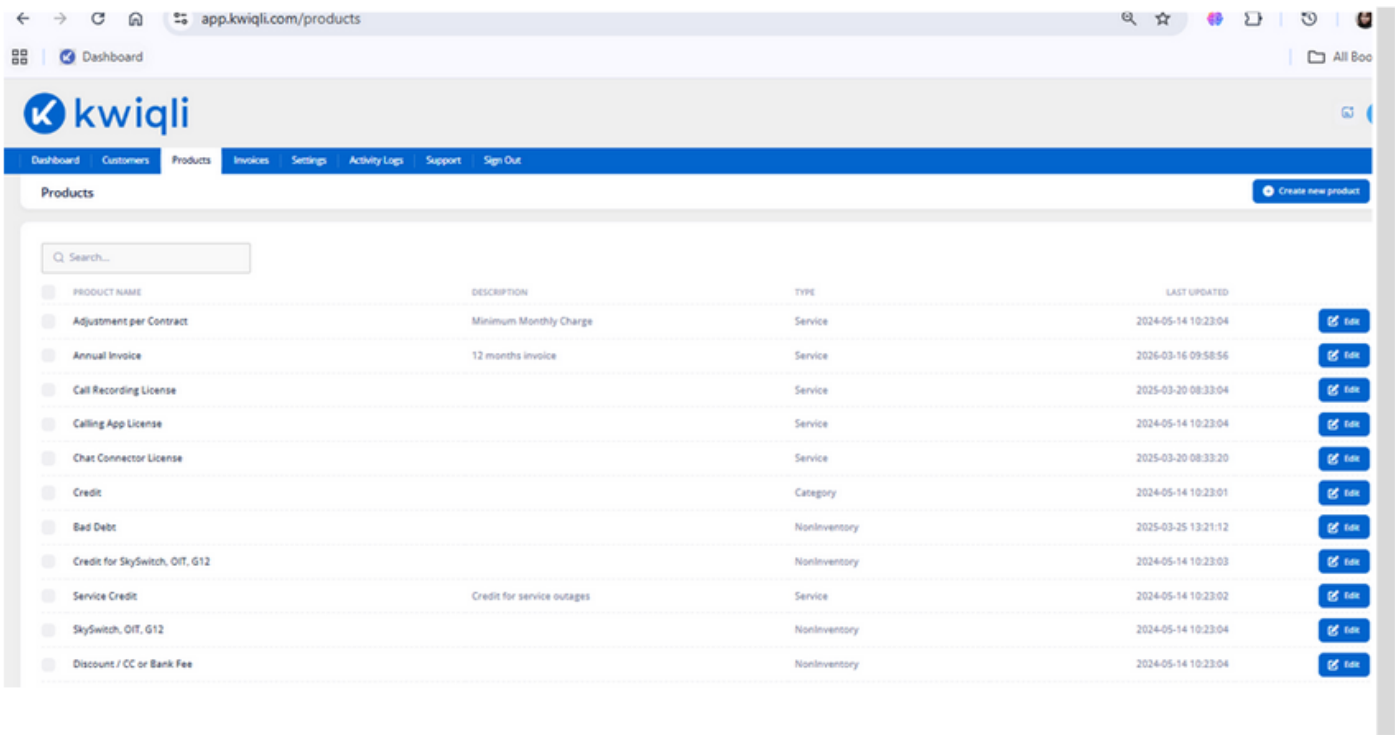


Products

The Products module manages products and services used for billing and invoicing.

Viewing Products

- 1. Click the Products tab.
- 2. Review the product list.
- 3. Use the Search field to locate products.



Functions

- Review available products
- Check product types
- View synchronization status

Creating a Product

1. Click Create New Product.
2. Enter:

- Product Name
- Description
- Product Type
- Click Submit.

Dashboard

kwikli

Dashboard Customers Products Invoices Settings

Products

Search...

PRODUCT NAME
Adjustment per Contract
Annual Invoice
Call Recording License
Calling App License
Chat Connector License
Credit
Bad Debt
Credit for SkySwitch, OIT, G12
Service Credit

Create New Product

Product Name *

A product name is required and recommended to be unique.

Description

Type *

Income Account Ref *

Asset Account Ref *

Expense Account Ref *

Submit →

Functions

- Add billable services
- Configure invoice products
- Sync products to QuickBooks

Editing Products

1. Locate the product.
2. Click Edit.
3. Update the product information.
4. Submit changes.

Dashboard

kwikli

DashboardCustomersProductsInvoicesSettings

Products

Search...

PRODUCT NAME	
Adjustment per Contract	
Annual Invoice	
Call Recording License	
Calling App License	
Chat Connector License	
Credit	
Bad Debt	
Credit for SkySwitch, OIT, G12	
Service Credit	

Edit Product

Product Name *

Adjustment per Contract

A product name is required and recommended to be unique.

Description

Minimum Monthly Charge

Type *

Service

Income Account Ref *

Sales

Asset Account Ref *

None or Not available

Expense Account Ref *

None or Not available

Submit

Functions

- Modify pricing information
- Update billing descriptions
- Manage active services

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