Exporting a Fusion Design to KBBConnect

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One of the most time saving features of KBBConnect is the ability to import your CAD designs. KBBConnect then prices those designs accurately using your suppliers' pricelists, ready for you to produce a quotation and invoice. Drawing to Quote in minutes!

There are two ways to import your Fusion CAD drawing into KBBConnect:

- KBBConnect – Seamless link Button
- XML Export from Fusion / Import to KBBConnect

Using KBBConnect Seamless Link with Fusion

To use the Fusion – KBBConnect seamless link, you **MUST** open Fusion as an ADMINISTRATOR. This is done by right-clicking on your Fusion program icon and choosing *Run as Administrator*.
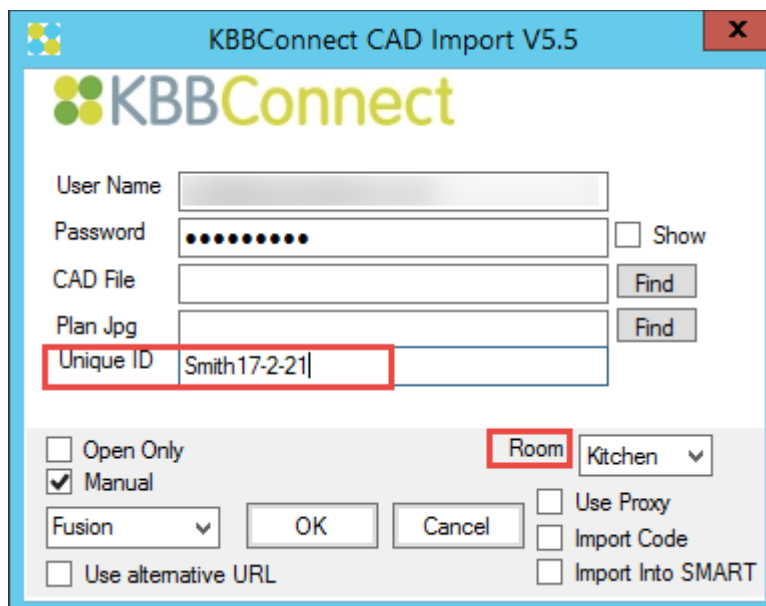
To use Seamless Link:

1. When you have finalised your drawing and are ready to import the components into

    KBBConnect, click on the [KBB Connect icon] button.

2. The following dialog box will be displayed:

Please ensure:

- Your KBBConnect **Username** and **Password** are entered correctly.
- You type in a **Unique ID** number for the job – this will be picked up by KBBConnect and used as the unique Job Number for the project **(CAD Job ID)**

NOTE:

If you use the same **Unique ID** on another Job when it imports to KBBConnect it will overwrite the job that has the same **Unique ID**

- Under Room dropdown specify whether your drawing is of a *Kitchen, Bathroom or Bedroom*.
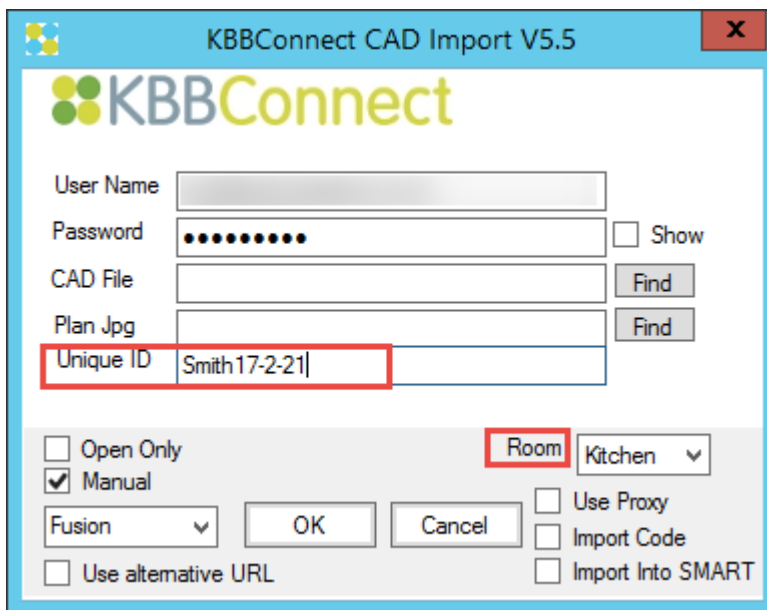
3. Click on the **OK** button to transfer the file to KBBConnect.

    NOTE: The **Manual** check box also allows you to check that the correct CAD program has been set.

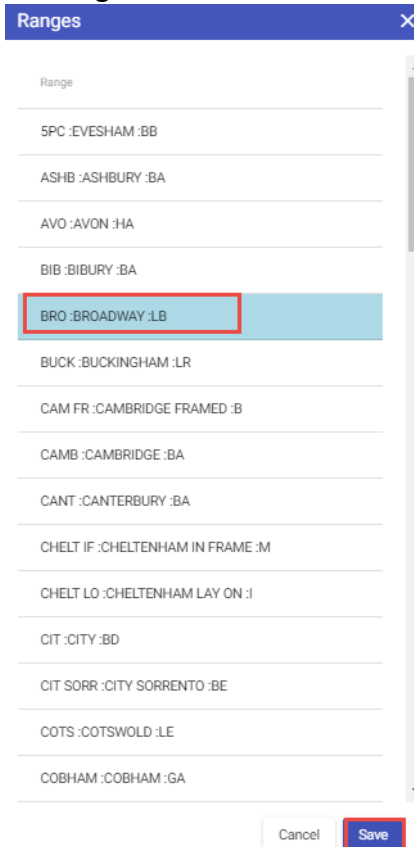4. KBBConnect will open automatically, and a job will be created.

The **Select Supplier** dialog box will display your suppliers:


Use the **Search** field to find your supplier if necessary. Choose the appropriate furniture supplier and click on the **Select** button.

5. The **Select Range** dialog box will be displayed. Choose the appropriate range from your drawing and click on the **Save** button.

Finally, (and for kitchens only) the **Product Properties** dialog box will display. Make a selection for all items coded with **N/S** (Not selected) and select the **Save** button.
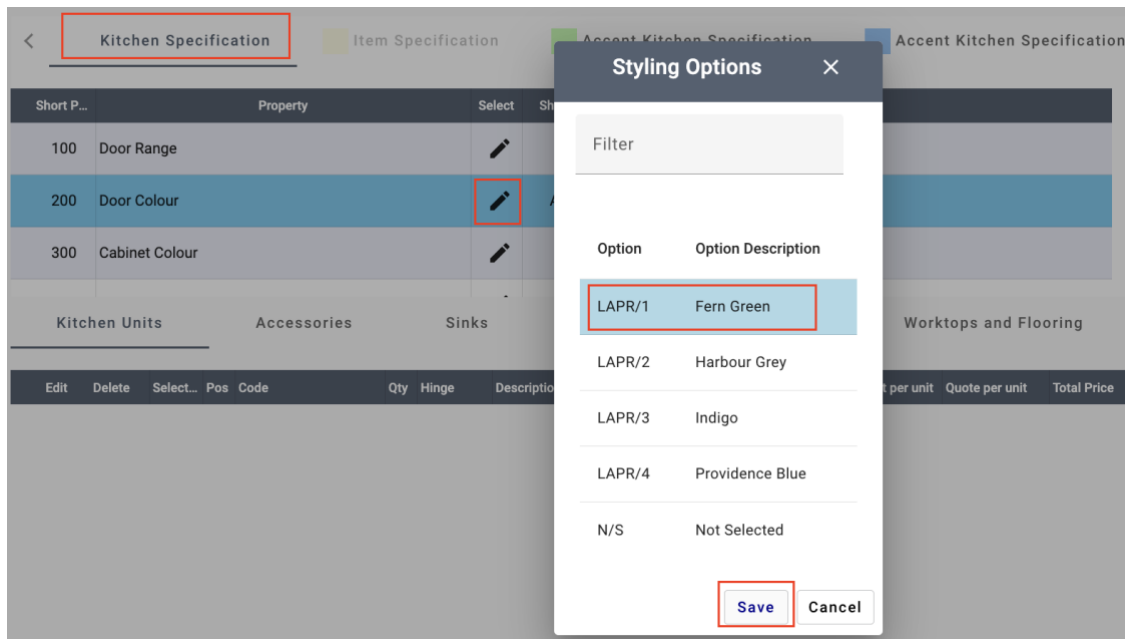
6. The KBBConnect system will now match all imported codes / descriptions and price all items in the quote according to the on-line supplier pricelists and the margins you have set.

Unrecognised Items

KBBConnect recognises imported items by matching the item's description to your suppliers' pricelists. If a description from CAD is not recognised, the system will leave the imported data unchanged, but highlighted in a <mark>Yellow colour</mark>, as shown in the example below:

In the example above, KBBConnect does not recognise these items, so the codes remain Yellow and the prices are displayed as zero. To replace unrecognised items, search for them using the **Edit**
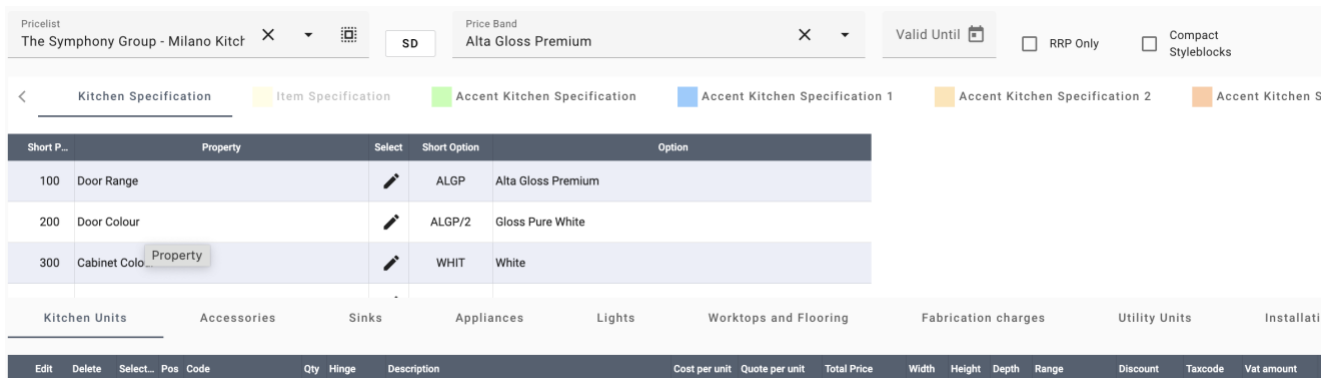
button, which will display your supplier's pricelist, from which you can choose the remaining items you require.

The next time you bring in the components that were not initially recognised, they will be replaced by KBBConnect with the correct supplier codes. To understand how this works, see the following section on the KBBConnect Knowledge Base.

Importing CAD files into KBBConnect using XML Export

Once you have finalised your CAD drawing:

1. Click on the XML Export button at the top of your screen.

2. A save XML file window dialog will appear

3. Type in a unique file name keeping the '.xml' extension

4. Save the file in a known location.

5. Open KBBConnect

6. Create a new quote or open the quote that you wish to import your Fusion XML CAD file. Note the quote must be **empty** of furniture components for the CAD file to import.

7. **Ensure** that you select the correct supplier/pricelist before you start the import process.

8. Select the **CAD Import** button from the **Tasks** Menu.

9. Once you have selected the CAD Transfer dialog box will appear.
   Select **FUSION XML** from the CAD file type drop down list.

10. Click on **Choose File** and select the XML file you have saved.

11. Once you have chosen the file to Import the system will automatically start to transfer the items into KBBConnect. All items which will be displayed in **Yellow**, indicating zero price

12. Click on the **REPRICE** button $\circlearrowright$ **RePrice** on the **Tasks** menu.

13. The KBBConnect system will now match all imported codes and price all items in the quote according to the on-line supplier pricelists and the margins you have set.

Unrecognised Items

KBBConnect recognises imported items by matching the item code to your suppliers' pricelists. If a code from the CAD package is not recognised, the system will leave the imported data unchanged, but highlighted in a <mark>Yellow colour</mark>, as shown in the example below:

In the example above, KBBConnect does not recognise these codes, so the codes remain in colour

prices displays as zero. To replace unrecognised items search for them using the **Edit** ✏ **button**, which will display your supplier's pricelist, from which you can choose the remaining items you require.

Older Versions of Fusion / Planit

In older version of the software, neither the KBBConnect **Seamless Link** button nor **XML Export** button are not available. However, the XML export button can be installed in some older versions, by contacting 20-20 Technologies, on +44 1233 (0)635566.

If you are unable to obtain the XML export, it is still possible to import your Fusion design, as follows, using the text file import process:

Exporting a Fusion Text File for Pricing a Quote in KBBConnect

1. From the toolbar menu, click on **View** - **Items List**

2. Select on the **Field Chooser** button
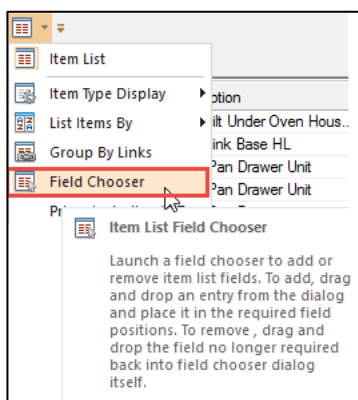
and you will see a list of available fields

NOTE: In older versions of Fusion it displays as an '**eye**' button

3. Move the columns using the Field Chooser so that they are displayed in the order shown:

- Position Number
- Quantity
- Order Code
- Handing
- Description
- Type
- Order Size (or Dimensions)
- Price (no VAT)
- Manufacturer

4. Place a tick in the **Show alternative units** box

- No other tick boxes to be checked

5. To export the file from Fusion, select **File → Export**. Give the file a name and save the file on a drive where it can later be imported into KBBConnect.

To import the file into KBBConnect

1. Open **KBBConnect**, and create a new job

   NOTE: To import from your CAD Package the furniture section of your quotation document must be empty.

2. Choose the Supplier and Range of furniture you have used in Fusion

3. Click ⤓ CAD Import from the menu on the left:

4. A the following dialog box will be displayed

CAD Transfer	✕

Fusion XML ▾   ☑ Import Codes   ☐ Import Prices   1

How to Export   Choose File   Cancel
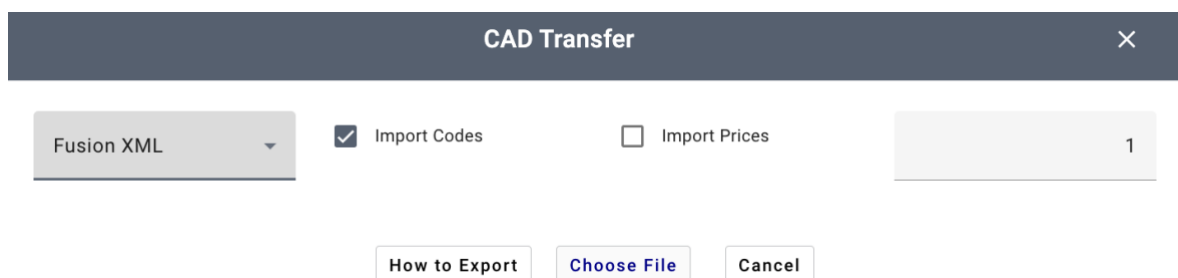
5. Chose **Fusion** only from the drop-down list and then click on **Choose File**

6. Use the window to find the file that you exported from your CAD and click open.
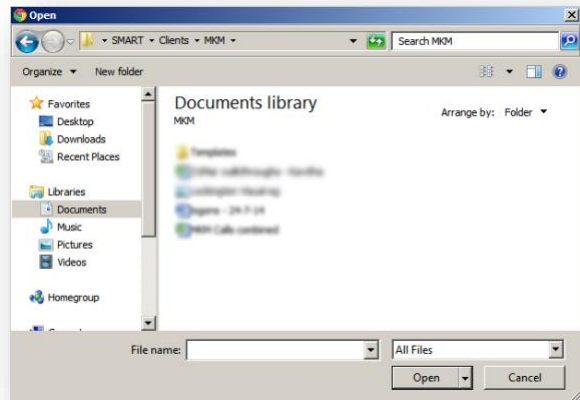
7. Once the file is imported:

If the codes from Fusion are the codes you recognise in your KBBConnect pricelists:

- Click on the **Re-Price** button in the **Tasks** pane. This will start the comparison of the items by looking in the pricelist database for items that match.

- If any items are not recognized (items will display in an ==Yellow colour==, meaning that their codes are not currently in the pricelist database) these need to be added from the pricelist using the

   Edit ✏ **button**.
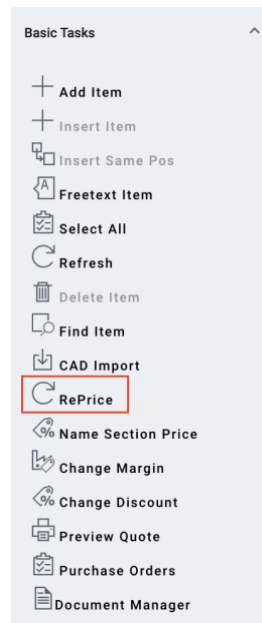
   If the codes from Fusion are generic codes which will not be your supplier pricelists:

- Click on the **Recognize** button within the Advanced Tasks Pane

- This will teach KBBConnect what items to use, next time you import and click **Recognize** it will remember the choices you have made.
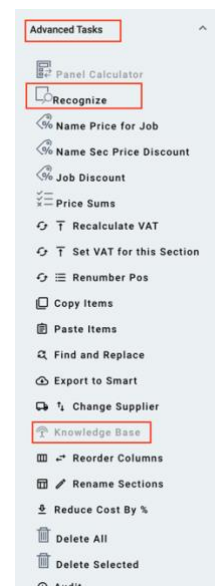
Using the KBBConnect Knowledge Base

In some cases, not all of the items you are importing into KBBConnect from CAD will be recognised, due to incorrect generic descriptions.

Within KBBConnect, each time you correct a mistaken furniture item by selecting the correct item, it will keep a log of this within the system's **Knowledge Base**.

You can access the Knowledge Base to check what has been stored by you and other KBBConnect users in your company:

1. Within your **Quote** screen, click on the item that you want to check
2. select the **Advanced Tasks** pane
3. Select the **Knowledge Base** command
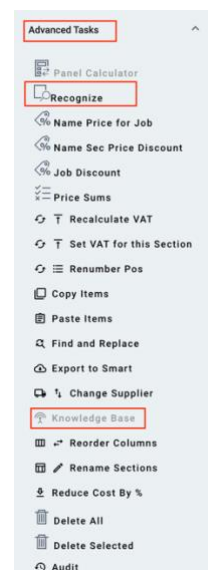
4. The following dialog box is displayed, showing in this example that an item has been matched a total of 4 times, 5 times to BU56F. It is therefore this item that will be inserted into your quote every time the item comes across from CAD.

Code	Description	Qty	Generic Description
BU56F	Base Unit F/HT 500/600/870	5	500.0 base unit f.h.d., height:720.0, depth:600.0
BU66F	Base Unit F/HT 600/600/870	4	500.0 base unit f.h.d., height:720.0, depth:600.0
BU36F	Base Unit F/HT 300/600/870	3	500.0 base unit f.h.d., height:720.0, depth:600.0
WU472P	Wall Unit 400/330/724	2	500.0 base unit f.h.d., height:720.0, depth:600.0

NOTE: If, by mistake, the wrong item is brought in, delete it from the Knowledge Base by selecting the item and then clicking on the **Delete** button. Like the item BU66F and BU36F are the wrong items for generic description - 500 base unit

Feedback

We hope you found this document useful and would love to know what you think of KBBConnect.

To comment on this Quick Guide or anything else regarding KBBConnect, for help, or for information regarding on-line training courses, please contact KBBConnect Customer Support:

e-mail us at: clientcare@smart-systems.co.uk

or

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