Client Inventory Management

An essential component enabling you to keep track of all important technologies and products for each client.

The three step procedure for inventory management is:

1. Setting up the correct Technical Classification
2. Creating a product
3. Adding that product to a client network or machine

<u>Technical Classifications</u>

At the core of each product are technical classifications. A sample list of classifications is available by selecting 'Manage Tech Classifications' from the Admin drop down. From here you may add edit or delete the root level for all products.

Once you have setup a correct classification, you may proceed to creating a product.

<u>Creating a Product</u>

1. Select 'Add New Product' from the Admin drop down
2. A product can be added to either a client network or machine level. Examples of network level products are; routers, ISP info, switches, etc. Examples of machine level products are; Operating systems, virus protection, hardware detail, etc.
3. Select Either an existing provider or create a new one in the 'Other' Field
4. Select the proper Tech Classification
5. Enter the Product Name
6. Enter any product information in the Label fields.

   The 'Label' fields are where you can specify what type of product information you wish to track. Any number of fields may be used. Label 6 and 7 are reserved for date inputs.

   An Example of a Router product can be:

Label 1	Model Number
Label 2	Firmware
Label 3	Remote Access
Label 4	Username
Label 5	Password
Label 6	Support Expiration Date

7. Select the appropriate permission settings for each label under the 'Viewable By' dropdown. This setting will determine which users may view the specific field.

Note: Once a product is created, any usage of the product will use the original Viewable By permission settings. You may also change a specific field's Viewable By permission setting globally for all instances of the product across all clients. Place a check in the Reset Permissions Globally for any field you wish to update and click Submit.

Adding a product to a client network or machine

In order to add a product a pre-existing network or machine must be added to a client.

Every client can have multiple locations
Every location can have multiple networks
Every network can have multiple machines

Select a client location and click on the ‘Add Network’ link. Once a network is created you may add a machine to it by clicking on ‘Add Machine or Server’

1. Select the appropriate network or machine and click on the ‘Add Product’ link.
2. Select the appropriate Tech Classification
3. Select from the associated list of products

Note: Depending on whether you are adding a product to a network or machine level, the product list will only present products that are associated with either type.

4. Once the product has been added click on ‘Edit Info’ to populate each data field.

Important: Data may only be entered or modified for one product at a time. When finishing entering or modifying data click ‘Save’ for that specific product.

5. A product may also be removed by clicking on the Delete button.
6. You may sort the listed order for multiple products. Assign each product a hierarchical number in the ‘Sort’ field and save. Products with lower numbers will be listed on top.

Although an added product inherits its ‘Viewable By’ permissions, you may customize a specific client’s product data fields outside of their original global settings by selecting a different permissions dropdown. This does not affect other instances of this product for other clients.

These individually customized permission settings will be overwritten if making a global permissions change to a product (See Note #7 above).