

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

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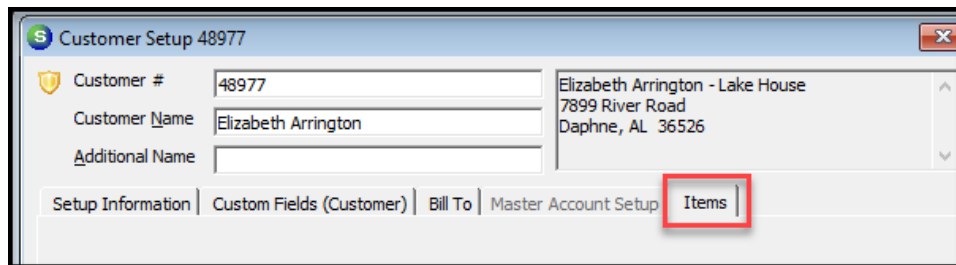
The Items section allows you to select an Invoice Item(s) and enter a specific price for Invoice Items and Recurring at the Customer or Site Level.

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.

A screenshot of a software window titled "Customer Setup 48977". The window has a blue header bar with a close button. Below the header, there are input fields for "Customer #", "Customer Name", and "Additional Name". The "Customer #" field contains "48977", "Customer Name" contains "Elizabeth Arrington", and "Additional Name" is empty. To the right of these fields is a text area containing the address: "Elizabeth Arrington - Lake House", "7899 River Road", "Daphne, AL 36526". At the bottom of the window, there is a tabbed interface with four tabs: "Setup Information", "Custom Fields (Customer)", "Bill To", and "Master Account Setup". The "Items" tab is highlighted with a red rectangular box.

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.

Customer Setup 48977

Customer # 48977 Elizabeth Arrington - Lake House
Customer Name Elizabeth Arrington 7899 River Road
Additional Name Daphne, AL 36526

Setup Information | Custom Fields (Customer) | Bill To | Master Account Setup | Items

Items List

Item	Description	Amount
Add-Ons	Add-On to System	100.00

Item Edit

Item Add-Ons
Description Add-On to System
Amount 100.00

Apply New Delete

Save Close

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

Invoice

Customer ID: 49777

Category: SVC Cont

A/R Account: 110110

Tax Group: AL-Phenix City

Invoice # 497969

Elizabeth Arrington - Lake House

7899 River Road

Daphne, AL 36526

Site Address:

Elizabeth Arrington

2345 Sunny Lane

Daphne, AL 36526

Invoice Date: 8/12/2024

Branch: Alabama

Warehouse: Main-HQ

Invoice Type: Miscellaneous

Salesperson: Amy Bartmus

Posting Date: 8/12/2024

Term: Net 30

Blanket PO

Items | Parts

Item List

Item	Description	Rate	Item Type	Recurring	Exempt	Qty	Rate	Amount	Memo
Add One	Add On to System	100.00	Non-Recurring	N					
ADJ-ADU/UPG Job	Adj - Add/Upgrade Job	0.00	Non-Recurring	N					
ADJ-INSR	Adjustment - Inspection	0.00	Non-Recurring	N					
ADJ-LCCOM Job	Adjustment - Large Commercial	0.00	Non-Recurring	N					
ADJ-RSCL Job	Adjustment - Res/Small	0.00	Non-Recurring	N					
ADJ-SVC	Adjustment - Service	0.00	Non-Recurring	N					
Advance Deposit	Advance Deposit	0.00	Non-Recurring	N					
ASB	Advance Job Billing (NT)	0.00	Other Charge	N					

Description:

Contact:

Memo:

☒ Complete
☐ Add to Print Queue
☒ Add to Email Queue

Sub Total

Tax

Total

Balance Due

Save

Close

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.