Categories

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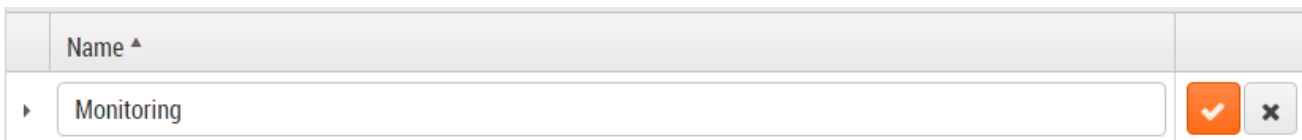

Adding a New Category

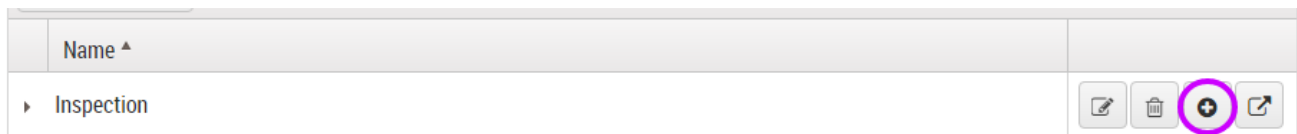Click "New Category" in the upper left corner.

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.
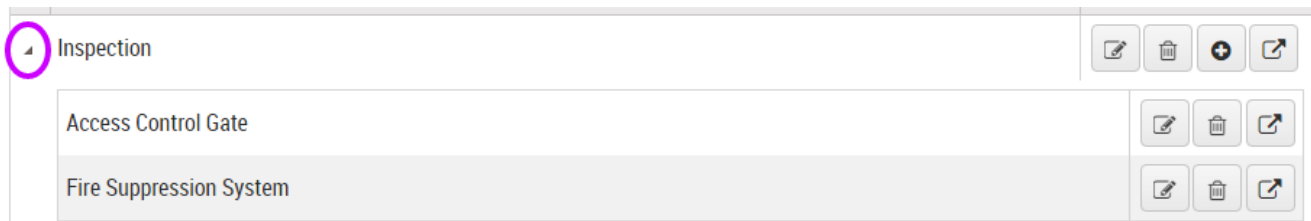
Input the sub-category name and click the check mark on the right side of the screen to save.
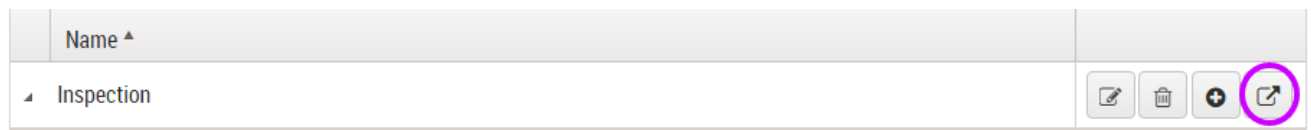
Note: View sub-categories within a category by clicking the black arrow to the left of the category name

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.

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 ▼
☑	V20P Residential...	V20P, Motion, 2 Conta...	Inspection		5482 - Item	Yes	No	$500.00
☑	trip fee	trip fee			888888 - It...	Yes	No	$25.00
☐	total connect	total connect			65454 - Item	No	Yes	$888.00
☐	Service Labor	Service Labor			43000 - Item	Yes	No	$0.00
☐	Service Fee	Service Fee			43000 - Item	Yes	No	$0.00
☐	Referral Discount	Referral Discount			354 - Item	No	Yes	$0.00
☐	Recurring	Recurring Credit			1234 - Item	Yes	No	$10.00
☐	Radio Backup	Radio Backup Monitor...			41000 - Item	Yes	Yes	$0.00
☐	Payments	Payments			665555 - It...	No	Yes	$0.00
☐	Service Par	Parts & Equipment			43000 - Item	Yes	No	$0.00

|◄ ◄ **1** 2 3 ► ►| 1 - 10 of 21 items ↻

✖ Cancel   ✓ Add Items