About Parts

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Overview

Simply put, parts are the different pieces of an appointment. They are what make up the different items or processes that may be involved in a given service. For each appointment, these are what will show up as the individual lines of an invoice. Every company chooses how to define and use these differently, so we've given parts enough flexibility to fit your definition.

Video Tutorial

Watch a video on creating Parts and Templates

Settings and Navigation

You find the parts and add-ons list in **Control Panel > Parts/Add-Ons**.



Parts/Add-Ons Manage parts/add-ons, templates and solutions for proposals and appointments.

Go to Control Panel > Proposals to find some additional settings for Parts.



<u>Proposals</u> Configure proposal behaviors.

For instance, this is where you can increase the length of descriptions shown for parts and services on your invoices. Enabling **Long Line Descriptions** will increase the character maximum to 2048.

	Settings
Set Proposal Owner on Accept	The default proposal owner is whoever created the proposal. Enable this to overwrite that owner with the user who accepts the proposal
Job Numbers?	C Track Job Numbers?
Options Default	Options selected by default
Options Required	All Options required by default
Long Line Descriptions	CAllow line descriptions up to 2048 characters. This may cause long descriptions to be truncated when synchronizing invoices with other systems.
Extra Signature	Allow for an extra signature to be taken on proposals
Deposits Before Acceptance	C Allow deposits when proposal is not yet accepted
Dio It Nour	Constant Provide New Assistance and

Only Users with the correct level of permissions can access these areas of serviceminder. To manage User settings go to **Control Panel > Users > Edit** and grant/deny **Permissions**.

Parts Grid

The **Parts Grid** page shows you all parts in list format. You can filter by**All** or just your **Active** parts (meaning that Inactive parts will not show in this view).

You can also **Search** or **Download** (look for the download arrow icon next to Actions) and **Upload** a list of parts if you choose to make bulk changes.

Parts and Add	-ons					All	Active	Sec	Upload Po	arts 🛓	Ac	tions v	Parts
Page 1 of 1 (6 items)	(1)	\bigcirc											
Add	Category	^ 9	Subcategory 1	٩	Subcategory 2	٩	Name	٩	Description 9	Unit Price	Ŷ	Max Price	9 Unit
Edit Delete							Ghost	<u>Re</u>	5 year warra	0	.00		
Edit Delete							2. Garl	ic	For vampires	50	.00		
Edit Delete							Honey	<u></u>	for honeyba	85	.00		
Edit Delete							1. Disgu	<u>uise</u>	required for	25	.00		
Edit Delete								<u>ne</u>	We don't use	0	.00		
Edit Delete	Werewolves		Big				Bear Tr	ap	For larger lu	0	.00		

Actions Button

There are two options when you click on Actions.

- 1. Clean Up this will allow you to disable or delete your unused parts. This includes all parts that are not used in any invoices or proposals.
- 2. **Update** this is a Bulk update option, so you can quickly adjust price based on a \$ or % amount. You can also bulk update all parts to be taxable, internal, or active/inactive.

Disable Unused Parts

This will disable or delete your unused parts. This includes all parts that are not used in any invoices or proposals.

All	Name	Description
	Old Honeybadger trap	We don't use this one anymore.

Bulk Update Parts	
Price	O Percentage %
	Increase or decrease pricing by a percentage
	O Amount
	Increase or decrease pricing by fixed amount
Active	No change Make Active Make Inactive
Taxable	● No change 🔿 Make Taxable 🔿 Make Non-taxable
Internal	No change O Make Internal O Make Not Internal

Parts Details Page

Clicking on THE NAME of the part will take you to the Parts Details page.

You will find basic settings, most of which are optional. All a part needs to exist is a name, description, and unit price. Finally, a part must also be active for it to be usable.



Making a part **Inactive** will not invalidate any previous appointments or invoices, but it will prevent you from using it again until it's been re-activated.

Part/Add-On Be	ar Trap Edit Delete Usage 🕹	Additional Details
Name	Bear Trap	Collateral Assets
Active	Yes	
Description	For larger lupins in the field.	■ <u>Collateral Library</u> × <u>Remove All</u>
Color		
Part Category	Werewolves	
Part Subcategory 1	Big	
Taxable	No	

Clicking on Usage at the top will download a .csv report of where that part is used.

On the right you can find any invoices or appointments that this part is currently used on. This is useful to see how well a part is doing or to find individual occasions where you've installed a part.

While there are only a few fields of information that are truly required, we recommend learning how to properly use the remaining fields below to effectively schedule appointments with the correct parts. You can bulk update a parts active status and taxable status on the Parts grid.

Download and Upload Parts

Dowloading parts is a simple click of a button. If you edit that spreadsheet and reupload, you will most likely have no difficulties since it is already formatted for our system.

However, if you have your own spreadsheet and you try to upload, there are some things you should take into consideration. Please read the following advisory notes:

The service **minder** system will ONLY accept **.CSV** files if you are uploading new parts. If you have only renamed the file and not actually saved it properly, you will get an error.

If there are blank rows or columns in the spreadsheet, you will receive an error. If the column data headers do not match something within our system, you will receive an error.

If you do receive errors, just adjust the spreadsheet accordingly and try to re-upload. The system will give you a success message if it has gone through correctly.

If you are still experiencing issues, email support@serviceminder.zendesk.com and attach the spreadsheet that you want to upload.

Pricing Bands

With range-based pricing turned on, you'll be able to start making use of pricing bands. Pricing bands will allow you to set specific quantity-based prices for your parts. You could, for example, set a part to cost the same no matter what as long as its quantity is in between 5 and 10. Outside of that range, the price will calculate normally. Any quantity on an appointment or invoice that falls within the range of a pricing band will have its price fixed based on the pricing band it falls into.

Pricing Bands

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<u>Add</u>	At Least	Less Than	Price	Formula	Duration
Edit Delete	0	1000	\$80.00		110
Edit Delete	1001	1500	\$90.00		120
Edit Delete	1501	2000	\$97.00		128
Edit Delete	2001	2500	\$104.00		134
Edit Delete	2501	3000	\$142.00		155

If you attempt to adjust pricing for parts but nothing happens, chances are your parts have a pricing band on them and you need to edit them in the section shown above. Click Edit next to the part name, and scroll till you see the section showing Pricing Bands.

For more details, go to Pricing Bands.

Hide Part Pricing

There are two ways to do this:

1. Set it at the Part level (Control Panel > Parts and Add-Ons). Check the Internal box so that the pricing does not show on the Customer View. The pricing will fall under the Service as a whole as a Total, rather than part-by-part cost.

If the part belongs to a template and you make a change, be sure to check the box at the very bottom of the screen to update all templates associated with that part. Otherwise, it will not be consistent across all proposals and invoices.

IAGUIA-	Ghost Repellant - 5 Year
Active	
Description*	5 year warranty on ghost repellant
Color	× *
Category	Select one T
Self Service	
Internal	
Taxable	
Asset Tracking	None V
Branding Revenue Category	None 🔻
Income Account	
	Income account name for syncing to QuickBooks
Duration	0 mins
	Optional per unit time estimate when scheduling this item
Duration Quantity	
	Optional quantity for duration measurement
Override Quantity From	None V
Sync Oty with Service Oty	
Service Availability	
Service Availability	
Required For Service	
Exclude from Carry Forward	

2: Set it at the Proposal level, so that each proposal (**Control Panel > Proposal**) and turn on the **Hide Unit Price** option. Again, the Service will show a **Total** cost. You can even **Hide Parts** completely from proposals and invoices.

	For multi-day scheduling, the default appointment duration
Presentation	
Show Total Below Date	Show the proposal's total just below the date
Show Owner Info	Show proposal owner's name and email
Service Line	Always hide unless non-zero
Summarize Pricing	Summarize pricing at service and option levels
Blank Zero Amounts	Blank out any zero amounts
Hide Quantity	Hide the Quantity column on proposals and invoices
Hide Unit Price	Hide the Unit Price column on proposals and invoices
Hide Parts	Hide the Parts column on proposals and invoices
Redirect to Invoice	If disabled, will no longer redirect to invoice when a customer accepts their proposal online
Move Tax to Terms Section	Display the proposal's tax information inside the proposal's terms section. Only affects online proposal views
Notes Label	
	Specify an alternate label to use for the NOTES field on proposals and invoices
Terms and Conditions	Below Signature V

If you turn the parts on as internal and keep the box unchecked at the proposal level, everything will stay hidden. The Part-level setting overrides the Proposal-level setting.

FAQs

Is there a way to set a minimum number in the quantity?

The only way currently to set a minimum for a part is to add it to build a proposal template with that part.

Say we charge \$100 an hour and an additional \$50 per half hour after the first hour. If a client's job takes 1.5 hours, we would charge 100 + 50 = 150. If the job is 2 hours, we would charge 100 + 50 = 100 + 50 (x2) = \$200. How do we build this into service minder?

Edit your **Service** to just have a **Base Price** of \$100 and **Duration** set to 1 hour.

Then, you can create a "30-min overage" Part and have a Base Price of \$0 and Duration of 30 min.

Whenever finishing the appointment, add that part as a line item. Your quantity for that overage part will be the number of 30 min blocks past the estimated time to finish. If it took 2 hours, then you would add a quantity of 2 to the "30-min overage" part.

Troubleshooting

I use custom fields to override quantity in proposals for parts. It stopped calculating properly, what do I adjust?

There was a recent update to the system that means if you previously had 0 in the quantity field in proposal, the custom fields no longer adjusted.

You need to edit the templates so that the quantity field is empty (meaning no 0 just blank). Then custom fields can override like normal.

I tried to delete parts, but they are still showing up? Does it take a while to implement these changes?

No, if you delete or edit a part the changes should be saved immediately. What may be happening is if those parts are used on a Proposal/Invoice, then they cannot be deleted. Because there is data now attached to that part (meaning it is tied to Contacts, Appointments, maybe even EoM reporting) then we recommend making that part Inactive.



Inactive parts cannot be used on newly created proposals and they are hidden from the list if you are on the "Active" view of your Parts Grid.

