

Electrika **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.








The screenshot displays the Electrika software interface. At the top, there is a navigation bar with icons for Home, Products, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a teal header bar with tabs for Quotes, Orders, Invoices, and Search Quotes. A yellow breadcrumb trail reads 'General >> Complete house repairs >> Bob Boberts'. Below the breadcrumb is a row of tabs: Files, Project, Settings, Sections, Active, Costing, Summary, and Reports. The 'Files' tab is active, showing a file explorer on the left with a tree view containing 'All Files (7)', 'My Files', 'General (6)', 'Recycle Bin (2)', and 'Shared folders from other users'. The 'General (6)' folder is selected. On the right, a toolbar contains buttons for 'New Quote', 'Copy', 'Move', 'Export', 'Delete', 'Create Orders', and 'Create Invoice'. A red arrow points to the 'New Quote' button. Below the toolbar is a search bar with 'Project Name' and 'Type in search terms' fields, and 'From' and 'To' date pickers. Below the search bar is a pagination bar showing 'Page 1 / 1' and '6 Files'. The main content area displays a file card for 'Complete house repairs' by 'Electrika Ltd'. The card includes a checkbox, an information icon, the project name 'Complete house repairs', the client name 'Bob Boberts', the address 'MK Lamps (S3) - Unit 202 Milton Keynes Bus Centre', the last modified date '08-Apr-2015 13:36:28', the price '£571,249.07', the due date '26-Oct-2008 00:00:00', and buttons for 'Add Note' and 'To Follow Up'.

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 .



 Home
  Products
  Catalogues
  Local Data
  Kits
  Contacts
  Quotes

Quotes Orders Invoices Search Quotes



General >> QUO-PVS-15-00017-A >> Example Electrika Quotation

Files Project Settings Sections Active Costing Summary Reports


General

File Name: Example file name

Quote Ref: QUO-PVS-15-00017-A Cust Ref: CR345 Estimator: John Smith


Project: Example Electrika Quotation  







Note: Fixed price

Status:  Quotation Delivery Period: 2-3 Days Tender Sell: £30,220.26


Created: 20-Jun-2014 Received: 20-Jun-2014 Due: 21-Jul-2014 Valid To: 21-Jun-2014

Companies linked with this project

Search Company Name, Address1, Post Code or Telephone Search  New Company

	Folder	Company Name	Address	Tel
	General	ABC Engineering	463 Burton Road	0161 424 3636
	General	Manchester High School	PO Box 129	0161 945 5124
	Suppliers	AC Electrical Wholesale Plc	Unit 1	0161 209 2093
	Suppliers	Bennett & Fountain Ltd		
	Suppliers	City Electrical Factors		
	Suppliers	Edmundson Electrical Ltd		

Attachments

 Browse for files

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.

The screenshot shows the Electrika software interface. At the top is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a 'Quotes' section with a 'Search Quotes' button. The main area displays a quote form for 'QUO-ELD-14-00014-A' with the project name 'Replace main distribution board'. The form includes fields for Quote Ref, Cust Ref, Estimator, Project, Note, Status, Delivery Period, Tender Sell, and dates for Created, Received, Due, and Valid To. Below the form is a section titled 'Companies linked with this project' which contains a search bar and a table of companies. The table has columns for Company Name, Address, Post Code, Telephone, and Email. The companies listed are ABC Engineering, M20 SBX, and 15 Eleanor Road. Below the table are buttons for 'Suppliers', 'AC Electrical Wholesale Plc', and 'ADDD1'. At the bottom of the form are sections for 'Attachments' (with a 'Browse for files' button), 'Internal Notes', and 'Customer Notes'.

Electrika Home Software Catalogues Local Data Kits Contacts Quotes

Quotes Search Quotes

General >> QUO-ELD-14-00014-A >> Replace main distribution board

Files Project Items Active Costing Summary Reports

General

Quote Ref: QUO-ELD-14-00014-A Cust Ref: CR1223 Estimator: Electrika Ltd

Project: Replace main distribution board

Note: Fixed price

Status: Quotation Delivery Period: 2-3 Days Tender Sell: £0.00

Created: 13-Jun-2014 Received: 13-Jun-2014 Due: 13-Jun-2014 Valid To: 13-Jul-2014

Companies linked with this project

abc Search New Company

ABC Engineering	ess	Tel
463 Burton Road	Burton Road	0161 424 3636
M20 SBX	15 Eleanor Road	01992 711616
0161 424 3636		

Suppliers AC Electrical Wholesale Plc ADDD1 012323232

Attachments

Browse for files


Internal Notes

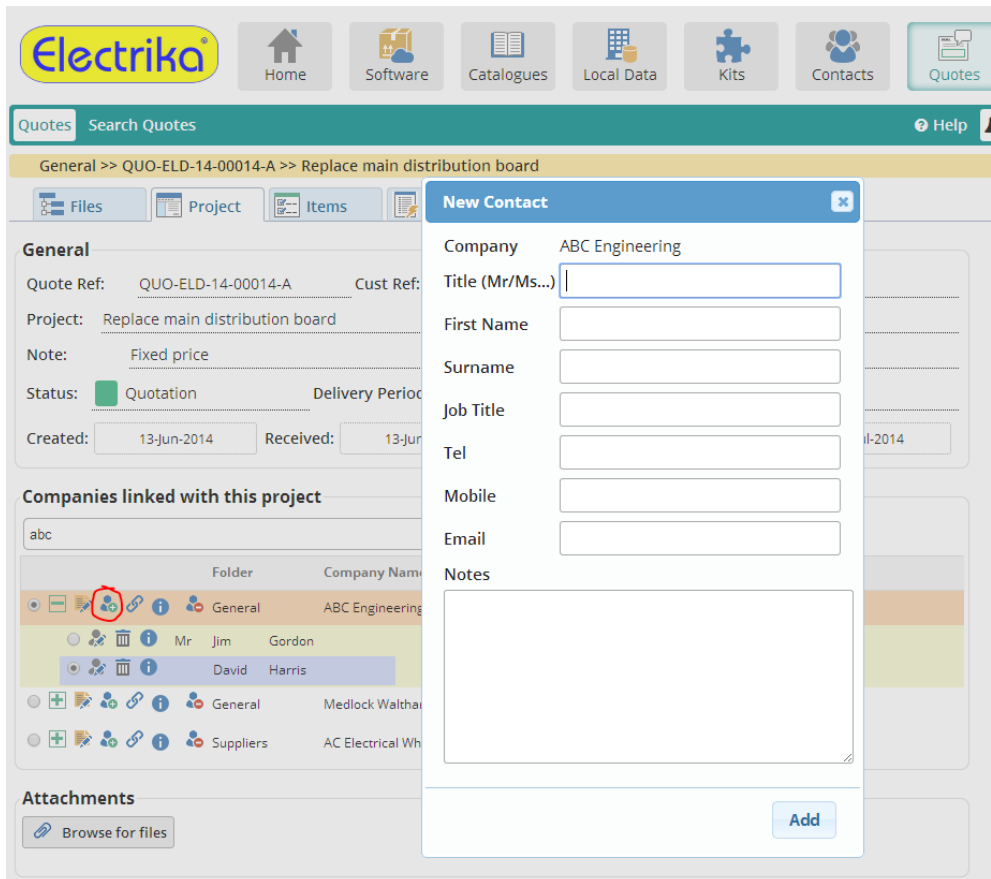
Customer Notes

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  .



The screenshot displays the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar labeled 'Quotes' and a 'Help' button. The main area shows a project titled 'General >> QUO-ELD-14-00014-A >> Replace main distribution board'. A 'New Contact' dialog box is open, allowing the user to add a new contact to the project. The dialog box contains the following fields:

- Company: ABC Engineering
- Title (Mr/Ms...):
- First Name:
- Surname:
- Job Title:
- Tel:
- Mobile:
- Email:
- Notes:


At the bottom of the dialog box is an 'Add' button. In the background, the 'Companies linked with this project' section is visible, showing a list of companies with a red circle highlighting the 'Add' button next to 'ABC Engineering'.








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.



 Home
  Software
  Catalogues
  Local Data
  Kits
  Contacts
  Quotes

Quotes

Search Quotes

Help

General >> QUO-ELD-14-00014-A >> Replace main distribution board

Files

Project

Items

Active

Costing

Summary

Reports

General

Quote Ref: QUO-ELD-14-00014-A Cust Ref: CR1223 Estimator: Electrika Ltd

Project: Replace main distribution board

Note: Fixed price

Status: ☒ Quotation Delivery Period: 2-3 Days Tender Sell: £0.00

Created: 13-Jun-2014 Received: 13-Jun-2014 Due: 13-Jun-2014 Valid To: 13-Jul-2014

Companies linked with this project

Folder	Company Name	Address	Tel
General	ABC Engineering	463 Burton Road	0161 424 3636
General	Medlock Waltham X	109-115 Eleanor Road	01992 711616
Suppliers	AC Electrical Wholesale Plc	ADDD1	012323232

Attachments


conduit for data and voice services 17-apr-2014 09-23-53.xlsx








notes.txt

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.



 Home
  Software
  Catalogues
  Local Data
  Kits
  Contacts
  Quotes

Quotes

Search Quotes

General >> QUO-ELD-14-00014-A >> Replace main distribution board

Files

Project

Items

Active

Costing

Summary

Reports

General

Quote Ref:

QUO-ELD-14-00014-A

Cust Ref:

CR1223

Estimator:

Electrika Ltd

Project:

Replace main distribution board

Note:

Fixed price

Status:

☒ Quotation

Delivery Period:

2-3 Days

Tender Sell:

£0.00

Created:

13-Jun-2014

Received:

13-Jun-2014

Due:

13-Jun-2014

Valid To:

13-Jul-2014

Companies linked with this project

Search Company Name, Address1, Post Code or Telephone

Search

New Company

Folder	Company Name	Address	Tel
General	ABC Engineering	463 Burton Road	0161 424 3636
General	Medlock Waltham X	109-115 Eleanor Road	01992 711616
Suppliers	AC Electrical Wholesale Plc	ADDD1	012323232

Attachments

Browse for files

conduit for data and voice services 17-apr-2014 09-23-53.xlsx

×

notes.txt

×

Internal Notes

Quotation produced from takeoff drawings.

Specific manufacturers were requested.

Customer Notes

This quotation is based on our interpretation of requirements from information received, which is specific to the attached quotation reference only. It is therefore your responsibility to check all details on this quotation to ensure it meets with your requirements.

Receipt of an official order will be accepted as confirmation that this quotation is correct.

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.

The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar labeled 'Quotes' and 'Search Quotes'. The main header indicates the project status: 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. Below the header, there are tabs for Files, Project, Items, Active, Costing, Summary, and Reports. The 'Items' tab is selected, showing a list of project sections. The interface includes buttons for Edit (New, Copy, Delete), Distribute, Move (Up, Down), and Views (Material Cost). The table below lists the sections with their quantities, material costs, and total costs.

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 screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar labeled 'Quotes' and 'Search Quotes'. A yellow banner indicates the current project: 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. Below the banner are tabs for Files, Project, Items, Active, Costing, Summary, and Reports. The 'Active' tab is selected. On the left, there are buttons for Edit (New, Copy, Delete), Distribute, Move (Up, Down), and Views (Material Cost). The main area displays a table of items with columns: Item, Quantity, Mat Trade, Discount%, Mat Cost, Total Mat, and Optional?. The table lists seven items, with the first item 'A) SUB-MAIN & DISTRIBUTION' highlighted in blue and marked as 'Active'. The second item 'B) LIGHTING AND EMERGENCY LIGHTING' is marked as 'Open' and circled in red. The table also shows a total of 23.006 for Mat Trade and £6,707.19 for Total Mat.

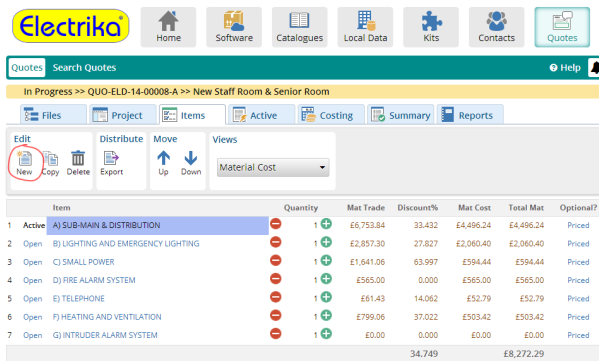
Item	Quantity	Mat Trade	Discount%	Mat Cost	Total Mat	Optional?
1 Active A) SUB-MAIN & DISTRIBUTION	1	£2,661.85	9.331	£2,413.56	£2,413.56	Priced
2 Open B) LIGHTING AND EMERGENCY LIGHTING	1	£2,857.30	27.827	£2,060.40	£2,060.40	Priced
3 Open C) SMALL POWER	1	£1,766.64	37.157	£1,112.02	£1,112.02	Priced
4 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	

- 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

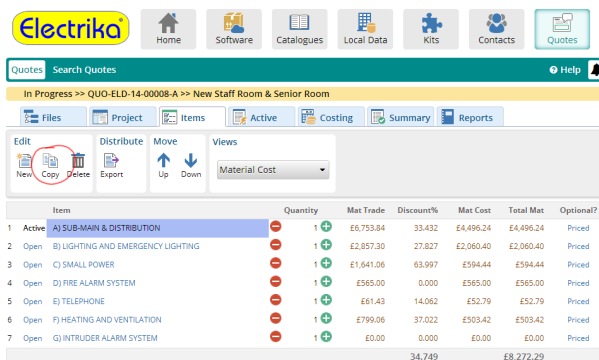
How do I add a new Section?

- 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.

Electrika

HomeSoftwareCataloguesLocal DataKitsContactsQuotes

QuotesSearch QuotesHelp

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

FilesProjectItemsActiveCostingSummaryReports

EditNewCopyDeleteDistributeExportMoveUpDownViewsMaterial Cost

	Item	Quantity	Mat Trade	Discount%	Mat Cost	Total Mat	Optional?
1	Active A) SUB-MAIN & DISTRIBUTION	1	£6,753.84	33.432	£4,496.24	£4,496.24	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	£1,641.06	63.997	£594.44	£594.44	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
			34,749		£8,272.29		

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.

Item	Quantity	Mat Trade	Discount%	Mat Cost	Total Mat	Optional?
1 Active A) SUB-MAIN & DISTRIBUTION	1	£6,753.84	33.432	£4,496.24	£4,496.24	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	£1,641.06	63.997	£594.44	£594.44	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
		34,749		£8,272.29		

- 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.

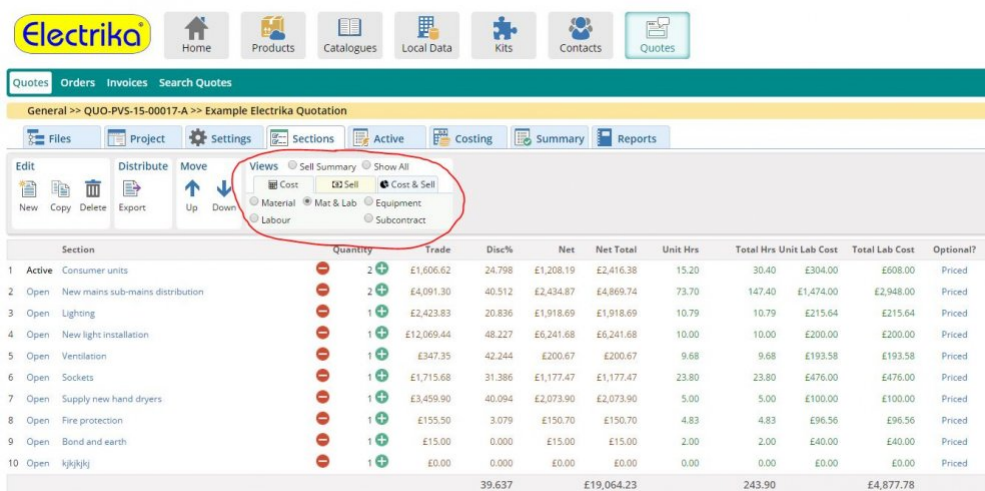
Item	Quantity	Mat Trade	Discount%	Mat Cost	Total Mat	Optional?
1 Active A) SUB-MAIN & DISTRIBUTION	1	£6,753.84	33.432	£4,496.24	£4,496.24	Priced
2 Open B) LIGHTING AND EMERGENCY LIGHTING	1	£2,857.30	27.827	£2,060.40	£2,060.40	Priced
3 Open 004 EXTRACT VENT KITCHENS	1	£641.06	63.997	£594.44	£594.44	Priced
4 Open 02 LV SWITCHGEAR AND SECTION DB'S	1	£565.00	0.000	£565.00	£565.00	Priced
5 Open 04 Interior Light Fittings	1	£61.43	14.062	£52.79	£52.79	Priced
6 Open 06 INTERIOR LIGHT FITTINGS	1	£799.06	37.022	£503.42	£503.42	Priced
7 Open 08 EXTERIOR LIGHT FITTINGS	1	£0.00	0.000	£0.00	£0.00	Priced
		34,749		£8,272.29		

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





The screenshot shows the Electrika software interface. The top navigation bar includes icons for Home, Products, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a tabbed interface with 'Quotes' selected. The main area displays a 'General >> QUO-PVS-15-00017-A >> Example Elektra Quotation' window. The 'Views' panel is highlighted with a red circle, showing three radio buttons: 'Cost', 'Cost & Sell', and 'Cost & Sell'. The 'Cost & Sell' view is selected. Below the Views panel is a table with columns: Section, Quantity, Trade, Disc%, Net, Net Total, Unit Hrs, Total Hrs, Unit Lab Cost, Total Lab Cost, and Optional?.

Section	Quantity	Trade	Disc%	Net	Net Total	Unit Hrs	Total Hrs	Unit Lab Cost	Total Lab Cost	Optional?	
1 Active Consumer units	2	+	£1,606.62	24.798	£1,208.19	£2,416.38	15.20	30.40	£304.00	£608.00	Priced
2 Open New mains sub-mains distribution	2	+	£4,091.30	40.512	£2,434.87	£4,869.74	73.70	147.40	£1,474.00	£2,948.00	Priced
3 Open Lighting	1	+	£2,423.83	20.836	£1,918.69	£1,918.69	10.79	10.79	£215.64	£215.64	Priced
4 Open New light installation	1	+	£12,069.44	48.227	£6,241.68	£6,241.68	10.00	10.00	£200.00	£200.00	Priced
5 Open Ventilation	1	+	£347.35	42.244	£200.67	£200.67	9.68	9.68	£193.58	£193.58	Priced
6 Open Sockets	1	+	£1,715.68	31.386	£1,177.47	£1,177.47	23.80	23.80	£476.00	£476.00	Priced
7 Open Supply new hand dryers	1	+	£3,459.90	40.094	£2,073.90	£2,073.90	5.00	5.00	£100.00	£100.00	Priced
8 Open Fire protection	1	+	£155.50	3.079	£150.70	£150.70	4.83	4.83	£96.56	£96.56	Priced
9 Open Bond and earth	1	+	£15.00	0.000	£15.00	£15.00	2.00	2.00	£40.00	£40.00	Priced
10 Open kjlkjklj	1	+	£0.00	0.000	£0.00	£0.00	0.00	0.00	£0.00	£0.00	Priced
			39.637		£19,064.23		243.90		£4,877.78		

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.

Home

Software

Catalogues

Local Data

Kits

Contacts

Quotes

Quotes

Search Quotes

Help

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

Files

Project

Items

Active

Costing

Summary

Reports

Edit

New

Copy

Delete

Distribute

Export

Move

Up

Down

Views

Material Cost

	Item	Quantity	Mat Trade	Discount%	Mat Cost	Total Mat	Optional
1	Active A) SUB-MAIN & DISTRIBUTION	1	£6,753.84	33.432	£4,496.24	£4,496.24	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	£1,641.06	63.997	£594.44	£594.44	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
				34.749		£8,272.29	

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'.

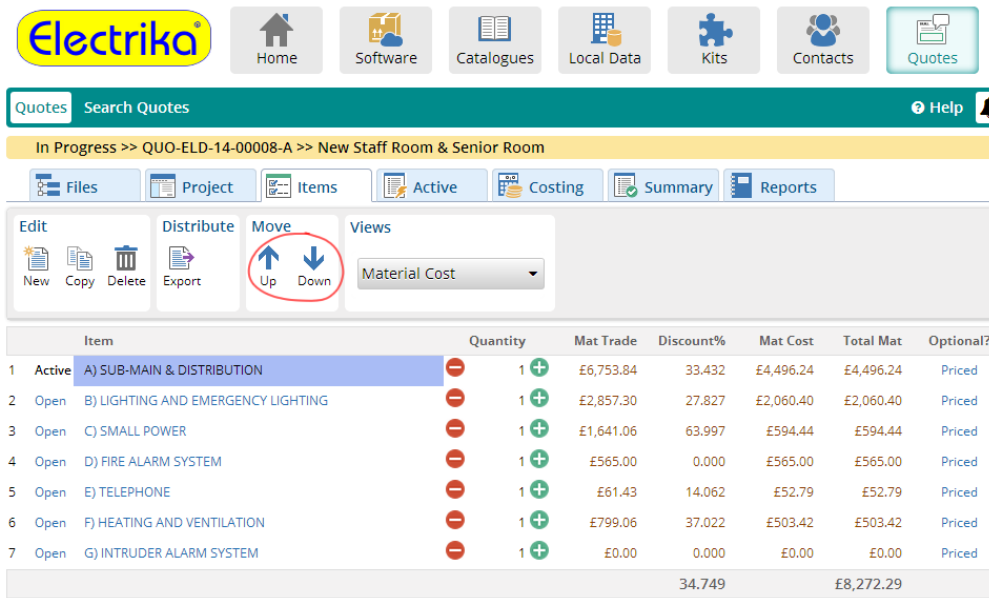
The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar labeled 'Quotes' and a 'Help' button. The main header indicates the current project: 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. Below the header, there are tabs for Files, Project, Items, Active, Costing, Summary, and Reports. The 'Items' tab is selected, showing a list of project items. The list has columns for Item, Quantity, Mat Trade, Discount%, Mat Cost, Total Mat, and Optional?. The 'Optional?' column contains links that toggle between 'Priced' and 'Optional'. The items listed are:

Item	Quantity	Mat Trade	Discount%	Mat Cost	Total Mat	Optional?
1 Active A) SUB-MAIN & DISTRIBUTION	1	£6,753.84	33.432	£4,496.24	£4,496.24	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	£1,641.06	63.997	£594.44	£594.44	Optional
4 Open D) FIRE ALARM SYSTEM	1	£565.00	0.000	£565.00	£565.00	Optional
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
			32.075		£7,112.85	

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.



The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar labeled 'Quotes' and a 'Search Quotes' button. A status bar indicates 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. Below the status bar are tabs for Files, Project, Items, Active, Costing, Summary, and Reports. The 'Items' tab is selected, and the 'Move' button is circled in red. The 'Move' button has 'Up' and 'Down' arrows. Below the 'Move' button is a 'Views' dropdown menu set to 'Material Cost'. Below the 'Views' dropdown is a table with 8 columns: Item, Quantity, Mat Trade, Discount%, Mat Cost, Total Mat, and Optional?. The table contains 7 rows of data, with the first row highlighted in blue. The 'Up' and 'Down' buttons are circled in red.

Item	Quantity	Mat Trade	Discount%	Mat Cost	Total Mat	Optional?
1 Active A) SUB-MAIN & DISTRIBUTION	1	£6,753.84	33.432	£4,496.24	£4,496.24	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	£1,641.06	63.997	£594.44	£594.44	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
			34.749		£8,272.29	

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 catalogues?

- 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.

The screenshot shows the Electrika e-Catalogues interface. The top navigation bar includes Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar with the text 'Search Cat Number Or Description' and a search button. To the right of the search bar are three buttons: 'Add To Local', 'Add To Kit', and 'Add To Quote', which are highlighted with a red circle. Below the search bar is a dropdown menu for 'Using discounts and install times from:' set to 'info@electrika.com'. Below this is a 'Share Install Times & Discounts' button. The main content area shows a list of parts with columns: Cat Number, Description, Pack, Unit, Trade, Disc%, Net, and Hours. The parts are listed in a table with a 'Catalogue Page' link for each item.

Cat Number	Description	Pack	Unit	Trade	Disc%	Net	Hours
360BK	xCL CLASSIC DP FOOT OP SW BK	5	EACH	£49.67	0.00	£49.67	0.000
360WE	CL CLASSIC DP FOOT OP SW WH	5	EACH	£43.37	0.00	£43.37	0.000
363BR	CL CLAS 10A 2W SURFACE SW BRN	1	EACH	£29.30	0.00	£29.30	0.000
363WE	CL CLAS 10A 2W SURFACE SW BRN	1	EACH	£29.30	0.00	£29.30	0.000
E192030BK	XTRADITIONAL 10A 1G 2W BK BASE	1	EACH	£77.00	0.00	£77.00	0.000
E192030WE	TRADITIONAL 10A 1G 2W WH BASE	1	EACH	£77.00	0.00	£77.00	0.000
E192030MBK	xCL CLASSIC 10A 1G INT BK BASE	1	EACH	£91.27	0.00	£91.27	0.000

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

The screenshot shows the Electrika Quotes interface. The top navigation bar includes Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar with the text 'Search Quotes' and a search button. To the right of the search bar are three buttons: 'Add To Local', 'Add To Kit', and 'Add To Quote', which are highlighted with a red circle. Below the search bar is a dropdown menu for 'Using discounts and install times from:' set to 'info@electrika.com'. Below this is a 'Share Install Times & Discounts' button. The main content area shows a list of parts with columns: Source, Manuf, Cat Number, Description, Unit, Qty, Trade, Supplier, Disc%, Net, and Total. The parts are listed in a table with a 'Catalogue Page' link for each item.

Source	Manuf	Cat Number	Description	Unit	Qty	Trade	Supplier	Disc%	Net	Total
Catalogue	MK	2949 WHI	13A 2GANG SWITCHSOCKET	EACH	8	£12.63		40.000	£7.58	£60.64
Catalogue	MK	K932 ALM	13A DP SW. CONN UNIT/FLEX OUT	EACH	4	£9.99		30.000	£6.99	£27.96
Local	MISC		STRIP OUT AND SET UP	LOT	2	£5.28		40.000	£3.17	£6.34
Special	MISC		20MM GALV CONDUIT	M	90	£2.75		0.000	£2.75	£247.50
Catalogue	DRAKA UK	6491BS/2.5RED	2.5 (7/0.67) RED	M	900	£1.38		80.000	£0.28	£252.00
Catalogue	SCHN ESER	360WE	CL CLASSIC DP FOOT OP SW WH	EACH	1	£43.37		0.000	£43.37	£43.37
Catalogue	SCHN ESER	363BR	CL CLAS 10A 2W SURFACE SW BRN	EACH	1	£29.30		0.000	£29.30	£29.30
Catalogue	SCHN ESER	363WE	CL CLAS 10A 2W SURFACE SW BRN	EACH	1	£29.30		0.000	£29.30	£29.30

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.

The screenshot shows the Electrika software interface. At the top, there's a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a header bar with 'Quotes' and 'Search Quotes' buttons, along with a help icon and a user profile icon. The main area displays a project titled 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. A toolbar with various icons (Cut, Copy, Paste, Delete, Clipboard, Kits, Insert, Export, Views) is visible. Below the toolbar, there's a table with columns: Source, Manuf, Cat Number, Description, Unit, Qty, Trade Supplier, Disc%, Net, and Total. The table lists several parts, including '13A 2GANG SWITCHSOCKET', '13A DP SW. CONN UNIT/FLEX OUT', 'STRIP OUT AND SET UP', '20MM GALV CONDUIT', '2.5 (7/0.67) RED', 'CL CLASSIC DP FOOT OP SW WH', 'CL CLAS 10A 2W SURFACE SW BRN', and 'CL CLAS 10A 2W SURFACE SW BRN'. The 'Cat Number Search' edit box is highlighted with a red circle, and the 'Search' button is also visible.


- 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.

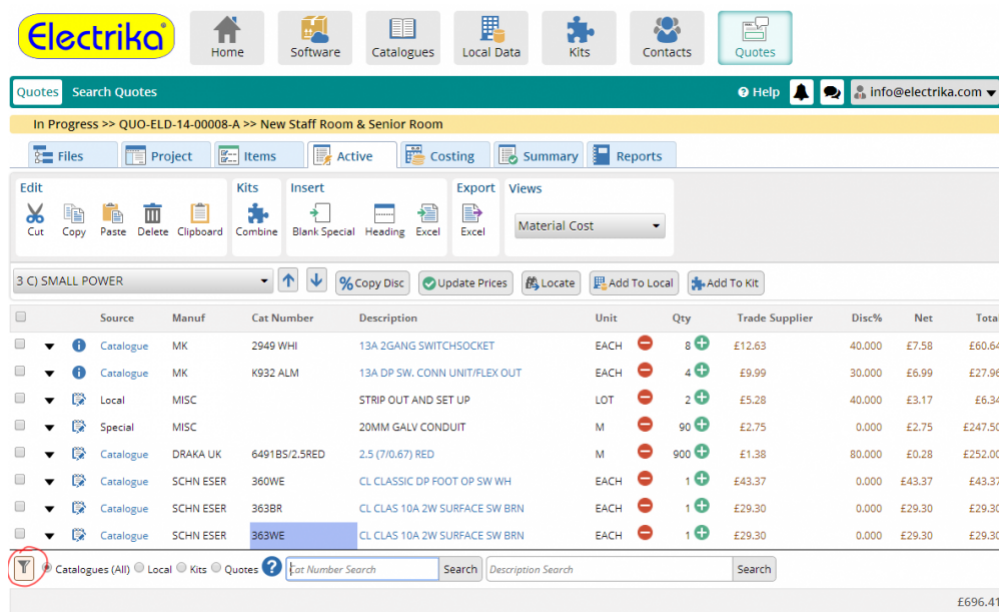
The screenshot shows the same Electrika software interface as the previous one. The 'Cat Number Search' edit box now contains the text 'k23', and a dropdown list of suggested parts is visible below it. The suggestions include: 'K23471 CHAB >> MK', 'K23476BSSW >> MK', 'K23473 CHAB >> MK', 'K23476POCW >> MK', 'K23476WHIW >> MK', 'K23476PBRW >> MK', 'K23476BSSB >> MK', and 'K23476POCB >> MK'. The 'Search' button is also visible.

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.



The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar labeled 'Search Quotes' and a user profile dropdown. The main area displays a list of items under the 'Catalogues' tab. The list has columns for Source, Manuf, Cat Number, Description, Unit, Qty, Trade Supplier, Disc%, Net, and Total. The item '363WE' is highlighted. At the bottom left, there is a filter icon (a funnel) circled in red, next to the text 'Catalogues (All)'. Below this are search filters for 'Cat Number Search' and 'Description Search'.

Source	Manuf	Cat Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
Catalogue	MK	2949 WHI	13A 2GANG SWITCHSOCKET	EACH	8	£12.63	40.000	£7.58	£60.64
Catalogue	MK	K932 ALM	13A DP SW. CONN UNIT/FLEX OUT	EACH	4	£9.99	30.000	£6.99	£27.96
Local	MISC		STRIP OUT AND SET UP	LOT	2	£5.28	40.000	£3.17	£6.34
Special	MISC		20MM GALV CONDUIT	M	90	£2.75	0.000	£2.75	£247.50
Catalogue	DRAKA UK	6491BS/2.5RED	2.5 (7/0.67) RED	M	900	£1.38	80.000	£0.28	£252.00
Catalogue	SCHN ESER	360WE	CL CLASSIC DP FOOT OP SW WH	EACH	1	£43.37	0.000	£43.37	£43.37
Catalogue	SCHN ESER	363BR	CL CLAS 10A 2W SURFACE SW BRN	EACH	1	£29.30	0.000	£29.30	£29.30
Catalogue	SCHN ESER	363WE	CL CLAS 10A 2W SURFACE SW BRN	EACH	1	£29.30	0.000	£29.30	£29.30

Filter: Catalogues (All) Local Kits Quotes

Search: Cat Number Search Description Search

£696.41

Select the manufacturers you would like to include in the search

☒ Select / Unselect All

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

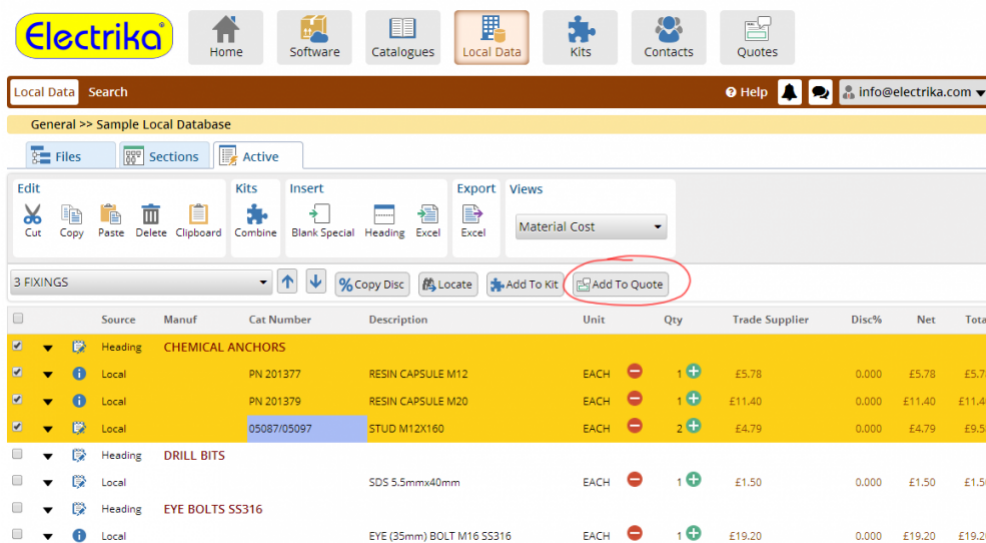
Apply

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.



The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar and a user profile dropdown. The main area is titled 'General >> Sample Local Database'. On the left, there are tabs for Files, Sections, and Active. The 'Active' tab is selected, showing a list of parts. The 'Add To Quote' button is highlighted with a red circle. Below the button, there is a table of parts.

	Source	Manuf	Cat Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
✓	Heading			CHEMICAL ANCHORS						
✓	Local		PN 201377	RESIN CAPSULE M12	EACH	1	£5.78	0.000	£5.78	£5.78
✓	Local		PN 201379	RESIN CAPSULE M20	EACH	1	£11.40	0.000	£11.40	£11.40
✓	Local		05087/05097	STUD M12X160	EACH	2	£4.79	0.000	£4.79	£9.58
✓	Heading			DRILL BITS						
✓	Local			SDS 5.5mmx40mm	EACH	1	£1.50	0.000	£1.50	£1.50
✓	Heading			EYE BOLTS SS316						
✓	Local			EYE (35mm) BOLT M16 SS316	EACH	1	£19.20	0.000	£19.20	£19.20

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

Home

Software

Catalogues

Local Data

Kits

Contacts

Quotes

Quotes

Search Quotes

Help

info@electrika.com

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

Files

Project

Items

Active

Costing

Summary

Reports

Edit

Cut

Copy

Paste

Delete

Clipboard

Kits

Combine

Insert

Blank Special

Heading

Excel

Export

Excel

Views

Material Cost

3 C) SMALL POWER

% Copy Disc

Update Prices

Locate

Add To Local

Add To Kit

	Source	Manuf	Cat Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
	Catalogue	MK	2949 WHI	13A 2GANG SWITCHSOCKET	EACH	8	£12.63	40.000	£7.58	£60.64
	Catalogue	MK	K932 ALM	13A DP SW. CONN UNIT/FLEX OUT	EACH	4	£9.99	30.000	£6.99	£27.96
	Local	MISC		STRIP OUT AND SET UP	LOT	2	£5.28	40.000	£3.17	£6.34
	Special	MISC		20MM GALV CONDUIT	M	90	£2.75	0.000	£2.75	£247.50
	Catalogue	DRAKA UK	6491BS/2.5RED	2.5 (7/0.67) RED	M	900	£1.38	80.000	£0.28	£252.00
	Catalogue	SCHN ESER	360WE	CL CLASSIC DP FOOT OP SW WH	EACH	1	£43.37	0.000	£43.37	£43.37
	Catalogue	SCHN ESER	363BR	CL CLAS 10A 2W SURFACE SW BRN	EACH	1	£29.30	0.000	£29.30	£29.30
	Catalogue	SCHN ESER	363WE	CL CLAS 10A 2W SURFACE SW BRN	EACH	1	£29.30	0.000	£29.30	£29.30
	Heading		CHEMICAL ANCHORS							
	Local			RESIN CAPSULE M12		0	£0.00	0.000	£0.00	£0.00
	Local			RESIN CAPSULE M20		0	£0.00	0.000	£0.00	£0.00
	Local			STUD M12X160		0	£0.00	0.000	£0.00	£0.00

Catalogues (All)

Local

Kits

Quotes

?

Cat Number Search

Search

Description Search

Search

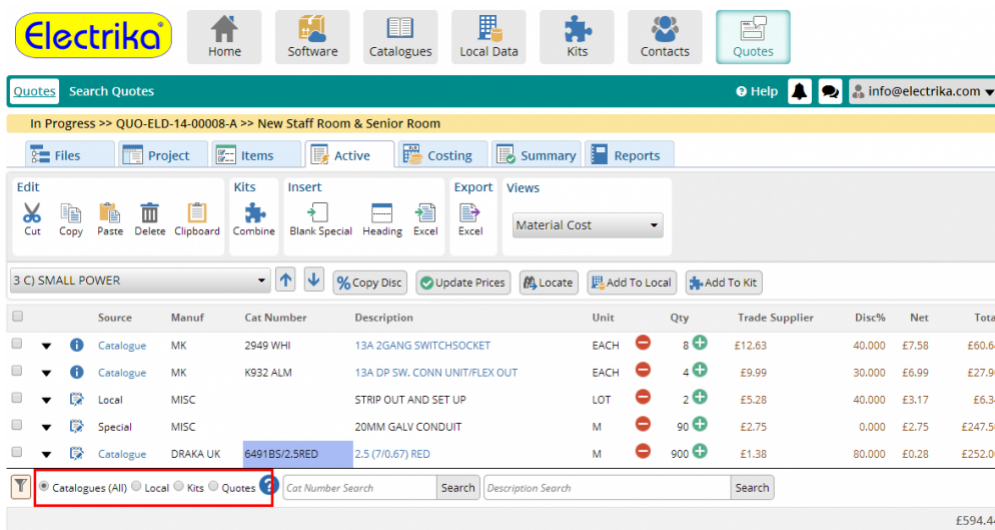
£696.41

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?

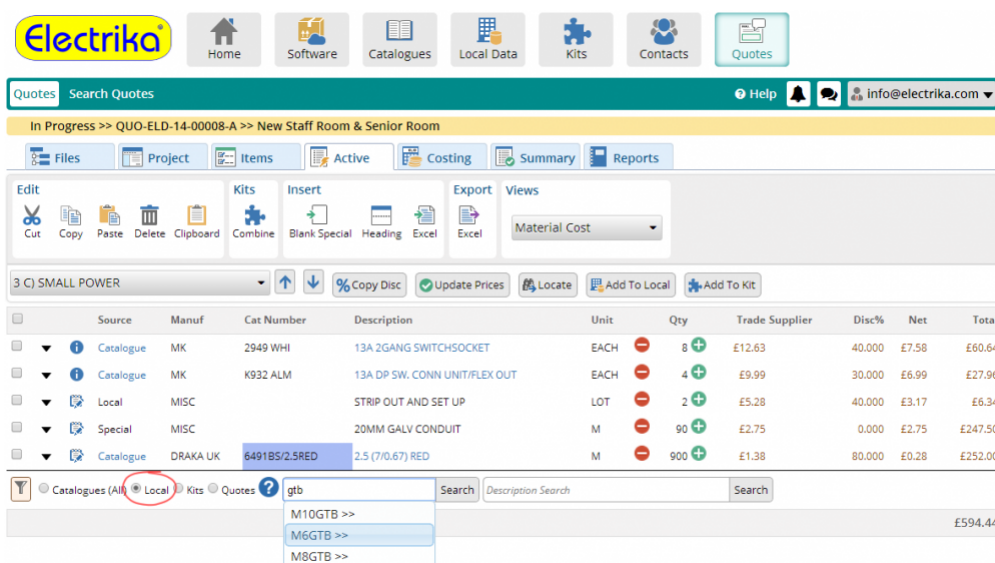
- Select the tool type that you wish to get the search suggestion from.



The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar labeled 'Search Quotes'. The main area displays a table of parts with columns: Source, Manuf, Cat Number, Description, Unit, Qty, Trade Supplier, Disc%, Net, and Total. The table lists several items, including '13A 2GANG SWITCHSOCKET', '13A DP SW. CONN UNIT/FLEX OUT', 'STRIP OUT AND SET UP', '20MM GALV CONDUIT', and '2.5 (7/0.67) RED'. The 'Local' search option is highlighted in the bottom search bar.

Source	Manuf	Cat Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
Catalogue	MK	2949 WHI	13A 2GANG SWITCHSOCKET	EACH	8	£12.63	40.00%	£7.58	£60.64
Catalogue	MK	K932 ALM	13A DP SW. CONN UNIT/FLEX OUT	EACH	4	£9.99	30.00%	£6.99	£27.96
Local	MISC		STRIP OUT AND SET UP	LOT	2	£5.28	40.00%	£3.17	£6.34
Special	MISC		20MM GALV CONDUIT	M	90	£2.75	0.00%	£2.75	£247.50
Catalogue	DRAKA UK	6491BS/2.5RED	2.5 (7/0.67) RED	M	900	£1.38	80.00%	£0.28	£252.00

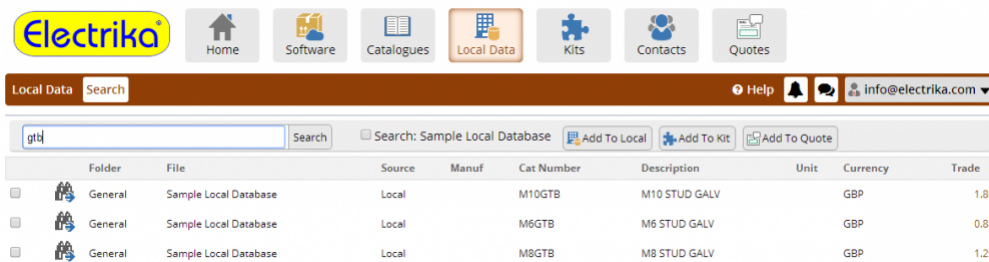
- For example if you select Local and start typing a part number in the 'Cat Number' search, you will get suggestions from the parts in your local data.



The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar labeled 'Search Quotes'. The main area displays a table of parts with columns: Source, Manuf, Cat Number, Description, Unit, Qty, Trade Supplier, Disc%, Net, and Total. The table lists several items, including '13A 2GANG SWITCHSOCKET', '13A DP SW. CONN UNIT/FLEX OUT', 'STRIP OUT AND SET UP', '20MM GALV CONDUIT', and '2.5 (7/0.67) RED'. The 'Local' search option is highlighted in the bottom search bar, and a dropdown menu shows suggestions for 'gtb'.

Source	Manuf	Cat Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
Catalogue	MK	2949 WHI	13A 2GANG SWITCHSOCKET	EACH	8	£12.63	40.00%	£7.58	£60.64
Catalogue	MK	K932 ALM	13A DP SW. CONN UNIT/FLEX OUT	EACH	4	£9.99	30.00%	£6.99	£27.96
Local	MISC		STRIP OUT AND SET UP	LOT	2	£5.28	40.00%	£3.17	£6.34
Special	MISC		20MM GALV CONDUIT	M	90	£2.75	0.00%	£2.75	£247.50
Catalogue	DRAKA UK	6491BS/2.5RED	2.5 (7/0.67) RED	M	900	£1.38	80.00%	£0.28	£252.00

- 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-Catalogues 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.




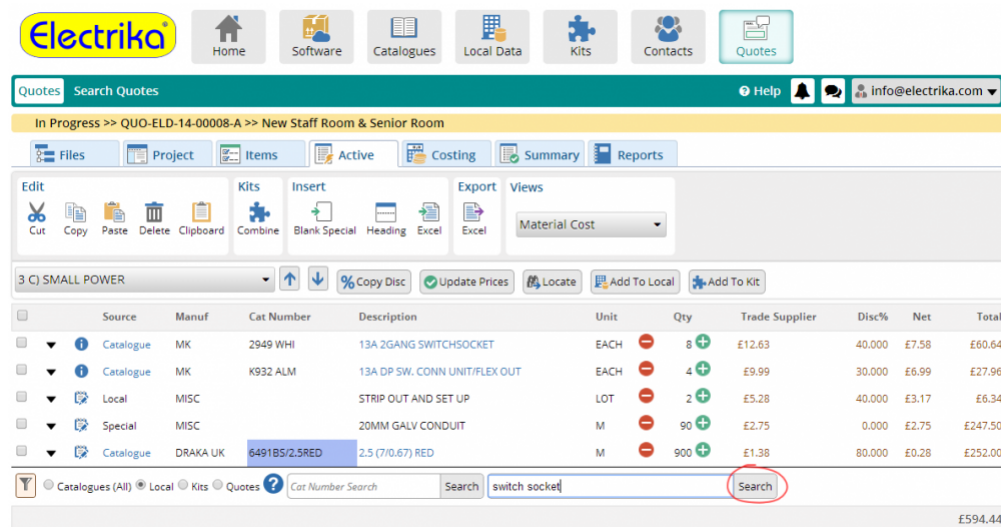
The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data (selected), Kits, Contacts, and Quotes. Below this is a search bar with the text 'gtb' entered. To the right of the search bar are buttons for 'Add To Local', 'Add To Kit', and 'Add To Quote'. Below the search bar is a table with the following columns: Folder, File, Source, Manuf, Cat Number, Description, Unit, Currency, and Trade. The table contains three rows of data, all from the 'General' folder and 'Sample Local Database' file, with sources listed as 'Local'.

Folder	File	Source	Manuf	Cat Number	Description	Unit	Currency	Trade
General	Sample Local Database	Local		M10GTB	M10 STUD GALV		GBP	1.86
General	Sample Local Database	Local		M6GTB	M6 STUD GALV		GBP	0.88
General	Sample Local Database	Local		M8GTB	M8 STUD GALV		GBP	1.29

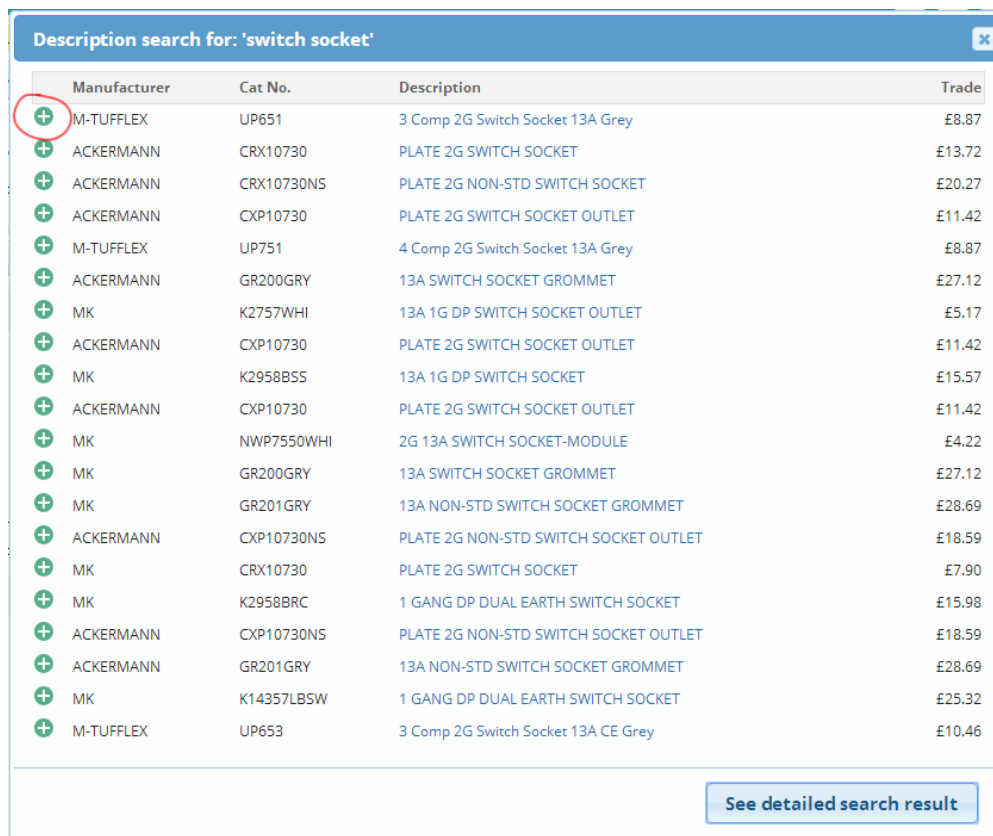
Searching for parts by description

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.



The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar labeled 'Search Quotes' and a user profile dropdown. The main area displays a project titled 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. A toolbar contains various icons for editing, inserting, and exporting. Below the toolbar is a table with columns: Source, Manuf, Cat Number, Description, Unit, Qty, Trade Supplier, Disc%, Net, and Total. The table lists several items, including '13A 2GANG SWITCH SOCKET' and '13A DP SW. CONN UNIT/FLEX OUT'. At the bottom, there is a search bar with the text 'switch socket' and a 'Search' button circled in red.



The screenshot shows a dialog box titled 'Description search for: switch socket'. It contains a table with columns: Manufacturer, Cat No., Description, and Trade. The table lists 20 search results, each with a plus icon in the first column. The first result is 'M-TUFFLEX UP651 3 Comp 2G Switch Socket 13A Grey' with a trade price of £8.87. The last result is 'M-TUFFLEX UP653 3 Comp 2G Switch Socket 13A CE Grey' with a trade price of £10.46. At the bottom right, there is a button labeled 'See detailed search result'.

Manufacturer	Cat No.	Description	Trade
M-TUFFLEX	UP651	3 Comp 2G Switch Socket 13A Grey	£8.87
ACKERMANN	CRX10730	PLATE 2G SWITCH SOCKET	£13.72
ACKERMANN	CRX10730NS	PLATE 2G NON-STD SWITCH SOCKET	£20.27
ACKERMANN	CXP10730	PLATE 2G SWITCH SOCKET OUTLET	£11.42
M-TUFFLEX	UP751	4 Comp 2G Switch Socket 13A Grey	£8.87
ACKERMANN	GR200GRY	13A SWITCH SOCKET GROMMET	£27.12
MK	K2757WHI	13A 1G DP SWITCH SOCKET OUTLET	£5.17
ACKERMANN	CXP10730	PLATE 2G SWITCH SOCKET OUTLET	£11.42
MK	K2958B55	13A 1G DP SWITCH SOCKET	£15.57
ACKERMANN	CXP10730	PLATE 2G SWITCH SOCKET OUTLET	£11.42
MK	NWP7550WHI	2G 13A SWITCH SOCKET-MODULE	£4.22
MK	GR200GRY	13A SWITCH SOCKET GROMMET	£27.12
MK	GR201GRY	13A NON-STD SWITCH SOCKET GROMMET	£28.69
ACKERMANN	CXP10730NS	PLATE 2G NON-STD SWITCH SOCKET OUTLET	£18.59
MK	CRX10730	PLATE 2G SWITCH SOCKET	£7.90
MK	K2958BRC	1 GANG DP DUAL EARTH SWITCH SOCKET	£15.98
ACKERMANN	CXP10730NS	PLATE 2G NON-STD SWITCH SOCKET OUTLET	£18.59
ACKERMANN	GR201GRY	13A NON-STD SWITCH SOCKET GROMMET	£28.69
MK	K14357LBSW	1 GANG DP DUAL EARTH SWITCH SOCKET	£25.32
M-TUFFLEX	UP653	3 Comp 2G Switch Socket 13A CE Grey	£10.46

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.

The screenshot shows the Electrika software interface. The top navigation bar includes the Electrika logo and buttons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar and a status bar indicating 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. The main menu includes Files, Project, Items, Active, Costing, Summary, and Reports. The 'Insert' menu is open, and the 'Blank Special' button is highlighted with a red circle. Below the menu is a toolbar with buttons for Cut, Copy, Paste, Delete, Clipboard, Combine, Blank Special, Heading, Excel, and Export. The main table displays a list of items with columns for Source, Manuf, Cat Number, Description, Unit, Qty, Trade Supplier, Disc%, Net, and Total. The 'Blank Special' button is highlighted in the 'Insert' menu.

- 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.

The screenshot shows the Electrika software interface. The top navigation bar includes the Electrika logo and buttons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar and a status bar indicating 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. The main menu includes Files, Project, Items, Active, Costing, Summary, and Reports. The 'Insert' menu is open, and the 'Blank Special' button is highlighted with a red circle. Below the menu is a toolbar with buttons for Cut, Copy, Paste, Delete, Clipboard, Combine, Blank Special, Heading, Excel, and Export. The main table displays a list of items with columns for Source, Manuf, Cat Number, Description, Unit, Qty, Trade Supplier, Disc%, Net, and Total. The 'Blank Special' dropdown menu is open, showing a search for 'GALVCOND1' and suggesting 'GALVCOND1', 'GALV20', and 'GALV25'. The 'Blank Special' button is highlighted in the 'Insert' menu.

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.

The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar and a status bar. The main area displays a parts list with columns for Source, Manuf, Cat Number, Description, Unit, Qty, Trade Supplier, Disc%, Net, and Total. A red box highlights the 'Heading' button in the 'Insert' menu and the 'SWITCHROOM CONTAINMENT' heading in the parts list.

	Source	Manuf	Cat Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
Heading	GENERATOR FEED									
Special			4C240XLPELSFSWA	4C240 XLPE/LSF/SWA 11/8/99	M	20		0.000	£17.81	£356.20
Catalogue	DRAKA UK		6491BS/95GRN/YL	95 (19/2.52) GRN/YEL	M	20	Newey & Eyre Ltd	90.000	£2.16	£43.20
Catalogue	MEM 500V		804GC	Glasgow 800A TPN Fuse-Sw-disc	EACH	1	Newey & Eyre Ltd	30.000	£1,739.48	£1,739.48
Local			SUNDRIES50	£50 WORTH OF SUNDRY ITEMS	EACH	1		0.000	£50.00	£50.00
Heading	SWITCHROOM CONTAINMENT									
Catalogue	SWIFTS		SC403/3M	SLOTTED CHANNELS 3M	EACH	6	Newey & Eyre Ltd	70.000	£4.26	£25.56
Catalogue	SWIFTS		SA752	CANTILEVER ARMS 300MM	EACH	20	Newey & Eyre Ltd	70.000	£1.43	£28.60
Catalogue	SWIFTS		S8500	90 DEG BRACKETS 48X48	EACH	20	Newey & Eyre Ltd	70.000	£0.17	£3.40
Catalogue	SWIFTS		PN101	LONG SPRING CHANN NUTS M10	PACK	1	Newey & Eyre Ltd	70.000	£9.39	£9.39
Catalogue	SWIFTS		SRFL/150/G	STRAIGHT LENGTHS 150MM G	LGTH	10	Newey & Eyre Ltd	78.000	£16.90	£169.00
Local	NEWLEC		NLZTR08	THREADED ROD 8MM 3M	M	20		0.000	£0.98	£19.60
Special				REDHEAD FIXINGS		40		0.000	£0.30	£12.00
Heading	FIRE/INTRUDER/CCTV/ACCESS CONTAINMENT									
Special	WALSALL		GALV20	GALVANISED 20MM	M	300		0.000	£1.50	£450.00
Heading	MECH SERVICES CONTAINMENT									
Catalogue	SALAMANDR		MG44 N	100X100 TRUNKING COMPLETE	LGTH	15	Newey & Eyre Ltd	70.000	£12.70	£190.50
Catalogue	SALAMANDR		MG44 AGL	100X100 FLAT GUSSET BEND	EACH	10	Newey & Eyre Ltd	70.000	£3.63	£36.30
Catalogue	SALAMANDR		MG44 AGT	100X100 FLAT GUSSET TEE	EACH	10	Newey & Eyre Ltd	70.000	£4.23	£42.30
Catalogue	SALAMANDR		MG33 E	75X75 STOP END	EACH	10	Newey & Eyre Ltd	70.000	£0.72	£7.20
Catalogue	SALAMANDR		MG44 F	100X100 FLANGE	EACH	10	Newey & Eyre Ltd	70.000	£1.17	£11.70
Special	WALSALL		GALV25	GALVANISED 25MM	M	100		0.000	£1.80	£180.00
Special	WALSALL		GALV20	GALVANISED 20MM	M	200		0.000	£1.50	£300.00

At the bottom, there is a search bar with options for Catalogues (All), Local, Kits, and Quotes. The total value of the list is £3,674.43.

Deleting parts

How do I delete parts?

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

Home

Software

Catalogues

Local Data

Kits

Contacts

Quotes

Quotes

Search Quotes

Help

info@electrika.com

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

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Edit

Cut

Copy

Paste

Delete

Clipboard

Kits

Combine

Insert

Blank Special

Heading

Excel

Export

Excel

Views

Material Cost

3 C) SMALL POWER

Copy Disc

Update Prices

Locate

Add To Local

Add To Kit

	Source	Manuf	Cat Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
<input type="checkbox"/>	Catalogue	MK	2949 WHI	13A 2GANG SWITCHSOCKET	EACH	8	£12.63	40.000	£7.58	£60.64
<input type="checkbox"/>	Catalogue	MK	K932 ALM	13A DP SW. CONN UNIT/FLEX OUT	EACH	4	£9.99	30.000	£6.99	£27.96
<input checked="" type="checkbox"/>	Local	MISC		STRIP OUT AND SET UP	LOT	2	£5.28	40.000	£3.17	£6.34
<input checked="" type="checkbox"/>	Special	MISC		20MM GALV CONDUIT	M	90	£2.75	0.000	£2.75	£247.50
<input type="checkbox"/>	Catalogue	DRAKA UK	6491BS/2.5RED	2.5 (7/0.67) RED	M	900	£1.38	80.000	£0.28	£252.00

☒ Catalogues (All)

☐ Local

☐ Kits

☐ Quotes

Cat Number Search

Description Search

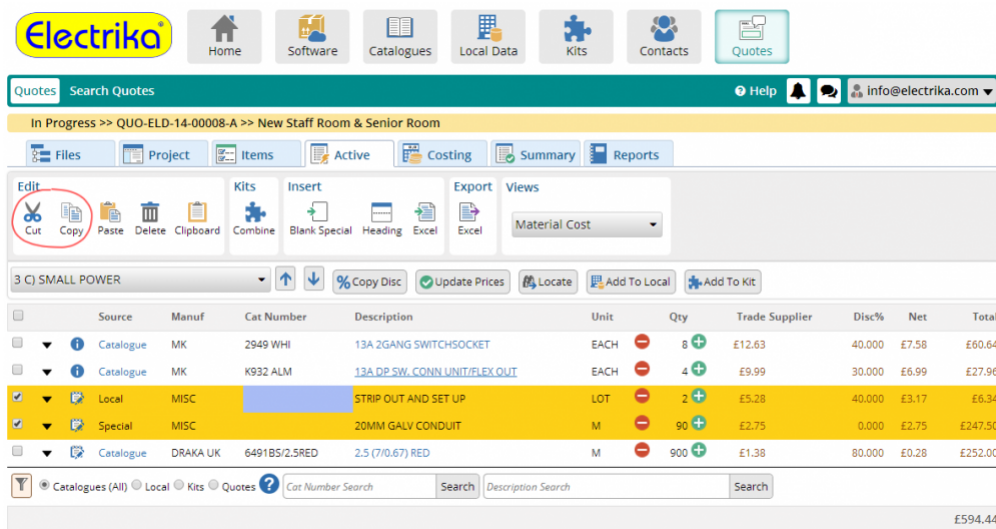
£594.44

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?

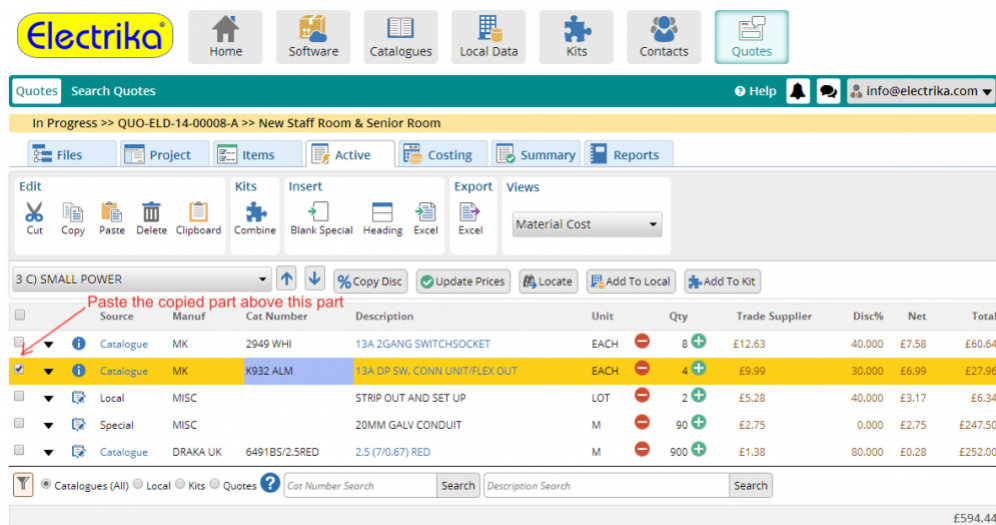
- Select parts you wish to cut or copy and click on the 'Cut' or 'Copy' button.



The screenshot shows the Electrika software interface. The top navigation bar includes icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar and a user profile dropdown. The main menu has tabs for Files, Project, Items, Active, Costing, Summary, and Reports. The 'Edit' menu is open, showing options like Cut, Copy, Paste, Delete, Clipboard, Kits, Insert, Export, and Views. The 'Cut' button is highlighted with a red circle. Below the menu is a table of items with columns: Source, Manuf, Cat Number, Description, Unit, Qty, Trade Supplier, Disc%, Net, and Total. The table contains several rows of data, including '13A 2GANG SWITCHSOCKET', '13A DP SW. CONN UNIT/FLEX OUT', 'STRIP OUT AND SET UP', '20MM GALV CONDUIT', and '2.5 (7/0.67) RED'. The 'Copy Disc' button is also visible.

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.



The screenshot shows the Electrika software interface, similar to the previous one. The 'Edit' menu is open, and the 'Paste' button is highlighted with a red circle. A red arrow points from the 'Paste' button to the row containing '13A DP SW. CONN UNIT/FLEX OUT' in the table below. The table has the same columns as the previous screenshot: Source, Manuf, Cat Number, Description, Unit, Qty, Trade Supplier, Disc%, Net, and Total. The total value at the bottom right is £594.44.

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.

The screenshot shows the Electrika software interface. The top toolbar contains buttons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. The 'Quotes' button is highlighted. Below the toolbar, the 'Clipboard' button is circled in the 'Edit' section of the main menu. The main window displays a list of parts with columns: Source, Manuf, Cat Number, Description, Unit, Qty, Trade Supplier, Disc%, Net, and Total. The parts list includes items like '13A 2GANG SWITCHSOCKET', '13A DP SW. CONN UNIT/FLEX OUT', 'STRIP OUT AND SET UP', '20MM GALV CONDUIT', and '2.5 (7/0.67) RED'. The total value is £594.44.

The screenshot shows the 'Clipboard' dialog box. It has a title bar with a close button. Below the title bar is a table with columns: Source, Manufacturer, Cat Number, Description, Qty, and Trade Price. The table contains three rows of data:

Source	Manufacturer	Cat Number	Description	Qty	Trade Price
Special				1.00	£123.00
Catalogue	MK	K2737WHI	13A 3G DP SWITCHSOCKET	1.00	£37.90
Catalogue	MK	K2737WHI	13A 3G DP SWITCHSOCKET	1.00	£37.90

At the bottom of the dialog box are two buttons: 'Paste Selected' and 'Remove Selected'.

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.

Clipboard ✕

<input type="checkbox"/>	Source	Manufacturer	Cat Number	Description	Qty	Trade Price
<input type="checkbox"/>	Special				1.00	£123.00
<input type="checkbox"/>	Catalogue	MK	K2737WHI	13A 3G DP SWITCHSOCKET	1.00	£37.90
<input type="checkbox"/>	Catalogue	MK	K2737WHI	13A 3G DP SWITCHSOCKET	1.00	£37.90

Paste Selected **Remove Selected**

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

Clipboard ✕

<input type="checkbox"/>	Source	Manufacturer	Cat Number	Description	Qty	Trade Price
<input type="checkbox"/>	Special				1.00	£123.00
<input type="checkbox"/>	Catalogue	MK	K2737WHI	13A 3G DP SWITCHSOCKET	1.00	£37.90
<input type="checkbox"/>	Catalogue	MK	K2737WHI	13A 3G DP SWITCHSOCKET	1.00	£37.90

Paste Selected **Remove Selected**

✿ 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.

Please confirm ✕

Note: This part will also be removed from the Clipboard.

Are you sure you want to delete the selected part?

OK **Cancel**

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.

The screenshot shows the Electrika software interface. At the top, there's a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar and a user profile dropdown. The main area displays a project titled 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. A menu bar includes Files, Project, Items, Active, Costing, Summary, and Reports. Under the 'Items' menu, the 'Kits' option is highlighted, and the 'Combine' button (represented by a puzzle piece icon) is circled in red. Below the menu, there's a table of items with columns for Source, Manuf, Cat Number, Description, Unit, Qty, Trade Supplier, Disc%, Net, and Total. The table lists several items, including '13A 2GANG SWITCHSOCKET', '13A DP SW. CONN UNIT/FLEX OUT', 'STRIP OUT AND SET UP', '20MM GALV CONDUIT', and '2.5 (7/0.67) RED'. At the bottom right, a total value of £594.44 is displayed.

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

The screenshot shows a 'Create Kit' dialog box. It has a blue header with the title 'Create Kit' and a close button (X). Below the header are three text input fields labeled 'Manufacturer', 'Cat Number', and 'Description'. At the bottom right of the dialog is a blue 'Apply' button.

- This will combine all the parts in one kit.

Home

Software

Catalogues

Local Data

Kits

Contacts

Quotes

Quotes

Search Quotes

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info@electrika.com

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

Files

Project

Items

Active

Costing

Summary

Reports

Edit

Cut

Copy

Paste

Delete

Clipboard

Kits

Combine

Insert

Blank Special

Heading

Excel

Export

Excel

Views

Material Cost

3 C) SMALL POWER

Copy Disc

Update Prices

Locate

Add To Local

Add To Kit

	Source	Manuf	Cat Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
	Catalogue	MK	2949 WHI	13A 2GANG SWITCHSOCKET	EACH	8	£12.63	40.000	£7.58	£60.64
	Kit	MISC	KIT004	Panel Board	EACH	1	£298.02	5.443	£281.80	£281.80
	Catalogue	DRAKA UK	6491BS/2.5RED	2.5 (7/0.67) RED	M	900	£1.38	80.000	£0.28	£252.00

Catalogues (All)

Local

Kits

Quotes

?

Cat Number Search

Search

Description Search

Search

£594.44

Expanding and collapsing a Kit

How do I view the kit parts?

- Click on ▼ to view the kit menu.

The screenshot shows the Electrika software interface. At the top, there's a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar and a user profile dropdown. The main area displays a project titled 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. A toolbar contains various icons for editing, inserting, and exporting. Below the toolbar, there's a table of items. The 'Expand / Collapse kit' link is circled in red.

Source	Manuf	Cat Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
Catalogue	MK	2949 WHI	13A 2GANG SWITCHSOCKET	EACH	8	£12.63	40.000	£7.58	£60.64
Kit	MISC	KIT004	Panel Board	EACH	1	£298.02	5.443	£281.80	£281.80
Catalogue	MK	3491BS/2.5RED	2.5 (7/0.67) RED	M	900	£1.38	80.000	£0.28	£252.00

- 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 summarizes the kit, and the parts marked in blue are the parts contained within the Kit.

The screenshot shows the Electrika software interface with the kit expanded. The 'Expand / Collapse kit' link is still visible. The table below shows the expanded kit details, with the kit header highlighted in red and its components in blue.

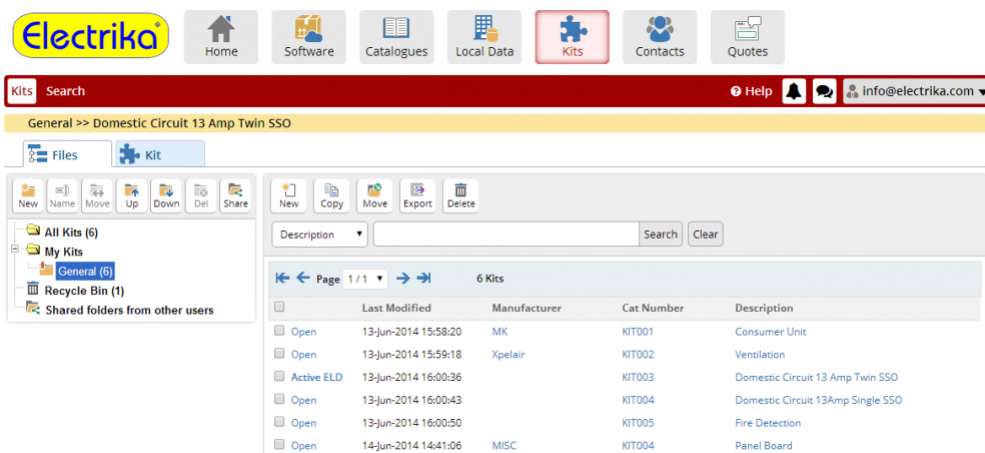
Source	Manuf	Cat Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
Catalogue	MK	2949 WHI	13A 2GANG SWITCHSOCKET	EACH	8	£12.63	40.000	£7.58	£60.64
Kit	MISC	KIT004	Panel Board	EACH	1	£298.02	5.443	£281.80	£281.80
Catalogue	MK	K932 ALM	13A DP SW. COHN UNIT/FLEX OUT	EACH	4	£9.99	30.000	£6.99	£27.96
Local	MISC		STRIP OUT AND SET UP	LOT	2	£5.28	40.000	£3.17	£6.34
Special	MISC		20MM GALV CONDUIT	M	90	£2.75	0.000	£2.75	£247.50
Catalogue	DRAKA UK	6491BS/2.5RED	2.5 (7/0.67) RED	M	900	£1.38	80.000	£0.28	£252.00

Adding a Kit to the Kit library

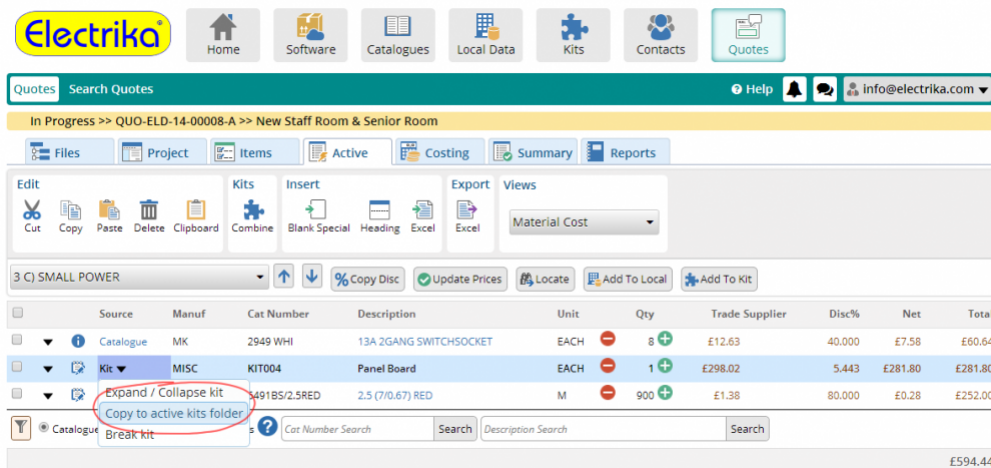
You may create a kit in a quote and want to reuse it for other files in the future.

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.

Home

Software

Catalogues

Local Data

Kits

Contacts

Quotes

Kits

Search

Help

info@electrika.com

General >> Domestic Circuit 13 Amp Twin SSO

Files

Kit

New

Open

Copy

Move

Export

Delete

All Kits (6)

My Kits

General (6)

Recycle Bin (1)

Shared folders from other users

Description

Search

Clear

6 Kits

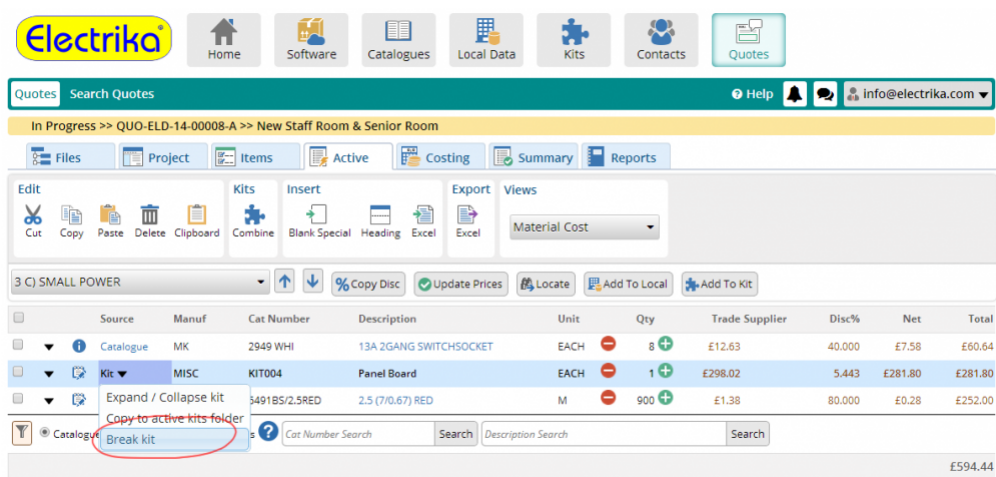
	Last Modified	Manufacturer	Cat Number	Description
<input type="checkbox"/> Open	13-Jun-2014 15:58:20	MK	KIT001	Consumer Unit
<input type="checkbox"/> Open	13-Jun-2014 15:59:18	Xpelair	KIT002	Ventilation
<input type="checkbox"/> Active ELD	13-Jun-2014 16:00:36		KIT003	Domestic Circuit 13 Amp Twin SSO
<input type="checkbox"/> Open	13-Jun-2014 16:00:43		KIT004	Domestic Circuit 13Amp Single SSO
<input type="checkbox"/> Open	13-Jun-2014 16:00:50		KIT005	Fire Detection
<input type="checkbox"/> Open	14-Jun-2014 14:41:06	MISC	KIT004	Panel Board

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.

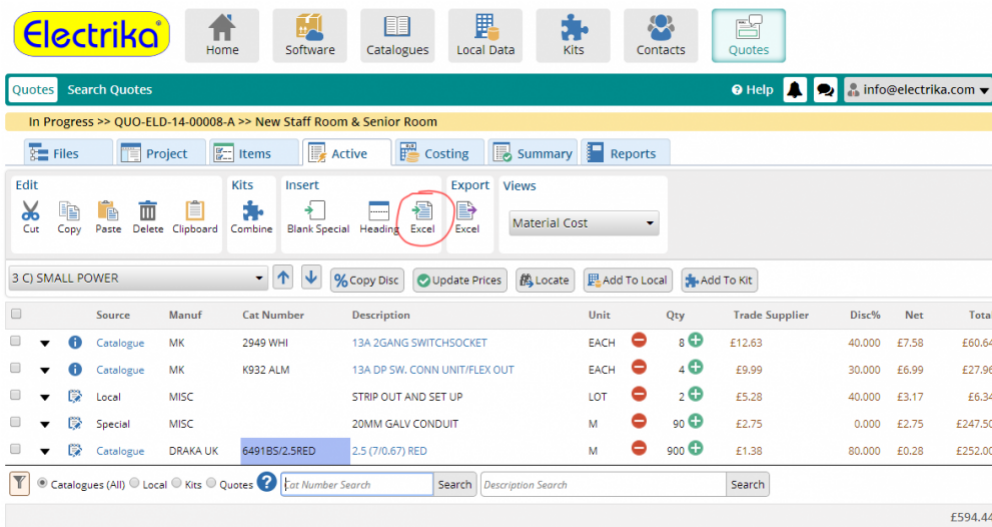


Importing & exporting parts

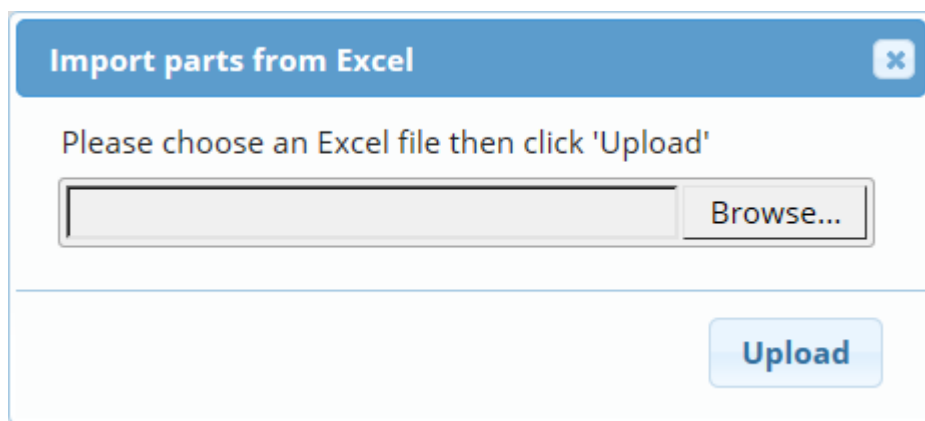
If you have a parts list in Excel format you can import them into the active parts list.

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.

Map Columns

Columns in Electrika

Columns in your file

Manufacturer	➔	Manuf
Cat Number	➔	Cat Number
Description	➔	Please select / Not Available
Unit	➔	S
Quantity	➔	Manuf
Trade Price	➔	Cat Number
Discount	➔	Description
Unit Hours	➔	Qty
Mat Overhead	➔	Unit
Mat Profit	➔	Trade
Lab Overhead	➔	Supplier
Lab Profit	➔	Disc%
Equipment	➔	Net
Equip Overhead	➔	Total
Equip Profit	➔	L
Subcontract	➔	Rate/Hr
Sub Overhead	➔	Unit Hrs
Sub Profit	➔	Total Hrs
		Lab/Unit
		Lab Total
		S
		Manuf
		Cat Number
		Description
		Qty
		Unit
		Trade
		Supplier
		Disc%
		Net
		Total

☒ Import all parts as Specials
 ☐ Search for the parts in the Electrika and L

Import

How do I export parts?

- Click on the 'Export Excel' button.

Electrika

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Excel

Export

Excel

Views

Material Cost

3 C) SMALL POWER

% Copy Disc

Update Prices

Locate

Add To Local

Add To Kit

	Source	Manuf	Cat Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
	▼ Catalogue	MK	2949 WHI	13A 2GANG SWITCHSOCKET	EACH	8	£12.63	40.000	£7.58	£60.64
	▼ Catalogue	MK	K932 ALM	13A DP SW. CONN UNIT/FLEX OUT	EACH	4	£9.99	30.000	£6.99	£27.96
	▼ Local	MISC		STRIP OUT AND SET UP	LOT	2	£5.28	40.000	£3.17	£6.34
	▼ Special	MISC		20MM GALV CONDUIT	M	90	£2.75	0.000	£2.75	£247.50
	▼ Catalogue	DRAKA UK	6491BS/2.5RED	2.5 (7/0.67) RED	M	900	£1.38	80.000	£0.28	£252.00

Catalogues (All)

Local

Kits

Quotes

?

Cat Number Search

Search

Description Search

Search

£594.44

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.

The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar labeled 'Search Quotes' and a user profile icon. The main area displays a project titled 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. A toolbar contains icons for Files, Project, Items, Active, Costing, Summary, and Reports. Below the toolbar, there are sections for Edit, Kits, Insert, Export, and Views. The 'Views' dropdown menu is open, showing options for Cost Views (Material Cost, Labour Cost, Mat & Lab Cost, Equipment Cost, Subcontract Cost) and Sell Views (Material Sell, Labour Sell, Mat & Lab Sell, Equipment Sell, Subcontract Sell). There is also a 'Summary Views' section with 'Sell Summary' and 'Show All' options. The background shows a table with columns for Source, Manuf, Cat Number, Description, and pricing details.

Source	Manuf	Cat Number	Description	%	Net	Total
Catalogue	MK	2949 WHI	13A 2GANG SWITCHSOCKET			
Catalogue	MK	K932 ALM	13A DP SW. CONN UNIT/FLEX OUT	100	£7.58	£60.64
Local	MISC		STRIP OUT AND SET UP	100	£6.99	£27.96
Special	MISC		20MM GALV CONDUIT	100	£3.17	£6.34
Catalogue	DRAKA UK	6491BS/2.5RED	2.5 (7/0.67) RED	100	£2.75	£247.50
				100	£0.28	£252.00

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.

The screenshot shows the Electrika software interface. The 'Items' tab is active, and a dropdown menu is open for '3 C) SMALL POWER'. The menu lists the following items:

- 1 A) SUB-MAIN & DISTRIBUTION
- 2 B) LIGHTING AND EMERGENCY LIGHTING
- 3 C) SMALL POWER
- 4 D) FIRE ALARM SYSTEM
- 5 E) TELEPHONE
- 6 F) HEATING AND VENTILATION
- 7 G) INTRUDER ALARM SYSTEM
- Add New Item

The main table displays the following data:

Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
13A	2 GANG SWITCH/ SOCKET	EACH	8	£12.63	40.00%	£7.58	£60.64
13A	DP SW. CONN UNIT/FLEX OUT	EACH	4	£9.99	30.00%	£6.99	£27.96
	STRIP OUT AND SET UP	LOT	2	£5.28	40.00%	£3.17	£6.34
20MM	GALV CONDUIT	M	90	£2.75	0.00%	£2.75	£247.50
2.5 RED	2.5 (7/0.67) RED	M	900	£1.38	80.00%	£0.28	£252.00

The total value at the bottom right is £594.44.

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

- Click on the 'Add New Item' link.

The screenshot shows the Electrika software interface. The 'Items' tab is active, and the 'Add New Item' link is highlighted in the dropdown menu. The main table displays the following data:

Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
13A	2 GANG SWITCH/ SOCKET	EACH	8	£12.63	40.00%	£7.58	£60.64
13A	DP SW. CONN UNIT/FLEX OUT	EACH	4	£9.99	30.00%	£6.99	£27.96
	STRIP OUT AND SET UP	LOT	2	£5.28	40.00%	£3.17	£6.34
20MM	GALV CONDUIT	M	90	£2.75	0.00%	£2.75	£247.50
2.5 RED	2.5 (7/0.67) RED	M	900	£1.38	80.00%	£0.28	£252.00

The total value at the bottom right is £594.44.

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.

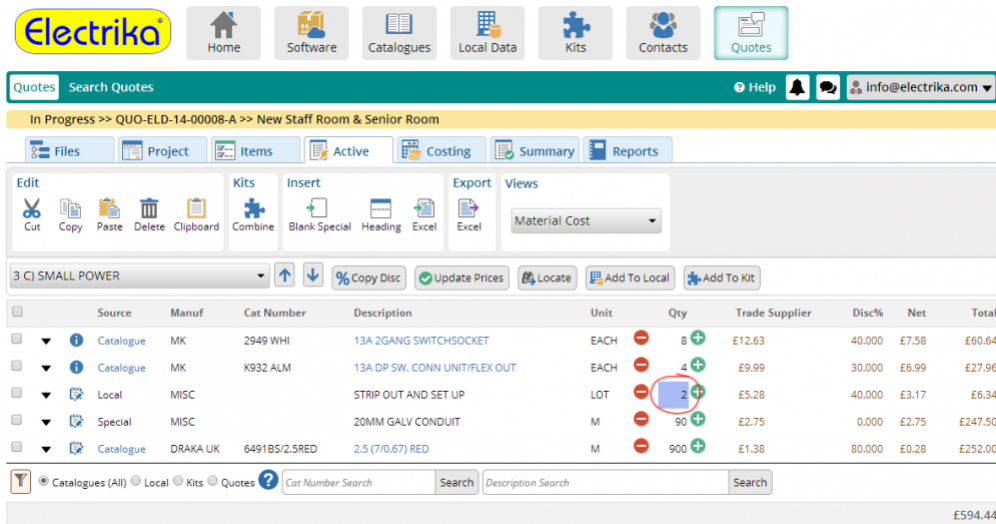
The screenshot shows the Electrika software interface. At the top, there's a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar and a user profile dropdown. The main area displays a project titled 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. A toolbar contains various icons for editing, inserting, and exporting. Below the toolbar, a table lists parts with columns for Source, Manuf, Cat Number, Description, Unit, Qty, Trade Supplier, Disc%, Net, and Total. The table contains several rows of data. Two rows are highlighted in yellow: 'STRIP OUT AND SET UP' and '20MM GALV CONDUIT'. Above the table, there are buttons for 'Up' and 'Down' arrows, which are circled in red to indicate they are used for reordering parts. At the bottom, there's a search bar and a total value of £594.44.

Source	Manuf	Cat Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
Catalogue	MK	2949 WHI	13A 2GANG SWITCHSOCKET	EACH	8	£12.63	40.000	£7.58	£60.64
Catalogue	MK	K932 ALM	13A DP SW. CONN UNIT/FLEX OUT	EACH	4	£9.99	30.000	£6.99	£27.96
Local	MISC		STRIP OUT AND SET UP	LOT	2	£5.28	40.000	£3.17	£6.34
Special	MISC		20MM GALV CONDUIT	M	90	£2.75	0.000	£2.75	£247.50
Catalogue	DRAKA UK	6491B5/2.5RED	2.5 (7/0.67) RED	M	900	£1.38	80.000	£0.28	£252.00

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.



Electrika

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Files Project Items Active Costing Summary Reports

Edit Kits Insert Export Views

Cut Copy Paste Delete Clipboard Combine Blank Special Heading Excel Excel

Material Cost

3 C) SMALL POWER

% Copy Disc Update Prices Locate Add To Local Add To Kit

	Source	Manuf	Cat Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
	Catalogue	MK	2949 WHI	13A 2GANG SWITCHSOCKET	EACH	8	£12.63	40.000	£7.58	£60.64
	Catalogue	MK	K932 ALM	13A DP SW. CONN UNIT/FLEX OUT	EACH	4	£9.99	30.000	£6.99	£27.96
	Local	MISC		STRIP OUT AND SET UP	LOT	1	£5.28	40.000	£3.17	£6.34
	Special	MISC		20MM GALV CONDUIT	M	90	£2.75	0.000	£2.75	£247.50
	Catalogue	DRAKA UK	6491BS/2.5RED	2.5 (7/0.67) RED	M	900	£1.38	80.000	£0.28	£252.00


☒ Catalogues (All)
 ☐ Local
 ☐ Kits
 ☐ Quotes

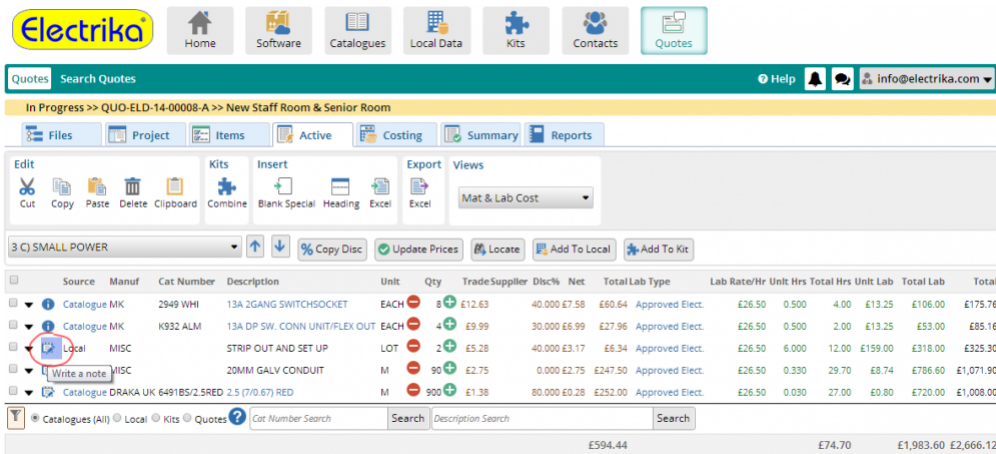
Cat Number Search Search Description Search Search

£594.44

Adding notes to a part

How do I add notes to a part?

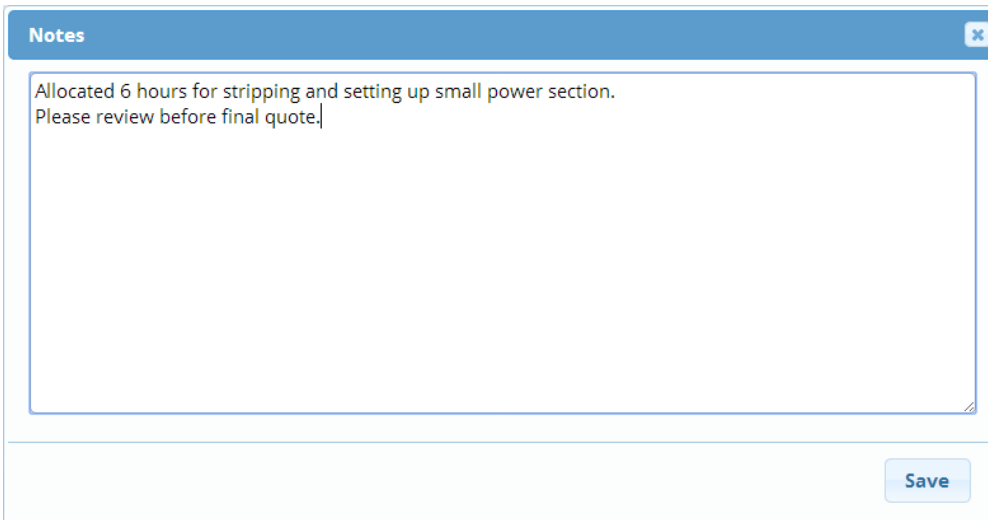
- Click on  icon. This will display a dialog where you can type in the note regarding the part.



The screenshot shows the Electrika software interface. At the top, there's a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar and a status bar indicating 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. The main area displays a list of items with columns for Source, Manuf, Cat Number, Description, Unit, Qty, Trade Supplier, Disc%, Net, Total Lab Type, Lab Rate/Hr, Unit Hrs, Total Hrs, Unit Lab, Total Lab, and Total. The 'Local' item is highlighted, and a red circle is drawn around the 'Write a note' icon in the 'Local' column.

Source	Manuf	Cat Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total Lab Type	Lab Rate/Hr	Unit Hrs	Total Hrs	Unit Lab	Total Lab	Total
Catalogue MK	2949 WHI	13A 2GANG SWITCHSOCKET	EACH	8	£12.63	40,000	£7.58	£60.64	Approved Elect.	£26.50	0.500	4.00	£13.25	£106.00	£175.76
Catalogue MK	K932 ALM	13A DP SW. CONN UNIT/FLEX OUT	EACH	4	£9.99	30,000	£6.99	£27.96	Approved Elect.	£26.50	0.500	2.00	£13.25	£53.00	£85.16
Local	MISC	STRIP OUT AND SET UP	LOT	2	£5.28	40,000	£3.17	£6.34	Approved Elect.	£26.50	6.000	12.00	£159.00	£318.00	£325.30
Local	MISC	20MM GALV CONDUIT	M	90	£2.75	0,000	£2.75	£247.50	Approved Elect.	£26.50	0.330	29.70	£8.74	£786.60	£1,071.90
Catalogue DRAKA UK	6491B5/2.5RED	2.5 (7/0.67) RED	M	900	£1.38	80,000	£0.28	£252.00	Approved Elect.	£26.50	0.030	27.00	£0.80	£720.00	£1,008.00




At the bottom, there's a summary bar showing totals: £594.44, £74.70, £1,983.60, £2,666.12.



The 'Notes' dialog box is open, showing a text area with the following note:

Allocated 6 hours for stripping and setting up small power section.
Please review before final quote.

At the bottom right of the dialog box is a 'Save' button.

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

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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.

The screenshot shows the Electrika software interface. At the top, there's a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar and a status bar indicating 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. The main area displays a table of parts with columns: Source, Manuf, Cat Number, Description, Unit, Qty, Trade Supplier, Disc%, Net, and Total. The first two rows have 'Catalogue' in the Source column, which is circled in red. The third row has 'Local' in the Source column. The bottom of the interface shows a summary bar with '3 C) SMALL POWER' and a total value of £594.44.

Source	Manuf	Cat Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
Catalogue	MK	2949 WHI	13A 2GANG SWITCHSOCKET	EACH	8	£12.63	40.000	£7.58	£60.64
Catalogue	MK	K932 ALM	13A DP SW. CONN UNIT/FLEX OUT	EACH	4	£9.99	30.000	£6.99	£27.96
Local	MISC		STRIP OUT AND SET UP	LOT	2	£5.28	40.000	£3.17	£6.34
Special	MISC		20MM GALV CONDUIT	M	90	£2.75	0.000	£2.75	£247.50
Catalogue	DRAKA UK	6491B5/2.5RED	2.5 (7/0.67) RED	M	900	£1.38	80.000	£0.28	£252.00

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

The dialog box has a blue header with the text 'Please confirm' and a close button (X). The main text reads: 'This will change the part to a Special, allowing you to edit all the columns. Once changed it cannot revert back to Catalogue status. Continue?'. At the bottom, there are two buttons: 'OK' and 'Cancel'.

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

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Material Cost

3 C) SMALL POWER

Copy Disc

Update Prices

Locate

Add To Local

Add To Kit

	Source	Manuf	Cat. Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
	Catalogue	MK	2949 WHI	13A 2GANG SWITCHSOCKET	EACH	8	£12.63	40.000	£7.58	£60.64
	Special	MK	K932 ALM	13A DP SW. CONN UNIT/FLEX OUT	EACH	4	£9.99	30.000	£6.99	£27.96
	Local	MISC		STRIP OUT AND SET UP	LOT	2	£5.28	40.000	£3.17	£6.34
	Special	MISC		20MM GALV CONDUIT	M	90	£2.75	0.000	£2.75	£247.50
	Catalogue	DRAKA UK	6491B5/2.5RED	2.5 (7/0.67) RED	M	900	£1.38	80.000	£0.28	£252.00

Catalogues (All)

Local

Kits

Quotes

Cat Number Search

Description Search

Search

£594.44

Assigning a supplier to a part

How do I assign a supplier to a part?

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

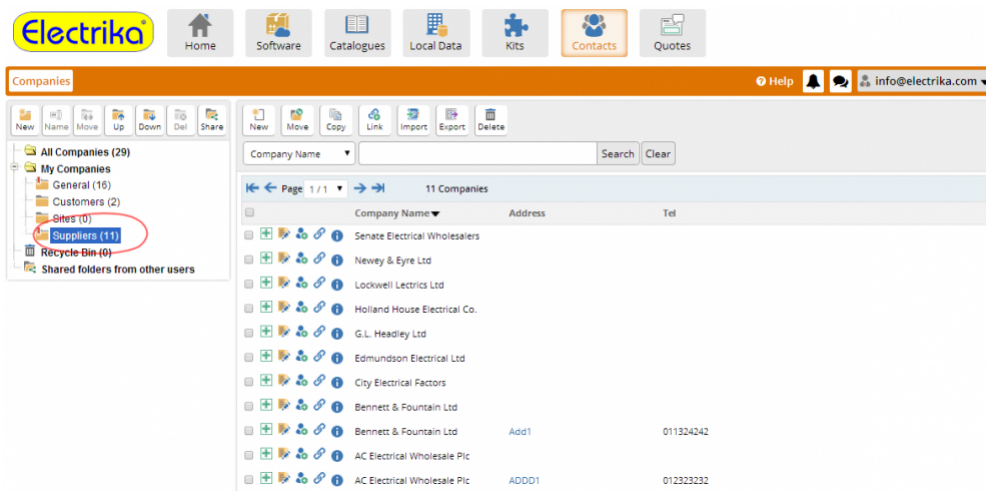
The screenshot shows the Electrika software interface. At the top, there's a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar and a status bar indicating 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. The main area displays a table of parts. The table has columns for Source, Manuf, Cat Number, Description, Unit, Qty, Trade Supplier, Disc%, Net, and Total. A red circle highlights the 'Trade Supplier' column header.

Source	Manuf	Cat Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
Catalogue	MK	2949 WHI	13A 2GANG SWITCHSOCKET	EACH	8	City Electrical Factors	40.000	£7.58	£60.64
Special	MK	K932 ALM	13A DP SW. CONN UNIT/FLEX OUT	EACH	4	City Electrical Factors	30.000	£6.99	£27.96
Local	MISC		STRIP OUT AND SET UP	LOT	2		40.000	£3.17	£6.34
Special	MISC		20MM GALV CONDUIT	M	90		0.000	£2.75	£247.50
Catalogue	DRAKA UK	6491BS/2.5RED	2.5 (7/0.67) RED	M	900		80.000	£0.28	£252.00

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

The screenshot shows a 'Choose a supplier' dialog box. It has a title bar with a close button. Below the title bar is a list of suppliers, each with a green plus icon and a blue information icon. The suppliers listed are: City Electrical Factors, Edmundson Electrical Ltd, Lockwell Lectrics Ltd, Bennett & Fountain Ltd, AC Electrical Wholesale Plc, Newey & Eyre Ltd, G.L. Headley Ltd, Holland House Electrical Co., Senate Electrical Wholesalers, AC Electrical Wholesale Plc, and Bennett & Fountain Ltd. At the bottom of the list, there are two buttons: 'Add / Edit a supplier' and 'Clear supplier from the part'.

Supplier	Code	Phone
City Electrical Factors		
Edmundson Electrical Ltd		
Lockwell Lectrics Ltd		
Bennett & Fountain Ltd		
AC Electrical Wholesale Plc		
Newey & Eyre Ltd		
G.L. Headley Ltd		
Holland House Electrical Co.		
Senate Electrical Wholesalers		
AC Electrical Wholesale Plc	ADDD1	012323232
Bennett & Fountain Ltd	Add1	011324242



- To assign a supplier to your part click on



- This will assign the supplier to the part.

The screenshot shows the Electrika software interface. At the top, there's a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar and a status bar indicating 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. The main area displays a table of items with columns: Source, Manuf, Cat Number, Description, Unit, Qty, Trade Supplier, Disc%, Net, and Total. The 'Trade Supplier' column for 'City Electrical Factors' is highlighted with a red circle.

Source	Manuf	Cat Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
Catalogue	MK	2949 WHI	13A 2GANG SWITCHSOCKET	EACH	8	City Electrical Factors	40.00%	£7.58	£60.64
Special	MK	K932 ALM	13A DP SW. CONN UNIT/FLEX OUT	EACH	4	City Electrical Factors	40.00%	£6.99	£27.96
Local	MISC		STRIP OUT AND SET UP	LOT	2		40.00%	£3.17	£6.34
Special	MISC		20MM GALV CONDUIT	M	90		0.00%	£2.75	£247.50
Catalogue	DRAKA UK	6491BS/2.5RED	2.5 (7/6.67) RED	M	900		80.00%	£0.28	£252.00

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

The screenshot shows a 'Choose a supplier' dialog box. It lists several suppliers with a plus icon and an information icon next to each name. At the bottom, there are two buttons: 'Add / Edit a supplier' and 'Clear supplier from the part'. The 'Add / Edit a supplier' button is highlighted with a red circle.

Supplier Name	Code	Phone Number
City Electrical Factors		
Edmundson Electrical Ltd		
Lockwell Lectrics Ltd		
Bennett & Fountain Ltd		
AC Electrical Wholesale Plc		
Newey & Eyre Ltd		
G.L. Headley Ltd		
Holland House Electrical Co.		
Senate Electrical Wholesalers		
AC Electrical Wholesale Plc	ADDD1	012323232
Bennett & Fountain Ltd	Add1	011324242

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

Electrika Home Software Catalogues Local Data Kits **Contacts** Quotes

Companies Help info@electrika.com

New Company

Company Details

Company Name: Spark Electrical Suppliers

Address: 23 Blackburn Road

Post Code:

Tel:

Fax:

Website:

Email:

Notes:

Contact Details

Title (Mr/Ms...): Mr

First Name: Steven

Surname: Smith

Job Title: Director

Tel:

Mobile:

Email:

Notes:

Add

Choose a supplier

+	i	City Electrical Factors		
+	i	Edmundson Electrical Ltd		
+	i	Lockwell Lectrics Ltd		
+	i	Bennett & Fountain Ltd		
+	i	AC Electrical Wholesale Plc		
+	i	Newey & Eyre Ltd		
+	i	G.L. Headley Ltd		
+	i	Holland House Electrical Co.		
+	i	Senate Electrical Wholesalers		
+	i	AC Electrical Wholesale Plc	ADDD1	012323232
+	i	Bennett & Fountain Ltd	Add1	011324242
+	i	Spark Electrical Suppliers	23 Blackburn Road	

Add / Edit a supplier Clear supplier from the part

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.

Choose a supplier

- + i City Electrical Factors
- + i Edmundson Electrical Ltd
- + i Lockwell Lectrics Ltd
- + i Bennett & Fountain Ltd
- + i AC Electrical Wholesale Plc
- + i Newey & Eyre Ltd
- + i G.L. Headley Ltd
- + i Holland House Electrical Co.
- + i Senate Electrical Wholesalers
- + i AC Electrical Wholesale Plc ADDD1 012323232
- + i Bennett & Fountain Ltd Add1 011324242
- + i Spark Electrical Suppliers 23 Blackburn Road

Add / Edit a supplier
Clear supplier from the part



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.

Home
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Search Quotes

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

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General

Quote Ref: QUO-ELD-14-00008-A Cust Ref: Estimator: E.J. MOORE

Project: New Staff Room & Senior Room

Note:

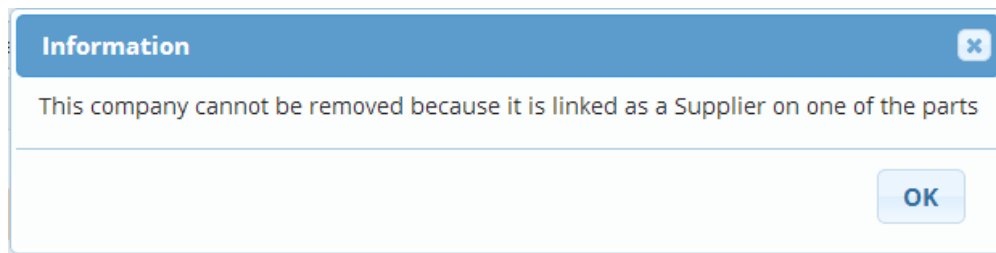
Status: ☒ Quotation Delivery Period: 2-3 Days Tender Sell: £0.00

Created: 25-Jun-2004 Received: 25-Jun-2004 Due: 25-Jun-2004 Valid To: 13-Jun-2014

Companies linked with this project

Search Company Name, Address 1, Post Code or Telephone Search New Company

Folder	Company Name	Address	Tel
General	HILLMAN & SONS LTD		0208 333 2444
Suppliers	City Electrical Factors		



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.

The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar and a status bar indicating 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. The main area displays a list of parts with columns: Source, Manuf, Cat Number, Description, Unit, Qty, Lab Type, Lab Rate/Hr, Unit Hrs, Total Hrs, Unit Lab, and Total Lab. The 'Lab Type' column for the first part, '13A 2GANG SWITCHSOCKET', is highlighted with a red circle. The 'Lab Type' for this part is 'Approved Elect.'. Below the list, there are search bars for 'Cat Number Search' and 'Description Search', and a summary row showing totals for '£74.70' and '£1,983.60'.

Source	Manuf	Cat Number	Description	Unit	Qty	Lab Type	Lab Rate/Hr	Unit Hrs	Total Hrs	Unit Lab	Total Lab
Catalogue	MK	2949 WHI	13A 2GANG SWITCHSOCKET	EACH	8	Approved Elect.	£26.50	0.500	4.00	£13.25	£106.00
Special	MK	K932 ALM	13A DP SW. CONN UNIT/FLEX OUT	EACH	4	Approved Elect.	£26.50	0.500	2.00	£13.25	£53.00
Local	MISC		STRIP OUT AND SET UP	LOT	2	Approved Elect.	£26.50	6.000	12.00	£159.00	£318.00
Special	MISC		20MM GALV CONDUIT	M	90	Approved Elect.	£26.50	0.330	29.70	£8.74	£786.60
Catalogue	DRAKA UK	6491BS/2.5RED	2.5 (7/0.67) RED	M	900	Approved Elect.	£26.50	0.030	27.00	£0.80	£720.00
										£74.70	£1,983.60

- 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

Add New

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

Default	Apply	Name	Rate/Hr	Delete
<input checked="" type="radio"/>	<input data-bbox="368 499 400 539" type="button" value="+"/>	Approved Elect.	£26.50	<input data-bbox="959 499 991 539" type="button" value="Delete"/>
<input type="radio"/>	<input data-bbox="368 562 400 602" type="button" value="+"/>	Apprentice	£4.50	<input data-bbox="959 562 991 602" type="button" value="Delete"/>
<input type="radio"/>	<input data-bbox="368 624 400 665" type="button" value="+"/>	Labourer	£5.00	<input data-bbox="959 624 991 665" type="button" value="Delete"/>
<input type="radio"/>	<input data-bbox="368 687 400 728" type="button" value="+"/>	Foreman	£10.90	<input data-bbox="959 687 991 728" type="button" value="Delete"/>
<input type="radio"/>	<input data-bbox="368 750 400 790" type="button" value="+"/>	Subcontract	£10.00	<input data-bbox="959 750 991 790" type="button" value="Delete"/>
<input type="radio"/>	<input data-bbox="368 813 400 853" type="button" value="+"/>	Commissioning	£11.00	<input data-bbox="959 813 991 853" type="button" value="Delete"/>

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'.

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
<input checked="" type="radio"/>	<input data-bbox="368 831 400 875" type="button" value="+"/>	Approved Elect.	£26.50	<input data-bbox="959 831 991 875" type="button" value="Delete"/>
<input type="radio"/>	<input data-bbox="368 891 400 936" type="button" value="+"/>	Apprentice	£4.50	<input data-bbox="959 891 991 936" type="button" value="Delete"/>
<input type="radio"/>	<input data-bbox="368 952 400 996" type="button" value="+"/>	Labourer	£5.00	<input data-bbox="959 952 991 996" type="button" value="Delete"/>
<input type="radio"/>	<input data-bbox="368 1012 400 1057" type="button" value="+"/>	Foreman	£10.90	<input data-bbox="959 1012 991 1057" type="button" value="Delete"/>
<input type="radio"/>	<input data-bbox="368 1072 400 1117" type="button" value="+"/>	Subcontract	£10.00	<input data-bbox="959 1072 991 1117" type="button" value="Delete"/>
<input type="radio"/>	<input data-bbox="368 1133 400 1178" type="button" value="+"/>	Commissioning	£11.00	<input data-bbox="959 1133 991 1178" type="button" value="Delete"/>

Save as default means use this list for all new files

Save as default

Editing the labour type

How do I edit the labour type?

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

Labour Types

Add New

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

Default	Apply	Name	Rate/Hr	Delete
<input type="radio"/>	<input checked="" type="checkbox"/>	Approved Elect.	£26.50	
<input type="radio"/>	<input checked="" type="checkbox"/>	Apprentice	£4.50	
<input type="radio"/>	<input checked="" type="checkbox"/>	Labourer	£5.00	
<input type="radio"/>	<input checked="" type="checkbox"/>	Foreman	£10.90	
<input type="radio"/>	<input checked="" type="checkbox"/>	Subcontract	£10.00	
<input type="radio"/>	<input checked="" type="checkbox"/>	Commissioning	£11.00	

Save as default means use this list for all new files

Save as default

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

Labour Types ✕

Add New

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

Default	Apply	Name	Rate/Hr	Delete
<input type="radio"/>			26.50	
<input type="radio"/>			£4.50	
<input type="radio"/>			£5.00	
<input type="radio"/>			10.90	
<input type="radio"/>			10.00	
<input type="radio"/>	<input checked="" type="checkbox"/>	Commissioning	£11.00	

Save as default means use this list for all new files

Save as default

Edit labour type label ✕

Apply

Labour Types ✕

Add New

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

Default	Apply	Name	Rate/Hr	Delete
<input type="radio"/>			26.50	
<input type="radio"/>			£4.50	
<input type="radio"/>			£5.00	
<input type="radio"/>			10.90	
<input type="radio"/>			10.00	
<input type="radio"/>	<input checked="" type="checkbox"/>	Commissioning	£11.00	

Save as default means use this list for all new files

Save as default

Edit labour Rate Per Hr ✕

Apply

Deleting a labour type

How do I remove a labour type?













- Click on  to delete a labour type.

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
<input checked="" type="radio"/>		Approved Elect.	£26.50	
<input type="radio"/>		Apprentice	£4.50	
<input type="radio"/>		Labourer	£5.00	
<input type="radio"/>		Foreman	£10.90	
<input type="radio"/>		Subcontract	£10.00	
<input type="radio"/>		Commissioning	£11.00	

Save as default means use this list for all new files

Save as default

Setting a default labour type

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

How do I set default labour type?

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

Labour Types

 Add New

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

Default	Apply	Name	Rate/Hr	Delete
<input checked="" type="radio"/>		Approved Elect.	£26.50	
<input type="radio"/>		Apprentice	£4.50	
<input type="radio"/>		Labourer	£5.00	
<input type="radio"/>		Foreman	£10.90	
<input type="radio"/>		Subcontract	£10.00	
<input type="radio"/>		Commissioning	£11.00	

Save as default means use this list for all new files

Save as default

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.

Labour Types

Add New

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

Default	Apply	Name	Rate/Hr	Delete
<input checked="" type="radio"/>	<input data-bbox="368 913 400 958" type="button" value="+"/>	Approved Elect.	£26.50	<input data-bbox="959 913 991 958" type="button" value="X"/>
<input type="radio"/>	<input data-bbox="368 981 400 1025" type="button" value="+"/>	Apprentice	£4.50	<input data-bbox="959 981 991 1025" type="button" value="X"/>
<input type="radio"/>	<input data-bbox="368 1048 400 1093" type="button" value="+"/>	Labourer	£5.00	<input data-bbox="959 1048 991 1093" type="button" value="X"/>
<input type="radio"/>	<input data-bbox="368 1115 400 1160" type="button" value="+"/>	Foreman	£10.90	<input data-bbox="959 1115 991 1160" type="button" value="X"/>
<input type="radio"/>	<input data-bbox="368 1182 400 1227" type="button" value="+"/>	Subcontract	£10.00	<input data-bbox="959 1182 991 1227" type="button" value="X"/>
<input type="radio"/>	<input data-bbox="368 1249 400 1294" type="button" value="+"/>	Commissioning	£11.00	<input data-bbox="959 1249 991 1294" type="button" value="X"/>

Save as default means use this list for all new files

Copying discounts to multiple parts

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

The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar and a status bar indicating 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. The main area displays a list of parts with columns for Source, Manuf, Cat Number, Description, Unit, Qty, Trade Supplier, Disc%, Net, and Total. The 'Copy Disc' button is highlighted in the top toolbar. The table shows several parts, including '13A 2GANG SWITCHSOCKET' and '13A DP SW. CONN UNIT/FLEX OUT', both with a 40.000% discount from 'City Electrical Factors'.

Source	Manuf	Cat Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
Catalogue	MK	2949 WHI	13A 2GANG SWITCHSOCKET	EACH	8	City Electrical Factors	40.000	£7.58	£60.64
Special	MK	K932 ALM	13A DP SW. CONN UNIT/FLEX OUT	EACH	4	City Electrical Factors	30.000	£6.99	£27.96
Local	MISC		STRIP OUT AND SET UP	LOT	2		40.000	£3.17	£6.34
Special	MISC		20MM GALV CONDUIT	M	90		0.000	£2.75	£247.50
Catalogue	DRAKA UK	6491BS/2.5RED	2.5 (7/0.67) RED	M	900		80.000	£0.28	£252.00

- 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'.

The 'Copy Discount' dialog box is shown. It has a title bar 'Copy Discount' and a close button. The text inside says 'Selected supplier and discount values are 'City Electrical Factors' and '40.000%' respectively'. There are two sections: 'Copy Supplier/Discount' and 'Copy to parts'. In the 'Copy Supplier/Discount' section, the radio button for 'Copy both supplier text and disc%' is selected and circled. In the 'Copy to parts' section, the radio button for 'Copy to all parts in this list' is selected and circled. A 'Copy' button is at the bottom right.

Copy Supplier/Discount

- ☐ Copy supplier text (City Electrical Factors)
- ☐ Copy discount (40)
- ☒ Copy both supplier text and disc%

Copy to parts

- ☐ Next parts
- ☒ Copy to all parts in this list
- ☐ Copy to whole file

Copy

Electrika

HomeSoftwareCataloguesLocal DataKitsContactsQuotes

QuotesSearch QuotesHelpInfo@electrika.com

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

FilesProjectItemsActiveCostingSummaryReports

EditCutCopyPasteDeleteClipboardKitsCombineInsertBlank SpecialHeadingExcelExportExcelViewsMaterial Cost

3 C) SMALL POWERCopy DiscUpdate PricesLocateAdd To LocalAdd To Kit

	Source	Manuf	Cat Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
	Catalogue	MK	2949 WHI	13A 2GANG SWITCHSOCKET	EACH	8	City Electrical Factors	40,000	£7.58	£60.64
	Special	MK	K932 ALM	13A DP SW. CONN UNIT/FLEX OUT	EACH	4	City Electrical Factors	40,000	£5.99	£23.96
	Local	MISC		STRIP OUT AND SET UP	LOT	2	City Electrical Factors	40,000	£3.17	£6.34
	Special	MISC		20MM GALV CONDUIT	M	90	City Electrical Factors	40,000	£1.65	£148.50
	Catalogue	DRAKA UK	6491B5/2.5RED	2.5 (7/0.67) RED	M	900	City Electrical Factors	40,000	£0.83	£747.00

Catalogues (All)LocalKitsQuotes

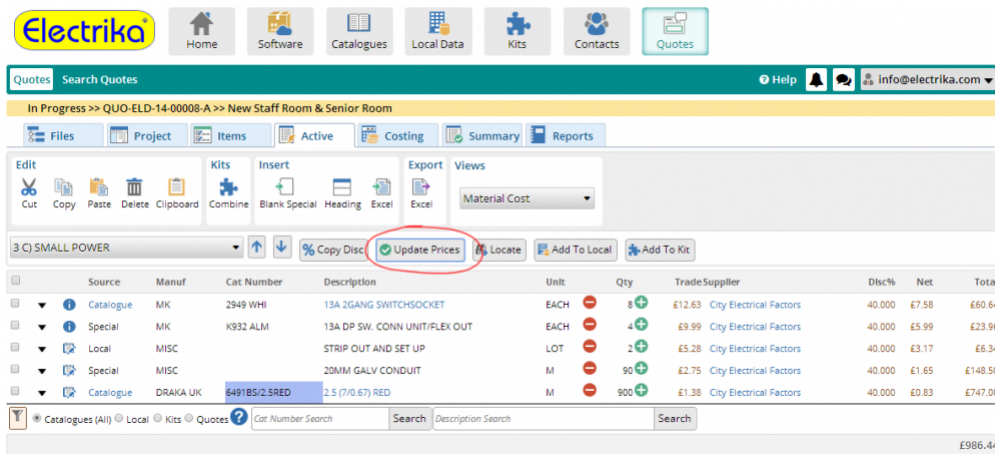
Enter Number SearchSearchDescription SearchSearch

£986.44

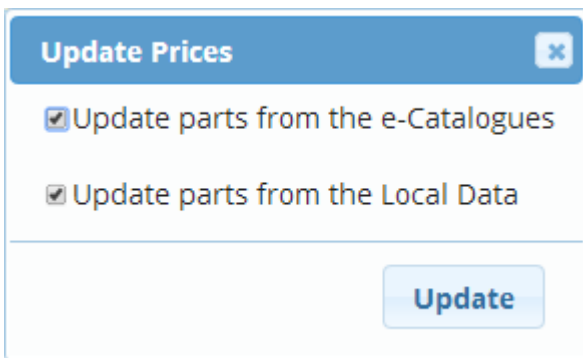
Updating prices for cat / local parts

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.

The screenshot shows the Electrika software interface. At the top, there's a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar and a 'Search Quotes' button. The main area displays a quote for 'QUO-ELD-14-00008-A' titled 'New Staff Room & Senior Room'. A table lists items with columns for Source, Manuf, Cat Number, Description, Unit, Qty, Trade Supplier, Disc%, Net, and Total. The item 'K23476BSSW' (1G SWITCH TRANSMITTER - ASPECT) is highlighted in blue. A red circle highlights the 'Locate' button in the toolbar above the table.

Source	Manuf	Cat Number	Description	Unit	Qty	Trade Supplier	Disc%	Net	Total
Catalogue	MK	2949 WHI	13A 2GANG SWITCHSOCKET	EACH	8	£12.63 City Electrical Factors	40.000	£7.58	£60.64
Special	MK	K932 ALM	13A DP SW. CONN UNIT/FLEX OUT	EACH	4	£9.99 City Electrical Factors	40.000	£5.99	£23.96
Catalogue	MK	K23476BSSW	1G SWITCH TRANSMITTER - ASPECT	EACH	1	£125.58	0.000	£125.58	£125.58
Local	MISC		STRIP OUT AND SET UP	LOT	2	£5.28 City Electrical Factors	40.000	£3.17	£6.34
Special	MISC		20MM GALV CONDUIT	M	90	£2.75 City Electrical Factors	40.000	£1.65	£148.50
Catalogue	DRAKA UK	6491BS/2.5RED	2.5 (7/0.67) RED	M	900	£1.38 City Electrical Factors	40.000	£0.83	£747.00

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

The screenshot shows the Electrika software interface after clicking the 'Locate' button. The top navigation bar is the same. Below it, there's a search bar and a 'Search' button. The main area displays a list of manufacturers and their products. The 'Locate' button is highlighted in a red circle. The list shows various transmitters and their details.

Cat Number	Description	Pack	Unit	Trade	Disc%	Net	Hours
1 Channel Transmitters - White Insert							
K23476BSSW	1G SWITCH TRANSMITTER - ASPECT	1	EACH	£125.58	0.00	£125.58	0.000
K23476PCW	1G SWITCH TRANSMITTER - ASPECT	1	EACH	£138.70	0.00	£138.70	0.000
K23476WHW	1G SWITCH TRANSMITTER - ASPECT	1	EACH	£124.10	0.00	£124.10	0.000
K23476BRW	1G SWITCH TRANSMITTER - ASPECT	1	EACH	£147.45	0.00	£147.45	0.000
1 Channel Transmitters - Black Insert							
K23476BSSB	1G SWITCH TRANSMITTER - ASPECT	1	EACH	£125.58	0.00	£125.58	0.000
K23476PCB	1G SWITCH TRANSMITTER - ASPECT	1	EACH	£138.70	0.00	£138.70	0.000
K23476BRB	1G SWITCH TRANSMITTER - ASPECT	1	EACH	£147.45	0.00	£147.45	0.000
2 Channel Transmitters - White Insert							
K23477BSSW	2G SWITCH TRANSMITTER - ASPECT	1	EACH	£134.32	0.00	£134.32	0.000
K23477PCW	2G SWITCH TRANSMITTER - ASPECT	1	EACH	£141.62	0.00	£141.62	0.000
K23477WHW	2G SWITCH TRANSMITTER - ASPECT	1	EACH	£130.39	0.00	£130.39	0.000
K23477BRW	2G SWITCH TRANSMITTER - ASPECT	1	EACH	£154.75	0.00	£154.75	0.000
2 Channel Transmitters - Black Insert							
K23477BSSB	2G SWITCH TRANSMITTER - ASPECT	1	EACH	£134.32	0.00	£134.32	0.000
K23477PCB	2G SWITCH TRANSMITTER - ASPECT	1	EACH	£141.62	0.00	£141.62	0.000
K23477BRB	2G SWITCH TRANSMITTER - ASPECT	1	EACH	£154.75	0.00	£154.75	0.000

Your local database

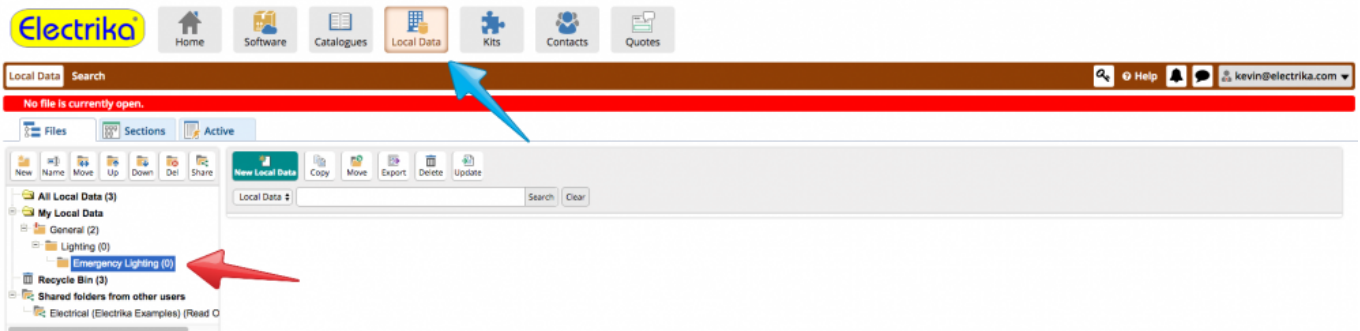
Although the Electrika product catalogue is fairly comprehensive, you may many reasons want to build your own product database. You can do this in Electrika by creating a local database and either adding parts manually or by importing from excel.

- [How to create a local database](#)
- [Import from excel into a local database](#)

How to create a local database

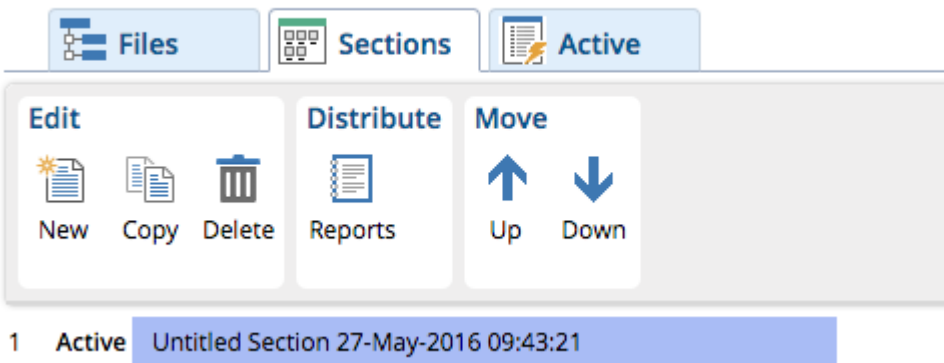
How do I create a local database?

- 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



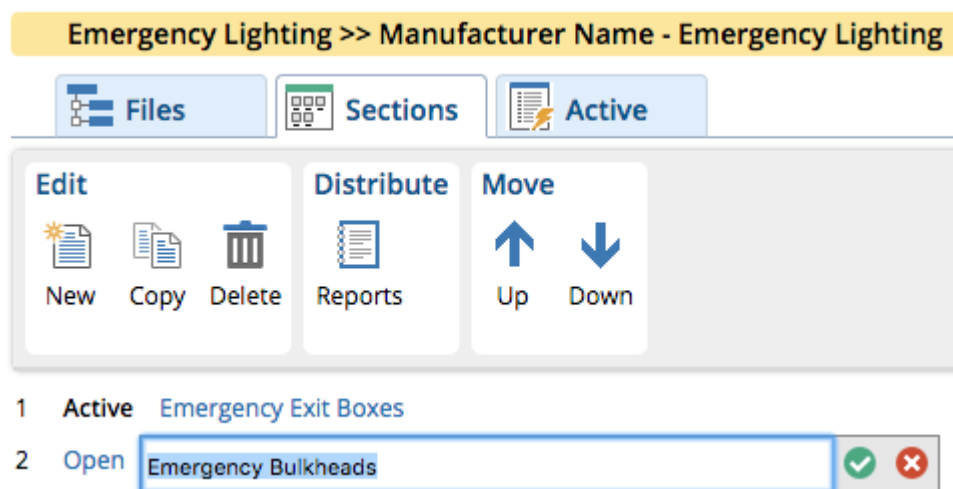
- With the preferred folder selected click the “New Local Data” button and then give it a name, e.g., “Manufacturer Name – Emergency Lighting.”

Emergency Lighting >> 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.



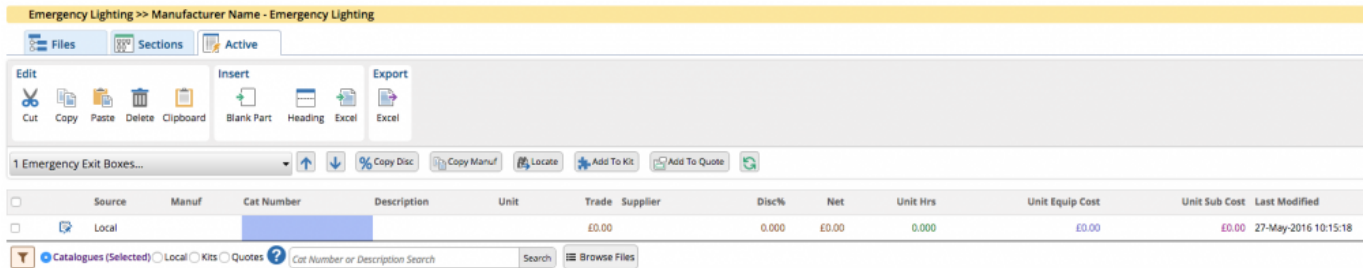
- Now either click the “Open” or “Active” button to start adding parts to a section.

[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.

Import parts from Excel

Please choose an Excel file then click 'Upload'

Choose File

No file chosen

Upload

- Then map the excel fields to the Electrika fields.

Map Columns ✕

Columns in your file	Columns in Electrika
Please select / Not Available	➡ Manufacturer
Please select / Not Available	➡ Cat Number
Please select / Not Available	➡ Description
Please select / Not Available	➡ Unit
Please select / Not Available	➡ Trade Price
Please select / Not Available	➡ Discount
Please select / Not Available	➡ Unit Hours
Please select / Not Available	➡ Equipment
Please select / Not Available	➡ Subcontract

Import

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.

The screenshot shows the Electrika e-Catalogue interface. At the top, there's a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar with a dropdown menu for 'Using discounts and install times from:' set to 'info@electrika.com'. A breadcrumb trail reads 'Manufacturers >> Havells >> MCCB Panelboards 400A >> Incoming'. The main table lists various products under categories like 'Incoming Metering', 'Outgoing Metering', 'Cable extension boxes', and 'Quikwire Accessories'. The columns are: Cat Number, Description, Pack, Unit, Trade, Disc%, Net, and Hours. In the first row, 'PSPB400MP', the 'Disc%' and 'Hours' values are circled in red. Each row also has links for 'Catalogue Page' and 'Tech Data & Dim'.

Cat Number	Description	Pack	Unit	Trade	Disc%	Net	Hours
Incoming Metering							
PSPB400MP	400A QuikWire Incoming Meter Pack	1	EACH	£770.17	0.00	£770.17	0.000
PSPB400SW	400A Panelboard QuikWire Incoming Meter and CT kit	1	EACH	£711.11	0.00	£711.11	0.000
Outgoing Metering							
PSPBL160SW	160A Panelboard QuikWire Outgoing Meter and CT kit	1	EACH	£570.00	0.00	£570.00	0.000
Cable extension boxes - side mounted for outgoing metering (hinged door)							
PSPB40EXM6	Cable extension box - outgoing metering - to fit panelboard PSPB406	1	EACH	£323.57	0.00	£323.57	0.000
PSPB40EXM12	Cable extension box - outgoing metering - to fit panelboard PSPB4012	1	EACH	£378.90	0.00	£378.90	0.000
PSPB40EXM18	Cable extension box - outgoing metering - to fit panelboard PSPB4018	1	EACH	£396.19	0.00	£396.19	0.000
Cable extension boxes - side mounted (standard)							
PSPB40EX6	Cable extension box - standard - to fit panelboard PSPB406	1	EACH	£218.93	0.00	£218.93	0.000
PSPB40EX12	Cable extension box - standard - to fit panelboard PSPB4012	1	EACH	£249.23	0.00	£249.23	0.000
PSPB40EX18	Cable extension box - standard - to fit panelboard PSPB4018	1	EACH	£269.18	0.00	£269.18	0.000
Quikwire Accessories							
PSPBSW3ME	Meter Extension Loom to bypass 3 meters (0.9m)	1	EACH	£56.99	0.00	£56.99	0.000
PSPBSW5ME	Meter Extension Loom to bypass 5 meters (1.2m)	1	EACH	£56.99	0.00	£56.99	0.000
PSPBSWCK	QuikWire Spare Connector Kit	1	EACH	£18.30	0.00	£18.30	0.000

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

Discount setup

Discount for PSPBS400MP >> 400A QuikWire Incoming Meter Pack

Discount

How do you wish to apply the discount?

☒ Apply to this part only

☐ Apply to this part and to the next parts

☐ Apply to all parts with Sub Index: Incoming

☐ Apply to all parts with Main Index: MCCB Panelboards 400A

IMPORTANT: Discounts are assigned by Cat Number.
Parts with the same Cat Number will get the same discount even if they are not in the above groups.

Apply

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

Install time setup

Install time for PSPBS400MP >> 400A QuikWire Incoming Meter Pack

Install Hours

Install Minutes

How do you wish to apply the install times?

☒ Apply to this part only

☐ Apply to this part and to the next parts

☐ Apply to all parts with Sub Index: Incoming

☐ Apply to all parts with Main Index: MCCB Panelboards 400A

IMPORTANT: Install times are assigned by Cat Number.
Parts with the same Cat Number will get the same install time even if they are not in the above groups.

Apply

- 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 certain number of parts, all the part in the sub index or all the parts in the main index.

Discount setup

Discount for PSPBS400MP >> 400A QuikWire Incoming Meter Pack

Discount 20

How do you wish to apply the discount?

- Apply to this part only
- Apply to this part and to the next 3 parts
- Apply to all parts with Sub Index: Incoming
- Apply to all parts with Main Index: MCCB Panelboards 400A

IMPORTANT: Discounts are assigned by Cat Number.
Parts with the same Cat Number will get the same discount even if they are not in the above groups.

Apply

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Using discounts and install times from: info@electrika.com
Share Install Times & Discounts

Manufacturers >> Havelis >> MCCB Panelboards 400A >> Incoming

Cat Number	Description	Pack	Unit	Trade	Disc%	Net	Hours		
Incoming Metering									
PSPBS400MP	400A QuikWire Incoming Meter Pack	1	EACH	£770.17	20.00	£616.14	0.000		
PSPBS400SW	400A Panelboard QuikWire Incoming Meter and CT kit	1	EACH	£711.11	20.00	£568.89	0.000		
Outgoing Metering									
PSPBL160SW	160A Panelboard QuikWire Outgoing Meter and CT kit	1	EACH	£570.00	20.00	£456.00	0.000		
Cable extension boxes - side mounted for outgoing metering (hinged door)									
PSPB40EXM6	Cable extension box - outgoing metering - to fit panelboard PSPB406	1	EACH	£323.57	20.00	£258.86	0.000		
PSPB40EXM12	Cable extension box - outgoing metering - to fit panelboard PSPB4012	1	EACH	£378.90	0.00	£378.90	0.000		
PSPB40EXM18	Cable extension box - outgoing metering - to fit panelboard PSPB4018	1	EACH	£396.19	0.00	£396.19	0.000		
Cable extension boxes - side mounted (standard)									
PSPB40EX6	Cable extension box - standard - to fit panelboard PSPB406	1	EACH	£218.93	0.00	£218.93	0.000		
PSPB40EX12	Cable extension box - standard - to fit panelboard PSPB4012	1	EACH	£249.23	0.00	£249.23	0.000		
PSPB40EX18	Cable extension box - standard - to fit panelboard PSPB4018	1	EACH	£269.18	0.00	£269.18	0.000		
QuikWire Accessories									
PSPBSW3ME	Meter Extension Loom to bypass 3 meters (0.9m)	1	EACH	£56.99	0.00	£56.99	0.000		
PSPBSW5ME	Meter Extension Loom to bypass 5 meters (1.2m)	1	EACH	£56.99	0.00	£56.99	0.000		
PSPBSWCK	QuikWire Spare Connector Kit	1	EACH	£18.30	0.00	£18.30	0.000		

Sharing install times and discounts

How do I share install times and discounts?

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

The screenshot shows the Electrika web application interface. At the top, there is a navigation bar with the Electrika logo and several menu items: Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar with the text 'Search Cat Number Or Description' and a search button. To the right of the search bar are links for 'Only this manufacturer', 'Add To Local', 'Add To Kit', and 'Add To Quote'. Below the search bar, there is a dropdown menu for 'Using discounts and install times from:' with the value 'info@electrika.com'. The 'Share Install Times & Discounts' button is highlighted with a red circle. Below this, there is a table of products with columns: Cat Number, Description, Pack, Unit, Trade, Disc%, Net, and Hours. The table lists various products including 'Incoming Metering', 'Outgoing Metering', 'Cable extension boxes', and 'Quikwire Accessories'.

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

The screenshot shows a dialog box titled 'User to share with'. It has a close button (X) in the top right corner. Below the title, there is a text input field containing the email address 'john@electrika.com'. To the right of the input field is a button labeled 'Share', which is highlighted with a red circle. Below the input field, there is a section titled 'User Permission' with a text area that says 'Not shared with any users'.

- 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 permission by clicking on the 'Can Edit' link, which allows you to toggle between 'Can Edit' and 'Can Read'

User to share with

Type in Electrika Username (Email)

Share

User Permission

john@electrika.com

Can Edit

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.

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john@electrika.com

Search Cat Number Or Description

Search

Only this manufacturer

Add To Local

Add To Kit

Add To Quote

Using discounts and install times from:

john@electrika.com

john@electrika.com

info@electrika.com

Share Install Times & Discounts

Manufacturers >> Havells >> MCCB Panelboards 400A >> Incoming

Cat Number	Description	Pack	Unit	Trade	Disc%	Net	Hours		
Incoming Metering									
PSPB5400MP	400A QuikWire Incoming Meter Pack	1	EACH	£770.17	0.00	£770.17	0.000		
PSPB5400SW	400A Panelboard QuikWire Incoming Meter and CT kit	1	EACH	£711.11	0.00	£711.11	0.000		
Outgoing Metering									
PSPBL160SW	160A Panelboard QuikWire Outgoing Meter and CT kit	1	EACH	£570.00	0.00	£570.00	0.000		
Cable extension boxes - side mounted for outgoing metering (hinged door)									
PSPB40EXM6	Cable extension box - outgoing metering - to fit panelboard PSPB406	1	EACH	£323.57	0.00	£323.57	0.000		
PSPB40EXM12	Cable extension box - outgoing metering - to fit panelboard PSPB4012	1	EACH	£378.90	0.00	£378.90	0.000		
PSPB40EXM18	Cable extension box - outgoing metering - to fit panelboard PSPB4018	1	EACH	£396.19	0.00	£396.19	0.000		
Cable extension boxes - side mounted (standard)									
PSPB40EX6	Cable extension box - standard - to fit panelboard PSPB406	1	EACH	£218.93	0.00	£218.93	0.000		
PSPB40EX12	Cable extension box - standard - to fit panelboard PSPB4012	1	EACH	£249.23	0.00	£249.23	0.000		
PSPB40EX18	Cable extension box - standard - to fit panelboard PSPB4018	1	EACH	£269.18	0.00	£269.18	0.000		
QuikWire Accessories									
PSPBSW3ME	Meter Extension Loom to bypass 3 meters (0.9m)	1	EACH	£56.99	0.00	£56.99	0.000		
PSPBSW5ME	Meter Extension Loom to bypass 5 meters (1.2m)	1	EACH	£56.99	0.00	£56.99	0.000		
PSPBSWCK	QuikWire Spare Connector Kit	1	EACH	£18.30	0.00	£18.30	0.000		

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

Change of user profile for discounts and install times

This will change the user profile for setting discounts and install times.

Any changes that you make to the discounts and install times will be saved to this user's profile.

All default discounts and install times will also come from this profile.

Continue?

OK

Cancel

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

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Search Cat Number Or Description Search Only this manufacturer Add To Local Add To Kit Add To Quote

Using discounts and install times from: info@electrika.com

Share Install Times & Discounts

Signed in user: john@electrika.com

Using discounts & install times of 'info@electrika.com'

Manufacturers >> Havells >> MCCB Panelboards 400A >> Incoming

Cat Number	Description	Pack	Unit	Trade	Disc%	Net	Hours		
Incoming Metering									
PSPB5400MP	400A QuikWire Incoming Meter Pack	1	EACH	£770.17	20.00	£616.14	0.000	i	Catalogue Page Tech Data & Dim
PSPB5400SW	400A Panelboard QuikWire Incoming Meter and CT kit	1	EACH	£711.11	20.00	£568.89	0.000	i	Catalogue Page Tech Data & Dim
Outgoing Metering									
PSPBL160SW	160A Panelboard QuikWire Outgoing Meter and CT kit	1	EACH	£570.00	20.00	£456.00	0.000	i	Catalogue Page Tech Data & Dim
Cable extension boxes - side mounted for outgoing metering (hinged door)									
PSPB40EXM6	Cable extension box - outgoing metering - to fit panelboard PSPB406	1	EACH	£323.57	20.00	£258.86	0.000	i	Catalogue Page Tech Data & Dim
PSPB40EXM12	Cable extension box - outgoing metering - to fit panelboard PSPB4012	1	EACH	£378.90	0.00	£378.90	0.000	i	Catalogue Page Tech Data & Dim
PSPB40EXM18	Cable extension box - outgoing metering - to fit panelboard PSPB4018	1	EACH	£396.19	0.00	£396.19	0.000	i	Catalogue Page Tech Data & Dim
Cable extension boxes - side mounted (standard)									
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PSPB40EX12	Cable extension box - standard - to fit panelboard PSPB4012	1	EACH	£249.23	0.00	£249.23	0.000	i	Catalogue Page Tech Data & Dim
PSPB40EX18	Cable extension box - standard - to fit panelboard PSPB4018	1	EACH	£269.18	0.00	£269.18	0.000	i	Catalogue Page Tech Data & Dim
Quikwire Accessories									
PSPB5W3ME	Meter Extension Loom to bypass 3 meters (0.9m)	1	EACH	£56.99	0.00	£56.99	0.000	i	Catalogue Page Tech Data & Dim
PSPB5W5ME	Meter Extension Loom to bypass 5 meters (1.2m)	1	EACH	£56.99	0.00	£56.99	0.000	i	Catalogue Page Tech Data & Dim
PSPB5WCK	QuikWire Spare Connector Kit	1	EACH	£18.30	0.00	£18.30	0.000	i	Catalogue Page Tech Data & Dim

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.


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▶ Material Cost

£10,381.62

Material Overhead

£843.04

Material Profit

£588.56

▶ Labour Cost

£11,291.82

Labour Overhead

£321.61

Labour Profit

£512.22

Plant & Equipment Cost

£2,100.00

Plant & Equipment Overhead

£105.00

Plant & Equipment Profit

£147.00

Subcontract Cost

£3,250.00

Subcontract Overhead

£390.00

Subcontract Profit

£276.30

Spread Costs ?

▶ Preliminaries

On Mat: £1,150.00

On Lab: £150.00

£1,300.00

▶ Extras

On Mat: £136.50

On Lab: £136.50

£273.00

▶ Main Contractors Disc @ 2.50% ?

On Mat: £407.44

On Lab: £407.44

£814.88

Subtotal

£32,595.05

Adjustment ?

£3.07

Tender Sell

£32,598.12

▶ Provisional Sums

£1,472.80

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.

The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar labeled 'Search Quotes'. The main area displays the project path: 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. Below the path are tabs for Files, Project, Items, Active, Costing, Summary, and Reports. The 'Material Cost' section is expanded, showing a total cost of £10,381.62. A table lists various product sections and their corresponding costs.

Product Section	Cost
	£41.39
6491BS Sing Core OHLS Ins Non Shthd	£1,042.32
Albany Plus	£18.17
Circuit Breaker Systems	£292.99
Echo - Wireless Self Powered Switches	£125.58
Heavy Duty Return Flange Cable Tray	£169.00
Industrial Switch & Fusegear	£1,739.48
Logic Plus	£30.95
Metalclad	£30.62
Miscellaneous Items	£0.00
Other Wiring Devices	£166.08
SPECIALS	£6,341.88
Std Single Comp Galv Cbl Trunking	£288.00
SUNDRIES	£50.00
SwiftRack	£25.56
TRAY	£19.60
	£10,381.62

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.



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► Material Cost
£10,381.62

Material Overhead
£843.04

Material Profit
£588.56

▼ Labour Cost
£11,291.82

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 included 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.

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▶ Material Cost

£10,381.62

Material Overhead

£843.04

Material Profit

£588.56

▶ Labour Cost

£13,046.57

Labour Overhead

£321.61

Labour Profit

£512.22

Plant & Equipment Cost

£2,100.00

Plant & Equipment Overhead

£105.00

Plant & Equipment Profit

£147.00

Subcontract Cost

£3,250.00

Subcontract Overhead

£390.00

Subcontract Profit

£276.30

Spread Costs ?

▶ Preliminaries

On Mat: £650.00

On Lab: £650.00

£1,300.00

▶ Extras

On Mat: £136.50

On Lab: £136.50

£273.00

▶ Main Contractors Disc @ 2.50% ?

On Mat: £429.93

On Lab: £429.93

£859.87

Sub-Total

£34,394.79

Adjustment ?

-£4.24

Tender Sell

£34,390.55

▶ Provisional Sums

£1,472.80

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.

▼ Preliminaries

On Mat: £650.00 On Lab: £650.00 £1,300.00

 Add New
  Save As Default

Item	Qty	Unit	Total	Include On Mat	Include On Lab
 Plant Hire	1	£100.00	£100.00	✓	✓
 Scaffolding Hire	1	£1,000.00	£1,000.00	✓	✓
 Protective Clothing	1	£50.00	£50.00	✓	✓
 Temporary Lighting	1	£150.00	£150.00	✓	✓
			£1,300.00		

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

Add New

Item

Quantity


Unit





☒ Spread On Material

☒ Spread On Labour

Apply

How do I edit a preliminary or extra?

- To edit the preliminary or extra click on .

▼ Preliminaries					
			On Mat: £650.00	On Lab: £650.00	£1,300.00
<div> <div>Add New</div> <div>Save As Default</div> </div>					
Item	Qty	Unit	Total	Include On Mat	Include On Lab
 Plant Hire	1	£100.00	£100.00	✓	✓
 <u>Scaffolding Hire</u>	1	<u>£1,000.00</u>	<u>£1,000.00</u>	<u>✓</u>	<u>✓</u>
 Protective Clothing	1	£50.00	£50.00	✓	✓
 Temporary Lighting	1	£150.00	£150.00	✓	✓
			£1,300.00		

- 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.

Edit

Item

Scaffolding Hire

Quantity

1

Unit Price


£1,000.00





☒ Spread On Material

☒ Spread On Labour



Apply

How do I delete a preliminary or extra?

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

▼ Preliminaries					
			On Mat: £650.00	On Lab: £650.00	£1,300.00
<div> Add New Save As Default </div>					
Item	Qty	Unit	Total	Include On Mat	Include On Lab
 Plant Hire	1	£100.00	£100.00	✓	✓
 Scaffolding Hire	1	£1,000.00	£1,000.00	✓	✓
 Protective Clothing	1	£50.00	£50.00	✓	✓
 Temporary Lighting	1	£150.00	£150.00	✓	✓
			£1,300.00		

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 .

▼ Preliminaries					
			On Mat: £1,150.00	On Lab: £150.00	£1,300.00
<div> Add New Save As Default </div>					
Item	Qty	Unit	Total	Include On Mat	Include On Lab
Plant Hire	1	£100.00	£100.00	✓	✓
Scaffolding Hire	1	£1,000.00	£1,000.00	✓	✗
Protective Clothing	1	£50.00	£50.00	✓	✓
Temporary Lighting	1	£150.00	£150.00	✓	✓
			£1,300.00		

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

Edit

Item

Scaffolding Hire

Quantity

1

Unit Price

£1,000.00

☒ Spread On Material

☒ Spread On Labour

Apply

- 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.


▼ Preliminaries




On Mat: £1,150.00

On Lab: £150.00

£1,300.00

 Add New

 Save As Default

Item	Qty	Unit	Total	Include On Mat	Include On Lab
 Plant Hire	1	£100.00	£100.00	✓	✓
 Scaffolding Hire	1	£1,000.00	£1,000.00	✓	✗
 Protective Clothing	1	£50.00	£50.00	✓	✓
 Temporary Lighting	1	£150.00	£150.00	✓	✓
			£1,300.00		



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.

▼ Main Contractors Disc @ 2.50% ?

On Mat: £407.44 On Lab: £407.44 £814.88

Main Contractors Discount at 2.50%

Save As Default

☒ Include On Material

☒ Include On Labour

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

Edit Main Contractors Discount

Main Contractors Discount

2.50 %

Apply

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.

▼ Main Contractors Disc @ 2.50% ?

On Mat: £407.44 On Lab: £407.44 £814.88

Main Contractors Discount at 2.50%

Save As Default

☒ Include On Material

☒ Include On Labour


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.

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Quotes Search Quotes			
In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room			
▶ Material Cost			£10,381.62
Material Overhead			£843.04
Material Profit			£588.56
▶ Labour Cost			£11,291.82
Labour Overhead			£321.61
Labour Profit			£512.22
Plant & Equipment Cost			£2,100.00
Plant & Equipment Overhead			£105.00
Plant & Equipment Profit			£147.00
Subcontract Cost			£3,250.00
Subcontract Overhead			£390.00
Subcontract Profit			£276.30
Spread Costs ?			
▶ Preliminaries	On Mat: £1,150.00	On Lab: £150.00	£1,300.00
▶ Extras	On Mat: £136.50	On Lab: £136.50	£273.00
▶ Main Contractors Disc @ 2.50% ?	On Mat: £407.44	On Lab: £407.44	£814.88
Subtotal			£32,595.05
Adjustment ?			£3.07
Tender Sell			£32,598.12
▶ Provisional Sums			£1,472.80

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.

▼ Provisional Sums				£1,630.00
<div> Add New  Save As Default</div>				
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	

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](#)
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Organizing reports

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- [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.

The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar labeled 'Quotes' and 'Search Quotes'. A yellow banner indicates the current project: 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. Below the banner is a row of tabs: Files, Project, Items, Active, Costing, Summary, and Reports. Under the 'Reports' tab, there are three sub-tabs: Options, Preview, and Email. The 'Options' sub-tab is active, showing two radio buttons: 'Customer' (selected) and 'Internal user'. Below these are descriptions: 'Includes Cover page and Terms & Conditions and the email page gets filled in with the contact email and quotation message' for Customer, and 'Leaves out Cover page and Terms & Conditions and the email page is blank' for Internal user. Below this is the 'Select report type' section, which has four columns: 'Sell prices', 'Cost Views', 'Sell Views', and 'Other'. Under 'Sell prices', 'Show Final Unit Sell & Total' is selected. Under 'Cost Views', 'Material Cost', 'Labour Cost', 'Mat & Lab Cost', 'Equipment Cost', and 'Subcontract Cost' are listed. Under 'Sell Views', 'Material Sell', 'Labour Sell', 'Mat & Lab Sell', 'Equipment Sell', and 'Subcontract Sell' are listed. Under 'Other', 'Bill Of Materials' and 'Labour Hours' are listed.

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.

The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar labeled 'Quotes' and 'Search Quotes'. The main content area is titled 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. Below the title bar, there are tabs for Files, Project, Items, Active, Costing, Summary, and Reports. Under the 'Items' tab, there are sub-tabs for Options, Preview, and Email. The 'Options' sub-tab is selected, showing the 'Who is the report for?' section. This section has two radio buttons: 'Customer' (selected) and 'Internal user'. Below this is the 'Select report type' section, which has four columns of radio buttons: 'Sell prices' (selected), 'Cost Views', 'Sell Views', and 'Other'. The 'Sell prices' column includes 'Show Final Unit Sell & Total' (selected) and 'Show Sell Price Buildup'. The 'Cost Views' column includes 'Material Cost', 'Labour Cost', 'Mat & Lab Cost', 'Equipment Cost', and 'Subcontract Cost'. The 'Sell Views' column includes 'Material Sell', 'Labour Sell', 'Mat & Lab Sell', 'Equipment Sell', and 'Subcontract Sell'. The 'Other' column includes 'Bill Of Materials' and 'Labour Hours'. Below this is the 'Select what to show' section, which has a heading 'Include the following pages in the report' and four checkboxes: 'Items List' (checked), 'Parts List' (checked), 'Provisional Sums' (unchecked), and 'Include Terms & Conditions' (unchecked). There is also a link 'Edit Terms & Conditions'. Below this is the 'Show' section, which has three checkboxes: 'Item prices' (checked), 'Part prices' (checked), and 'Optional Items & Parts' (checked). Below this is the 'Show Trade Prices / Discounts' section, which has two checkboxes: 'Trade' (checked) and 'Discount' (checked). Below this is the 'Page size' section, which has two radio buttons: 'A4' (selected) and 'Letter'. Below this is the 'Cover page' section, which has two checkboxes: 'Include cover page' (checked) and 'Show prices on cover page' (checked). The 'Include cover page' checkbox is highlighted with a red circle. To the right of these checkboxes are links for 'Site details', 'Sender information', 'Company logo', 'Company address', and 'Footer text'.

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

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

Electrika

Home Software Catalogues Local Data Kits Contacts Quotes

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 <input checked="" type="radio"/> Show Final Unit Sell & Total <input type="radio"/> Show Sell Price Buildup	Cost Views <input type="radio"/> Material Cost <input type="radio"/> Labour Cost <input type="radio"/> Mat & Lab Cost <input type="radio"/> Equipment Cost <input type="radio"/> Subcontract Cost	Sell Views <input type="radio"/> Material Sell <input type="radio"/> Labour Sell <input type="radio"/> Mat & Lab Sell <input type="radio"/> Equipment Sell <input type="radio"/> Subcontract Sell	Other <input type="radio"/> Bill Of Materials <input type="radio"/> Labour Hours
--	---	---	---

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](#)


How do I include or exclude the terms & conditions?


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





 Home


 Software

 Catalogues

 Local Data

 Kits

 Contacts

 Quotes

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

☒ Show Final Unit Sell & Total

☐ Show Sell Price Buildup

Cost Views

☐ Material Cost

☐ Labour Cost

☐ Mat & Lab Cost

☐ Equipment Cost

☐ Subcontract Cost

Sell Views

☐ Material Sell

☐ Labour Sell

☐ Mat & Lab Sell

☐ Equipment Sell

☐ Subcontract Sell

Other

☐ Bill Of Materials

☐ Labour Hours

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

Page 107 of 184

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.

Electrika Home Software Catalogues Local Data Kits Contacts Quotes

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 <input checked="" type="radio"/> Show Final Unit Sell & Total <input type="radio"/> Show Sell Price Buildup	Cost Views <input type="radio"/> Material Cost <input type="radio"/> Labour Cost <input type="radio"/> Mat & Lab Cost <input type="radio"/> Equipment Cost <input type="radio"/> Subcontract Cost	Sell Views <input type="radio"/> Material Sell <input type="radio"/> Labour Sell <input type="radio"/> Mat & Lab Sell <input type="radio"/> Equipment Sell <input type="radio"/> Subcontract Sell	Other <input type="radio"/> Bill Of Materials <input type="radio"/> Labour Hours
--	---	---	---

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](#) [Footer text](#)

[Sender information](#)

[Company logo](#)

[Company address](#)

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.

The screenshot shows the Electrika software interface. At the top is the 'Electrika' logo and a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar labeled 'Quotes' and 'Search Quotes'. A yellow banner indicates the current project: 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. A menu bar contains 'Files', 'Project', 'Items', 'Active', 'Costing', 'Summary', and 'Reports'. Below the menu bar are 'Options', 'Preview', and 'Email' buttons. The main content area is divided into sections: 'Who is the report for?' with radio buttons for 'Customer' (selected) and 'Internal user'; 'Select report type' with four columns of radio buttons for 'Sell prices', 'Cost Views', 'Sell Views', and 'Other'; 'Select what to show' with checkboxes for 'Include the following pages in the report' and 'Show Trade Prices / Discounts'; and 'Page size' with radio buttons for 'A4' (selected) and 'Letter'. The 'A4' radio button is circled in red.

Electrika

Home Software Catalogues Local Data Kits Contacts Quotes

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 <input checked="" type="radio"/> Show Final Unit Sell & Total <input type="radio"/> Show Sell Price Buildup	Cost Views <input type="radio"/> Material Cost <input type="radio"/> Labour Cost <input type="radio"/> Mat & Lab Cost <input type="radio"/> Equipment Cost <input type="radio"/> Subcontract Cost	Sell Views <input type="radio"/> Material Sell <input type="radio"/> Labour Sell <input type="radio"/> Mat & Lab Sell <input type="radio"/> Equipment Sell <input type="radio"/> Subcontract Sell	Other <input type="radio"/> Bill Of Materials <input type="radio"/> Labour Hours
--	---	---	---

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

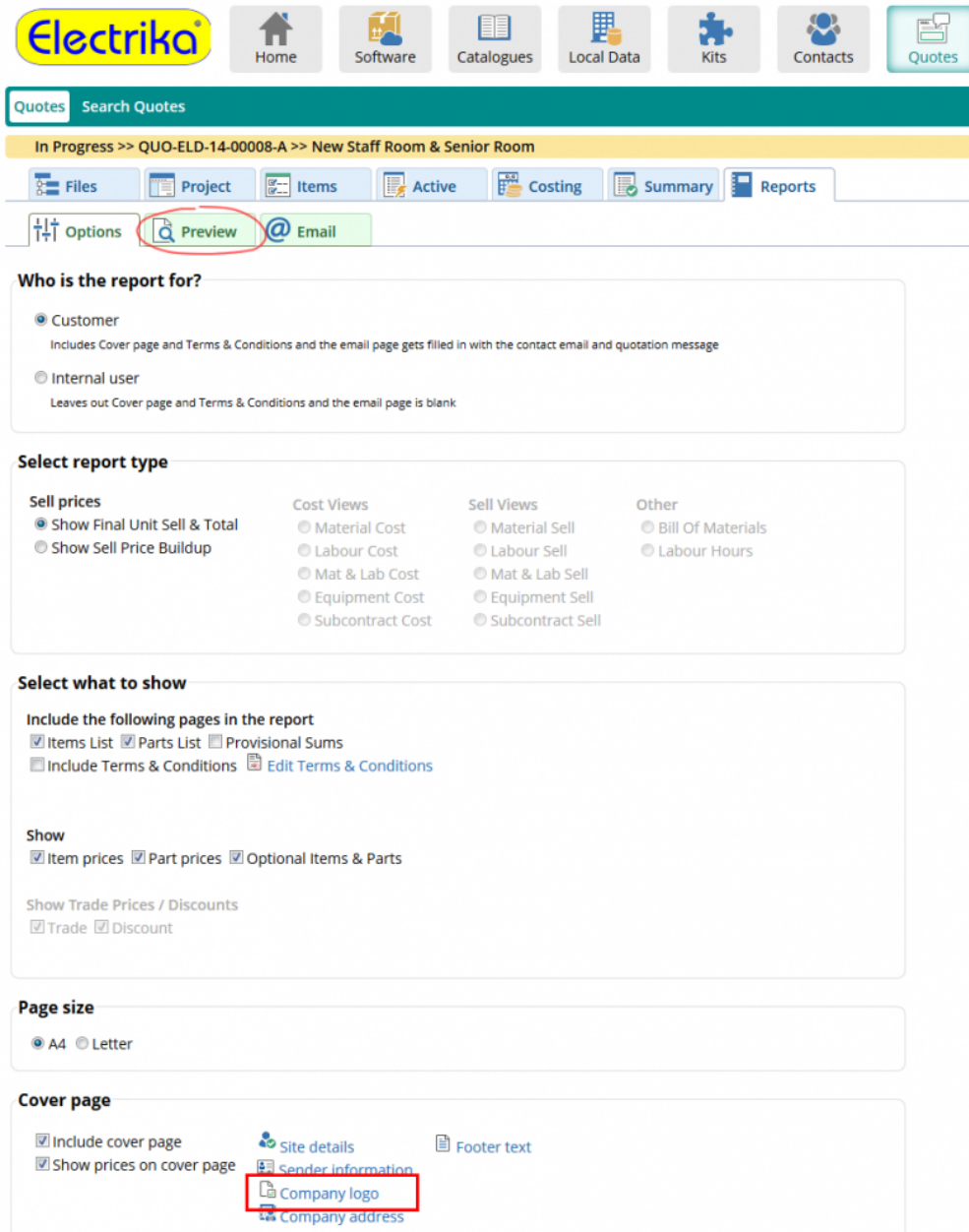
Show Trade Prices / Discounts
☒ Trade ☒ Discount

Page size
☒ A4 ☐ Letter

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



The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar labeled 'Search Quotes'. The main content area is titled 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. A toolbar contains icons for Files, Project, Items, Active, Costing, Summary, and Reports. Below the toolbar, there is a section for 'Options' with a 'Preview' tab selected and highlighted with a red circle. The 'Preview' tab shows a form for 'Who is the report for?' with radio buttons for 'Customer' (selected) and 'Internal user'. Below this is a 'Select report type' section with four columns of options: 'Sell prices' (Show Final Unit Sell & Total, Show Sell Price Buildup), 'Cost Views' (Material Cost, Labour Cost, Mat & Lab Cost, Equipment Cost, Subcontract Cost), 'Sell Views' (Material Sell, Labour Sell, Mat & Lab Sell, Equipment Sell, Subcontract Sell), and 'Other' (Bill Of Materials, Labour Hours). The 'Select what to show' section has checkboxes for 'Include the following pages in the report' (Items List, Parts List, Provisional Sums, Include Terms & Conditions) and 'Show' (Item prices, Part prices, Optional Items & Parts). There is also a 'Show Trade Prices / Discounts' section with checkboxes for 'Trade' and 'Discount'. The 'Page size' section has radio buttons for 'A4' (selected) and 'Letter'. The 'Cover page' section has checkboxes for 'Include cover page' and 'Show prices on cover page', and a list of links: 'Site details', 'Sender information', 'Company logo' (highlighted with a red box), and 'Company address'.

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

- Click on the 'Company address' link.

Electrika

Home Software Catalogues Local Data Kits Contacts Quotes

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 <input checked="" type="radio"/> Show Final Unit Sell & Total <input type="radio"/> Show Sell Price Buildup	Cost Views <input type="radio"/> Material Cost <input type="radio"/> Labour Cost <input type="radio"/> Mat & Lab Cost <input type="radio"/> Equipment Cost <input type="radio"/> Subcontract Cost	Sell Views <input type="radio"/> Material Sell <input type="radio"/> Labour Sell <input type="radio"/> Mat & Lab Sell <input type="radio"/> Equipment Sell <input type="radio"/> Subcontract Sell	Other <input type="radio"/> Bill Of Materials <input type="radio"/> Labour Hours
--	---	---	---

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](#)

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

Edit Company Address

A

B

I

U

1

2

3

GO

GO

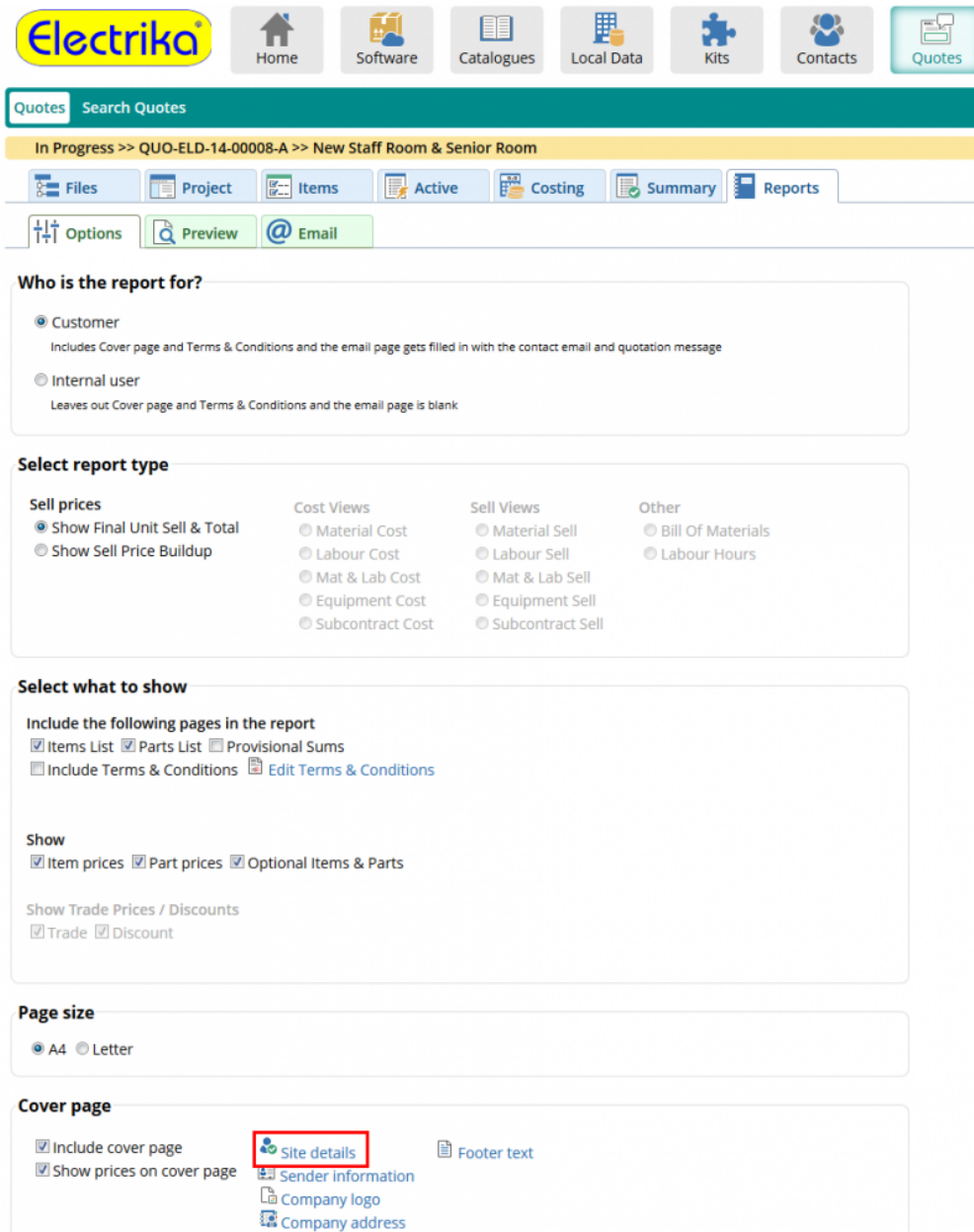
Electrika Ltd
Park Way House
Palatine Road
Northenden
Manchester
M22 4DB

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.



The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar labeled 'Quotes' and 'Search Quotes'. The main content area is titled 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. Below the title bar, there are tabs for Files, Project, Items, Active, Costing, Summary, and Reports. Under the 'Project' tab, there are sub-tabs for Options, Preview, and Email. The 'Options' sub-tab is selected, showing the 'Who is the report for?' section. This section has two radio buttons: 'Customer' (selected) and 'Internal user'. Below these are descriptions of what each option includes. The 'Select report type' section is also visible, showing various report types like 'Sell prices', 'Cost Views', 'Sell Views', and 'Other'. The 'Select what to show' section is partially visible, showing checkboxes for 'Include the following pages in the report' and 'Show' options. The 'Page size' section shows 'A4' selected. The 'Cover page' section is partially visible, showing checkboxes for 'Include cover page' and 'Show prices on cover page', and a list of items to include on the cover page, with 'Site details' highlighted by a red box.

Electrika

Home Software Catalogues Local Data Kits Contacts Quotes

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

- ☒ Show Final Unit Sell & Total
- ☐ Show Sell Price Buildup

Cost Views

- ☐ Material Cost
- ☐ Labour Cost
- ☐ Mat & Lab Cost
- ☐ Equipment Cost
- ☐ Subcontract Cost

Sell Views

- ☐ Material Sell
- ☐ Labour Sell
- ☐ Mat & Lab Sell
- ☐ Equipment Sell
- ☐ Subcontract Sell

Other

- ☐ Bill Of Materials
- ☐ Labour Hours

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


- 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.

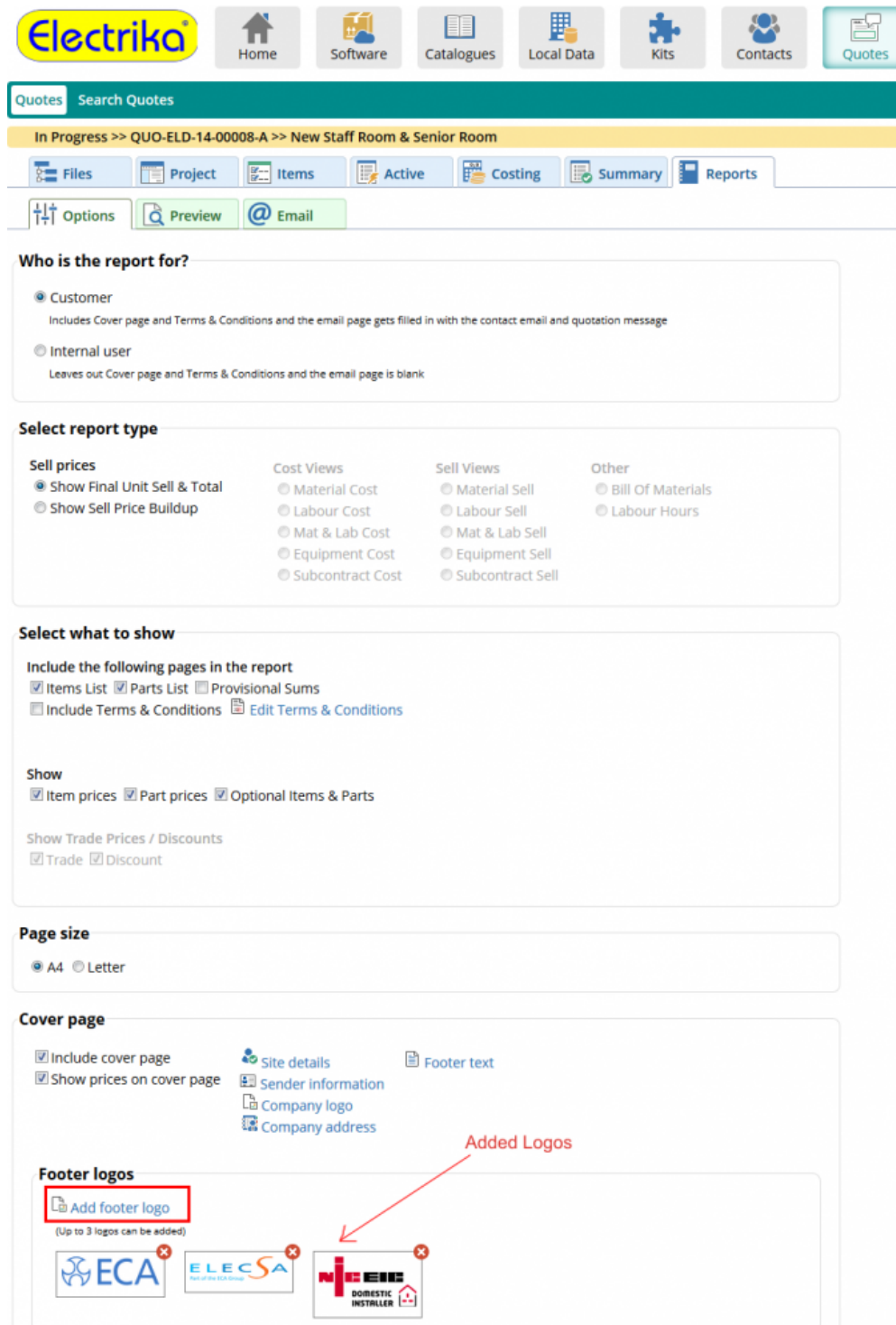
Select a company as site

	Folder	Company Name	Address	Tel
<input checked="" type="radio"/>  	Customers	Electrika Ltd	Northenden	+44 (0)161 945 5124
<input type="radio"/>  	General	HILLMAN & SONS LTD		0208 333 2444
<input type="radio"/>  	Suppliers	City Electrical Factors		

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.



The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar labeled 'Quotes' and 'Search Quotes'. The main content area is titled 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. Below the title bar, there are tabs for Files, Project, Items, Active, Costing, Summary, and Reports. A sub-menu bar includes Options, Preview, and Email. The 'Who is the report for?' section has two radio buttons: 'Customer' (selected) and 'Internal user'. The 'Select report type' section has four columns of radio buttons: 'Sell prices' (Show Final Unit Sell & Total, Show Sell Price Buildup), 'Cost Views' (Material Cost, Labour Cost, Mat & Lab Cost, Equipment Cost, Subcontract Cost), 'Sell Views' (Material Sell, Labour Sell, Mat & Lab Sell, Equipment Sell, Subcontract Sell), and 'Other' (Bill Of Materials, Labour Hours). The 'Select what to show' section has checkboxes for 'Items List', 'Parts List', 'Provisional Sums', 'Include Terms & Conditions', and 'Edit Terms & Conditions'. The 'Show' section has checkboxes for 'Item prices', 'Part prices', and 'Optional Items & Parts'. The 'Page size' section has radio buttons for 'A4' (selected) and 'Letter'. The 'Cover page' section has checkboxes for 'Include cover page' and 'Show prices on cover page', and links for 'Site details', 'Sender information', 'Company logo', and 'Company address'. The 'Footer logos' section has a link 'Add footer logo' (highlighted with a red box) and a note '(Up to 3 logos can be added)'. Below this, there are three logos: ECA, ELECSA, and DOMESTIC INSTALLER. A red arrow points to the 'Added Logos' section, which contains the three logos.

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

- Click on the 'Footer text' links.

The screenshot shows the Electrika software interface. At the top is the Electrika logo and a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar and a status bar indicating 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. A menu bar contains tabs for Files, Project, Items, Active, Costing, Summary, and Reports. Below the menu bar are buttons for Options, Preview, and Email.

The main content area is titled 'Who is the report for?' and has two radio button options:

- ☒ 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

Below this is the 'Select report type' section, which has four columns of radio button options:

- Sell prices:**
 - ☒ Show Final Unit Sell & Total
 - ☐ Show Sell Price Buildup
- Cost Views:**
 - ☐ Material Cost
 - ☐ Labour Cost
 - ☐ Mat & Lab Cost
 - ☐ Equipment Cost
 - ☐ Subcontract Cost
- Sell Views:**
 - ☐ Material Sell
 - ☐ Labour Sell
 - ☐ Mat & Lab Sell
 - ☐ Equipment Sell
 - ☐ Subcontract Sell
- Other:**
 - ☐ Bill Of Materials
 - ☐ Labour Hours

Next is the 'Select what to show' section, which includes:

- 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

Below this is the 'Page size' section with two radio button options:

- ☒ A4
- ☐ Letter

The 'Cover page' section has two checked checkboxes:

- ☒ Include cover page
- ☒ Show prices on cover page

 To the right of these checkboxes are links for:

- [Site details](#)
- [Sender information](#)
- [Company logo](#)
- [Company address](#)

 The 'Footer text' link is circled in red.

Finally, the 'Footer logos' section has:

- [Add footer logo](#) (Up to 3 logos can be added)
- Three logos: ECA, ELECSA, and NICEIC DOMESTIC INSTALLER.

Customizing the email signature

How do I add an email signature?

- Click on the 'Email Signature' link.

Electrika Home Software Catalogues Local Data Kits Contacts Quotes

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
☒ Show Final Unit Sell & Total
☐ Show Sell Price Buildup

Cost Views
☐ Material Cost
☐ Labour Cost
☐ Mat & Lab Cost
☐ Equipment Cost
☐ Subcontract Cost

Sell Views
☐ Material Sell
☐ Labour Sell
☐ Mat & Lab Sell
☐ Equipment Sell
☐ Subcontract Sell

Other
☐ Bill Of Materials
☐ Labour Hours

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)

Email Settings

[Email signature](#)

Email footer logos

[Add footer logo](#)
(Up to 3 logos can be added)

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



Edit Email Signature [X]


Rich text editor toolbar: Font color, Bold, Italic, Underline, Bulleted list, Numbered list, Indent, Outdent, Link, Unlink, Image.

Name: John Smith
Tel: 0123 4222 111
Mobile: 078 9999 222
Fax: 0123 2221 121
Email: john@engineering.com
Job Title: Estimator

[Apply]

How do I add logos to my email signature?

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


Home
Software
Catalogues
Local Data
Kits
Contacts
Quotes

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 <input checked="" type="radio"/> Show Final Unit Sell & Total <input type="radio"/> Show Sell Price Buildup	Cost Views <input type="radio"/> Material Cost <input type="radio"/> Labour Cost <input type="radio"/> Mat & Lab Cost <input type="radio"/> Equipment Cost <input type="radio"/> Subcontract Cost	Sell Views <input type="radio"/> Material Sell <input type="radio"/> Labour Sell <input type="radio"/> Mat & Lab Sell <input type="radio"/> Equipment Sell <input type="radio"/> Subcontract Sell	Other <input type="radio"/> Bill Of Materials <input type="radio"/> Labour Hours
--	---	---	---

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)

Email Settings

[Email signature](#)

Email footer logos

[Add footer logo](#)
(Up to 3 logos can be added)

- 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)



Adding Terms & Conditions

How do I add my own Terms and Conditions?

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

The screenshot shows the Electrika software interface. At the top is the 'Electrika' logo and a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar labeled 'Quotes' and 'Search Quotes'. A yellow banner indicates the current project: 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. Below the banner is a row of tabs: Files, Project, Items, Active, Costing, Summary, and Reports. Under the 'Active' tab, there are three sub-tabs: Options, Preview, and Email. The main content area is titled 'Who is the report for?' and has two radio button options: 'Customer' (selected) and 'Internal user'. Below this is the 'Select report type' section, which has four columns of radio button options: 'Sell prices' (Show Final Unit Sell & Total, Show Sell Price Buildup), 'Cost Views' (Material Cost, Labour Cost, Mat & Lab Cost, Equipment Cost, Subcontract Cost), 'Sell Views' (Material Sell, Labour Sell, Mat & Lab Sell, Equipment Sell, Subcontract Sell), and 'Other' (Bill Of Materials, Labour Hours). The 'Select what to show' section has two checkboxes: 'Include the following pages in the report' (checked) and 'Include Terms & Conditions' (checked). The 'Include Terms & Conditions' checkbox is circled in red. Below this are two more checkboxes: 'Show' (checked) and 'Show Trade Prices / Discounts' (checked).

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

☒ Show Final Unit Sell & Total
☐ Show Sell Price Buildup

Cost Views

☐ Material Cost
☐ Labour Cost
☐ Mat & Lab Cost
☐ Equipment Cost
☐ Subcontract Cost

Sell Views

☐ Material Sell
☐ Labour Sell
☐ Mat & Lab Sell
☐ Equipment Sell
☐ Subcontract Sell

Other

☐ Bill Of Materials
☐ Labour Hours

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

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

Edit Terms & Conditions

T^v

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B

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




Your Terms and Conditions go here...|

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.



 Home
  Software
  Catalogues
  Local Data
  Kits
  Contacts
  Quotes

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
☒ Show Final Unit Sell & Total
☐ Show Sell Price Buildup

Cost Views
☐ Material Cost
☐ Labour Cost
☐ Mat & Lab Cost
☐ Equipment Cost
☐ Subcontract Cost

Sell Views
☐ Material Sell
☐ Labour Sell
☐ Mat & Lab Sell
☐ Equipment Sell
☐ Subcontract Sell

Other
☐ Bill Of Materials
☐ Labour Hours

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](#) [Footer text](#)
[Sender information](#)
[Company logo](#)
[Company address](#)

Footer logos

Add footer logo

(Up to 3 logos can be added)

Email Settings

[Email signature](#)

Email footer logos

Add footer logo

(Up to 3 logos can be added)

Tax / Vat

☐ Add VAT %

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.

The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar labeled 'Quotes' and 'Search Quotes'. The main area displays 'In Progress >> QUO-ELD-14-00008-A >> New Staff Room & Senior Room'. A tab bar at the bottom includes Files, Project, Items, Active, Costing, Summary, and Reports. Below the tab bar, there are buttons for Options, Preview (circled in red), and Email. A green bar indicates 'Customer Version - Show Final Unit Sell & Total'. Below this, there are buttons for Print (circled in red), PDF, Excel, and Word. The bottom of the interface shows a progress bar with '1 of 8'.

Electrika

Home Software Catalogues Local Data Kits Contacts Quotes

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

Customer Version - Show Final Unit Sell & Total

Print PDF Excel Word

1 of 8

Electrika

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

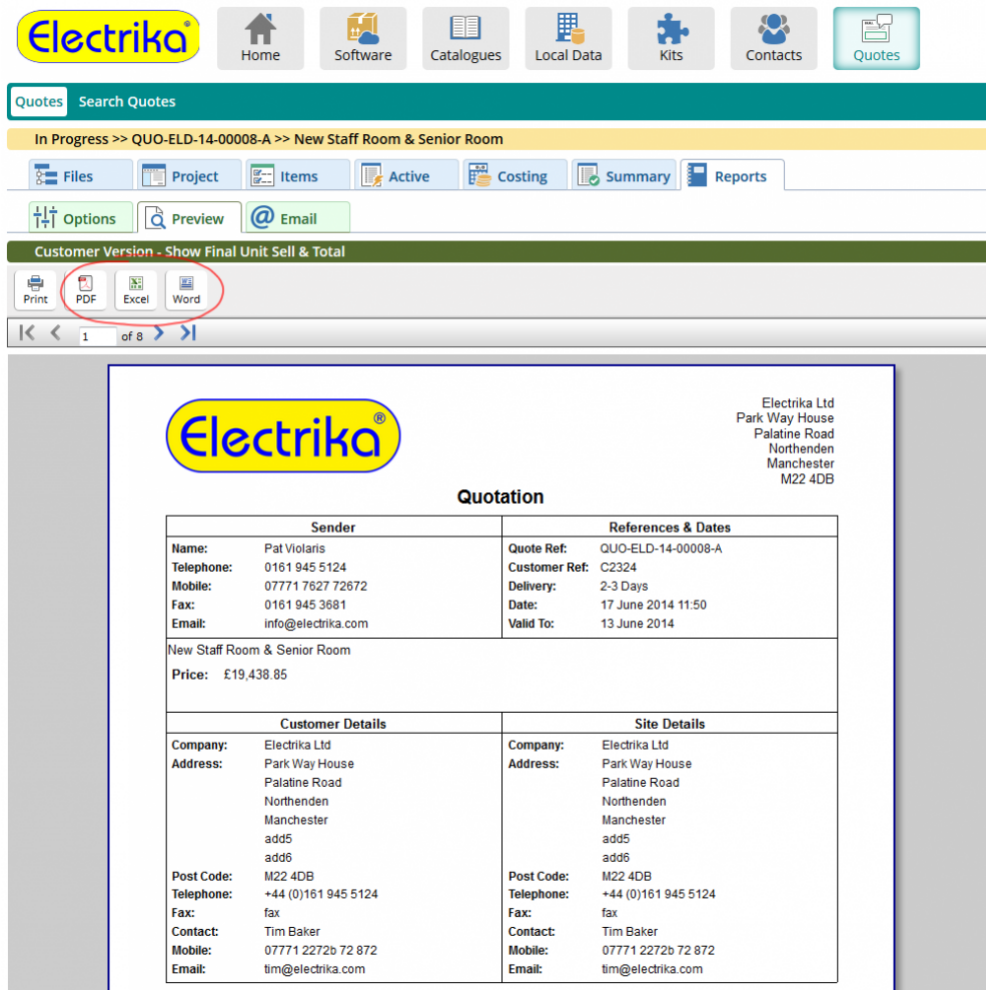
Quotation

Sender		References & Dates	
Name:	Pat Violaris	Quote Ref:	QUO-ELD-14-00008-A
Telephone:	0161 945 5124	Customer Ref:	C2324
Mobile:	07771 7627 72672	Delivery:	2-3 Days
Fax:	0161 945 3681	Date:	17 June 2014 11:50
Email:	info@electrika.com	Valid To:	13 June 2014
New Staff Room & Senior Room			
Price: £19,438.85			

Customer Details		Site Details	
Company:	Electrika Ltd	Company:	Electrika Ltd
Address:	Park Way House Palatine Road Northenden Manchester add5 add6	Address:	Park Way House Palatine Road Northenden Manchester add5 add6
Post Code:	M22 4DB	Post Code:	M22 4DB
Telephone:	+44 (0)161 945 5124	Telephone:	+44 (0)161 945 5124
Fax:	fax	Fax:	fax
Contact:	Tim Baker	Contact:	Tim Baker
Mobile:	07771 2272b 72 872	Mobile:	07771 2272b 72 872
Email:	tim@electrika.com	Email:	tim@electrika.com

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

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



Electrika

Home Software Catalogues Local Data Kits Contacts Quotes

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

Customer Version - Show Final Unit Sell & Total

Print PDF Excel Word

1 of 8

Electrika

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

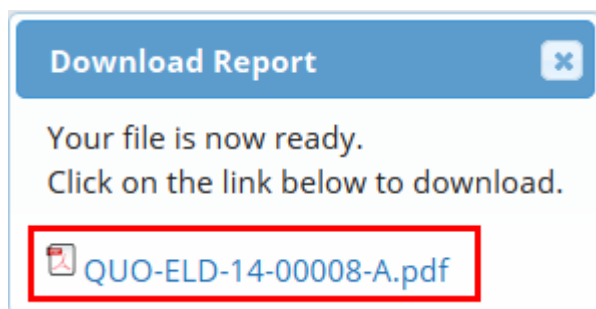
Quotation

Sender	References & Dates
Name: Pat Violaris	Quote Ref: QUO-ELD-14-00008-A
Telephone: 0161 945 5124	Customer Ref: C2324
Mobile: 07771 7627 72672	Delivery: 2-3 Days
Fax: 0161 945 3681	Date: 17 June 2014 11:50
Email: info@electrika.com	Valid To: 13 June 2014

New Staff Room & Senior Room
Price: £19,438.85


Customer Details	Site Details
Company: Electrika Ltd	Company: Electrika Ltd
Address: Park Way House Palatine Road Northenden Manchester add5 add6	Address: Park Way House Palatine Road Northenden Manchester add5 add6
Post Code: M22 4DB	Post Code: M22 4DB
Telephone: +44 (0)161 945 5124	Telephone: +44 (0)161 945 5124
Fax: fax	Fax: fax
Contact: Tim Baker	Contact: Tim Baker
Mobile: 07771 2272b 72 872	Mobile: 07771 2272b 72 872
Email: tim@electrika.com	Email: tim@electrika.com

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



Download Report

Your file is now ready.
Click on the link below to download.

 [QUO-ELD-14-00008-A.pdf](#)

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.

Electrika Home Software Catalogues Local Data Kits Contacts Quotes

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

Customer Version - Show Final Unit Sell & Total

From:
info@electrika.com

To:
tim@client.com,mike@client.com,peter@client.com
You can add up to ten emails separated by a comma

Send As:
☒ PDF ☐ XLS ☐ RTF

Attach your files:
Browse for files
Multiple files can be selected using Ctrl+Click

Current Attachments:
001 Consumer Units 02-Jun-2014 10-29-44.xlsx
notes.txt

Subject:
New Staff Room & Senior Room

Message:
For attention of MR. STEVE PRESS

Name: John Smith
Tel: 0122 323 1122
Mobile: 0782 222 1111
Fax: 0122 232 1112
Email: john@shconleasing.com

☐ Send me a copy of this email

Read Notification Options:
☒ Do not send me read notifications
☐ Send me a read notification only the first time a file is read
☐ Send me a read notification every time a file is read

Send

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.

The screenshot shows the Electrika software interface for composing an email. The top navigation bar includes buttons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar for quotes. The main content area shows the email composition form with fields for From, To, Send As, Attach your files, Current Attachments, Subject, and Message. The 'Attach your files' section is highlighted with a red box, and a red arrow points to the 'Current Attachments' list.

Electrika Home Software Catalogues Local Data Kits Contacts Quotes

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

Customer Version - Show Final Unit Sell & Total

From:
info@electrika.com

To:
tim@client.com,mike@client.com,peter@client.com

You can add up to ten emails separated by a comma

Send As:
☒ PDF ☐ XLS ☐ RTF

Attach your files:
[Browse for files](#)
Multiple files can be selected using Ctrl+Click

Current Attachments:

001 Consumer Units 02-Jun-2014 10-29-44.xlsx	X
notes.txt	X

Subject:
New Staff Room & Senior Room

Message:
For attention of MR. STEVE PRESS

Name: John Smith
Tel: 0122 323 1122
Mobile: 0782 222 1111
Fax: 0122 232 1112
Email: john@johnleisure.com

☐ Send me a copy of this email









Read Notification Options:

☒ Do not send me read notifications
☐ Send me a read notification only the first time a file is read
☐ Send me a read notification every time a file is read

Send








Managing email read notifications




- Read notifications are related to email tracking.
- You will be sent an email telling you that the recipient 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.



Quotes

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






Customer Version - Show Final Unit Sell & Total

From:





To:

You can add up to ten emails separated by a comma

Send As:
☒ PDF ☐ XLS ☐ RTF

Attach your files:

Multiple files can be selected using Ctrl+Click

Current Attachments:

 001 Consumer Units 02-Jun-2014 10-29-44.xlsx	
 notes.txt	

Subject:

Message:

For attention of MR. STEVE PRESS

Name: John Smith
Tel: 0122 323 1122
Mobile: 0782 222 1111
Fax: 0122 232 1112
Email: john@shearwatergroup.com


☐ Send me a copy of this email

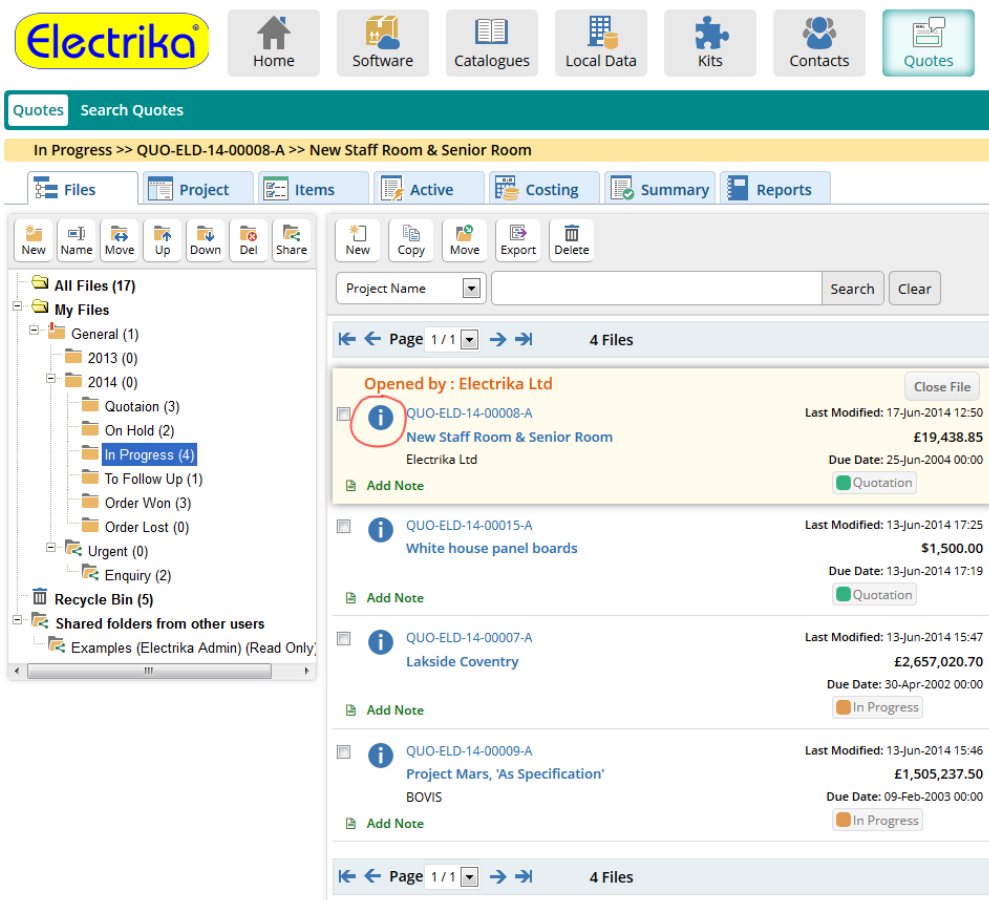
Read Notification Options:
☒ Do not send me read notifications
☐ Send me a read notification only the first time a file is read
☐ Send me a read notification every time a file is read

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.

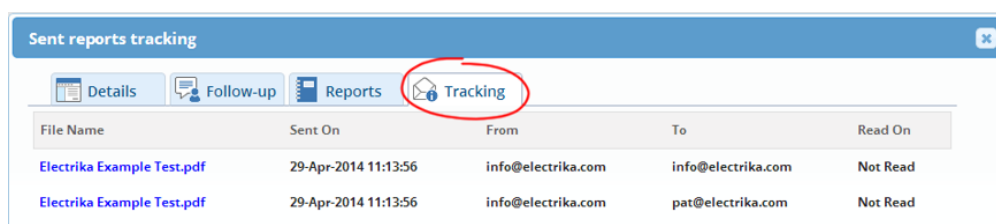
How do I track an email?

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



The screenshot shows the Electrika software interface. At the top, there's a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar for quotes. The main area is divided into tabs: Files, Project, Items, Active, Costing, Summary, and Reports. The 'Files' tab is active, showing a file manager view. On the left, there's a tree view of files, with 'In Progress' selected. On the right, a list of files is displayed. The first file, 'QUO-ELD-14-00008-A New Staff Room & Senior Room', has an information icon (i) circled in red. Other files listed include 'QUO-ELD-14-00015-A White house panel boards', 'QUO-ELD-14-00007-A Lakside Coventry', and 'QUO-ELD-14-00009-A Project Mars, 'As Specification' BOVIS'.

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



The screenshot shows the 'Sent reports tracking' dialog box. It has four tabs: Details, Follow-up, Reports, and Tracking. The 'Tracking' tab is selected and circled in red. Below the tabs is a table with the following data:

File Name	Sent On	From	To	Read On
Electrika Example Test.pdf	29-Apr-2014 11:13:56	info@electrika.com	info@electrika.com	Not Read
Electrika Example Test.pdf	29-Apr-2014 11:13:56	info@electrika.com	pat@electrika.com	Not Read

- 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.

Sent reports tracking				
<div>DetailsFollow-upReportsTracking</div>				
File Name	Sent On	From	To	Read On
Electrika Example Test.pdf	29-Apr-2014 11:13:56	info@electrika.com	info@electrika.com	29-Apr-2014 11:25:00
Electrika Example Test.pdf	29-Apr-2014 11:13:56	info@electrika.com	pat@electrika.com	Not Read

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.**

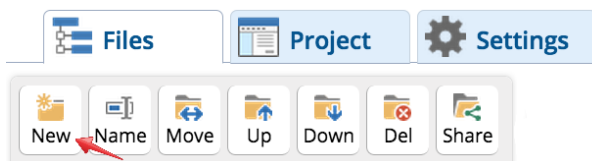
- [Adding, renaming, deleting folders](#)
- [Moving folders](#)
- [Repositioning folders](#)
- [Sharing folders](#)
- [Changing shared folder permissions](#)
- [Removing users from shared folders](#)

Adding, renaming, deleting folders

Adding a folder

How do I add folders?

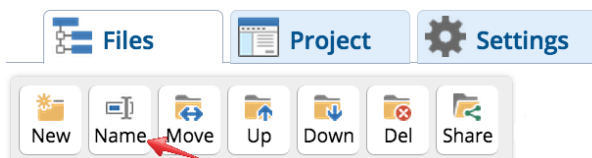
- To add a folder, select the folder called 'General' or any subfolders and click the 'New' button. You cannot add folders to 'All Files', 'My Files', 'Recycle Bin' or any of the 'Shared folders'



Renaming a folder

How do I rename a folder?

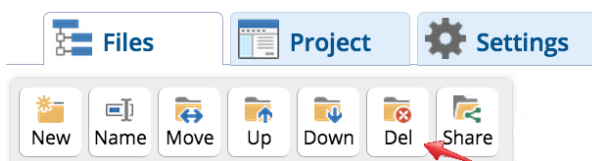
- To rename a folder, click on the folder to select it and then click on the 'Name' button. You cannot re-name 'All Files', 'My Files', 'Recycle Bin' or any of the 'Shared folders'



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'

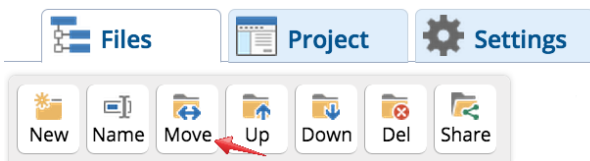


Moving folders

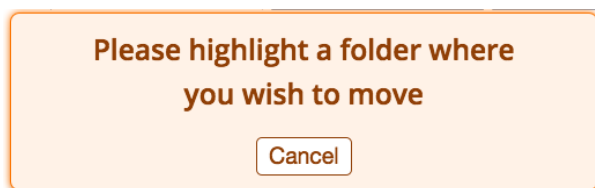
To organize your folder structure you may want to move your folder to a new location i.e. under a different parent folder.

How do I move a folder to a new location?

- Select the folder you wish to move and then click on the 'Move' button.

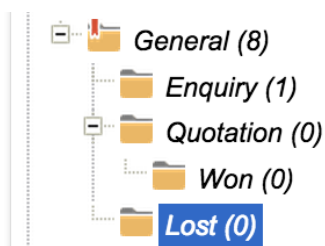


- A message will be displayed here and you can cancel the move if you wish to by clicking the 'Cancel' button.



- The folders names will appear in Italics. Click on the destination folder and this will move the original source folder to the destination.

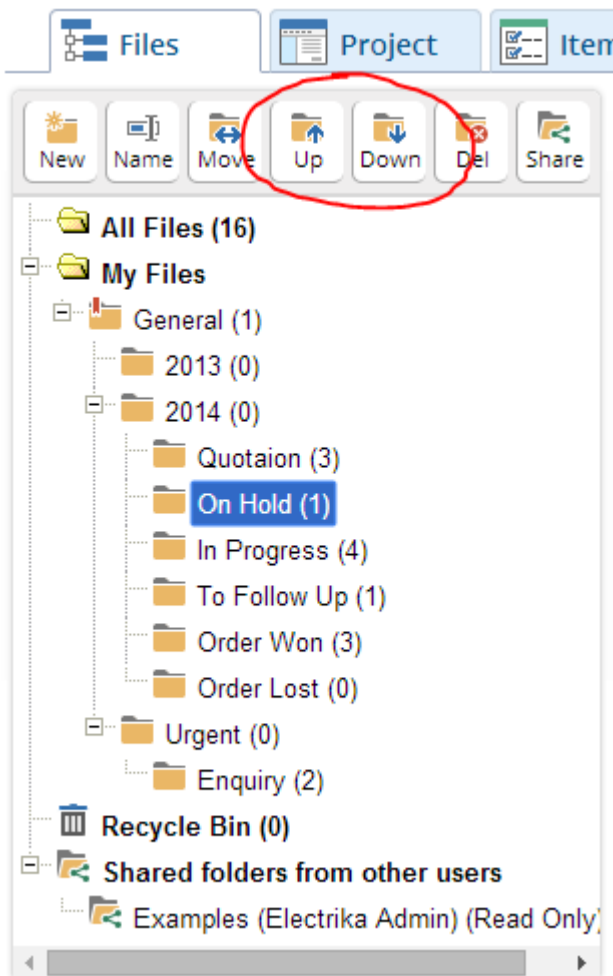
Moved Folder



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.

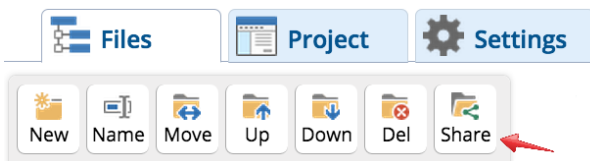


Sharing folders

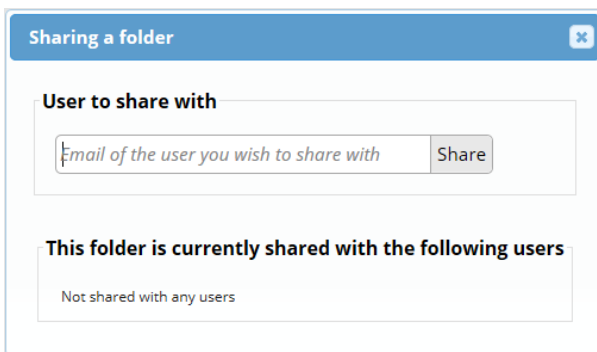
You can share your folders with any Electrika Cloud user, and you can give them 'Can Read' or 'Can Edit' permissions.

How do I share folders?

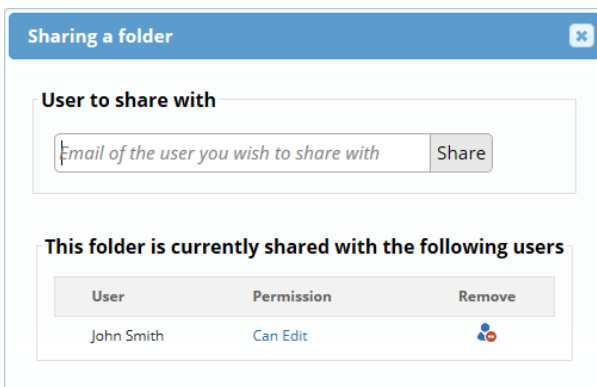
- To share a folder highlight it and click on the 'Share' button.



- 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' permission 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.

Sharing a folder

User to share with


Share

This folder is currently shared with the following users

User	Permission	Remove
John Smith	Can Edit	

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.

Sharing a folder

User to share with

Share

This folder is currently shared with the following users

User	Permission	Remove
John Smith	Can Edit	
Steve Smith	Can Read	
James Anderson	Can Edit	
Jim Gordan	Can Read	

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.

The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a search bar labeled 'Quotes' and a 'Search Quotes' button. A status bar indicates 'In Progress >> QUO-ELD-14-00015-A >> White house panel boards'. The main interface is divided into two sections: a left sidebar and a main content area. The sidebar contains a file tree with 'All Files (16)' and 'My Files'. The 'My Files' section shows a hierarchy of folders: General (1), 2013 (0), 2014 (0), Quotaion (3), On Hold (1), In Progress (4), To Follow Up (1), Order Won (3), Order Lost (0), Urgent (0), and Enquiry (2). The main content area displays a list of three files. The first file, 'QUO-ELD-14-00003-A', is highlighted with a red box. The file details are as follows:

File Reference	Project Name	Last Modified	Price	Due Date	Status
QUO-ELD-14-00003-A	Example quotation with power and distribution ABC Engineering	13-Jun-2014 15:43	£299,566.56	02-Dec-2004 00:00	Quotation
QUO-ELD-14-00004-A	Trunking	13-Jun-2014 15:42	£16,091.93	30-Nov-2004 00:00	Quotation
QUO-ELD-14-00005-A	Distribution board and MCBS	13-Jun-2014 15:42	£23,725.43	30-Nov-2004 00:00	Quotation

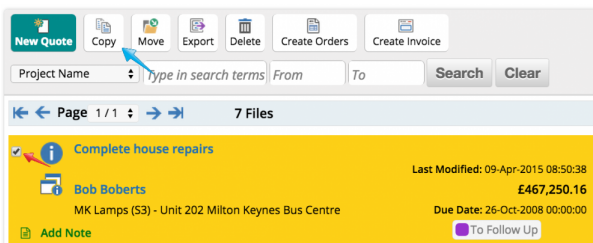
Copying files

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.

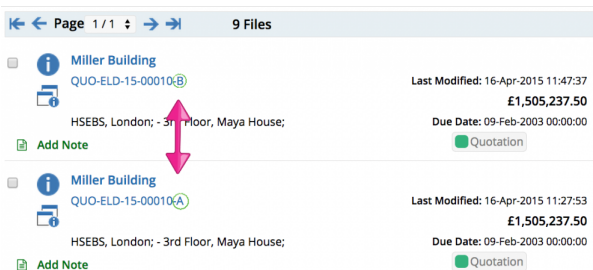
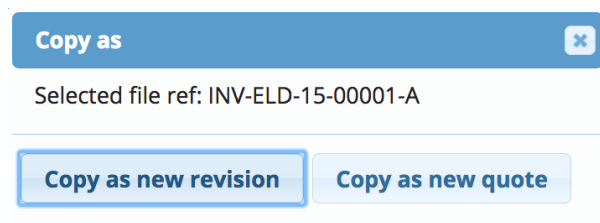
The copy file feature comes in handy if you want to use a shared file that is created by another user.

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.

The screenshot displays the Electrika web application interface. At the top, there is a navigation bar with icons for Home, Products, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a teal header bar with links for Quotes, Orders, Invoices, and Search Quotes, along with a Help icon, a notification bell, and a user profile dropdown for info@electrika.com.

The main content area shows an enquiry titled "Enquiry >> QUO-ELD-15-00008-A". Below the enquiry title is a row of tabs: Files, Project, Settings, Sections, Active, Costing, Summary, and Reports. The "Files" tab is currently selected.

On the left side, a "My Files" sidebar is visible, showing a tree structure of folders: General (9), Lost (0), Enquiry (1), Quotation (0), and Won (0). A red arrow points to the "Enquiry (1)" folder. Below this, there is a "Recycle Bin (6)" and "Shared folders from other users" section.

On the right side, a file management toolbar is shown with buttons for New Quote, Copy, Move, Export, Delete, Create Orders, and Create Invoice. A red arrow points to the "Move" button. Below the toolbar is a search bar with fields for Project Name, Type in search terms, From, and To, and buttons for Search and Clear.

Below the search bar, a list of files is displayed. The first file is "Miller Building" with ID "QUO-ELD-15-00010-B", last modified on 16-Apr-2015 11:47:37, with a value of £1,505,237.50 and a due date of 09-Feb-2003 00:00:00. The second file is "Miller Building" with ID "QUO-ELD-15-00010-A", last modified on 16-Apr-2015 11:27:53, with a value of £1,505,237.50 and a due date of 09-Feb-2003 00:00:00. Both files are marked as "Quotation".

An orange dialog box is overlaid on the left side of the file list, with the text "Please highlight a folder to move the selected files" and a "Cancel" button.

Exporting files

How do I export files?

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

The screenshot displays the Electrika web application interface. At the top, there is a navigation bar with the Electrika logo and icons for Home, Products, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a teal header bar containing links for Quotes, Orders, Invoices, and Search Quotes, along with a Help icon, a notification bell, a chat icon, and a user profile dropdown for info@electrika.com.

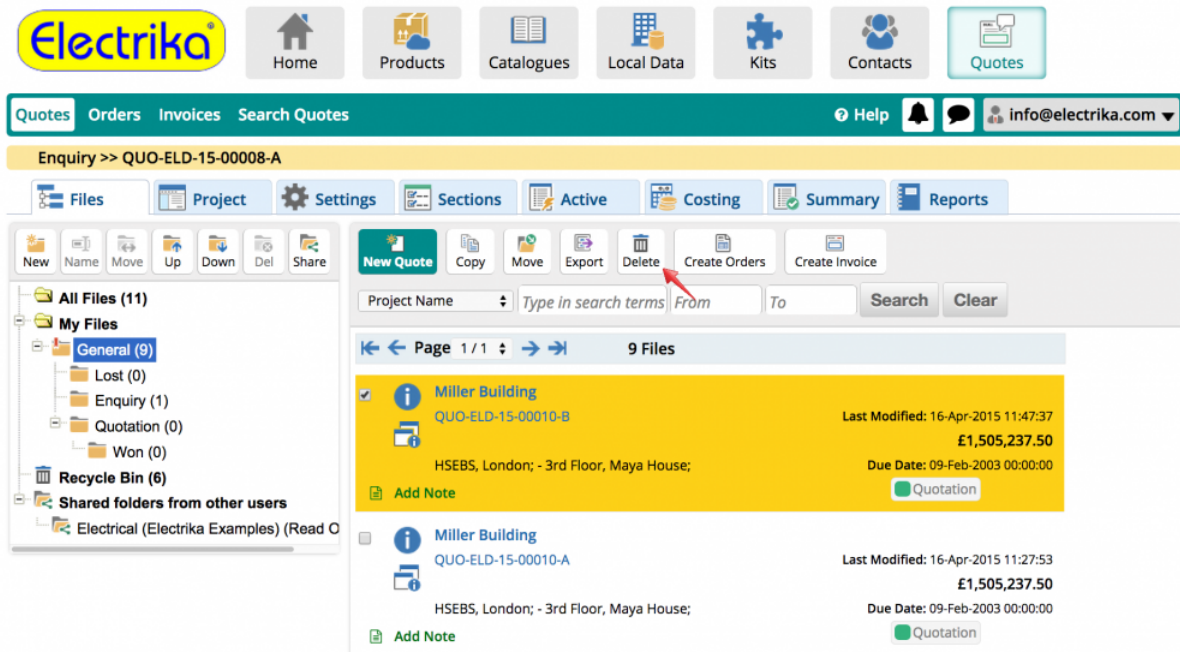
The main content area is titled 'Enquiry >> QUO-ELD-15-00008-A'. Below the title is a horizontal menu with tabs for Files, Project, Settings, Sections, Active, Costing, Summary, and Reports. The 'Files' tab is selected, showing a file management interface. On the left, there is a sidebar with a file tree under 'My Files' (General (9), Lost (0), Enquiry (1), Quotation (0), Won (0)) and a 'Recycle Bin (6)'. The main area shows a list of files. The 'Export' button is highlighted with a red arrow. Below the file list, there is a search bar and a table of files.

Project Name	Type in search terms	From	To	Search	Clear
Page 1 / 1 9 Files					
<input checked="" type="checkbox"/>	Miller Building QUO-ELD-15-00010-B	Last Modified: 16-Apr-2015 11:47:37		£1,505,237.50	
HSEBS, London; - 3rd Floor, Maya House;		Due Date: 09-Feb-2003 00:00:00		<input type="button" value="Add Note"/> <input type="button" value="Quotation"/>	
<input type="checkbox"/>	Miller Building QUO-ELD-15-00010-A	Last Modified: 16-Apr-2015 11:27:53		£1,505,237.50	
HSEBS, London; - 3rd Floor, Maya House;		Due Date: 09-Feb-2003 00:00:00		<input type="button" value="Add Note"/> <input type="button" value="Quotation"/>	

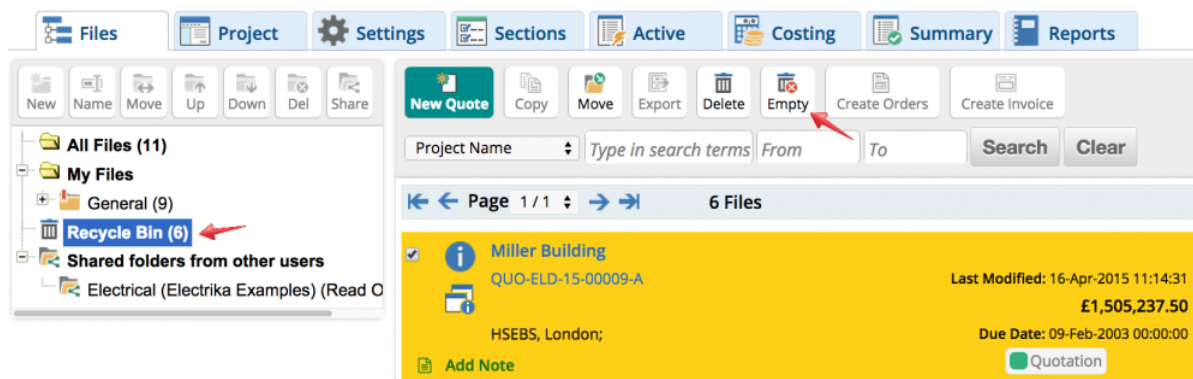
Deleting files

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'.

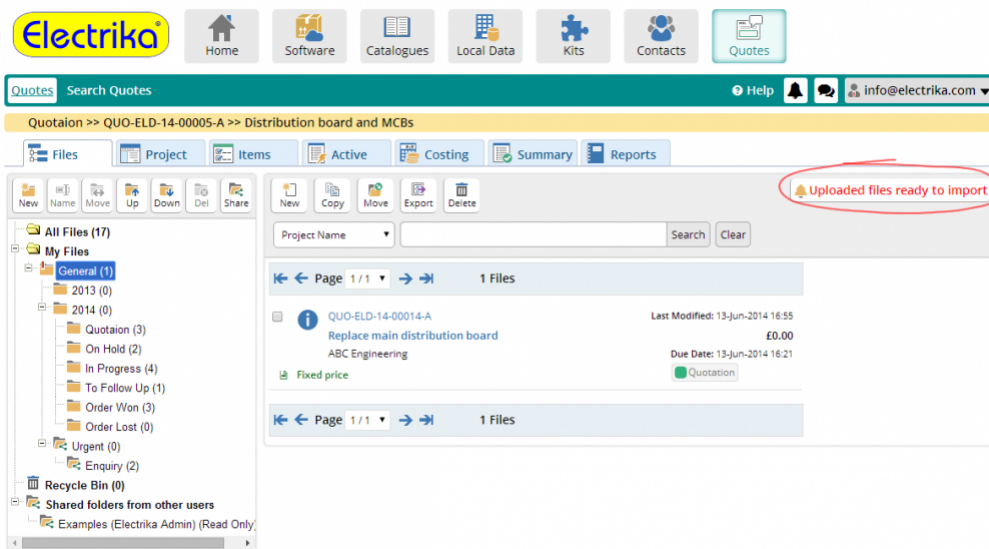


Import files from Electrika Desktop

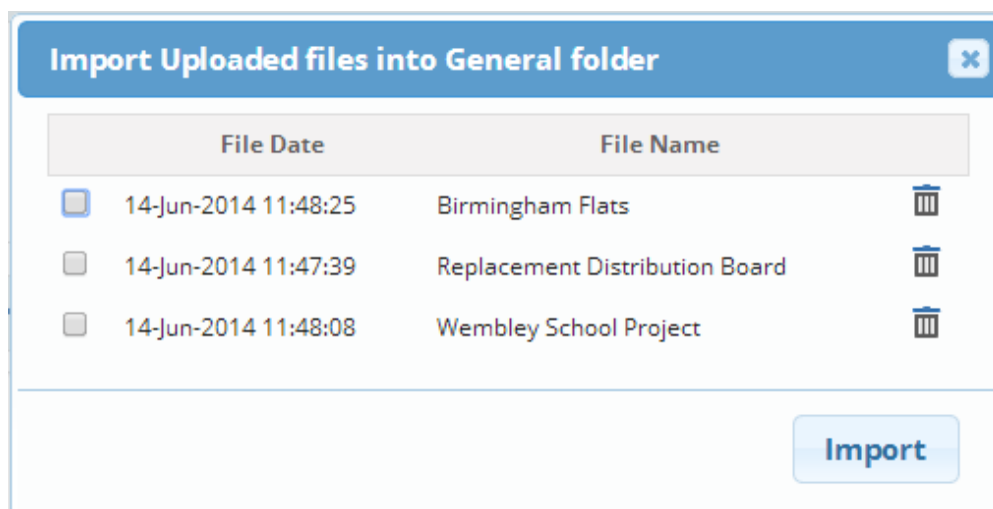
If you have been using Electrika Desktop for years you may have hundreds of files on your local machine. To use them in Electrika Cloud you need to use the Electrika Uploader.

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 appear.
- Select the files you wish to import and click the 'Import' button.

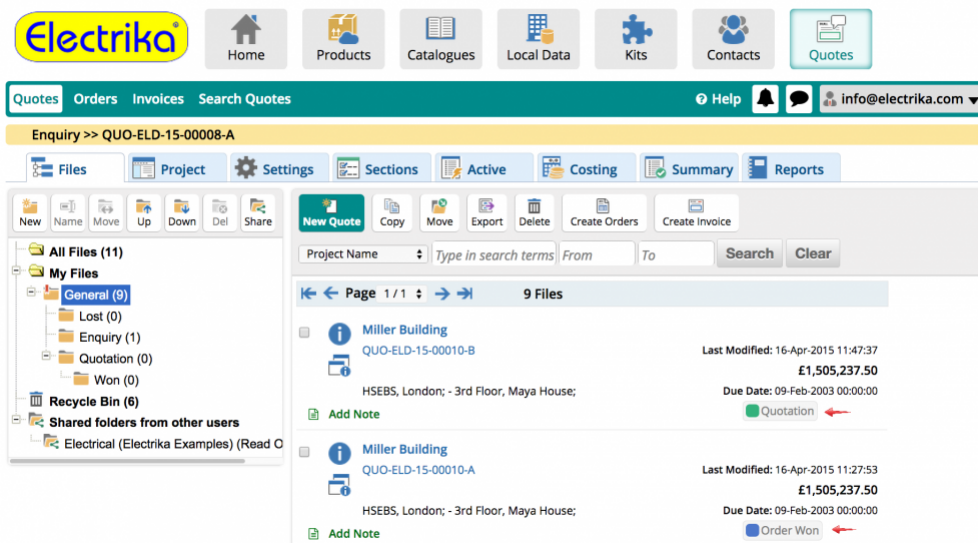


Changing project status

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.

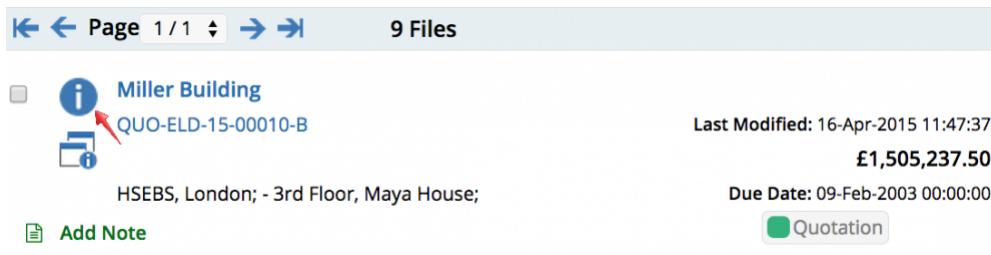


Managing follow-ups notes

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?

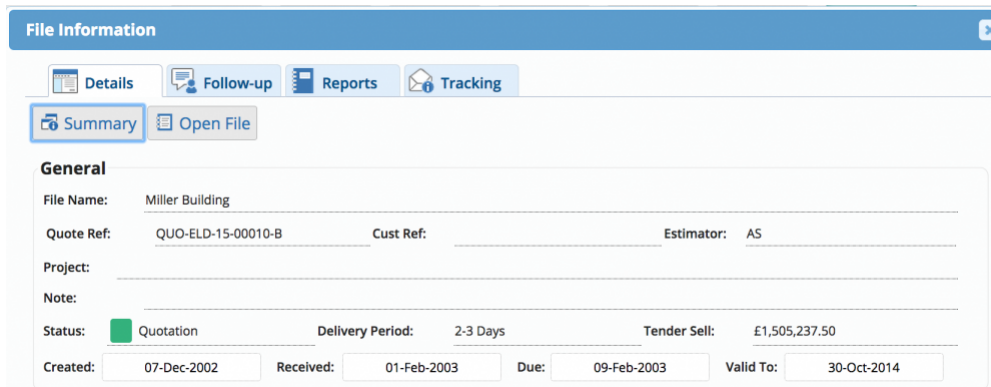
- To add Follow-up notes, click on 



Navigation: Page 1 / 1 | 9 Files

Miller Building
 QUO-ELD-15-00010-B
 HSEBS, London; - 3rd Floor, Maya House;
 Last Modified: 16-Apr-2015 11:47:37
£1,505,237.50
 Due Date: 09-Feb-2003 00:00:00
 Add Note Quotation

- 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



File Information

Details Follow-up Reports Tracking

Summary Open File


General

File Name: Miller Building

Quote Ref: QUO-ELD-15-00010-B Cust Ref: Estimator: AS

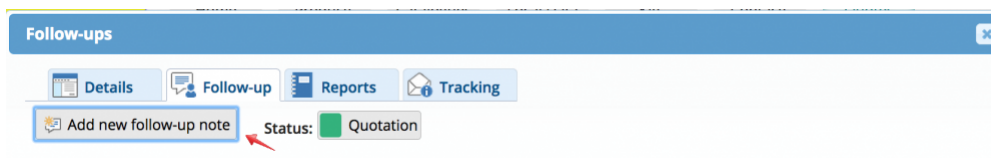
Project:

Note:

Status:  Quotation Delivery Period: 2-3 Days Tender Sell: £1,505,237.50


Created: 07-Dec-2002 Received: 01-Feb-2003 Due: 09-Feb-2003 Valid To: 30-Oct-2014

- Click on the 'Add new follow-up note' button to add some notes.




Follow-ups


Details Follow-up Reports Tracking


Add new follow-up note Status:  Quotation

- 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.

Follow-up Note 

Contact by:

Phone 



Contact date & time:


20-Apr-2015 10:05

Note:

Second order delivery next week. Spoke to the client - will call me when placed second part order.

Save

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

Follow-ups 

Details

Follow-up


Reports


Tracking

Add new follow-up note

Status: Quotation

By Electrika Ltd On 20-Apr-2015 10:22

Edit 

 Delete

Contacted by: Phone

Contacted on date & time: 20-Apr-2015 10:05

Note:

Second order delivery next week. Spoke to the client - will call me when placed second part order.

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.

New Quote

Copy

Move

Export

Delete

Create Orders

Create Invoice

Project Name

Type in search terms

From

To

Search

Clear

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.

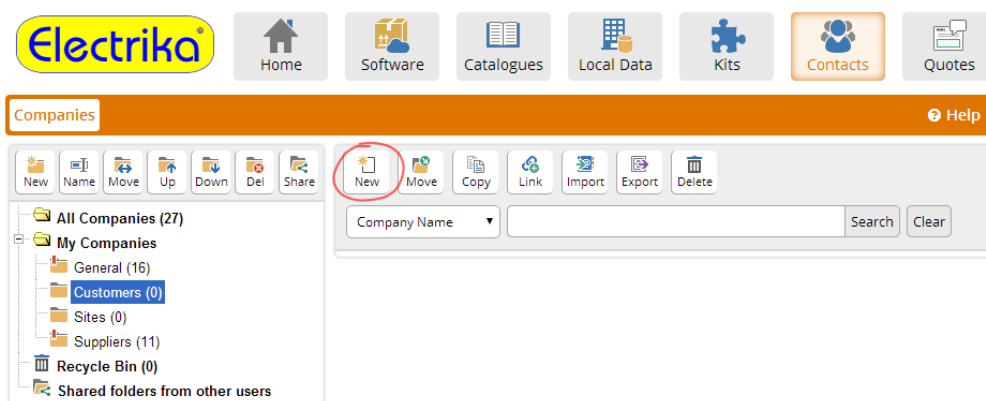
- [Adding a new company](#)
- [Adding a new contact to a company](#)
- [Moving contacts between companies](#)
- [Updating or deleting companies](#)
- [Updating or deleting contacts](#)
- [Setting up a default address column](#)
- [Copying companies](#)
- [Moving companies](#)
- [Linking companies to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

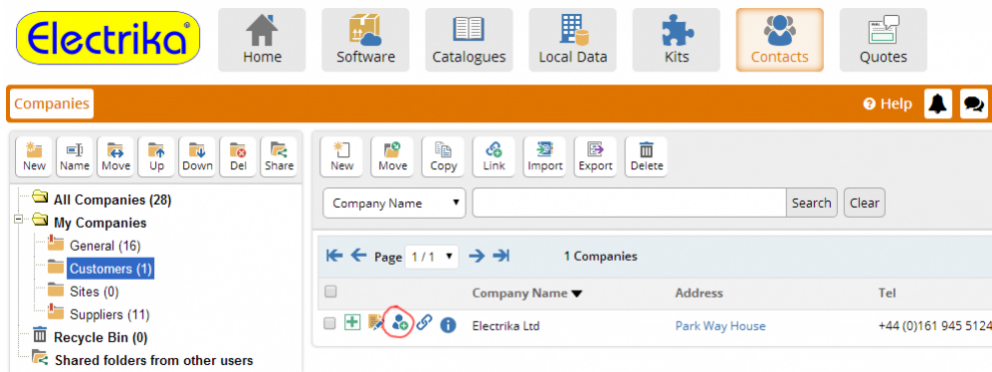
- To add a new company, click on the 'New' button, to display a form and enter the new company details.

The screenshot shows the 'New Company' form. It has a blue header bar with the title 'New Company' and a close button. The form is divided into two main sections: 'Company Details' and 'Contact Details'. The 'Company Details' section includes fields for 'Company Name', 'Address' (with multiple lines), 'Post Code', 'Tel', 'Fax', 'Website', 'Email', and 'Notes' (with a text area). The 'Contact Details' section includes fields for 'Title (Mr/Ms...)', 'First Name', 'Surname', 'Job Title', 'Tel', 'Mobile', 'Email', and 'Notes' (with a text area). At the bottom right of the form is an 'Add' button.

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.



New Contact

Company

Electrika Ltd

Title (Mr/Ms...)

Mr

First Name

Mike

Surname

Kane

Job Title

Manager

Tel


Mobile

Email

mike@electrika.com

Notes

Add

- At any time you can click on the  Grid Expand button to see the contacts associated with the company.

Home

Software

Catalogues

Local Data

Kits

Contacts

Quotes

Companies

Help

NewNameMoveUpDownDelShare

All Companies (28)
My Companies
General (16)
Customers (1)
Sites (0)
Suppliers (11)
Recycle Bin (0)
Shared folders from other users

NewMoveCopyLinkImportExportDelete


Company Name Search Clear

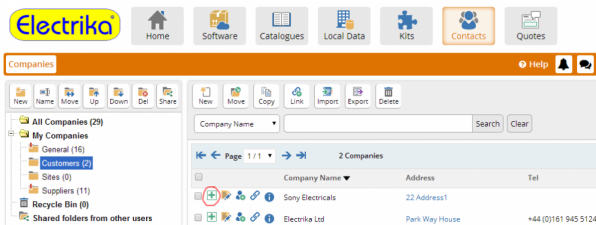
Page 1 / 1 1 Companies

	Company Name	Address	Tel
<input type="checkbox"/>	Electrika Ltd	Park Way House	+44 (0)161 945 5124
<input type="checkbox"/>	Mr Mike Kane	mike@electrika.com	
<input type="checkbox"/>	Mr John Smith	john@electrika.com	

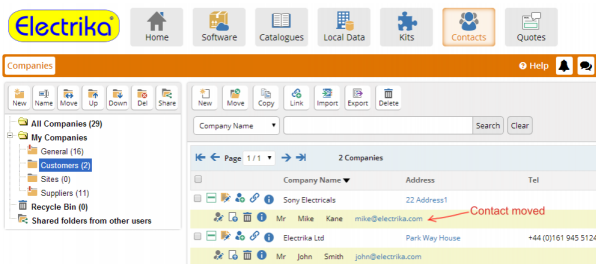
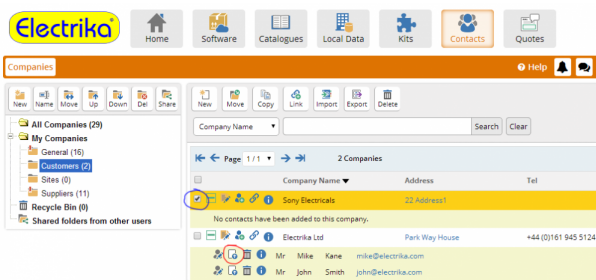
Moving contacts between companies

How do I move a contact to another company?

Click on  to expand the company and view their contacts.




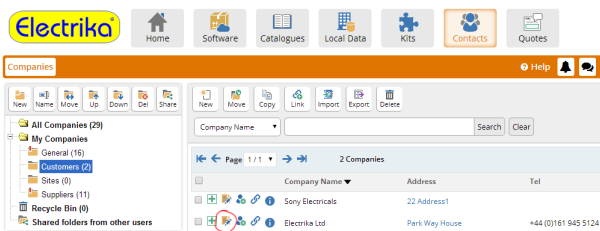
- Select the destination company where you want to move the contact. Click on the button on the contact that you wish to move.



Updating or deleting companies

How do I update a company?

- Click on the  button.



Edit Company

Company Details

Company Name

Electrika Ltd

Address

Park Way House

Palatine Road

Northenden

Manchester

Post Code

M22 4DB

Tel

+44 (0)161 945 5124

Fax

Website

www.electrika.com

Email

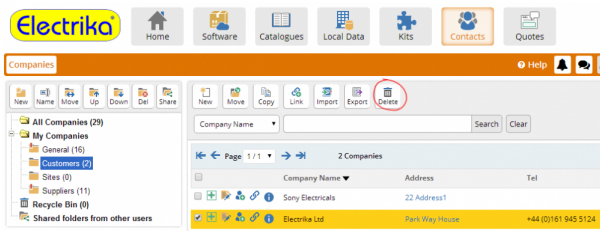
info@electrika.com

Notes

Apply

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.


Information

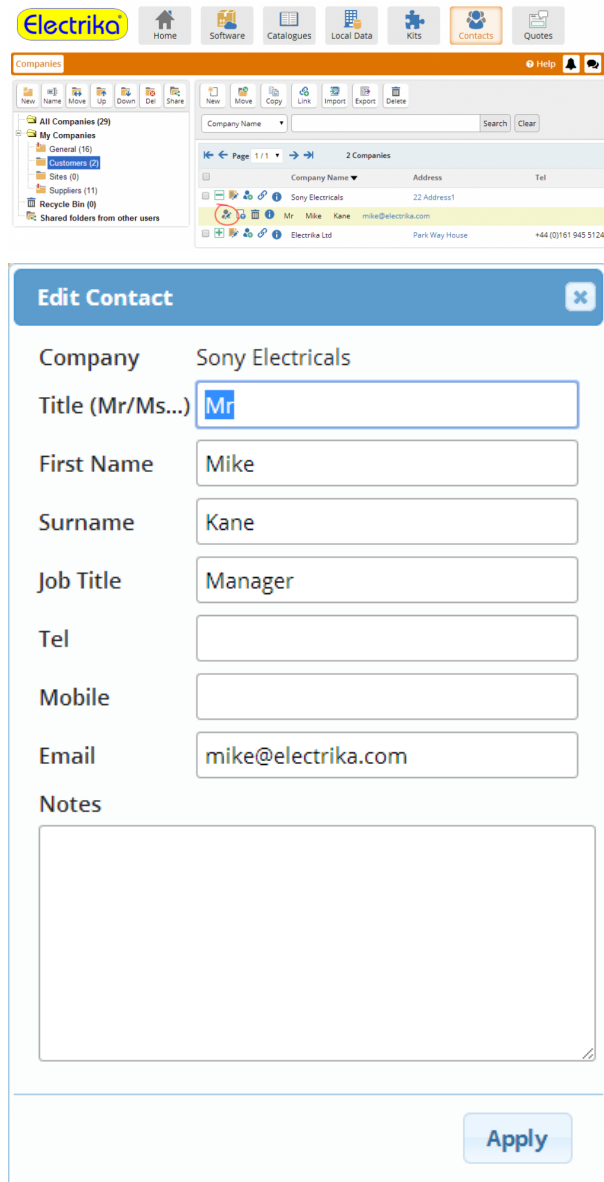
This company is linked with one or more files and cannot be deleted until it is either removed from all linked files or the linked files are deleted

OK

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.

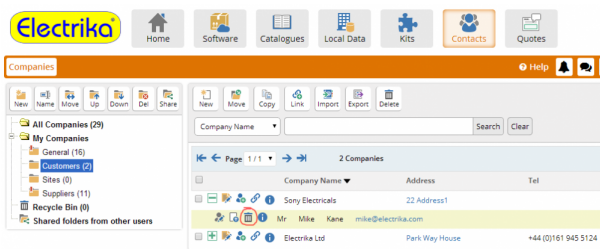


The screenshot shows the Electrika software interface. At the top, there is a navigation bar with icons for Home, Software, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a 'Companies' section with a search bar and a list of companies. The 'Edit Contact' form is open, showing details for 'Sony Electricals'. The form includes fields for Title (Mr/Ms...), First Name, Surname, Job Title, Tel, Mobile, Email, and Notes. The 'Apply' button is at the bottom right.

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

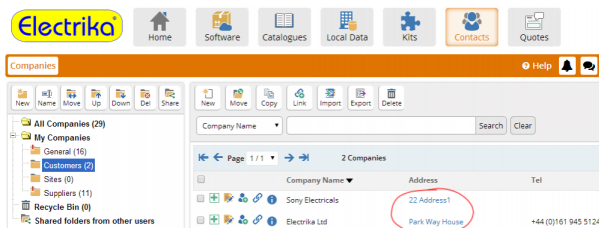
You can add upto six lines for the address details. To keep the contacts list short and clear only one address column is displayed when you are browsing the companies, and this is called the 'default address column'.

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

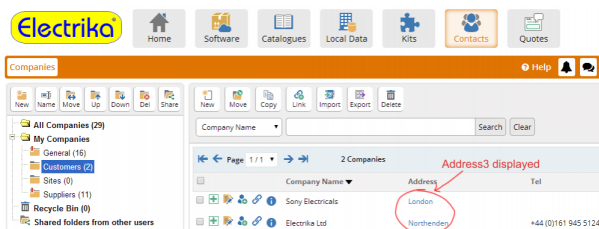
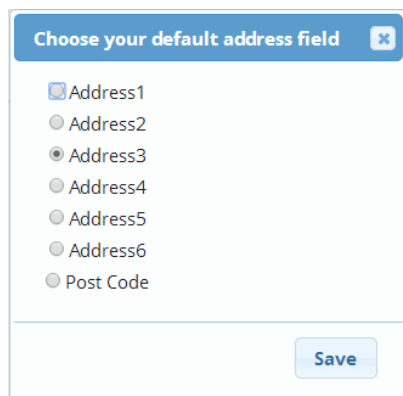
This can be useful when one of the address columns is reserved for the city or region.

How do I set the default address column?

*Click on the address link on the company.



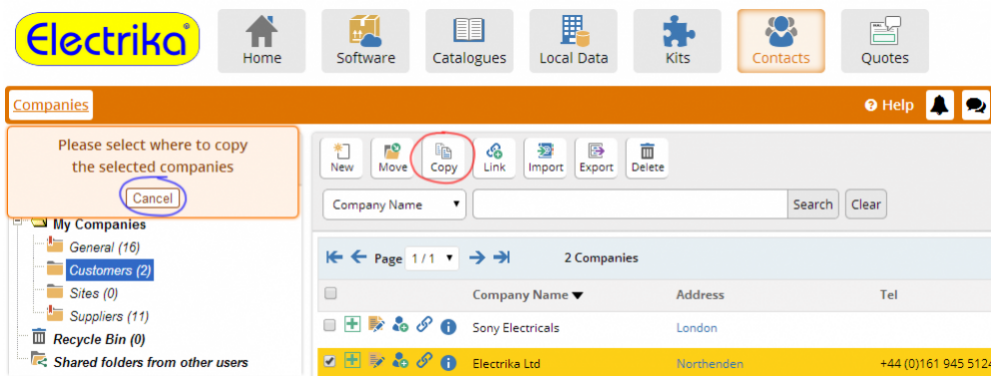
- This will display a dialog where you need to choose an address column that you wish to make default so that it appears in the company list.



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 company 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.

Electrika Home Software Catalogues Local Data Kits **Contacts** Quotes

Companies Help

Please Highlight a folder move the selected companies

Cancel

My Companies

- General (16)
- Customers (2) ← Destination
- Sites (0)
- Suppliers (11)
- Recycle Bin (0)
- Shared folders from other users

New Move Copy Link Import Export Delete

Company Name Search Clear

Page 1 / 1 2 Companies

	Company Name	Address	Tel
<input type="checkbox"/>	Sony Electricals	London	
<input checked="" type="checkbox"/>	Electrika Ltd	Northenden	+44 (0)161 945 5124

Electrika Home Software Catalogues Local Data Kits **Contacts** Quotes

Companies Help

New Name Move Up Down Del Share

All Companies (29)

- My Companies
 - General (16)
 - Customers (1)
 - Sites (1) ← Destination
 - Suppliers (11)
- Recycle Bin (0)
- Shared folders from other users

New Move Copy Link Import Export Delete

Company Name Search Clear

Page 1 / 1 1 Companies

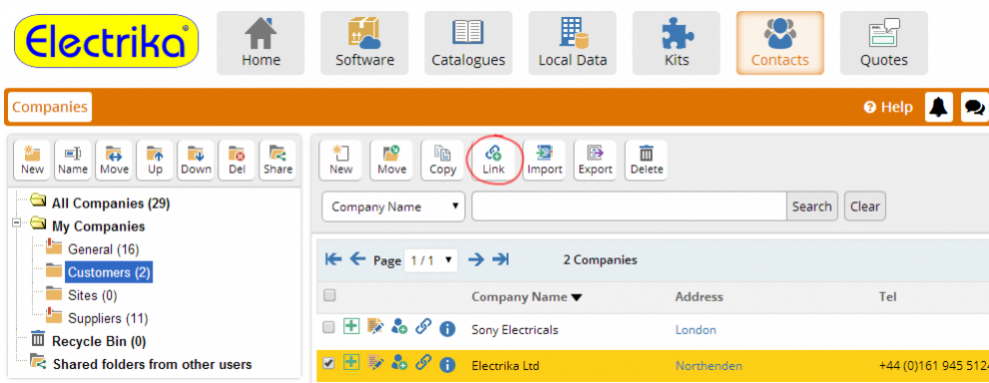
	Company Name	Address	Tel
<input checked="" type="checkbox"/>	Electrika Ltd	Northenden	+44 (0)161 945 5124

Linking companies to a project

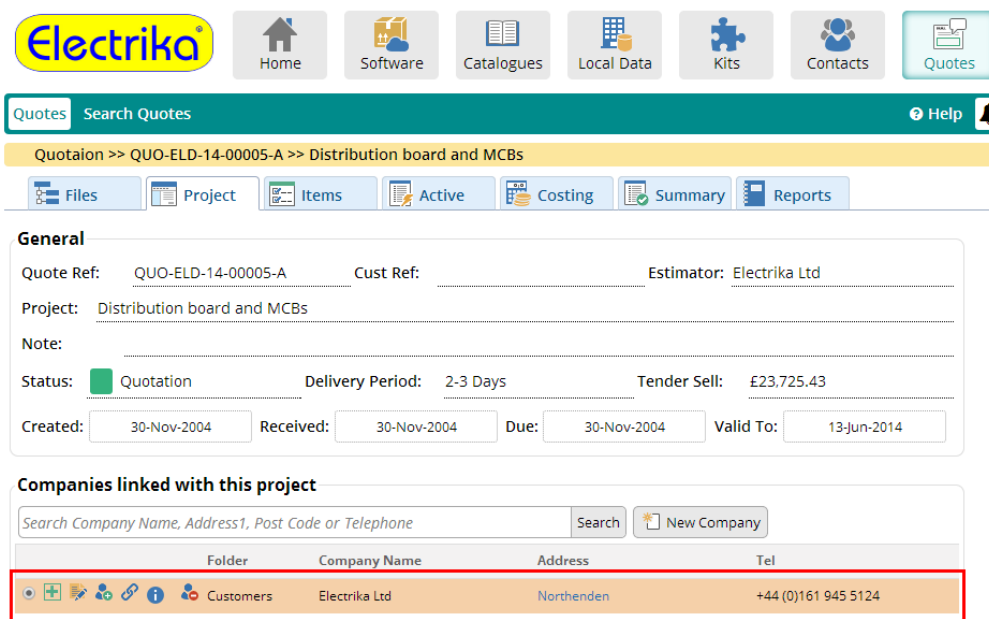
Any number of companies can be linked to your project including customers, sites and suppliers. The companies are linked to a project (not copied) and so any changes made within the project will be reflected in the contact manager and vice versa .

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.

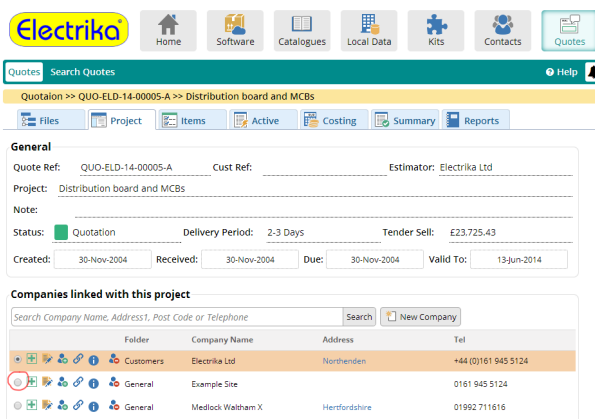


Setting a default company or contact

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.



Electrika Home Software Catalogues Local Data Kits Contacts Quotes

Quotes Search Quotes Help

Quotation >> QUO-ELD-14-00005-A >> Distribution board and MCBs

Files Project Items Active Costing Summary Reports

General

Quote Ref: QUO-ELD-14-00005-A Cust Ref: Estimator: Electrika Ltd

Project: Distribution board and MCBs

Note:

Status: ☒ Quotation Delivery Period: 2-3 Days Tender Sell: £23,725.43


Created: 30-Nov-2004 Received: 30-Nov-2004 Due: 30-Nov-2004 Valid To: 13-Jun-2014

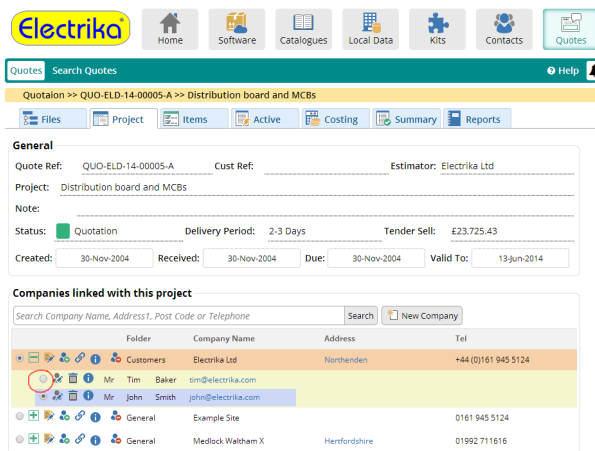
Companies linked with this project

Search Company Name, Address1, Post Code or Telephone Search New Company

Folder	Company Name	Address	Tel
Customers	Electrika Ltd	Northenden	+44 (0)161 945 5124
General	Example Site		0161 945 5124
General	Medlock Waltham X	Hertfordshire	01992 711616

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.



Electrika Home Software Catalogues Local Data Kits Contacts Quotes

Quotes Search Quotes Help

Quotation >> QUO-ELD-14-00005-A >> Distribution board and MCBs

Files Project Items Active Costing Summary Reports

General

Quote Ref: QUO-ELD-14-00005-A Cust Ref: Estimator: Electrika Ltd

Project: Distribution board and MCBs

Note:

Status: ☒ Quotation Delivery Period: 2-3 Days Tender Sell: £23,725.43

Created: 30-Nov-2004 Received: 30-Nov-2004 Due: 30-Nov-2004 Valid To: 13-Jun-2014

Companies linked with this project

Search Company Name, Address1, Post Code or Telephone Search New Company

Folder	Company Name	Address	Tel
Customers	Electrika Ltd	Northenden	+44 (0)161 945 5124
General	Example Site		0161 945 5124
General	Medlock Waltham X	Hertfordshire	01992 711616

Importing and exporting contacts

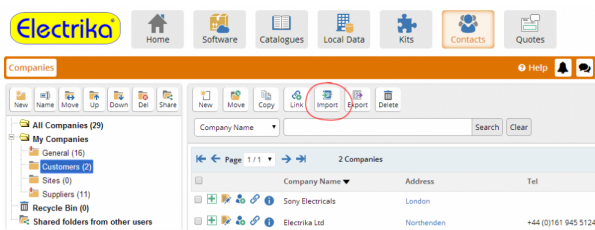
You can import from Excel files in .xls or .xlsx format. The companies and contacts are exported in .xlsx format.

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

Company Name	Address	Tel	Contact Name	Contact Email	Contact Phone
Electrika Ltd	123 Main St	01234 567890	John Doe	john.doe@electrika.co.uk	01234 567890
Electrika Ltd	123 Main St	01234 567890	Jane Smith	jane.smith@electrika.co.uk	01234 567890

How do I import contacts?

- Click on the 'Import' button.



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

Import companies from Excel

Please choose an Excel file then click 'Upload'

Browse... Upload

- 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'

Please match the following columns with your E... ✕

Columns in Electrika

Company Name

Company Address1

Company Address2

Company Address3

Company Address4

Company Address5

Company Address6

Company Post Code

Company Tel

Company Fax

Company Website

Company Email

Company Notes

Contact Title (Mr/Ms...)

Contact First Name

Contact Surname

Contact Job Position

Contact Email

Contact Mobile

Contact Tel

Contact Notes

Columns in your file

Company Name

Please Select / Not Available

Please Select / Not Available

Company Name

Company Notes

Company Tel

Company Fax

Company Email

Address1

Address2

Address3

Address4

Address5

Address6

PostCode

Title

Firstname

Surname

JobTitle

Contact Notes

Contact Tel

Contact Mobile

Please Select / Not Available

Please Select / Not Available

Please Select / Not Available

Please Select / Not Available

Please Select / Not Available

Please Select / Not Available

Please Select / Not Available

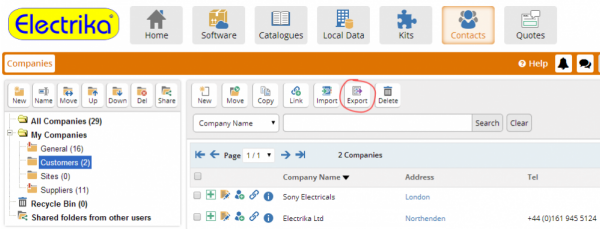
Please Select / Not Available

Please Select / Not Available

Import

How do I export contacts?

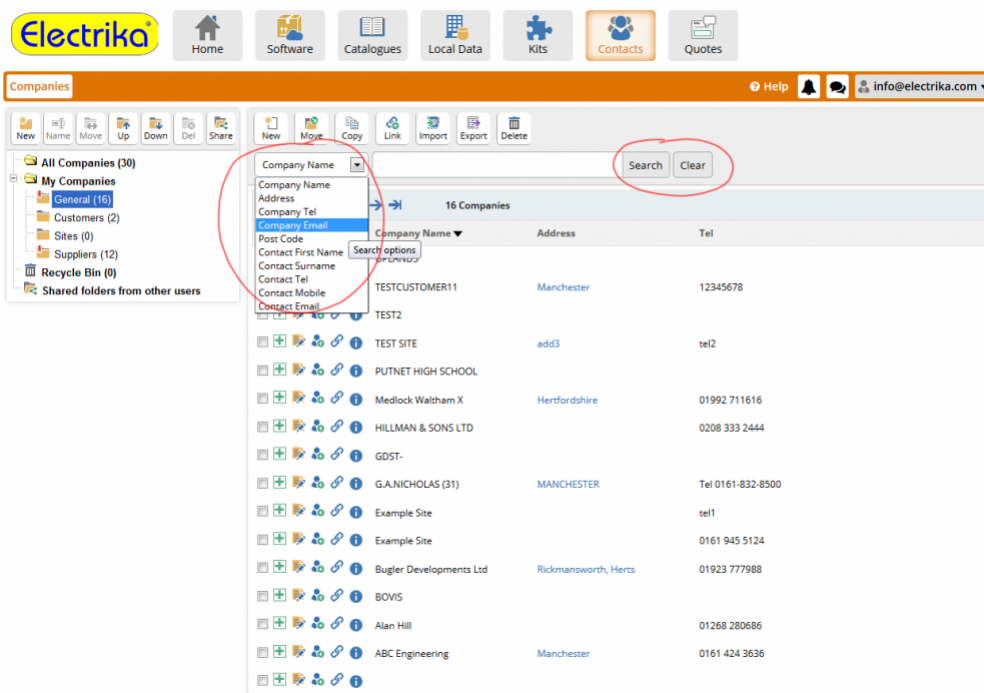
- Click on the ‘Export’ button.



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 original view.



Transferring 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.

Electrika Home Company Catalogues Price Downloads Software News

Q Search


Download

Electrika Desktop

Electrika Desktop is a powerful and easy to use estimating, ordering and job costing packages, incorporating e-Catalogues from leading manufacturers.


You can also upload your Electrika Desktop quotes to Electrika Cloud using our Uploader. Please click [here](#) for a guide to the Uploader.

New User




Install Electrika Desktop for the first time on a PC

Update



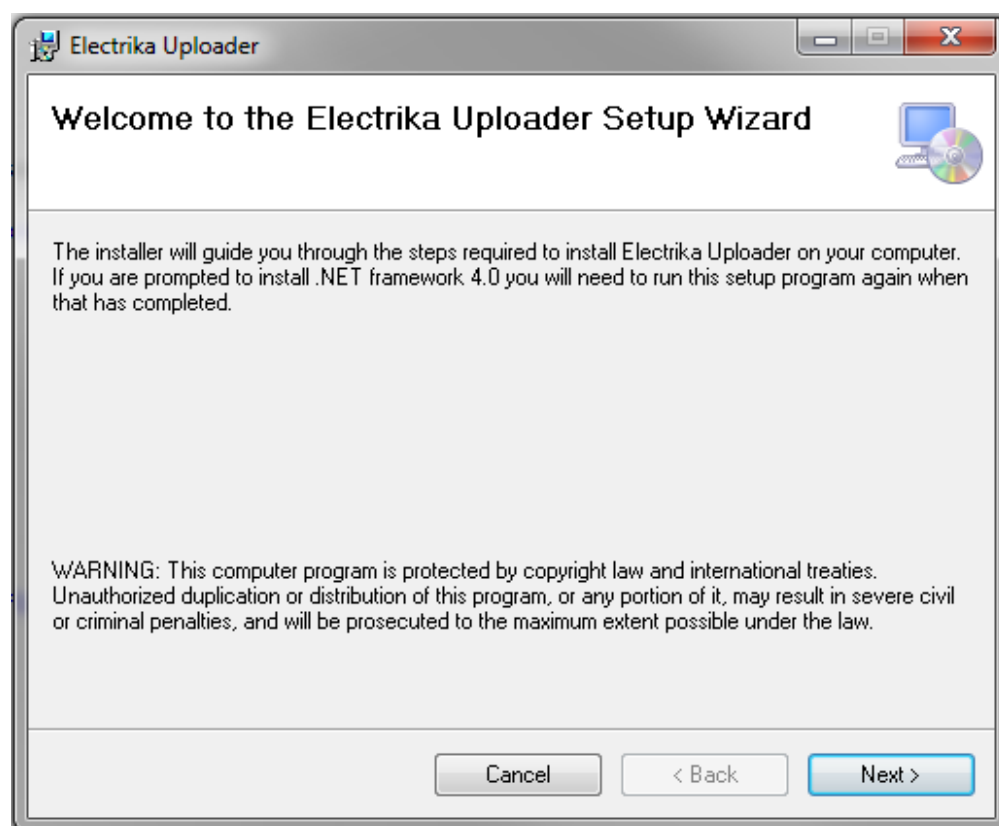
Update any previous version of Electrika Desktop to the latest version.

Upload



Upload your Electrika Desktop quotes and settings to Electrika Cloud.

- 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.



The screenshot shows a Windows-style window titled "Sign in" with a close button in the top right corner. The window contains the "Electrika Uploader" logo, which is a yellow circle with a blue cloud and a red arrow pointing up. Below the logo, the text "Sign in" is displayed. There are two input fields: "Email" and "Password". Below the "Password" field is a checkbox labeled "Stay signed in" which is checked. A "Sign in" button is located below the checkbox. At the bottom of the window, there are two blue hyperlinks: "Forgotten password?" and "New users please click here to register".

Sign in

Electrika Uploader

Sign in

Email

Password

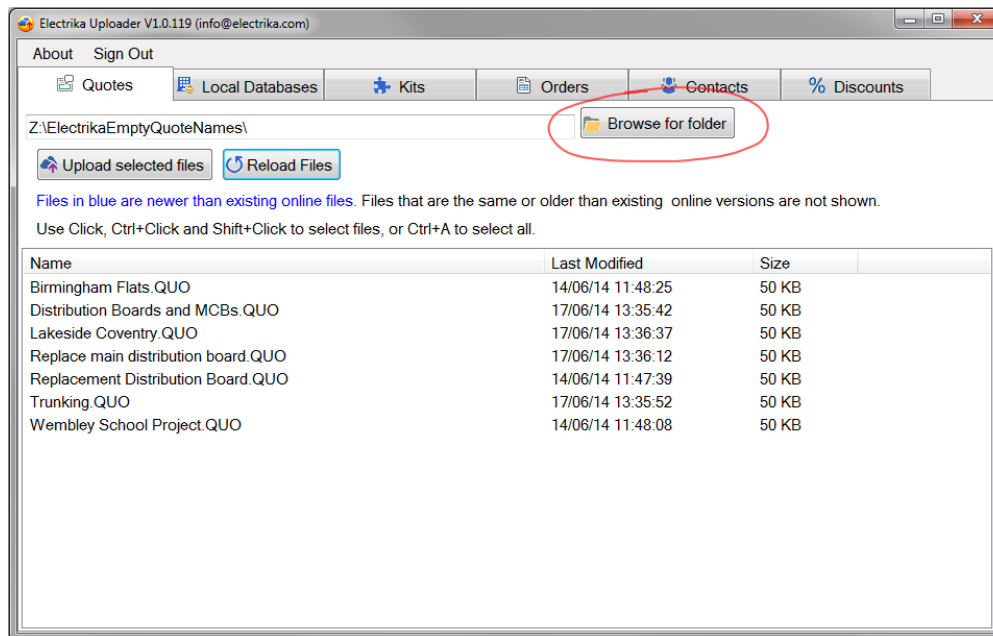
☒ Stay signed in

[Forgotten password?](#)

[New users please click here to register](#)

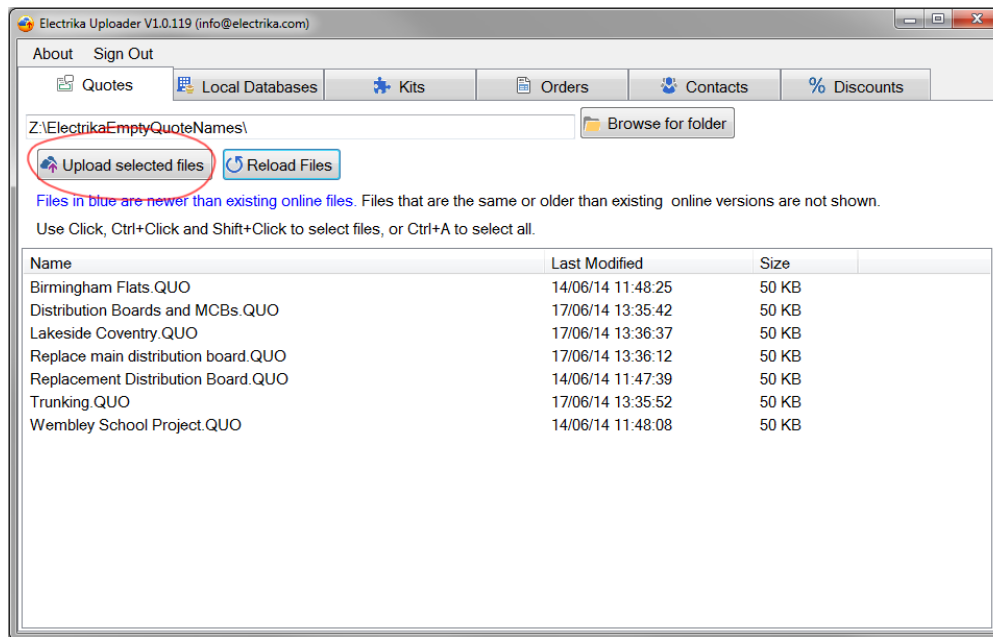
Browsing for the Electrika folder

- 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.

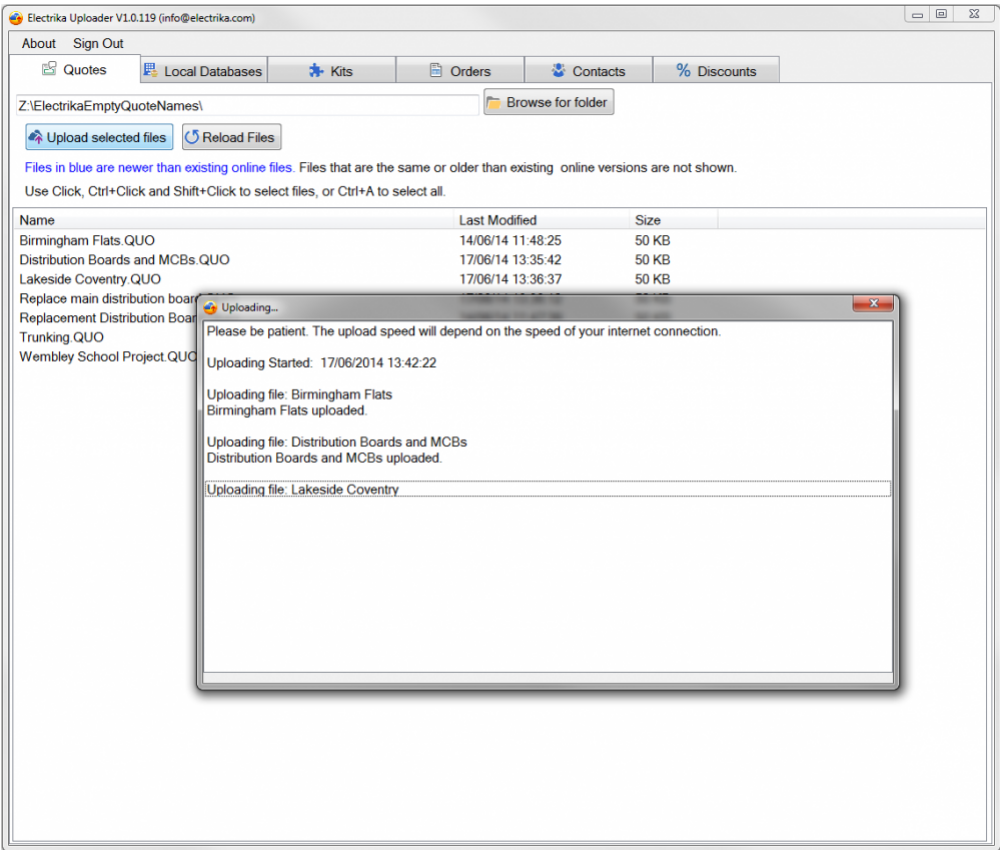


Uploading quotes, local data & kits

- 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.



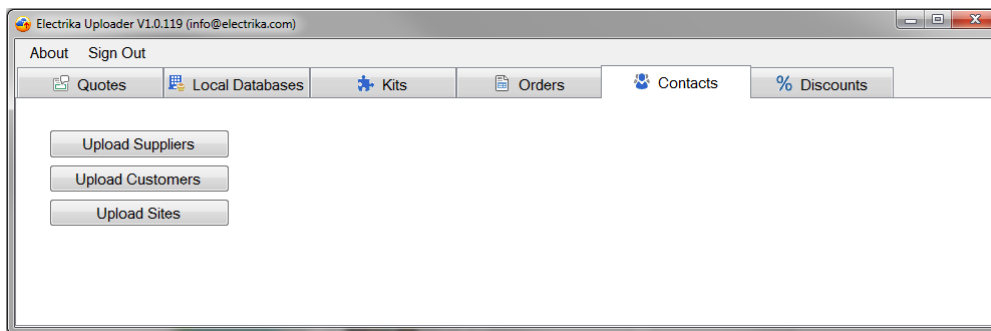
- This will start uploading files and a progress dialog window will be displayed.



✿ 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.

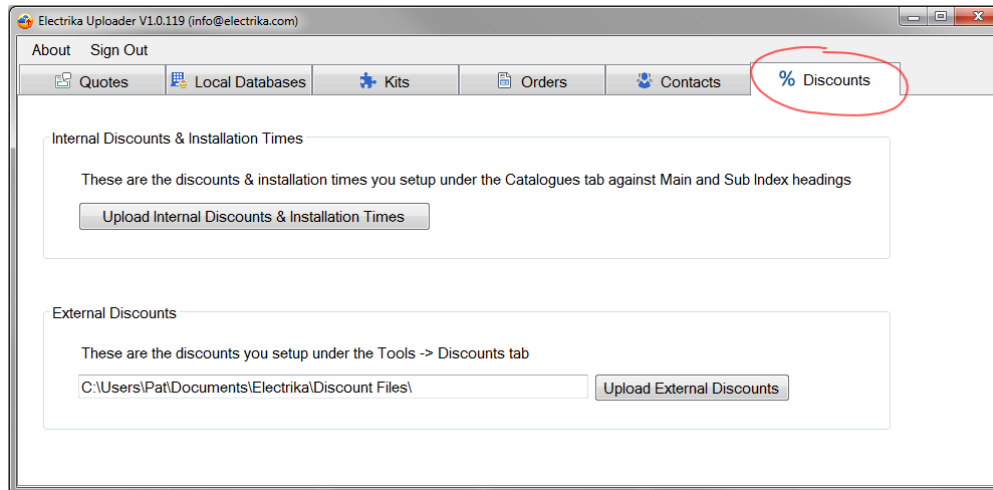
Uploading contacts

- 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'.

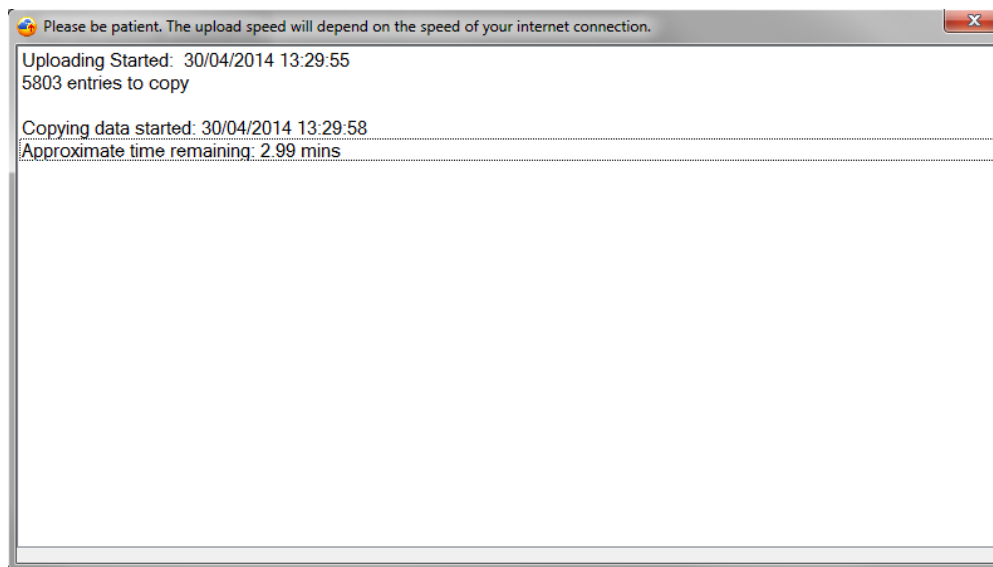


Uploading install times & discounts

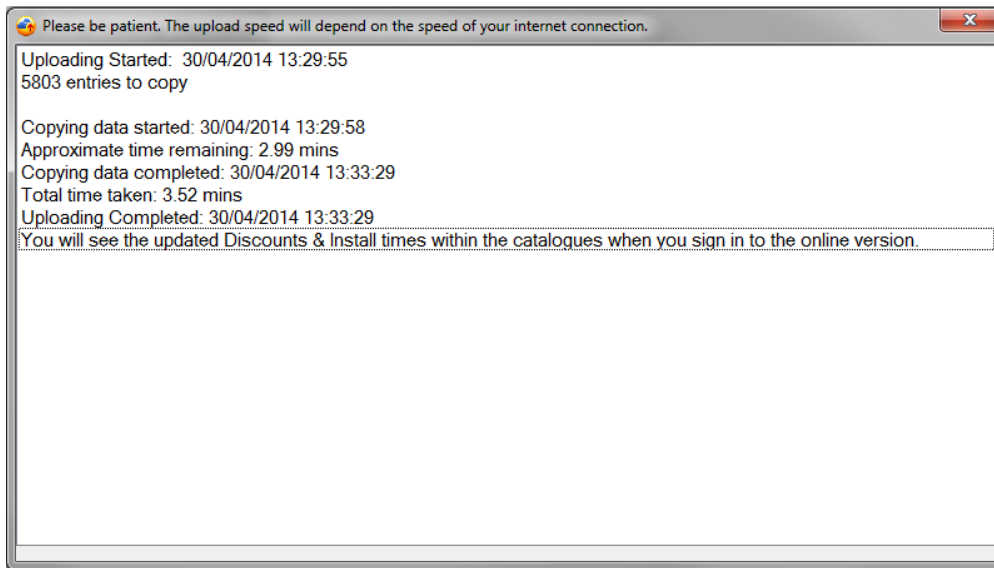
- To upload install times & discounts go to the 'Discounts' tab.



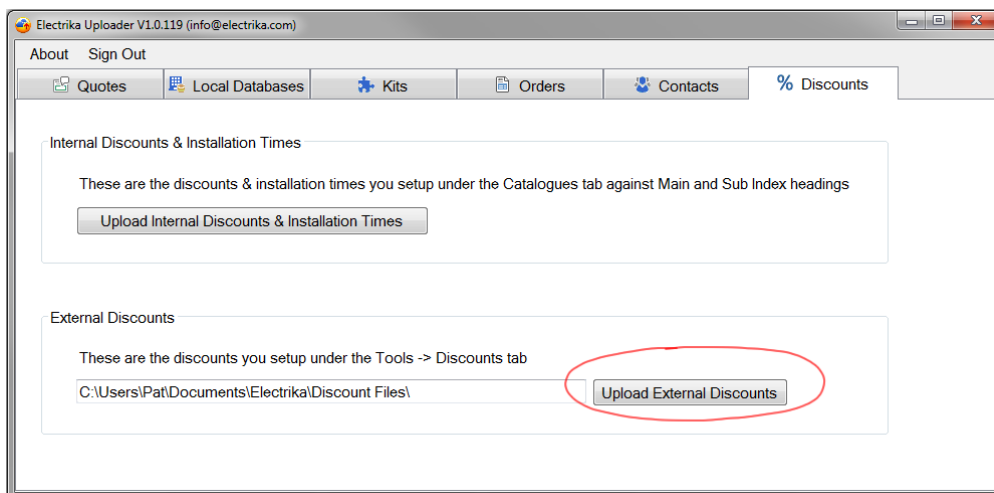
- Click on 'Upload Internal Discounts & Installation Times' to upload the internal install times & discounts that you might have setup under the Catalogues tab against main and sub Index headings on Electrika Desktop.
- This will start uploading and a dialog window will be displayed.



- 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.

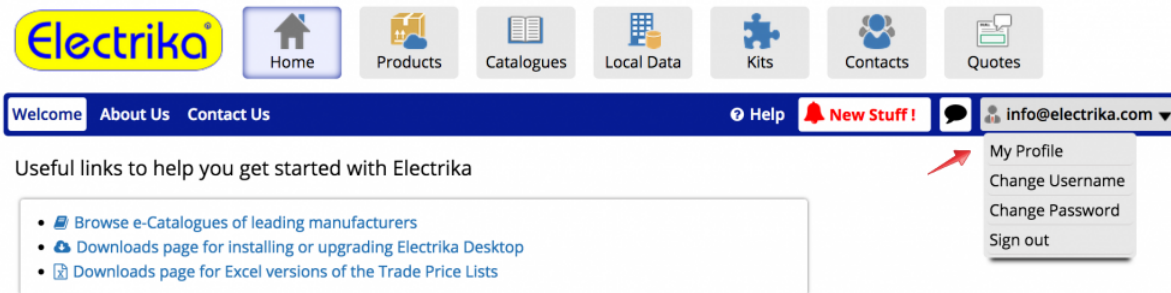
In the following links you'll find all the information you need to know in regards to currencies.

- [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.

Contact Information

Title
Mr

First Name
Electrika

Surname
Ltd

Company
Electrika Ltd

Telephone
01619455124

Country
United Kingdom

Currency
GBP - United Kingdom

Postcode
M22 4JP

A red arrow points to the 'GBP - United Kingdom' option in the 'Currency' dropdown menu.

Files with different currencies

How do I add files of different currencies?

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

The screenshot displays the Electrika software interface. At the top, there is a navigation bar with icons for Home, Products, Catalogues, Local Data, Kits, Contacts, and Quotes. Below this is a teal header bar with tabs for Quotes, Orders, Invoices, and Search Quotes. A yellow banner indicates the current view: General >> QUO-ELD-15-00006-A.

The main interface is divided into several sections. On the left, there is a sidebar with a file explorer showing folders like 'All Files (8)', 'My Files', 'General (7)', 'Recycle Bin (2)', and 'Shared folders from other users'. The central area contains a toolbar with icons for New, Name, Move, Up, Down, Del, and Share. Below the toolbar, there is a search bar and a list of files.

The file list shows three entries:

File Name	Last Modified	Amount	Due Date	Actions
QUO-ELD-15-00006-A	09-Apr-2015 08:43:58	\$8,867.85	09-Apr-2015 08:42:37	Add Note, Quotation
Complete house repairs	08-Apr-2015 13:36:28	£571,249.07	26-Oct-2008 00:00:00	Add Note, To Follow Up
Miller Building	24-Nov-2014 13:22:02	£1,505,237.50	09-Feb-2003 00:00:00	Add Note, Quotation

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](https://www.xe.com) is provided.

Convert to your currency

1.00 GBP = 1.48 USD

[Click here to find the latest conversion rates](#)

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