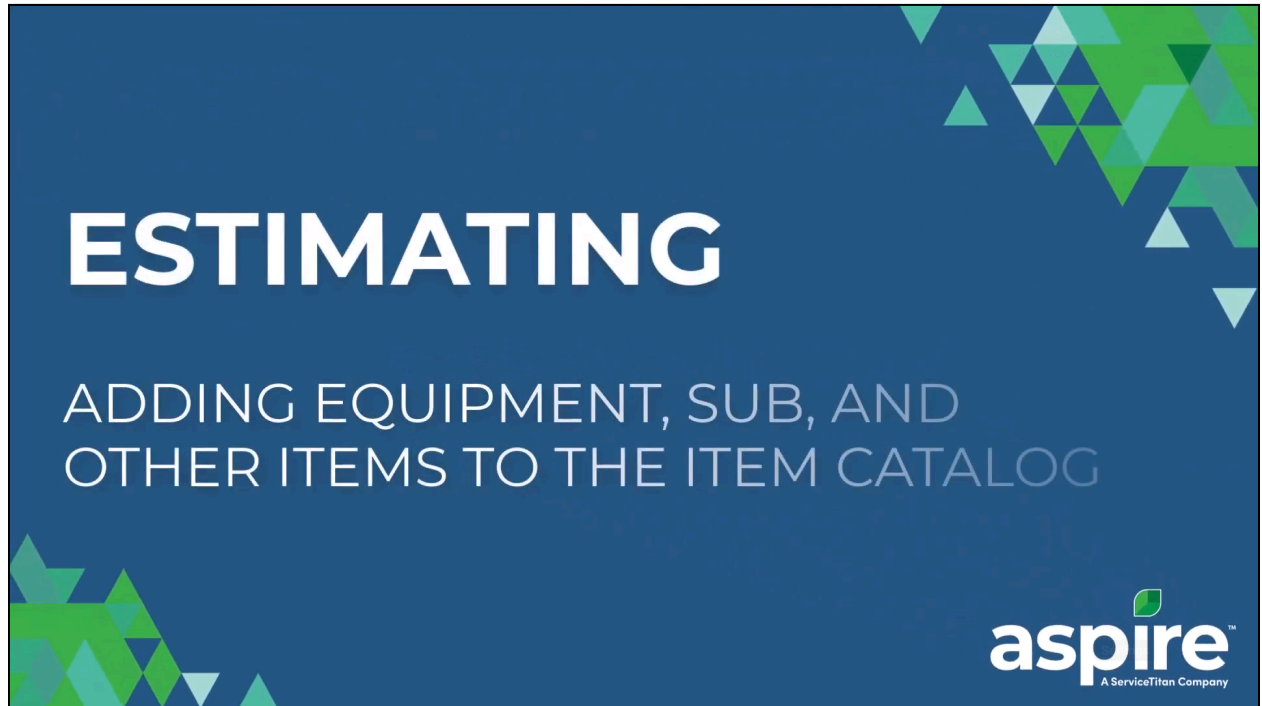


Adding Equipment, Sub, and Other Items to the Item Catalog



An equipment item is a specific type used when performing a service and needs to be **added** to your customer's estimates. Typically, these items have a cost associated with them.

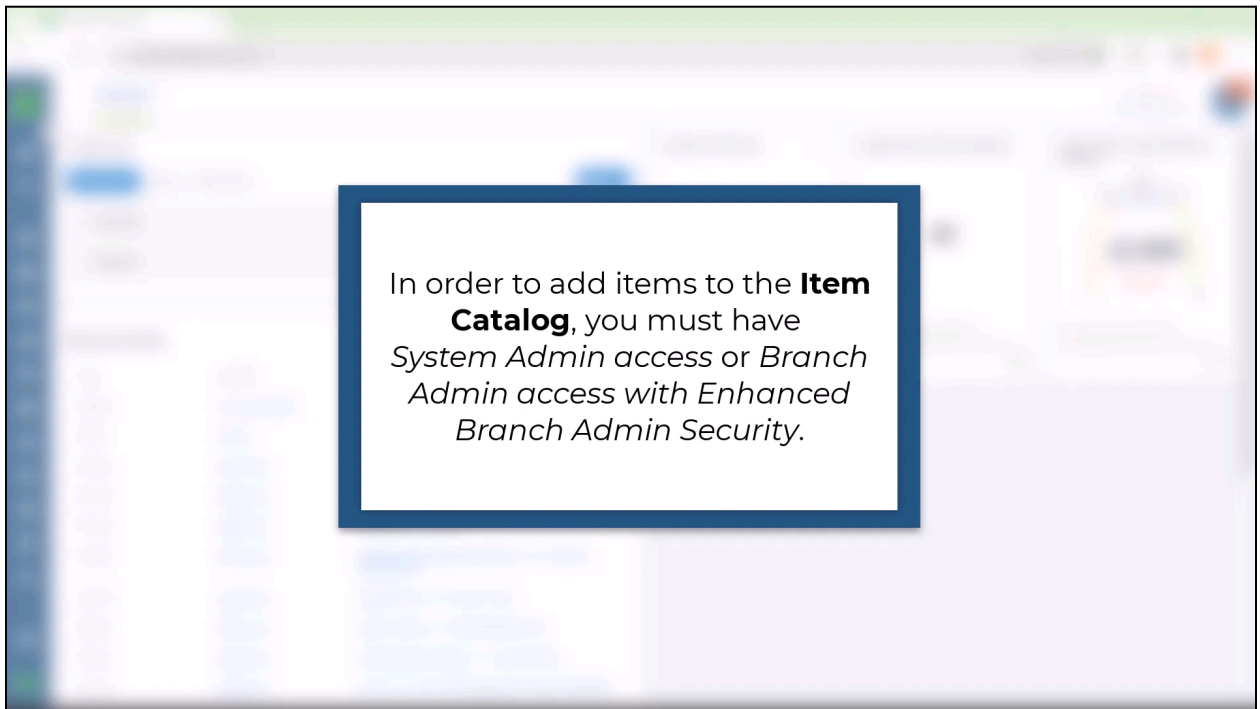
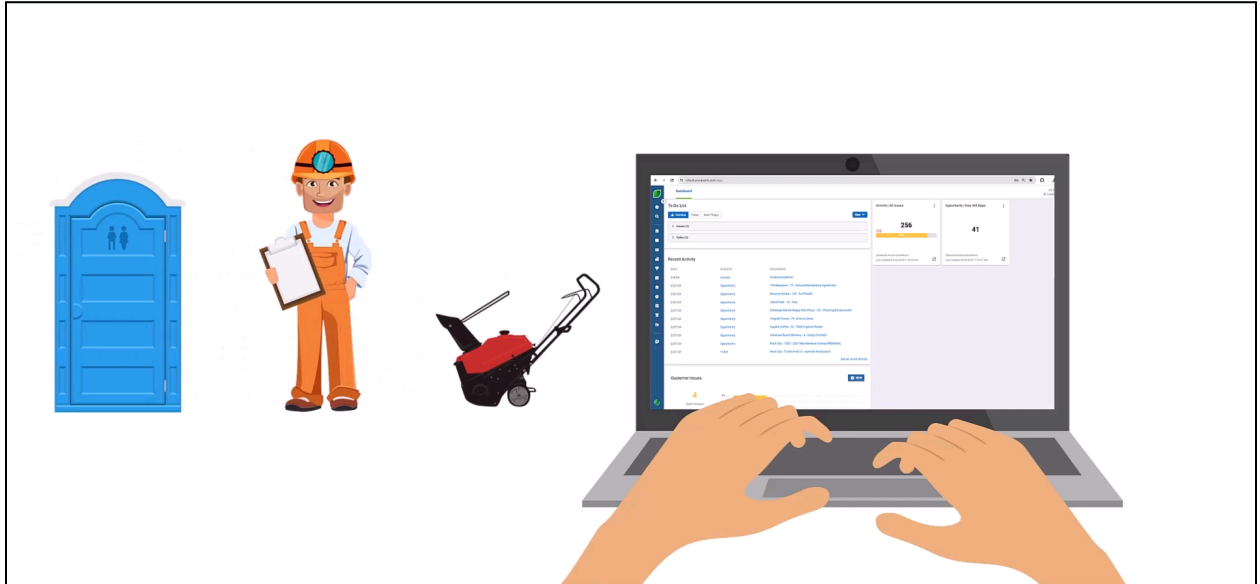
Having a set of **predefined** equipment items in your catalog provides significant benefits for accurately quoting and tracking equipment related costs.

Why is it important?

You can track equipment items from categories like:

1. Rental Equipment - You can create catalog items for rental machinery like excavators, skid steers, etc. with different rental pricing structures built into your pricing.
2. Owned Assets - Build items for owned equipment with time-based billing rates to properly capture utilization costs on jobs.
3. Key benefits include accurate cost capturing for this item type, approved vendors to ensure contracted vendors are used for these services, and historical cost data, which allows a review of past costs for better planning and negotiation.

4. Additionally, a centralized subcontractor catalog helps you with vendor tracking that makes sure only approved or contracted subs are used, allowing you to budget with accuracy and base Sub budgets on real historical data.



Summary of the Process for Item Catalog

1. Click on the profile icon, then on the Administration button.

The screenshot shows a software dashboard with a left-hand navigation menu. The 'Administration' button is highlighted with a red box. The main content area is divided into three sections: 'To Do List', 'Recent Activity', and two summary cards. The 'To Do List' section has tabs for 'Overdue', 'Today', and 'Next 7 Days', and lists 'Issues (2)' and 'Tasks (3)'. The 'Recent Activity' section is a table with columns for DATE, SUBJECT, and REGARDING. The summary cards show 'Activity | All Issues' with a count of 256 (85% progress) and 'Opportunity | New WO Opps' with a count of 41. Both cards are shared by Krista Schoellhorn and last updated on 03/20/2024.

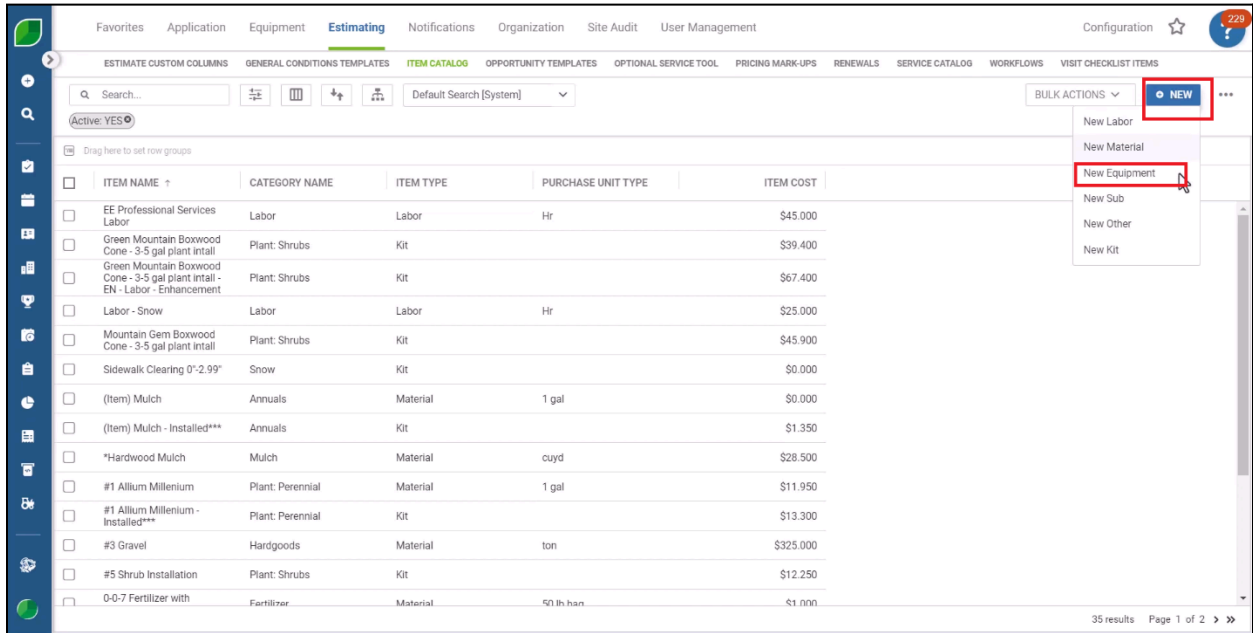
DATE	SUBJECT	REGARDING
3/20/24	Purchase Receipt	Purchase Receipt #6 - SiteOne Landscape Supply
3/4/24	Contact	Krista Schoellhorn
2/27/24	Opportunity	The Meadows - 77 - Annual Maintenance Agreement
2/27/24	Opportunity	Bloomer Estate - 129 - Turf Health
2/27/24	Opportunity	Island Park - 13 - Test
2/27/24	Opportunity	Dierbergs Market Bogey Hills Plaza - 151 - Planting Enhancement
	Opportunity	Original Towns - 79 - Evercor Snow
	Opportunity	Kayaks Coffee - 22 - T&M Irrigation Repair
	Opportunity	Anheuser Busch Brewery - 4 - Greg's Contract
	Opportunity	Rock City - 1353 - 2021 Maintenance Contract RENEWAL

2. Click on Estimating and Item Catalog.

The screenshot shows the 'Estimating' and 'ITEM CATALOG' interface. The 'Estimating' tab is selected in the top navigation bar. The 'ITEM CATALOG' tab is also selected, showing a table of items. The table has columns for ITEM NAME, CATEGORY NAME, ITEM TYPE, PURCHASE UNIT TYPE, and ITEM COST. A 'NEW' button is visible in the top right corner of the table area.

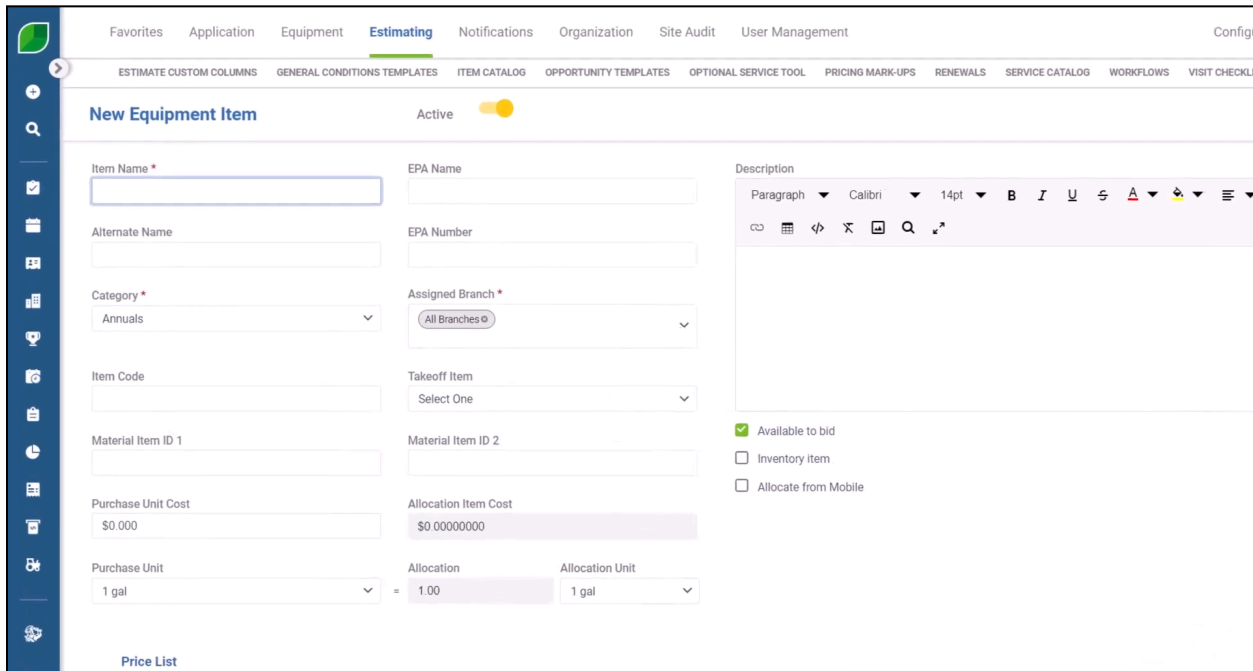
ITEM NAME	CATEGORY NAME	ITEM TYPE	PURCHASE UNIT TYPE	ITEM COST
EE Professional Services Labor	Labor	Labor	Hr	\$45.000
Green Mountain Boxwood Cone - 3-5 gal plant intall	Plant: Shrubs	Kit		\$39.400
Green Mountain Boxwood Cone - 3-5 gal plant intall - EN - Labor - Enhancement	Plant: Shrubs	Kit		\$67.400
Labor - Snow	Labor	Labor	Hr	\$25.000
Mountain Gem Boxwood Cone - 3-5 gal plant intall	Plant: Shrubs	Kit		\$45.900
Sidewalk Clearing 0'-2.99'	Snow	Kit		\$0.000
(Item) Mulch	Annuals	Material	1 gal	\$0.000
(Item) Mulch - Installed***	Annuals	Kit		\$1.350
*Hardwood Mulch	Mulch	Material	cuyd	\$28.500
#1 Allium Millenium	Plant: Perennial	Material	1 gal	\$11.950
#1 Allium Millenium - Installed***	Plant: Perennial	Kit		\$13.300

3. Click on New and then select the type you want to add. For this example, we are adding the Equipment.



4. Enter the required mandatory details like Item Name, Category, Assigned Branch, Purchase Unit, and Unit Cost.

The name that will be given to the equipment of the same name will reflect on the Customer Proposal.



5. The name given to the equipment will be reflected on the Customer Proposal

The screenshot displays a software interface for configuring equipment. At the top, there is a navigation bar with tabs for 'Equipment', 'Estimating', 'Notifications', 'Organization', 'Site Audit', and 'User Management'. Below this is a secondary navigation bar with options like 'GENERAL CONDITIONS TEMPLATES', 'ITEM CATALOG', 'OPPORTUNITY TEMPLATES', 'OPTIONAL SERVICE TOOL', 'PRICING MARK-UPS', 'RENEWALS', 'SERVICE CATALOG', 'WORKFLOWS', and 'VISIT CHECKLIST ITEMS'. The main content area is titled 'Active' and features a 'SAVE' button in the top right corner, which is highlighted with a red box. The form includes several input fields: 'EPA Name', 'EPA Number', 'Assigned Branch' (with a dropdown menu showing 'All Branches'), 'Takeoff Item' (with a dropdown menu showing 'Select One'), 'Material Item ID 2', 'Allocation Item Cost' (set to '\$75.00000000'), and 'Allocation' (set to '1.00') and 'Allocation Unit' (set to 'Hr'). A 'Description' field is also present, which is a rich text editor with a toolbar. Below the 'Description' field, there are three checkboxes: 'Available to bid' (checked), 'Inventory Item' (unchecked), and 'Allocate from Mobile' (unchecked).

6. After filling in all the necessary details, click on save.

Equipment items are crucial for accurate quoting and cost tracking in service-based businesses.

By creating a comprehensive catalog of predefined equipment, you can streamline your estimating process, ensure consistency, and make data-driven decisions.

This approach not only improves accuracy but also helps in managing vendors, budgeting effectively, and analyzing historical costs for better future planning.

Download a PDF version of the job aide [here](#).