

CLICK ON ERROR CODE YOU NEED AND IT WILL TAKE YOU TO THE APPROPRIATE SOLUTION.

[ASSEMBLY \(Create From Database\)](#)

[ASSEMBLY \(Create From Estimate\)](#)

[ASSEMBLY \(Edit An Existing Assembly\)](#)

[ASSEMBLY \(Transfer Assembly To An Estimate\)](#)

[ASSEMBLY \(Print Assembly Contents List\)](#)

ASSEMBLY (Create From Database)

SEE ALSO: ASSEMBLY - Create from Estimate

ASSEMBLY - Edit An Existing Assembly

ASSEMBLY - Transfer Assembly To An Estimate

PROBLEM: User wants to create and save an Assembly in the HomeTech Advantage Cost Estimator program.

SOLUTION: There are two methods you can use to create an assembly in the HomeTech Advantage Cost Estimator version 4.0.

An assembly can be created by: (1) Using line items from the database, or (2) using line items from an existing estimate.

It should be noted that assemblies are specific to the various costbooks. This means that Remodeling & Renovation assemblies can only have items from the Remodeling & Renovation costbook. To create a new assembly using the database, complete the following steps:

* Open the HomeTech Advantage Cost Estimator program. You can create an assembly using this method with or without an estimate open.

* Choose the costbook from which you want to create an assembly from (Example: Remodeling & Renovation Costbook from the vertical menu on the left). This will take you to the database window.

- * From the database window, choose the ASSEMBLIES pull-down menu.
 - * Choose EDIT ASSEMBLIES to display the Assembly Maintenance window.
 - * Choose the ASSEMBLY TYPE (Example: Additions, Basements, etc.) from the Description box in the upper left of the Assembly Maintenance window.
 - * Choose the ADD ASSEMBLY button to create a new assembly.
 - * ENTER THE TITLE of your new assembly in the Assembly Title box in the lower left of the Assembly Maintenance window.
 - * Choose the TAG & COPY button to add items to your assembly. This will take you to the database window. TAG the items you want to add into your assembly.
 - * Choose TRANSFER TO ASSEMBLY when you are finished tagging items. This will add the tagged items to your assembly. This will take you back to the Assembly Maintenance window and you will now see the items included in your new assembly.
 - * When you are finished adding items to your assembly, choose EXIT to save any changes and to exit the Assembly Maintenance window.
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ASSEMBLY (Create From Estimate)

SEE ALSO: ASSEMBLY - Create from Database
ASSEMBLY - Edit An Existing Assembly
ASSEMBLY - Transfer Assembly To An Estimate

PROBLEM: User wants to create and save an Assembly in the HomeTech Advantage Cost Estimator program.

SOLUTION: There are two methods you can use to create an assembly in the HomeTech Advantage Cost Estimator. An assembly can be created by: (1) Using line items from the database, or (2) using line items from an existing estimate.

It should be noted that assemblies are specific to the various costbooks. This means that Remodeling & Renovation assemblies can only have items from the Remodeling & Renovation costbook. To create a new assembly from an existing estimate, complete the following steps:

- * Open the HomeTech Advantage Cost Estimator program.
- * Open the estimate from which you want to create an assembly from (Choose FILE pull-down menu, choose OPEN, choose/highlight the estimate title, choose OK).
- * In the estimate window, expand your estimate to display the line items (Choose EXPAND GRID button at the bottom of screen).
- * Choose/Highlight the line items in your estimate that you want to include in a new

assembly. You can choose multiple items by holding the CONTROL (CTRL) button on your keyboard while choosing the items. You can select a range of items by holding the SHIFT button on your keyboard while choosing the items.

- * When you have finished selecting the line items from your estimate, RIGHT CLICK somewhere on the highlighted area.
 - * Choose CREATE ASSEMBLY from the pop-up menu.
 - * Enter your new ASSEMBLY NAME.
 - * Choose/Highlight the category where you want to save the assembly into (Example: Additions, Baths, etc.).
 - * Choose the CREATE button to create the assembly. Choose EXIT to cancel.
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ASSEMBLY (Edit An Existing Assembly)

SEE ALSO: ASSEMBLY - Create From Estimate
ASSEMBLY - Create From Database
ASSEMBLY - Transfer Assembly To An Estimate

PROBLEM: User wants to edit an existing assembly in the HomeTech Advantage Cost Estimator program.

SOLUTION: An existing assembly includes the following:

1. The default assemblies created by HomeTech that load into the program when you install the software.
2. Any assembly which you have created and/or modified.

To edit an existing assembly in the HomeTech Cost Estimator program, complete the following steps:

- * Open the HomeTech Advantage Cost Estimator program. You can edit an assembly using this method with or without an estimate open.
- * Choose the costbook from which you want to edit an assembly from (Example: Remodeling & Renovation Costbook from the vertical menu on the left). This will take you to the database window.
- * From the database window, choose the ASSEMBLIES pull-down menu.
- * Choose EDIT ASSEMBLIES to display the Assembly Maintenance window.
- * Choose the ASSEMBLY TYPE (Example: Additions, Basements, etc.) from the Description box in the upper left of the Assembly Maintenance window.
- * Choose the ASSEMBLY NAME (Example: Basement Refinish, etc.) from the Description box in the middle left of the Assembly Maintenance window. You will now

see the items included in this particular assembly in the large white box on the right-side of the Assembly Maintenance window.

* You can now edit the assembly by adding or removing items to the assembly. To add items to the assembly, choose the TAG AND COPY button on the right-side of the Assembly Maintenance window. This will take you to the Database window. Tag the items you want to transfer into the assembly.

Choose TRANSFER TO ASSEMBLY.

These items are now transferred to the assembly and you will see these added items in the large white box on the right-side of the Assembly Maintenance window. To delete items from the assembly, choose/highlight the line item you want to delete in the large white box on the right-side of the Assembly Maintenance window.

Choose DELETE on your keyboard. You have to delete line items from an assembly one at a time. Repeat these steps as necessary until the assembly is modified to your satisfaction.

ASSEMBLY (Transfer Assembly To An Estimate)

SEE ALSO: ASSEMBLY - Create from Estimate

ASSEMBLY - Create From Database

ASSEMBLY - Edit An Existing Assembly

PROBLEM: User wants to transfer an assembly into an open estimate in the HomeTech Advantage Cost Estimator program.

SOLUTION: To transfer an assembly into an estimate in the HomeTech Advantage Cost Estimator program, complete the following steps:

* Open the HomeTech Advantage Cost Estimator program.

* Open an existing estimate (Choose FILE pull-down menu, choose OPEN, choose/highlight the estimate, choose OK), OR create a new estimate (Choose FILE pull-down menu, choose NEW and setup the new estimate with the appropriate data). The estimate must have at least one phase in order to be able to transfer assemblies and/or line items into it.

* With your estimate open, choose/highlight an item or line in the phase in which you want to transfer the assembly. If there is only one phase in the estimate you do not need to concern yourself with choosing the phase as there is only one possible phase to transfer the assembly into. If there are multiple phases in the estimate, you have to select a line in that phase to denote that you are working in that phase, and that will be the phase the assembly gets transferred into.

* From the horizontal menu at the top of the estimate window, choose TRANSFER ASSEMBLY. This displays the Assembly List window.

- * In the Assembly List window, choose the ASSEMBLY TYPE from the box on the left-side of the window (Example: Additions, Decks, etc.).
 - * Choose the ASSEMBLY NAME from the Assembly List box on the right-side of the window.
 - * Choose TRANSFER TO PHASE to transfer this assembly into your estimate. Choose EXIT to cancel the transfer.
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ASSEMBLY (Print Assembly Contents List)

SEE ALSO:

- ASSEMBLY – Create From Estimate
- ASSEMBLY – Create From Database
- ASSEMBLY – Transfer Assembly To An Estimate

PROBLEM: User wants to print a list of the line item contents for a particular assembly in the HomeTech Advantage Cost Estimator program.

SOLUTION: To print a line item list for any assembly in the HomeTech ADVANTAGE Cost Estimator program, complete the following procedure:

- * Open the HomeTech ADVANTAGE Cost Estimator program.
- * Choose the CostBook from which you want to edit an assembly from (Example: Remodeling & Renovation CostBook from the vertical menu on the left). This will take you to the database window.
- * From the database window, choose the ASSEMBLIES pull-down menu.
- * Choose PRINT ASSEMBLIES to display the Assembly List window.
- * Choose the ASSEMBLY TYPE (Example: Additions, Basements, etc.) from the Assembly Types box in the upper left of the Assembly List window.
- * Choose the ASSEMBLY NAME (Example: Basement Refinish, etc.) from the Assembly List box on the right-side of the Assembly List window.
- * Choose the PRINT button to print the content list of this particular assembly, or choose EXIT to cancel the print.