

ESTICOM

Materials Management Guide

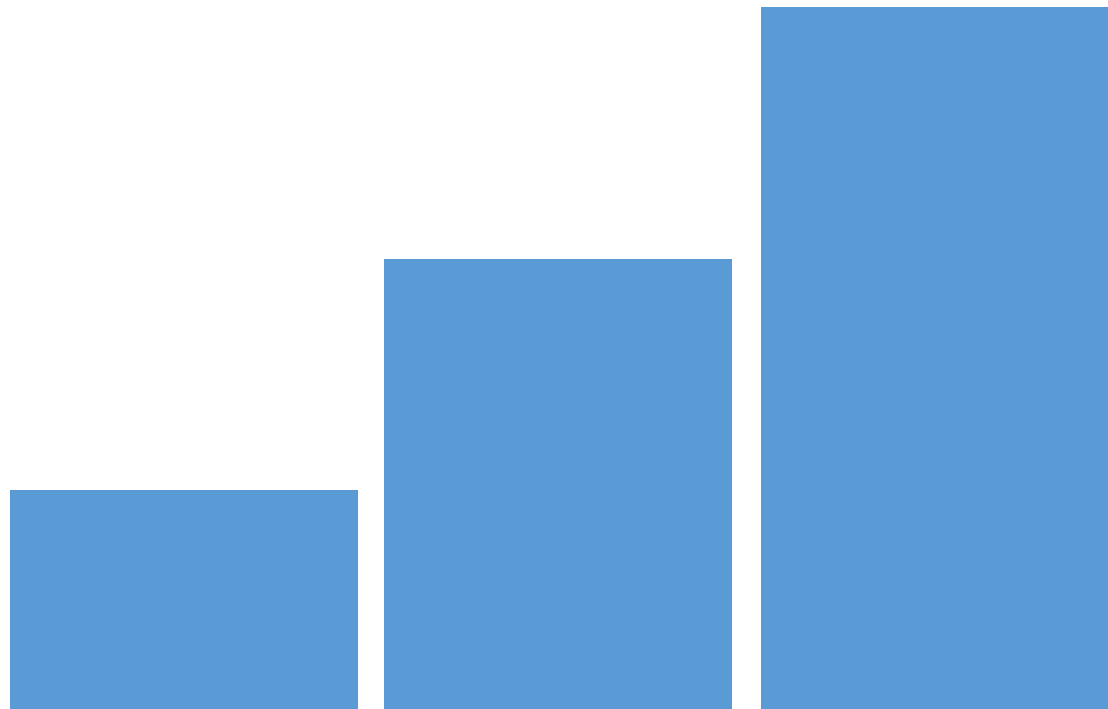


Table of Contents

Overview.....	2
Material Catalog Module.....	2
Adding Parts.....	2
Create Assemblies	5
Editing Parts/Assemblies	10
Duplicating Parts/Assemblies	12
Use Parts in Assemblies	15
Deleting Parts/Assemblies	18
Manage Catalogs Link	20
Material Catalogs (Account Menu)	20
Group.....	20
Create New Group	21
View Group	26
Enable/Disable Group (Toggle Group)	27
Duplicate Group.....	28
Export Parts	30
Delete Groups.....	31
Import Materials.....	32
Downloading Templates	32
Importing New Materials from Excel File.....	34
Importing Parts from Trade Service	37
Adding Materials.....	40
Adding Parts Using the Material Catalogs (Account Menu)	40
Create Assemblies Using the Material Catalogs (Account Menu)	44
Edit Materials.....	50
Duplicate Materials.....	52
Use Materials in Assembly	55
Delete Materials	58

Overview

This guide is designed to help users understand Esticom's Material Management feature. In this document, you will learn the following:

- Manage Materials
- Basic Catalog Operations
- Material Catalog (Module Menu) versus Material Catalogs (Account Menu)

Material Catalog Module

The Material Catalog module displays all groups/categories as filters on the left panel and existing materials on the right pane. This module allows you to access and manage all materials by parts or assemblies with ease.

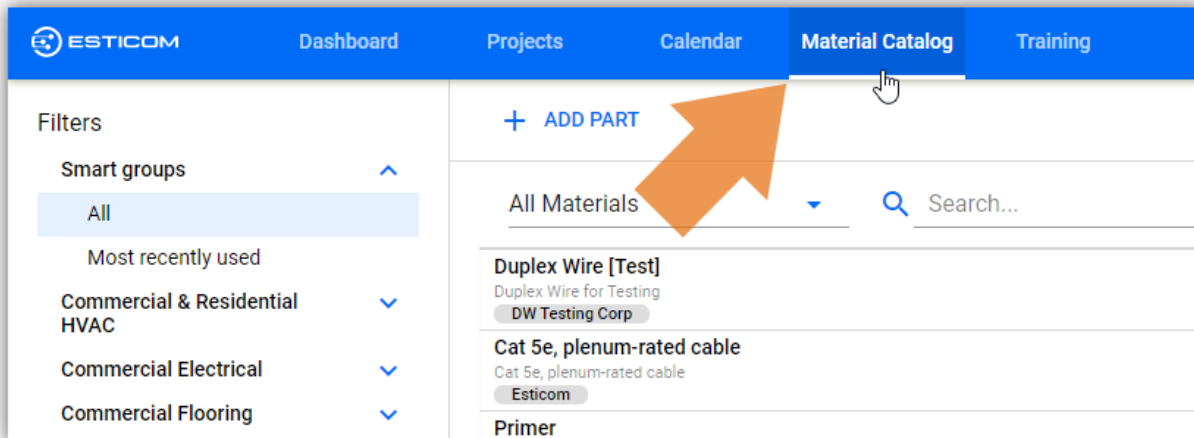
The Material Catalog module lets you do the following operations:

- [Add Parts](#)
- [Create Assemblies](#)
- [Edit Parts/Assemblies Details](#)
- [Duplicate Parts/Assemblies](#)
- [Delete Parts/Assemblies](#)
- [Access the Manage Catalogs Link](#)

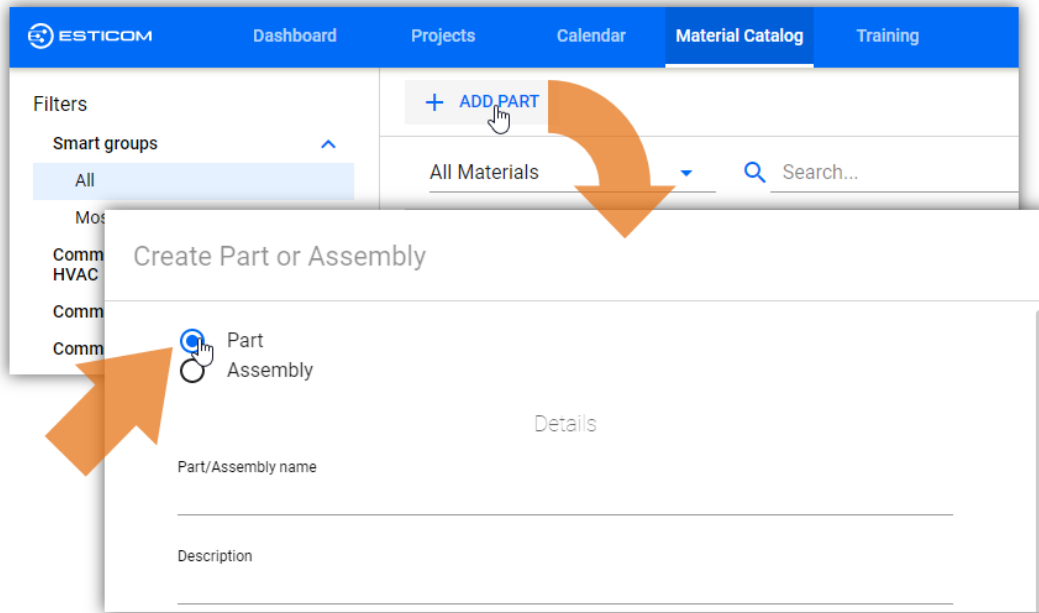
Adding Parts

In this section, you will learn how to add parts to your current material catalog. Adding parts lets you specify the part details and cost configuration.

1. On the **Module Menu**, click **Material Catalog**.



2. Click the **+ ADD PART** button.
 - a. The **Create Part or Assembly** window opens.



3. By default, the **Part** radio button is selected. Ensure that this option is selected.
4. Specify the part details:

The screenshot shows the 'Create Part or Assembly' window with the 'Part' radio button selected. The 'Details' section is highlighted with an orange border. The details include:

Part/Assembly name	Cat 5e	
Description	Cat 5e	
Manufacturer	Esticom Test	
Catalog Number	CN01	
Phase Name	PN01	Phase Code
Cost Name	CN01	Cost Code
Unit of Measure	ft	Labor rate (mins)
Material cost	2	2
Catalog to include this material in	Custom	

At the bottom right of the window, there are 'CANCEL' and 'SAVE' buttons.

Field	Instructions
Part/Assembly Name	Enter the part or material name.
Description	Enter the part or material description.
Manufacturer	Enter the Manufacturer Name if necessary.
Catalog Number	Enter the part's catalog number.
Phase Code	Enter the part's phase code.
Cost Code	Enter the part's cost code.
Unit of Measure	Click the drop-down arrow to select the part's appropriate unit of measurement.
Material Cost	Enter the part/material cost.
Labor rate (mins)	Enter the part/material installation labor rate in minutes or toggle it into hours by clicking the Toggle icon.
Catalog to include this material in	Click the drop-down arrow to select a catalog where you want this material to be included. Note: add this material to a new catalog by clicking the New Catalog link.

5. Review the specified details and click **SAVE** to add the part.

Cost Name: CN01

Cost Code: CC01

Unit of Measure: ft

Material cost: 2

Labor rate (mins): 2

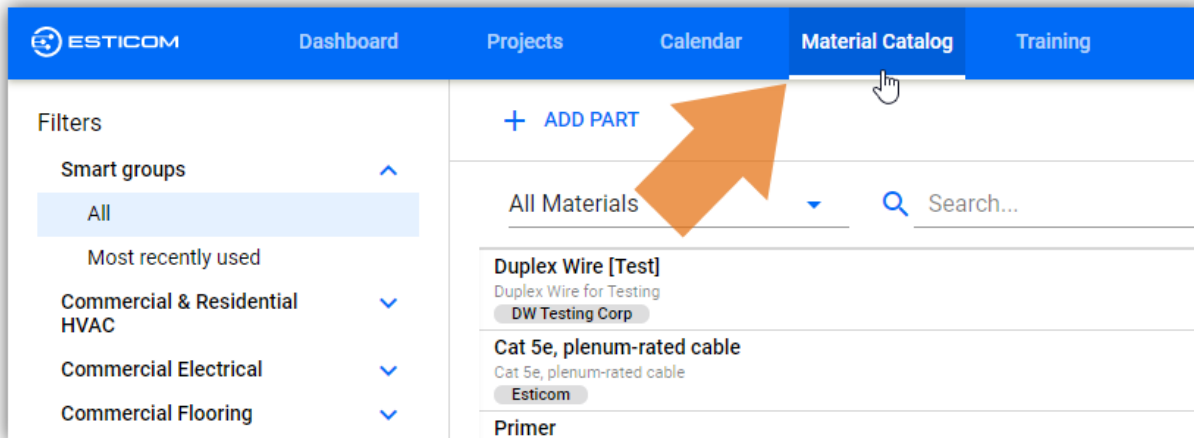
Catalog to include this material in: Custom

CANCEL SAVE

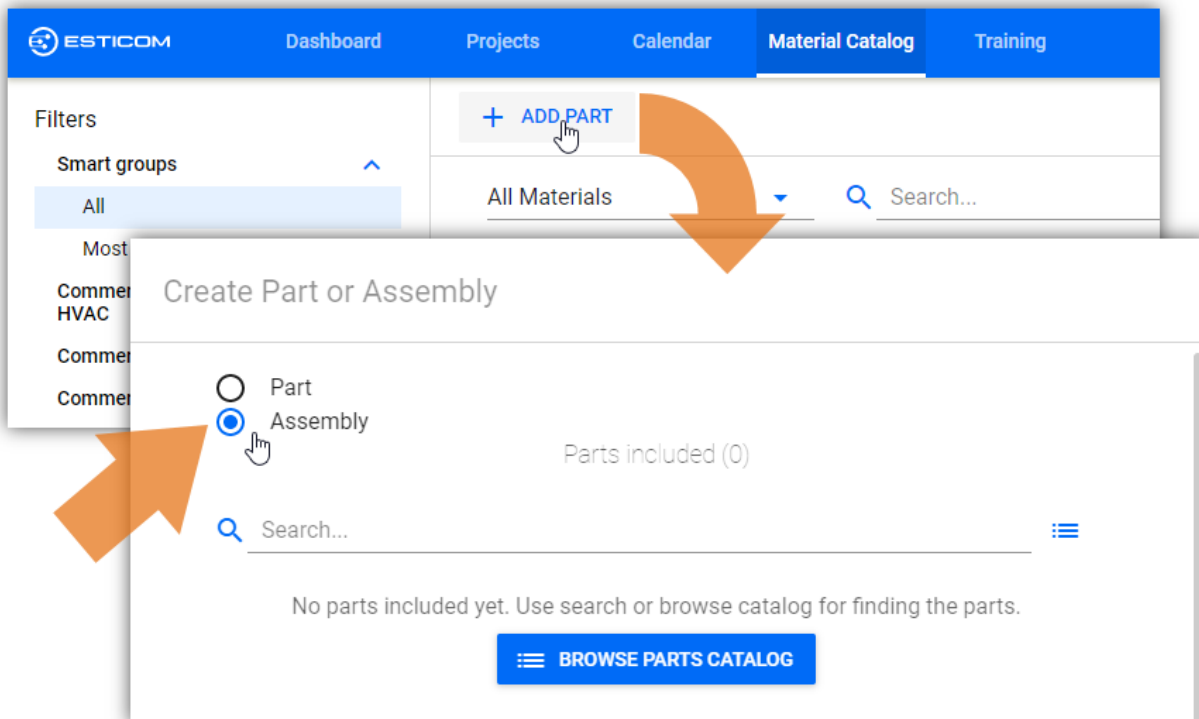
Create Assemblies

In this section, you will learn how to create assemblies using existing materials from the catalog. Creating an assembly lets you choose parts to assemble, specify the number of parts and assembly details, and configure the assembly cost configuration.

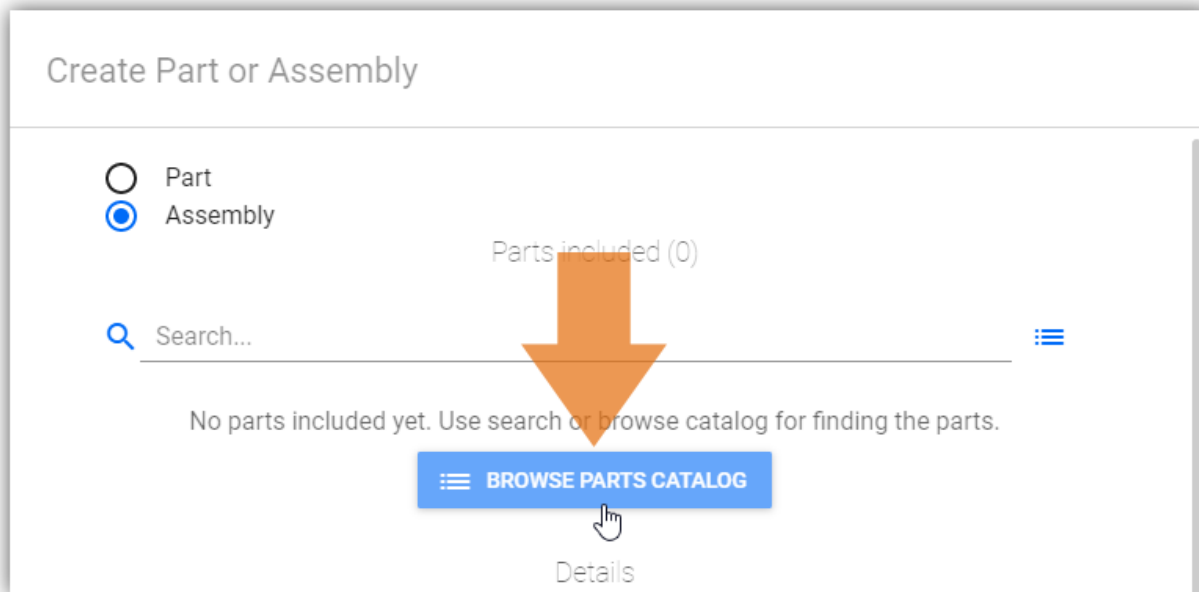
1. On the **Module Menu**, click **Material Catalog**.



2. Click the **+ ADD PART** button.
3. Select the **Assembly** radio button.

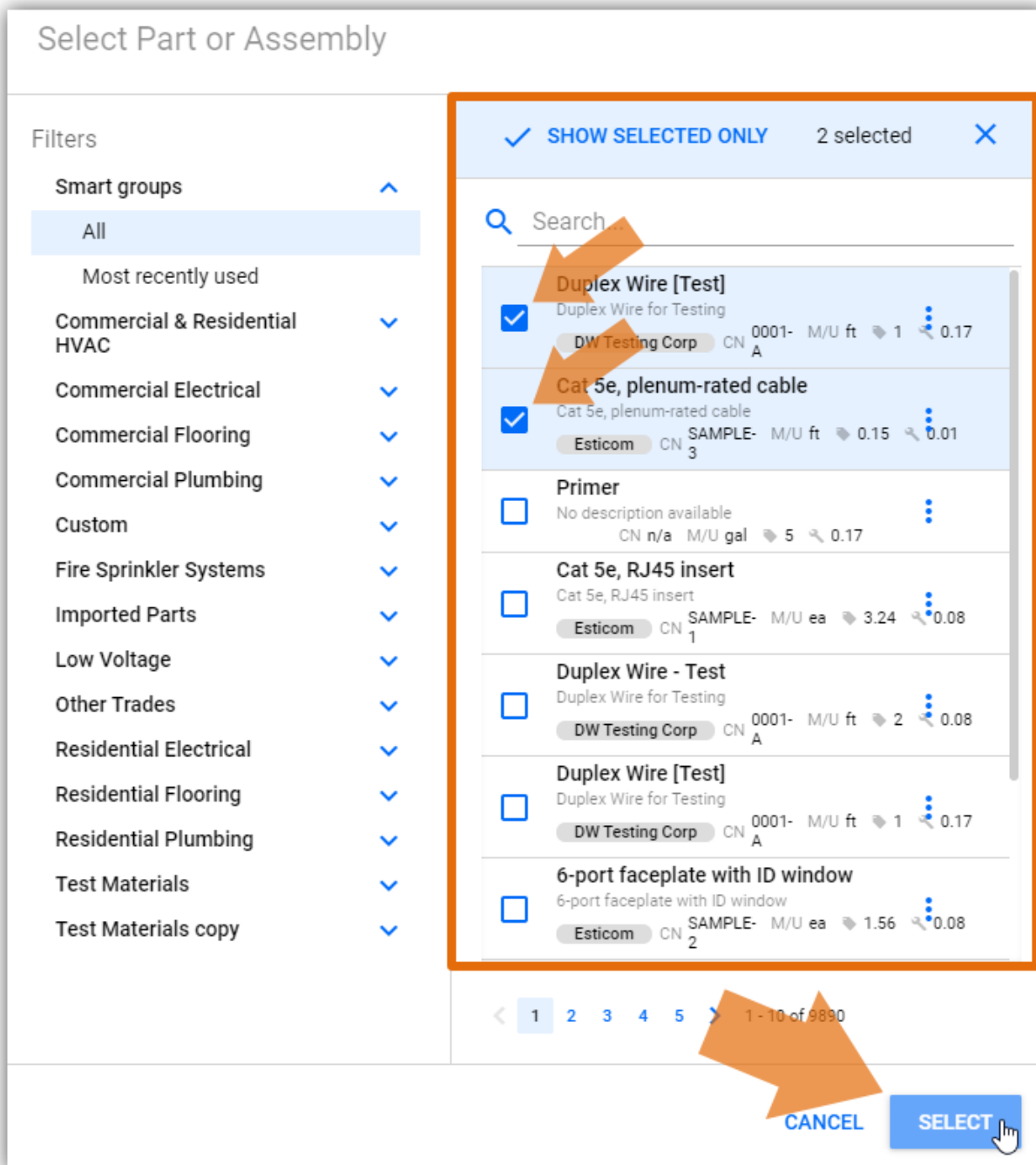


4. Start assembling the parts by searching and selecting the individual part names. Use the **Search...** bar or click the **BROWSE PARTS CATALOG** button. In this example, we clicked the **BROWSE PARTS CATALOG** button.



5. To maximize your search, use the **Filters** panel by selecting the appropriate **Trade** and **Parts Category**.

6. In the **Parts List** panel on the right, click the **Plus (+)** icon to start adding the parts.
- a. **Note:** to remove selected parts, click the **X** icon.



7. After selecting the parts, click **SELECT**.

- Specify the number of materials by clicking the field beside the **Part** name and enter the appropriate value.

Create Part or Assembly

☐ Part
 ☒ Assembly

Parts included (2)

1	Cat 5e, plenum-rated cable Cat 5e, plenum-rated cable Esticom	CN SAMPLE-3	M/U ft	0.15	0.01	X
1	Duplex Wire [Test] Duplex Wire for Testing DW Testing Corp	CN 0001-A	M/U ft	1	0.17	X

Details

- Specify the **Assembly Details**:

Create Part or Assembly

☐ Part
 ☒ Assembly

Parts included (2)

1	Cat 5e, plenum-rated cable Cat 5e, plenum-rated cable Esticom	CN SAMPLE-3	M/U ft	0.15	0.01	X
1	Duplex Wire [Test] Duplex Wire for Testing DW Testing Corp	CN 0001-A	M/U ft	1	0.17	X

Details

Part/Assembly name

Test Cat 5e, plenum-rated cable

Description

Test Cat 5e,

Manufacturer

Catalog Number

TC02

Phase Name

PC02

Phase Code

PC02

Cost Name

CN01

Cost Code

CC02

Unit of Measure

ft

Material cost

1.15

Calculated from parts

Labor rate (mins)

10.45

Calculated from parts

Catalog to include this material in

Custom

CANCEL

SAVE

Field	Instructions
Part/Assembly Name	Enter the assembly name.
Description	Enter the assembly description.
Manufacturer	Enter the Manufacturer Name if necessary.
Catalog Number	Enter the assembly's catalog number.
Phase Code	Enter the assembly's phase code.
Cost Code	Enter the assembly's cost code.
Unit of Measure	Click the drop-down arrow to select the assembly's appropriate unit of measurement.
Material Cost	By default, this field displays a calculated value from selected parts.
Labor rate (mins)	By default, this field displays a calculated value from selected parts.
Catalog to include this material in	Click the drop-down arrow to select a catalog where you want this assembly/material to be included in. Note: add this material to a new catalog by clicking the New Catalog link.

10. Review the specified details and click **SAVE** to create the assembly.

The screenshot shows a form with the following fields and values:

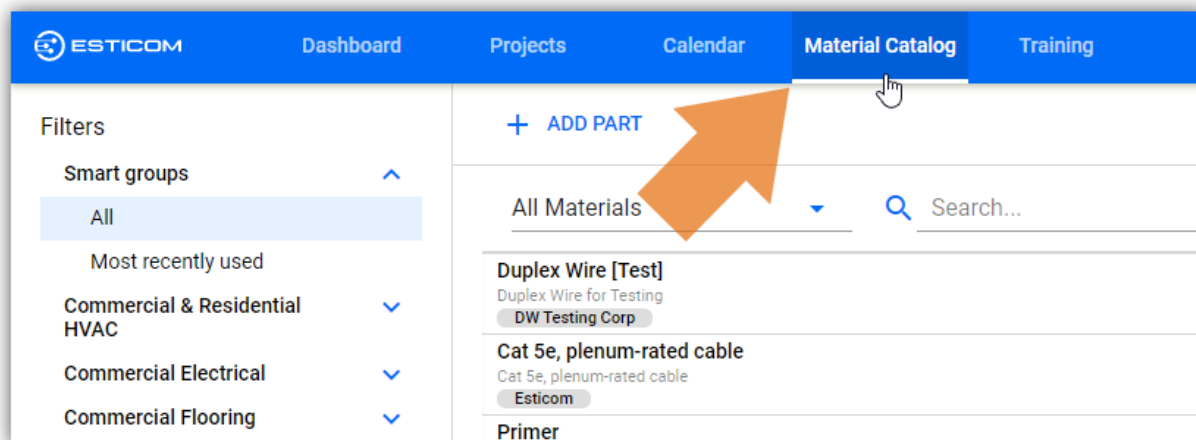
- Unit of Measure:** ft (dropdown menu)
- Material cost:** 1.15 (with a blue double-headed arrow icon to its right and the text "Calculated from parts" below it)
- Labor rate (mins):** 10.45 (with the text "Calculated from parts" below it)
- Catalog to include this material in:** Custom (dropdown menu)

At the bottom right, there are two buttons: "CANCEL" and "SAVE". A large orange arrow points down towards the "SAVE" button, which has a hand cursor icon over it.

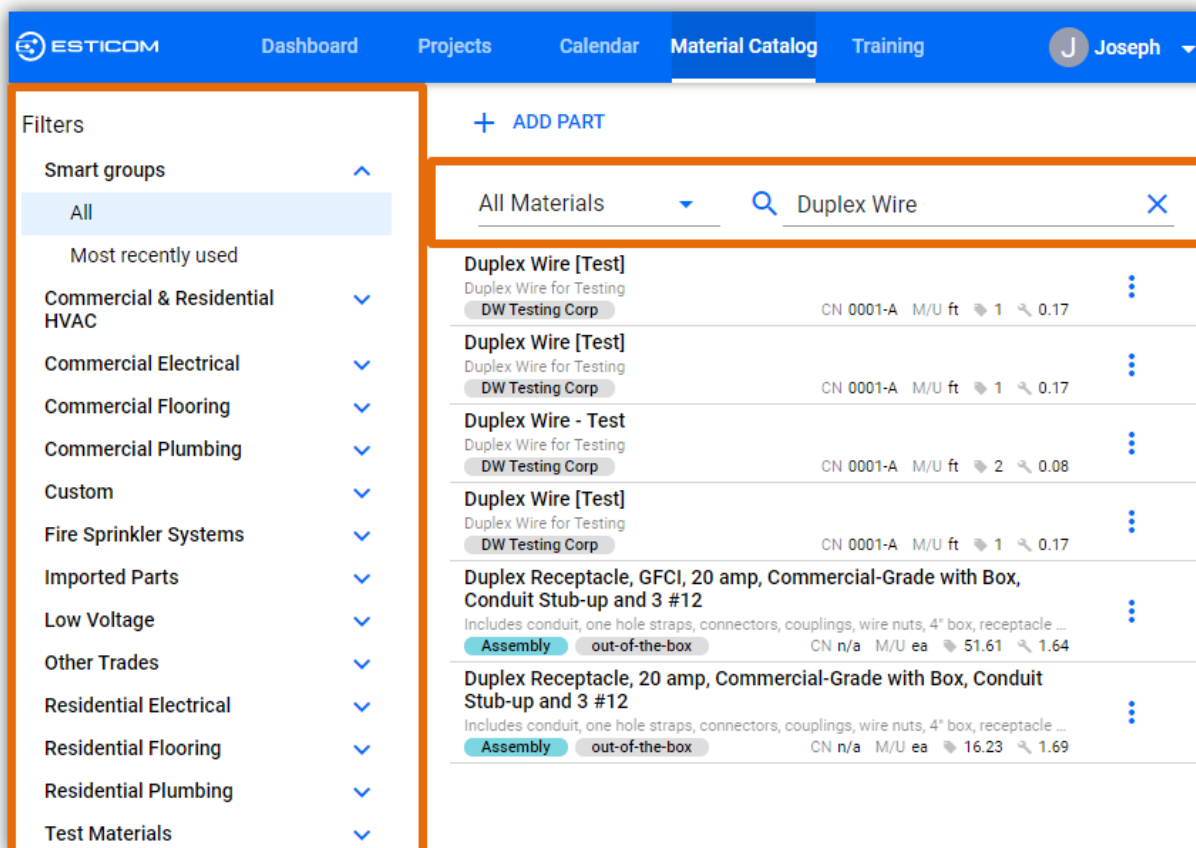
Editing Parts/Assemblies

In this section, you will learn how to edit/update materials. It is worth noting that out-of-the-box materials can't be updated/edited. If you edit out-of-the-box materials, it will be saved as separate and new material. On the other hand, you can update custom materials without restrictions.

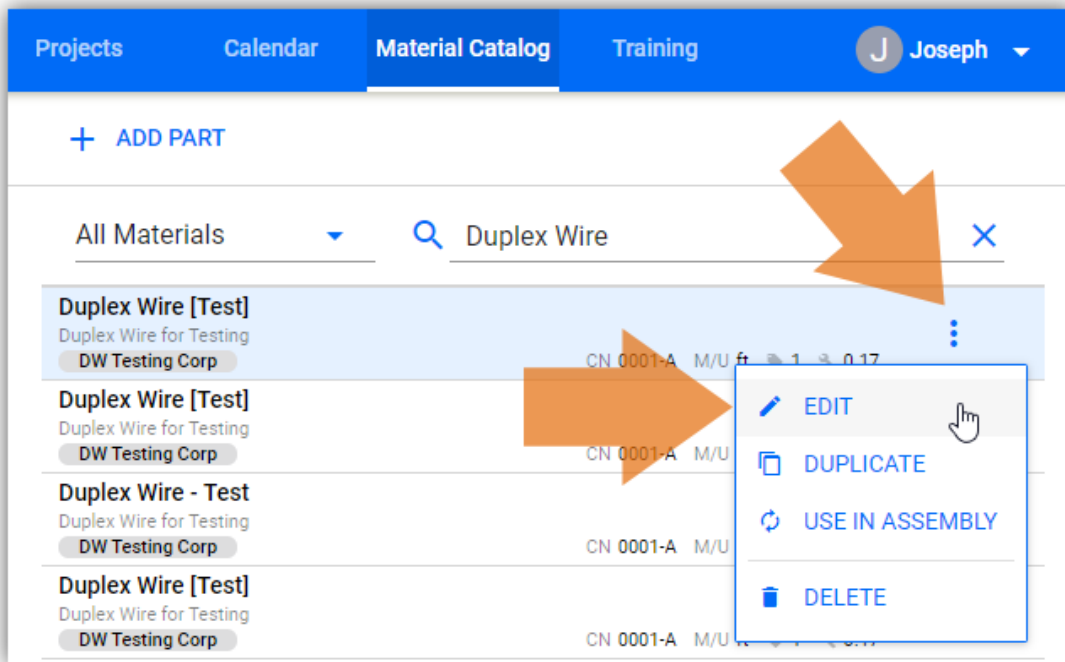
1. On the **Module Menu**, click **Material Catalog**.



2. Use the **Search Bar** to find the part/assembly that you want to update or use the **Filters** panel in the left pane.



- Click the part/assembly's **More Options** button and select **Edit**.





- Update the necessary information.

The screenshot shows the 'Edit Part or Assembly' dialog box. The 'Part' radio button is selected. The 'Details' section is highlighted with an orange border. The 'Details' section contains fields for Part/Assembly name, Description, Manufacture, Catalog Name, Phase Name, Phase Code, Cost Name, Cost Code, Unit of Measure, Material cost, Labor rate (mins), and Catalog to include this material in. The 'SAVE' button is highlighted in blue.

- Review the changes and click **SAVE** to save the updated information.

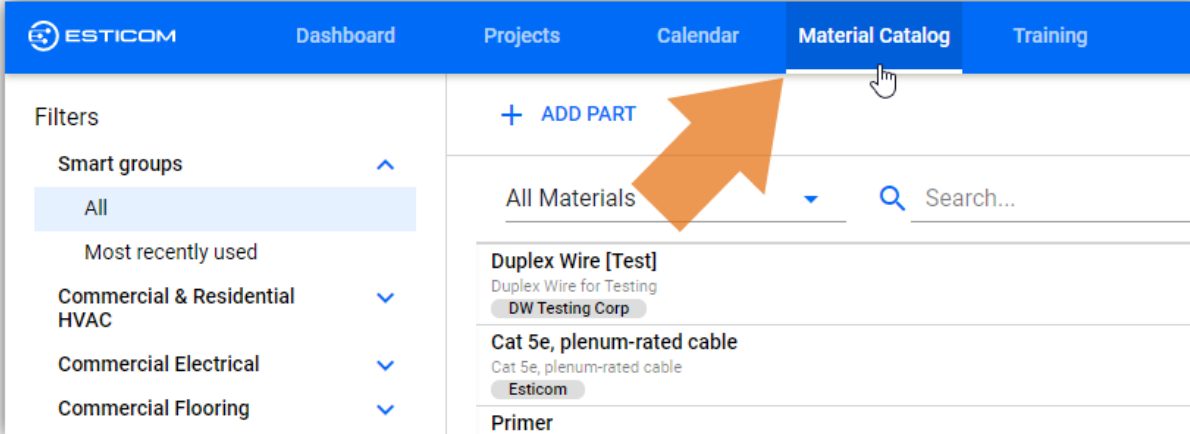
Cost Name		Cost Code	
		CC001	
Unit of Measure	Material cost	Labor rate (mins)	
ft	1	10	
Catalog to include this material in			
Custom			
		CANCEL	SAVE

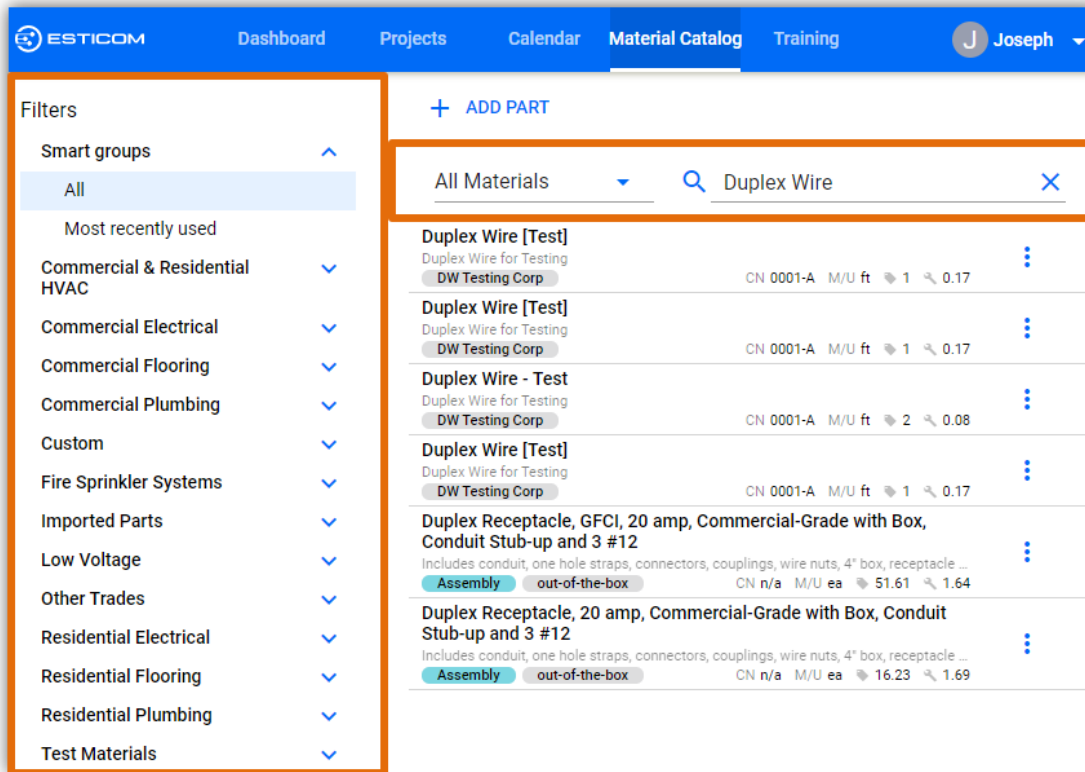
Duplicating Parts/Assemblies

In this section, you will learn how to duplicate parts/assemblies. The duplicate option enables you to create copies of existing materials within the Material Catalog module. Duplicated materials will have indicators of being duplicates/copies.

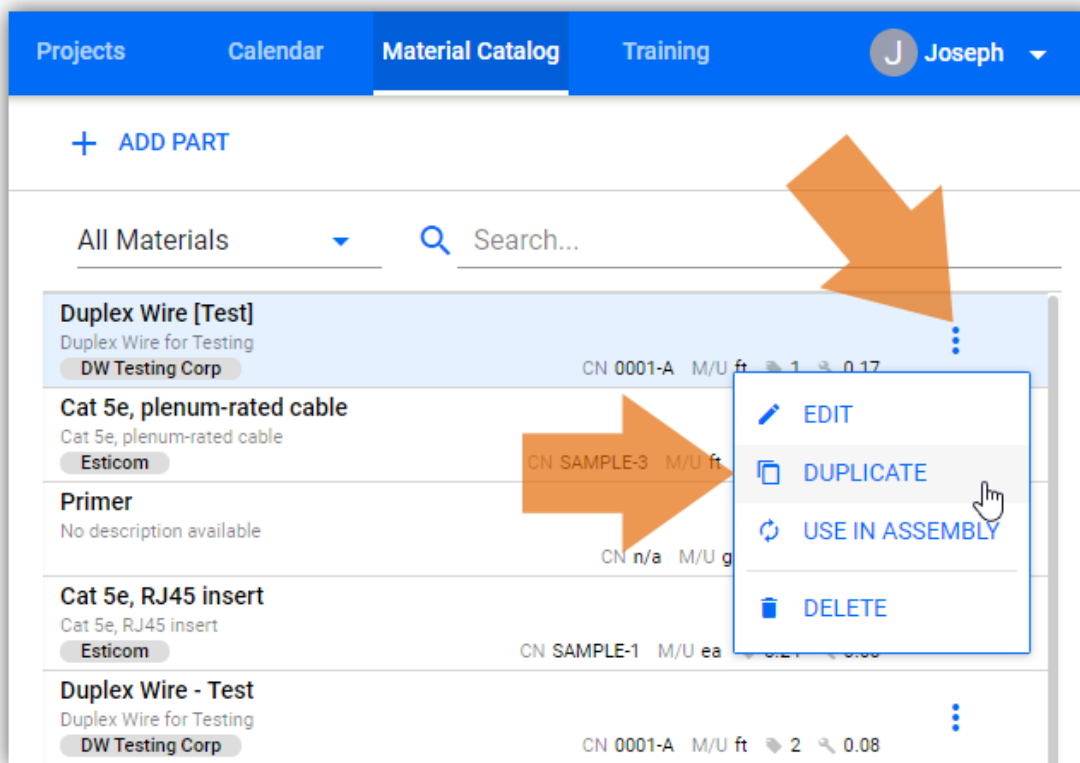
- On the **Module Menu**, click **Material Catalog**.



2. Use the **Search Bar** to find the part/assembly or use the **Filters** in the left pane.



3. Click the material's **More Options** button and select **Duplicate**.
 - a. The **Duplicate Part or Assembly** window will appear.



- Review the material information and edit the value of each field if necessary.

Duplicate Part or Assembly

☒ Part
 ☐ Assembly

Details

Part/Assembly name

Duplex Wire [Test]

Description

Duplex

Manufact

DW Tes

Catalog N

0001-A

Phase Name

Phase Code

PC001A

Cost Name

Cost Code

CC001

Unit of Measure

ft

Material cost

1

Labor rate (mins)

10

Catalog to include this material in

Custom

CANCEL

SAVE

- Click **SAVE** to create a duplicate material.

Cost Name

Cost Code

CC001

Unit of Measure

ft

Material cost

1

Labor rate (mins)

10

Catalog to include this material in

Custom

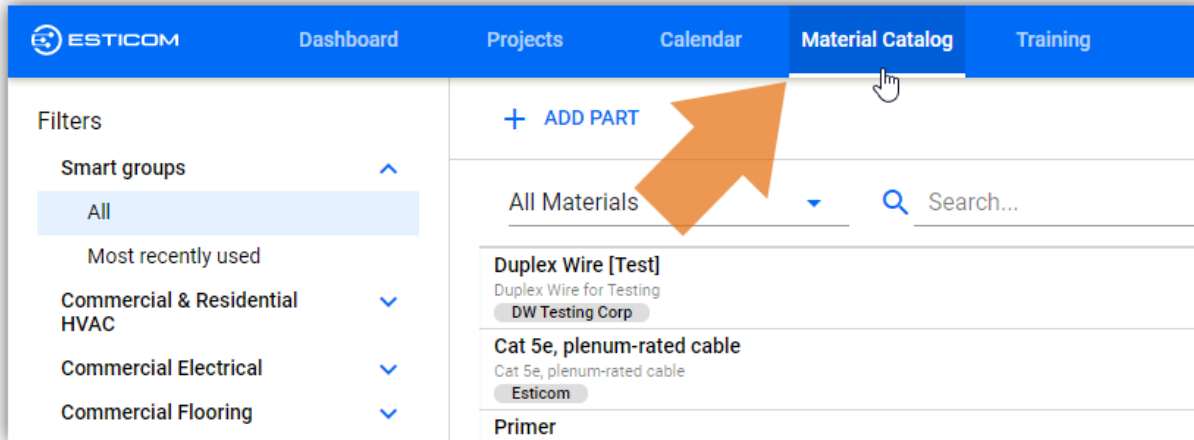
CANCEL

SAVE

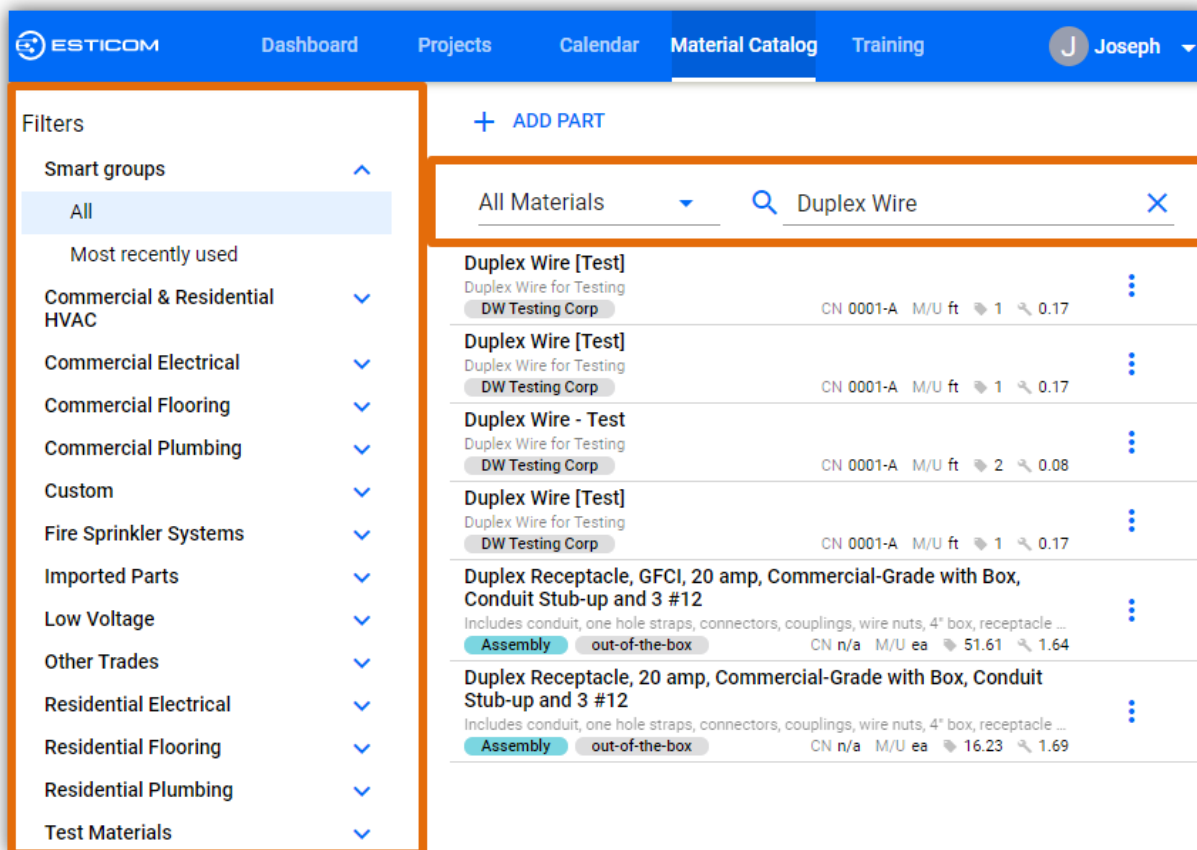
Use Parts in Assemblies

In this section, you will learn how to use parts to create an assembly. This option lets you select multiple materials and specify its details to create an assembly.

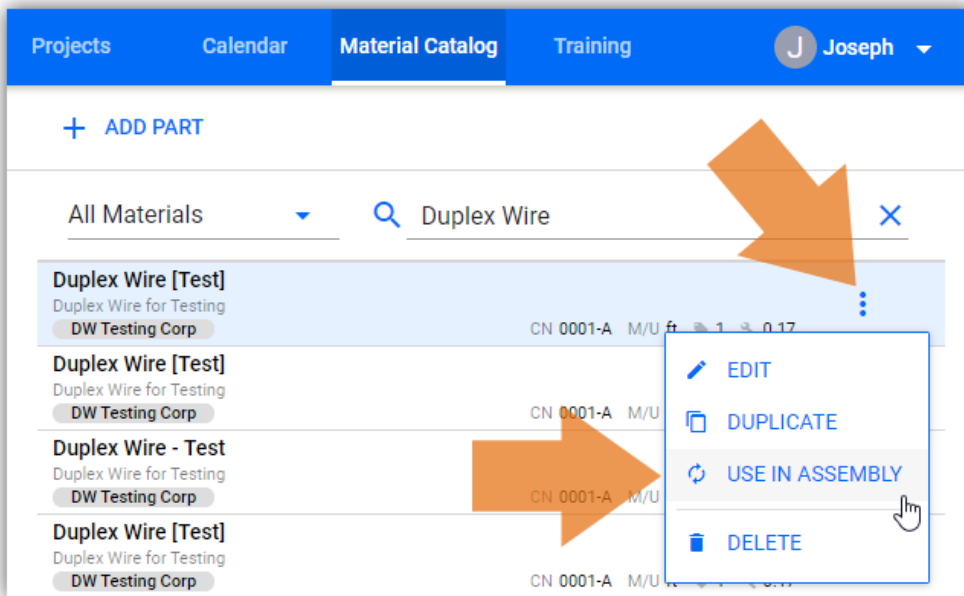
1. On the **Module Menu**, click **Material Catalog**.



2. Use the **Search Bar** to find the material or use the **Filters** in the left pane.



3. Click the material's **More Options** button and select **Use in Assembly**.
 - a. The **Create Part or Assembly** window will appear.



4. In this window, the selected part is added automatically. You can add more parts by manually selecting them. First, you need to find them using the **Search...** bar or the **BROWSE PARTS CATALOG** button. (See **Create Assemblies** for more info).
5. Specify the **Assembly Details**:

Create Part or Assembly

☐ Part
☒ Assembly

Parts included (1)

Search...

1

Duplex W

Duplex Wire

DW Testi

Part/Assembly name

Test Assembly

Description

Test Assembly

Manufacturer

Esticom Test Products

Catalog Number

CN03

Phase Name

PN03

Phase Code

PC03

Cost Name

CN03

Cost Code

CC03

Unit of Measure

ea

Material cost

1

Calculated from parts

Labor rate (mins)

10

Calculated from parts

Catalog to include this material in

Custom

CANCEL

SAVE

Field	Instructions
Part/Assembly Name	Enter the assembly name.
Description	Enter the assembly description.
Manufacturer	Enter the Manufacturer Name if necessary.
Catalog Number	Enter the assembly's catalog number.
Phase Code	Enter the assembly's phase code.
Cost Code	Enter the assembly's cost code.
Unit of Measure	Click the drop-down arrow to select the assembly's appropriate unit of measurement.
Material Cost	By default, this field displays a calculated value from selected parts.
Labor rate (mins)	By default, this field displays a calculated value from selected parts.
Catalog to include this material in	Click the drop-down arrow to select a catalog where you want this assembly/material to be included in. Note: add this material to a new catalog by clicking the New Catalog link.

6. Review the specified details and click **SAVE** to create the assembly

Unit of Measure: ea

Material cost: 1
Calculated from parts

Labor rate (mins): 10
Calculated from parts

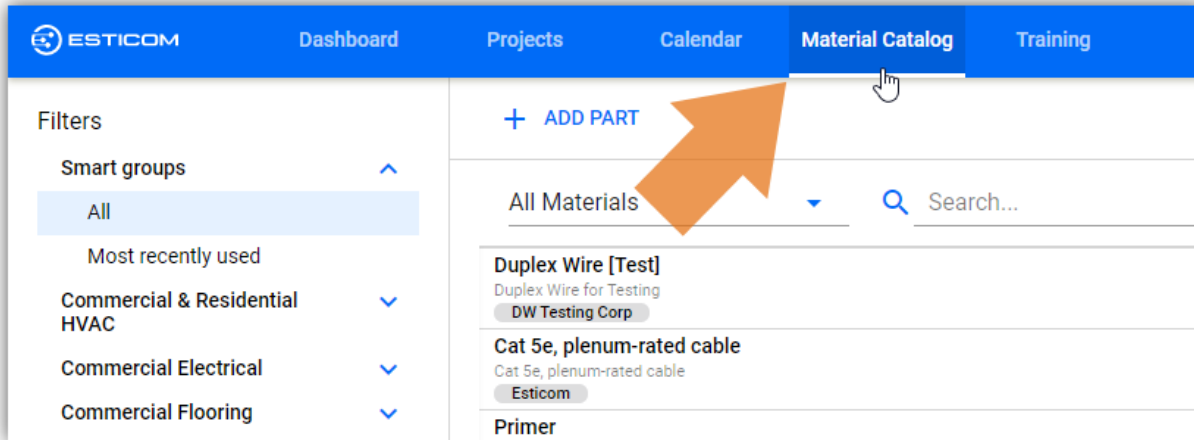
Catalog to include this material in: Custom

CANCEL SAVE

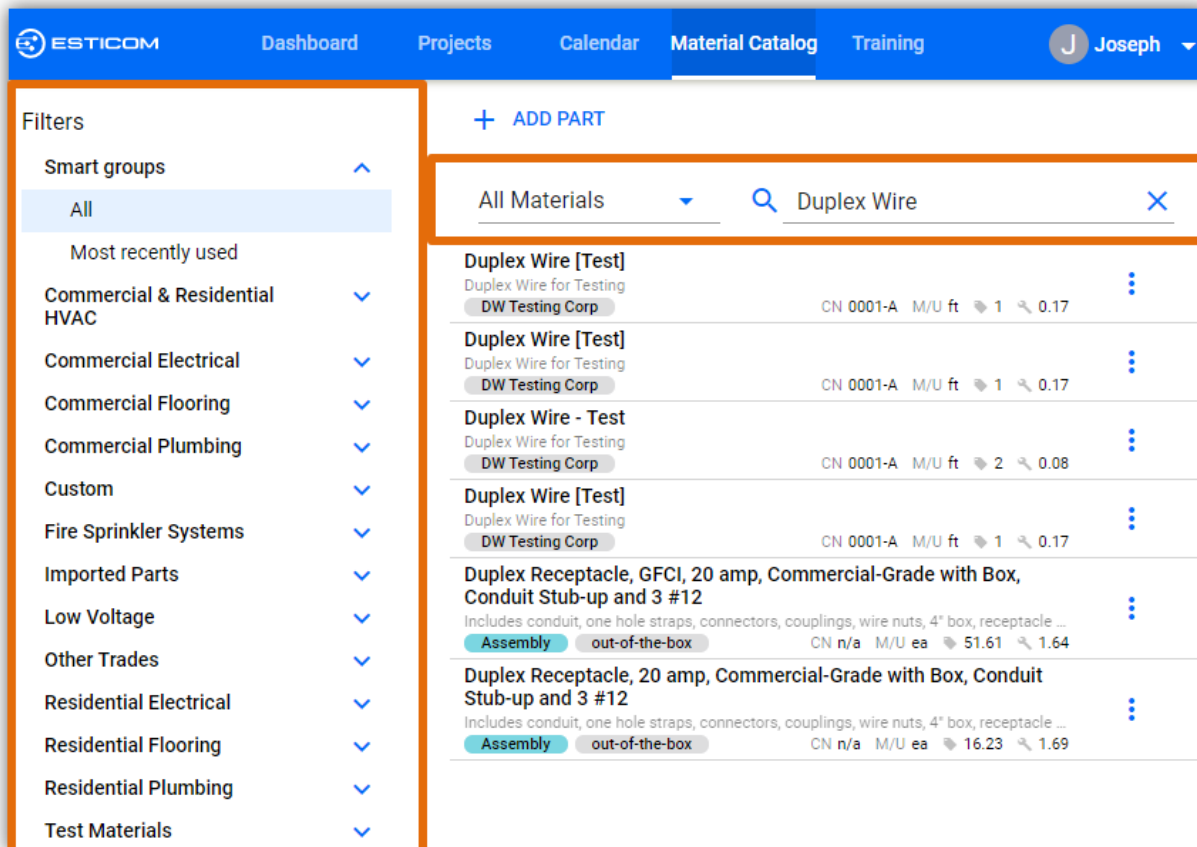
Deleting Parts/Assemblies

In this section, you will learn how to delete materials using the Material Catalog module.

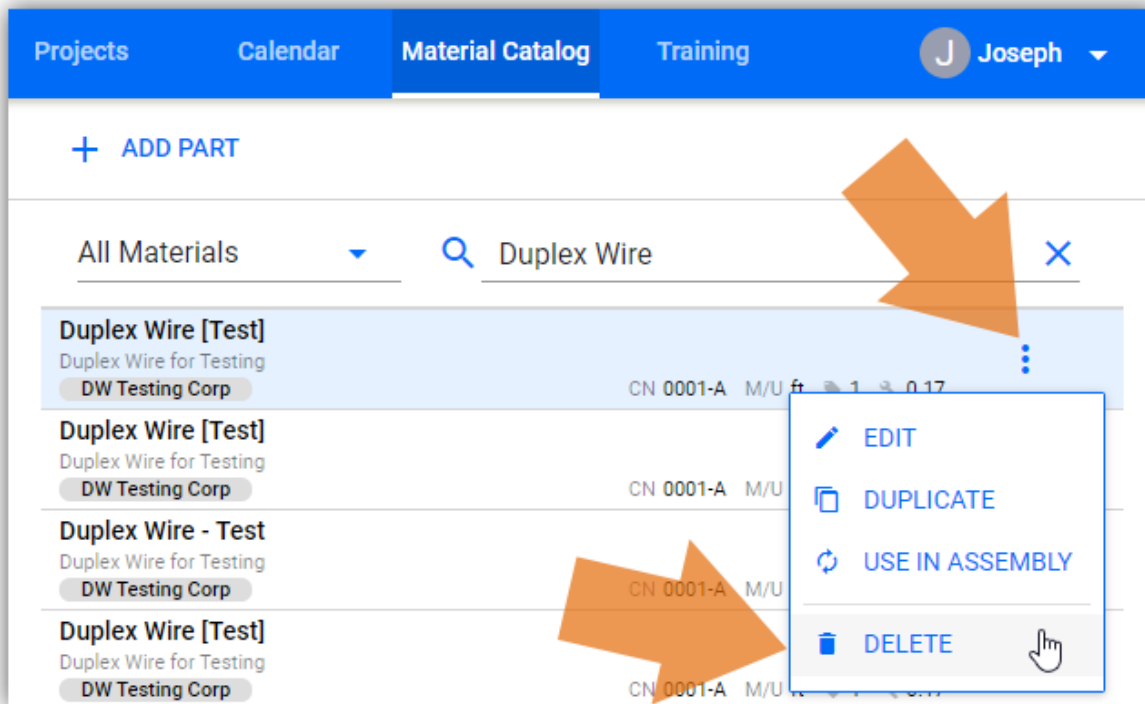
1. On the **Module Menu**, click **Material Catalog**.



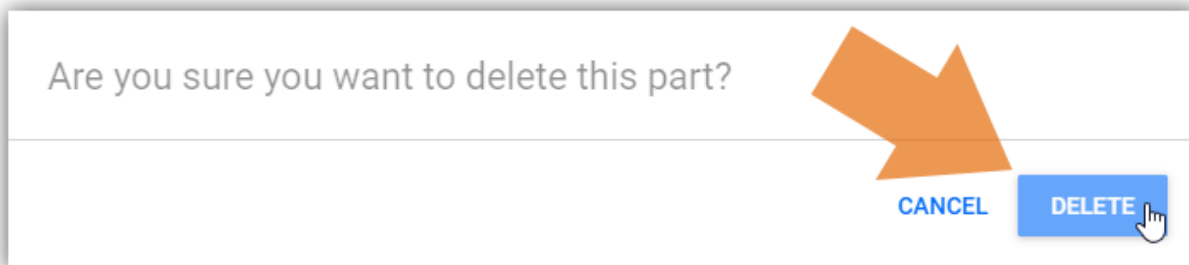
2. Use the **Search Bar** to find the part/assembly or use the **Filters** in the left pane.



3. Click the part/assembly's **More Option** button and select **Delete** to remove the selected material.
 - a. A **Confirmation** dialog box will appear.

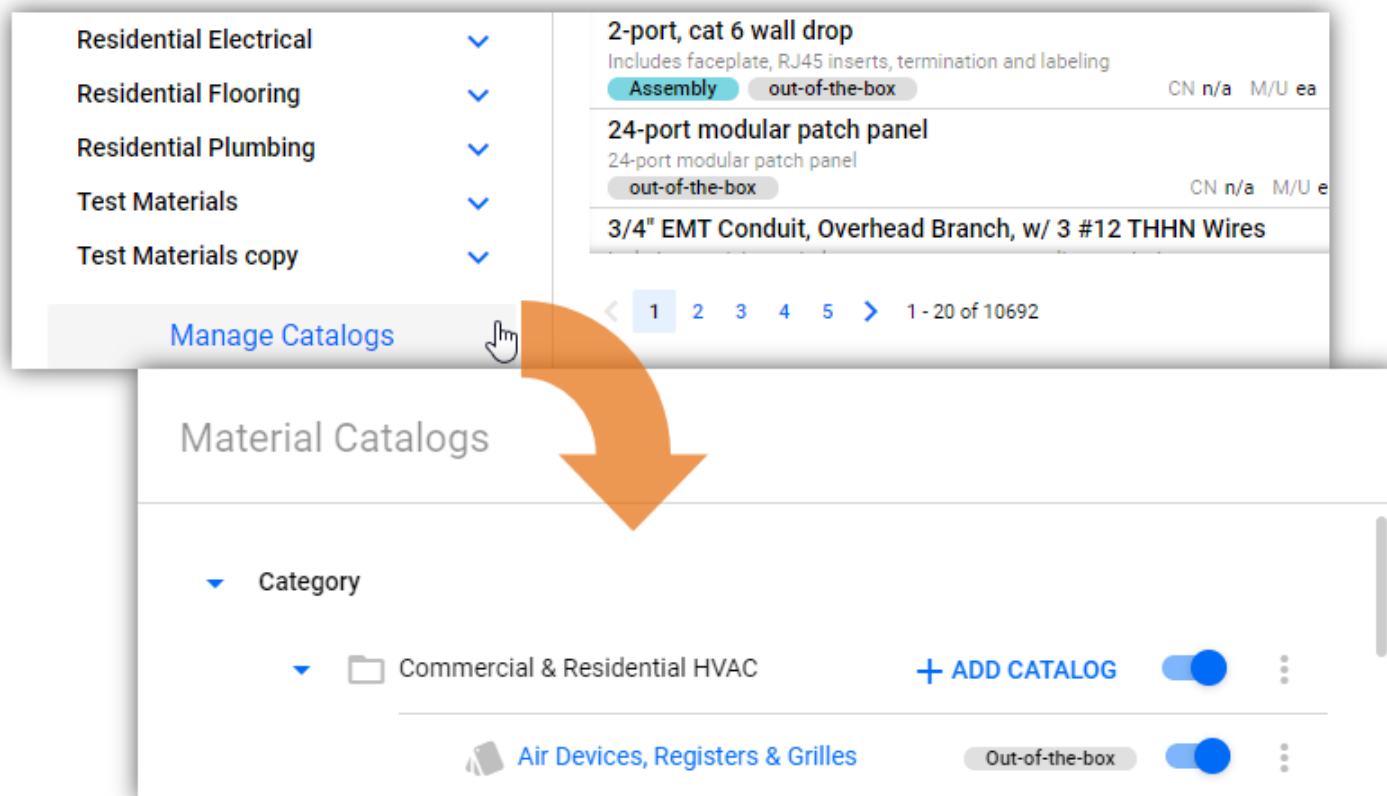


4. Click **DELETE** to continue deleting the selected material.



Manage Catalogs Link

The Manage Catalogs link lets you access the Material Catalogs window enabling you to manage materials by groups. See [Material Catalogs \(Account Menu\)](#).



Material Catalogs (Account Menu)

Access the Material Catalogs feature under the Account Menu located at the upper right hand of the page. This feature enables you to manage materials organized by groups. A custom group is created under the Custom Category and serves as the main folder of its category with sub-folders (catalogs) that contains the parts/assembly (list of materials).

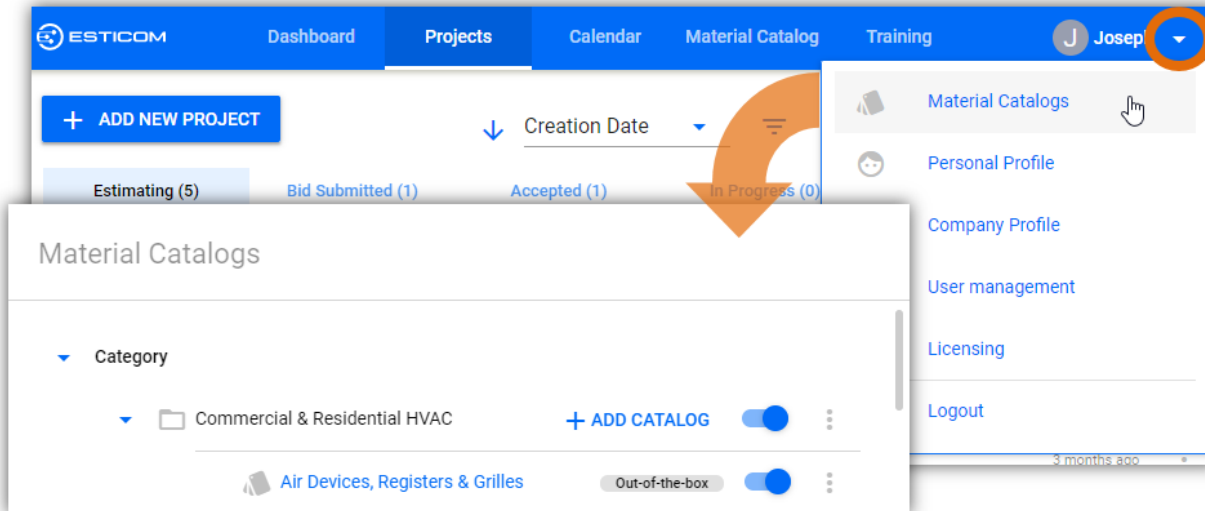
Groups

Esticom's Group feature lets you organize custom materials by groups. This method organizes materials by adding folders (group) and sub-folders (catalogs).

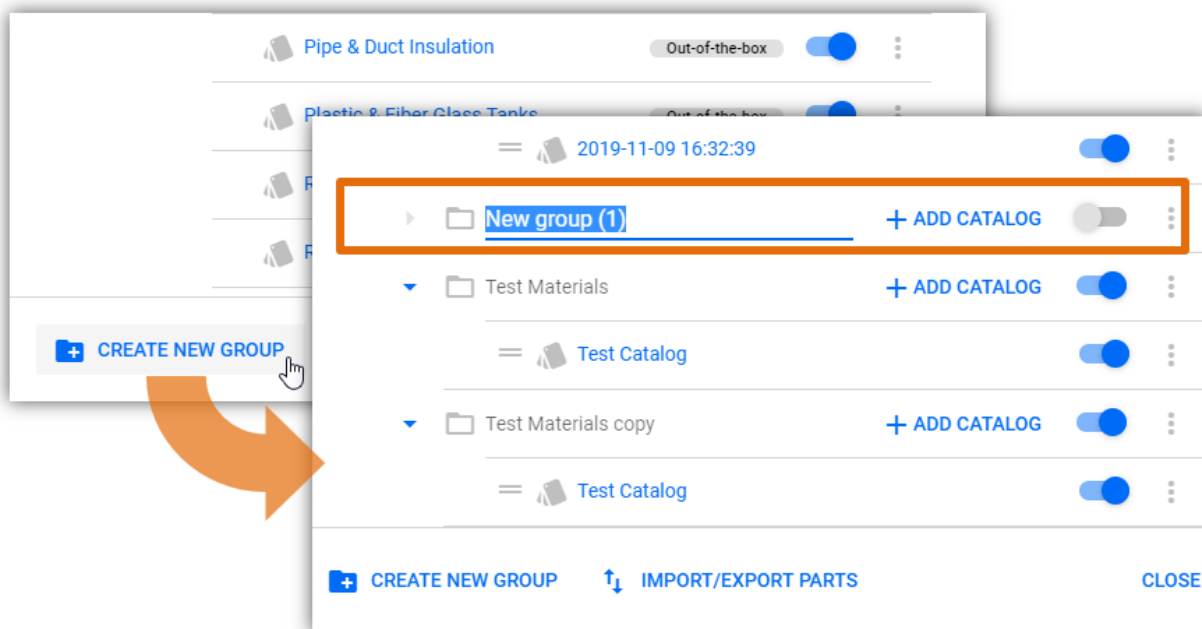
Create New Group

In this section, you will learn how to create new groups. Start organizing custom materials by creating a group and give it a recognizable name for easy access.

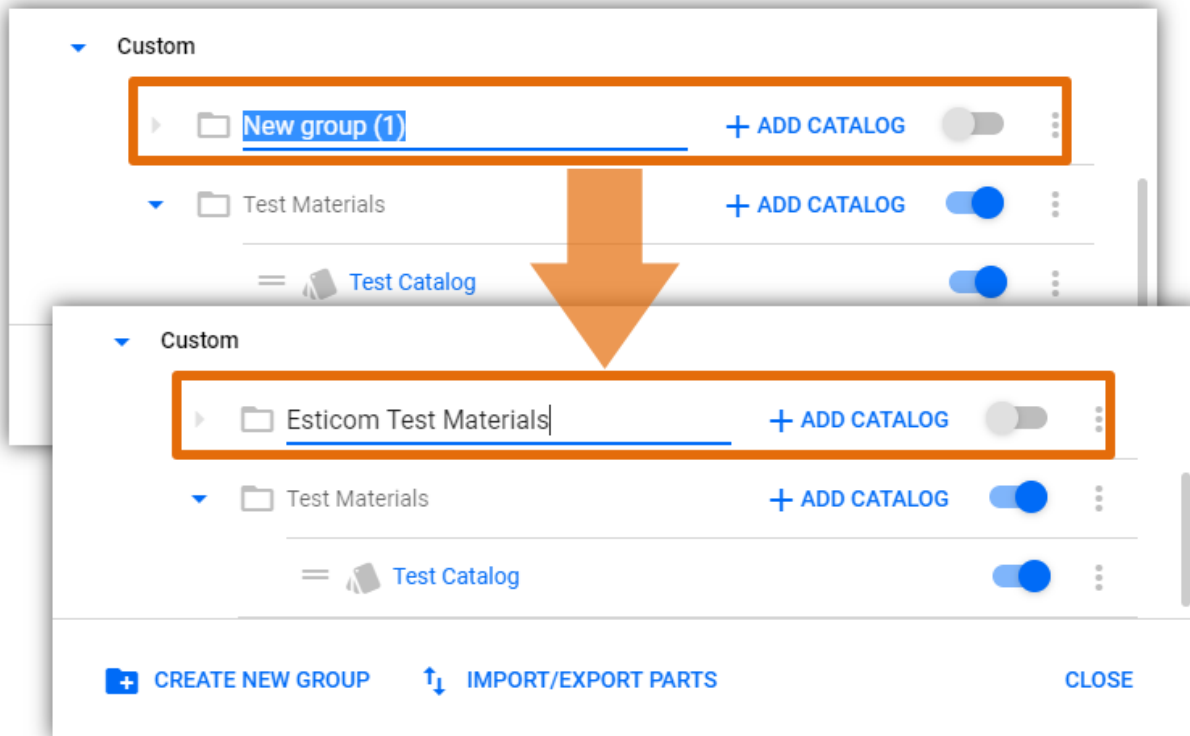
1. Click the **Account Menu** and select **Material Catalogs**.



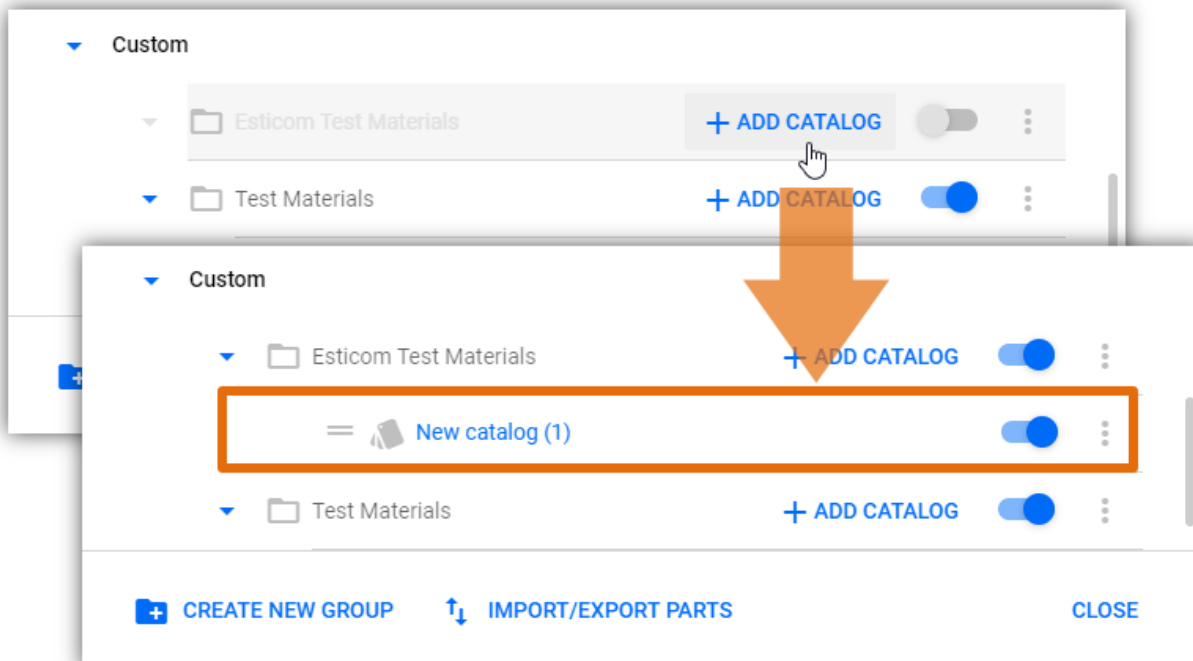
2. The **Material Catalogs** window will appear. To create a new group, click the **CREATE NEW GROUP** link.
 - a. A new group will be created under the **Custom** folder.



3. To rename the group, click its name and enter the group's new name.



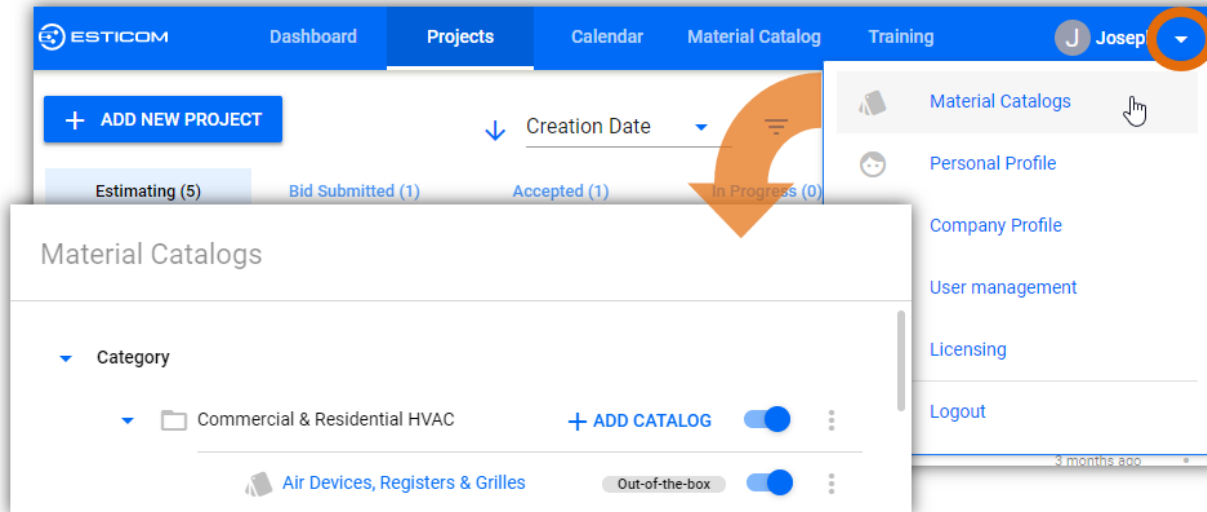
4. After creating the group, enable and manage it by adding catalogs to the group. See [Adding Catalogs to a Group](#).



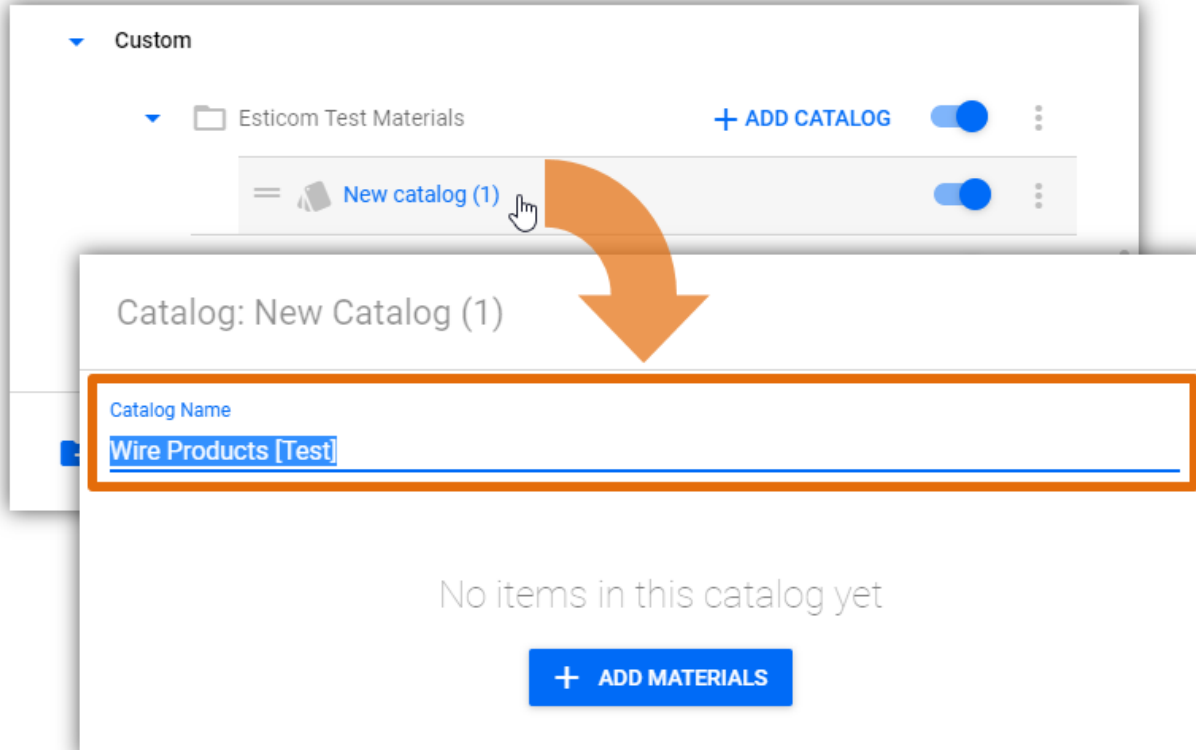
Adding Catalogs to Groups

In this section, you will learn how to add catalogs and activating newly created groups.

1. Enable the newly created group by adding parts/assembly, click its **+ ADD CATALOG** link to get started.
 - a. The **New catalog** sub-folder will be created under the group name.

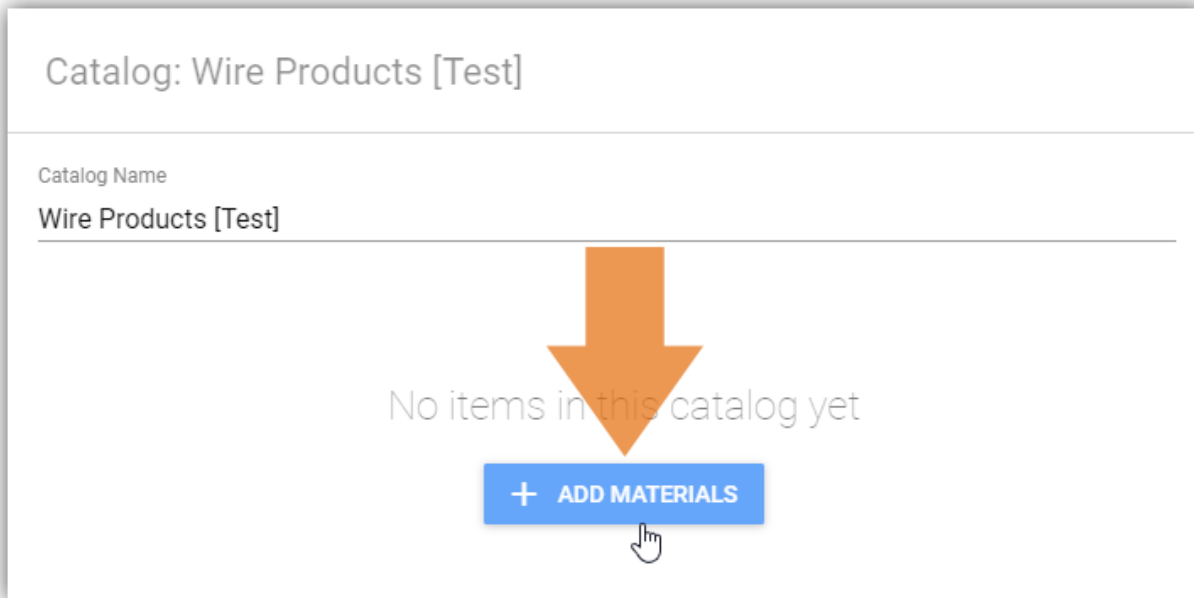


2. Click the **New catalog** sub-folder to manage it and add materials.
 - a. The **Catalog: New Catalog** window opens.



3. In the **Catalog Name** field, delete the existing name and enter your preferred catalog name.

4. To add materials to this catalog, click the **+ ADD MATERIALS** button.
 - a. The **Select Part or Assembly** window opens.



5. Select the **Checkbox** of each part/assembly to add to your catalog. You can add multiple parts/assembly by selecting checkboxes.

Select Part or Assembly

Filters

Smart groups

All

Most recently used

Commercial & Residential HVAC

Commercial Electrical

Commercial Flooring

Commercial Plumbing

Esticom Test Materials

Fire Sprinkler Systems

Low Voltage

Other Trades

Residential Electrical

Residential Flooring

Residential Plumbing

Test Materials

+ ADD PART

1

×

✓ SHOW SELECTED ONLY

selected

All Materials

Q

DUPLEX

×

☒

Duplex Wire [Test]

Duplex Wire for Testing

DW Testing Corp CN 0001- M/U ft 1 0.17

☐

Duplex Wire [Test]

Duplex Wire for Testing

DW Testing Corp CN 0001- M/U ft 1 0.17

☐

Duplex Receptacle, 20 amp, Commercial-Grade with Box, Conduit Stub-up and 3 #12

Includes conduit, one hole straps, conne...

Assembly out-of-the-box CN n/a M/U ea 16.23

☐

Duplex Receptacle, GFCI, 20 amp, Commercial-Grade with Box, Conduit Stub-up and 3 #12

Includes conduit, one hole straps, conne...

Assembly out-of-the-box CN n/a M/U ea 51.61

☐

Duplex receptacle wall plate, 2 gang, brass

Duplex receptacle wall plate, 2 gang, bra...

out-of-the-box CN n/a M/U ea 8.98 0.1

Duplex Receptacle, 15A

< 1 2 3 4 5 >

1 - 10 of 211

CANCEL

SELECT

6. After selecting the materials, click **SELECT**.
 - a. The selected material(s) will appear on the list.

25 | Page

- Click **Close** to complete the process.

Catalog: Wire Products [Test]

Catalog Name
Wire Products [Test]

☐

+ ADD MATERIAL

Search...

<input type="checkbox"/> <div> Duplex Wire [Test] Duplex Wire for Testing DW Testing Corp </div>	CN 0001-A M/U ft 1 0.17
---	-------------------------

< 1 > 1 - 1 of 1

CLOSE

View Group

In this section, you will learn how to access and view groups and their contents (materials).

- Click the **Account Menu** and select **Material Catalogs**.
 - The **Material Catalogs** window will appear.

ESTICOM
Dashboard
Projects
Calendar
Material Catalog
Training
J Josep

+ ADD NEW PROJECT

Creation Date

Estimating (5) Bid Submitted (1) Accepted (1) In Progress (0)

Material Catalogs
Personal Profile
Company Profile
User management
Licensing
Logout

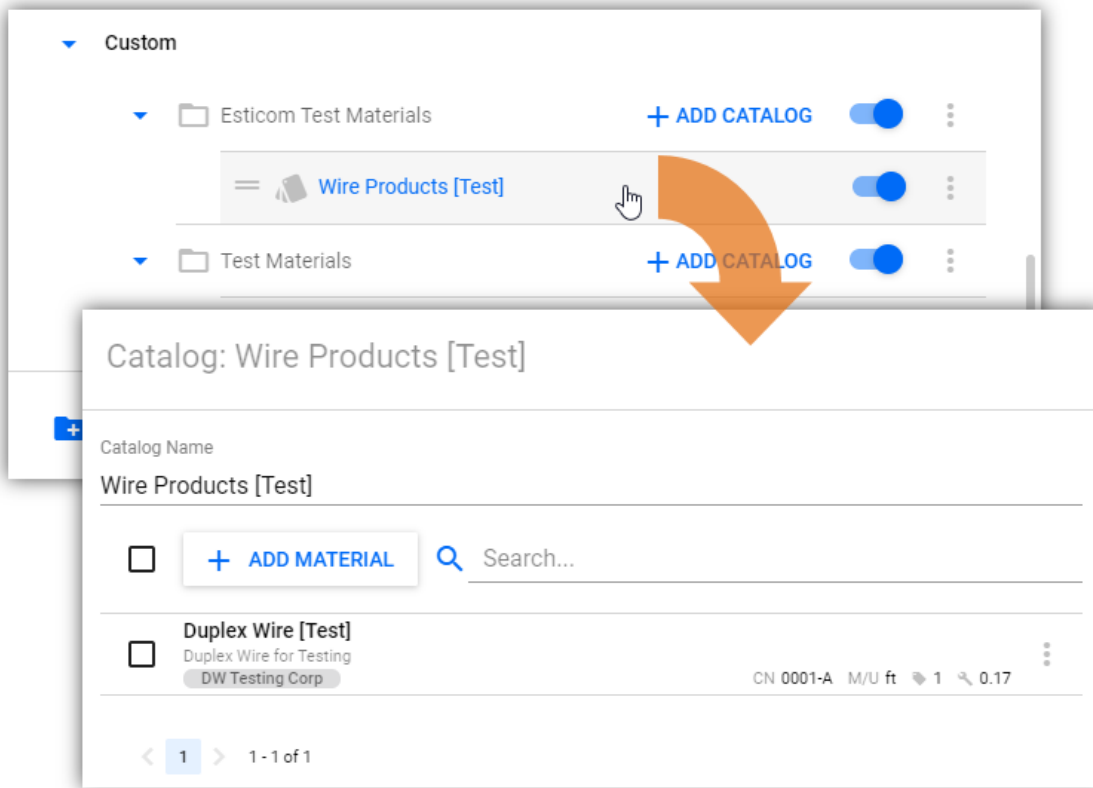
Material Catalogs

Category

Commercial & Residential HVAC
+ ADD CATALOG

Air Devices, Registers & Grilles
Out-of-the-box

2. Find and click the group to open the **Catalog <Catalog Name>** window.
 - a. The **Catalog <Catalog Name>** window opens.

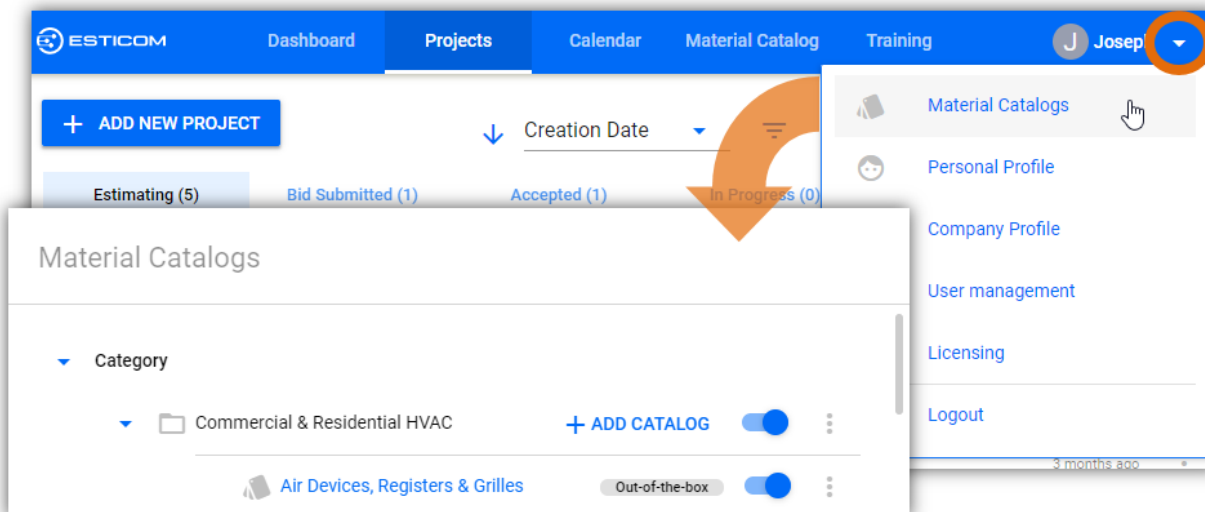


3. In this window, you can view the materials saved under the selected group.

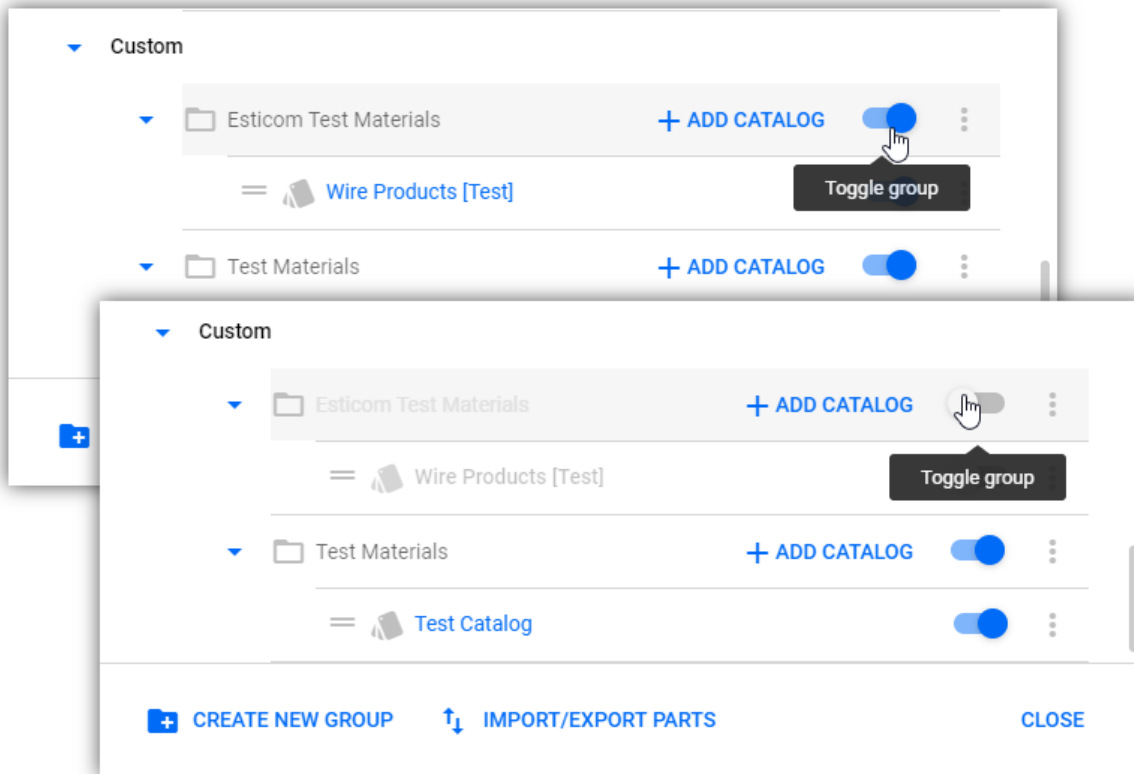
Enable/Disable Group (Toggle Group)

In this section, you will learn how to disable/enable groups using the Toggle group icon.

1. Click the **Account Menu** and select **Material Catalogs**.
 - a. The **Material Catalogs** window will appear.



- Find the **Group** that you want to enable/disable.

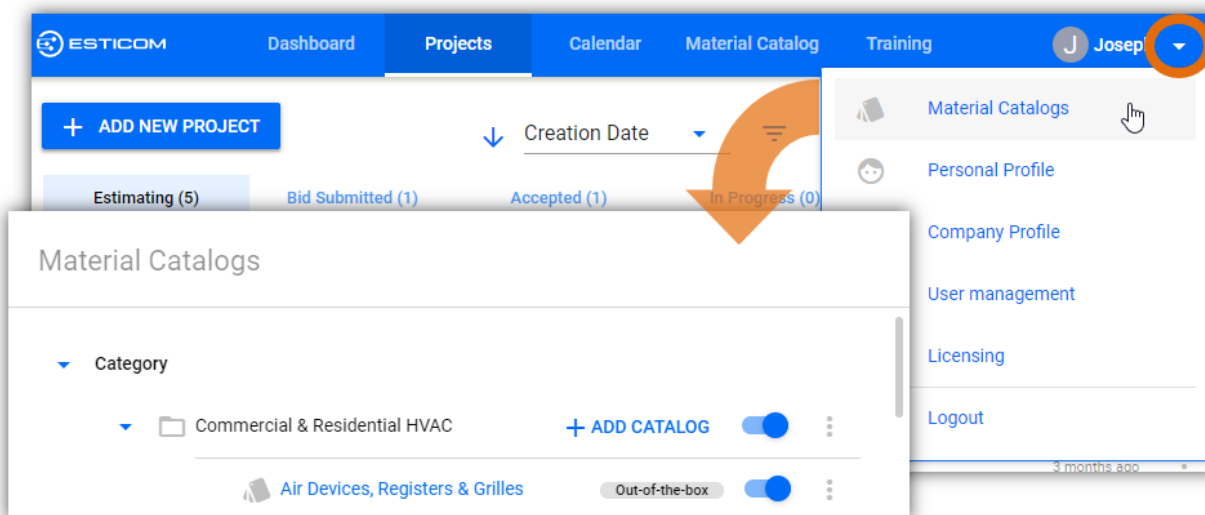


- Click the **Toggle Group** icon to enable/disable.
 - Note:** **Grayed out** icon means disabled and icons in **Blue** are enabled.

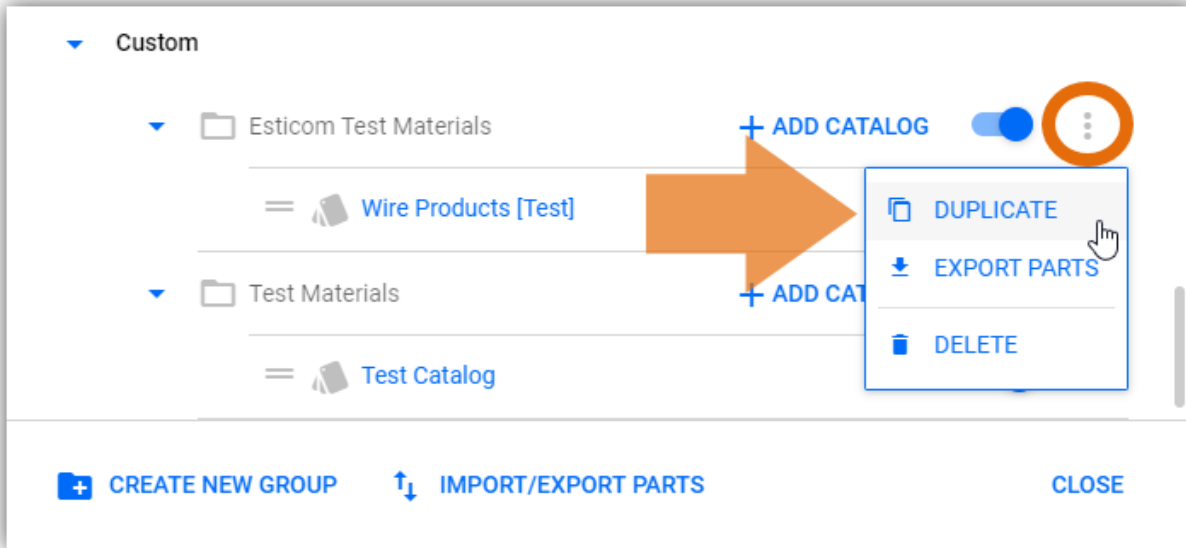
Duplicate Group

In this section, you will learn how to duplicate groups and the materials saved under the selected groups.

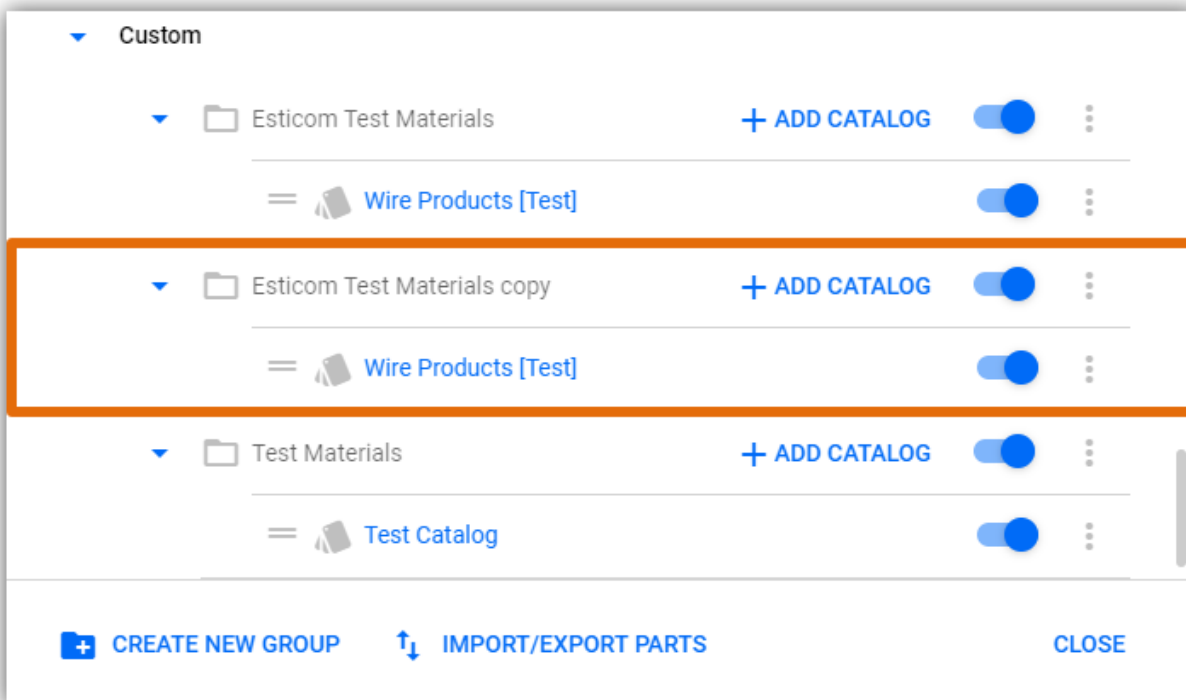
- Click the **Account Menu** and select **Material Catalogs**.
 - The **Material Catalogs** window will appear.



2. Find the **Group** that you want to duplicate.
 - a. A duplicate sub-folder will appear under the **Custom** folder. The duplicated group retains its name but with the word **copy** after it, indicating that it is a copied version.



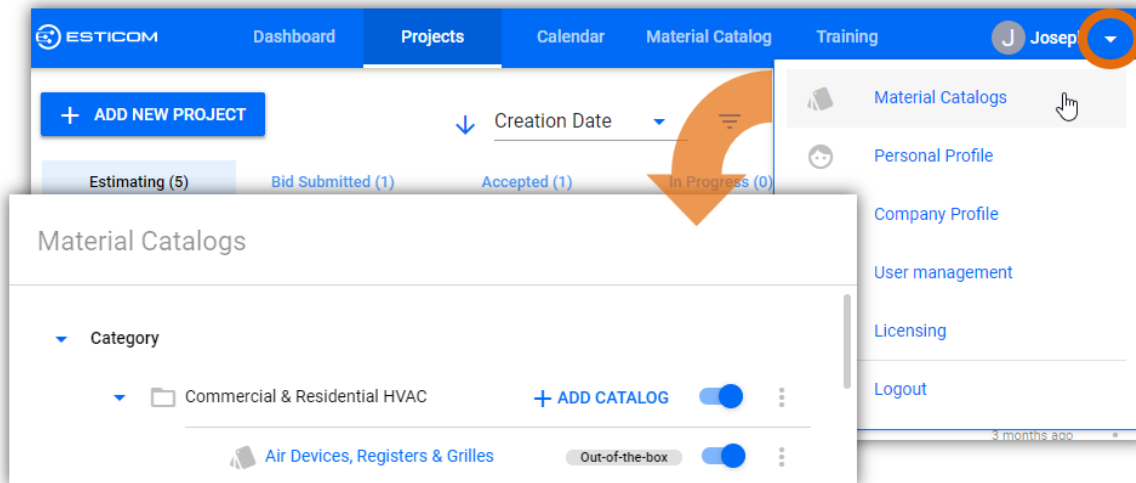
3. Review the duplicated version and update it if necessary.



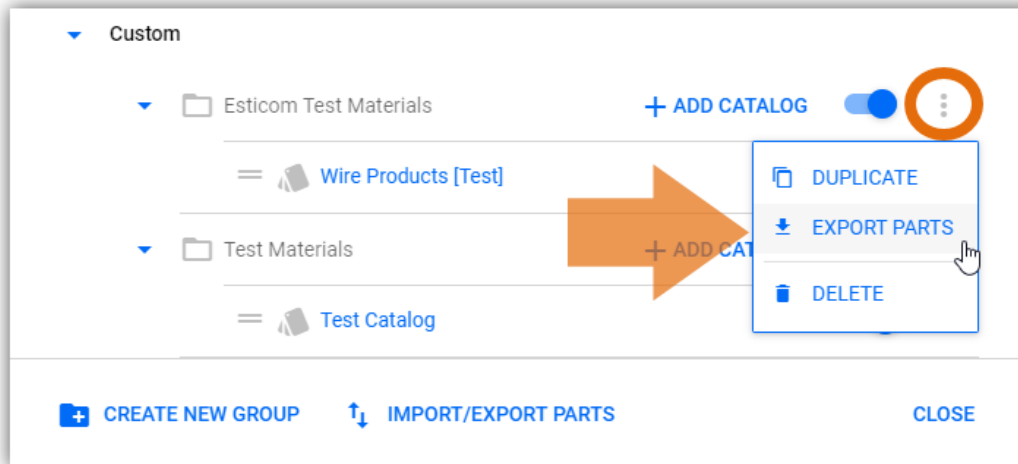
Export Parts

In this section, you will learn how to export materials to Excel. Exported files will be downloaded to your device's Downloads folder.

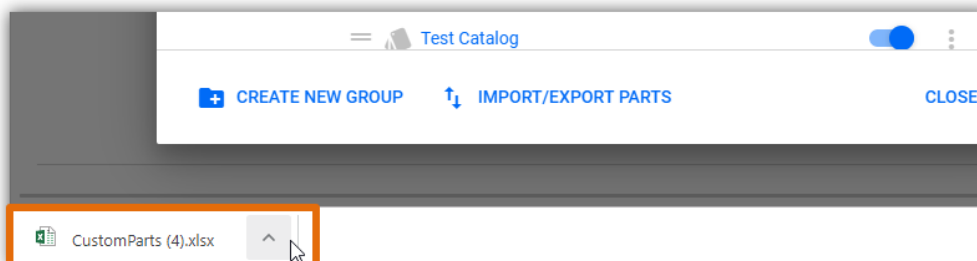
1. Click the **Account Menu** and select **Material Catalogs**.
 - a. The **Material Catalogs** window will appear.



2. Find the **Group** that you want to export and click its **More Options** button to display additional options.



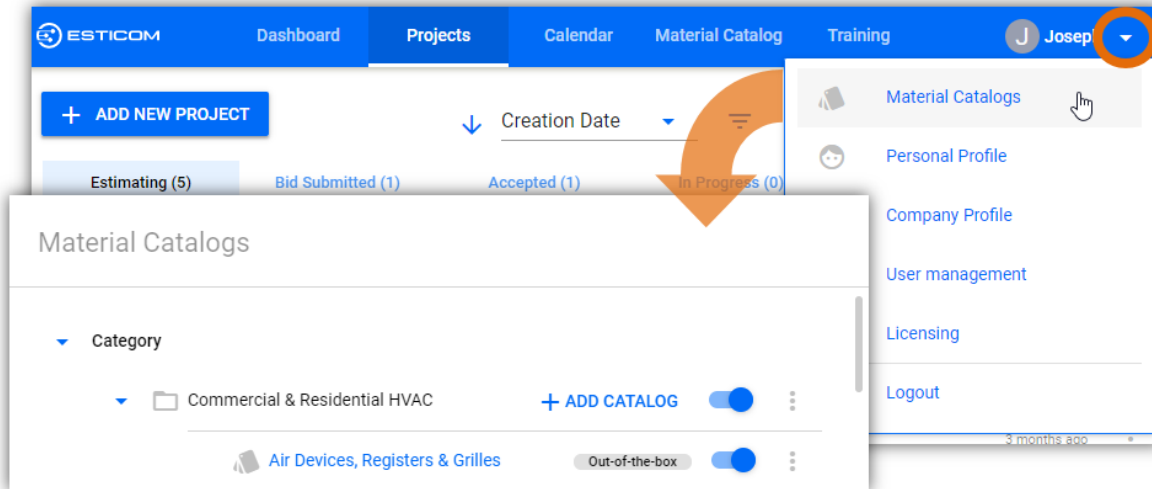
3. Select the **EXPORT PARTS** to download the selected group's parts.
 - a. An **Excel** file will be downloaded to your device.
4. Find the downloaded file and open it to view.



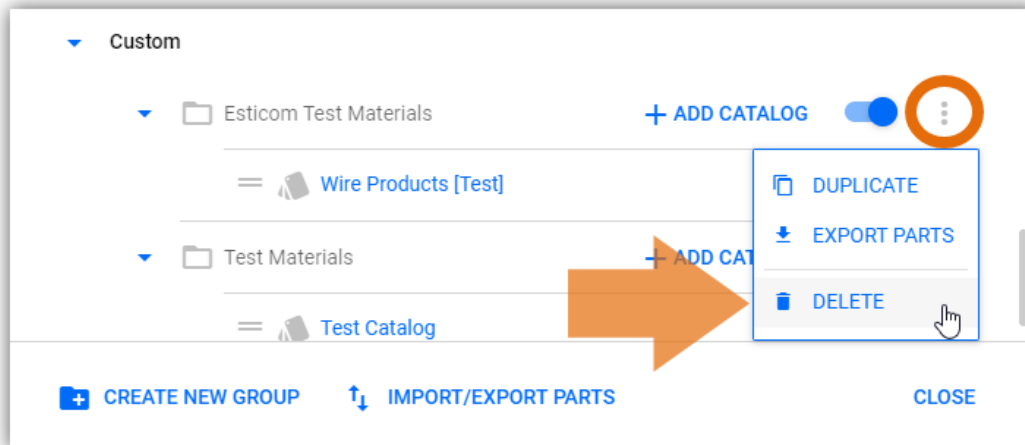
Delete Groups

In this section, you will learn how to delete existing groups along with the materials saved under the selected groups.

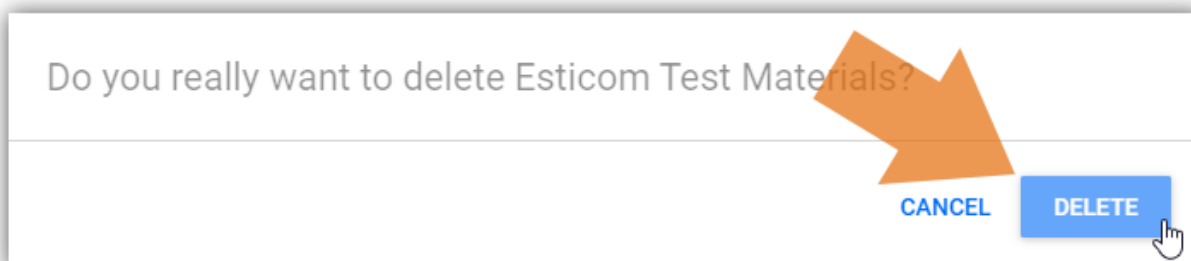
1. Click the **Account Menu** and select **Material Catalogs**.
 - a. The **Material Catalogs** window will appear.



2. Find the **Group** that you want to delete and click its **More Options** button to display additional options.



3. Select **DELETE** to delete the selected group.
 - a. A **Confirmation** dialog box will appear.
4. Click **DELETE** to continue deleting the selected group.



Import Materials

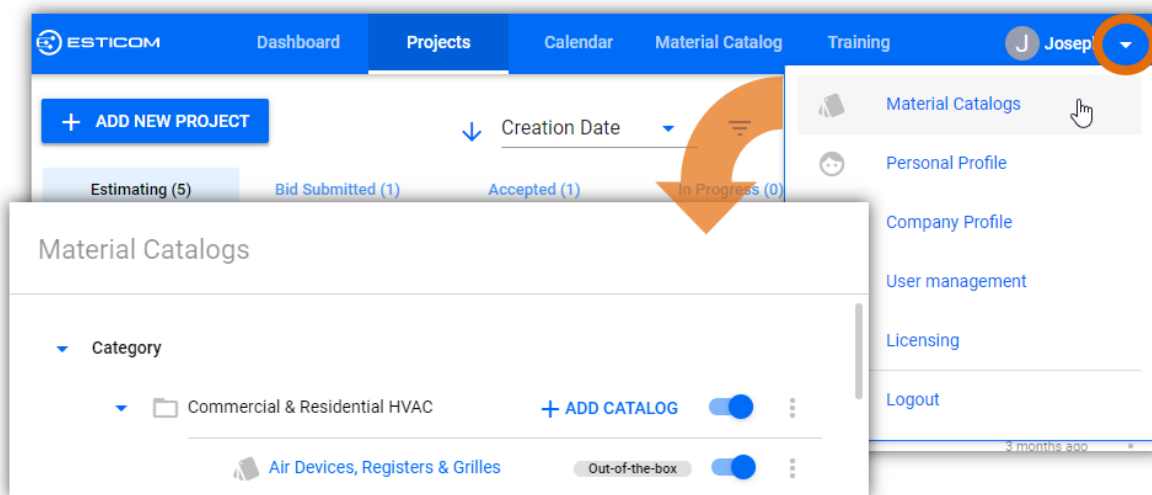
Esticom enables you to import bulk parts/assembly data using the Import materials feature. This feature also provides pre-formatted templates that you can use when uploading custom materials.

Downloading Templates

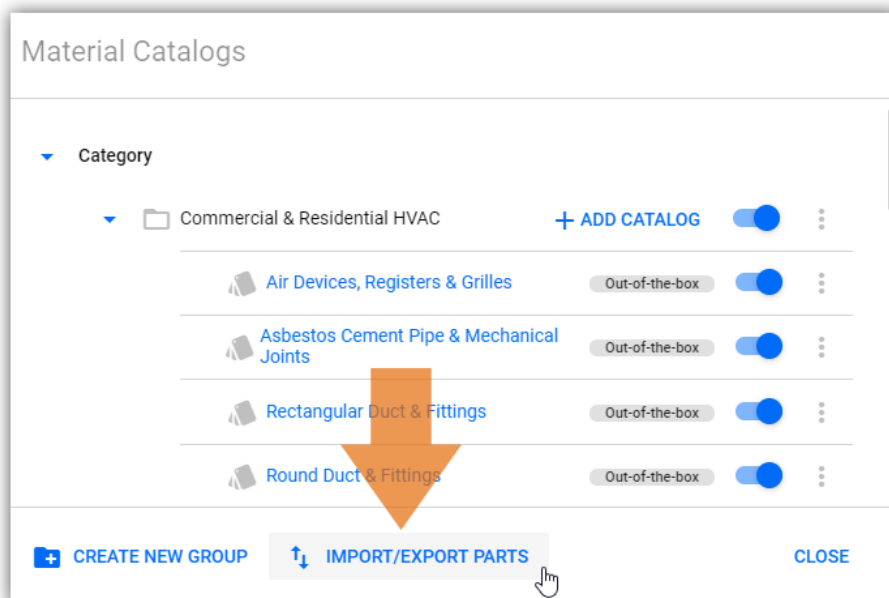
In this section, you will learn how to download the materials template so you can import custom materials to Esticom using the preformatted Excel file.

Use these templates to add custom materials to Esticom and organize its details according to its appropriate headers.

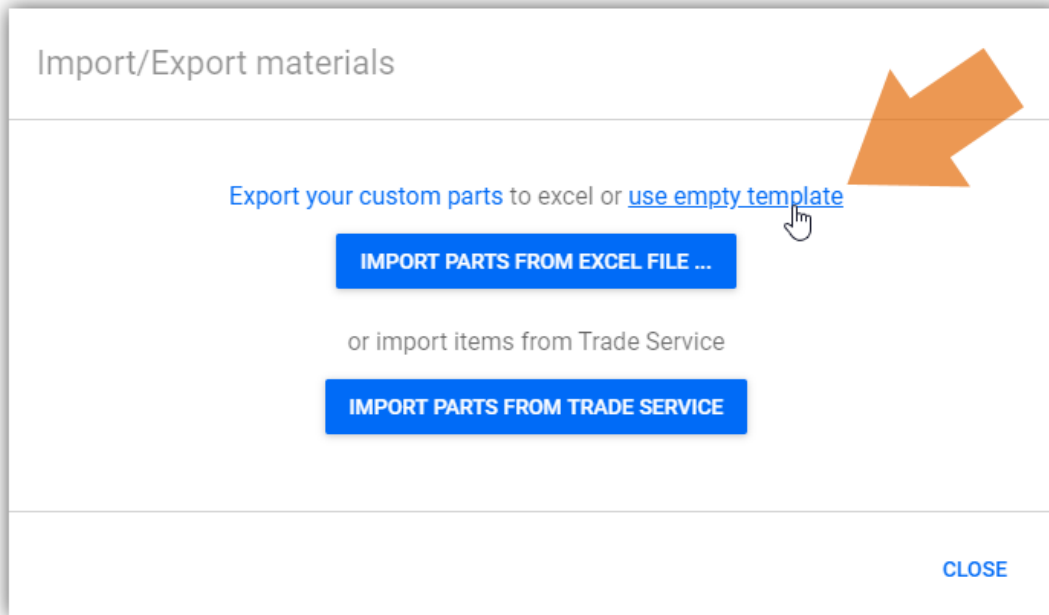
1. Click the **Account Menu** and select **Material Catalogs**.
 - a. The **Material Catalogs** window will appear.



2. Click the **IMPORT/EXPORT PARTS** link.
 - a. The **Import/Export materials** window opens.

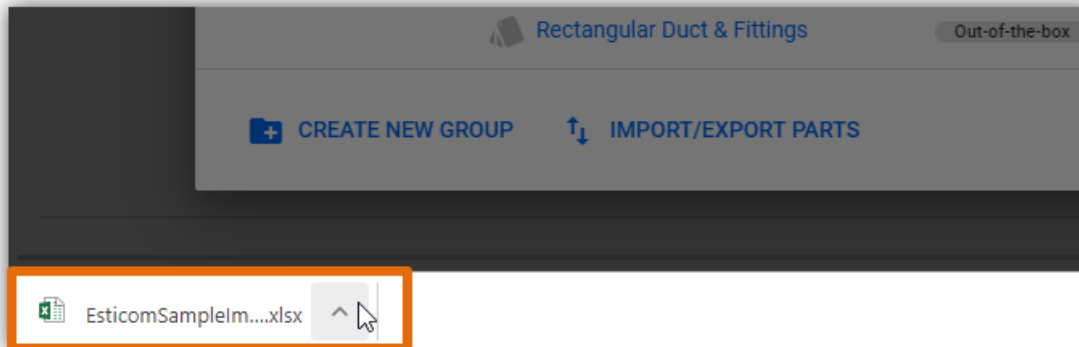


3. In this window, there are two (2) templates that you can download:



Template	Description
Use empty template	Use this template to add new parts/assemblies.
Export your custom parts	Use this template to update existing parts.

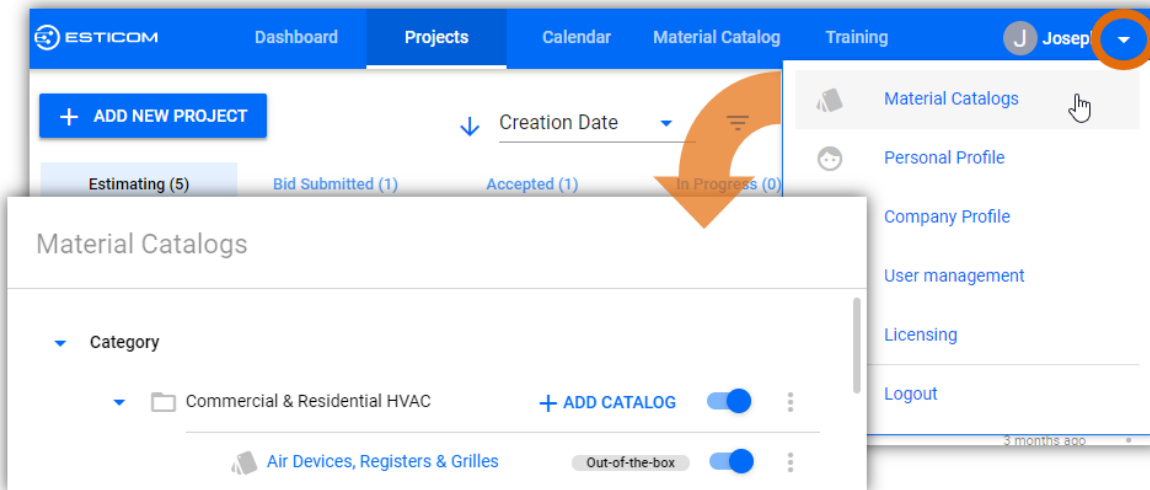
4. After clicking the appropriate link, the template will be downloaded to your device.
 - a. **Note:** in this example, we clicked the **use empty template** link.
5. Find and open the downloaded file from your device to start importing new materials or update existing ones.



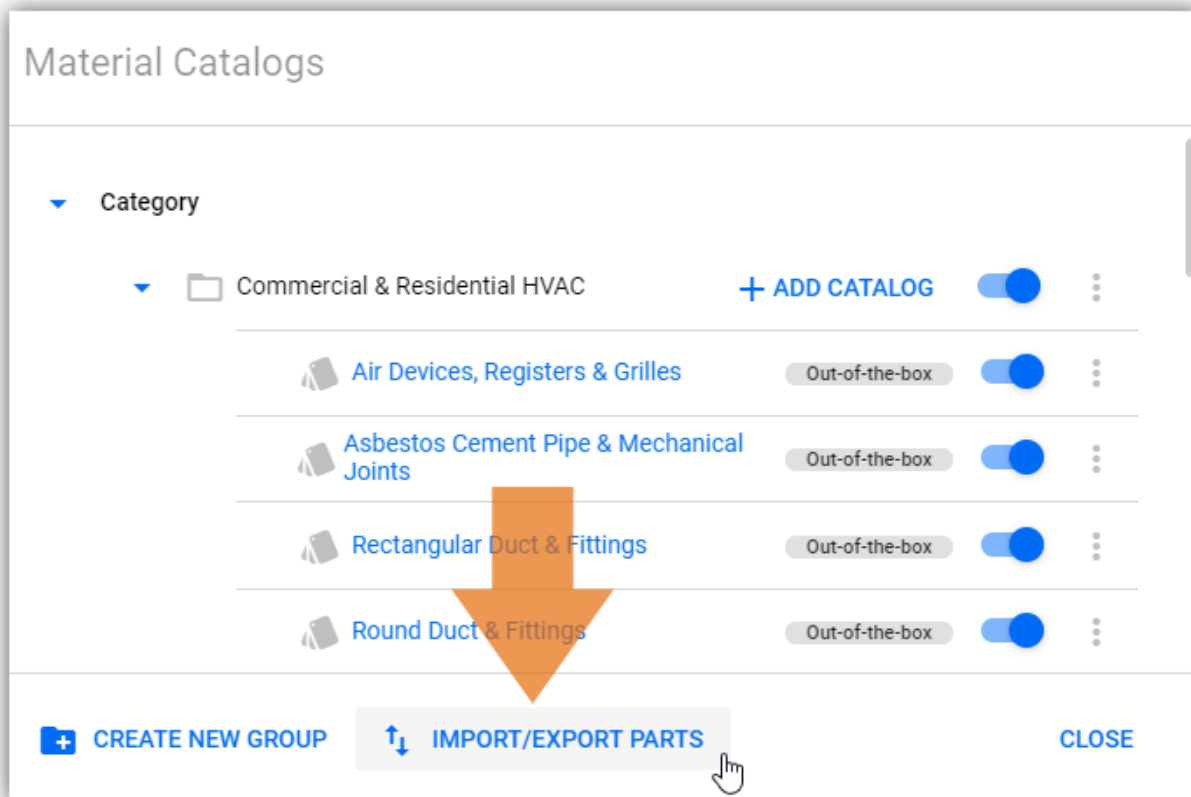
Importing New Materials from Excel File

Upload your materials to Esticom using the pre-formatted templates and this option. You can hide global materials and use your preferred materials by importing them to Esticom.

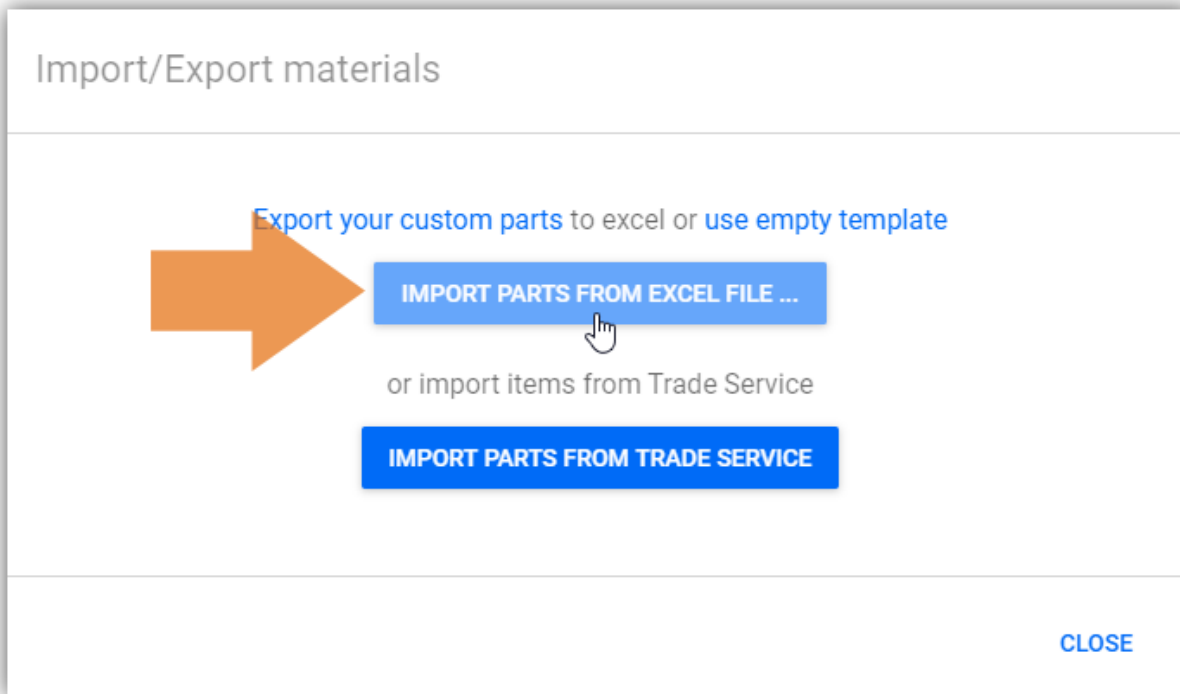
1. Click the **Account Menu** and select **Material Catalogs**.
 - a. The **Material Catalogs** window will appear.



2. Click the **IMPORT/EXPORT PARTS** link.
 - a. The **Import/Export materials** window opens.

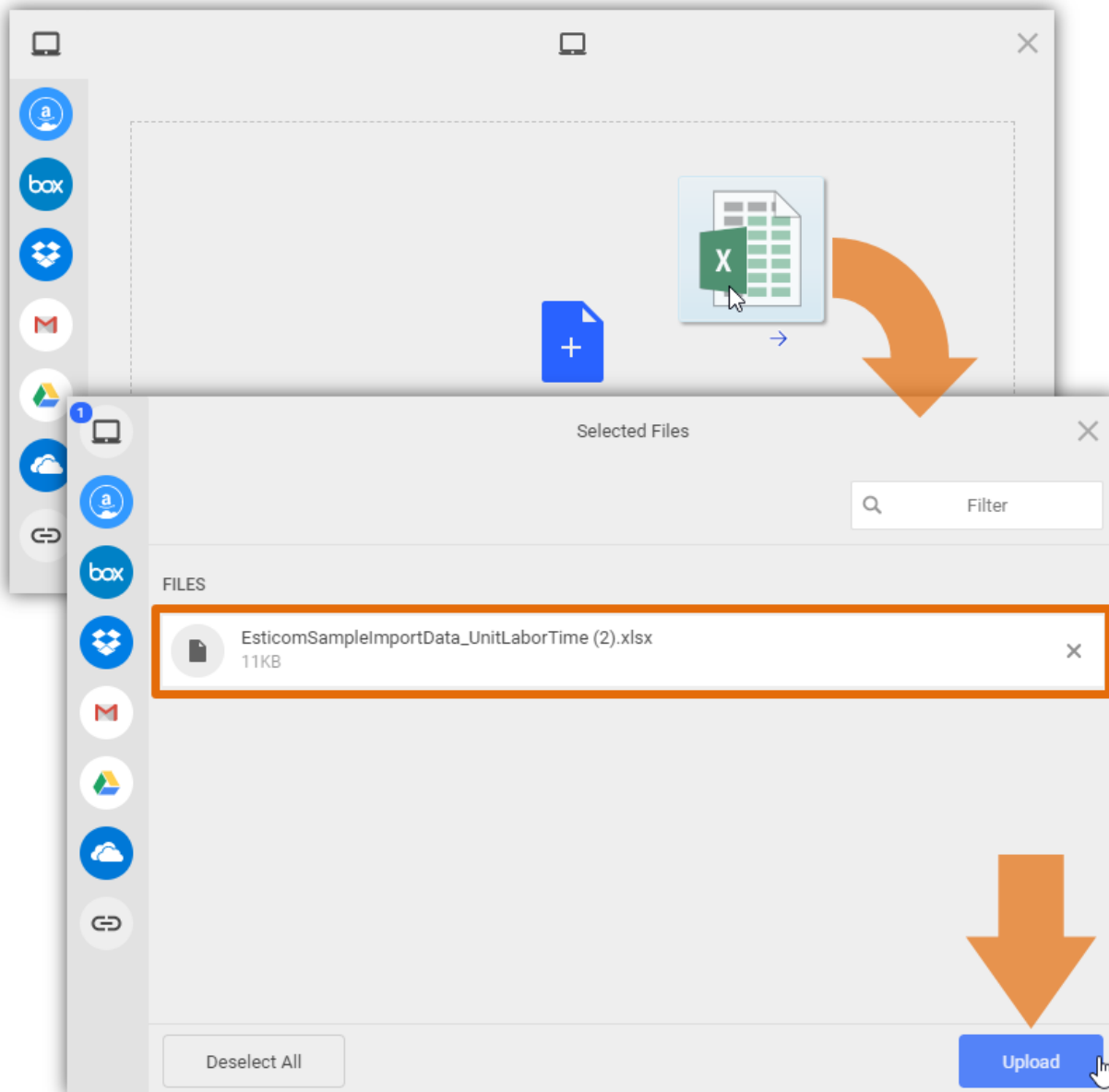


3. Click the **IMPORT PARTS FROM EXCEL FILE...** button.
 - a. The **Select Files to Upload** window will appear.



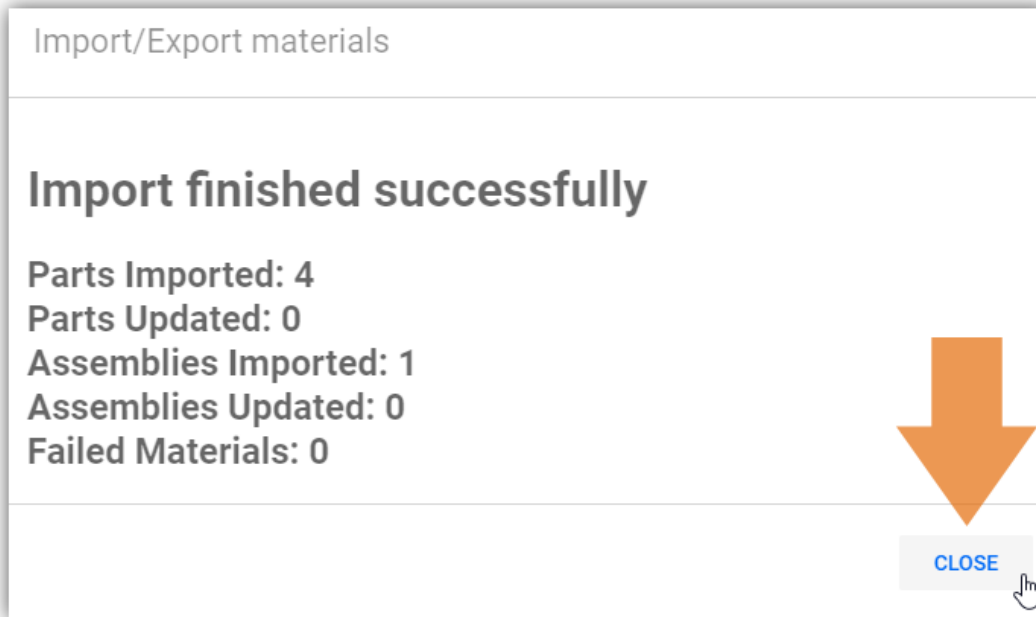
4. In this window, you can use different options to upload the files, namely:
 - a. My Device
 - b. Cloud Drive
 - c. Box
 - d. Dropbox
 - e. Gmail
 - f. Google Drive
 - g. OneDrive
 - h. Link (URL)
 - i. **Note:** some of the options require you to connect Esticom to these third-party platforms (e.g. Box, Dropbox, Gmail, etc.)
5. In this example, we used the **My Device** option to import new materials.

6. To upload files with ease, simply **Drag** the file from the source folder and **Drop** it in the **Select Files to Upload** window.
 - a. **Note:** you can also copy the appropriate file(s) and paste it in the **Select Files to Upload** window or click the **Plus (+)** icon to manually search the file.



7. After selecting the file, click the **Upload** button.
 - a. A **Confirmation** dialog box will appear indicating that the file(s) was successfully imported.

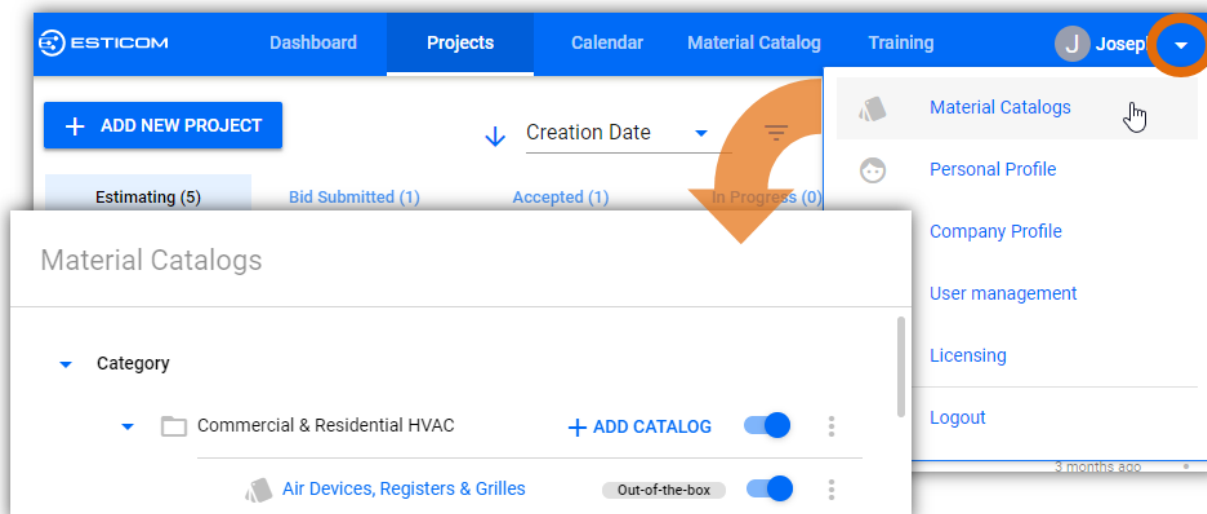
8. Click the **CLOSE** button to close the dialog box.



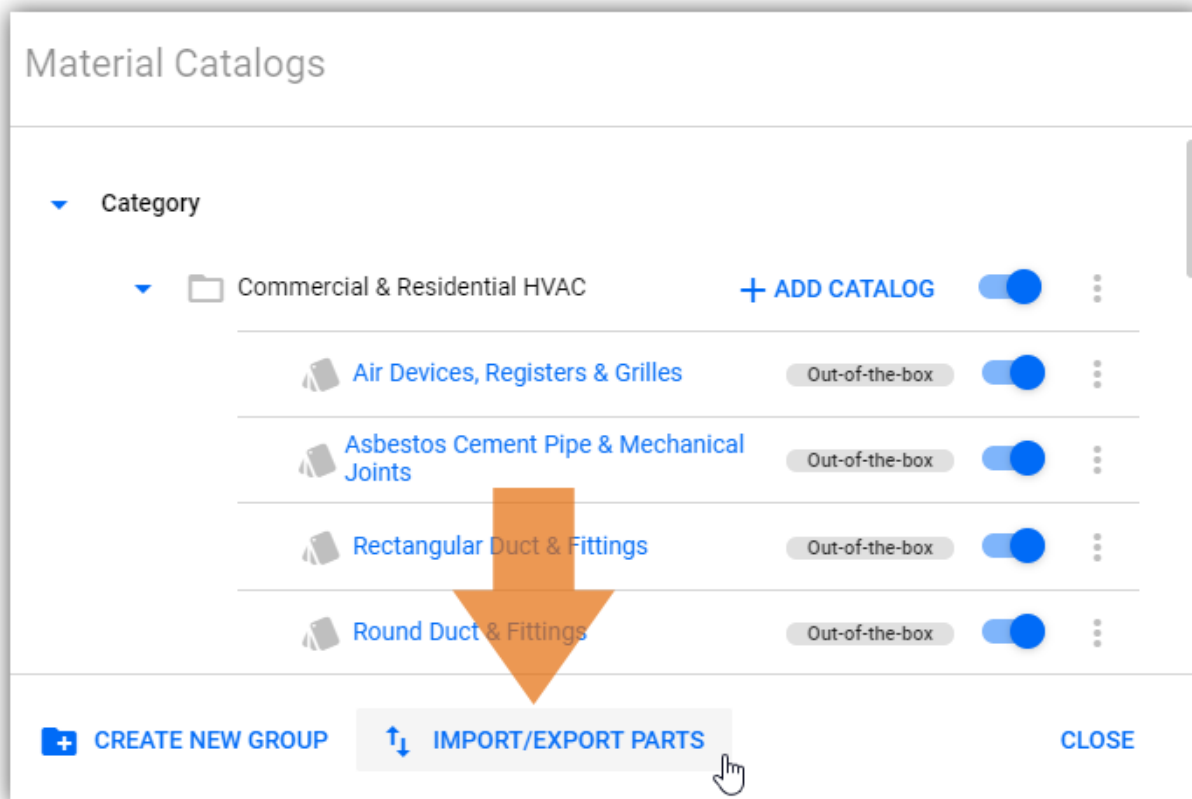
Importing Parts from Trade Service

Use the IMPORT PARTS FROM TRADE SERVICE option to upload materials from Trade Service. It is worth noting that Trade Service have their own format. You can get the Trade Service Template when you export your data from them and import it to Esticom using this option.

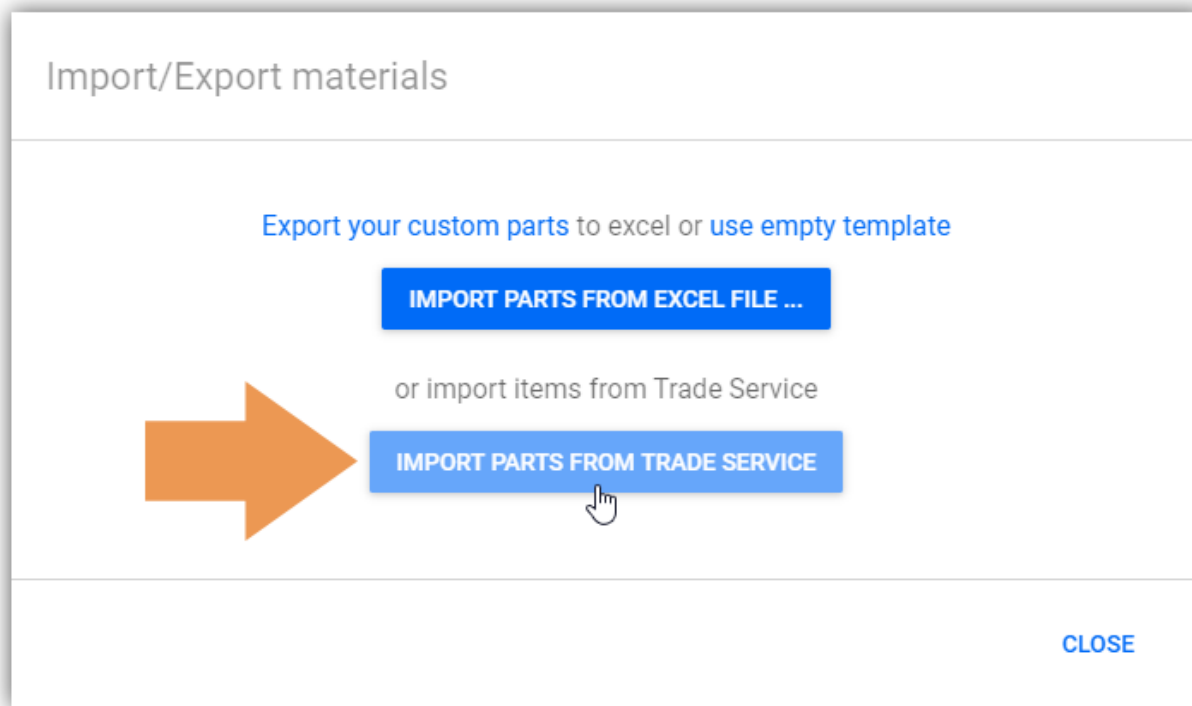
1. Click the **Account Menu** and select **Material Catalogs**.
 - a. The **Material Catalogs** window will appear.



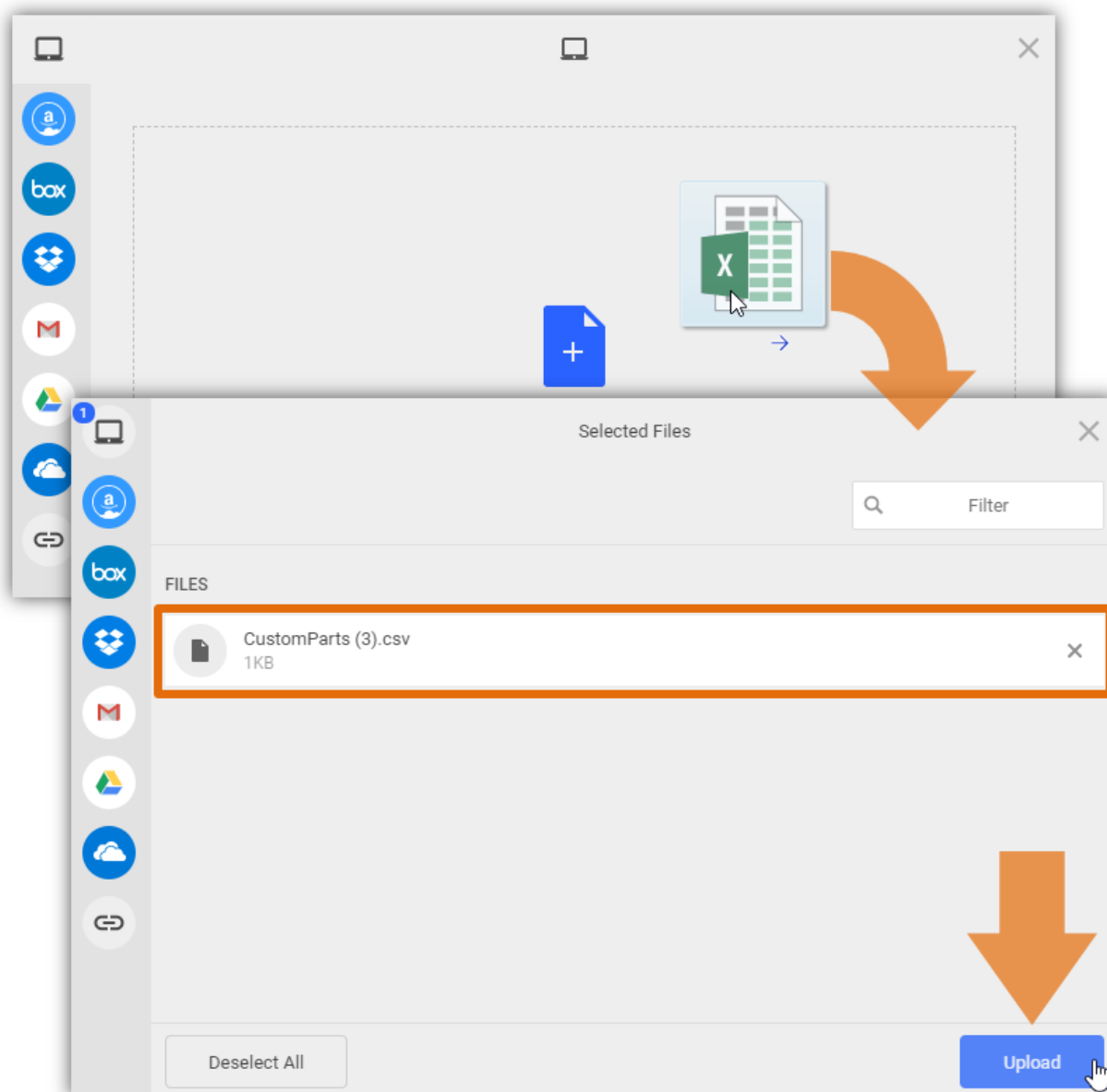
2. Click the **IMPORT/EXPORT PARTS** link.
 - a. The **Import/Export materials** window opens.



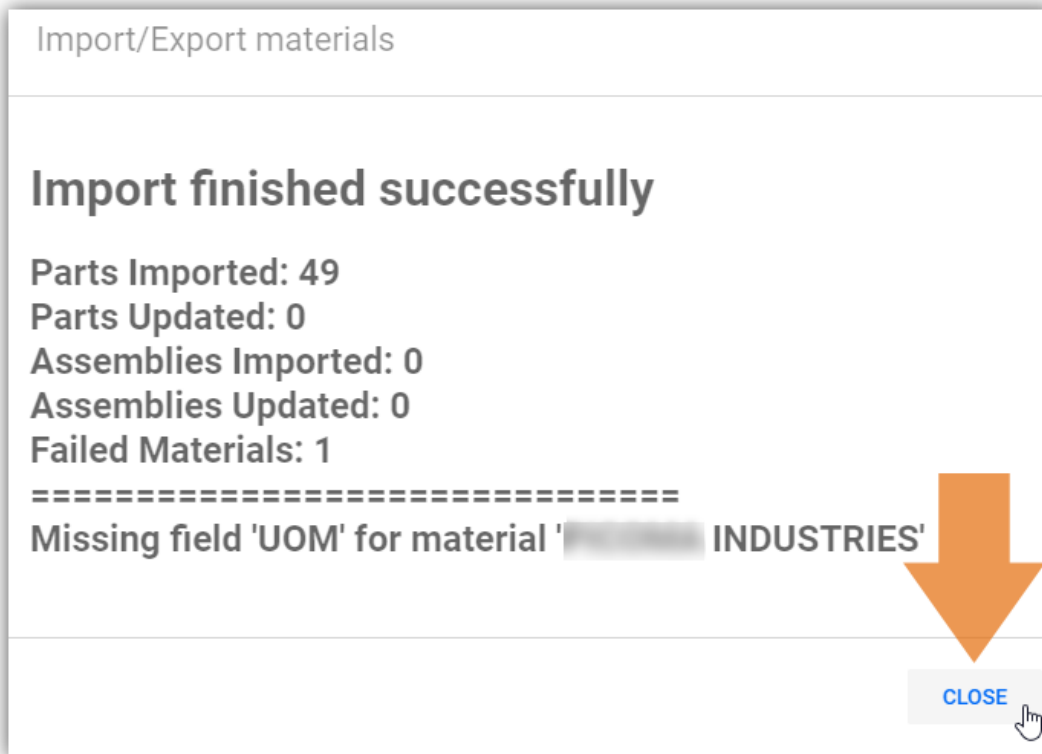
3. Click the **IMPORT PARTS FROM TRADE SERVICE** button.
 - a. The **Select Files to Upload** window will appear.



4. In this window, you can use different options to upload the files, namely:
 - a. My Device
 - b. Cloud Drive
 - c. Box
 - d. Dropbox
 - e. Gmail
 - f. Google Drive
 - g. OneDrive
 - h. Link (URL)
 - i. **Note:** some of the options require you to connect Esticom to these third-party platforms (e.g. Box, Dropbox, Gmail, etc.)
5. In this example, we used the **My Device** option to import new materials.
6. To upload files with ease, simply **Drag** the file from the source folder and **Drop** it in the **Select Files to Upload** window.
 - a. **Note:** you can also copy the appropriate file(s) and paste it in the **Select Files to Upload** window or click the **Plus (+)** icon to manually search the file.



7. After selecting the file, click the **Upload** button.
 - a. A **Confirmation** dialog box will appear indicating that the file(s) was successfully imported.
8. Click the **CLOSE** button to close the dialog box.

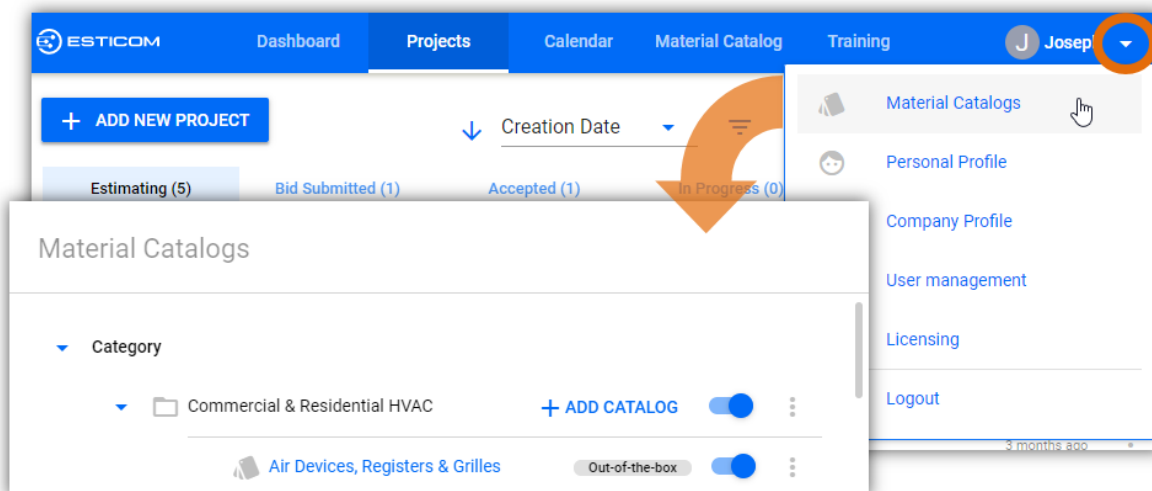


Adding Materials

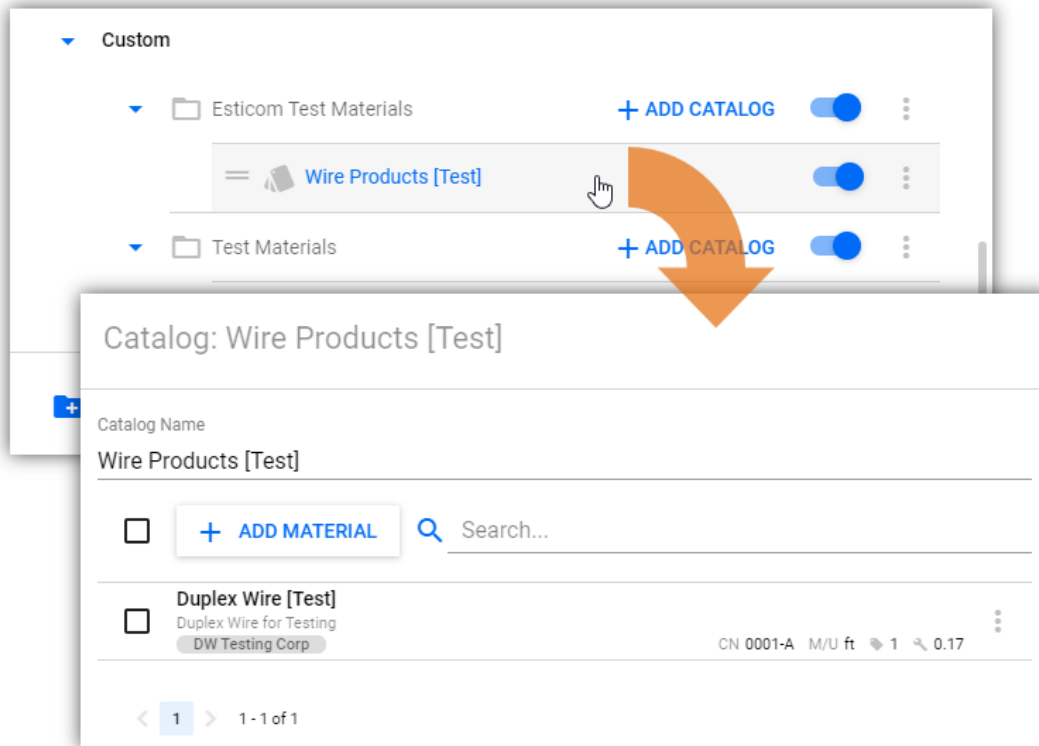
Adding Parts Using the Material Catalogs (Account Menu)

In this section, you will learn how to add parts using the Material Catalogs. This method varies from the Material Catalog module since it lets you add the materials to the selected group.

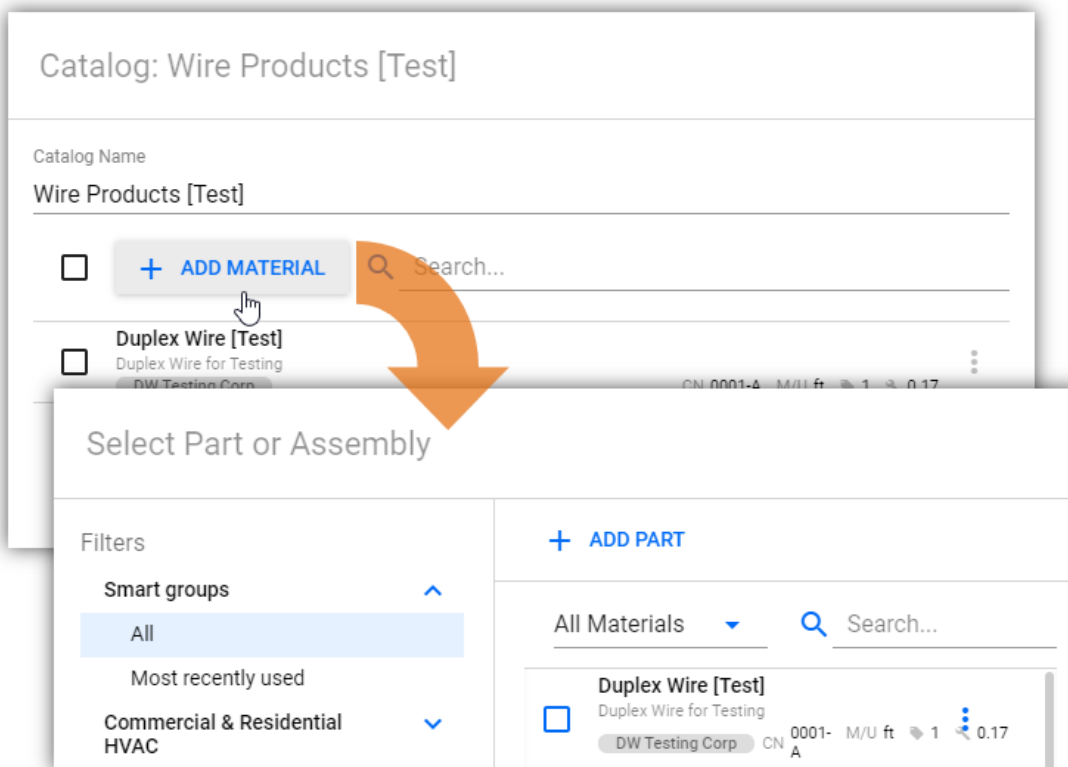
1. Click the **Account Menu** and select **Material Catalogs**.
 - a. The **Material Catalogs** window will appear.



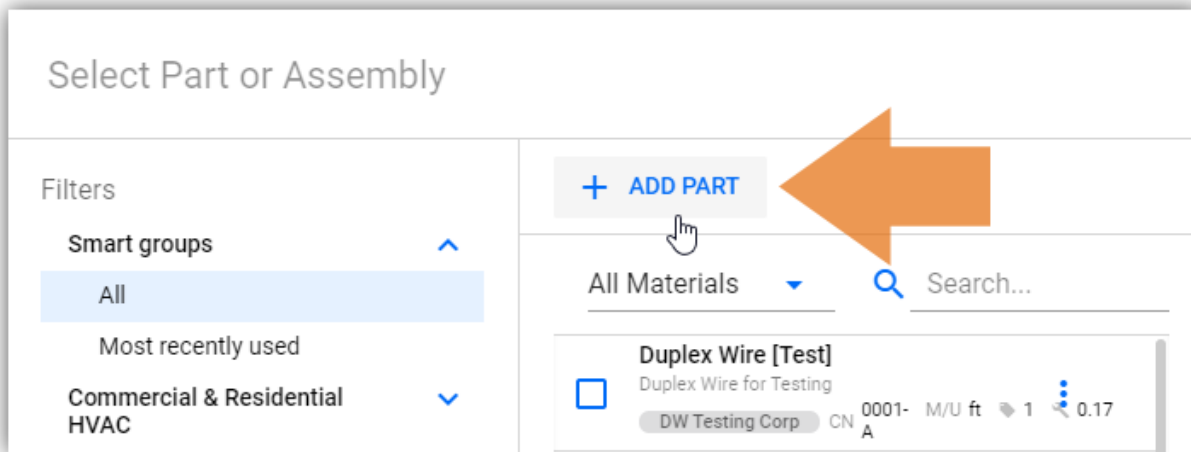
2. Scroll down to the **Custom** folder and find the group where you want to add the materials to.
3. Click the group to open the **Catalog <Catalog Name>** window.



4. Find and click the **+ ADD MATERIAL** button.
 - a. The **Select Part or Assembly** window opens.



5. By default, the materials will be added in the **All** category. To organize your materials, ensure to select the appropriate folder. In the **Filters** panel on the left, find and click the group where you want to add the materials to.
6. Click the **+ ADD PART** link.
 - a. The **Create Part or Assembly** window opens.



Select Part or Assembly

Filters

Smart groups

All

Most recently used

Commercial & Residential HVAC

+ ADD PART

All Materials

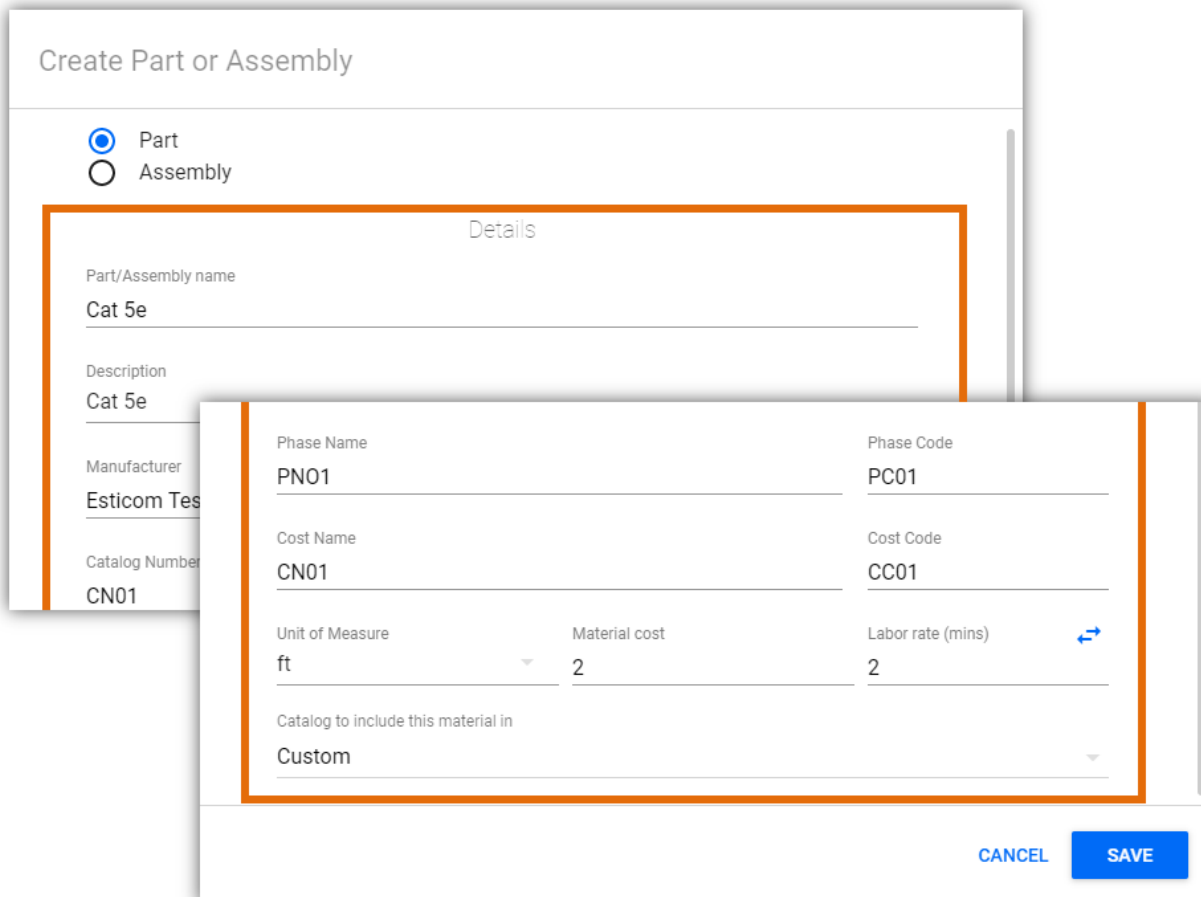
Search...

Duplex Wire [Test]

Duplex Wire for Testing

DW Testing Corp CN 0001- M/U ft 1 0.17

7. By default, the **Part** radio button is selected. Ensure that this option is selected. Specify the part details:



Create Part or Assembly

☒ Part

☐ Assembly

Details

Part/Assembly name

Cat 5e

Description

Cat 5e

Manufacturer

Esticom Tes

Catalog Number

CN01

Phase Name

PN01

Phase Code

PC01

Cost Name

CN01

Cost Code

CC01

Unit of Measure

ft

Material cost

2

Labor rate (mins)

2

Catalog to include this material in

Custom

CANCEL

SAVE

Field	Instructions
Part/Assembly Name	Enter the part or material name.
Description	Enter the part or material description.
Manufacturer	Enter the Manufacturer Name if necessary.
Catalog Number	Enter the part's catalog number.
Phase Code	Enter the part's phase code.
Cost Code	Enter the part's cost code.
Unit of Measure	Click the drop-down arrow to select the part's appropriate unit of measurement.
Material Cost	Enter the part/material cost.
Labor rate (mins)	Enter the part/material installation labor rate in minutes or toggle it into hours by clicking the Toggle icon.
Catalog to include this material in	Click the drop-down arrow to select a catalog where you want this material to be included. Note: add this material to a new catalog by clicking the New Catalog link.

8. Review the specified details and click **SAVE** to create the part.

Cost Name: CN01

Cost Code: CC01

Unit of Measure: ft

Material cost: 2

Labor rate (mins): 2

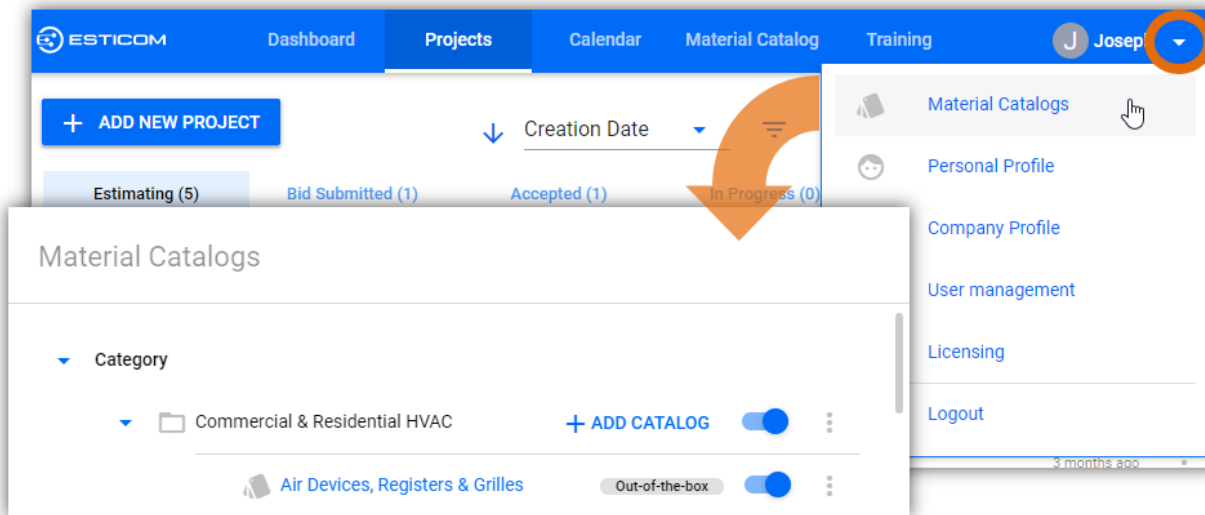
Catalog to include this material in: Custom

CANCEL SAVE

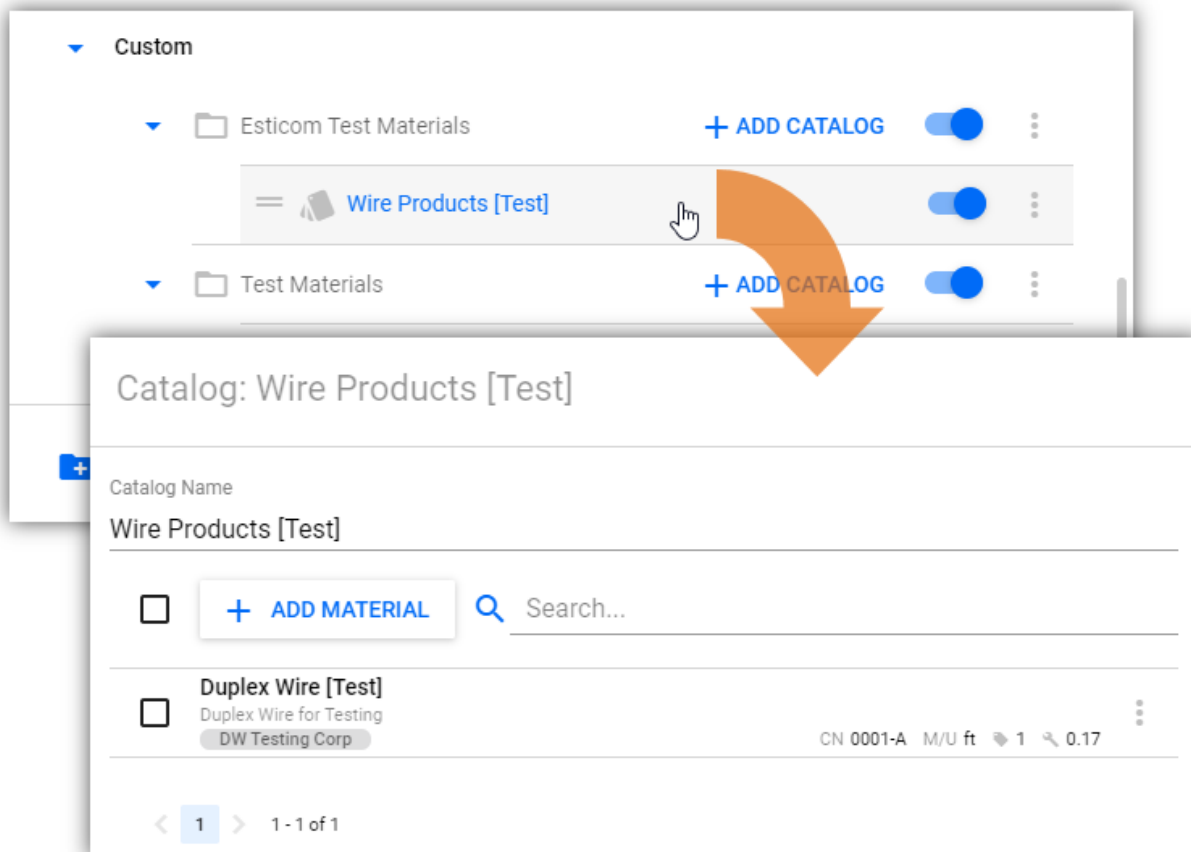
Create Assemblies Using the Material Catalogs (Account Menu)

In this section, you will learn how to create assemblies using the Material Catalogs. This method varies from the Material Catalog module since it lets you add the assemblies to the selected group.

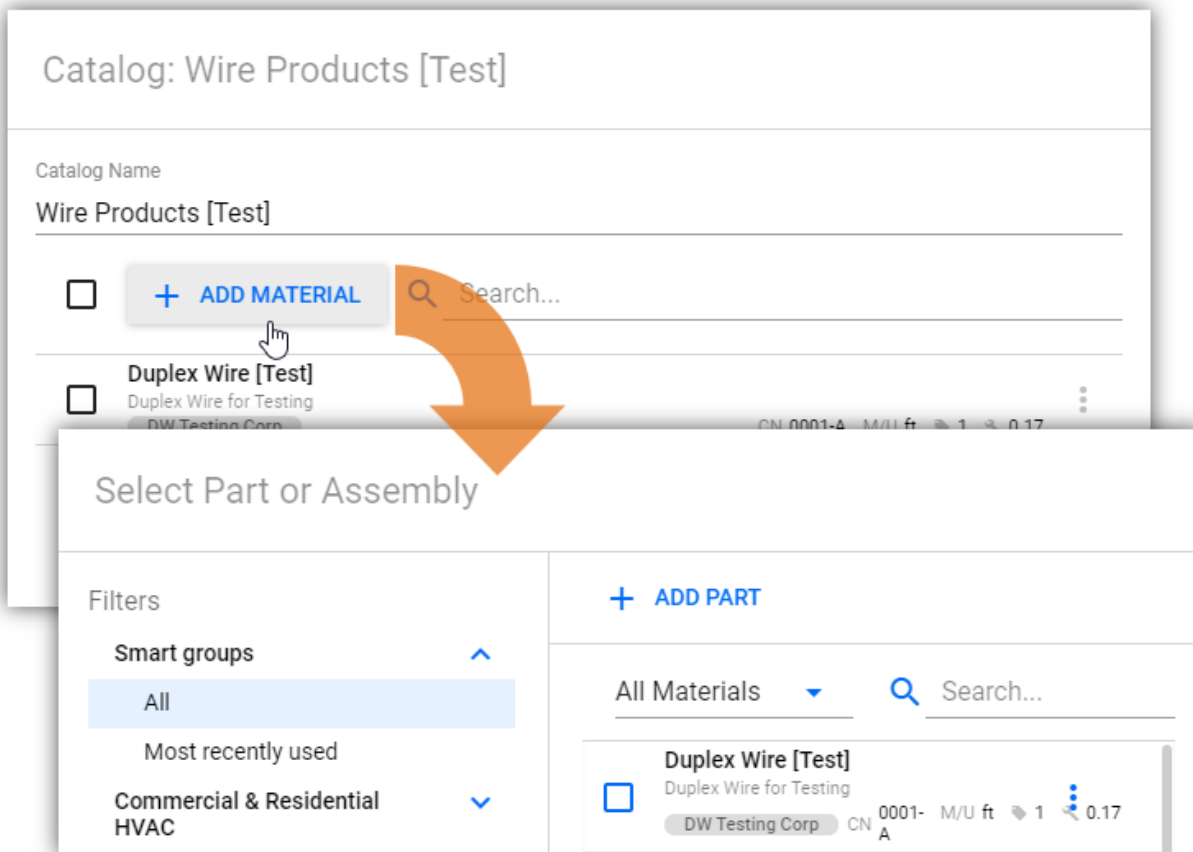
1. Click the **Account Menu** and select **Material Catalogs**
 - a. The **Material Catalogs** window will appear.



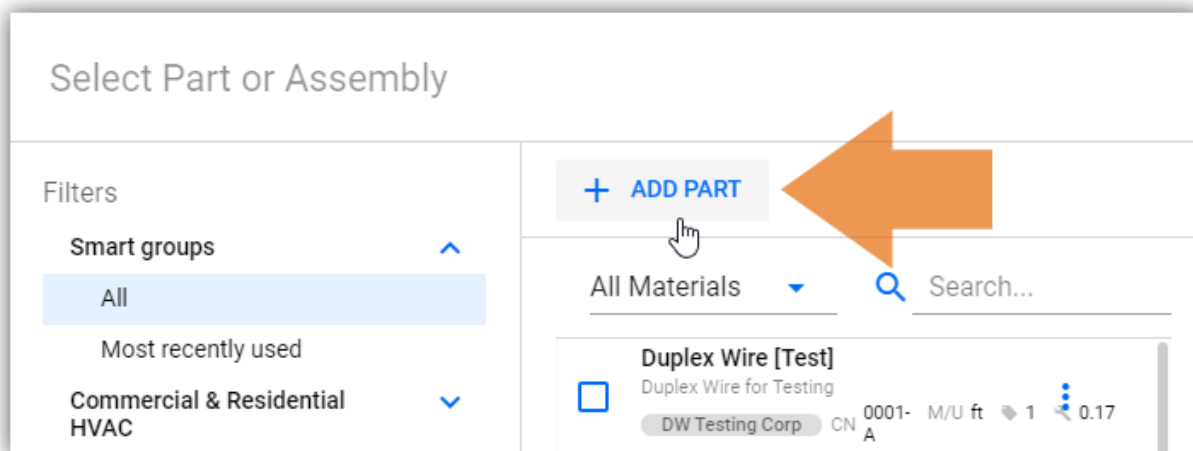
2. Scroll down to the **Custom** folder and find the group where you want to add the assembly to.



3. Click the group to open the **Catalog <Catalog Name>** window.
4. Find and click the **+ ADD MATERIAL** button.
 - a. The **Select Part or Assembly** window opens.



5. By default, the materials will be added in the **All** category. To organize your materials, ensure to select the appropriate folder. In the **Filters** panel on the left, find and click the group where you want to add the materials to.
6. Click the **+ ADD PART** link.
 - a. The **Create Part or Assembly** window opens.



7. Select the **Assembly** radio button. Start assembling the parts by searching and selecting individual part names. Use the **Search...** field or click the **BROWSE PARTS CATALOG** button. In this example, we clicked the **BROWSE PARTS CATALOG** button.

Create Part or Assembly

☐ Part
 ☒ Assembly

Parts included (0)

No parts included yet. Use search or browse catalog for finding the parts.

8. To maximize your search, use the **Filters** panel by selecting the appropriate **Trade** and **Parts Category**.

Create Part or Assembly

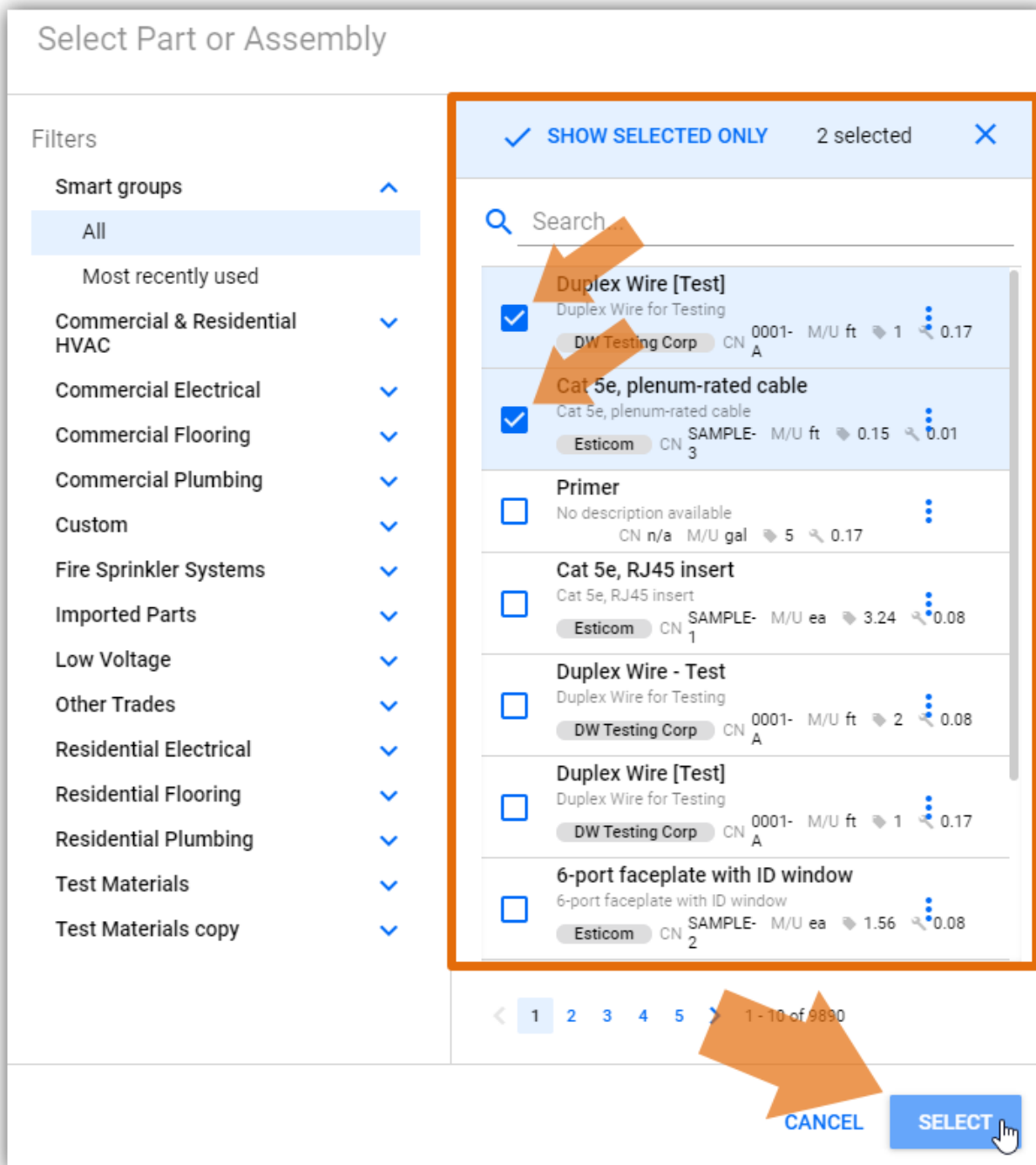
☐ Part
 ☒ Assembly

Parts included (0)

No parts included yet. Use search or browse catalog for finding the parts.

Details

9. In the **Parts List** panel on the right, click the **Plus (+)** icon to start adding the parts.
- a. **Note:** to remove selected parts, click the **X** icon.



10. After selecting the parts, click **SELECT**.

11. Specify the number of materials by clicking the field beside the Part name and enter the appropriate value.

Create Part or Assembly

☐ Part
 ☒ Assembly

Parts included (2)

1	Cat 5e, plenum-rated cable Cat 5e, plenum-rated cable Esticom	CN SAMPLE-3 M/U ft 0.15 0.01	X
1	Duplex Wire [Test] Duplex Wire for Testing DW Testing Corp	CN 0001-A M/U ft 1 0.17	X

Details

12. Specify the **Assemble Details**:

Create Part or Assembly

☐ Part
 ☒ Assembly

Part/Assembly name

Test Cat 5e, plenum-rated cable

Description

Test Cat 5e,

Manufacturer

Catalog Number

TC02

Phase Name

PC02

Phase Code

PC02

Cost Name

CN01

Cost Code

CC02

Unit of Measure

ft

Material cost

1.15

Calculated from parts

Labor rate (mins)

10.45

Calculated from parts

Catalog to include this material in

Custom

CANCEL

SAVE

Field	Instructions
Part/Assembly Name	Enter the assembly name.
Description	Enter the assembly description.
Manufacturer	Enter the Manufacturer Name if necessary.
Catalog Number	Enter the assembly's catalog number.
Phase Code	Enter the assembly's phase code.
Cost Code	Enter the assembly's cost code.
Unit of Measure	Click the drop-down arrow to select the assembly's appropriate unit of measurement.
Material Cost	By default, this field displays a calculated value from selected parts.
Labor rate (mins)	By default, this field displays a calculated value from selected parts.
Catalog to include this material in	Click the drop-down arrow to select a catalog where you want this assembly/material to be included in. Note: add this material to a new catalog by clicking the New Catalog link.

13. Review the specified details and click **SAVE** to create the assembly.

The screenshot shows a form with the following fields and values:

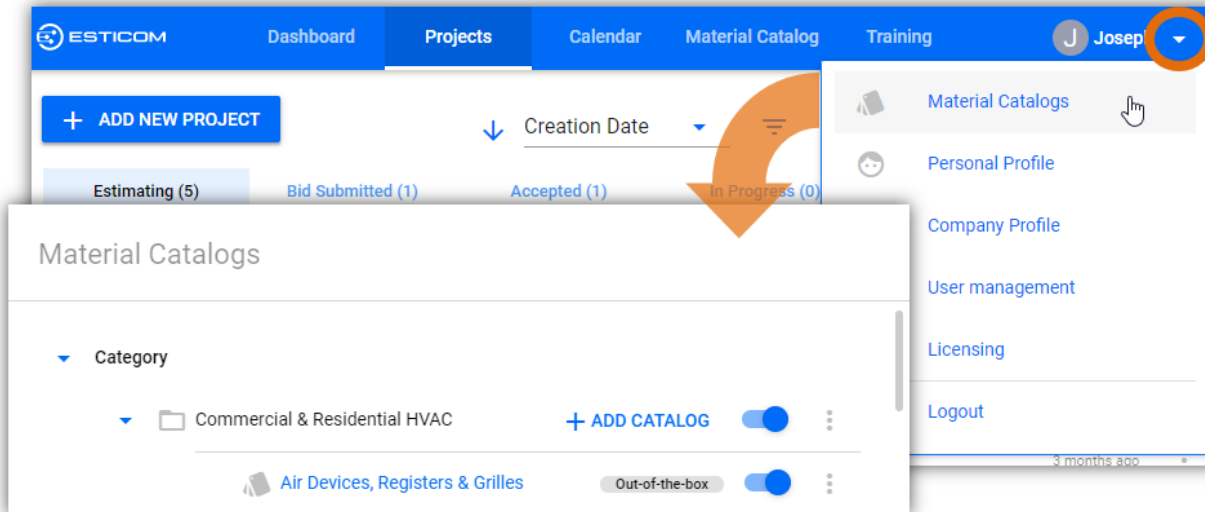
- Unit of Measure:** A dropdown menu showing "ft".
- Material cost:** A text field showing "1.15" with a blue underline and the text "Calculated from parts" below it.
- Labor rate (mins):** A text field showing "10.45" with a blue underline and the text "Calculated from parts" below it.
- Catalog to include this material in:** A dropdown menu showing "Custom".

At the bottom right, there are two buttons: "CANCEL" and "SAVE". A large orange arrow points down towards the "SAVE" button, which has a hand cursor icon over it.

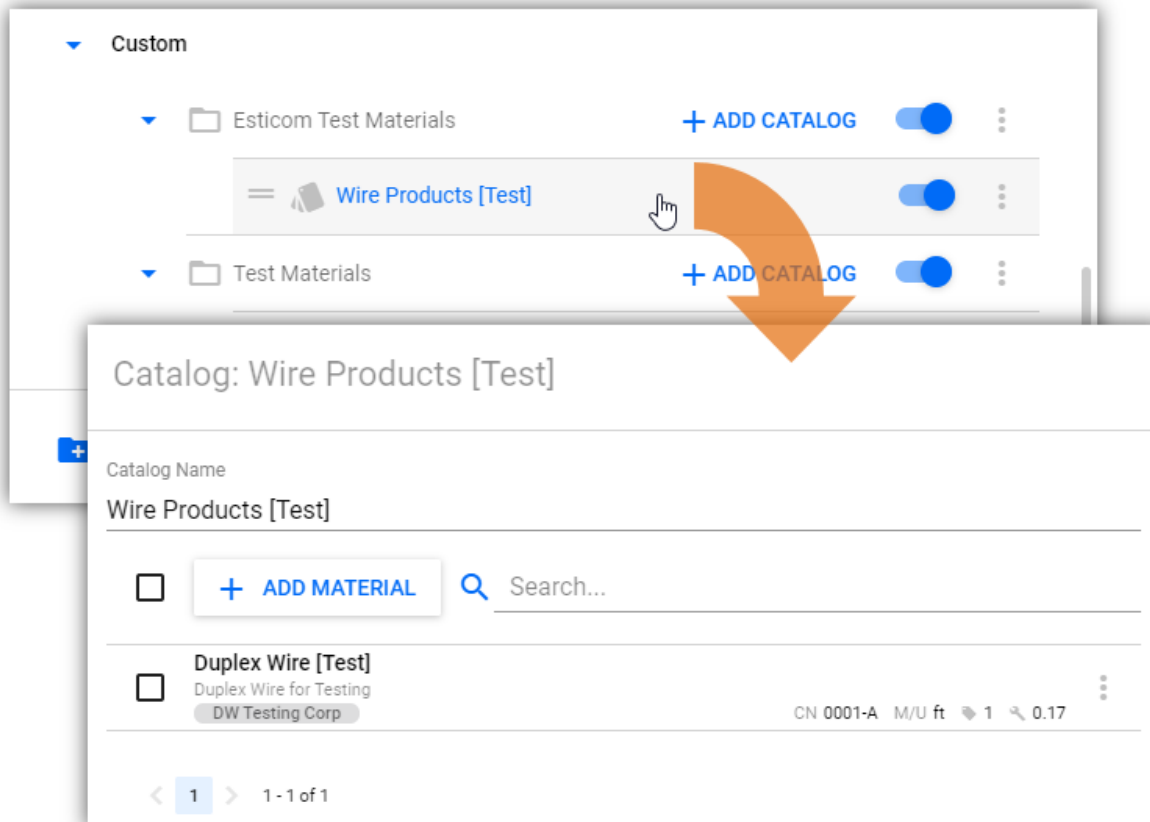
Edit Materials

In this section, you will learn how to edit/update materials through the Material Catalogs (Account Menu). It is worth noting that out-of-the-box materials can't be updated/edited. If you edit out-of-the-box materials, it will be saved as separate and new material. On the other hand, you can update custom materials without restrictions.

1. Click the **Account Menu** and select **Material Catalogs**.
 - a. The **Material Catalogs** window will appear.



2. Find the group where the material is saved.
3. Click the group to open the **Catalog <Catalog Name>** window.



- Find the material that you want to edit and click the **More Options** button.

Catalog: Wire Products [Test]

Catalog Name
Wire Products [Test]

☐ + ADD MATERIAL

☐ **Duplex Wire [Test]**
Duplex Wire for Testing
DW Testing Corp

CN 0001-A M/U ft 1 0.17

EDIT
DUPLICATE
USE IN ASSEMBLY
DELETE

- Select **EDIT** to update the selected material.
- Update the necessary information.

Edit Part or Assembly

☒ Part
☐ Assembly

Details

Part/Assembly name
Duplex Wire [Test]

Description
Duplex

Manufact
DW Tes

Catalog N
0001-A

Phase Name
Phase Code
PC001A

Cost Name
Cost Code
CC001

Unit of Measure
ft

Material cost
1

Labor rate (mins)
10

Catalog to include this material in
Custom

CANCEL SAVE

- Review the changes and click **SAVE** to save the updated information.

Cost Name _____ Cost Code **CC001**

Unit of Measure **ft** Material cost **1** Labor rate (mins) **10**

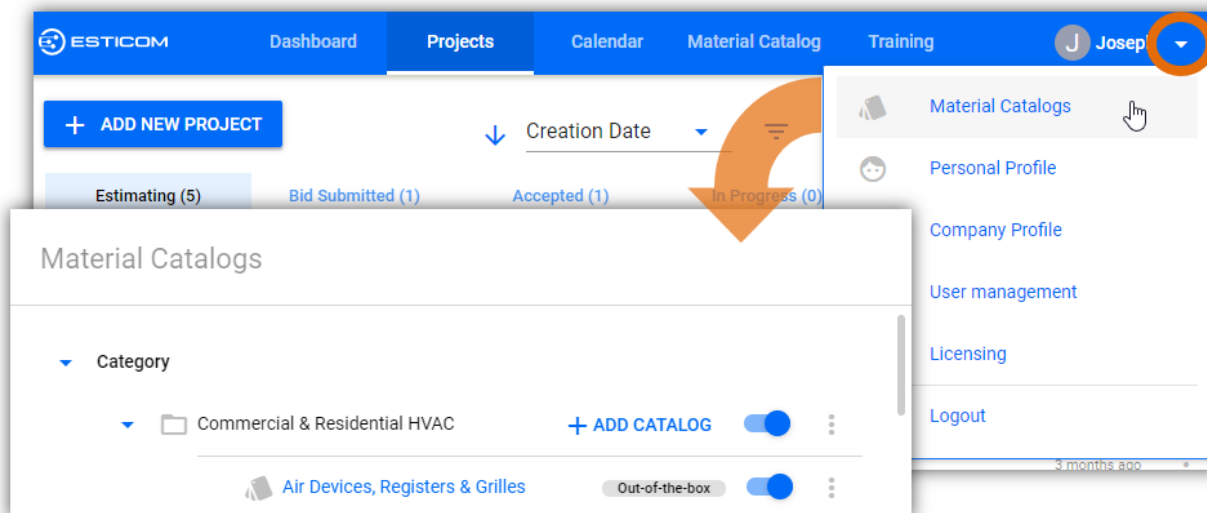
Catalog to include this material in **Custom**

CANCEL **SAVE**

Duplicate Materials

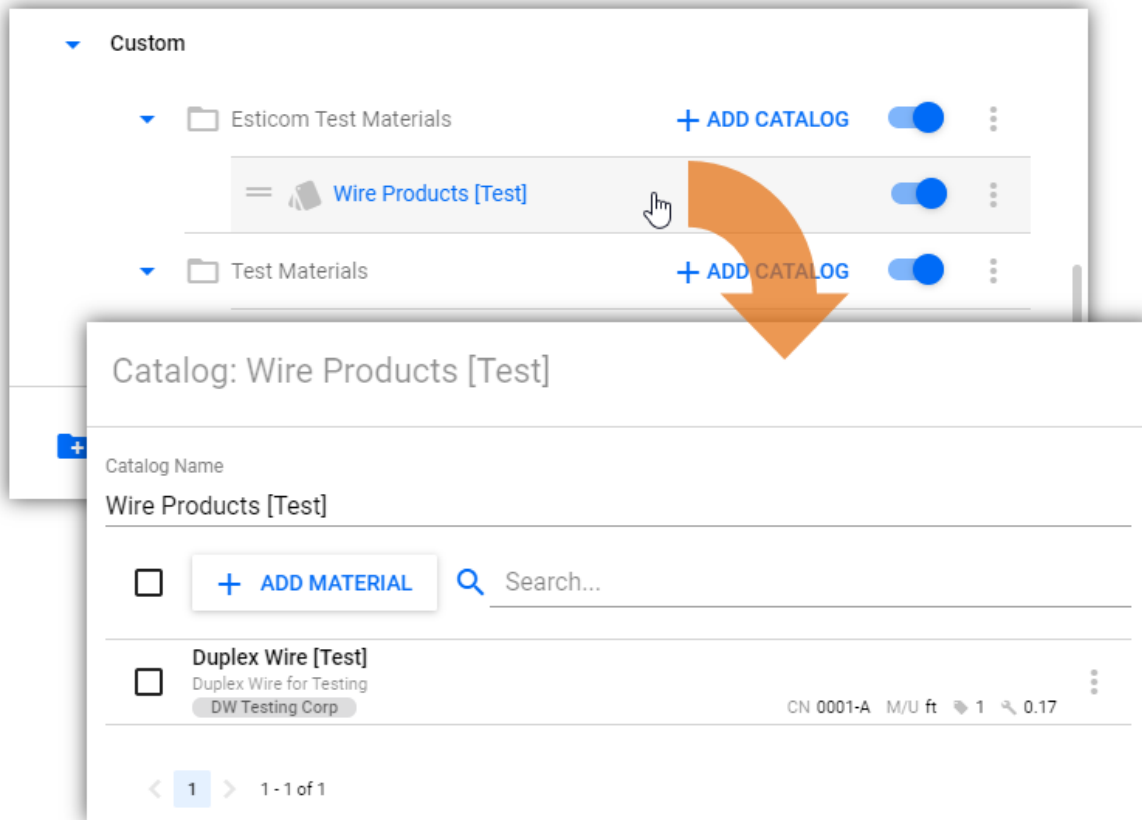
In this section, you will learn how to duplicate parts/assemblies using the Material Catalogs (Account Menu). The duplicate option enables you to create copies of existing materials. Duplicated materials will have indicators of being duplicates/copies.

- Click the **Account Menu** and select **Material Catalogs**.
 - The **Material Catalogs** window will appear.

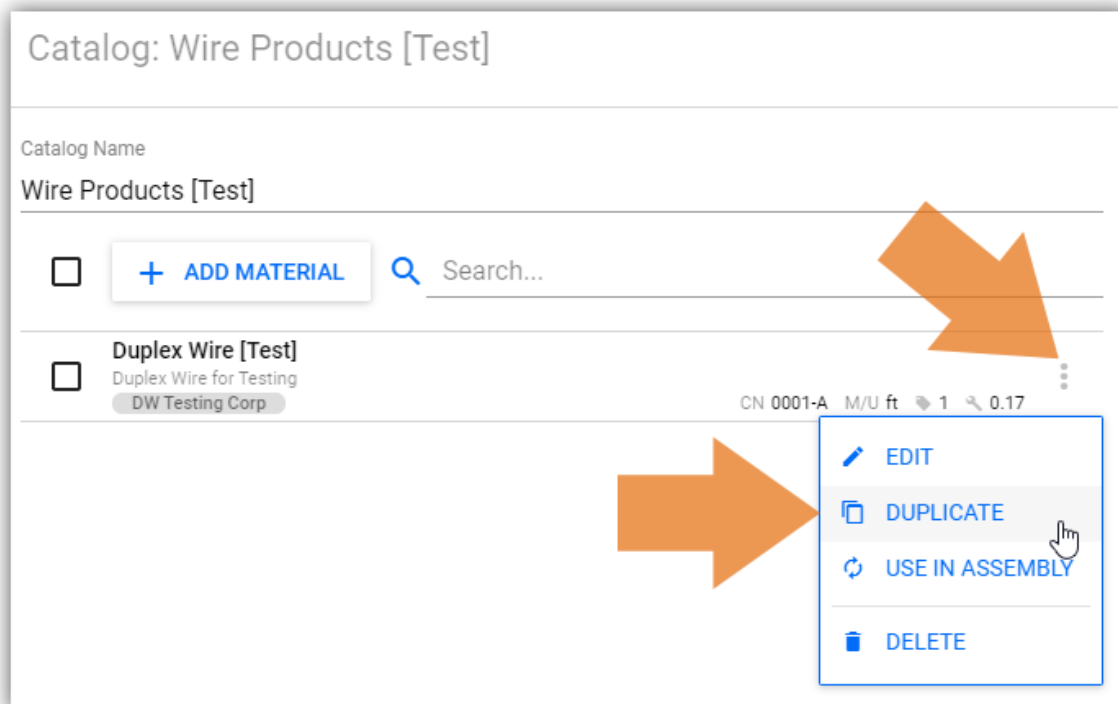


- Find the group where the material is saved.

- Click the group to open the **Catalog <Catalog Name>** window.



- Find the material that you want to duplicate and click the **More Options** button.



- Select **DUPLICATE** to make a copy of the selected material.

- The **Duplicate Part** or **Assembly** window will appear. Review the material information and edit the value of each field if necessary.

Duplicate Part or Assembly

☒ Part
☐ Assembly

Details

Part/Assembly name
Duplex Wire [Test]

Description
Duplex

Manufact
DW Tes

Catalog N
0001-A

Phase Name
Phase Code
PC001A

Cost Name
Cost Code
CC001

Unit of Measure
ft

Material cost
1

Labor rate (mins)
10

Catalog to include this material in
Custom

CANCEL SAVE

- Click **SAVE** to create a duplicate material.
-

Cost Name
Cost Code
CC001

Unit of Measure
ft

Material cost
1

Labor rate (mins)
10

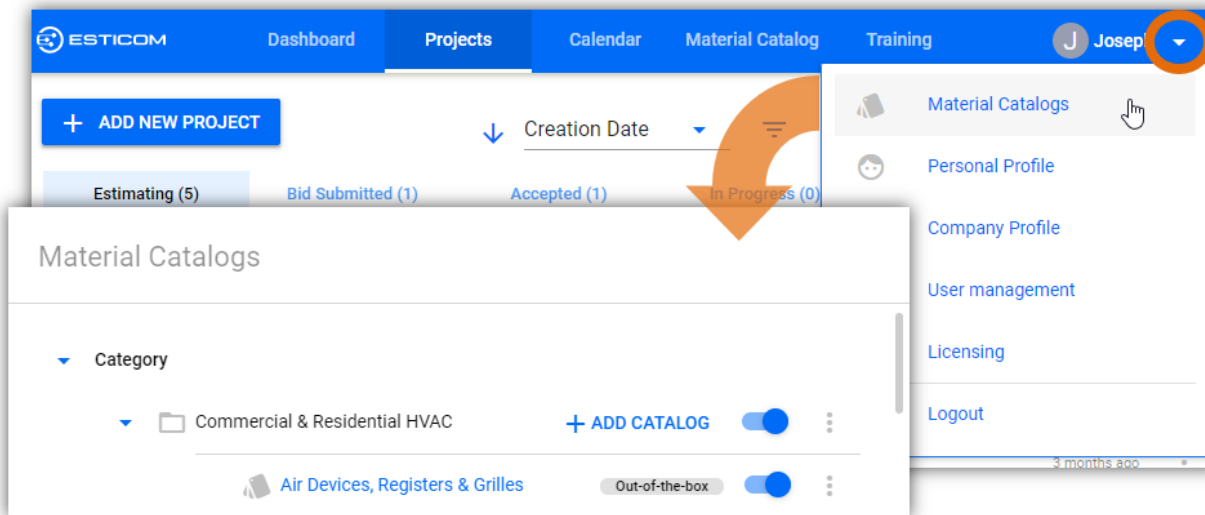
Catalog to include this material in
Custom

CANCEL SAVE

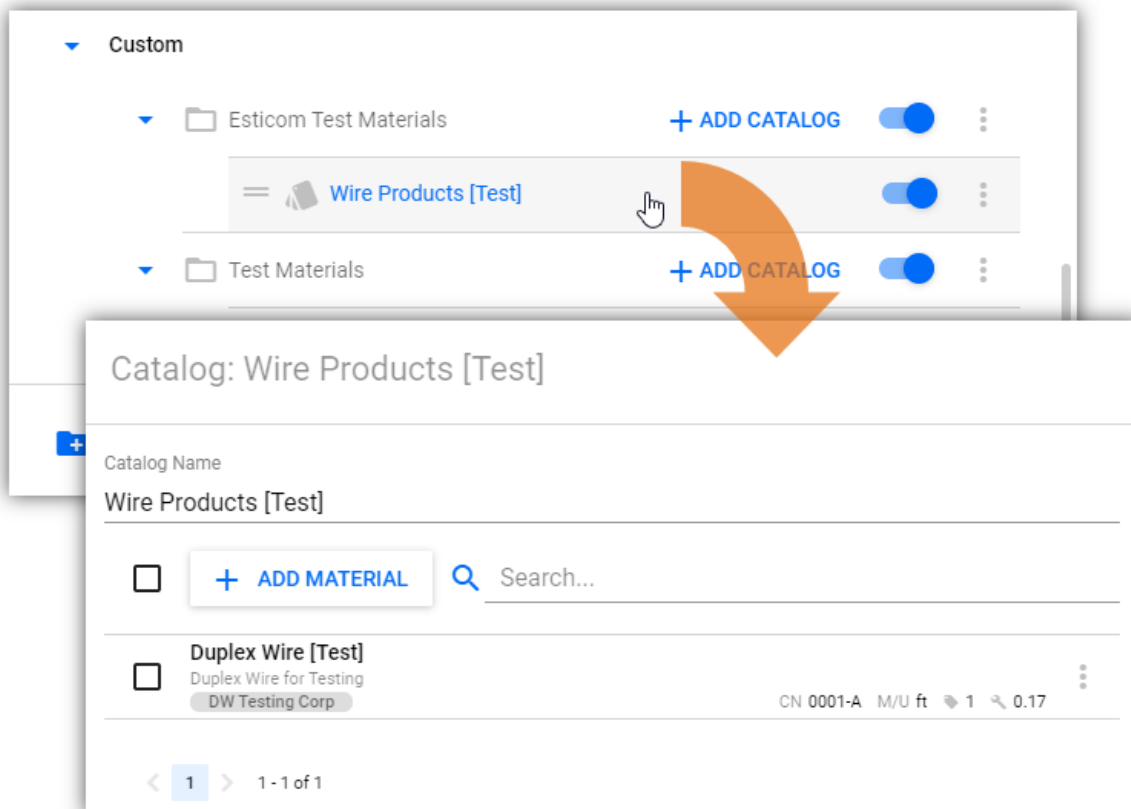
Use Materials in Assembly

In this section, you will learn how to use parts to create an assembly through the Material Catalogs (Account Menu). This option lets you select multiple materials and specify its details to create an assembly.

1. Click the **Account Menu** and select **Material Catalogs**.
 - a. The **Material Catalogs** window will appear.



2. Scroll down to the **Custom** folder and find the group where the material is saved.
3. Click the group to open the **Catalog <Catalog Name>** window.



4. Find the material that you want to use in an assembly and click the **More Options** button.
5. Select **USE IN ASSEMBLY** to use the selected material in an assembly.
 - a. The **Create Part or Assembly** window will appear.

Catalog: Wire Products [Test]

Catalog Name
Wire Products [Test]

☐ + ADD MATERIAL

☐ Duplex Wire [Test]
Duplex Wire for Testing
DW Testing Corp

CN 0001-A M/U ft 1 0.17

- EDIT
- DUPLICATE
- USE IN ASSEMBLY
- DELETE

6. In this window, the selected part is added automatically. You can add more parts by manually selecting them. First, you need to find them using the **Search...** bar or the **BROWSE PARTS CATALOG** button. (See **Create Assemblies** for more info).
7. Specify the **Assembly** Details:

Create Part or Assembly

☐ Part
☒ Assembly

Parts included (1)

1 Duplex Wire
Duplex Wire for Testing
DW Testing Corp

Part/Assembly name
Test Assembly

Description
Test Assembly

Manufacturer
Esticom Test Products

Catalog Number
CN03

Phase Name
PN03

Phase Code
PC03

Cost Name
CN03

Cost Code
CC03

Unit of Measure
ea

Material cost
1

Labor rate (mins)
10

Catalog to include this material in
Custom

CANCEL SAVE

Field	Instructions
Part/Assembly Name	Enter the assembly name.
Description	Enter the assembly description.
Manufacturer	Enter the Manufacturer Name if necessary.
Catalog Number	Enter the assembly's catalog number.
Phase Code	Enter the assembly's phase code.
Cost Code	Enter the assembly's cost code.
Unit of Measure	Click the drop-down arrow to select the assembly's appropriate unit of measurement.
Material Cost	By default, this field displays a calculated value from selected parts.
Labor rate (mins)	By default, this field displays a calculated value from selected parts.
Catalog to include this material in	Click the drop-down arrow to select a catalog where you want this assembly/material to be included in. Note: add this material to a new catalog by clicking the New Catalog link.

8. Review the specified details and click **SAVE** to create the assembly.

Unit of Measure: ea

Material cost: 1
Calculated from parts

Labor rate (mins): 10
Calculated from parts

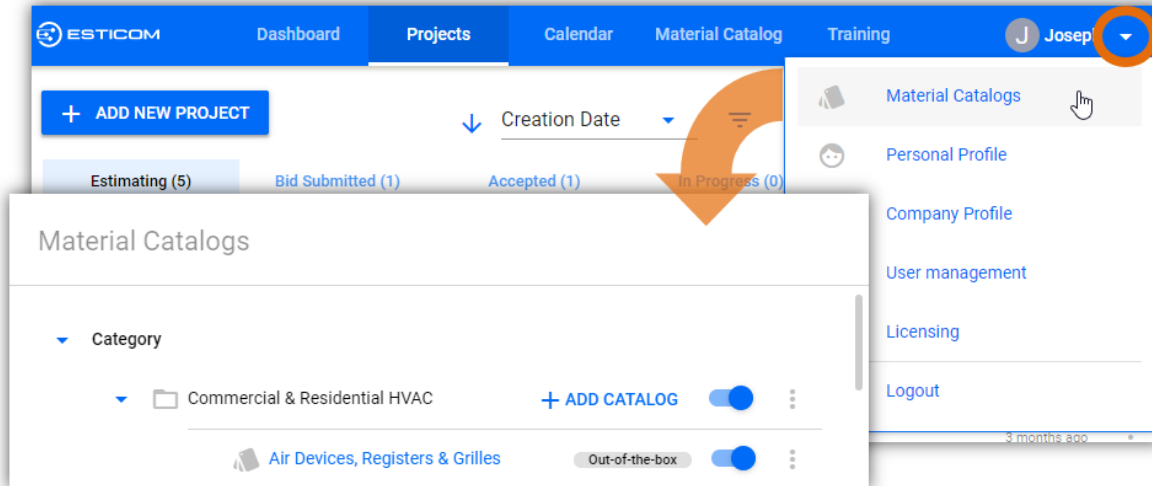
Catalog to include this material in: Custom

CANCEL SAVE

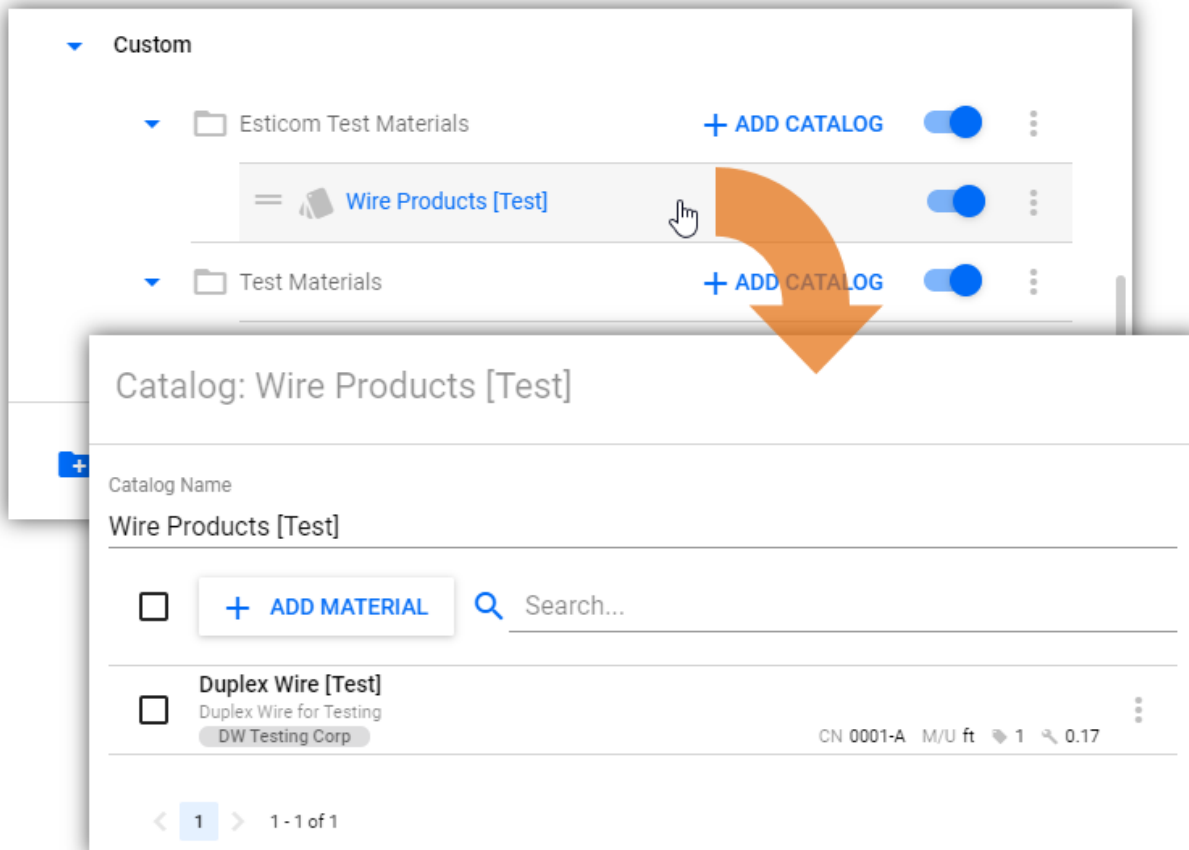
Delete Materials

In this section, you will learn how to delete materials using the Account menu's Materials Catalog.

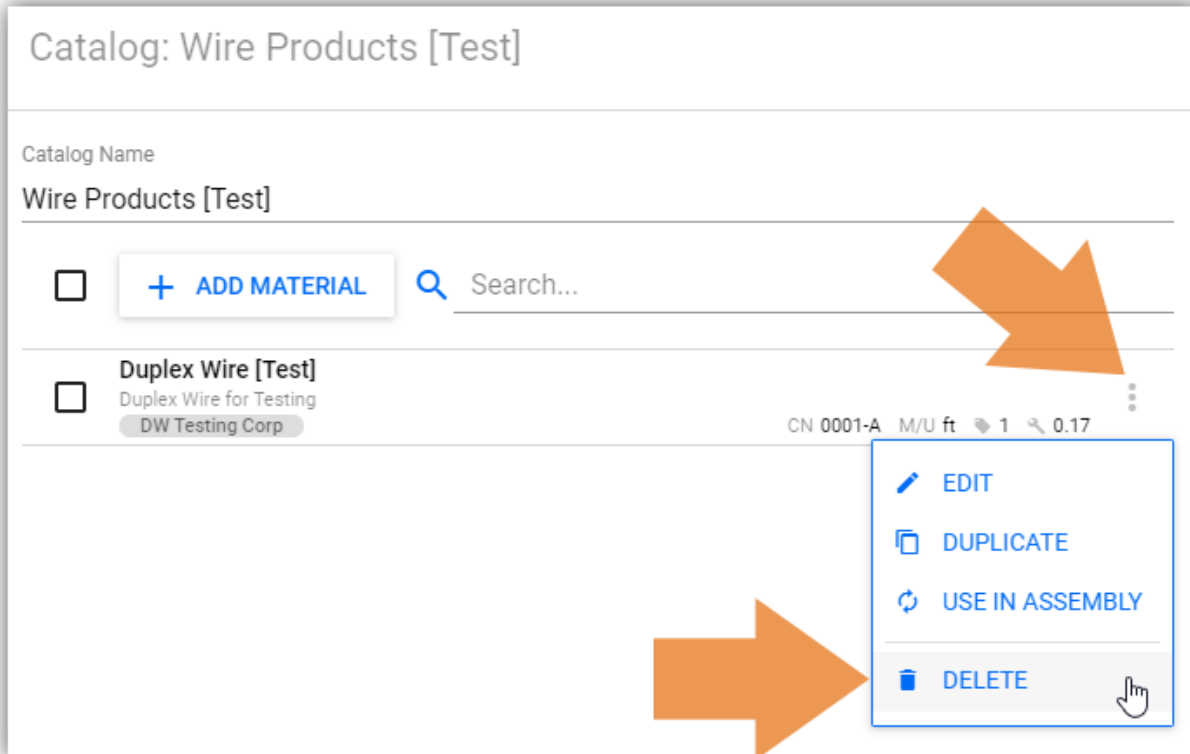
1. Click the **Account Menu** and select **Material Catalogs**.
 - a. The **Material Catalogs** window will appear.



2. Scroll down to the **Custom** folder and find the group where the material is saved.
3. Click the group to open the **Catalog <Catalog Name>** window.



4. Find the material that you want to delete and click the **More Options** button.



5. Select **DELETE** to delete the selected material.
 - a. A **Confirmation** dialog box will appear.
6. Click **DELETE** to continue deleting the selected material.

