

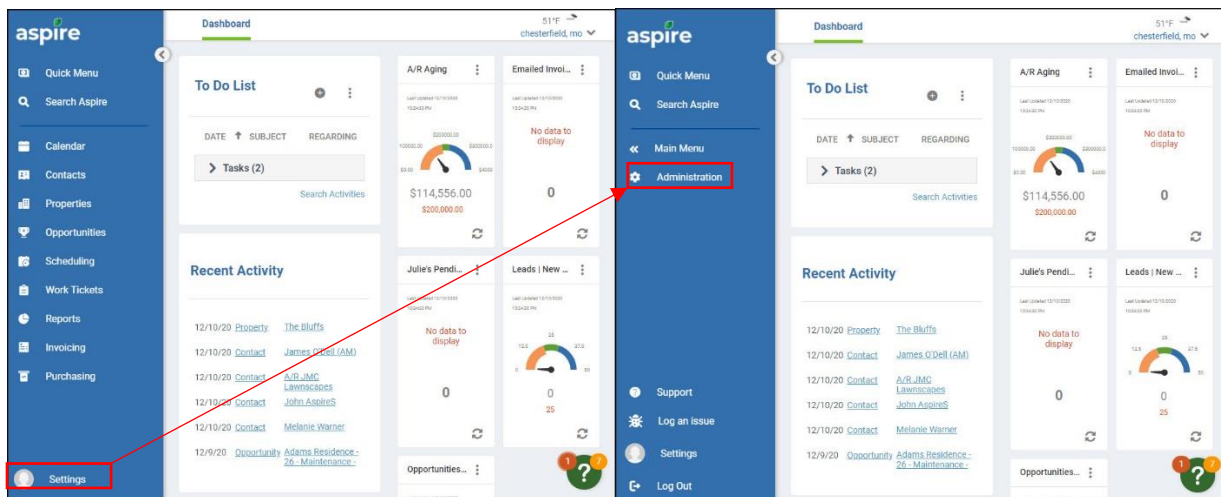
Creating an Auto Kit & Creating Sub-Kits in the Item's Catalog

Purpose: To be used when a specific kit can be applied to multiple items or other kits. For example: A 5-gallon plant installation kit could be auto-kitted with all 5-gallon plants in the items catalog.

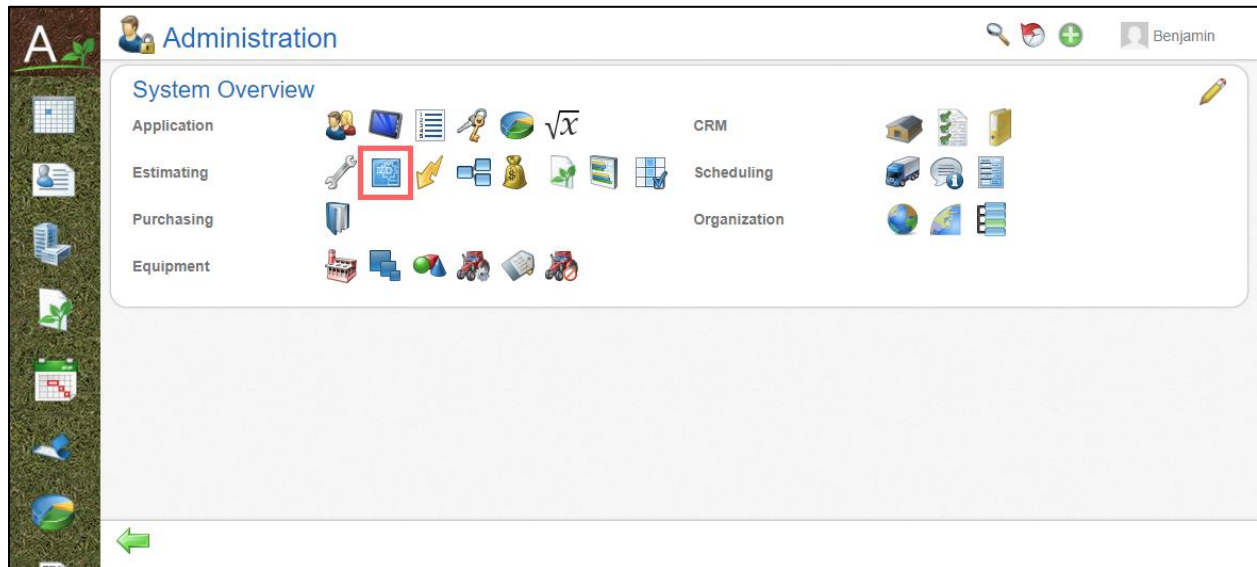
Prerequisites:

1. Admin user
2. Branch admin with the enhanced branch admin security

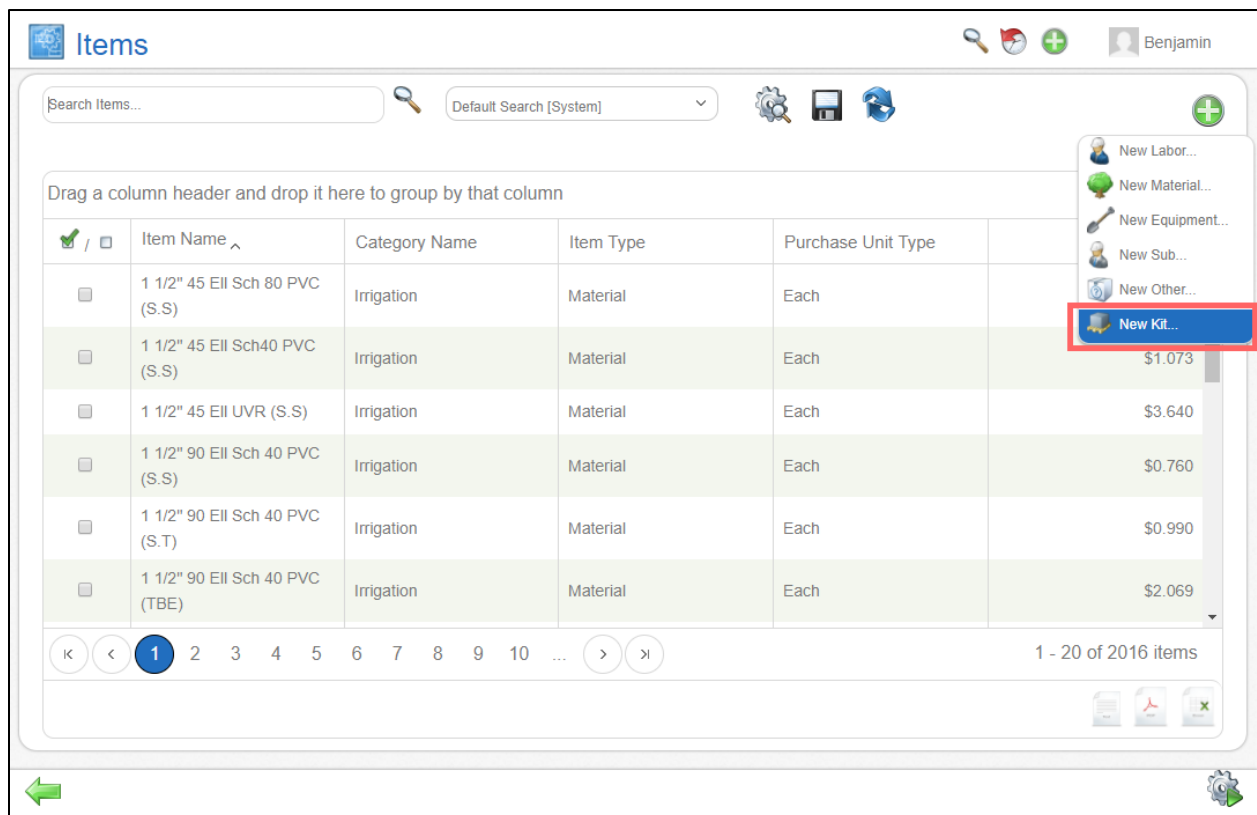
To create a kit to the catalog, follow these steps:

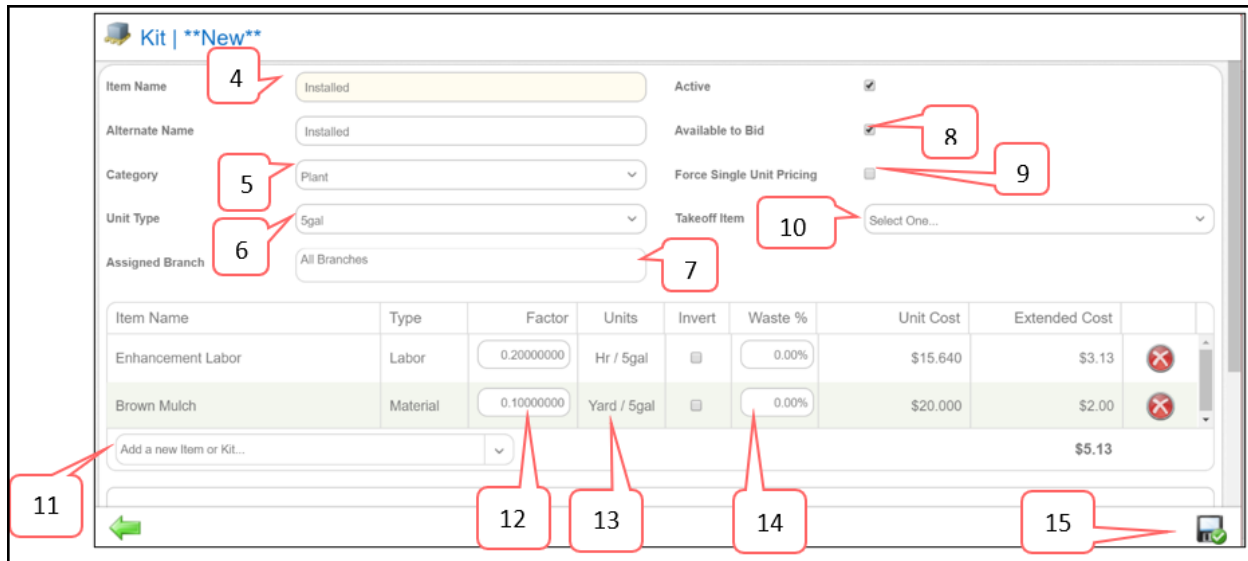


1. Click on Settings on the main menu.
2. Click on Administration.



1. Press the blue gear.
2. Hover over the green plus
3. select New Kit.





Kit | **New**

Item Name: Installed (4) Active: ☒ Available to Bid: ☒ (8) Force Single Unit Pricing: ☐ (9)

Alternate Name: Installed

Category: Plant (5) Takeoff Item: Select One... (10)

Unit Type: 5gal (6) Assigned Branch: All Branches (7)

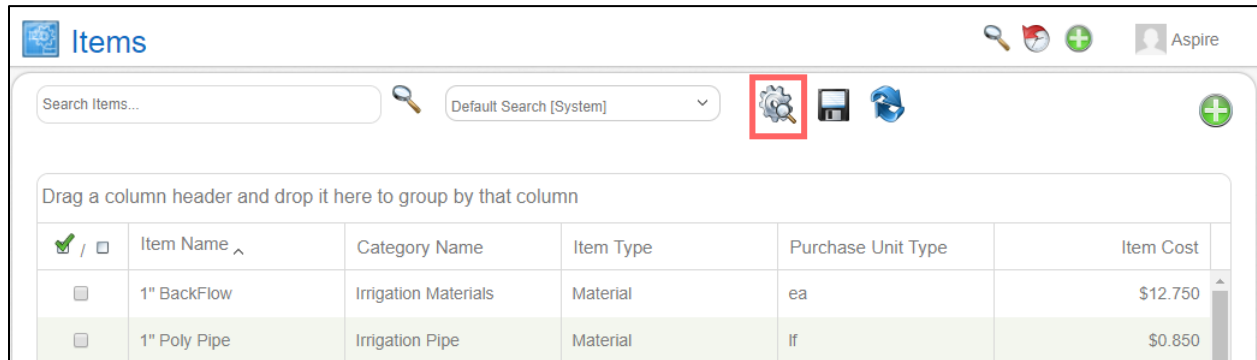
Item Name	Type	Factor	Units	Invert	Waste %	Unit Cost	Extended Cost
Enhancement Labor	Labor	0.20000000	Hr / 5gal	<input type="checkbox"/>	0.00%	\$15.640	\$3.13
Brown Mulch	Material	0.10000000	Yard / 5gal	<input type="checkbox"/>	0.00%	\$20.000	\$2.00

Add a new Item or Kit... (11)

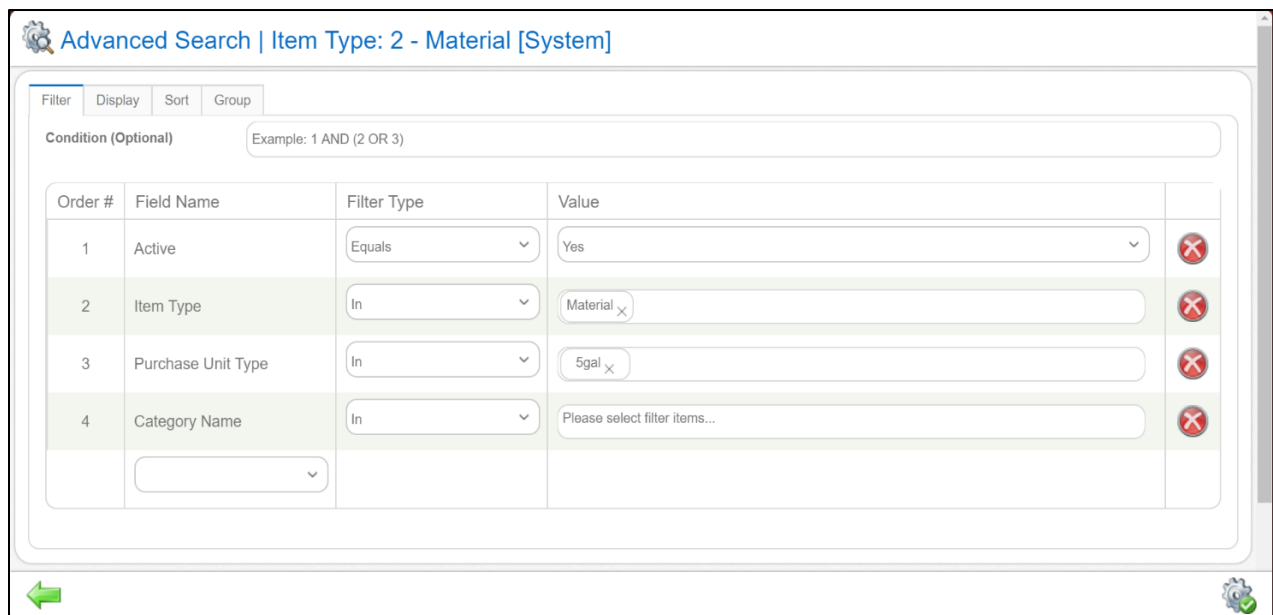
Green Arrow (12) Save (15)

4. Type in the Item Name. The Alternate Name will copy but is not required.
Note: Aspire Recommends naming a plant installation kit simply as "Installed". The unit type will differentiate between the various "Installed" kits. This is done so that after the auto kit is preformed, the New kit's name would read Boxwood - Installed
5. Select an Item Category.
6. Select how the kit should be measured.
Examples: If a plant, enter the container size; if a tree, enter the caliper; for hardscape kits, enter SQFT, or LNFT.
7. Assign the branch for where the item will be available. Leave it blank if available to all branches.
8. Select the checkbox if the item will be available to bid on an estimate.
9. If desired, check the Force single unit pricing box. This is helpful for planting material kits and construction. Click for more information on [Single Unit Pricing](#).
10. If the pricing will be based on a Takeoff Item, then select the Takeoff Item.
11. Add all the necessary Items that will belong inside the kit except for the material to be added when auto-kitted.
Example: If auto-kitting for all 5-Gallon plant, create the kit with all other items except for the plant.
12. Enter the appropriate factor (production rate) for each item within the kit.
13. Invert reverses the numerator and denominator units.
14. Adding a Waste % will increase that material amount by the set percentage on an estimate and in the purchasing assistant.
15. Save the Item.

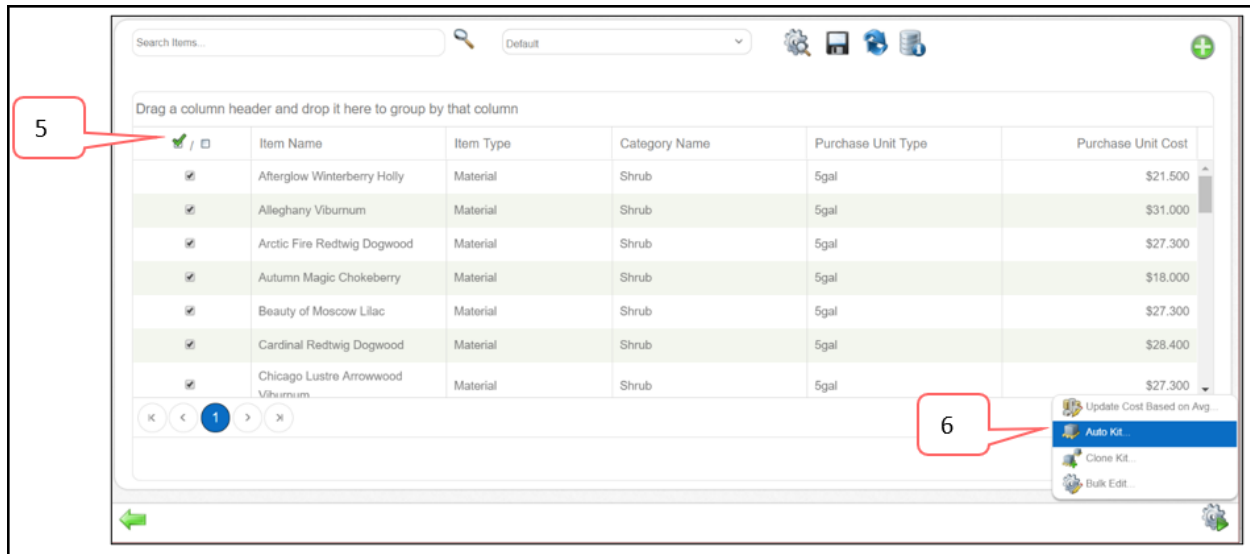
To auto-kit items in the catalog, follow these steps:



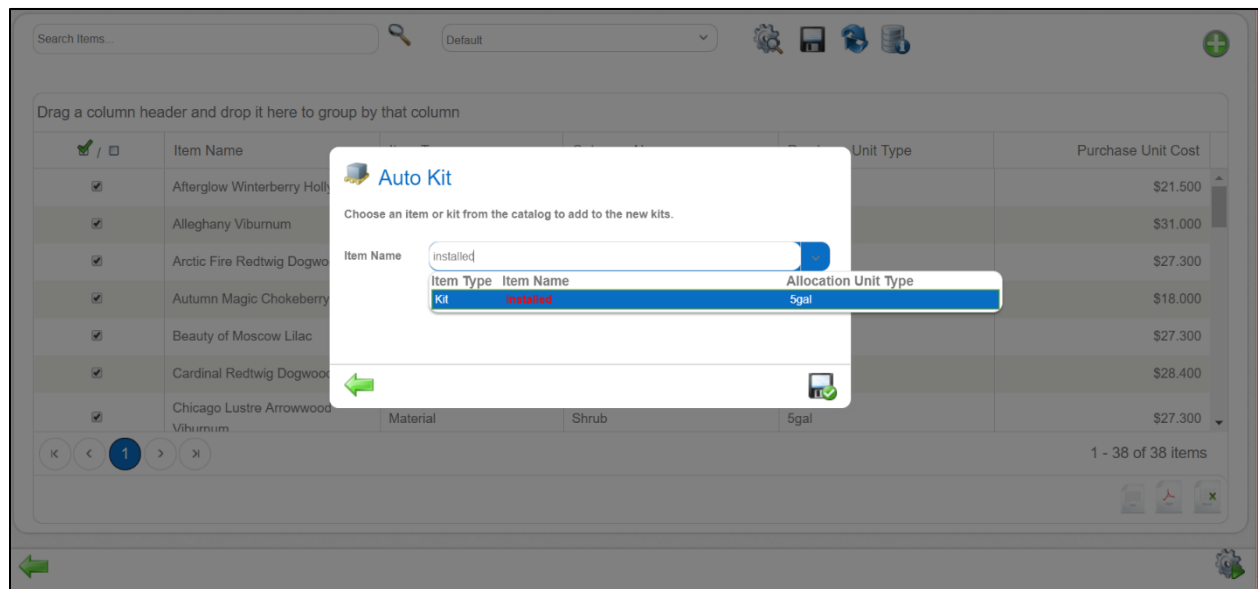
1. Select the Advanced Search.



2. In the items catalog, set the filters to only return the items that will be auto-kitted with the newly created “Installed” kit.
3. Apply filters.



4. Review the list to verify all the returned items are the desired items.
5. Select all.
6. Select Bulk Actions, the gear, and press Auto-Kit.



7. Search for and select the previously created "Installed" kit.
Note: Identify the correct allocation unit type to differentiate between the various "Installed" kits.
8. Press Save.

Kit | Dwarf Burning Bush - Installed

Item Name 9 Dwarf Burning Bush - Installed Active ☒

Alternate Name Dwarf Burning Bush - Installed Available to Bid ☒



Category Shrub Force Single Unit Pricing ☐

Unit Type 5gal Takeoff Item Select One...

Assigned Branch All Branches

Item Name	Type	Factor	Units	Invert	Waste %	Unit Cost	Extended Cost	
Dwarf Burning Bush	Material	1.00000000	5gal / 5gal	<input type="checkbox"/>	0.00%	\$34.500	\$34.50	
<u>Installed</u>	Kit	1.00000000	5gal / 5gal	<input type="checkbox"/>		\$5.130	\$5.13	
							\$39.63	

Add a new Item or Kit...

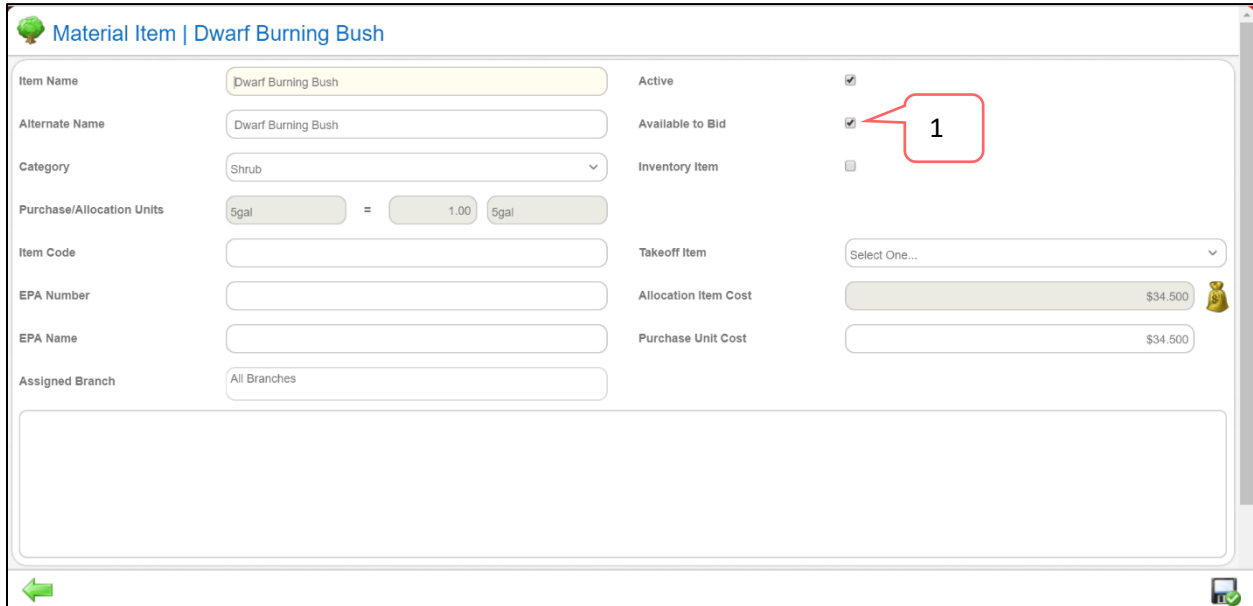
 

9. Aspire merges the plant and the installed kit. The new kit will contain the plant material and previously created “Installed” kit. This is a kit within a kit.

Note: The new kit name will be automatically generated by the system.

Note: The single plant can be marked as unavailable to bid so that estimators are forced to use the newly auto-kitted items instead of estimating the plants by themselves.

To force estimators to use the kits instead of the individual item, follow these steps:



Material Item | Dwarf Burning Bush

Item Name: Dwarf Burning Bush Active: ☒

Alternate Name: Dwarf Burning Bush Available to Bid: ☒ **1**

Category: Shrub Inventory Item: ☐

Purchase/Allocation Units: 5gal = 1.00 5gal

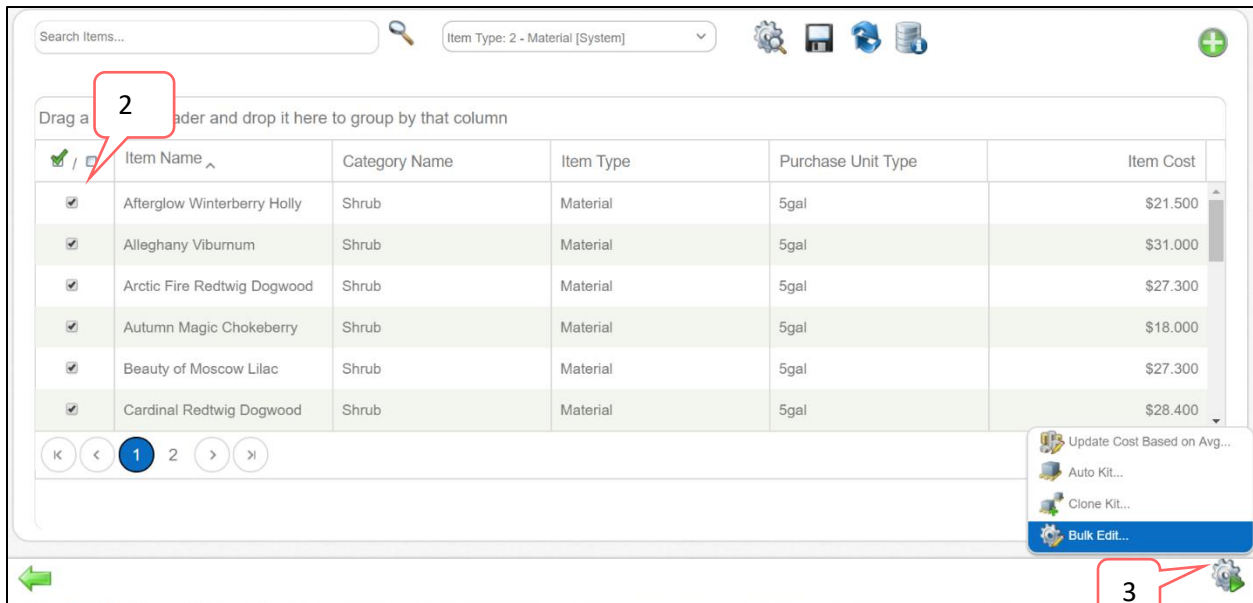
Item Code: Takeoff Item: Select One...

EPA Number: Allocation Item Cost: \$34.500

EPA Name: Purchase Unit Cost: \$34.500

Assigned Branch: All Branches

1. Remove the checkmark in the available to bid check box.



Search Items... Item Type: 2 - Material [System]

Drag a header and drop it here to group by that column

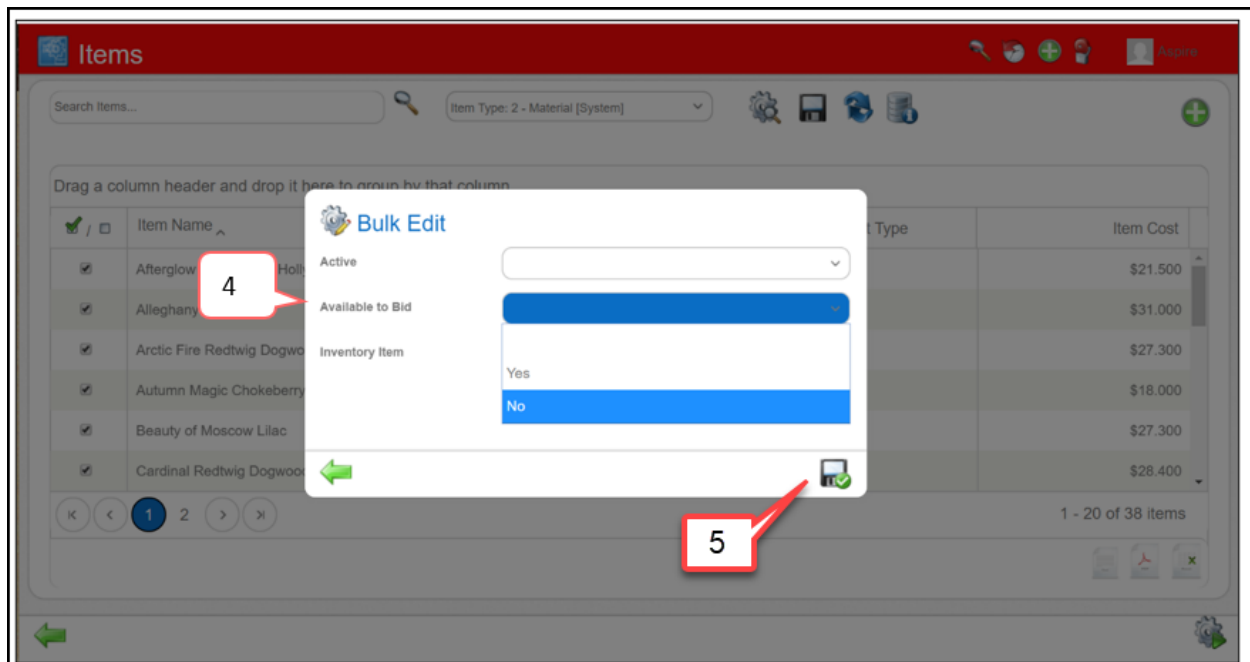
<input checked="" type="checkbox"/>	Item Name ^	Category Name	Item Type	Purchase Unit Type	Item Cost
<input checked="" type="checkbox"/>	Afterglow Winterberry Holly	Shrub	Material	5gal	\$21.500
<input checked="" type="checkbox"/>	Alleghany Viburnum	Shrub	Material	5gal	\$31.000
<input checked="" type="checkbox"/>	Arctic Fire Redtwig Dogwood	Shrub	Material	5gal	\$27.300
<input checked="" type="checkbox"/>	Autumn Magic Chokeberry	Shrub	Material	5gal	\$18.000
<input checked="" type="checkbox"/>	Beauty of Moscow Lilac	Shrub	Material	5gal	\$27.300
<input checked="" type="checkbox"/>	Cardinal Redtwig Dogwood	Shrub	Material	5gal	\$28.400

Update Cost Based on Avg...
Auto Kit...
Clone Kit...
Bulk Edit...

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2. Select the items with a checkmark so that the items can be bulk edited. This unchecks the *available to bid* checkbox across multiple items.

3. Hover over the gear and select Bulk edit.



4. Click the *Available to bid* drop down and select No.
5. Press Save.