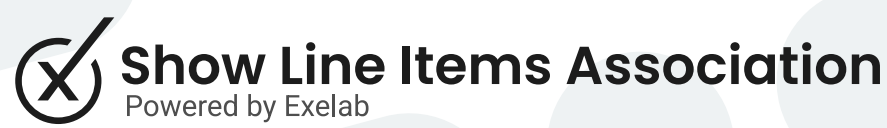
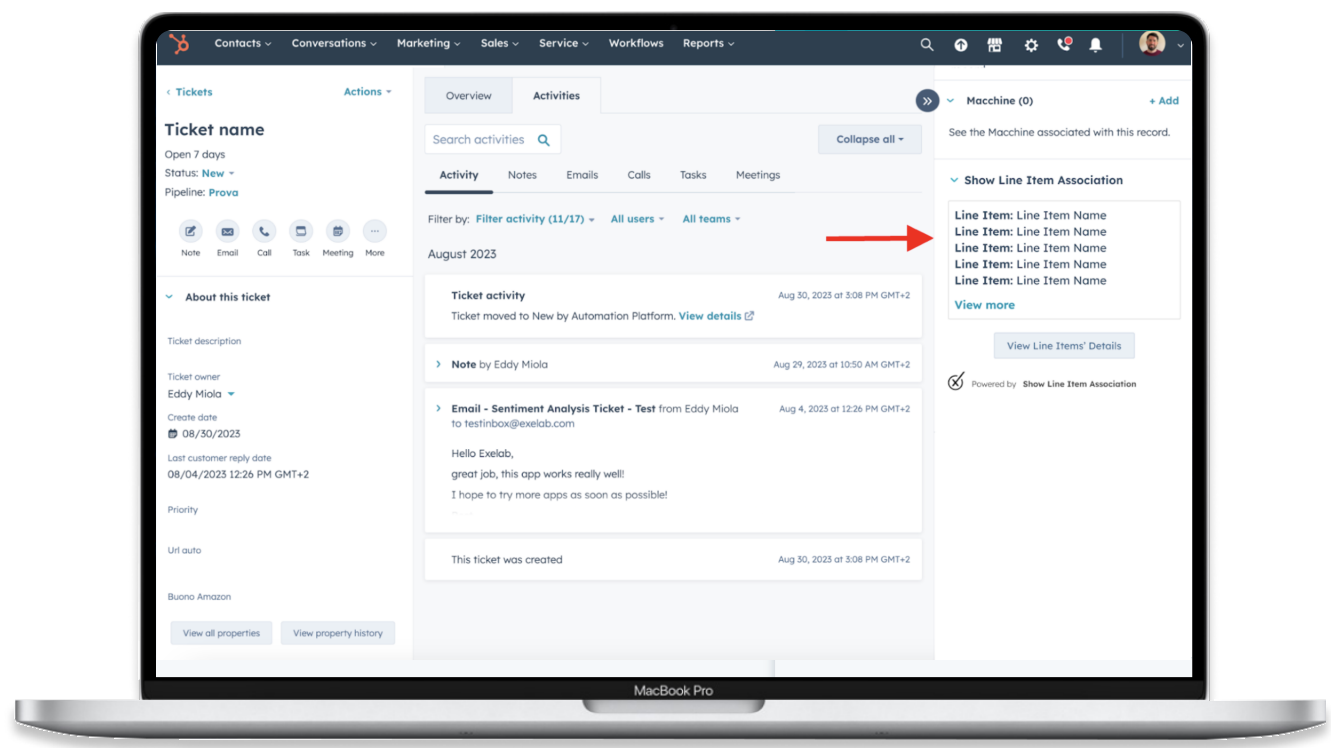


Welcome to



How it works

The Show Line Items Association app allows users to view a list of line items within other objects associated with the deal. It works with Contacts, Companies and Tickets.



Step 1

Enter a record page (it works with contacts, companies, and tickets), make sure to have at least one deal associated with that record.

If there is at least one deal associated with that record you will see a summary of the first 15 line items associated with the deal(s) in the Show Line Items Association’s CRM Card.

Step 2

Only basic information about the line item(s) are provided in the CRM card. To view all the line items information, click the “See details” button in the Show Line Items Association’s CRM card.

Here is a list of associated line items

Show Line Item Association

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DEAL	LINE ITEM	SKU	QUANTITY	NET PRICE	FREQUENCY
Deal Name 1	Line Item Name	4225-776-3234	1	120 €	Monthly
Deal Name 1	Line Item Name	4225-776-3234	4	560 €	One-time
Deal Name 1	Line Item Name	4225-776-3234	3	340 €	One-time
Deal Name 2	Line Item Name	4225-776-3234	2	120 €	One-time
Deal Name 2	Line Item Name	4225-776-3234	1	120 €	Annually
Deal Name 3	Line Item Name	4225-776-3234	1	10 €	One-time

SUMMARY

Total revenue

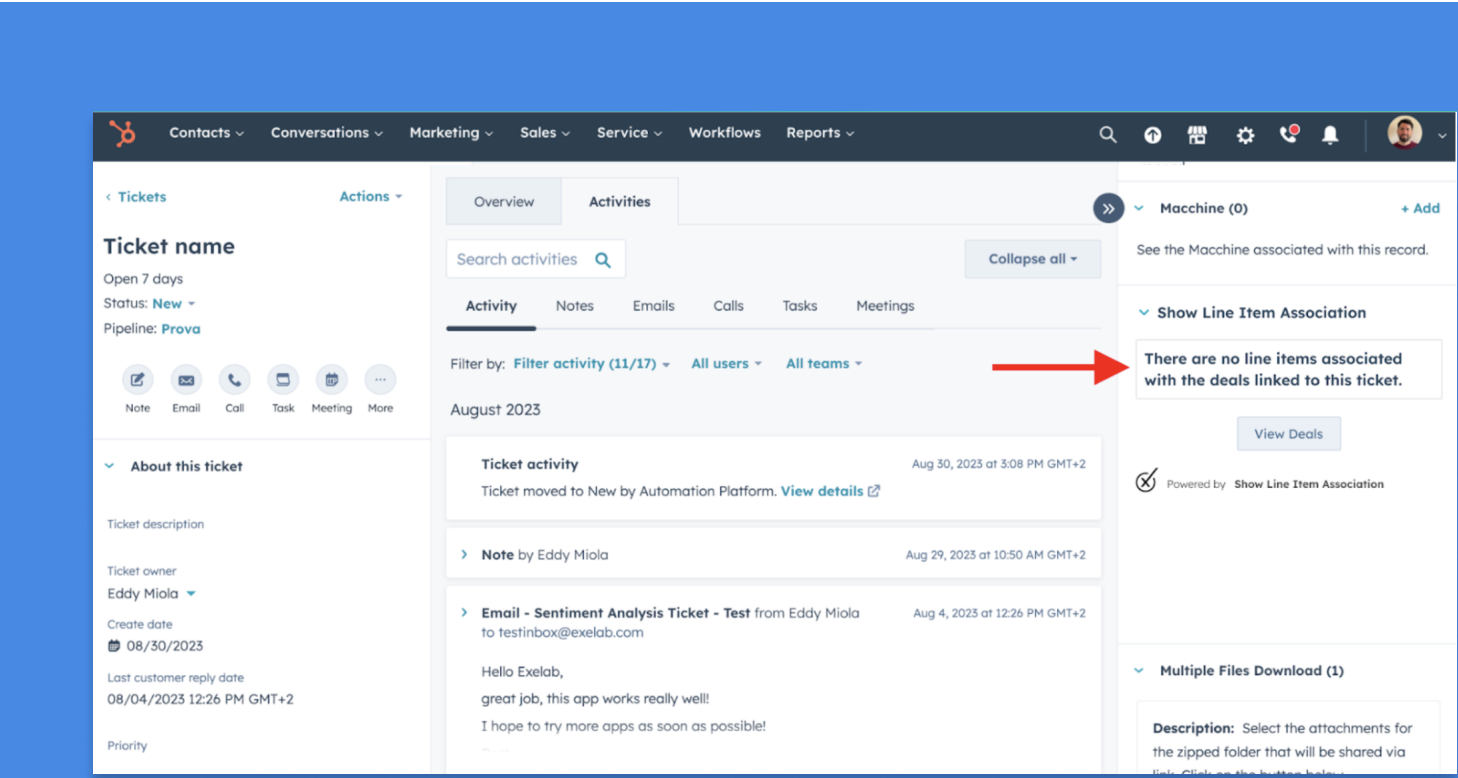
1.290 €

Troubleshooting

1. If a record has no associated deals, the CRM card will report that there are no deals associated.

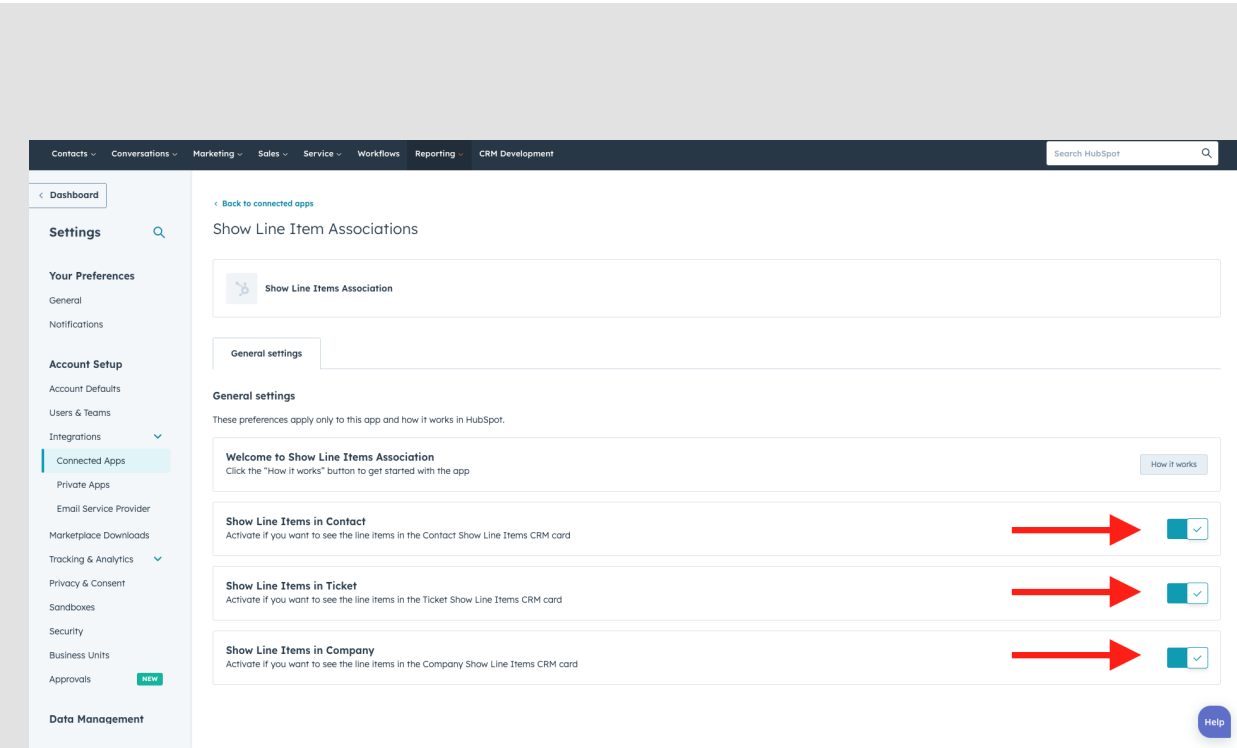
Troubleshooting

2. Ensure that deals have associated line items; otherwise, it won’t be possible to display any line items on the CRM card on the record pages (for contacts, companies, and tickets).



Troubleshooting

3. If a record has one or more associated deals with respective line items but the CRM card does not show any of them, please make sure that the CRM card has been activated for that object from the app settings.



If you need support, please do not hesitate to contact us.

Apps@exelab.com.