How to Link Products to a Project

This module shows how the Reference owner can bundle one or more References as associated Products with a Project Reference.

General Steps

Step 1. Create a Product Reference

Create references for each of the Products following the standard process of creating References.   Be sure to activate the Product Reference.

Step 2. Create a Project Reference

Create the Project Reference following the standard process and ensure it is active as well.

Step 3. Edit the Project and Link to Products

Edit the Project and add the related Products. Do this by either specifying the Reference Codes or searching by text.

If using the **Code Search**, please note that the number of References returned may be less than the number you typed because:

- You do not own the other References
- References are already created/bundled by another Project
- An invalid Reference Code was entered
- Duplicated Reference Codes were entered (ServCat ignores duplicates)

If using the **Text Search**, only those References that you own will be returned.

Select one or more References to add to the Project.

Removing Products

In general, Products should not be removed from a finalized Project. However, there are some cases when doing so, including removing mistakes, is valid. It is possible to remove each individually or remove all Products.

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