

Part Settings

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Overview

You can either **Add** a new part or **Edit** an existing part. You will see the part settings page. **Parts** build **Proposals** and they are included under **Services**.



Parts are the building blocks and override settings at the **Service** level.

Creating or Editing A Part

Here is the first part of creating or editing a part. Let's start by taking a look at some of the not-so-obvious fields:

- **Taxable** - Any part that is taxable will have tax calculated anywhere that tax ought to apply. This is entirely based on whether or not you charge tax for your parts.
- **Category** - This is a way to help you get organized. If you don't already categorize your parts, we recommend starting now. It's a great organizational skill to have! Categorizing your parts will make it easier to find and use them in the future, as well as make it easier to determine how well your parts are doing financially in serviceminder's reports section. You can create part categories, sub part categories, and sub-sub categories from the same page that you create/edit parts.
- **Duration** - Sometimes you've used an item so much, you just know how long it's going to take to install it. You can insert an amount of time in either minutes or hours to help you manage your day and to better plan your appointments.
- **Duration Quantity** - After you've set a duration, you can set an optional quantity here to determine how many of this part you're able to install within the set duration above.
- **Income Account** - This field is only used if you're planning on making use of QuickBooks. To learn more on syncing with QuickBooks, [click here](#).
- **Text Color** - Setting this color will override the color set for a service. If you have an appointment scheduled which has a service colored blue, you would normally see blue text for that appointment on the calendar. However, if that appointment contains a part with a color set, such as red, that blue color will then be overwritten with red. If multiple parts have different colors on an appointment, the first part's color will be used. You can check 'Reset to default?' to remove the set color from a part upon saving. This will effectively clear whatever color is set and will no longer override any service colors.

- **Background Color** - Functions the same as the part's text color. The only difference is that this affects the background behind the label text of an appointment on the calendar.
- **Service Availability** - By default, a part can be used with any service. To make it easier to find certain parts in the future, you can choose which services are allowed to schedule certain parts.
- **Required for Service** - When enabled, this option ensures that all services that a part has been made available to are automatically populated with a line item for the part.
- **Exclude from Carry Forward** - Appointments that make use of the carry forward feature will take all of their parts with them to the new appointment. It will, however, ignore any parts that have this option enabled.
- **Exclude from Minimum** - If a service has a minimum charge set, parts that are set to be excluded from the minimum will be spared from being calculated into the minimum charge.
- **Reorder Point** - The reorder point is the quantity of a part that signifies when you ought to order a new shipment. This only applies to service agents with inventory tracking turned on, or if you have inventory tracking turned on at the organization level. An email will be sent reminding you that you're getting low.
- **Unit Cost** - Denotes how much an item costs per unit to resupply

Assemblies

- **Assemblies** - Assembly parts are parts that are intended to be included as part of a package. Checking this box will allow you to search for other parts to include in the assembly. You may also choose to zero out the prices of the included parts and instead use the unit price marked on the assembly

Service Reminder Overrides

- **Reminder Interval** - can set the reminder interval on a part to override the same interval on a parent service. If you've scheduled an appointment with a service reminder interval of 1 year, but it also contains a part with a reminder interval of 6 months, the service's reminder interval will be overwritten for that particular appointment. After 6 months have passed from that initial appointment, the customer will be reminded that they ought to schedule another appointment
- **Optional Service** - part with an optional service set will have the reminder service scheduled as whatever is selected here. For example, an installation service containing this part could be set to send a reminder to

schedule a maintenance service instead of another installation

Pricing

- **Unit of Measure** - default, parts will be listed per unit. You can choose to set an optional unit of measure such as feet, meters, gallons, etc
- **Unit Price** - You are given two values to set the price of each part. The lower end is required, and is the default price per unit for a part. The upper range is optional and declares the maximum price of a part

Summarization

- **Display in Summary** - Checking this box will allow this part to be displayed in a contact's part summary section. Useful to help you see only the data that interests you
 - **Display Row & Column** - Parts displayed on a contact's part summary will be laid out on a table. Setting a row and column for a part will force a part to always show up on a specific row and column every time. Parts without this set will be laid out in order without getting in the way of parts that do have these options set
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