

Job Type - Items Setup

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The Job Type Items form allows you to create a list of Invoice Items that will be the only available selections for the Job Type.

This would include all non-recurring and recurring types of invoice item codes. You also have the option of setting a default amount to be used for each invoice item you add to the list. These default amounts will be brought into the job install charges lines and recurring lines automatically.

If you elect to assign a list of invoice item codes to your Job Types, a user will only be able to select from the list assigned to the Job Type. If you prefer not to limit your users to a specific invoice item code list, you would not set up any values for the Job Type allowing the user to select any invoice item on the drop-down list.

Creating a list of available Invoice Items helps to minimize data entry errors.

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