How to Use the Items Tab under the Customer and Site Level

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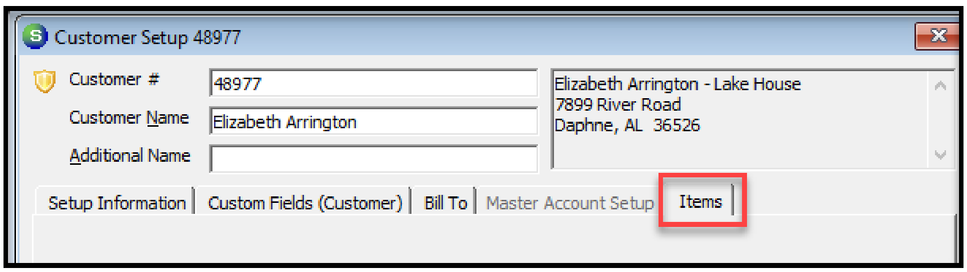
The Items section allows you to select an Invoice Item(s) and enter a specific price for Invoice Items and Recurring at the Customer or Site Level.

When creating an Invoice directly from the Master Account using the Items section this will not carry over to the Subaccounts. A Subaccount is set at the Customer or Site Level.

Customer and Master Account Level

Open a Customer Account and Right-click on Customer Information – select Edit Customer Setup.

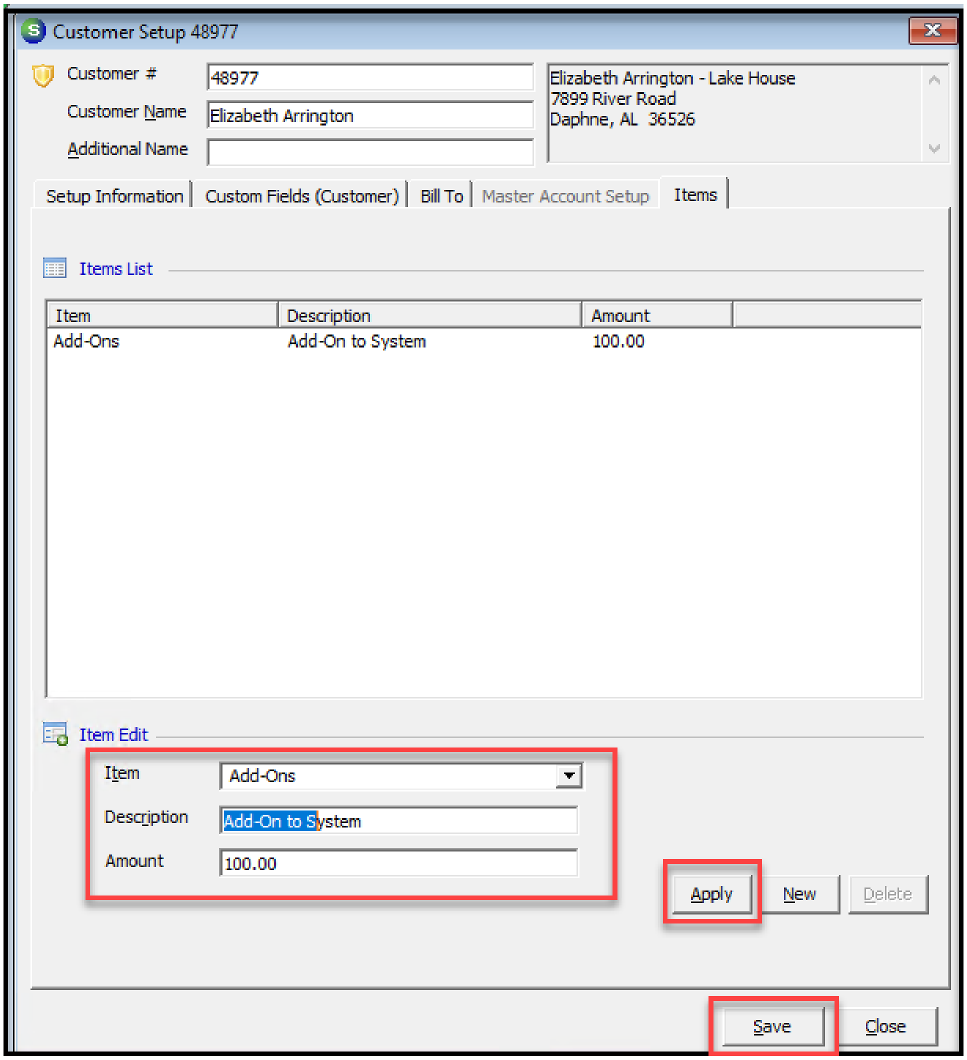
From the Customer Setup Screen select the "Items" Tab.



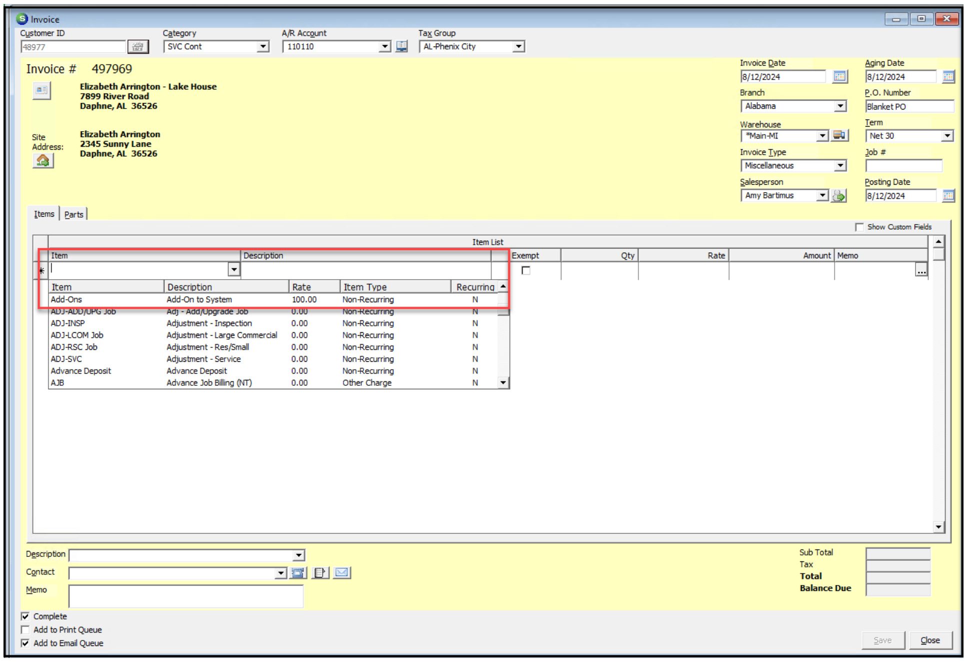
Click "New" and select an Invoice Item from the drop-down menu.

The Description will auto-fill with the Invoice Item Description but this can be edited.

Enter the Amount for that Invoice Item. Click Apply and Save.



Now when an Invoice is created using an Invoice Item under the Items Tab the price will automatically be set using the price entered.



Site Level

Open a Customer Account and Right-click on the Site and click “Edit Site” and the “Items” Tab.

Click “New” and select an Invoice Item from the drop-down menu.

The Description will auto-fill with the Invoice Item Description but this can be edited.

Enter the Amount for that Invoice Item. Click Apply and Save.

Now when an Invoice is created for that specific Site using the Items entered, the price will be automatically set.