

Customer Items

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Customer Items is an option that is available when editing an existing Customer. This option is used to create a list of Invoice Items with a default sales price to be used when that Invoice Item is selected on invoices created for the customer or when creating new recurring lines. This feature would be used if your company has special pricing on certain services for a particular customer. Each customer may have its own list of Customer Items with unique pricing. Customer Items is used in the following situations.

- Service Tickets – Other Charges; if an Invoice Item is selected on the Other charges tab of a service ticket and that Invoice Item is on the Customer Items list, the sales price will default to the amount from the Customer Items.
- Miscellaneous Invoices – If an Invoice Item is selected on the Items tab of a Miscellaneous Invoice and that Invoice Item is on the Customer Items list, the sales price will default to the amount from the Customer Items.
- Creating a new Recurring Line - If an Invoice Item is selected on the New Recurring form and that Invoice Item is on the Customer Items list, the sales price will default to the amount from the Customer Items.

There is also a similar feature available at the Site level referred to as Site Items. Follow the link for more information on [Site Items](#).

Customer Items Setup

1. To create a list of Customer Items, open the Customer Explorer record of the customer for which a Customer Items list will be created. Select the Customer Information option from the customer tree, right-click then select the Edit Customer Setup option.

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2. The Customer Setup form will be displayed; select the Items tab. The Items form is divided into two tiers; the upper tier will display the list of Items and the default sales price as they are added to the list from the lower tier of the form. To add an Item to the Custom Items list, click the New button located in the lower tier of the Items form. Select an Invoice Item from the drop-down list. The description will automatically fill in, however if a different description is to be used for this customer, you may change this default description. Up to 50 characters may be entered into the description field. In the Amount field, type in the sales price that will be used for this Item. Click the Apply button to add the Item. Continue until all Items have been added for the Customer. When finished, click the Save button located at the lower right of the Customer Setup form.

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