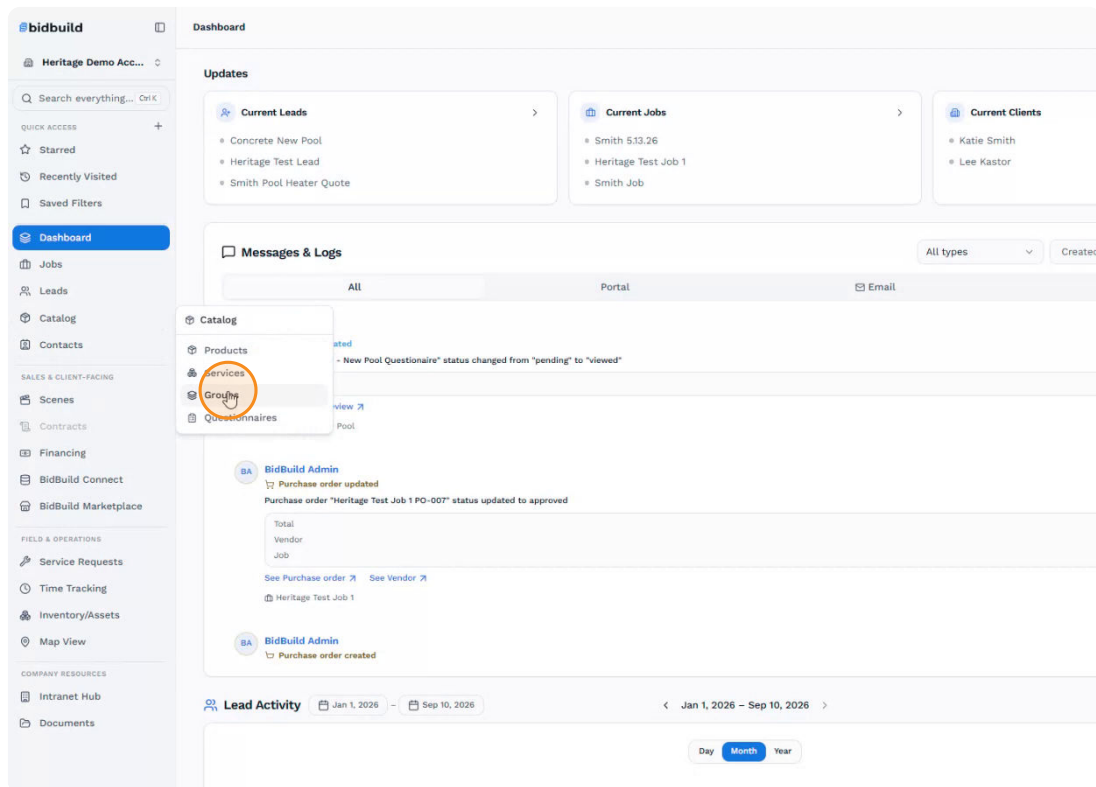


Managing Group Templates in the Catalog

This document explains how to view, edit, price, and organize group templates in the catalog, including adding and removing items, working with subgroups, managing markups and options, and creating or duplicating group templates for reuse.

Step 1: Navigate to the Group Templates in the Catalog

Go to the **Catalog** and open the **Group** section to access your group templates.

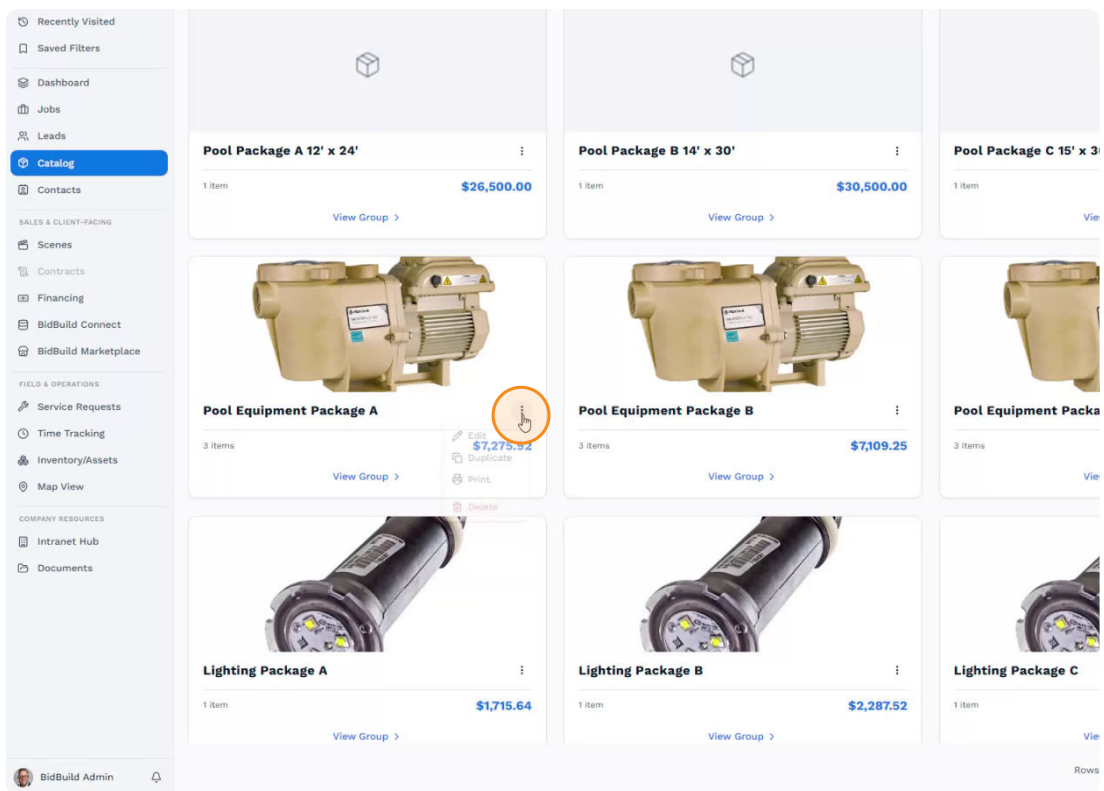


Here you will see a list of all your group-templated items. Group templates can contain a mix of products and services, allowing you to combine multiple items into a single group package.

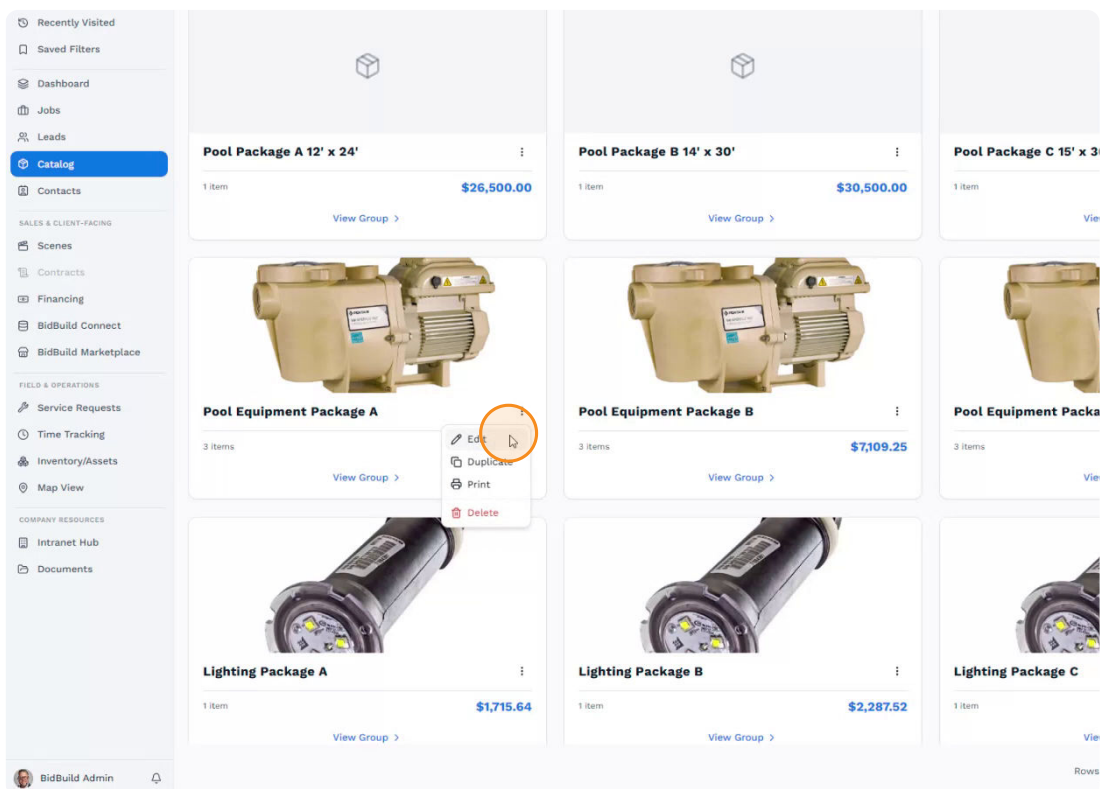
Step 2: Open and Edit an Existing Group Template

Select a group template from the list to review it.

For example, select the desired item.



Choose **Edit** to open the template for modification.



Inside the editor, you can see all items associated with this group.

Group Template "Pool Equipment Package A"

TEMPLATE ITEMS 3 Items - \$1,275.92

Manage Options Hide Fields Add Subgroup Catalog

NAME	PHASE	QTY	UNIT	COST	CONT.	TOTAL
Pentair WhisperFlo VST Variable Speed Pool Pump, 2.6 THP, 115/208-230 V, 50/60 Hz 011533	Equipment	1	EACH (EA)	\$ 2046.5	\$ 100	\$2,146.27
Pentair FNS Plus Filter Fiberglass D.E. Filter, 60 sq. ft, 21.5" Diam, 120 GPM, 86,400 gallons 180009	Equipment	1	EACH (EA)	\$ 1703.5	\$ 85	\$1,788.97
Pentair IntelliCenter iSPS Pool & Spa Bundle Control System, Loadcenter (No Salt), 2 IntelliValves 521907	Equipment	1	EACH (EA)	\$ 3181.6	\$ 159	\$3,340.68

Q Search

Produ
Elect
Hayv
Hayv
Pent
Pent
Hayv
Hayv
Hayv
Pent
Pent
Steg
Servic
Plurr
Freig
Perm
Elect
TRI-
Vanir
Freig

When quoting, you can add this single group to your quote, and it will automatically include the full combination of products and services contained in the group.

Step 3: View Group Details and Print Client-Facing Sheets

While in the **Group** section, you can open a group to view its details.

Recently Visited
Saved Filters
Dashboard
Jobs
Leads
Catalog
Contacts
SALES & CLIENT-FACING
Scenes
Contracts
Financing
BidBuild Connect
BidBuild Marketplace
FIELD & OPERATIONS
Service Requests
Time Tracking
Inventory/Assets
Map View
COMPANY RESOURCES
Intranet Hub
Documents

BidBuild Admin

Pool Package A 12' x 24'

1 item \$26,500.00

[View Group >](#)

Pool Package B 14' x 30'

1 item \$30,500.00

[View Group >](#)

Pool Package C 15' x 30'

1 item

[View Group >](#)

Pool Equipment Package A

3 items \$7,275.92

[View Group >](#)

Pool Equipment Package B

3 items \$7,109.25

[View Group >](#)

Pool Equipment Package C

3 items

[View Group >](#)

Lighting Package A

1 item \$1,715.64

[View Group >](#)

Lighting Package B

1 item \$2,287.52

[View Group >](#)

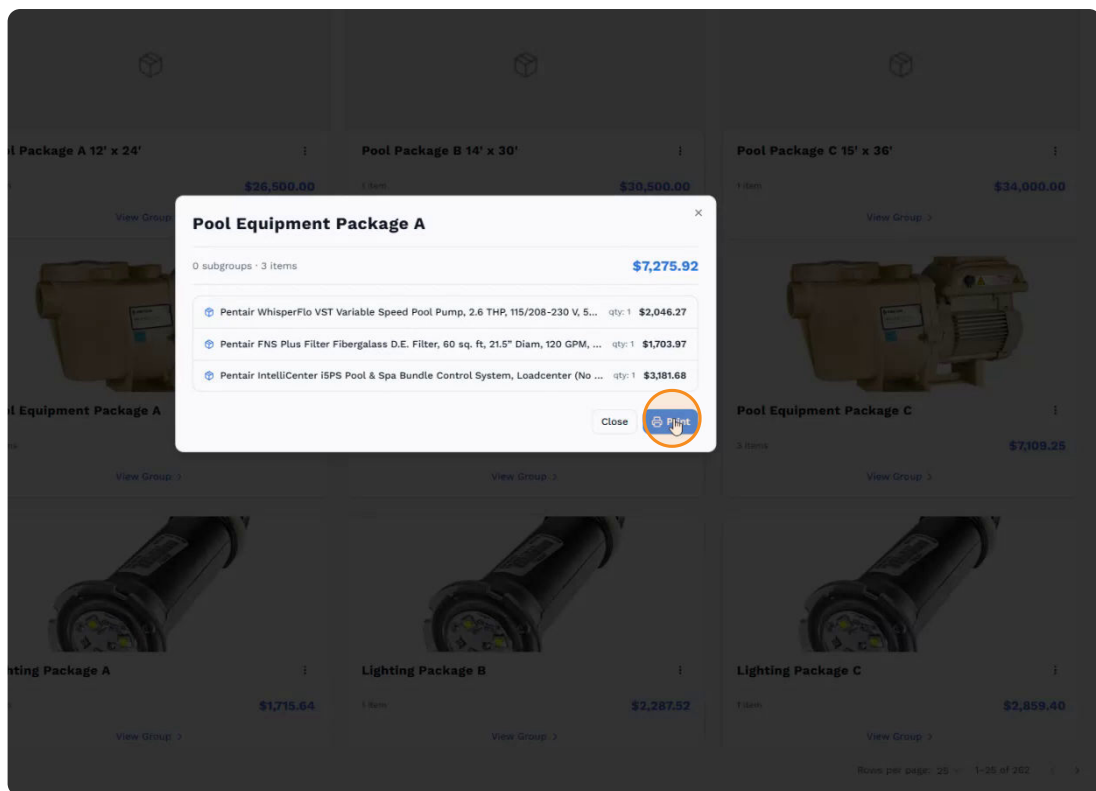
Lighting Package C

1 item

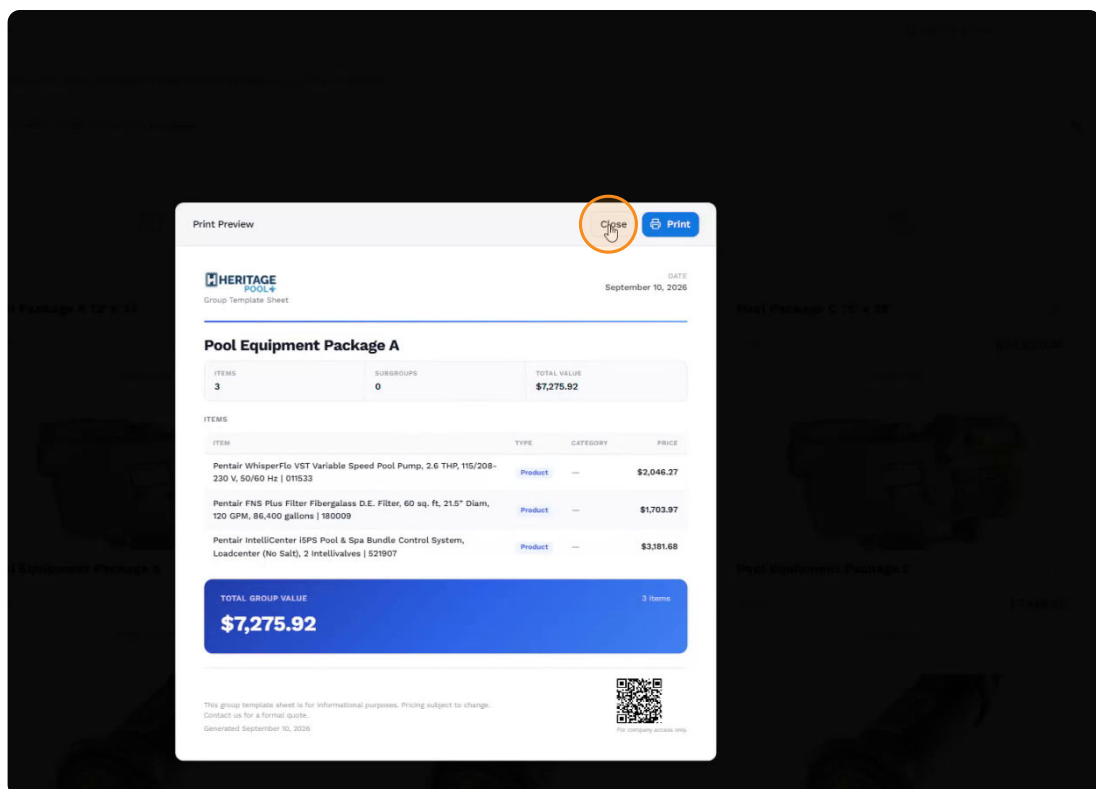
[View Group >](#)

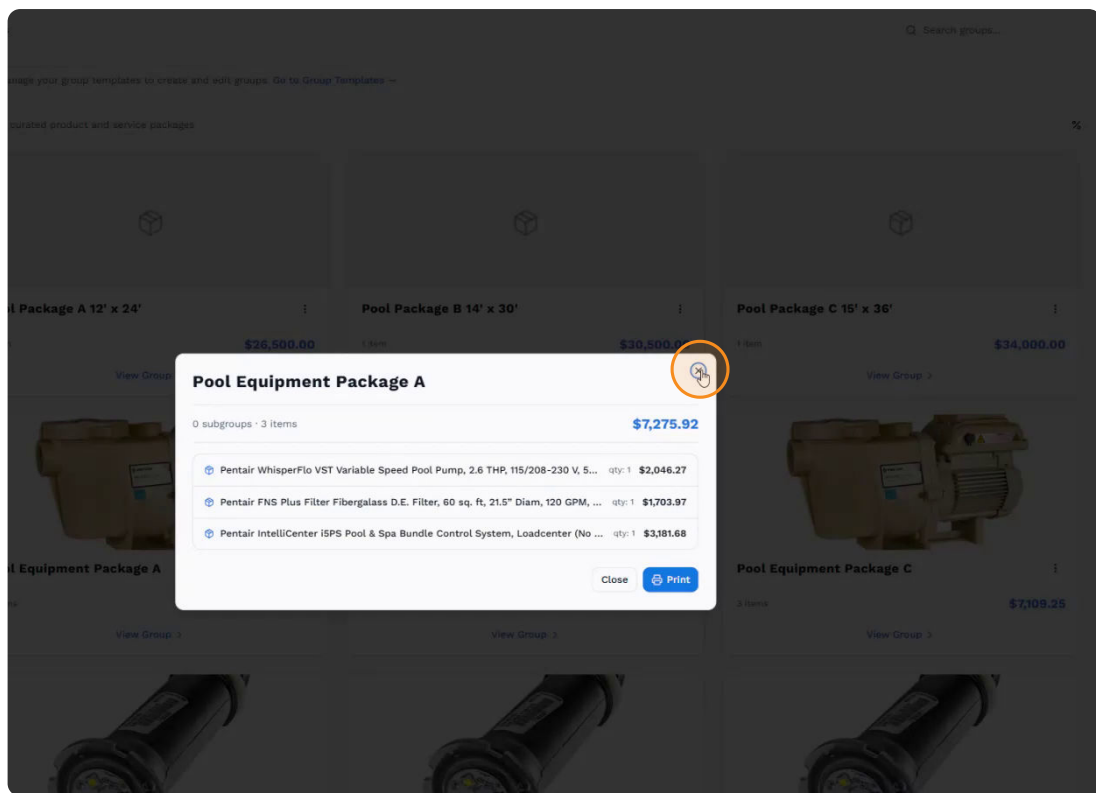
Rows

From here, you can also print a custom sheet that you can share with clients.

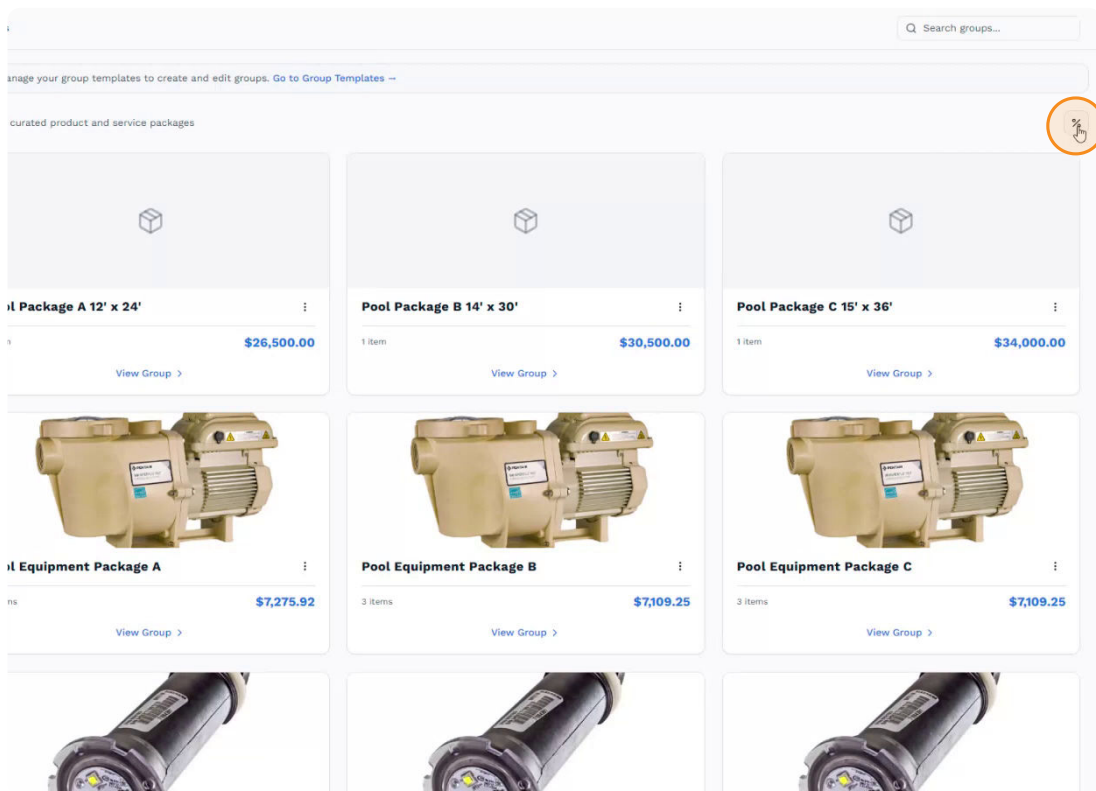


If you want to configure margins so clients do not see your markup, use the markup controls on the right side.

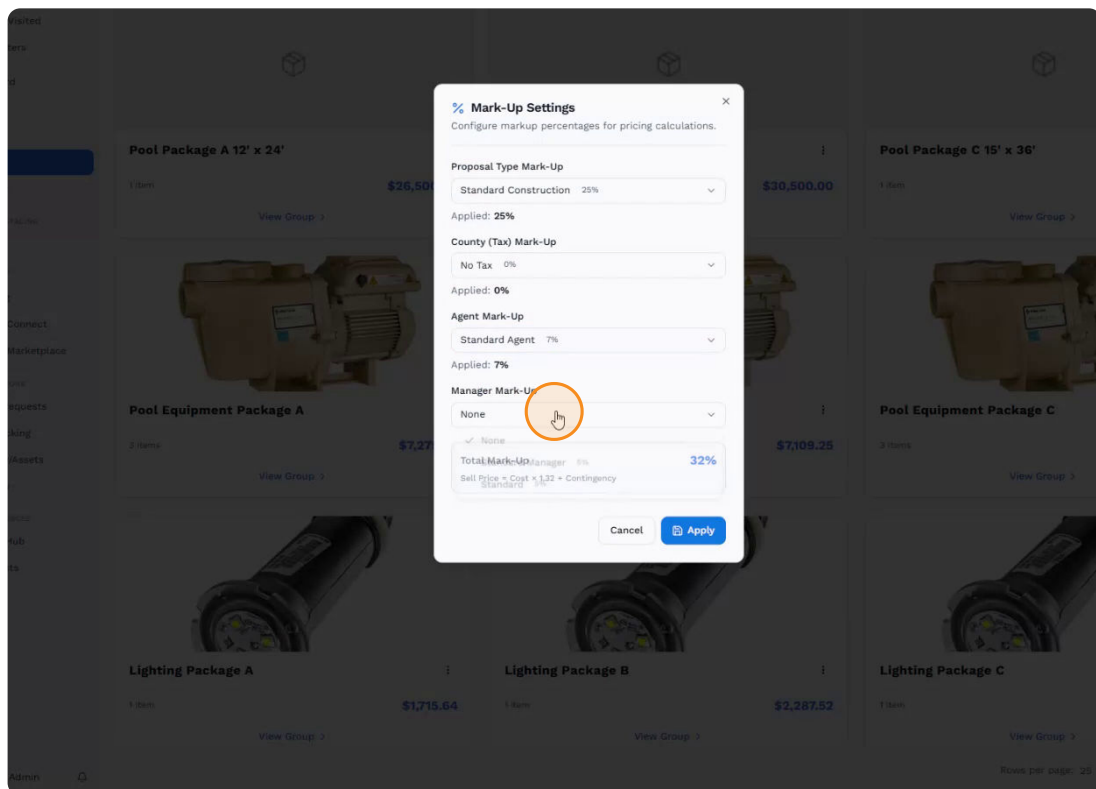
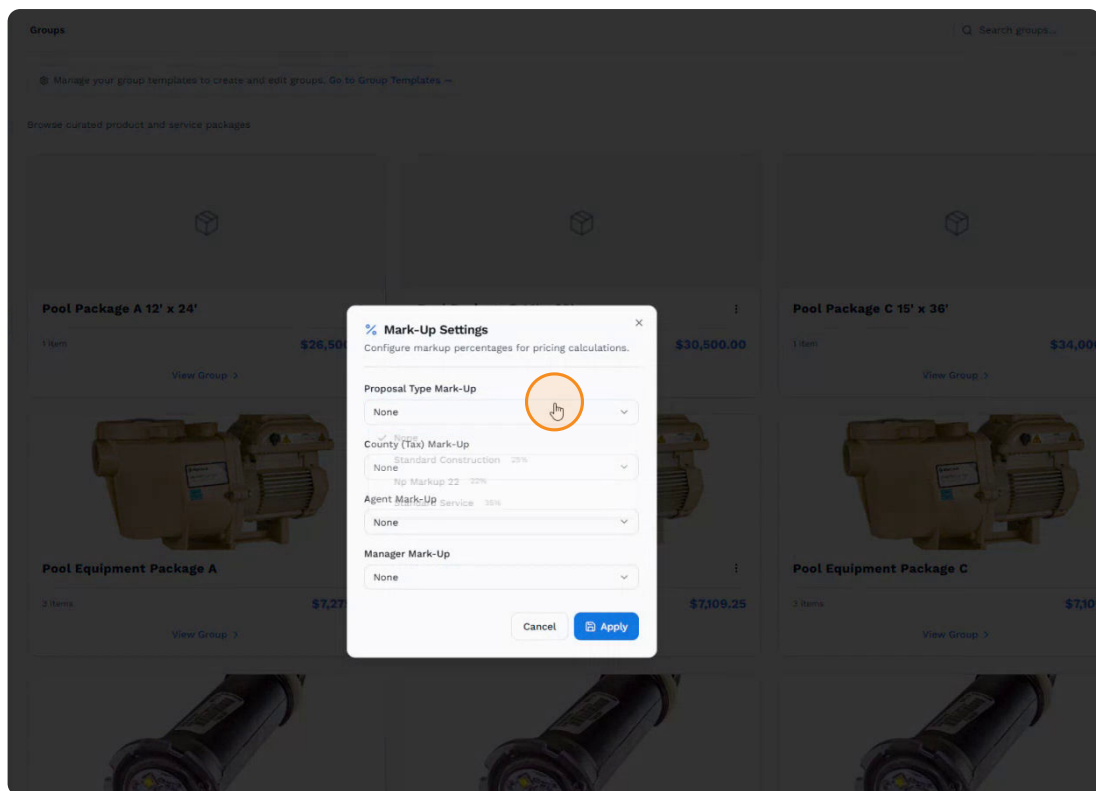




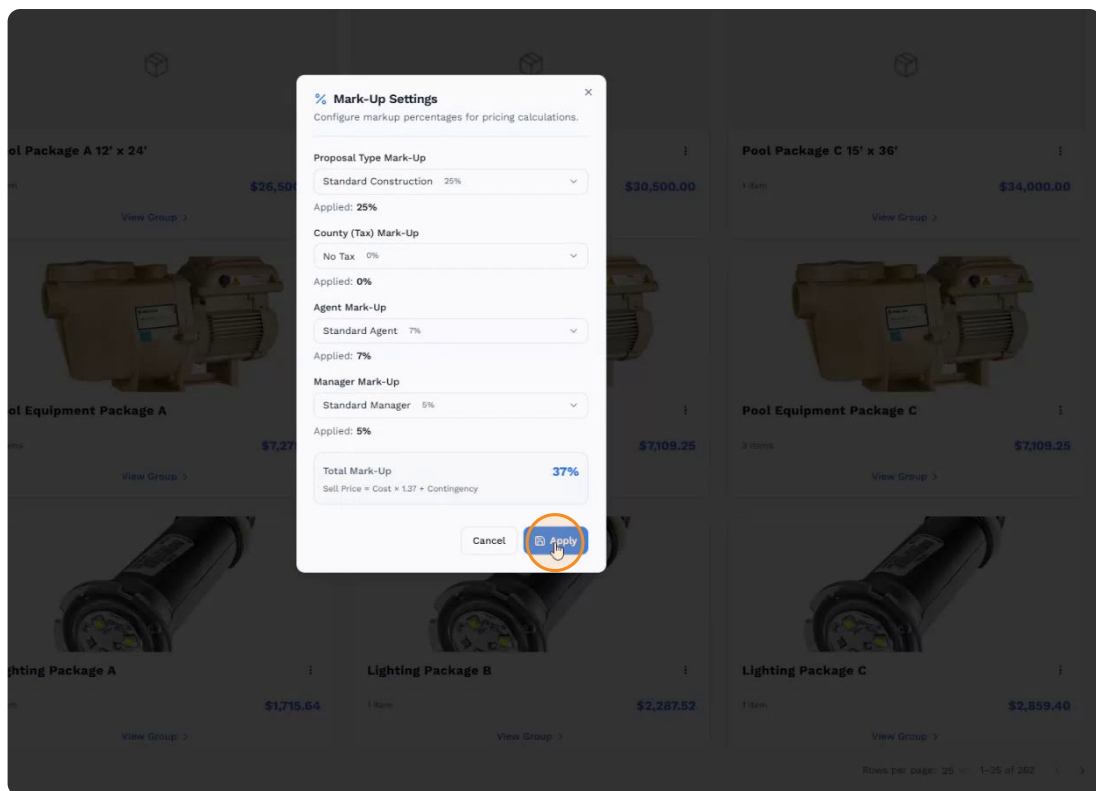
On the right, open the **Markup** section.



In this area, you can select the different types of markups you normally charge your clients.

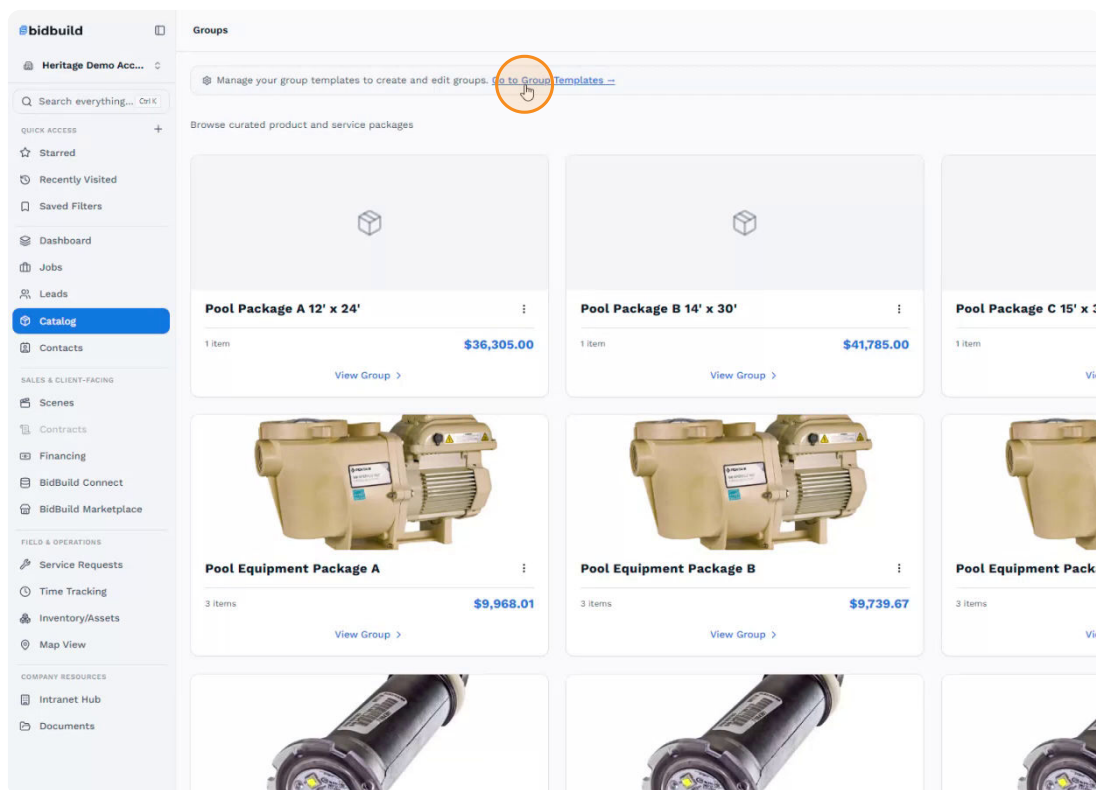


When you apply these settings, the markups in the group will update automatically.

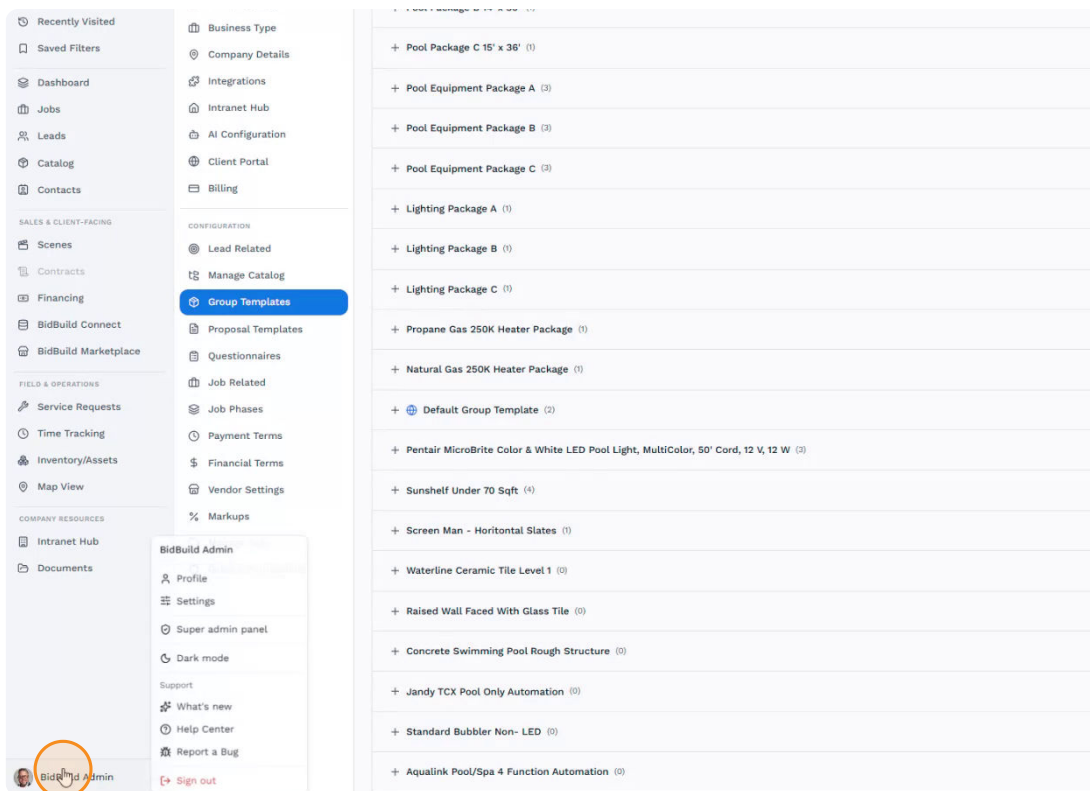


Step 4: Access Group Templates from Settings

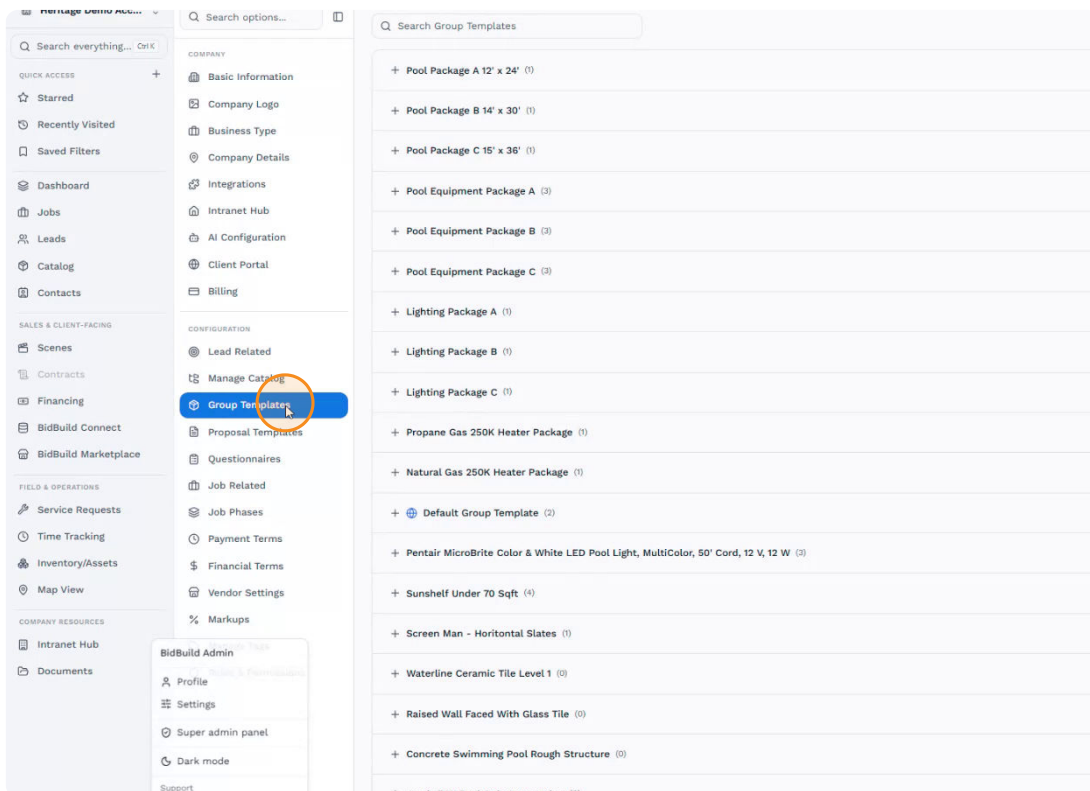
At the top of the screen, select **Go To Group Templates** to open the full group templates area, where you can view and manage all templates, including editing and modifying them.



You can also reach the same area from **Settings**. In the lower-left corner, select **Settings**.

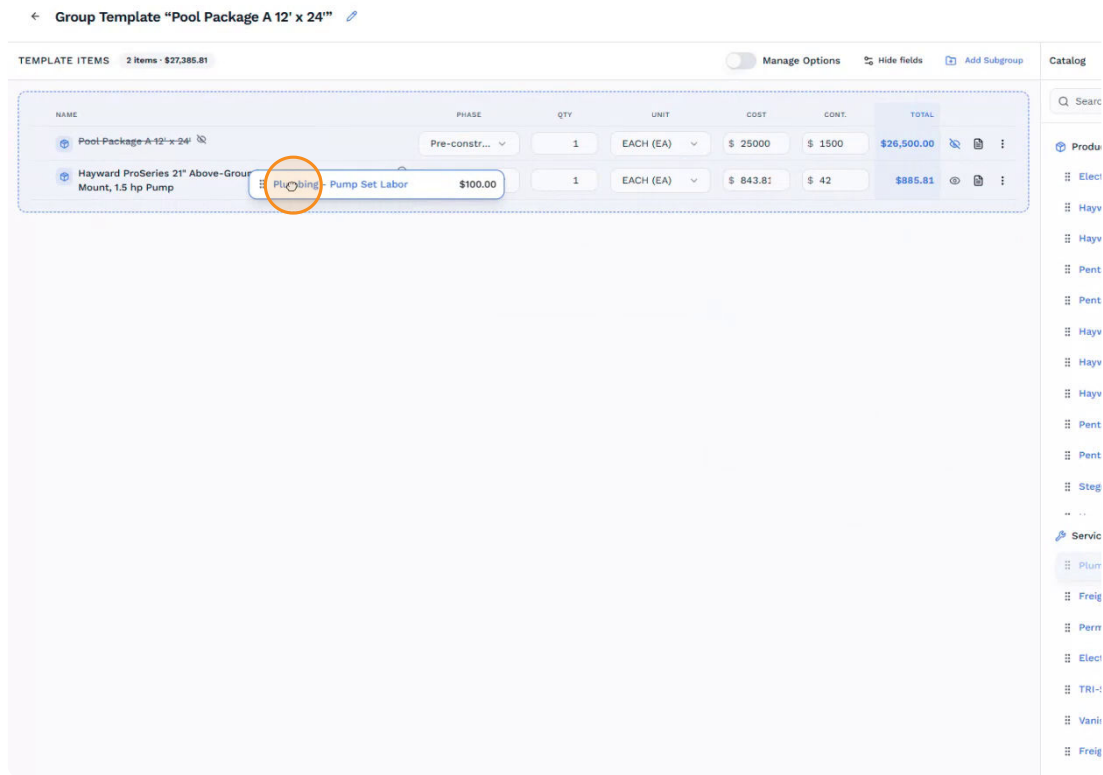


Then choose **Group Templates** to open the same group template management screen.

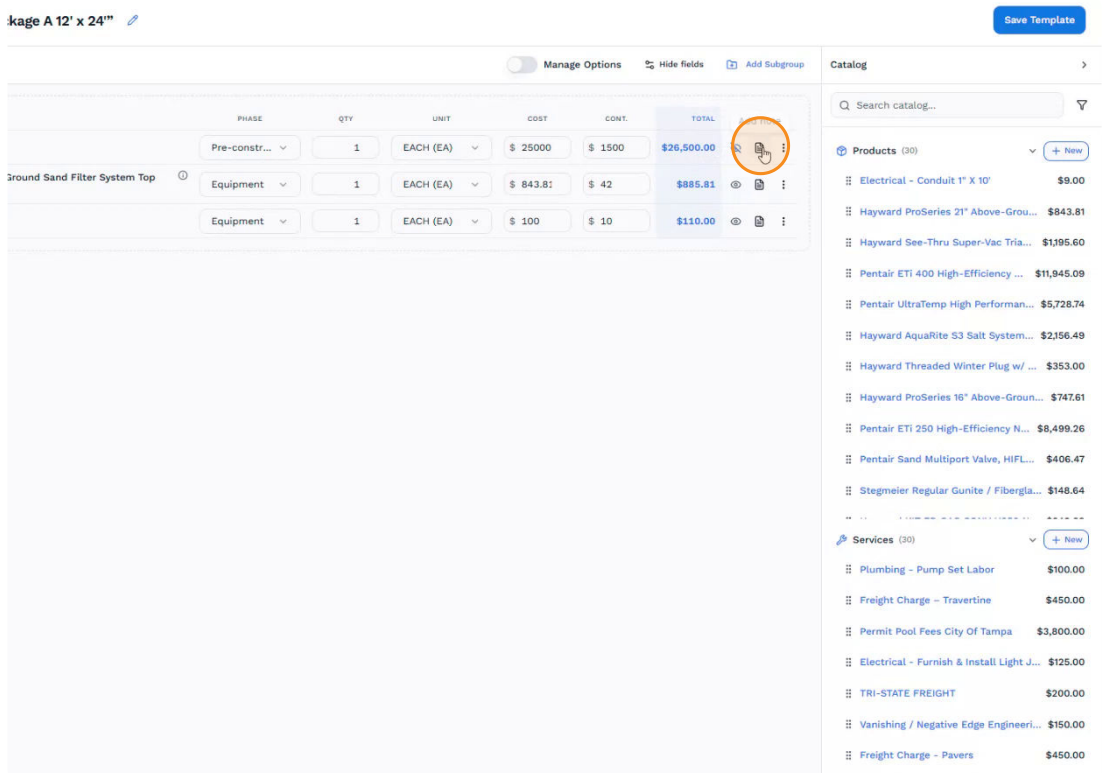


Step 5: Edit, Duplicate, or Delete Group Templates

Within the **Group Templates** area, you can edit, duplicate, or delete existing templates.



Once added, the items are saved as part of that group template. You can also choose whether each item is visible to the client or hidden from the client view, and you can add a quick reference note underneath an item for internal context.



Step 6: Remove Items from a Group

If you want to remove items from a group, select the three-dot menu next to the item, then choose **Remove**.

Pool Package A 12' x 24'

Save

\$27,495.81

Manage Options

Hide fields

Add Subgroup

PHASE	QTY	UNIT	COST	CONT.	TOTAL
Pre-constr...	1	EACH (EA)	\$ 25000	\$ 1500	\$26,500.00
es 21" Above-Ground Sand Filter System Top mp	1	EACH (EA)	\$ 843.81	\$ 42	\$985.81
o Set Labor	1	EACH (EA)	\$ 100	\$ 10	\$110.00

Catalog

Search catalog...

Products (30)

Electrical - Conduit 1" X 10'

Hayward ProSeries 21" Above-Grou...

Hayward See-Thru Super-Vac Tria...

Pentair ETI 400 High-Efficiency ...

Pentair UltraTemp High Performan...

Hayward AquaRite S3 Salt System...

Hayward Threaded Winter Plug w/ ...

Hayward ProSeries 16" Above-Groun

Pentair ETI 250 High-Efficiency N...

Pentair Sand Multiport Valve, HIFL...

Stegmeier Regular Gunite / Fiberglass

Services (30)

Plumbing - Pump Set Labor

Freight Charge - Travertine

Permit Pool Fees City Of Tampa

Electrical - Furnish & Install Light J.

TRI-STATE FREIGHT

Vanishing / Negative Edge Engineeri

Freight Charge - Pavers

Package A 12' x 24'

Save Template

Manage Options

Hide fields

Add Subgroup

PHASE	QTY	UNIT	COST	CONT.	TOTAL
Pre-constr...	1	EACH (EA)	\$ 25000	\$ 1500	\$26,500.00
Ground Sand Filter System Top	1	EACH (EA)	\$ 843.81	\$ 42	\$985.81
	1	EACH (EA)	\$ 100	\$ 10	\$110.00

Catalog

Search catalog...

Products (30)

Electrical - Conduit 1" X 10'

Hayward ProSeries 21" Above-Grou...

Hayward See-Thru Super-Vac Tria...

Pentair ETI 400 High-Efficiency ...

Pentair UltraTemp High Performan...

Hayward AquaRite S3 Salt System...

Hayward Threaded Winter Plug w/ ...

Hayward ProSeries 16" Above-Groun...

Pentair ETI 250 High-Efficiency N...

Pentair Sand Multiport Valve, HIFL...

Stegmeier Regular Gunite / Fiberglass

Services (30)

Plumbing - Pump Set Labor

Freight Charge - Travertine

Permit Pool Fees City Of Tampa

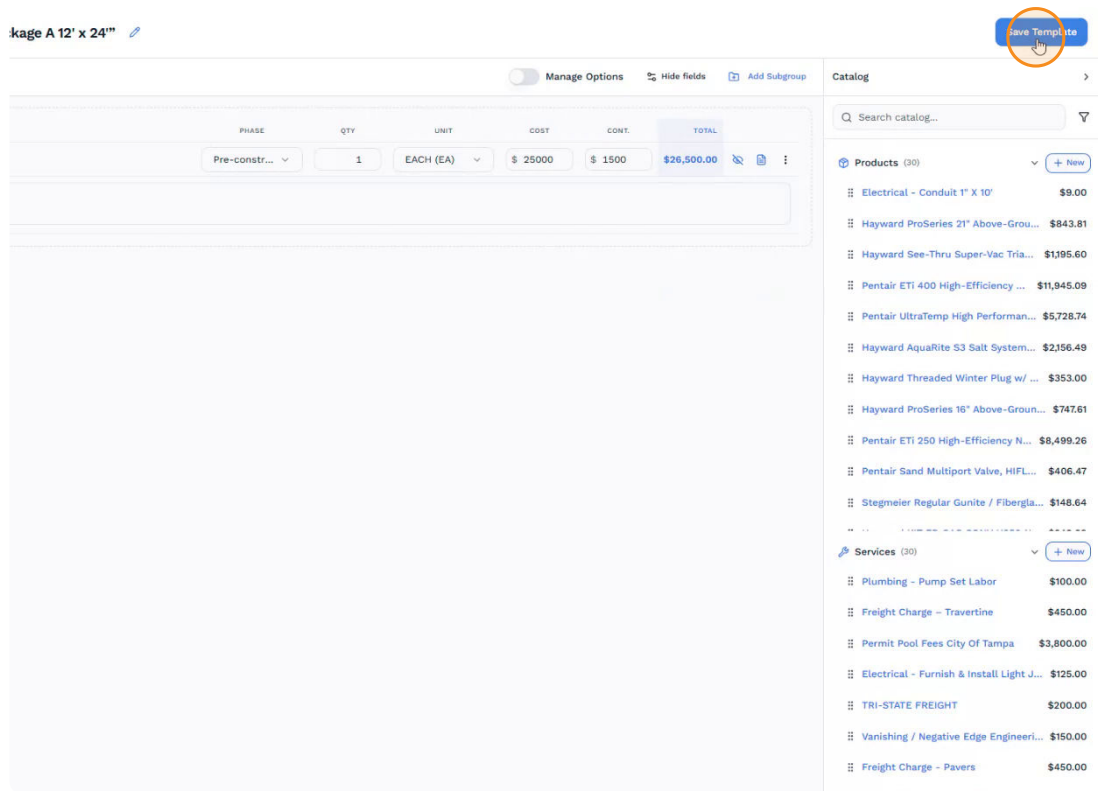
Electrical - Furnish & Install Light J...

TRI-STATE FREIGHT

Vanishing / Negative Edge Engineeri...

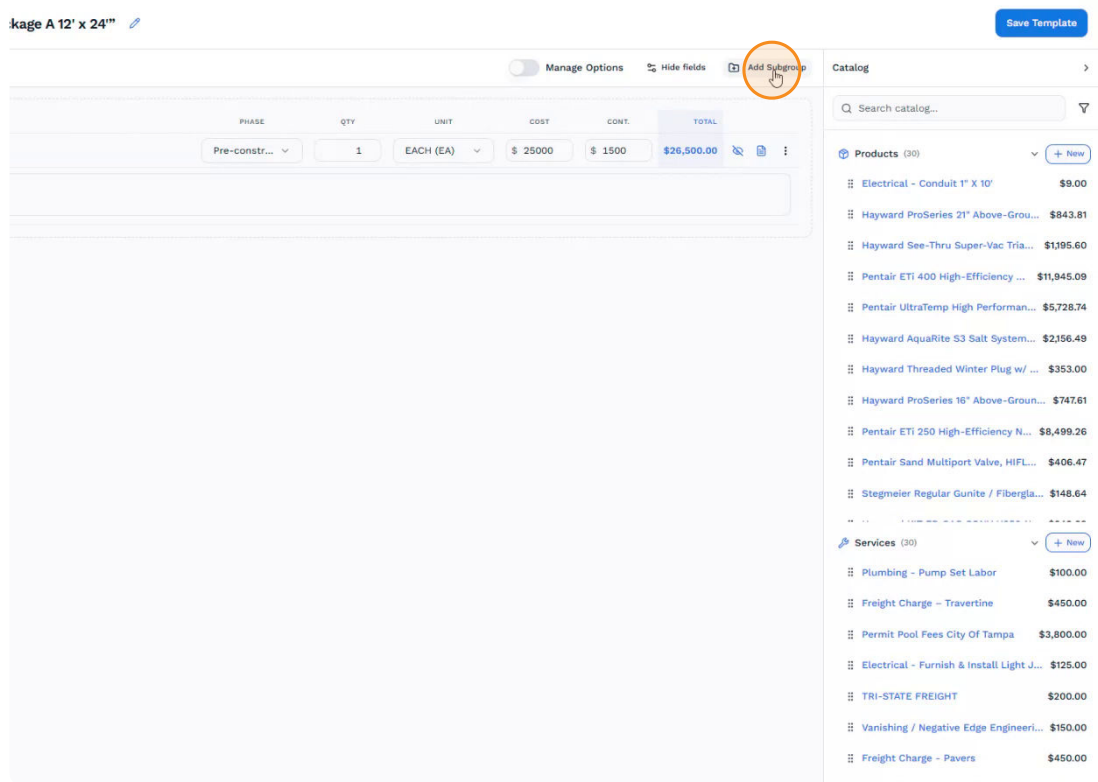
Freight Charge - Pavers

Confirm the removal if prompted.



Step 7: Add and Manage Subgroups Within a Group

You can organize complex groups by adding subgroups inside a main group. At the top of the group builder, select **Add Subgroup**.



On the right side, you can rename the subgroup to something meaningful.

Package A 12' x 24'

Save Template

Manage Options

Hide fields

Add Subgroup

PHASE	QTY	UNIT	COST	CONT.	TOTAL
Pre-constr...	1	EACH (EA)	\$ 25000	\$ 1500	\$26,500.00

Drag products or services here

Catalog

Search catalog...

Products (30)

Electrical - Conduit 1" X 10' \$9.00

Hayward ProSeries 21" Above-Grou... \$843.81

Hayward See-Thru Super-Vac Tria... \$1195.60

Pentair ETI 400 High-Efficiency ... \$11,945.09

Pentair UltraTemp High Performan... \$5,728.74

Hayward AquaRite S3 Salt System... \$2,156.49

Hayward Threaded Winter Plug w/ ... \$353.00

Hayward ProSeries 16" Above-Groun... \$747.61

Pentair ETI 250 High-Efficiency N... \$8,499.26

Pentair Sand Multiport Valve, HIFL... \$406.47

Stegmeier Regular Gunite / Fibergla... \$148.64

Services (30)

Plumbing - Pump Set Labor \$100.00

Freight Charge - Travertine \$450.00

Permit Pool Fees City Of Tampa \$3,800.00

Electrical - Furnish & Install Light J... \$125.00

TRI-STATE FREIGHT \$200.00

Vanishing / Negative Edge Engineeri... \$150.00

Freight Charge - Pavers \$450.00

Package A 12' x 24'

Save Template

Manage Options

Hide fields

Add Subgroup

PHASE	QTY	UNIT	COST	CONT.	TOTAL
Pre-constr...	1	EACH (EA)	\$ 25000	\$ 1500	\$26,500.00

Drag products or services here

Catalog

Search catalog...

Products (30)

Electrical - Conduit 1" X 10' \$9.00

Hayward ProSeries 21" Above-Grou... \$843.81

Hayward See-Thru Super-Vac Tria... \$1195.60

Pentair ETI 400 High-Efficiency ... \$11,945.09

Pentair UltraTemp High Performan... \$5,728.74

Hayward AquaRite S3 Salt System... \$2,156.49

Hayward Threaded Winter Plug w/ ... \$353.00

Hayward ProSeries 16" Above-Groun... \$747.61

Pentair ETI 250 High-Efficiency N... \$8,499.26

Pentair Sand Multiport Valve, HIFL... \$406.47

Stegmeier Regular Gunite / Fibergla... \$148.64

Services (30)

Plumbing - Pump Set Labor \$100.00

Freight Charge - Travertine \$450.00

Permit Pool Fees City Of Tampa \$3,800.00

Electrical - Furnish & Install Light J... \$125.00

TRI-STATE FREIGHT \$200.00

Vanishing / Negative Edge Engineeri... \$150.00

Freight Charge - Pavers \$450.00

After renaming, you can drag and drop different items into the subgroup area as well.

← Group Template "Pool Package A 12' x 24'" 

TEMPLATE ITEMS 1 Items - \$26,500.00 Manage Options Hide fields Add Subgroup Catalog

NAME	PHASE	QTY	UNIT	COST	CONT.	TOTAL
Pool Package A 12' x 24'	Pre-constr...	1	EACH (EA)	\$ 25000	\$ 1500	\$26,500.00

Add a note for this item...

Subgroup 1 (0 items) 

Drag products or services here

Products (30)

- Electrical - Conduit 1" X 1/2"
- Hayward ProSeries 21" Ab
- Hayward See-Thru Super-
- Pentair ETI 400 High-Effic
- Pentair UltraTemp High Pe
- Hayward AquaRite S3 Salt
- Hayward Threaded Winter
- Hayward ProSeries 16" Ab
- Pentair ETI 250 High-Effic
- Pentair Sand Multiport Va
- Stegmeier Regular Gunite

Services (30)

- Plumbing - Pump Set Lab
- Freight Charge - Travertin
- Permit Pool Fees City Of 1
- Electrical - Furnish & Inst
- TRI-STATE FREIGHT
- Vanishing / Negative Edge
- Freight Charge - Pavers

emplate "Pool Package A 12' x 24'" 

2 Items - \$26,764.49 Manage Options Hide fields Add Subgroup Catalog

NAME	PHASE	QTY	UNIT	COST	CONT.	TOTAL
Pool Package A 12' x 24'	Pre-constr...	1	EACH (EA)	\$ 25000	\$ 1500	\$26,500.00
Subgroup 4 (1 items)						\$2,264.49
Hayward AquaRite S3 Salt System 40,000 gal	Equipment	1	Electrical - Furnish & Install Light	\$125.00		\$2,264.49

or this item...

Products (30)

- Electrical - Conduit 1" X 1/2"
- Hayward ProSeries 21" Ab
- Hayward See-Thru Super-
- Pentair ETI 400 High-Effic
- Pentair UltraTemp High Pe
- Hayward AquaRite S3 Salt
- Hayward Threaded Winter
- Hayward ProSeries 16" Ab
- Pentair ETI 250 High-Effic
- Pentair Sand Multiport Va
- Stegmeier Regular Gunite

Services (30)

- Plumbing - Pump Set Lab
- Freight Charge - Travertin
- Permit Pool Fees City Of 1
- Electrical - Furnish & Inst
- TRI-STATE FREIGHT
- Vanishing / Negative Edge
- Freight Charge - Pavers

To delete a subgroup, select **Remove Subgroup**.

Image A 12' x 24'

Save Template

Manage Options

Hide Fields

Add Subgroup

PHASE	QTY	UNIT	COST	CONT.	TOTAL
Pre-constr...	1	EACH (EA)	\$ 25000	\$ 1500	\$26,500.00

Catalog

Search catalog...

Products (30)

Electrical - Conduit 1" X 10'

Hayward ProSeries 21" Above-Grou...

Hayward See-Thru Super-Vac Tria...

Pentair ETI 400 High-Efficiency ...

Pentair UltraTemp High Performan...

Hayward AquaRite S3 Salt System...

Hayward Threaded Winter Plug w/ ...

Hayward ProSeries 16" Above-Groun...

Pentair ETI 250 High-Efficiency N...

Pentair Sand Multiport Valve, HIFL...

Stegmeier Regular Gunite / Fibergla...

Services (30)

Plumbing - Pump Set Labor

Freight Charge - Travertine

Permit Pool Fees City Of Tampa

Electrical - Furnish & Install Light J...

TRI-STATE FREIGHT

Vanishing / Negative Edge Engineeri...

Freight Charge - Pavers

In this area, you can control visibility and see additional fields.

Image A 12' x 24'

Save Template

Manage Options

Hide Fields

Add Subgroup

PHASE	QTY	UNIT	COST	CONT.	TOTAL
Pre-constr...	1	EACH (EA)	\$ 25000	\$ 1500	\$26,500.00

Catalog

Search catalog...

Products (30)

Electrical - Conduit 1" X 10'

Hayward ProSeries 21" Above-Grou...

Hayward See-Thru Super-Vac Tria...

Pentair ETI 400 High-Efficiency ...

Pentair UltraTemp High Performan...

Hayward AquaRite S3 Salt System...

Hayward Threaded Winter Plug w/ ...

Hayward ProSeries 16" Above-Groun...

Pentair ETI 250 High-Efficiency N...

Pentair Sand Multiport Valve, HIFL...

Stegmeier Regular Gunite / Fibergla...

Services (30)

Plumbing - Pump Set Labor

Freight Charge - Travertine

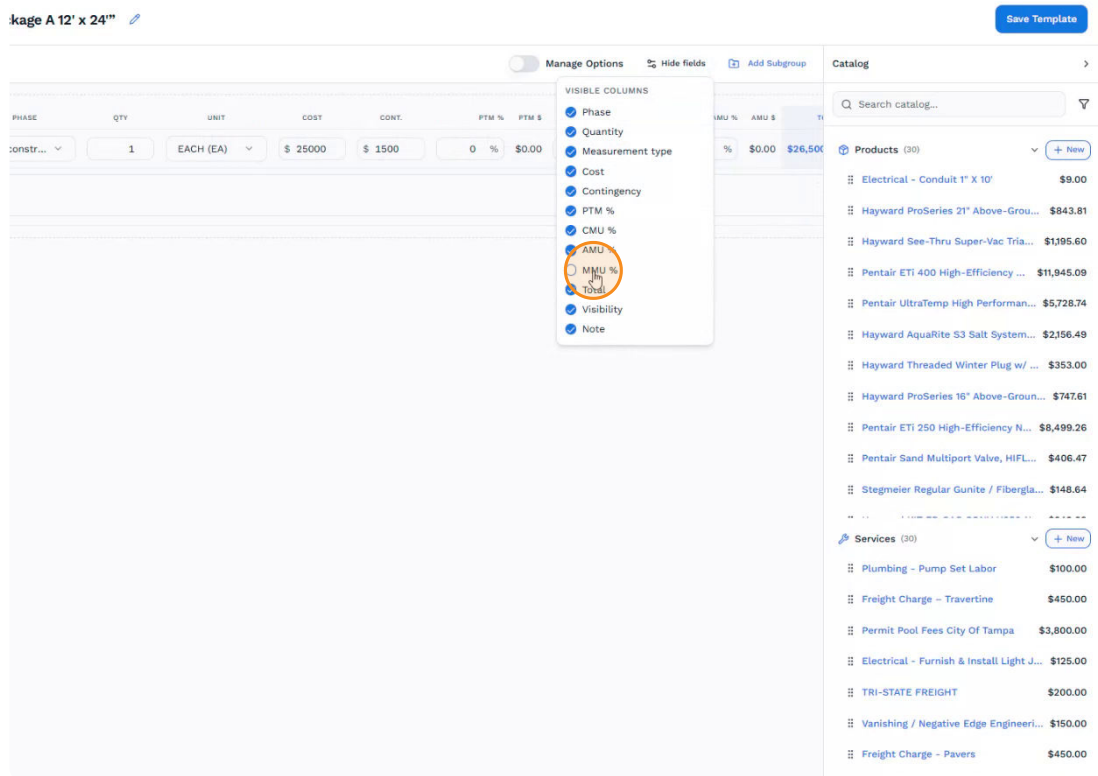
Permit Pool Fees City Of Tampa

Electrical - Furnish & Install Light J...

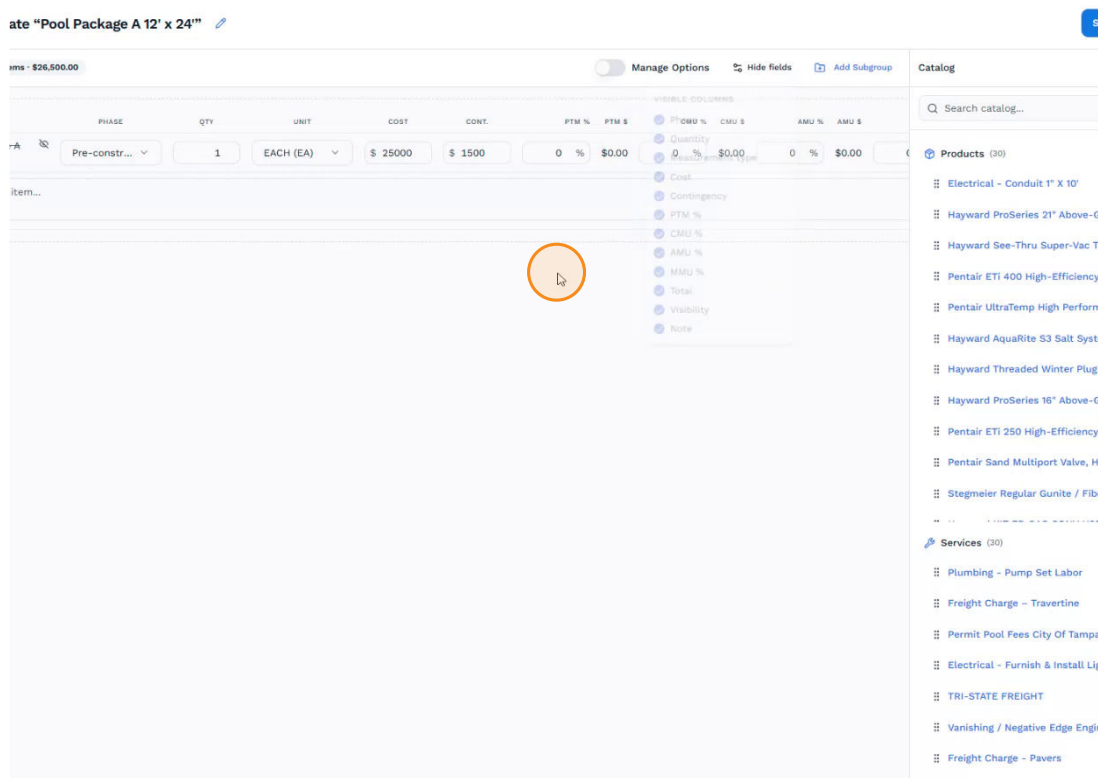
TRI-STATE FREIGHT

Vanishing / Negative Edge Engineeri...

Freight Charge - Pavers



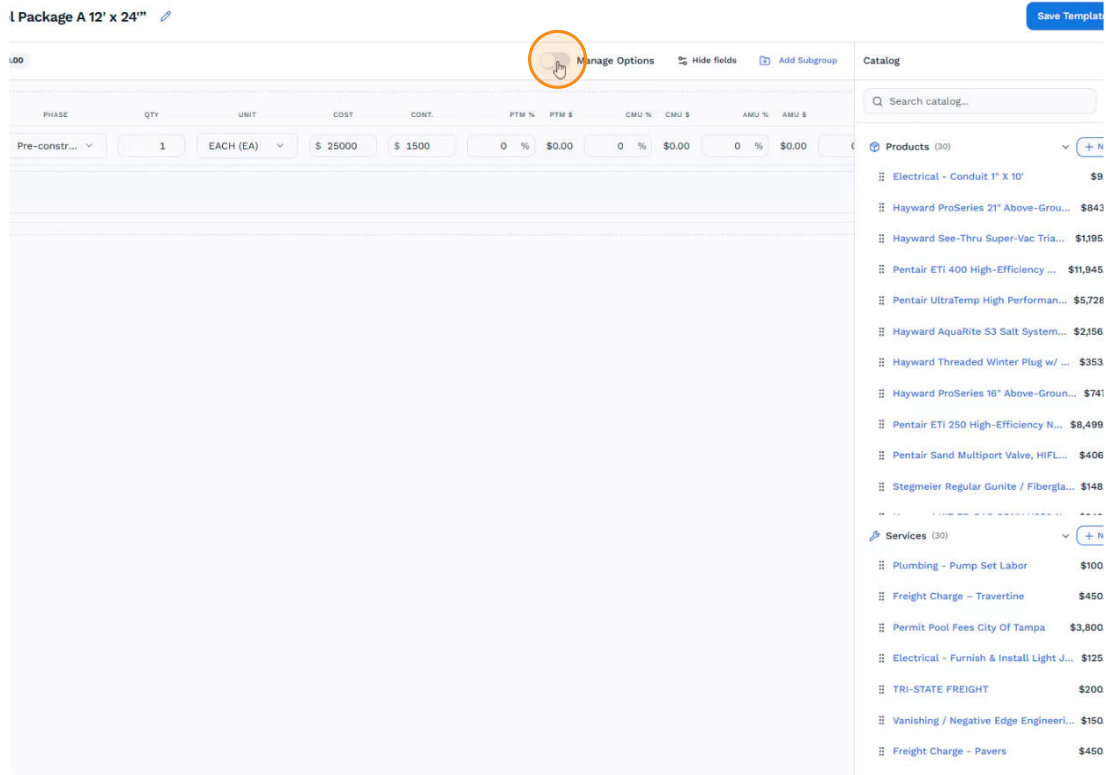
These fields can include Proposal Type Markup, County Tax Markup, Agent Markup, and Manager Markup.



You can manually adjust any of these markup-related fields for the group as needed.

Step 9: Configure Group Options for Client Selection

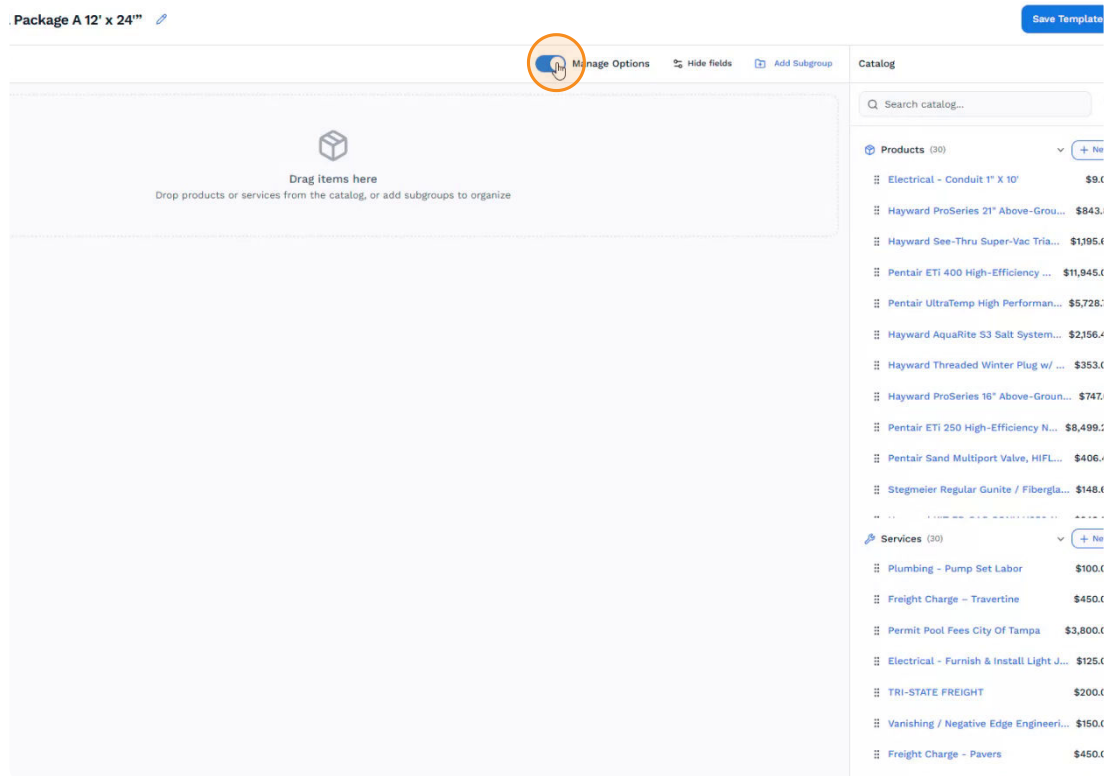
Use the **Manage Options** section to define options for the group.

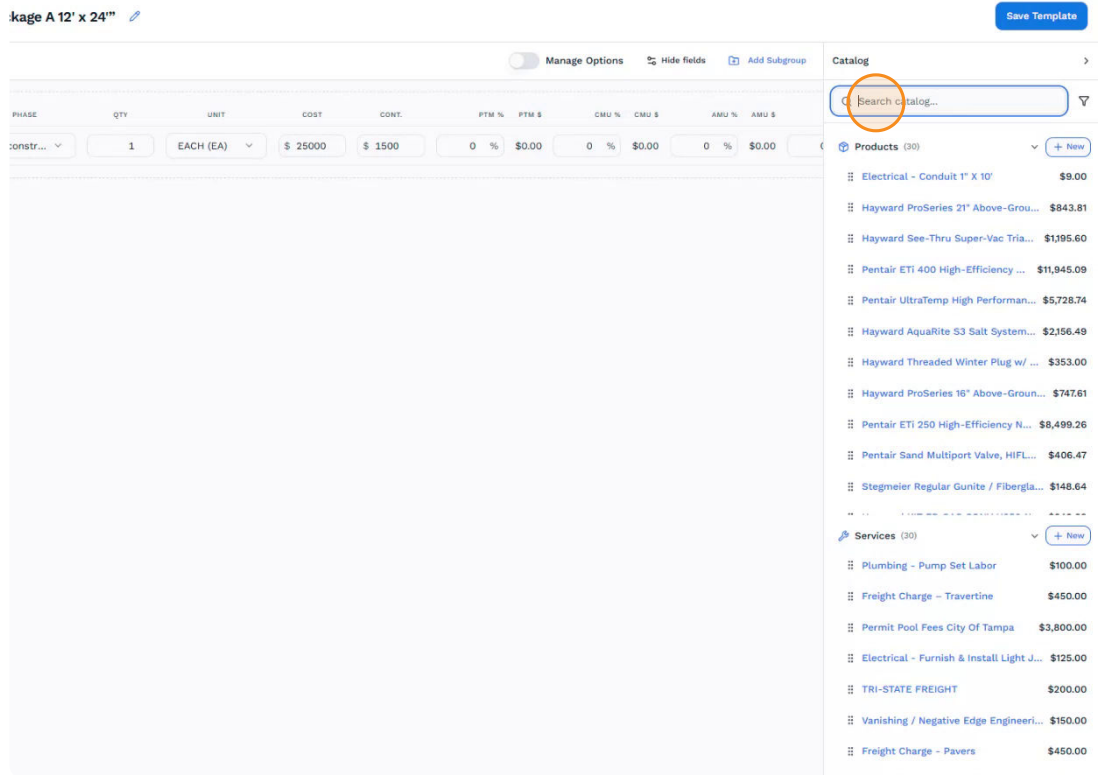


For example, if you include this group in a proposal, clients will see multiple selectable options within that group. This section controls how those options are set up and presented to the client.

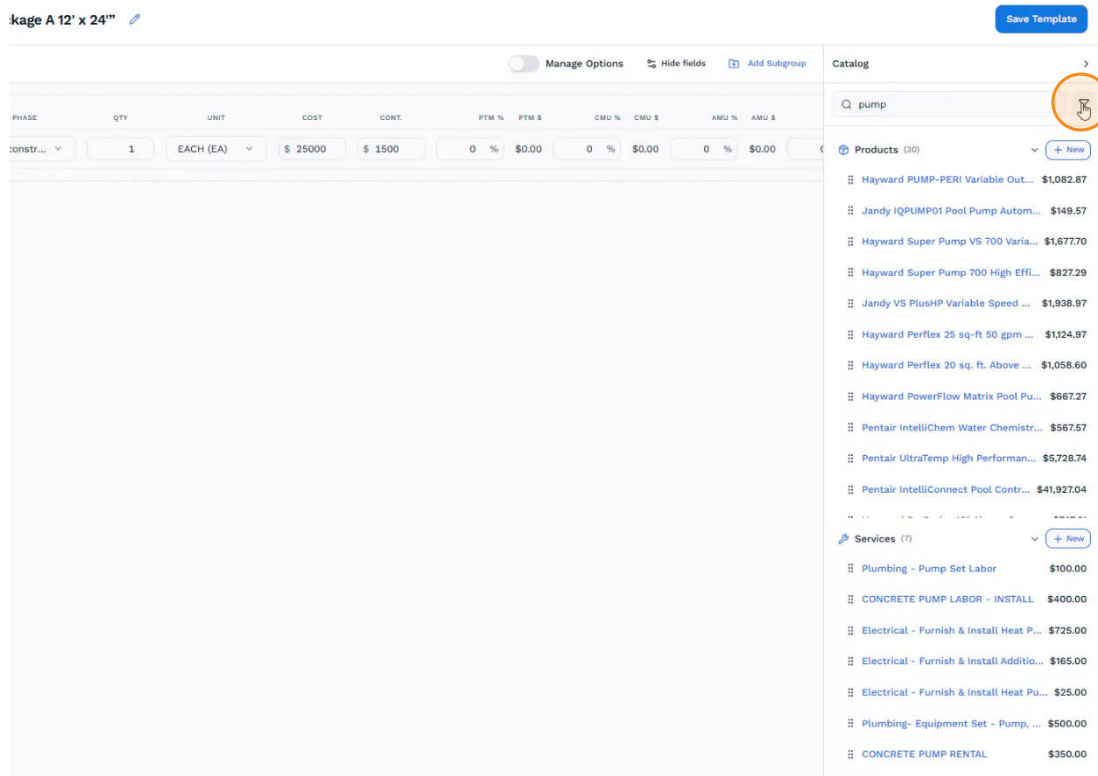
Step 10: Search and Filter Catalog Items While Building a Group

From the catalog panel on the side, you can search for items to add to your group.





You can also filter items by category, subcategory, and vendor to quickly find what you need.



If you want to modify the name of a group template, select the **Edit** option on the template, then rename it, add or update its description, and apply tags if you use tags for organization.

Package A 12' x 24'

Save Template

Manage Options

Hide fields

Add Subgroup

Q

ump

X

Products (30)

+ New

Hayward PUMP-PERI Variable Out...

\$1,082.87

Jandy IQPUMP01 Pool Pump Autom...

\$149.57

Hayward Super Pump VS 700 Varia...

\$1,677.70

Hayward Super Pump 700 High Eff...

\$827.29

Jandy VS PlusHP Variable Speed ...

\$1,938.97

Hayward Perflex 25 sq-ft 50 gpm ...

\$1,124.97

Hayward Perflex 20 sq. ft. Above ...

\$1,058.60

Hayward PowerFlow Matrix Pool Pu...

\$667.27

Pentair IntelliChem Water Chemistr...

\$567.57

Pentair UltraTemp High Performan...

\$5,728.74

Pentair IntelliConnect Pool Contr...

\$41,927.04

Services (7)

+ New

Plumbing - Pump Set Labor

\$100.00

CONCRETE PUMP LABOR - INSTALL

\$400.00

Electrical - Furnish & Install Heat P...

\$725.00

Electrical - Furnish & Install Additio...

\$165.00

Electrical - Furnish & Install Heat Pu...

\$25.00

Plumbing- Equipment Set - Pump, ...

\$500.00

CONCRETE PUMP RENTAL

\$350.00

Group Template "Pool Package A 12' x 24'"

TEMPLATE ITEMS

1 Items - \$26,500.00

Manage Options

Hide fields

Add Subgroup

Q

Search

Pool Package A 12' x 24'

Pre-constr...

1

EACH (EA)

\$ 25000

\$ 1500

0 %

\$0.00

0 %

\$0.00

0 %

\$0.00

Products

+ New

Elect

Hayv

Hayv

Pent

Pent

Hayv

Hayv

Hayv

Pent

Pent

Steg

...

Service

Plumr

Freig

Perm

Elect

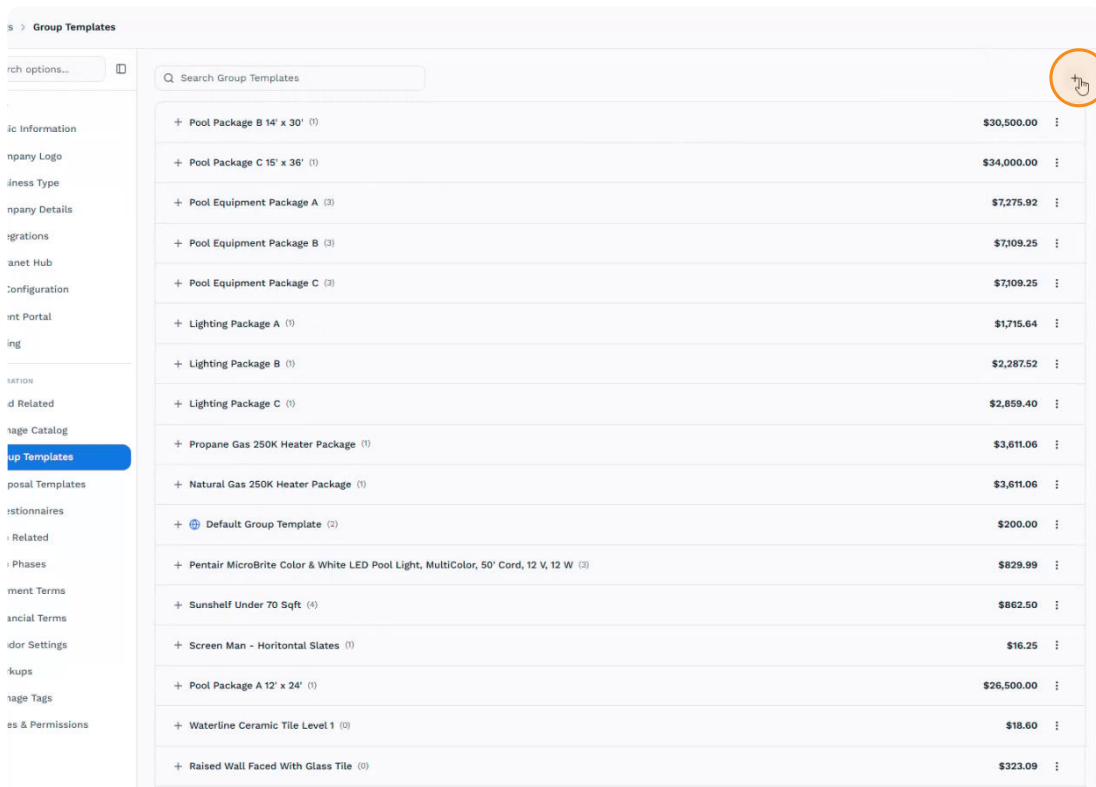
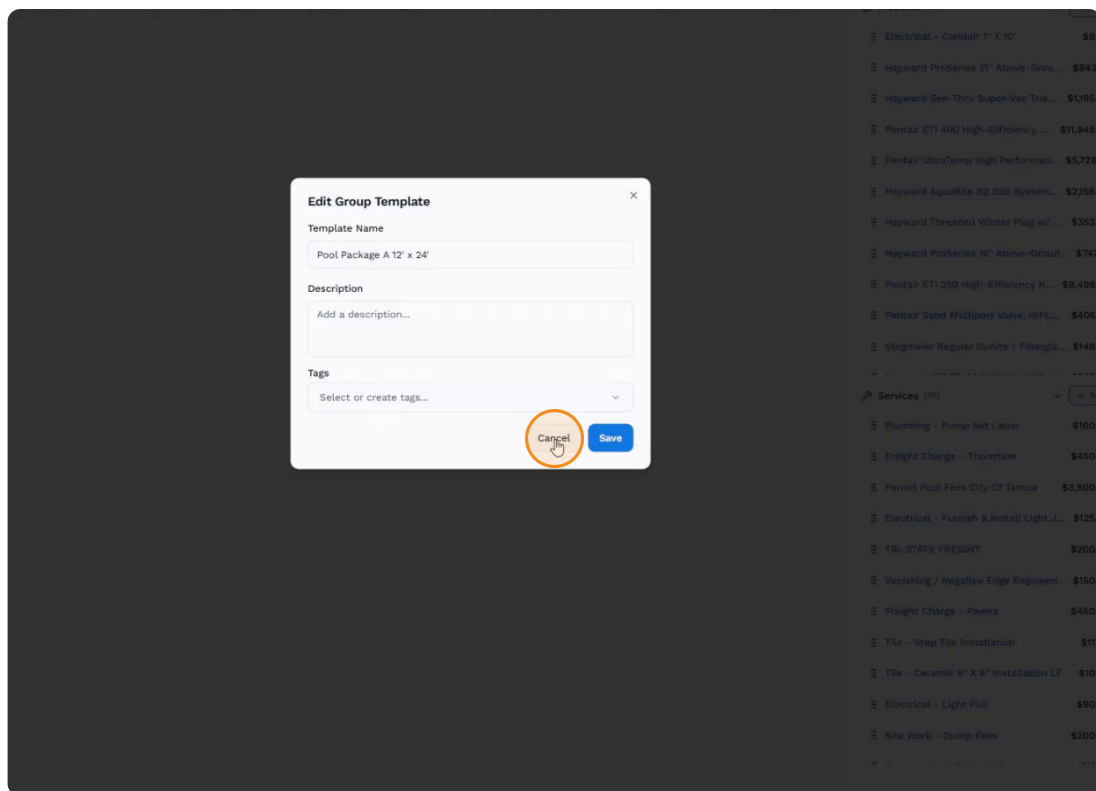
TRI-I

Vanli

Freig

Step 11: Create a New Group Template

To start a new group template, go to the upper-right corner and select the **Plus (+)** button.



This opens a fresh, empty group space where you can add items and configure the new group.

Step 12: Duplicate an Existing Group Template

If you already have a package with many items and you do not want to rebuild it from scratch, use the **Duplicate** function on that group template.

Business Type

Company Details

Integrations

Intranet Hub

Configuration

Client Portal

Job Phases

Payment Terms

Financial Terms

Vendor Settings

Markups

Manage Tags

Roles & Permissions

SALES & CLIENT-FACING

Scenes

CONTRACTS

Financing

BidBuild Connect

BidBuild Marketplace

FIELD & OPERATIONS

Service Requests

Time Tracking

Inventory/Assets

Map View

COMPANY RESOURCES

Intranet Hub

Documents

BidBuild Admin

+ Pool Equipment Package A (3)

\$7,275.92

+ Pool Equipment Package B (3)

\$7,109.25

+ Pool Equipment Package C (3)

\$7,109.25

+ Lighting Package A (1)

\$1,715.64

+ Lighting Package B (1)

\$2,287.52

+ Lighting Package C (1)

\$2,859.40

+ Propane Gas 250K Heater Package (1)

\$3,611.06

+ Natural Gas 250K Heater Package (1)

\$3,611.06

+ Default Group Template (2)

\$200.00

Pentair MicroBrite Color & White LED Pool Light, MultiColor, 50' Cord, 12 V, 12 W (3)

\$829.99

Photo

Type

Product/Service Name

Material Vendor

Cost Code

Category

Subcategory

Manufacturer

Price





Pentair MicroBrite Color & White LED Pool Light, MultiColor, 50' Cord, 12 V, 12 W, 3.5" Long | 820424

-

-

-

-

-

Edit

Duplicate

Delete





Conduit Installation Labor

-

-

-

-

-

\$110.00





Pool Light Installation Labor

-

-

-

-

-

\$110.00

+ Sunshelf Under 70 Sqft (4)

\$862.50

+ Screen Man - Horizontal Slates (1)

\$16.25

+ Pool Package A 12' x 24' (1)

\$26,500.00

+ Waterline Ceramic Tile Level 1 (0)

\$18.60

+ Raised Wall Faced With Glass Tile (0)

\$123.08

Recently Visited

Saved Filters

Dashboard

Jobs

Leads

Catalog

Contacts

SALES & CLIENT-FACING

Scenes

CONTRACTS

Financing

BidBuild Connect

BidBuild Marketplace

FIELD & OPERATIONS

Service Requests

Time Tracking

Inventory/Assets

Map View

COMPANY RESOURCES

Intranet Hub

Documents

BidBuild Admin

Business Type

Company Details

Integrations

Intranet Hub

AI Configuration

Client Portal

Billing

CONFIGURATION

Lead Related

Manage Catalog

Group Templates

Proposal Templates

Questionnaires

Job Related

Job Phases

Payment Terms

Financial Terms

Vendor Settings

Markups

Manage Tags

Roles & Permissions

+ Pool Equipment Package A (3)

\$7,275.92

+ Pool Equipment Package B (3)

\$7,109.25

+ Pool Equipment Package C (3)

\$7,109.25

+ Lighting Package A (1)

\$1,715.64

+ Lighting Package B (1)

\$2,287.52

+ Lighting Package C (1)

\$2,859.40

+ Propane Gas 250K Heater Package (1)

\$3,611.06

+ Natural Gas 250K Heater Package (1)

\$3,611.06

+ Default Group Template (2)

\$200.00

Pentair MicroBrite Color & White LED Pool Light, MultiColor, 50' Cord, 12 V, 12 W (3)

\$829.99

Photo

Type

Product/Service Name

Material Vendor

Cost Code

Category

Subcategory

Manufacturer

Price





Pentair MicroBrite Color & White LED Pool Light, MultiColor, 50' Cord, 12 V, 12 W, 3.5" Long | 820424

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Edit

Duplicate

Delete





Conduit Installation Labor

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\$110.00





Pool Light Installation Labor

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\$110.00

+ Sunshelf Under 70 Sqft (4)

\$862.50

+ Screen Man - Horizontal Slates (1)

\$16.25

+ Pool Package A 12' x 24' (1)

\$26,500.00

+ Waterline Ceramic Tile Level 1 (0)

\$18.60

+ Raised Wall Faced With Glass Tile (0)

\$123.08