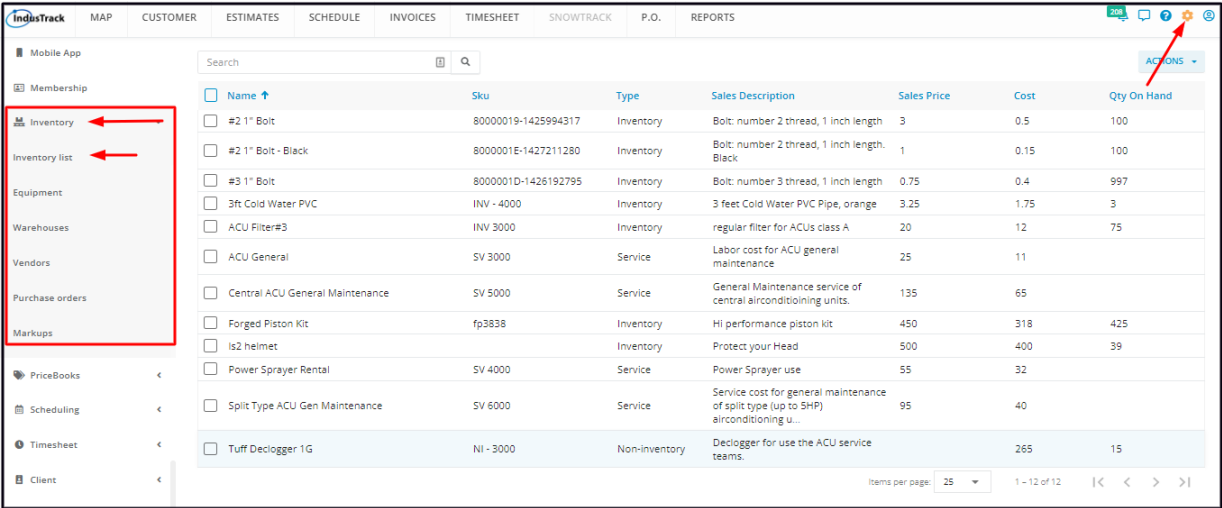


Assemblies

An **assembly** is a bundle of service(s), inventory, and/or non-inventory items packaged together. This could be for services frequently rendered or can also be created for special deals or promotions.

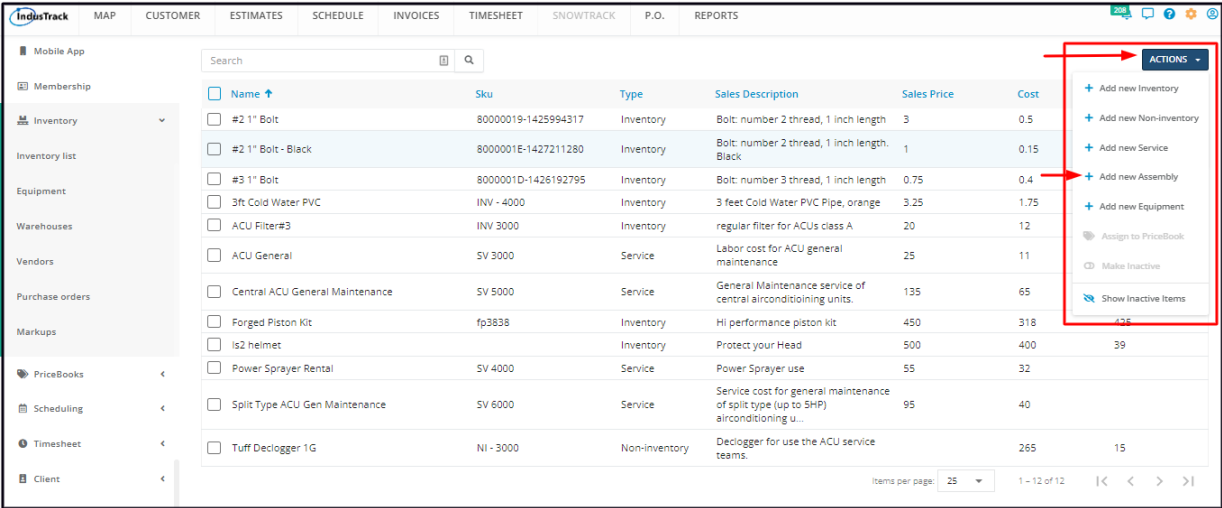
If you have standard services that contain multiple inventories, non-inventory, or service items, create assemblies to make adding them to estimates and invoices easier.

To create and manage Assemblies, go to **Settings > Inventory > Inventory List**.



Set Up a New Assembly

From the Inventory List page, click on the **Actions** button and select **+ Add new Assembly**.



Fill in the item details on the **Add Assembly** window. Fields with (*) are required.

Add Assembly

Name *

SKU

Configurable ☐

Non taxable ☐

Parts

| NAME | QTY |
|-----------------------------------|------------------------|
| Parts search <input type="text"/> | 1 <input type="text"/> |

+ ADD PART

Services

| NAME | QTY |
|--------------------------------------|------------------------|
| Services search <input type="text"/> | 1 <input type="text"/> |

+ ADD SERVICE

Sales price/rate

CANCEL SAVE

Name*

- Key in the name of the assembly/bundle/package.

Add Assembly

Name *

SKU

Configurable ☐

Non taxable ☐

Parts

| NAME | QTY |
|-----------------------------------|------------------------|
| Parts search <input type="text"/> | 1 <input type="text"/> |

+ ADD PART

Services

| NAME | QTY |
|--------------------------------------|------------------------|
| Services search <input type="text"/> | 1 <input type="text"/> |

+ ADD SERVICE

Sales price/rate

CANCEL SAVE

SKU

- Key in the item's assigned assembly code.

Add Assembly

Name *

SKU

Configurable ☐

Non taxable ☐

Parts

| NAME | QTY |
|-----------------------------------|------------------------|
| Parts search <input type="text"/> | 1 <input type="text"/> |

+ ADD PART

Services

| NAME | QTY |
|--------------------------------------|------------------------|
| Services search <input type="text"/> | 1 <input type="text"/> |

+ ADD SERVICE

Sales price/rate

CANCEL SAVE

Configurable

- Tick the checkbox to create an Assembly that does not have a **Sales Price/Rate**. This will allow you to set prices when Estimates or Invoices are created. Leave the checkbox empty to set a standard price for the assembly.

Non taxable

- If the assembly is not taxable, tick the checkbox. But if it is, leave the checkbox empty.

Parts

Add the parts or the items (inventory or non-inventory) to be used in the completion of the Assembly.

- On the Parts Name field, select the item from the drop-down list.

- Set the estimated quantity to be used to complete the assembly. The item has a default quantity of one (1). Update this if needed.

Add Assembly

Name * ACU Split Type Gen Maint Bundle

SKU AS 6000

Configurable ☐

Non taxable ☒

Parts

| NAME | QTY |
|-------------------|-----|
| Tuff Declogger 1G | 1 |

+ ADD PART

Services

| NAME | QTY |
|-----------------|-----|
| Services search | 1 |

+ ADD SERVICE

Sales price/rate

CANCEL SAVE

- Click **+Add Part**. A new item field will be created.

Add Assembly

Name * ACU Split Type Gen Maint Bundle

SKU AS 6000

Configurable ☐

Non taxable ☒

Parts

| NAME | QTY |
|-------------------------------|------|
| NI - 3000 - Tuff Declogger 1G | 4.00 |
| Parts search | 1 |

+ ADD PART

Services

| NAME | QTY |
|-----------------|-----|
| Services search | 1 |

+ ADD SERVICE

CANCEL SAVE

- Continue to add items as may be needed.
- Click the **X** button to remove an item.

Add Assembly

Name * ACU Split Type Gen Maint Bundle

SKU AS 6000

Configurable ☐

Non taxable ☒

Parts

| NAME | QTY |
|-------------------------------|------|
| NI - 3000 - Tuff Declogger 1G | 4.00 |
| INV 3000 - ACU Filter#3 | 6.00 |
| Parts search | 1 |

+ ADD PART

Services

| NAME | QTY |
|-----------------|-----|
| Services search | 1 |

+ ADD SERVICE

CANCEL SAVE

Services

Add the service or services to be performed in the completion of the Assembly.

- On the Services Name field, select the service from the drop-down list of services.

Add Assembly

Parts

| NAME | QTY |
|-------------------------------|------|
| NI - 3000 - Tuff Declogger 1G | 4.00 |
| INV 3000 - ACU Filter#3 | 6.00 |

Parts search: 1 **+ ADD PART**

Services

| NAME | QTY |
|--------------------------------|-----|
| power | 1 |
| SV 4000 - Power Sprayer Rental | |

Sales price/rate:
 Sales description:
 + ADD SERVICE

CANCEL SAVE

- Set the needed number of occurrences of the service to complete the assembly. This also has a default quantity of one (1). Update the quantity, if needed.

Add Assembly

Parts

| NAME | QTY |
|-------------------------------|------|
| NI - 3000 - Tuff Declogger 1G | 4.00 |
| INV 3000 - ACU Filter#3 | 6.00 |

Parts search: 1 **+ ADD PART**

Services

| NAME | QTY |
|----------------------|-----|
| Power Sprayer Rental | 4 |

Sales price/rate:
 Sales description:
 + ADD SERVICE

CANCEL SAVE

- Click **+ Add Service**. A new service field will be created.

Add Assembly

Parts

| NAME | QTY |
|-------------------------------|------|
| NI - 3000 - Tuff Declogger 1G | 4.00 |
| INV 3000 - ACU Filter#3 | 6.00 |

Parts search: 1 **+ ADD PART**

Services

| NAME | QTY |
|--------------------------------|------|
| SV 4000 - Power Sprayer Rental | 6.00 |

Services search: 1 **+ ADD SERVICE**

Sales price/rate:
 Sales description:
 + ADD SERVICE

CANCEL SAVE

- Continue to add all services to be performed as may be needed.
- Click the **X** button to remove an item.

Add Assembly

| NAME | QTY |
|-------------------------------|------|
| NI - 3000 - Tuff Declogger 1G | 4.00 |
| INV 3000 - ACU Filter#3 | 6.00 |

Parts search: 1 **+ ADD PART**

| NAME | QTY |
|--|------|
| SV 4000 - Power Sprayer Rental | 6.00 |
| SV 6000 - Split Type ACU Gen Maintenance | 6.00 |

Services search: 1 **+ ADD SERVICE**

Sales price/rate:
 Sales description:

CANCEL SAVE

Sales Price/Rate

Key in the standard selling price of a single unit of the Assembly. This is the price quoted to customers.

Add Assembly

| NAME | QTY |
|-------------------------------|------|
| NI - 3000 - Tuff Declogger 1G | 4.00 |
| INV 3000 - ACU Filter#3 | 6.00 |

Parts search: 1 **+ ADD PART**

| NAME | QTY |
|--|------|
| SV 4000 - Power Sprayer Rental | 6.00 |
| SV 6000 - Split Type ACU Gen Maintenance | 6.00 |

Services search: 1 **+ ADD SERVICE**

Sales price/rate: 400.00
 Sales description:

CANCEL SAVE

- If the Assembly is set to be Configurable, the Sales Price/Rate field will be removed.

Add Assembly

SKU: AS 6000

Configurable ☒
 Non taxable: ☐

| NAME | QTY |
|-------------------------------|------|
| NI - 3000 - Tuff Declogger 1G | 4.00 |
| INV 3000 - ACU Filter#3 | 6.00 |

Parts search: 1 **+ ADD PART**

| NAME | QTY |
|--|------|
| SV 4000 - Power Sprayer Rental | 6.00 |
| SV 6000 - Split Type ACU Gen Maintenance | 6.00 |

Services search: 1 **+ ADD SERVICE**

Sales description:

CANCEL SAVE

Sales Description

Key in a brief description of the Assembly.

Add Assembly

NI - 3000 - Tuff Declogger 1G 4.00

INV 3000 - ACU Filter#3 6.00

Parts search 1 **+ ADD PART**

Services

| NAME | QTY |
|--|------|
| SV 4000 - Power Sprayer Rental | 6.00 |
| SV 6000 - Split Type ACU Gen Maintenance | 6.00 |

Services search 1 **+ ADD SERVICE**

Sales price/rate 400.00

Sales description Split Type ACU quarterly general maintenance Max of 6 units package

CANCEL SAVE

Save the new Assembly. The assembly will be added to the Inventory List.

| Name | Sku | Type | Sales Description | Sales Price | Cost | Qty On Hand |
|--|---------------------|-----------------|---|-------------|------|-------------|
| #2 1" Bolt | 80000019-1425994317 | Inventory | Bolt: number 2 thread, 1 inch length | 3 | 0.5 | 100 |
| #2 1" Bolt - Black | 8000001E-1427211280 | Inventory | Bolt: number 2 thread, 1 inch length. Black | 1 | 0.15 | 100 |
| #3 1" Bolt | 8000001D-1426192795 | Inventory | Bolt: number 3 thread, 1 inch length | 0.75 | 0.4 | 997 |
| 3ft Cold Water PVC | INV - 4000 | Inventory | 3 feet Cold Water PVC Pipe, orange | 3.25 | 1.75 | 3 |
| ACU Filter#3 | INV 3000 | Inventory | regular filter for ACUs class A | 20 | 12 | 75 |
| ACU General | SV 3000 | Service | Labor cost for ACU general maintenance | 25 | 11 | |
| ACU Split Type Gen Maint Bundle | AS 6000 | Assembly | Split Type ACU quarterly general maintenance Max of 6 units package | 400 | | |
| Central ACU General Maintenance | SV 5000 | Service | General Maintenance service of central airconditioning units. | 135 | 65 | |
| Forged Piston Kit | fp3838 | Inventory | Hi performance piston kit | 450 | 318 | 425 |
| Is2 helmet | | Inventory | Protect your Head | 500 | 400 | 39 |
| Power Sprayer Rental | SV 4000 | Service | Power Sprayer use | 55 | 32 | |
| Split Type ACU Gen Maintenance | SV 6000 | Service | Service cost for general maintenance of split type (up to SHP) airconditioning u... | 95 | 40 | |
| Tuff Declogger 1G | NI - 3000 | Non-inventory | Declogger for use the ACU service teams. | | 265 | 15 |

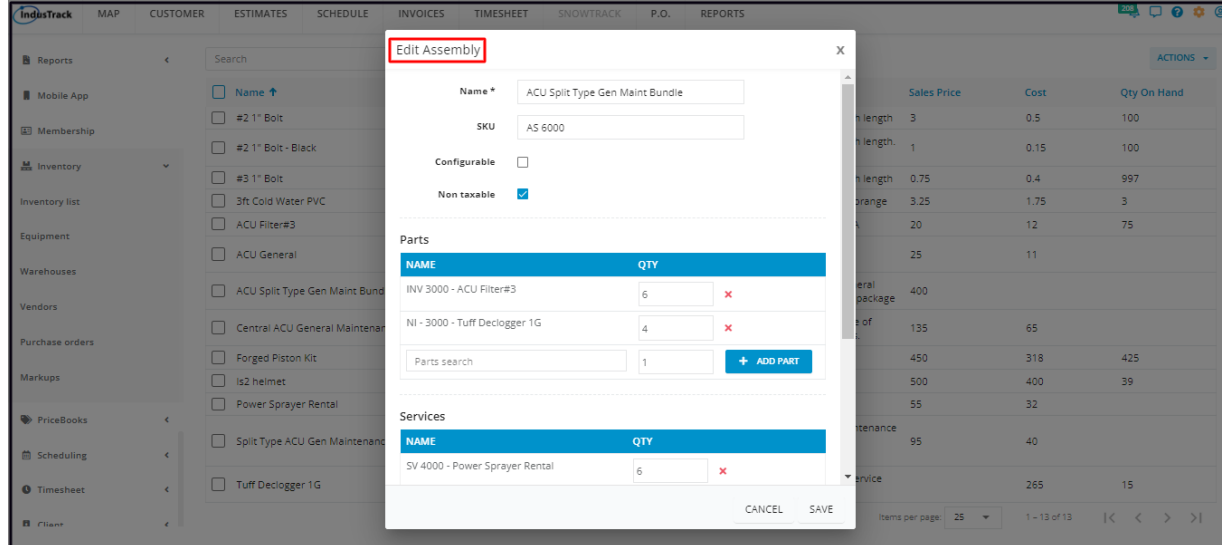
Update the Details of an Assembly

Find the Assembly item to be updated from the list. Click anywhere on the row and the profile will open in edit mode.

| Name | Sku | Type | Sales Description | Sales Price | Cost | Qty On Hand |
|--|---------------------|-----------------|---|-------------|------|-------------|
| #2 1" Bolt | 80000019-1425994317 | Inventory | Bolt: number 2 thread, 1 inch length | 3 | 0.5 | 100 |
| #2 1" Bolt - Black | 8000001E-1427211280 | Inventory | Bolt: number 2 thread, 1 inch length. Black | 1 | 0.15 | 100 |
| #3 1" Bolt | 8000001D-1426192795 | Inventory | Bolt: number 3 thread, 1 inch length | 0.75 | 0.4 | 997 |
| 3ft Cold Water PVC | INV - 4000 | Inventory | 3 feet Cold Water PVC Pipe, orange | 3.25 | 1.75 | 3 |
| ACU Filter#3 | INV 3000 | Inventory | regular filter for ACUs class A | 20 | 12 | 75 |
| ACU General | SV 3000 | Service | Labor cost for ACU general maintenance | 25 | 11 | |
| ACU Split Type Gen Maint Bundle | AS 6000 | Assembly | Split Type ACU quarterly general maintenance Max of 6 units package | 400 | | |
| Central ACU General Maintenance | SV 5000 | Service | General Maintenance service of central airconditioning units. | 135 | 65 | |
| Forged Piston Kit | fp3838 | Inventory | Hi performance piston kit | 450 | 318 | 425 |
| Is2 helmet | | Inventory | Protect your Head | 500 | 400 | 39 |
| Power Sprayer Rental | SV 4000 | Service | Power Sprayer use | 55 | 32 | |
| Split Type ACU Gen Maintenance | SV 6000 | Service | Service cost for general maintenance of split type (up to SHP) airconditioning u... | 95 | 40 | |
| Tuff Declogger 1G | NI - 3000 | Non-inventory | Declogger for use the ACU service teams. | | 265 | 15 |

Edit/Update as may be needed. Once done, **Save** the changes.

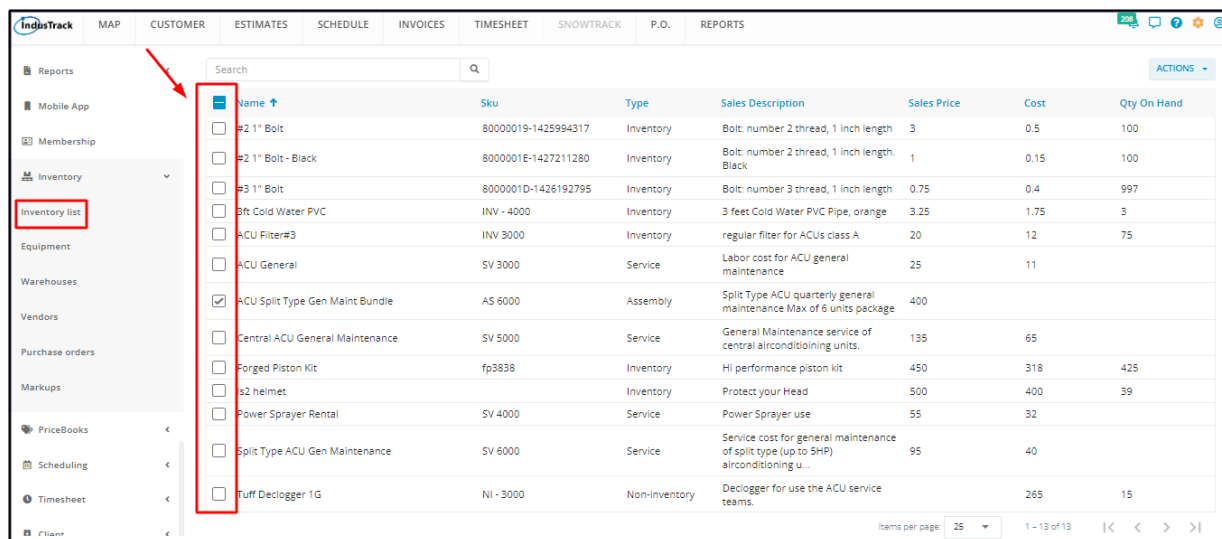
- An inactive Assembly item is not editable. This will have to be reactivated first.



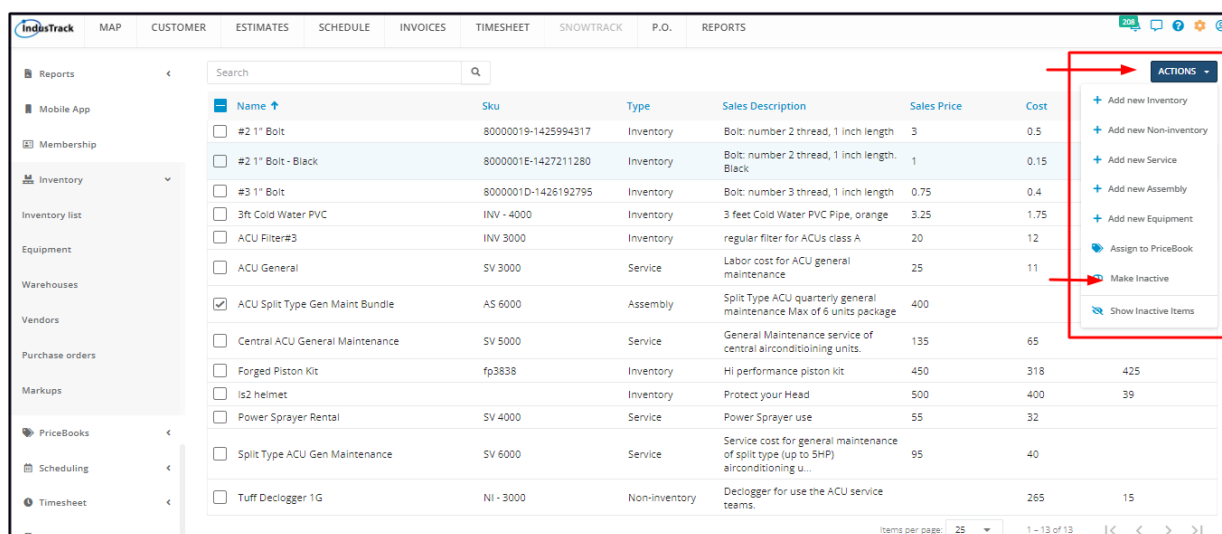
Deactivate an Assembly

Deactivate an assembly if this will no longer be offered. This is an option to take instead of deleting the assembly which could cause errors.

Find the assembly item to be deactivated from the Inventory List and tick the checkbox to its left.

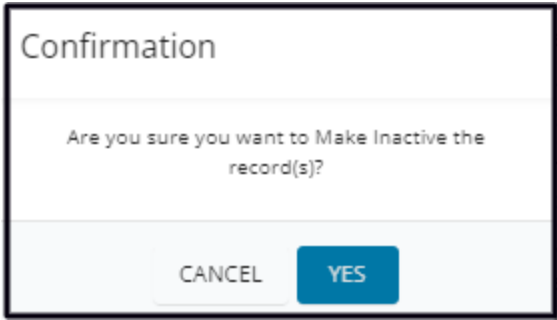


Click the **Actions** button and select **Make Inactive**.

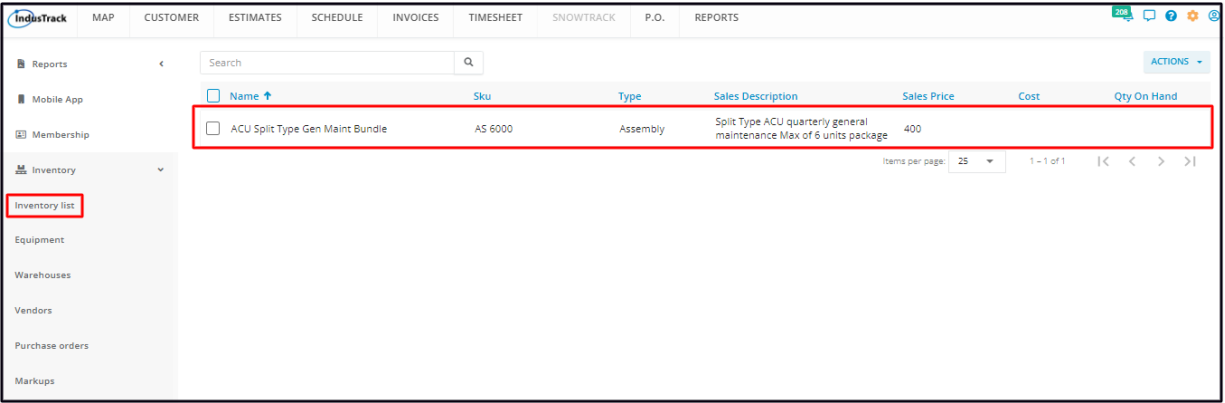
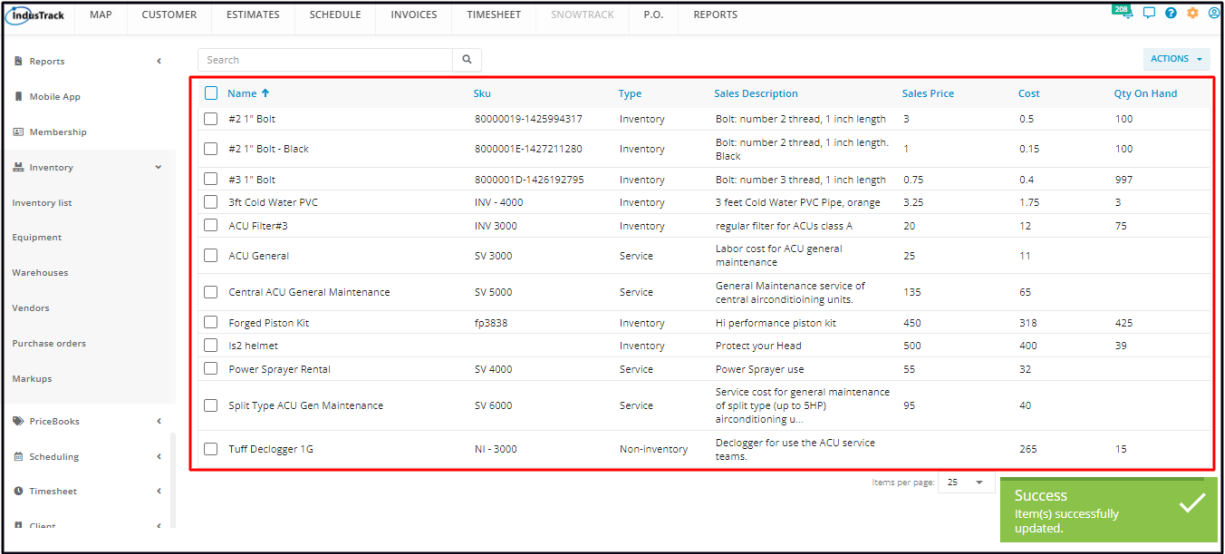


- To deactivate multiple assemblies, tick the checkboxes to the left of all. If all items on the list will be deactivated, just tick the checkbox of the Name header. Just note that the list includes the other types of inventory. And then go to the **Actions** button and select **Make Inactive**.

A warning window will come up. Click the **Yes** button to continue with the deactivation and **Cancel** to abandon the action.



The assembly item will be removed from the **Active List** and moved to the **Inactive List**.



Reactivate a Deactivated Assembly

Go to the **Inactive Inventory List**.

| Name | SKU | Type | Sales Description | Sales Price | Cost |
|--|---------------------|---------------|---|-------------|------|
| <input type="checkbox"/> #2 1" Bolt | 80000019-1425994317 | Inventory | Bolt: number 2 thread, 1 inch length | 3 | 0.5 |
| <input type="checkbox"/> #2 1" Bolt - Black | 8000001E-1427211280 | Inventory | Bolt: number 2 thread, 1 inch length. Black | 1 | 0.15 |
| <input type="checkbox"/> #3 1" Bolt | 8000001D-1426192795 | Inventory | Bolt: number 3 thread, 1 inch length | 0.75 | 0.4 |
| <input type="checkbox"/> 3ft Cold Water PVC | INV - 4000 | Inventory | 3 feet Cold Water PVC Pipe, orange | 3.25 | 1.75 |
| <input type="checkbox"/> ACU Filter#3 | INV 3000 | Inventory | regular filter for ACUs class A | 20 | 12 |
| <input type="checkbox"/> ACU General | SV 3000 | Service | Labor cost for ACU general maintenance | 25 | 11 |
| <input type="checkbox"/> Central ACU General Maintenance | SV 5000 | Service | General Maintenance service of central airconditioning units. | 135 | 65 |
| <input type="checkbox"/> Forged Piston Kit | fp3838 | Inventory | Hi performance piston kit | 450 | 318 |
| <input type="checkbox"/> Is2 helmet | | Inventory | Protect your Head | 500 | 400 |
| <input type="checkbox"/> Power Sprayer Rental | SV 4000 | Service | Power Sprayer use | 55 | 32 |
| <input type="checkbox"/> Split Type ACU Gen Maintenance | SV 6000 | Service | Service cost for general maintenance of split type (up to 5HP) airconditioning u... | 95 | 40 |
| <input type="checkbox"/> Tuff Declogger 1G | NI - 3000 | Non-inventory | Declogger for use the ACU service teams. | 265 | 15 |

Find the assembly item to be reactivated from the list and tick the checkbox to its left.

| Name | SKU | Type | Sales Description | Sales Price | Cost | Qty On Hand |
|---|---------|----------|---|-------------|------|-------------|
| <input checked="" type="checkbox"/> ACU Split Type Gen Maint Bundle | AS 6000 | Assembly | Split Type ACU quarterly general maintenance Max of 6 units package | 400 | | |

Click the **Actions** button and select **Make Active**.

| Name | SKU | Type | Sales Description | Sales Price | Cost |
|---|---------|----------|---|-------------|------|
| <input checked="" type="checkbox"/> ACU Split Type Gen Maint Bundle | AS 6000 | Assembly | Split Type ACU quarterly general maintenance Max of 6 units package | 400 | |

- To reactivate multiple assemblies, tick the checkboxes to the left of all. If all items on the list will be reactivated, just tick the checkbox of the Name header. Just note that the list includes the other types of inventory.
- Go to the **Actions** button and select **Make Active**.

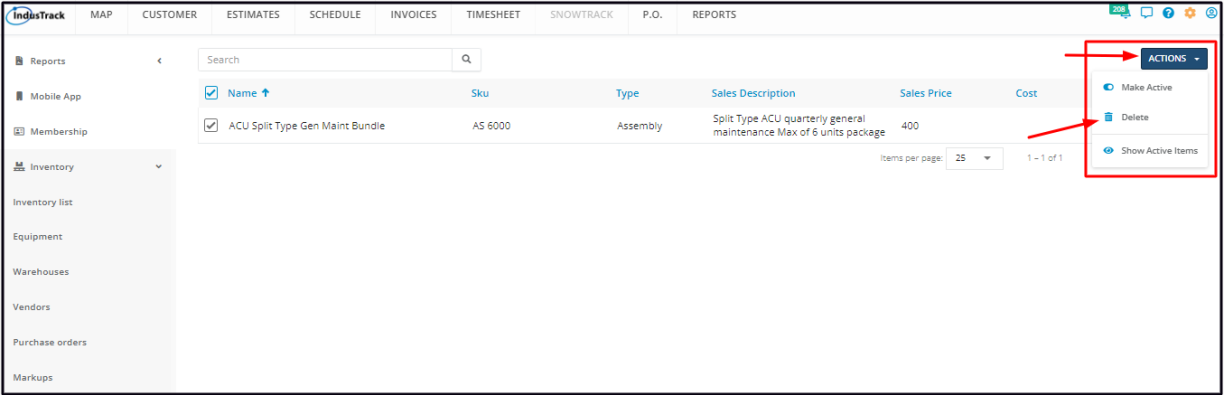
A warning window will come up. Click the **Yes** button to continue with the reactivation and **Cancel** to abandon the action.

Confirmation

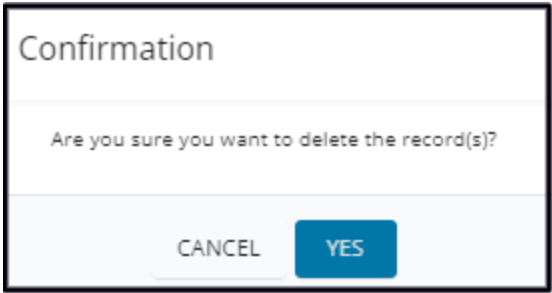
Are you sure you want to Make Active the record(s)?

CANCEL
YES

The item will be removed from the **Inactive List** and moved to the **Active List**. Update the assembly profile as may be needed.



A warning window will come up. Click the **Yes** button to continue with the deletion and **Cancel** to abandon the action.



The assembly item will be removed from the Inactive Inventory list.

