

How to Add New Install/RMR Options to the Job

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Issue:

Customer is trying to add a new line item to Installs or RMR but they are not able to add it as it is not available in the dropdown menu on the job.

When they try to select a new Recurring Item or a New Install Item, they're only seeing one item, or no items are available.

For example, see below:

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Resolution:

To add a new Install Item to a job, go to SedonaSetup > Job Types in the JM area.

Select the Job Type being used on the job you need to add the new item to.

When the Job Type is selected, open the Items tab.

In the example below, you will see two items, one is an install item.

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To add a new item, click on the button labeled New, then click on the Item dropdown menu.

Select the necessary items from the Item list and save.

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Click apply to save the change on the Job Type.

Go back to the Job that the new items need to be added to.

Any items added to the job that are a Non-Recurring type will be available to be added to the Installs Item Dropdown.

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