

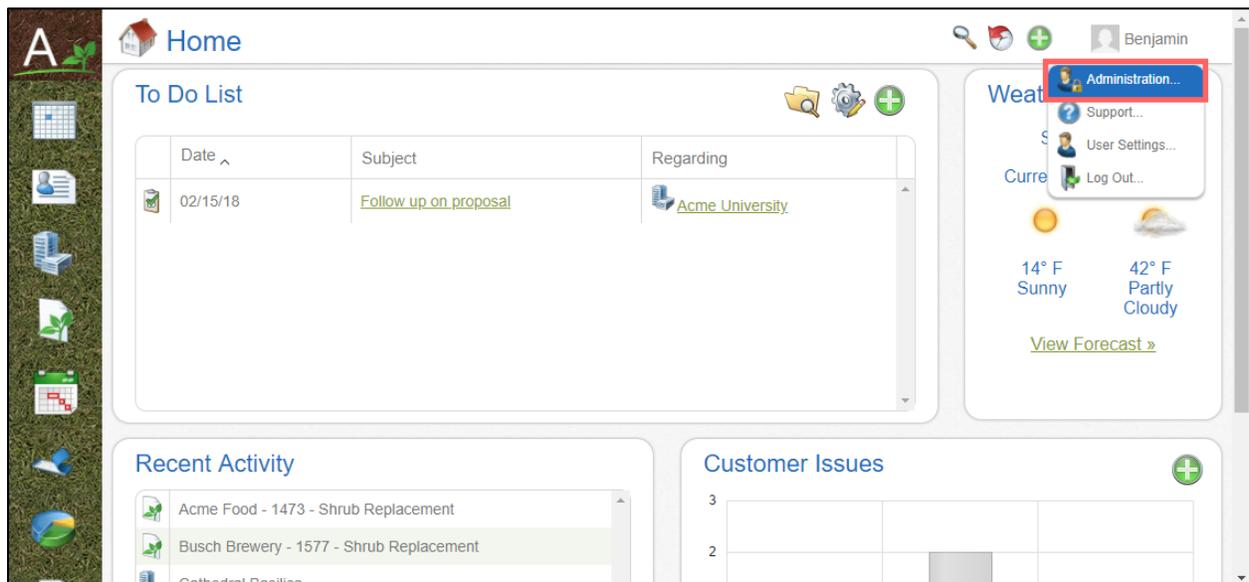
Creating a Kit for the Items Catalog

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.

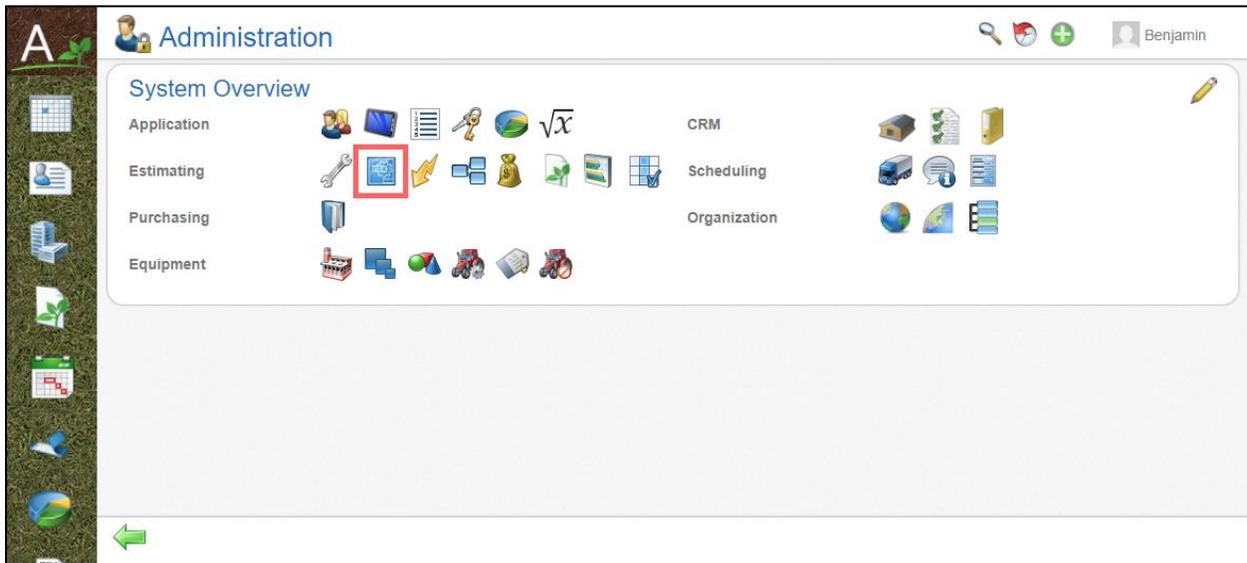
Prerequisites:

1. Admin user

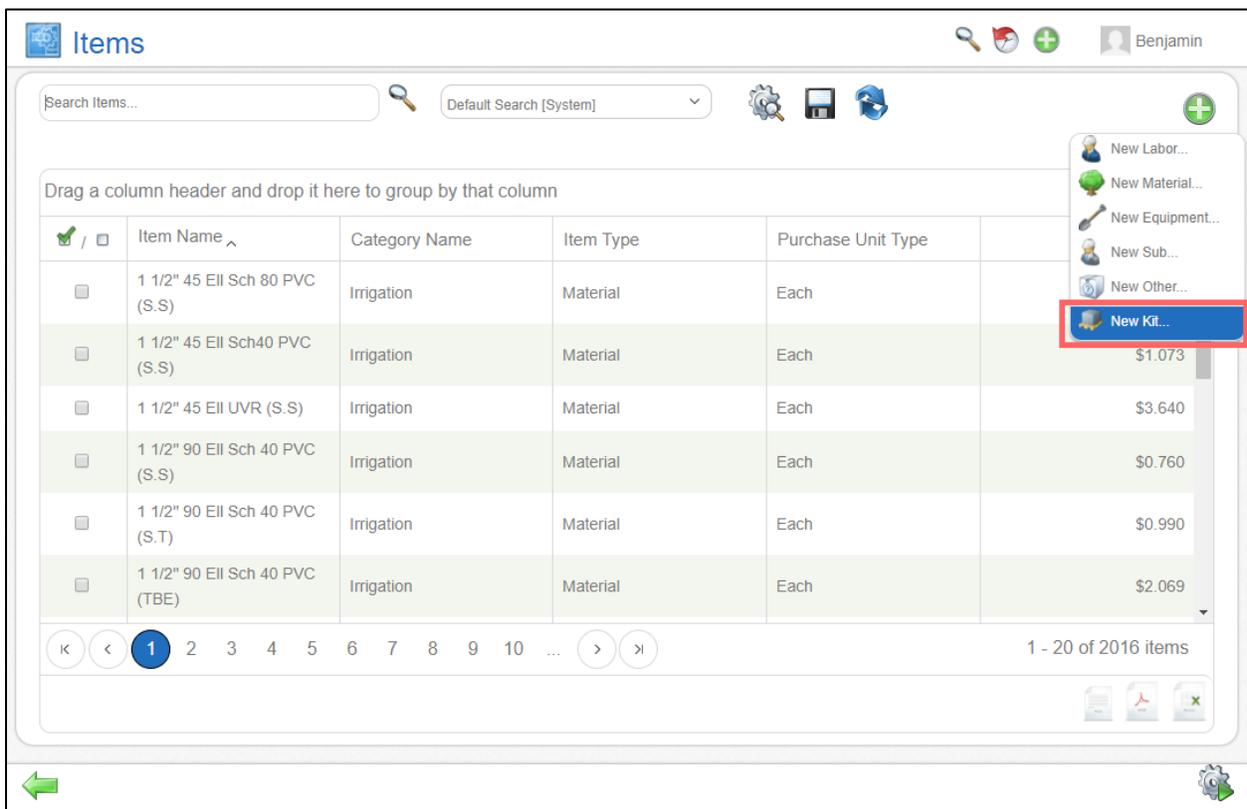
To create a kit to the catalog, follow these steps:



1. Hover over the username and select Administration.



2. Press the blueprint icon.



3. Hover over the green plus and select New Kit.

Kit | ****New****

Item Name **4** Active

Alternate Name Available to Bid **8**

Category **5** Force Single Unit Pricing **9**

Unit Type **6** Takeoff Item **10**

Assigned Branch **7**

Item Name	Type	Factor	Units	Invert	Waste %	Unit Cost	Extended Cost	
Labor - Enhancements	Labor	1.00000000	Hours / Sq Ft	<input type="checkbox"/>	0.00%	\$14.000	\$14.00	<input checked="" type="checkbox"/>
Gravel Crusher Run	Material	1.00000000	Sq Ft / Cubic Yards	<input checked="" type="checkbox"/>	0.00%	\$25.000	\$25.00	<input checked="" type="checkbox"/>
Sand	Material	1.00000000	Sq Ft / Cubic Yards	<input checked="" type="checkbox"/>	0.00%	\$12.000	\$12.00	<input checked="" type="checkbox"/>
Brick Paver	Material	1.00000000	Sq Ft / Each	<input checked="" type="checkbox"/>	0.00%	\$0.900	\$0.90	<input checked="" type="checkbox"/>
							\$51.90	

Add a new Item or Kit... **11**

12 **13** **14** **15**

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 [Single Unit Pricing](#).
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.