

Materials Management Guide



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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
- <u>Create Assemblies</u>
- Edit Parts/Assemblies Details
- Duplicate Parts/Assemblies
- Delete Parts/Assemblies
- <u>Access the Manage Catalogs Link</u>

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.

	Dashboard	Projects	Calendar	Material Catalog	Training	
Filters		+ ADD PA	RT	Ð		
Smart groups	^					
All		All Materia	als	▼ Q Search		
Most recently used		Duplex Wire [Test]			
Commercial & Resident	ial 🗸	Duplex Wire for T DW Testing Co	-			
Commercial Electrical	~	Cat 5e, plenum-rated cable Cat 5e, plenum-rated cable Esticom				
Commercial Flooring	~	Primer				

2. Click the **+ ADD PART** button.

a. The Create Part or Assembly window opens.

ESTICOM	Dashboard	Projects	Calendar	Material Catalog	Training
Filters Smart groups	^	+ ADD PAR			rch
All					
comm Create	Part or Assen	nbly			
Comm Comm	Part Assembly		Details		
Part/	Assembly name				
Desc	ription				

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

PartAssembly			
	[Details	
Part/Assembly name			
Cat 5e			
Description			
Cat 5e			
	Phase Name		Phase Code
Manufacturer	PN01		PC01
Esticom Tes			
Catalog Number	Cost Name		Cost Code
CN01	CN01		CC01
	Unit of Measure	Material cost	Labor rate (mins)
	ft	2	2
	Ontale da includa this mate		
	Catalog to include this mate	inal in	
	Custom		·

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	Click the drop-down arrow to select a catalog where you want this		
material in	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.

CN01			CC01
Unit of Measure		Material cost	Labor rate (mins) 🔶
ft	~	2	2
Catalog to include this m	aterial in		
Custom			

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.

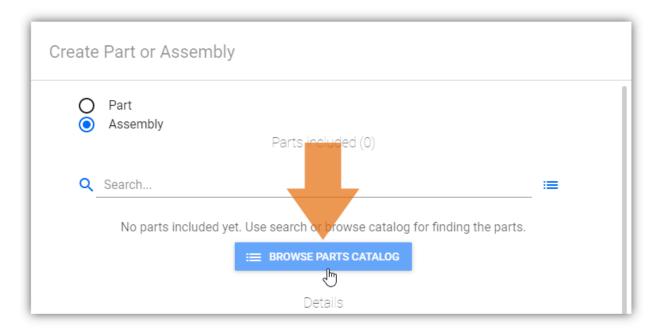
1. On the Module Menu, click Material Catalog.

ESTICOM	Dashboard	Projects	Calendar	Material Catalog	Training	
Filters		+ ADD PAF	श	, m		
Smart groups	^					
All		All Materials		▼ Q Search		
Most recently used		Duplex Wire [1	est]			
Commercial & Residentia	ı 🗸	Duplex Wire for Te DW Testing Cor	2			
Commercial Electrical	~	Cat 5e, plenum Cat 5e, plenum-rat				
Commercial Flooring	~	Esticom Primer				

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

	M Dashboard	Projects Calenda	ar Material Catalog Training
Filters Smart grou All	ıps 🔨	+ ADD PART	• Q Search
Most Commer HVAC	Create Part or Asse	embly	
Commen Commen	Part Assembly	Parts include	ed (0) : ■
	No parts incl	uded yet. Use search or brow	vse catalog for finding the parts.

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. <u>Note</u>: to remove selected parts, click the X icon.

Select Part or Assem	nbly	
Filters		SHOW SELECTED ONLY 2 selected X
Smart groups	^	
All		Q Search
Most recently used		Duplex Wire [Test]
Commercial & Residential HVAC	~	Duplex Wire for Testing DW Testing Corp CN A 0001- M/U ft > 1 < 0.17
Commercial Electrical	~	Cat 5e, plenum-rated cable
Commercial Flooring	~	Esticom CN 3
Commercial Plumbing	~	Primer
Custom	~	No description available CN n/a M/U gal
Fire Sprinkler Systems	~	Cat 5e, RJ45 insert
Imported Parts	~	Cat 5e, RJ45 insert Esticom CN SAMPLE- M/U ea > 3.24 1
Low Voltage	~	Duplex Wire - Test
Other Trades	~	Duplex Wire for Testing DW Testing Corp CN A 0001- M/U ft > 2 < 0.08
Residential Electrical	~	
Residential Flooring	~	Duplex Wire [Test] Duplex Wire for Testing
Residential Plumbing	~	DW Testing Corp CN A 0001- M/U ft N 1 C 0.17
Test Materials	~	6-port faceplate with ID window
Test Materials copy	~	Esticom CN 2
		< 1 2 3 4 5 1 - 10 of 9890
		CANCEL SELECT

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

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

Create	Part or Assembly		
0	Part Assembly	Parts included (2)	
٩	Search		:=
1	Cat 5e, plenum-rated ca Cat 5e, plenum-rated cable Esticom	able CN SAMPLE-3 M/U ft 🔿 0.15 🔍 0.01	×
1	Duplex Wire [Test] Duplex Wire for Testing DW Testing Corp	CN 0001-A M/U ft 👒 1 🔍 0.17	×
		Details	

9. Specify the Assembly Details:

	D	etails			
Part/Assembly name					
Test Cat 5e, pler	num-rated cable			II	
Description					
Test Cat <u>5e</u> ,	Phase Name			Phase Code	
Manufacturer	PC02			PC02	
	Our et Name			0	
Catalog Number	Cost Name CN01			Cost Code CC02	
TC02					
1002	Unit of Measure				
	ft	Ψ	1.15	10.45	
			Calculated from parts	Calculated from parts	
	Catalog to include this	material ir	1		
	Custom				~

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	b include this Click the drop-down arrow to select a catalog where you want this		
material in	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.

Unit of Measure		Material cost		
ft	~	1.15	10.45	
		Calculated from parts	Calculated from parts	
Catalog to include this	s material ir	1		
Custom				-
			CANCEL	SAV

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.

ESTICOM	Dashboard	Projects	Calendar	Material Catalog	Training
ilters		+ ADD PA	RT	- J	
Smart groups	^				
All		All Materia	als	▼ Q Sear	ch
Most recently used		Duplex Wire [Test]		
Commercial & Residentia HVAC	I 🗸	Duplex Wire for T DW Testing Co	-		
Commercial Electrical	~	Cat 5e, plenum-ra	m-rated cable ated cable		
Commercial Flooring	~	Esticom			

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

	Dashboard	Projects Calendar Material Catalog Training	Joseph 🚽
Filters		+ ADD PART	
Smart groups	^		
All		All Materials	×
Most recently used		Duplex Wire [Test]	
Commercial & Residenti HVAC	al 🗸	Duplex Wire for Testing DW Testing Corp CN 0001-A M/U ft N 1 N 0.17	•
Commercial Electrical	~	Duplex Wire [Test] Duplex Wire for Testing DW Testing CN 0001-A M/U ft > 1 < 0.17	:
Commercial Flooring	~	Duplex Wire - Test	
Commercial Plumbing	~	Duplex Wire for Testing DW Testing CN 0001-A M/U ft > 2 < 0.08	:
Custom	~	Duplex Wire [Test]	
Fire Sprinkler Systems	~	Duplex Wire for Testing CN 0001-A M/U ft 1 3 0.17	:
Imported Parts	~	Duplex Receptacle, GFCI, 20 amp, Commercial-Grade with Box,	
Low Voltage	~	Conduit Stub-up and 3 #12 Includes conduit, one hole straps, connectors, couplings, wire nuts, 4° box, receptacle Assembly out-of-the-box CN n/a M/U ea 51.61 % 1.64	
Other Trades	~	Duplex Receptacle, 20 amp, Commercial-Grade with Box, Conduit	
Residential Electrical	~	Stub-up and 3 #12	
Residential Flooring	~	Includes conduit, one hole straps, connectors, couplings, wire nuts, 4° box, receptacle Assembly out-of-the-box CN n/a M/U ea > 16.23 < 1.69	-
Residential Plumbing	~		
Test Materials	~		

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

Projects	Calendar	Material Catalog	Training	📕 Joseph 👻
+ ADD I	PART			
All Mate	rials 🗸	Q Duplex	Wire	×
Duplex Wire Duplex Wire fo DW Testing	or Testing	_	CN 0001-A M/U	ft = 1 = 0.17
Duplex Wire Duplex Wire for DW Testing	or Testing		CN 0001-A M/U	EDIT DUPLICATE
Duplex Wire Duplex Wire for DW Testing	or Testing		CN 0001-A M/U	↓ USE IN ASSEMBLY
Duplex Wire Duplex Wire for DW Testing	or Testing		CN 0001-A M/U	DELETE

4. Update the necessary information.

PartAsser	nbly	
	Details	
Part/Assembly Duplex Wire		
Description		
Duplex	Phase Name	Phase Code PC001A
Manufact DW Tes		Cost Code
Catalog N		CC001
0001-A	Unit of Measure Material cost ft 1	Labor rate (mins) ← 10
- 11	Catalog to include this material in	
	Custom	~

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

Cost Name		Cost Code CC001	
Unit of Measure ft	Material cost	Labor rate (mins) 10	₽
Catalog to include this mai Custom	terial in		
		CANCI	EL 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.

1. On the Module Menu, click Material Catalog.

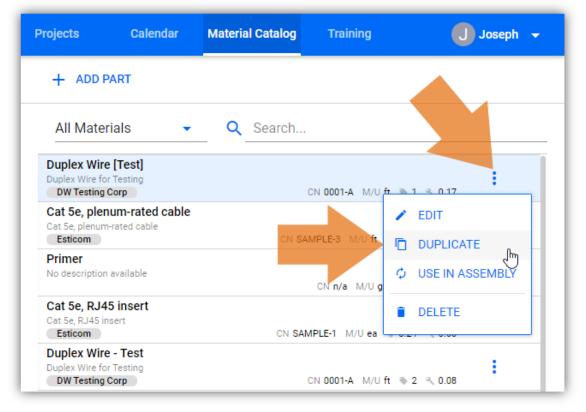
в езтісом	Dashboard	Projects	Calendar	Material Catalog	Training
Filters		+ ADD PA	RT	- Junior - Indiana - India	
Smart groups	^				
All		All Materia	als	 Q Searce 	ch
Most recently used		Duplex Wire	Testl		
Commercial & Residentia HVAC	I 🗸	Duplex Wire for T DW Testing Co	Testing		
Commercial Electrical	~	Cat 5e, plenum-r	IM-rated cable ated cable		
Commercial Flooring	~	Esticom Primer			

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

ESTICOM	Dashboard	Projects Calendar Material Catalog Training Jos	eph 👻
Filters		+ ADD PART	
Smart groups	^		
All		All Materials Q Duplex Wire	×
Most recently used		Duplex Wire [Test]	
Commercial & Residenti HVAC	al 🗸	Duplex Wire for Testing CN 0001-A M/U ft 1 % 0.17	
Commercial Electrical	~	Duplex Wire [Test] Duplex Wire for Testing DW Testing Corp CN 0001-A M/U ft M/U ft 0.17	
Commercial Flooring	~	Duplex Wire - Test	
Commercial Plumbing	~	Duplex Wire for Testing DW Testing Corp CN 0001-A M/U ft > 2 < 0.08	
Custom	~	Duplex Wire [Test]	
Fire Sprinkler Systems	~	Duplex Wire for Testing DW Testing Corp CN 0001-A M/U ft 1 3 0.17	•
Imported Parts	~	Duplex Receptacle, GFCI, 20 amp, Commercial-Grade with Box,	
Low Voltage	~	Conduit Stub-up and 3 #12 Includes conduit, one hole straps, connectors, couplings, wire nuts, 4° box, receptacle Assembly out-of-the-box CN n/a M/U ea \$1.61 \$1.64	:
Other Trades	~	Duplex Receptacle, 20 amp, Commercial-Grade with Box, Conduit	
Residential Electrical	~	Stub-up and 3 #12	
Residential Flooring	~	Includes conduit, one hole straps, connectors, couplings, wire nuts, 4" box, receptacle Assembly out-of-the-box CN n/a M/U ea to 16.23 to 16.23	-
Residential Plumbing	~		
Test Materials	~		

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



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

PartAsser	mbly			
		Details		1
Part/Assembly				
Duplex Wire	e [Test]			
Description				
Duplex	Phase Name		Phase Code	
Manufacti			PC001A	
DW Tes				
Catalog N	Cost Name		Cost Code CC001	
Catalog N 0001-A				
	Unit of Measure	Material cost	Labor rate (mins)	
	ft	<u> </u>	10	
	Catalog to include this	material in		
	Custom			~

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

		CC001	
Unit of Measure	Material cost	Labor rate (mins)	_ →
ft	· 1	10	
Catalog to include this	material in		
Custom			-
			SA

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.

	Dashboard	Projects	Calendar	Material Catalog	Training
Filters		+ ADD PA	RT	-	
Smart groups	^				
All		All Materia	als	▼ Q Sea	rch
Most recently used		Duplex Wire [[Test]		
Commercial & Residentia	al 🗸	Duplex Wire for T DW Testing Co			
Commercial Electrical	~	Cat 5e, plenu Cat 5e, plenum-ra Esticom	m-rated cable ated cable		
Commercial Flooring	~	Primer			

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

ESTICOM	Dashboard	Projects Calendar Material Catalog Training	Joseph 👻
Filters		+ ADD PART	
Smart groups	^		
All		All Materials - Q Duplex Wire	×
Most recently used		Duplex Wire [Test]	
Commercial & Residenti HVAC	al 🗸	Duplex Wire for Testing CN 0001-A M/U ft 1 3 0.17	:
Commercial Electrical	~	Duplex Wire [Test] Duplex Wire for Testing DW Testing Corp CN 0001-A M/U ft 1 3 0.17	:
Commercial Flooring	~	Duplex Wire - Test	
Commercial Plumbing	~	Duplex Wire for Testing DW Testing Corp CN 0001-A M/U ft Q 2 Q 0.08	:
Custom	~	Duplex Wire [Test]	
Fire Sprinkler Systems	~	Duplex Wire for Testing CN 0001-A M/U ft 1 % 0.17	
Imported Parts	~	Duplex Receptacle, GFCI, 20 amp, Commercial-Grade with Box,	
Low Voltage	~	Conduit Stub-up and 3 #12 Includes conduit, one hole straps, connectors, couplings, wire nuts, 4" box, receptacle Assembly out-of-the-box CN n/a M/U ea \$ 51.61 \$ 1.64	:
Other Trades	~	Duplex Receptacle, 20 amp, Commercial-Grade with Box, Conduit	
Residential Electrical	~	Stub-up and 3 #12	:
Residential Flooring	~	Includes conduit, one hole straps, connectors, couplings, wire nuts, 4* box, receptacle Assembly out-of-the-box CN n/a M/U ea > 16.23 > 1.69	-
Residential Plumbing	~		
Test Materials	~		

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

Projects	Calendar	Material Catalog	Training	JJoseph 👻
+ ADD F	PART			
All Mate	rials 🔹	Q Duplex	Wire	×
Duplex Wire Duplex Wire fo DW Testing	or Testing		CN 0001-A M/U	ft = 1 = 0.17
Duplex Wire Duplex Wire fo DW Testing	or Testing		CN 0001-A M/U	EDIT DUPLICATE
Duplex Wire Duplex Wire for DW Testing	or Testing		CN 0001-A M/U	↓ USE IN ASSEMBLY
Duplex Wire Duplex Wire for DW Testing	or Testing		CN 0001-A M/U	DELETE

- 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:

 Part Assembly 	Parts include	ed (1)		
Q Search			=	
Duplex W	Manufacturer Esticom Test Produ	into		
1 Duplex Wire DUPlex Wire	Esticom Test Produ	icts		
Dwitesu	Catalog Number			
	CN03			
Part/Assembly name	Phase Name		Phase Code	
Test Assembly	Phase Name PN03		Phase Code PC03	
	FN05		F 605	
Description	Cost Name		Cost Code	
Test Assembly	CN03		CC03	
	Unit of Measure			.→
	ea	· 1	10	-
		Calculated from parts	Calculated from parts	
	Catalog to include this ma	terial in		
	Custom	aterial III		

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	Click the drop-down arrow to select a catalog where you want this
material in	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

ea	-	1	Labor rate (mins) 10	
		Calculated from parts	Calculated from parts	
Catalog to include th	his material ir	1		
Custom				

Deleting Parts/Assemblies

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

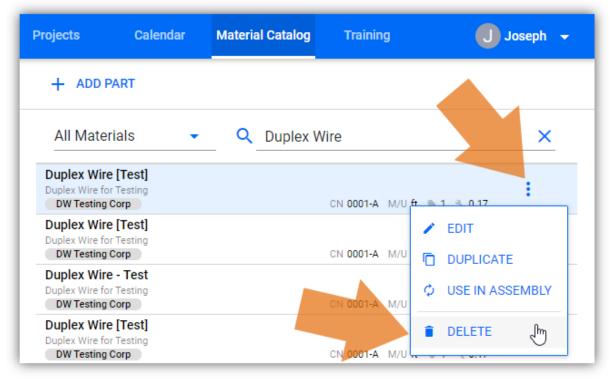
1. On the Module Menu, click Material Catalog.

	Dashboard	Projects	Calendar	Material Catalog	Training
Filters		+ ADD PAI	RT	Ð	
Smart groups	^				
All		All Materia	ls	▼ Q Sear	rch
Most recently used		Duplex Wire [-		
Commercial & Residentia HVAC	al 🗸	Duplex Wire for Te DW Testing Co	-		
Commercial Electrical	~	Cat 5e, plenur Cat 5e, plenum-ra Esticom			
Commercial Flooring	~	Primer			

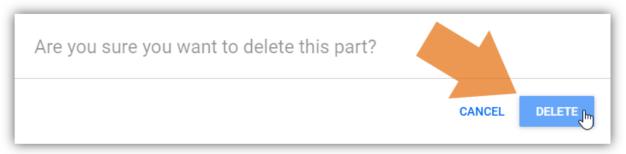
2. Use the **Search Bar** to find the part/assembly or use the **Filters** in the left pane.

	Dashboard	Projects Calendar Material Catalog Training	Joseph 👻
Filters		+ ADD PART	
Smart groups	^		
All		All Materials - Q Duplex Wire	×
Most recently used		Duplex Wire [Test]	
Commercial & Residenti HVAC	al 🗸	Duplex Wire for Testing DW Testing Corp CN 0001-A M/U ft I 1 2 0.17	:
Commercial Electrical	~	Duplex Wire [Test] Duplex Wire for Testing DW Testing Corp CN 0001-A M/U ft • 1 • 0.17	÷
Commercial Flooring	~	Duplex Wire - Test	
Commercial Plumbing	~	Duplex Wire for Testing DW Testing Corp CN 0001-A M/U ft > 2 < 0.08	
Custom	~	Duplex Wire [Test]	
Fire Sprinkler Systems	~	Duplex Wire for Testing DW Testing Corp CN 0001-A M/U ft 1 0.17	:
Imported Parts	~	Duplex Receptacle, GFCI, 20 amp, Commercial-Grade with Box,	
Low Voltage	~	Conduit Stub-up and 3 #12 Includes conduit, one hole straps, connectors, couplings, wire nuts, 4" box, receptacle Assembly out-of-the-box CN n/a M/U ea \$ 51.61 \$ 1.64	
Other Trades	~	Duplex Receptacle, 20 amp, Commercial-Grade with Box, Conduit	
Residential Electrical	~	Stub-up and 3 #12 Includes conduit, one hole straps, connectors, couplings, wire nuts, 4" box, receptacle	:
Residential Flooring	~	Assembly out-of-the-box CN n/a M/U ea > 16.23 < 1.69	
Residential Plumbing	~		
Test Materials	~		

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

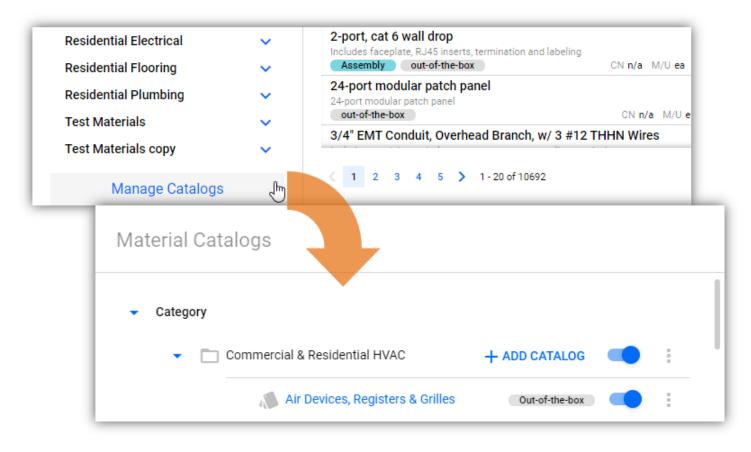


4. Click **DELETE** to continue deleting the selected material.



Manage Catalogs Link

The Manage Catalogs link lets you access the Material Catalogs window enabling you to manage materials by groups. See <u>Material Catalogs (Account Menu)</u>.



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.

	Dashboard	Projects	Calendar	Material Catalog	Training	J Josep (
+ ADD NEW PROJE	ст	A (Creation Date	• =	4 . N	Naterial Catalogs
Estimating (5)	Bid Submitter	•	ccepted (1)	In Progress (0)	O P	ersonal Profile
Vaterial Catalo	as				С	ompany Profile
	5-				U	ser management
 Category 					L	icensing
👻 🛅 Com	mercial & Residenti	al HVAC	+ ADD CAT	ALOG 🛑	:	ogout
	🛝 Air Devices, R	egisters & Grilles	Out-of-ti	he-box		3 months ado

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.

	Pipe & Duct Insulation Out-of-the-box	:	
	= 🔊 2019-11-09 16:32:39		• :
	F	+ ADD CATALOG	
CREATE NEW GROU	Test Materials Test Catalog	+ ADD CATALOG	
	 Test Materials copy 	+ ADD CATALOG	
	= 🔊 Test Catalog		• :
	CREATE NEW GROUP 1 IMPORT/EXPORT PARTS		CLOSE

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

New group (1)	+ ADD CATALOG
▼	+ ADD CATALOG
= 🔊 Test Catalog	-
Custom	
Esticom Test Materials	+ ADD CATALOG
 Esticom Test Materials Test Materials 	+ ADD CATALOG

4. After creating the group, enable and manage it by adding catalogs to the group. See <u>Adding Catalogs to a</u> <u>Group.</u>

~	Esticom Test Materials	+ ADD CATALOG	0 0
•	Test Materials		* * *
•	Custom		
	 Esticom Test Materials 		• :
	= 🔊 New catalog (1)		•
	 Test Materials 	+ ADD CATALOG	•
			-

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.

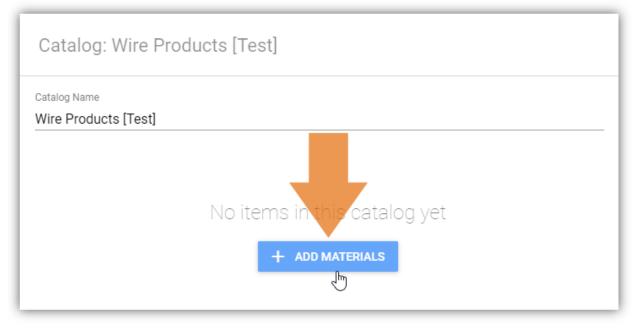
в езтісом	Dashboard	Projects	Calendar	Material Catalog	Trainir	ıg 🚺 Josepi 🤆
+ ADD NEW PROJE	ст	4	Creation Date	• =	A.	Material Catalogs
Estimating (5)	Bid Submitted	•	ccepted (1)	In Progress (0)	•	Personal Profile
Vaterial Catalog	ıs					Company Profile
						User management
 Category 						Licensing
▼ 🛅 Comr	mercial & Residenti	al HVAC	+ ADD CAT	ALOG	: "	Logout
	🔊 Air Devices, R	egisters & Grilles	Out-of-t	he-box		3 months ado

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

 Esticom Test Materia 	ls	+ ADD CATALOG	* *
= 🔊 New catalo	og (1)		0 0 0
Catalog: New Catalog	(1)		
Catalog Name			
Catalog Name			
Wire Products [Test]			
	No items in thi	s catalog yet	

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.

lters		+ ADD PART 1 X ✓ SHOW SELECTED ONLY selected
Smart groups	^	
All		All Materials - Q DUPLEX X
Most recently used		Duplex Wire [Test]
Commercial & Residential HVAC	~	Duplex Wire for Testing DW Testing Corp CN A 0001- M/U ft T 1 0.17
Commercial Electrical Commercial Flooring	* *	Duplex Wire [Test] Duplex Wire for Testing DW Testing Corp CN A 0001- M/U ft > 1 0.17
Commercial Plumbing Esticom Test Materials Fire Sprinkler Systems	* * *	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 § 16.2
Low Voltage Other Trades Residential Electrical	* * *	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 \$51.6
Residential Flooring Residential Plumbing	* *	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 3.01
Test Materials	~	Duplex Receptacle, 15A < 1

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

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

Catalog: Wire Product	s [Test]
Catalog Name	
Wire Products [Test]	
+ ADD MATERIAL	Q Search
Duplex Wire [Test] Duplex Wire for Testing DW Testing Corp	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).

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

🕄 ЕБТІСОМ	Dashboard	Projects	Calendar	Material Catalog	Trainir	ig 🛛 Josep
+ ADD NEW PROJE	ст	4	Creation Date	• =	1	Material Catalogs
Estimating (5)	Bid Submitted	(1) Ad	ccepted (1)	In Progress (0)	•	Personal Profile
Material Catalo	as					Company Profile
	5 -					User management
 Category 						Licensing
🔻 🛅 Com	mercial & Residentia	I HVAC	+ ADD CAT	ALOG 🛑	: "	Logout
	👗 Air Devices, Re	gisters & Grilles	Out-of-ti	he-box		3 months ado

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

•	📋 Esticom Test Materi	ials	+ ADD CATALOG	0 0 0	
	= 🔊 Wire Prod	ducts [Test]	Ð	0 0 0	
•	Test Materials		+ ADD CATALOG	0 0	
Cata	alog: Wire Produc	cts [Test]			
	alog: Wire Produc	cts [Test]			
Catalog	_	ots [Test]			
Catalog	Name	cts [Test] Q Search			

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.

в езтісом	Dashboard	Projects	Calendar	Material Catalog	Trainin	g J Josep 🕞
+ ADD NEW PROJE	ст	J.	Creation Date	• -	1	Material Catalogs
Estimating (5)	Bid Submitted	I (1) A	ccepted (1)	In Progress (0)	•	Personal Profile
Material Catalog	15					Company Profile
	, -					User management
 Category 						Licensing
 Comr 	nercial & Residentia	al HVAC	+ ADD CATA	LOG	: "	Logout
	🔊 Air Devices, R	egisters & Grilles	Out-of-the	e-box		3 months ado

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

🔻 🔲 Es	ticom Test Materials	+ ADD CATALOG	:
=	= 🕼 Wire Products [Test]	Toggle group	
▼ 🗋 Te	st Materials	+ ADD CATALOG	:
- Custo	om		
-	Esticom Test Materials	+ ADD CATALOG	F
	= 🔊 Wire Products [Test]	Т	oggle group
-	Test Materials	+ ADD CATALOG	• :
	= 🔊 Test Catalog		• :

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

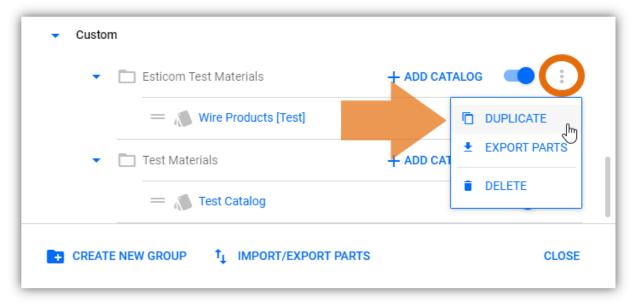
Duplicate Group

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

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

	Dashboard	Projects	Calendar	Material Catalog	Traini	ing 🛛 J Josepi 🖵
+ ADD NEW PROJEC	т	↓ (Creation Date	• =	1	Material Catalogs
Estimating (5)	Bid Submitted	•	cepted (1)	In Progress (0)	•	Personal Profile
Material Catalog	s					Company Profile
						User management
 Category 						Licensing
▼ 🗋 Comm	ercial & Residentia	al HVAC	+ ADD CATA	ALOG 🛑	.	Logout
	🚺 Air Devices, Re	egisters & Grilles	Out-of-th	he-box		3 months ado •

- 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.

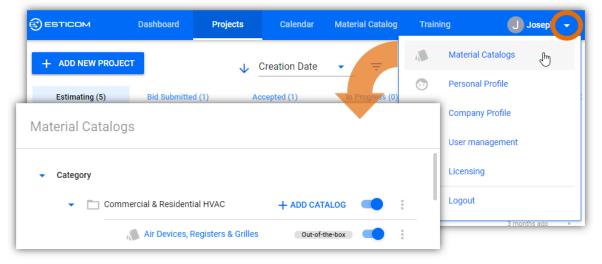
✓ Custom	
Esticom Test Materials ADD CATALOG	0 0 0
= 🔊 Wire Products [Test]	0 0 0
Esticom Test Materials copy ADD CATALOG	0 0
= 🔊 Wire Products [Test]	0 0 0
Test Materials + ADD CATALOG	:
= 🔊 Test Catalog	:
CREATE NEW GROUP 1 IMPORT/EXPORT PARTS	CLOSE

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.

• □	Esticom Test Materials	+ ADD CATA	
	= 🔊 Wire Products [Test]		DUPLICATE
- C] Test Materials	+ ADD CAT	EXPORT PARTS
	= 🔊 Test Catalog		DELETE
+ CREATE N	EW GROUP 1 IMPORT/EXPORT PA	APTS	CLOSE

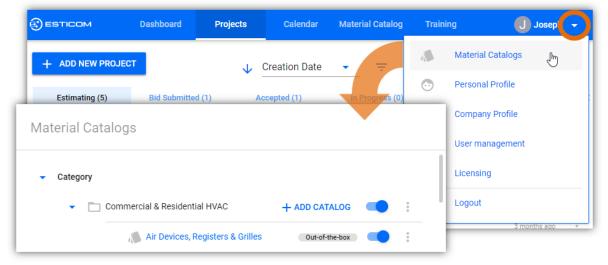
- Select the EXPORT PARTS to download the selected group's parts.
 a. An Excel file will be downloaded to your device.
- 4. Find the downloaded file and open it to view.

= 🔊 Test Catalog	- :
CREATE NEW GROUP 1 IMPORT/EXPORT PARTS	CLOSE
CustomParts (4).xlsx	

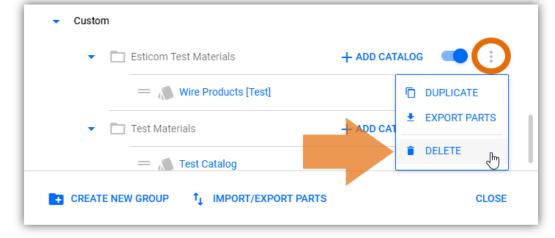
Delete Groups

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.

Do you really want to delete Esticom Test Materials		
	CANCEL	DELETE

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

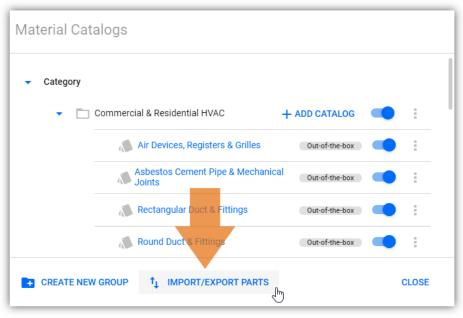
In this section, you will learn how to download the materials template so you can import custom materials to Esticom using the preformatted Excel file.

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.

🕄 ЕБТІСОМ	Dashboard	Projects	Calendar	Material Catalog	Training	J Josep 🗸
+ ADD NEW PROJE	ст	↓ (Creation Date	• =		Material Catalogs
Estimating (5)	Bid Submitted		cepted (1)	In Progrezs (0)		Personal Profile
Material Catalog	ıs				0	Company Profile
						Jser management
 Category 						icensing
 Com 	mercial & Residenti	al HVAC	+ ADD CATA	ALOG 🛑	: 1	_ogout
	🔊 Air Devices, R	egisters & Grilles	Out-of-th	ne-box	:	3 months ago

- 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:

Import/Export materials	
Export your custom parts to excel or <u>use empty template</u>	
or import items from Trade Service	
IMPORT PARTS FROM TRADE SERVICE	
c	LOSE

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. <u>Note</u>: 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.

		Out-of-the-box	
	CREATE NEW GROUP	↑ IMPORT/EXPORT PARTS	
🛍 EsticomSam	ipleimxlsx ^ 📐		

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.

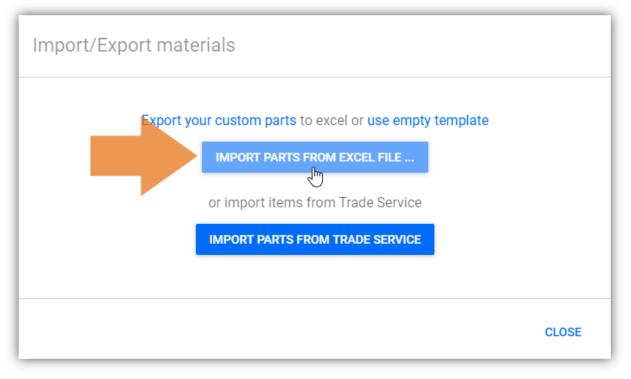
a. The Material Catalogs window will appear.

	Dashboard	Projects	Calendar	Material Catalog	Training	J Josep 🔫
+ ADD NEW PROJE	ст	¥ (Creation Date	• =		Material Catalogs
Estimating (5)	Bid Submittee	_	cepted (1)	In Progress (0)		Personal Profile
Material Catalogs				Company Profile		
						User management
 Category 						Licensing
🗸 🛅 Comr	nercial & Residenti	al HVAC	+ ADD CAT	ALOG	: 1	Logout
	Air Devices, R	egisters & Grilles	Out-of-ti	he-box	:	3 months ado 🔹 🔹

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

Material Catalo	gs		
 Category 			
🔻 🗋 Com	mercial & Residential HVAC	+ ADD CATALOG	0 0 0
	🔊 Air Devices, Registers & Grilles	Out-of-the-box	0 0 0
	Asbestos Cement Pipe & Mechani Joints	Out-of-the-box	0 0 0
	Rectangular Duct & Fittings	Out-of-the-box	0 0 0
	Round Duct & Fittings	Out-of-the-box	0 0 0
CREATE NEW GRO	DUP 1 IMPORT/EXPORT PARTS	ſ	CLOSE

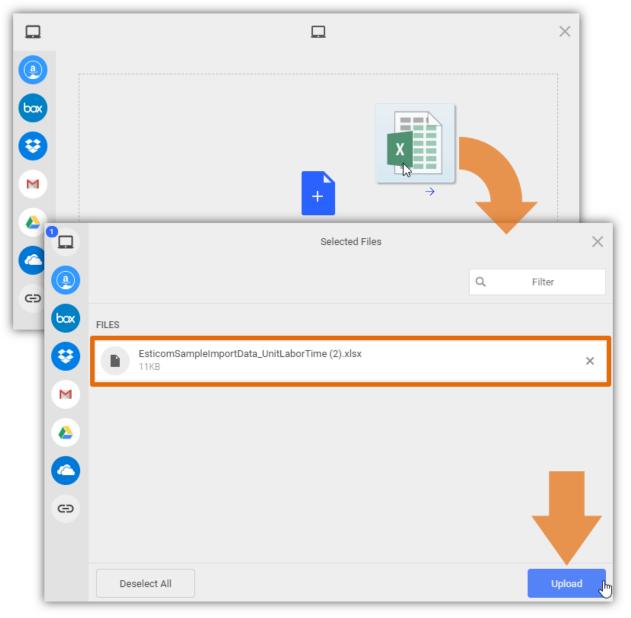
- 3. Click the IMPORT PARTS FROM EXCEL FILE... button.
 - a. The Select Files to Upload window will appear.



- 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. <u>Note</u>: 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.

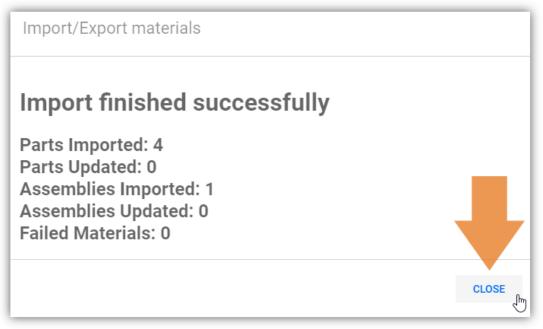
Esticom Materials Management Guide

- 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. <u>Note</u>: 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

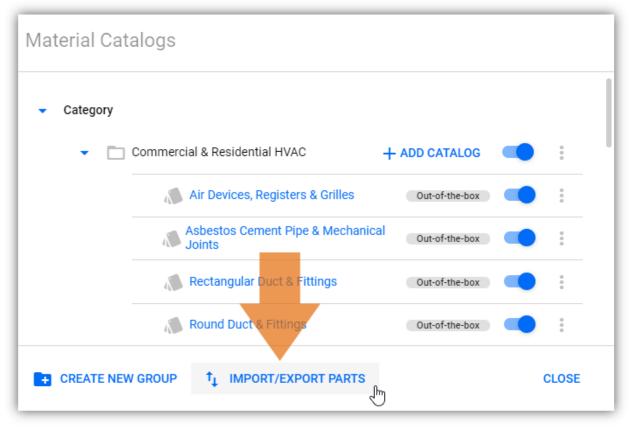
Use the IMPORT PARTS FROM TRADE SERVICE option to upload materials from Trade Service. It is worth noting that Trade Service have their own format. You can get the Trade Service Template when you export your data from them and import it to Esticom using this option.

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

в) езтісом	Dashboard	Projects	Calendar	Material Catalog	Training	J Josep
+ ADD NEW PROJE	ст	1 (Creation Date	• =	4 . N	Naterial Catalogs
Estimating (5)	Bid Submitted	•	ccepted (1)	In Progress (0)	💿 P	ersonal Profile
Material Catalo	as				с	ompany Profile
	5 -				U	ser management
 Category 					L	icensing
▼ 🗋 Com	mercial & Residentia	al HVAC	+ ADD CATA	LOG 🛑	: 6	ogout
	Air Devices, R	egisters & Grilles	Out-of-the	e-box	:	3 months ado

2. Click the IMPORT/EXPORT PARTS link.

a. The Import/Export materials window opens.

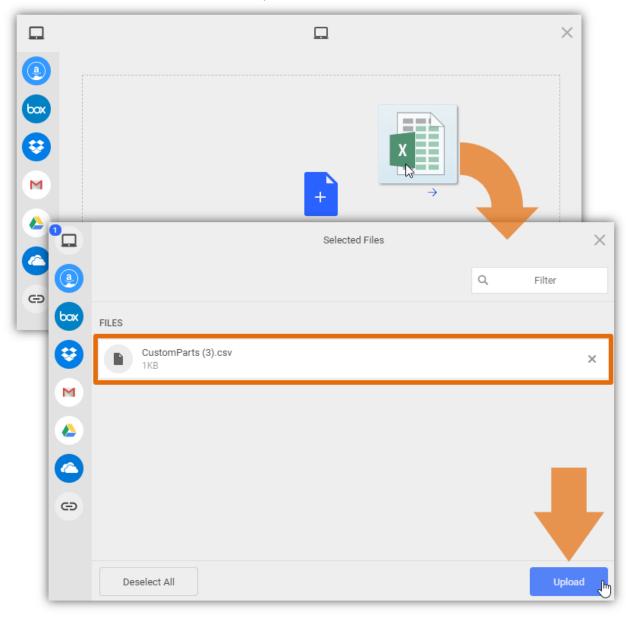


3. Click the IMPORT PARTS FROM TRADE SERVICE button.

a. The Select Files to Upload window will appear.

Import/Export materials	
Export your custom parts to excel or use empty template IMPORT PARTS FROM EXCEL FILE	
or import items from Trade Service IMPORT PARTS FROM TRADE SERVICE	
	CLOSE

- 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. <u>Note</u>: 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. <u>Note</u>: 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.

	Dashboard	Projects	Calendar	Material Catalog	Traini	ing J Josep -
+ ADD NEW PROJE	ст	↓ (Creation Date	• =		Material Catalogs
Estimating (5)	Bid Submitted	-	cepted (1)	In Progress (0)	••	Personal Profile
Material Catalo	as					Company Profile
	50					User management
 Category 						Licensing
▼ 🗋 Com	mercial & Residentia	I HVAC	+ ADD CATA	LOG	. 1	Logout
	Air Devices, Re	gisters & Grilles	Out-of-th	e-box		3 months ago

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- 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.

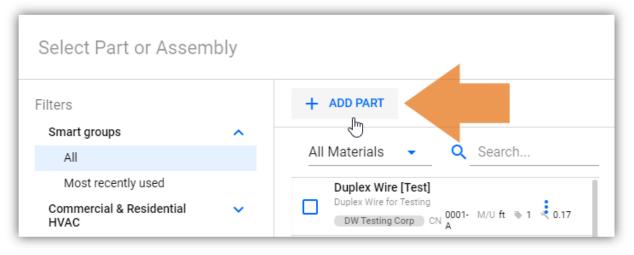
	Esticom Test Materials	+ ADD CATALOG	•
	= 🔊 Wire Products [Test]	J.	• :
•	Test Materials	+ ADD CATALOG	• :
Cat	- La su Müna Dua durata [Ta at]		
Cata	alog: wire Products [Test]	•	
	alog: Wire Products [Test]		
Catalog			
Catalog	Name		

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

≥ 1 ≥ 017
a 1 ≪ 0.17
0 h
Search
Search

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

O Assembly			
		Details	
Part/Assembly name			
Cat 5e			
Description			
Cat 5e			
	Phase Name		Phase Code
Manufacturer	PN01		PC01
Esticom Tes	On ad Marrie		0-10-1
Catalog Number	Cost Name CN01		Cost Code CC01
CN01			
	Unit of Measure	Material cost	Labor rate (mins) 🚑
	ft	2	2
	Catalog to include this mate	rial in	
	Custom		~

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	Click the drop-down arrow to select a catalog where you want this	
material in	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.

CN01			CC01
Unit of Measure		Material cost	Labor rate (mins) 🔶
ft	~	2	2
Catalog to include this m	aterial in		
Custom			

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

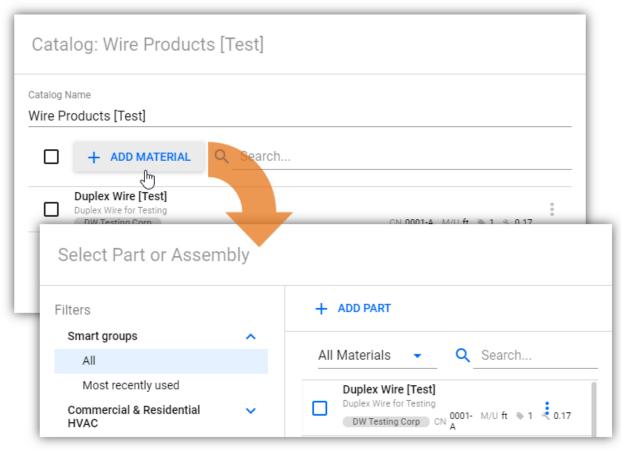
a. The Material Catalogs window will appear.

ESTICOM	Dashboard	Projects	Calendar	Material Catalog	Trainin	ng 🛛 Josep
+ ADD NEW PROJE	ст	1 (Creation Date	• =	8	Material Catalogs
Estimating (5)	Bid Submitted	•	cepted (1)	In Progress (0)	•	Personal Profile
Vaterial Catalog	ls					Company Profile
·	·					User management
 Category 						Licensing
 Comr 	mercial & Residentia	al HVAC	+ ADD CATA	ALOG 🛑	: "	Logout
	Air Devices, R	egisters & Grilles	Out-of-th	ne-box		3 months ado

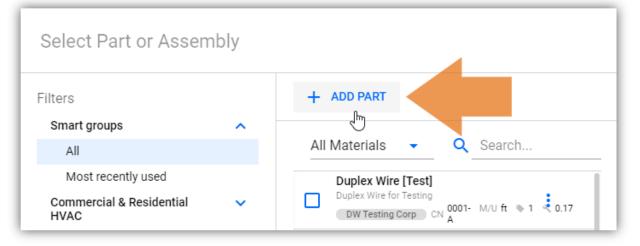
2. Scroll down to the **Custom** folder and find the group where you want to add the assembly to.

	Esticom Test Materials	+ ADD CAT	ALOG	:	
	= 🔊 Wire Products [Test]	ţ.		:	
•	Test Materials	+ ADD CAT	ALOG	:	
Cat	alog: Wire Products [Test]				
Cat	alog: Wire Products [Test]				
Catalog) Name				
Catalog Wire) Name Products [Test]				
Catalog) Name	ch			
Catalog Wire) Name Products [Test]	ch			

- 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)
Q Search	
	h or browse catalog for finding the parts. SE PARTS CATALOG

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

Create Part or Assembly	
 Part Assembly 	
Parts <mark>includ</mark> ed (0)	
Q Search	
No parts included yet. Use search or prowse catalog for finding the parts.	
:≡ BROWSE PARTS CATALOG	
Details	

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

Select Part or Assen	nbly	
Filters		SHOW SELECTED ONLY 2 selected X
Smart groups	^	
All		Q Search
Most recently used		Duplex Wire [Test]
Commercial & Residential HVAC	~	Duplex Wire for Testing DW Testing Corp CN A
Commercial Electrical	~	Cat 5e, plenum-rated cable
Commercial Flooring	~	SAMPLE- M/U ft > 0.15 < 0.01
Commercial Plumbing	~	Primer
Custom	~	No description available CN n/a M/U gal ັ 5
Fire Sprinkler Systems	~	Cat 5e, RJ45 insert
Imported Parts	~	Cat 5e, RJ45 insert Esticom CN 1 SAMPLE- M/U ea 3.24 0.08
Low Voltage	~	Duplex Wire - Test
Other Trades	~	Duplex Wire for Testing DW Testing Corp CN A DW Testing Corp CN A DW Testing Corp CN A
Residential Electrical	~	
Residential Flooring	~	Duplex Wire [Test] Duplex Wire for Testing
Residential Plumbing	~	DW Testing Corp CN A 0001- M/U ft > 1 < 0.17
Test Materials	~	6-port faceplate with ID window
Test Materials copy	~	6-port faceplate with ID window Esticom CN 2 SAMPLE- M/U ea ♦ 1.56 €0.08
		< 1 2 3 4 5 > 1-10 of 9890
		CANCEL SELECT

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

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

Create Par	t or Assembly	
PartAss	embly Parts included (2)	
Q Sear	ch	
1 Ca	at 5e, plenum-rated cable at 5e, plenum-rated cable Esticom CN SAMPLE-3 M/U ft 🔿 0.15 🔦 0.01	×
1 Du	uplex Wire [Test] uplex Wire for Testing DW Testing Corp CN 0001-A M/U ft 🔿 1 🔦 0.17	×
	Details	

12. Specify the Assemble Details:

	D	etails			
Part/Assembly name					
Test Cat 5e, plei	num-rated cable			II	
Description					
Test Cat <u>5e</u> ,	Phase Name			Phase Code	
Manufacturer	PC02			PC02	
	Cost Name			Cost Code	
Catalog Number	CN01			CC02	
TC02	Unit of Measure				_
	ft	$\overline{\nabla}$	1.15	10.45	-
			Calculated from parts	Calculated from parts	
	Catalog to include this	material in	1		
	Custom				_

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	Click the drop-down arrow to select a catalog where you want this
material in	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.

Unit of Measure		Material cost		
ft	~	1.15	10.45	
		Calculated from parts	Calculated from parts	
Catalog to include this	s material ir	1		
Custom				
				_
			CANCEL	SAV

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.

	Dashboard	Projects	Calendar	Material Catalog	Trainin	g 🛛 J Josep 🗸 🗸
+ ADD NEW PROJE	ст	¥ (Creation Date	• =	1	Material Catalogs
Estimating (5)	Bid Submitted	•	ccepted (1)	In Progress (0)	•	Personal Profile
Material Catalog	15					Company Profile
	,-					User management
 Category 					- 11	Licensing
👻 🛅 Comr	nercial & Residentia	al HVAC	+ ADD CATA	NLOG 🛑	:	Logout
	Air Devices, R	egisters & Grilles	Out-of-th	e-box		3 months ado

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

•	📄 Esticom Test Material	s	+ ADD CATALOG	0 0 0	
	= 🔊 Wire Produ	cts [Test]	1	0 0 0	
•	Test Materials		+ ADD CATALOG		
Cat	alog: Wire Product	s [Test]			
	_	s [Test]			
Catalog	_	s [Test]			
Catalog	Name	s [Test]			

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

Cata	log: Wire Produc	ts [Test]		
Catalog Mire P	Name roducts [Test]			
	+ ADD MATERIAL	Q Search		
	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

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

PartAsser	nbly	
	Details	
Part/Assembly		
Duplex Wire	e [Test]	
Description		
Duplex	Phase Name	Phase Code
Manufact	The Mane	PC001A
DW Tes		
Catalog N	Cost Name	Cost Code CC001
0001-A		
	Unit of Measure Material cost	Labor rate (mins)
	<u>tt</u> <u>1</u>	10
	Catalog to include this material in	
	Custom	~

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

		CC001	
Unit of Measure ft	Material cost	Labor rate (mins) 10	₽
Catalog to include this r Custom	material in		

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.

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

ESTICOM	Dashboard	Projects	Calendar	Material Catalog	Training	g 🔰 J Josep 🗸 🗸
+ ADD NEW PROJE	ст	1 (Creation Date	• =	1	Material Catalogs
Estimating (5)	Bid Submitte	• -	ccepted (1)	In Progress (0)	•	Personal Profile
Material Catalog	IS					Company Profile
					_	User management
 Category 						Licensing
 Comn 	nercial & Residenti	al HVAC	+ ADD CATA	LOG	:	Logout
	🛝 Air Devices, R	egisters & Grilles	Out-of-the	e-box	:	3 months ago 4

2. Find the group where the material is saved.

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

•	📄 Esticom Test Materi	ials	+ ADD CATALOG	0 0	
	= 🔊 Wire Prod	ducts [Test]	Ð	* • •	
•	Test Materials		+ ADD CATALOG	0 0	
Cata	alog: Wire Produc	cts [Test]			
Cata	alog: Wire Produc	cts [Test]			
Catalog	Name	cts [Test]			
Catalog		cts [Test]			
Catalog	Name	cts [Test] Q Search			

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

Cata	log: Wire Products [Test]	
Catalog I Wire P	Name roducts [Test]	
	+ ADD MATERIAL Q Search	
	Duplex Wire [Test] Duplex Wire for Testing DW Testing Corp	CN 0001-A M/U ft 🔿 1 🔍 0.17
		EDIT
		DELETE

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

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

PartAsser	nbly			
		Details		
Part/Assembly Duplex Wire				
Description Duplex Manufacti	Phase Name		Phase Code PC001A	
DW Tes Catalog N	Cost Name		Cost Code CC001	
0001-A	Unit of Measure	Material cost	Labor rate (mins)	→
	ft	• 1	10	-
	Catalog to include this ma	aterial in		
	Custom			~

- 7. Click **SAVE** to create a duplicate material.
- 8.

Cost Name			Cost Code CC001	
Unit of Measure		Material cost	Labor rate (mins)	
ft	Ŧ	1	10	
Catalog to include this	material ir	n		
Custom				
			CANCE	L 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.

	Dashboard	Projects	Calendar	Material Catalog	Training	g 🛛 J Josep' 🗸
+ ADD NEW PROJEC	т	1 (Creation Date	• =	1	Material Catalogs
Estimating (5)	Bid Submittee	• -	cepted (1)	In Progress (0)	•	Personal Profile
Material Catalog	S					Company Profile
					_	User management
 Category 						Licensing
🗸 📄 Comn	nercial & Residenti	al HVAC	+ ADD CATA	ALOG 🥌	:	Logout
	Air Devices, R	egisters & Grilles	Out-of-th	ne-box		3 months ago

- 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.

 Esticom Test Materials 	🕂 ADD CATALOG 🛛 💶 🗄
= 🔊 Wire Products [Test]	
 Test Materials 	+ ADD CATALOG
Catalog: Wire Products [Test]	
Catalog: Wire Products [Test]	
Catalog Name	
Catalog Name Wire Products [Test]	
Catalog Name	
Catalog Name Wire Products [Test]	CN 0001-A M/U ft @ 1 % 0.1

- 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.

Cata	llog: Wire Produc	ts [Test]		
Catalog I Wire P	Name roducts [Test]			
	+ ADD MATERIAL	Q Search		
	Duplex Wire [Test] Duplex Wire for Testing DW Testing Corp		CN 0001-	A M/U ft 🖜 1 🔍 0.17
				🖍 EDIT
				DUPLICATE
				OSE IN ASSEMBLY

- 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:

PartAssembly	Parts include	ed (1)		
Q Search				
	Manufacturer		•	
Duplex W 1 Duplex Wire	Esticom Test Produ	ucts		
DW Testin	Catalog Number			
	CN03			
Part/Assembly name				
Test Assembly	Phase Name PN03		Phase Code PC03	
	FINUS		PC03	
Description	Cost Name		Cost Code	
Test Assembly	CN03		CC03	
	Unit of Measure			
	ea	· 1	10	-
		Calculated from parts	Calculated from parts	
	Catalog to include this ma	aterial in		
	Custom			~

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				
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	Click the drop-down arrow to select a catalog where you want this			
material in	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	~	1	10	
		Calculated from parts	Calculated from parts	
Catalog to include this	material ir	1		
Custom				
Custom				
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.

в езтісом	Dashboard	Projects	Calendar	Material Catalog	Training	J Josep -
+ ADD NEW PROJ	ЕСТ	1 (Creation Date	• =		Material Catalogs
Estimating (5)	Bid Submitted	•	cepted (1)	In Progress (0)	•	Personal Profile
Material Catalo	as					Company Profile
	5-					User management
 Category 						Licensing
 Com 	mercial & Residentia	I HVAC	+ ADD CAT	ALOG 🛑	: "	Logout
	🔊 Air Devices, Re	egisters & Grilles	Out-of-ti	he-box		3 months ado

- 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.

•	🛅 Est	icom Test Mate	rials	+ ADD CATALO	G	:	
	=	= 🔊 Wire Pro	oducts [Test]	ſ		:	
•	🗖 Te	st Materials		+ ADD CATALO	og 🔹	:	
Cat	alog: V	Vire Produ	cts [Test]				
		Vire Produ	cts [Test]				
Catalog			cts [Test]				
Catalog	Name Products						

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

Cata	log: Wire Produc	ts [Test]		
Catalog Mire P	Name roducts [Test]			
	+ ADD MATERIAL	Q Search		
	Duplex Wire [Test] Duplex Wire for Testing DW Testing Corp		CN 0001-A	M/U ft ຈ 1 ≪ 0.17
				🖍 EDIT
				DUPLICATE
				DELETE

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

Do you really want to delete selected materials?		
	CANCEL	DELETE