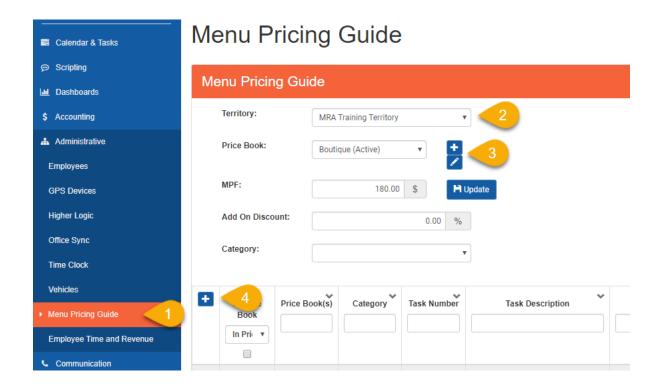
CREATING AN MPG TASK

- 1. Open Menu Pricing Guide from Administrative Menu Option.
- 2. Select the Territory, if there are multiple territories.
- 3. Select the Price Book in which the task should be added.
- 4. Click the '+' to create a new task.



5. Select the Category for the task.

- 6. The QB Account and Sales Category will default based on the category selected.
 - a. The QB Account defines the Income Account in QBO for the task amount.

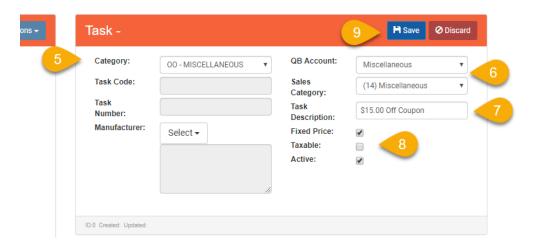
Profit and Loss June 2018 - May 2019				
	Jun 2018 - May 2019	% of Income		
ncome				
401 Washer		11.34%		
402 Dryer		10.20%		
403 Refrigerator/Freezer		27.83%		
404 Oven/Range		12.37%		
405 Ice Maker/Machine		2.17%		
406 Dishwasher		7.28%		

b. The Sales Category defines the Service Category on your WSA for the Task Amount.

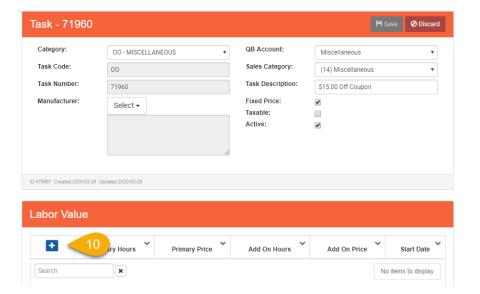
Sales by Service Category:

Service Category	Residential Sales	Commercial Sales	Total Sales
Miscellaneous	\$-85.00	\$0.00	\$-85.00
(1) Washer	\$396.56	\$0.00	\$396.56
(14) Miscellaneous	\$720.00	\$0.00	\$720.00
(2) Dryer	\$132.19	\$0.00	\$132.19
(3) Refrigerator/Freezer	\$865.40	\$0.00	\$865.40
(4) Oven/Range	\$475.88	\$0.00	\$475.88
(5) Ice Maker/Machine	\$264.38	\$0.00	\$264.38
(6) Dishwasher	\$264.38	\$0.00	\$264.38

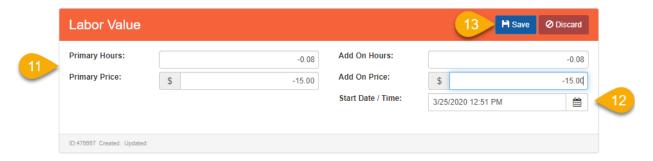
- 7. Enter the name of the task in the Task Description field.
- 8. Confirm that the appropriate boxes are checked for Fixed Price and Taxable.
 - a. If the Fixed Price box is checked, the price will always be the same. The tech cannot adjust it on the work order. If the task is selected as an Add-On, it will still stay the Fixed Price.
 - b. Coupon tasks should always be Fixed Price, with the Taxable box unchecked.
- 9. Save.



10. Click the '+' button on the Labor Value panel.



- 11. The Primary Hours default to 1. Add On Hours default to 0.75.
 - a. The Task Amount can be adjusted by either changing the hours OR entering an exact amount that should be charged for the task.
 - b. Be sure to tab out of the field you are changing in order to trigger the calculation of the associated field.
 - c. For Coupon Tasks, enter the amount of the coupon with a sign in front to indicate that it is a negative task amount.
- 12. The task can be set up to be implemented on a future date by selecting a Start Date and Time. It automatically defaults to the current date & time.
- 13. Click on Save.



Technicians will need to do an Office Sync to receive the new task on the iPad.

ADDING THE TASK TO MULTIPLE PRICE BOOKS

- 1. Select the Price Book to which the task should be added.
- 2. Select "Not in Price Book" in the In Price Book column.
- 3. Filter by Task Description to find the newly created task.
- 4. Check the box next to the task in the In Price Book column to add it to the selected Price Book.
- 5. Click on Save.
- 6. Repeat steps 1-5 for each Price Book the task should be added to.
- 7. We recommend adding coupons, freight, second man tasks, etc. to all books, so the technician doesn't have to change the Price Book on the iPad to add these tasks.

