

# **Creating a Kit for the Items Catalog**

Purpose: Kits are a great way to create consistencies when estimating. A kit can be labor only or can be combined labor and materials based upon a known production rate for production. Kits are used in conjunction with take offs when estimating Maintenance work or can be used separately when used in work order estimating.

## Prerequisites:

#### 1. Admin user

#### To create a kit to the catalog, follow these steps:

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	То	Do List				🌍 🔂		Administration	
		Date _	Subject	R	egarding			S 2 Curre I	User Settings
	Ì	02/15/18	Follow up on proposal		Acme University	*			
								14° F Sunny	42° F Partly Cloudy
								View	<u>Forecast »</u>
						T			
	Re	Recent Activity   Acme Food - 1473 - Shrub Replacement   Busch Brewery - 1577 - Shrub Replacement			Customer Issues				Ð
					3				
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	1	Cathedral Basilica	a						

1. Hover over the username and select Administration.



A	Administrati	on				ج 🧐 ۶	Benjamin
	System Overview	v 🥺 🏹 🔢	1 🦧 🍘 ·	$\sqrt{x}$	CRM	ar 🗿 🕽	1
	Estimating	se 🖉	/ 🖻 🧯	2 🗐 🖶	Scheduling	<b>S</b>	
1	Purchasing				Organization	1 🖉 📀	
	Equipment	by 🔩 🖉	🔺 🚵 🕥	20			
	4						

## 2. Press the blueprint icon.

🗧 Item	IS			٩	, 🦻 🔁 🔲 Benjamin				
Search Items		Refault Search [S	Ð						
					New Labor				
Drag a col	Wew Material								
۲ 🗖	Item Name	Category Name	Item Type	Purchase Unit Type	New Equipment				
	1 1/2" 45 Ell Sch 80 PVC (S.S)	Irrigation	Material	Each	New Other				
	1 1/2" 45 Ell Sch40 PVC (S.S)	Irrigation	Material	Each	\$1.073				
	1 1/2" 45 EII UVR (S.S)	Irrigation	Material	Each	\$3.640				
	1 1/2" 90 Ell Sch 40 PVC (S.S)	Irrigation	Material	Each	\$0.760				
	1 1/2" 90 Ell Sch 40 PVC (S.T)	Irrigation	Material	Each	\$0.990				
	1 1/2" 90 Ell Sch 40 PVC (TBE)	Irrigation	Material	Each	\$2.069				
КК	1 - 20 of 2016 items								
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3. Hover over the green plus and select New Kit.



# Kit   **New**											
Item Name	Patio				Active 🕑						
Alternate Name	Patio				Available to Bid						
Category 5	Hardgoods				Force Single Unit Pricing						
Unit Type 6	Sq Ft 🔹 🗸				Takeoff Item 10 Select One ~					~	
Assigned Branch	All Branches				7						
Item Name		Туре	Factor	Units	Invert	Waste %	Unit Cost	Extended Cost			
Labor - Enhancements		Labor	1.0000000	Hours / Sq Ft		0.00%	\$14.000	\$14.00	8	*	
Gravel Crusher Run		Material	1.0000000	Sq Ft / Cubic Yards	\$	0.00%	\$25.000	\$25.00	8		
Sand		Material	1.0000000	Sq Ft / Cubic Yards	\$	0.00%	\$12.000	\$12.00	8		
Brick Paver		Material	1.0000000	Sq Ft / Each	2	0.00%	\$0.900	\$0.90	8	Ŧ	
Add a new Item or Kit						\$51.90					
11		12		13	14		15				
<b></b>											

- 4. Type in the Kit's Name in the Item Name Field. The Alternate Name will copy and can be edited if the naming convention is unique.
- 5. Select an Item Category. Common categories include: Maintenance, Irrigation, Enhancement, etc. Category is a way to group like kits under a single division or work unit.
- 6. Select how the kit should be measured. This unit measure correlates to the production factor determined by production.
- 7. Assign the branch for where the kit will be available. Leave blank if available to all branches.

Note: only use a branch if advance branch set up has been established under the company configuration tab.

- 8. Select the checkbox if the Kit can be used in estimates to bid.
- 9. If desired, check the Force single unit pricing box. This is helpful for planting material kits and construction. Click for more information on <u>Single Unit Pricing</u>.
- 10. If the pricing will be based on a Takeoff Item, then select the Takeoff Item.
- 11. Select the Item(s) that will belong in the kit.



- 12. Enter the production factor for each item based upon the unit measure selected.
- 13. Flips the Units calculation.
- 14. Allows a waste factor for the item in the estimate. *Example: brick pavers are estimated based upon the square footage of the patio however because of cuts needed it has been determined that there will be 10% waste from those cuts. This factor will allow for that waste when estimating and purchasing.*
- 15. Save the Kit.