Adding and Associating Products with Tickets

In Zoho Desk, you can manage your company-wide products that are sold or serviced to your customers. Your agents can use the Products module effectively according to their department process. The products added to your help desk can be linked with other modules, such as tickets, contacts, and accounts. Typically, the Product details page contains the product name, product owner, manufacturer name, product code, price, to name a few.

ⓘ **Permission Required**
Users with the **Ticket Permission** administrative profile can access this feature.

[Check Feature Availability and Limits]

Adding Products

You can add your products individually by filling in the details in the product creation form.

To add a new product:

1. Go to **Setup** (⚙) > **Organization** > **Products**.
2. In the *Products List page,* select a **department** to add the product underneath it.
3. Click **New Product** in the upper right corner.
4. In the *Add Product* page, enter the product information.
5. Click **Submit**.
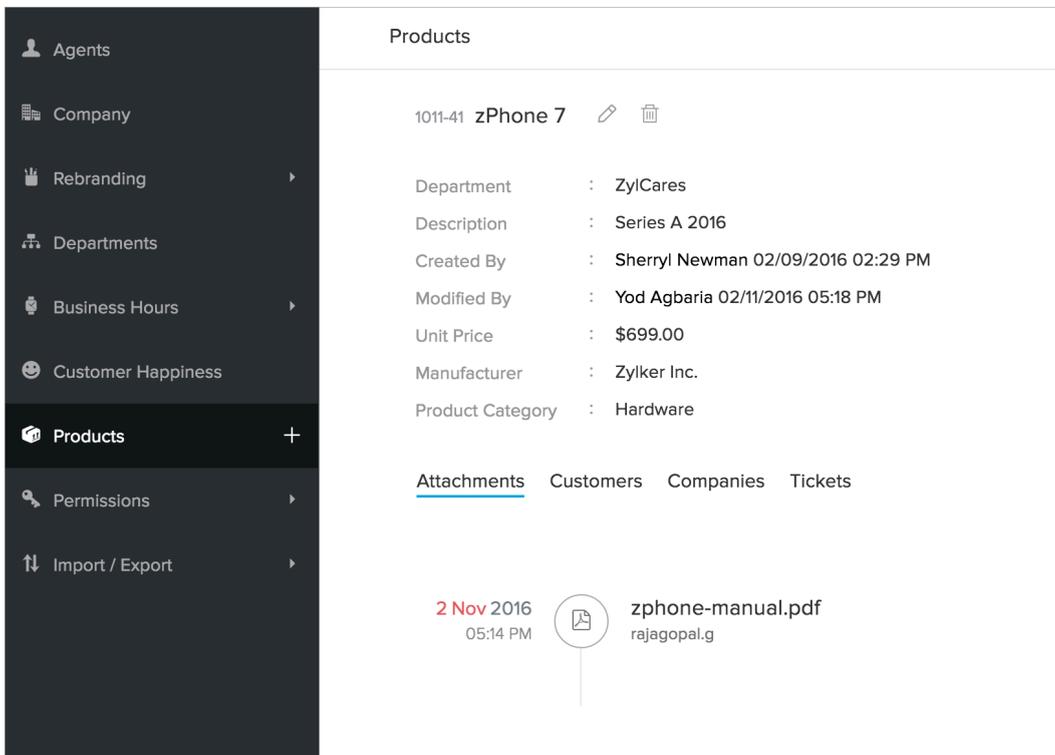
You can click the **edit** (✎) or **delete** (🗑) icon to modify or delete the product from a department.

Product Associates

You can create a 360-degree view of the product to display all the associated details such as attachments, contacts, accounts, and tickets.

To add attachments:

1. **Open** a product to view its details.
2. In the *Product Details* page, click the **Attachments** tab in the bottom of the page.
3. Under the *Attachment* tab, click the **Add** icon (⊕) to browse and select an attachment.

The attachment will display the file name, time stamp and the agent information.

To associate contacts:

1. **Open** a product to view its details.
2. In the *Product Details* page, click the **Contacts** tab in the bottom of the page.
3. Under the *Contacts* tab, click **Associate Contact**.
4. In the *Select Contact* page, **check** the contacts to be associated and click **Associate Contact**.

The selected contact(s) will be associated with the product. You can click the ⊖ icon to dissociate the contact from the product.

To associate accounts:

1. **Open** a product to view its details.
2. In the *Product Details* page, click the **Accounts** tab in the bottom of the page.

3. Under the *Accounts* tab, click **Associate Account**.
4. In the *Select Account* page, **check** the accounts to be associated and click **Associate Account**.

The selected account(s) will be associated with the product. You can click the ⊖ icon to dissociate the account from the product.

To view tickets:

1. **Open** a product to view its details.
2. In the *Product Details* page, click the **Tickets** tab in the bottom of the page.
   You can view the tickets that were added for the product.

You can view all of the tickets or only those that are **Open** or **Overdue**. You can notice that the product related fields are pre-populated in the ticket.

<u>Note:</u>

- You can associate a product with a ticket from the ticket details page only.

Set Display Preferences

By default, Zoho Desk will display only ten products per page. However, you can click [10 ↕] at the bottom of the page to choose the number of products, to be displayed per page. A maximum of 50 products can be viewed at once. The system will remember your selection, the next time you access the product list views.
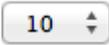
Besides this, you can sort and view the products using the drop-down menu from the top of the products list page. You can sort products based on the following parameters:

- Department Name
- Product Owner
- Product Name
- Product Code
- Unit Price
- Created Time and
- Modified Time

Also, the products in the list view can be sorted in the latest or oldest order. You can click the ↓↑ icon to sort the products by age.

Mass Actions in Product List Views

Product List View allows you to perform certain updates to many products at once. This way, you need not fiddle with each of your product and can save a lot of your time. You can perform the following mass actions on products:

- Update Products

- Delete Products

You can perform the above said bulk actions even to a lone product.

To update one or more product(s):

1. **Select** the product(s) from the list view.
2. Click **Update** from the mass actions menu.
3. Select the field to be updated and specify the new values for it.
4. Click **Save**.

To delete one or more product(s):

1. **Select** the product(s) from the list view.
2. Click **Delete** from the mass actions menu.
3. In the confirmation dialog box, click **Ok**.

The products will be moved to the Recycle Bin.

Predefined and Custom Product Views

Zoho Desk provides a list of pre-defined product views that can be used by your agents out of the box. They can also create a custom view for products based on their requirements. Both the predefined and custom product views can be accessed by selecting the first drop-down in the Product Lists page.
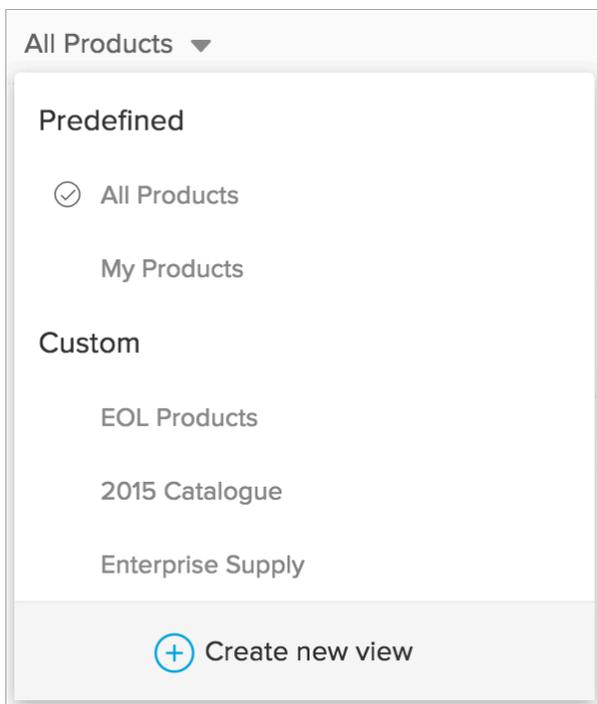
Click the **edit** (✏️) or **delete** (🗑️) icon to **modify** or **delete** a custom product view from a department. You can click the **Add** icon ( ) within the drop-down to add a new custom view for products.