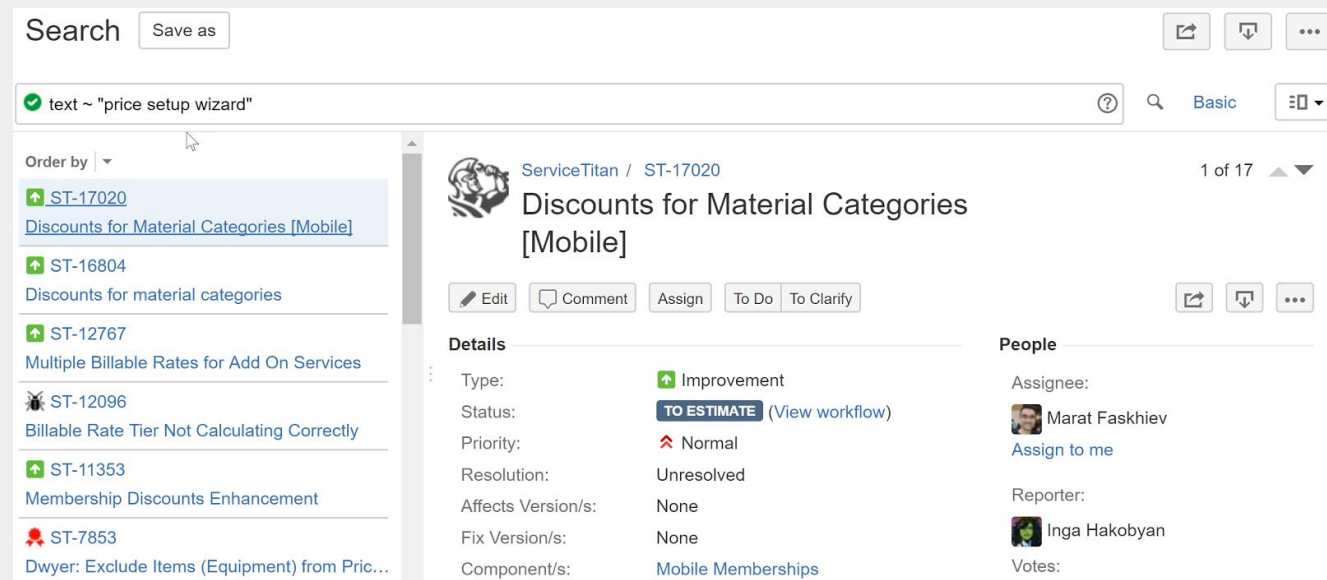


Marie Smart
Technical Writing Sample
Customer-facing documentation
& Example of my participation in the software development process

About this writing sample

This is an example of customer-facing documentation. I have written more than one thousand (1000+) pages of customer-facing documentation on topics that cover accounting, inventory, dispatching, payroll, and all functionality of the ServiceTitan software.

Documentation is sourced both from JIRA and product requirements



The screenshot shows a JIRA interface with a search bar at the top containing the text "text ~ 'price setup wizard'". Below the search bar is a list of tickets on the left, including "ST-17020 Discounts for Material Categories [Mobile]", "ST-16804 Discounts for material categories", "ST-12767 Multiple Billable Rates for Add On Services", "ST-12096 Billable Rate Tier Not Calculating Correctly", "ST-11353 Membership Discounts Enhancement", and "ST-7853 Dwyer: Exclude Items (Equipment) from Pric...". The main area displays the details of ticket "ST-17020 Discounts for Material Categories [Mobile]". The ticket is categorized as an "Improvement" with a status of "TO ESTIMATE" and a priority of "Normal". It is assigned to "Marat Faskhiev" and reported by "Inga Hakobyan". The ticket details include: Type: Improvement, Status: TO ESTIMATE (View workflow), Priority: Normal, Resolution: Unresolved, Affects Version/s: None, Fix Version/s: None, and Component/s: Mobile Memberships.

In order to produce the documentation below, I reviewed approximately 100 JIRA tickets (including epics, tasks, and bugs) and reviewed dozens of pages of product requirements.

When I work on documentation such as this, my role is not limited to technical writing. I also heavily participate in crafting revisions to product requirements, flushing out necessary details within the product requirements, verifying calculations, reviewing product requirements & identifying feature gaps (where feature conflicts might occur, where additional functionality is required for features to work together, etc), and participating in the QA process.

Price Setup Wizard:

Automate pricing for services, equipment, or chargeable materials

ServiceTitan Best Practices

When it's time to update prices in your Pricebook, ServiceTitan can automate the process for you. Using the *Price Setup Wizard*, you can make global pricing changes in just a few clicks.

Reasons to use the Price Setup Wizard:

- ★ You can fully automate Pricebook updates, including regular pricing and add-on pricing.
- ★ The Pricebook history is great for record-keeping and for peace of mind. If it's ever necessary, you can always use your Pricebook history to upload a previous version of your Pricebook.

How it works

You can run the *Price Setup Wizard* across the entire Pricebook, or you can select specific Pricebook categories

You can run the *Price Setup Wizard* across the entire Pricebook or you can choose specific Pricebook categories only. This gives you the flexibility to use different pricing criteria for different types of services, or for different business units.

Quick Reference Guide

Please select categories below:

☐ Select All

☐ BATTERIES

☐ BEARINGS

☐ BELT RAIL

You will enter a **billable rate per hour, optional surcharge, and member discount**

First, you will enter primary pricing criteria (billable rate per hour, optional surcharge, and member discount). This criteria will be used to calculate the regular *Price* and *Member Price*.

- The billable rate per hour will be multiplied by sold hours entered in the Pricebook.
Note: You'll have the option to enter multiple billable rates.
- The surcharge will be added as a flat amount on top of item prices.
- The member discount will be used to calculate the *Member Price* of each item. Note:
Your account can be configured so you control how the member discount is applied.

Billable Rate (hr)	\$ 150
(multiplied by sold hours)	
Want multiple billable rates? click here	
Surcharge	\$ 25
(added as a flat amount on top of item prices)	
Member Discount	10 %
(used to calculate the Member Price)	

You will enter **add on pricing criteria**

The add on pricing criteria will be used to calculate the *Add On Price* and *Member Add On Price*.

Primary

You will set criteria for the regular price and member price

Billable Rate (hr)

\$ 150

Want multiple billable rates?

[click here](#)

Surcharge

\$ 50

Member Discount

10 %

Add On

Then, you will set criteria for the add-on price and member add-on price

Billable Rate (hr)

\$ 125

Surcharge

\$ 40

Member Discount

5 %

Material costs will be added and material mark-ups will be applied

If there are materials attached to a service, the *Price Setup Wizard* will automatically include material costs to the service price. If you have set up material mark-up rates in your Pricebook, material mark-ups will also be applied.

→ Please note: When you enter new mark-ups, these mark-ups will *not* be instantly applied (you must run the Price Setup Wizard to apply the mark-up).

Materials

\$ 0.00

to

\$ 100.00

apply a

% 15.00

⊖

\$ 101.00

to

\$ 200.00

apply a

% 20.00

⊖

You will have the opportunity to preview new pricing

The *Price Setup Wizard* will calculate the item *Price*, *Member Price*, *Add On Price*, and *Member Add On Price* based on pricing criteria you entered into the wizard. Remember: Material costs and mark-ups will be included in service prices. You'll be able to preview new pricing before committing to any changes.

Does this look about right?

GO BACK SAVE

SKU	Model #	Display Name	CURRENT PRICING				NEW PRICING			
			Price	Member	Add On	M Add On	Price	Member	Add On	M
2		475 LM Battery Backup	\$550.00	\$495.00	\$435.00	\$413.25	\$600.00	\$540.00	\$475.00	
3		485 LM Battery Backup	\$800.00	\$720.00	\$635.00	\$603.25	\$875.00	\$787.50	\$695.00	

Once you approve new pricing, the *Price Setup Wizard* will update item prices for you

Once you approve new pricing, the *Price Setup Wizard* will update item prices in your Pricebook for all the categories you selected. The *Price Setup Wizard* will update the *Price*, *Member Price*, *Add On Price*, and *Member Add On Price*.

Price ⓘ

Member Price ⓘ

Add On Price ⓘ

Member Add On Price ⓘ

You can always review your Pricebook history and download any previous version of your Pricebook

You will be able to review your Pricebook history and download any previous version of your Pricebook at any time.

Pricebook									
Categories		Services		Materials		Equipment		Price Setup	
								History	
DATE	USER	PRIMARY		ADD ON		SOURCE	BEFORE		AFTER
		HR	RT	SUR.	HR	RT	SUR.		
3/18/2016 12:53 PM		\$275		\$0	\$220		\$0	Wizard	.XLS

Troubleshooting & Important Things to Note

- *Individual vs. Aggregate Material Mark-Ups* - Your account can be configured for individual or aggregate material mark-ups.
- *Ability to exclude items* - You will have the ability to exclude specific Pricebook items from the *Price Setup Wizard*. The *Price Setup Wizard* will not change pricing for excluded Pricebook items.
- *Use the Price Setup Wizard for chargeable materials* - If your account is configured for chargeable materials (if you add materials as line items on customer-facing invoices), you can use the *Price Setup Wizard* to set the customer-facing material price.
- *Control how the member discount is applied* - By default, the member discount will be applied to the full item price (including labor, materials, and the surcharge). Your account can be configured so you control whether the member discount is applied to labor only, labor and materials only, or to the full item price (labor, materials, and the surcharge).
- *Minimum Labor Time* - You will have the option to enter minimum labor time in your Pricebook. Minimum labor time allows you to track the expected time on the job, separately from the sold hours you would like to charge to the customer.

Required Setup and Instructions

The *Price Setup Wizard* is not enabled by default. To use this feature, contact your Success Manager or Implementation Specialist / Onboarder to configure your account.

Before you begin using the *Price Setup Wizard*, you will need to perform the following Pricebook setup.

Pricebook Setup: Enter sold hours in the Pricebook

The *Price Setup Wizard* will calculate prices based on sold hours entered in your Pricebook. To enter sold hours, you can do one of the following:

- *Enter sold hours item-by-item*: Go to Settings > Pricebook. When you click to edit a service, material, or equipment, you will see the sold hours field (*Hours*) under the *Commission* tab.
- *Enter sold hours in bulk*: If you have to update many items at once, it is best to export then re-import your Pricebook. To do this, go to Settings > Import / Export Data. If you are unfamiliar with this process, your Implementation Specialist or Success Manager can assist you.

Pricebook Setup: Set material mark-up rates

The *Price Setup Wizard* will include material costs, with material mark-ups, when it calculates prices. You can set material mark-up rates in Settings > Pricebook > Materials.

- Note: If you don't see the material mark-up table, contact your Implementation Specialist or Success Manager to configure your account.

Instructions / How To's

How to run the Price Setup Wizard	9
Step One: Select Categories	9
Step Two: Enter Billable Rate, Surcharge, and Member Discount	11
Step Three: Review and Confirm New Pricing	13
How item prices are calculated when you use the Price Setup Wizard	15
Price Setup Wizard Calculations	15
Sample Calculation "A" - No Material Costs	17
Sample Calculation "B" - With Material Cost and Material Mark-Up	19
Using multiple billable rates	21
Configure your account to control how the member discount is applied	24
How to exclude Pricebook items from the Price Setup Wizard	26
Individual vs. aggregate material mark-ups	27
Sample Calculation "A" (Price Setup Wizard) - Individual material mark-ups	28
Sample Calculation "B" (Price Setup Wizard) - Aggregate material mark-ups	29
How to access your Pricebook history (or reinstate a previous version of your Pricebook)	30

How to run the *Price Setup Wizard*

The *Price Setup Wizard* consists of three easy steps:

Step One: Select Categories



Step Two: Enter Billable Rate, Surcharge, and Member Discount

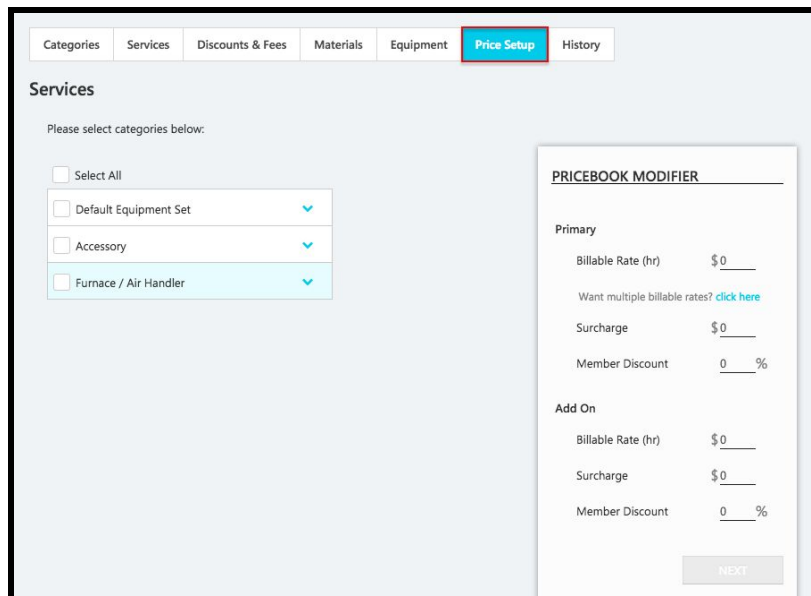


Step Three: Review and Confirm New Pricing

Read below for more information on each of these steps.

Step One: Select Categories

1. Navigate to Settings > Pricebook > Price Setup. This will take you to the *Price Setup Wizard*.



The screenshot shows the 'Price Setup Wizard' interface. At the top, there is a navigation bar with tabs: Categories, Services, Discounts & Fees, Materials, Equipment, Price Setup (highlighted with a red box), and History. Below the navigation bar, the 'Services' section is active. It contains a heading 'Please select categories below:' and a list of categories with checkboxes: 'Select All', 'Default Equipment Set', 'Accessory', and 'Furnace / Air Handler'. To the right of the categories list is a 'PRICEBOOK MODIFIER' panel. This panel has two sections: 'Primary' and 'Add On'. Each section contains fields for 'Billable Rate (hr)', 'Surcharge', and 'Member Discount'. The 'Primary' section has a link 'Want multiple billable rates? click here' next to the 'Surcharge' field. At the bottom of the 'PRICEBOOK MODIFIER' panel is a 'NEXT' button.

Quick Reference Guide

2. Use the **Services** section of the *Price Setup Wizard* to update prices for *Services* or *Equipment*.

Services

Please select categories below:

☐ Select All

<input type="checkbox"/> Default Equipment Set	▼
<input type="checkbox"/> Accessory	▼
<input type="checkbox"/> Furnace / Air Handler	▼

3. If your account is configured for chargeable materials (charge for materials with flat rate billing), use the **Materials** section to update customer-facing material pricing.
 - a. If you are using the **Materials** section, all the following *Price Setup Wizard* steps will be the same.
 - b. Note: You *cannot* run the *Services* and *Materials* sections of the *Price Setup Wizard* at the same time.

Materials

Please select categories below:

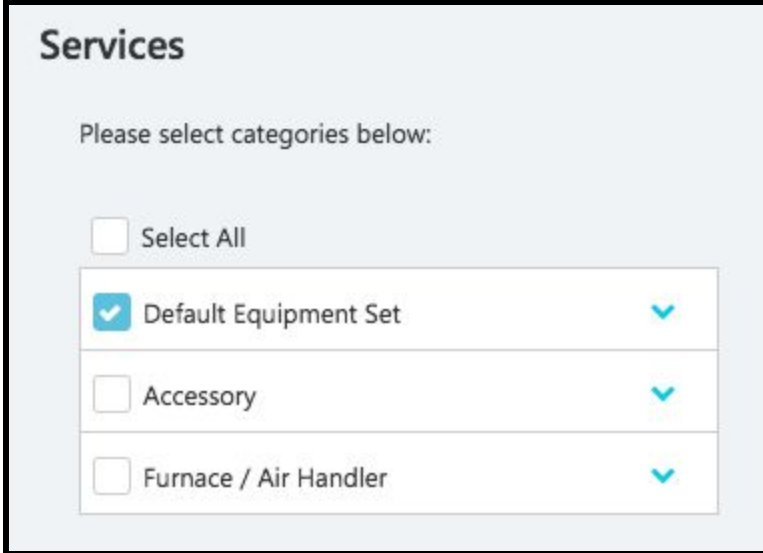
☐ Select All

<input type="checkbox"/> Elbow Joints
<input type="checkbox"/> Bolts
<input type="checkbox"/> Capacitors ▼

If your account is configured for chargeable materials, use the **Materials** section to update customer-facing material pricing.

4. Select the categories (or single category) of your Pricebook where you want to run the *Price Setup Wizard*.

- a. To run the *Price Setup Wizard* across the entire Pricebook, click *Select All* at the top of the categories list.



The screenshot shows a light blue box titled "Services". Inside, it says "Please select categories below:". There are three selection options, each with a checkbox and a dropdown arrow. The first option is "Select All" with an unchecked checkbox. The second option is "Default Equipment Set" with a checked checkbox. The third option is "Accessory" with an unchecked checkbox. The fourth option is "Furnace / Air Handler" with an unchecked checkbox.

5. Once you select categories (or a single category), the **Next** button will activate. However, before clicking **Next** you'll need to complete *Step Two* below.

Step Two: Enter Billable Rate, Surcharge, and Member Discount

You will now enter pricing criteria.

1. In the *Primary* section, enter the following: **Billable Rate (hr)***, **Surcharge**, and **Member Discount**. This pricing criteria will be used to calculate the *Price* and *Member Price*.
 - a. For more details, see *Price Setup Wizard Calculations* below.
 - b. **Billable Rate (hr)** can be set up as multiple billable rates, determined by sold hours. For more information, refer to *Using Multiple Billable Rates*, available below.
 - c. Your account can be configured so you control whether the **member discount** is applied to labor only, labor and materials only, or to the full item price (labor, materials, and the surcharge). For more information, refer to *Configure your account to control how the member discount is applied*, available below.

Quick Reference Guide

Billable Rate (hr)	\$ <u>150</u>
(multiplied by sold hours)	
Want multiple billable rates? click here	
Surcharge	\$ <u>25</u>
(added as a flat amount on top of item prices)	
Member Discount	<u>10</u> %
(used to calculate the Member Price)	

2. In the *Add On* section, enter the following: **Add On Billable Rate (hr)**, **Add On Surcharge**, and **Add On Member Discount**. These values will be used to calculate the *Add On Price* and *Member Add On Price*.
- a. For more details, see *Price Setup Wizard Calculations* below.

Add On	After you enter primary pricing criteria, you will enter criteria for add on pricing.
Billable Rate (hr)	\$ <u>125</u>
Surcharge	\$ <u>20</u>
Member Discount	<u>5</u> %

3. When you are done, click **Next**.

Step Three: Review and Confirm New Pricing

1. You will see a screen that displays *Current Pricing* next to the *New Pricing* generated by the Price Setup Wizard. Note: Your Pricebook will not be updated with *New Pricing* until you click **Save**.
 - a. If something doesn't look right, click **Go Back** and adjust price settings as desired.

Does this look about right?

GO BACK SAVE

SKU	Model #	Display Name	CURRENT PRICING				NEW PRICING			
			Price	Member	Add On	M Add On	Price	Member	Add On	M Add On
2		475 LM Battery Backup	\$550.00	\$495.00	\$435.00	\$413.25	\$600.00	\$540.00	\$475.00	
3		485 LM Battery Backup	\$800.00	\$720.00	\$635.00	\$603.25	\$875.00	\$787.50	\$695.00	

2. Once you are satisfied with the *New Pricing*, click **Save**.
3. If you do not have *Sold Hours* entered for all your Pricebook items, you will be prompted with a warning message.
 - a. If you want to save changes anyway, click **OK** (but be aware that base pricing will be zeroed out - see *Price Setup Wizard Calculations*).



4. Once your pricing changes are saved, you will be brought to the *History* tab. You will see that a new line has been added to the *History* tab, timestamped to when you saved the new pricing.
 - a. Note: If for any reason you decide you need to undo pricing changes, you may download the previous version of your Pricebook, then re-import your previous Pricebook by navigating to Settings > Import / Export Data.

Pricebook

[Categories](#)[Services](#)[Materials](#)[Equipment](#)[Price Setup](#)[History](#) 

DATE	USER	PRIMARY		ADD ON		SOURCE	BEFORE	AFTER
		HR RT	SUR.	HR RT	SUR.			
3/18/2016 12:53 PM		\$275	\$0	\$220	\$0	Wizard	.XLS	.XLS

How item prices are calculated when you use the *Price Setup Wizard*

Red - Data pulled from the Pricebook

Blue - Pricing criteria entered when you run the *Price Setup Wizard*

Price Setup Wizard Calculations	
Price <div>Price ⓘ <input type="text" value="\$ 712.50"/></div>	$[\text{Sold Hours} \times \text{Billable Rate (hr)}]$ + $[\text{Surcharge}]$ + $[\text{Material costs}]$ + $[\text{Materials costs} \times \text{Mark-up rate}]$
Member Price <div>Member Price ⓘ <input type="text" value="\$ 641.25"/></div>	Price - $[\text{Calculated member discount}]$
Add On Price <div>Add On Price ⓘ <input type="text" value="\$ 587.50"/></div>	$[\text{Sold Hours} \times \text{Billable Rate (hr)}]$ + $[\text{Add On Surcharge}]$ + $[\text{Material costs}]$ + $[\text{Material costs} \times \text{Mark-up rate}]$
Member Add On Price <div>Member Add On Price ⓘ <input type="text" value="\$ 558.13"/></div>	Add On Price - $[\text{Calculated member discount}]$

Things to note about *Price Setup Wizard* calculations

- ★ *Multiple billable rates* - **Billable Rate (hr)** can be set up as multiple billable rates, determined by sold hours. For more information, refer to *Using Multiple Billable Rates* below.
- ★ *Member Price vs. Membership Discount* - If the customer has a discount as part of a membership plan, the customer will not receive a *double discount*. The customer will either get the **member price** listed in the Pricebook, or the membership plan discount will be applied to the regular item price (ServiceTitan will automatically select the lower of the two).
- ★ *Individual vs. aggregate mark-ups* - When the material mark-up table is configured for your account, you will choose **individual or aggregate mark-ups**. With individual mark-ups, mark-up rates will be applied at the individual item level. With aggregate mark-ups, the sum of material costs will determine the material mark-up rate. For more information, refer to *Individual versus aggregate material mark-ups*, available further on in this guide.

Additional configurations are available (contact your Implementation Specialist or Success Manager to turn on these features):

- ★ *Minimum labor time* - Your account can be configured for **minimum labor time** in addition to sold hours. Minimum labor time allows you to track time expected on the job, separate from the sold hours you want to charge to the customer. If for any reason the minimum labor time exceeds sold hours, the *Price Setup Wizard* will use minimum labor time (not sold hours) when it calculates prices.
- ★ *Control how the member discount is applied* - Your account can be configured so you control whether the **member discount** is applied to labor only, labor and materials only, or to the full item price (labor, materials, and the surcharge). For more information, refer to *Configure your account to control how the member discount is applied*, available below.

Sample Calculation "A" - No Material Costs

Let's assume the following data has been pulled from the Pricebook:

Sold Hours: 2

Material Costs: \$0 (No material cost entered)

Material Mark-Up Rate: N/A (No material mark-up)

Let's assume the following data is entered in the *Price Setup Wizard*:

ATTRIBUTE MODIFIER	
Primary	
Billable Rate (hr)	\$ 275
Surcharge	\$ 50
Member Discount	10 %
Add On	
Billable Rate (hr)	\$ 220
Surcharge	\$ 35
Member Discount	5 %
<input type="button" value="Next"/>	

Billable Rate (hr) = \$275

Surcharge = \$50

Member Discount = 10%

Add On Billable Rate (hr) = \$220

Add On Surcharge = \$35

Add On Member Discount = 5%

Quick Reference Guide

The Price Setup Wizard would calculate prices as follows:

Price: [2 sold hours x \$275 billable rate] + \$50 surcharge = **\$600**

Member Price: \$600 price - 10% member discount = **\$540**

Add On Price: [2 sold hours x \$220 billable rate] + \$35 surcharge = **\$475**

Member Add On Price: \$475 add on price - 5% member discount = **\$451.25**

Price ⓘ	<input type="text" value="600.00"/>
Member Price ⓘ	<input type="text" value="540.00"/>
Add On Price ⓘ	<input type="text" value="475.00"/>
Member Add On Price ⓘ	<input type="text" value="451.25"/>

Sample Calculation "B" - With Material Cost and Material Mark-Up

Let's assume the following data has been pulled from the Pricebook:

Sold Hours: 2

Material Cost: \$90

Material Mark-Up Rate: 25%

→ Note: In these sample calculations, individual mark-ups (not aggregate) are applied.

Let's assume the following data is entered in the *Price Setup Wizard*:

ATTRIBUTE MODIFIER

Primary
Billable Rate (hr) \$ 275
Surcharge \$ 50
Member Discount 10 %

Add On
Billable Rate (hr) \$ 220
Surcharge \$ 35
Member Discount 5 %

Next

Billable Rate (hr) = \$275

Surcharge = \$50

Member Discount = 10%

Add On Billable Rate (hr) = \$220

Add On Surcharge = \$35

Add On Member Discount = 5%

Quick Reference Guide

The Price Setup Wizard would calculate prices as follows:

→ Note: These calculations are similar to *Sample Calculation "A"* above. However, the item now has a materials cost of \$90 and a 25% mark-up. Individual mark-ups are applied.

Price: [2 sold hours x \$275 billable rate] + \$50 surcharge + [\$90 materials cost + 25% material mark-up rate] = **\$712.50**

Member Price: \$712.50 price - 10% member discount = **\$641.25**

Add On Price: [2 sold hours x \$220 billable rate] + \$35 surcharge + [\$90 materials cost + 25% material mark-up rate] = **\$587.50**

Member Add On Price: \$587.50 add on price - 5% member discount = **\$558.13**

Price ⓘ	<input type="text" value="\$ 712.50"/>
Member Price ⓘ	<input type="text" value="\$ 641.25"/>
Add On Price ⓘ	<input type="text" value="\$ 587.50"/>
Member Add On Price ⓘ	<input type="text" value="\$ 558.13"/>

Using multiple billable rates

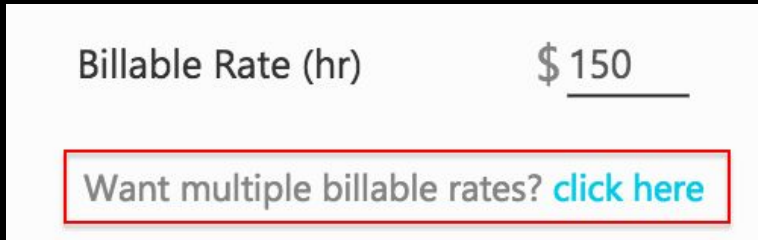
When you use the Price Setup Wizard, you will see an option to enter multiple billable rates for **Billable Rate (hr)**. Keep in mind that with multiple billable rates, the **Billable Rate (hr)** will be determined by sold hours.

Note:

→ This feature is automatically available with the *Price Setup Wizard*.

To enter multiple billable rates:

1. Follow instructions for *How to Use the Price Setup Wizard* up until Step Two, when you are ready to enter pricing criteria.
2. Instead of entering a rate in **Billable Rate (hr)**, click where you see *Want multiple billable rates?*



Billable Rate (hr) \$ 150

Want multiple billable rates? [click here](#)

3. When you click *Want multiple billable rates?* the *Multiple Billable Rates* window appears.



← MULTIPLE BILLABLE RATES

0.00 hrs. to 0.00 hrs.

= \$ 0.00 billable rate

[Add Billable Rate](#)

Quick Reference Guide

4. Enter a sold hours range and billable rate (to be applied to items within the sold hours range).

← MULTIPLE BILLABLE RATES

0.00	hrs. to	2.00	hrs.	
= \$ 200.00				billable rate



Add Billable Rate


5. To add another billable rate, click **Add Billable Rate**. Note: The next sold hour range will automatically begin where the previous one ends.
 - a. Note: If items in your Pricebook have sold hours below your lowest sold hour range, or sold hours above your highest sold hour range, the Price Setup Wizard will not change pricing for these items.
 - b. Note: To delete a sold hours range, click the **Delete** (trash can) icon (you will be asked to confirm).

← MULTIPLE BILLABLE RATES

0.00	hrs. to	2.00	hrs.	
= \$ 200.00				billable rate



2.00	hrs. to	0.00	hrs.	
= \$ 0.00				billable rate

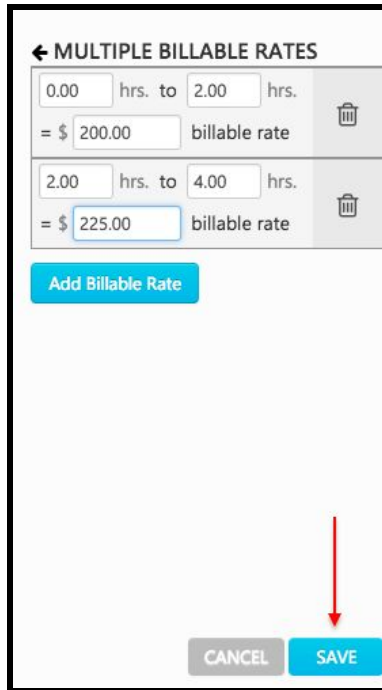


Add Billable Rate



The next sold hours range will automatically begin where the previous one ends.

Quick Reference Guide

6. When you are satisfied with your billable rates, make sure to click **Save** at the bottom of the *Multiple Billable Rates* window.



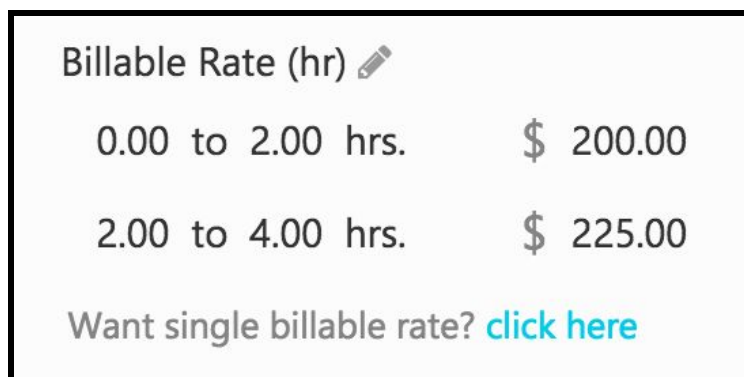
← MULTIPLE BILLABLE RATES


0.00 hrs. to 2.00 hrs.	= \$ 200.00 billable rate	
2.00 hrs. to 4.00 hrs.	= \$ 225.00 billable rate	

[Add Billable Rate](#)

[CANCEL](#) [SAVE](#)

7. You will return to the Price Setup Wizard screen. Under **Billable Rate (hr)** you will see the billable rates you have configured.
 - a. If you wish to edit your billable rates, click the **Edit Pencil**.
 - b. If you want to re-instate a single billable rate, click where you see *Want single billable rate?*



Billable Rate (hr) 

0.00 to 2.00 hrs.	\$ 200.00
2.00 to 4.00 hrs.	\$ 225.00

Want single billable rate? [click here](#)

8. Once you are done setting your billable rates, proceed to run the *Price Setup Wizard*.

Configure your account to control how the member discount is applied

Your account can be configured so you control whether the **member discount** is applied to labor only, labor and materials only, or to the full item price (labor, materials, and the surcharge).

Note:

- This feature is not automatically available with the *Price Setup Wizard*. Contact your Implementation Specialist or Success Manager to turn this on for your account.

To control how the member discount will be applied:

1. Follow instructions for *How to Use the Price Setup Wizard* up until Step Two, when you are ready to enter pricing criteria.
2. Underneath the *Member Discount*, you will have three different options. Select how you would like the member discount to be applied (more info is available below).

Member Discount 10 %

☐ Apply after labor, material and surcharge

☐ Apply to labor only

☒ Apply to labor and material before the surcharge

Member discount options	Where the discount is applied	How the member discount will be calculated
<i>Apply after labor, material, and surcharge</i>	The member discount will be applied to the full item price, including labor (billable hours), materials, and the surcharge.	$[(\text{Sold hours} \times \text{Billable Rate per hour}) + [\text{Material Costs} + \text{Surcharge}]]$ $\times [\text{Member discount \%}]$

Quick Reference Guide

<i>Apply to labor only</i>	The member discount will be applied to labor (billable hours) only.	[Sold hours x Billable Rate per hour] x [Member discount %].
<i>Apply to labor and material before the surcharge</i>	The member discount will be applied to labor (billable hours) and materials only (not to the surcharge).	[[Sold hours x Billable Rate per hour] + [Material Costs]] x [Member discount %].

3. Once you are done setting the member discount, proceed to run the *Price Setup Wizard*.

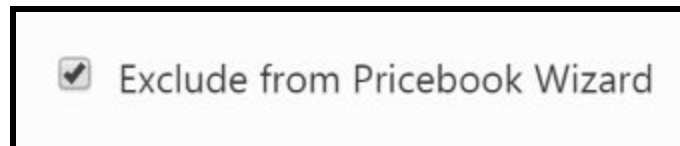
How to exclude Pricebook items from the *Price Setup Wizard*

You can go into your Pricebook to exclude items from the *Price Setup Wizard*. When you exclude a Pricebook item, the *Price Setup Wizard* will not change pricing for that item even if you have selected that item's category.

- Note: You may exclude any kind of Pricebook item from the *Price Setup Wizard*, including services, equipment, or materials.
- Note: This feature is automatically available with the *Price Setup Wizard*.

To exclude a Pricebook item from the *Price Setup Wizard*:

1. Navigate to Settings > Pricebook.
2. Click the services, equipment, or materials tab. Then, click into the service, equipment, or material item you would like to exclude.
3. Check **Exclude from Pricebook Wizard**, located under the *Details* tab.



4. When you are done, click **Save**.

Individual vs. aggregate material mark-ups

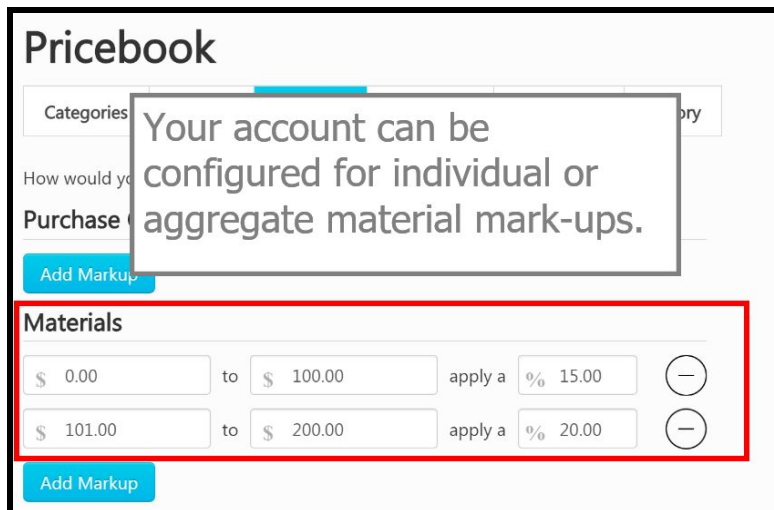
When your account is configured for the material mark-up table, you will have the option to select individual or aggregate mark-ups. Note: Once the mark-up table is configured for your account, you cannot change the individual / aggregate setting (but you can always contact your Implementation Specialist or Success Manager if you want to change your mark-up table setting).

What is an individual material mark-up?

If your account is configured for individual material mark-ups, material mark-up rates will be applied at the individual item level.

What is an aggregate material mark-up?

If your account is configured for aggregate material mark-ups, the sum of material costs will determine the material mark-up rate.



The screenshot shows the 'Pricebook' interface with the 'Materials' tab selected. A red box highlights the 'Materials' section, which contains two rows of mark-up settings. Each row has input fields for a price range (from 'to') and a percentage mark-up rate, followed by an 'Add Markup' button. A semi-transparent text box is overlaid on the top part of the screenshot.

Materials			
\$ 0.00	to \$ 100.00	apply a % 15.00	⊖
\$ 101.00	to \$ 200.00	apply a % 20.00	⊖

How to set up the material mark-up table

The material mark-up table is located in the *Materials* tab of the Pricebook (Settings > Pricebook > Materials tab). Note: If you don't see the mark-up table, contact your Implementation Specialist or Success Manager to configure your account.

- ❖ **Important:** When you enter new mark-ups, these mark-ups will *not* be instantly applied (you must run the Price Setup Wizard to apply the mark-up).

- ❖ More information is available in the *Material Mark-Up Table* how-to article in ServiceTitan Help.

Sample Calculation “A” (Price Setup Wizard) - Individual material mark-ups

Let's assume following information has been pulled from your Pricebook:

Service 001 sold hours: 2 sold hours

Cost of Material A: \$50

Cost of Material B: \$150

Material Mark-Up Table:

- 15% mark-up on material costs between \$0 to \$100
- 20% mark-up on material costs between \$101 to \$200.

Let's assume the following information is entered in the *Price Setup Wizard*:

Billable rate (hr): \$100

Surcharge: \$0

This would be the *Price of Service 001* with individual material mark-ups:

[2 sold hours x \$100 billable rate per hour]

+

\$0 surcharge

+

[\$50 cost of Material A + [15% individual item mark-up]

+

[\$150 cost of Material B + [20% individual item mark-up]

= \$437.50

The *Price of Service 001* would be **\$437.50**.

- Note: The same mark-ups would be applied to the *Member Price*, *Add On Price*, and *Member Add On Price*.

Sample Calculation “B” (Price Setup Wizard) - Aggregate material mark-ups

Let's assume the following information has been pulled from your Pricebook:

Service 001 sold hours: 2 sold hours

Cost of Material A: \$50

Cost of Material B: \$150

Material Mark-Up Table:

- 15% mark-up on material costs between \$0 to \$100
- 20% mark-up on material costs between \$101 to \$200.

Let's assume the following information is entered in the *Price Setup Wizard*:

Billable rate (hr): \$100

Surcharge: \$0

This is the *Price of Service 001* with an aggregate material mark-up:

[2 sold hours x \$100 billable rate per hour]

+

\$0 surcharge

+

[\$50 cost of Material A + \$150 cost of Material B] + [20% aggregate mark-up]

= \$440

The *Price of Service 001* would be **\$440.00**.

→ Note: The same mark-ups would be applied to *Member Price*, *Add On Price*, and *Member Add On Price*.

How to access your Pricebook history (or reinstate a previous version of your Pricebook)

You can use the *History* tab to access your Pricebook history, and download any previous version of your Pricebook in Excel format. To reinstate a previous version of your Pricebook, you can go to Settings > Import / Export data to re-upload it to ServiceTitan.

1. Navigate to Settings > Pricebook > History tab.
2. The *Date* column tells you when the Pricebook was updated, and the *User* column tells you which ServiceTitan user made the change.

DATE	USER	PRIMARY		ADD ON		SOURCE	BEFORE	AFTER
		HR RT	SUR.	HR RT	SUR.			
3/18/2016 11:18 AM		N/A	N/A	N/A	N/A	Import	.XLS	.XLS
3/18/2016 10:53 AM		\$400	\$0	\$350	\$0	Wizard	.XLS	.XLS

3. You will see the following data in the *Primary* and *Add On* columns:
 - a. **HR RT** - The Billable Rate (hr) entered when the Pricebook update was made.
 - b. **SUR** - The Surcharge amount entered when the Pricebook update was made.
 - c. Note: If this was a newly imported Pricebook, you will see "N/A" in the the *Primary* and *Add On* columns.
4. The *Source* column tells you how the Pricebook updates were made.
 - a. Import - A new Pricebook was imported.
 - b. Wizard - Pricing changes were made using *Price Setup Wizard*.
5. The *Before* column contains the previous version of your Pricebook, before the Pricebook update was made.
6. The *After* column contains the newer version of your Pricebook, after the Pricebook update was made.
7. If desired, you can download any version of your Pricebook in Excel format by clicking the **.XLS** link.
 - a. Note: To **reinstate a previous version of your Pricebook**, download the desired version, then go to Settings > Import / Export Data to upload to ServiceTitan.