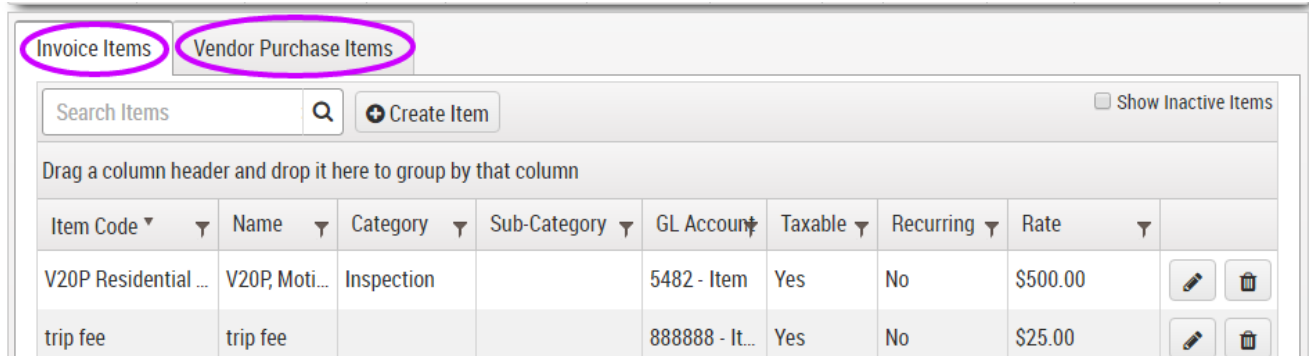


# Items

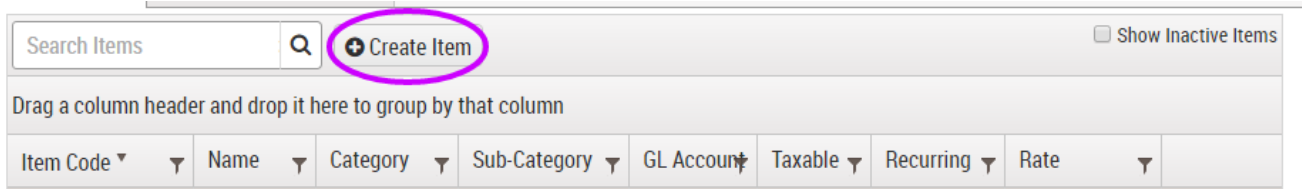
Last Modified on 01/13/2023 3:32 pm EST

Items are intangible products. For example, service calls, inspections, and monitoring would be considered “items”. Invoice Items are billed to customers. Vendor Purchase Items are purchased from vendors (hyperlink to vendors). The following applies to both types of items.



## Adding a New Item

Click “Create Item” at the top of the page.



## Complete Fields

Complete the fields in the “Edit” box that appears.

The screenshot shows the 'Edit' dialog box for an item. The dialog has a title bar with 'Edit' and a close button. It contains the following fields:

- Item Code:** Unique Item Code
- Description:** Item Description
- Category:** Category (dropdown menu)
- Sub-Category:** Sub-Category (dropdown menu)
- GL Account:** GL Account (dropdown menu)
- Default Rate:** (text input field)
- : Taxable
- : Recurring Item

At the bottom right of the dialog are two buttons: 'Update' (with a checkmark icon) and 'Cancel' (with a close icon).

Item Code

Enter a unique item code. This could be an abbreviation. The limit is 25 characters for this field.

### Description

Enter an item description. Customers will see this description on proposals, work orders, and invoices. This limit is 50 characters for this field.

### Category/Sub-Category

These fields provide a way to categorize items for searching purposes. Choose a "Category" from the dropdown box then choose a "Sub-Category" to sort further. (See [Categories](#))

### GL Account

Each item needs to be assigned to a GL account. For further information please contact your accountant.

### Default Rate

Input the amount you will charge customers for this item. This amount can be overridden on proposals, work orders, or invoices. (Enter "0" if there is no charge for this item).

### Taxable

Check this box if the item is taxable.

### Recurring Item

Check this box if the item is recurring. For example, monitoring would be a recurring item.

## Update

Click update in the bottom right corner to save.