# Add Site Item Defaults

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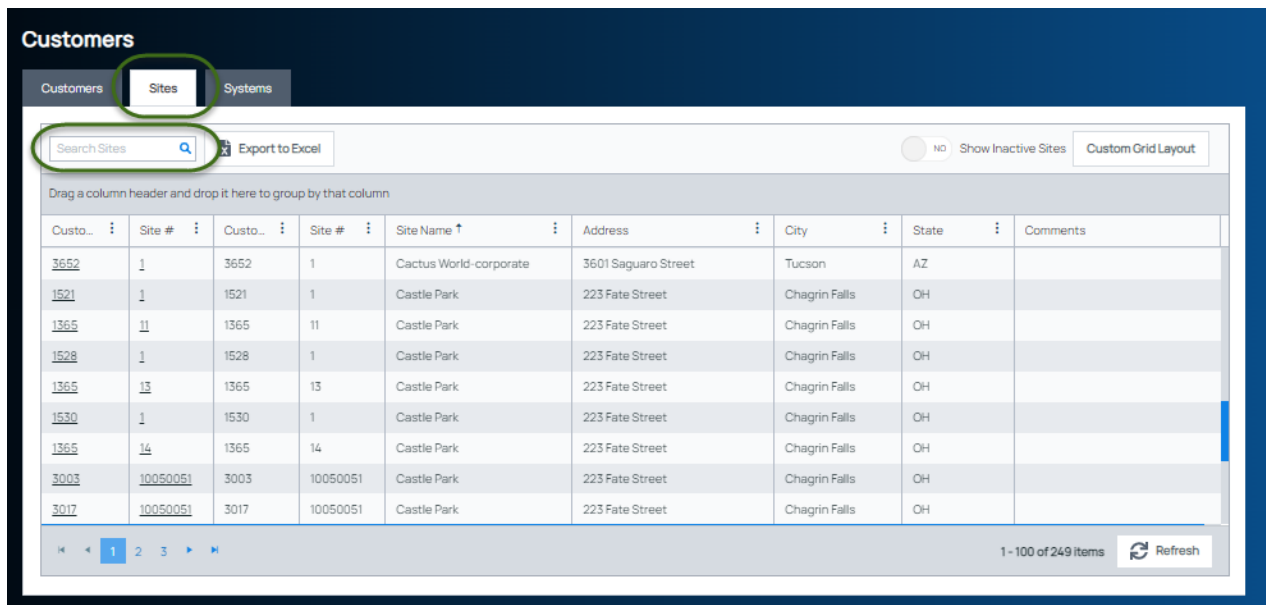
To add Item Defaults to an existing site, from the main menu, arrive at the Customers list with this path: Accounts Receivable > Customers.

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 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.

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



The Edit Default Item Rate form is displayed. 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 • Monitoring

Rate • 25.00

Save    Cancel



Edit Default Item Rate

Items • Monitoring

Rate • 25.00