





















Sales (Ordered Relations Container)



	Title	First Details	Second Details	Types	Created At	User Updated At	
	Sales Deals			Query Container	9/29/2021, 3:34:08 PM	9/29/2021, 3:34:08 PM	
	Sales Quotes			Query Container	9/29/2021, 3:34:08 PM	9/29/2021, 3:34:08 PM	
	Sales Orders			Query Container	9/29/2021, 3:34:08 PM	9/29/2021, 3:34:08 PM	
	Sales Invoices			Query Container	9/29/2021, 3:34:08 PM	9/29/2021, 3:34:08 PM	
	Sales Price Lists			Query Container	9/29/2021, 3:34:08 PM	9/29/2021, 3:34:08 PM	
	Sales Transfers			Query Container	9/29/2021, 3:34:08 PM	9/29/2021, 3:34:08 PM	
	Products and Services			Query Container	9/29/2021, 3:34:08 PM	9/29/2021, 3:34:08 PM	
	Sales Contracts			Query Container	9/29/2021, 3:34:08 PM	9/29/2021, 3:34:08 PM	
	Leads			Query Container	9/29/2021, 3:34:08 PM	9/29/2021, 3:34:08 PM	
	Customers			Query Container	9/29/2021, 3:34:08 PM	9/29/2021, 3:34:08 PM	

List view

Products and Services (Query Container)

Create New Product

Create New Service













or following the general rule for creating object

- Create New ▾ My Ar
- Contact
 - Project
 - Task
 - Folder
 - Category
 - Document
 - Image
 - Video
 - User
 - Group
 - Other

Select Type □ ×

product

5/5   |   

				
Product	Purchase Product	Purchase-Sales Product	Sales Product	Product Stock

Depending on the purpose of the product/service it can be for Purchase only (Purchasing product), for Sale only (Sales product) or for both (Purchase-Sales Product)

When the New Object Window opens, some Common Details for all kind of products can be defined.

Standard edit ▾

Collaborators: administrator

Suppliers **Supplier** **Recommended Purchase Price** **Standard Discount**

Add New Product Supplier

Stock Type * Unit name *

Ref. Name

Name *

Description **B I U S A**

Image

Sales Accountancy Code Sales Accountancy Code Purchase Accountancy Code Purchase Accountancy Code

A supplier can be added pressing on the **Add New Product Supplier**

Supplier can be chosen by the Options that appear when clicked on the empty field near Supplier*

Suppliers **Supplier** **Recommended Purchase Price** **Standard Discount**

Type: Product Supplier

Supplier *

Recommended Purchase Price **Supplier International**
 Supplier Local

Standard Discount Amount Amount Percent %

Add New Product Supplier

Then the Currency options appear by clicking directly on the text Currency

Supplier International

Type: Product Supplier

Supplier * Supplier International

Recommended Purchase Price Currency ▼ Amount

Standard Discount

EUR





BGN

USD

Change Values

Q

And the price is written in the next field

Suppliers	Supplier	Recommended Purchase Price	Standard Discount
	Supplier International	€250.00	 
	Type: Product Supplier		
	Supplier *	Supplier International	
	Recommended Purchase Price	EUR ▼ 250	
	Standard Discount	Amount	Amount Percent %

Add New Product Supplier

Then discounts can be described in fixed amount and/or percentage

If another Supplier needs to be added, that can be done in the similar way by pressing the below the already defined supplier details

The details: [Stock type](#), Unit name and Name are mandatory (marked with *). Other details are optional. In order to align with the accountancy papers, there is an option to put as details Purchase Accountancy Code and Sales Accountancy Code.

The process is finished by pressing button **Create** at the bottom of the screen.

Standard edit

Collaborators: administrator



Suppliers	Supplier	Recommended Purchase Price	Standard Discount
	Supplier International	€250.00	

Add New Product Supplier

Stock Type * Unit name *

Ref. Name

Name *

Description

Image

Sales Accountancy Code Purchase Accountancy Code

Containers

Relations

Sub-Products

And this is how the Product Page looks like:

Last modified by administrator on 2023-08-01 10:00:00

Single Stock 1
S_Stock1

Charts

Properties

Suppliers:

Supplier	Recommended Purchase Price	Standard Discount
Supplier International	€250.00	

Stock Type [Single Stock](#)

Purchase Accountancy Code:
Ref. Name: S_Stock1
Name: Single Stock 1
Description:
Unit name: pc
Image:
Quantity Calculator:
Tasks Template:
Data to Copy to Template:
Sales Accountancy Code:
Sub-Products:
Containers:

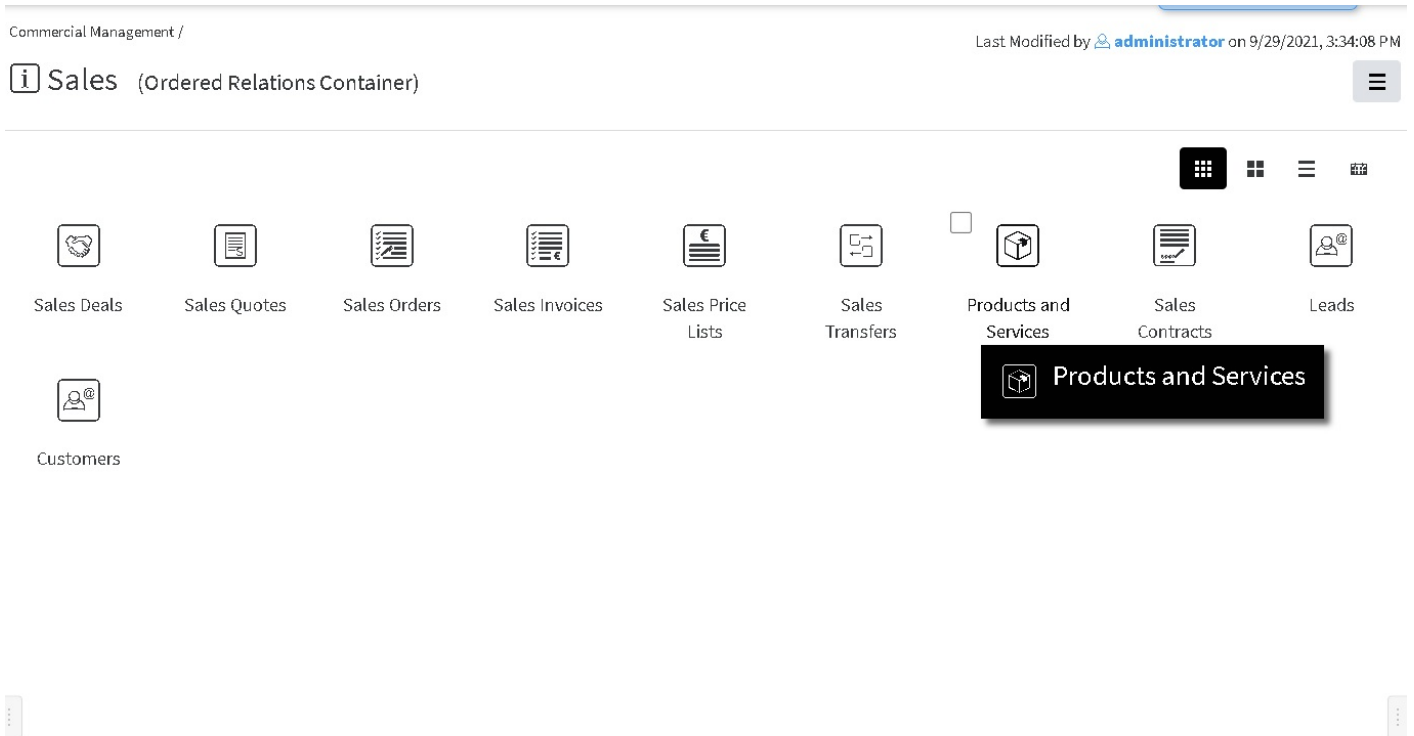
Activities

Types

here are 3 zones - Charts, Properties, Activities, that can be expanded or hidden by pressing the ^ at the end of the rows


Creating New Service

Similarly to creating a new Product, this can be done directly from **Commercial Management, Products and Services** Container, which can be found in each **Sales, Purchases, Inventory** Containers



using the corresponding buttons

Commercial Management / Inventory /

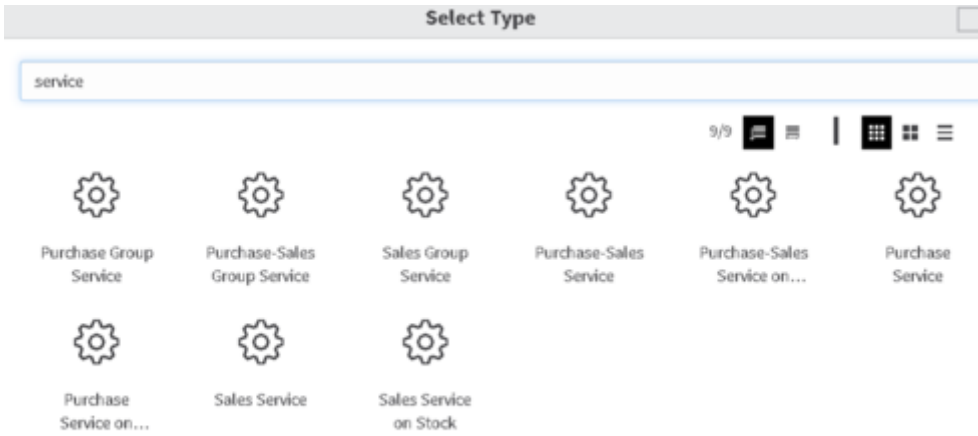
 **Products and Services** (Query Container)

Create New Product

Create New Service



or following the general rule for creating object



Depending on the purpose of the service, there are several types of services and each has their sales, purchase, or purchase-sales variant.

Service - used for any services, apart from the below two cases.

Group service - used for many stocks, serviced under one contract with same conditions

Service on stock - used for service (for example maintenance) on the specific stock. When defining, the product on which that service will be applied should be specified mandatory.

Last Modified by [administrator](#) on 10/28/2021, 4:27:23 PM

[i] Service on Stock Maintenance Yearly (Draft-PurchaseMixin-SalesMixin-ServiceOnStock) ☰

Standard edit ▾ Collaborators: administrator

Name * +

Ref. Name +

Description

Unit name * +

Image

Sales Accountancy Code Purchase Accountancy Code

Containers

Relations

Product *

The process is finished by pressing button **Create** at the bottom of the screen.

i Service on Stock Maintenance Yearly (Purchase-Sales Service on Stock)



Properties



Purchase
Accountancy Code:
Ref. Name: SEStock_maintenance_Y
Name: Service on Stock Maintenance Yearly
Description:
Unit name: year
Image:
Quantity Calculator:
Tasks Template:
Data to Copy to
Template:
Sales Accountancy
Code:
Product: **Single Stock 1**
Containers:

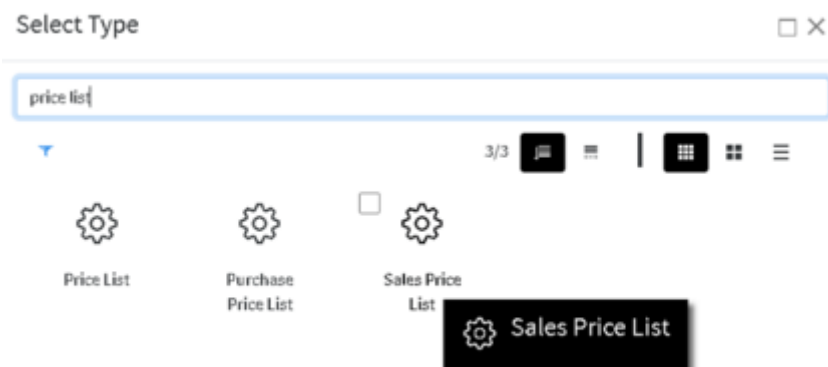
Relations



Title	Created At	User Updated At
No Relations		

Creating Price list

Creating New Price list can be done via Create New - Other and selecting Sales or Purchase Price List



Let's chose Sales Price List, then the following screen appears

Standard edit

Collaborators: administrator

Name * EUR Sales Price list

Description

Currency * EUR

Price List Items *	Sellable	Recommended Price	Minimum Price	Discount
Add New Sales Price List Item				

Containers

Cancel Save Draft (3) Create

To add an Item in the list just press on **Add New Sales Price List** Item a and the new area will appear


Price List Items *	Sellable	Recommended Price	Minimum Price	Discount
✎ ✕				
Type: Sales Price List Item				
	Sellable *			
	Recommended Price *	Recommended Price		
	Minimum Price *	Minimum Price		
	Discount	Amount	Amount	Percent %
Add New Sales Price List Item				





On a Sellable field available products or services should appear as options and one can be chosen to be included in the list

Price List Items *	Sellable	Recommended Price	Minimum Price	Discount
✎ ✕				
Type: Sales Price List Item				
	Sellable *			
	Recommended Price *	<ul style="list-style-type: none"> Single Stock 1 Service on Stock Maintenance Yearly 		
	Minimum Price *	Minimum Price		
	Discount	Amount	Amount	Percent %
Add New Sales Price List Item				

Recommended price and Minimum Price should be defined, as well as Discount amount or percent.

Another sellable item can be added by **Add New Sales Price List**.

By the pencil button  the details for each item can be shown or hidden.

Price List Items*	Sellable	Recommended Price	Minimum Price	Discount
	Single Stock 1	200	100	 
	Service on Stock Maintenance Yearly	50	25	 

[Add New Sales Price List Item](#)

Once all details are defined, process is finished by Create button.

Last Modified by [administrator](#) on 11/2/2021, 7:13:57 PM

EUR Sales Price list (Sales Price List)

Properties

Name: EUR Sales Price list
Description:
Currency: EUR

Price List Items:

Sellable	Recommended Price	Minimum Price	Discount
Single Stock 1	200	100	
Service on Stock Maintenance Yearly	50	25	



Containers:


Relations

Title	Created At	User Updated At
No Relations		

Activities

Types: Comment Activity

B I U   ...

Add a Comment 

Revision #2

Created 15 November 2024 14:35:50 by Pierre

Updated 15 November 2024 19:35:50 by Pierre