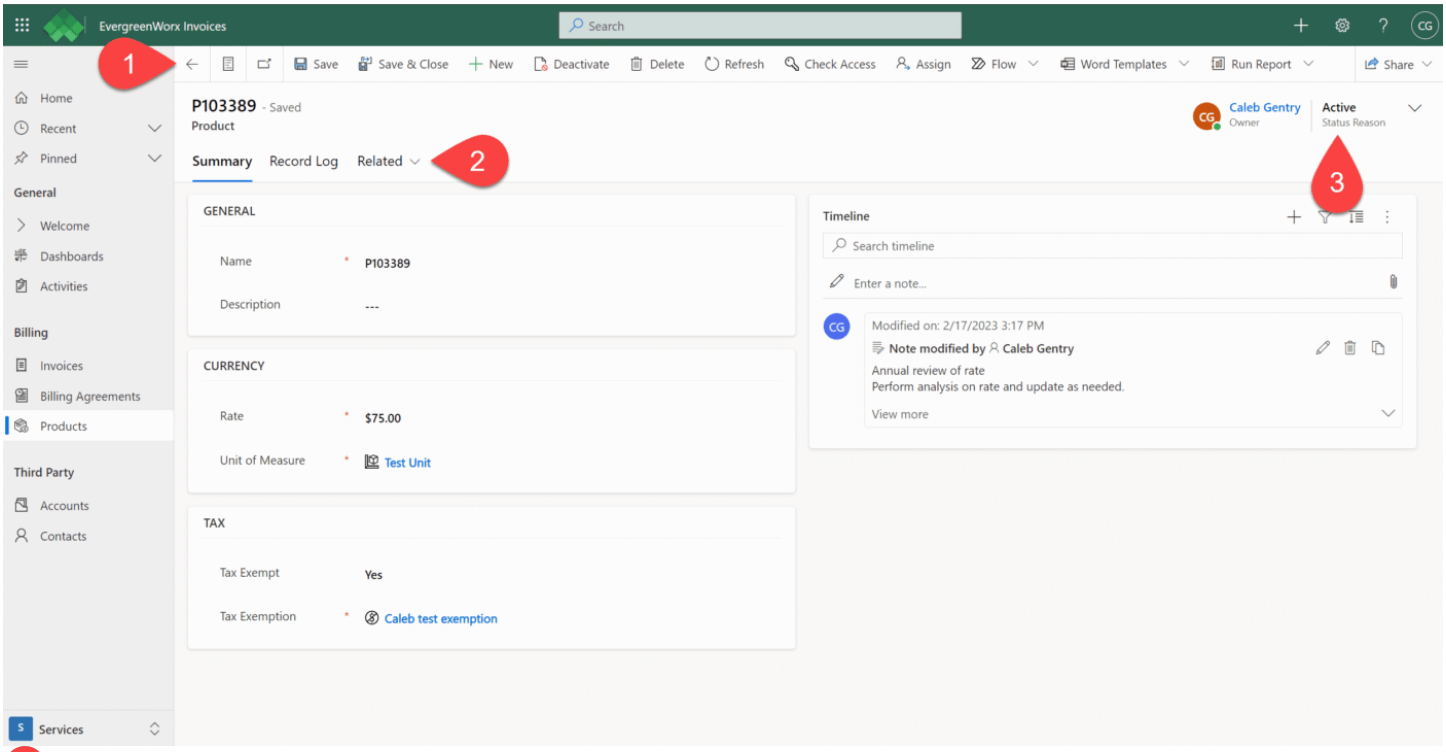
Products

Invoices · https://evergreenworx.com/docs/products/

The Product record form stores key data about items that can be billed for their use.



1 In the ribbon, available actions are displayed for the current Product record, such as deactivating the record, deleting the record, or running a report. The actions available depend on your security role and permissions.

2 Record forms have tabs that allow the user to move between different data elements of the record. On the Product record, you'll see the following tabs:

- Summary – Displays identifying information for the Product such as the billing rate, unit of measure, and whether it is tax exempt or not. The Timeline stores historical notes and activities against the record. For more information, see Timeline | EvergreenWorx.
- Record Log – Provides information concerning when the record was created and changed.
- Related – Other related items, such as Record Audit History and Activities.

3 Status of the record shows whether this is an active Product, or whether it has been inactivated and is no longer available.