How to set up Pricebook categories and subcategories

ServiceTitan Best Practices

Consider how you want your Pricebook to appear in Mobile

The most important thing to consider when setting up your Pricebook categories and subcategories is how your Pricebook is used in the field. You should set up your Pricebook so technicians can easily navigate your Pricebook when talking to customers.

➔ Note: Pricebook items will not appear in Mobile unless they are assigned to a category or subcategory.

Use category and subcategory images to make your Pricebook look complete

You may not have a unique image for every item in your Pricebook, and that's OK. You can upload category and subcategory images to make your Pricebook look more complete and customer-friendly. This article will show you how to do it.

You can set up Pricebook categories for office use only (account configuration required)

Please be aware that your account can be configured so you control which Pricebook categories technicians will be able to access. This is a useful feature if you want to set up Pricebook categories for tasks that will be for office use only.

For example, you may want to set up a Pricebook category for deferred revenue tasks or manager discounts. When these features are enabled for your account, you would be able to set up a Pricebook category called "Manager Discounts" and restrict this category from appearing in Mobile.

If you are interested in this feature, please contact your Implementation Specialist or Success Manager.

## What you will find in this article

Pricebook categories and subcategories - How they work

As you set up your categories and subcategories, remember that **this will determine how your Pricebook is going to appear in Mobile**

Things to remember:

➢ Pricebook items will <u>not</u> be visible in Mobile, unless assigned to a category or subcategory.

➢ By default all of your Pricebook categories and subcategories are visible in Mobile, unless your account is configured to restrict technician access to certain categories.
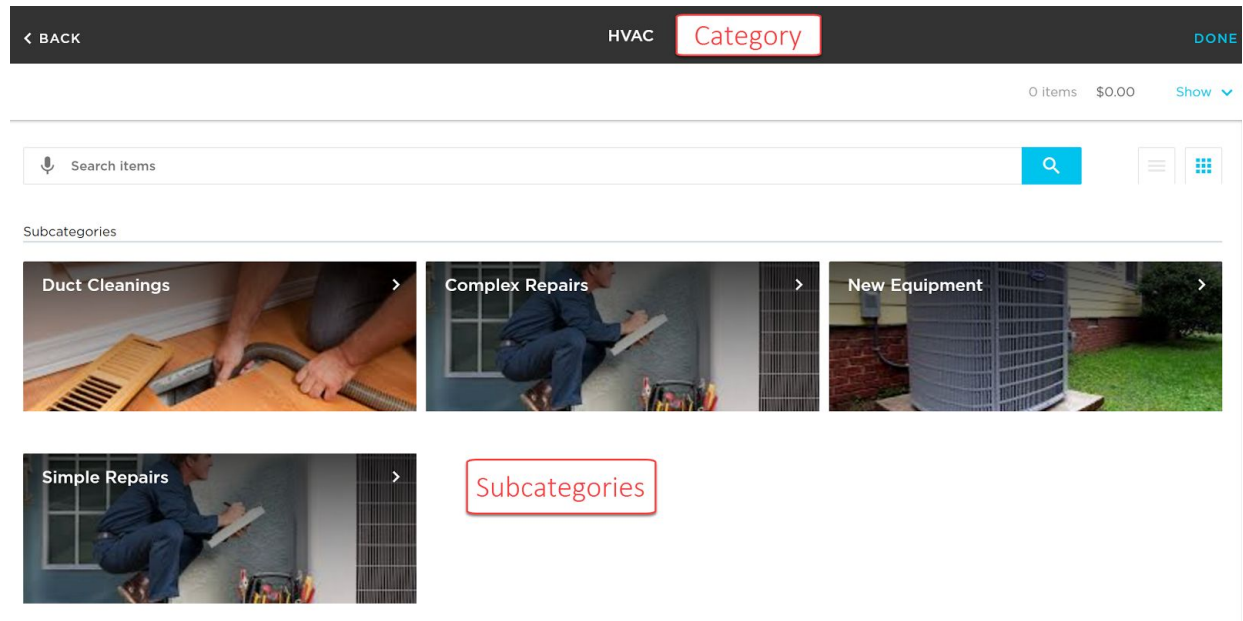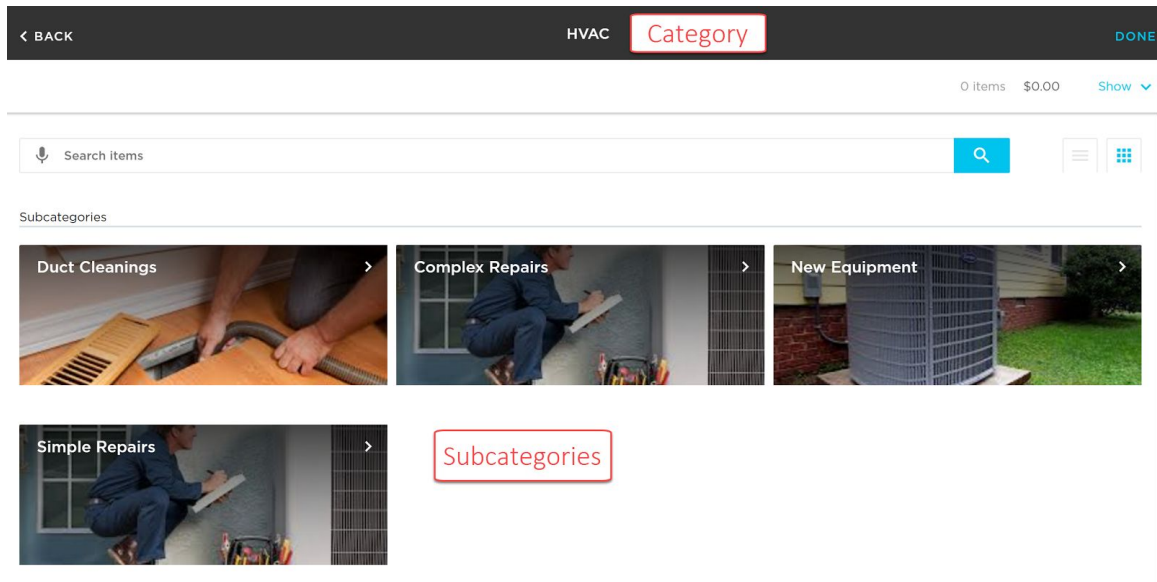
You can upload category and subcategory images, to make your Pricebook look complete

Go to Settings > Pricebook > Categories. Click into category or subcategory. Then, use the **Upload** button next to *Category Image* to upload an image for the category or subcategory.
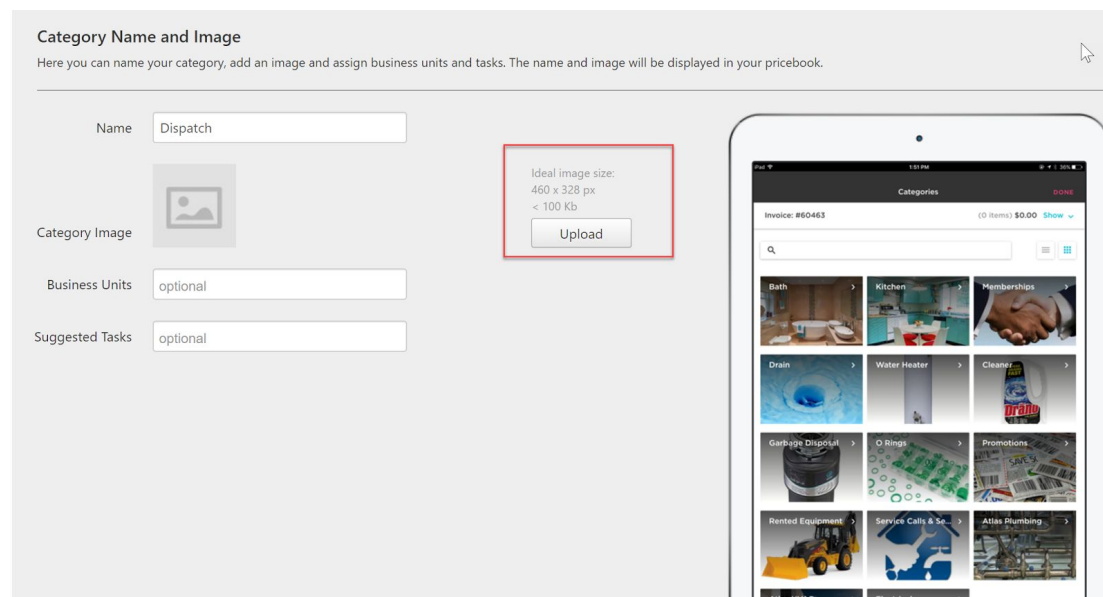

The images you upload for categories and subcategories will be visible in Mobile.

You can upload default images, in case you don't have a unique image for every Pricebook item quite yet

You can upload a default image for every item within a category or subcategory. Go to Settings > Pricebook > Categories. Click into the category or subcategory. Scroll down to *Default Image for Every Item in Category / Subcategory*. Then, use the **Upload** or **Add** buttons to upload default images or videos.
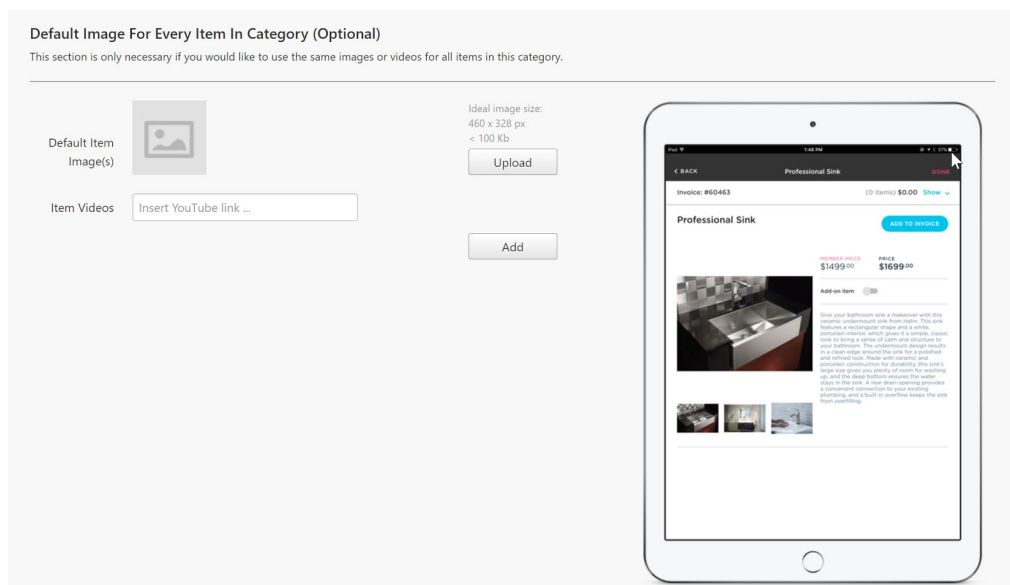

The default image / video will be used for every item in the category or subcategory, if no other image / video is available.

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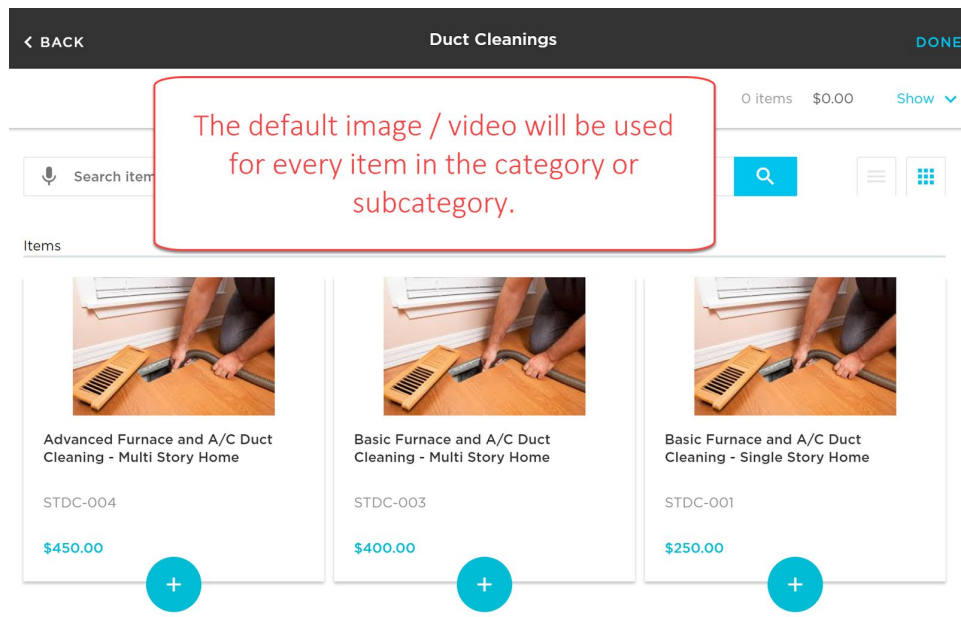
You can **assign categories and subcategories to business units**

When you assign a category to subcategory to a business unit, only the technicians working within that business unit will be able to see those Pricebook items.

For example, you may want HVAC technicians to see Pricebook items for the HVAC Pricebook category only.

You can assign categories and subcategories to business units.

For example, you may want HVAC technicians to see Pricebook items for HVAC only.
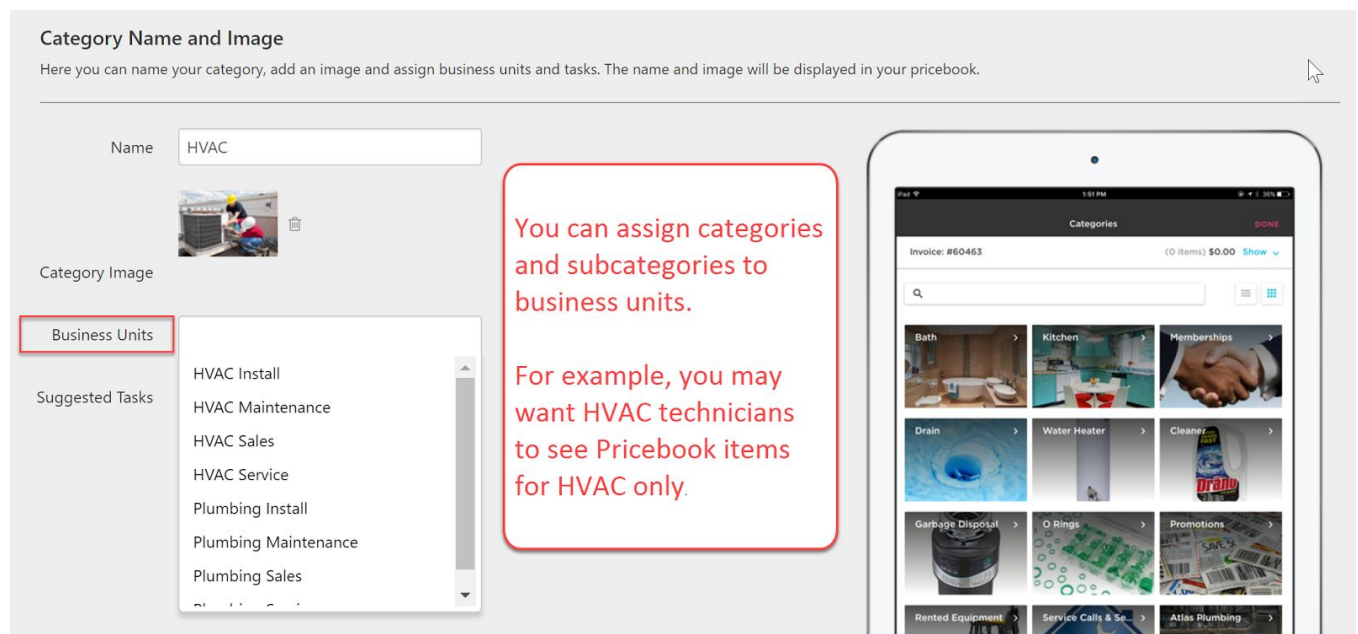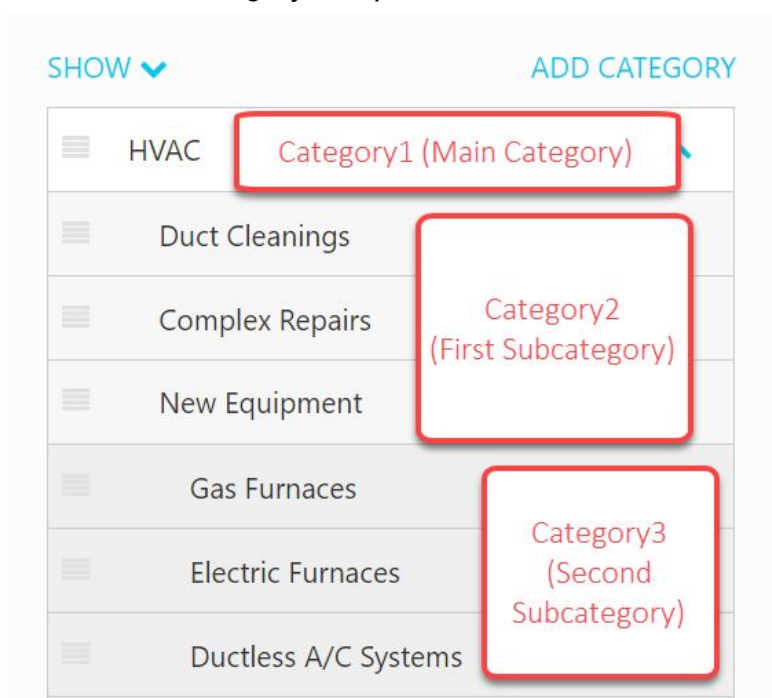
Setting up Pricebook categories and subcategories: ServiceTitan vs. the Pricebook Excel Template

It is recommended that you set up Pricebook categories and subcategories directly in ServiceTitan (don't use the Pricebook Excel Template)

We recommend that you set up your Pricebook categories and subcategories directly in ServiceTitan, then export your Pricebook. This will help you avoid import errors.

Here's an example of a category setup in ServiceTitan. When you export your Pricebook, all of your categories and subcategories will be properly formatted in the Pricebook Excel Template.

Category setup in ServiceTitan

How categories and subcategories will look in the Pricebook Excel Template

Once your categories and subcategories have been set up within ServiceTitan, use the Pricebook Excel Template to assign categories and subcategories
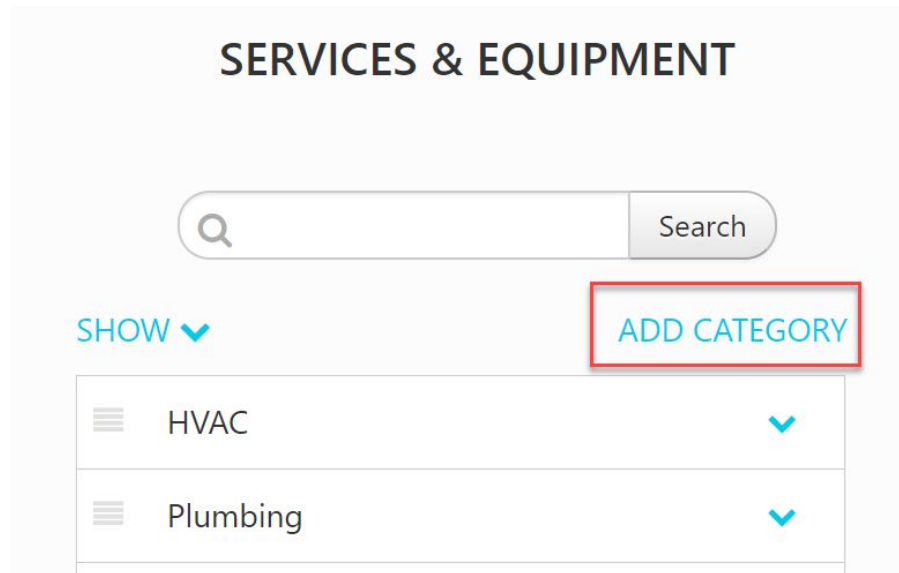
When you are importing a new Pricebook or doing a mass reorganization of your Pricebook, you will need to assign categories and subcategories to many Pricebook items at once. We recommend that you use the Pricebook Excel Template to assign categories and subcategories in bulk.

Within the Pricebook Excel Template, simply enter the category or subcategory in the *Category.Name* column next to the item.
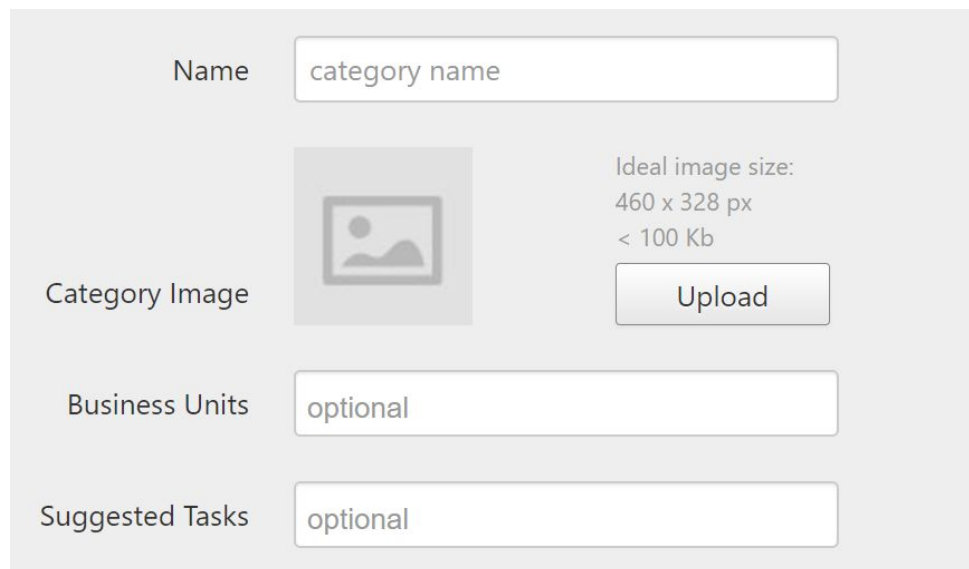
How to set up a Pricebook category in ServiceTitan

1. Go to **Settings** > *Pricebook* > *Categories* tab.

2. Click **Add Category** located under *Services & Equipment*. Note: You may also add a category for materials / inventory by clicking **Add Category** under *Materials*.

3. Enter the category fields as desired. Note: *Name* is a required field.

Name	Name of the category, as it will appear in Mobile.
Category Image	Standard image for the category, which will be visible in Mobile. Click **Upload** to upload an image (the image must be saved on your computer).
Business Units	When you enter business units, only technicians working within those business units can access this Pricebook category. If this field is left blank, all technicians will have access to the Pricebook category. ● *For example:* You may want to have an HVAC category restricted to your HVAC business units.
Suggested Tasks	Enter any suggested tasks for the category, so technicians will know to recommend these items (optional).

4. Scroll down to *Default Image for Every Item in Category (Optional)* to upload default images / videos for the category.

Default Image For Every Item In Category (Optional)

This section is only necessary if you would like to use the same images or videos for all items in this category.

Default Item Image(s)

Item Videos   Insert YouTube link ...
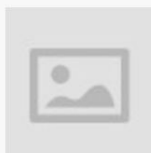
Ideal image size:
460 x 328 px
< 100 Kb

Upload

Add

● It is *highly recommended* that you upload a default image / video to every category, to make your Pricebook look complete. This is very useful if you don't have an image for every item in your Pricebook quite yet.

Default Item Image(s)	Click **Upload** to upload an image (the image must be saved on your computer).
Item Videos	To attach a video, copy the YouTube URL from the **address bar** at the top of your browser. Paste the URL into the **Videos** field, then click **Add**. You can add multiple videos if desired. ○ Note: Do <u>not</u> use the YouTube URL from the Share button under the video (make sure to copy the URL from the **address bar**).

5. When you are done setting up the category, make sure to click **Save** at the bottom of the screen.

How to set up Pricebook subcategories in ServiceTitan

Setting up a subcategory is very similar to setting up a category.

1. Go to Settings > Pricebook > Categories. Click into the desired category, where you want the subcategory to appear.
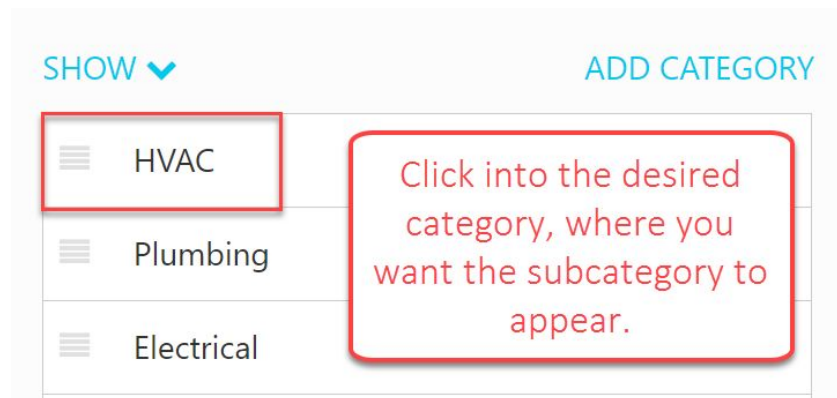
2. This will take you to the category settings. Click **Add Sub Category**, located to the top right of the screen.
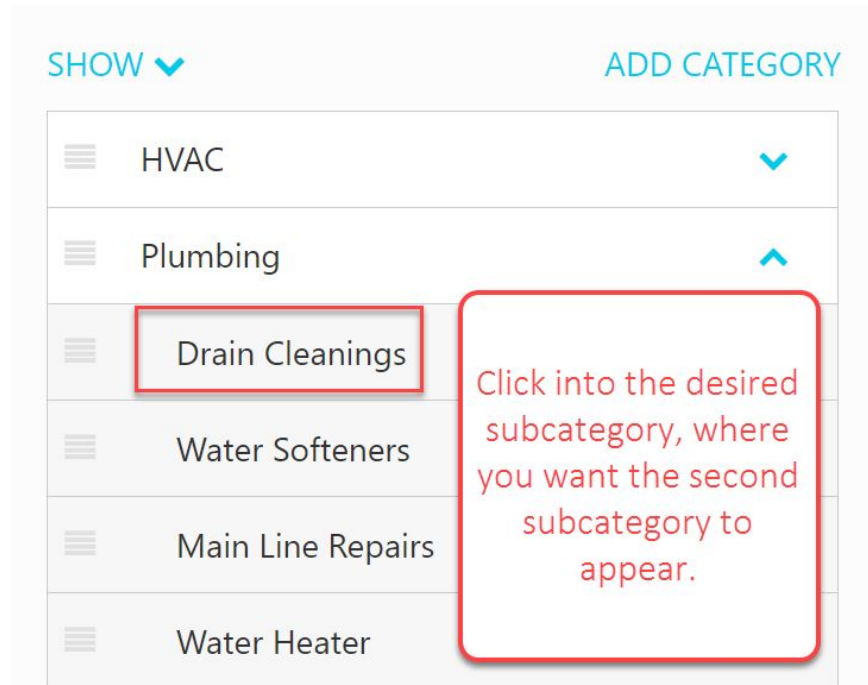

3. Proceed to set up the subcategory, just as you would set up a category (refer to instructions above).

Setting up a second subcategory (subcategory within a subcategory)

You can also set up subcategories within a subcategory, if you want to organize items within a subcategory.

1. Go to Settings > Pricebook > Categories. Click into the desired subcategory, where you want the second subcategory to appear.

4. This will take you to the subcategory settings. Click **Add Sub Category**, located to the top right of the screen.

ADD SUB CATEGORY

5. Proceed to set up the second subcategory, just as you would set up a category (refer to instructions above).
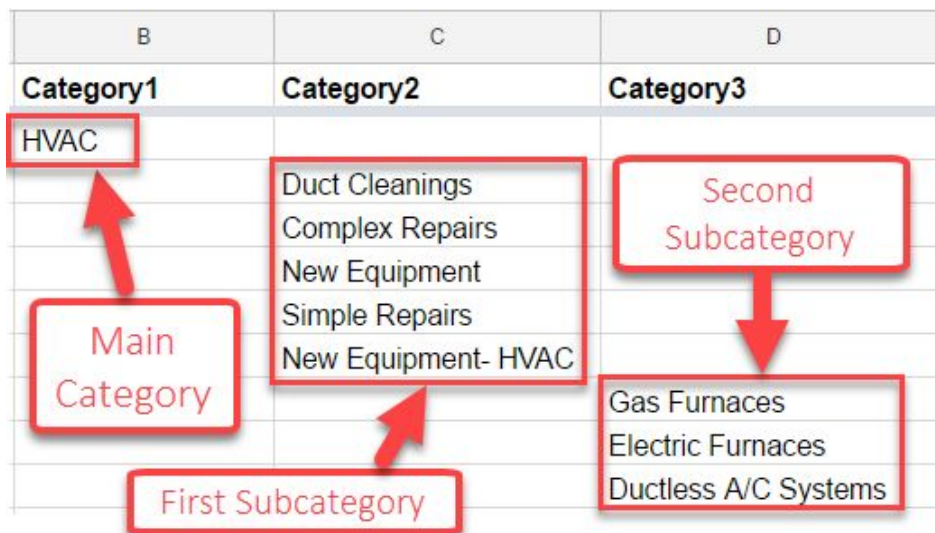
Assigning categories and subcategories using the Pricebook Excel Template

It highly recommended that you set up categories and subcategories directly in ServiceTitan, before you do the Pricebook export. That way, your categories and subcategories will be set up properly within the Excel document.

How categories and subcategories are formatted within the Pricebook Excel Template:

- *Category1* column - The main category.
- *Category2* column - Subcategory. All subcategories must appear under the main category.
- *Category3* column - A subcategory within a subcategory. These must appear under the respective subcategory.

How do I assign a category or subcategory to a Pricebook item?

Go to the *Services, Equipment,* or *Materials* sheet (wherever the item is located). Simply enter the category or subcategory in the *Category.Name* column next to the item.

B	C	D
Category.Name	**Id**	**Name**
New Equipment	445	Split System
GEAR KITS	446	Air Conditioner
New Equipment	447	Air Conditioning Condenser
Heat Pump Cond	448	Heat Pump Condenser
Air Handler	449	Air Handler

Remember:
➢ Every category or subcategory you use must be listed in the *Categories* sheet within the Excel document.
➢ Pricebook items will <u>not</u> be visible in Mobile unless assigned to a category or subcategory.

What if I want to assign a Pricebook item to a subcategory?

Simply put the subcategory name in the *Category Name* column (there is no need to designate the main category, only the subcategory). For example, if you want a Pricebook item to appear in the subcategory "New Equipment" you would simply enter "New Equipment" in the *Category Name* column.