library under the Distribution Options section. The user can also set the attribute's discipline, parameter type, parameter group as well as setting if the attribute is a type or instance.
- Selecting the revit distribution option checkbox will ensure that the attribute is added to the revit subsection of the product details page when the attribute is added to the product.
- **Create Attribute:** Allows the user to create a new attribute by clicking the Create Attribute button from the Attribute Editor menu on the left side of the page. This will bring up a blank slate where the user will manually name the product and then edit the group, type and distribution options. This attribute can then be added to a product from a product's product details page, but not from this page.

Attribute Editor✕

ATTRIBUTE LIBRARY

Create Attribute ⊕

04 CSI

04 CSI

95 CSI

95 CSI

95 CSI

95 CSI

95 CSI

95 CSI

Additional Resources Note

Air Flow - HVAC

Air Flow Density - HVAC

Air Flow divided by Cooling Load - HVAC

Air Flow divided by Volume - HVAC

Create Attribute

Name

Group

General

Select a Type

text

Distribution Options

☒ Revit

Discipline

Common

Parameter Type

Text

Parameter Group

Identity Data

☒ Type ☐ Instance

Create Cancel

III. Local Changes

- **Add an attribute to a product:** From a product's product details page, the user can add or remove attributes to either the product information or the Revit data section.


Manager
Search for Products
+ Create Product

Dashboard
Edit & Publish Product
Download Delete Publish

Products
Insights
Admin
Collapse

Product Information
Revit

All
Mechanical
Identity Data
Electrical Loads
Text
Constraints
Geometry
Materials
Aeectrical
Green Building

Source Revit File


There is a Revit file associated to product data.

Update file with data

Import data from file

Revit File
Controller-Wall_Mounted-BigAssFan-SmartSense.rfa
Type Catalog
None
MEP Catalog
None
IES Profile
None

CREATED AT
8/30/2017, 11:27 am
UPDATED AT
4/23/2018, 4:57 pm

Type
Family: Standard

Add Attribute

Ambient Operating Temperature
Assembly Code
Connection Type
2-Conductor, Shielded Cables 18-22 Gauge Stranded

©2018 SmartBIM Technologies

- Clicking the “Add attribute button” will bring up a modal with all of a manufacturer's attributes. When the user selects an attribute, the add button will appear at the bottom of the modal. Clicking the Add button will add the attribute to the product.

Add or Remove an Attribute

ATTRIBUTE LIBRARY

Actual Extension Tube Length

Actual Fan Diameter

Airfoil Finish

Airfoil Finish Standard

Airfoil Finishes

Airfoil Material

Airfoil Material

Always vertical

Ambient Operating Temperature

Amperage

Amps Maximum

Amps Minimum

Apparent Load

Name

Airfoil Finish Standard

Group

Parametric

Select a Type

text

Distribution Options

☒ Revit

Discipline

Common

Parameter Type

Text

Parameter Group

Materials and Finishes

☒ Type ☐ Instance

☐ All Families

Add

- **Remove an attribute from a product:** From the product details page in the Revit subsection, you will see a number of attributes on a product after its data has been imported. Clicking on the trashcan icon on an attribute will cause a modal to appear.

Type	Family: Standard	ⓧ
Add Attribute ⓘ		
Ambient Operating Temperature		fx
Assembly Code		fx
Connection Type	2-Conductor, Shielded Cables 18-22 Gauge Stranded	fx
Controller		fx
CRI		fx
Default Elevation		in
Depth	= 1.1	fx
Description	= SmartSense Controller	fx
Display	Plastic - Big Ass Fan - Fine Textured - Black	fx
Efficacy		lm/W
Environment		fx

Add or Remove an Attribute

ATTRIBUTE LIBRARY

Actual Extension Tube Length

Actual Fan Diameter

Airfoil Finish

Airfoil Finish Standard

Airfoil Finishes

Airfoil Material

Airfoil Material

Always vertical

Ambient Operating Temperature

Amperage

Amps Maximum

Amps Minimum

Apparent Load

Name

Connection Type

Group

Parametric

Select a Type

text

Distribution Options

☒ Revit

Discipline

Common

Parameter Type

Text

Parameter Group

Electrical - Loads

☒ Type ☐ Instance

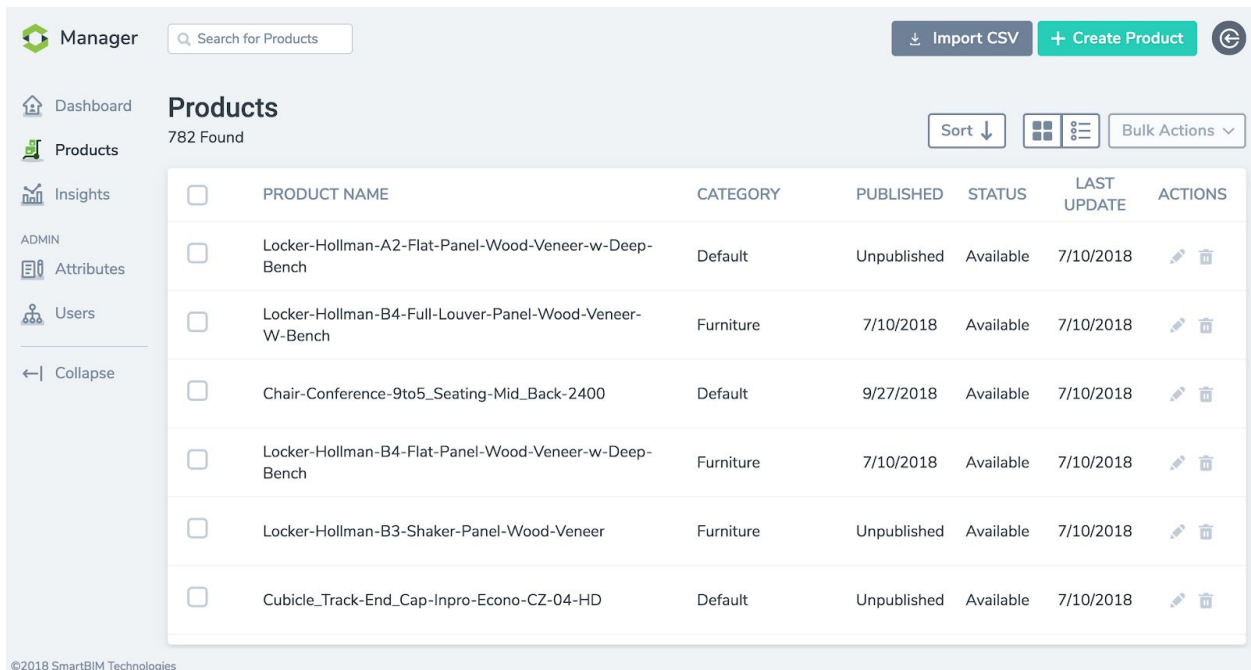
☐ All Families

Remove

- Clicking the remove button within the modal will allow the user to remove the attribute from the product. This modal acts as confirmation that the user does indeed want to remove the product. If you don't and made a mistake, you can close the modal and the attribute will remain attached to the product.

Importing Product Data CSV

- Utilizing the Product Data CSV found in the active product report, you can create, update or delete products in the Design Manager from the Product Data CSV. This CSV only contains data found in the Product Information section.
- After you have made your changes to the CSV file, save your CSV as a CSV file. Do not save it as an excel sheet, PDF or any other format.
- From any page, click the Import CSV button.



The screenshot shows the 'Manager' interface with a sidebar on the left containing links to Dashboard, Products, Insights, ADMIN, Attributes, and Users. The main content area is titled 'Products' and shows '782 Found'. At the top right of the main area are buttons for 'Import CSV' and 'Create Product'. Below the title are controls for 'Sort', view toggles, and 'Bulk Actions'. A table displays product data with columns: PRODUCT NAME, CATEGORY, PUBLISHED, STATUS, LAST UPDATE, and ACTIONS. The table contains seven rows of product information.

<input type="checkbox"/>	PRODUCT NAME	CATEGORY	PUBLISHED	STATUS	LAST UPDATE	ACTIONS
<input type="checkbox"/>	Locker-Hollman-A2-Flat-Panel-Wood-Veneer-w-Deep-Bench	Default	Unpublished	Available	7/10/2018	
<input type="checkbox"/>	Locker-Hollman-B4-Full-Louver-Panel-Wood-Veneer-W-Bench	Furniture	7/10/2018	Available	7/10/2018	
<input type="checkbox"/>	Chair-Conference-9to5_Seating-Mid_Back-2400	Default	9/27/2018	Available	7/10/2018	
<input type="checkbox"/>	Locker-Hollman-B4-Flat-Panel-Wood-Veneer-w-Deep-Bench	Furniture	7/10/2018	Available	7/10/2018	
<input type="checkbox"/>	Locker-Hollman-B3-Shaker-Panel-Wood-Veneer	Furniture	Unpublished	Available	7/10/2018	
<input type="checkbox"/>	Cubicle_Track-End_Cap-Inpro-Econo-CZ-04-HD	Default	Unpublished	Available	7/10/2018	

©2018 SmartBIM Technologies

- Drag and drop your CSV into the dropzone.

Import CSV



Import file(s) here.

Select Files

Drop files here

Start Processing

- You will receive a notification that your products have been created (this message will appear even if you only updated existing products. This is an issue that will be improved in the near future)

Manager

Dashboard

Products

Insights

ADMIN

Attributes

Users

Collapse

Import CSV

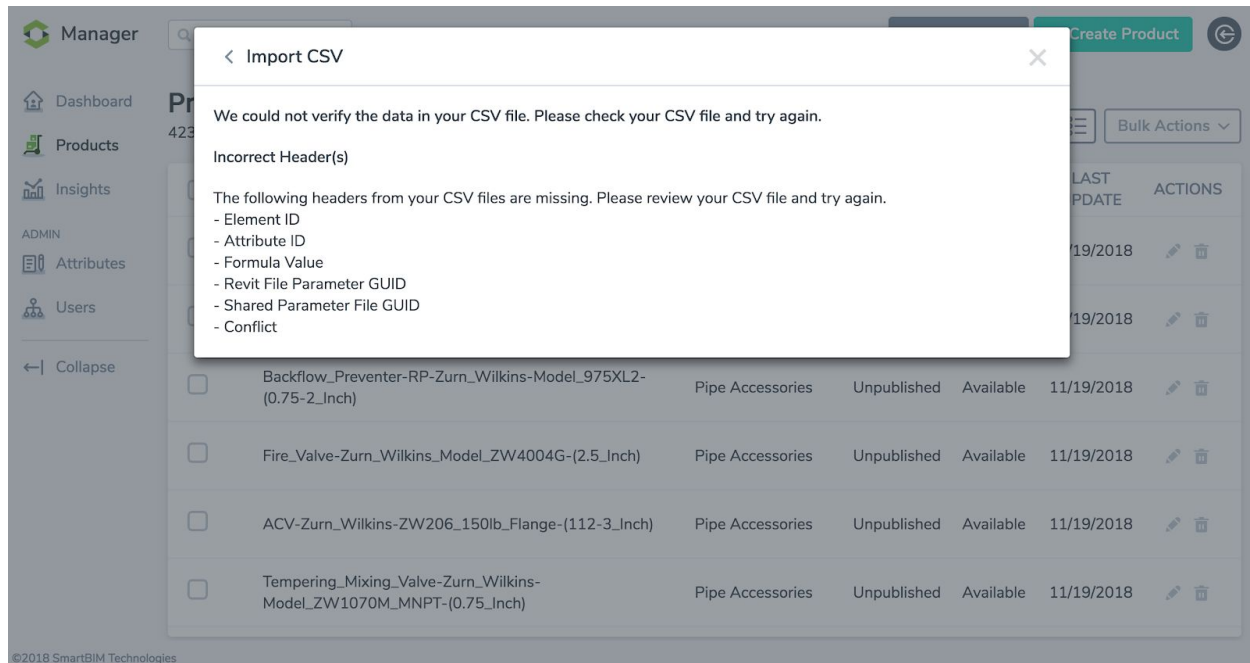
19 Products Created

PRODUCT NAME
Kohler K-10215-4 1805221207
Water-Cooler Smartbim
Water-Cooler Condenser Smartbim
Cooler-Beverage Smartbim
Grill-Roller Smartbim
Boiler-Commercial-Brute Deluxe- 500-2000 -rh Smartbim
Cooler Traveling Smartbim
Boiler-Commercial-Brute Deluxe- 500-2000 -lh Smartbim
KohlerMira_ShwrHds_RadaVR105
KohlerMira_ThrmstcMxngVlves_Rada222-T3DK

Water-Cooler Smartbim

©2018 SmartBIM Technologies

- If you made an error with your data regarding any required headers not being present in the CSV, you will receive the following message showing which headers are missing.



- Your changes to your products should now occur if there are no errors with missing headers.
- Importing the Product data CSV will only affect the product data of your products.
- You can only import one CSV at a time.

Revit Data CSV

- The Revit Data CSV is acquired from the Active Product Report.
- The Revit Data CSV only contains data pertaining to the “Revit” Data tab on the Product Details page of a product in the Manager.
- The Revit Data CSV is needed in order to edit Revit data in the context of the CSV.
- You cannot edit Revit data in the Product Data CSV.
- You cannot create or delete products in the Revit data CSV.
- The only data that can currently be edited in the Revit Data CSV is in the column titled, “Parameter Value”.

I. Revit Data CSV- Action column

- Edit actions are performed in the “Action” column.
- Entering “update” in the action column next to a corresponding product will instruct the Manager upon import of the CSV to update the data corresponding to that product.

II. Manufacturer Column

- Lists the manufacturer of the products listed in the Active Product Report.
- Can be edited to whatever the user desires.

III. Manufacturer ID Column

- How Smartbim Technologies identifies the tenant that is using the CSV. Editing this data will not service the tenant in any way.
- Note: When creating a new product, this column will be blank next to the product that is to be created. It is not necessary to enter the manufacturer ID when creating a new product.

IV. Product Column

- This Column lists the name of the product.
- Can be edited to whatever the user desires.

V. Product ID Column

- How Smartbim Technologies identifies each product in the CSV. Editing this data will not service the tenant in any way and should not be altered.
- Note: When creating a new product, this column will be blank next to the product that is to be created. Please do not enter a ID when creating a product in this column or the product will not be created.

VI. Revit File Column

- Displays the Revit file that is attached to the product.

VII. Revit Type Name Column

- Displays the Family Type name for the specific product.

VIII. Revit Family Type Column

- Displays what type of family is in the product or products.

IX. Instance or Type Parameter

- Displays whether the attribute is an instance or a type.

X. Attribute type ID

- How we internally identify the attribute.

XI. Parameter Section

- What section a parameter is placed in (e.g. identity data, plumbing, mechanical, etc.)

XII. Parameter Name

- The name of the Attribute in question.

XIII. Parameter Value

- The **only column** that can be edited currently in the Revit data CSV!
- The Parameter value is the only column that can be edited in the CSV. Changing the value here will update the text field relating to the Parameter name (e.g. editing the

parameter value for the attribute, “Weight” will update that product’s weight measurement upon import of the CSV).

XIV. Formula Value

- Shows formula value (if applicable for the attribute).

XV. Unit

- The unit of measurement related to the attribute.

XVI. Revit File Parameter GUID

- How we internally identify the Revit File Shared Parameter if that attribute is a shared parameter.

XVII. Shared Parameter File GUID

- How we internally identify the actual shared parameter file that the attribute’s data is derived from.

XVIII. Conflict

- If there is an issue with the attribute in relation to its shared parameter file or shared parameter GUID it will be stated here (if applicable).

XIX. Deleting Columns

- The user can delete columns within the CSV. The following columns cannot be deleted: **Action column, Element ID column, Attribute ID, Product ID column, Parameter Value column, and the Formula Value column, Revit File Parameter GUID, Shared Parameter File GUID, Conflict.** Doing so will not allow your CSV to be imported.

Importing Revit Data CSV

- After you have made your changes to the CSV file, save your CSV as a CSV file. Do not save it as an excel sheet, PDF or any other format. Remember, you cannot create or delete a product using the revit data CSV.
- From any page (after logging in), click the Import CSV button.

Manager

Import CSV

Create Product

Dashboard
Products
Insights
ADMIN
Attributes
Users
Collapse

Products

782 Found

Sort
Bulk Actions

	PRODUCT NAME	CATEGORY	PUBLISHED	STATUS	LAST UPDATE	ACTIONS
<input type="checkbox"/>	Locker-Hollman-A2-Flat-Panel-Wood-Veneer-w-Deep-Bench	Default	Unpublished	Available	7/10/2018	
<input type="checkbox"/>	Locker-Hollman-B4-Full-Louver-Panel-Wood-Veneer-W-Bench	Furniture	7/10/2018	Available	7/10/2018	
<input type="checkbox"/>	Chair-Conference-9to5_Seating-Mid_Back-2400	Default	9/27/2018	Available	7/10/2018	
<input type="checkbox"/>	Locker-Hollman-B4-Flat-Panel-Wood-Veneer-w-Deep-Bench	Furniture	7/10/2018	Available	7/10/2018	
<input type="checkbox"/>	Locker-Hollman-B3-Shaker-Panel-Wood-Veneer	Furniture	Unpublished	Available	7/10/2018	
<input type="checkbox"/>	Cubicle_Track-End_Cap-Inpro-Econo-CZ-04-HD	Default	Unpublished	Available	7/10/2018	

©2018 SmartBIM Technologies

- Drag and drop your CSV into the dropzone.

Import CSV



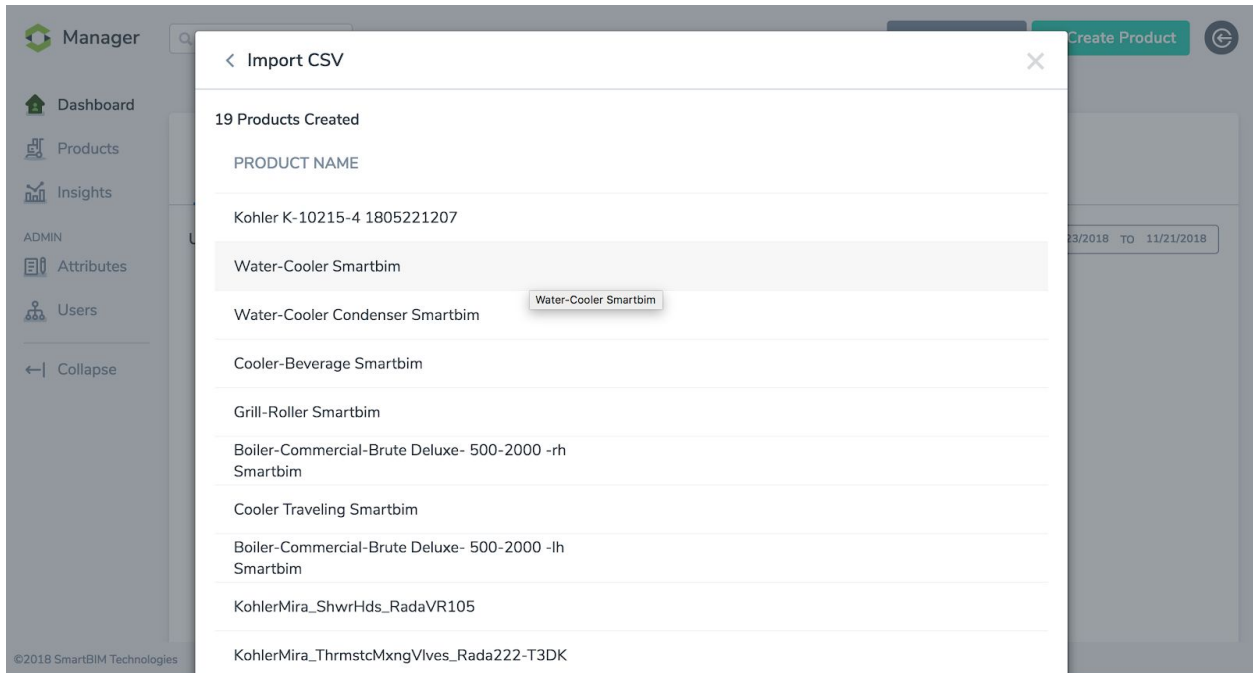
Import file(s) here.

Select Files

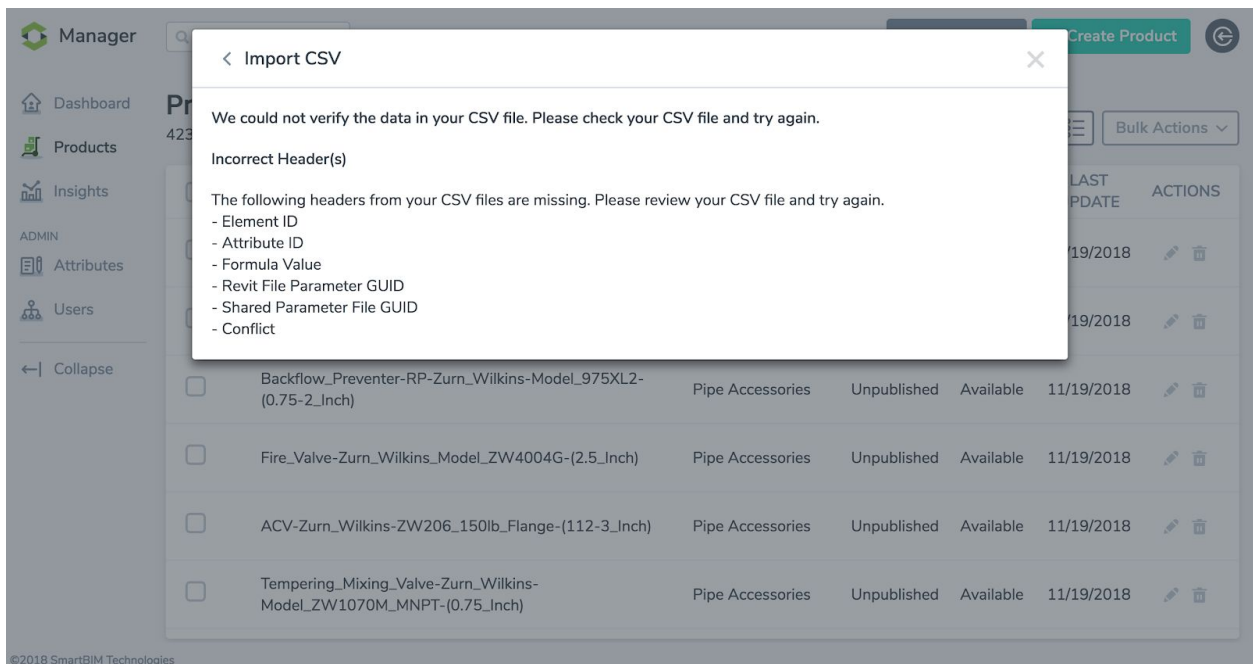
Drop files here

Start Processing

- You will receive a notification that your products have been created (this message will appear even if you only updated existing products. This is an issue that will be improved in the near future).



- Your changes to your products should now occur.
- If you made an error with your data regarding any required headers not being present in the CSV, you will receive the following message showing which headers are missing.



- Importing the Revit data CSV will only affect the Revit data of your products.
- You can only import one CSV at a time.

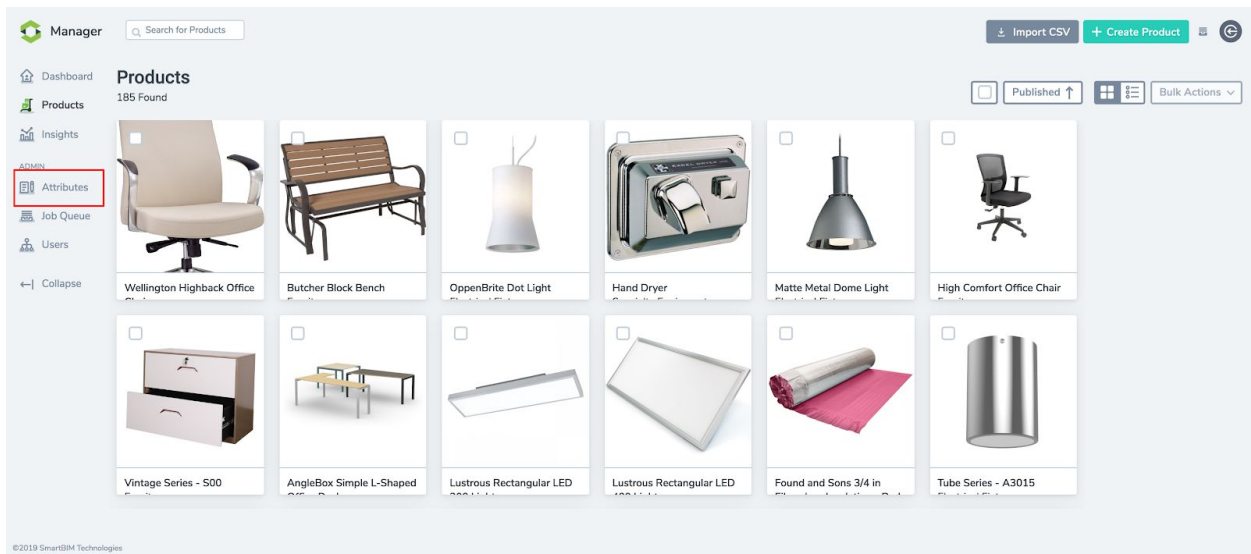
- Changes to your Revit data CSV will automatically write those changes to those products' corresponding revit files upon import only.

Shared Parameters

- With the shared Parameters feature, users now have the ability to upload shared parameter files and have the subsequent data be a part of their products and their manager.

I. Admin Page Access and Upload

- The Attributes page is where you go to upload and manage shared parameter files.



- To go to the shared parameters section of the manager, click on the attributes section under the admin header on the Manager sidebar.
- Drag and drop your shared parameter file into the dropzone to initiate the shared parameter file upload.


Shared Parameters

Add or update a shared parameter file

Instructions

Upload your Master Shared Parameters file by clicking the Select File button or by dragging a file into the dropzone.

Once the file is uploaded, we will process the file and map attributes from the shared parameter file to attributes in your System.

Shared parameters will have a  next to the name.

Shared Parameters File

Select Files

Drop a file here

UPLOADED

TOTAL PARAMETERS

Attribute Management

logies

- Your shared attributes will now be uploaded and added to your products.

Shared Parameters

Add or update a shared parameter file

Shared Parameters File

Kohler Shared Parameters.txt

Select New File

Download

Delete

UPLOADED

a few seconds ago

TOTAL PARAMETERS

- The shared parameters icon will be placed next to attributes that are shared parameters. You can view them from the Attribute editor if you scroll down the page. Shared parameters are marked with a “link” icon like the parameter that is highlighted in the menu below.

Attribute Management


Create, edit, or remove attributes from the attribute library


ATTRIBUTE LIBRARY

Create Attribute

of Main Runners Int


of Main Runners Num

 # of Panels

 # of Presets

of Racks


of Shelves


 # of Shutters

of Wires

of Wires Int

of Wires Num

 # Sections

 #2 Fuel Oil Input

Name

Of Shutters

Group

Parametric

Select a Type

number

Distribution Options

☒ Revit

Discipline

Common

Parameter Type

Integer

Parameter Group

Analysis Results

- Shared Parameter attributes **cannot** be edited.

II. Delete A Shared Parameter File

- To delete a shared parameter file, click the delete button.
- The shared parameter file will be removed.
- The attributes from the shared parameter will remain, but they will no longer be shared parameters.

III. Download A Shared Parameter File

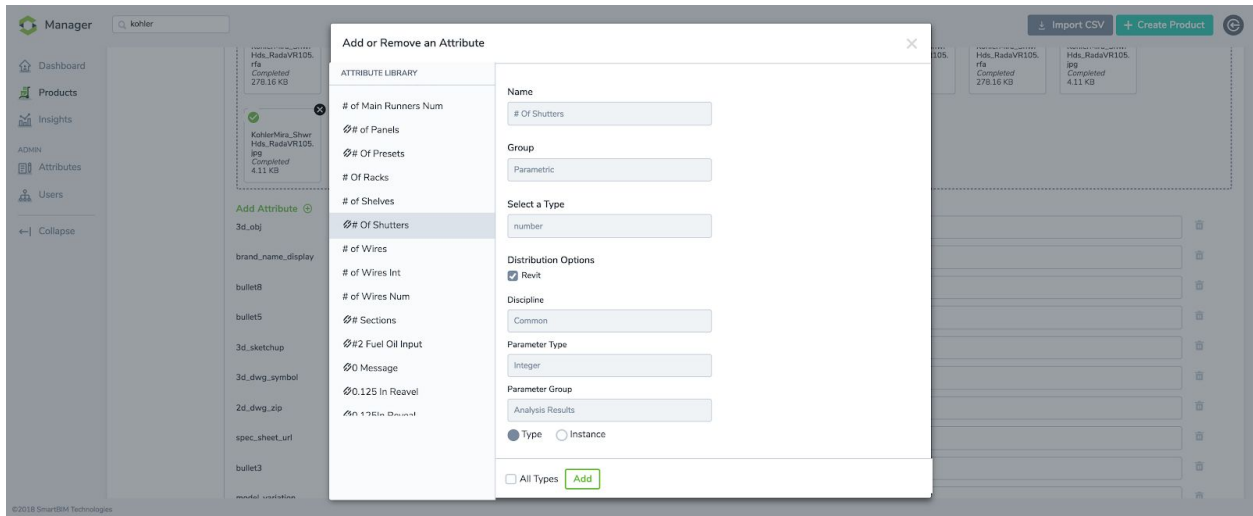
- To download a shared parameter file, click the download button.
- The shared parameter file will download to your local hard drive.

IV. Add A Shared Parameter File to a Product That Does Not Have One

- Select a product from the product page.
- Go to the revit tab and click the green add attribute button located below family types but above the actual revit data.

The screenshot shows the 'Revit' tab in a software interface. On the left is a sidebar with categories like 'All', 'Data', 'Geometry', etc. The main area is titled 'Source Revit File'. It contains a 'Revit File' dropdown menu with the value 'KohlerMira_ProxmtySnrCtrlUnits_RadaLRSensor.rfa'. Below this are three more dropdown menus: 'Type Catalog' (None), 'MEP Catalog' (None), and 'IES Profile' (None). A message box states 'There is a Revit file associated to product data.' with two buttons: 'Update file with data' and 'Import data from file'. At the bottom, there is a 'Type' dropdown menu set to 'Family: RadialRSensor' with a red error icon. Below that is a green 'Add Attribute' button. Underneath the button is a 'TimeConstant' input field with the value '0' and a 'general' dropdown menu.

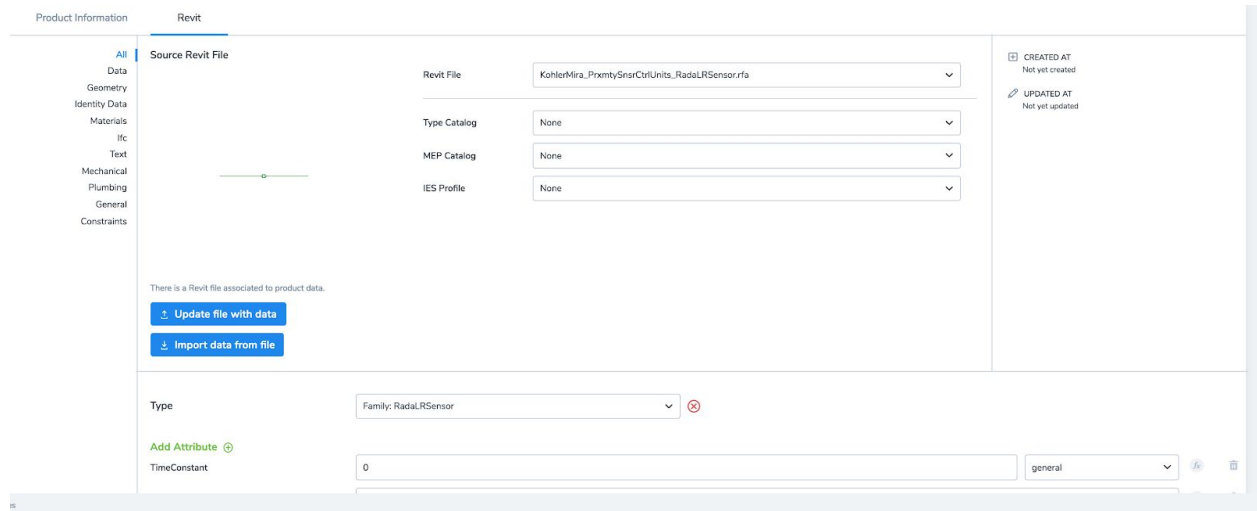
- Find the shared parameter attribute you wish to add to the product.
- Click on the shared parameter attribute.
- Click the green add button at the bottom of the modal.



- The shared parameter attribute will now be added to the product.

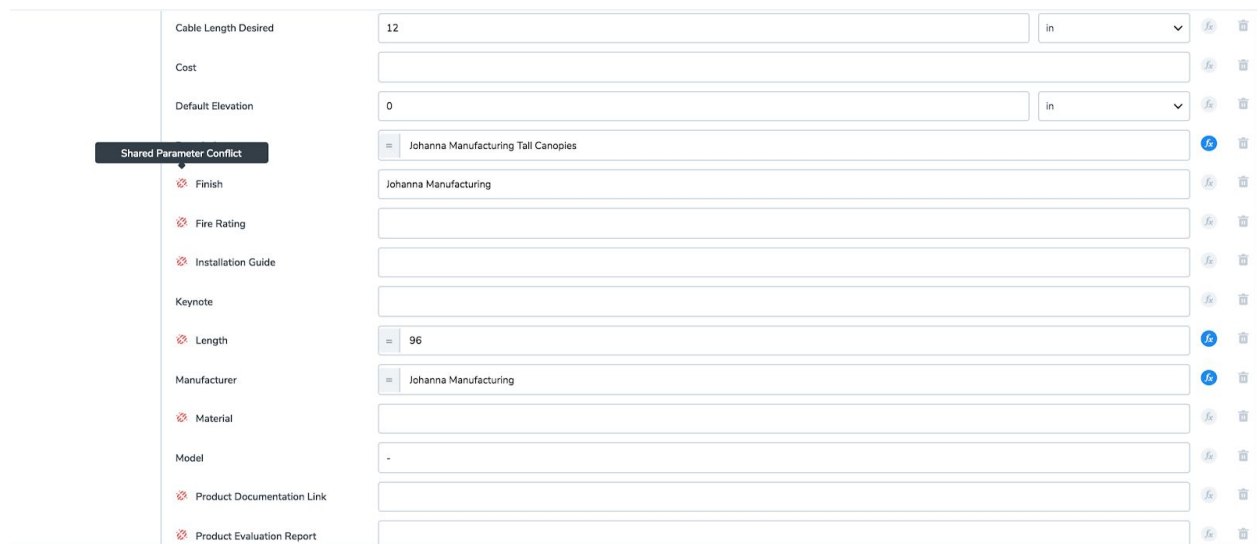
# Of Shutters		/s/
3d_3ds		/s/
product_category	Plumbing Fixtures	/s/
dwg_plan_view		/s/
dwg_front_view		/s/
bullet9		/s/
revit_file_url		/s/
3d_revit	http://resources.kohler.com/plumbing/mira/cad/KohlerMira_ShwrHds_RadaVR105.rfa	/s/
bullet10		/s/
dxl_side_view		/s/
3d_dxf_symbol		/s/
regions	Europe	/s/
bullet1		/s/
2d_dxf.zip		/s/
bullet11		/s/

- Click the update file with data button to write the attribute to the actual revit file.



V. Attributes that are missing their Shared Parameter File

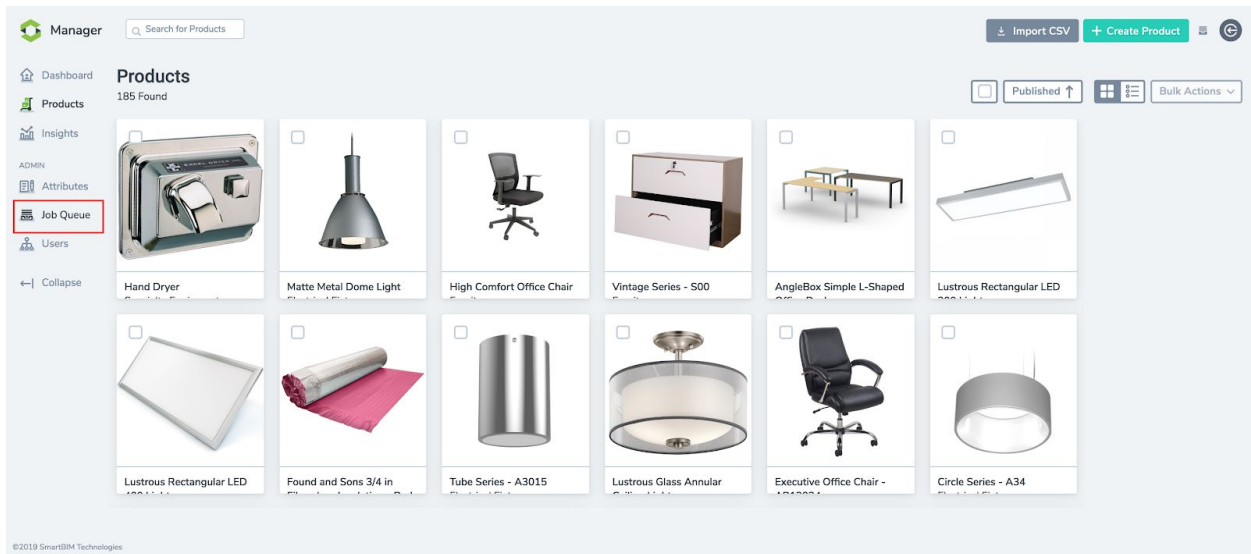
- If an attribute is missing a shared parameter file, you will see a broken chain icon next to that attribute as pictured below.



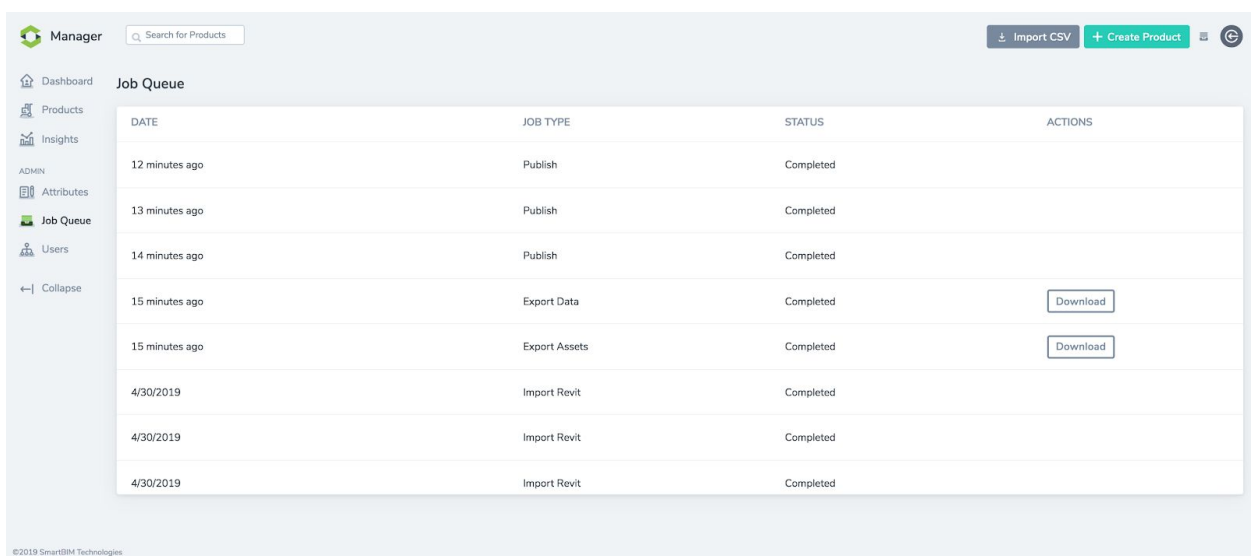
- To remedy this, find the appropriate shared parameter file and upload it to the shared parameter dropzone.

Job Queue

- The job queue is where you can see recent jobs (downloads, revit files importing, publishing attempts) and what their status is.
- To access the Job Queue page, click the Job Queue button in the sidebar.



- The only interactions you can have on the job queue page is being able to cancel an in progress job, or downloading a completed job (if it was a download action such as downloading product attachments or exporting product/revit data).



- To cancel a job, click the cancel button under the actions header (only applicable if a job is in progress).
- To download a job (if applicable) click the download button under the actions header.

Users Page

- The users section will display all users who can currently access your Design Manager and what their roles are.
- To access the users section, click the users button in the sidebar.

Manager Search for Products

Import CSV Create Product

Dashboard Products Insights ADMIN Attributes Job Queue **Users** Collapse

Products
185 Found

Sort Bulk Actions

PRODUCT NAME	CATEGORY	PUBLISHED	STATUS	LAST UPDATE	ACTIONS
1900	Plumbing Fixtures	Unpublished	Available	4/25/2019	
6D3D64AF	Plumbing Fixtures	Unpublished	Available	4/17/2019	
7260b_7270b (2)	Plumbing Fixtures	Unpublished	Available	4/17/2019	
90-Degree-Elbow_Pressure_Pipe_Fittings_PVC-8300	Pipe Fittings	Unpublished	Available	4/17/2019	
ActiClean Right Height Elongated Complete Toilet	Plumbing Fixtures	3/14/2019	Available	4/17/2019	
Anchorage-HunterDouglas-Natura Walls	Specialty Equipment	Unpublished	Available	4/17/2019	
AngleBox Class L-Shaped Office Desk	Furniture	12/18/2018	Available	4/17/2019	
AngleBox Glide L-Shaped Office Desk	Furniture	1/3/2019	Available	4/17/2019	

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Manager Search for Products, Collections & more ... Add Products J

Dashboard Products Collections Insights **Admin** Collapse

User Accounts
4 Total

USER	ROLE	STATUS	OPTIONS
josef.bell@smartbim.com	Admin	Pending Confirmation	
mark.vanderboom@smartbim.com	Full Manager	-	
graham.waldrop@smartbim.com	Insights Only	-	Revoke
bear.shuford@smartbim.com	Full Manager	-	

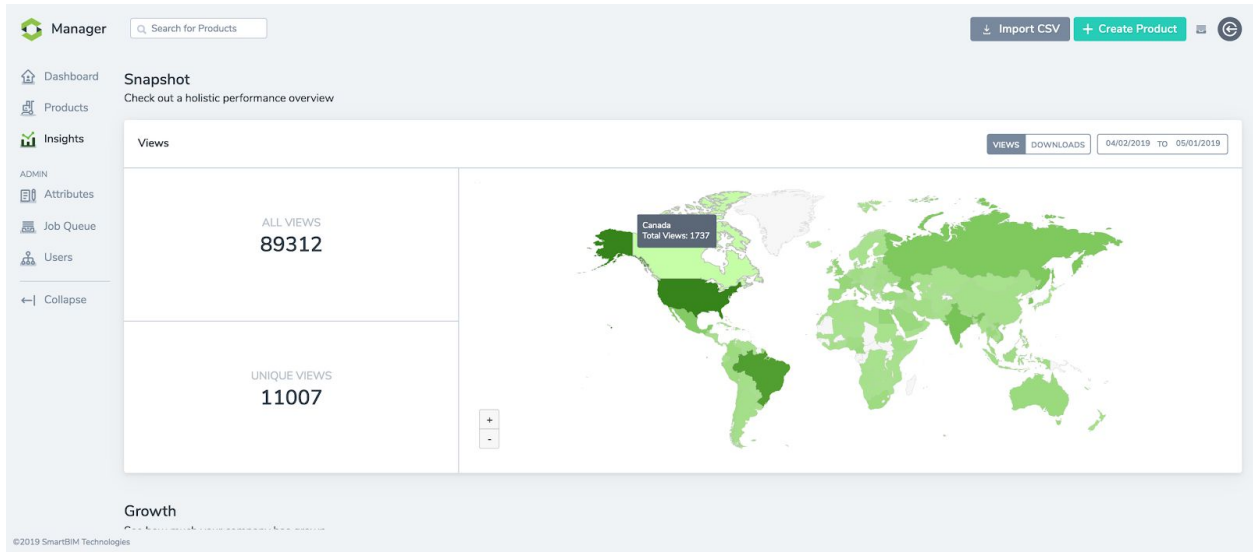
- Any additional users that need to be added should be reported to your SmartBIM sales rep or account Manager as there is no way for any user to add a prospective user currently.

Insights Page

- The Insights page is an extension of the Dashboard in many respects as much of the data that is presented on the Dashboard is presented here as well with very similar functionality. However, there is added value in the new pieces that are presented here in how AEC users are interacting with your products.

I. Snapshot

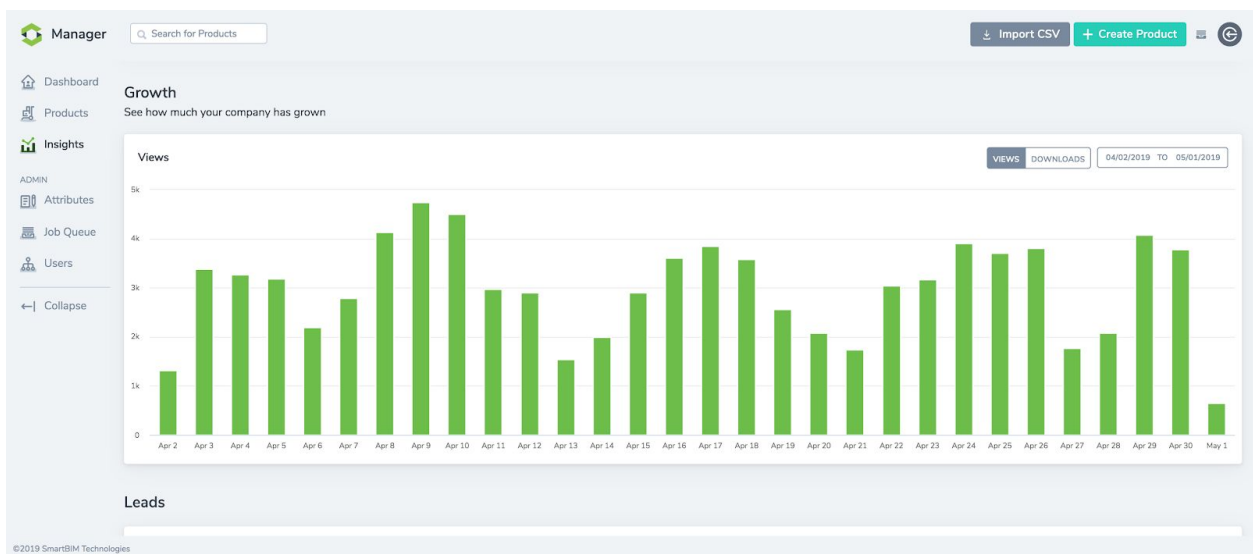
- The Snapshot section covers the location based on the country users are accessing your products from with a heat map of activity based on AEC user location.
- By default, you will see your total views over the last 30 days on the left side of the Design Manager. If you select downloads, you will see the total number of downloads on the left side of the Design Manager.
- Like the Dashboard, use your Date Picker to set the timeline to the appropriate amount of time that you want to see data populated from.
- Hovering your mouse over specific countries will enable a tool tip that displays the total number of views or downloads over the course of time you've selected from the date picker.



- In the example, we are hovering over Canada and can see the total amount of views over the last 30 days from AEC users in Canada for our products.

II. Growth

- Growth is a bar graph designed to show you the total views or downloads you have received over a specific date range to see how much interaction the AEC community is having with your products.



- As with the Snapshot section, you can alternate between views and downloads and utilize the date picker to specify an exact date range to track your company's growth over a period of time.
- By default, you will see all of your views over the last 30 days.

III. Leads

The Leads page shows the AEC users who have accessed your products from the Design Studio and includes the following information about each of them:

- Name
- Occupation
- Company
- Location
- Event Count (the total actions the user has performed when perusing/downloading your products)
- Last Event (the last time the user accessed your Design Studio and performed an event)

NAME	OCCUPATION	COMPANY	LOCATION	EVENT COUNT *	LAST EVENT
TCHAKOUADE MADYSON	Architect	TFM	Yaoundé, Centre Cameroon	1896	5/1/2019
thura kyawlin	Designer	irrawaddy	Nonthaburi, Nonthaburi Thailand	1516	4/24/2019
의영 박	Project Manager	Free	Seoul, Seoul Republic of Korea	1496	4/30/2019
Hyunwoo Kim	Student	school	Seoul Republic of Korea	862	4/28/2019
quoc vinh nguyen	Student	kien truc	Vietnam	535	4/18/2019
isyaku bala	Architect	haja consults turnkey project LTD	Nigeria	476	4/9/2019
wondimagegn gebre	Electrical Engineer	ecpmi	SNNPR Ethiopia	452	4/29/2019
amy elizabeth	Student	none	Teoloyucan, México Mexico	416	4/25/2019
Wisdom Chishimba	Architect	Udala Architects	Cape Town, Western Cape South Africa	408	4/17/2019
tsneem amarat	Student	al-balqa' applied university	Amman, Amman Hashemite Kingdom of Jordan	385	4/9/2019

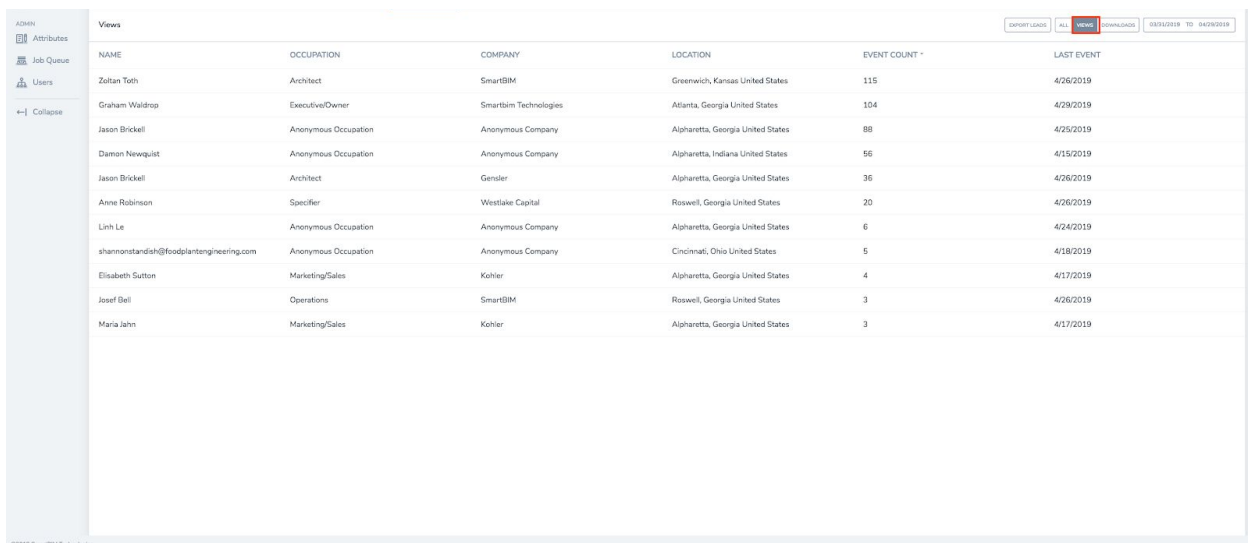
- The leads section also contains the date picker which works exactly the same way as it does in the other sections. It will filter leads by the timeline you specify.

Sorting

- The leads list is first ordered by the users who have accrued the most events on your Design Studio over the last 30 days in descending order.
 - You can sort by clicking on any of the following headers.
 - Name (sorting A-Z and Z-A)
 - Occupation (Sort by A-Z and Z-A)
 - Company (Sort by A-Z and Z-A)
 - Location (Sort by A-Z and Z-A)
 - Event Count (Sort by highest event count-lowest event count and lowest event count-highest event count)
 - Last Event (Sort by most recent event- oldest event and oldest event-newest event)
-
- To sort by name for example, you would click on the header, “Name” once and all leads would be sorted by name (First name starting with A-Z). If you were to click on “Name” again, all leads would be sorted by name but the order would be from Z-A.
-
- The remaining headers follow the same interactive protocol as well (with the exception of event count, because Leads are already sorted by highest event count by default).

Filtering

You can filter between All events, views and downloads in the leads section. To change the data display from all events to views, click the “Views” button.



Views					
EXPORT LEADS ALL VIEWS DOWNLOADS 9/23/2019 TO 9/29/2019					
NAME	OCCUPATION	COMPANY	LOCATION	EVENT COUNT *	LAST EVENT
Zoltan Toth	Architect	SmartBIM	Greenwich, Kansas United States	115	4/26/2019
Graham Waldrop	Executive/Owner	SmartBIM Technologies	Atlanta, Georgia United States	104	4/29/2019
Jason Brickell	Anonymous Occupation	Anonymous Company	Alpharetta, Georgia United States	88	4/25/2019
Damon Newquist	Anonymous Occupation	Anonymous Company	Alpharetta, Indiana United States	56	4/15/2019
Jason Brickell	Architect	Gender	Alpharetta, Georgia United States	36	4/26/2019
Anne Robinson	Specifier	Westlake Capital	Roswell, Georgia United States	20	4/26/2019
Link Le	Anonymous Occupation	Anonymous Company	Alpharetta, Georgia United States	6	4/24/2019
shannonstandish@foodplantengineering.com	Anonymous Occupation	Anonymous Company	Cincinnati, Ohio United States	5	4/18/2019
Elisabeth Sutton	Marketing/Sales	Kohler	Alpharetta, Georgia United States	4	4/17/2019
Josef Bell	Operations	SmartBIM	Roswell, Georgia United States	3	4/26/2019
Maria Jahn	Marketing/Sales	Kohler	Alpharetta, Georgia United States	3	4/17/2019

- Leads will now be filtered by most views in descending order.
- To change the data display to downloads, click the “Downloads” button.
- Leads will not be filtered by most downloads in descending order.

ADMIN

Attributes

Job Queue

Users

+/- Collapse

Downloads

EXPORT LEADS

ALL VIEWS

Downloads

04/20/2019 TO 04/20/2019

NAME	OCCUPATION	COMPANY	LOCATION	EVENT COUNT	LAST EVENT
Graham Waldrop	Executive/Owner	Smartbin Technologies	Atlanta, Georgia United States	47	4/12/2019
TEHAKOJADE MADYSON	Architect	TFM	Yaoundé, Centre Cameroon	17	4/29/2019
Zoltan Toth	Architect	SmartBIM	Greenwich, Kansas United States	9	4/26/2019
Iyiyaku Bala	Architect	haja consults lumkey project LTD	Nigeria	7	4/4/2019
thura kyawelwin	Designer	inawaddy	Northaburi, Northaburi Thailand	7	4/24/2019
gal moretzky	Designer	kolker kolker epstein	Jerusalem, West Bank Israel	5	4/7/2019
Chaire Lesko	Student	Lesko Design	Fresno, California United States	4	4/25/2019
Linh Le	Anonymous Occupation	Anonymous Company	Alpharetta, Georgia United States	4	4/24/2019
ic bog	Architect	ek	Petrópolis, Rio de Janeiro Brazil	4	4/15/2019
Yulong Jiao	Student	University of Nottingham	Ningbo, Zhejiang China	3	3/31/2019
ROBERTO HIDALGO ALVAREZ	Architect	HIAR74121593	Toluca, Estado de Mexico Mexico	3	4/16/2019
Jason Brickell	Architect	Gensler	Alpharetta, Georgia United States	3	4/26/2019
shannonstandish@foodplantengineering.com	Anonymous Occupation	Anonymous Company	Cincinnati, Ohio United States	3	4/19/2019
alexei tlistrum	Architect	none	Kingston, St. Andrew Jamaica	3	4/7/2019
oscar sepulveda	Student	chile	Santiago, Santiago Metropolitan Chile	3	4/15/2019
Manoj jadhav	Architect	vConstruct	Pune, Maharashtra India	2	4/29/2019
Mark Verna	Architect	Woodblock Architecture	Vancouver, Washington United States	2	4/17/2019
Jason Brickell	Anonymous Occupation	Anonymous Company	Alpharetta, Georgia United States	2	4/25/2019
Rafaela Rezende	Anonymous Occupation	Anonymous Company	Celila, Sao Paulo Brazil	2	4/23/2019

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Exporting Leads

- To export your leads data to a .CSV file, click the export leads button. Selecting this button will take into account how you have filtered the timeline from the date picker, whether you have views, downloads or all events selected as well. Whatever you have selected, is what will be exported to the CSV.

Products

Insights

ADMIN

Attributes

Job Queue

Users

Collapse

44

UNIQUE VIEWS

477

ALL VIEWS

175

DOWNLOADS

51

LEADS

EXPORT LEADS

ALL

VIEWS

DOWNLOADS

03/31/2019

TO

04/30/2019

NAME	OCCUPATION	COMPANY	LOCATION	EVENT COUNT	LAST EVENT
Graham Waldrop	Executive/Owner	Smartbim Technologies	Atlanta, Georgia United States	47	4/12/2019
TCHAKOUADE MADYSON	Architect	TFM	Yaoundé, Centre Cameroon	17	4/29/2019
Zoltan Toth	Architect	SmartBIM	Greenwich, Kansas United States	9	4/26/2019
Isyaku bala	Architect	haja consults turnkey project LTD	Nigeria	7	4/4/2019
thura kyawwin	Designer	Irresistably	Northaburi, Northaburi Thailand	7	4/4/2019
gal moretzky	Designer	kolker kolker epstein	Jerusalem, West Bank Israel	5	4/7/2019
Chaire Lesko	Student	Lesko Design	Fresno, California United States	4	4/25/2019
Linh Le	Anonymous Occupation	Anonymous Company	Alpharetta, Georgia United States	4	4/24/2019
ic fog	Architect	ek	Petrópolis, Rio de Janeiro Brazil	4	4/15/2019
Yulong Jiao	Student	University of Nottingham	Ningbo, Zhejiang China	3	3/31/2019
ROBERTO HIDALGO ALVAREZ	Architect	HIAR741215913	Toluca, Estado de Mexico Mexico	3	4/16/2019
Jason Brickell	Architect	Gensler	Alpharetta, Georgia United States	3	4/26/2019
shannonstandish@foodplantengineering.com	Anonymous Occupation	Anonymous Company	Cincinnati, Ohio United States	3	4/18/2019
alexei titlstrum	Architect	none	Kingston, St. Andrew Jamaica	3	4/7/2019
oscar sepulveda	Student	chile	Santiago, Santiago Metropolitan Chile	3	4/15/2019
Manoj jadhav	Architect	vConstruct	Pune, Maharashtra India	2	4/29/2019
Mark Verna	Architect	Woodblock Architecture	Vancouver, Washington United States	2	4/17/2019
Jason Brickell	Anonymous Occupation	Anonymous Company	Alpharetta, Georgia United States	2	4/25/2019
Rafaela Resende	Anonymous Occupation	Anonymous Company	Cotia, Sao Paulo Brazil	2	4/23/2019

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The leads export will be arranged by the following sections:

- You may click on any of the names in the leads section to access their Leads Profile Page (discussed on insert page number here).

LEADS CSV

The leads CSV has the following headers:

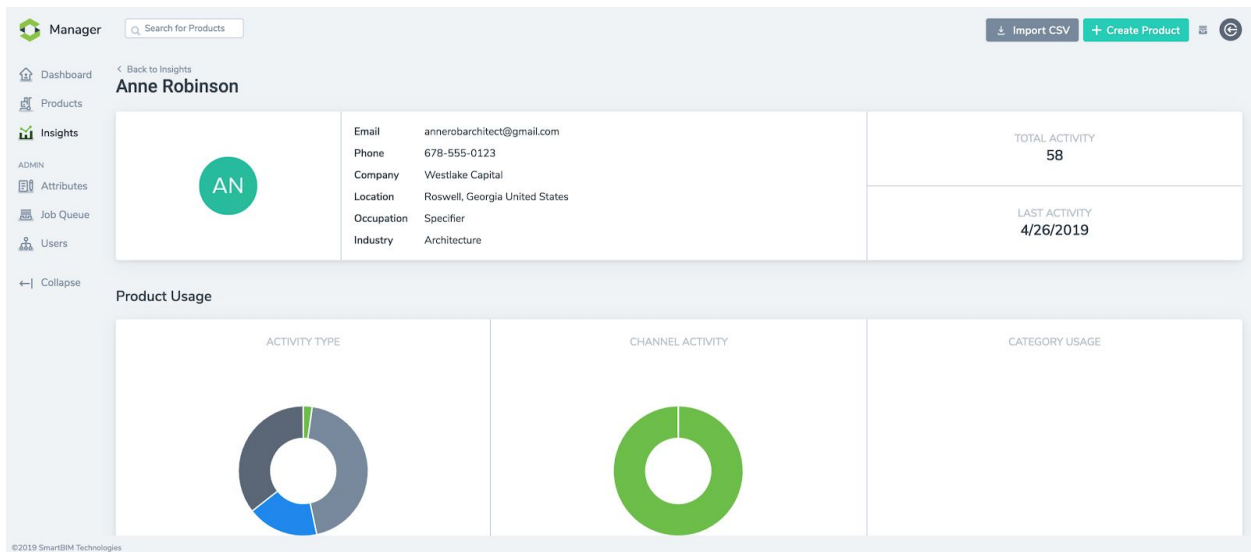
- Visitor ID
 - A unique ID SmartBIM uses to track users during a session (when they're using the Design Studio without any inactivity for 10 minutes)
- User ID
 - A unique ID that is attached to a singular user in order to track their actions.
- First Name
 - The user's first name they entered when registering on the Design Studio
- Last Name
 - The user's last name they entered when registering on the Design Studio.
- Email
 - The user's email they entered when registering on the Design Studio.

- Phone
 - a. The user's phone number they entered when registering on the Design Studio.
 - b. Note: This is an optional data point, so this field may be blank.
- Occupation
 - a. The user's occupation they entered when registering on the Design Studio.
- Company
 - a. The user's company they entered when registering on the Design Studio.
- Industry
 - a. The user's industry they entered when registering on the Design Studio.
- City
 - a. The user's city.
- State
 - a. The user's state.
- Country
 - a. The user's country.
- Site Accessed From
 - a. Did they access your products from the Design Studio, or the Aggregate Library (our legacy product)? This will be stated here.
- Time
 - a. The time in which the user committed the action in question (all actions are displayed in the UTC time zone.)
- Date
 - a. The date in which the user committed the action in questions (formatted in mm/dd/yyyy)
- Action
 - a. The action that the user took that was recorded in our system.
 - b. Referral- Which site was the user coming from?
 - i. E.g. registration page
 - ii. Google

- iii. A different product's page
- c. Download- If the user downloaded a file, the word "download" will be displayed here.
- d. Search- If the user committed a search action, the word "search" will be displayed. Searching for a product, filtering and accessing a page can constitute searching. If any of these actions are committed, the word "search" will appear to correspond with the user's actions.
- e. Page view- If the user accesses any page on the Design Studio, this constitutes a page view.
- f. Product- If the user clicks on the product details page of any product on your design studio, the word "product" will appear to correspond with that action.
- Referral URL
 - a. The page the user was on if the action was a Referral. If any other action was committed, this section will be blank.
- Page URL
 - a. The URL of the page in which the action was committed by the user.
- Search Query
 - a. If the user searched entering data into the search bar on the Design Studio, the actual query will appear in this cell. For all other actions this cell will be blank.
- Product Name
 - a. The product name interacted with. If the user is querying anything in the search bar, this cell will be blank.
- Asset Name
 - a. The name of the asset (file attachment or external link) that was downloaded. All other actions will render this cell blank.
- Asset URL
 - a. The place where the asset (file attachment or external link) is stored on our system

Leads Profile Page

- Every user has a leads profile page that displays the core information about the user and their actions that drills deeper down into their tendencies as users.
- This is broken into three sections:
- User Information
 - a. Name
 - b. Email address
 - c. Phone number
 - d. Company
 - e. Location
 - f. Occupation
 - g. Industry
- Product Usage
 - a. Activity Type- Shows a percentage breakdown of user actions in a donut chart.
 - b. Channel Activity- Shows which site or method the user is accessing your products from or with.
 - c. Category usage- Shows the percentage of products the user interacted from the Design studio by category.



- Activity Log (Coming Soon!)- A complete list of actions that a user has taken in relation to all of your products as defined by downloads and product views that shows the exact product that was interacted with, if it was viewed or downloaded and on what date the action took place.

- a. If a user clicks on the name of the product that was interacted, they will be taken to that product's product details page.

Top Products

- The top products page section rounds out the Insights page. Here you can see the top 10 products in your Manager based off views and downloads and the time period you select from the date picker.
- By default, you will see your top products based on views over the last 30 days.

RANK	NAME	CATEGORY	COUNT
1	EpicVue Windows	Windows	17
2	Door NanaWall SL 45	Doors	16
3	Door-Traffic-Chase-Durulite_Retailer-Single	Doors	14
4	AngleBox Glide L-Shaped Office Desk	Furniture	13
5	Classic Series- 12 Panel Ceiling	Ceilings	12
6	Black Arc Light Office Chair	Furniture	11
7	SPW - Triple Glaze Clad ASPEN Casement Operable	Windows	11
8	Building Enclosure CMU BIM Object	Walls	10
9	JELD-WEN 3-Panel OOX Builders Vinyl Door	Doors	10
10	Pella Architect Series Sliding Patio Door Fixed Vent	Doors	9

You can sort this list by the following headers:

- Rank- The rank of the product, the higher the rank, the more its been interacted with. (Sorted by default from 1-10. Clicking this header will sort 10-1.)
- Name- Name of the product (Clicking this will sort the list by name from A-Z. Clicking again will sort from Z-A)
- Category- (Clicking this will sort the list by category from A-Z. Clicking again will sort from Z-A)
- Count- Based on the total number of views or downloads that have been initiated with the product (clicking this will sort the list by count from highest to lowest. Clicking again will sort from lowest to highest).
- Clicking on the Product itself will take you to that product's product details page.

Individual Product Analytics

- Now that you have familiarized yourself with the Insights Page, we also have individual product analytics for every product individually that can be accessed by scrolling all the way down to the bottom of any product's product details page.
- We have a snapshot, growth and leads section that are identical to the holistic company analytics from the Insights page in terms of functionality, but shrunk down for the purpose of displaying analytics about specifically the product you're viewing.

Manager

Search for Products

Import CSVCreate Product

Dashboard

Products

Insights

ADMIN

Attributes

Job Queue

Users

Collapse

SnapshotGrowthLeads

All

EXPORT LEADSALLVIEWSDOWNLOADS04/02/2019 TO 05/01/2019

NAME	OCCUPATION	COMPANY	LOCATION	EVENT COUNT *	LAST EVENT
Jack Cottrell	Architect	CHQ Architects	Rochester, Medway United Kingdom	2	4/26/2019
TCHAKOUADE MADYSON	Architect	TFM	Cameroon	2	4/25/2019
Елизавета Руднева	Anonymous Occupation	Anonymous Company	Moscow, Moscow Russia	2	4/21/2019

https://gdfstudio.sb-manager.com/dashboard/products/e885f542-ac80-4cab-95bf-73650f5c312f#

Manager

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Views

VIEWSDOWNLOADS04/02/2019 TO 05/01/2019

Date	Views
Apr 3	1
Apr 15	1
Apr 21	1
Apr 25	1
Apr 26	1

https://gdfstudio.sb-manager.com/dashboard/products/e885f542-ac80-4cab-95bf-73650f5c312f#

Manager

Search for Products

Import CSVCreate Product

Dashboard

Products

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Attributes

Job Queue

Users

Collapse

SnapshotGrowthLeads

Views

VIEWSDOWNLOADS04/02/2019 TO 05/01/2019

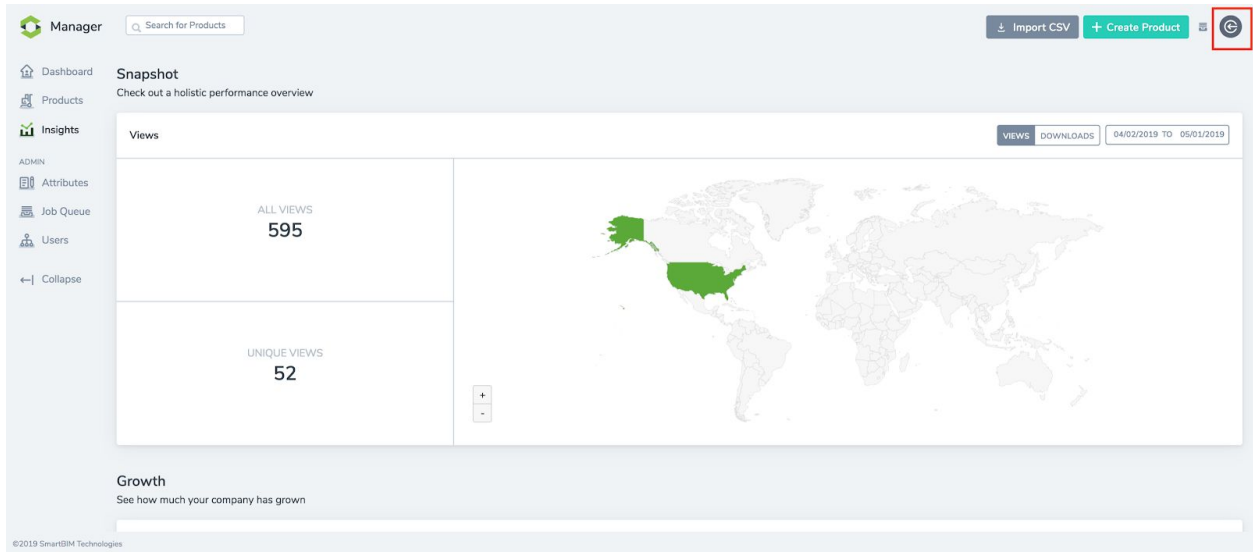
ALL VIEWS
5

UNIQUE VIEWS
5

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Log Out

- To log out of the Design Manager, click the logout button located in the top right hand corner of the Manager.



- A confirmation modal will appear. Click logout to be signed out from the Design Manager.

