

Categories

Last Modified on 01/13/2023 4:18 pm EST

Create categories and sub-categories for your items and parts for searching and sorting purposes. The following instructions apply to both items and parts.

Categories

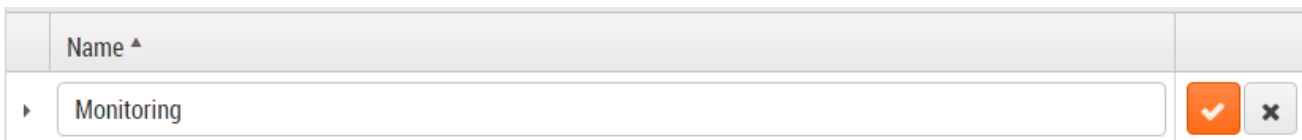


Adding a New Category

Click "New Category" in the upper left corner.

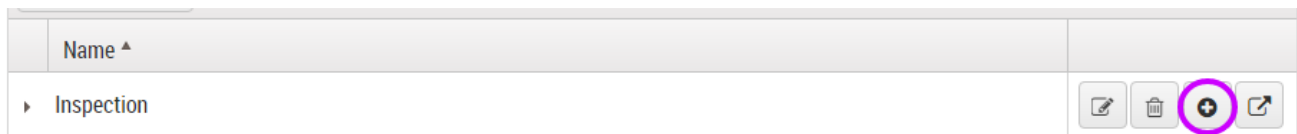


Input the name of the category then click the check mark on the right side of the page to save.



Adding a New Sub-Category

You can add sub-categories to a category to further classify items or parts. Click the plus sign icon to the right of the category you want to create a sub-category for.

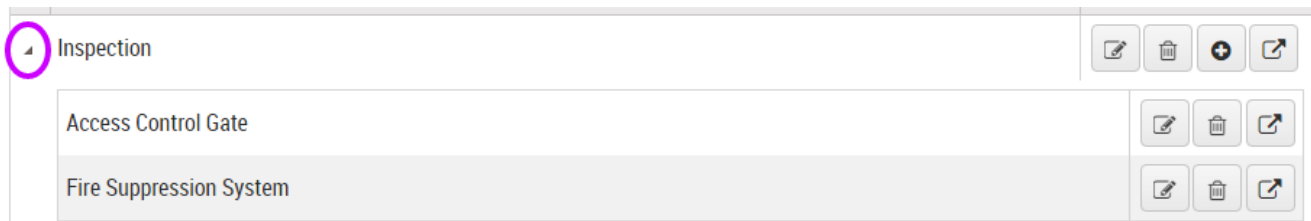


Input the sub-category name and click the check mark on the right side of the screen to save.



The screenshot shows a category management interface. At the top, there is a header for the 'Inspection' category, which is collapsed (indicated by a small black arrow). To the right of the header are four icons: edit, delete, add, and share. Below the header is a list of sub-categories: 'Access Control Gate' and 'Fire Suppression System'. Each sub-category has its own set of edit, delete, and share icons. A purple oval highlights a text input field at the top of the sub-category list, which is currently empty. To the right of this input field is a red checkmark icon and a black 'x' icon, indicating a save and cancel action.

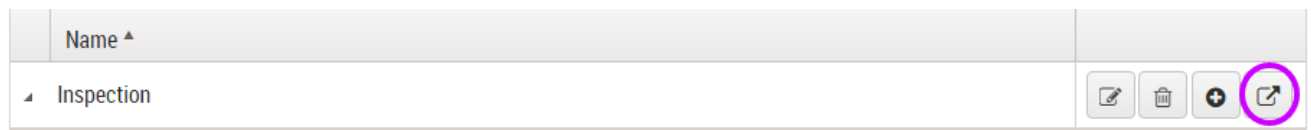
Note: View sub-categories within a category by clicking the black arrow to the left of the category name



The screenshot shows the same category management interface, but the 'Inspection' category is now expanded. A purple circle highlights the small black arrow icon to the left of the 'Inspection' category name. The sub-categories 'Access Control Gate' and 'Fire Suppression System' are now visible below the category name. Each sub-category has its own set of edit, delete, and share icons.

Adding Items (or Parts) to Categories or Subcategories

Click the arrow icon to the right of the category or subcategory you would like to add items (or parts) to.



The screenshot shows a table with a header row and one data row. The header row has a column labeled 'Name' with a small upward-pointing arrow next to it. The data row has a small black arrow icon to the left of the text 'Inspection'. To the right of the 'Inspection' row are four icons: edit, delete, add, and share. A purple circle highlights the share icon.

Check the boxes to the left of the items/parts you would like to add. If you would like to add a new item/part click "Create Item" (or "Create Part") in the upper right corner, complete fields (See [items](#) and [parts](#)), and click "Save". After you are finished, click "Add Items" (or "Add Parts") in the bottom right corner to update.

Add 'Inspection' to Items

Search Items



Items Selected: 2

Create Item

Drag a column header and drop it here to group by that column

Select	Item Code	Name	Category	Sub-Category	GL Account	Taxable	Recurring	Rate
<input checked="" type="checkbox"/>	V20P Residential...	V20P, Motion, 2 Conta...	Inspection		5482 - Item	Yes	No	\$500.00
<input checked="" type="checkbox"/>	trip fee	trip fee			888888 - It...	Yes	No	\$25.00
<input type="checkbox"/>	total connect	total connect			65454 - Item	No	Yes	\$888.00
<input type="checkbox"/>	Service Labor	Service Labor			43000 - Item	Yes	No	\$0.00
<input type="checkbox"/>	Service Fee	Service Fee			43000 - Item	Yes	No	\$0.00
<input type="checkbox"/>	Referral Discount	Referral Discount			354 - Item	No	Yes	\$0.00
<input type="checkbox"/>	Recurring	Recurring Credit			1234 - Item	Yes	No	\$10.00
<input type="checkbox"/>	Radio Backup	Radio Backup Monitor...			41000 - Item	Yes	Yes	\$0.00
<input type="checkbox"/>	Payments	Payments			665555 - It...	No	Yes	\$0.00
<input type="checkbox"/>	Service Par	Parts & Equipment			43000 - Item	Yes	No	\$0.00

Navigation buttons: Home, Previous, 1 (selected), 2, 3, Next, End

1 - 10 of 21 items

Cancel

Add Items