

Create a Part Assembly

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Overview

Assemblies are groups of Parts referenced by a specially marked Part. They can be used to streamline the proposal building process.

This article will review:

- [Settings and Navigation](#)
- [Build an Assembly](#)
- [Add an Assembly to a Proposal](#)

Settings and Navigation

Go to [Control Panel](#) > [Parts](#) > [Edit or Add](#).



[Parts/Add-Ons](#)

Manage parts/add-ons, templates and solutions for proposals and appointments.

Build an Assembly

It takes two steps to build an assembly and both are done without leaving Parts.

1) Create your Parts

Create a new Part and give it the name that will represent the new assembly. Also create any other parts that will be included in this assembly.

Save that new Part, then click **Edit**. Now when you scroll down, you'll see an **Assembly** checkbox. Check that to open up the assembly builder section.

Assemblies

Assembly?

Marking this part as an assembly will allow this item to contain multiple other parts housed under one package.

Zero assembly item prices?

Make assembly item internal?

Use this part as the option name?

Automatically fill in the option name for assembly items using this part's name.

The **Zero Assembly Item Prices** checkbox is for when the individual parts you add have prices but you don't want to use those prices. You can then set a price for the entire assembly. If you do want to include the individual part

prices, then make sure that box is not checked and just use 0 for the price on the assembly.

Make Assembly Item Internal sets it so that the price is added to the total of the proposal but the line item does not display for the customer to see.

Use this part as the option name automatically fills in the name of this part as the name of Option on the proposal. This will group all items together into an option that can be included or declined by the customer when accepting the proposal.

2) Add Parts to Assembly

Use the search box to select new Parts to add to this assembly. The search triggers as soon as you type in at least 3 characters. Click **Add** next to the matching part you want to include. You can then put in a **Quantity**.

Existing Assembly Items

	Name	Quantity
<input type="checkbox"/>	Cabinet Hinges	<input type="text" value="4"/>
<input type="checkbox"/>	Cabinet Handles	<input type="text" value="2"/>
<input type="checkbox"/>	Cabinet Door	<input type="text" value="2"/>
<input type="checkbox"/>	Cabinet Framing	<input type="text" value="1"/>

Search

	Name
Add	Cabinet Hinges
Add	Tear Out Cabinets
Add	Cabinet Handles
Add	Cabinet Door
Add	Hinges
Add	Cabinet Framing

Synchronize Pricing?

Automatically update the quantities of line items in this assembly to match this assembly's quantity.

If the parts in this assembly have pricing that doesn't change from proposal to proposal, then make your job easier by checking the **Synchronize Pricing** checkbox.

When you're done adding the Parts you want for this assembly, just **Save** the part. Now when you reference this Part as part of a Proposal, all of the included Parts in the assembly will be brought in also.

Add an Assembly to a Proposal

When creating your proposal, type in the name of the Assembly part you've created. It will automatically fill in the additional parts and assign the quantities that you designated.

If you have selected the option to use this part as the option name, it will label every part in the assembly as a part of that option. Learn more about Proposal Options [here](#).

Option	Item	Description	Quantity	Rate	Amount
Select a template... ▾	Basic Build ▾	I'm going to build something fabulous in your abode.	1	0	\$0.00
			<input type="checkbox"/> Taxable ✎		
⋮ ×	-option-	-part- <input type="text"/> Search...	<input type="text"/>	<input type="text"/>	
Subtotal					\$0.00
Tax					<input type="text" value="--Select one--"/> ▾ \$0.00
Total					\$0.00
Labor Hours					<input type="text" value="1 hours"/>
Demand					<input type="text"/>

[Custom Fields](#)