

**Volume**

**i**



**CONNECTUSPro**

**Online Price Book Manual**

CONNECTUS TECHNOLOGY

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# **ConnectusPro Online Price Book Manual**

ConnectusPro  
16700 Park Row  
Houston, TX 77084  
Phone: 855.646.6630 Fax: 281.492.3005

# Online Price Book Manual

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## General Information

The Price Book editing webpage will be used to update prices for your company. It puts the power in your hands, and on the iPad.

13HQ001 Master Book search Reset

0.0 100.0 % 200.0 % Submit to Database

Showing 1 to 10 of 288 entries Search: Print Copy Excel CSV PDF

Item	Description	Cost	Price				Account Code	
			Standard Price	Member Price	Standard AddOn Price	Add-On Member Price	Residential Account Code	Commercial Account Code
F00100	Premier Torino Lavatory Faucet, Centerset	129.02	388.29	330.79	334.27	284.12	[40030] Sales Res Plb Repair	[40330] Sales Comm
F00101	Premier Torino Lavatory Faucet, Wide Spread	165.19	486.25	414.06	432.23	367.39	[40030] Sales Res Plb Repair	[40330] Sales Comm
F00110	Premier Sonoma Lavatory Faucet,	121.23	371.48	316.51	317.46	269.84	[40030] Sales Res Plb Repair	[40330] Sales Comm

F00100 Premier Torino Lavatory Faucet, Centerset

Select Image Insert

Search:

Part	Descriptions	Quantity	Cost	Standard		Standard AddOn Price		Action
				Retail Price	Member Price	Add-On Retail Price	Add-On Member Price	
48425	SS Lav 3/8 Comp X 1/2 FIP X 20	2.00	3.18	34.50	29.33	34.50	29.33	Delete
48956	1st Hour Labor Rate	1.00	31.00	98.04	83.33	98.04	83.33	Delete
48957	Standard Labor	0.25	25.00	24.51	20.83	24.51	20.83	Delete

# 1.0 General Information

The Price Book editing webpage will be used to update prices for your company. Once the prices have been updated on the webpage and submitted to the Database, you will be able to sync the price book to your technician's iPad.

File Edit View Favorites Tools Help

13HQ001 Master Book search Reset

0.0 100.0 % 200.0 % Submit to Database

Showing 1 to 10 of 288 entries Search: Print Copy Excel CSV PDF

			Price				Account Code	
Item	Description	Cost	Standard Price	Member Price	Standard Add-On Price	Add-On Member Price	Residential Account Code	Commercial Account Code
F00100	Premier Torino Lavatory Faucet, Centerset	129.02	388.29	330.79	334.27	284.12	[40030] Sales Res Plb Repair	[40330] Sales Comm
F00101	Premier Torino Lavatory Faucet, Wide Spread	165.19	486.25	414.06	432.23	367.39	[40030] Sales Res Plb Repair	[40330] Sales Comm
F00110	Premier Sonoma Lavatory Faucet,	121.23	371.48	316.51	317.46	269.84	[40030] Sales Res Plb Repair	[40330] Sales Comm

F00100 Premier Torino Lavatory Faucet, Centerset

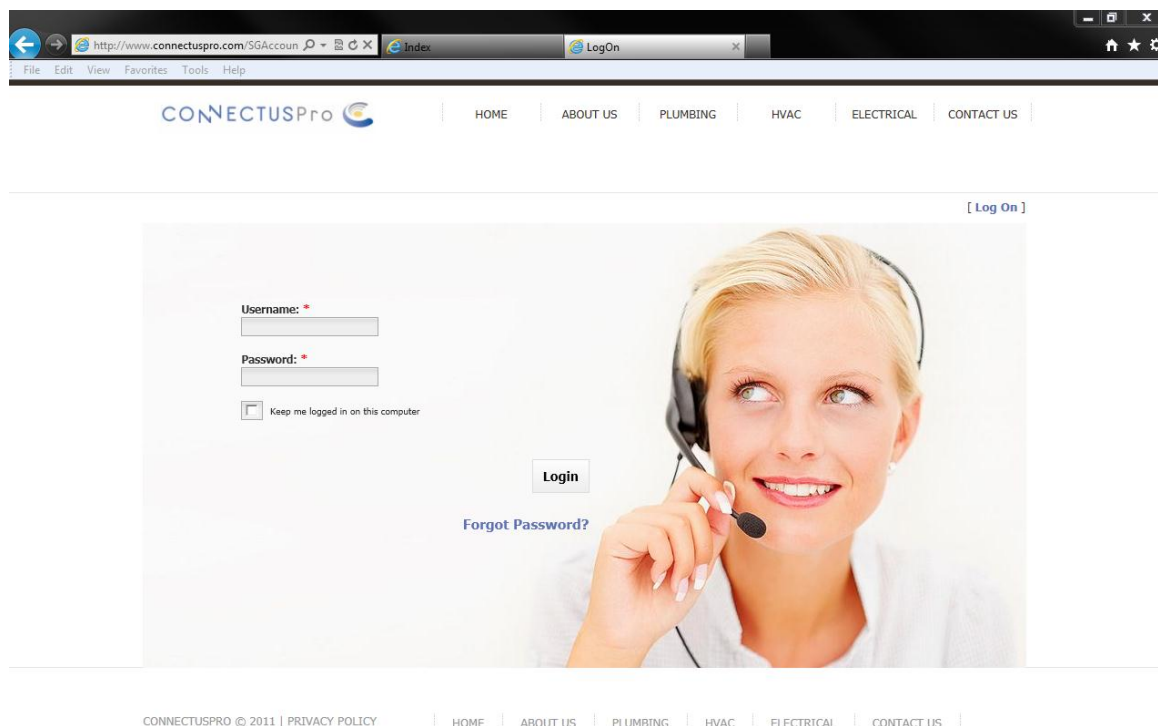
Select Image Insert

Search:

			Standard		Standard Add-On Price		Action	
Part	Descriptions	Quantity	Cost	Retail Price	Member Price	Add-On Retail Price	Add-On Member Price	
48425	SS Lav 3/8 Comp X 1/2 FIP X 20	2.00	3.18	34.50	29.33	34.50	29.33	Delete
48956	1st Hour Labor Rate	1.00	31.00	98.04	83.33	98.04	83.33	Delete
48957	Standard Labor	0.25	25.00	24.51	20.83	24.51	20.83	Delete

## Logging On

This is the Owner's Portal webpage on the ConnectusPro Website. This is where you will go to edit your Price Book.



The screenshot shows a web browser window with the URL <http://www.connectuspro.com/SGAccount>. The browser's address bar shows the URL, and the page title is "Index". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The page features the ConnectusPro logo and a navigation menu with links: HOME, ABOUT US, PLUMBING, HVAC, ELECTRICAL, and CONTACT US. A "[ Log On ]" link is visible in the top right corner. The main content area displays a login form with the following fields and options:

- Username: \* (text input field)
- Password: \* (password input field)
- ☐ Keep me logged in on this computer
- Login button
- [Forgot Password?](#)

The background of the login form features a smiling woman wearing a headset, suggesting customer support. The footer of the page includes the copyright notice "CONNECTUSPRO © 2011 | PRIVACY POLICY" and a repeat of the navigation menu: HOME, ABOUT US, PLUMBING, HVAC, ELECTRICAL, and CONTACT US.

## 2.0 Logging On

This section will instruct you in how to log into the Owner's Portal on the ConnectusPro website in order to see the Price Book

### 2.1 Owner's Portal Login

1. Go to [www.connectuspro.com](http://www.connectuspro.com) to view the ConnectusPro website. Click on the "Contact Us" tab at the top of the landing page.



2. Click on the “Log On” link. This will allow you to enter your username and password to get into the Owner’s Portal.

CONNECTUSPro

HOME ABOUT US PLUMBING HVAC ELECTRICAL CONTACT US

[ Log On ]

Are you ready for ConnectusPro to transform your business? Just fill out the information below and one of our business development consultants will contact you shortly with all the details on how you can become a ConnectusPro Business Partner.

Enter Your Name:  
Enter Your E-mail:  
Enter Your Phone:  
Enter Your Cell Phone: (Private Text Response)  
Enter Your State:

Enter Your Message:

Clear Submit

You can also call us right now at 281-492-3045 to speak to a representative about how we can help make you a better business today!

CONNECTUSPRO © 2011 | PRIVACY POLICY HOME ABOUT US PLUMBING HVAC ELECTRICAL CONTACT US

3. Enter your Username and Password and click Login

CONNECTUSPro

HOME ABOUT US PLUMBING HVAC ELECTRICAL CONTACT US

[ Log On ]

Username: \*  
Password: \*

☐ Keep me logged in on this computer

Login

Forgot Password?

CONNECTUSPRO © 2011 | PRIVACY POLICY HOME ABOUT US PLUMBING HVAC ELECTRICAL CONTACT US



4. On the Owner's Portal Home Page, you can access the price book in two ways:
- Click "My Pricebook" on the left navigation pane, or
  - Click the "My Master Data" icon and then click the "My Pricebook" icon on the subsequent screen.



## Price Book Home Screen

This is the Price Book home screen. This is where you will begin editing your price book.

The screenshot displays the Price Book Home Screen software interface. At the top, there is a menu bar with options: File, Edit, View, Favorites, Tools, and Help. Below the menu bar, a search bar contains the text "13HQ001" and a dropdown menu set to "Master Book". To the right of the search bar are "search" and "Reset" buttons. A progress bar below the search bar shows 0.0, 100.0 %, and 200.0 %.

On the left side, there is a tree view of categories with checkboxes and expand/collapse icons. The categories include:

- CustomerOptions Bath Fixtures
- CustomerOptions Drain Cleaning
- CustomerOptions Drain Line Repair
- CustomerOptions Kitchen & Bar Fixtures
- CustomerOptions Laundry Fixtures
- CustomerOptions Tankless Water Heaters
- CustomerOptions Water Heaters
- Electrical Repairs
- Gas Line
- Heating - Hydronics and Boilers
- Home Warranty (First American)
- HomeGuard Member Plans
- HVAC
- Miscellaneous
- Smoke & CO1 Detectors
- Venting - Furnace and Boiler
- Venting - Water Heaters
- Water Lines, Valves, and Treatment
- Well & Pump

The main area displays a table of items. The table has columns for Item, Description, Cost, Standard Price, Member Price, Standard AddOn Price, Add-On Member Price, Residential Account Code, and Commercial Account Code. The table shows 1 to 10 of 288 entries. The first three entries are:

Item	Description	Cost	Standard Price	Member Price	Standard AddOn Price	Add-On Member Price	Residential Account Code	Commercial Account Code
F00100	Premier Torino Lavatory Faucet, Centerset	129.02	388.29	330.79	334.27	284.12	[40030] Sales Res Plb Repair	[40330] Sales Comm
F00101	Premier Torino Lavatory Faucet, Wide Spread	165.19	486.25	414.06	432.23	367.39	[40030] Sales Res Plb Repair	[40330] Sales Comm
F00110	Premier Sonoma Lavatory Faucet,	121.23	371.48	316.51	317.46	269.84	[40030] Sales Res Plb Repair	[40330] Sales Comm

Below the table, there is a section for "F00100 Premier Torino Lavatory Faucet, Centerset". It includes a "Select Image" button and an "Insert" button. Below these buttons is another table with columns for Part, Descriptions, Quantity, Cost, Standard Retail Price, Standard Member Price, Standard AddOn Price, Standard AddOn Member Price, and Action. The table shows three entries:

Part	Descriptions	Quantity	Cost	Standard Retail Price	Standard Member Price	Standard AddOn Price	Standard AddOn Member Price	Action
48425	SS Lav 3/8 Comp X 1/2 FIP X 20	2.00	3.18	34.50	29.33	34.50	29.33	Delete
48956	1st Hour Labor Rate	1.00	31.00	98.04	83.33	98.04	83.33	Delete
48957	Standard Labor	0.25	25.00	24.51	20.83	24.51	20.83	Delete

### 3.0 Price Book Home Screen

There are 3 basic areas of the webpage that will give you varied levels of detail on the price book: Table of Contents, Section Detail, and Task Detail.

**Table of Contents:** area located on the top left of the webpage; will be used to navigate the price book, as well as to edit the labels of sections, subsections, and tasks. Editing will consist of renaming titles, as well as activating/inactivating titles.

**Section Detail:** area located at top right of webpage; will provide you with detailed information on the section currently selected in the table of contents, including cost, price, and account code. In this section you will be able to manage the prices of certain tasks.

**Task Detail:** area located at the bottom of the webpage; will give you a breakdown of typical materials used to complete given tasks in the price book. In this section you can add or delete materials, pictures, and labor rates.

The screenshot displays the Price Book Home Screen with three main sections highlighted by callouts:

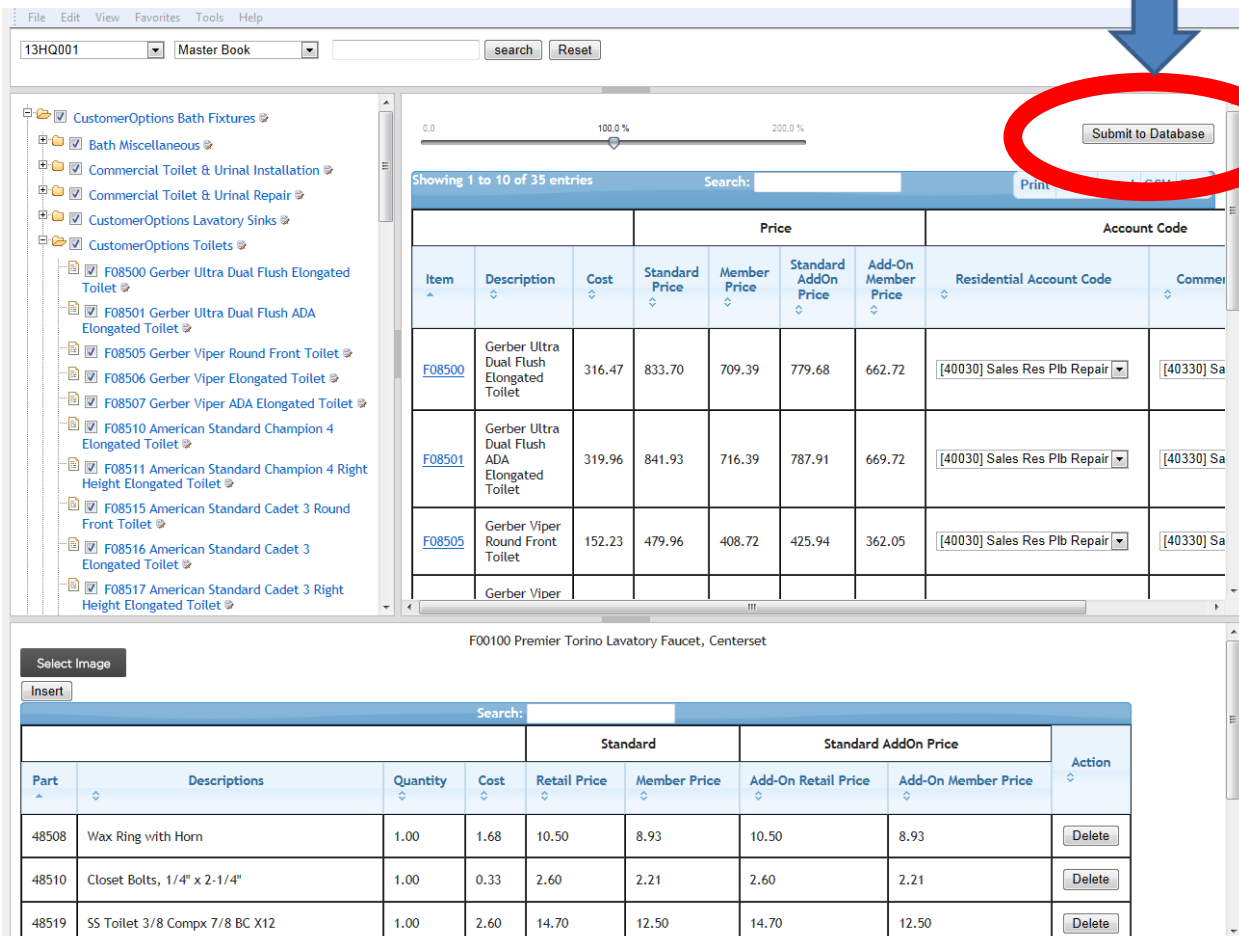
- Table of Contents:** A sidebar on the left containing a list of categories and tasks, such as "CustomerOptions Bath Fixtures", "Electrical Repairs", and "HVAC".
- Section Detail:** The main content area at the top right, showing a table of items with columns for Item, Description, Cost, Standard Price, Member Price, Standard AddOn Price, Add-On Member Price, Residential Account Code, and Commercial Account Code. The table lists items like "Premier Torino Lavatory Faucet, Centerset" and "Premier Sonoma Lavatory Faucet".
- Task Detail:** The bottom section, showing a table of materials and labor rates for a selected task. The table includes columns for Part, Descriptions, Quantity, Cost, Retail Price, Member Price, Add-On Retail Price, Add-On Member Price, and an Action column with a "Delete" button.

Below is the data from the Task Detail table:

Part	Descriptions	Quantity	Cost	Retail Price	Member Price	Add-On Retail Price	Add-On Member Price	Action
48425	55 Lav 3/8 Comp X 1/2 FIP X 20	2.00	3.18	34.50	29.33	34.50	29.33	Delete
48956	1st Hour Labor Rate	1.00	31.00	98.04	83.33	98.04	83.33	Delete
48957	Standard Labor	0.25	25.00	24.51	20.83	24.51	20.83	Delete

### 3.1 Saving Changes to Price Book

No changes made in the Price Book will be saved to the database unless the “Submit to Database” button is pressed. You must press this when you are finished making adjustments to your Price Book if you wish to keep the changes. Ensure that all changes made are complete and accurate before pressing “Submit to Database” because once submitted, you must manually readjust the price book to undo the changes you have saved.



The screenshot displays the Price Book software interface. At the top, there is a menu bar (File, Edit, View, Favorites, Tools, Help) and a search bar with a 'search' button. Below the search bar, a list of categories is shown on the left, including 'CustomerOptions Bath Fixtures', 'Bath Miscellaneous', 'Commercial Toilet & Urinal Installation', 'Commercial Toilet & Urinal Repair', 'CustomerOptions Lavatory Sinks', and 'CustomerOptions Toilets'. The main area displays a table of items with columns for Item, Description, Cost, Standard Price, Member Price, Standard AddOn Price, Add-On Member Price, Residential Account Code, and Comments. A 'Submit to Database' button is circled in red, and a blue arrow points to it from the right. Below the main table, there is a section for 'F00100 Premier Torino Lavatory Faucet, Centerset' with a 'Select Image' button and an 'Insert' button. This section also contains a table with columns for Part, Descriptions, Quantity, Cost, Retail Price, Member Price, Add-On Retail Price, Add-On Member Price, and Action (Delete).

Item	Description	Cost	Standard Price	Member Price	Standard AddOn Price	Add-On Member Price	Residential Account Code	Comments
F08500	Gerber Ultra Dual Flush Elongated Toilet	316.47	833.70	709.39	779.68	662.72	[40030] Sales Res Plb Repair	[40330] Sa
F08501	Gerber Ultra Dual Flush ADA Elongated Toilet	319.96	841.93	716.39	787.91	669.72	[40030] Sales Res Plb Repair	[40330] Sa
F08505	Gerber Viper Round Front Toilet	152.23	479.96	408.72	425.94	362.05	[40030] Sales Res Plb Repair	[40330] Sa
	Gerber Viper							

Part	Descriptions	Quantity	Cost	Retail Price	Member Price	Add-On Retail Price	Add-On Member Price	Action
48508	Wax Ring with Horn	1.00	1.68	10.50	8.93	10.50	8.93	Delete
48510	Closet Bolts, 1/4" x 2-1/4"	1.00	0.33	2.60	2.21	2.60	2.21	Delete
48519	SS Toilet 3/8 Comp 7/8 BC X12	1.00	2.60	14.70	12.50	14.70	12.50	Delete

## 3.2 Resizing the Home Screen Sections

The home screen sections may be re-sized to expand each section to make it easier to read. Place your pointer over the gray areas in between the 3 sections (circled in red below). Click and drag the lines up, down, left, or right, depending on the area you would like to resize.

The screenshot shows a software interface with a menu on the left, a main data table, and a detailed view at the bottom. Red circles highlight the gray areas between the menu and the main table, and between the main table and the detailed view, indicating where to click and drag to resize the sections.

Item	Description	Cost	Standard Price	Member Price	Standard AddOn Price	Add-On Member Price	Residential Account Code	Commercial Account Code
H01420	Bradford White 50 Gallon Electric Water Heater	334.58	1031.30	877.34	977.28	830.67	[40040] Sales Res Water Hea	[40340] Sales
H01500	Bradford White 30 Gallon Low Boy Electric Water Heater	406.80	1200.97	1021.56	1146.95	974.89	[40040] Sales Res Water Hea	[40340] Sales
Bradford								

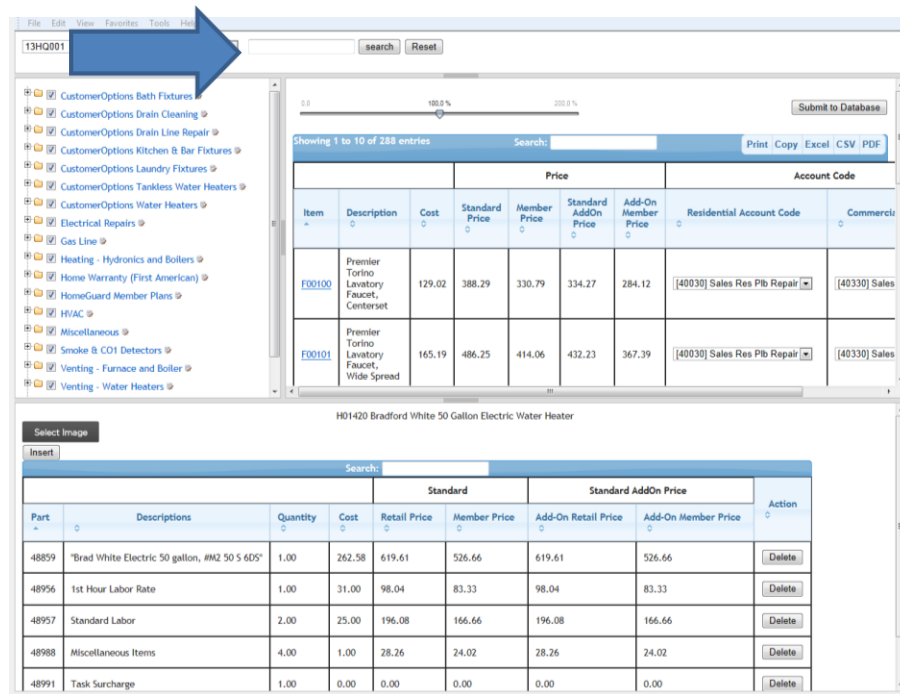
H01420 Bradford White 50 Gallon Electric Water Heater

Part	Descriptions	Quantity	Cost	Retail Price	Member Price	Add-On Retail Price	Add-On Member Price	Action
48859	"Brad White Electric 50 gallon, #M2 50 S 6DS"	1.00	262.58	619.61	526.66	619.61	526.66	Delete
48956	1st Hour Labor Rate	1.00	31.00	98.04	83.33	98.04	83.33	Delete
48957	Standard Labor	2.00	25.00	196.08	166.66	196.08	166.66	Delete

*If you double click on the gray area, it will hide the section on the side or bottom of the webpage. Double click again to make the area appear.*

### 3.3 Searching for Items

The powerful search function allows you to quickly and easily find any sections, sub-sections, parts or tasks that contain the characters or words you use in the search box. Simply type keywords into the search box at the top of the webpage and click the search button to search for specific items (i.e. Toto Dual Flush Toilet), or groups of items (i.e. toilet).



13HQ001

Search: [ ] Reset

Showing 1 to 10 of 288 entries

Item	Description	Cost	Standard Price	Member Price	Standard Add-On Price	Add-On Member Price	Residential Account Code	Commercial Account Code
F00100	Premier Torino Lavatory Faucet, Centerset	129.02	388.29	330.79	334.27	284.12	[40030] Sales Res Pib Repair	[40330] Sales
F00101	Premier Torino Lavatory Faucet, Wide Spread	165.19	486.25	414.06	432.23	367.39	[40030] Sales Res Pib Repair	[40330] Sales

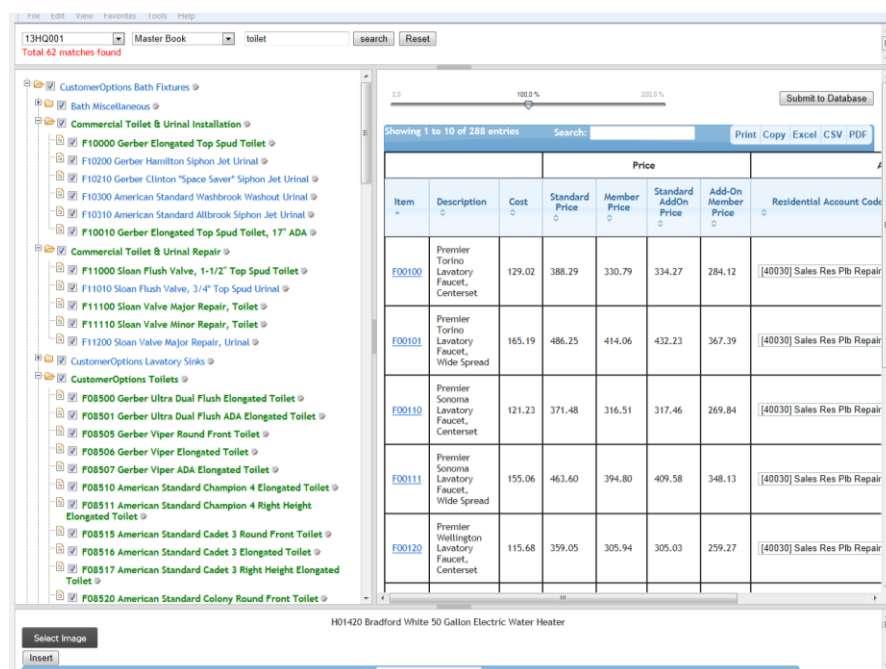
HD1420 Bradford White 50 Gallon Electric Water Heater

Select Image

Insert

Part	Descriptions	Quantity	Cost	Retail Price	Member Price	Add-On Retail Price	Add-On Member Price	Action
48859	"Brad White Electric 50 gallon, #M2 50 S 60S"	1.00	262.58	619.61	526.66	619.61	526.66	Delete
48956	1st Hour Labor Rate	1.00	31.00	98.04	83.33	98.04	83.33	Delete
48957	Standard Labor	2.00	25.00	196.08	166.66	196.08	166.66	Delete
48988	Miscellaneous Items	4.00	1.00	28.26	24.02	28.26	24.02	Delete
48991	Task Surcharge	1.00	0.00	0.00	0.00	0.00	0.00	Delete

Results will appear highlighted in green in the Table of Contents area.



13HQ001

Master Book

toilet

search Reset

Total 62 matches found

Showing 1 to 10 of 288 entries

Item	Description	Cost	Standard Price	Member Price	Standard Add-On Price	Add-On Member Price	Residential Account Code	Commercial Account Code
F00100	Premier Torino Lavatory Faucet, Centerset	129.02	388.29	330.79	334.27	284.12	[40030] Sales Res Pib Repair	
F00101	Premier Torino Lavatory Faucet, Wide Spread	165.19	486.25	414.06	432.23	367.39	[40030] Sales Res Pib Repair	
F00110	Premier Sonoma Lavatory Faucet, Centerset	121.23	371.48	316.51	317.46	269.84	[40030] Sales Res Pib Repair	
F00111	Premier Sonoma Lavatory Faucet, Wide Spread	155.06	463.60	394.80	409.58	348.13	[40030] Sales Res Pib Repair	
F00120	Premier Wellington Lavatory Faucet, Centerset	115.68	359.05	305.94	305.03	259.27	[40030] Sales Res Pib Repair	

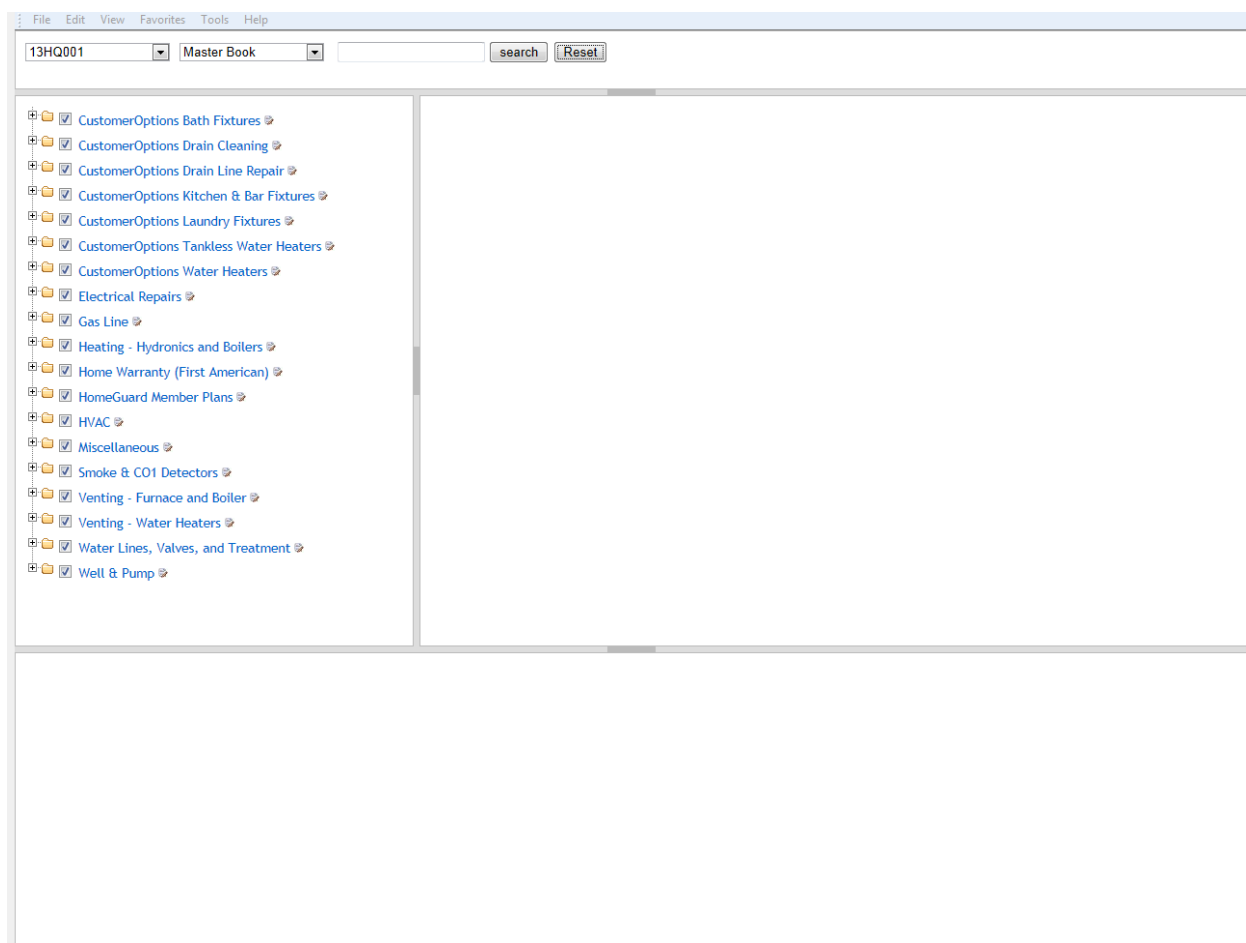
HD1420 Bradford White 50 Gallon Electric Water Heater

Select Image

Insert

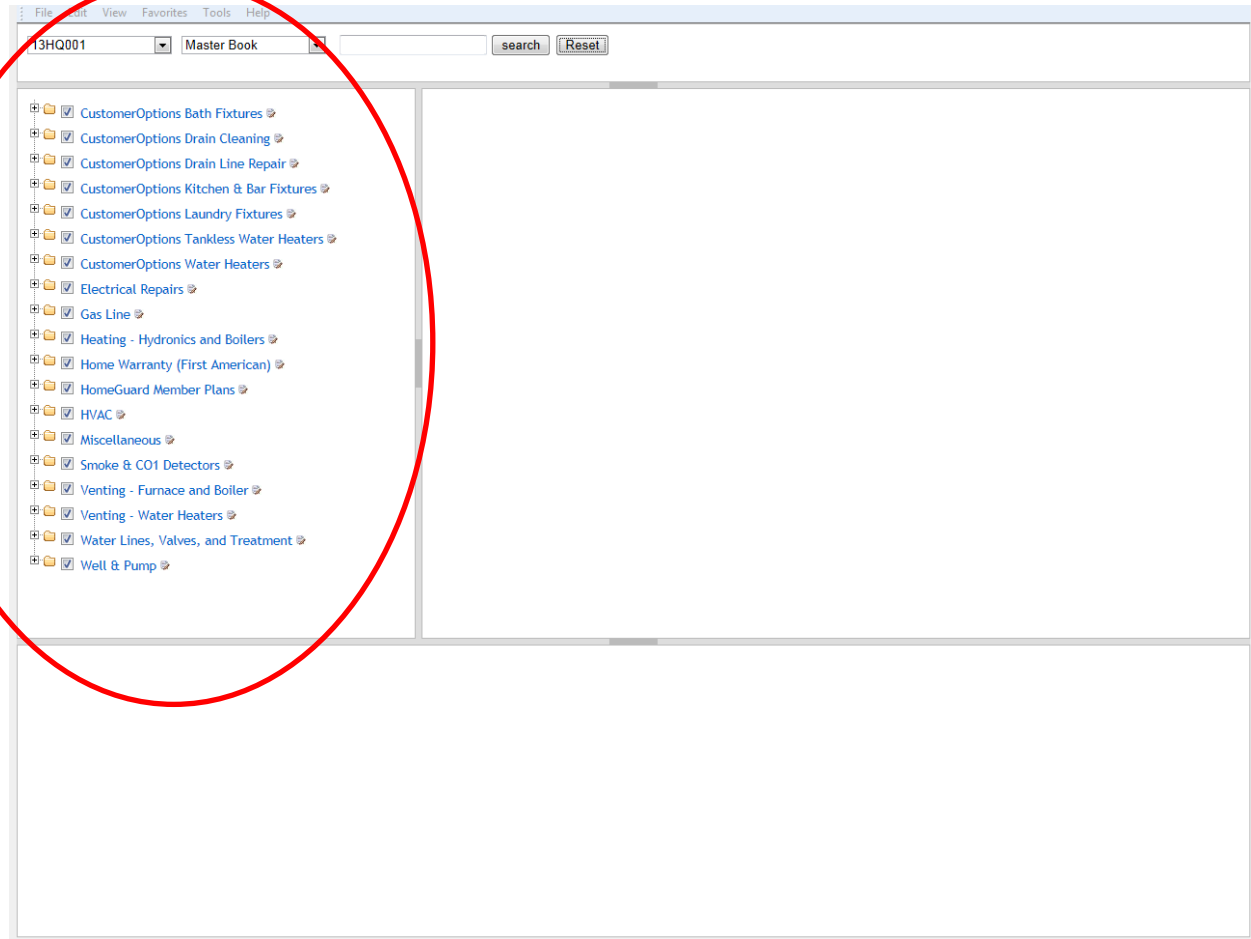
## Table of Contents Area

This is the Table of Contents area. In this area of the webpage you will be able to navigate the price book sections, change the section labels and activate/inactivate areas of the price book.



## 4.0 Table of Contents Area

This is your Table of Contents.

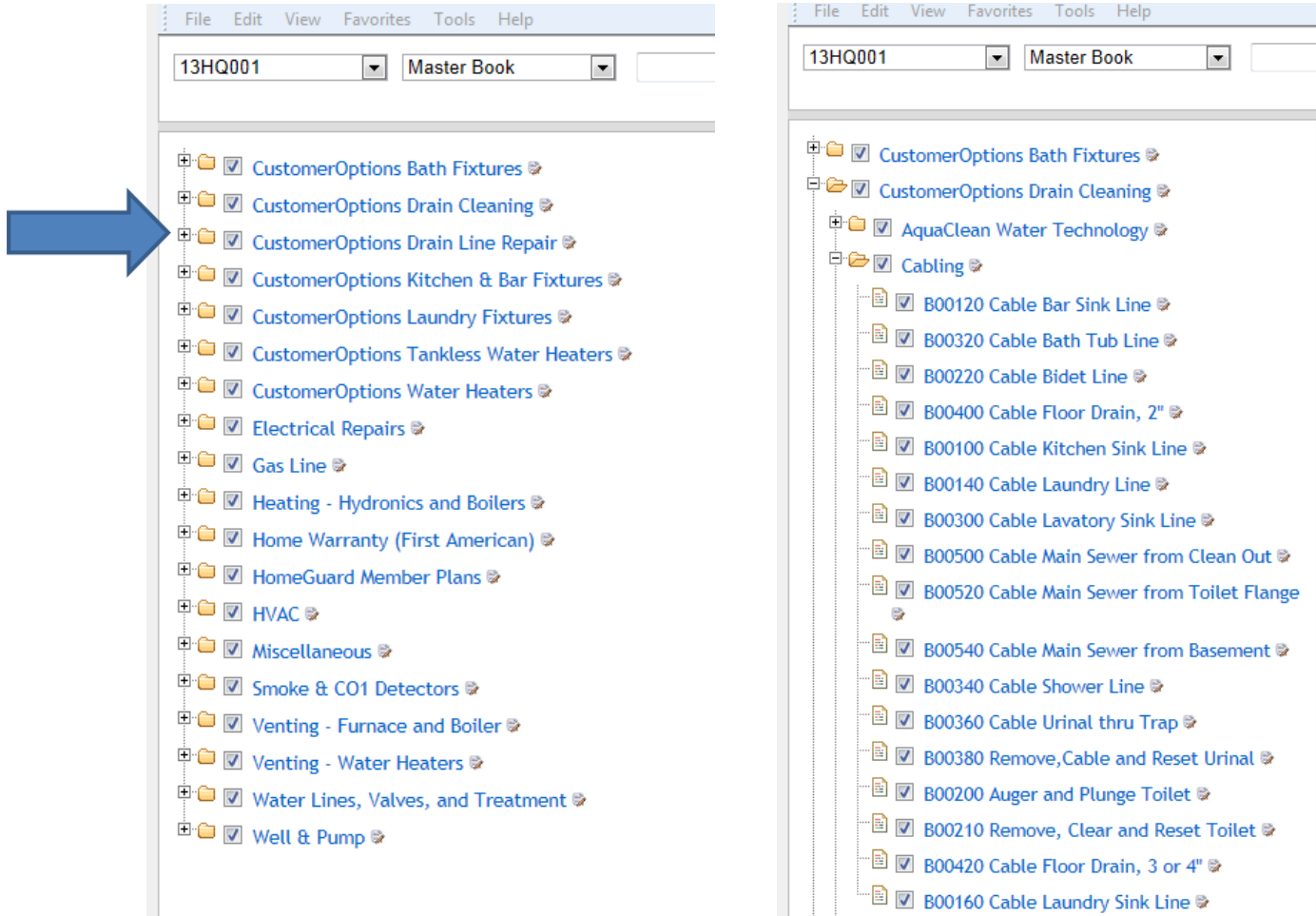




## 4.1 Expanding and Collapsing Sections

Click on the + next to any of the listed categories to expand and view the subsections.

Click on the – next to any of the expanded categories to collapse the category.

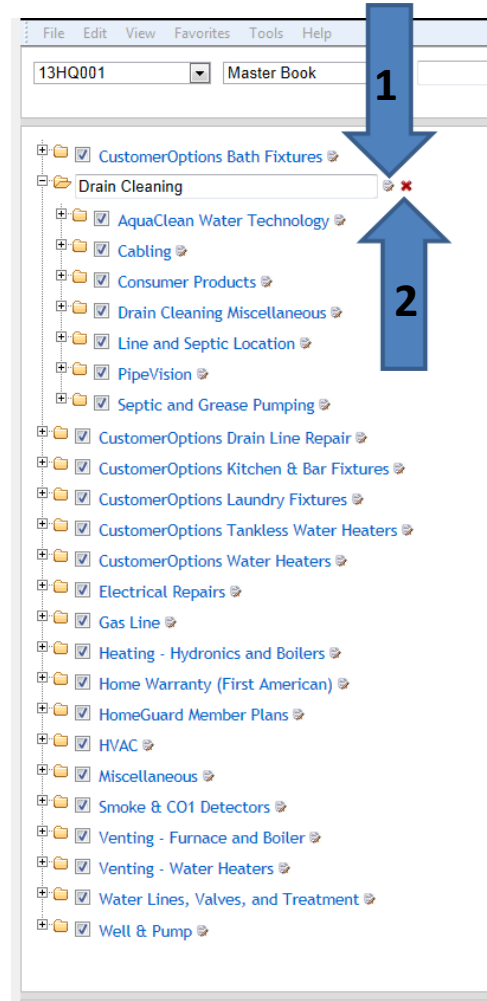
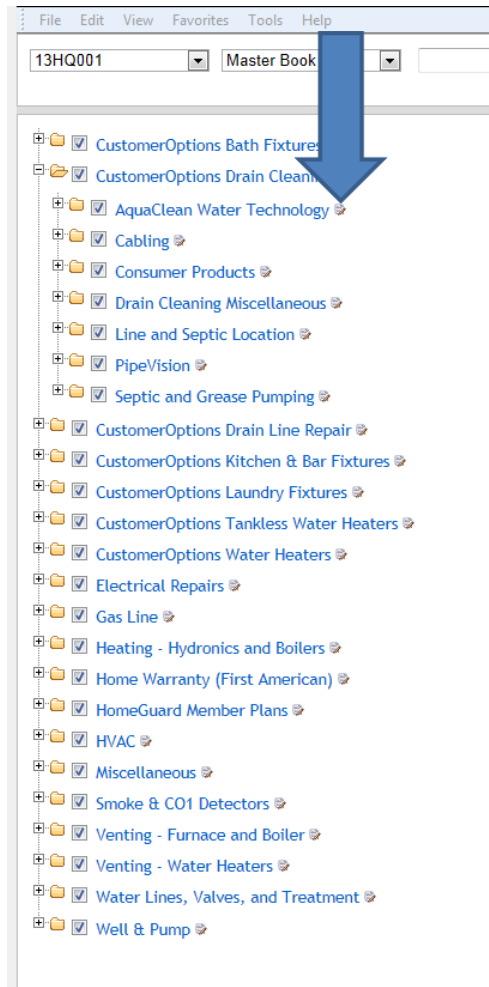


## 4.2 Changing the Display Name of Sections/Subsections/Tasks

The name of any title (Section, Subsection, Task) can be changed by clicking on the icon immediately to the right of the section, subsection, or task title.

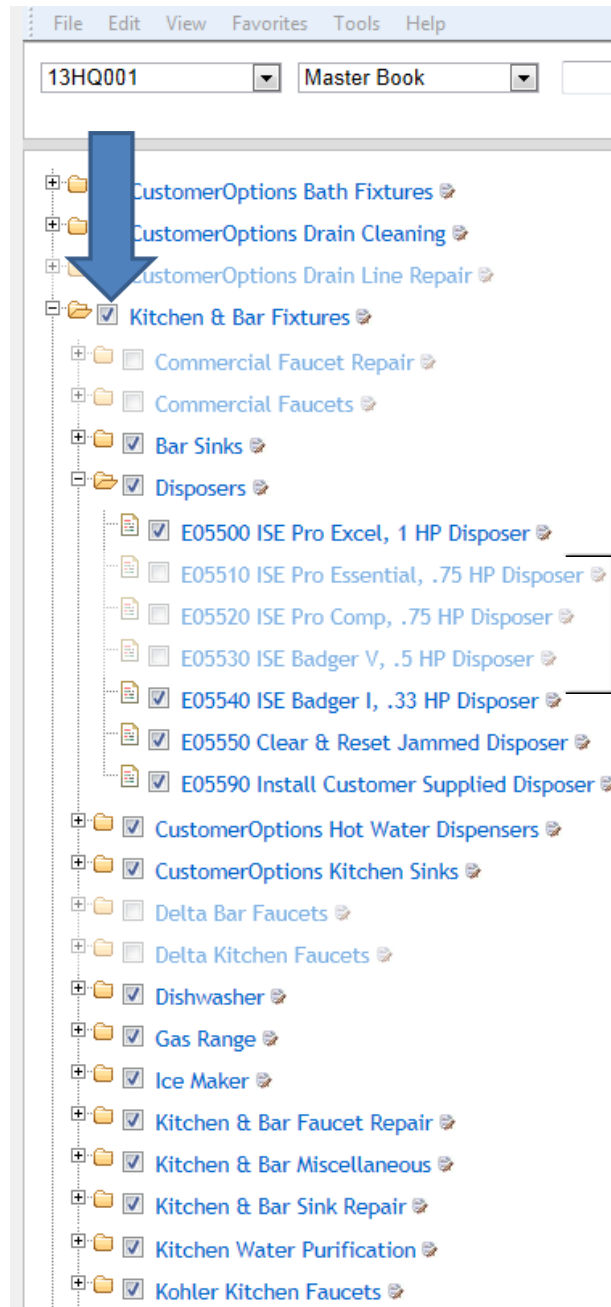
Once the icon has been clicked, you may edit the name of the associated title.

1. To save the new title, click the icon.
2. To cancel the new title, click on the red X.



### 4.3 Making items Active/Inactive

The Price Book can be customized based on the services offered in your business. You may activate and inactivate sections, subsections, or tasks based on the current offerings in your business. By clicking on the checkmark next to the heading, the action will be either “Active” or “Inactive”. “Active” titles appear in dark blue, while “Inactive” titles appear in light blue.



*These tasks are Inactive and will **not** show up on technician's iPad once the changes have been submitted and the iPad has been synced with the price book.*

## Section Detail Area

This is the Section Detail area of the Price Book. In this area you are able to see the price breakdown of each task in the selected category.

File Edit View Favorites Tools Help

13HQ001 Master Book search Reset

0.0 100.0 % 200.0 % Submit to Database

Showing 1 to 10 of 288 entries Search: Print Copy Excel CSV PDF

Item	Description	Cost	Price			Account Code		
			Standard Price	Member Price	Standard AddOn Price	Add-On Member Price	Residential Account Code	Commercial Account Code
F00100	Premier Torino Lavatory Faucet, Centerset	129.02	388.29	330.79	334.27	284.12	[40030] Sales Res Plb Repair	[40330] Sales Comm
F00101	Premier Torino Lavatory Faucet, Wide Spread	165.19	486.25	414.06	432.23	367.39	[40030] Sales Res Plb Repair	[40330] Sales Comm
F00110	Premier Sonoma Lavatory Faucet, Centerset	121.23	371.48	316.51	317.46	269.84	[40030] Sales Res Plb Repair	[40330] Sales Comm

Select Image Insert

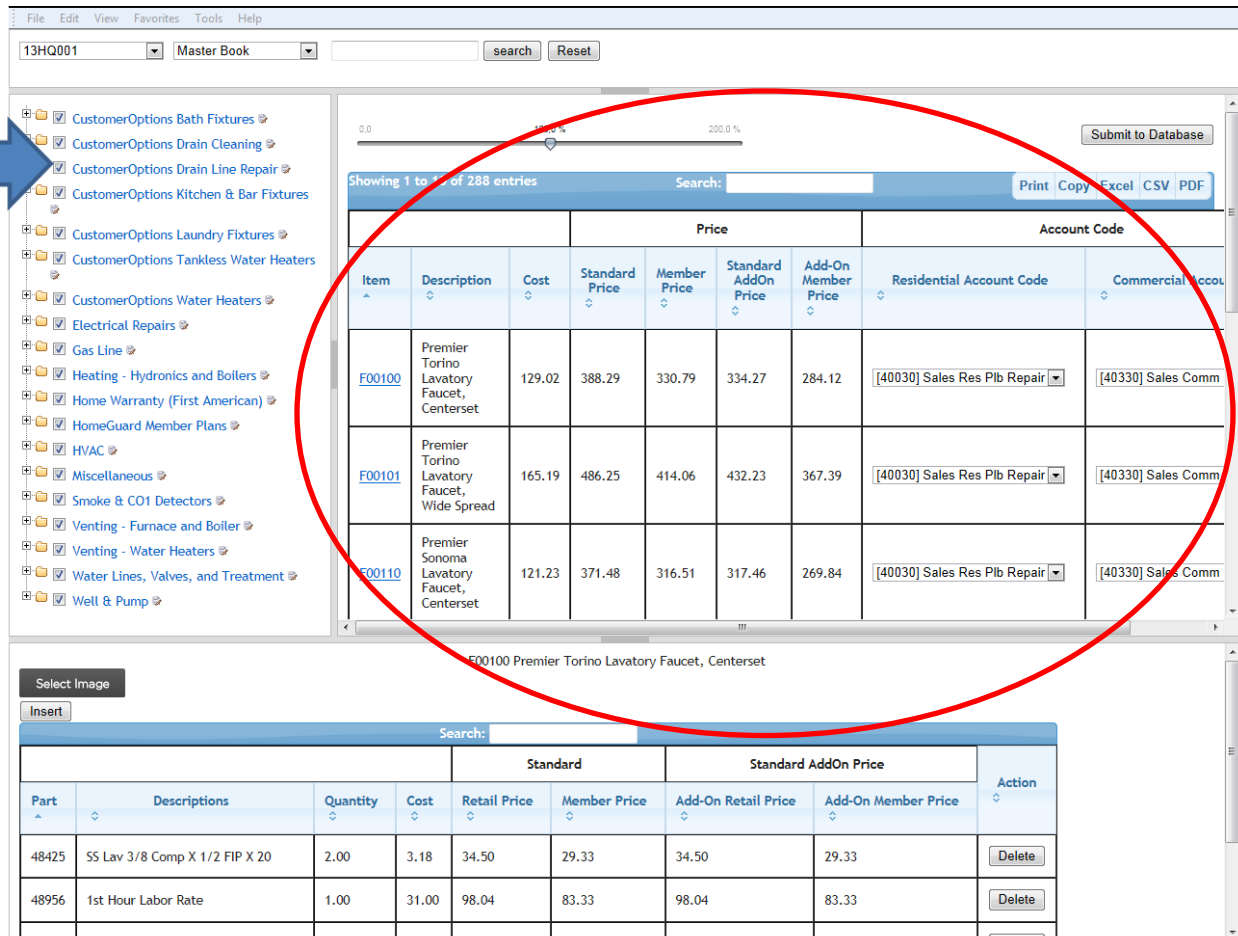
F00100 Premier Torino Lavatory Faucet, Centerset

Search:

Part	Descriptions	Quantity	Cost	Standard		Standard AddOn Price		Action
				Retail Price	Member Price	Add-On Retail Price	Add-On Member Price	
48425	SS Lav 3/8 Comp X 1/2 FIP X 20	2.00	3.18	34.50	29.33	34.50	29.33	Delete
48956	1st Hour Labor Rate	1.00	31.00	98.04	83.33	98.04	83.33	Delete

## 5.0 Section Detail Area

In order to display data in this area, click on the blue section or subsection in the Table of Contents area.



The screenshot shows a software interface with a sidebar on the left containing a list of services. A blue arrow points to this sidebar. The main area displays a table of items, with a red circle highlighting the table content. Below the table, there is a section for a specific item, '500100 Premier Torino Lavatory Faucet, Centerset', which includes a table of prices and an 'Action' column.

**Table 1: Main Item List**

Item	Description	Cost	Standard Price	Member Price	Standard AddOn Price	Add-On Member Price	Residential Account Code	Commercial Account Code
F00100	Premier Torino Lavatory Faucet, Centerset	129.02	388.29	330.79	334.27	284.12	[40030] Sales Res Plb Repair	[40330] Sales Comm
F00101	Premier Torino Lavatory Faucet, Wide Spread	165.19	486.25	414.06	432.23	367.39	[40030] Sales Res Plb Repair	[40330] Sales Comm
F00110	Premier Sonoma Lavatory Faucet, Centerset	121.23	371.48	316.51	317.46	269.84	[40030] Sales Res Plb Repair	[40330] Sales Comm

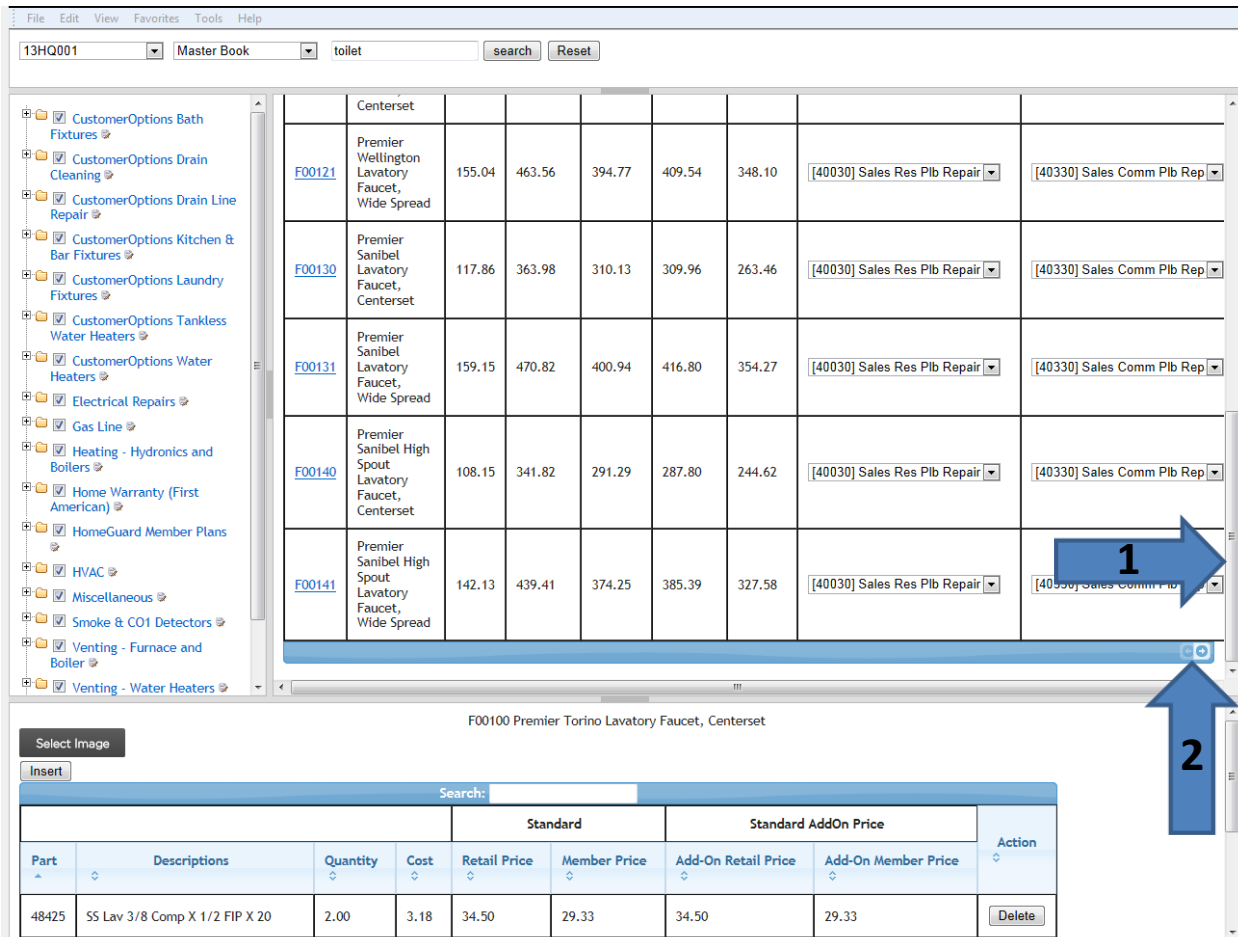
**Table 2: Item Details (500100 Premier Torino Lavatory Faucet, Centerset)**

Part	Descriptions	Quantity	Cost	Standard		Standard AddOn Price		Action
				Retail Price	Member Price	Add-On Retail Price	Add-On Member Price	
48425	SS Lav 3/8 Comp X 1/2 FIP X 20	2.00	3.18	34.50	29.33	34.50	29.33	Delete
48956	1st Hour Labor Rate	1.00	31.00	98.04	83.33	98.04	83.33	Delete

## 5.1 Page Forward/Page Back

The Section Detail area only displays 10 tasks at a time. In order to navigate through the total # of entries, do the following:

1. Scroll to the bottom of the area.
2. Click the forward or back arrow to jump to the next/previous 10 items.



The screenshot shows a software interface with a menu on the left and a main area displaying a list of tasks. The menu includes categories like CustomerOptions Bath Fixtures, CustomerOptions Drain Cleaning, CustomerOptions Drain Line Repair, CustomerOptions Kitchen & Bar Fixtures, CustomerOptions Laundry Fixtures, CustomerOptions Tankless Water Heaters, CustomerOptions Water Heaters, Electrical Repairs, Gas Line, Heating - Hydronics and Boilers, Home Warranty (First American), HomeGuard Member Plans, HVAC, Miscellaneous, Smoke & CO1 Detectors, Venting - Furnace and Boiler, and Venting - Water Heaters.

The main area displays a list of tasks. The tasks are listed in a table with columns for ID, Description, and various pricing fields. The tasks are sorted by ID, and the list is paginated. A blue arrow labeled '1' points to the bottom of the task list, and another blue arrow labeled '2' points to the navigation arrows at the bottom of the task list.

ID	Description	Price	Cost	Member Price	Standard AddOn Price	Action	
F00121	Premier Wellington Lavatory Faucet, Wide Spread	155.04	463.56	394.77	409.54	348.10	[40030] Sales Res Plb Repair [40330] Sales Comm Plb Rep
F00130	Premier Sanibel Lavatory Faucet, Centerset	117.86	363.98	310.13	309.96	263.46	[40030] Sales Res Plb Repair [40330] Sales Comm Plb Rep
F00131	Premier Sanibel Lavatory Faucet, Wide Spread	159.15	470.82	400.94	416.80	354.27	[40030] Sales Res Plb Repair [40330] Sales Comm Plb Rep
F00140	Premier Sanibel High Spout Lavatory Faucet, Centerset	108.15	341.82	291.29	287.80	244.62	[40030] Sales Res Plb Repair [40330] Sales Comm Plb Rep
F00141	Premier Sanibel High Spout Lavatory Faucet, Wide Spread	142.13	439.41	374.25	385.39	327.58	[40030] Sales Res Plb Repair [40550] Sales Comm Plb Rep

The detailed view shows the task F00100 Premier Torino Lavatory Faucet, Centerset. It includes a search bar and a table with columns for Part, Descriptions, Quantity, Cost, Retail Price, Member Price, Add-On Retail Price, Add-On Member Price, and Action.

Part	Descriptions	Quantity	Cost	Retail Price	Member Price	Add-On Retail Price	Add-On Member Price	Action
48425	SS Lav 3/8 Comp X 1/2 FIP X 20	2.00	3.18	34.50	29.33	34.50	29.33	Delete

## 5.2 Updating Prices in Price Book

The prices in the Price Book can be updated in a number of ways. The easiest and quickest way is to use the Profit Bar at the top of the Section Detail area.

### 5.2.1 Updating Prices by Section

To update a specific section (i.e. Bath Fixtures) do the following:

1. Select the section from the table of contents on the left side to display all tasks in that section.
2. Move the Price Slider and the price will go up or down respectively for the entire section chosen. Simply click on the marker and drag to the left to turn the prices down, or drag to the right to turn the prices up.
3. Once the prices are at your chosen level, press the Submit to Database Button in order to ensure the price gets saved.

The screenshot shows the Price Book software interface. On the left, a sidebar lists various sections, with 'CustomerOptions Bath Fixtures' selected. The main area displays a table of items with prices. A price slider at the top is set to 100.0%, and the 'Submit to Database' button is visible. Blue arrows 1, 2, and 3 indicate the steps: 1. Select the section, 2. Move the Price Slider, and 3. Press the Submit to Database button.

		Price					Account Code	
Item	Description	Cost	Standard Price	Member Price	Standard AddOn Price	Add-On Member Price	Residential Account Code	Commercial Account Code
F00100	Premier Torino Lavatory Faucet, Centerset	129.02	388.29	330.79	334.27	284.12	[40030] Sales Res Plb Repair	[40330] Sales Comm Plb Rep
F00101	Premier Torino Lavatory Faucet, Wide Spread	165.19	486.25	414.06	432.23	367.39	[40030] Sales Res Plb Repair	[40330] Sales Comm Plb Rep
F00110	Premier Sonoma Lavatory Faucet, Centerset	121.23	371.48	316.51	317.46	269.84	[40030] Sales Res Plb Repair	[40330] Sales Comm Plb Rep
F00111	Premier Sonoma Lavatory Faucet, Wide Spread	155.06	463.60	394.80	409.58	348.13	[40030] Sales Res Plb Repair	[40330] Sales Comm Plb Rep
F00120	Premier Wellington Lavatory Faucet, Centerset	115.68	359.05	305.94	305.03	259.27	[40030] Sales Res Plb Repair	[40330] Sales Comm Plb Rep
F00121	Premier Wellington Lavatory Faucet	155.04	463.56	394.77	409.54	348.10	[40030] Sales Res Plb Repair	[40330] Sales Comm Plb Rep

## 5.2.2 Updating Prices by Subsection

To update a specific subsection (i.e. Toilets) do the following:

1. Select the subsection from the table of contents on the left side to display the tasks associated.
2. You will then use the Price Slider to increase or decrease the price of the associated subsection.
3. Press the Submit to Database Button in order to ensure the price changes get saved.

The screenshot shows the software interface with the following components:

- Left Sidebar (Table of Contents):** A list of subsections including CustomerOptions Bath Fixtures, Bath Miscellaneous, Commercial Toilet & Urinal Installation, Commercial Toilet & Urinal Repair, CustomerOptions Lavatory Sinks, **CustomerOptions Toilets** (highlighted with arrow 1), CustomerOptions Tub & Shower, Delta Lavatory Faucets, Delta Tub & Shower Faucets, Grohe Lavatory Faucets, Kohler Lavatory Faucets, Kohler Tub & Shower Faucets, Lavatory Faucet Repair, Lavatory Sink Repairs, Moen Lavatory Faucets, Moen Tub & Shower Faucets, and Premier Lavatory.
- Top Bar:** Includes a search bar with '13HQ001' and 'Master Book' dropdowns, a 'search' button, a 'Reset' button, and a 'Submit to Database' button (indicated by arrow 3).
- Price Slider:** A slider at the top center showing a range from 0.0 to 200.0%, with a current value of 100.0% (indicated by arrow 2).
- Main Table:** A table titled 'Showing 1 to 10 of 35 entries' with columns for Item, Description, Cost, Standard Price, Member Price, Standard Add-On Price, Add-On Member Price, Residential Account Code, and Commercial Account Code. The table lists several Gerber Ultra and Gerber Viper toilet models with their respective prices and account codes.



### 5.2.3 Updating Prices by Individual Task

To update the price of an individual task or material, do the following:

1. If you know the exact name of the task you wish to change and which Section it is in, select the Section and type the name of the task in the search bar at the top of the Section Detail area. Note: Make sure that you have the correct Section selected or results will not appear. This type of search must be for a unique name in order to return one specific result (e.g. F08500 Gerber Ultra Flush Elongated Toilet). You may also search for, and select, tasks using the search function described in Section 3.3 of this manual.
2. Once the specific task is selected, you will then be able to slide the profit bar up or down to update the price of the individual task.
3. Press the Submit to Database Button in order to ensure the price gets saved.

The screenshot displays the software interface for updating prices. At the top, there is a search bar with the text 'F08500 gerber ultra flush' and a 'Search' button. Below the search bar, a table lists the search results. The table has columns for Item, Description, Cost, Standard Price, Member Price, Standard AddOn Price, Add-On Member Price, Residential Account Code, and Commercial Account Code. The first row shows 'F08500 Gerber Ultra Dual Flush Elongated Toilet' with a cost of 316.47 and a standard price of 833.70. Below the table, there is a 'Submit to Database' button. At the bottom of the screenshot, there is a section titled 'F08500 Gerber Ultra Dual Flush Elongated Toilet' which contains a table with columns for Part, Descriptions, Quantity, Cost, Retail Price, Member Price, Add-On Retail Price, Add-On Member Price, and Action. This section is used for editing the specific task's details.

Item	Description	Cost	Standard Price	Member Price	Standard AddOn Price	Add-On Member Price	Residential Account Code	Commercial Account Code
F08500	Gerber Ultra Dual Flush Elongated Toilet	316.47	833.70	709.39	779.68	662.72	[40030] Sales Res Plb Repair	[40330] Sales Comm Plb Rep

Part	Descriptions	Quantity	Cost	Retail Price	Member Price	Add-On Retail Price	Add-On Member Price	Action

## Task Detail Area

This is the Task Detail area of the Price Book. Use this area to view and make changes to the specific parts associated with each task.

File Edit View Favorites Tools Help

13HQ001 Master Book copper search Reset

0.0 100.0 % 200.0 % Submit to Database

Showing 1 to 10 of 35 entries Search: Print Copy Excel CSV PDF

			Price				Account Code	
Item	Description	Cost	Standard Price	Member Price	Standard AddOn Price	Add-On Member Price	Residential Account Code	Commercial Account
F08500	Gerber Ultra Dual Flush Elongated Toilet	316.47	833.70	709.39	779.68	662.72	[40030] Sales Res Plb Repair	[40330] Sales Comm PI
F08501	Gerber Ultra Dual Flush ADA Elongated Toilet	319.96	841.93	716.39	787.91	669.72	[40030] Sales Res Plb Repair	[40330] Sales Comm PI

Select Image Insert

F08500 Gerber Ultra Dual Flush Elongated Toilet

Search:

Part	Descriptions	Quantity	Cost	Standard		Standard AddOn Price		Action
				Retail Price	Member Price	Add-On Retail Price	Add-On Member Price	
48508	Wax Ring with Horn	1.00	1.68	10.50	8.93	10.50	8.93	Delete
48510	Closet Bolts, 1/4" x 2-1/4"	1.00	0.33	2.60	2.21	2.60	2.21	Delete
48519	SS Toilet 3/8 Comp 7/8 BC X12	1.00	2.60	14.70	12.50	14.70	12.50	Delete
48956	1st Hour Labor Rate	1.00	31.00	98.04	83.33	98.04	83.33	Delete
48957	Standard Labor	0.50	25.00	49.02	41.67	49.02	41.67	Delete

## 6.0 Task Detail Area

In order to display data in this area, click on the blue item # in the Section Detail area.

File Edit View Favorites Tools Help

13HQ001 Master Book copper search Reset

0.0 100.0 % 200.0 % Submit to Database

Showing 1 to 10 of 35 entries Search: Print Copy Excel CSV PDF

			Price				Account Code	
Item	Description	Cost	Standard Price	Member Price	Standard AddOn Price	Add-On Member Price	Residential Account Code	Commercial Account
<a href="#">F08500</a>	Gerber Ultra Dual Flush Elongated Toilet	316.47	833.70	709.39	779.68	662.72	[40030] Sales Res Plb Repair	[40330] Sales Comm PI
<a href="#">F08501</a>	Gerber Ultra Dual Flush ADA Elongated Toilet	319.96	841.93	716.39	787.91	669.72	[40030] Sales Res Plb Repair	[40330] Sales Comm PI

F08500 Gerber Ultra Dual Flush Elongated Toilet

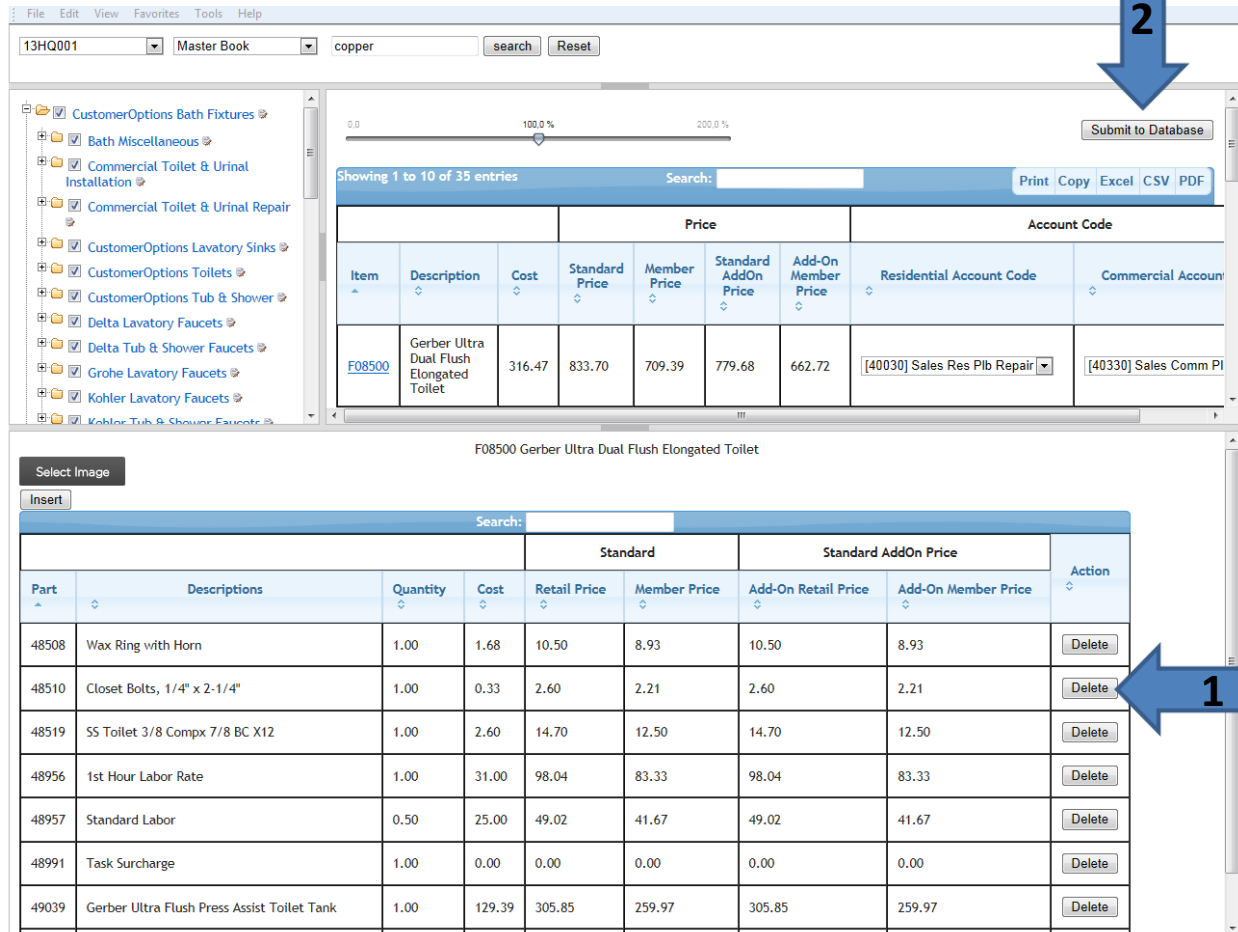
Select Image Insert

			Standard		Standard AddOn Price		Action	
Part	Descriptions	Quantity	Cost	Retail Price	Member Price	Add-On Retail Price		Add-On Member Price
48508	Wax Ring with Horn	1.00	1.68	10.50	8.93	10.50	8.93	Delete
48510	Closet Bolts, 1/4" x 2-1/4"	1.00	0.33	2.60	2.21	2.60	2.21	Delete
48519	SS Toilet 3/8 Comp 7/8 BC X12	1.00	2.60	14.70	12.50	14.70	12.50	Delete
48956	1st Hour Labor Rate	1.00	31.00	98.04	83.33	98.04	83.33	Delete
48957	Standard Labor	0.50	25.00	49.02	41.67	49.02	41.67	Delete

## 6.1 Deleting a Part from a Task

With the specific task displayed in the Task Detail area, do the following:

1. Press the Delete button in the same row as the part you want to remove.
2. Press the Submit to Database button to save.



The screenshot shows a software interface with a menu on the left, a search bar at the top, and two main data tables. The top table lists items with prices and account codes. The bottom table, titled 'F08500 Gerber Ultra Dual Flush Elongated Toilet', lists parts with descriptions, quantities, costs, and prices, each with a 'Delete' button. A blue arrow labeled '2' points to the 'Submit to Database' button in the top right. Another blue arrow labeled '1' points to the 'Delete' button in the bottom right of the task details table.

**Top Table: Item Details**

Item	Description	Cost	Standard Price	Member Price	Standard AddOn Price	Add-On Member Price	Residential Account Code	Commercial Account Code
F08500	Gerber Ultra Dual Flush Elongated Toilet	316.47	833.70	709.39	779.68	662.72	[40030] Sales Res Plb Repair	[40330] Sales Comm Pl

**Bottom Table: Task Details (F08500 Gerber Ultra Dual Flush Elongated Toilet)**

Part	Descriptions	Quantity	Cost	Standard Retail Price	Member Price	Standard AddOn Price Add-On Retail Price	Add-On Member Price	Action
48508	Wax Ring with Horn	1.00	1.68	10.50	8.93	10.50	8.93	Delete
48510	Closet Bolts, 1/4" x 2-1/4"	1.00	0.33	2.60	2.21	2.60	2.21	Delete
48519	SS Toilet 3/8 Comp 7/8 BC X12	1.00	2.60	14.70	12.50	14.70	12.50	Delete
48956	1st Hour Labor Rate	1.00	31.00	98.04	83.33	98.04	83.33	Delete
48957	Standard Labor	0.50	25.00	49.02	41.67	49.02	41.67	Delete
48991	Task Surcharge	1.00	0.00	0.00	0.00	0.00	0.00	Delete
49039	Gerber Ultra Flush Press Assist Toilet Tank	1.00	129.39	305.85	259.97	305.85	259.97	Delete

## 6.2 Adding a Part to a Task

Click the “Insert” button

The screenshot shows the software interface with a sidebar on the left containing a tree view of categories like 'CustomerOptions Laundry Fixtures', 'Electrical Repairs', and 'HVAC'. The main area displays a table with columns for 'Item', 'Description', 'Cost', 'Standard Price', 'Member Price', 'Standard AddOn Price', 'Add-On Member Price', 'Residential Account Code', and 'Commercial'. A blue arrow points to the 'Insert' button located below the 'Select Image' button.

Item	Description	Cost	Standard Price	Member Price	Standard AddOn Price	Add-On Member Price	Residential Account Code	Commercial
K05500	Goodman Air Handler	1.00	649.32	552.66	595.30	505.99	[41030] Sales - Res HVAC Int	[41130] Sales

Click the dropdown box to see the list of parts

The screenshot shows the 'Insert Part' dialog box open, displaying a list of parts. A blue arrow points to the dropdown menu in the dialog box, which shows the selected part: '[ 53655] Gdman Air Handler, 800CFM 2T'. The dialog box also includes fields for 'Quantity', 'Cost', 'Retail Price', 'Member Price', 'Add-On Retail Price', and 'Add-On Member Price', along with 'Save' and 'Cancel' buttons.

Part	Descriptions	Quantity	Cost	Retail Price	Member Price	Add-On Retail Price	Add-On Member Price	Action
48960	HVAC Labor - 1st Hour	1.00	0.00	98.04	83.33	98.04	83.33	Delete
48961	HVAC Standard Labor	5.00	0.00	490.20	416.65	490.20	416.65	Delete
48988	Miscellaneous Items	1.00	1.00	7.06	6.01	7.06	6.01	Delete
48991	Task Surcharge	1.00	0.00	0.00	0.00	0.00	0.00	Delete

Select the part you would like to add to the assigned task

The screenshot shows the 'Insert Part' dialog box in the software. The dialog has a search bar and a list of parts. The part 'Gdman Air Handler, 800CFM 2T' is selected. The background shows a list of tasks and a table of existing parts.

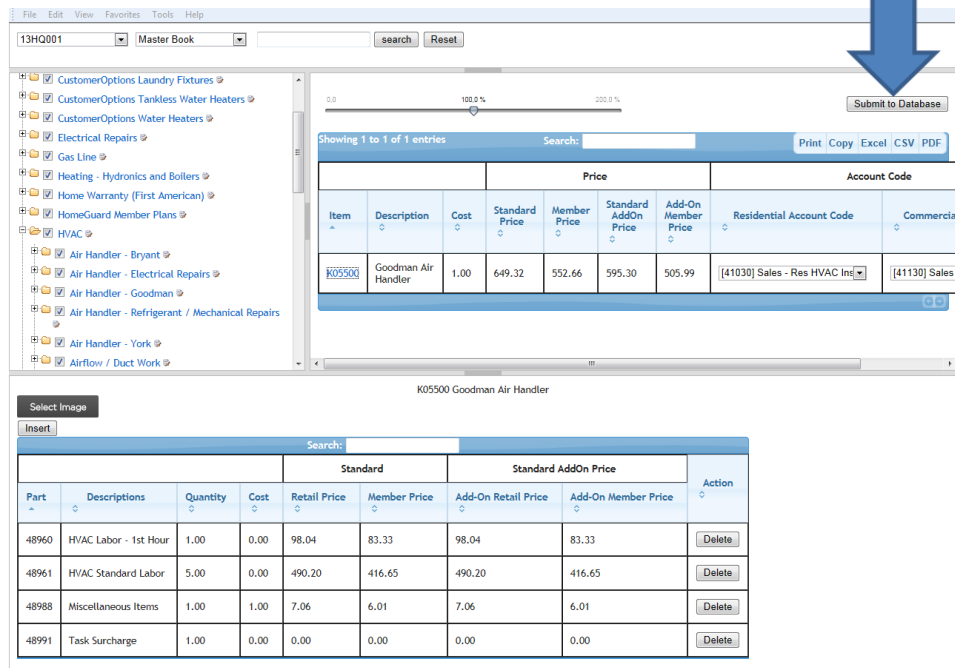
Part	Descriptions	Quantity	Cost	Retail Price	Member Price	Add-On
48960	HVAC Labor - 1st Hour	1.00	0.00	98.04	83.33	98.04
48961	HVAC Standard Labor	5.00	0.00	490.20	416.65	490.20
48988	Miscellaneous Items	1.00	1.00	7.06	6.01	7.06
48991	Task Surcharge	1.00	0.00	0.00	0.00	0.00

Fill out the rest of the form with Quantity, Cost, and Prices. Click the Save button. If you decide you would not like to add the part, click the Cancel button.

The screenshot shows the 'Insert Part' dialog box with the 'Save' and 'Cancel' buttons highlighted. The dialog lists the part 'Gdman Air Handler, 800CFM 2T' with fields for Quantity, Cost, Retail Price, Member Price, Add-On Retail Price, and Add-On Member Price.

Part	Descriptions	Quantity	Cost	Retail Price	Member Price	Add-On Retail Price	Add-On Member Price
48960	HVAC Labor - 1st Hour	1.00	0.00	98.04	83.33	98.04	83.33
48961	HVAC Standard Labor	5.00	0.00	490.20	416.65	490.20	416.65
48988	Miscellaneous Items	1.00	1.00	7.06	6.01	7.06	6.01
48991	Task Surcharge	1.00	0.00	0.00	0.00	0.00	0.00

Click the Submit to Database button to save the changes.



The screenshot shows a software interface for managing a price book. On the left is a tree view of categories like 'CustomerOptions Laundry Fixtures', 'CustomerOptions Tankless Water Heaters', etc. The main area displays a table for 'K05500 Goodman Air Handler' with columns for Cost, Standard Price, Member Price, Standard AddOn Price, and Add-On Member Price. Below this is a detailed view of the item, showing a table with columns for Part, Descriptions, Quantity, Cost, Standard Retail Price, Member Price, Standard AddOn Retail Price, Add-On Member Price, and Action. A 'Submit to Database' button is located in the top right corner of the main area, highlighted by a large blue arrow.

Item	Description	Cost	Standard Price	Member Price	Standard AddOn Price	Add-On Member Price	Residential Account Code	Commercial Account Code
K05500	Goodman Air Handler	1.00	649.32	552.66	595.30	505.99	[41030] Sales - Res HVAC Inc	[41130] Sales

Part	Descriptions	Quantity	Cost	Standard Retail Price	Member Price	Standard AddOn Retail Price	Add-On Member Price	Action
48960	HVAC Labor - 1st Hour	1.00	0.00	98.04	83.33	98.04	83.33	Delete
48961	HVAC Standard Labor	5.00	0.00	490.20	416.65	490.20	416.65	Delete
48988	Miscellaneous Items	1.00	1.00	7.06	6.01	7.06	6.01	Delete
48991	Task Surcharge	1.00	0.00	0.00	0.00	0.00	0.00	Delete

## 6.3 Adding Images to a Task

Click on the Select Image button.

The screenshot shows the software interface with a list of tasks on the left. A blue arrow points to the 'Select Image' button located below the task list. The main window displays a table for 'K05500 Goodman Air Handler' with columns for Item, Description, Cost, Standard Price, Member Price, Standard AddOn Price, Add-On Member Price, Residential Account Code, and Commercial Account Code. The table shows one entry for 'K05500 Goodman Air Handler' with a cost of 1.00 and a standard price of 649.32.

Item	Description	Cost	Standard Price	Member Price	Standard AddOn Price	Add-On Member Price	Residential Account Code	Commercial Account Code
K05500	Goodman Air Handler	1.00	649.32	552.66	595.30	505.99	[41030] Sales - Res HVAC Inc	[41130] Sales

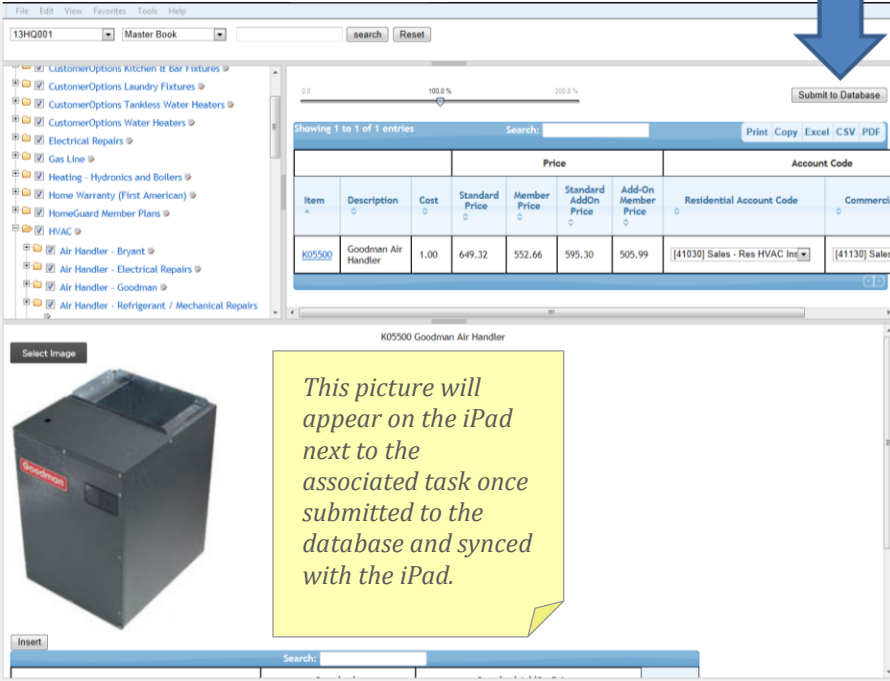
Select the picture from your local computer drive.

The screenshot shows the software interface with a file selection dialog box open. The dialog box is titled 'Select Files to upload by: c:\greenbox.com' and shows a list of files in the 'Pictures' folder. The file 'Goodman Air Handler' is selected. The 'File name' field shows 'Goodman Air Handler' and the 'File of type' is set to 'Image Files'. The 'Open' button is highlighted. The main window displays the same table as the previous screenshot, but the 'Standard AddOn Price' and 'Add-On Member Price' columns are now visible.

Part	Descriptions	Quantity	Cost	Retail Price	Member Price	Add-On Retail Price	Add-On Member Price	Action
48960	HVAC Labor - 1st Hour	1.00	0.00	98.04	83.33	98.04	83.33	Delete
48961	HVAC Standard Labor	5.00	0.00	490.20	416.65	490.20	416.65	Delete
48988	Miscellaneous Items	1.00	1.00	7.06	6.01	7.06	6.01	Delete
48991	Task Surcharge	1.00	0.00	0.00	0.00	0.00	0.00	Delete



Click the Submit to Database button to save the picture.



The screenshot displays a software application window with a menu bar (File, Edit, View, Favorites, Tools, Help) and a search bar. A blue arrow points to the "Submit to Database" button located in the top right corner of the main content area. Below the search bar, there is a table showing pricing information for a selected item, "K05500 Goodman Air Handler". The table includes columns for Item, Description, Cost, Standard Price, Member Price, Standard Add-On Price, Add-On Member Price, Residential Account Code, and Commercial Account Code. The table shows one entry with a cost of 1.00 and a standard price of 649.32. Below the table, there is a section for selecting an image for the "K05500 Goodman Air Handler". A yellow callout box states: "This picture will appear on the iPad next to the associated task once submitted to the database and synced with the iPad." The image shows a Goodman air handler unit.

Item	Description	Cost	Standard Price	Member Price	Standard Add-On Price	Add-On Member Price	Residential Account Code	Commercial Account Code
K05500	Goodman Air Handler	1.00	649.32	552.66	595.30	505.99	[41030] Sales - Res HVAC Int	[41130] Sales