

## Import from Fresco AI

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### Functionality of the import

This feature will import data created by the user in Fresco AI. The level of detail in the data imported into Software for Hardware (SFH) will depend directly on the data created in Fresco AI.

If the TOAD hardware configurator is utilized in Fresco AI, the hardware items will enter SFH as configured data. A valid SFH subscription to the price book from TOAD is required to use the configured data in SFH. Users are responsible for editing any data imported for which they do not have a subscription.

### What to do before importing

Review door and frame defaults. *Do not skip this step*

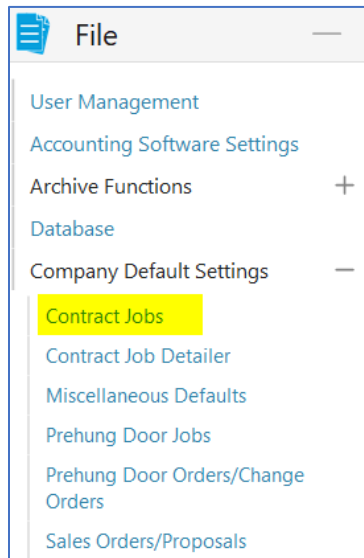
SFH will use defaults to populate missing data from the import

Data will be populated from job level Door/Frame defaults

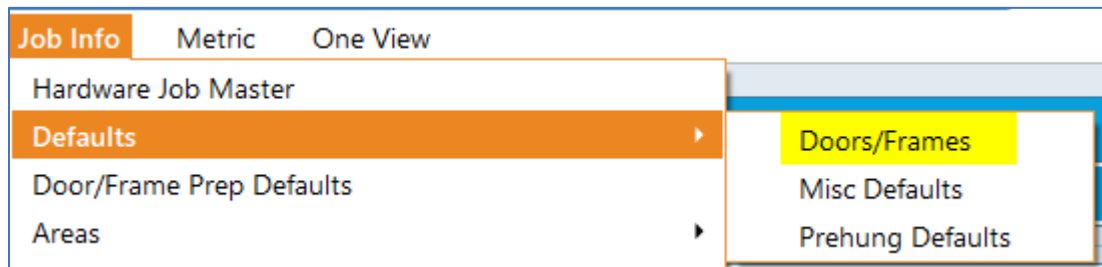
If there are no job level Door/Frame defaults, the data will be populated from the company level default settings.

If there are no default settings present fields will import blank

Company level defaults can be viewed from the File menu

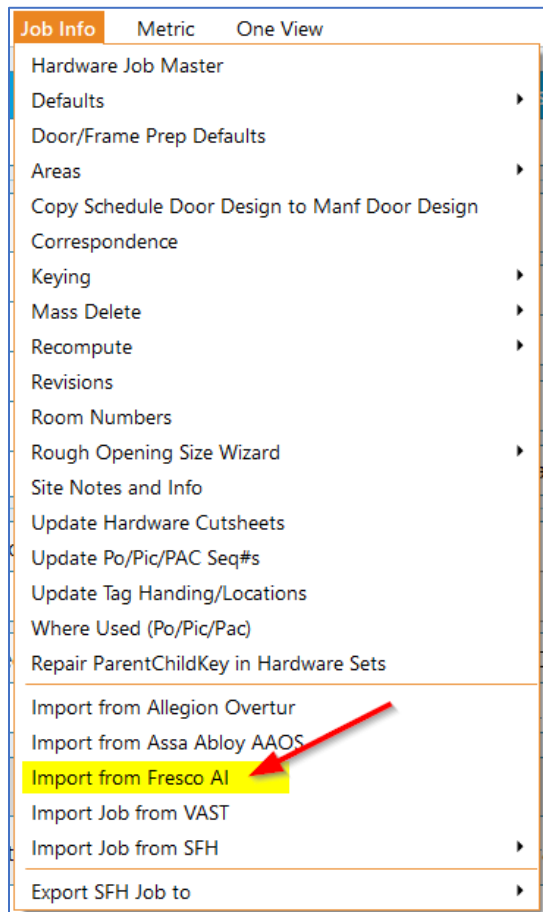


Job level defaults can be viewed from the Job Info menu



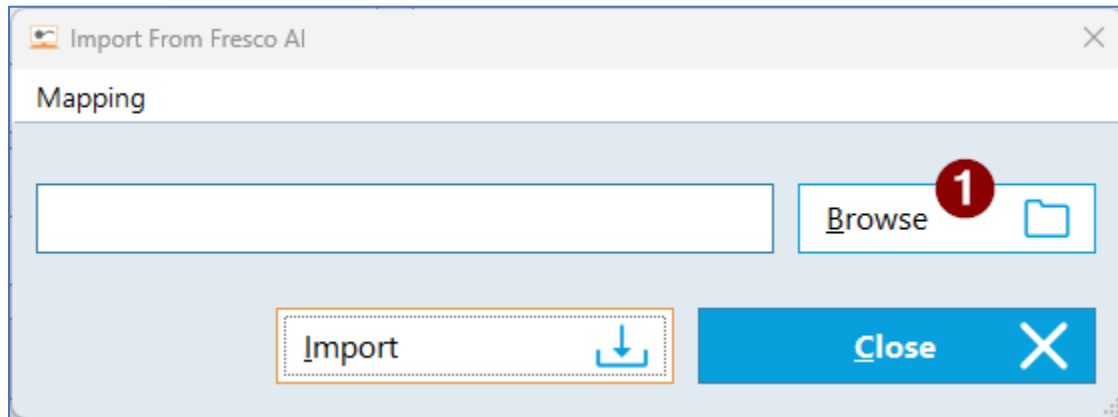
## Location of Import Option

From the main project screen select Job Info > Import from Fresco AI

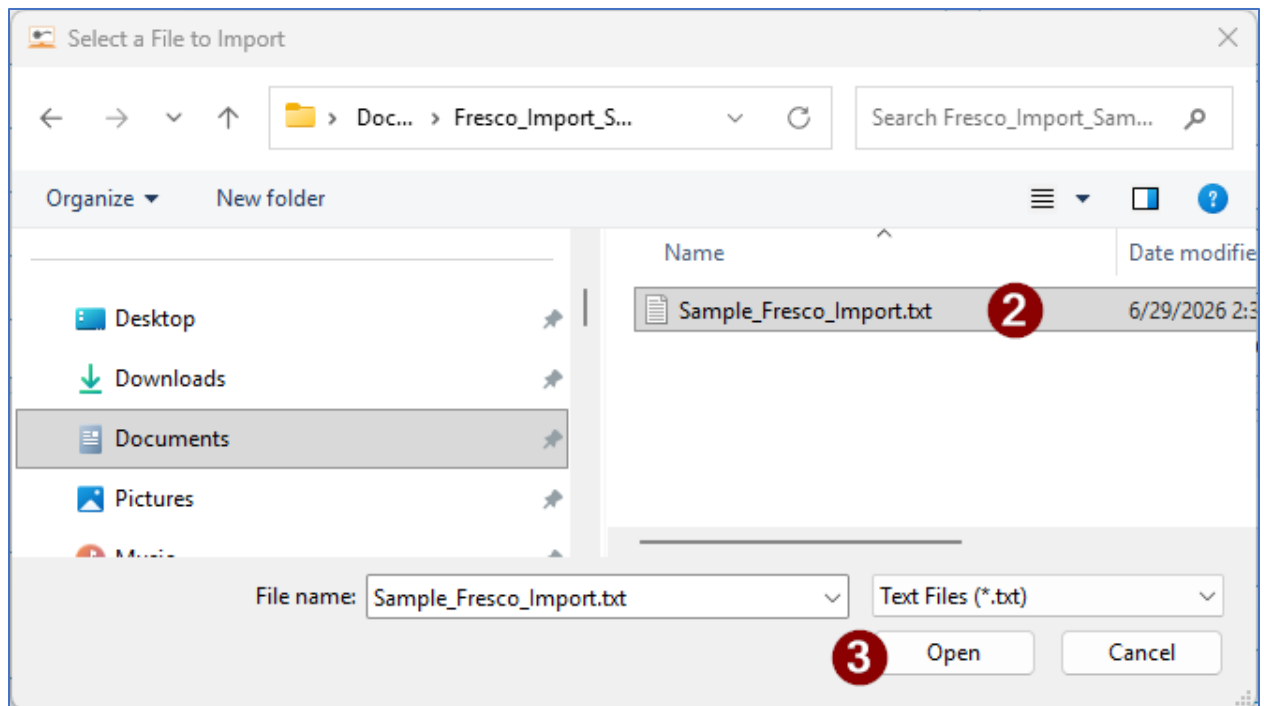


## Importing Steps

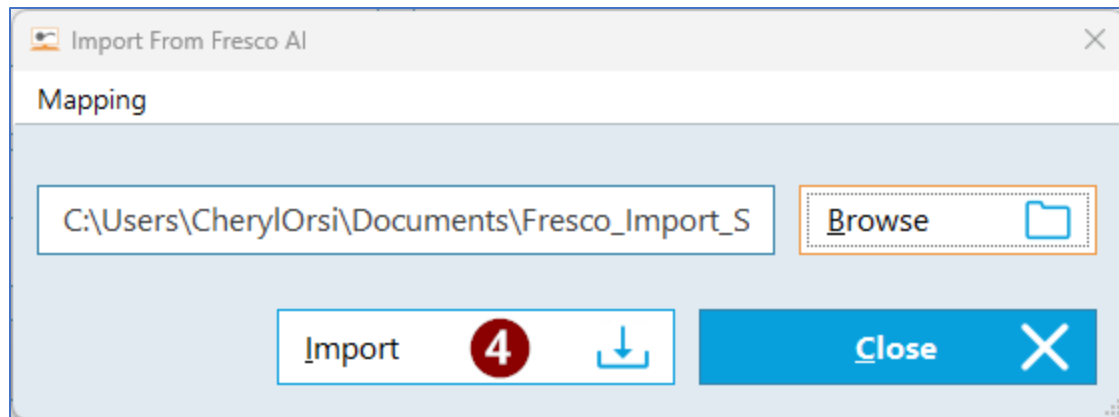
1. Click Browse



2. A File Explorer window will open. Navigate to where your file is stored and click on the file name.
3. Click Open



4. Click Import



### A. Map Missing Manufacturer Values

|     | Value    | Definition |     | SFH Value |
|-----|----------|------------|-----|-----------|
| ▶ 1 | OTHER    |            | ... |           |
| 2   | HAG      |            | ... |           |
| 3   | LCN      |            | ... |           |
| 4   | MIS      |            | ... |           |
| 5   | GLY      |            | ... |           |
| 6   | -        |            | ... |           |
| 7   | SIM      |            | ... |           |
| 8   | VON      |            | ... |           |
| 9   | NAT      |            | ... |           |
| 10  | Allsteel |            | ... |           |

1. Click the three dots to open the manufacturer list screen
2. Select the correct name in the list
3. Click Select to make your choice and close the window

Contacts - Manufacturer

|     | Abbr | Name                |
|-----|------|---------------------|
| 46  | GJ   | Glynn - Johnson     |
| ▶47 | HHC  | Hager Hinge Company |
| 48  | HB   | Haley Bros          |
| 49  | HES  | HES                 |
| 50  | HORT | Horton              |
| 51  | IVES | IVES                |
| 52  | JOHN | Johnson             |
| 53  | KABE | Kaba Eplex          |
| 54  | KAMA | Kaba MAS            |
| 55  | KAMU | Kaba Multi          |
| 56  | KASI | Kaba Simplex        |
| 57  | KOAL | Koala               |
| 58  | KWIK | Kwikset             |
| 59  | LAWR | Lawrence            |
| 60  | LCN  | LCN Closers         |

Highlight the Name

Click Select to apply

**Search:**

hag

Look In:

Search

Select

Cancel

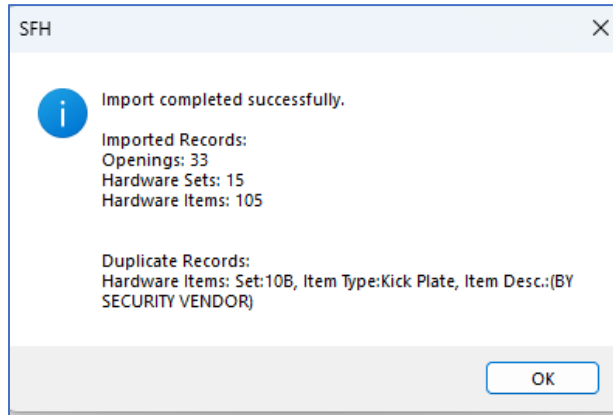


Tip: Use the Search option to find the name faster

The mapping will be saved for future imports

Repeat for all missing data

4. Click Save on the mapping window to begin the import
5. A message will display after the data is imported. *Read the message for useful information.*



## B. Review Imported Hardware Data

### Hardware Job Master

Making changes in the Job Master will apply the new data to the individual hardware sets.

|                         |             |              |               |                                           |  |                  |  |        |  |
|-------------------------|-------------|--------------|---------------|-------------------------------------------|--|------------------|--|--------|--|
| Manufacturer            |             |              |               | Item Type                                 |  |                  |  | UOM    |  |
| Our Shop                |             |              |               | Cylinder - Mortise                        |  |                  |  | EA     |  |
| Item Series/Description |             |              |               | Additional Description                    |  |                  |  | Finish |  |
| 5031BWL-26D-41          |             |              |               |                                           |  |                  |  | US26D  |  |
| Qty                     | Leaf Number | Door Prep by | Frame Prep by | <input type="checkbox"/> Handed           |  | Quick Codes (QC) |  |        |  |
| 1                       | N/A         | N/A          | N/A           | <input checked="" type="checkbox"/> Keyed |  |                  |  |        |  |

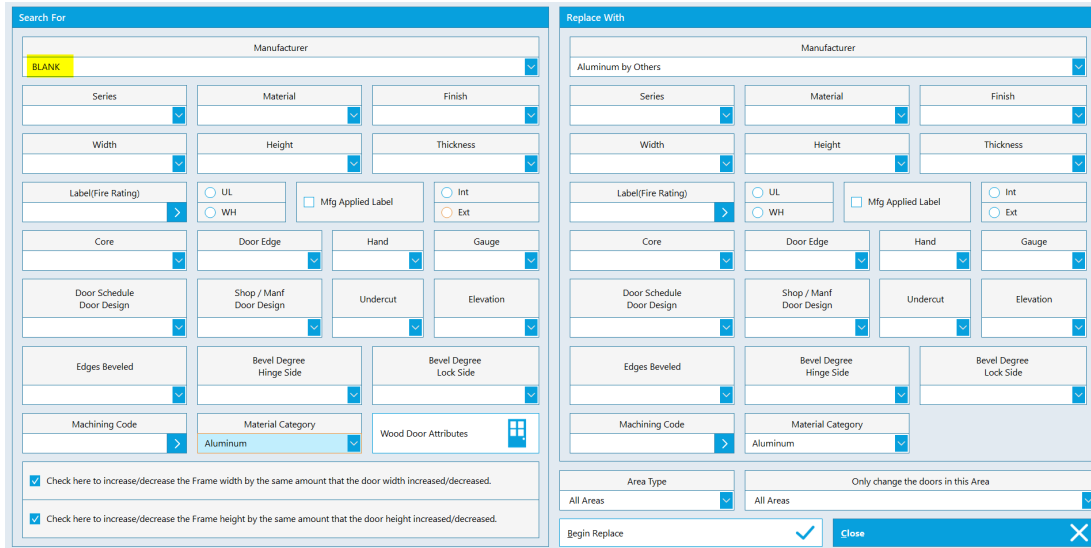
| Select                   | Qty | Item Series/Description              | Finish | Leaf Num | Door Prep By | Frame Prep By | Manf | Item Type                      | Additional Description | UOM | Handed | Keyed | XML Data     |
|--------------------------|-----|--------------------------------------|--------|----------|--------------|---------------|------|--------------------------------|------------------------|-----|--------|-------|--------------|
| <input type="checkbox"/> | 4   | BB1191 4-1/2" x 4-1/2" [NRP] x US32D | US32D  | N/A      | N/A          | N/A           | HHC  | Hinge - (4-1/2 Std Wt.(134))   |                        | EA  | N      | N     | <NewDataSet> |
| <input type="checkbox"/> | 3   | BB1279 4-1/2" x 4-1/2" [NRP] x US26D | US26D  | N/A      | N/A          | N/A           | HHC  | Hinge - (4-1/2 Std Wt.(134))   |                        | EA  | N      | N     | <NewDataSet> |
| <input type="checkbox"/> | 4   | BB1279 4-1/2" x 4-1/2" [NRP] x US26D | US26D  | N/A      | N/A          | N/A           | HHC  | Hinge - (4-1/2 Std Wt.(134))   |                        | EA  | N      | N     | <NewDataSet> |
| <input type="checkbox"/> | 3   | BB1279 4-1/2" x 4-1/2" x US26D       | US26D  | N/A      | N/A          | N/A           | HHC  | Hinge - (4-1/2 Std Wt.(134))   |                        | EA  | N      | N     | <NewDataSet> |
| <input type="checkbox"/> | 4   | BB1279 4-1/2" x 4-1/2" x US26D       | US26D  | N/A      | N/A          | N/A           | HHC  | Hinge - (4-1/2 Std Wt.(134))   |                        | EA  | N      | N     | <NewDataSet> |
| <input type="checkbox"/> | 3   | BB1168 4-1/2" x 4-1/2" [NRP] x US26D | US26D  | N/A      | N/A          | N/A           | HHC  | Hinge - (4-1/2 Hvy Wt.(180))   |                        | EA  | N      | N     | <NewDataSet> |
| <input type="checkbox"/> | 4   | BB1168 4-1/2" x 4-1/2" [NRP] x US26D | US26D  | N/A      | N/A          | N/A           | HHC  | Hinge - (4-1/2 Hvy Wt.(180))   |                        | EA  | N      | N     | <NewDataSet> |
| <input type="checkbox"/> | 3   | BB1279 4.5 X 4.5                     | 26D    | N/A      | N/A          | N/A           | HHC  | Hinge - (4-1/2 Hvy Wt.(180))   |                        | EA  | N      | N     |              |
| <input type="checkbox"/> | 4   | BB1279 4.5 X 4.5                     | 26D    | N/A      | N/A          | N/A           | HHC  | Hinge - (4-1/2 Hvy Wt.(180))   |                        | EA  | N      | N     |              |
| <input type="checkbox"/> | 1   | 5031BWL-26D-41                       | US26D  | N/A      | N/A          | N/A           | OURS | Cylinder - Mortise             |                        | EA  | N      | Y     |              |
| <input type="checkbox"/> | 1   | 80-132.626.138BRN-50-231             | 626    | N/A      | N/A          | N/A           | SCH  | Cylinder - Mortise             |                        | EA  | N      | Y     | <NewDataSet> |
| <input type="checkbox"/> | 1   | 5031B WL                             | 626    | N/A      | N/A          | N/A           | KASI | Cyl. Lockset (with thru-bolts) |                        | EA  | N      | Y     |              |
| <input type="checkbox"/> | 1   | 98EO X ALK-RSS 36"                   | 626    | N/A      | N/A          | N/A           | VDI  | Cyl. Lockset (with thru-bolts) |                        | EA  | N      | Y     |              |

- You will need to assign preps to all the items in the Hardware Job Master.
- If the hardware was configured the XML data column will be populated. These items should be reviewed. Make adjustments to leaf numbers as required.
- If the hardware was not configured AND the manufacturer was not mapped, the manufacturer will default to "OURS". These items need to be edited to have the proper manufacturer, preps, etc. assigned.
- You will have to manually configure items if you have not done so in Fresco AI. Click on each item in the grid one at a time and click the Hardware Configurator button. You may want to drag the Configurator screen to a place where you can still see the item that you chose in the Hardware Job Master screen. Once you have correctly Configured the item, click Save & Exit on the Configurator screen.



## C. Review Imported Door and Frame Data

- Search and Replace can be used to replace “BLANK” data



- Grid entry can be used to quickly review all door and frame data
- There are data fields in SFH that do not exist in the Fresco AI imported data like “Door Core”. If there are SFH defaults set those fields will populate. If there are no SFH defaults, the user is responsible for populating the data before attempting to price the Contract Quote or Job.