

Price Catalog

Price Catalog is used by companies to track the items (parts and labor) used by their mobile employees. Managers can specify items from the catalog for their mobile employees to use with specific services to shorten the reimbursement cycle.

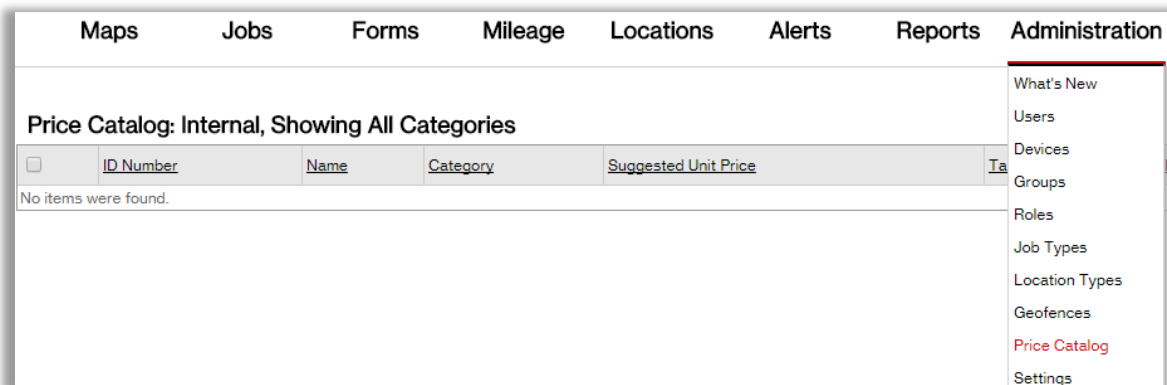
What’s inside it for me:

Web users will learn how to upload varied materials, their technicians use in the field; these materials can then be accessed through the mobile application as part of the electronic Invoicing function. The quantity of parts used and the cost per unit can be set on both the web management portal, and adjusted on a job by job basis by the mobile employee in the field.

Accessing Price Catalog

To access Price Catalog

- Navigate to **Administration > Price Catalog**
- Click on **“Price Catalog”**



In the Price catalog section web users can

- Add new items individually
- Delete existing items
- Create and manage different item categories
- Upload multiple items at one time

Using the Catalog and Category Filters

1. Most accounts will only have an internal catalog, by default. Internal indicates that the part was added from within the Field Force Manager web management app.

Note: Any account that has been integrated with Click Service Networks will have the option to add additional catalogs that would be considered external.

- Web users in all accounts will have the ability to filter items based on category using the filter.

The screenshot shows a user interface with two dropdown menus at the top. The first dropdown is labeled "Select Catalog:" and has "Internal" selected. The second dropdown is labeled "Select Category:" and has "All Categories" selected. Below these are five buttons: "Add New Item", "Delete Item", "Manage Categories", and "Upload Items".

How to add new items?

Method 1: Add new items manually by following the steps below:

- Click on "Add New Item"

This screenshot is identical to the one above, but the "Add New Item" button is highlighted with a red rectangular box to indicate it is the next step in the process.

- Add the following:
 - ID Number (required field)
 - Name (required field)
 - Category
 - Suggested Unit Price
 - Tax Rate (%)
 - Barcode Number (optional)

Add New Item

ID Number: *

Name: *

Category: ▼

Suggested Unit Price (\$):

Tax Rate (%):

Barcode Number (optional):

- Click on save and close or you can click save and new if you want to add more Items.

Method 2: Upload Items

- Clicking on “Upload Items”
- Choose file (if you have an existing file which contains all the parts)
- Select Submit

Notes:

- If you don't have a current format there is an Upload Template Utility on the system. You can always click on “Get Template” enter the details of the parts and then select that file to upload.
- Also, select “Update Existing Records” to bring the existing records up to date.
- This template though cannot be modified or it will not upload or throw an error when doing so.

Price Catalog: Internal, Showing All Categories

Select Catalog:	ID Number	
<input type="text" value="Internal"/> ▼	<input type="checkbox"/>	
<input type="text" value="All Categories"/> ▼	<input type="checkbox"/>	100

Upload Items

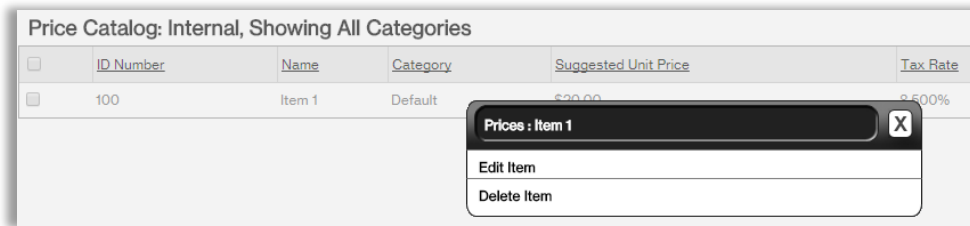
Choose the file to upload: No file chosen

Update Existing Records

How to select, edit or delete an item?

Select the item you need to edit and make those changes. Selecting the option to either edit/delete per your requirement.

Note: Deleting an item will remove it from the Price List on both the mobile application and web console.



How to Manage Categories:

More than one price catalog can be managed by the company. An Internal company catalog is typically used for the company generated jobs and an external catalog is used in case the company has an agreement with a third party.

By using the 'Select Catalog' control, the user can quickly switch between the internal and external catalogs. All catalogs can be downloaded as excel files.

Web users can add additional categories to the list. All new categories will be displayed under the drop-down menu labeled Select Category.

How to add more categories?

- Click on Manage Categories
- Click on new
- Enter category name
- Click on apply, click save and close.

