Component Edit Wizard

SUMMARY

This wizard allows you to change many properties in 'groups' of components. There are options to change General Details, Text Replacement, Estimating & Ordering Details, General Ledger Links and Cost Centre Links.

From within the **General Details** the following options can be altered:

- Brand Name
- Manufacturer
- Category
- Classification
- Size – Height, Width and Depth

The options for **'Text Replacement'** are the same as in 2.7. We can replace text in Description, Brand Name, Model, Manufacturer and Colour.

From within the **Estimating & Ordering Details** the following options can be altered:

- Supplier Price Used
- Estimating UOM
- Ordering UOM
- Round to next figure
- Calculation routine
- Conversion factor
- Default GST code

From within the **G/L Links** the following options can be altered:

- Revenue account link
- Expense account link
- Asset account link

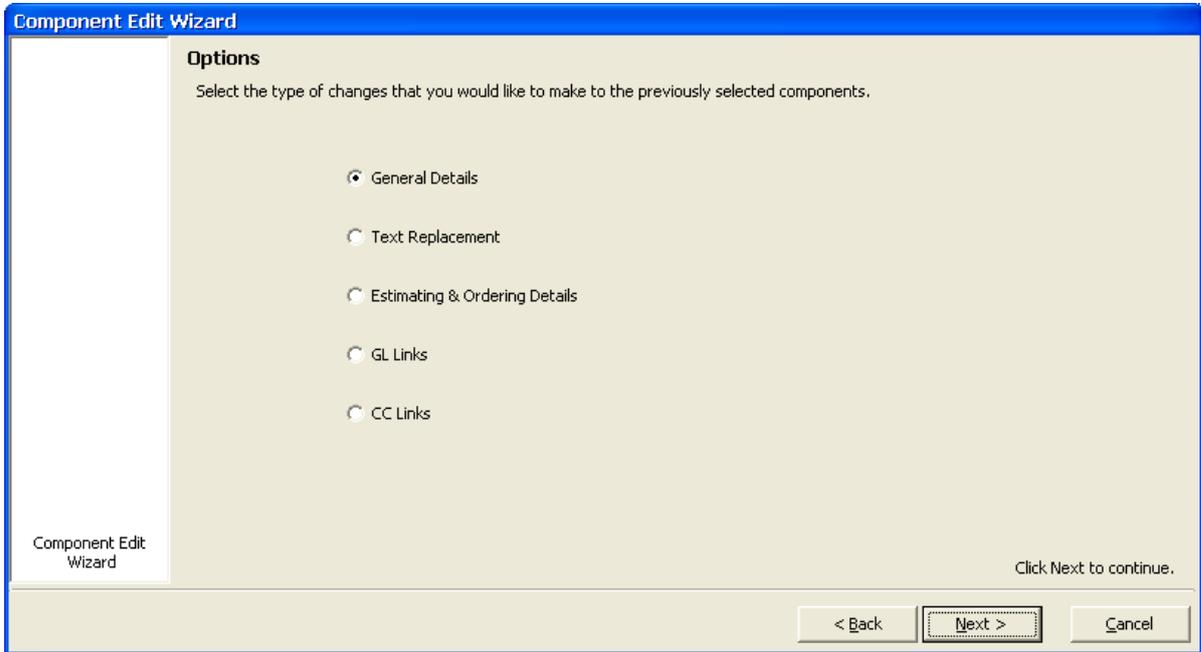 Note: You can assign accounts to a selected

From within the **Cost Centre Links** you can group select and choose a cost centre from any Construction Type to be allocated to the selected group.

The Process

This Component Edit Wizard now replaces the 'Replace Text' wizard which was available in the component summary screen in version 2.7. The text replace option still exists, but is now replaced with several more options to make altering your list of components on a 'global' scale easy.

To find the wizard, open the 'Component Summary'. You will see that the 'Replace Text' wizard has now been replaced by the 'Component Edit Wizard'. To activate the wizard you must select at least one component or a group of components, and then click the 'Edit Wizard Button'. There is no limit to how many components you can select at any one time.
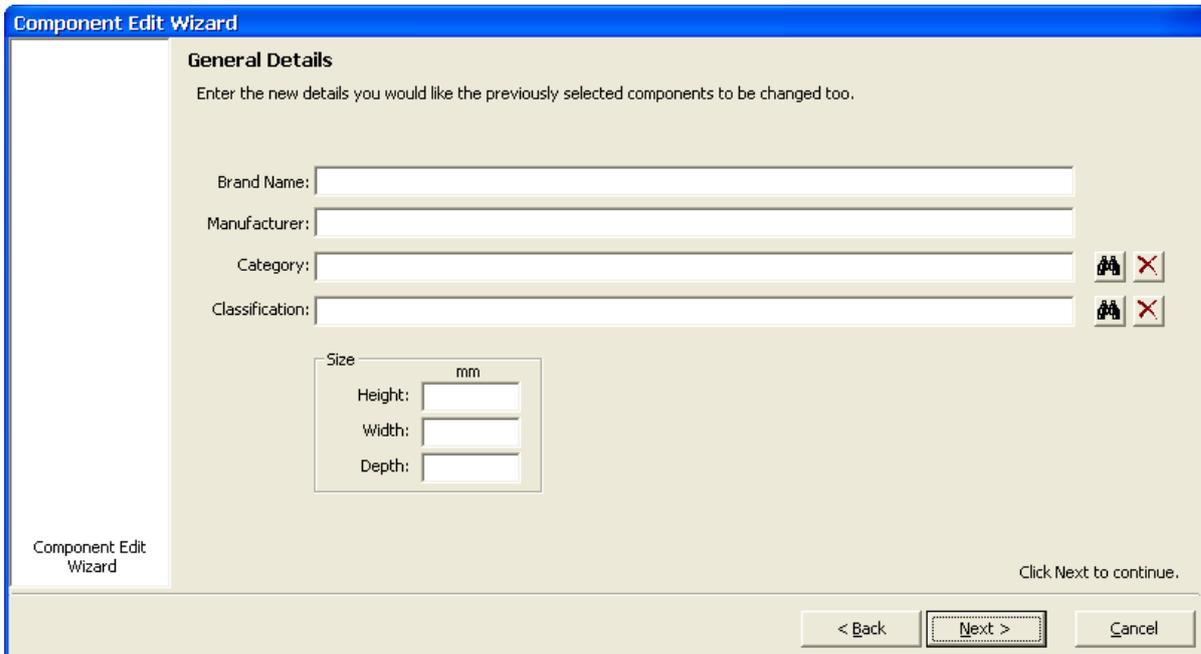
Highlight a component, start the wizard and click 'Next' to the Welcome Screen. This will bring you to the 'Options' screen. This screen gives you all the options that you can choose to alter your selected group of components.

Highlight 'General Details' and click 'next'.

These are all of the **'General Options'** you can choose to change in your group of components selected.

You can add but not remove a 'category' or 'classification' from a group of components. The remove button only allows you to remove from the current selection in the wizard

Go back to the 'Options' screen and select 'Text replacement'. This screen allows you to change the text in any of the checked columns. The text in the 'Text to Replace' field does not need to be case sensitive, but the 'Replacement Text' will need to be 'as you require' it to look.
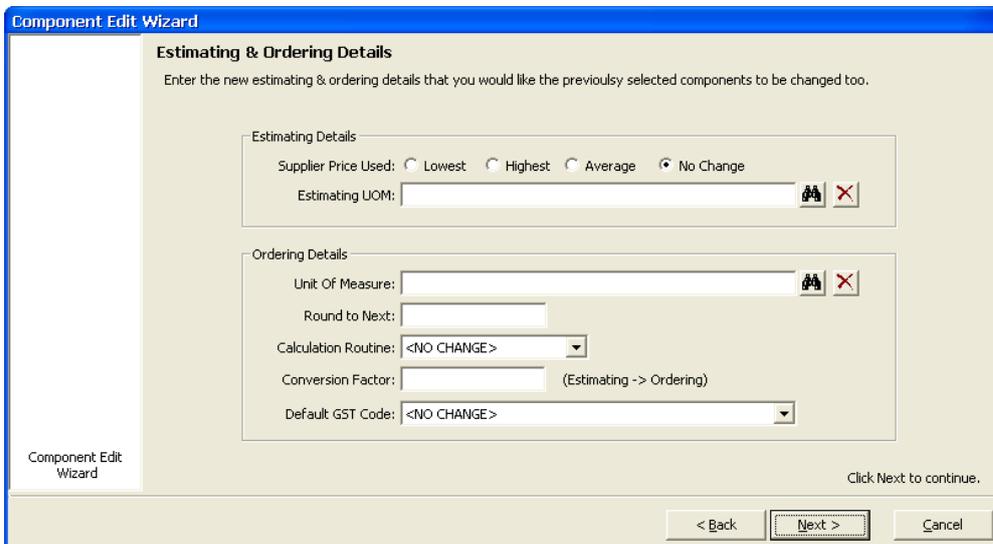

Go back to the 'Options' screen and select 'Estimating & Ordering Details'. There are quite a few options to choose from in this screen. There are two options to choose from in the Estimating Details section. 'Supplier Price Used' and 'Estimating UOM' (Unit of Measure). The 'delete' button on the Estimating UOM field only allows you to remove the selections you have made in this screen.

There are also multiple 'Ordering' details that can be changed. UOM, Round to next, Calculation Routine, Conversion Factor and the Default GST Code. Multiple selections from either of these details sections can be chosen in the one round of changes.
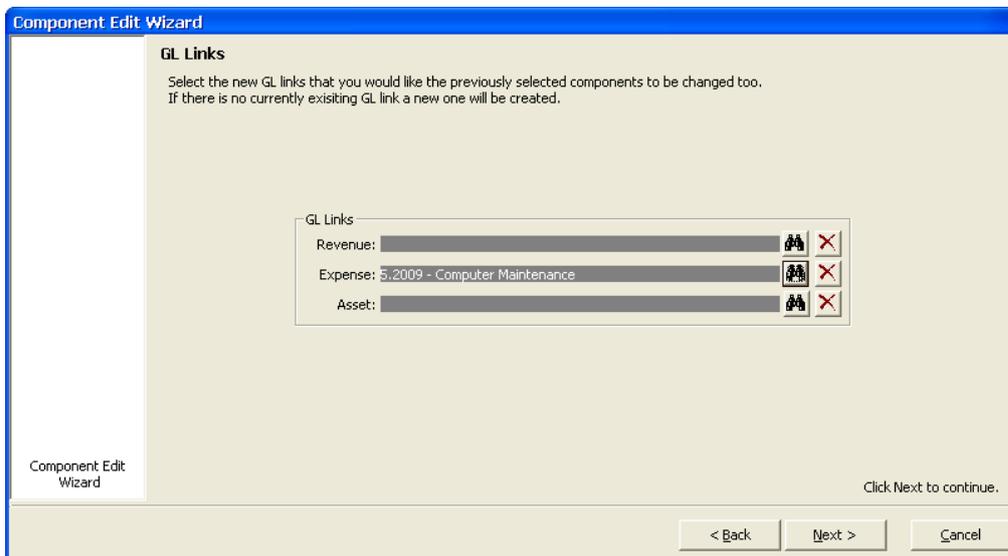
Go back to the 'Options' screen and select 'GL Links'. This screen will allow you to select a 'Revenue', 'Expense' or 'Asset' account, to link the component to. Be careful that you choose the correct one as you cannot 'group' remove links from components. The remove buttons are only for removing selections you have made in this screen.

Go back to the 'Options' screen and select 'CC Links'. This screen allows you to assign cost centres to 'groups' of selected components. This is the first time this feature has been available in Constructor and is a powerful addition to the wizards. This feature allows you to organise your cost centre layout quickly and efficiently. You can also choose to make the changes in any of your 'Construction Types', by selecting them using the lookup button.