

# Items Catalog

## Items Catalog

The screenshot shows the 'Items' management interface. At the top, there are buttons for '+ New Item' and 'Generate Report'. The summary cards display the following data:

Category	Value	Subtext
Total Items	0	Products and services
Taxable Items	0	Subject to tax
Average Price	\$0.00	Across all items
Highest Price	\$0.00	Top priced item

The table below has the following structure:

Name	Description	Price	Taxable?	Created At
No results.				

The Items page is your library of products and services. Saving your standard offerings here allows you to quickly pull them into any new invoice without re-typing details.

## The Items Overview

At the top of the screen, you can see the overall status of your service catalog:

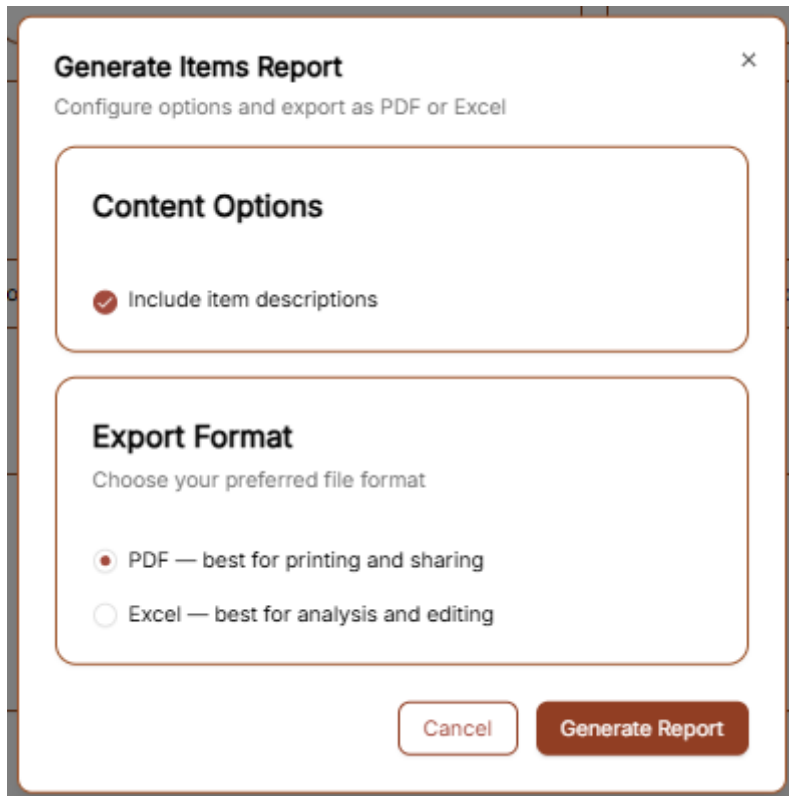
- Total Items: The number of unique products or services you have saved.
- Taxable Items: A count of items currently marked as subject to tax.
- Average Price: The middle-point price across your entire list.
- Highest Price: The price of your most expensive single offering.

## Managing Your Catalog

The main table lists all your saved items and their key details:

- Search: Use the "Search items by name or description..." bar to find a specific service.
- Information Columns: The table displays the Name, Description, Price, and Taxable? status for each entry.
- Organization: You can see when an item was first added under the Created At column.
- New Item: Click the brown + New Item button at the top right to add a new service to your library.

# Generating Items Reports



The screenshot shows a configuration window titled "Generate Items Report" with a close button (X) in the top right corner. Below the title is the subtitle "Configure options and export as PDF or Excel". The window is divided into two main sections: "Content Options" and "Export Format".

**Content Options**

- Include item descriptions

**Export Format**

Choose your preferred file format

- PDF — best for printing and sharing
- Excel — best for analysis and editing

At the bottom of the window, there are two buttons: a light brown "Cancel" button and a dark brown "Generate Report" button.

To export a list of your products and services, click the Generate Report button. The configuration window offers the following:

- Content Options: Check "Include item descriptions" if you want the full text of your services included in the export.
- Export Format: Choose between PDF (best for printing) or Excel (best for analysis and editing).

Click the brown Generate Report button to finalize the download.

## Adding a New Item

**New Item** ×

Add a new item to your catalog

Name \*

Consulting Hour

Description

Detailed description of the item or service...

Price \*

0

Check if this item is subject to sales tax

Create Item

To build your catalog of standard services or products, click the brown + New Item button at the top right of the Items page. This opens a creation form with the following fields:

- Name: Enter a clear, professional title for the service (e.g., "Consulting Hour").
- Description: Provide a detailed explanation of what is included in this item. This text can be included in your generated reports.
- Price: Set your standard rate for this item. This price will automatically populate whenever you add the item to a new invoice.
- Taxable Status: If this service is subject to sales tax, ensure the "Check if this item is subject to sales tax" box is selected.

Once the details are finalized, click the brown Create Item button to add it to your permanent catalog.

---

Revision #1

Created 2026-05-12 10:58:22 UTC by Bernadette F

Updated 2026-05-12 11:01:36 UTC by Bernadette F