User Guide

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Electrika Ltd

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Welcome

Introducing Electrika Cloud

Welcome to Electrika Cloud, providing you with powerful and flexible cloud-based tools for estimating, invoicing and ordering.

You can now produce your quotes on any device and easily share quotes, orders, invoices, local data, kits and contacts with other Electrika Cloud users.

This guide will take you through the many features available.

Please contact us if you need any assistance. We welcome your feedback regarding improvements and new features.

Getting started

In this section will cover the basics of setting up a project, assigning companies and contacts, attaching project files and adding internal and external notes.

- [Starting a new quote](#)
- [General project details](#)
- [Linking companies to a project](#)
- [Adding contacts to a company](#)
- [Attaching your files](#)
- [Adding internal and external notes](#)

Starting a new quote

How do I start a new quote?

- New quotes are created in the folder that is highlighted in the left hand window
- To start a new quote, click the 'New' Quote button.
- After clicking the 'New' button you will be redirected to the Project Details page.

General project details

How do I enter general project details?

- To edit the details, click on the blank space and the edit box will appear.
  After typing the details you want, press Enter or click on ✅ to submit. To cancel, press Esc or click on ❌ .

Linking companies to a project

You can link any number of companies that are related to a project.
This can include the main client and also wholesalers for purchasing the materials, sites or any other related addresses.

How do I link a company to a project?

- To link companies to the project, you can search by either Company Name, Address, Post Code or Telephone and the system will suggest the most relevant companies that you may have added in your Contacts Manager.
- Selecting a company from this list will link it with the project.
- You can add a new company by clicking on the 'New Company' button.

Adding contacts to a company

Each company can have multiple contacts, one of which is designated the default contact.

How do I add contacts to a company?

- To add contacts to a company, click ![icon] .

Attaching your files

Sometimes it can be useful to attach some files with the project for reference. For example, an Auto Cad drawing file, Excel or PDF document.

How do I attach files to a project?

- Click on the 'Browse for files' button to browse for files you want to attach.

Adding internal and external notes

Notes could be crucial to explain certain details, either for customers or other colleagues. Customer notes are printed on the reports, whereas the internal notes are not.

- To add notes to a project, click on the the memo field for internal notes or customer notes.

Working with Sections (Items)

Most projects are divided into different sections with a subtotal for easier reading for the client.

For example, a new housing electrical rewire might consist of sections with following names – living room, kitchen, landing, bathroom, bedroom 1 and bedroom 2.

- [Dividing a project into Sections](#)
- [Opening a Section and adding parts](#)
- [Adding, copying and deleting Sections](#)
- [Renaming Sections](#)
- [Switching between different views](#)
- [Updating Section quantity and values](#)
- [Setting Sections as optional](#)
- [Reordering Sections](#)

Dividing a project into Sections

How do I divide a project into Sections?

A project is normally divided into Sections (also referred to as Items) such as Mains Distribution, Lighting, Heating, Testing etc.

This helps you to organize all the material and different aspects of the project and will also allow you to quickly apply discounts and markups at Section level.

		Item	Quantity		Mat Trade	Discount%	Mat Cost	Total Mat	Optional?
1	Active	A) SUB-MAIN & DISTRIBUTION	⊖	1 ⊕	£2,661.85	9.331	£2,413.56	£2,413.56	Priced
2	Open	B) LIGHTING AND EMERGENCY LIGHTING	⊖	1 ⊕	£2,857.30	27.827	£2,060.40	£2,060.40	Priced
3	Open	C) SMALL POWER	⊖	1 ⊕	£1,766.64	37.157	£1,112.02	£1,112.02	Priced
4	Open	D) FIRE ALARM SYSTEM	⊖	1 ⊕	£565.00	0.000	£565.00	£565.00	Priced
5	Open	E) TELEPHONE	⊖	1 ⊕	£61.43	14.062	£52.79	£52.79	Priced
6	Open	F) HEATING AND VENTILATION	⊖	1 ⊕	£799.06	37.022	£503.42	£503.42	Priced
7	Open	G) INTRUDER ALARM SYSTEM	⊖	1 ⊕	£0.00	0.000	£0.00	£0.00	Priced
						23.006		£6,707.19	

Opening a Section and adding parts

How do I open a Section to add parts?

- Click on the 'Open' link on the Section you wish to open.

- The section will be opened and become the Active section.
- You will be taken to the Active tab where you can then proceed to add parts.

Adding, copying and deleting Sections

How do I add a new Section?

- Click on the 'New' button to add a new Item to the end of the list.
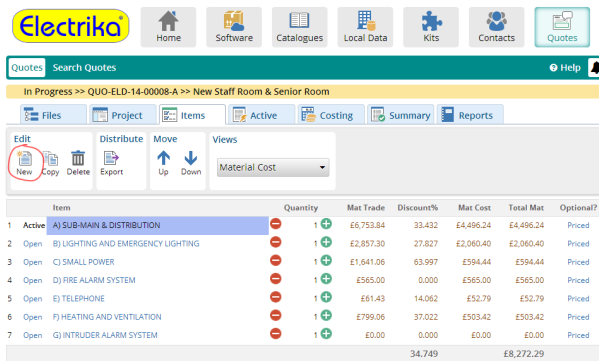
How do I copy a Section?

- Select the Section that you wish to copy by highlighting it and then click the 'Copy' button.

How do I delete a Section?

- Select a Section by highlighting it and then click the 'Delete' button.

Renaming Sections

How do I rename a Section?

- Select the Section that you wish to rename by highlighting it.
- Click on the selected Section, this will display an edit box where you can type in the new name.

- Type the Section name and click ✅ or press the 'Enter' key to save the edits. To cancel click ❌ or press the 'Esc' key.
- The system will suggest previously used Section names as you type.

Switching between different views

How do I switch views?

Views is a powerful feature that allows you to focus on one part of the pricing at a time and keeps the display clean and simple. This is particularly used for devices such as tablets that have limited screen size.

- To switch between different views click on the radio buttons in the Views panel

Updating Section quantity and values

How do I update the values of a Section such as Quantity, Markup and Overhead?

- You can increase or decrease the quantity by clicking on ➕ or ➖
- You can edit any cell by clicking on it and typing in the new value.

Setting Sections as optional

Optional Sections are excluded from the total price of the project and can be displayed separately on the reports. They can also be left out of the reports.

How do I set optional Sections?

- Click on the link in the column with the heading 'Optional?' the link will toggle between 'Priced' and 'Optional'.

Reordering Sections

How do I to rearrange or reorder Sections?

- Select the Section you wish to move and click on the 'Up' or 'Down' buttons.

Working with parts

To build a quote you can either add parts directly from our 160,000 parts database, add your own parts or import data from another source such as a manufactures trade price list.

- [Adding parts](#)
- [Deleting parts](#)
- [Using cut, copy and paste](#)
- [Using the clipboard](#)
- [Using kits](#)
- [Importing & exporting parts](#)
- [Switching between different views](#)
- [Switching to a different Item](#)
- [Reordering parts](#)
- [Updating part quantity and values](#)
- [Adding notes to a part](#)
- [Changing cat / local parts to specials](#)
- [Assigning a supplier to a part](#)
- [Using different labour types](#)
- [Copying discounts to multiple parts](#)
- [Updating prices for cat / local parts](#)
- [Locating cat / local parts](#)
- [Add your own parts to a local database](#)

Adding parts

There are many ways to add products to a quotation, this section will guide you through this process.

- [Adding your own parts](#)
- [Adding parts from e-Catalogues](#)
- [Searching for e-Catalogue parts](#)
- [Filtering e-Catalogues](#)
- [Adding parts between tools](#)
- [Searching other tools for parts](#)
- [Searching for parts by description](#)
- [Adding a blank special](#)
- [Inserting a heading](#)

Adding your own parts

How do I add my own parts?

If the Electrika e-Catalogues are not suitable for your industry, or they do not have all the parts you require, there are a number of ways to add your own parts.

In the longer term you should build your own local database.

In the short term you can add them as specials or import parts from Excel.

Adding parts from e-Catalogues

How do I to add parts to a quote, local data or kit from the catalouges?

- Select the parts that you wish to add to your quote, local data or kit from any of the catalogues.
- Click the 'Add To Local', 'Add To Kit' or 'Add To Quote' button.

- These parts can be viewed in the active Item's parts list.

Searching for e-Catalogue parts

How do I add a part to a quote, local data or kit while staying on the parts list?

- Start typing a part number in the Cat Number Search edit box.

- As you start typing the part number, the system will suggest the relevant parts. You can select any one of the parts and add it to the parts list.

Filtering e-Catalogues

You may want to restrict or filter the suggestions to certain manufacturers only.

How do I filter search suggestions to certain manufacturers only?

- Click on the ▼ button, to display a list of manufacturers and un-select the ones that you wish to exclude from the search suggestions.
- The filter only works with the catalogue parts search.

Select the manufacturers you would like to include in the search ☒

☑ Select / Unselect All

☑ ABB Contractor	☑ ABB Industrial
☑ Ackermann	☑ Appleby
☑ Crabtree	☑ Dorman Smith
☑ Eaton Commercial, Ind & Autom	☑ Eaton Residential / Consumer
☑ Eaton Low/Medium Voltage	☑ Eaton Power Management UPS
☑ Eaton Industrial Switchgear	☑ Gilflex
☑ Hager	☑ Hamilton Litestat
☑ Havells	☑ Honeywell
☑ Legrand Cable Management	☑ Legrand Power Distribution
☑ Legrand Wiring Devices	☑ Legrand Industrial & Power Protection
☑ Lewden Palazzoli	☑ Marshall-Tufflex
☑ MK Electric	☑ Protek
☑ Schneider Electric Low Voltage Dist	☑ Schneider Electric Power Products
☑ Schneider Electric LV Switchboards	☑ Schneider Electric Ind Control & Auto
☑ Schneider Electric Distribution & Control	☑ Schneider Electric Busbar Trunking
☑ Schneider Electric Cable Management	☑ Schneider Electric Enclosures
☑ Schneider Electric Wiring Devices	☑ Schneider Electric C-Bus & E-series
☑ Schneider Electric Buildings	☑ Schneider Electric Installation Materials
☑ Schneider Electric - Miscellaneous	☑ Siemens
☑ Volex Accessories	☑ Wylex

Apply

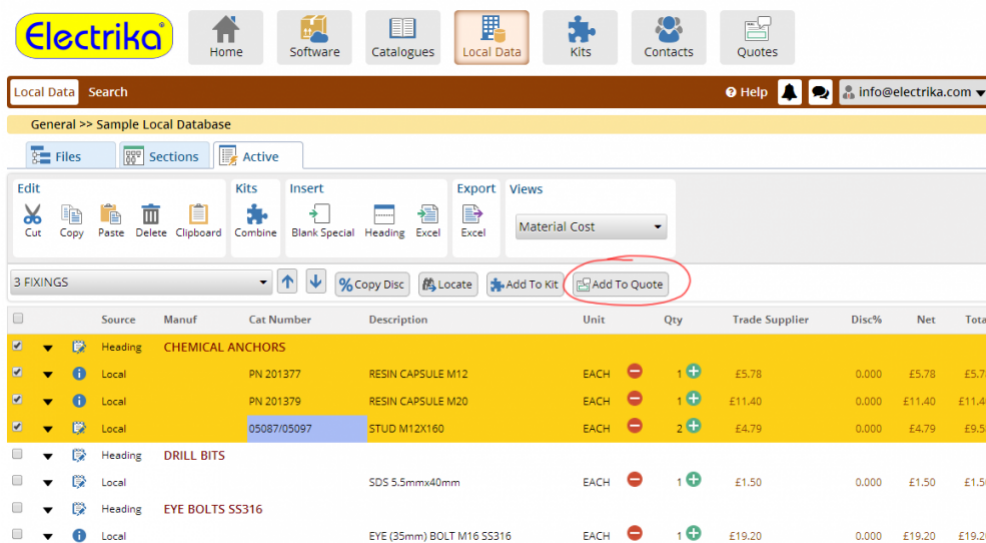# Adding parts between tools

How do I add parts between quotes, local data and kits?

Here we will assume that you want to add parts from the local data to a quote.

- Select the local data parts that you wish to add to a quote.
- Click on the 'Add to Quote' button to add the selected local data parts to the opened quote.

- These parts can then be viewed in the active Item's parts list.

Searching other tools for parts

The search bar at the bottom of the parts list is very powerful and it is worth spending some time familiarizing yourself with how it works. It not only allows you to search the Electrika e-Catalogues but also lets you search any other tool.

How do I search the quotes, local data or kits?

- Select the tool type that you wish to get the search suggestion from.

- For example if you select Local and start typing a part number in the 'Cat Number' search, you will get suggestions from the parts in your local data.

- If you type in a part number in the Cat Number search box and press 'Enter' or click 'Search', the system will search for the part in the selected tool type.
- If the part is not found in the selected tool type, it searches the e-Catalogues then kits and then quotes in that order.
- For example if the tool type selected is Local and you know a part that is in the Electrika e-Catalogues but not in the local 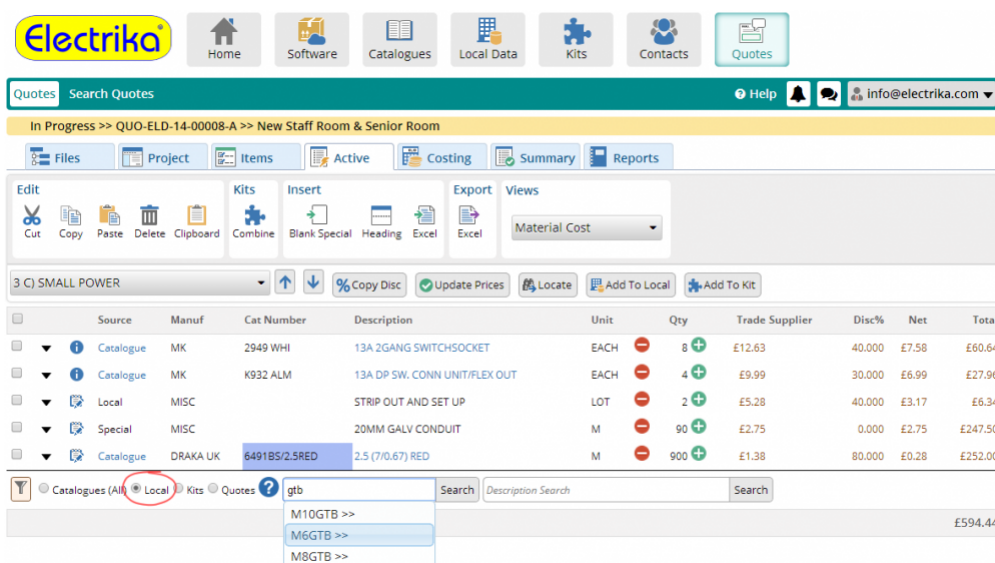data, then although it will not be suggested it will still be found in the e-Catalouges and added to your parts list when you press 'Enter' or click on the 'Search' button.
- If the part is not found in any of the tools then you will be redirected to the selected tool type's search page.

Searching for parts by description

How to add parts by description search?

- Type in the search terms in the description search edit box. This will display a dialog box with the ten most relevant search results.
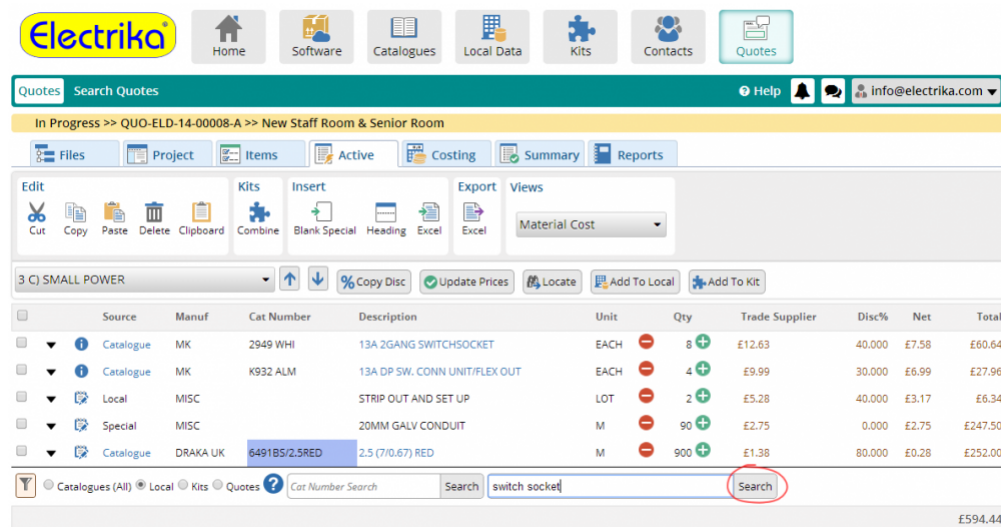- Click the ⊕ button to add a part to the parts list.

Adding a blank special

A blank special is a custom part that you can add if the part is not present in any of the Electrika e-Catalogues or your local data.

For a blank special part all the columns can be edited including the trade price.

How do I add a blank special part?

- Click on the 'Blank Special' button.

- To add a blank special that already exists in one of your files just start typing in the part number and the system will suggest the most relevant blank special parts.

Inserting a heading

It is sometimes useful to insert headings within the parts list to make the layout clearer for your client.

How do I insert a heading in the parts list?

- Move the highlight to the row where you wish to insert a heading.
- Click on the 'Heading' button and type in your heading text. The heading row spans across all the columns.

Deleting parts

How do I delete parts?

- Select the parts that you wish to delete and click on the 'Delete' button.

Using cut, copy and paste

You can copy and paste parts between all files and all tools. For example, you can copy parts from local data or kits and paste them into quotes or vice versa.

How do I cut or copy parts?
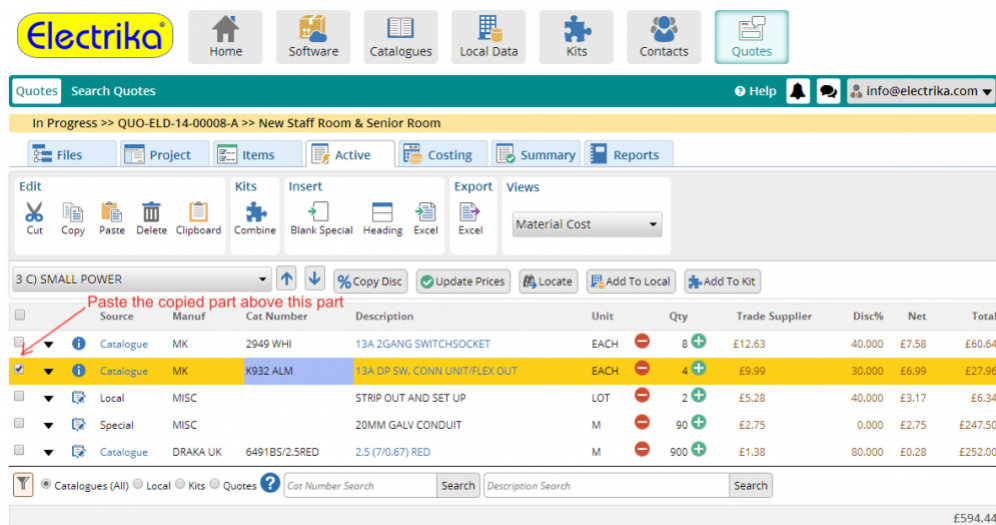
- Select parts you wish to cut or copy and click on the 'Cut' or 'Copy' button.

How do I paste parts?

- Move the highlight to the row where you wish to paste the copied parts and click on the 'Paste' button.

Using the clipboard

The clipboard is useful for checking parts that were copied or cut earlier. If you have copied a lot of parts but wish to paste only a selection of them, then this can be done using the clipboard.

How do I use the clipboard?

- Click on the 'Clipboard' button to display all the parts on the clipboard.

How do I to paste parts from the clipboard?

- Select the parts that you wish to paste into the active parts list and click on the 'Paste Selected' button.

- You can empty the clipboard or remove some of the selected parts from the clipboard by clicking on the 'Remove Selected' button.

✳ If you copy parts to the clipboard and then proceed to delete them from your parts list they will also be removed from the clipboard, although a warning will appear.

Using kits (assemblies)

Kits are a very powerful tool that allow you to combine items together to allow for quick creation and scalability to your quotations. for example – switch back box, faceplate and wiring x 5.

- Creating a Kit
- Expanding and collapsing a Kit
- Adding a Kit to the Kit library
- Breaking a Kit into parts

Creating a Kit

A Kit consists of parts that you wish to group together, and can even consist of a complete project which represents a typical installation. There is no limit to the number of Kits you can create or the number of parts you can add to a Kit. Kits can be 'collapsed' to show as a single line in your parts list with the total net price and average discount and markup.

How do I create a kit?

- Select the parts that you wish to combine into a kit.
- Click on the 'Combine' button.

- This will display a dialog where you can type in the manufacturer, cat number and description for the kit.

- This will combine all the parts in one kit.

Expanding and collapsing a Kit

How do I view the kit parts?

- Click on ▼ to view the kit menu.

- Click on the 'Expand / Collapse kit' link from the menu to expand or collapse the kit to be able to view the parts. The part marked in red below is the kit header that summurizes the kit, and the parts marked in blue are the parts contained within the Kit.

Adding a Kit to the Kit library

You may create a kit in a quote and want to reuse it for other files in the future.

How do I add or copy a kit to the kit library and active kit folder?

The kit library is way for you to organize your kits and make them available to other tools such as the local data and quotes. The kit library can also be used to share kits with other Electrika Cloud users.
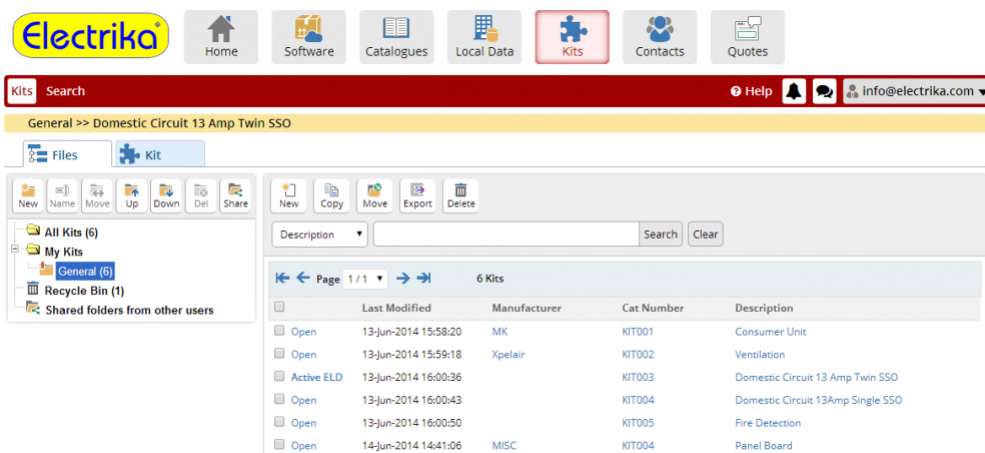
- Click on ▼ to view the kit menu and then click on the 'Copy to active kits folder' link.
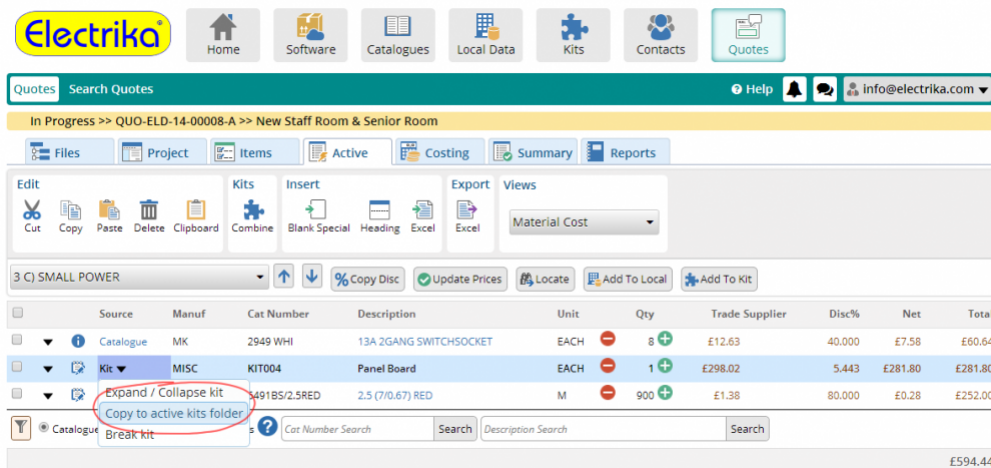
- This will add the kit to the kit library.

Breaking a Kit into parts

Breaking a kit separates the kit out into individual parts.

How do I break a kit?

- Click on ▼ to view the kit menu list and then click on 'Break Kit' link.
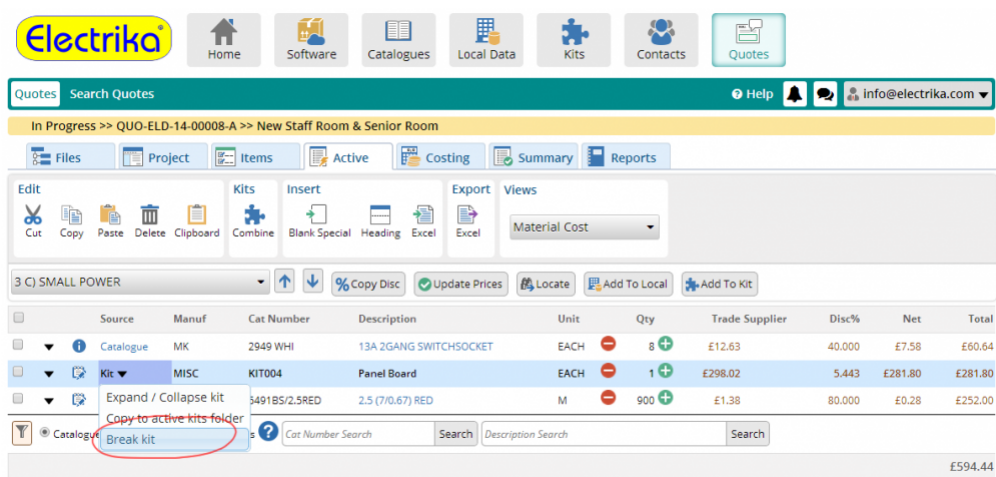
Importing & exporting parts

If you have a parts list in Excel format you can import them into the active parts list.

How do I import parts?

- Click on the 'Import Excel' button.
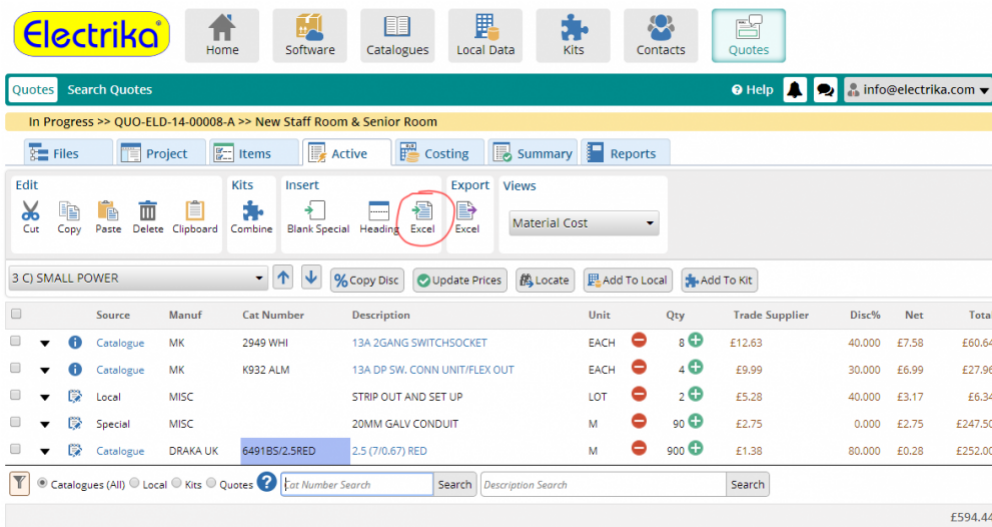
- This will display an upload dialog. Browse for the Excel file to import and click the 'Upload' button.
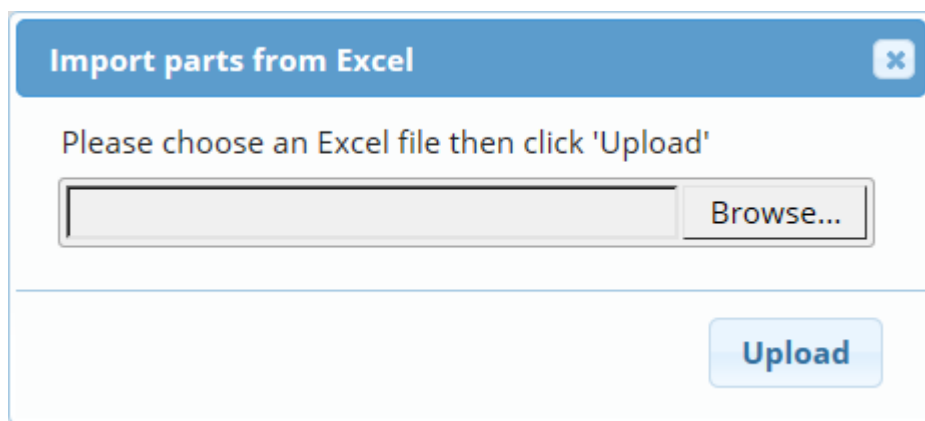
- On uploading the file a dialog with all the column names will be displayed
- Against each column there will be a drop down list with the columns from the Excel file that you uploaded earlier.
- Select a column from your file that matching the column from Electrika on the left.
- Once all the columns are chosen select whether you would like to import all the parts as a special, or search for the parts in the e-Catalogues and local data.

How do I export parts?

- Click on the 'Export Excel' button.

Switching between different views

Views is a powerful feature that allows you to focus on one part of the pricing at a time and keeps the display clean and simple. This is particularly used for devices such as tablets that have limited screen size.

How do I switch views?

- To switch between different views click on the Views drop down list.

Switching to a different Item

You may want to switch between different Items or sections while staying on the parts list page.

How do I switch to a different Item or section?

- Click on the active Item drop down to display the list of Items in the file.

How do I start a new Item or section from the parts list?

- Click on the 'Add New Item' link.

Reordering parts

How do I reorder parts or move parts up or down?

- Select the parts you wish to move
- Click on 'Up' or 'Down' button.

Updating part quantity and values

How do I update the values of a part?

- You can increase or decrease the quantity by clicking on ⊕ or ⊖
- You can edit any cell by clicking on it and typing in the new value.

Adding notes to a part

How do I add notes to a part?

- Click on 📝 icon. This will display a dialog where you can type in the note regarding the part.

- Once the note is added, the 📝 icon will change too ℹ️
- To view the note hover your mouse over the ℹ️ icon.

Changing cat / local parts to specials

If you change an e-Catalogue or local part to a special you can then change the trade price to any value.

> ✱ If you change a part to a special then its price will no longer be updated when you use the Update Prices feature.

How do I change an e-Catalogue or local part to a special?

- Click on the 'Catalogue' or 'Local' text in the 'Source' column.

- You will be prompted to confirm that you wish to change the part to a special.

- The part is now a special and you can proceed to edit the 'Cat Number', 'Description', 'Trade Price' etc.

Assigning a supplier to a part

How do I assign a supplier to a part?

- Click on a cell in the 'Supplier' column.

- This will display a list of Suppliers. These suppliers are the list of companies in the 'Suppliers' folder in your contact manager.

- To assign a supplier to your part click on ⊕

- This will assign the supplier to the part.

- If you wish to add a new supplier to the list click on the 'Add / Edit a supplier' button.

- This will redirect you to the Contacts page and will display a dialog to add a new Supplier.

How to remove a supplier from a part?

- Click on the supplier cell in the parts list that you wish to remove.
- This will display the Supplier's list dialog.
- Click on the 'Clear supplier from the part' button.

When a supplier is linked to the part it is also linked to the project. This company cannot be removed from the project until it is removed from the part.

Information

This company cannot be removed because it is linked as a Supplier on one of the parts

OK

Using different labour types

Labour comes in many forms, and Electrika gives you the ability to create as many labour types as you wish, this could be for a group of people like apprentices or even for an individual.

- [Assigning labour to a part](#)
- [Adding a new labour type](#)
- [Editing the labour type](#)
- [Deleting a labour type](#)
- [Setting a default labour type](#)
- [Setting a default labour types list](#)

Assigning labour to a part

The labour rate is used with the unit hours to work out the labour cost for every part. For example if the labour rate is £25 per hour with half an hour install time then the labour cost will be £12.50

How do I assign labour to a part?

- Move the highlight to the 'Lab Type' or 'Lab Rate/Hr' column.
- Click on the text inside the cell.

- This will display a dialogue box where you can either select or add a new labour type.
- Click on to ⊕ assign labour to the highlighted part.

Labour Types

Type in new labour type | Add New

Default means to use that labour type for all new parts added

Default	Apply	Name	Rate/Hr	Delete
◉	➕	Approved Elect.	£26.50	🗑
◯	➕	Apprentice	£4.50	🗑
◯	➕	Labourer	£5.00	🗑
◯	➕	Foreman	£10.90	🗑
◯	➕	Subcontract	£10.00	🗑
◯	➕	Commissioning	£11.00	🗑

Save as default means use this list for all new files

Save as default

Adding a new labour type

How do I add a new labour type?

- Type in the labour type label in the edit box and click 'Add New'.

Editing the labour type

How do I edit the labour type?

- Click on the labour type 'Name' or 'Rate/Hr' you wish to edit.

- This will display a dialog to edit labour type 'Name' or 'Rate/Hr'.

Labour Types

Type in new labour type | Add New

Default means to use that labour type for all new parts added

Default	Apply	Name	Rate/Hr	Delete

Edit labour type label

Commissioning

Apply

26.50
£4.50
£5.00
10.90
10.00

Commissioning £11.00

Save as default means use this list for all new files

Save as default

Labour Types

Type in new labour type | Add New

Default means to use that labour type for all new parts added

Default	Apply	Name	Rate/Hr	Delete

Edit labour Rate Per Hr

£11.00

Apply

26.50
£4.50
£5.00
10.90
10.00

Commissioning £11.00

Save as default means use this list for all new files

Save as default

Deleting a labour type

How do I remove a labour type?

- Click on 🗑 to delete a labour type.

Setting a default labour type

The default labour type is used whenever a part is added from the Electrika e-Catalouges.

How do I set default labour type?

- Click on the radio button on the labour type row.

Setting a default labour types list

The default labour types list is used whenever a new file is created. Any changes made to the labour types list stays with that file, so the labour rates can be set separately for each project.
How do I set a default labour types list?

Click on the 'Save as default' button.

Copying discounts to multiple parts

- Highlight a part whose supplier or discount you wish to copy.
- Click on the 'Copy Disc' button.

- Now select if you wish to copy supplier text and/or the discount%.
- Select if you wish to copy the supplier or discount to any number of parts, to all the parts in the list or to all the parts in the file and click 'Copy'.

Updating prices for cat / local parts

How do I update e-Catalogue or local data trade prices?

- Click on the 'Update Prices' button.
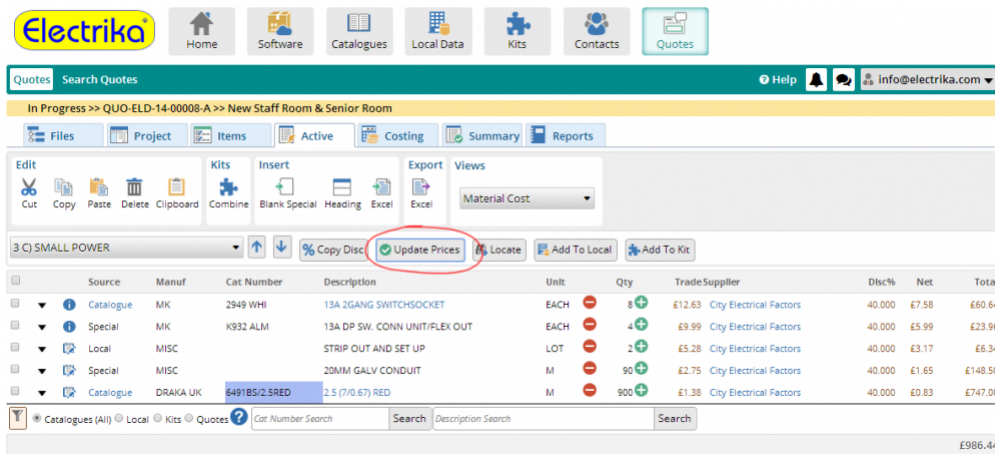
- This will display a dialog with two options whether to update e-Catalogue parts, local data parts or both.
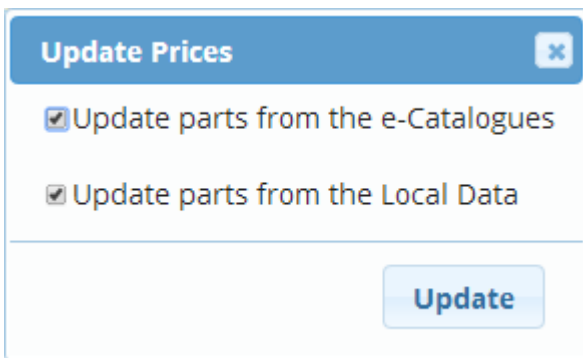
- Click on the 'Update' button and all the e-Catalogue or local data parts in your parts list with price changes will be updated.

Locating cat / local parts

Locating parts can be useful if you wish to see where the part is located within the e-Catalogues or local data.

How do I locate a part from the quote?

- Select an e-Catalogue or local data part that you wish to locate.
- Click on the 'Locate' button.

- You will be taken to the part in the e-Catalogue or local data and it will be highlighted in yellow.

Your local database

Although the Electrika product catalogue is fairly comprehensive, you may many reasons want to build your own product database. You can do this in Electrika by creating a local database and either adding parts manually or by importing from excel.

- How to create a local database
- Import from excel into a local database

How to create a local database

How do I create a local database?

- Select the "Local Data" button on the top bar and then use the folder navigation on the left to break your database of products into smaller chunks e.g Lighting > Emergency Lighting
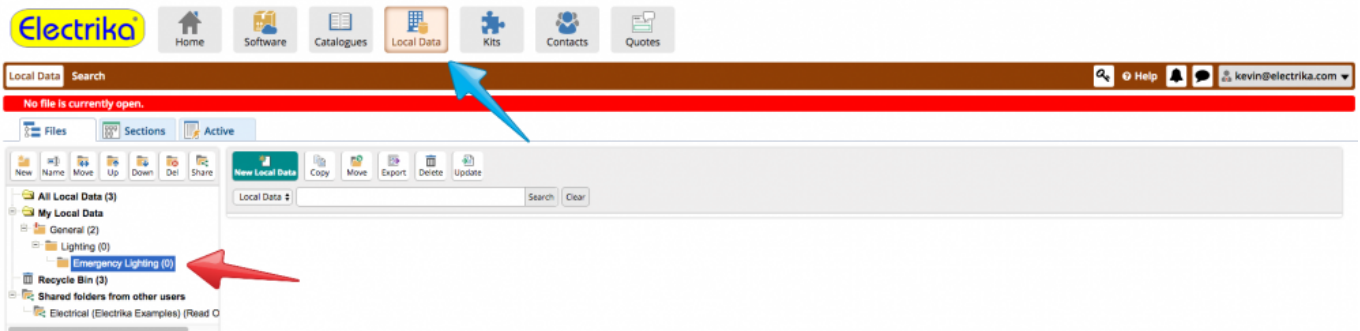
- With the preferred folder selected click the "New Local Data" button and then give it a name, e.g., "Manufacturer Name – Emergency Lighting."

- Each local database file can be broken down into smaller sections, e.g., Emergency Lighting > Emergency Bulkheads

> ❗ For optimal performance, please limit sections to ~500 parts.

Emergency Lighting >> Manufacturer Name - Emergency Lighting

Files   Sections   Active

Edit   **Distribute**   **Move**

New   Copy   Delete   Reports   Up   Down

1   Active   Emergency Exit Boxes
2   Open   Emergency Bulkheads
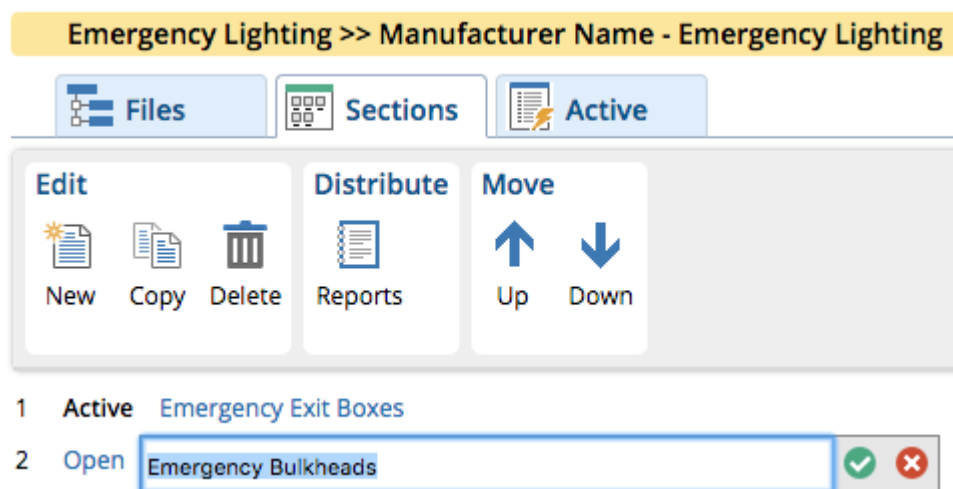
- Now either click the "Open" or "Active" button to start adding parts to a section.

Import from excel into a local database >>

Import from excel into a local database

How do I add parts into a local database section?

- Parts can be added as Blank Specials, from Catalogues, Local Data and Kits using the search tools or by importing from Excel.
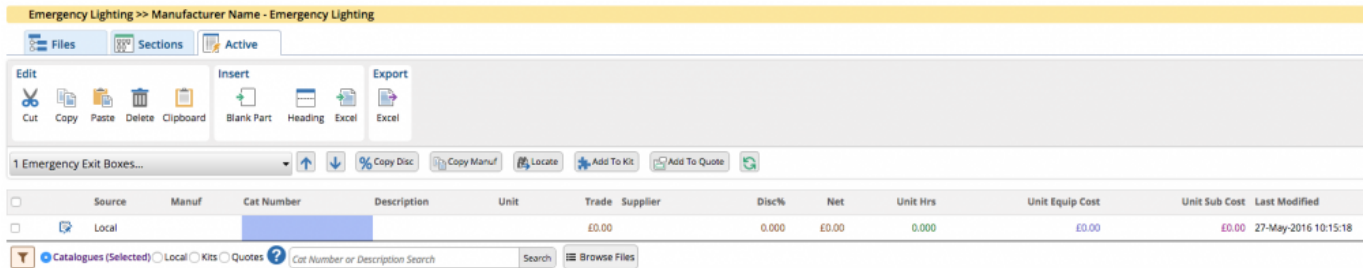
How do I import from excel into a local database?

- Importing from excel is the fastest way to build your local database, you can do this by selecting the "Excel" upload button and then chose the appropriate file to upload.

- Then map the excel fields to the Electrika fields.

Tips when preparing a file for export:

- please remember to have a row at the top with the column names.
- try and remove all formatting by copying and pasting vales only into a new spreadsheet.

! For optimal performance, please limit imports to ~500 parts.

Setting up install times and discounts

In the section will cover setting up and sharing of installation times and discounts.

- [Applying install times and discounts](#)
- [Sharing install times and discounts](#)

Applying install times and discounts

How do I apply install times and discounts to a e-Catalogue part?

- Click on the 'Disc%' or 'Hours' column for a part you wish to apply an install time or discount.

- If you click 'Disc%' a dialog to edit the discount value will be displayed.

- If you click 'Hours' a similar dialog to edit the install time value will be displayed.

- In the screens shown above type in the Discount or Install Time.
- For the install time if you type in hours the system will calculate the minutes and vice versa.
- You can choose to apply the value to a single part, a certian number of parts, all the part in the sub index or all the parts in the main index.

Sharing install times and discounts

How do I share install times and discounts?

- Click on the 'Share Install Times & Discounts' button.

- This will display a dialog box where you can type in the email address of another Electrika Cloud user and click 'Share'

- Once the user is added to the list they will have 'Can Edit' permission by default.
- 'Can Edit' permission means they can edit your install times & discounts.
- If you want to allow a user to view the install times & discounts but not edit them you can change their persmission by clicking on the 'Can Edit' link, which allows you to toggle between 'Can Edit' and 'Can Read'

How do I use install times & discounts from other user?

- If another user has shared their install times and discounts with you, they will appear in the drop down list.
- Select the user whose install times & discounts you wish to use from the drop down list.

- When selecting another user you will be prompted for confirmation.

- This install times and discounts from the other user will then be displayed.

Price buildup

Understanding the breakdown of your quotation is important to ensure accuracy. Electrika gives a breakdown of material, labour, overhead and profit as well as preliminaries.

- Understanding price buildup
- Cost prices
- Overhead and profit
- Preliminaries, extras and MCD
- Tender sell
- Provisional sums

Understanding price buildup

- The final tender price is made up of material, labour, plant and equipment, subcontract and spread costs.
- Material, labour, plant and equipment and subcontract costs can all have overhead and profit markups.
- Spread costs are made up of preliminaries (eg. scaffolding hire), extras (eg. Packing duty/Freight) and Main Contractors Discount and do not have any markups.
- Spread costs are averaged out across material and / or labour and are included in the unit sell price of all the parts.
- Provisional sums (eg. disturbance allowance) can also be included and shown separately to the tender price.

Cost prices

Material cost

- The material cost is the total net price after discount for all the parts in the project.
- The material cost for the project are broken down by product group as shown below.

Labour cost

- The unit labour cost is the unit labour rate (£/hour) multiplied by the installation time (in hours). The total labour cost is the unit labour cost multiplied by the quantity of that part.
- The total labour cost for each labour type used in the project can be viewed by clicking on the 'Labour Cost' panel.

Labour	Total Hrs	Rate/Hr	Cost
Apprentice	9.00	£4.50	£41.00
Approved Elect.	393.29	£26.50	£10,430.82
Commissioning	0.00	£11.00	£0.00
Foreman	0.00	£10.90	£0.00
Labourer	15.00	£5.00	£75.00
Subcontract	74.50	£10.00	£745.00
			£11,291.82

Plant and equipment cost

- Plant and equipment costs can be included and shown separately.

Subcontract cost

- Subcontract costs can be inluded and shown separately.

Overhead and profit

- Overhead and profit markups% can be applied to individual parts or at Item (section) level to material, labour, plant and equipment and subcontract.
- The accumulated overhead and profit for all the parts is totalled here for material, labour, plant and equipment and subcontract.

Preliminaries, extras and MCD

- The preliminaries, extras and Main Contractors Discount are spread across all the material and labour to form a unit rate for every part and create a Schedule of Rates.
- For each of the costs you can choose whether to spread them over material, labour or both.
- The preliminaries and extras are added to the tender price without any additional overhead or profit markup, as it is assumed that the cost of preliminaries and extras is passed on directly to the client. If you wish you can include any overhead or profit within the costs stated here. For example, if cost of scaffolding hire is £1,000 you may want to enter £1,100 to include 10% for handling.
- If you do not wish to spread preliminaries and extras on materials and labour then you should create separate Items for them and add each entry as a special or from your local data, leaving the values here blank. You would then be able to add overhead and profit, and the preliminaries and extras would be shown priced separately on the quotation.

How do I add new preliminaries or extras?

- Click on the 'Preliminaries' panel to expand it and then click on the 'Add New' button.

- This will display a dialog box where you can enter the type of preliminary, quantity and the cost.

How do I edit a preliminary or extra?

- To edit the preliminary or extra click on .

- This will display a dialog box with the values in the edit boxes, simply type in the new values and click on 'Apply' as shown below.

How do I delete a preliminary or extra?

- Click on the 🗑 button to delete a preliminary or extra.

How do I spread a preliminary or extra on the material or labour costs?

- To spread the cost on material and / or labour, click on ✅ or 🚫 .

- This will display the edit dialog. Check / uncheck 'Spread On Material' or 'Spread On Labour'.

- How do I set the default preliminaries or extras for future projects?

There is a default list of preliminaries and extras for each new project. Any changes that you make to a list will stay with the project. To use the list for all new projects you need to save the list as default.

- Expand the Preliminaries or Extras panel.
- Click on the 'Save as Default' button.

> ✳ The default list does not save the values. On starting a new project you will always have zero values for preliminaries and extras.

Main Contractors Discount

What is the Main Contractors Discount?

- The Main Contractors Discount (MCD) is usually 1/39th or 2.5% discount on the tender amount for payment within terms, however the amount can vary.
- Although referred to as a 'discount' the MCD is added to the subcontractor's tender amount that the main contractor submits to the client. When the subcontractor invoices the main contractor he deducts the MCD for payment within terms, hence the term 'discount'.
- To add the MCD you have to calculate what the tender price would be so that when you take off the MCD you get back to your original value.
- This is done using the formula:
- Tender price after MCD = tender Price before MCD / ((100-MCD%)/100) e.g. tender Price before MCD was £10,000 and MCD of 2.5% Tender price after MCD
- = £10,000 / ((100-2.5)/100)) = £10,000/0.975 = £10,256.41
- When giving the discount you then take 2.5% off the £10,256.41:
- 2.5% discount = 0.025*£10,256.41=£256.41

How do I change the Main Contractors Discount?

- Click on the 'Main Contractors Disc' panel to expand it.
- Click on the 'Main Contractors Discount at 2.50%' link.

- This will display a dialog box to edit the Main Contractors Discount.

How do I apply the Main Contractors Discount?

- To apply the Main Contractors Discount you must spread on material and / or labour using the checkboxes as shown below.

Tender sell

The Tender sell includes all the costs, markups and spread costs.

Adjustment Value

The preliminaries, extras and Main Contractors Discount are spread across the material and labour to create an itemised Schedule of Rates.

This creates a rounding difference because each unit rate is shown to two decimal places. The total of all the rounding differences makes up the adjustment value.

Provisional sums

Provisional sums are extra costs that are not included in the tender price but may be required at some stage of the project.

		Item	Qty	Unit	Total
		Outside Lighting	1	£300.00	£300.00
		Replace Distribution Board	1	£180.00	£180.00
		Replace Wiring	1	£250.00	£250.00
		Disturbance Allowance	3	£300.00	£900.00
					£1,630.00

▾ Provisional Sums — £1,630.00

Add New — Save As Default

Creating and managing reports

Electrika has powerful and customizable reporting tools for quotes, invoices and orders. These reports give you the option to track e-mail and it for you once your report has been read.

- [Organizing reports](#)
- [Printing and exporting reports](#)
- [Emailing reports](#)

Organizing reports

- [Customer and internal reports](#)
- [Excluding certain pages](#)
- [Including or excluding prices](#)
- [Changing page size](#)
- [Customizing the header with logo](#)
- [Adding project site details](#)
- [Customizing footer logo and text](#)
- [Customizing the email signature](#)
- [Adding Terms & Conditions](#)
- [Including Tax or VAT](#)

Customer and internal reports

Separate reports have been designed for customer and internal use. Customer reports are designed to include a cover page and / or terms and include only certain columns.
The internal reports can contain more detailed information such as overhead and profit markups, bill of materials or labour hours.

How do I change report types?

- Click on the 'Customer' or 'Internal user' radio button and then select the type of report you would like.
- Various other options are enabled or disabled depending on the option that you select.

Excluding certain pages

You may not want to print or email all the report pages. For example, you may want to skip the cover page or the terms & conditions page.

How do I include or exclude the cover page?

- Check / Uncheck the 'Include cover page' checkbox.

How do I include or exclude the Items or parts list?

- Check / Uncheck the 'Items List' or 'Parts List' checkbox.

How do I include or exclude the terms & conditions?

- Check / Uncheck the 'Include Terms & Conditions' check box.

Including or excluding prices

How do I include or exclude price or discount?

- You can choose whether to display Item prices and / or part prices and also whether to show the tender price on the cover page by ticking the check boxes as shown below.

Changing page size

How do I change the report page size format?

- By default, reports are in A4 paper size format. Select A4 or Letter to change the page size format.

Customizing the header with logo

How do I add my company logo to the cover page?

- Click on the 'Company logo' link to browse for an image file and add to your cover page.
- Click on the 'Preview' tab to preview the cover page

How do I add my company address to the cover page?

- Click on the 'Company address' link.

- This will display a dialog where you can enter your company address details.

Edit Company Address

iT ▾ A ▾ **B** *I* U ⋮≡ ≣ ≣ ≣ ≣ ⧟ ⧟ ✎

Electrika Ltd
Park Way House
Palatine Road
Northenden
Manchester
M22 4DB

Apply

Adding project site details

How do I add site details to the report?

- You have to link a company to your project in order to add it as a site.
- Once you have associated a company with your project click on the 'Site details' link.

- This will display a dialog showing the companies linked with the project.
- Select one of the companies by clicking on the radio button and the system will set the company as a site on the cover page.

		Folder	Company Name	Address	Tel
	Customers	Electrika Ltd	Northenden	+44 (0)161 945 5124
	General	HILLMAN & SONS LTD		0208 333 2444
	Suppliers	City Electrical Factors		

Select a company as site

Customizing footer logo and text

How do I add a footer logo to my cover page?

- Click on the 'Add footer logo' and browse for up to three logo image files.
- You can remove the logos by clicking on the ⊗ button.

How do I add the footer text to my cover page?

- Click on the 'Footer text' links.

Customizing the email signature

How do I add an email signature?

- Click on the 'Email Signature' link.

- This will display a dialog box where you can enter your email signature.

How do I add logos to my email signature?

- Click on the 'Add footer logo' link in the 'Email Settings' panel.

- You can browse for upto three logo image files and they will be added to your email signature.

- You can remove logos by clicking on ⊗.

Email Settings

Email signature

Email footer logos

Add footer logo

(Upto 3 logos can be added)

Electrika

Adding Terms & Conditions

How do I add my own Terms and Conditions?

- Click on the 'Edit Terms & Conditions' link.

- This will display a dialog where you can edit your Terms and Conditions.

Edit Terms & Conditions

Your Terms and Conditions go here...

Apply

Including Tax or VAT

How do I include tax or VAT?

- Click on the 'Add' check box as shown below to add tax or VAT to your tender price.
- You can change the label of the tax type as required by typing in the text box outlined in red below.
- You can change the value of the tax or VAT as a percentage by typing in the text box outlined in blue below.
- These values will stay with the project.
- If you would like to use these values for all new projects then click on the 'Save as default' button.

Quotes | Search Quotes

In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room

Files | Project | Items | Active | Costing | Summary | Reports

Options | Preview | @ Email

Who is the report for?

◉ Customer
Includes Cover page and Terms & Conditions and the email page gets filled in with the contact email and quotation message

○ Internal user
Leaves out Cover page and Terms & Conditions and the email page is blank

Select report type

Sell prices	Cost Views	Sell Views	Other
◉ Show Final Unit Sell & Total	○ Material Cost	○ Material Sell	○ Bill Of Materials
○ Show Sell Price Buildup	○ Labour Cost	○ Labour Sell	○ Labour Hours
	○ Mat & Lab Cost	○ Mat & Lab Sell	
	○ Equipment Cost	○ Equipment Sell	
	○ Subcontract Cost	○ Subcontract Sell	

Select what to show

Include the following pages in the report
☑ Items List ☑ Parts List ☐ Provisional Sums
☐ Include Terms & Conditions 📄 Edit Terms & Conditions

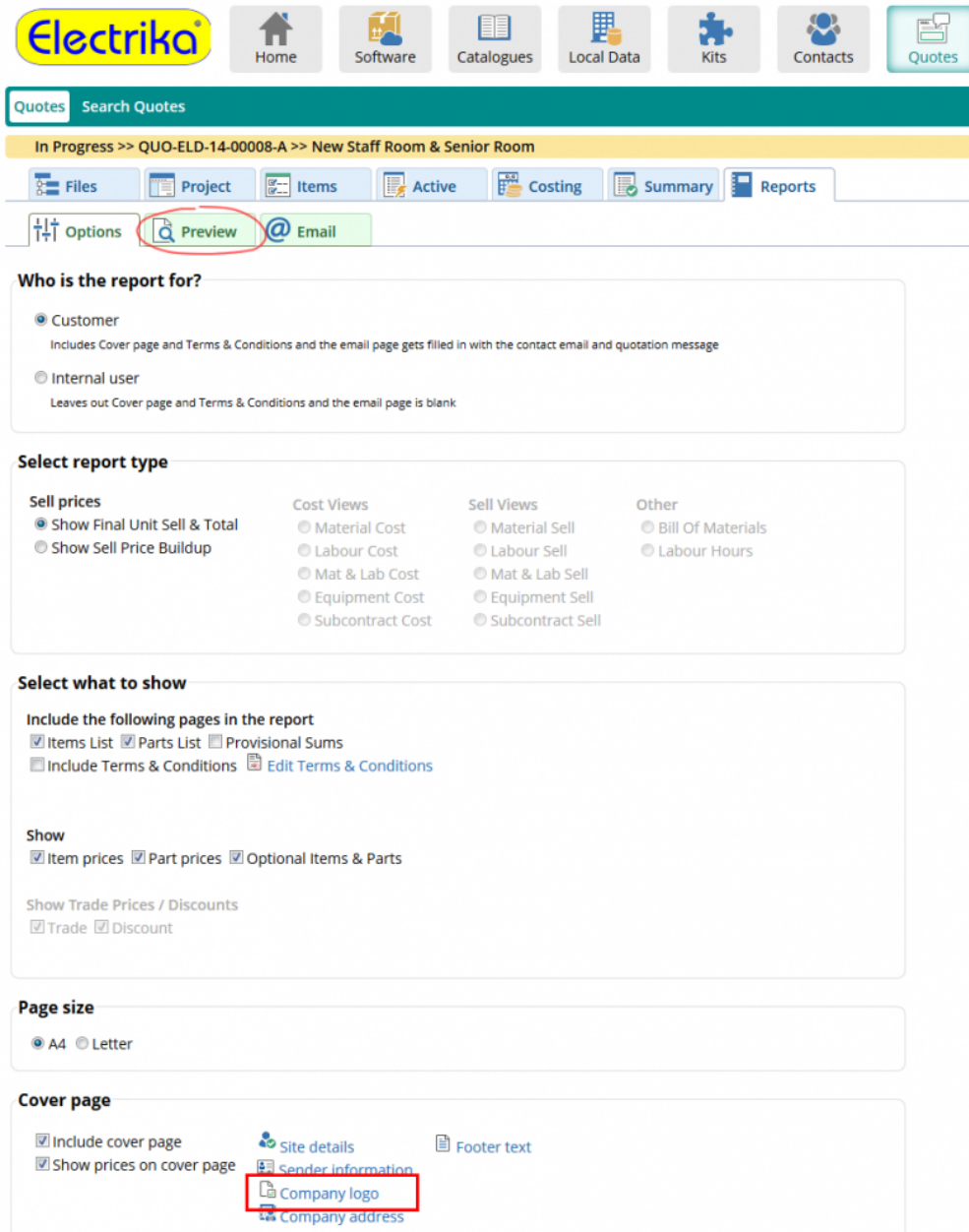**Show**
☑ Item prices ☑ Part prices ☑ Optional Items & Parts

Show Trade Prices / Discounts
☑ Trade ☑ Discount

Page size

◉ A4 ○ Letter

Cover page

☑ Include cover page
☑ Show prices on cover page

👥 Site details
🔲 Sender information
📄 Company logo
🖼 Company address

📄 Footer text

Footer logos

📄 Add footer logo
(Up to 3 logos can be added)

ECA | ELECSA | NIC DOMESTIC INSTALLER

Email Settings

🖼 Email signature

Email footer logos

📄 Add footer logo
(Up to 3 logos can be added)

Tax / Vat

☐ Add [VAT] @ [2.5] % [Apply] [Save as default]
Type the label you wish to use for VAT or Tax

Printing and exporting reports

How do I print a report?

- Go to the Preview tab and click on the 'Print' button.

How do I export a report to PDF, Excel or Word format?

- Click on the 'PDF', 'Excel' or 'Word' button.

- This will display a dialog box with a link to the file that can be downloaded on your device.

Emailing reports

Sending reports using Electrika, allows you to track click thoughts to your quote, invoice or order to gauge interest. When you send your e-mail from Electrika it will in fact look as if it's from your own email address, and any replies will come directly back to your own e-mail account.

- Sending emails to multiple clients
- Attaching files to emails
- Managing email read notifications
- Tracking report emails

Sending emails to multiple clients

How do I email my report to multiple clients?

- Type in the email addresses separated by a comma.

Attaching files to emails

How do I attach other files to the report email?

- To attach other files to the report email click on the 'Browse for files' button.

Managing email read notifications

- Read notifications are related to email tracking.
- You will be sent an email telling you that the recipent has clicked the link inside the email to view the report.
- Unlike email read receipts you do not get an email until the user actually views the report.
- If you select 'Do not send me read notifications' you will not receive a notification email when the receiver clicks on the report link.
- If you select 'Send me a read notification only the first time a file is read', you will receive the email notification only once i.e. the first time the receiver clicks on the report link.
- If you select 'Send me a read notification every time a file is read', you will receive a email notification every time the receiver clicks on the report link.

Tracking report emails

Once a report email has been sent you may want to know if the receiver has actually viewed the report. This would be particularly useful if you have opted to not send any read notifications via email.
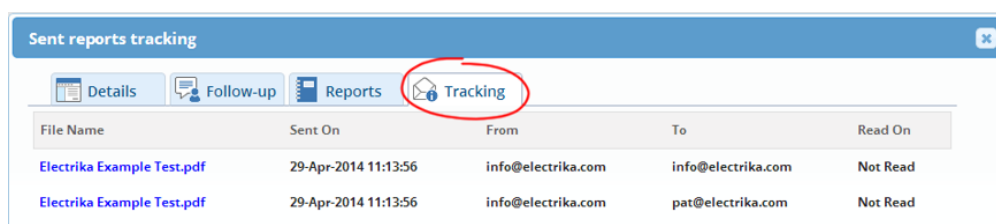
How do I track an email?

- Go to the File manager and click on the 🛈 button.

- This will display a dialog box that shows the project information
- Click on the 'Tracking' tab.

- This will display the list of emails that you have sent the report to.
- Once the receiver views the report the tracking tab will display the date and time it was viewed in the 'Read On' column.

Organizing folders

Managing hundreds of quotes or "files" can sometimes be a difficult task in itself, Electrika gives you a powerful way to take control of your workflow and help with folders.

Folders work the same throughout the whole of the application including **Quotes, Orders, Invoices, Local Data, Kits and Contacts.**

- Adding, renaming, deleting folders
- Moving folders
- Repositioning folders
- Sharing folders
- Changing shared folder permissions
- Removing users from shared folders

Adding, renaming, deleting folders

Adding a folder

How do I add folders?

- To add a folder, select the folder called 'General' or any subfolders and click the 'New' button. You cannot add folders to 'All Files', 'My Files', 'Recycle Bin' or any of the 'Shared folders'
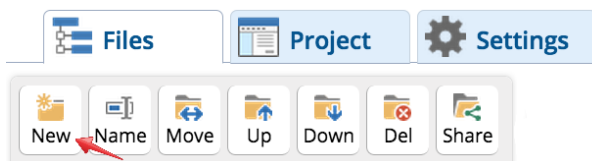
Renaming a folder

How do I rename a folder?

- To rename a folder, click on the folder to select it and then click on the 'Name' button. You cannot re-name 'All Files', 'My Files', 'Recycle Bin' or any of the 'Shared folders'
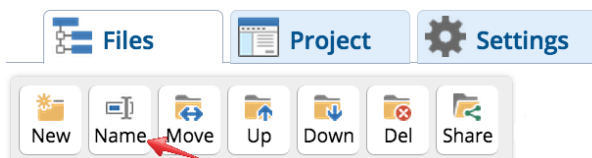
Deleting a folder

How do I delete a folder?

- To delete a folder, click on it to select it and then click on the 'Del' button. You cannot delete 'All Files', 'My Files', 'Recycle Bin' or any of the 'Shared folders'
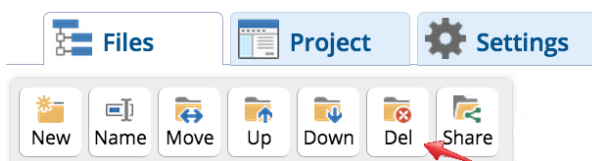
Moving folders

To organize your folder structure you may want to move your folder to a new location i.e. under a different parent folder.

How do I move a folder to a new location?

- Select the folder you wish to move and then click on the 'Move' button.
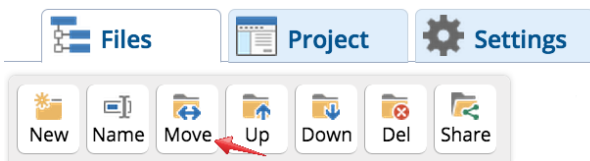
- A message will be displayed here and you can cancel the move if you wish to by clicking the 'Cancel' button.
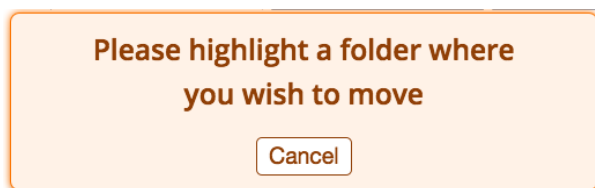
- The folders names will appear in Italics. Click on the destination folder and this will move the original source folder to the destination.
  Moved Folder
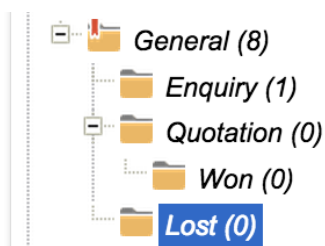
Repositioning folders

How do I move folders up or down?

- Click on the folder to select it and then click on the 'Up' or 'Down' buttons to move the folder up or down.
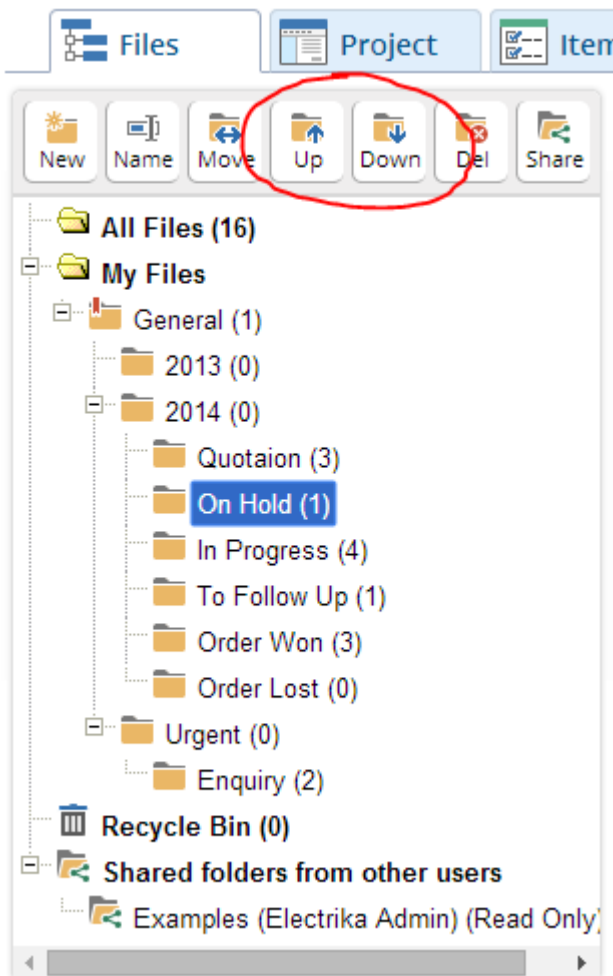
Sharing folders

You can share your folders with any Electrika Cloud user, and you can give them 'Can Read' or 'Can Edit' permissions.

How do I share folders?

- To share a folder highlight it and click on the 'Share' button.
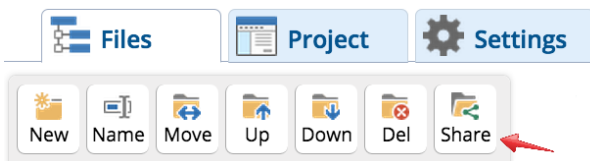
- This will bring up a dialog box:
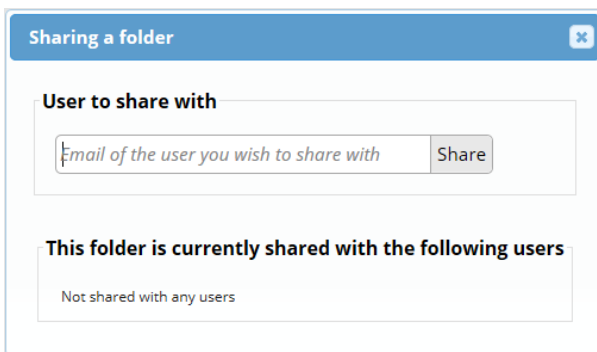
- Type in the Username i.e. Email of the user you wish to share within the input box and click on the 'Share' button. This will share the folder with the user and give them 'Can Edit' permission.
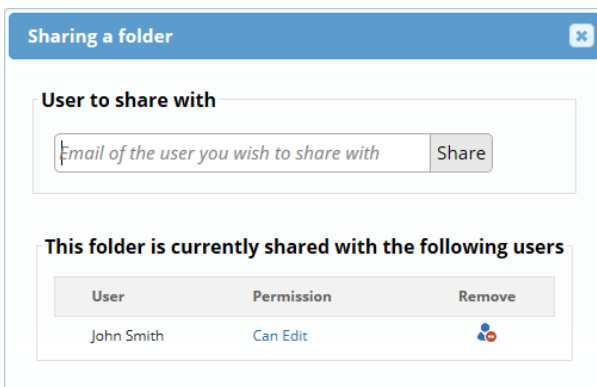
Changing shared folder permissions

When a folder is shared it is set with 'Can Edit' persmission by default.
Users with 'Can Edit' access to a folder can open and edit any file within that folder. Users with 'Can Read' access cannot open the files but can view PDF versions, add notes, change status and write follow-up notes.

To edit a file that is in a folder with 'Can Read' permission you can copy the file into your 'General' folder.

How do I change permission on the shared folder?

- To change permissions click on the 'Can Edit' or 'Can Read' link.

Removing users from shared folders

How do I remove a user from a shared folder?

- Click on the shared folder to select it and then click on the 'Share' button.
- This will show a dialog with the list of users sharing the folder.
- Click 👥⊖ to remove a user from the shared list.

Organizing files

All of your **Quotes, Orders, Invoices, Local Data, Kits and Contacts.** are held as files and are stored in the pre-mentioned folders.

Some options may or may not be available depending on the type of file you are working on. The example images in this guide or be using the quotation tool.

- [Opening a file](#)
- [Copying files](#)
- [Moving files to different folders](#)
- [Exporting files](#)
- [Deleting files](#)
- [Import files from Electrika Desktop](#)
- [Changing project status](#)
- [Managing follow-ups notes](#)
- [Searching for files](#)

Opening a file

- To open a file click, on file reference or project name.

Copying files

Electrika Online has two ways of copying a file: Copy as new revision or Copy as new quote. Copy as new revision will automatically increment a reference on the filename, to easily keep track of updated revisions of the same quote. Copy as new quote will create a new quote with the same information.

The copy file feature comes in handy if you want to use a shared file that is created by another user.

How do I copy files?

- Select a file to be copied and click on the 'Copy' button.
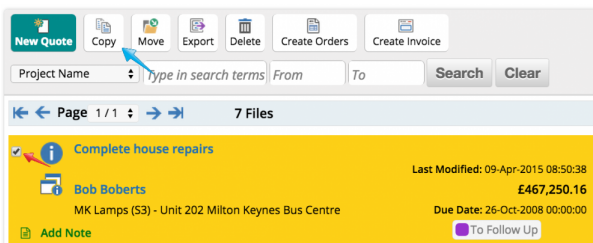
- If the file is not shared from another user, then a dialog will appear to choose either Copy as new Revision or Copy as new quote. If the file is a shared file from another user, the file will be copied and added to the General folder.
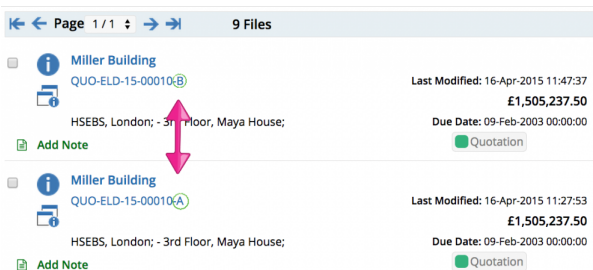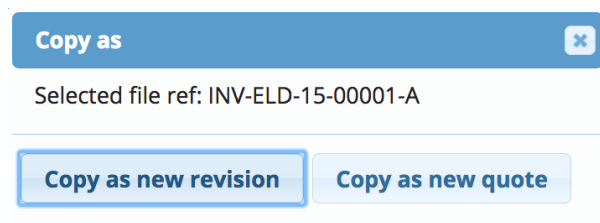
Moving files to different folders

Sometimes you may want to move a file to a different folder to organize your files.

How do I move files?

- Select a file and click on 'Move' button.
- Then select a destination folder of your wish and the selected file will be moved in the destination folder. If you wish to cancel the move click on the 'Cancel' button on the displayed dialog.

Exporting files

How do I export files?

- To export the files in Excel format, click on the 'Export' button

Deleting files

How do I delete files?

- To delete files, select one or multiple files and click on the 'Delete' button.
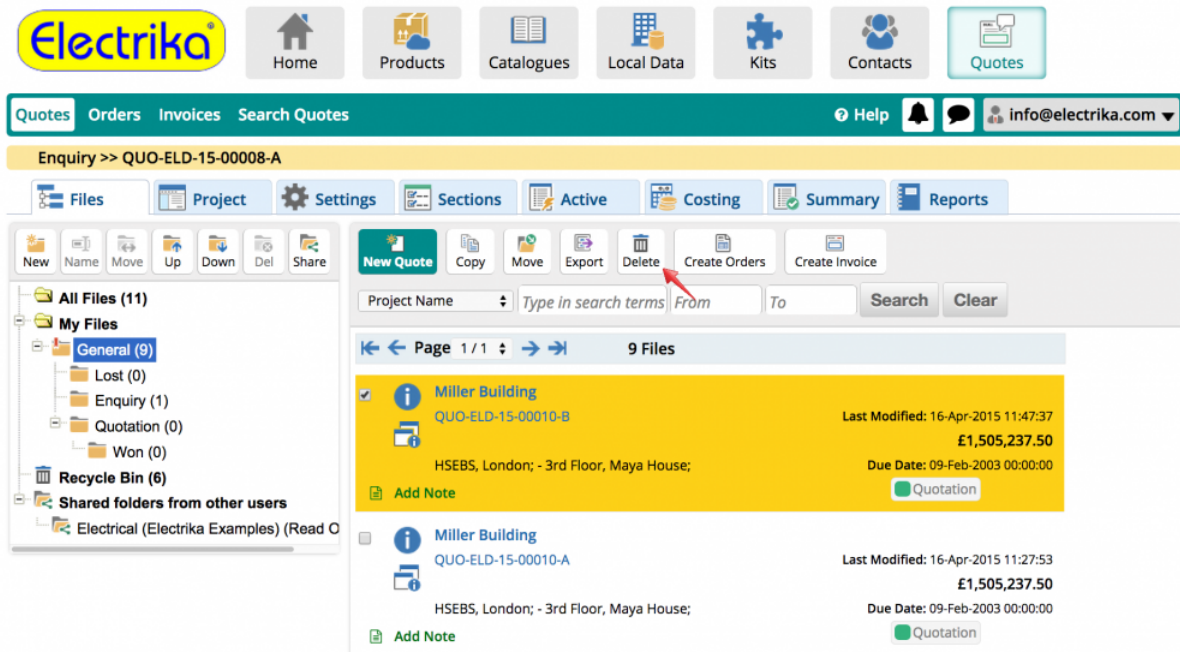
- These files are then moved to the 'Recycle Bin' folder. To delete the files permanently select files from 'Recycle Bin' folder and click on the 'Delete' button as in previous step.
- If you wish to empty your 'Recycle Bin' folder click on the 'Empty' button which is only available for the 'Recycle Bin'.
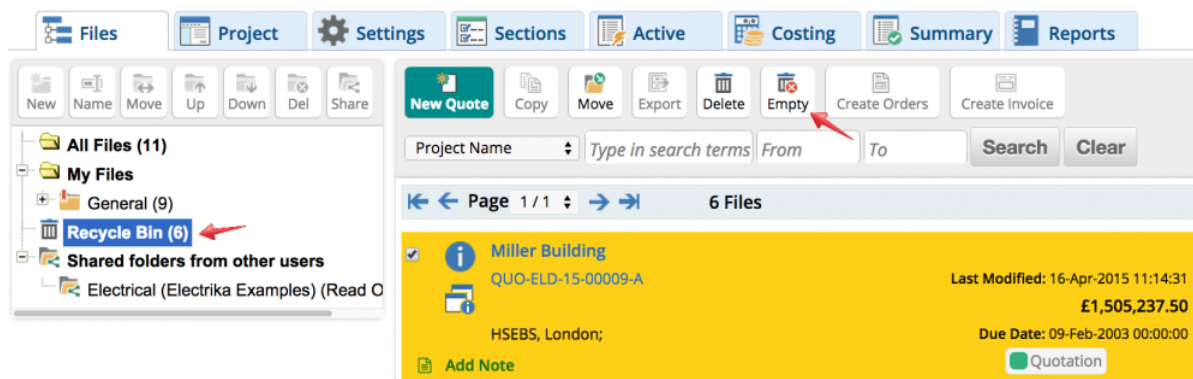
Import files from Electrika Desktop

If you have been using Electrika Desktop for years you may have hundreds of files on your local machine. To use them in Electrika Cloud you need to use the Electrika Uploader.

How do I import or bring files from Electrika Desktop?

- First upload files using Electrika Uploader.
- This will show a button called 'Uploaded files ready to import'.
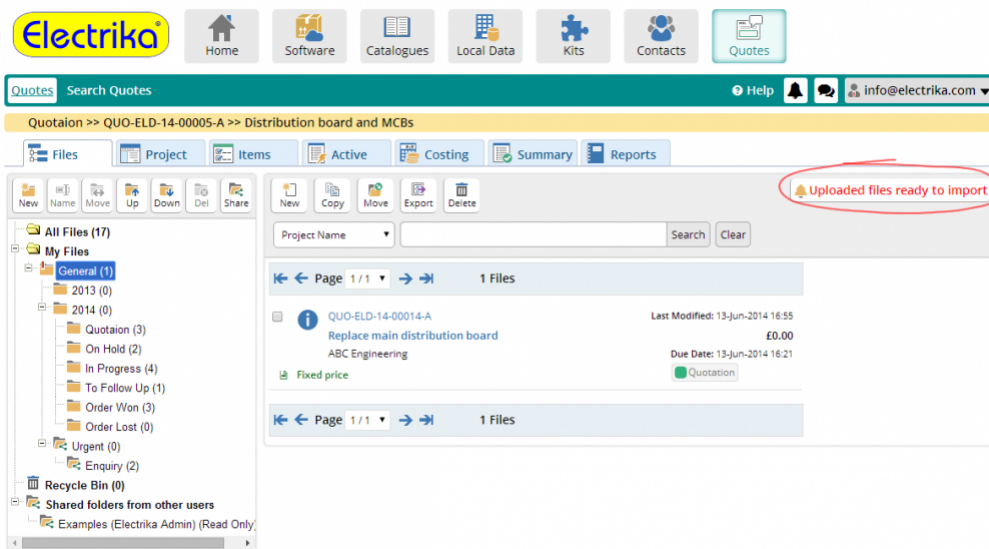
- Click on the button and a dialog with the list of files uploaded will apear.
- Select the files you wish to import and click the 'Import' button.
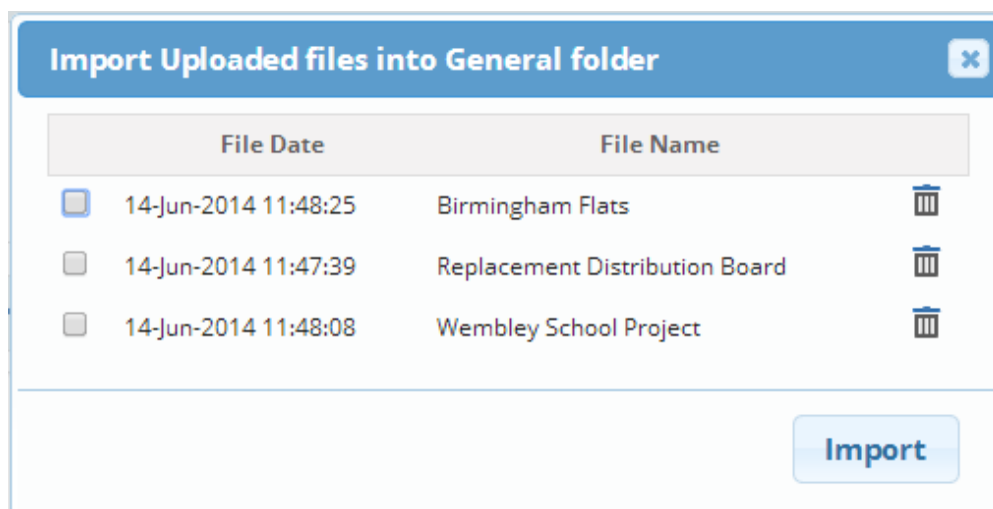
Changing project status

Project status lets you know the status of the project whether it is won, lost, in-progress etc.

How do I change status?

- Click on the status button.
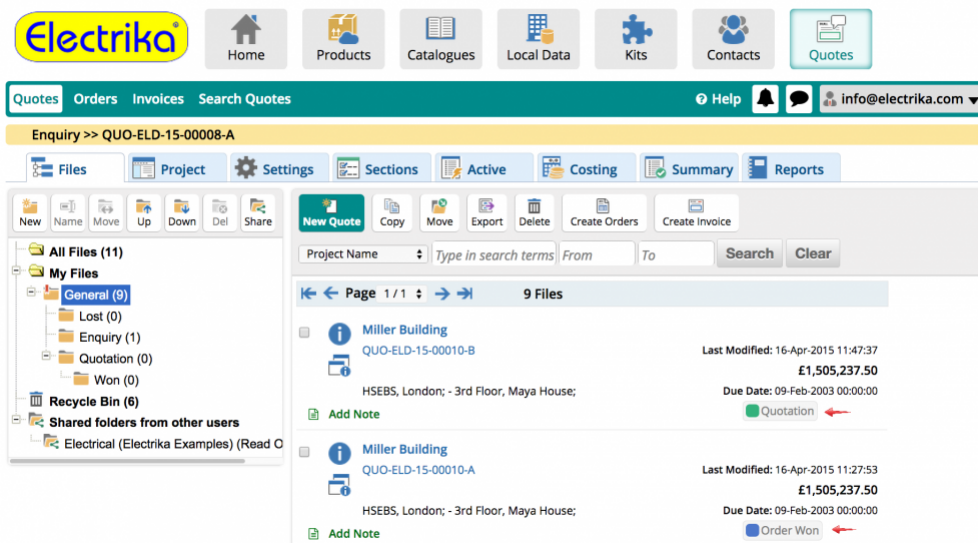
- A dialog will appear where you can choose from and change the status.
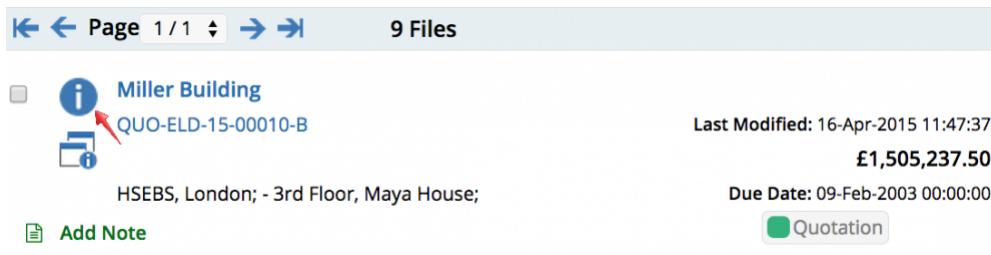
Managing follow-ups notes

Follow-ups are used to keep track of all the follow-ups regarding some quote. It helps you keep notes about particular customers or specific jobs.

How do I add Follow-up notes?
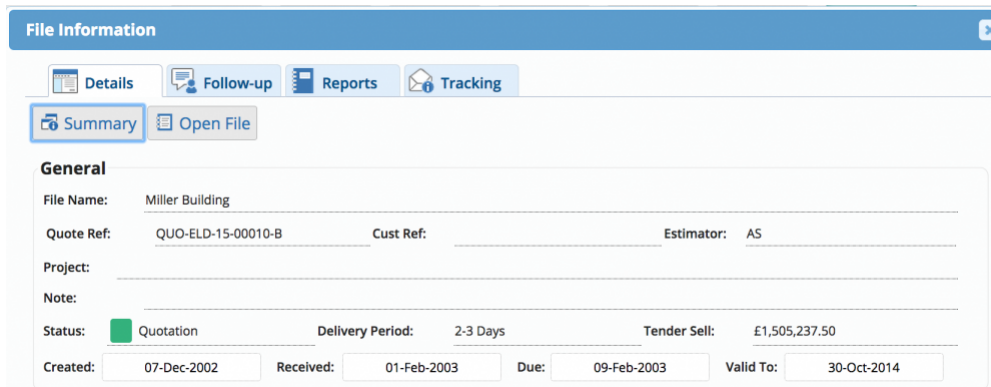
- To add Follow-up notes, click on ⓘ

- This will display a dialog where you can get all the information about the file. This will work even for files you only can 'Can Read' access for. On the File Information dialogue, click on the 'Follow Up' tab
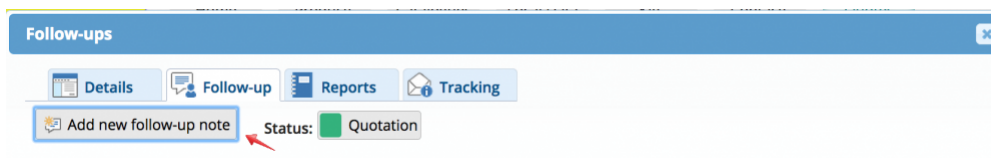
- Click on the 'Add new follow-up note' button to add some notes.

- This will open a dialog box to add the notes.

- Here you can select how you contacted the customer and type in your notes to save them.

- Once saved you can then either edit the note or delete.

Searching for files

Searching could be particularly useful once you have a lot of files and folders.

How do I search for a file?

- Select the field to search by from the list as marked in blue.
- Type in the search terms and click on 'Search' button.
- To clear the search result click on the 'Clear' button.

> ✱ The search is filtered by the folder being selected. To search from all the folders click on the folder called 'All Files' and then search.

Organizing companies and contacts

Companies and contacts can be linked with projects and are organised in very much the same **Quotes, Orders, Invoices, Local Data, and Kits.**

A company can have multiple contacts, as well as contacts having multiple links to different companies.

- [Adding a new company](#)
- [Adding a new contact to a company](#)
- [Moving contacts between companies](#)
- [Updating or deleting companies](#)
- [Updating or deleting contacts](#)
- [Setting up a default address column](#)
- [Copying companies](#)
- [Moving companies](#)
- [Linking companies to a project](#)
- [Setting a default company or contact](#)
- [Importing and exporting contacts](#)
- [Searching companies and contacts](#)

Adding a new company

In Electrika Cloud you must first create a company and then add contacts to that company. In this way you can have multiple contacts grouped together under the same company.

How do I add a new company?

- To add a new company, click on the 'New' button, to display a form and enter the new company details.
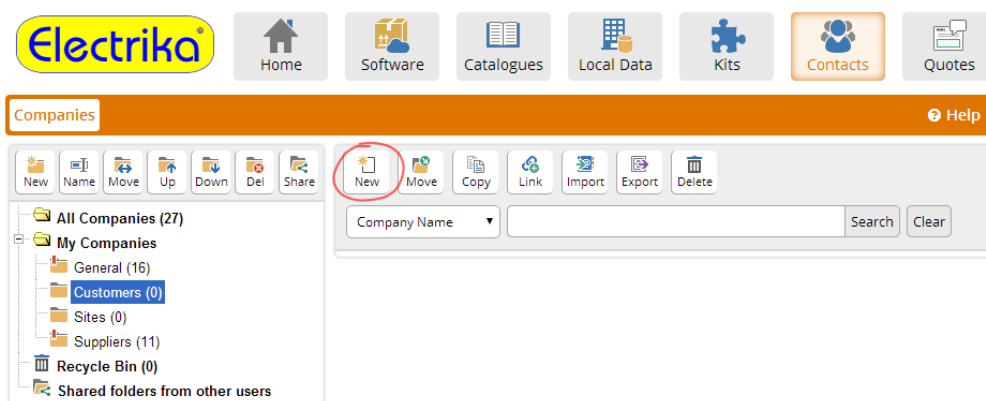
Adding a new contact to a company

How do I add a contact person to a company?

- Click on the 👥 button on the company that you want to add the contact.
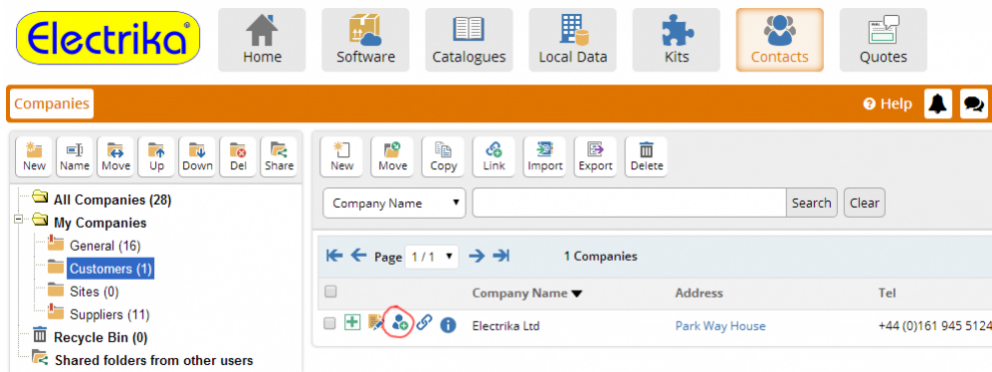
- At any time you can click on the ➕ Grid Expand button to see the contacts associated with the company.

Moving contacts between companies

How do I move a contact to another company?

Click on ![+] to expand the company and view their contacts.
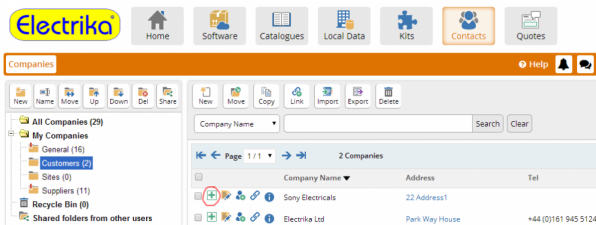
- Select the destination company where you want to move the contact. Click on the button on the contact that you wish to move.
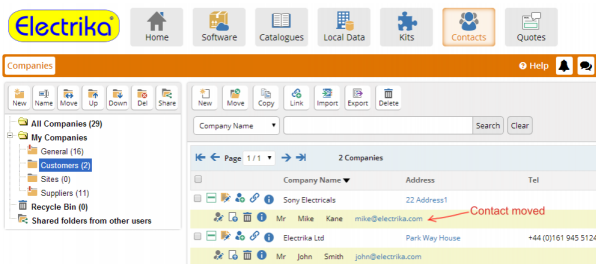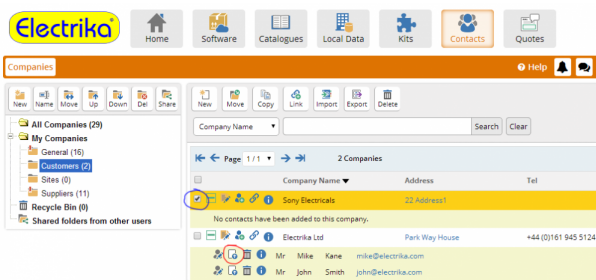
Updating or deleting companies

How do I update a company?

- Click on the ![edit] button.
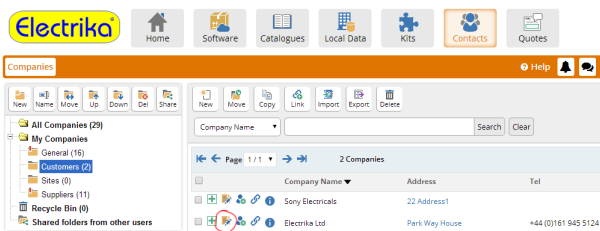
How do I delete a company?

- Select the company you wish to delete.
- Click on the 'Delete' button.
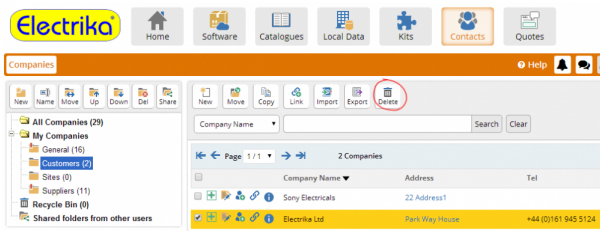
Note

✳   If the company is linked to one of the projects it cannot be deleted.
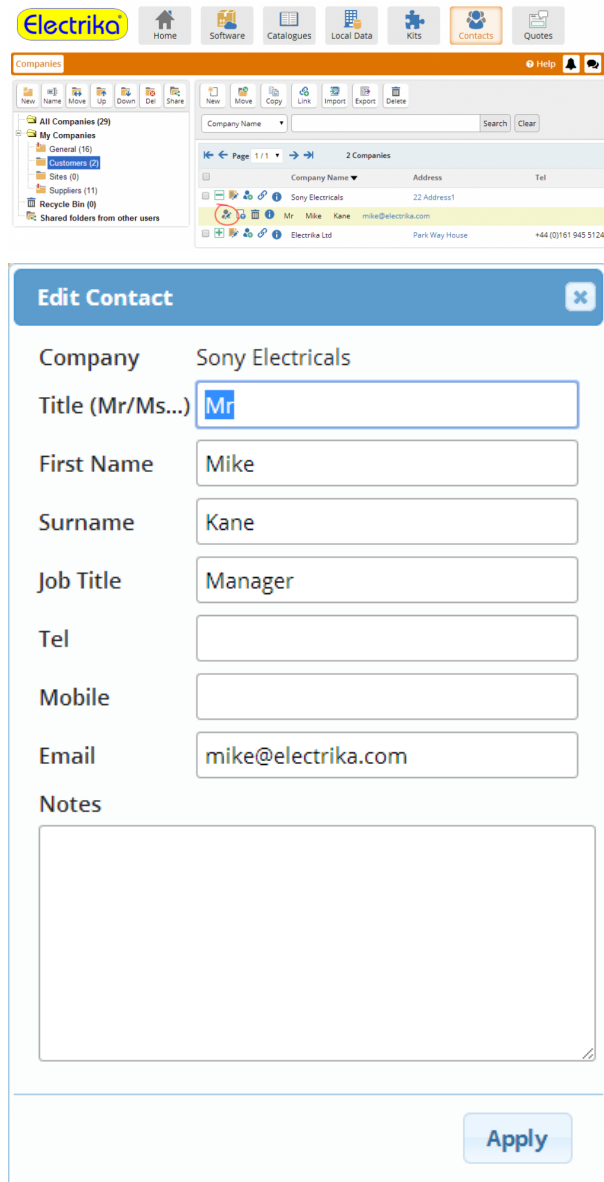
Updating or deleting contacts

How do I update a contact?

- To update a contact, expand the company that contains the contact you wish to update.
- Click on the 👥 button.

How do I delete a contact?

- To delete a contact, expand the company that contains the contact you wish to delete.
- Click on the 🗑 button.

- Please note there is no Recycle Bin for the contacts so if a contact is deleted it cannot be retrieved.
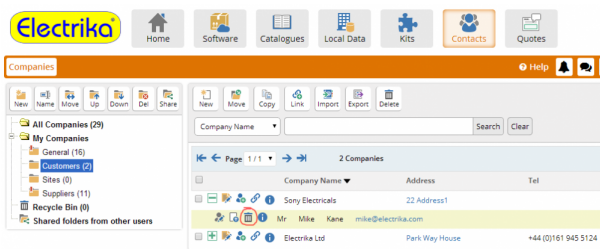
Setting up a default address column

You can add upto six lines for the address details. To keep the contacts list short and clear only one address column is displayed when you are browsing the companies, and this is called the 'default address column'.

The default address column is also used when you select search by address.

This can be useful when one of the address columns is reserved for the city or region.

How do I set the default address column?

*Click on the address link on the company.
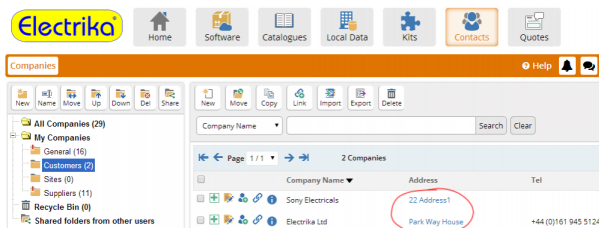
• This will display a dialog where you need to choose an address column that you wish to make default so that it appears in the company list.
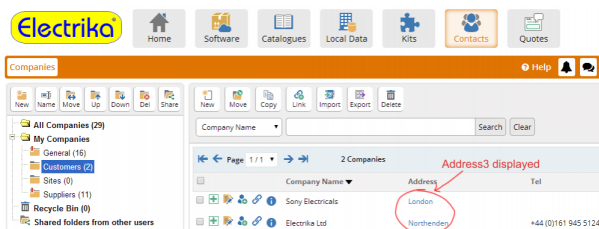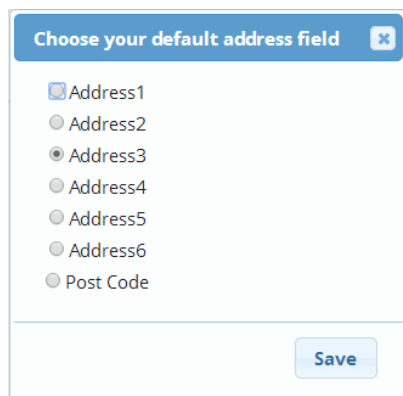
Copying companies

How do I copy a company?

- Select the companies you wish to copy and click the 'Copy' button.
- Select a folder where you wish to place the copied companies. If you wish to cancel the copy simply click on the 'Cancel' button.
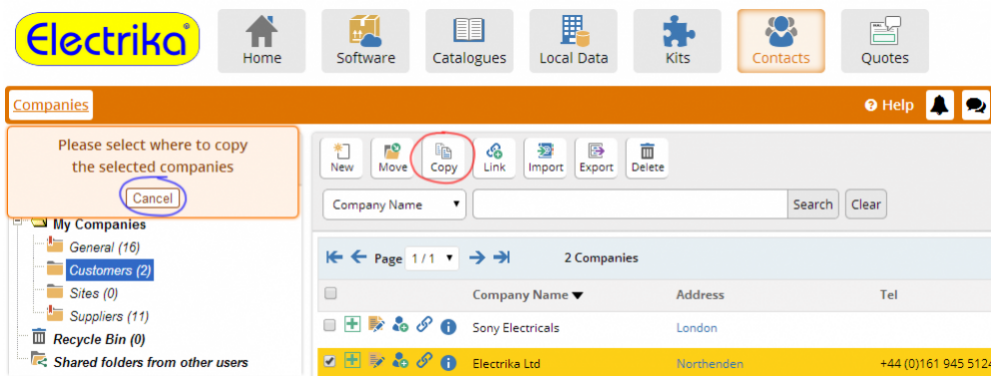
> ✳ If you wish to make a duplicate compay in the same folder simply click on the already selected folder.

Moving companies

How do I move a company to a different folder?

- Select the companies you wish to move.
- Select a folder where you wish to move the companies. If you wish to cancel the move simply click on the 'Cancel' button.

Linking companies to a project

Any number of companies can be linked to your project including customers, sites and suppliers. The companies are linked to a project (not copied) and so any changes made within the project will be reflected in the contact manager and vice versa .

How do I link a company to a project?

- Select one or more companies you wish to link to the current project.
- Click on the 'Link' button.
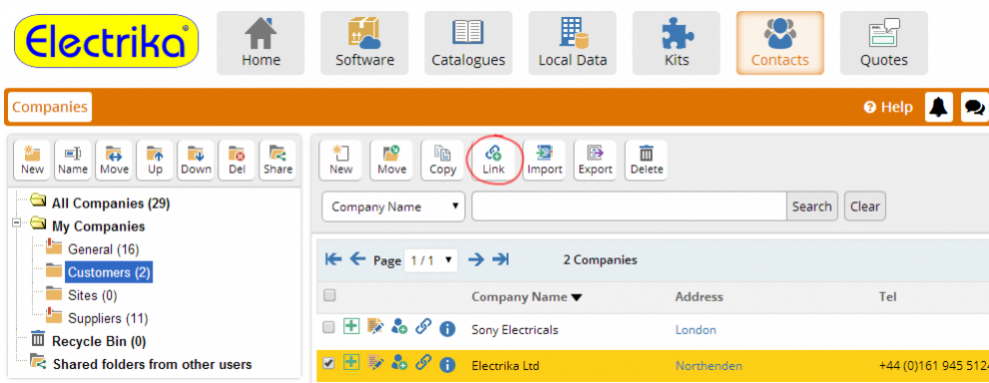
- This will redirect you to the projects page where you will see the linked companies.
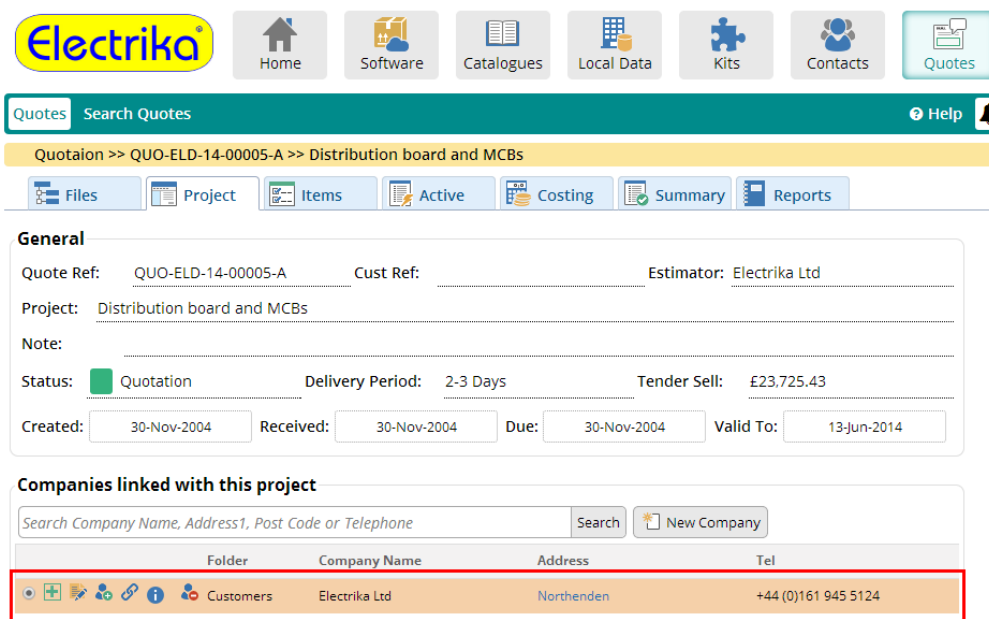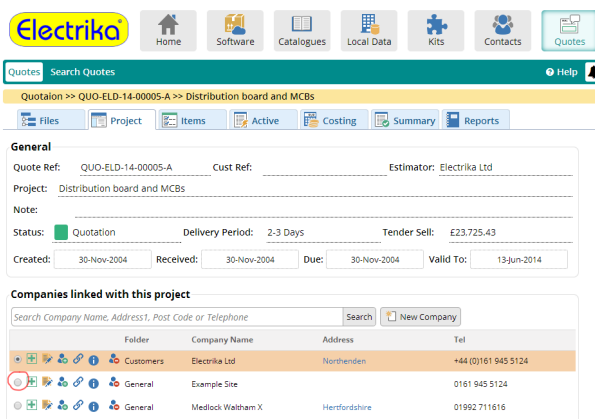
Setting a default company or contact

You can link multiple companies to a project but one of them must be set as the default that will appear on the report cover page. Similarly a company can have multiple contacts but only one of them can be set as the default and their details will appear on the report.

How do I set a default company?

- Click on the radio button as shown below to set a company as default. The default company will be highlighted in a different colour.

How do I set the default contact?

- Click on the ➕ button to expand the company whose contact you wish to set as default.
- Click on the radio button of a contact to set them as default.

Importing and exporting contacts

You can import from Excel files in .xls or .xlsx format. The companies and contacts are exported in .xlsx format.

To import companies with multiple contacts the company details must repeated alongside the contact details for each the different contacts. To clearly understand this please click here to download an example template.

How do I import contacts?

- Click on the 'Import' button.
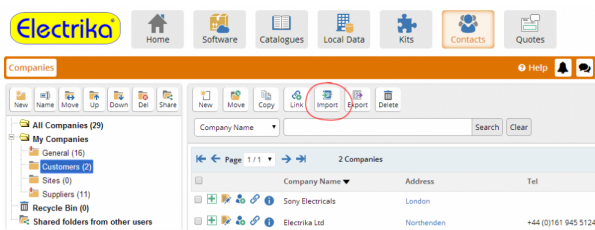
- Browse for your contacts Excel file and click on the 'Upload' button.

- On uploading the file a dialog with all the column names will be displayed.
- Against each column there will be a drop down list with the columns from the Excel file that you uploaded.
- Select the relevant column matching the column on the left. Once all the columns are selected click on 'Import'

How do I export contacts?

- Click on the 'Export' button.
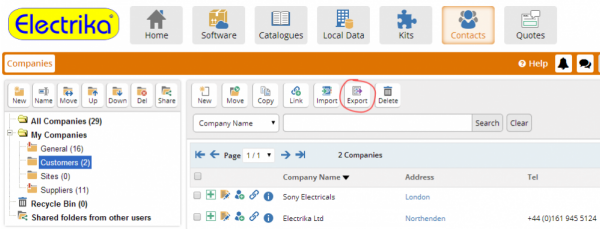
Searching companies and contacts

How to search for a contact?

- Select the column you wish to search from the drop down menu.
- Type in the search terms and click on the 'Search' button.
- To clear the search result click on the 'Clear' button to revert back to the orignal view.
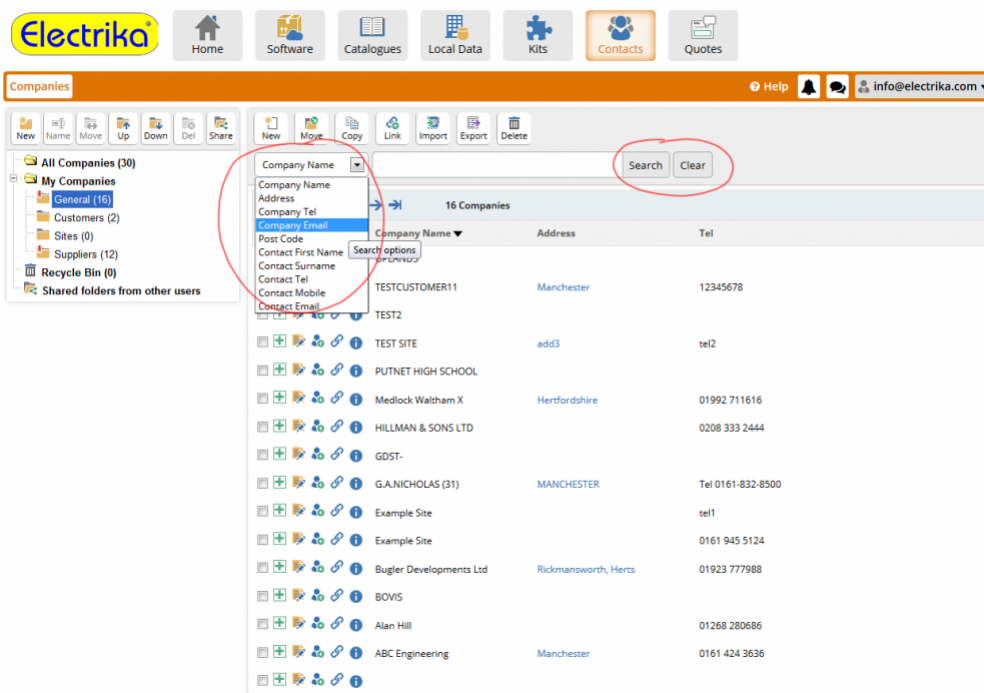
Transfering files from Electrika Desktop

If you're an existing user of the Electrika desktop and would like to move to Electrika cloud, this section will cover everything you need to know to make the transition.

- [Setting up Electrika Uploader](#)
- [Signing in](#)
- [Browsing for the Electrika folder](#)
- [Uploading quotes, local data & kits](#)
- [Uploading contacts](#)
- [Uploading install times & discounts](#)

Setting up Electrika Uploader

- Click on 'Software' and select 'Desktop Downloads'.
- If you are not already signed in, sign in to Electrika.
- Click on the 'Upload' link to download and run the setup program for the uploader.

- Now double click on the setup file and follow the wizard to setup the software.
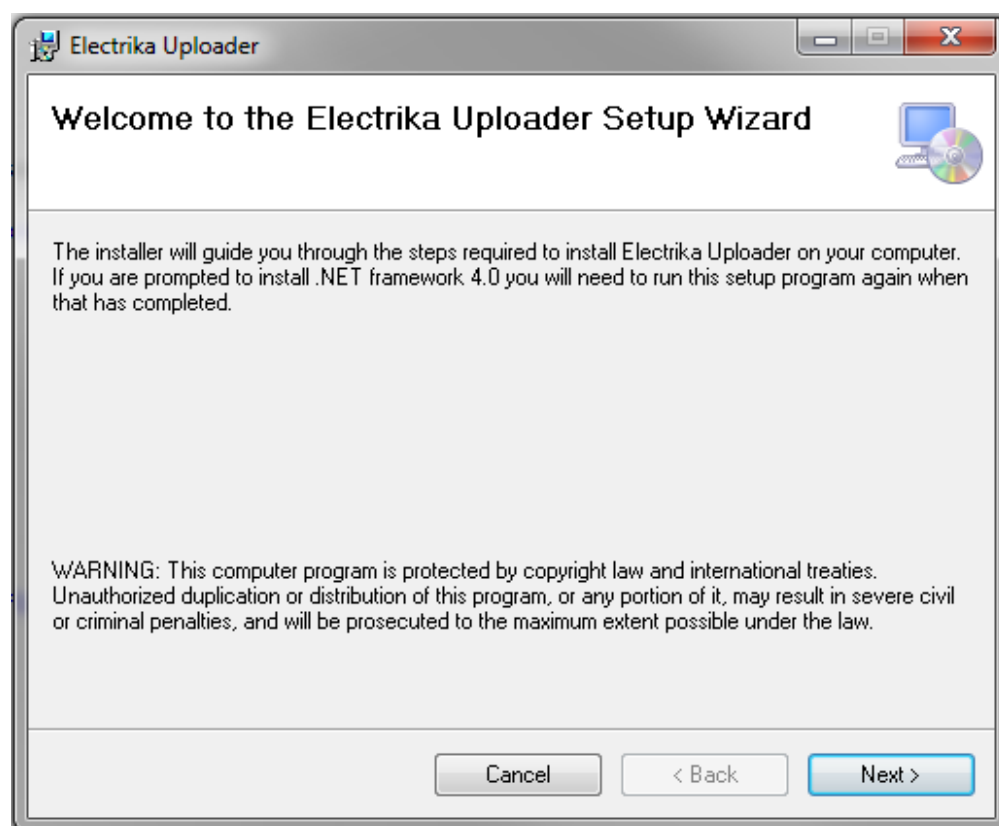
Signing in

- When running the software for the first time you will have to sign in with your Electrika email and password.

Browsing for the Electrika folder

- The system finds your default Electrika Desktop quotes folder and displays all the files within it.
- To browse to a different location click on the 'Browse for folder' button.
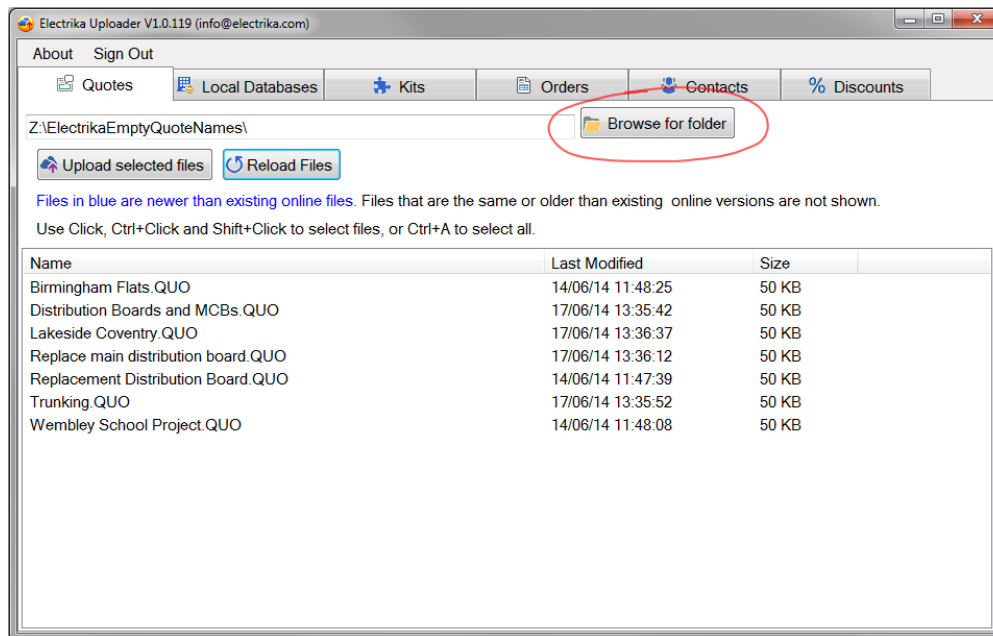
Uploading quotes, local data & kits

- To upload files click on the file(s) you wish to upload.
- To select multiple files use Ctrl+Click.
- To select a set of files use Shift+Click.
- To select all files use Ctrl+A.
- When you have made your selection click the 'Upload selected files' button.
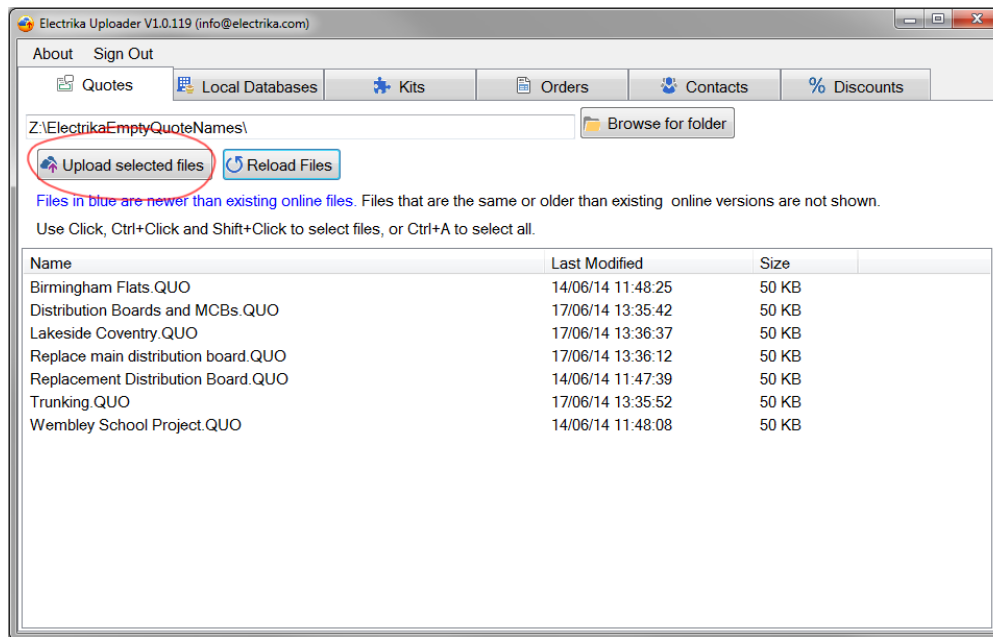
- This will start uploading files and a progress dialog window will be displayed.
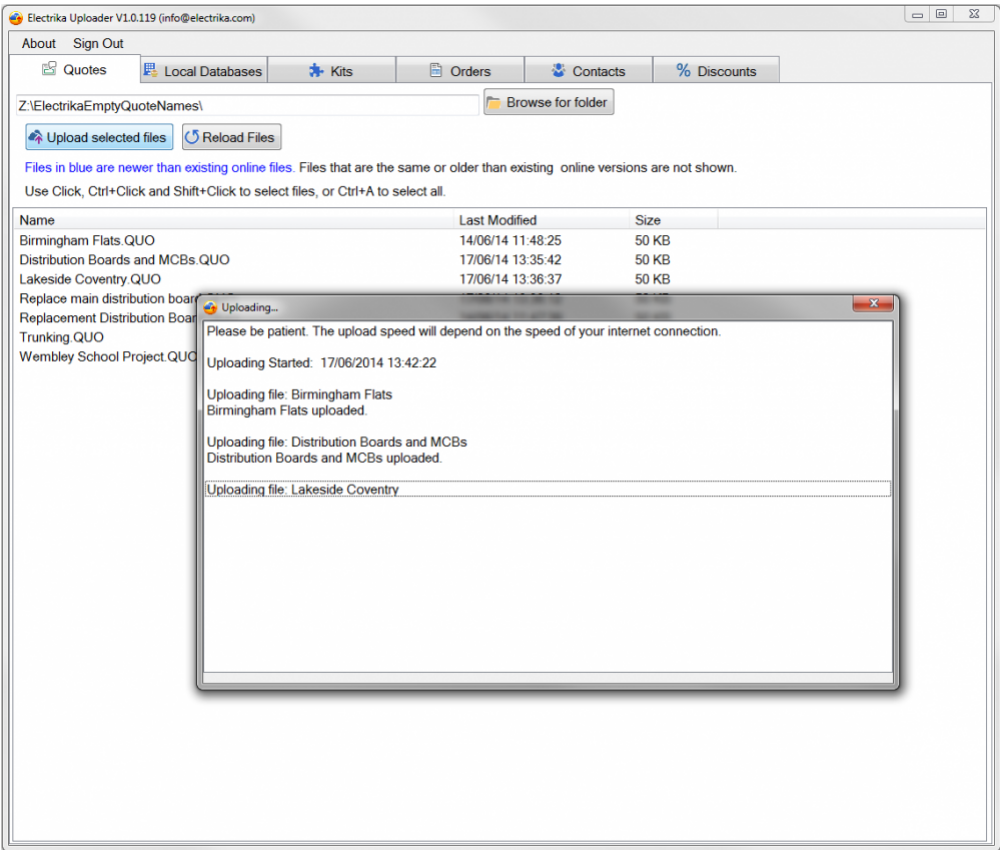
✱ Files shown in blue are newer than existing online files and can be uploaded again.
Files that are the same or older than the existing online versions are not shown.

Uploading contacts

- Your suppliers, customers and sites from Electrika Desktop can be automatically located and uploaded to Electrika Cloud.
- Click on 'Upload Suppliers', 'Upload Customers' or 'Upload Sites'.
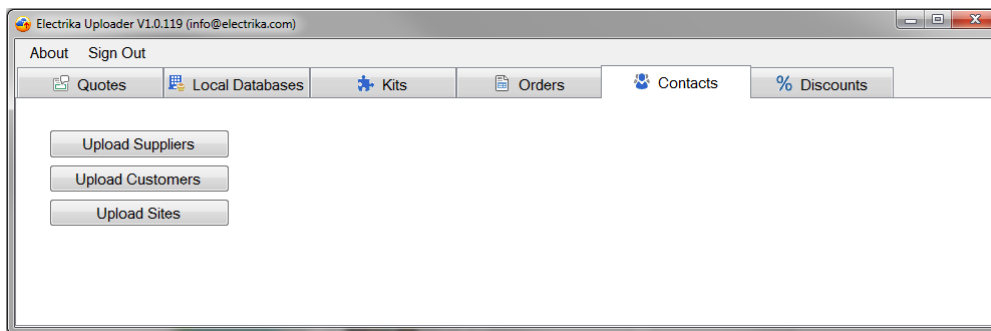
Uploading install times & discounts

- To upload install times & discounts go to the 'Discounts' tab.
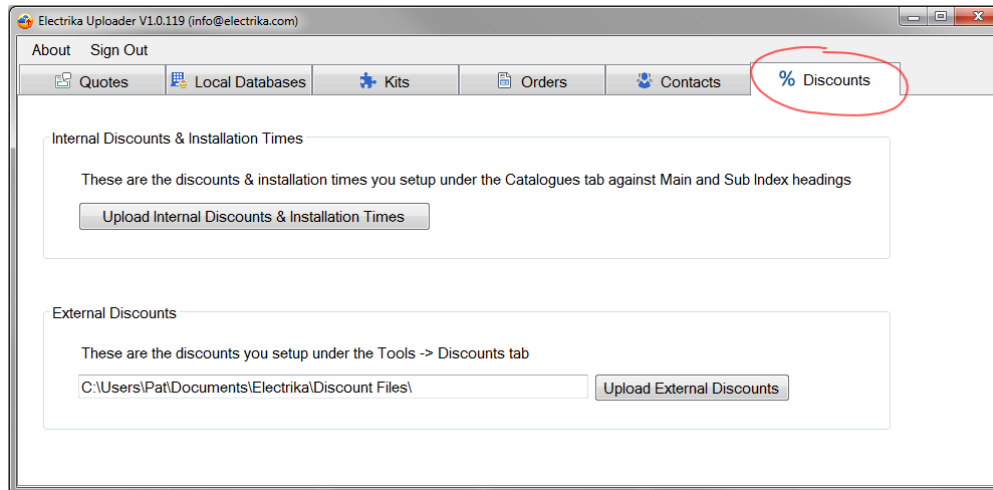
- Click on 'Upload Internal Discounts & Installation Times' to upload the internal install times & discounts that you might have setup under the Catalogues tab against main and sub Index headings on Electrika Desktop.
- This will start uploading and a dialog window will be displayed.
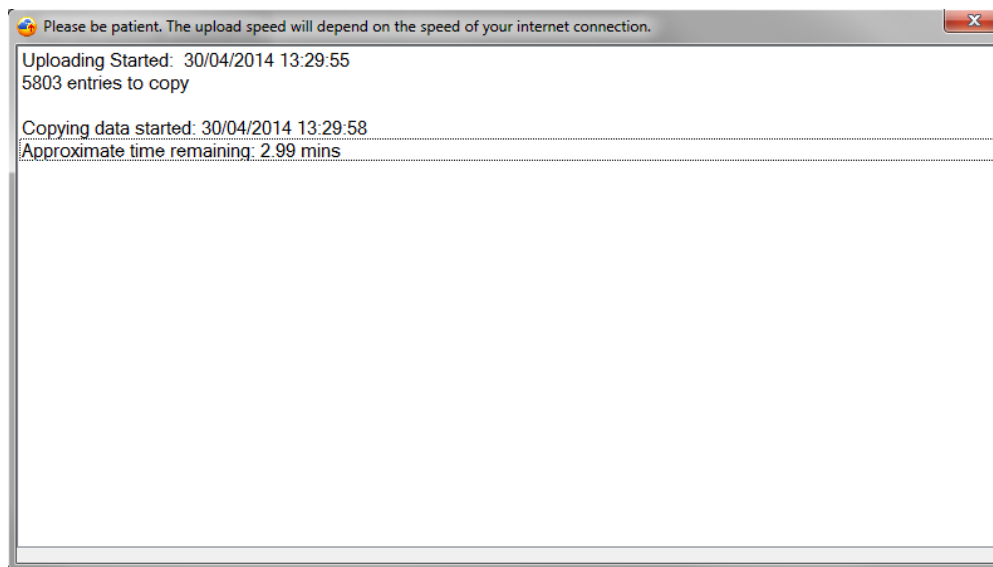
- Once the uploading is finished an 'Uploading Completed' message will be displayed. This can take some time depending on how many discounts you have setup and your internet connection speed.
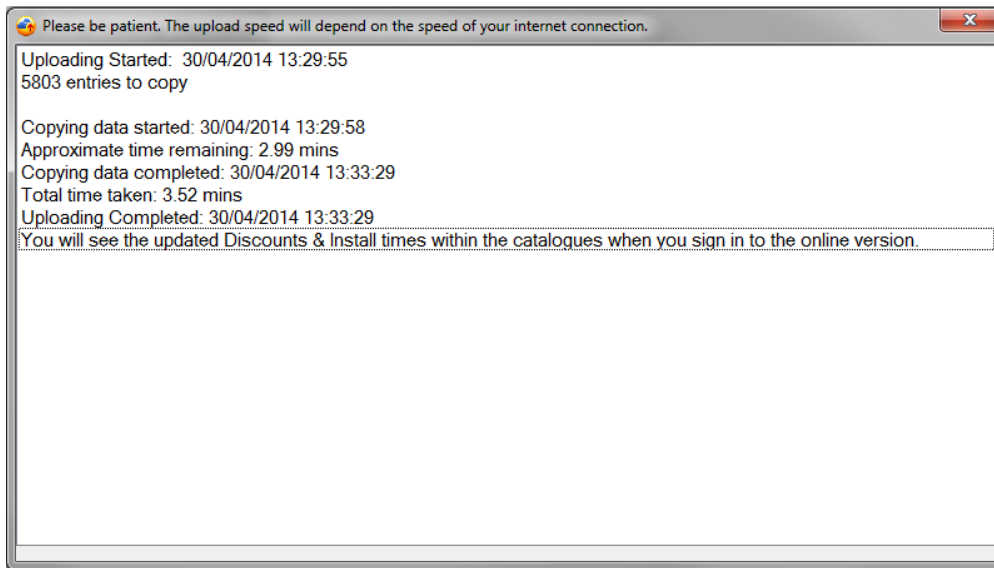
- To upload the external discounts that you setup under the 'Tools >> Discounts' tab on *Electrika Desktop* click 'Upload External Discounts' to browse for the '.DIS' file.
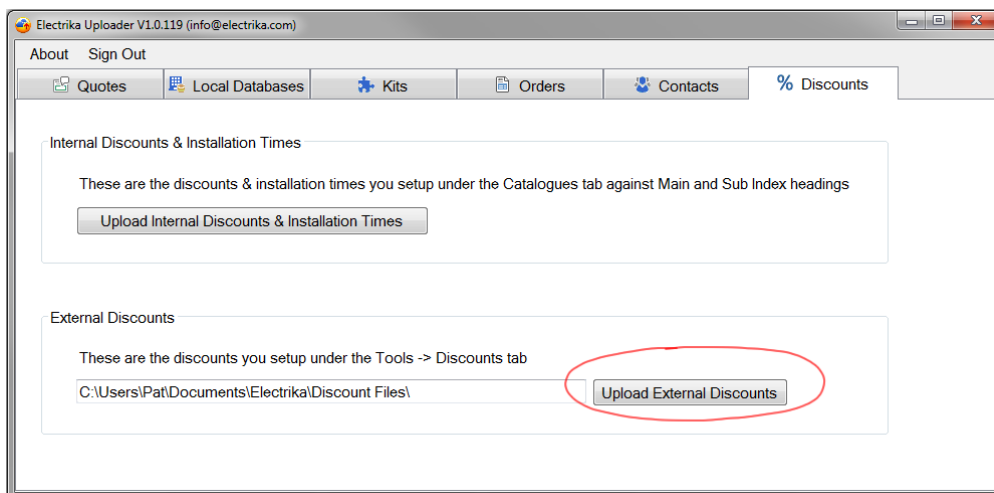
Managing different currencies

For the benefit of our international users, we have included the ability to use Electrika in any desired currency.

If you would like to use any currency other than GBP you would first need to setup your preferred currency.

In the following links you'll find all the information you need to know in regards to currencies.

- Setting up your currency
- Files with different currencies
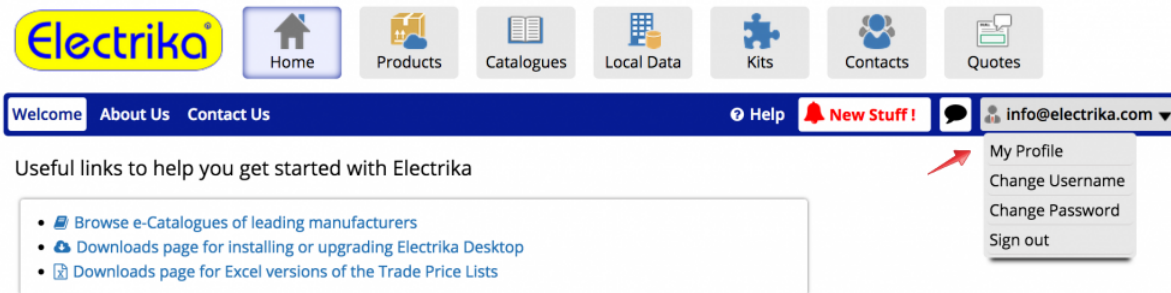- Currency conversion

Setting up your currency

How do I change my currency?

- Click on 'My Profile' under your email sign in.

- This will redirect you to your profile page where you change the currency.

Files with different currencies

How do I add files of different currencies?

- Change to the currency of your choice.
- Start a new file.

Currency conversion

If you have set up a currency other than GBP you might want to add parts with trade prices converted to your currency value.

- Create a file with currency other than GBP
- Now add parts to the parts list.
- If your default currency is something other than GBP, a dialog will appear where you can enter the conversion rate for your currency from GBP.
- If you are not sure about the conversion rate a link to xe.com is provided.

Convert to your currency

1.00 GBP = 1.48 USD

Click here to find the latest conversion rates

Copy