

Products Table

The Products table holds products that your company sells and the product values are pulled into Opportunities and Products Quoted.

Use Case

The following section contain information on creating and processing Product records.

Creating Product Records

Product records can be created directly using the web form. Product records need to be created before they are available in any of the other tables such as Products Quoted.

Processing Records

Admin users and members of the Sales group can create and edit Products. View access is limited to members of the Marketing, Sales and Service Manager and Support Staff groups. No other groups have access to the table by default.

Products are categorized by the type, e.g. Part, Software or Service. Products that are no longer needed can be marked Inactive and will not appear in drop down lists when quoting a product.

Ownership

Records in this table are owned by the user who creates them.

Reports

The Products table contains four default Charts/Reports.

<input type="checkbox"/> Edit View	Title ↑		Filter	Published	Date Updated	Output Format	Type of Report
<input type="checkbox"/>  	Completed Sales by Product Type		C: Some units were sold	Yes	Nov 26 2018 16:52	Graphical chart, HTML	Standard
<input type="checkbox"/>  	Potential Sales by Product Type		C: Some units were sold	Yes	Nov 26 2018 16:52	Graphical chart, HTML	Standard
<input type="checkbox"/>  	Products in Price Range			Yes	Nov 26 2018 16:52	Graphical chart, HTML	Standard
<input type="checkbox"/>  	Sales Totals by Product		C: Some units were sold	No	Nov 26 2018 16:52	Graphical chart, HTML	Standard