

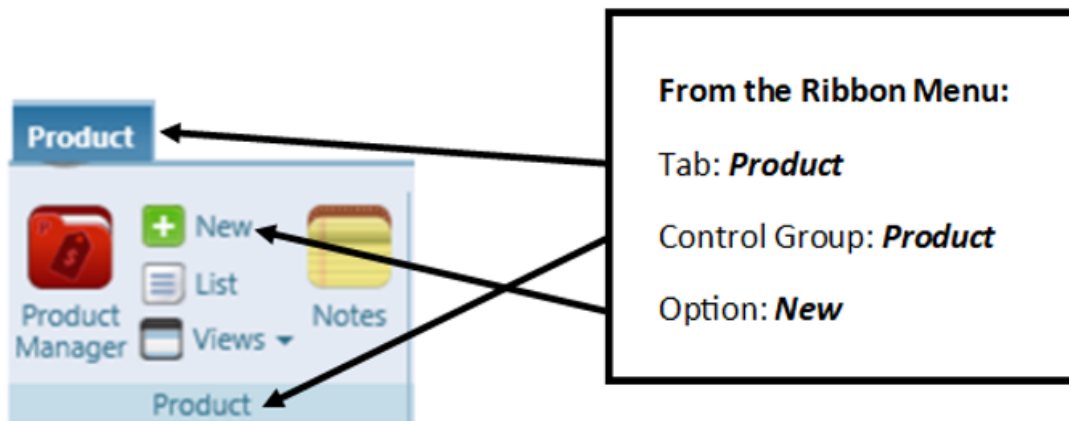
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How Do You Add a Product Resource?

Tammy Mason - 2022-07-20 - in Products

How Do You Add a Product Resource?



Explanation: If you plan to use a Product now and in the future in Orders or if there are specific rules regarding being Taxable/Commissionable, it is recommended a Product Resource is entered. This will limit reentry of information plus ensure correct Tax records and Commission payments.

General Expander

Code: After clicking New from either the Product Manager or the New option in the product group, enter a product code. Codes can be up to 15 characters, either numeric, alpha or a combination of the two.

Name: The Name field listed here is the product description that defaults on Quotes, Orders and Invoices.

Unit: Select the Unit of measure used to order and invoice this product.

Status: Will be active until you are no longer using this product. The Status of a Product Resource can be set to inactive by clicking

on Active, changing it to Inactive and then saving the Product. The Product Resource will still be available to make Active, if/when necessary by simply clicking and saving again. A product can be deleted if certain criteria is met:

- No quotes, orders or invoices exist with a date greater than the requested delete date entered.

Products can be deleted under Tools>Control>Archive/Delete Data

Description: The Description field is used only for additional information about a product resource. It does not print on quotes, orders, or invoices.

Created: When a Product Resource is added, the date defaults to today's date. However, the date field can be edited. This is for informational purposes.

Taxable, Commissionable, Is Freight, checkboxes: Place checkmarks in the appropriate boxes, to define if a product is taxable and/or commissionable, or is a freight product, to save you time during order entry and ensure accuracy.

Miscellaneous checkbox: Check this box if there is no default price/cost/vendor for this resource. When checked, changing the quantity or vendor will not change the price or cost on an order product line.

Hide From Customer checkbox: This will determine the default used when the product is populated into a quote, order or invoice. If a price exists on the product (standard, program pricing, upcharge, etc.) the hide from customer check box will be unchecked and disabled.

Product Additional Charges									
Update Close									
Code	Description	Per Product	Usage	Unit	Price				
▼ setup	Setup Charge for this product	<input checked="" type="checkbox"/>	1	Each	0.00	<input type="checkbox"/> Hide From Customer	<input type="checkbox"/> Personalization		
▲ GB DECOR	Gray or Blue Decoration	<input type="checkbox"/>	1	Each	\$2.00	<input type="checkbox"/> Hide From Customer	<input type="checkbox"/> Personalization		
Method	Drop Ship	Vendor	12000	Abercrombie Printing	SKU	GB DECOR			
Quantity	1	0	0	0	0	0	0	0	0
Purchased	\$2.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
Matrix Attached Artwork (0) Instructions (0) Destination									