Volume

CONNECTUSPro

Online Price Book Manual

CONNECTUS TECHNOLOGY

ConnectusPro Online Price Book Manual

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Online Price Book Manual

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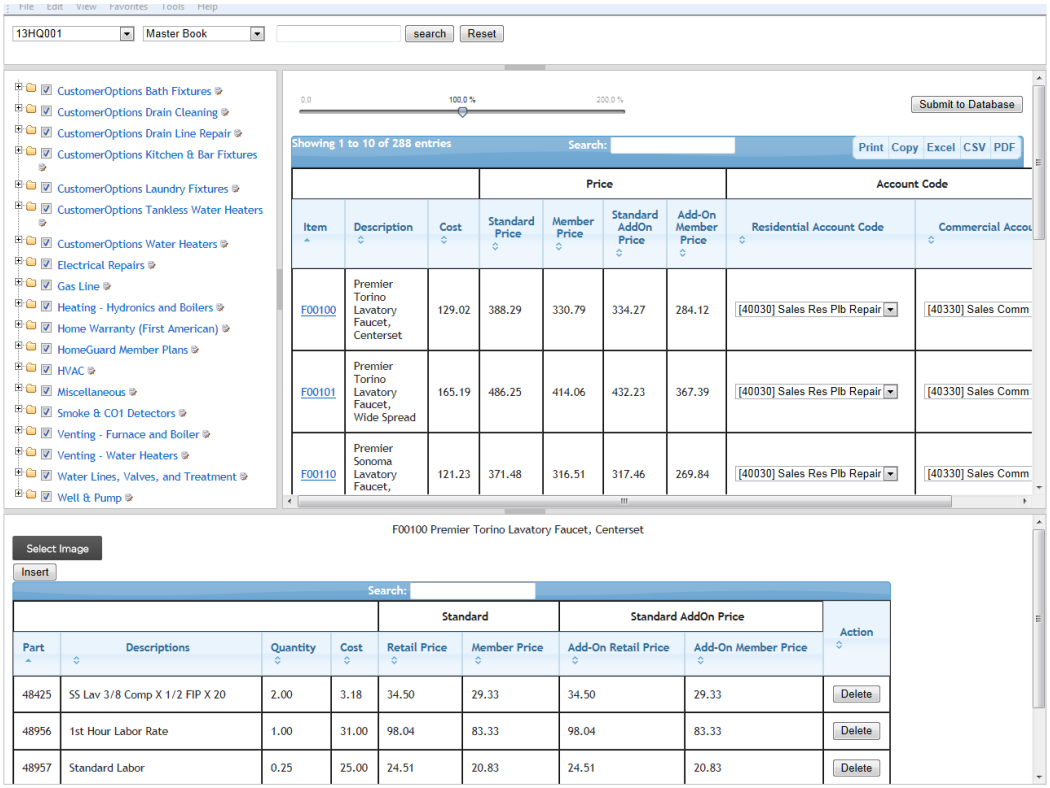
Chapter

1

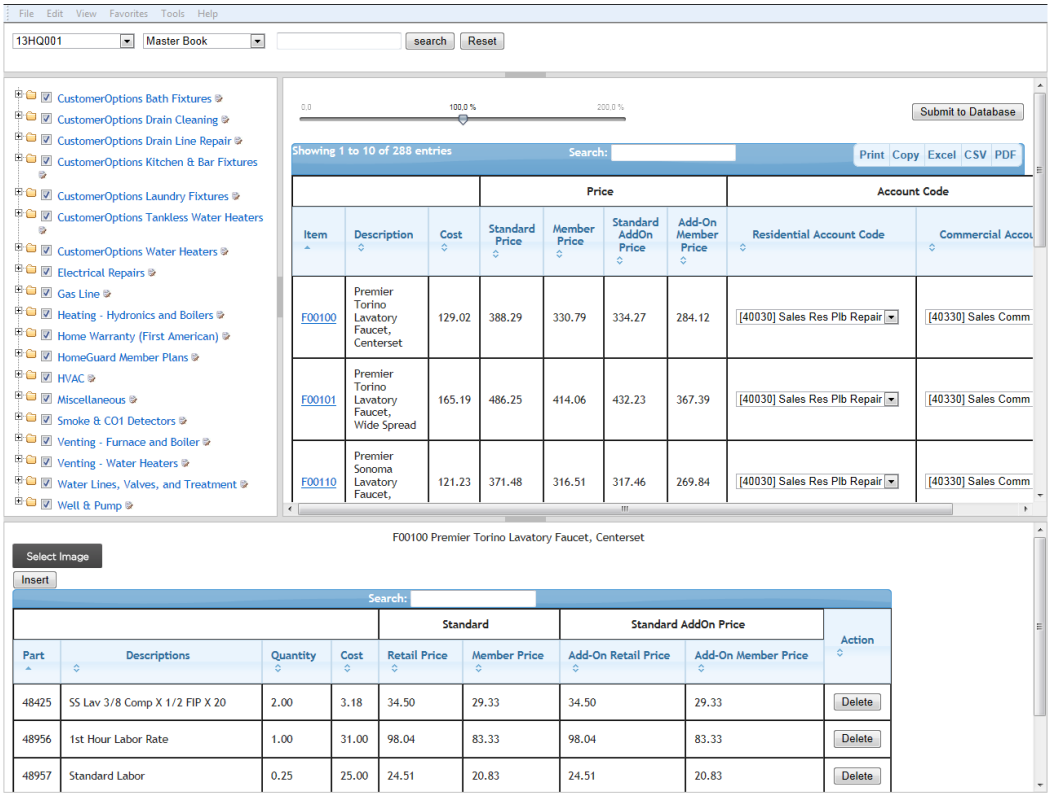
General Information

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.



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.

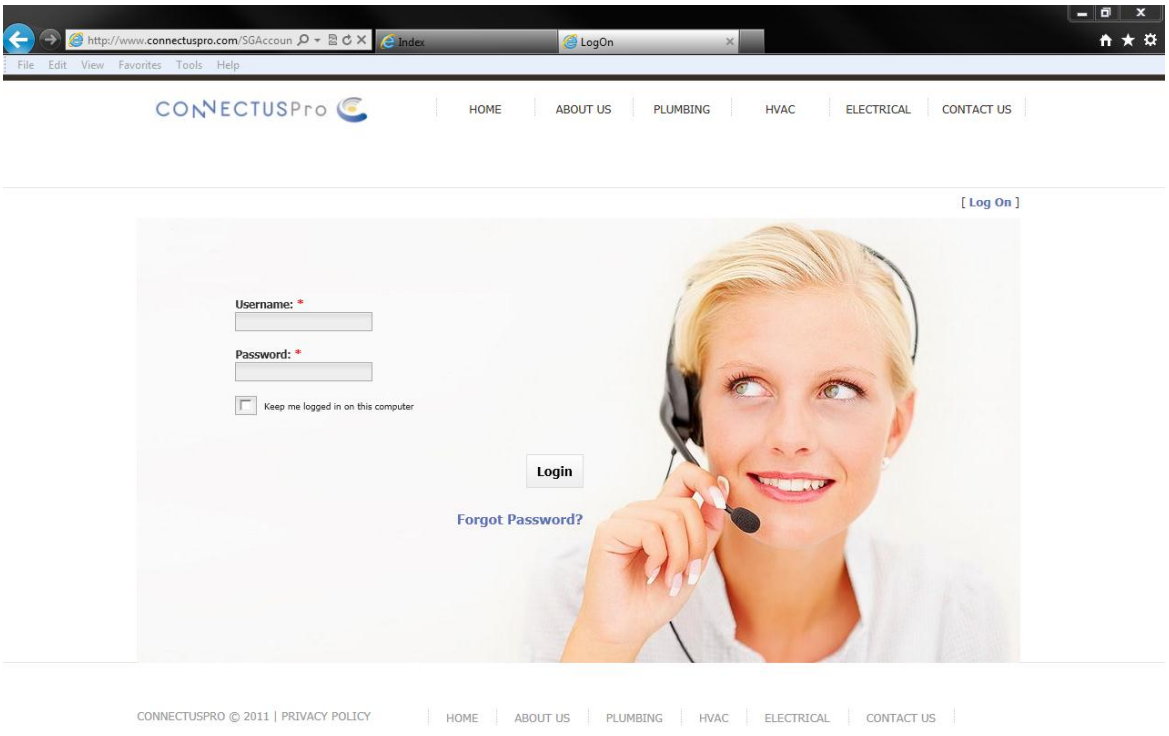


Chapter

2

Logging On

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



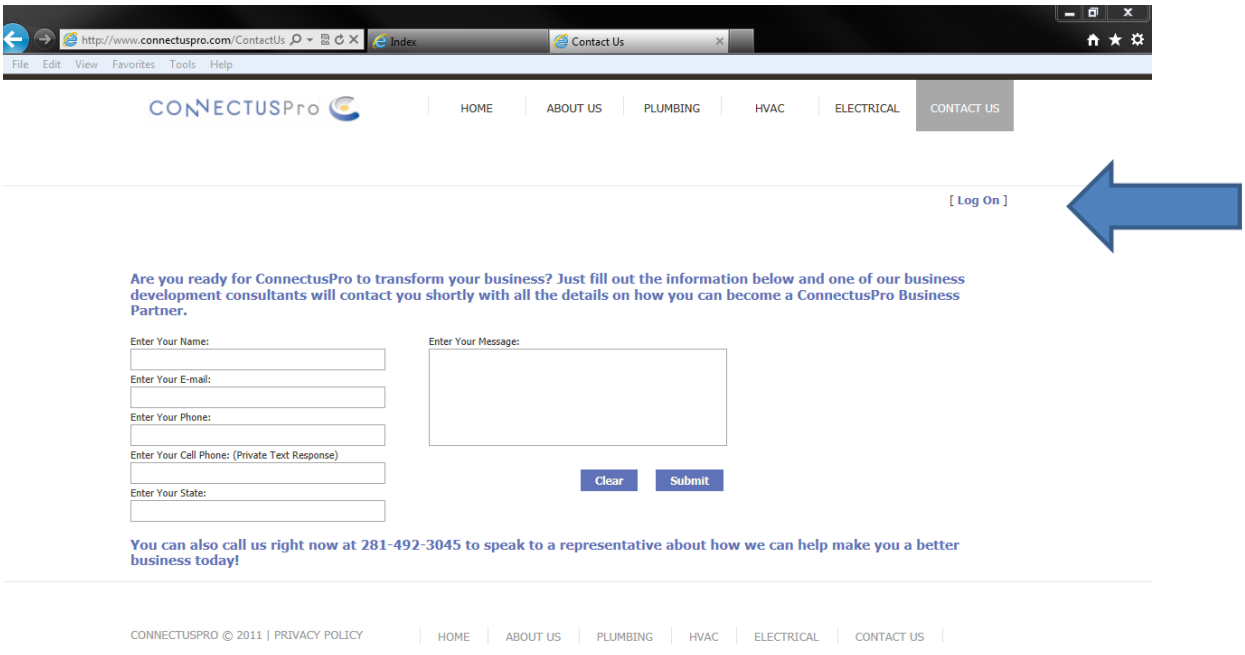
2.0 Logging On

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

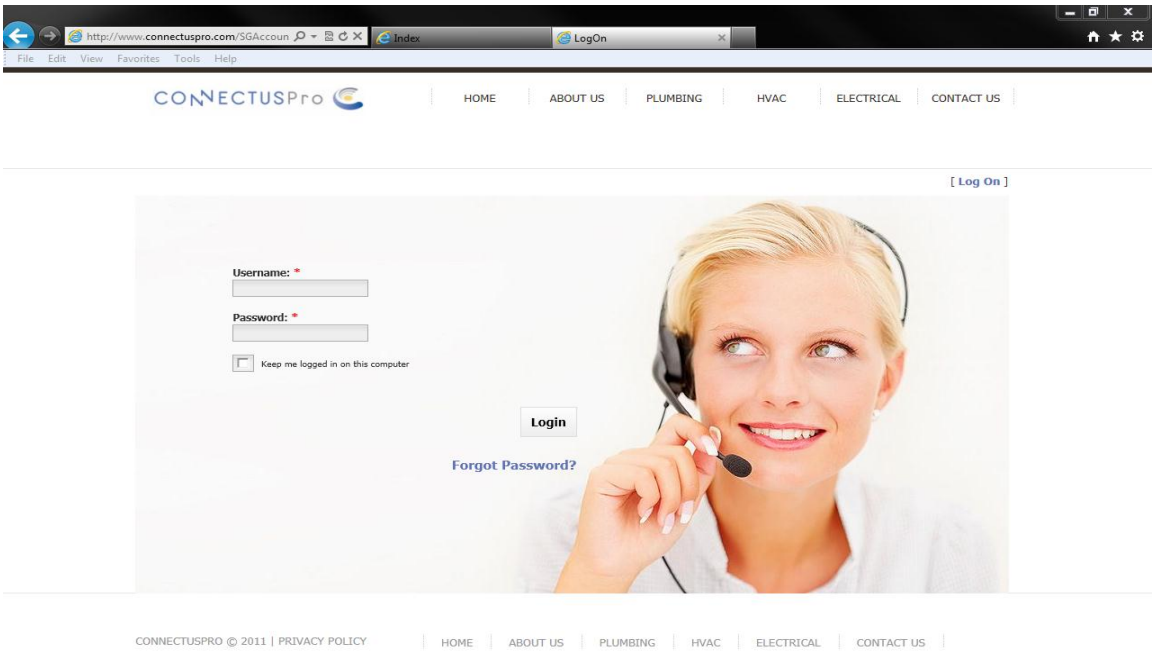
2.1 Owner's Portal Login

1. Go to www.connectuspro.com 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.



3. Enter your Username and Password and click Login



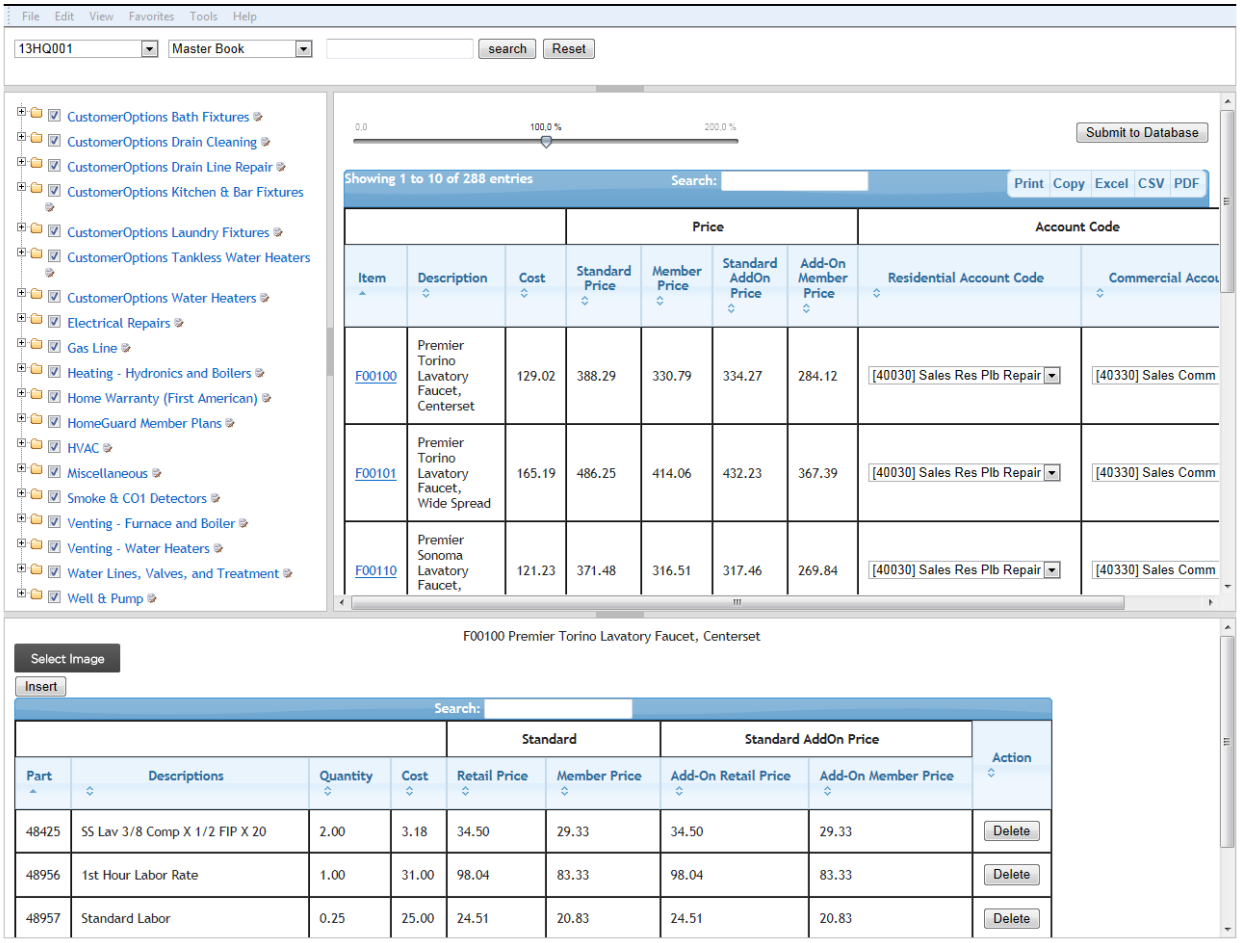
4. On the Owner's Portal Home Page, you can access the price book in two ways:
    a. Click "My Pricebook" on the left navigation pane, or
    b. Click the "My Master Data" icon and then click the "My Pricebook" icon on the subsequent screen.

Chapter

3

Price Book Home Screen

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



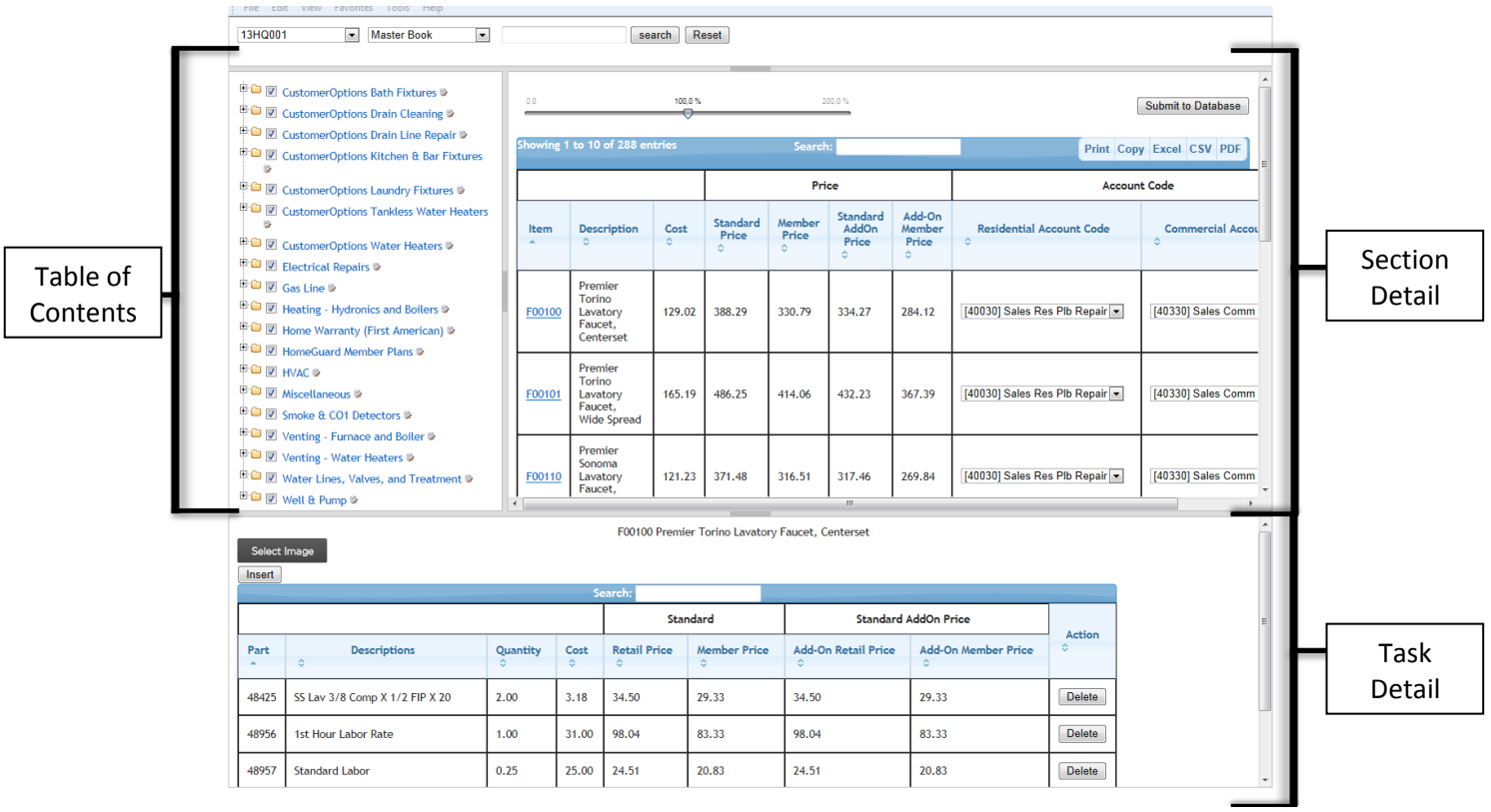
3.0 Price Book Home Screen

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.

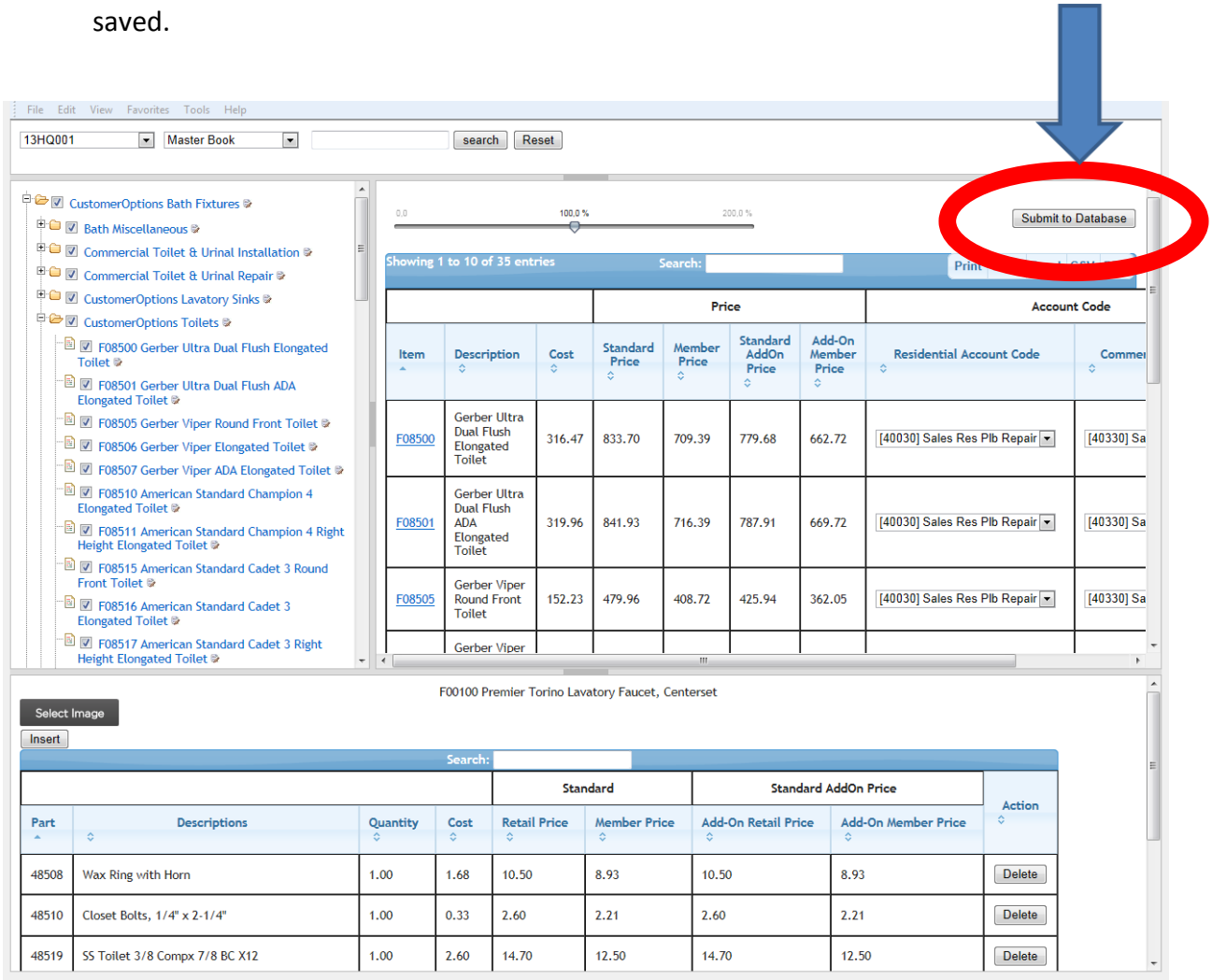
Section Detail: area located at top right of webpage; will provide you with detailed information on the section currently selected in the table of contents, including cost, price, and account code. In this section you will be able to manage the prices of certain tasks.

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.



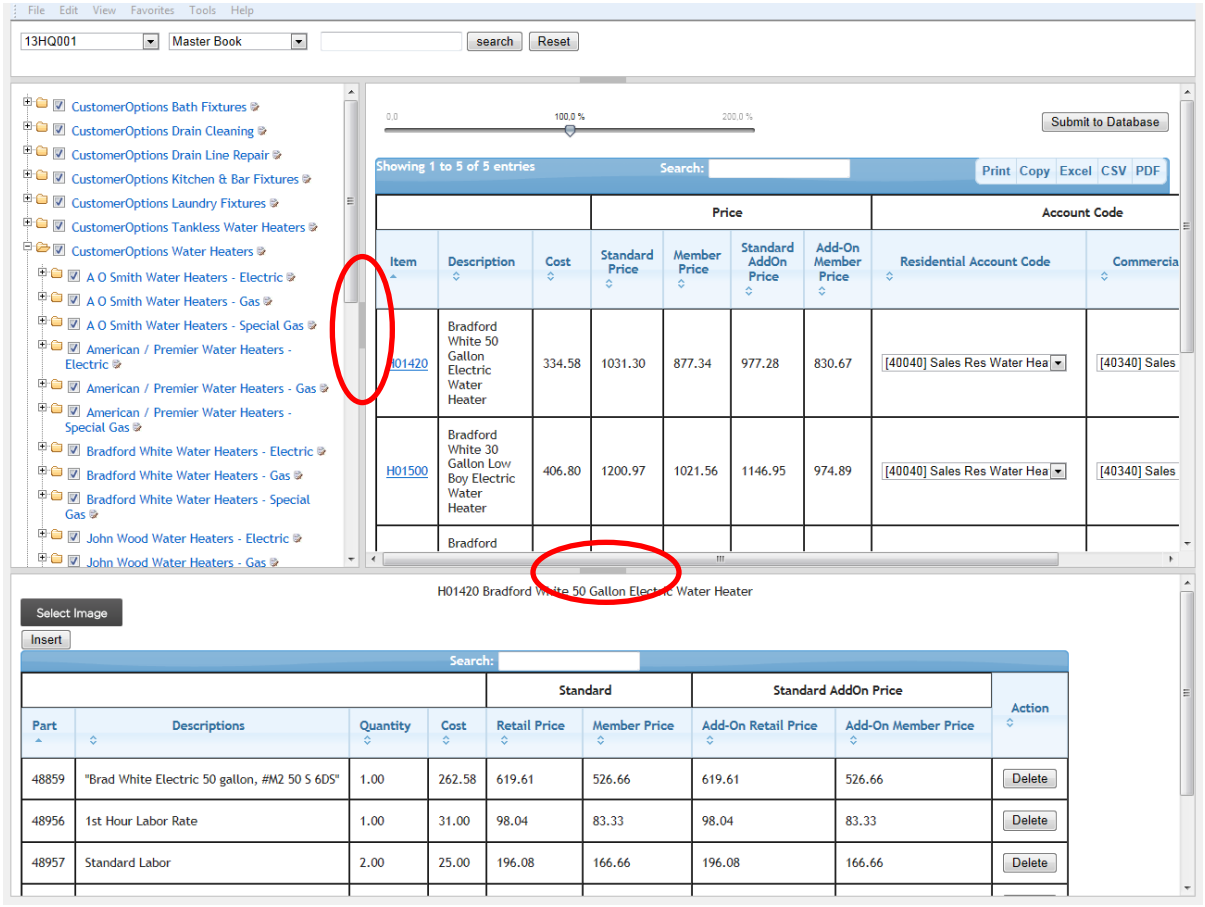
3.1 Saving Changes to Price Book

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.



3.2 Resizing the Home Screen Sections

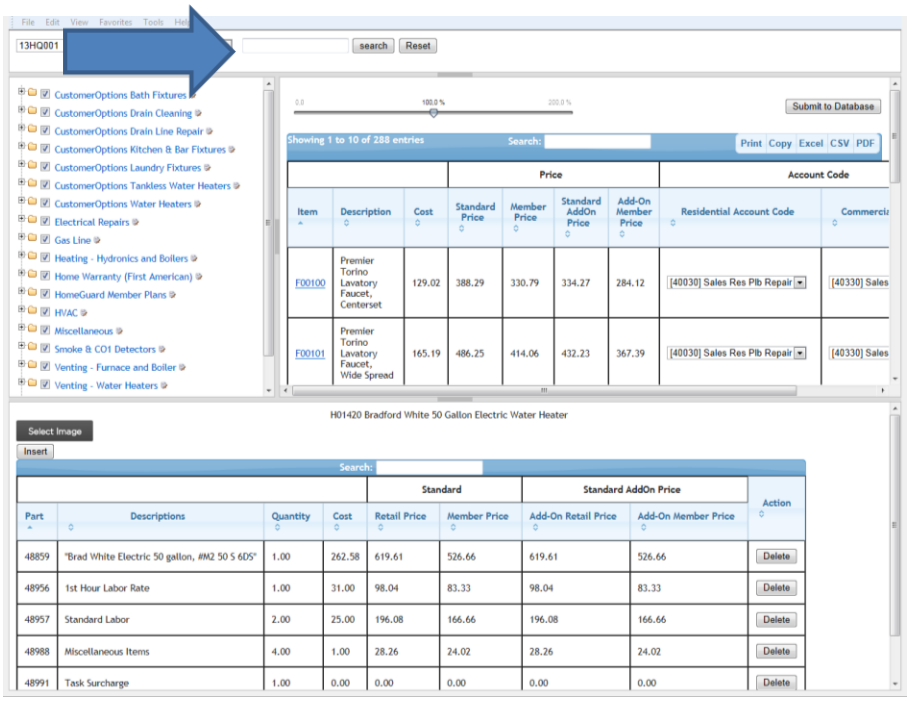
The home screen sections may be re-sized to expand each section to make it easier to read. Place your pointer over the gray areas in between the 3 sections (circled in red below). Click and drag the lines up, down, left, or right, depending on the area you would like to resize.



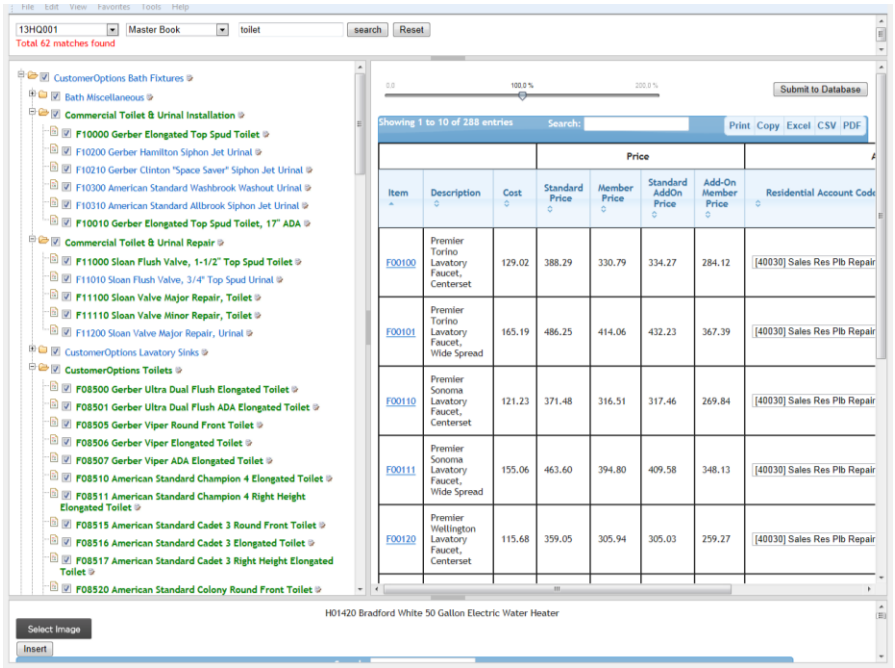
If you double click on the gray area, it will hide the section on the side or bottom of the webpage. Double click again to make the area appear.

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).



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

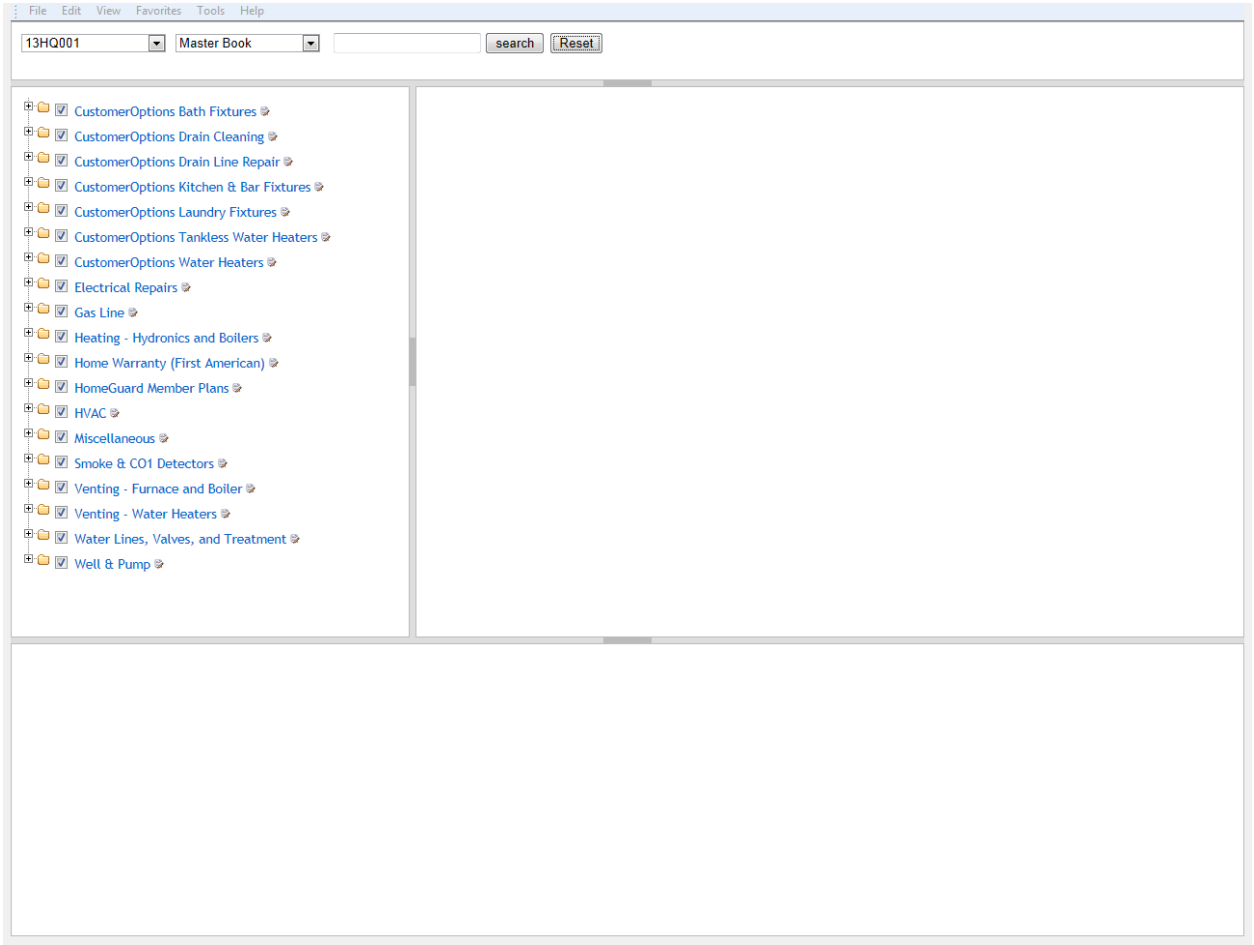


Chapter

4

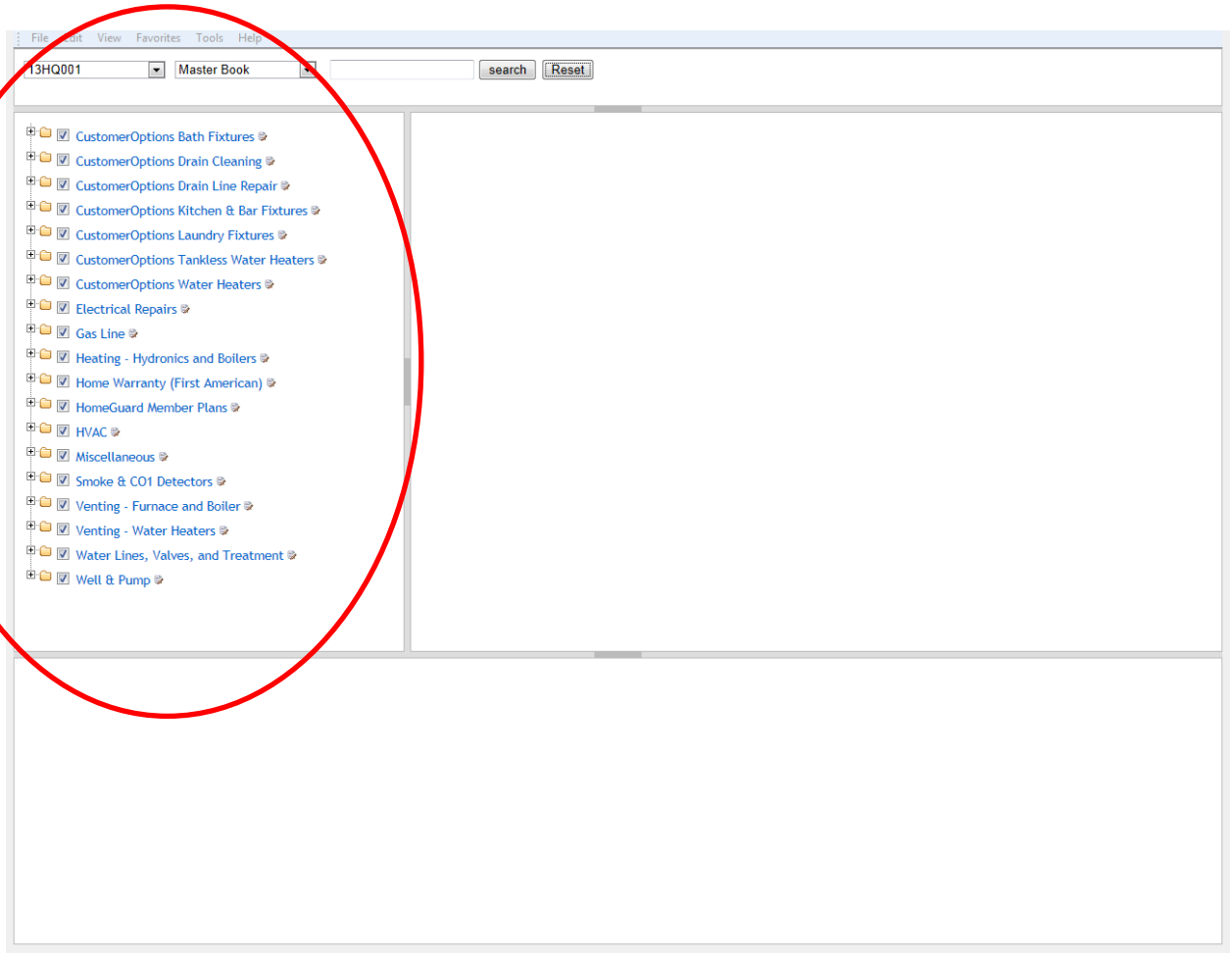
Table of Contents Area

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.



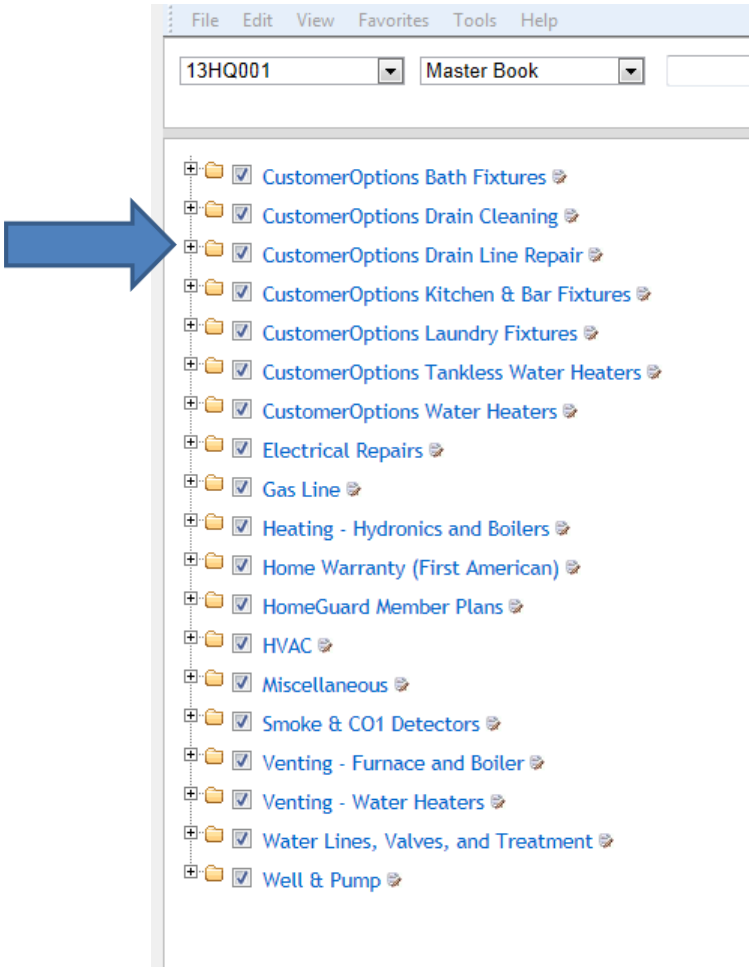
4.0 Table of Contents Area

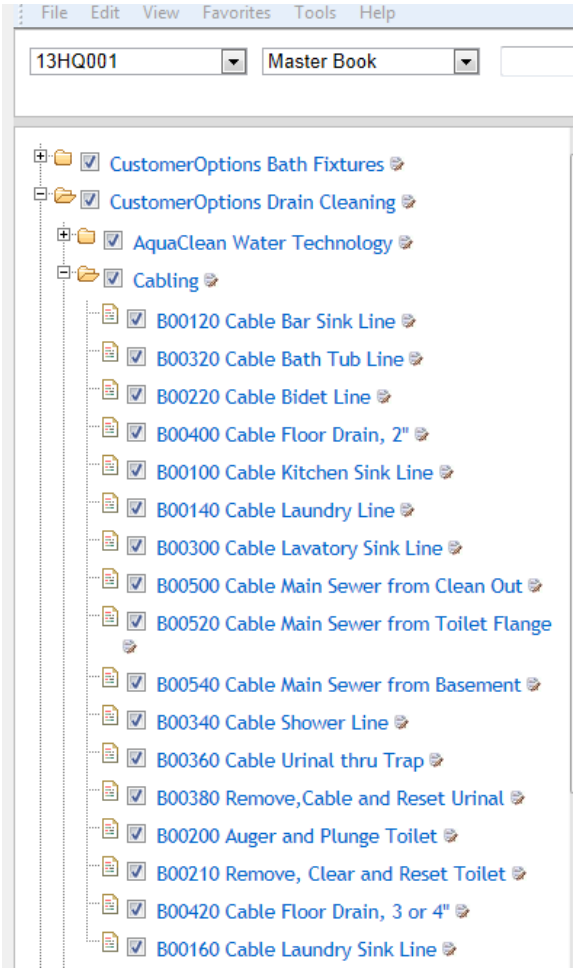
This is your Table of Contents.



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.



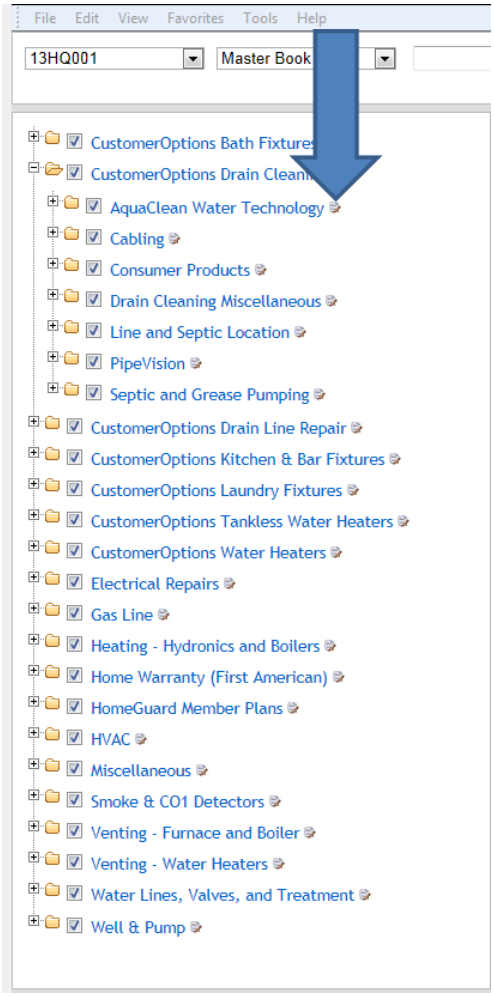


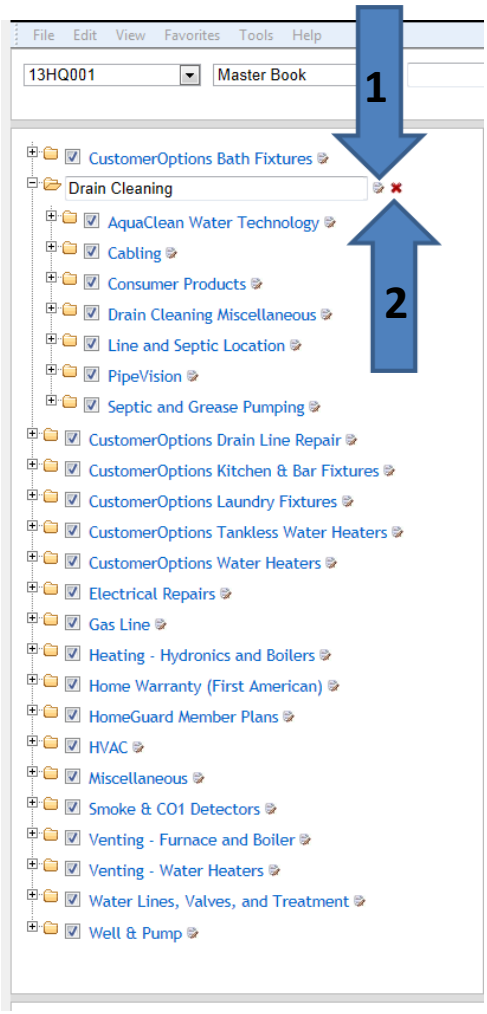
4.2 Changing the Display Name of Sections/Subsections/Tasks

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.

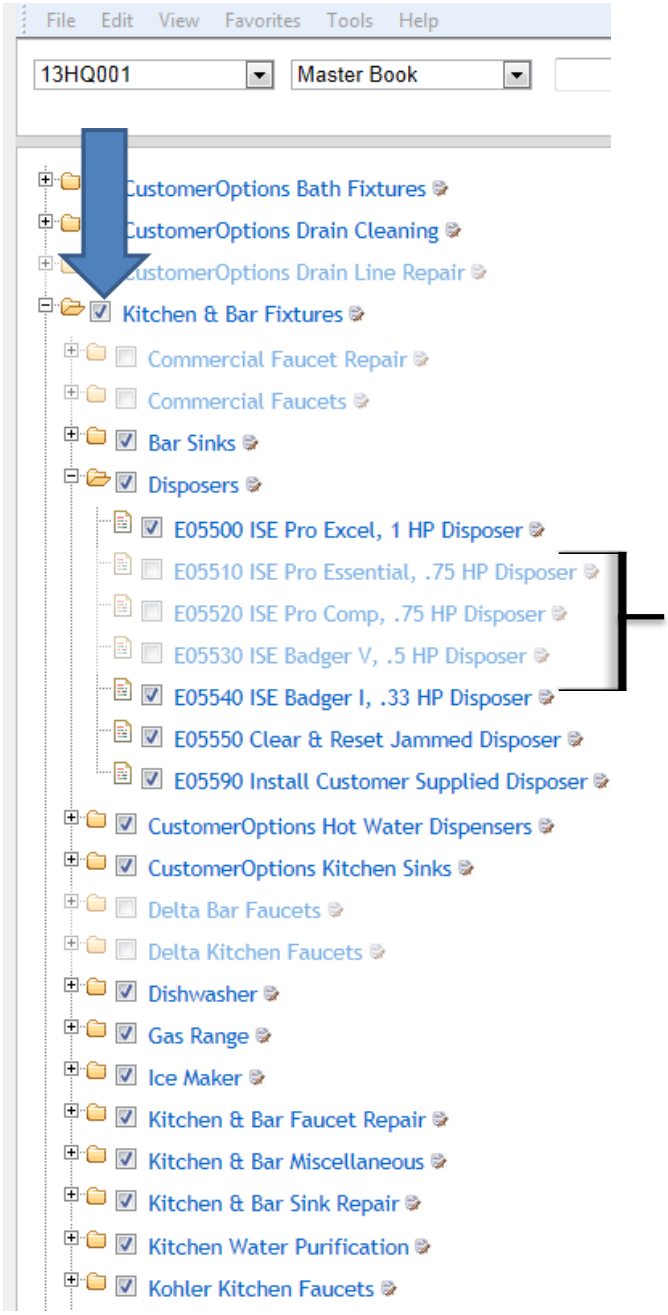
1. To save the new title, click the icon.
2. To cancel the new title, click on the red X.





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.



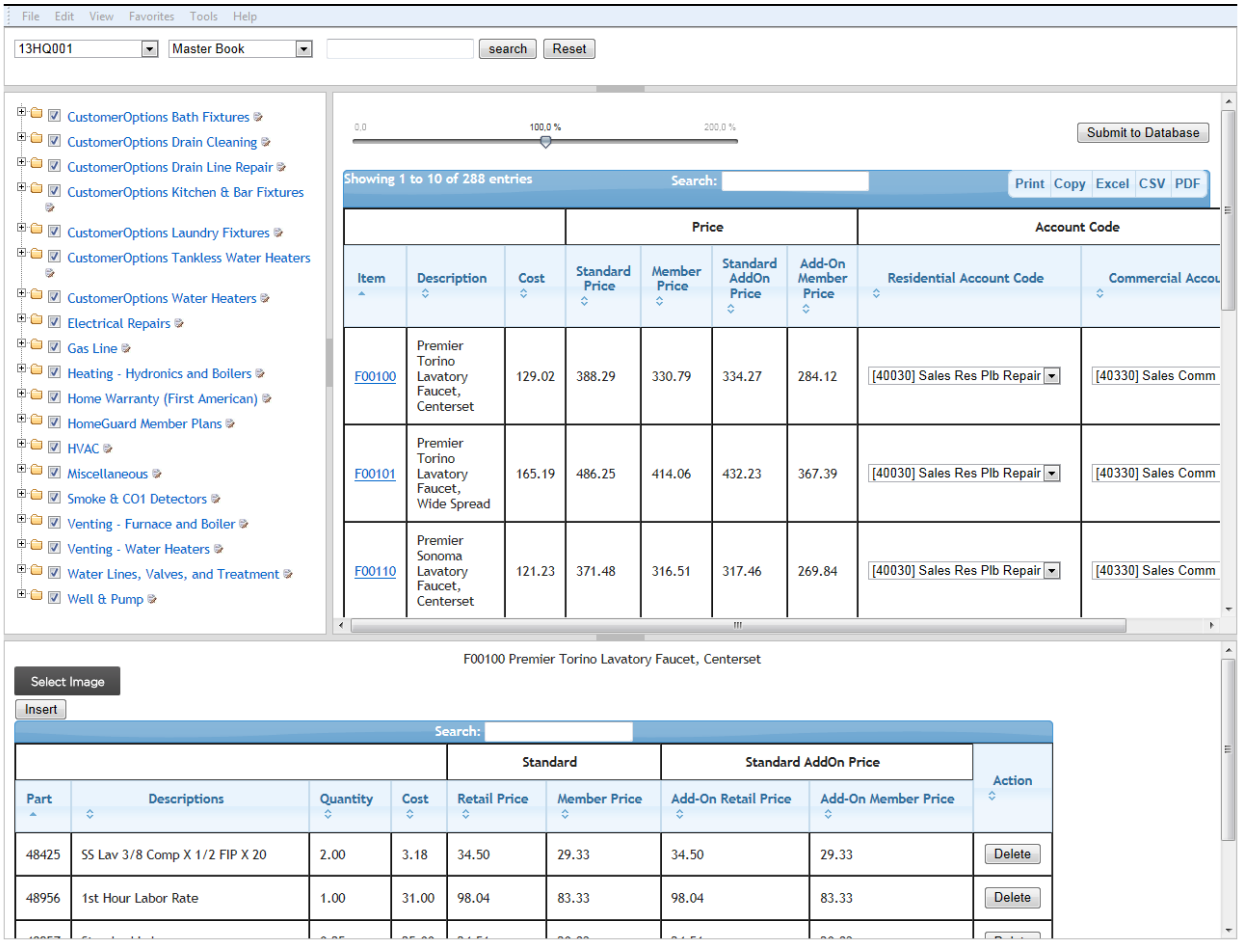
*These tasks are Inactive and will **not** show up on technician's iPad once the changes have been submitted and the iPad has been synced with the price book.*

Chapter

5

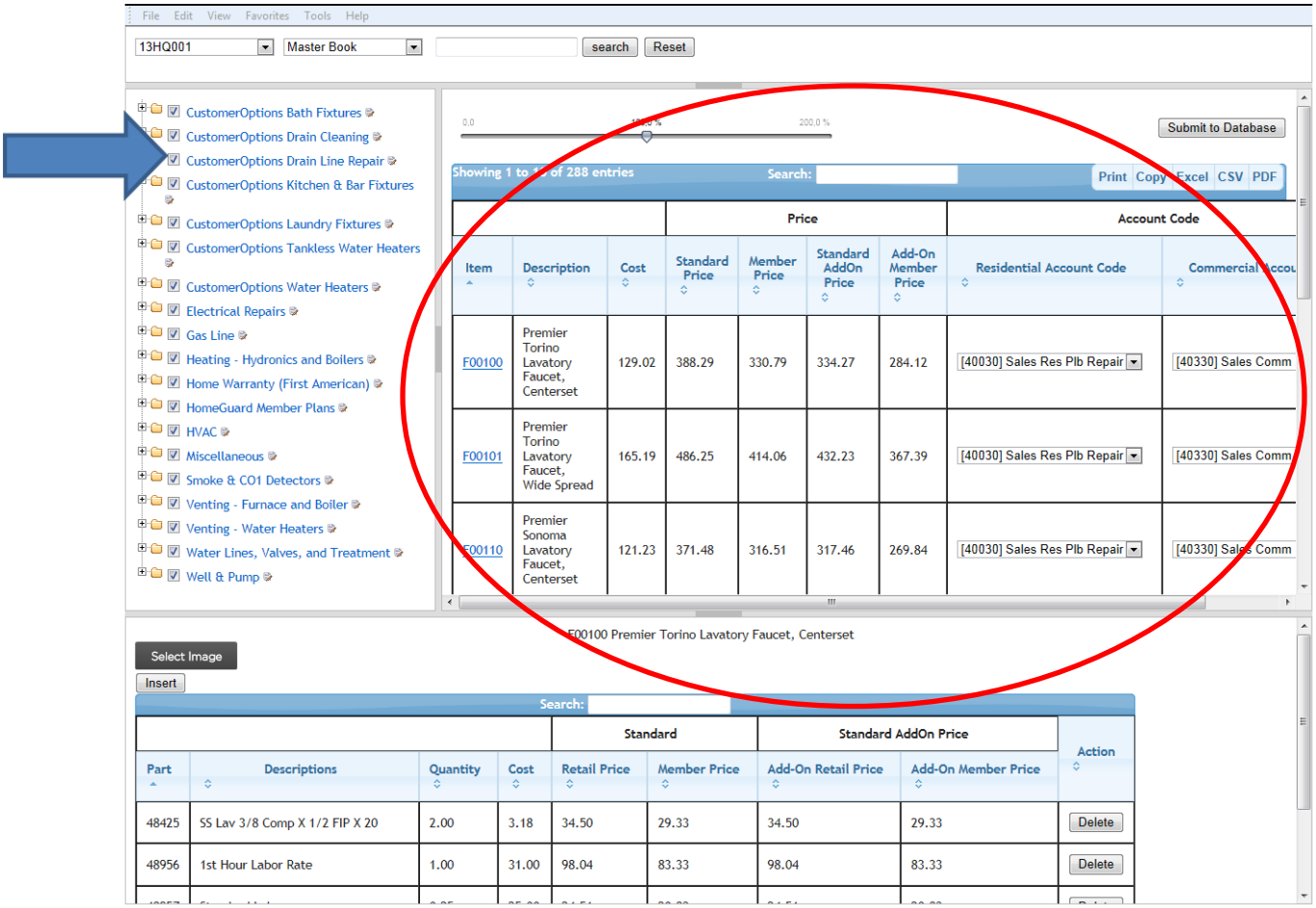
Section Detail Area

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.



5.0 Section Detail Area

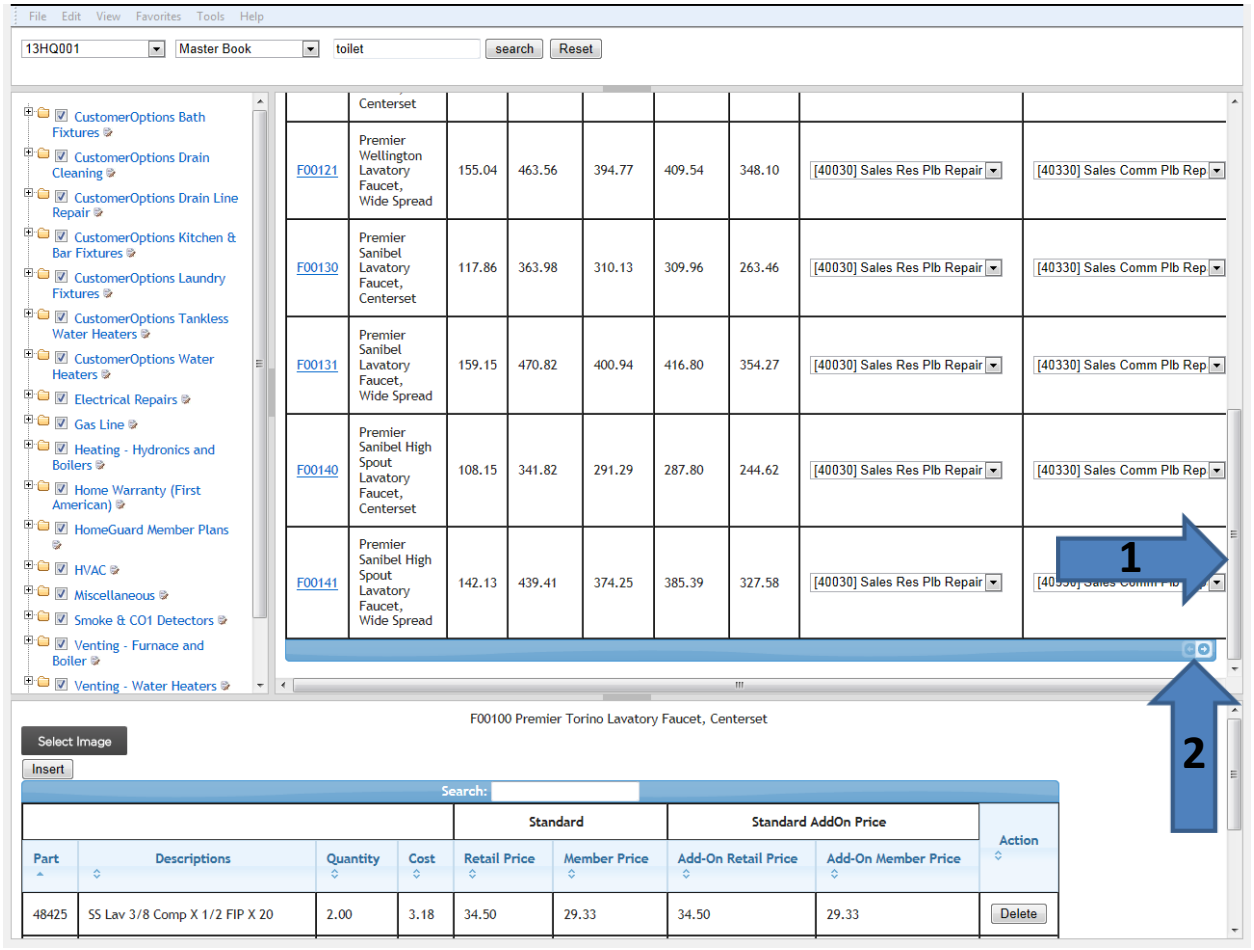
In order to display data in this area, click on the blue section or subsection in the Table of Contents area.



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.



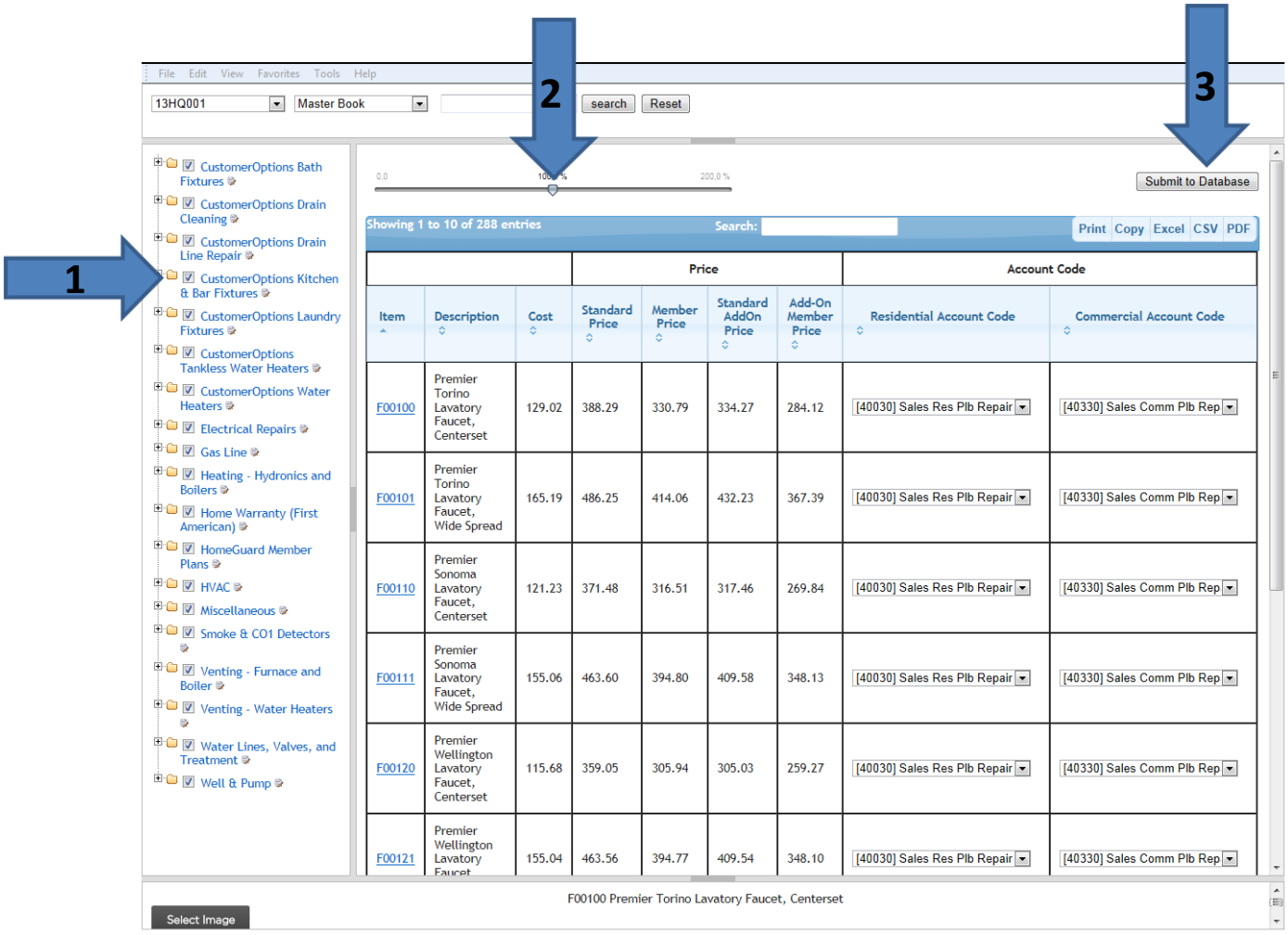
5.2 Updating Prices in Price Book

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:

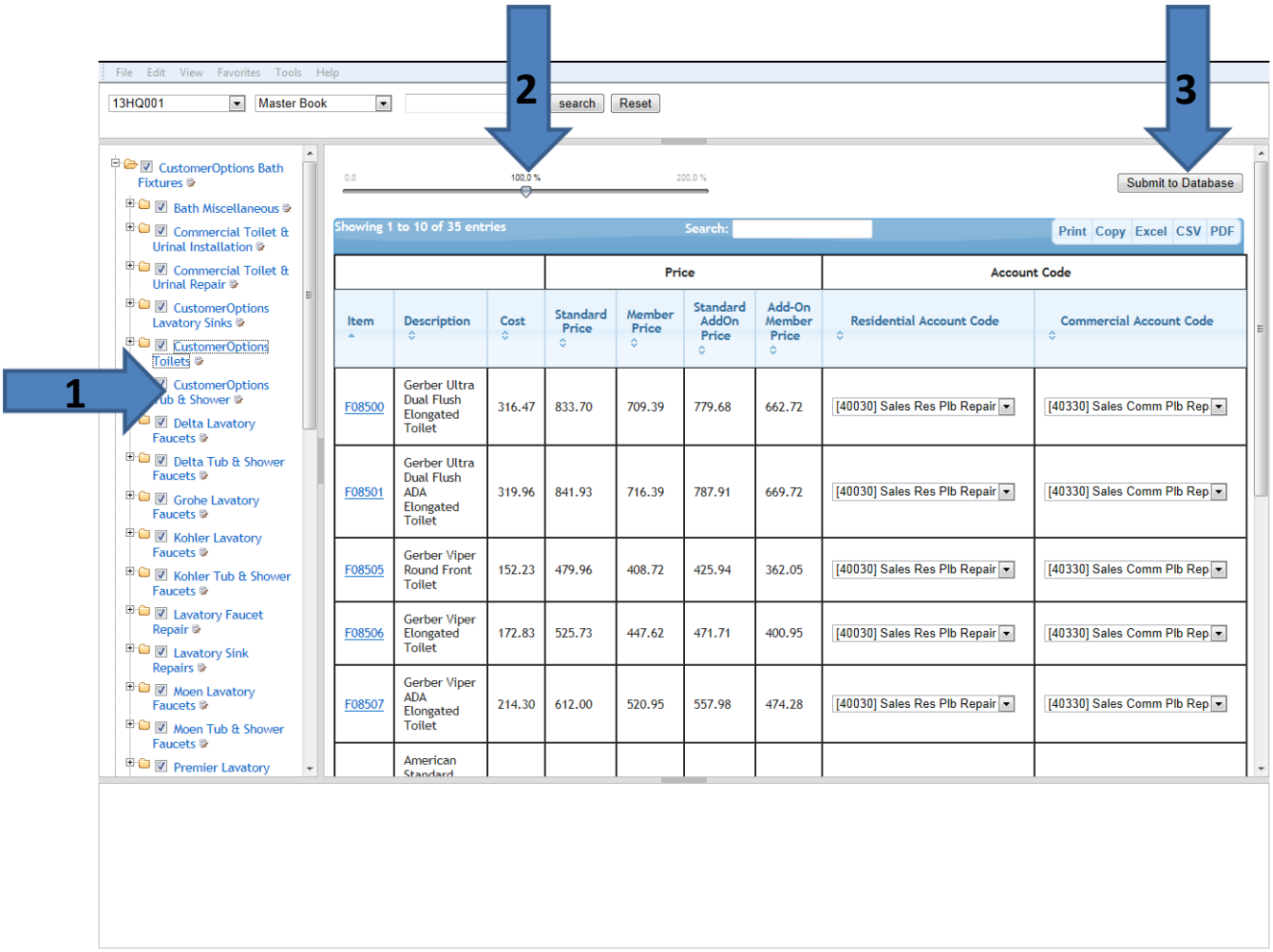
1. Select the section from the table of contents on the left side to display all tasks in that section.
2. Move the Price Slider and the price will go up or down respectively for the entire section chosen. Simply click on the marker and drag to the left to turn the prices down, or drag to the right to 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.



5.2.2 Updating Prices by Subsection

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

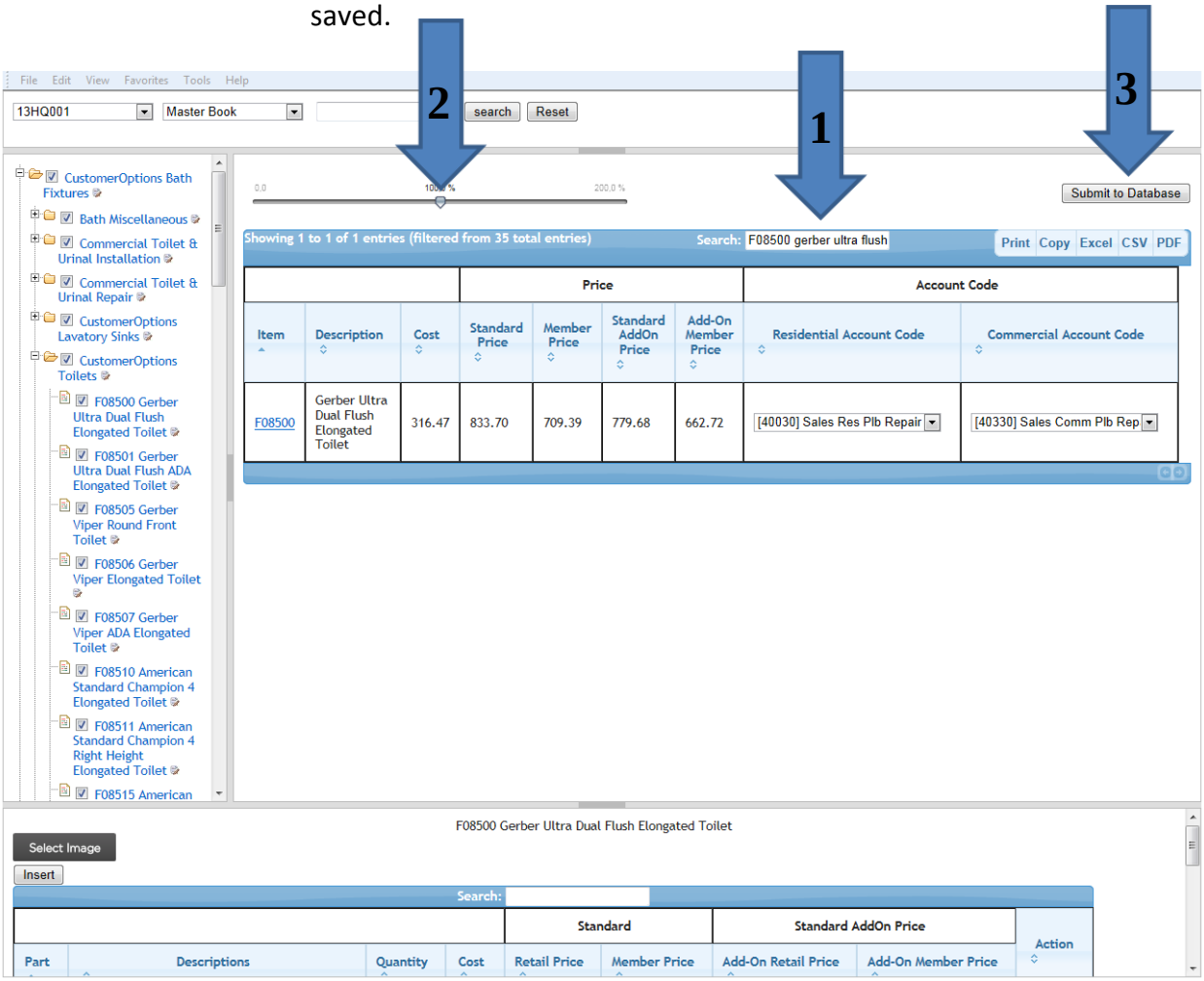
1. Select the subsection from the table of contents on the left side to display the tasks associated.
2. You will then use the Price Slider to increase or decrease the price of the associated subsection.
3. Press the Submit to Database Button in order to ensure the price changes get saved.



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.

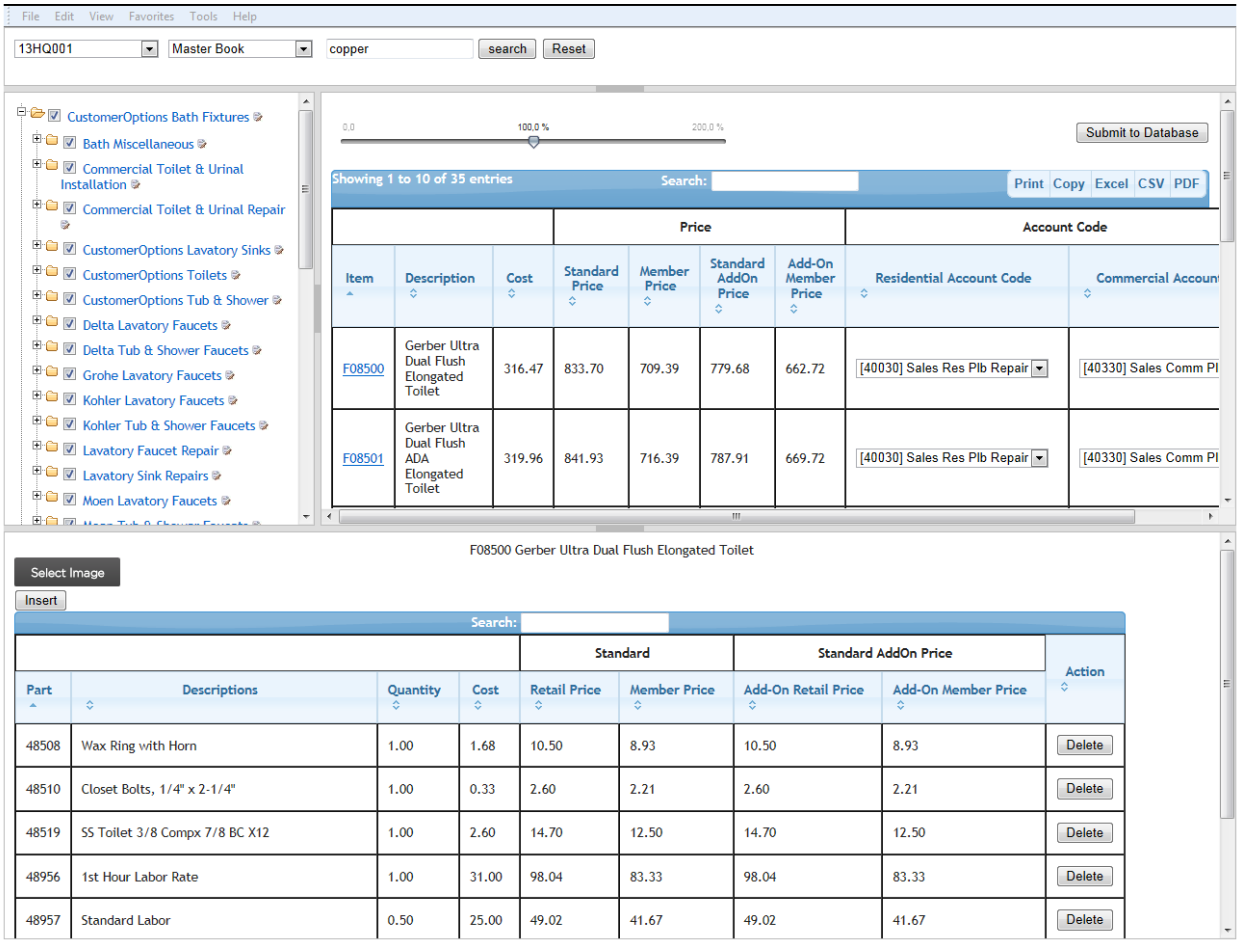


Chapter

6

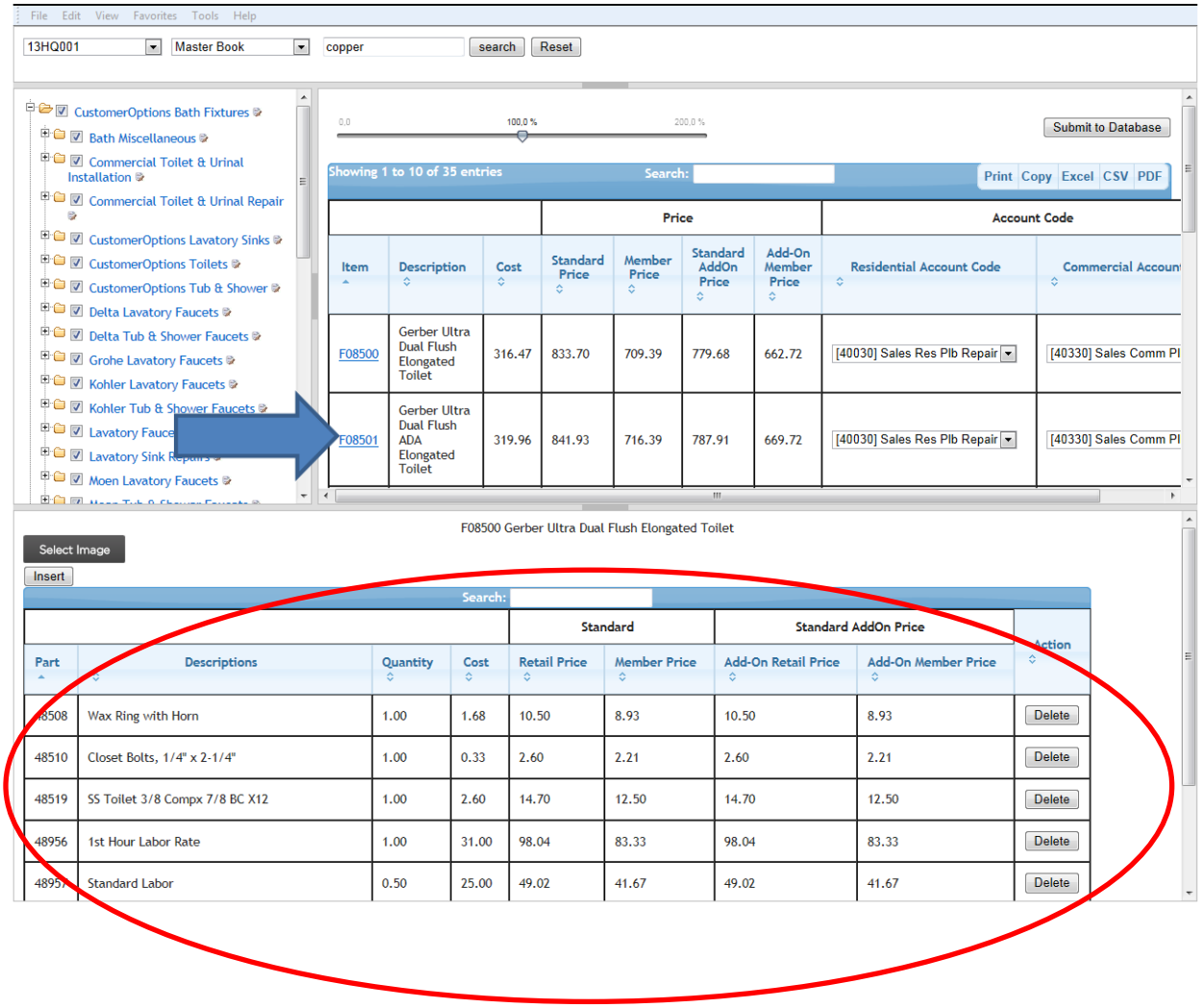
Task Detail Area

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.



6.0 Task Detail Area

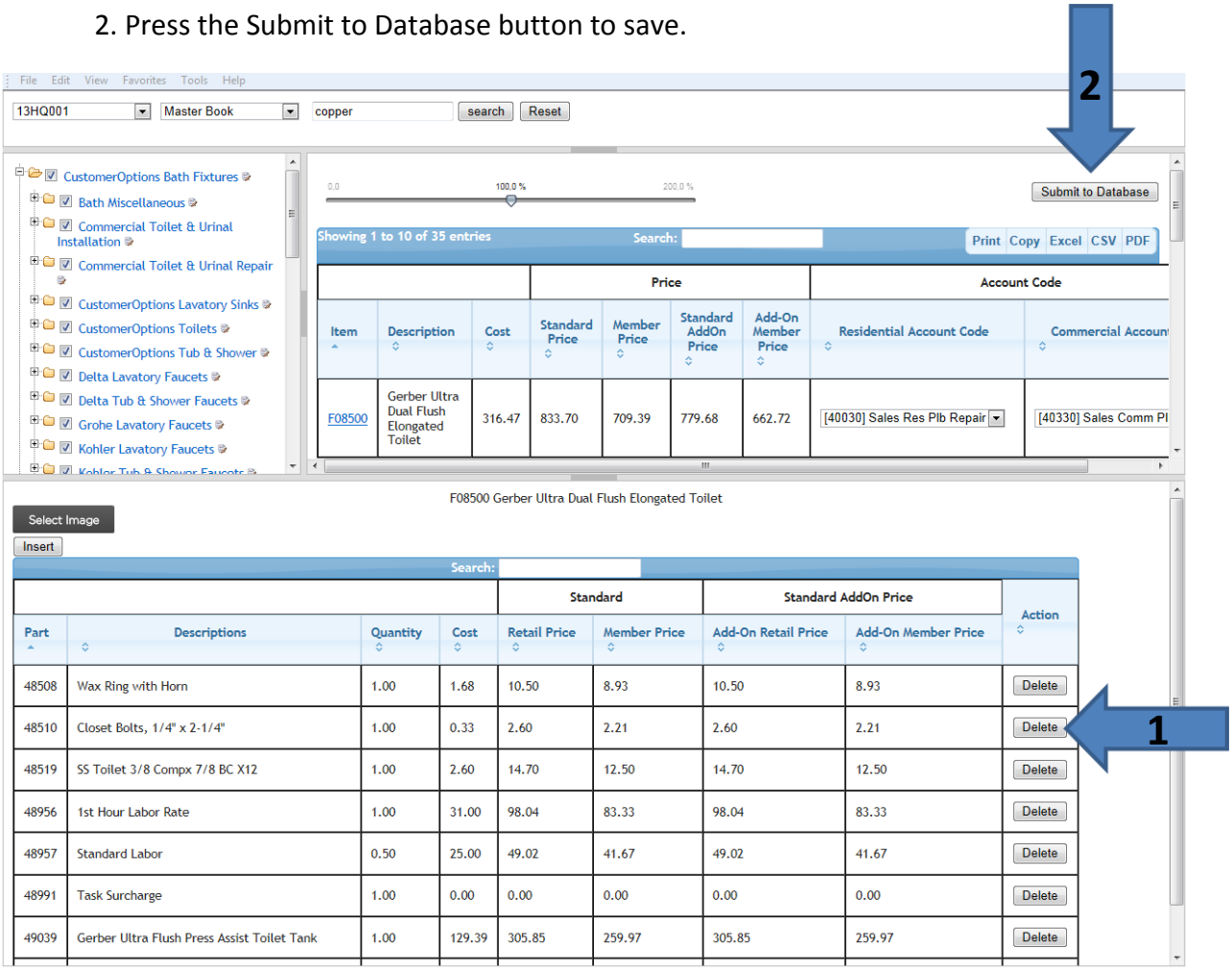
In order to display data in this area, click on the blue item # in the Section Detail area.



6.1 Deleting a Part from a Task

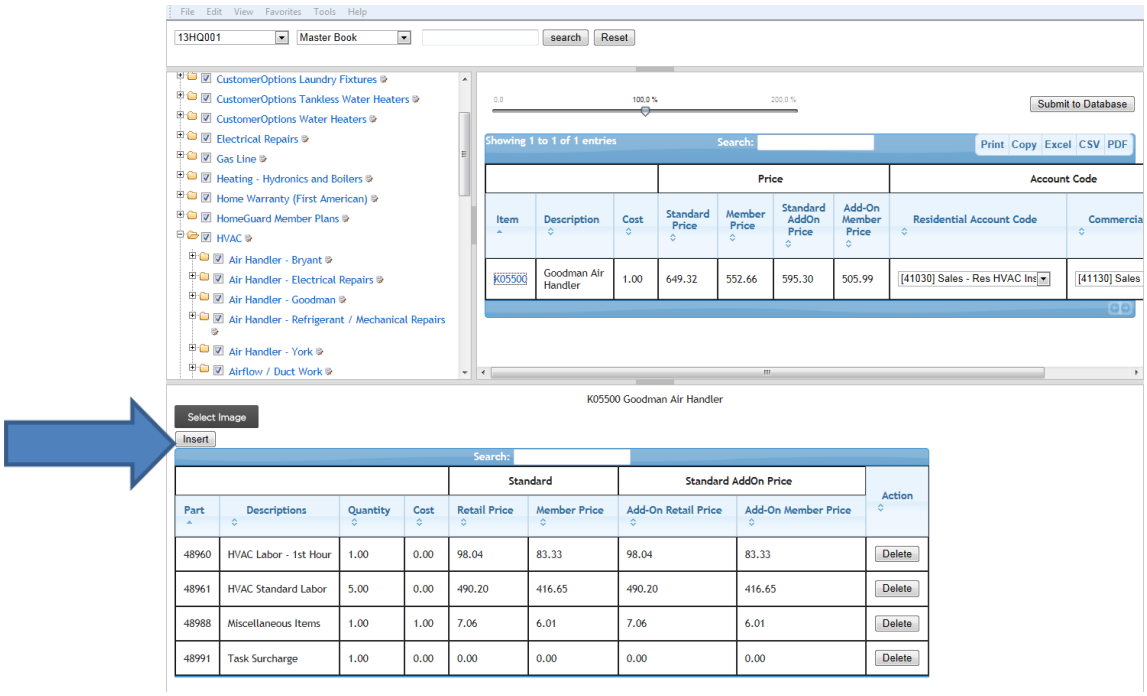
With the specific task displayed in the Task Detail area, do the following:

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.

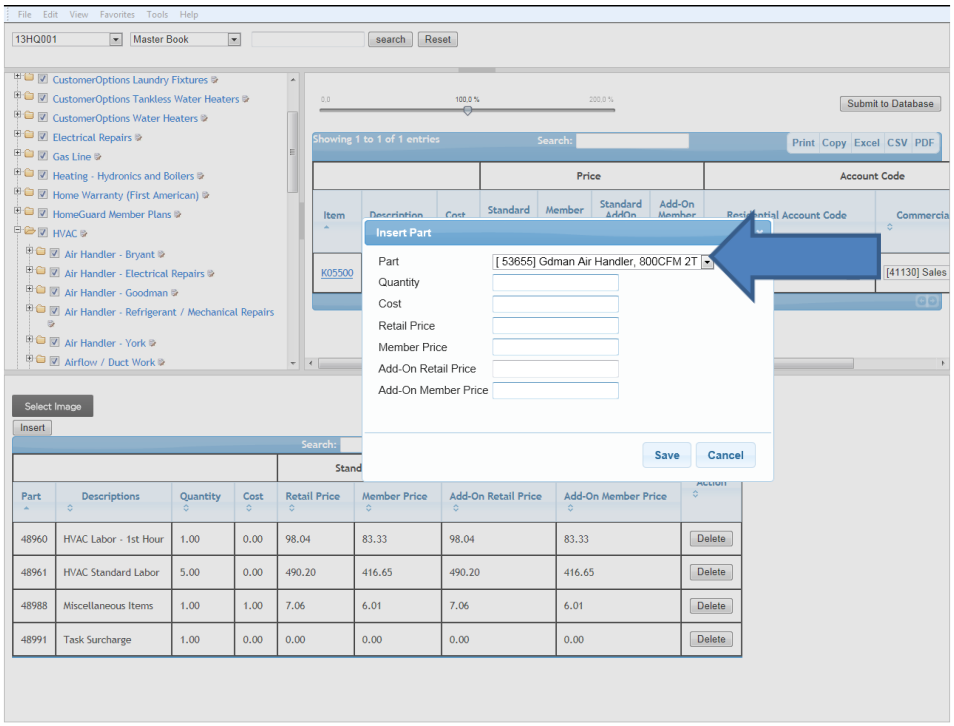


6.2 Adding a Part to a Task

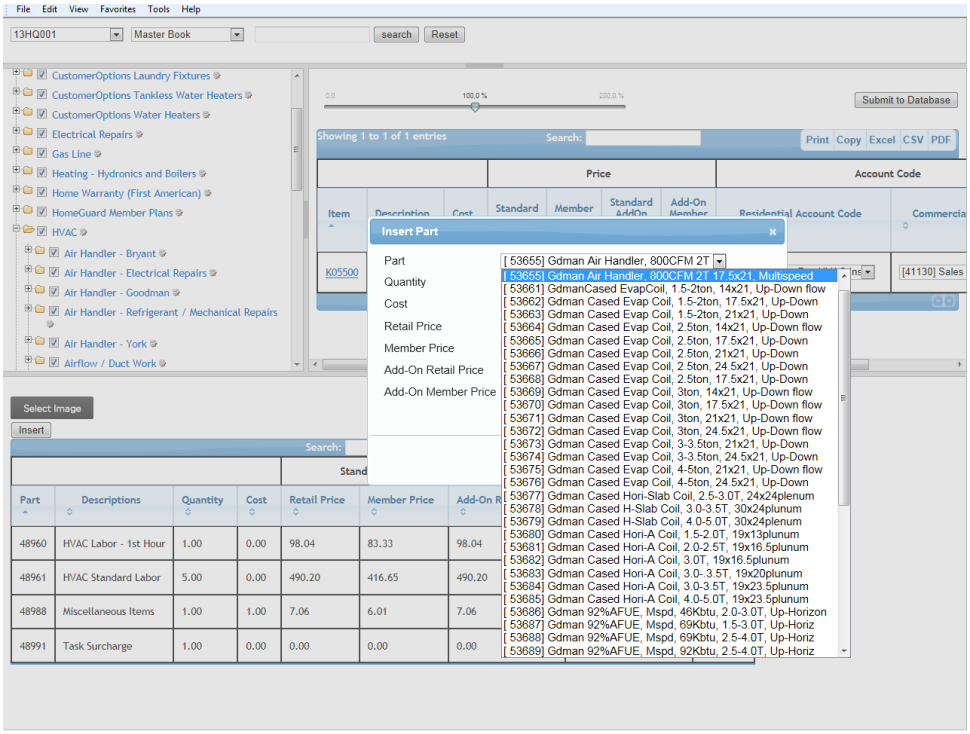
Click the “Insert” button



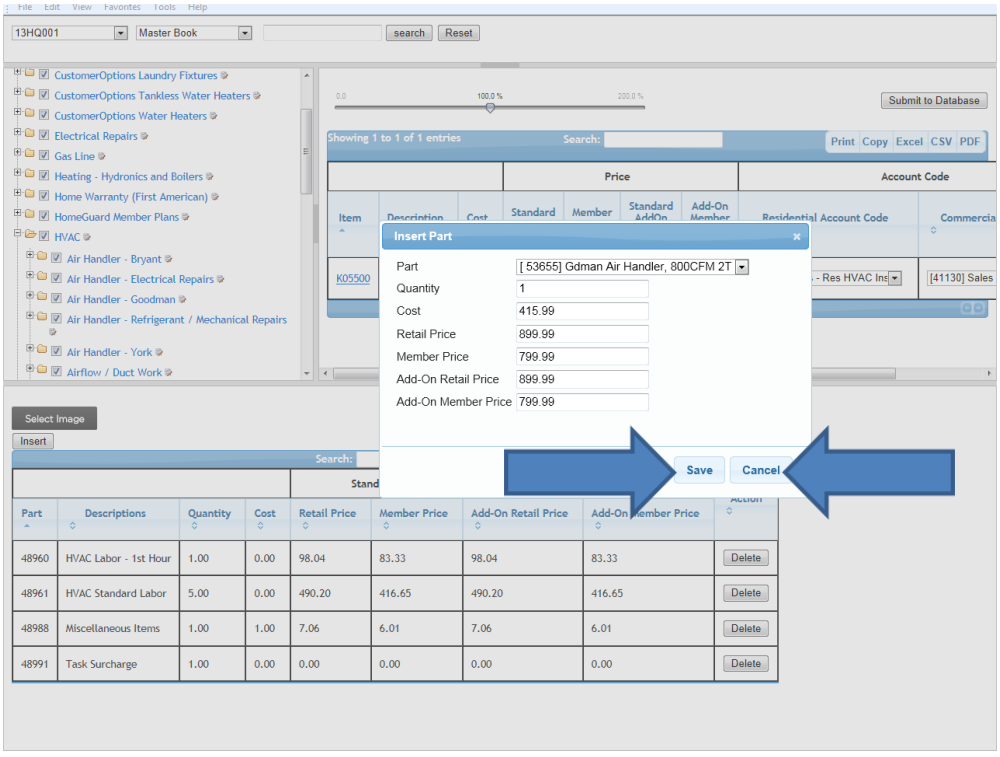
Click the dropdown box to see the list of parts



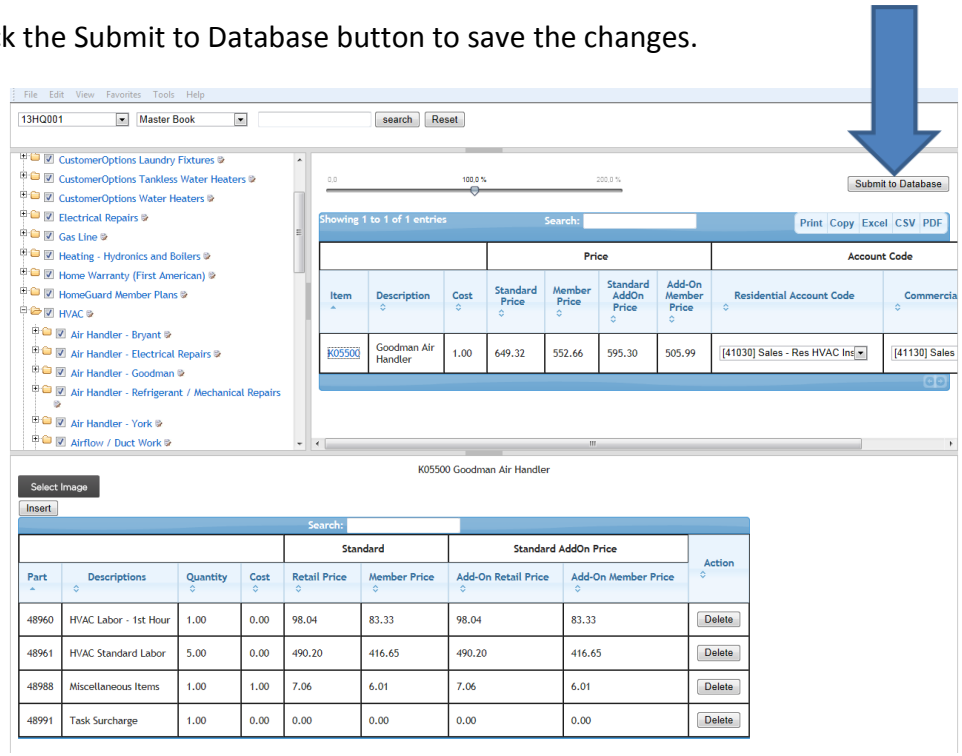
Select the part you would like to add to the assigned task



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.

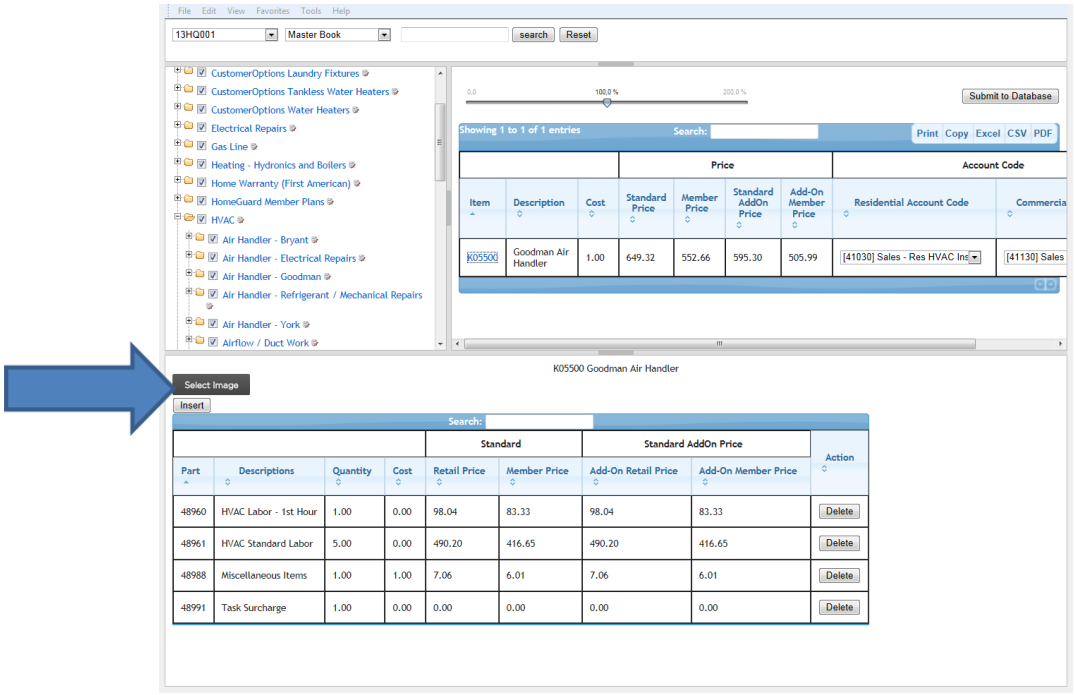


Click the Submit to Database button to save the changes.

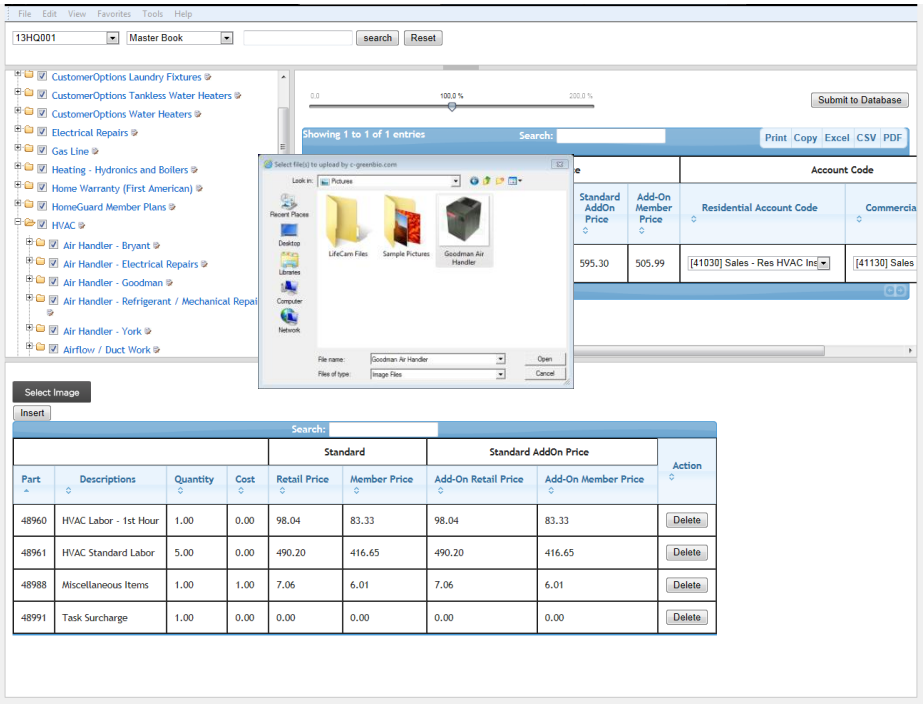
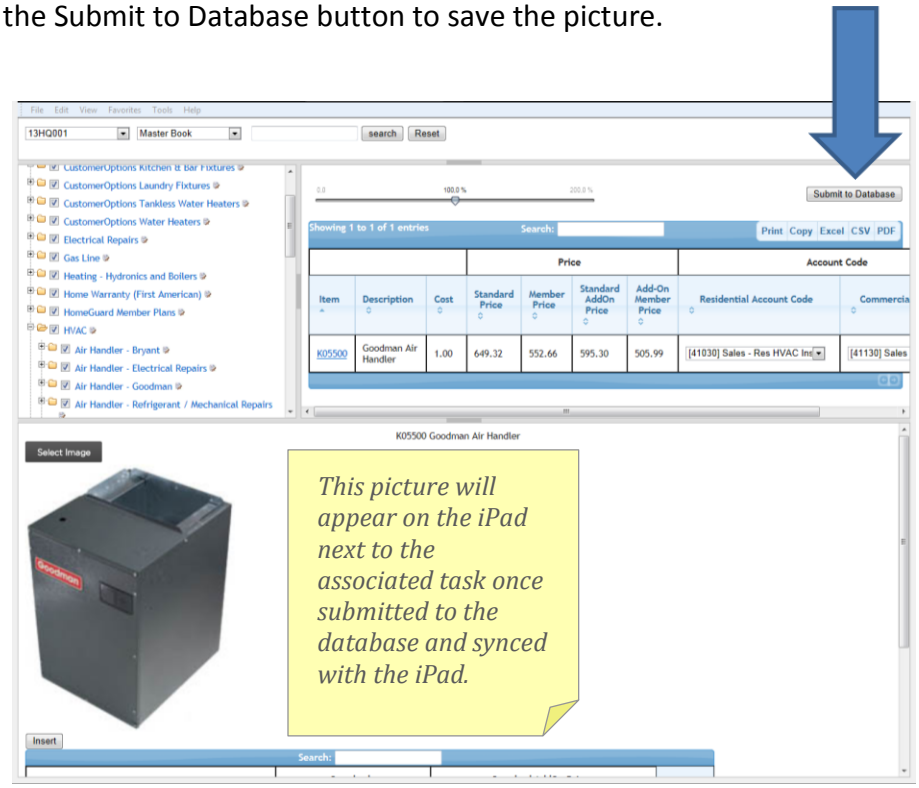


6.3 Adding Images to a Task

Click on the Select Image button.



Select the picture from your local computer drive.



Click the Submit to Database button to save the picture.