

Product Management

Product Management allows a user to create and update Products independently of Accounts.

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

1. Search for a Product

There are 2 methods to search for a Product. The first is on the Banner Section using the Global Search function. Refer Global Search section.

The other method offers more fields and options to refine the search and can be accessed by selecting Product Management from the Menu Bar and select Search Product from the Left Menu Section.

The User can search for a Product or a list of Products by filtering on the following criteria:

- Product name
- Product code
- Product description
- Product type
- Price range (from - to)
- Number remaining range (from - to)

2. Create a Product

Products can be created independently of Accounts. This means the User does not have to select an Account before creating a Product.

All required fields are in **bold**

Field	Description
Product Code	Unique code for the product
Product Name	Product Name
Description	Product description

Product Type	Product type or category, Service or Product
Price	Product price excluding taxes and discounts
Tax	Tax amount applicable
Tax Percentage	Tax amount as a percentage of Price
Discount	Discount amount, if applicable
Discount percentage	Discount amount as a percentage of Price
Remaining	Inventory, number of items remaining

Table 1:

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3. View a Product

Product details can be displayed by selecting (clicking) Product name link (where Product name is underlined) where available on some screens or from the View All Products table (displayed when Product Management action is selected).

All Product details are displayed along a tab at the bottom. This tab provides summary information in relation to the Product. The tab is:

3.1. Sales tab

Sales tab - view all Sales/Leads for a Product

Displays:

- Date Note was created
- Date Note was updated
- Short description
- View/Edit/Delete operations

The tab will only display Sales/Leads related to Accounts which the User has permissions to View.

If access is needed for an Account that is not in this list, contact the application Administrator to change the Users privileges.

3.2. Attachments tab

Product Management

Attachments tab - view all Attachments for a Product

Displays:

- Date Attachment was created
- Date Attachment was updated
- Filename
- Short description
- View/Edit/Delete operations

4. Edit a Product

This function is accessible from the Left Menu Section. It allows the User to change and update any details.

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5. Delete a Product

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6. Add a Product Attachment

Attachment can be used to store large amounts of information. The User can create an Attachment by selecting the Add Attachment link in the Left Menu Section.

7. View a Product Attachment

This operation is only accessible from the View Product screen.

To perform this action:

- Select View Product function to access the tabs (below Product details).
- Select the Attachments tab to access the operations View, Edit, and Delete.
- Select View or the Created Date.

8. Edit a Product Attachment

This operation is only accessible from the View Product screen.

To perform this action:

- Select View Product function to access the tabs (below Product details).

- Select the Attachments tab to access the operations View, Edit, and Delete.
- Select Edit.

9. Delete a Product Attachment

This operation is only accessible from the View Product screen.

To perform this action:

- Select View Product function to access the tabs (below Product details).
- Select the Attachments tab to access the operations View, Edit, and Delete.
- Select Delete.