Types Overview

Types are used for categorizing Invoice Items and Inventory Parts. When creating or editing an Invoice Item or Inventory Part, there is a Type and Sub-Type field on the data entry form. Both Types and Sub-Types are entered and maintained in the Types setup table.

There are two tabs on this page, Items and Parts. On the Items tab, you create and maintain types that are only used when creating or editing an Invoice Item. On the Parts tab, you create and maintain Types that are only used when creating or editing an Inventory Part.

On the Parts tab, you create and maintain Types and Sub-Types that are only used when creating or editing an Inventory Part. When creating or editing an Inventory Part, selecting a Type or Sub-Type is optional.   The Type fields are designed to help you find a part faster when using the filters on the Parts List. Therefore, you should plan carefully how best to use both of these fields.

With respect to Parts, in our examples below, we created our Types to be fairly generic – different types of systems. The Sub-Types are the device types used for that particular type of system installation.