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

Last Modified on 09/13/2024 4:09 pm EDT

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.

	Customer Setup 4	8977		x
٦	Customer # Customer Name	48977 Elizabeth Arrington	Elizabeth Arrington - Lake House 7899 River Road Daphne, AL 36526	^
	<u>A</u> dditional Name			~
	Setup Information	Custom Fields (Customer) Bill To Master	Account Setup Items	

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 Setu	p 48977		
Customer # Customer Nam Additional Nam Setup Information Items List	percent of the region of	Elzabeth Arrington - Lake House 7999 River Road Dephre, AL 36526 Master Account Setup Items	
Item Add-Ons	Description Add-On to System	Amount 100.00	
Ten Edit			
Item Edit	Add-Ons	-	
Descriptio	n Add-On to System		
Amount	100.00	Apply	Delete
		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.

<u></u>													_
Invoice													•
Customer ID		Category	A/R Account		Ta <u>x</u> Group								
48977	127	SVC Cont 💌	110110	- 💷	AL-Phenix City	-							
										Invoice Date		Aging Date	
Invoice	# 497969									8/12/2024		8/12/2024	
	Elizabeth Arrington	- Lake House								Branch		P.O. Number	-
	7899 River Road Daphne, AL 36526									Alabama		Blanket PO	
	Dapline, AL 30320										-		
										Warehouse		Term	
Site Address:	Elizabeth Arrington 2345 Sunny Lane									"Main-MI	- 🛋	Net 30	
	Daphne, AL 36526									Invoice Type		20b #	
										Miscellaneous	-		
										Salesperson		Posting Date	
										Amy Bartimus	- 🐌	8/12/2024	
										1		lot ret core :	-
<u>I</u> tems	Parts											_	
												Show Custom P	
					Item								-
Iter	n	Descriptio	n			Exemp	t .	Qty	Rate		Amount Memo	,	
*		*										l	
Ite	m	Description	Rate	Item Type	Recurrin	• •							
	l-Ons	Add-On to System	100.00	Non-Recurring	N	-							
ADJ	-ADD/UPG JOb	Adj - Add/Upgrade Job	0.00	Non-Recurning	N								
	I-INSP	Adjustment - Inspection	0.00	Non-Recurring	N								
	HLCOM Job	Adjustment - Large Commercial		Non-Recurring	N								
	I-RSC Job	Adjustment - Res/Small	0.00	Non-Recurring	N								
	I-SVC	Adjustment - Service	0.00	Non-Recurring	N								
	ance Deposit	Advance Deposit Advance Job Biling (NT)	0.00	Non-Recurring	N	-							
AJB		Advance Job Billing (NT)	0.00	Other Charge	N	•							
													-
													_
Description			-								Sub Total		
Contact			- 🖬 🖻								Tax Total		
											Total Balance Due		
Memo											parance Due		
	1												
Complete													
T ddd trênt Quaue Save Save Save Save													
Add to E	Add to Email Queue												

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.