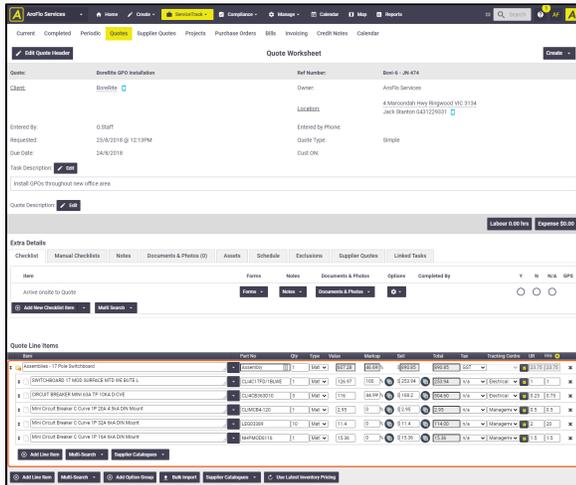


Assemblies

Assemblies allow you to specify a list or kit of items that can be used in a quote or task. Existing inventory items can be added to the list in set quantities, while custom cost and sell pricing can be set for each item, or existing inventory pricing used. Labour units can be set against list items, which will be applied when the Assembly is used in a quote.

For example, quoting installation of a new power outlet may require multiple items in specific quantities. These items can be included in an Assembly, and added to a quote as a single group rather than individually. Any labour component will be included against the items and costed separately.

- Faster quoting using pre-configured lists or kits.
- Easier to book materials while working on a job.



Create an assembly

View our **Inventory Management** product page

Videos

-

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 - [Add assembly items](#)
- [Edit or delete an assembly](#)
- [Using the Wizard](#)

Related articles

- [Custom Holders](#)
- [Invoice Schedule of Rates \(SOR\) Items](#)
- [Linking Tasks](#)
- [Edit Task Header](#)
- [Set up Variable Service Templates](#)

1. Go to **Manage > Inventory**.
2. On the **Inventory Lists** tab, click **Add Inventory Lists**.
3. Select an **Inventory List Category** from the list.

 **No categories?**

Assemblies, Task Lists and SOR Lists have their own categories panel. This is because these categories contain lists with multiple items. These categories can be added the same way as in the [Inventory](#) tab.

4. Enter an **Inventory List Name** e.g. 'GPO Install'.
5. Set the **List Type** to **Assembly**.
6. Click **Save** (see image).

Add New Inventory List ✕

Business Unit:

Inventory List Category:
 🔍

Inventory List Name:

List Type

Add assembly items

1. To add items to an Assembly, click **Edit Inventory List Items**.

List Type	Edit Inventory List Items	Edit Inventory List
Assembly		
Assembly	 Edit Inventory List Items	
Task Specific List		

2. Click **Add items**.

- Use the search fields at the top of the list to locate the required item and click to add the item to the Assembly.

 Inventory items set as SOR items will not appear for use in an assembly.

Add Inventory Items - (0.209s)

Category: Part No: Item:

GPO Accessories	53453543	DGPO HPM
GPO Accessories	GPO10250	Double GPO's
GPO Accessories	HPM-D2542	HPM Double GPO
GPO Accessories	0248587	Weather Proof GPO
GPO, 2000/C2000: CLI	2025	GPO DOUBLE 2000 SERIES WHITE
GPO, 2000/C2000: CLI	SC2025	GPO DOUBLE SLIMLINE WHITE
Miscellaneous	LEGED787WE	GPO Standard 1G Horiz 10A 230/240V White
Miscellaneous	LEGED777XWE	GPO Standard 2G Horiz 10A 230/240V Extra Function White
Miscellaneous	LEGED777WE	GPO Standard 2G Horiz 10A 230/240V White
Miscellaneous	CLI4025XPW	GPO Standard 2G Horiz 10A 250V 1xSwitch P/White
Miscellaneous	CLISC2025XAW	GPO Standard 2G Horiz 10A 250V 1xSwitch White
Miscellaneous	CLI4025HS	GPO Standard 2G Horiz 10A 250V H/Silver

- Repeat for each item required, then close the list.
- Click **Save**.
- Set the quantity (**Qty**) levels required for each assembly item.
- Update the **Cost** price if a discount is received when purchasing the item as part of an Assembly. Alternatively, tick **Use Inv Pricing** to use the cost / sell already set in the properties of the Inventory Item.

Use inventory pricing

If the **Use Inv Pricing** box is not ticked, the prices for each inventory item inside this assembly will not update when the inventory price gets updated.

- Set the labour hours per part under the **Lab** heading. These will be applied per unit when the Assembly is used in a Quote.
- In the **Settings** area, set the Quote/Task/Invoice pricing to use either 'Cost', 'Calculated Cost' or 'Sell'.

Inventory List Items

Switchboard

Part No	Item	Qty	Cost	Calculated Cost	Qty Sell	Task Sell	Invoice Sell	Lab	Use Inv Pri
CLAC17FD18LWE	SWITCHBOARD 17 MOD SURFACE MTD WE BUTE L	<input type="text" value="1"/>	<input type="text" value="80"/>	\$126.97	<input type="text" value="88"/>	<input type="text" value="139.667"/>	<input type="text" value="88"/>	<input type="text" value="1"/>	<input type="checkbox"/>
CLAC3303D10	CIRCUIT BREAKER MINI 63A TP 10KA D-CVE	<input type="text" value="3"/>	<input type="text" value="116"/>	\$168.20	<input type="text" value="127.6"/>	<input type="text" value="127.6"/>	<input type="text" value="127.6"/>	<input type="text" value="0.25"/>	<input type="checkbox"/>
CLIMC84-110	Mini Circuit Breaker C Curve 1P 10A 6kA DIN Mount	<input type="text" value="1"/>	<input type="text" value="2.95"/>	\$2.95	<input type="text" value="3.245"/>	<input type="text" value="3.245"/>	<input type="text" value="3.245"/>	<input type="text" value="0.5"/>	<input type="checkbox"/>
NHFM06110	Mini Circuit Breaker C Curve 1P 10A 6kA DIN Mount	<input type="text" value="10"/>	<input type="text" value="15.36"/>	\$15.36	<input type="text" value="16.896"/>	<input type="text" value="16.896"/>	<input type="text" value="16.896"/>	<input type="text" value="1"/>	<input type="checkbox"/>
TERDTCB110C	Mini Circuit Breaker C Curve 1P 10A 6kA DIN Mount	<input type="text" value="1"/>	<input type="text" value="32.91"/>	\$32.91	<input type="text" value="36.201"/>	<input type="text" value="36.201"/>	<input type="text" value="36.201"/>	<input type="text" value="1.5"/>	<input type="checkbox"/>

Settings

List Type: Quote Using: Task Price Using: Invoice Using:

 If 'Cost' or 'Calculated Cost' is selected, the item will apply the percentage Markup currently set against the inventory item. If 'Calculated Cost' is selected and no **Calculated Cost Type** is set against the item in inventory, then the sell price will be \$0.00.

- To remove any unwanted items from the Assembly, click the  (red trash can) icon.
- Click **Save**.

Edit or delete an assembly

To edit the details of an assembly such as the **Inventory List Name** or **Inventory List Category**, or to delete an Assembly:

1. From the **Inventory Lists** tab, double click the Assembly or click **Edit Inventory List** (see image).
2. Update the Assembly details and click **Save**, or **Delete** to delete the Assembly (see image).



All items must be removed from the Assembly before it can be deleted.

List Type	Edit Inventory List Items	Edit Inventory List
Assembly		
Assembly		
Task Specific List		

Edit Inventory List

Edit Inventory List ✕

Business Unit:

Inventory List Category:

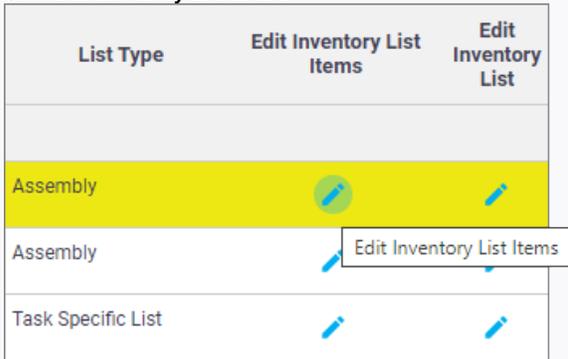
Inventory List Name:

List Type

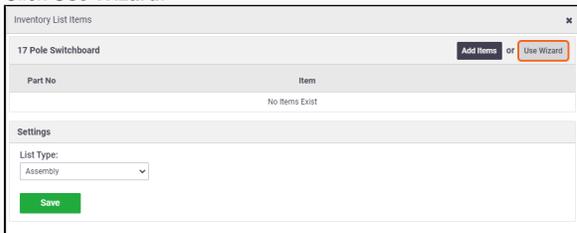
Using the Wizard

The Wizard can be used to auto-add items to a new Assembly based on past usage in the system.

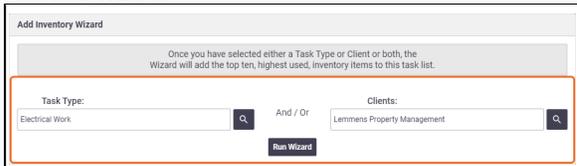
1. Click **Edit Inventory List Items**.



2. Click **Use Wizard**.



3. Select a **Task Type** and/or a **Client**.
4. Click **Run Wizard**.



5. Remove any unwanted items by using the  (red trash can) and click **Save**.

