

Add Site Item Defaults

Last Modified on 12/12/2024 1:49 pm EST

If there is a certain price you charge a customer for particular invoice items that is different than the default price, you can create a list for the customer's site. Setting up Item Defaults is optional.

To add Item Defaults to an existing site, from the main menu, arrive at the Customers list with this path: CRM > Customers.

The Customers list is displayed. If you know the name of the customer to which the Site is attached, locate the Customer, and then click on the hyperlink in the Customer # column to open the customer record.

If you do not know the customer number or customer name to which the Site is attached, but you do know the Site Name, click on the Sites tab to search for the customer by Site Name.

Search by Site

At the upper left of the page is a search field. Type in the first four characters of either the customer number or the Site Name to locate the record faster. Once you have located the Site within the list, click on the hyperlink in the Customer # column to open the customer record.

The screenshot shows the 'Customers' interface with the 'Sites' tab selected. A search field labeled 'Search Sites' is highlighted with a green circle. Below the search field is a table with columns: Cust..., Site #, Cust..., Site #, Site Name ↑, Address, City, State, and Comments. The table contains several rows of data, including customer numbers and site names like 'Castle Park'. At the bottom right, there is a 'Refresh' button and a status indicator '1 - 100 of 249 items'.

Custo...	Site #	Custo...	Site #	Site Name ↑	Address	City	State	Comments
3652	1	3652	1	Cactus World-corporate	3601 Saguaro Street	Tucson	AZ	
1521	1	1521	1	Castle Park	223 Fate Street	Chagrin Falls	OH	
1365	11	1365	11	Castle Park	223 Fate Street	Chagrin Falls	OH	
1528	1	1528	1	Castle Park	223 Fate Street	Chagrin Falls	OH	
1365	13	1365	13	Castle Park	223 Fate Street	Chagrin Falls	OH	
1530	1	1530	1	Castle Park	223 Fate Street	Chagrin Falls	OH	
1365	14	1365	14	Castle Park	223 Fate Street	Chagrin Falls	OH	
3003	10050051	3003	10050051	Castle Park	223 Fate Street	Chagrin Falls	OH	
3017	10050051	3017	10050051	Castle Park	223 Fate Street	Chagrin Falls	OH	

The Customer record is displayed. Click on the Sites/Systems tab, and then in the Site Number column, click on the hyperlink of the desired site.

Emily Wood
Customer #3719 Active Normal Residential-Owner • Since 3/4/22

Total Balance Due Total RMR
\$0.00 **\$0.00**

Customer Aging

Address 45722 Chandler
Plymouth, MI 48170
Phone (734) 258-4646
Cell (734) 258-3311
Email emilyLwood@gmail.com

Salesperson Dan Brown
Last Statement
Default Term
Delivery Method Print
Delivery RMR Inv

Comments

Invoices 0 Credits 0 **Sites/Systems 1/0** RMR 0 Work Orders 0 Proposals 0 Payments 0 CC/eCheck 0 Notes 0 Contacts 0 Documents Archive Custom Fields eForms Emails

+ Add Site Show Inactive Sites

Site N.	Site Name	Address	City	Sta.
+ 3719-01	Emily Wood	45722 Chandler	Plymouth	MI

1 - 1 of 1 items Refresh

The Site record is displayed. Click on the Item Defaults tab, and then click the **Add Item Default Rate** button.

3719-01 - Emily Wood
Active Emily Wood - 3719

45722 Chandler, Plymouth, MI 48170 RMR **\$1.00**
(734) 258-4646
emilyLwood@gmail.com

Warranty Start 03/04/2022 Sales Tax Michigan
Warranty Labor Labor - 1 Year Tax Rate 6%
Warranty Part Parts - 1 Year Tax Exempt -
Service Level SVC T&M RES Site Since 03/04/2022
Inactive Date -

Notes 0 Systems 1 RMR 1 Work Orders 0 Site Parts 0 Contacts 0 Zones 0 Authorities 0 Docs Custom Fields **Item Defaults** eForms Part Ledger External

+ Add Item Default Rate

Item	Description	Rate	
Monitoring	Monitoring Services	25	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

1 - 1 of 1 items Refresh

The Edit Default Item Rate form opens. In the Items field, select an Invoice Item from the drop-down list. In the Rate field, enter the amount you would charge the customer at this site for the item.

When finished, click on the **Save** button.

Edit Default Item Rate ✕

Items • ▼

Rate • ▲ ▼
