



Data Store User Guide

How to Link Products to a Project

This module shows how the reference owner can bundle one or more references as 'products' associated with a 'project' reference.

General Steps

Step 1. Create a Product Reference

Create references for each of the products using the standard process of creating references. Make sure to activate the product reference when you're finished.

Step 2. Create a Project Reference

Create the project reference record, again following the standard process and make sure you activate it as well.

Step 3. Edit the Project and Link to Products

Go back into the project record and under Actions, select Edit. Then click on the Products tab and add the related products. You can do this by either specifying the reference codes or searching by text.



Image 1: Link products to a project.

If using the **Code Search**, the number of references returned may be fewer than the number you typed because:

- You do not own the other references
- References are already associated with another project (one product can only relate to one project).
- The reference code is invalid
- You entered duplicate reference codes

If you use the **Text Search**, only those references that you own will be returned.

Select one or more references to add to the Project.

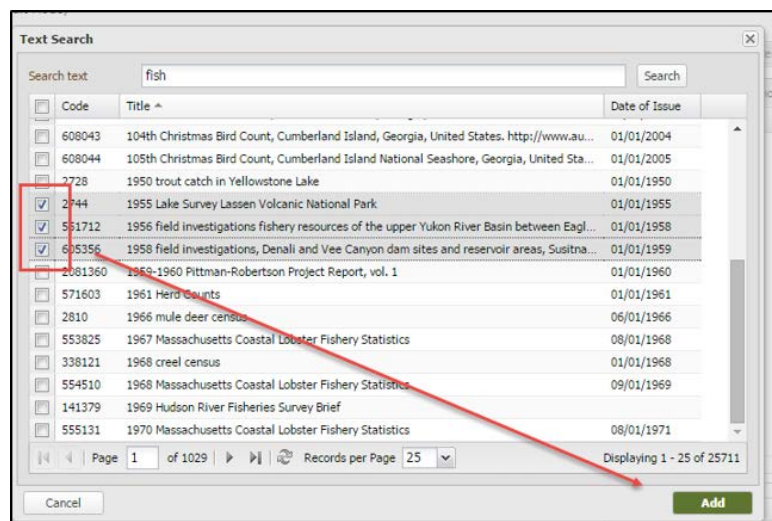


Image 2: Selecting products.

Removing Products

In general, products should not be removed from a finalized project; however, there are some cases when doing so (such as correcting mistakes) is valid. You can remove each individually or remove all Products.



Image 3: Remove products from the project.

Also note the following:

- Inactivating the project reference will break the links to all of its products
- Inactivating a product will break the link to the project