## Sales Builder Pro Pricebook
## After Launch Checklist

I love a checklist to complete a project. Use this checklist to methodically customize the app to meet the needs of your company.

☐ Equipment
- Export the worksheet.
- Highlight Model Display Name changes you would like to have made.
- Indicate items that you want to remove from your price book.
- Add additional series/models if needed
- Submit the document to Document Portal. (Management Portal >Documents)

☐ Accessories
- Export the worksheet
- Highlight Model Display Name changes you would like to have made.
- Indicate items that you want to remove from your price book.
- Add additional models if needed
- Submit the document to Document Portal  – CSS will import the update sheet.
- Note: The manage button allows you to make changes to the items that display in the app and allows you to add additional items as needed. Changes made with the manage button go live immediately.

☐ Add-Ons/Services
- Export the worksheet
- Highlight Model Display Name changes you would like to have made.
- Indicate items that you want to remove from your price book.
- Add additional services if needed
- Submit the document to Document Portal – CSS will import the update sheet.

- Note: The manage button allows you to make changes to the items that display in the app and allows you to add additional items as needed. Changes made with the manage button go live immediately.

## Pricing

☐ Set tax rate

☐ Set Desired Margin

Cost

☐ Install Kits: Set standard install kit $ amount for each equipment type in your price book.

☐ Manage Kits Button (Install Manager Pro option if purchased)

- Each equipment type in your price book has an install kit. Accessories and Add-Ons do not have an install kits.
- Each equipment type contains Categories. Categories can be optional, recommended or mandatory.
- Categories contain kit items
- If you have a lot of changes to make Export Kit items worksheet. Indicate items that you would like to have removed
- Submit the document to Document Portal – CSS will import the update sheet.
- Manage Install Kits allows you to make changes that go live automatically. You can add additional items and change what is currently loaded.

☐ Labor: Set standard labor $/hr and number of hrs.  for each equipment type.

☐ Labor Options Button (Install Manager Pro option if purchased)
- Labor options are commonly used to adjust the amount of time applied to a piece of equipment based on the difficulty of the job. i.e. Crawl Space, Attic, etc.
- Install Button in the App displays the standard labor amount. Sales can select a different labor option while building the quote.
- Labor options are built out for equipment only. If you need labor and labor options for accessories or add-ons, a business rule would need to be added for the equipment type.

☐ Pricing Adjustments:
- Commonly used for commissions. Commissions are applied after the Margin is applied to cost of equipment, Install kits and Labor.
- Pricing adjustments only apply to items where the price is **calculated** using the business rules.

☐ Overall Job Costs:
- This section is commonly used for items that apply to the entire Option when selected. (i.e. permits, extra labor, duct testing). Margins and labor are set to each line item in this section.

☐ Financing:
- Your CSS can load your most commonly used programs.
- Provide a list that includes the plan name, term, payment factor, and dealer fee.
- Submit the document to Document Portal.
- Note: The manage button allows you to load your own program details, sort the order in which they display on your app, or deactivate old programs.

☐ Forms:
- Check with install team
- Decide if PDF sections and questions should hidden if blank