# How to set up Material Packages/Add-ons

**Glossary:**

**Calc Base**: The program data that the program makes available to help calculate additional material take offs.  These include square footage (like square foot of roof or wall), lineal feet (like lineal feet of window trim) and quantities of things (like number of trusses or posts).  You can use these Calc Bases to calculate and estimate materials within packages.

**QTY:** This is the number that needs to be entered to estimate each material.  This is the quantity that will be used by the program to calculate the amount of material according to the Calc Base selected.  If you enter a QTY of '1' and a Calc Base of 'Square Foot of Roof Sheathing' then you will get 1 unit of material for every 1 square foot of roof sheathing. (More detail below)

**Packages**:  This is a general term that refers to the available options you can set up in the program to estimate additional materials for a quote or order.  Basically, you choose a material from your material database and define a way to calculate that material per job. Packages can contain one or many material calculations.  You can have as many or as few packages as you like.  All the terms below are types of 'Packages'. Packages are defined in the Distributor Settings and will be available/apply to all jobs in the system.

**Add-on**:  Add-ons are a type of package that <u>can be included or excluded on a job by job basis</u>.  If an Add-on is included in a job, then all materials for that <u>Add</u>-on will be added to the material list and quote price.  Note: the default is excluded, so Add-ons will need to be 'turned on' to be included in a job.

**Base Macro**: Base Macros are like Add-ons except they <u>are automatically included in every job.  These are </u>like an <u>Add-on</u> except there is no option to include or exclude per job.

**Bundles**: (Bundles and Options will be covered in more detail in another training.)  The basic definition of a bundle is an <u>Add-on</u> that is treated as a single item in terms of pricing.  So, if you create a Bundle called 'Workbench' that includes several 2x4's and nails, in terms of pricing presented on outputs, it will show a single total price for a 'Workbench' and not the individual material items that make up the <u>'Workbench'</u>.  Bundles can be used to present sales bundles to a customer as<u> a single line item price</u>. (like 'Workbench = $399.99')

**Options** : Options are like a Bundles except that an Option can be shown on outputs with a total price but it does not get added to the total price of the job/quote. This is to show prices of 'options' to customers that could be added to the job but are not currently included in the quote. Options can be excluded from a job all together, included in the quote (as a bundle) or shown as a price line item not included in the total quote price.

**Introduction:**

Packages are set up to estimate material costs using information from a job. They are very flexible which allows for different types of materials and for customers to customize material take offs. But it also means there is more than one way to set them up and therefore can take some preparation and testing.

A few considerations:
1. Do you want this material to be an option that can be included/excluded from a job (Add-on) or do you want this to automatically apply to all jobs (Base Macro)?
2. How is the material priced? Is it per roll, or by lineal foot? Is it priced as a box of nails or by individual nail?
3. Do you want the program to calculate a quantity to send out (like 3 boxes of nails) or more specific counts like 3000 nails?
4. Is the material based on lineal foot material or square footage or cubic yards etc.?
5. What materials make sense to group together under one package and which ones need to be separated into their own packages?

**Materials**

In order to estimate a material and to include a material in a package you need to have the material added to the program's material database. For all material categories besides Framing, Sheathing and Trim, you just need to determine what category you want to add the material to, create a SKU and a description and price it in a way that is consistent with how it will be estimated. The Dim 1, 2 and 3 are not used in the program for these categories, so they do not need to be filled out (or can be zero). If you need help setting up materials please call our help support.

The way a material is entered into the system will affect how an Add-on is set up. If you set the price of a material by the roll (or box or bag…) then the Add-on will need to figure how many rolls are needed for a given job. To figure this, you need to find out what percentage of a roll is used based on your selected 'Calc Base'. If you don't want the program to call out a roll or box etc. but instead just want the lineal footage or square footage of material per job, then you would price the material based on square foot or lineal foot (not per roll, box….). So, if a 100 foot roll cost $100 dollars, then the material would be priced as $1.00 to get a cost per lineal foot. So, the way a material is priced needs to coordinate with the way you want to report and estimate the material.
Following are some examples to help explain:

**Example 1:  Estimate per roll based on Lineal foot**

Let's say you use a roll on waterproof flashing for all windows.  You need to have a material in your database to use.  In your database, you add a 33' roll of flashing <u>priced per roll</u> in your 'Window Hardware' category.  In this case, you want to figure out how many rolls to send out to any given job.  So you create a 'Base Macro' to account for this flashing material.  In this case, the best Calc Base available is Lineal Foot of Window Trim.  So, how do we figure out how many 33' rolls we need per job?

If you want to use 1 lineal foot of flashing for each 1' of window trim then you use this formula:

1 lft divided by 33' of flashing = .0303,  .0303 is the number that you should enter into the Qty field when you add this material from your catalog to a package.



This means for every lineal foot of window trim for a given job, you will get 1 foot of window flashing, **but** it will only report the number of rolls required for the material take off.  If a job has less than 33 lineal foot of window trim then one roll of 'Roll Flashing 33'' will be included and priced on the material take-off.  As the lineal feet of window trim increases so does the number of rolls, but only when it reaches a point that requires a new roll.  So, 33' will require 2 rolls (the program will round up when exactly 33').  65' will require 2 rolls.  66' will require 3 rolls etc.

You can reduce the material called out, or give a buffer by adjusting the numbers in the calculation.  If you only want flashing on ½ the window then you can change the first number in the equation.  So, instead of 1/33, you could use .5/33 = .015.  If you enter this in the QTY field then you will get half as many rolls (depending on the actual window trim lineal footage).

If you want to make sure you get enough then you can reduce the amount of coverage per roll.  So, in this case even though we have 33' in a roll, I am going to use 30' in the equation.  This will give a buffer.  So, 1/30=.0333.  In this case, I will get a new roll every 30 lineal foot of window trim (even though the roll will cover 33' feet).

This is one example, but the same principles can apply to any type of material where you need to find the quantity of rolls, or bags or boxes to send out per lineal foot of something.

**Example 2:  Priced per lineal foot (not per roll,box…)**

Let's assume instead of figuring out the number of rolls to send out, you want a number of actual lineal footage required and priced per lineal foot (not per roll).  In this case, you would set the cost of the material in your material catalog by the cost of material per lineal foot in a roll.  If a roll of 100' costs $252.00 then the cost in your material catalog would be $2.52 per lineal foot.  In this case, you want one lineal foot of flashing for every lineal foot of window trim.  So, you would just use 1 as the Qty factor.



*The 100' roll is priced per lineal foot.*

In the above example, the Qty of '1' means I want 1 lineal foot of weather strip for every lineal foot of overhead trim. The results per job on the material take-off will show the actual lineal footage required and it will give a price of the material per lineal foot. If you use 1.1, it will give a bit more per lineal foot of trim. If you use .9, it will give slightly less per linear foot of trim.

**Example 3:  Materials based on Square Footage**

Using square footage as a Calc Base is similar to using lineal footage, except you need to figure out the total coverage of the material. For example, let's say you use a 4x8 insulation panel to insulate walls and you want the program to figure out how many panels you need for any given job. In the material database, you would add a 4x8 insulation panel with the cost/price per panel. Under packages, you would create an Add-on to account for this material. In this case, square footage of wall sheathing is a good Calc Base to use to figure out how many sheets are required. To do this you need to figure out the coverage of one sheet, so 4x8 = 32 square foot per panel. Then you need to tell the program how much of a sheet is required for one square foot of wall sheathing. This calculation is 1/32 =.03125. So you would enter .03125 as the Qty when you create the Add-on:
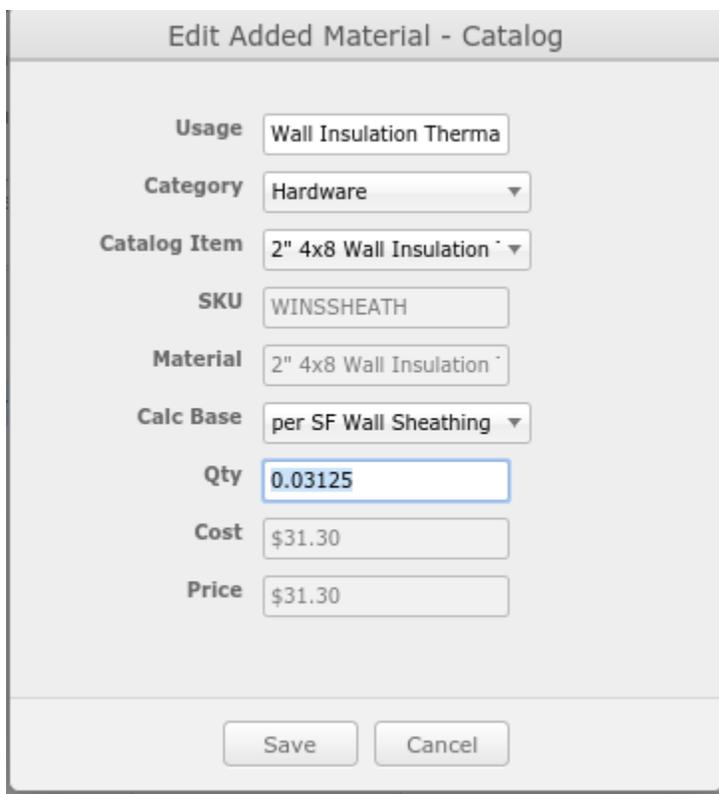


In this example, the program will calculate how many sheets are required for any given job based on the job's total square foot of wall sheathing. The program will round up, but basically, for every 32 square foot of wall sheathing, the program will report 1 sheet of wall insulation. 330 square feet of wall sheathing would report 11 sheets.

If you ~~you~~ don't want a quantity of sheets recorded then you can price the sheet per square foot in the material database (so 32 divided by cost per sheet) and then use '1' as the Qty. This would report the number of square foot of wall sheathing and calculate the cost/price based on the square footage.  See the lineal foot example (2) for more information.

**Example 4:  Finished floor cubic yards to square foot**

For slabs, since we are using the square footage of floor in the program, we need to convert cubic yards to square feet.  You could create a material under the Foundation category of '1 cubic yard of concrete' with a cost/price for 1 cubic yard of concrete.  (You could also create a 'material' in your labor category of the price a subcontractor would charge per cubic yard of finished floor.)

For a 4" slab, I used the conversion of 1 cubic yard = 81 square feet.  In order to get the Qty to convert 81 square feet into 1 square feet, I divided 1 by 81.  So, 1/81 = .012345.  This is the conversion the program needs to figure out how many square foot of floor equals 81 square feet (which equals one cubic yard of concrete).  It looks like this:



Using this calculation, the program will report 1 cubic yard (which is priced at $100) for every 81 square foot of floor.

For a six inch slab, I did the same thing except the numbers are different for the conversion. I used 1 cubic yard = 54 square feet. So to find out how many square feet equal 1 cubic yard, I divided 1/54 = .0185.



### Example 5:  Screws and Nails

Screws and nails follow similar principles as above.  If you want a count of nails per lineal foot or square foot of something then the calculation is pretty easy.  A QTY of 1 will give you 1 nail for each square/lineal foot according to the Calc Bases selected.  You can increase or decrease the amount as you like.  Calculating nails per square foot to get a count on the number of boxes is a bit more difficult.  Here is a formula that you can use:

1.  1 DIVIDED BY # in box(or bag, pound etc..) = **x**
2.  # of nails desired per sqft. (this could be 1, or .5, or 10) TIMES .001 = **y**
3.  **x + y**
4.  = QTY to enter

1.  So, if there are 1000 nails in a box then 1/1000 = .001
2.  If you want 3 nails for every square foot then 3  * .oo1 = .003
3.  Add .001 + .003 = .004
4.  Enter .004 as the QTY for the nail calculation:

**Edit Added Material - Catalog**

| Field | Value |
|---|---|
| Usage | Girt Nails Exterior |
| Category | Fastener |
| Catalog Item | Gun Nails Box 3" |
| SKU | NailBox3" |
| Material | Gun Nails Box 3" |
| Calc Base | per SF Wall Sheathing |
| Qty | 0.004 |
| Cost | $69.39 |
| Price | $69.39 |

This will calculate 3 nails per every square foot of wall sheathing and will give you 1 box for any count below 1000 nails in a job, 2 boxes for 1000+, 3 boxes for 2000+ etc.

If you have a box of 500 then here are the calculations:
1/500 = .002
3 nails/sqft * .001 = .003
.002 + .003
QTY =.005

| Package Name | Nails | | | | | Save Canned |
| Package Type | Base Macro ▼ | | | | | |
| Info Text | All Nails. | | | | | |

Define the products in the list below that will be added to the job when this Package is selected
- or - leave the list below blank to define a manual checklist item that needs to be manually added to the job

➕ Add Misc  ➕ Add Catalog  ✏ Edit  ✖ Delete  |  ⌃ ^ ⌄ ⌄  |  Copy ▾  Move ▾

| Usage | Sku | Material | Length | Calc Base | Qty |
|---|---|---|---|---|---|
| Girt Nails Exterior | NailBox3" | Gun Nails Box 3" | | SFWall | 0.004 |
| Purlin Nails | NailBox3" | Gun Nails Box 3" | | SFRoof | 0.004 |
| Skirt Board Nails | PNail35GIV | Pole Nail 3 1/2 Galv | | LFBase | 0.018 |
| Truss to Post Nails | PNail4 | Pole Nail 4" | | Truss | 0.3 |
| Header Nails | PNail4 | Pole Nail 4" | | Post | 0.004 |
| Windows Nails | CapNail1.51 | Cap Nails 1 1/2 #1 | | Window | 0.096 |

*Example of a nail Base Macro with multiple types of nails calculated in different ways.*

If you want a count of nails or screws (and not per box) then you would price by individual nail in your material catalog and use a QTY of 1 to get one nail per each square foot.  Again, to increase the quantity you could use a QTY of 1.1 per square foot or to decrease you could use .9 (or any other number depending on how you want to calculate the count of nails).

**Conclusion:**

Packages take some preparation and may require some trial and error testing.  You can model a base or a 100x100 model and check the Material Lists and outputs and change and adjust the materials, pricing or the packages to get numbers that work for your purposes.  If you need additional help, please call our help line or send us an email.  Also, we can add more Cacl Bases, so if you do not see a Calc Base that you would like to use then please let us know.

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