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Introduction

terminal is a configurator for easy planning of:

- KNX projects
- free@home projects
- electric standard installation projects

It automatically compiles all the necessary components and offers at any time a binding price statement. Out of the planning various documents are created such as a detailed device list or a specification for installation.

The planning process takes place online and requires registration. The operation of the configurator has been optimized for use on the PC as well as on tablets with touch display.

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System requirements

To use the configurator, a current web browser on a PC or tablet is required.

Supported are the current version and the previous version of:

- Microsoft Internet Explorer
- Mozilla Firefox
- Google Chrome
- Apple Safari for iPad
Legend

In the configurator the following icons are used to invoke actions:

**General**

- **Options**
  The menu for settings and help calls appears by using this icon in the upper right corner. Furthermore, you can log out of the configurator or contact us.

- **Add**
  Creates a new item (for example, building, room, location, etc.).

- **Edit**
  By clicking this button the current item can be edited.

- **Duplicate**
  Click this icon to duplicate the current element.

- **Delete**
  Deletes the displayed item.

- **Drag and drop zone**
  According highlighted items can be moved via drag and drop into other areas or their order can be changed.

**Building topology**

- **Building**
  Identifies a building.

- **Floor**
  Identifies a floor.

- **Floor with a distribution box**
  Identifies a floor with a distribution box.

- **Room**
  Identifies a room.
Room configuration

Location
Identifies a location.

Switch
Identifies a switch at the location.

Socket
Identifies a socket at the location.

Network socket
Identifies a network socket at the location.

Other device
Identifies other devices at the location.
Settings

The settings can be accessed via the icon in the upper right corner. The settings listed here apply to all of the current user projects.

Company logo & watermark

Here you can specify your company logo and a watermark text. If this option is active, all of the requested documents are provided with the specified logo and watermark.
Creating and managing projects

Project overview
After logging on to the system you get to the project overview. All projects / buildings which you have created are listed here.

<table>
<thead>
<tr>
<th>Project/Building</th>
<th>Manufacturer</th>
<th>Changed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Testproject</td>
<td>ABB</td>
<td>12.04.2016</td>
</tr>
<tr>
<td>Project 01</td>
<td>ABB</td>
<td>31.03.2016</td>
</tr>
<tr>
<td>Project 02</td>
<td>ABB</td>
<td>31.03.2016</td>
</tr>
</tbody>
</table>

Creating a new project
To create a new project, click the button with colored background "Add new project" in the lower area.

Filtering and sorting project
It is possible to filter according to the project name (see filter box at the top right), and to sort by project type, project name, manufacturer or date modified (by clicking on the arrows in each column).

Requesting a project
By clicking the envelope icon you may request documents (for example a specification for installation) for the relevant project directly from the overview.
Selecting project type and manufacturer

If you want to create a project, you can select the manufacturer and / or the desired project type.

In this area you have the possibility to choose between the predefined project types and create your desired project. The individual types of projects offer versatile options for planning your project individually based on a preferred manufacturer.

If you select the option 'sample projects', you can choose between predefined sample projects and use one of them as a template for new projects.

The following menu items are available at this place:

**KNX**
In this area you can create a KNX project based on your preferred manufacturer.

**free@home**
At this point you have the option to create a free@home project.

**Standard installation**
Within this area it is possible for you to create a project for electric standard installation.

**Sample projects**
Using this option you can select predefined sample projects as a template for new projects.

On pressing the button "Create project" the new project is created and you will be taken directly to the details view.
Project details

After creation of a new - or when you open an existing project - you get to the detail view. On the left side the structure of the project is displayed. In the right pane you have the possibility to define information about the project and other options.

Depending on the project type some of the information or options are not available.
Basics

Project type

In this area basic options of the project can be determined. The preferred manufacturer can be chosen here in addition to changing the name as well as adding remarks on the project.

The first tab within the basics indicates the selected project type.

The selected manufacturer will be used by the configurator for actuators as well as a proposal for the sensors in the rooms.

Depending on the switch range a special frame color for the switches and sockets can be determined.

As seen in the picture above, a button "Further options" is available in addition to the mentioned items. These will be described in the following section.
Further options

Within the extended options it is possible to make additional basic settings.

**Extended options (Tab 'General')**

In the tab "General", you find - among other things - the items "Include weather station" or "Include tubular motors".

**Extended options (Tab 'Heating')**

Within this screen specifications of the project can be set. For example you could select, which night and comfort temperature are used as a default, and whether valve drives should be included in the project.
Calculation

In the tab "Calculation" exists the possibility to set options whether prices for construction, programming and installation are considered calculating the current project price. These items give the opportunity to add these prices to the advertised price of the current configuration. You can define an hourly rate for each option.

On this screen a button "Further options" is available too in addition to the above mentioned options. They will be described in the following section.
Further options

The advanced options of the tab "Calculation" allow you to define additional calculation options or to edit them. You have the option to set factors and surcharges to be added to the costs. The additional costs and surcharges are given in percent, construction and programming are given with factors.

<table>
<thead>
<tr>
<th>General</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Factor construction</td>
<td>1,00</td>
</tr>
<tr>
<td>Factor programming</td>
<td>1,00</td>
</tr>
<tr>
<td>Surcharge article</td>
<td>0,00 %</td>
</tr>
<tr>
<td>Installation/additional costs</td>
<td>40,00 %</td>
</tr>
</tbody>
</table>

Extended calculation options (Tab 'General')

Here you see among other options "Surcharge article" or "Installation / additional costs".
Project info

On this tab further information can be given to the project such as customer and project no.. The e-mail address of the end user can be entered here. It appears on the front page of the project documentation.

<table>
<thead>
<tr>
<th>Basics</th>
<th>Project info</th>
<th>Preliminary notes</th>
<th>Devices</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td>Customername</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact</td>
<td>Contactname</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Street</td>
<td>abstreet 12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zip code, City</td>
<td>01234 City</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:CN@exmail.com">CN@exmail.com</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project No.</td>
<td>001</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Newcity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Installation</td>
<td>C.N.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clerk</td>
<td>D.N.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Preliminary notes

In this area the preliminary notes for the specification for installation are shown.

When you create a new project a standard text is defined - available in English or German depending on the chosen language. Within this form you can add remarks, or replace the content completely with your own text. By clicking the button "Load default text" the text is reset to the default text.
Devices

On the tab "Devices" the devices are listed, which are required for the current configuration (for example, actuators, etc.).

Some devices have more information available via a link (underlined items).

The devices listed here are automatically determined by the configurator based on the configuration you have made.
Configuring building system technology

Building system technology projects are configured within the building structure.

Creating floors

To add floors to a building, in the left pane click the plus icon to the right beside the building name.

In the appearing menu you have the option to create or copy an empty floor or a floor from a template. In the templates there are predefined floors (for example, for an office or an apartment) or floors from other projects which may already contain rooms and devices. More information about templates follow in the chapter Adding floors/rooms from templates or other projects.

After creating a floor, in the right pane you can establish a name for it, and if necessary, specify remarks and the distribution box to be used.
Distribution box on floor level

For each floor a separate distribution box, a so-called floor distribution box, can be generated.

When creating a new floor this option always shows "- main distribution box -". There is also the possibility to use a distribution box of another floor. All floors with own distribution boxes are indicated by the icon 📦.
Changing the order of floors

Floors can be selected by clicking on the entry in the left pane.

In the right pane you then have the ability to adjust the position of the floor in the project by means of the "Order" field. Alternatively, you can change the order by drag and drop. Drag the floor by the drag and drop area (icon to the left of the floor description) onto the desired position.
Creating rooms

By clicking the plus icon to the right beside the floor name new rooms for this floor can be created.

As with floors you have the possibility, in addition to an empty room, to choose a predefined room from a template (for example, office, toilet, etc.) or a room from another project.

The created rooms are always sorted alphabetically and displayed below the associated floor.

Already created rooms can be moved via drag and drop to another floor. Simply drag the room by the icon onto the desired floor.
Editing rooms

Select the desired room on the left side to edit information for it.

In addition to the name of the room and comments a room type and an amenity value can be selected. Based on this selection suggestions for room functions are created in the upcoming room configuration.
The tab ‘Switch range’ offers the opportunity to select a switch program different from the one used by the building.

To complete this, the manufacturer as well as the switch program to be used has to be selected (including selection of the switch and frame color).

The default is ‘- automatic -’. This means that the preferred manufacturer (determined by the settings in the basics of the project) is used for the switch range. Then always the default program of the manufacturer is used.
**Add / edit functions for the room**

By clicking the button "Room configuration" you get to the individual configuration of the room.

Here you can manage room functions and sockets as well as related actions (add, delete, assign). Multi-room, building-related scenes can be managed here too.

After clicking the button "Add functions" you get to the individual selection of the desired room functions.
In the left part the categories are listed, and subcategories as well as the related functions are displayed (depending on the selection).

The available range of functions depends on the selected project type.

A function is selected by a single click on the appropriate line. Each additional click increases the number by 1.

You can set the desired number by clicking on the number and subsequent manual input.

An input of 0 results in the removal of the function out of the selection.
A special position is occupied by the category 'Favorites / suggestions'. When opening the window it appears always in the first position and is therefore easily accessible.

- **Favorites**: Each function can be declared as favorite by pressing the icon ★. The icon changes color (★) and appears from this moment on the list of favorites. Pressing again on ★ removes the favorite state. The selected favorites are available for the current project.

- **Suggestions**: Suggestions will be determined by the choice of room type and amenity value and are available for selection.
After completion of selection the import process starts by pressing the button "import".

<table>
<thead>
<tr>
<th>Favorites / suggestions</th>
<th>Other (1)</th>
<th>Other (1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sockets</td>
<td>Electric circuits, switched</td>
<td>1</td>
</tr>
<tr>
<td>Lighting (1)</td>
<td>Standard installation functions</td>
<td>0</td>
</tr>
<tr>
<td>Shading</td>
<td>Electric circuits, switched</td>
<td>0</td>
</tr>
<tr>
<td>Devices (1)</td>
<td>Electric circuits, switched</td>
<td>1</td>
</tr>
<tr>
<td>Climate (1)</td>
<td>Electric circuits, switched</td>
<td>0</td>
</tr>
<tr>
<td>Security</td>
<td>Electric circuits, switched</td>
<td>0</td>
</tr>
</tbody>
</table>

When importing, the necessary actions for the selected devices are automatically created and are after that available in the room configuration.

After completion of the import process, the assigned functions are displayed in the "Functions and sockets" list of the room.
Configuring rooms

By clicking the button “Room configuration” in the desired room you enter the room configuration.

The existing functions in the list may be renamed by clicking the pencil icon (for example, “light 01” in “light ceiling”). This is also possible by clicking on the text. The Tab key can be used to jump from one entry to the next.

Functions no longer needed can be deleted via the icon .

In the case that a lot of functions / sockets, actions or scenes are present, filtering can be used. The filter terms offered adapt dynamically, i.e. only the groups that are present in the room are offered.
Drag and drop operation

To operate the selected functions with their actions, switches must be placed on locations, sockets have to be installed, etc. Locations can be created manually, see: Creating locations. Afterwards functions, actions and scenes can be assigned.

It is easier, however, to use drag and drop. Using the tabs "Functions and sockets", "actions" and "scenes" these activities can be carried out.

Elements eligible for the assignment are represented by the icon . When an assignment is not possible any more (for example, a socket can only be placed at one location), the icon disappears.

There are two ways to carry out the drag and drop - action:

1. An item can be dragged to existing locations. Then it is inserted there.
2. An item can be dragged to the empty space below the room / last location. This creates a new location.
Actions

The actions that are available in the room, are derived from the existing functions and sockets. Therefore, there is no way to create new actions. Many actions can be repeatedly attached to sensors, indicated by the icon (e.g. several switches for a light)

Room actions

The actions can be assigned to an location via drag and drop (as described in the previous chapter).
Scenes

On the tab "scenes" of a room it is possible to create scenes. Scenes can be used in the whole project for assignment to sensors.

To create a scene, click the button "Add scene". Existing scenes can be edited by clicking the pencil icon in the list.
In addition to a name and remarks for the scene, you can assign multiple actions to the scene. To do this, click the white plus sign in the area "Assigned actions".

In the upper part of the screen you can select the floor and room where the scene to be assigned is located. Assigning the scene is done by simply clicking on the corresponding checkbox in the list. Additionally the desired value (example "ON", "OFF", etc.) can be selected or entered for some actions.
Creating locations

In the room configuration the plus icon to the right behind the room description can be used to create locations (for example "door" etc.).

The possibility to create locations by drag and drop has been described in the previous chapter: Drag and drop operation.
Location (simple configuration)

In addition to assigning a name and possible remarks, you could - depending on the project type - specify how this location is to be controlled. For example there is a choice between push-switches or a touch panel.

If the location is operated via sensors (for example, push-switches, switches and control elements) or if you would like to add a socket to the location, you can open the assignment mask by clicking the button "actions / scenes / sockets assign" in the lower part of the screen.
Assign actions to location

To assign an action / scene (for example "blind 01 control", "light 1 switch") to the installation site, simply select it with a click on the corresponding checkbox in the appropriate category. To place a socket, switch to the tab "Sockets".

All actions / scenes and sockets assigned to a location are displayed as an overview in the tab "Assigned".

The configurator determines based on your chosen switch range together with the assigned actions and scenes automatically the required sensors and room temperature controllers.
Location (extended configuration)

By checking the option "Extended configuration" within the location, advanced configuration for sensors of the current location is activated.

The advanced configuration offers the ability to manually add sensors and validate the rockers / switches individually or adjust options.

To add a sensor, on the left pane click the plus icon to the right of the name of the location. By using the "Sensor" button a standard push-switch is inserted in the location (for example, "1-gang push-switch"). The type of the inserted push-switch can be adjusted on the right hand side, and its configuration can be changed as well. You can place existing sockets and network sockets or add new ones as well.

Existing sensors can be selected in the extended configuration on the left side below the location. They can be moved to other locations in the same room using drag and drop (icon to the left beside the description). In the right pane the switch type, the installation height and position, the action assignment and further details for the push-switch can be set.

Using the tab "Assignment" you can specify the mode (rocker mode / button mode) for the control element and adjust the allocation of the individual rockers. To assign an action or scene to a rocker / button, click the pencil icon on the rocker / button.
In the appearing dialog you can select in the upper left area, whether a scene (building) or action (room) should be assigned.

If actions were chosen, it may additionally be selected from which floor / room an action should be assigned. By clicking the arrow icon the selected scene or action is transferred to the rocker or button.

Details of a control element in extended configuration

On the tab "Details" further specifications can be stored for the control element. Beside remarks, fields for LED use and display are available. Depending on the project type some items may not be available.
**Touchpanel (in KNX-projects)**

If the location is operated via a touch panel, you have the option of associating actions and scenes in the lower area.

Operating via Touchpanel

Click the button “Actions/scenes assign” to assign actions and scenes.

In the selection fields of the dialog box that appears, can be decided whether actions / sockets (room) or scenes (building) are to be assigned.

Select action/scene

For actions / sockets, you also have the option to select the floor and the room in which the action / socket to be assigned is located.

The assignment is made by simply clicking on the corresponding checkbox of one or more actions / sockets or scenes from the list.

If no action / socket or scene is assigned to a touch panel, the configurator assumes that all existing actions / sockets and scenes are served via the touch panel.
Adding floors/rooms from templates or other projects

Working with pre-defined templates facilitates the creation of the building structure. Apart from predefined system templates floors and rooms from your own projects can be used as a template.

Thanks to flexible failover options preconfigured elements including the contained functions and locations can be imported into the target project. With the conversion option you can quickly create variations of a project using different installation systems.

Selecting floors/rooms

To import floors or rooms from templates or existing projects, click the plus icon at the level of the project where you want to add more items and then select “Floors from template” or “Rooms from template”.

---

Select floor from template

Select room from template
Floor from template

In the left pane of the appearing dialog you can select the template to use. System stored templates are shown in the first place using bold letters.

The selection list can be filtered by entering a search term in the filter box at the top left.

If you selected a project or a template from the list, the items for importing are displayed in the left pane. Use the button "back" at any time to go back to the list of projects / templates.
By clicking an item in the list it is transferred to the right pane. There all selected floors or rooms are listed.

It is also possible to select floors / rooms from different projects. To do this simply shift to the desired project in the left pane and by clicking add the desired elements. Repeatedly clicking the same element increases the number of elements to be transferred (shown in the right pane).

Using the icon , selected items are removed from the list.
Transfer options

It can be selected for each element, in which way it should be included in the target project (import options).

Selected Rooms:

<table>
<thead>
<tr>
<th>Room Type</th>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kitchenette</td>
<td>convert to KNX</td>
</tr>
<tr>
<td>Office 1</td>
<td>only structure/sockets</td>
</tr>
</tbody>
</table>

Establish transfer options

The options available for selection depend on the project type of the source and destination.

Import

Adds the element while maintaining the installation system from the source. Covers all room functions as well as the locations contained.

Convert

Converts the element to the corresponding one in the installation system of the target project. Covers all room functions, if they can be mapped into the destination system, as well as the locations contained.

The conversion option can be used to create variants of an existing project using different installation systems as well.

Only structure / sockets

Imports the structure from the source project (floors, rooms and locations) and the sockets contained. Other room functions and sensors are not adopted.
Overview of available transfer options depending on the project type

### KNX projects

<table>
<thead>
<tr>
<th></th>
<th>KNX</th>
<th>free@home</th>
<th>standard installation</th>
</tr>
</thead>
<tbody>
<tr>
<td>import from</td>
<td>✓</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>convert from</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>structure/sockets</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

### free@home projects

<table>
<thead>
<tr>
<th></th>
<th>KNX</th>
<th>free@home</th>
<th>standard installation</th>
</tr>
</thead>
<tbody>
<tr>
<td>import from</td>
<td>✗</td>
<td>✓</td>
<td>✗</td>
</tr>
<tr>
<td>convert from</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>structure/sockets</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

### standard installation projects

<table>
<thead>
<tr>
<th></th>
<th>KNX</th>
<th>free@home</th>
<th>standard installation</th>
</tr>
</thead>
<tbody>
<tr>
<td>import from</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>convert from</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>structure/sockets</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
Import process

After selection of the desired elements the process for importing into the current project can be started. To do so, click "import" button on the bottom right.

During the import process all selected items will be copied to the target project in accordance with the specified transfer option.

After the import has taken place, it should be examined whether all elements have been incorporated in the desired way and whether further adjustments to the project are needed (caused by the import).

Basic treatment during the import

Manufacturer / switch programs

- The import is principally possible independent of the switch program in source and target.
- If the switch range selected in the source is also available in the target, it will be kept.
- If the switch program in the source room is set to "- automatic -", it is kept during import. This results in a conversion to the program selected at the project level of the target - provided that this is different from that in the source project

Locations in simple / extended configuration

- The selection made in the source is - if possible - kept. An automatic change of extended configuration to the simple configuration takes place, if not all types of switches used for the location are also available in the destination. The check is carried out per location.

Touch panels

- Touch panels are kept when imported from the same installation systems.
o When converting free@home to KNX any selected touch panels are converted into the touch panel "standard small".

**Distribution boxes on floor level**

o Own distribution boxes will be kept as far as possible.

o Uses a floor a distribution box of another floor, it will be kept as long as this floor is imported too. If the floor with the distribution box, to whom other imported floors refer to, is not imported, the referring floors will fall back to the main distribution box.

**Flush-mounted actuator free@home**

o When importing from other free@home projects the selected flush-mounted actuators in the rooms are used if they are available in the destination switch program (currently the flush-mounted actuators in all free@home switch programs are available).

When converting to KNX the flush-mounted actuators which exist in the source are mapped to REG actuators.

**References to other rooms / floors**

o If an action of a room is served by another room, the reference is kept when the target is also imported. If the room with the serviced action was not imported, the reference is removed.

**Repeated import in one operation**

o If elements are imported several times (for example, 3x floor 1 from project 1), the subsequent imported elements are a copy of the first imported element.

**Naming of rooms and floors**

o The original naming of the imported floors and rooms is used if there is no element of the same name at the same level in the target. If in the target, for example a floor "floor 1" is present, floors contained in the import which are originally named "floor 1" as well, get a serial number added (eg "floor 1 (2)", "floor 1 (3)", etc.). The same applies to rooms to be included in an existing floor, but not for rooms on different floors.

**Building scenes**

o If a scene is served in a room to be imported, this scene is copied into the target project. Does this scene contain actions from rooms not imported, these actions are removed from the scene during the transfer.

**Import of switches and room functions**

o Switches contained in the source are included in the target project, if the import options are "import" or "convert". Using "Only structure / sockets" does not import any switches.

o Room functions of the source are kept as far as possible during the import, unless they are not excluded by the selected import option (for example, "Only structure / sockets").

o If no identical room function is available in the target system, a conversion into a nearby function is performed.
Reviewing and requesting the project

The current state of the project is indicated in the title bar of the configurator, based on the colors green, yellow and red of the button "review / request".

Display of the state in the title bar

Reviewing the project

By clicking the button "review / request" in the title bar the detailed information of the configuration can be displayed.

Configuration notifications

In the dialog box, all notifications of the current project are listed. Green notifications indicate hints. Yellow notifications may require your intervention. The errors in red notifications in the configuration must be resolved before a request of specification for installation is possible.

Some instructions are marked with an arrow icon 🔵. By clicking this icon you will be taken directly to the area to which the message refers.

Messages, behind which a 🔄-button is shown, can be marked manually as "checked". These checked messages are ignored when determining the project status (red, yellow, green), but can always be reviewed in the tab "checked". At this place they can optionally be set to "unchecked" again.
Pricing

Furthermore, the dialogue shows the price for the current configuration of your project.

Please review your configuration using the following notifications.

The indicated price (marked red) always refers to the current configuration. By this you always have a quick overview of the total price of the project.
Selecting documents/options for the request

The second step of “Review and Request” is to select the desired documents and options for the request.

In this form, you have the opportunity to send the selected documents to your e-mail address.

Once you have selected at least one document or an option, the next button is available and you can proceed to the third and final step.

Clicking the Info button of each option in the right part of the screen appears more information about the item that you have selected.
Available options

Device list
Includes all necessary equipment of the project including article numbers, descriptions and prices.

Specification for installation
All configured content and technical details are documented here. The specification forms the base for later installation.

Depending on the configuration chosen, some items may not be available.
Confirming request

Before the request of documents / options is submitted, other information and optionally the price of the request is shown.

Please confirm your request.

After request the selected documents will be sent to your email address.

Payment
If you are paying using PayPal you will be redirected to the portal of the provider and can enter your payment information there.
After payment the shipping of your requested documents is carried out together with a bill in the form of a PDF file to your e-mail address from the previous page.

Request
By clicking the button „Request now (with costs)” resp. „Request now” the request is initiated with the options you selected.
You can choose different payment options such as PayPal, debit or credit card.
Completion of the request

At the completion of the request you will get an overview of the operations performed resp. information about their state.

Your request was executed.

In a few minutes you'll receive the requested documents via email (address stored in the system).

Completion of request