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**Administration**

**Account Set-Up 9:** Manage Service Catalog

We will now Cover Organizing and Adding items to your Service catalog.

The first thing is understand the format of the Catalog and how you can integrate your current Pricebook/Service Catalog

The catalog is currently broken down into **10 Service Types with up to 3 filters and more can be added**

Nine of the Ten Service Types will Appear inyour catalog automatically



*Here is an example of what a catalog could look like when your see your Service Types*

*Each Type has filters attached to them to break down items more precisely to find what you’re looking for*

Let’s move on to the first steps of creating your Service Types and Catalog

You may want to mock up a paper copy to give yourself an outline of how your catalog will be filtered

***This is a jQuery tree***

*It is a standard in filtering in operating systems to find what you’re looking for, ThermoGRID Catalog will be similar to this Concept. We will chose the initial category and then filter down from there, your mock up may look something like this.*

1. Click on **Administration** and **Manage Dropdowns**
2. Click on **Service Types**

***The Green Highlighted Area***

***are the items that will be edited***

***for the Service Catalog***



 *You will notice necessary Filters are listed on the right*

Change the Name of any of the Descriptions you would like with **Edit** Button, but be aware that the filters on the right **MUST** be used. If there is a Category that you do not need to filter on, Type 9 and 10 have none. **(Don’t Edit Tasks and Equipment, this will be addressed in “Creating a New Service Category”)**

For this Demonstration, we will change and customize the filters on Type 1 **Next Page** 🡺

1. Click **Edit**
2. Change the **Description** to whatever you would like and Click **Done** (Under 21 Characters).





1. Click on **Service** **Categories** on the left side of the page, Add a Category. These will be available to search by when managing the catalog. Click **Done** when completed



1. Click on **Service** **Filters** on the left side of the page, Click on **Edit** and Change **Filter 1, Filter 2 and Filter 3** to whatever you would like and Click **Done** when completed

(These will be the names of Filters types you will be searching through to find Equipment/Items/Parts/Service in your catalog. These do not NEED to be changed)

You will notice that your Custom Filters have replaced the Drop Down Categories 

1. Click on the Name of Filter 1 on the left, In my scenario, I’ve named it “**Type**”
2. Click on **Edit** and Add/Change the First Set of filters, Click **Done** When Complete 

*I’ve created an Option to view 4 Different Types of panels after I select* ***Panels*** *in the Service Catalog*

1. Click on the Name of Filter 2 on the left, In my scenario, I’ve named it “**Amp**”
2. Click on **Edit** and Add/Change the Second Set of filters, Click **Done** When Complete

*I’ve created an Option to view 3 Different Amps after I select Panels>Filter 1 in the Service Catalog*

1. Click on the Name of Filter 3 on the left, In my scenario I’ve named it “**Space/Circuit**”
2. Click on **Edit** and Add/Change the Second Set of filters, Click **Done** When Complete

*I’ve created an Option to see 3 Different Space/Circuits after I select Panels>Filter 1>Filter 2 in the Service Catalog*

**Next Page 🡺**

**Let’s see what this would look like in the service Catalog**



Now we will Add an Item to these Filters so It can be seen in the catalog

1. Click **Administration** and **Manage Service Catalog**
2. Click new Item
3. You will be presented with the Options on the Next Page to edit your catalog Item.

Each input has a useful functionality and this will outline adding and assigning those options.

Hello

**Information**

1. Chose **Service Type** we Created



1. Chose **Category** we created
2. Chose **QuickBooks Account** and **Class** if needed
3. Input a **Description** of your Line Item 
4. Input a **Brand**, **Product Line** and **Model number** if the Item has one 
5. Chose a **Supplier** you get the Item from if needed 
6. Chose What dates you would like the item to be active for 

**Prices**

1. Add any **Equipment Cost** you have for this Item

(What does this Item Cost you to Purchase)

1. Add any **Material Cost** you have for this Item

(Misc. Materials that need to be used for install that you don’t want to track)

1. Add any **Labor Cost** you have for this Item

 (Highest Paid Tech x Labor Hours for job) or ($30/h x 3 hours = $90)



1. **Retail Override Amount** is only used if you’re NOT using **GPM**

(you can always enter a number here just to try to compare it to GPM)

1. How many **Labor Hours** does this take?
2. What will be the Tax Method for this Item
	1. Don’t Apply Sales Tax
	2. Include Tax in Item Cost
	3. Separate Tax from Item Cost

**Next Page 🡺**

**Equipment Attributes**

The Filters that we created earlier are now available under the Filter Types here

I’ve Chosen

 **Type 1 (Type)** = Interior Flush Mount Sub Panels

**Type 2** **(Amp)** = 125 Amp

**Type 3 (Space/Circuit)** = 12/24

I chose the 3 Filters here because Panels **(Type 1)** had these 3 filters attached to it

*We do not need to input data for the other filters because they do not effect this Item*

 **Next Page 🡺**

**Tags and Flags**

* **Main Component Tags -** add Item **Tags** to show up with this Item when selected
* **Accessory Component Tags –** what is the Item **Tag** for this Item
* **Access Control –** Who can Select this Item for Sale

**Example:**

You’re selling a Water Heater and want all Items needed to come with it when you select the water heater.

The Catalog Items that we want to attach would have an Accessory Component Tag

The Items **description** could be : Drip Pan for Full Water Heater Install

But the **Accessory Component Tag** Could be: DripPan

or

The Items **description** could be : Water Shutoff (Ball Valve)

But the **Accessory Component Tag** Could be: ballvlv

Now if we wanted these Items to come in with our Water Heater, Put the **Accessory Component Tags** in the **Main Component Tags**



Which would look like this:



*If you have issues with setting this up or difficulty understanding the process please feel free to content customer support at anytime to go over possible training packages or quick questions*



* Can the Item be added with the Main Tagged Item
* Can it Be removed from the Main Item on an invoice
* Can the Item be added without the Main Item
* Does this item apply to commission
* Able override selling price on an invoice
* Able override Description on an invoice
* Change GPM for this one Item
* Will you Calculate the Invoice Cost of this Item with GPM

**Discounts and Fees**

Select the Discounts and Fees that can be applied to this Item, if none are selected, all are available.

** Next Page 🡺**

Once you have Completed entering all the information needed for this Catalog Item, Click Save on the Bottom Right. 

The Item now will be available for selection when navigating through your service Catalog.

**Creating a new Service Category**

After you have edited the 9 visible Categories you may way more Categories to sort line items into.

1. Click on **Administration** and **Manage Dropdowns**
2. Click on **Service Categories** on the left



1. Add the Name that you want to create as a new Category to the **Category List**
2. Create a new Line Item and under “**Information**”
3. Chose **Service Type** : Task and Equipment 
4. Chose the new **Category** that was just created



1. Fill in All necessary Item Details and Click **Save**

**Let’s see what this would look like in the service Catalog**



You can see here that at the End/Bottom of our Service catalog, The Option for “**Custom**” (which was my specific category name, yours can be whatever you like)





Any Line Items that a Sorted under **“Tasks and Equipment>Custom”** will now show up here

You can make as many of these categories as you wish

This concludes the Manage Service Catalog Tutorial