

## **Building Assemblies: Overview**

Assemblies can be as simple as one product or as complicated as including all of the products required for an entire installation.

There are three parts to be aware of when building assemblies. The assembly itself, the assembly category where your assemblies will be stored and any special products that you need that are not already part of our product database.

Before you can start to build assemblies you need to familiarize yourself with Red Rhino's product database and determine if your assemblies will contain products that are not included in the existing Red Rhino database. I use the word existing because we are constantly adding products to the database as we receive feedback from our customers so it does change and grow over time.

All products used in assemblies must come from either a Red Rhino product catalog or from a customer's own product catalog. This will help to insure that your assemblies are structured and managed properly. If you are building an assembly and realize that you are missing a product you simply add that product to your product catalog and then return to the assembly where you left off.

Once you have completed your review of the database you then need to create a list of the products that you need to add. In addition to the product name you will need to provide a price, unless the products are strictly going to be quoted items. The price you provide can be a change order price and you can apply a discount (you set your discounts through the Generic vendor discount schedule – more on that later) to it to arrive at a competitive material price or you can use the one price fits all model and not provide a discount.

You will also need a change order labor unit and a competitive labor unit. The competitive labor unit is created using a discount off of the change order labor unit. If you use the same labor unit for both change order and competitive estimates you will only need to provide the change order labor unit and the competitive labor unit will default to match the change order labor unit.

The next step is to determine how you want to store and access your products. You will be creating a product catalog or catalogs to store your products in. If you have a handful of products you can get by with one simple product catalog. If you have a very large number of products you may want to consider breaking them up into multiple catalogs or sub catalogs under a master catalog. A word of caution – it can require numerous clicks to dig down into sub level catalogs, which slows accessing them down so don't get carried away with sub catalogs unless it is absolutely necessary.

Once you have your catalog structure ready and have completed your material list with material prices and labor units you are ready to go.

The next sets of instructions are step-by-step processes on how to do the above.

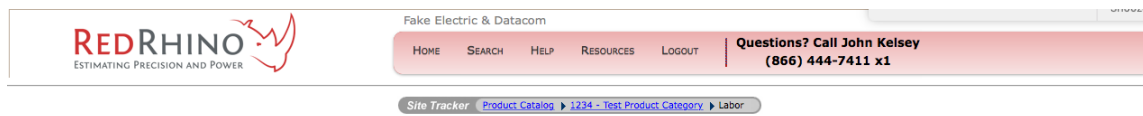
## **Let's get started:**

1. Log into Red Rhino
2. From the home page click on "Products" located on the upper right hand side of the page.
3. Then click on "Product Catalog" from the expanded Products menu.
4. Determine what you want to call your product catalog category. I recommend following this format: NUMBER – NAME OF PRODUCT CATALOG. The number should contain a few leading zeros which will place it at the top of the catalog list (0001 – NAME OF PRODUCT CATALOG) and make it easier to locate from drop down menus.
5. Click on the "New Category" button located on the upper right hand side of the page.
6. Note: Fields with a \* are mandatory and must be filled out. So every field on this screen is required.
7. Type in your desired "Category Name" in the open box.
8. The next field is "Type" and we will leave it designated with the default setting of "Other". This field is used if the products are going to be accessed using the wizards. Not a concern at this stage.
9. The last field is "Contains". If you have decided that you will have multiple product sub categories under this category you will select "Category". If your category will be populated with products that are not in sub categories then you click on the word "Category" in the box and select "Products" from the drop down menu.
10. Once you are done click on the "Save" button on the upper right hand side of the screen to finish creating your category.
11. Click on the name of the product category that you just created.
  - a. If you created one for sub categories to be under your main category you will need to click "New Category" again, name the category, leave "Type" as "Other" and then click on the word "Category" in the box and select "Products" from the drop down menu. Click "Save".
  - b. Click on the name of the product category that you just created
12. Click on the "New Product" button located on the upper right hand side of the page.
13. Type your Product name in the "Name" box.
14. You now need to create an "External Product Reference" number. Leading zeros can be helpful if you are going to be building a great number of products (example = 000001). Increasing each subsequent product number by five (000001, 000005, 00010 and so on) will allow you to insert products between ones that you already created should you find that you missed one in a sequence.
15. You can click on the "Cost Code" drop down box if you want to apply a cost code to your product.
16. Now you can click on the "Save" button located on the upper right hand side of the page.
17. Next you click on the arrow next to price.
18. Click on the "Edit" button then type in the product price in the "End Col Price" box. Note: You can set this price as a change order price and then provide a discount for it using the "Generic" vendor to generate a competitive price if you wish or simply type in a generic price that is appropriate for your needs.
19. You can also select whether the product will be priced per each "E", per hundred "C", or per thousand "M".
20. Then click on the "Save" button.
21. Along the "Site Tracker" (middle of page in blue) select the product that you just created.
22. Now you can set your labor unit. The labor unit is the amount of time it takes to install the product. Click on the "Labor" button located on the upper right hand side of the page.
23. Click on the "Edit" button located on the upper right hand side of the page.

24. Type the labor unit in the “Hours” column under the “Normal” column heading. This labor unit can be set to a change order labor unit and then discounted to a competitive level using the “Competitive Discount Percent” feature,

NORMAL			
UOM	HOURS	NET HOURS	COMPETITIVE DISCOUNT PERCENT
E	1.00	.80	20.00

25. Select the appropriate Unit Of Measure from the drop down box. Labor can be designated “E” for each, “C” for hundred or “M” per thousand using the Unit Of Measure (UOM) dropdown.
26. You have the option to set a “Competitive Discount Percent” that will discount your labor unit by the percentage that you enter. The discount will be applied when you create an estimate and labor is set to the default “Competitive” setting. Click in the appropriate “Competitive Discount Percent” box and type in the amount that you want your labor unit to be discounted for a competitive estimate. Note: The net hours will display once you click on the “Save” button. The “Net Hours” represents the competitive labor hour that will be used for a competitive estimate.
27. Click the “Save” button when you are done.
28. To build your next product click on your product category name (highlighted in blue text) located in the “Site Tracker” bar on the upper middle part the page.



28. Follow steps 12 through 28 to add additional products.

Next we will create a catalog to hold your assemblies. Based on the number of assemblies and how you wish to organize them you may simply have one catalog or several. You may also have sub catalogs.

1. From the home page click on “Assembly Catalog” located on the upper right hand side of the page.
2. Determine what you want to call your assembly catalog. I recommend following this format: NUMBER – NAME OF CATALOG. Using a number before the name allows you to easily sort the catalogs should you end up with multiple catalogs. Catalog numbers 100, 200 & 300 have already been used.
3. On the Assembly Category page you will click on the “New Category” button located on the upper right hand side of the page.
4. Note: Fields with a \* are mandatory and must be filled out. So every field on this screen is required.
5. Type in your desired “Category Name” in the open box.

6. The next field is “Type” and we will leave it designated with the default setting of “Other”. This field is used if the assemblies are going to be accessed using the wizards. Not a concern at this stage.
7. The last field is “Contains”. If you have decided that you will have multiple assembly sub categories under this category you will select “Category”. If your category will be populated with assemblies that are not in sub categories then you click on the word “Category “ in the box and select “Assembly” from the drop down menu.
8. Once you are done click on the “Save” button on the upper right hand side of the screen to finish creating your category.

Once your category is created you can begin the process of building your assemblies.

1. Click on the name of the assembly catalog that you just created.
  - a. If you created one for sub categories to be under your main category you will need to click “New Category” again, name the category, leave “Type” as “Other” and then click on the word “Category” in the box and select “Assemblies” from the drop down menu. Click “Save”.
  - b. Click on the name of the product category that you just created
2. Click on the “New Assembly” button located on the upper right hand side of the page.
3. Type your assembly name in the “Name” box. Again, using numbers ahead of your assembly name will aid in sorting. Leading zeros can be helpful if you are going to be building a great number of assemblies (example = 001- My Assembly). Increasing each subsequent assembly number by five (001, 005, 010 and so on) will allow you to insert assemblies between ones that you already created should you find that you missed one in a sequence.
4. Click on the “Save” button located on the upper right hand side of the page. Note: The other fields do not need to be addressed at this time because they are preset for the assembly and ready to go. “Unit Price Defaults” are not required unless you are building unit prices out of your assemblies. Unit prices are an advanced use of assemblies requiring a separate training session
5. Click on the “Edit Material” button located on the upper right hand side of the page.
6. Now we will use a combination of Wizards and Products to build your assembly.
7. Once you have finished populating all of your products you click on the “Save” button located on the upper right hand side of the page to complete the process.
8. To review the completed assembly click on the “Back” button located on the upper right hand side of the page.
9. Then click on the “Refresh Material” button to populate your material on this page, which will give you a total for material and labor.

To build your next assembly click on your category name (highlighted in blue text) located in the “Site Tracker” bar on the upper middle part the page.

The screenshot displays the Red Rhino software interface. At the top left is the Red Rhino logo with the tagline "ESTIMATING PRECISION AND POWER". A navigation bar includes links for HOME, SEARCH, HELP, RESOURCES, and LOGOUT. A contact box on the right says "Questions? Call John Kelsey (866) 444-7411 x1". Below this is a breadcrumb trail: "Site Tracker > Assembly Catalog > 400 - Test Assemblies > Detail". The main content area shows the assembly details for "Assembly: 001 - My Assembly(1)". On the right side of this area are buttons for "Edit", "Edit Material", and "Copy". Below the assembly name, the "Name" and "Description" are both listed as "001 - My Assembly(1)". On the right, the "Material Price" is set to "Best Discount" and the "Labor Rate" is set to "Competitive".

10. Repeat steps 2 through 9 to create additional assemblies.

Providing material price discounts to a product to create a competitive material price. This is only necessary if you price your change order material different than you do your competitive estimate material.

1. Starting from the Red Rhino home page click on "Vendors" located on the right hand side of the page.
2. Then click on "Vendor Catalog" from the expanded menu.
3. Click on "G" and then click "Generic Vendor" on the left hand side of the page.
4. Click on the "Discount" button located on the upper right hand side of the page.
5. Find and click on your product catalog in the "Product Category" drop down menu. If you used a leading zero number for your catalog it should be located at or near the top of the catalog menu.
6. Type in the discount percentage that you would like applied to the "End Col Price" in the column titled "Discount %". You will see the net price change to reflect the applied discount. The other option is to type in the "Net Price" directly and the discount will be calculated.

UOM	END COL PRICE	DISCOUNT%	NET PRICE
E	10.00	30.00	7.00
E	20.00	20.00	16.00

7. Click on the "Save" button located on the upper right hand side of the page when you are done.