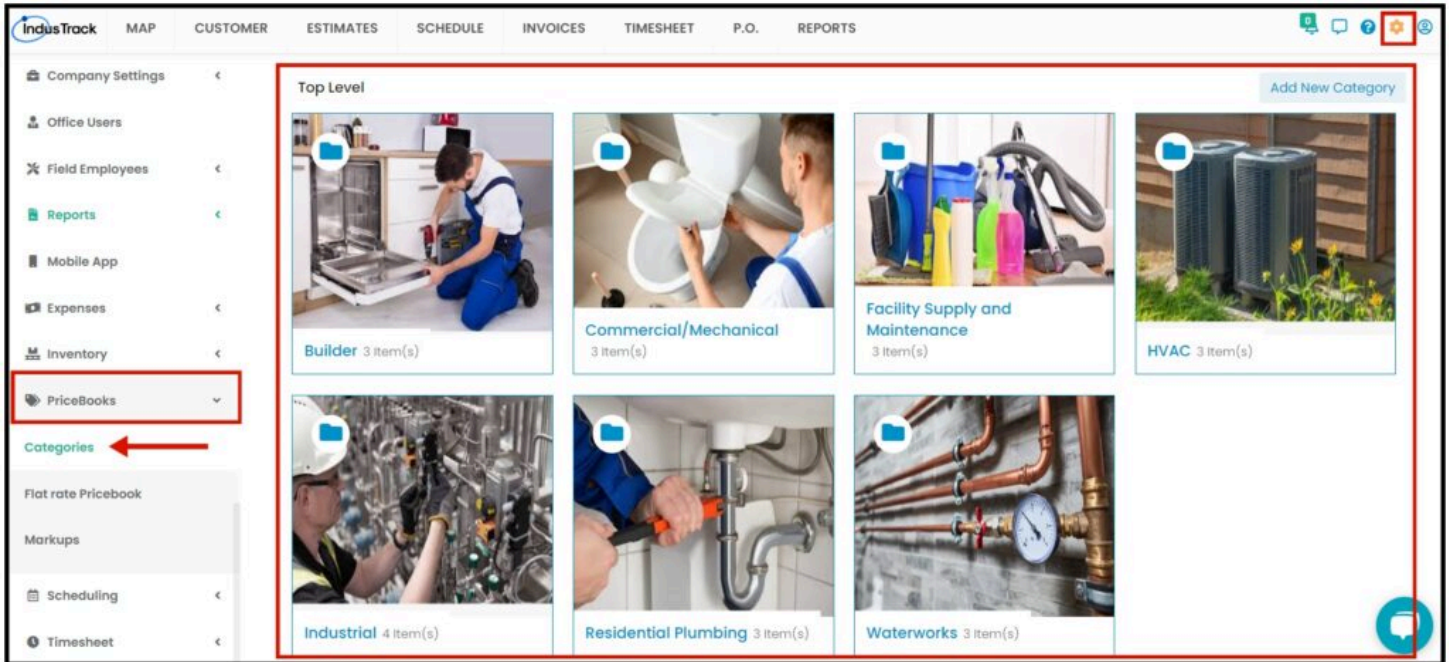


Pricebook Categories

PriceBooks items are grouped into categories. To access the categories page go to **Settings > PriceBooks > Categories**. This opens the **Top Level** of the PriceBook.

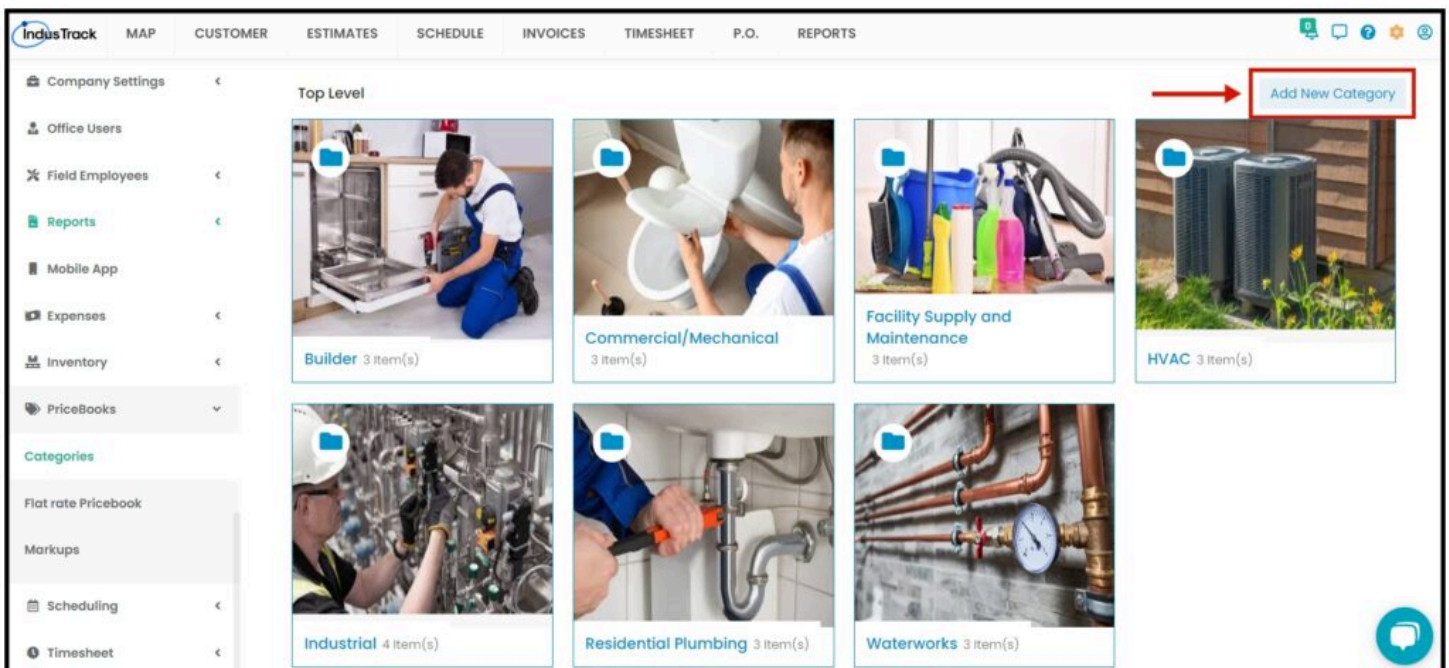
Category Top Level View

You will be able to see here in the Top-level all the main Pricebook Categories.



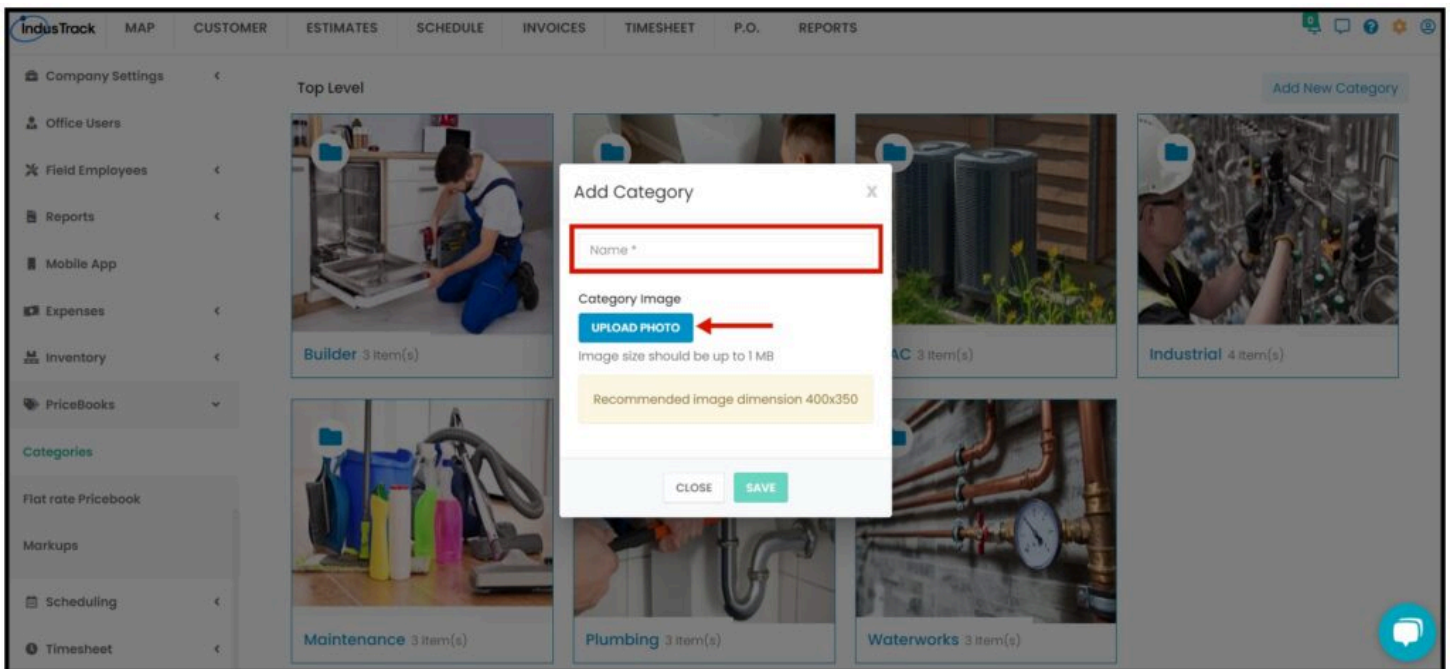
Create Pricebook Category

1. Click the **Add New Category** button at the upper right-hand corner to add/create a new category.

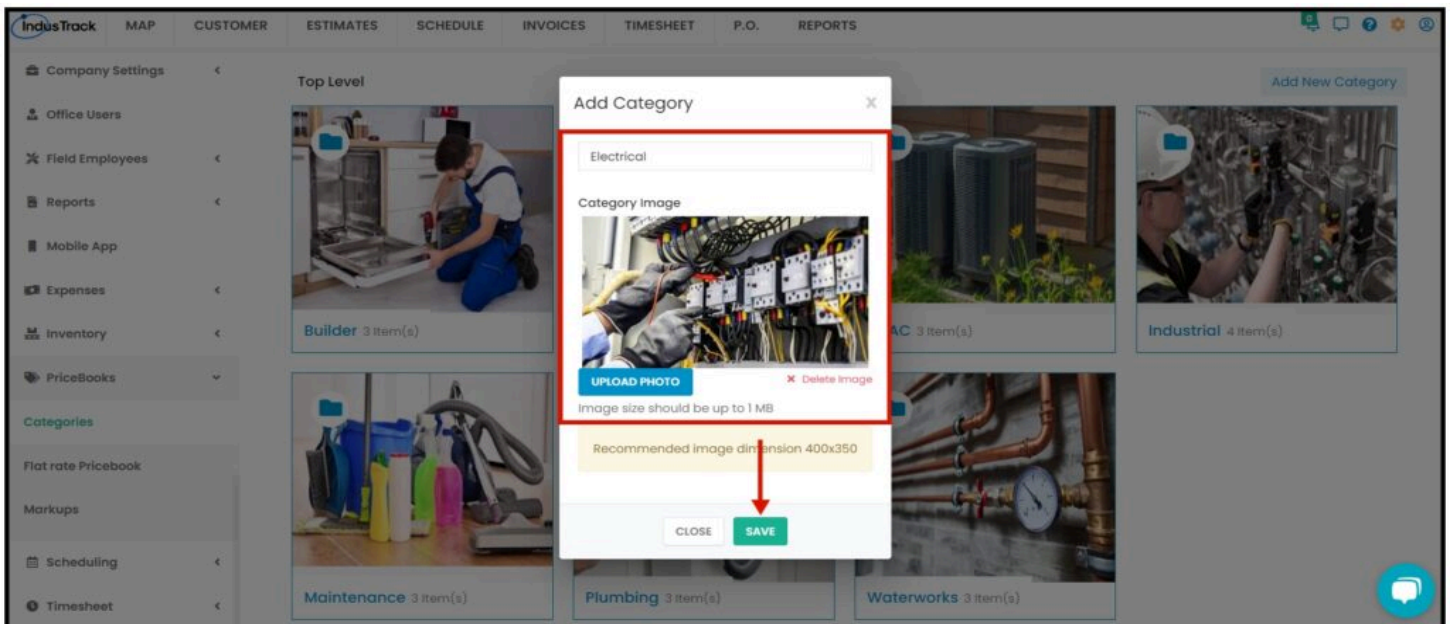


2. After clicking on Add new Category, an **Add Category** window will pop up. Give the category a name (**Note that category name is required**). You can also add a Category Image (**optional**).

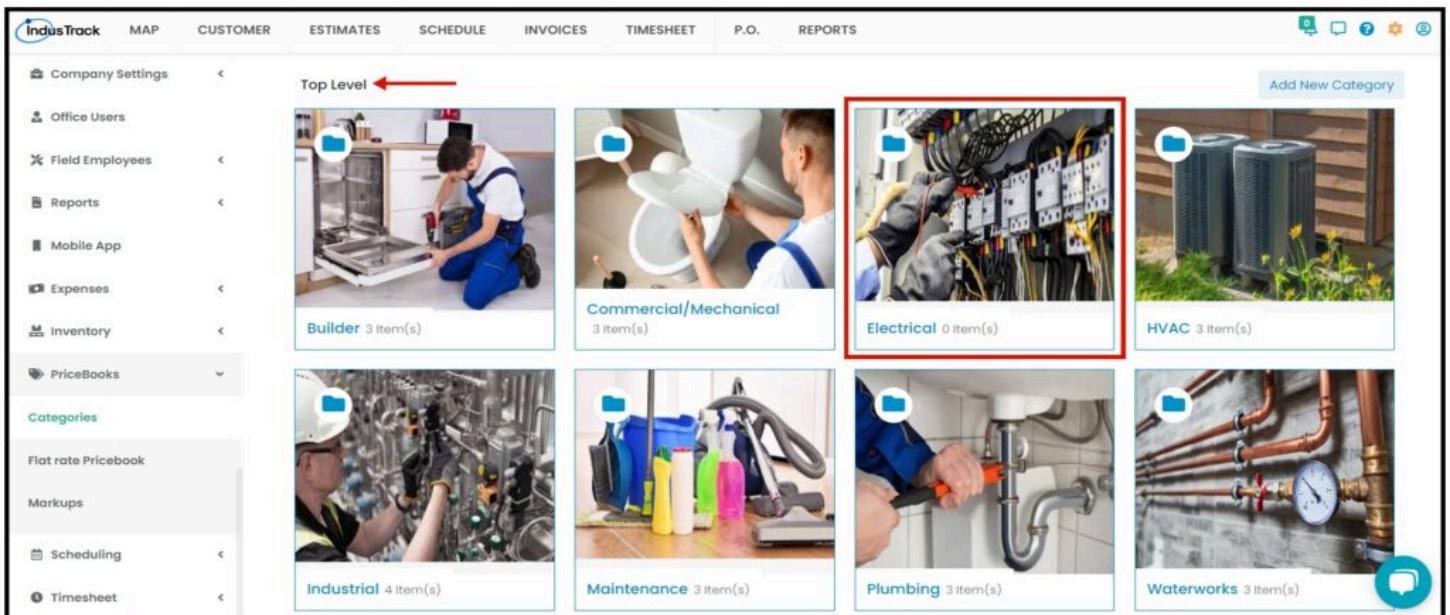
- Click on the **Upload Photo** button on the **Category Image** field.
- **Upload Photo from your computer file.**
- Image size should be up to 1mb only, with dimensions of 400×350 (recommended). The image will not upload if it is bigger than 1MB.



3. Now that we gave the category a Name and uploaded a Photo, **Click SAVE**

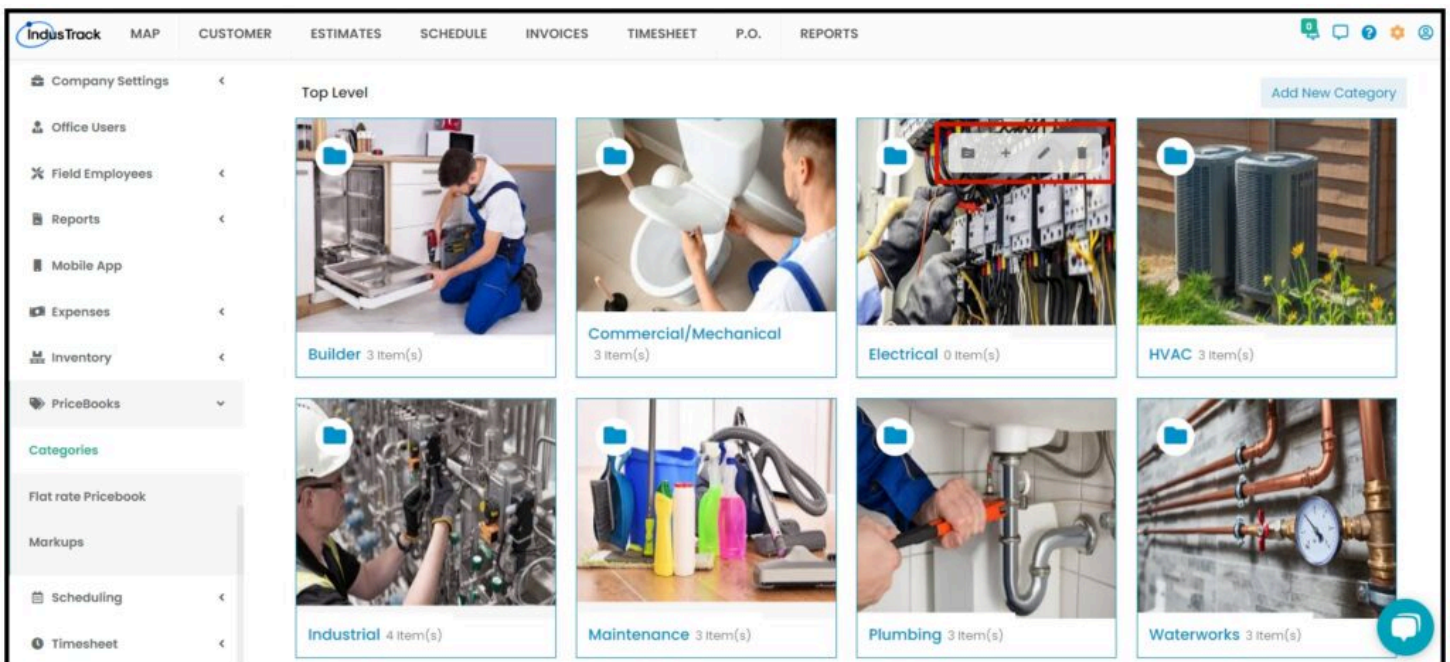


4. After saving the main category we created, you can see that it has been added to the list of categories that are located in the **Top Level** of the PriceBook. You will be able to see **all Main Categories at the Top Level**.

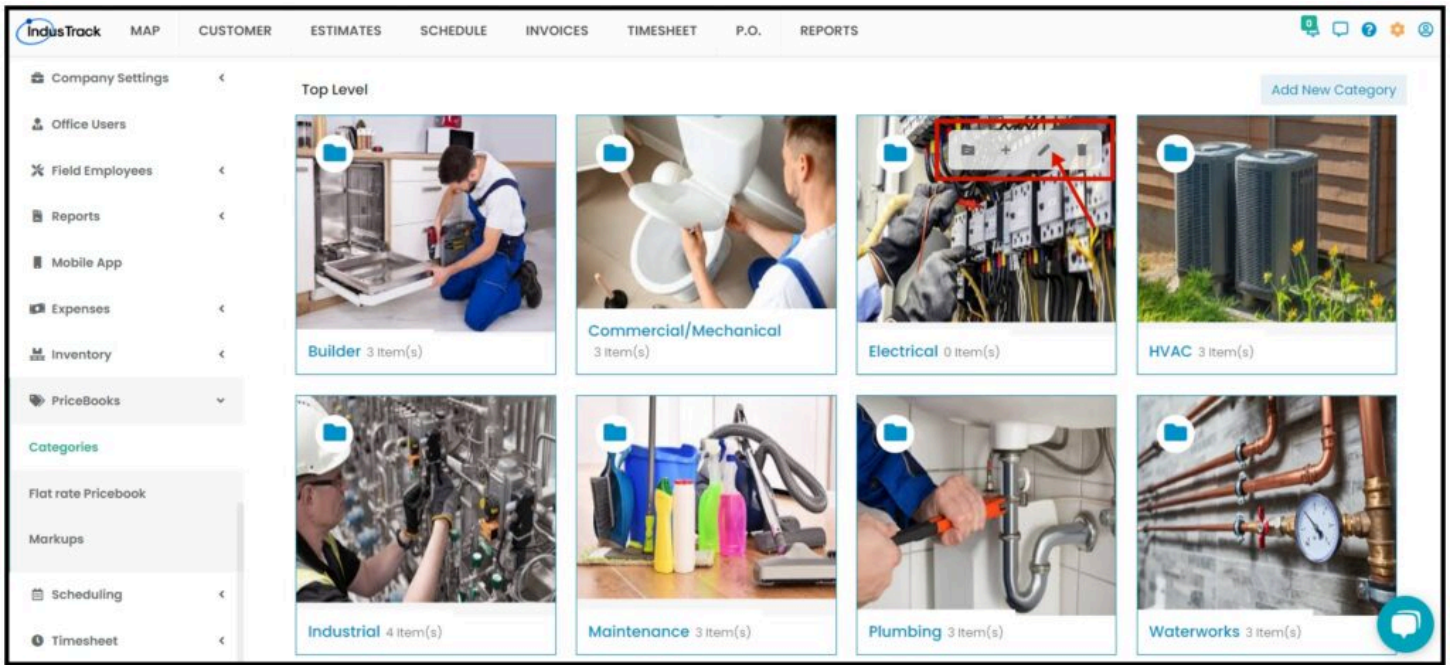


Edit or Delete a Category

Hover your mouse over the main Category box. You will see **four different icons**.

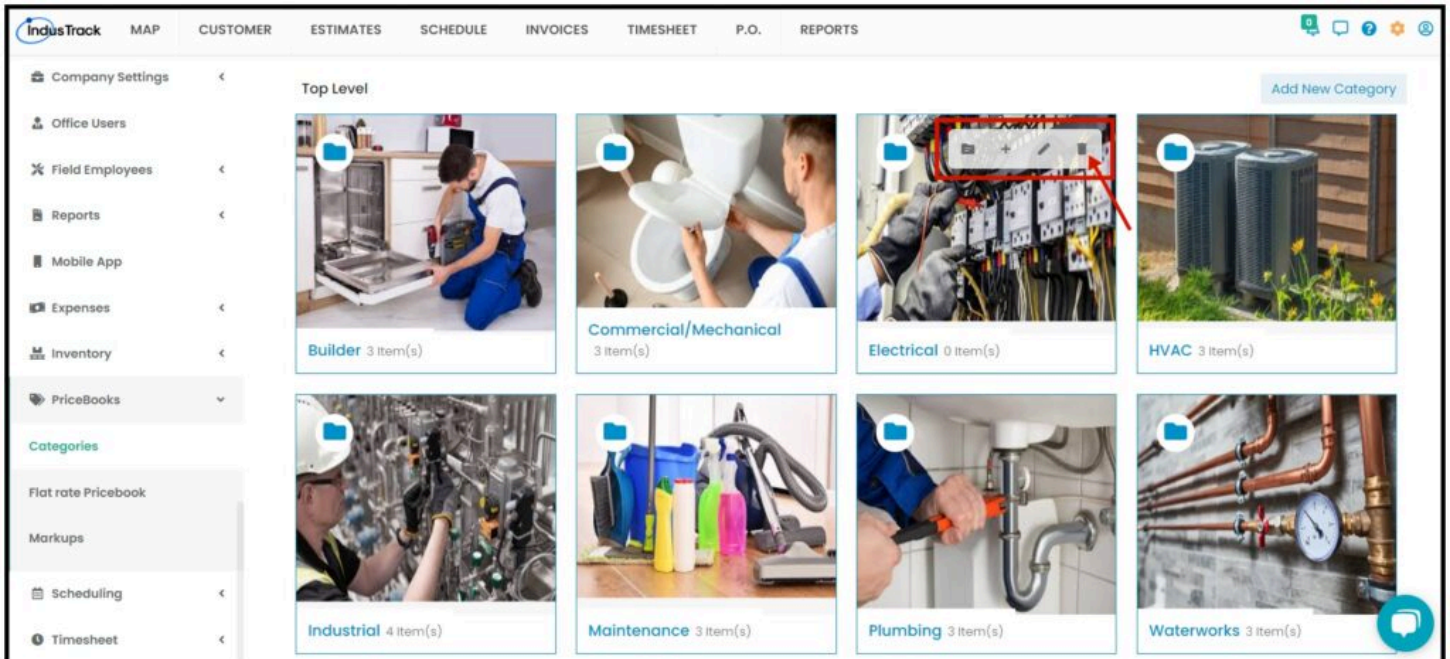


1. **To Edit the Category, click on the Pencil Icon.** It will allow you to edit the Category Name and Category Photo.

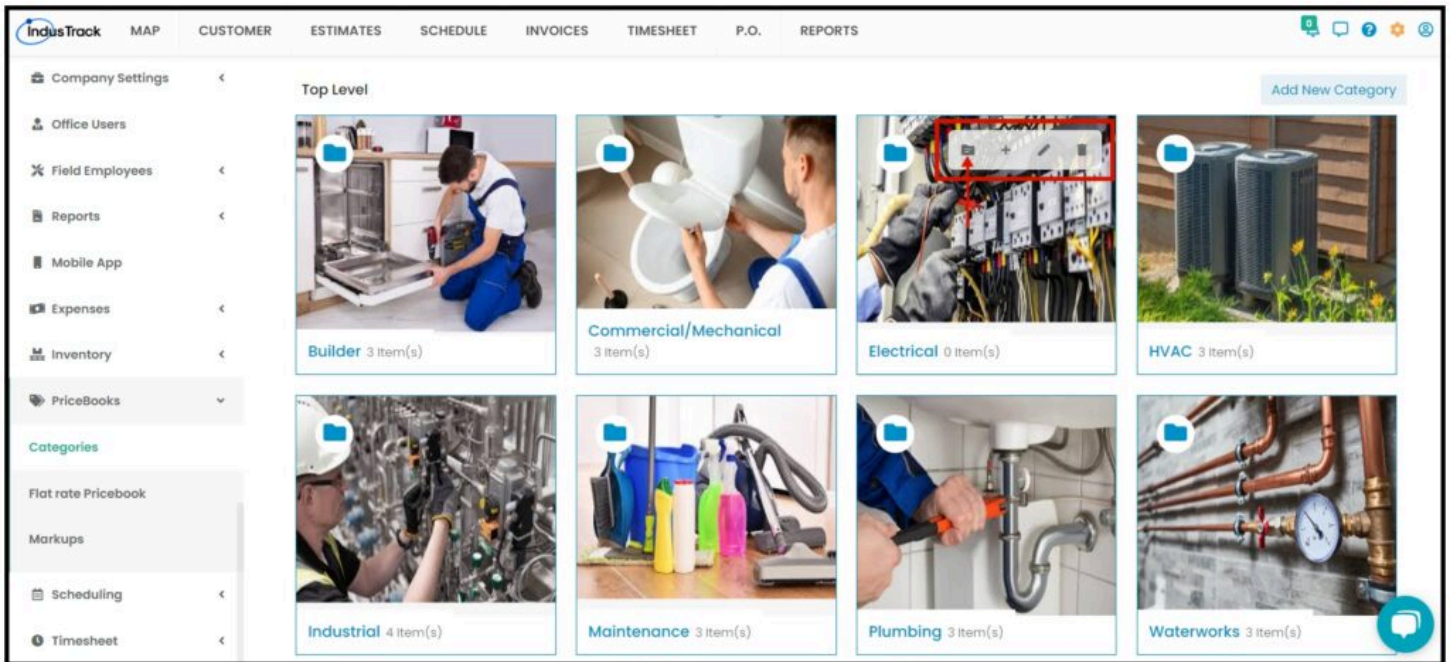


2. To Delete a Category, click on the X Icon.

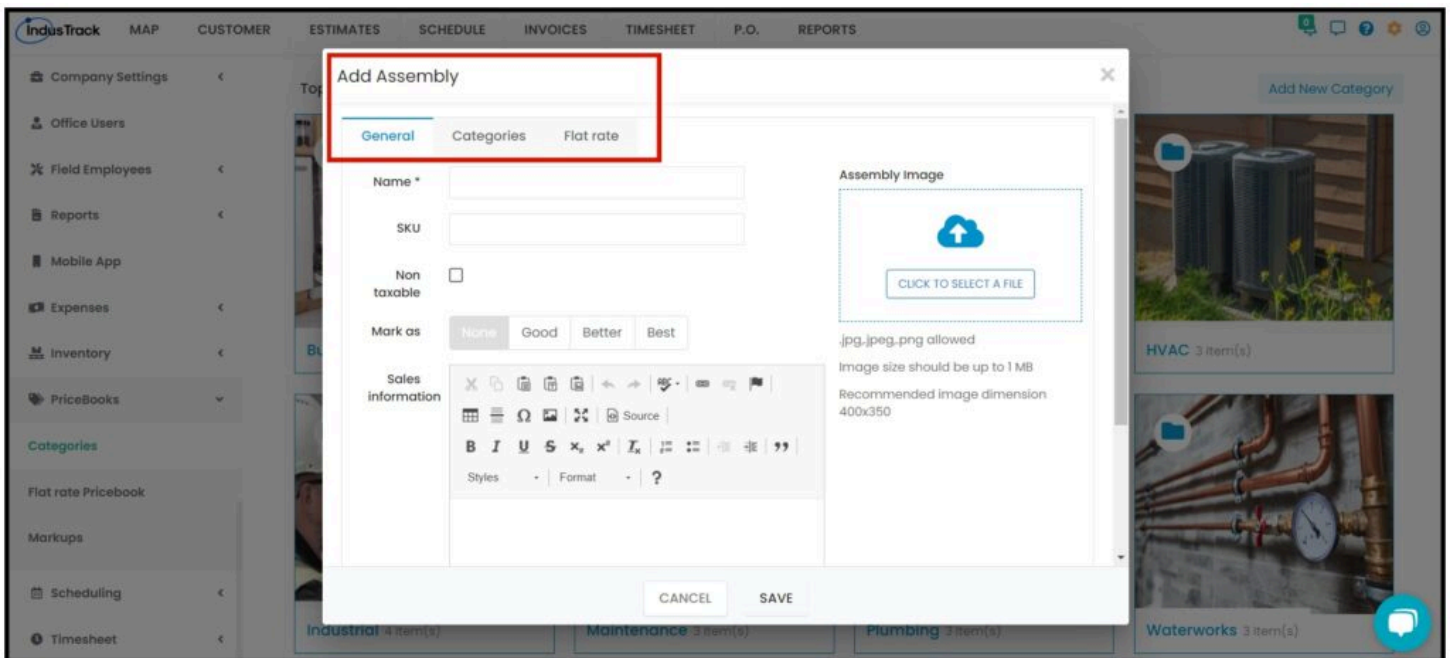
- A window will pop up and will warn you that you are about to delete a category. Click the **Yes** button to continue and **Cancel** to cancel the action.



3. To add Flat Rate into this Category, click on the Folder Icon.



- An add Assembly window will pop up, create an assembly name, and add inventory items, services, and equipment. To know more about **creating assemblies** click [Here](#).



4. To add a subcategory for this main category, click on the Plus Icon. An add Category window will pop up, give the category a name upload a photo if necessary, and click on Save.

Company Settings <

Office Users

Field Employees <

Reports <

Mobile App

Expenses <

Inventory <

PriceBooks

Categories

Flat rate Pricebook

Markups

Scheduling <

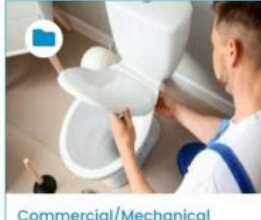
Timesheet <

Top Level

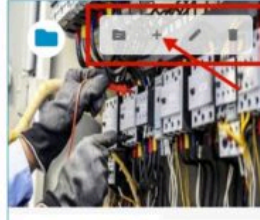
Add New Category



Builder 3 Item(s)



Commercial/Mechanical 3 Item(s)



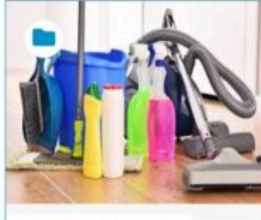
Electrical 0 Item(s)



HVAC 3 Item(s)



Industrial 4 Item(s)



Maintenance 3 Item(s)



Plumbing 3 Item(s)



Waterworks 3 Item(s)

