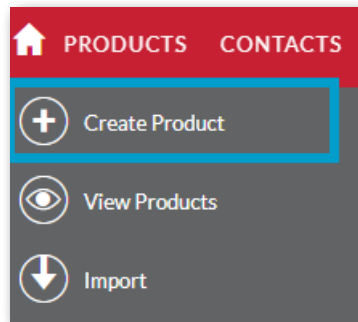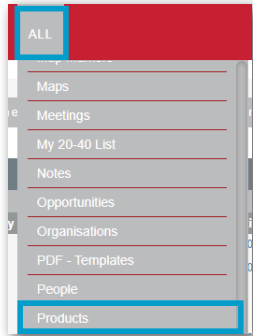# fibreCRM | HEART OF THE PRACTICE

Visit **support.fibrecrm.com** for more info or contact your CRM Manager

Manually Adding Products

1. To manually add products go to **All** in the **Navigation Menu** and select **Products**. In **Products** select **Create Product**.

2. Enter a **Product Name** and a **Price**. You can also enter a **Code** for the product and select a **Product Category** that the product will be related to. You will need to add a **Tax Rate** and **Recurrence**.

3. In **Description,** text added here will be pulled across when added to the line items of an **Opportunity**, and therefore onto **Proposals** and **Engagement Letters**. This can be edited via the **Line Items** editing tool in the **Opportunity** record if required before sending the document if you require it to be unique for certain customers.

4. The **Engagement Letter Description** can be used for **Engagement Letters** and can be more detailed. You can customise and format the **Engagement Description** text in this section using the **Format** and **Tools.**
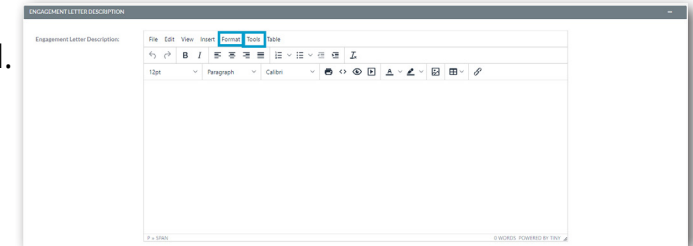
5. Once you filled in all the information about the **Product** you require click **Save and Close**. The **Product** will now be available to select.
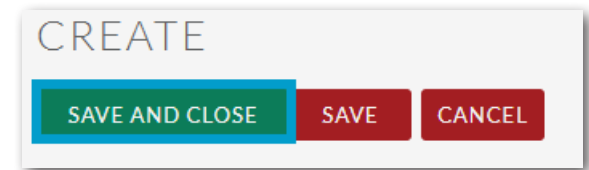
Products Synced From Practice Management

To create products in the CRM, add your product to your practice management system and it will sync across to the CRM.

If you need to view/edit your products go to **All** in the **Navigation Menu** and select **Products**. In the list you can check all of the information that has synched in, this will be the **Product Name** & **Code**.

To edit, select a product from the list and then select **Edit** from the **Actions Menu** of the **Product**. Click **Save and Close** once you've made any changes.