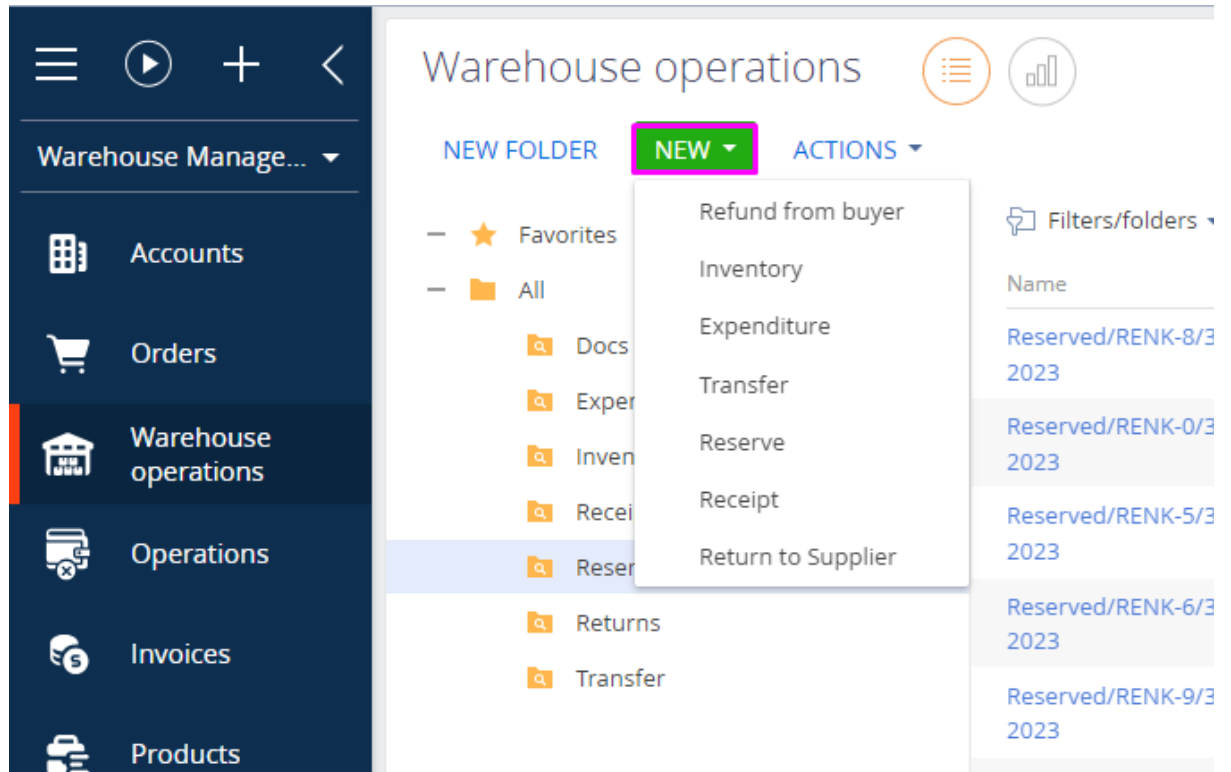


# Instruction for Storekeeper for Creatio

## Work description

The movement of goods is carried out only in the divisions of the warehouse.



Warehouse operations and accounting of goods are carried out according to the places of the warehouse. Warehouse places are realized in the "Storage space grid" reference book according to the declared "coordinates" - Row, Sector, Floor, Place. Each place has purpose (directory), a warehouse, an occupied/free sign.

Lookups What can I do for you? > Creatio 8.0.4.1870

NEW CLOSE ACTIONS ▾ VIEW ▾

Storage space grid

Filters/folders ▾

Name	Place number	Row	Sector	Floor	Place	Purpose	Warehouse...
1/1-1/2	2	1	1	1	2		East War...
1/1-1/1	1	1	1	1	1		Central ...
1/1-1/3	3	1	1	1	3		
1/3-1/3	11	1	1	1	3		
1/2-1/1	5	1	2	1	1		
1/3-1/4	12	1	1	1	4		
1/3-1/2	10	1	3	1	2		
1/3-1/1	9	1	3	1	1		
1/2-1/2	6	1	2	1	2		

## 1. Workplace, sections

Warehouse operations ☰ 📊

NEW FOLDER NEW ▾ ACTIONS ▾

Warehouse Manage... ▾

- Accounts
- Orders
- Warehouse operations
- Operations
- Invoices
- Products

☑ Favorites

☑ All

- Docs Warehouse
- Expenditure
- Inventory
- Receipt
- Reserve ★ ⚙️
- Returns
- Transfer

Filters/folders ▾ 🔍 Rese

Name

- Reserved/RENK-8/30-01-2023
- Reserved/RENK-0/30-01-2023
- Reserved/RENK-5/30-01-2023
- Reserved/RENK-6/30-01-2023
- Reserved/RENK-9/30-01-2023
- Reserved/RENK-2/30-01-

The "Warehouse Management" workplace is configured.

The main sections:

1.1 Orders

1.2 Warehouse operations

1.2.1 Document "Receipt"

1.2.2 Document "Expenditure"

1.2.3 Document "Reserve"

1.2.4 Document "Refund from buyer"

1.2.5 Document "Return to supplier"

1.2.6 Document "Transfer"

1.2.7 Document "Inventory"

1.3 Invoices

1.4 Products

1.5 Deliveries

1.6 Routes

1.7 Production

1.8 Price settings

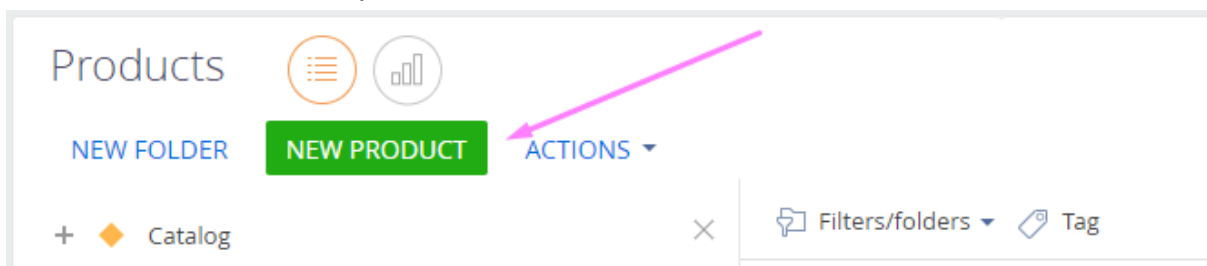
## Work with the Warehouse

### Note:

- If there are no values in the directory, fill it
- If there are no Accounts or Contacts, then create them

### Products section

1. Open the "Products" section
2. Click on the "New product" button




Expected result: The product page opens

New record

What can I do for you? >

SAVE CANCEL ACTIONS

 Name\* \_\_\_\_\_  
 Barcode \_\_\_\_\_ Maintain accounting by series \_\_\_\_\_  
 Minimum balance \_\_\_\_\_ Current remaining days \_\_\_\_\_

< GENERAL INFORMATION INFORMATION FOR LOGISTICS ATTACHMENTS AND NOTES FEATURES PRICES AND AVAILABILITY FEED

Base price  
 Price, \$ \_\_\_\_\_ Tax VAT 20% \_\_\_\_\_ Unit of measure\* pieces \_\_\_\_\_

Units + :  
 Name ^ Short name Default unit Number of base units

Segmentation  
 Category \_\_\_\_\_ Brand \_\_\_\_\_  
 Type \_\_\_\_\_

Additional Product Parameters  
 Provider \_\_\_\_\_ Owner Supervisor  
 Code \_\_\_\_\_ Inactive   
 Link \_\_\_\_\_


3. Fill in the fields in the header of the product page:

Field	Value	Note
Name	Apple iPhone 14 Pro	Enter a name
Barcode	126923	Enter the product barcode
Maintain accounting by series	True	Checkbox
Minimum balance	10	Enter a number
Current remaining days		Auto

Apple iPhone 14 Pro

WR

SAVE CANCEL ACTIONS

 Name\* Apple iPhone 14 Pro  
 Barcode 126923 Maintain accounting by series   
 Minimum balance 10 Current remaining days \_\_\_\_\_

4. Fill in the tab "GENERAL INFORMATION"

Field	Value	Note
Base price		

Price, \$	1200.00	Enter a number
Tax	VAT 20%	Enter the tax by choosing a value from the guide
Unit of measure	pieces	Enter the unit of measurement of the product
<b>Segmentation</b>		
Category	Software	Selection from the directory
Brand	Apple	Selection from the directory
Type		Selection from the directory
<b>Additional Product Parameters</b>		
Provider	IT Market	Directory "Accounts"
Code	14Pro	Enter the product code
Link	<a href="https://appleroom.ua/product/apple-iphone-14-pro-128-gb-space-black/">https://appleroom.ua/product/apple-iphone-14-pro-128-gb-space-black/</a>	Enter the product link
Owner	Supervisor	Autocomplete
Inactive	No	Checkbox

[GENERAL INFORMATION](#)
[INFORMATION FOR LOGISTICS](#)
[ATTACHMENTS AND NOTES](#)
[FEATURES](#)
[PRICES AND AVAILABILITY](#)
[FEED](#)

---

Base price  
 Price, \$  Tax  Unit of measure\*

Units + :  
 No data

Segmentation  
 Category  Brand   
 Type

Additional Product Parameters  
 Provider  Owner   
 Code  Inactive   
 Link

Components in the product + :  
 No data

5. Fill in the tab "INFORMATION FOR LOGISTICS"

Field	Value	Note
Weight, kg	0.18	Enter a number
Volume (cubic meter)	0.7	Enter a number
Based on the unit of measurement	pieces	Enter the unit of measurement of the product

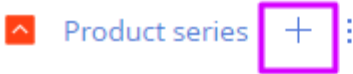
< GENERAL INFORMATION INFORMATION FOR LOGISTICS ATTACHMENTS AND NOTES FEATURES PRICES AND AVAILABILITY FEED

Weight, kg 0.18

Volume (cubic meter) 0.70

Based on the unit of measurement pieces

## 6. Fill in the tab "FEATURES"

Field	Value	Note
<b>Product series</b>		
		
Series	3200	Enter a number
Product	Apple iPhone 14 Pro	Autocomplete
Description	Apple iPhone 14 Pro 256GB Silver (MQ103)	Specify the product description
Barcode	3222	Enter a number
Location	In stock	Specify the location of the product
<p>Apple iPhone 14 Pro / Product series <span style="float: right;">What can I</span></p> <p> <input type="button" value="SAVE"/> <input type="button" value="CANCEL"/> <input type="button" value="CREATE PRODUCT"/> </p> <hr/> <p> Series 3200 <span style="float: right;">Barcode 3222</span>  Product* Apple iPhone 14 Pro <span style="float: right;">Location In stock</span>  Description Apple iPhone 14 Pro 256GB Silver (MQ103) </p>		
<b>Features</b>		

Features + :

Product	Apple iPhone 14 Pro	Autocomplete
Feature	Weight, lb	Selection from the "Features" directory
Value	0.18	The field appears according to the selected option from the "Feature" field

Apple iPhone 14 Pro / Product feature

SAVE CANCEL

Product\* Apple iPhone 14 Pro

Feature\* Weight, lb

Value 0.18

< GENERAL INFORMATION INFORMATION FOR LOGISTICS ATTACHMENTS AND NOTES FEATURES PRICES AND AVAILABILITY FEED

Product series + :

Series	Barcode	Description	Location
51214	51214	Apple iPhone 14 Pro 512GB Space Black (MQ1M3)	In stock
3200	3222	Apple iPhone 14 Pro 256GB Silver (MQ103)	In stock

Features + :

Name	Value
Weight, lb	0.18

## 7. Switch to the "PRICES AND AVAILABILITY" tab

< GENERAL INFORMATION INFORMATION FOR LOGISTICS ATTACHMENTS AND NOTES FEATURES PRICES AND AVAILABILITY FEED >

Expected result:

- In the "Remaining stock" detail, all warehouses with "0" remaining stock have been added

Remaining stock + :

Warehouse	In stock	Reserved	On hand
West Warehouse	0.000	0.000	0.000
East Warehouse	0.000	0.000	0.000
Central Warehouse	0.000	0.000	0.000
Regional Warehouse	0.000	0.000	0.000

- In the "Product prices" detail, all price lists with the price "0" were added, except for "Base"

Product prices + :

Price list	Price	Currency	Tax
Base	3,000.00	US Dollar	VAT 18%
Partner Platinum	0.00	US Dollar	VAT 18%
Procurement	0.00	Euro	VAT
Wholesale	0.00	Euro	VAT
Partner Silver	0.00	US Dollar	VAT
Partner Bronze	0.00	US Dollar	VAT
Management	0.00	Ruble	VAT
Retail-Dollar	0.00	US Dollar	VAT

### 8. In details "Product prices" fill in the prices

Product prices + :

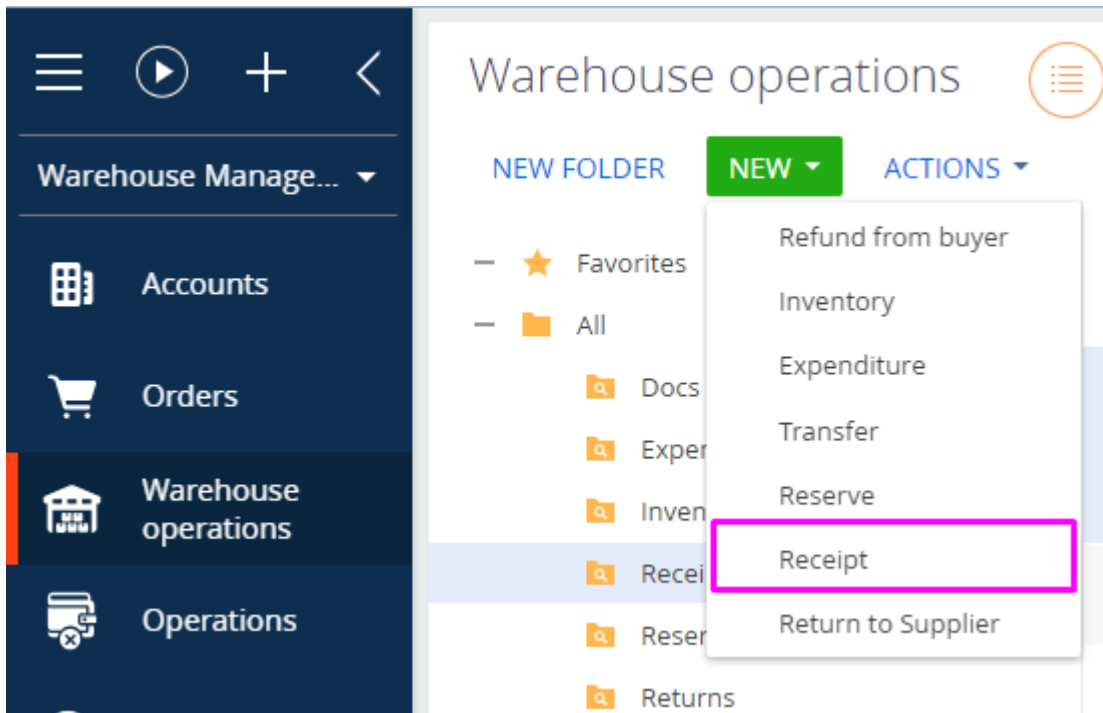
Price list	Price	Currency	Tax
Partner Silver	1,100.00	US Dollar	VAT 20%
Partner Platinum	1,050.00	US Dollar	VAT 20%
Base	1,200.00	US Dollar	VAT 20%
For Distributors	1,000.00	US Dollar	VAT 20%
New 1	1,100.00	US Dollar	VAT 20%
Retail-Dollar	1,175.00	US Dollar	VAT 20%
Partner Bronze	1,150.00	US Dollar	VAT 20%
For partners	1,100.00	US Dollar	VAT 20%
Management	1,150.00	Ruble	VAT 20%
Wholesale	900.00	Euro	VAT 20%

Show more

### 9. The balance of the product in the warehouse was made using "Warehouse operations - Receipt"

But you can manually add it at the beginning

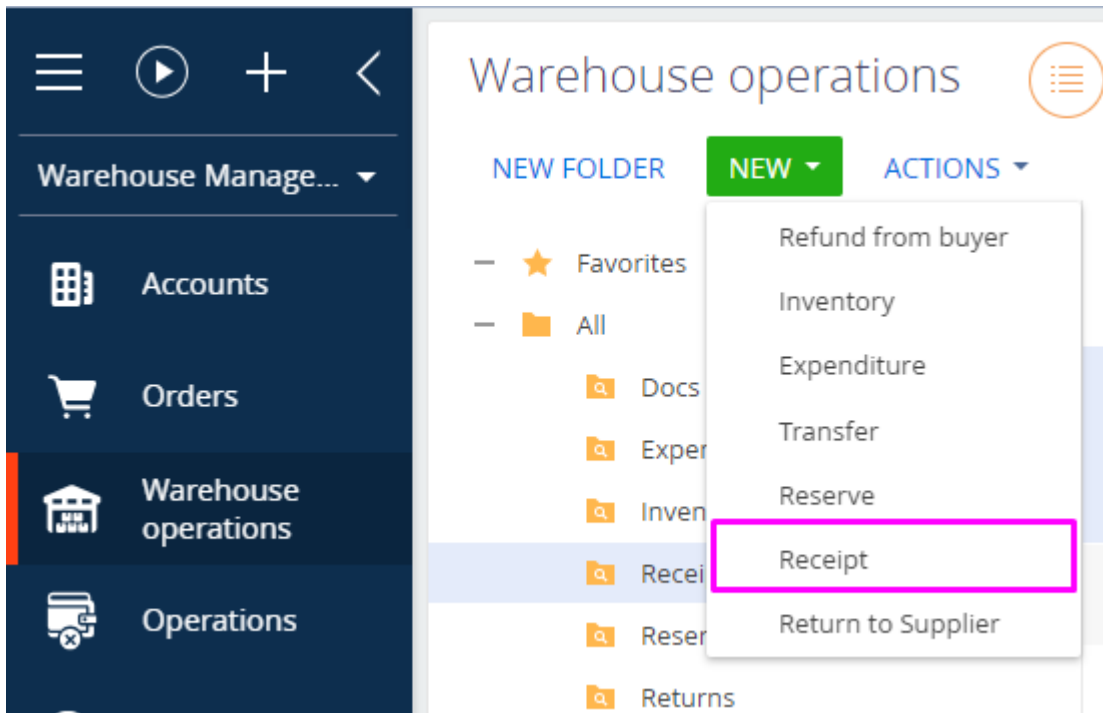




### Section "Warehouse Operations - Receipt"

**Note:** the "Receipt" section for the arrival of products in warehouses.

1. Open the "Warehouse operations" section
2. Click on the "New" button and select "Receipt"



Expected result: The "Receipt" page will open

New record What can I do for you? > **Creatio**

**SAVE** CANCEL ACTIONS PRINT VIEW

---

Number _____	Type Receipt _____	Name _____
Order _____	Date 7/17/2023 _____	
Provider _____	Warehouse* _____	Conducted <input type="checkbox"/>
Our company* Our company	Parental Document _____	Official <input type="checkbox"/>
Price List* Procurement	Amount _____	Currency Rate _____
	Primary Amount _____	Currency US Dollar

3. Fill in the fields in the header of the page:

Field	Value	Note
Number	PN-23	Autocomplete after saving
Order		Autocomplete if created from an order
Provider	Excellence Marketing	Directory "Accounts"
Our company	Our company	Autocomplete
Price list	Procurement	Autocomplete
A type	Receipt	Autocomplete
Date	1/24/2023	Autocomplete

Stock	Central Warehouse	Selection from the drop-down list
Parent document		It is being filled
Amount	52500.00	Populates when products are added
The sum b.c.	1346.15	Populates when products are added
Name	Arrival/PN-23/02-02-2023	Autocomplete after saving
Course	39,00	Enter a number
Currency	US Dollar	Autocomplete
Conducted	No	Checkbox
Service	No	Checkbox

Receipt/PRNK-0/30-01-2023

What can I do for you? >



**SAVE** CANCEL **CLOSE** ACTIONS ▾

PRINT ▾ VIEW ▾

Number	PRNK-0	Type	Receipt	Name	Receipt/PRNK-0/30-01...
Order		Date	1/30/2023		
Provider	Precision Systems	Warehouse*	Regional Warehouse	Conducted	<input type="checkbox"/>
Our company*	Our company	Parental Document		Official	<input type="checkbox"/>
Price List*	Base	Amount	24,000.00	Currency Rate	1.00
		Primary Amount	24,000.00	Currency	US Dollar

4. Click on "Save"

## New record

SAVE

CANCEL

ACTIONS ▾



Number

Order

Provider Precision Systems

Our company\* Our company

Par

Price list\* Procurement

Expected result: The "Number" and "Name" fields have been filled

Receipt/PRNK-0/30-01-2023

What can I do for you? >

Creatio

SAVE

CANCEL

CLOSE

ACTIONS ▾



PRINT ▾

VIEW ▾

Number PRNK-0

Type Receipt

Name Receipt/PRNK-0/30-01...

### 5. Add a product

- Add through "+", selecting the required product, the filter is not in stock

< PRODUCTS

OPERATIONS

ATTACHMENTS AND NOTES

FEED



Product



Product selection

No data



Product

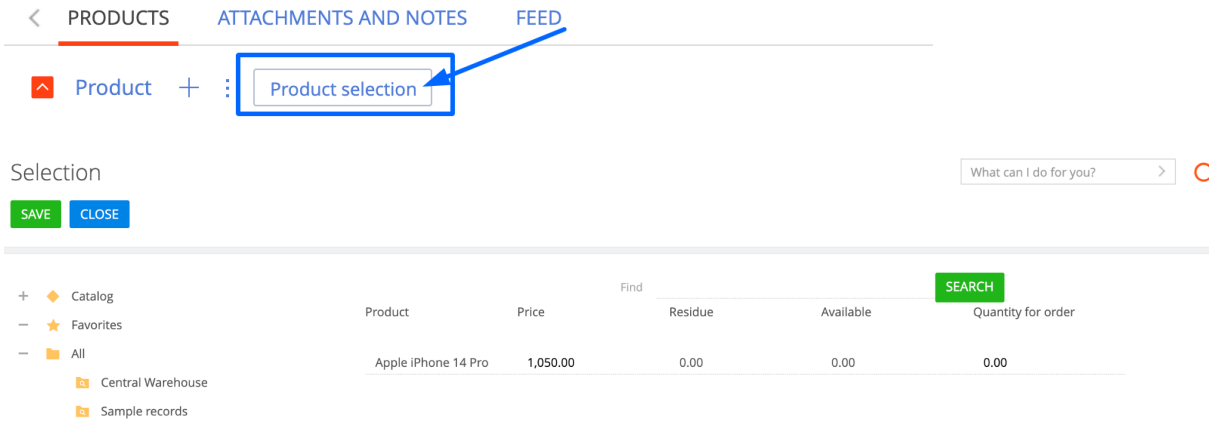


Product selection

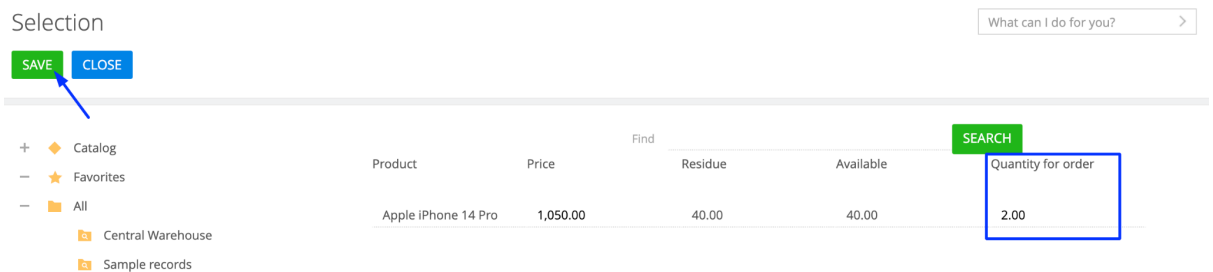
Barcode	Product	Series	Warehou...	Number ...	Quantity	Price (wit...	T...	Tax amount	Discount...	Total (wit...
					0.000	0.00	20...	0.00	0.00	0.00



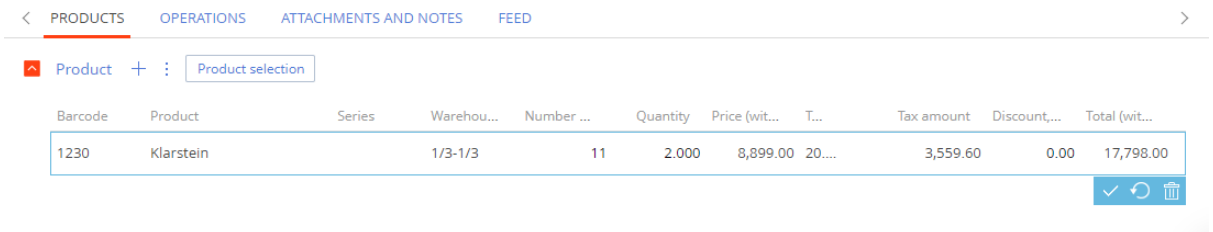
- Add via the "Product selection" button, all products in the selected Warehouse are displayed



## 6. Choose a product, specify the quantity and save



## 7. Fill in the columns in the "Product" details



Expected result: The fields are filled "Amount" and "The sum b.c."

Amount 52,500.00

The sum b.c. 1,346.15

## 8. When the products are added, activate the "Conducted" checkbox and save the page

Receipt/PRNK-0/30-01-2023 What can I do for you? Creatio

**SAVE** CANCEL **CLOSE** ACTIONS

PRINT **VIEW**

---

Number PRNK-0 Type Receipt Name Receipt/PRNK-0/30-01...

Order Date 1/30/2023

Provider Precision Systems Warehouse\* Regional Warehouse

Our company\* Our company Parental Document

Price List\* Base Amount 24,000.00 Currency Rate 1.00

Primary Amount 24,000.00 Currency US Dollar

**Conducted**

Official

Expected result:

- Products will become unclickable

< PRODUCTS OPERATIONS ATTACHMENTS AND NOTES FEED >

Products + : Product selection

Barcode	Product	Series	Warehou...	Number ...	Quantity	Price (wit...	T...	Tax amount	Discount,...	Total (wit...
	Air Pods			0	5.000	120.00	20.00	100.00	0.00	600.00

- On the product page, the delivery quantity is displayed in the "Remaining stock" detail

Remaining stock + :

Warehouse	In stock	Reserved	On hand
Central Warehouse	1,002.000	0.000	1,002.000
Regional Warehouse	0.000	0.000	0.000
East Warehouse	4,600.000	0.000	4,600.000

- On the product page, the created Warehouse operation is displayed in the "Motion" detail

Motion :

Warehouse operation	Account	Stock	Conducte...	Quantity	Product	Created on
Arrival/PRNK-65/23-02-2023	Precision Systems	Central Warehouse	Yes	2.000	Klarstein	2/23/2023 1:59 PM

- On the product page, in the "Remaining storage space" detail, free storage space is displayed

Remaining storage space + :

Product	Residue	Reserved	Available	Warehouse	Warehouse locat...	Place nu...	Created on	Modified ...
Klarstein	2.000	0.000	2.000	Central Warehouse	1/3-1/3	11	2/23/2023 2:01 ...	2/23/202...
Klarstein	600.000	0.000	600.000	East Warehouse	1/3-1/4	12	2/9/2023 2:43 PM	2/9/2023...
Klarstein	600.000	0.000	600.000	East Warehouse		0	2/9/2023 2:40 PM	2/9/2023...
Klarstein	1,000.000	0.000	1,000.000	Central Warehouse	1/2-1/1	5	2/9/2023 12:44 ...	2/9/2023...
Klarstein	4,000.000	0.000	4,000.000	East Warehouse	1/1-1/4	4	2/9/2023 12:34 ...	2/9/2023...

Note:


1. ["Receipt" can be created from an order](#)




2. **"Receipt" can be created from Inventory** ( **"Receipt"** is created if there was a product shortage in the inventory)

**Creation "Return to Supplier" from the Receipt**

**Note:** the return of warehouse goods from "Receipt" back to the Supplier

1. The completed "Receipt" page with added products and "Conducted" page is open

Receipt/PRNK-1/30-01-2023 What can I do for you? > 


CANCEL **CLOSE** ACTIONS  PRINT  VIEW 

---

Number	PRNK-1	Type	Receipt	Name	Receipt/PRNK-1/30-01...
Order		Date	1/30/2023	Conducted	<input checked="" type="checkbox"/>
Provider		Warehouse*	Central Warehouse	Official	<input checked="" type="checkbox"/>
Our company*	Our company	Parental Document	Moving/PERNK-0/30-01-2023	Currency Rate	1.00
Price List*	Base	Amount	600.00	Currency	US Dollar
		Primary Amount	600.00		

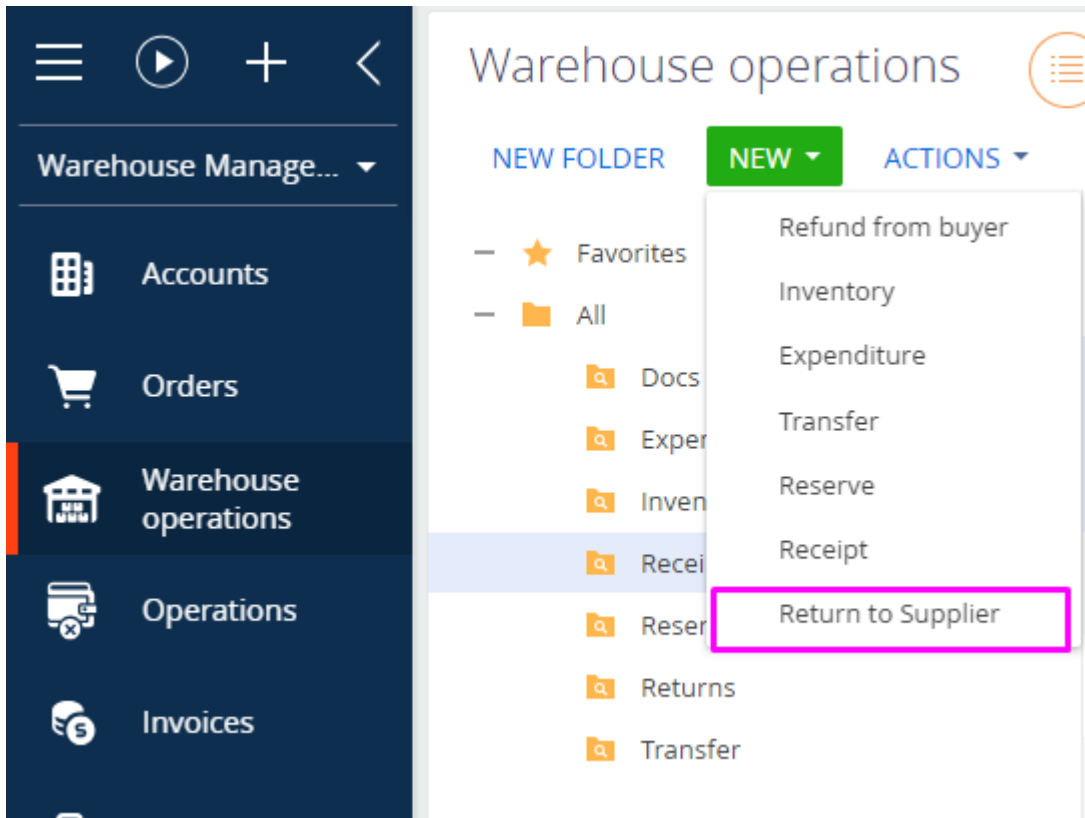
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< PRODUCTS OPERATIONS ATTACHMENTS AND NOTES FEED >

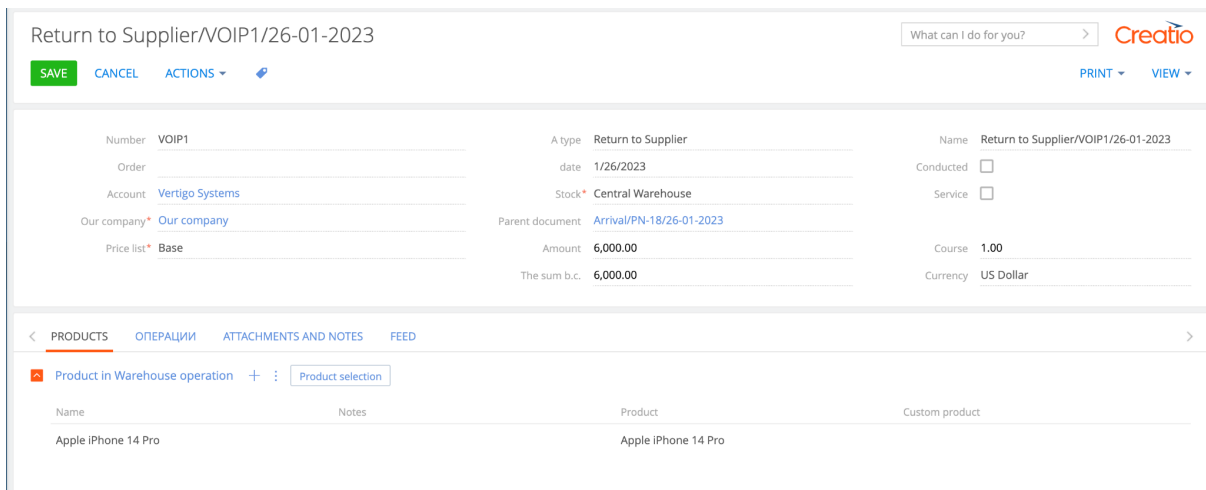
 Products +

Barcode	Product	Series	Warehou...	Number ...	Quantity	Price (wit...	T...	Tax amount	Discount,...	Total (wit...	
	Air Pods				0	5.000	120.00	20.00	100.00	0.00	600.00

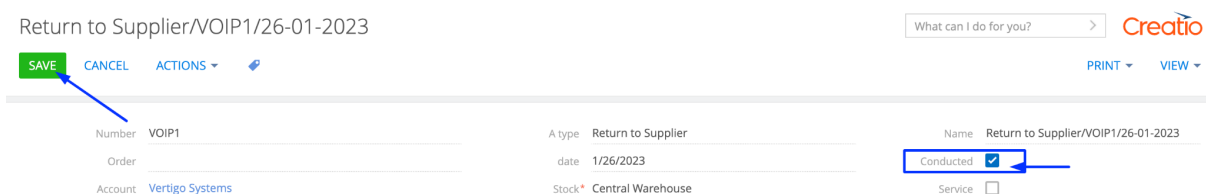
2. Click on "Actions", select "Create Return to Supplier"



Expected result: the "Return to Supplier" page opens, where all fields are filled, and the product from the Arrival is added



3. When the products are added, activate the "Conducted" checkbox and save the page



Expected result:

- Products will become unclickable



Product in Warehouse operation + : Product selection

Name	Notes	Product	Custom product
Apple iPhone 14 Pro		Apple iPhone 14 Pro	

- On the product page, the delivery quantity is displayed in the "Central Warehouse" detail

Remaining stock + :

Warehouse	In stock	Reserved	On hand
Central Warehouse	35.000	0.000	35.000

- On the product page, the created Warehouse operation is displayed in the "Motion" detail

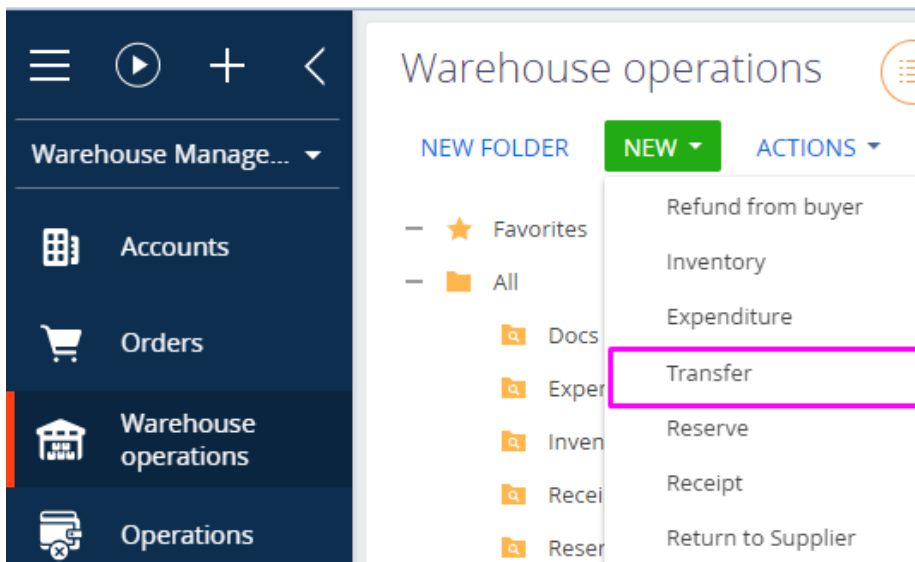
Motion :

Warehouse operation	Stock	A type	Series	Conducted	Quantity	Modified on
Return to Supplier/VOIP2/26-01-2023	Regional Warehouse	Return to Supplier		No	20.000	1/26/2023 2:55 PM
Return to Supplier/VOIP1/26-01-2023	Central Warehouse	Return to Supplier	51214	Yes	5.000	1/26/2023 2:53 PM
Return to Supplier/VOIP0/26-01-2023	Central Warehouse	Return to Supplier		Yes	2.000	1/26/2023 2:52 PM

## Section "Warehouse Operations - Transfer"

**Note:** Move section for moving products from one warehouse to another warehouse

1. Open the "Warehouse operations" section
2. Click on the "New" button and select "Transfer"



Expected result: The "Transfer" page will open

New record What can I do for you? > **Creatio**

SAVE
CANCEL
ACTIONS ▾
PRINT ▾
VIEW ▾

---

Number \_\_\_\_\_ Type **Transfer**  
 Name \_\_\_\_\_ Date **7/17/2023**  
 Warehouse from\* \_\_\_\_\_ Our company\* **Our company**  
 Warehouse on\* \_\_\_\_\_  
 Price List\* **Procurement** Official   
 Amount \_\_\_\_\_ Conducted   
 Note \_\_\_\_\_

3. Fill in the fields in the header of the page:

Field	Value	Note
Number	PERNK-0	Autocomplete after saving
Name	Transfer/PERNK-0/26-01-2023	Autocomplete after saving
Warehouse from	Central Warehouse	Selection from the "Warehouses" directory
Our company	Our company	Autocomplete
Price list	Procurement	Autocomplete
Amount	15750.00	Populates when products are added
Note	iPhones 14 pro	Enter a comment before coming
A type	Transfer	Autocomplete
Date	1/26/2023	Autocomplete
Warehouse on	Regional Warehouse	Selection from the "Warehouses" directory
Conducted	No	Checkbox
Service	No	Checkbox

4. Click on "Save"

## New record

What can I do for you?

SAVE

CANCEL

ACTIONS ▾



Number

Type Transfer

Name

Date 7/18/2023

Warehouse from\* Regional Warehouse

Our company\* Our company

Warehouse on\* East Warehouse

Price List\* Base

Official

Amount

Conducted

Note

Expected result: The "Number" and "Name" fields have been filled

Transfer/PERNK-0/30-01-2023

What can I do for you? >

Creatio

SAVE

CANCEL

ACTIONS ▾



PRINT ▾

VIEW ▾

Number PERNK-0

Type Transfer

Name Transfer/PERNK-0/30-01-2023

Date 1/30/2023

Warehouse from\* Regional Warehouse

Our company\* Our company

Warehouse on\* Central Warehouse

Price List\* Base

Official

Amount 600.00

Conducted

Note

### 5. Add a product

- Add through "+", selecting the required product, the filter is not in stock

< PRODUCTS ATTACHMENTS AND NOTES FEED

Product + : Product selection

Product + : Product selection

Product	Series	Warehouse location	To the wareh...	Nu...	Quantity	Price (with VAT)	Discount, %	Total (with VAT)
					0.000	0.00	0.00	0.00

- Add via the "Product selection" button, all products in the selected Warehouse are displayed

< PRODUCTS ATTACHMENTS AND NOTES FEED

Product + : Product selection

## Selection

What can I do for you?

**SAVE** **CLOSE**

	Product	Price	Residue	Available	Quantity for order
+  Catalog					
-  Favorites					
-  All					
Central Warehouse					
Sample records					
	Apple iPhone 14 Pro	1,050.00	50.00	50.00	0.00

## 6. Choose a product, specify the quantity and save

## Selection

What can I do for you?

**SAVE** **CLOSE**

	Product	Price	Residue	Available	Quantity for order
+  Catalog					
-  Favorites					
-  All					
Central Warehouse					
Sample records					
	Apple iPhone 14 Pro	1,050.00	50.00	50.00	15.00

## 7. Fill in the columns in the "Product" details

< PRODUCTS ATTACHMENTS AND NOTES FEED

Product	Warehouse location	To the warehouse	Quantity	Price (with VAT)	Discount, %	Total (with VAT)
Apple iPhone 14 Pro	1/1-1/2	1/1-1/2	15.000	1,050.00	0.00	15,750.00

Expected result: The fields are filled "Amount"

Amount 15,750.00

## 8. When the products are added, activate the "Conducted" checkbox and save the page

Transfer/PERNK-19/18-07-2023

What can I do for you?

**SAVE**

CANCEL

ACTIONS



PRINT

VIEW

Number	PERNK-19	Type	Transfer
Name	Transfer/PERNK-19/18-07-2023	Date	7/18/2023
Warehouse from*	Regional Warehouse	Our company*	Our company
Warehouse on*	East Warehouse		
Price List*	Base	Official	<input type="checkbox"/>
Amount	120.00	Conducted	<input checked="" type="checkbox"/>
Note			

< PRODUCTS ATTACHMENTS AND NOTES FEED >

Barcode	Product	Series	Warehouse locati...	To the wa...	Quantity	Price (wit...	Discount, %	Total (with VAT)
1111	Air Pods				1.000	120.00	0.00	120.00

## Expected result:

- Products will become unclickable

< PRODUCTS ATTACHMENTS AND NOTES FEED

Product + : Product selection

Product	Warehouse location	To the warehouse	Quantity	Price (with VAT)	Discount, %	Total (with VAT)
Apple iPhone 14 Pro	1/1-1/2	1/1-1/2	15.000	1,050.00	0.00	15,750.00

- On the product page, the delivery quantity is displayed in the "Remaining stock" detail

There was an arrival of 20 pieces of goods at the "Regional warehouse", and now there was a Transfer of 15 pieces.

$20+15=25$  pcs

Remaining stock + :

Warehouse	In stock	Reserved	On hand
Central Warehouse	35.000	0.000	35.000
Regional Warehouse	35.000	0.000	35.000
West Warehouse	0.000	0.000	0.000
East Warehouse	0.000	0.000	0.000

Motion :

Warehouse operation	Stock	A type	Series	Conducted	Quantity
Moving/PERNK-0/26-01-2023	Central Warehouse	Moving		Yes	15.000
Expenditure/RANK-9/26-01-2023	Central Warehouse	Expenditure		Yes	15.000
Arrival/PN-17/26-01-2023	Regional Warehouse	Arrival		Yes	15.000
Arrival/PN-16/24-01-2023	Regional Warehouse	Arrival		Yes	20.000
Arrival/PN-15/24-01-2023	Central Warehouse	Arrival	3200	Yes	50.000

- On the product page, the created Warehouse operation is displayed in the "Motion" detail

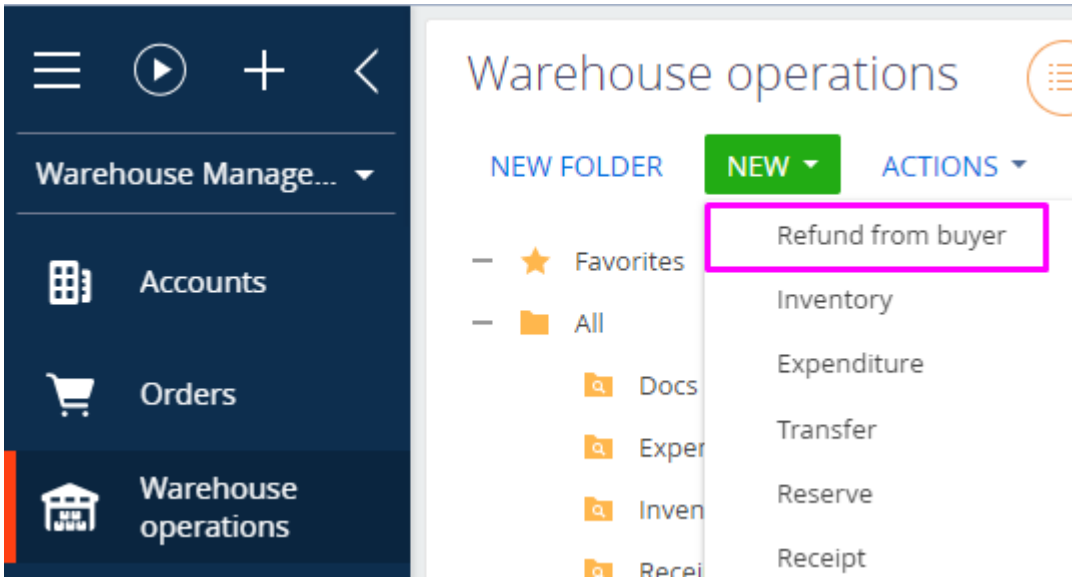
Motion :

Warehouse operation	Stock	A type	Series	Conducted	Quantity
Moving/PERNK-0/26-01-2023	Central Warehouse	Moving		Yes	15.000

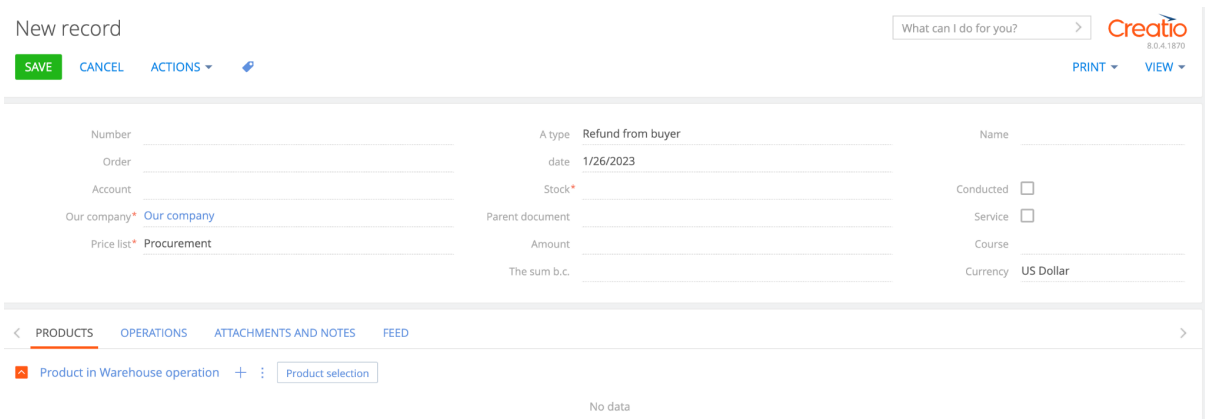
## Section "Warehouse Operations - Refund from buyer"

**Note:** returning the product to the warehouse

1. Open the "Warehouse operations" section
2. Click on the "New" button and select "Refund from buyer"



Expected result: The "Refund from buyer" page will open






3. Fill in the fields in the header of the page:

Field	Value	Note
Number	WAK-0	Autocomplete after saving
Name	Refund from buyer/WAK-0/26-01-2023	Autocomplete after saving
Order		You can pick up the order from which the Account makes a return
Account	Vertigo Systems	The Account making the return
Stock	Central Warehouse	Selection from the "Warehouses" directory
Parent document	Arrival/PN-18/26-01-2023	Selection from the directory "Warehouse"

		Operation "
Our company	Our company	Autocomplete
Price list	Procurement	Autocomplete
Amount	2100.00	Populates when products are added
The sum b.c.	53.85	Populates when products are added
A type	Refund from buyer	Autocomplete
Date	1/26/2023	Autocomplete
Course	39,00	Enter a number
Currency	US Dollar	Autocomplete
Conducted	No	Checkbox
Service	No	Checkbox

#### 4. Click on "Save"


New record What can I do for you? > 




**SAVE** CANCEL ACTIONS  PRINT 

---

Number _____	A type Refund from buyer	Name _____
Order _____	date 1/26/2023	
Account Vertigo Systems	Stock* Central Warehouse	Conducted <input type="checkbox"/>
Our company* Our company	Parent document Arrival/PN-18/26-01-2023	Service <input type="checkbox"/>
Price list* Procurement	Amount _____	Course 39.00
	The sum b.c. _____	Currency US Dollar

Expected result: The "Number" and "Name" fields have been filled

Refund from buyer/WAK-0/26-01-2023 What can I do for you? > 

**SAVE** CANCEL ACTIONS  PRINT  VIEW 

---



Number WAK-0	A type Refund from buyer	Name Refund from buyer/WAK-0/...
Order _____	date 1/26/2023	

#### 5. Add a product

- Add through "+", selecting the required product, the filter is not in stock

< **PRODUCTS** ATTACHMENTS AND NOTES FEED

---

 Product  : Product selection

Product	Series	Warehouse location	To the wareho...	Nu...	Quantity	Price (with VAT)	Discount, %	Total (with VAT)
					0.000	0.00	0.00	0.00

- Add via the "Product selection" button, all products in the selected Warehouse are displayed

PRODUCTS ATTACHMENTS AND NOTES FEED

Product + : Product selection

Selection

SAVE CLOSE

	Product	Price	Residue	Available	Quantity for order
	Apple iPhone 14 Pro	1,050.00	50.00	50.00	0.00

## 6. Choose a product, specify the quantity and save

Selection

SAVE CLOSE

	Product	Price	Residue	Available	Quantity for order
	Apple iPhone 14 Pro	1,050.00	40.00	40.00	2.00

## 7. Fill in the columns in the "Product" details

PRODUCTS OPERATIONS ATTACHMENTS AND NOTES FEED

Product in Warehouse operation + : Product selection

Product	Warehouse location	Number of the Place	Quantity	Price (with VAT)	Discount, %	Total (with VAT)
Apple iPhone 14 Pro	1/1-1/1	1	2.000	1,050.00	0.00	2,100.00

Expected result: The fields are filled "Amount" and "The sum b.c."

Amount 2,100.00

The sum b.c. 53.85

- 8. When the products are added, activate the "Conducted checkbox and save the page



Refund from buyer/WAK-0/26-01-2023

What can I do for you?

**SAVE** CANCEL ACTIONS

---

Number	WAK-0	A type	Refund from buyer	Name	Refund from buyer
Order		date	1/26/2023	Conducted	<input checked="" type="checkbox"/>
Account	Vertigo Systems	Stock*	Central Warehouse	Service	<input type="checkbox"/>
Our company*	Our company	Parent document	Arrival/PN-18/26-01-2023	Course	39.00
Price list*	Procurement	Amount	2,100.00		

Expected result:

- Products will become unclickable

< PRODUCTS OPERATIONS ATTACHMENTS AND NOTES FEED

Product in Warehouse operation + : Product selection

Product	Warehouse location	Number of the Place ^	Quantity	Price (with VAT)	Discount, %	Total (with VAT)
Apple iPhone 14 Pro	1/1-1/1	1	2,000	1,050.00	0.00	2,100.00

- On the product page, the delivery quantity is displayed in the "Remaining stock" detail

Remaining stock + :

Warehouse	In stock v	Reserved	On hand
Central Warehouse	42.000	0.000	42.000
Regional Warehouse	35.000	0.000	35.000

- On the product page, the created Warehouse operation is displayed in the "Motion" detail

Motion :

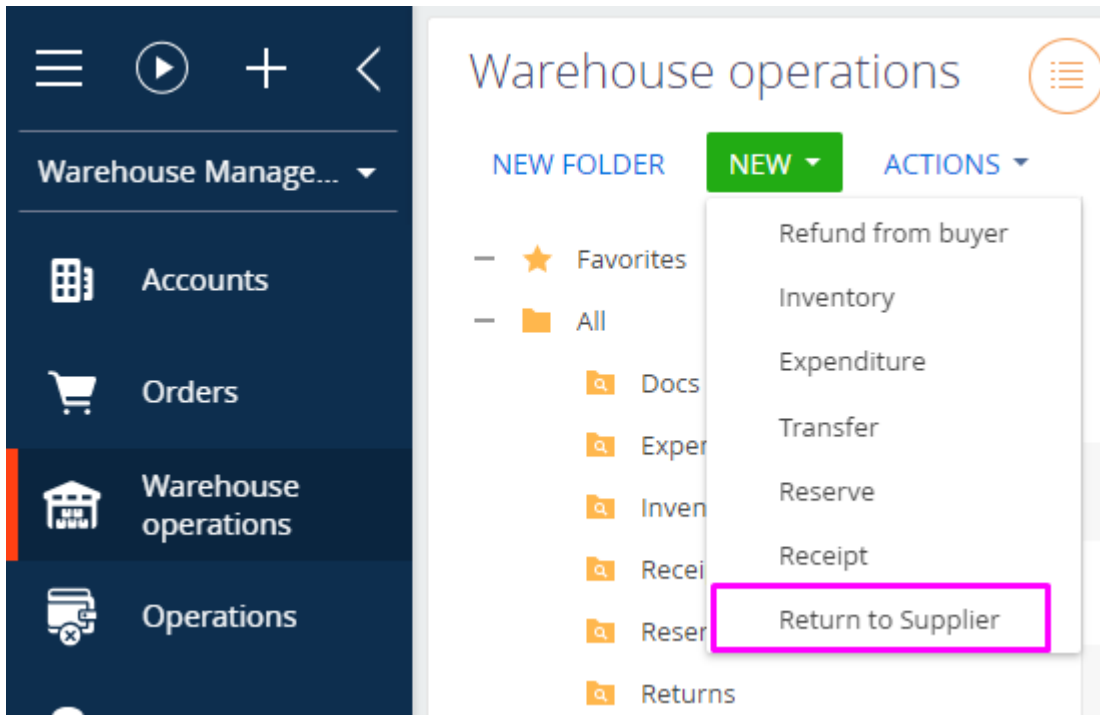
Warehouse operation	Stock	A type	Series	Conducted	Quantity	Modified on v
Refund from buyer/WAK-0/26-01-2023	Central Warehouse	Refund from buyer		Yes	2.000	1/26/2023 12:58 PM
Arrival/PN-18/26-01-2023	Central Warehouse	Arrival	51214	Yes	5.000	1/26/2023 12:22 PM

**Note:** [Create "Refund from buyer" from the "Expenditure" page](#)

## Section "Warehouse Operations - Return to Supplier"

**Note:** return of the product from the warehouse to the Supplier

1. Open the "Warehouse operations" section
2. Click on the "New" button and select "Return to Supplier"



Expected result: The "Refund from Supplier" page will open

New record What can I do for you?

SAVE CANCEL ACTIONS ▾ ✎

---

Number _____	A type <b>Return to Supplier</b>	Name _____
Order _____	date <b>1/26/2023</b>	Conducted <input type="checkbox"/>
Account _____	Stock* _____	Service <input type="checkbox"/>
Our company* <b>Our company</b>	Parent document _____	Course _____
Price list* <b>Base</b>	Amount _____	Currency <b>US Dollar</b>
	The sum b.c. _____	

---

< PRODUCTS ОПЕРАЦИИ ATTACHMENTS AND NOTES FEED

Product in Warehouse operation + : Product selection

3. Fill in the fields in the header of the page:

Field	Value	Note
Number	VOIP1	Autocomplete after saving
Name	Return to Supplier/VOIP1/26-01-2023	Autocomplete after saving
Order		You can pick up the order from which the Account makes a return
Account	Vertigo Systems	The Account making the return

Stock	Central Warehouse	Selection from the "Warehouses" directory
Parent document		The field is blocked. Populated when a return is created with "Arrival"
Our company	Our company	Autocomplete
Price list	Procurement	Autocomplete
Amount	2400.00	Populates when products are added
The sum b.c.	61.54	Populates when products are added
A type	Refund from buyer	Autocomplete
Date	1/26/2023	Autocomplete
Course	39,00	Enter a number
Currency	US Dollar	Autocomplete
Conducted	No	Checkbox
Service	No	Checkbox

#### 4. Click on "Save"

New record What can I do for you?

**SAVE** CANCEL ACTIONS

---

Number	A type	Return to Supplier	Name
Order	date	1/26/2023	Conducted <input type="checkbox"/>
Account	Stock*	Central Warehouse	Service <input type="checkbox"/>
Our company*	Parent document		Course
Price list*	Amount		39.00
Base	The sum b.c.		Currency
			US Dollar

Expected result: The "Number" and "Name" fields have been filled

Return to Supplier/VOIP0/26-01-2023 What can I do for you? >

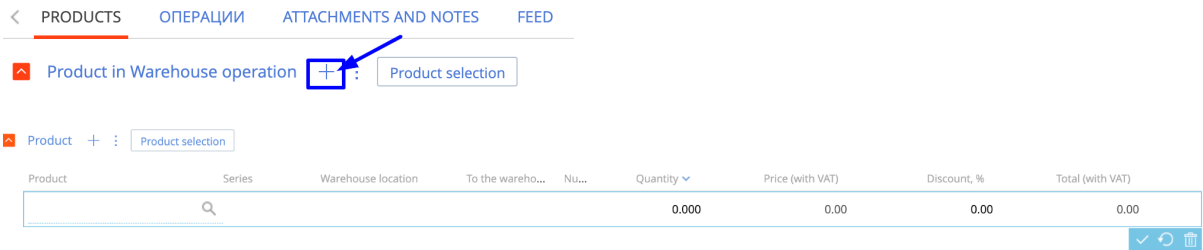
**SAVE** CANCEL ACTIONS PRINT VIEW

---

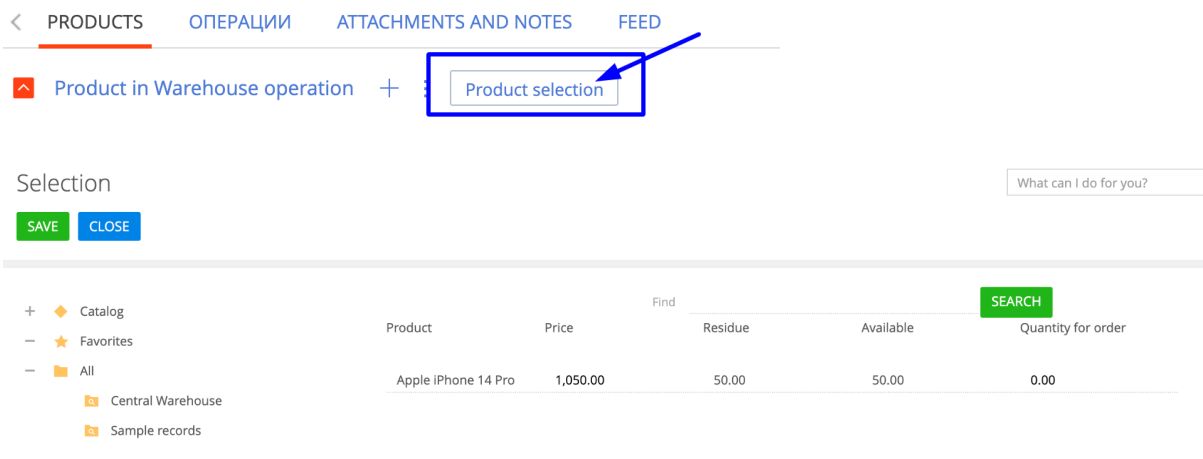
Number	VOIP0	A type	Return to Supplier	Name	Return to Supplier/VOIP0/26-01-2023
Order		date	1/26/2023	Conducted	<input type="checkbox"/>

#### 5. Add a product

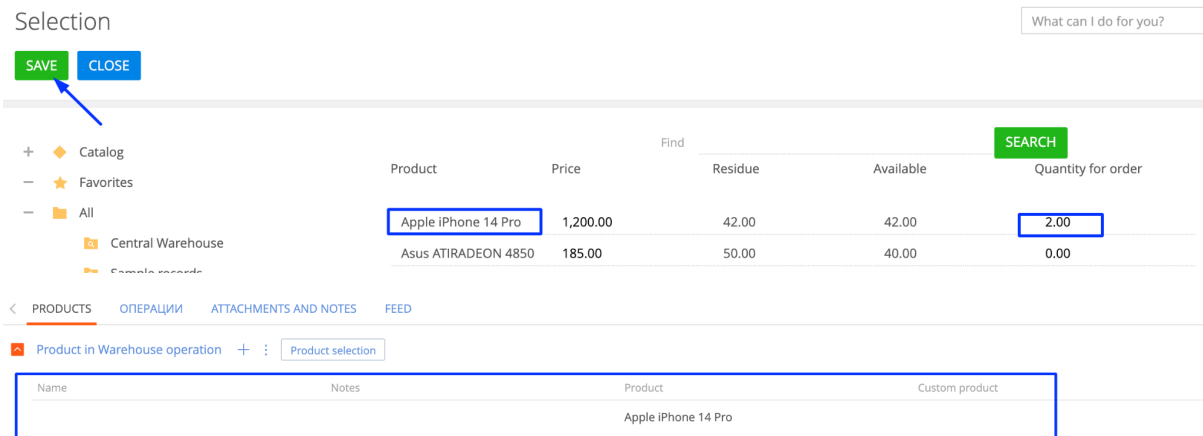
- Add through "+", selecting the required product, the filter is not in stock



- Add via the "Product selection" button, all products in the selected Warehouse are displayed



## 6. Choose a product, specify the quantity and save



Expected result: The fields are filled "Amount" and "The sum b.c."

Amount 2,400.00

The sum b.c. 61.54

- 7. When the products are added, activate the "Conducted" checkbox and save the page

Return to Supplier/VOIP0/26-01-2023

What can I do for you?

SAVE

CANCEL

ACTIONS

Number VOIP0

A type Return to Supplier

Name Return to Supplier

Order

date 1/26/2023

Conducted

Expected result:

- Products will become unclickable

< PRODUCTS ОПЕРАЦИИ ATTACHMENTS AND NOTES FEED

Product in Warehouse operation + : Product selection

Name	Notes	Product	Custom product
		Apple iPhone 14 Pro	

- On the product page, the delivery quantity is displayed in the "Remaining stock" detail

Remaining stock + :

Warehouse	In stock	Reserved	On hand
Central Warehouse	40.000	0.000	40.000
Regional Warehouse	35.000	0.000	35.000

- On the product page, the created Warehouse operation is displayed in the "Motion" detail

Motion :

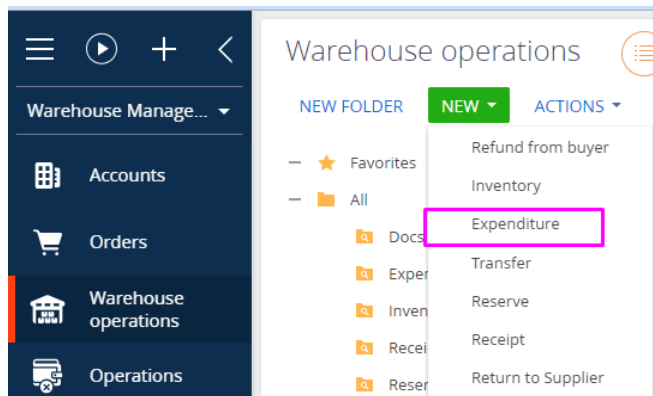
Warehouse operation	Stock	A type	Series	Conducted	Quantity	Modified on
Return to Supplier/VOIP0/26-01-2023	Central Warehouse	Return to Supplier		Yes	2.000	1/26/2023 2:24 PM
Refund from buyer/WAK-0/26-01-2023	Central Warehouse	Refund from buyer		Yes	2.000	1/26/2023 12:58 PM

**Note:** [the return of warehouse goods from "Receipt" back to the Supplier](#)

## Section "Warehouse Operations - Expenditure"

**Note:** Subtraction of goods from the selected warehouse from the balance


1. Open the "Warehouse operations" section
2. Click on the "New" button and select "Expenditure"



## Expected result: The "Expenditure" page will open

New record

What can I do for you?

SAVE CANCEL ACTIONS 

Number	A type	Expenditure	Name
Order	date	2/2/2023	Price list*
Account	Our company*	Our company	Parent document
Contract	Stock*		Course
Amount	Conducted	<input type="checkbox"/>	Currency
The sum b.c.	Service	<input type="checkbox"/>	US Dollar

< PRODUCTS OPERATIONS ATTACHMENTS AND NOTES FEED

 Product + :

No data

### 3. Fill in the fields in the header of the page:

Field	Value	Note
Number	RANK-17	Autocomplete after saving
Name	Expenditure/RANK-17/02-02-2023	Autocomplete after saving
Order		You can pick up the order from which the Account makes a return
Account	Vertigo Systems	The Account making the return
Contract	51	Selection from the directory
Stock	Central Warehouse	Selection from the "Warehouses" directory
Parent document		The field is blocked. Populated when the report is generated using "Warehouse"
Our company	Our company	Autocomplete
Price list	Base	Autocomplete
Amount	2400.00	Populates when products are added
The sum b.c.	2400.00	Populates when products are added

A type	Expenditure	Autocomplete
Date	2/2/2023	Autocomplete
Course	0,00	The field is blocked.
Currency	US Dollar	Autocomplete
Conducted	No	Checkbox
Service	No	Checkbox

## 9. Click on "Save"

New record

What can I do for you?

**SAVE** CANCEL ACTIONS

Number	A type Expenditure	Name
Order	date 2/2/2023	Price list* Base
Account Vertigo Systems	Our company* Our company	Parent document
Contract 51	Stock* Central Warehouse	Course
Amount	Conducted <input type="checkbox"/>	Currency US Dollar
The sum b.c.	Service <input type="checkbox"/>	

Expected result: The "Number" and "Name" fields have been filled

Expenditure/RANK-17/02-02-2023

What can I do for you? > Cr

**SAVE** CANCEL ACTIONS PRINT

Number RANK-17	A type Expenditure	Name Expenditure/RANK-17/02-02-2023
Order	date 2/2/2023	Price list* Base

## 10. Add a product

- Add through "+", selecting the required product, the filter is not in stock

< PRODUCTS ATTACHMENTS AND NOTES FEED

Product **+** : Product selection

Product + : Product selection

Product	Series	Warehouse location	To the wareho...	Nu...	Quantity	Price (with VAT)	Discount, %	Total (with VAT)
					0,000	0,00	0,00	0,00

- Add via the "Product selection" button, all products in the selected Warehouse are displayed

< PRODUCTS ATTACHMENTS AND NOTES FEED

Product + : Product selection

## Selection

What can I do for you?

**SAVE** **CLOSE**

	Product	Price	Residue	Available	Quantity for order
<b>SEARCH</b>					
+  Catalog					
-  Favorites					
-  All					
Central Warehouse					
Sample records					
	Apple iPhone 14 Pro	1,050.00	50.00	50.00	0.00

## 11. Choose a product, specify the quantity and save

### Selection

What can I do for you?

**SAVE** **CLOSE**

	Product	Price	Residue	Available	Quantity for order
<b>SEARCH</b>					
+  Catalog					
-  Favorites					
-  All					
Central Warehouse					
Sample records					
	Apple iPhone 14 Pro	1,050.00	40.00	40.00	2.00

## 12. Fill in the columns in the "Product" details

< **PRODUCTS** OPERATIONS ATTACHMENTS AND NOTES FEED

Product + : Product selection

Product	Series	Warehouse lo...	Quantity	Price (with VAT)	Unit of measure	Discount, %	Total (with VAT)	Barcode
Apple iPhone 14 Pro	3200	1/1-1/4	2.000	1,200.00	pieces	0.00	2,400.00	3222

Expected result: The fields are filled "Amount" and "The sum b.c."

Amount 2,400.00

The sum b.c. 2,400.00

## 13. When the products are added, activate the "Conducted checkbox and save the page

Expenditure/RANK-17/02-02-2023

**SAVE** CANCEL ACTIONS

Number	RANK-17	A type	Expenditure
Order		date	2/2/2023
Account	Vertigo Systems	Our company*	Our company
Contract	51	Stock*	Central Warehouse
Amount	2,400.00	Conducted	<input checked="" type="checkbox"/>
The sum b.c.	2,400.00	Service	<input type="checkbox"/>

Expected result:

- Products will become unclickable



Product + : Product selection

Product	Series	Warehouse lo...	Quantity	Price (with VAT)	Unit of measure	Discount, %	Total (with VAT)	Barcode
Apple iPhone 14 Pro	3200	1/1-1/4	2.000	1,200.00	pieces	0.00	2,400.00	3222

- On the product page, the delivery quantity is displayed in the "Remaining stock" detail

Remaining stock + :

Warehouse	In stock	Reserved	On hand
Central Warehouse	30.000	0.000	30.000
East Warehouse	0.000	0.000	0.000
Regional Warehouse	35.000	0.000	35.000
West Warehouse	0.000	0.000	0.000

- On the product page, the created Warehouse operation is displayed in the "Motion" detail

Motion :

Warehouse operation	Stock	A type	Series	Conducted	Quantity	Modified on
Expenditure/RANK-17/02-02-2023	Central Warehouse	Expenditure	3200	Yes	2.000	2/2/2023 11:20 PM
Inventory/IHBB3/01-02-2023	Central Warehouse	Inventory	3200	No	35.000	2/1/2023 6:46 PM

**Note:** "Expenditure" can be created from Inventory ( "Expenditure" is created if the "Quantity counted" of the product in the inventory is greater than the "Number per fact")

## Creating "Refund from buyer" from the Expenditure

**Note:** Create "Refund from buyer" from the "Expenditure" page

1. The completed "Expenditure" page with added products and "Conducted" page is open

Arrival/PN-18/26-01-2023

What can I do for you? Creati

CANCEL **CLOSE** ACTIONS PRINT VIEW

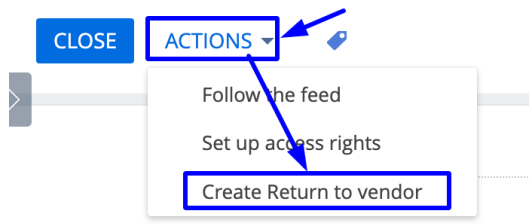
Number PN-18	A type Arrival	Name Arrival/PN-18/26-01-2023
Order ORD-20	date 1/26/2023	
Provider Vertigo Systems	Stock* Central Warehouse	<b>Conducted</b> <input checked="" type="checkbox"/>
Our company* Our company	Parent document	Service <input type="checkbox"/>
Price list* Base	Amount 6,000.00	Course 1.00
	The sum b.c. 6,000.00	Currency US Dollar

Product + : Product selection

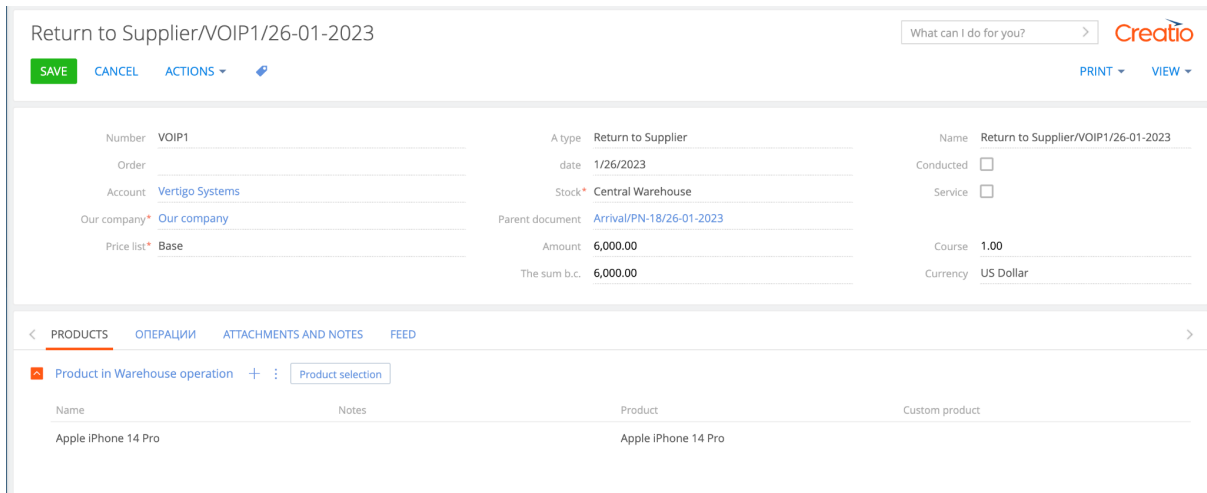
Product	Series	Warehouse location	To the wareho...	Nu...	Quantity	Price (with VAT)	Discount, %	Total (with VAT)
Apple iPhone 14 Pro	51214	1/1-1/3	1/1-1/3	3	5.000	1,200.00	0.00	6,000.00

2. Click on "Actions", select "Create Refund from buyer"

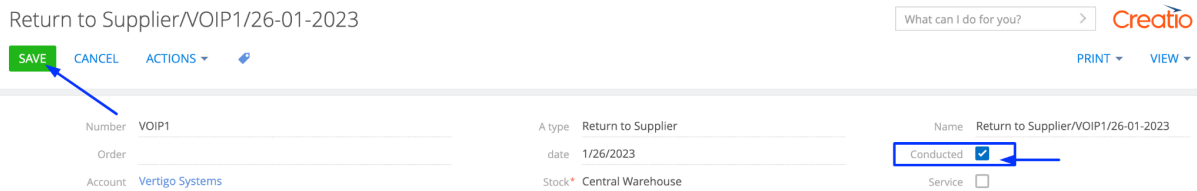
Arrival/PN-18/26-01-2023



Expected result: the "Return to Supplier" page opens, where all fields are filled, and the product from the Arrival is added

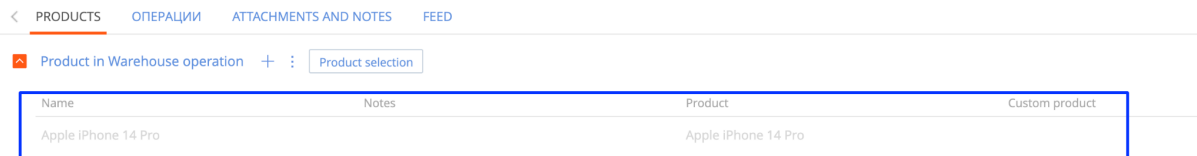


3. When the products are added, activate the "Conducted" checkbox and save the page



Expected result:

- Products will become unclickable



- On the product page, the delivery quantity is displayed in the "Central Warehouse" detail

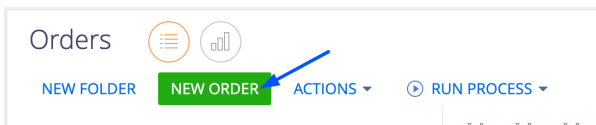


- On the product page, the created Warehouse operation is displayed in the "Motion" detail

Warehouse operation	Stock	A type	Series	Conducted	Quantity	Modified on
Return to Supplier/VOIP2/26-01-2023	Regional Warehouse	Return to Supplier		No	20.000	1/26/2023 2:55 PM
Return to Supplier/VOIP1/26-01-2023	Central Warehouse	Return to Supplier	51214	Yes	5.000	1/26/2023 2:53 PM
Return to Supplier/VOIP0/26-01-	Central Warehouse	Return to Supplier		Yes	2.000	1/26/2023 2:52 PM

## Section "Order"

1. Open the "Orders" section
2. Click on the "New Order" button



Expected result: The Order page will open

ORD-22

What can I do for you?

Creatio

SAVE CANCEL ACTIONS RUN PROCESS
PRINT VIEW

1. Draft
2. Confirmation
3. In progress
4. Completed
5. Canceled

NEXT STEPS (0)
📞 📧 📄 📅 📌 📁

You don't have any tasks yet  
Press **F** above to add a task

Account*	Our company: <u>Our company</u>	Order type* <u>Customer</u>
Contact	Shipping Status: <u>In the plans</u>	Reservation <input type="checkbox"/>
Contract	Payment status: <u>Planned</u>	Currency* <u>US Dollar</u>
Order status: <u>1. Draft</u>	Price list* <u>Base</u>	It remains to pay
Stock*	Payment amount, \$	
Total, \$	VAT	
Amount of overdue payment	Number of days overdue	

< PRODUCTS GENERAL INFORMATION DELIVERY HISTORY WAREHOUSE OPERATIONS SUMMARY APPROVALS ATTACHMENTS AND NOTES FEED ORDER DETAILS >

Products +
Items: 0 Total: \$ 0.00
Income, B.C. (tax free) \$ 0.00

No data

3. Fill in the fields in the header of the page:

Field	Value	Note
Account	Build Technologies	The account that makes the order Directory "Accounts"
Contact	Christine Nelson	The Contact that makes the order

Contract	337	Contract for the client
Order status	1. Draft	Autocomplete
Stock	Central Warehouse	Selection from the "Warehouses" directory
Total, \$		Filled after adding products
Amount of overdue payment		Filled when the order becomes overdue
Our company	Our company	Autocomplete
Shipping Status	Planned	Autocomplete
Payment status	Planned	Autocomplete
Price list	Base	Autocomplete
Payment amount, \$		Filled after adding products
VAT	VAT 18%	Independently change the % of goods tax in the order
Number of days overdue		Filled when the order becomes overdue
Order type	Customer	Autocomplete. <b>There are two types of orders:</b> <b>1. Customer order</b> <b>2. Supplier order</b>
Currency	US Dollar	Autocomplete
It remains to pay		Filled after adding products
Reservation	No	Checkbox. Activates when a Reserve to order is created, and activated "Conducted"

Account* <b>Build Technologies</b>	Our company <b>Our company</b>	Order type* <b>Customer</b>
Contact <b>Christine Nelson</b>	Shipping Status <b>In the plans</b>	Reservation <input type="checkbox"/>
Contract <b>337</b>	Payment status <b>Planned</b>	Currency* <b>US Dollar</b>
Order status <b>1. Draft</b>	Price list* <b>Base</b>	It remains to pay
Stock* <b>Central Warehouse</b>	Payment amount, \$	
Total, \$	VAT	
Amount of overdue payment	Number of days overdue	

#### 4. Click on "Save"

ORD-22

SAVE
CANCEL
ACTIONS ▾
📄
🔄 RUN PROCESS ▾

#### 5. Add a product

<
PRODUCTS
GENERAL INFORMATION
DELIVER'

↑
Products
+
⋮

Expected result: all products in the selected Warehouse are displayed

Selection What can I do for you? >

SAVE
CLOSE
🔄 RUN PROCESS ▾

	Product	Price	Residue	Available	Quantity for order
+	AirPods	100.00	0.00	0.00	0.00
-	Apple iPhone 14 Pro	1,200.00	35.00	35.00	0.00
-	asd	0.00	0.00	0.00	0.00
-	Asus ATIRADEON 4850	185.00	50.00	40.00	0.00
-	Asus R9280X-DC2F-3...	450.00	-10.00	-30.00	0.00
-	Battery Back-up Syste...	196.95	10.00	10.00	0.00
-	Battery Back-up Syste...	440.79	2.00	2.00	0.00
-	Intel Core i5-4670K	290.00	-20.00	-20.00	0.00
-	Intel Core i7-4930K	730.00	0.00	0.00	0.00
-	Motherboard Asus M...	110.00	99.00	91.00	0.00
-	Motherboard Asus P5...	240.00	9.00	0.00	0.00
-	Motherboard MSI Z97...	180.00	0.00	0.00	0.00
-	Net core2	0.00	0.00	0.00	0.00
-	ZTE	120.00	0.00	0.00	0.00

#### 6. Choose a product, specify the quantity and save

Selection What can I do for you?

SAVE
CLOSE
🔄 RUN PROCESS ▾

	Product	Price	Residue	Available	Quantity for order
+	AirPods	100.00	0.00	0.00	2.00
-	Apple iPhone 14 Pro	1,200.00	35.00	35.00	3.00
-	asd	0.00	0.00	0.00	0.00
-	Asus ATIRADEON 4850	185.00	50.00	40.00	0.00

Expected result: The fields are filled "Total, \$"

Total, \$ 3,800.00

The products are displayed on the order page

Product	Quantity	Price	Unit of measu...	Discount, %	Tax	Tax amount	Total
Apple iPhone 14 Pro	3.000	1,200.00		0.00	VAT 20%	600.00	3,600.00
AirPods	2.000	100.00		0.00	VAT 20%	33.33	200.00

7. In the "Taxes" field, change the value and save  
ORD-22

SAVE CANCEL ACTIONS RUN PROCESS

NEXT STEPS (0)

You don't have any tasks yet  
Press [flag icon] above to add a task

Account*	Build Technologies	Our company	Our company
Contact	Christine Nelson	Shipping Status	In the plans
Contract	337	Payment status	Planned
Order status	1. Draft	Price list*	Base
Stock*	Central Warehouse	Payment amount,	0.00
Total, \$	3,800.00	VAT	VAT 18%

Expected result: Products show a positive value in the "Taxes" column

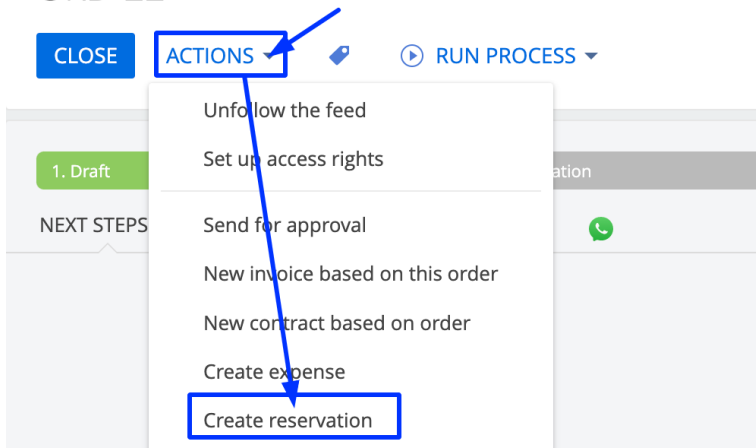
Product	Quantity	Price	Unit of measu...	Discount, %	Tax	Tax amount	Total
Apple iPhone 14 Pro	3.000	1,200.00		0.00	VAT 18%	549.15	3,600.00
AirPods	2.000	100.00		0.00	VAT 18%	30.51	200.00

## Creating "Reserve" from the Order

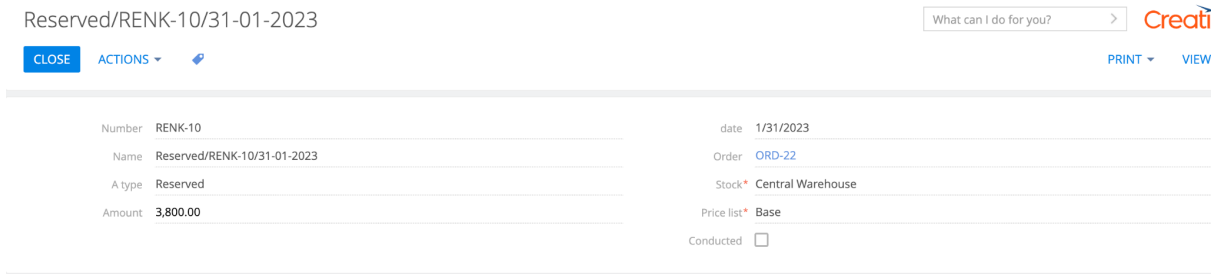
**Note:** we reserve a certain amount of product for the client.

1. The order page is open
2. Click on "Actions", select "Create reservation"

ORD-22



Expected result: the "Reserved" page opens, where all fields are filled, and the product from the order is added



< PRODUCTS ATTACHMENTS AND NOTES FEED

Product + : Product selection

Product	Price, base currency	Quantity	Warehouse lo...	Number of the Place	Unit of measure	Discount, %	Total (with VAT)
AirPods	100.00	2.000		4		0.00	200.00
Apple iPhone 14 Pro	1,200.00	3.000		11		0.00	3,600.00

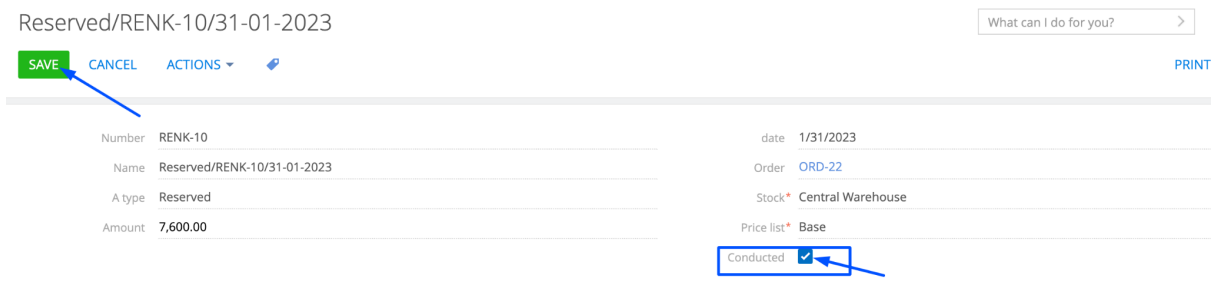
### 3. Fill in the columns in the "Product" details

< PRODUCTS ATTACHMENTS AND NOTES FEED

Product + : Product selection

Product	Price, base currency	Quantity	Warehouse lo...	Number of the Place	Unit of measure	Discount, %	Total (with VAT)
AirPods	100.00	2.000	1/3-1/4	12		0.00	200.00
Apple iPhone 14 Pro	1,200.00	3.000	1/3-1/3	11		0.00	3,600.00

### 4. When the products are added, activate the "Conducted" checkbox and save the page



Expected result:

- Products will become unclickable

< PRODUCTS ATTACHMENTS AND NOTES FEED

Product + : Product selection

Product	Price, base currency	Quantity	Warehouse lo...	Number of the Place	Unit of measure	Discount, %	Total (with VAT)
AirPods	100.00	2.000	1/1-1/4	4		0.00	200.00
Apple iPhone 14 Pro	1,200.00	3.000	1/3-1/3	11		0.00	3,600.00

5. Open the Order page  
 Expected result: products became unclickable, "Reservation" checkbox activated

Account\* Build Technologies      Our company Our company      Order type\* Customer

Contact Christine Nelson      Shipping Status In the plans

Contract 337      Payment status Planned       Reservation

Order status 1. Draft      Price list\* Base      Currency\* US Dollar

Stock\* Central Warehouse      Payment amount, \$ 0.00      It remains to pay 0.00

Total, \$ 3,800.00      VAT      Number of days overdue 0

< PRODUCTS GENERAL INFORMATION DELIVERY HISTORY WAREHOUSE OPERATIONS SUMMARY APPROVALS ATTACHMENTS AND NOTES FEED ORDER DETAILS >

Products      Items: 2 Total: \$ 3,800.00      Income, B.C. (tax free) \$ 0.00

Product	Quantity	Price	Unit of measu...	Discount, %	Tax	Tax amount	Total
Apple iPhone 14 Pro	3.000	1,200.00		0.00	VAT 20%	600.00	3,600.00
AirPods	2.000	100.00		0.00	VAT 20%	33.33	200.00

6. Open the Product page

< PRODUCTS GENERAL INFORMATION DELIVERY HISTORY WAREHOUSE OPERATIONS SUMMARY APPROVALS ATTACHMENTS AND NOTES FEED ORDER DETAILS >

Products + :      Items: 2 Total: \$ 3,800.00      Income, B.C. (tax free) \$ 0.00

Product	Quantity	Price	Unit of measu...	Discount, %	Tax	Tax amount	Total
Apple iPhone 14 Pro	3.000	1,200.00		0.00	VAT 20%	600.00	3,600.00
AirPods	2.000	100.00		0.00	VAT 20%	33.33	200.00

- On the product page, the amount of the Reserve is displayed in the "Remaining stock" detail

Remaining stock + :

Warehouse	In stock	Reserved	On hand
Central Warehouse	35.000	3.000	32.000
Regional Warehouse	35.000	0.000	35.000

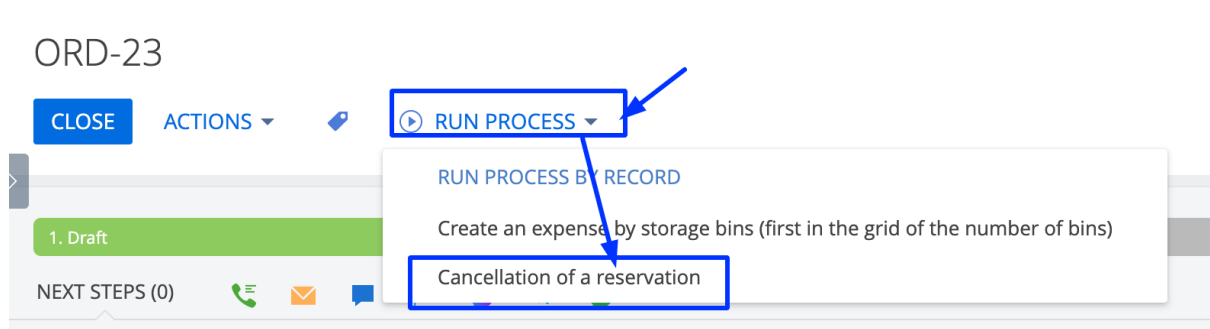
- On the product page, the created Warehouse operation is displayed in the "Motion" detail

Motion :

Warehouse operation	Stock	A type	Series	Conducted	Quantity	Modified on
Reserved/RENK-11/31-01-2023	Central Warehouse	Reserved		Yes	3.000	1/31/2023 9:11 AM
Inventory/IHBI/26-01-2023	Regional Warehouse	Inventory		No	0.000	1/27/2023 12:05 PM

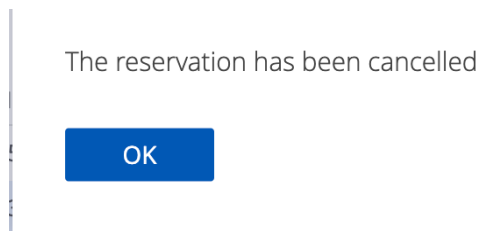
7. To remove "Reserve", you need to start the Business process "Cancellation of a reservation"



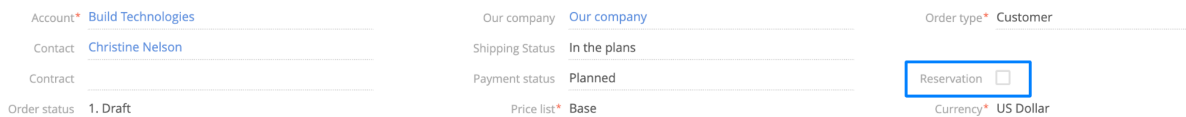


**Expected result:**

- A modal window appears with the message "The reservation has been canceled"



- The "Reservation" checkbox is deactivated



- on the product page "Reserve" has disappeared

Remaining stock + :

Warehouse ^	In stock	Reserved	On hand
Central Warehouse	32.000	0.000	32.000

**Creating "Receipt" from the Order**

**Note:** "Receipt" can be created from an order

1. The order page is open in which:
  - Order type - Supplier
  - an account whose type is supplier
  - added products

ORD-101

What can I do for you? **Creatio** 8.0.5-2483 Debug

CLOSE ACTIONS RUN PROCESS PRINT VIEW

1. Draft 2. Confirmation 3. In progress 4. Completed 5. Canceled

NEXT STEPS (0)

You don't have any tasks yet  
Press **F3** above to add a task

Account\* Precision Systems Our company Our company Order type\* Supplier

Contact Contract

Shipping Status In the plans

Payment status Planned

Reservation

Order status 1. Draft Price list\* Base Currency\* US Dollar

Stock\* East Warehouse Payment amount, \$ 0.00 It remains to pay 0.00

Total, \$ 7,600.00

VAT

Amount of overdue payment 0.00 Number of days overdue 0

PRODUCTS GENERAL INFORMATION DELIVERY HISTORY WAREHOUSE OPERATIONS SUMMARY APPROVALS ATTACHMENTS AND NOTES FEED ORDER DETAILS

Products + Items: 3 Total: \$ 7,600.00 Income, B.C. (tax free) \$ 0.00 Product selection

Product	Qua...	Price	Unit of measu...	Disc...	Discount amo...	Tax	Tax %	Tax amount	Total
Air Pods	5.000	120.00	pieces	0.00	0.00	VAT	20.00	100.00	600.00
Apple iPhone 14 Pro	5.000	1,200.00	pieces	0.00	0.00	VAT	20.00	1,000.00	6,000.00
ZTE	20.000	50.00	pieces	0.00	0.00	VAT	20.00	166.67	1,000.00

## 2. Click on "Actions", select "Create Receipt"

ORD-104

CLOSE ACTIONS RUN PROCESS

1. Draft

NEXT STEPS

- Unfollow the feed
- Set up access rights
- Send for approval
- New invoice based on this order
- New contract based on order
- Create expenditure
- Create reservation
- Create receipt**

Expected result: the "Arrival" page opens, where all fields are filled, and the product from the order is added

SAVE CANCEL ACTIONS

PRINT VIEW

Number PRNK-21	A type Arrival	Name Arrival/PRNK-21/06-02-2023
Order ORD-101	date 2/6/2023	
Provider Precision Systems	Stock* East Warehouse	Conducted <input type="checkbox"/>
Our company* Our company	Parent document	Service <input type="checkbox"/>
Price list* Base	Amount 7,600.00	Course 1.00
	The sum b.c. 7,600.00	Currency US Dollar

PRODUCTS OPERATIONS ATTACHMENTS AND NOTES FEED

Product + : Product selection

Barcode	Product	Series	Warehouse lo...	Number of th...	Quantity	Price (with VAT)	Tax %	Tax amount	Discount, %	Total (with VAT)
1111	Air Pods			0	5,000	120.00	20.00	120.00	0.00	600.00
126923	Apple iPhone 14 Pro			0	5,000	1,200.00	20.00	1,200.00	0.00	6,000.00
12123	ZTE			0	20,000	50.00	20.00	200.00	0.00	1,000.00

### 3. Fill in the columns in the "Product" details

PRODUCTS OPERATIONS ATTACHMENTS AND NOTES FEED

Product + : Product selection

Product	Series	Warehouse location	To the wareho...	Nu...	Quantity	Price (with VAT)	Discount, %	Total (with VAT)
Apple iPhone 14 Pro	51214	1/1-1/3	1/1-1/3	3	5,000	1,200.00	0.00	6,000.00

### 4. When the products are added, activate the "Conducted" checkbox and save the page

CANCEL CLOSE ACTIONS

PRINT VIEW

Number PRNK-20	Type Receipt	Name Receipt/PRNK-20/06-0...
Order ORD-101	Date 2/6/2023	
Provider Precision Systems	Warehouse* East Warehouse	Conducted <input checked="" type="checkbox"/>
Our company* Our company	Parental Document	Official <input type="checkbox"/>
Price List* Base	Amount 1,600.00	Currency Rate 1.00
	Primary Amount 1,600.00	Currency US Dollar

Expected result:

- Products will become unclickable

PRODUCTS OPERATIONS ATTACHMENTS AND NOTES FEED

Product + : Product selection

Product	Series	Warehouse location	To the wareho...	Nu...	Quantity	Price (with VAT)	Discount, %	Total (with VAT)
Apple iPhone 14 Pro	51214	1/1-1/3	1/1-1/3	3	5,000	1,200.00	0.00	6,000.00

- On the product page, the delivery quantity is displayed in the "Remaining stock" detail

Remaining stock + :

Warehouse	In stock	Reserved	On hand
Central Warehouse	40,000	0,000	40,000
Regional Warehouse	35,000	0,000	35,000
West Warehouse	0,000	0,000	0,000

- On the product page, the created Warehouse operation is displayed in the "Motion" detail

Motion :

Warehouse operation	Stock	A type	Series	Conducted	Quantity	Modified on
Arrival/PN-18/26-01-2023	Central Warehouse	Arrival	51214	Yes	5.000	1/26/2023 12:22 PM

- On the product page, in the "Remaining storage space" detail, free storage space is displayed

Remaining storage space + :

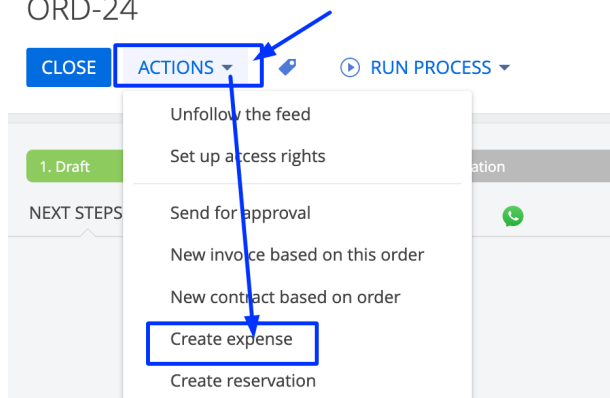
Product	Residue	Reserved	Available	Warehouse	Warehouse location	Place number
Apple iPhone 14 Pro	5.000	0.000	5.000	Central Ware...	1/1-1/3	3
Apple iPhone 14 Pro	5.000	0.000	5.000	Central Ware...	1/1-1/3	3

## Creating "Expenditure" from the Order

**Note:** Subtraction of goods from the selected warehouse from the balance

1. The order page is open
2. Click on "Actions", select "Create expense"

ORD-24



Expected result: the "Expenditure" page opens, where all fields are filled, and the product from the order is added

Expenditure/RANK-13/31-01-2023 What can I do for you?

**SAVE** CANCEL ACTIONS

PRINT VIEW

---

Number RANK-13      A type Expenditure      Name Expenditure/RANK-13/31-01-2023  
 Order ORD-24      date 1/31/2023      Price list\* Base  
 Account Build Technologies      Our company\* Our company  
 Contract 337      Stock\* Central Warehouse      Parent document  
 Amount 3,800.00      Conducted       Course 1.00  
 The sum b.c. 3,800.00      Service       Currency US Dollar

---

< PRODUCTS OPERATIONS ATTACHMENTS AND NOTES FEED >

Product + :

Product	Series	Warehouse lo...	Quantity	Price (with VAT)	Unit of measure	Discount, %	Total (with VAT)	Barcode
AirPods			2.000	100.00		0.00	200.00	14585
Apple iPhone 14 Pro			3.000	1,200.00		0.00	3,600.00	126923

### 8. Fill in the columns in the "Product" details

< PRODUCTS OPERATIONS ATTACHMENTS AND NOTES FEED >

Product + :

Product	Series	Warehouse lo...	Quantity	Price (with VAT)	Unit of measure	Discount, %	Total (with VAT)	Barcode
AirPods	1000	1/1-1/3	2.000	100.00		0.00	200.00	12585
Apple iPhone 14 Pro	3200	1/2-1/4	3.000	1,200.00		0.00	3,600.00	3222

### 9. When the products are added, activate the "Conducted" checkbox and save the page

Expenditure/RANK-13/31-01-2023 What can I do for you?

**SAVE** CANCEL ACTIONS

PRINT VIEW

---

Number RANK-13      A type Expenditure      Name Expenditure/RANK-13/31-01-2023  
 Order ORD-24      date 1/31/2023      Price list\* Base  
 Account Build Technologies      Our company\* Our company  
 Contract 337      Stock\* Central Warehouse      Parent document  
 Amount 3,800.00      Conducted       Course 1.00  
 The sum b.c. 3,800.00      Service       Currency US Dollar

Expected result:

- Products will become unclickable

< PRODUCTS OPERATIONS ATTACHMENTS AND NOTES FEED >

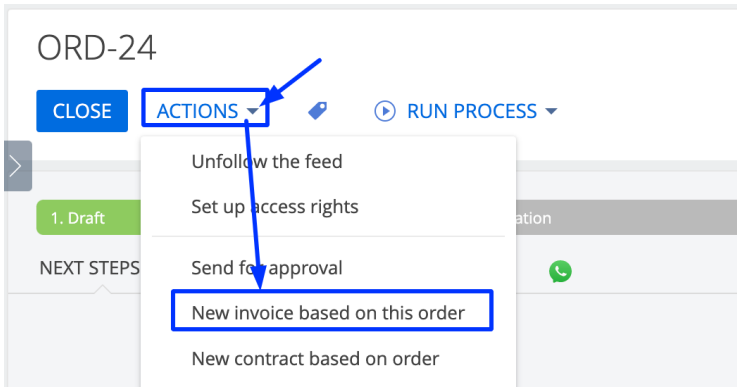
Product + :

Product	Series	Warehouse lo...	Quantity	Price (with VAT)	Unit of measure	Discount, %	Total (with VAT)	Barcode
AirPods	1000	1/1-1/3	2.000	100.00		0.00	200.00	12585
Apple iPhone 14 Pro	3200	1/2-1/4	3.000	1,200.00		0.00	3,600.00	3222

## Creating "Invoices" from the Order

**Note:** we reserve a certain amount of product for the client.

1. The order page is open
2. Click on "Actions", select "New invoice based on this order"



Expected result: the "Invoices" page opens, where all fields are filled, and the product from the order is added

INV-9 What can I do for you? > **Creatio**

SAVE CANCEL ACTIONS

TASK PROPERTIES PRINT VIEW

Fill in the required fields and save the invoice

Number INV-9 Date 1/31/2023

Order ORD-24

Account Build Technologies

Contract 337

Exchange rate 1.00000000

Amount 3,800.00

Payment amount 0.00

Owner Supervisor

Stock Central Warehouse

Payment status Draft

Currency US Dollar

Price List Base

VAT

Note

< PRODUCTS GENERAL INFORMATION HISTORY APPROVALS ATTACHMENTS AND NOTES FEED >

Products + :

Product	Price	Quantity	Unit of measure	Discount, %	Total
AirPods	100.00	2,000		0.00	200.00
Apple iPhone 14 Pro	1,200.00	3,000		0.00	3,600.00

### 3. Fill in the columns in the "Product" details

< PRODUCTS GENERAL INFORMATION HISTORY APPROVALS ATTACHMENTS AND NOTES FEED >

Products + :

Product	Price	Quantity	Unit of measure	Discount, %	Total
AirPods	100.00	2,000	pieces	0.00	200.00
Apple iPhone 14 Pro	1,200.00	3,000	pieces	0.00	3,600.00

### 4. Go to the "General information" tab



### 5. Fill in the "Date" field in the "Payment" field group

### 6. You can also fill in the field "Customer details", "Supplier details", and the group of fields "Connected to", and "Reminders"

[PRODUCTS](#) [GENERAL INFORMATION](#) [HISTORY](#) [APPROVALS](#) [ATTACHMENTS AND NOTES](#) [FEED](#)

**Amount**  
 Amount, \$ 3,800.00 VAT amount 0.00  
 Amount including VAT 3,800.00

**Payment**  
 Payment status\* Paid   
 Payment amount, \$ 3,800.00

**Connected to**  
 Contract  Opportunity   
 Project

**Reminders**  
 Responsible  Reminder Date

### 7. Click on the "Save" button

INV-9

Fill in the required fields and save the invoice

Number INV-9 Date\* 1/31/2023 Owner\* Supervisor  
 Order ORD-24 Stock\* Central Warehouse

### 8. Go to the "History" tab

[PRODUCTS](#) [GENERAL INFORMATION](#) [HISTORY](#) [APPROVALS](#)

### 9. Add "Operations"

[PRODUCTS](#) [GENERAL INFORMATION](#) [HISTORY](#)

Expected result: the Operations page opens, the fields are not filled

70

Number 70 Actual date\* 1/31/2023 A type\* Arrival  
 Status\* Completed Currency US Dollar Amount 3,800.00  
 Article Payment from customer Responsible Supervisor  
 Appointment

[BASIC INFORMATION](#) [AMOUNT](#) [COMMUNICATION OPERATIONS](#) [ATTACHMENTS AND NOTES](#) [FEED](#)

**Operations**  
 CF  p / s (cash) Primary ticket office  
 Planned date  Actual date\* 1/31/2023  
 Period January 2023

**Counterparties**  
 Payer Build Technologies Recipient Our company  
 Contact-payer  Contact recipient

## 10. Fill in the fields on the transaction page and save

70

What can I do for you? > Cre

**SAVE** CANCEL ACTIONS ▾

Number 70 Actual date\* 1/31/2023 A type\* Arrival  
Status\* Completed Currency US Dollar Amount 3,800.00  
Article Payment from customer Responsible Supervisor  
Appointment Payment for the order

< BASIC INFORMATION AMOUNT COMMUNICATION OPERATIONS ATTACHMENTS AND NOTES FEED

Operations

CF  p / s (cash) Primary ticket office  
Planned date 1/31/2023 Actual date\* 1/31/2023  
Period January 2023

Counterparties

Payer Build Technologies Recipient Our company  
Contact-payer Christine Nelson Contact recipient Administrator

## 11. Go to the "Invoices"

Expected result: "Payment status" field changed to "Paid"

INV-9

What can I do for you?

**SAVE** CANCEL ACTIONS ▾

Number INV-9 Date\* 1/31/2023 Owner\* Supervisor  
Order ORD-24 Stock\* Central Warehouse  
Account\* Build Technologies Payment status\* Paid  
Contract 337 Currency\* US Dollar

## 12. Open the "Order" page

INV-9

**CLOSE** ACTIONS ▾

Number INV-9 Date\* 1/31/2023  
Order ORD-24

Expected result: Fields changed values:

"Shipping Status" - "Completed"

"Payment status" - "Paid"

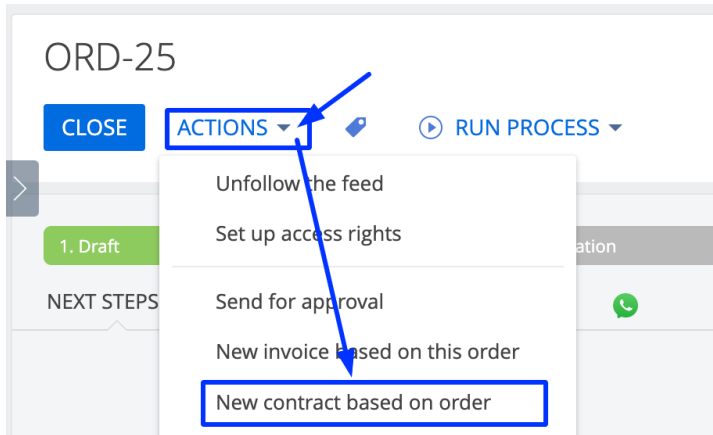
"Payment amount, \$" - 3,800.00

Account\* Build Technologies Our company Our company  
Contact Christine Nelson Shipping Status Completed  
Contract 337 Payment status Paid  
Order status 1. Draft Price list\* Base  
Stock\* Central Warehouse Payment amount, \$ 3,800.00



## Creating "Contract" from the Order

1. The order page is open
2. Click on "Actions", select "New contract based on order"



Expected result: A modal window appears with the message "Connect the ordered products to contract?"

Connect the ordered products to contract?

ALL SELECT CANCEL

3. Click on the "All" button

Connect the ordered products to contract?

ALL SELECT CANCEL

Expected result: the "Contract" page opens, where all fields are filled, and the product from the order is added

**CLOSE** ACTIONS ▾

PRINT ▾ VIEW ▾

Draft To be signed Signed Canceled

NEXT STEPS (0)

You don't have any tasks yet  
 Press above to add a task

Number 55	Owner* Supervisor
Account* Build Technologies	Status* Draft
Start date* 2/1/2023	End date
Type* Contract	Is Primary <input type="checkbox"/>
Price List* Base	Number of days to defer payment 0
Currency	Contract Sum 0.00

< GENERAL INFORMATION HISTORY APPROVALS ATTACHMENTS AND NOTES FEED CONTRACT DETAILS >

Account's banking details	Our company* Our company
Contact* Christine Nelson	Our banking details
	Opportunity

Amount

Amount, \$ 3,600.00

- Products from the order are displayed in the "Contact details" tab

< GENERAL INFORMATION HISTORY APPROVALS ATTACHMENTS AND NOTES FEED **CONTRACT DETAILS** >

Products + :

Name	Quantity	Amount	Discount, %	Total	Total, base currency	Order
	3.000	3,600.00	0.00	3,600.00	3,600.00	ORD-24

#### 4. Fill in the fields:

- Currency - US Dollar
- End date - 2/28/2023
- Is Primary - Yes
- Number of days to defer payment - 5
- Contract Sum - 3600.00
- Account's banking details - For invoices
- Our banking details - For invoices (USD)
- if necessary, change the "price list"

Number 55	Owner* Supervisor
Account* Build Technologies	Status* Draft
Start date* 2/1/2023	End date 2/28/2023
Type* Contract	Is Primary <input checked="" type="checkbox"/>
Price List* Base	Number of days to defer payment 5
Currency US Dollar	Contract Sum 3,600.00

< GENERAL INFORMATION HISTORY APPROVALS ATTACHMENTS AND NOTES FEED CONTRACT DETAILS >

Account's banking details For invoices	Our company* Our company
Contact* Christine Nelson	Our banking details For invoices (USD)
	Opportunity

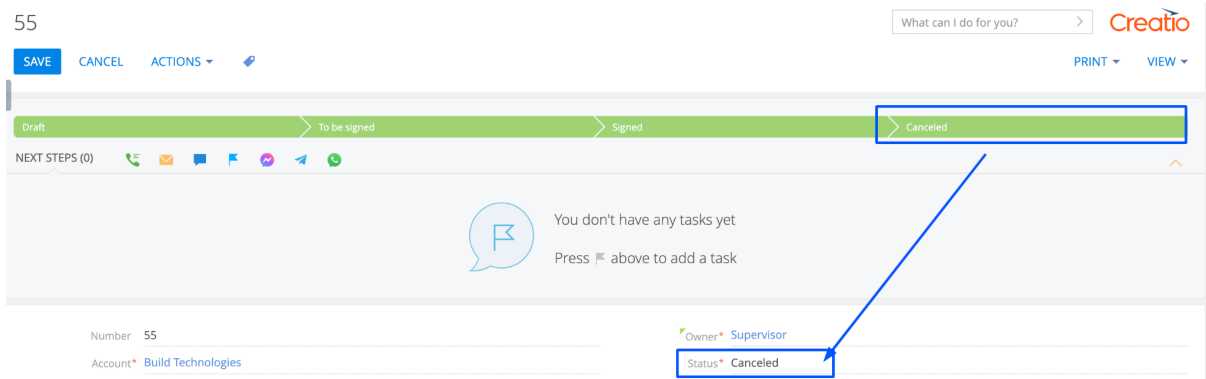
## 5. Click on "Save"

55



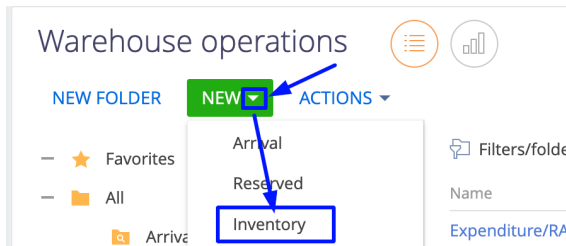
## 6. As the contract moves through the stages, the values in the "Status" field will change

55

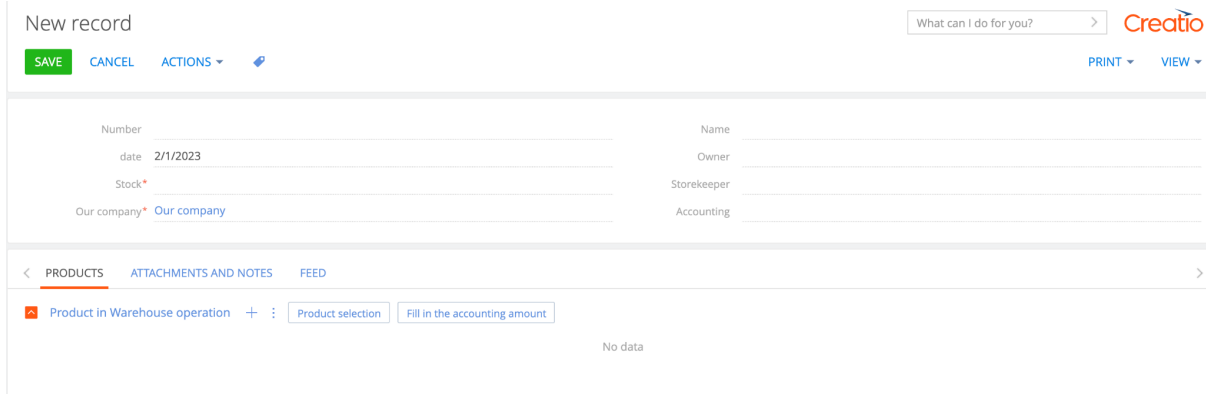


## Section "Warehouse Operations - Inventory"

1. Open the "Warehouse operations" section
2. Click on the "New" button and select "Inventory"



Expected result: The "Inventory" page will open



3. Fill in the fields in the header of the page:

Field	Value	Note
Number	IHB0	Autocomplete after saving
Name	Inventory/IHB0/26-01-2023	Autocomplete after saving
Date	2/1/2023	Autocomplete
Stock	Central Warehouse	Selection from the drop-down list
Our company	Our company	Autocomplete
Owner	Alice Phillips	Selection from the directory "Contacts"
Storekeeper	John Best	Selection from the directory "Contacts"
Accounting	Megan Lewis	Selection from the directory "Contacts"

New record What can I do for you? > **Creati**

SAVE CANCEL ACTIONS ▾ 🔗
PRINT ▾ VIEW

---

Number \_\_\_\_\_ Name \_\_\_\_\_  
 date 2/1/2023 Owner Alice Phillips  
 Stock\* Central Warehouse Storekeeper John Best  
 Our company\* Our company Accounting Megan Lewis

4. Click on "Save"

New record

SAVE CANCEL ACTIONS ▾ 🔗

Expected result: The "Number" and "Name" fields have been filled

Inventory/IHB3/01-02-2023 What can I do for

SAVE CANCEL ACTIONS ▾ 🔗

---

Number IHB3 Name Inventory/IHB3/01-02-2023  
 date 2/1/2023 Owner Alice Phillips  
 Stock\* Central Warehouse Storekeeper John Best  
 Our company\* Our company Accounting Megan Lewis

5. Add via the "Product Selection" button, all products in the selected Warehouse where there is a balance are displayed

← PRODUCTS ATTACHMENTS AND NOTES FEED

Product in Warehouse operation + : Product selection Fill in the accounting amount

Selection What can I do for you?

SAVE CLOSE

Product	Price	Residue	Available	Quantity for order
AirPods	0.00	48.00	48.00	47.00
Apple iPhone 14 Pro	1,050.00	32.00	32.00	35.00

## 6. In the products, fill in the columns

PRODUCTS ATTACHMENTS AND NOTES FEED

Product in Warehouse operation + : Product selection Fill in the accounting amount

Barcode	Product	Series	Quantity counted	Number per fact	Difference
12585	AirPods	1000	48.00	48.00	-1.00
3222	Apple iPhone 14 Pro	3200	32.00	32.00	1.00

## 7. Click on "Save"

Inventory/IH3/01-02-2023

SAVE CANCEL ACTIONS

## 8. Click on "Actions", select "Align the warehouse"

Inventory/IH3/01-02-2023

SAVE CANCEL ACTIONS

- Follow the feed
- Set up access rights
- Fill product
- Align the warehouse

Expected result: A modal window appears with the message "Done"

Done

OK

## 9. Go to the section "Warehouse operations"

Expected result: The document "Arrival" and "Expenditure" was created  
Because one product had a shortage, and the other was in a plus

## 10. "Receipt" is created if there was a product shortage in the inventory

Warehouse operations ☰ 🗨️ What can I do for you? Creatio

NEW FOLDER NEW ACTIONS VIEW

Filters/folders × Tag

Name	Number	A type	date	Our company
Expenditure/RANK-15/01-02-2023	RANK-15	Expenditure	2/1/2023	Our company
Arrival/PN-22/01-02-2023	PN-22	Arrival	2/1/2023	Our company
Inventory/IHB3/01-02-2023	IHB3	Inventory	2/1/2023	Our company

OPEN COPY DELETE

11. Open the "Receipt" page

Arrival/PN-22/01-02-2023 PN-22 Arrival 2/1/2023 Our company

OPEN COPY DELETE

Expected result: The product in which there was a shortage is displayed, and this document is "Conducted"

Receipt/PRNK-20/06-02-2023 What can I do for you? Creatio

CANCEL CLOSE ACTIONS PRINT VIEW

Number	PRNK-20	Type	Receipt	Name	Receipt/PRNK-20/06-0...
Order	ORD-101	Date	2/6/2023	Conducted	<input checked="" type="checkbox"/>
Provider	Precision Systems	Warehouse*	East Warehouse	Official	<input checked="" type="checkbox"/>
Our company*	Our company	Parental Document		Currency Rate	1.00
Price List*	Base	Amount	1,600.00	Currency	US Dollar
		Primary Amount	1,600.00		

< PRODUCTS OPERATIONS ATTACHMENTS AND NOTES FEED

Products + : Product selection

Barcode	Product	Series	Warehou...	Number ...	Quantity	Price (wit...	T...	Tax amount	Discount...	Total (wit...
1111	Air Pods	1212121	1/1-1/3	3	5,000	120.00	20.00	120.00	0.00	600.00
6666669	ZTE	858585	1/1-1/1	1	20,000	50.00	20.00	200.00	0.00	1,000.00

12. "Expenditure" is created if the "Quantity counted" of the product in the inventory is greater than the "Number per fact"

13. Open the "Expenditure" page

Name	Number	A type	date	Our company
Expenditure/RANK-15/01-02-2023	RANK-15	Expenditure	2/1/2023	Our company

OPEN COPY DELETE

Expected result: A product with a plus is displayed, and this document is "Conducted"

CANCEL CLOSE ACTIONS

PRINT VIEW

Number RANK-15 A type Expenditure Name Expenditure/RANK-15/01-02-2023

Order date 2/1/2023 Price list\* Procurement

Account Our company\* Our company

Contract Stock\* Central Warehouse Parent document Inventory/IHB3/01-02-2023

Amount 0.00 Conducted

The sum b.c. 36,750.00 Service

Course 1.00

Currency US Dollar

PRODUCTS OPERATIONS ATTACHMENTS AND NOTES FEED

Product	Series	Warehouse lo...	Quantity	Price (with VAT)	Unit of measure	Discount, %	Total (with VAT)	Barcode
AirPods	1000		1.000	0.00		0.00	0.00	12585

### Section "Routes"

1. Open "Routes" section
2. Click on the "New" button



Expected result: The "Routes" page opens

3. Fill in the fields in the header of the page:

Field	Value	Note
Name	Delivery of medicines	Name of the route
Weight in the car	5.00	Specify the weight of the cargo
Overload	0.00	Specify whether there is an overload
Volume in car	1,6	
Notes	There is glass, be careful!	
Forwarder	Symon Clarke	Choose a forwarder from the "Contacts" directory
State of transport		
Car		

Driver	William Walker	Choose a driver from the "Contacts" directory
Date of delivery	3/1/2023	Select the required date
Time of departure along the route	9:00 AM	Select the required time
Return time from the route	9:00 PM	Select the required time

Name*	Delivery of medicines	Forwarder	Symon Clarke	Date of delivery	3/1/2023
Weight in the car	5.00	State of transport		Time of departure along the route	9:00 AM
Overload	0.00	Car		Return time from the route	9:00 PM
Volume in car	1.60	Driver	William Walker		
Notes	There is glass, be careful!				

#### 4. Click on "Save"

Delivery of medicines

SAVE CANCEL ACTIONS

#### 5. Add "Delivery"

[DELIVERY DOCUMENTS](#)
[ATTACHMENTS AND NOTES](#)
[FEED](#)

Delivery +

Expected result: "Delivery" page opens

24 What can I do for you? Creatio 8.0.5.2483 Debug VIEW

CLOSE ACTIONS

Number*	24	Warehouse operation		Sender Contact	
Our company		Account address		Sender address	
Account		Shipping address		Recipient's address	
Delivery type		Declaration number		Recipient Contact	
Delivery date (plan)				Postal company	
Delivery date (fact)				Warehouse	
Delivery status					

[PRODUCTS](#)
[INFORMATION FOR LOGISTICS](#)
[CONNECTIONS](#)
[FEED](#)

- Product in delivery
- Warehouse operations in delivery Upload products to the "Products" detail
- Delivery orders Upload products to the "Products" detail

Активация Windows  
Перейдіть до розділу "Настройки", що активувати Windows.

#### 6. Fill in the fields in the header of the page:



<b>Field</b>	<b>Value</b>	<b>Note</b>
Number	21	Autocomplete
Our company	Our company	The account from which the product was purchased
Account	Build Technologies	Account pending delivery
Type of delivery	Customer pickup	Choose the type of delivery
Delivery date (plan)	3/1/2023	Specify the planned delivery date
Delivery date (fact)	3/1/2023	Specify the actual delivery date
Delivery Status	Planned	Select delivery status
Warehouse operation	Expenditure/RANK-14/31-01-2023	Choose from the directory "Warehouse operation"
Address of the Accounts		Select "Account address" from the directory
Shipping address		Select "Account address" from the directory
Declaration number	9112	specify the number
Sender Contact	Megan Lewis	Select "Contact" from the directory
Sender address	St.Vyhovsky 97	Specify the address
Recipient's address	St.Vyhovsky 5B	Specify the address
Contact of the recipient	Christine Nelson	
Postal company	Build Technologies	
Warehouse	Central Warehouse	

21

What can I do for you? >

SAVE CANCEL ACTIONS

PRINT

Number* 21	Warehouse operation Expenditure/RANK-14/31-01-2023	Sender Contact Megan Lewis
Our company Our company	Address of the Accounts	Address St.Vyhovsky 97
Account Build Technologies	Shipping address	Address St.Vyhovsky 5B
Type of delivery Customer pickup	Declaration number 9112	Contact of the recipient Christine Nelson
Delivery date (plan) 3/1/2023		Postal company Build Technologies
Delivery date (fact) 3/1/2023		Warehouse Central Warehouse
Delivery Status Planned		

< PRODUCTS INFORMATION FOR LOGISTICS CONNECTIONS FEED

Product in delivery + : No data

Warehouse operations in delivery + : Upload products to the "Products" detail No data

### 7. Click on "Save"

21

SAVE CANCEL ACTIONS

Expected result: The "Route" page shows the "Delivery" created

Delivery of medicines

What can I do for you? > Creatio

CLOSE ACTIONS

PRINT VIEW

Name* Delivery of medicines	Forwarder Symon Clarke	Date of delivery 3/1/2023
Weight in the car 5.00	State of transport	Time of departure along the route 9:00 AM
Overload 0.00	Car	Return time from the route 9:00 PM
Volume in car 1.60	Driver William Walker	
Notes There is glass, be careful!		

< DELIVERY DOCUMENTS ATTACHMENTS AND NOTES FEED >

Delivery + :

Number	Warehouse operation	Counterparty	Type of delivery
21	Expenditure/RANK-14/31-01-2023	Build Technologies	Customer pickup

## Section "Deliveries"

**Note:** for delivery of goods from orders or warehouse operations

1. Open "Deliveries" section
2. Click on the "New" button

24

What can I do for you? >

Creatio  
8.0.5.2483 Debug  
VIEW ▾

CLOSE ACTIONS ▾

Number\*  
24

Our company

Account

Delivery type

Delivery date (plan)

Delivery date (fact)

Delivery status

Warehouse operation

Account address

Shipping address

Declaration number

Sender Contact

Sender address

Recipient's address

Recipient Contact

Postal company

Warehouse

< PRODUCTS INFORMATION FOR LOGISTICS CONNECTIONS FEED >

Product in delivery

Warehouse operations in delivery [Upload products to the "Products" detail](#)

Delivery orders [Upload products to the "Products" detail](#)

Активация Windows  
Перейти по ссылке "Настройки"

Expected result: The "Delivery" page opens

3. Fill in the fields in the header of the page:

Field	Value	Note
Number	22	Autocomplete
Our company	Our company	The account from which the product was purchased
Account	Build Technologies	Account pending delivery
Type of delivery	Customer pickup	Choose the type of delivery
Delivery date (plan)	3/1/2023	Specify the planned delivery date
Delivery date (fact)	3/1/2023	Specify the actual delivery date
Delivery Status	Planned	Select delivery status
Warehouse operation	Expenditure/RANK-14/31-01-2023	Choose from the directory "Warehouse operation"
Address of the Accounts		Select "Account address" from the directory
Shipping address		Select "Account address" from the directory

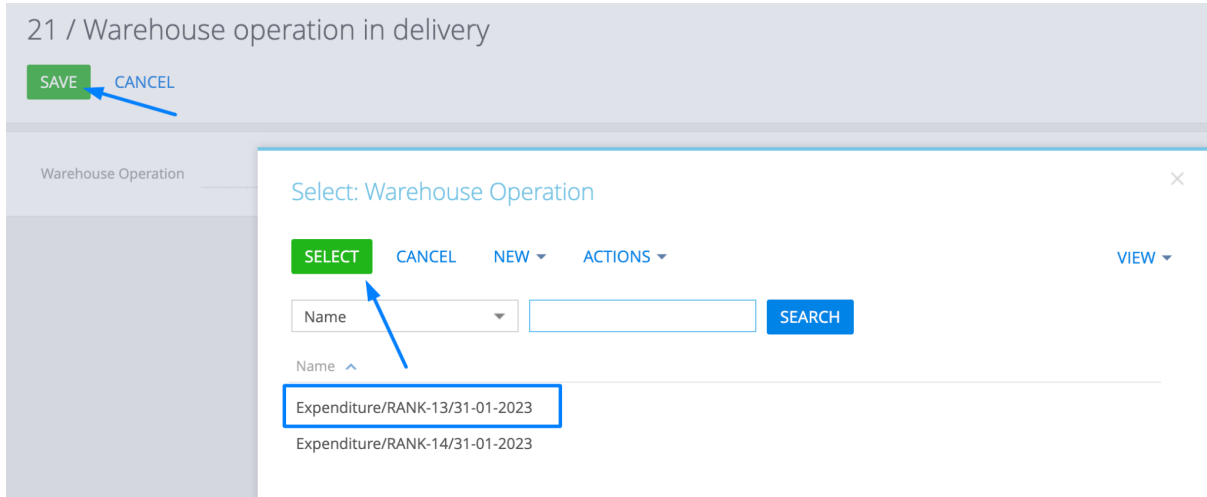
Declaration number	9112	specify the number
Sender Contact	Megan Lewis	Select the sender's contact from the "Contacts" directory
Sender address	St.Vyhovsky 97	Specify the address
Recipient's address	St.Vyhovsky 5B	Specify the address
Contact of the recipient	Christine Nelson	Select Contact of the recipient from the "Contacts" directory
Postal company	XT Group	Choose a postal company from the "Account" directory
Warehouse	Central Warehouse	Selection from warehouses

#### 4. Click on "Save"

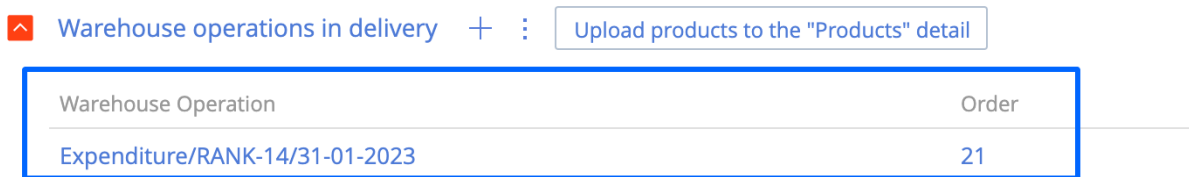
#### 5. In the "Product in delivery" detail, you can add products yourself via "+"

Product	Quantity	Barcode
Apple iPhone 14 Pro	1.000	126923

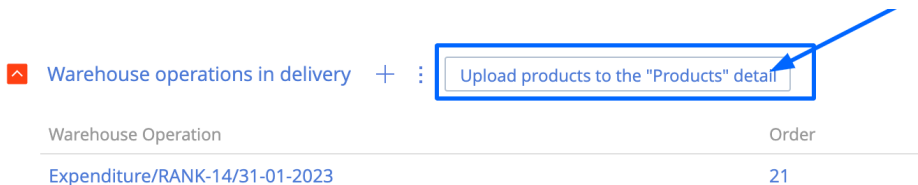
- In the "Warehouse operations in delivery" details, select the operation from which the delivery will be made



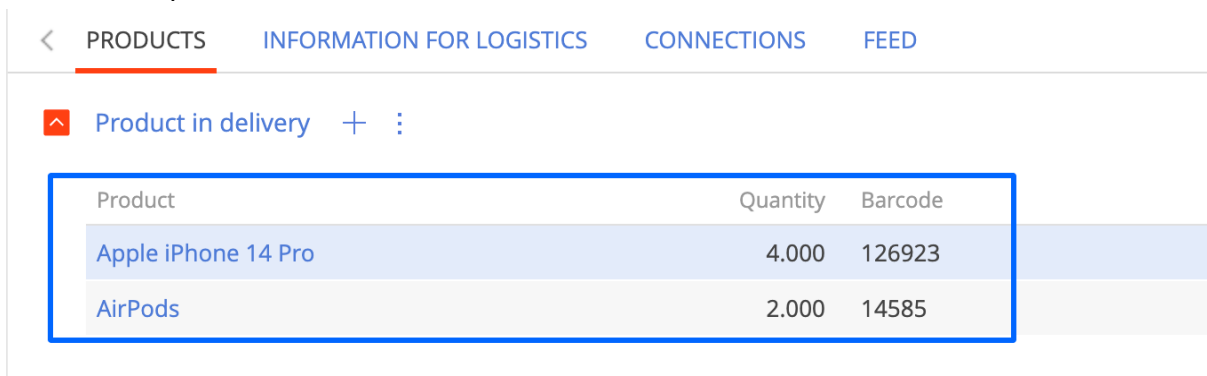
Expected result: The selected operation is added



- In the "Warehouse operations in delivery" detail, click on the button "Upload products to the "Products" detail"



Expected result: In the detail "Product in delivery" are added goods that were in the warehouse operation



8. In the "Delivery orders" details, select the operation from which the delivery will be made

The screenshot shows the 'Delivery orders' interface. At the top, there is a header '21 / Order in delivery' and buttons for 'SAVE' and 'CANCEL'. Below this, a modal window titled 'Select: Order' is open. The modal has a 'SELECT' button highlighted with a blue arrow. Below the modal title, there are buttons for 'CANCEL', 'NEW', and 'ACTIONS'. A search bar with 'Order number' and a 'SEARCH' button is present. A table lists several orders with columns for 'Number', 'Date', and 'Account'. The row for 'ORD-24' is highlighted with a blue box and a blue arrow pointing to it.

Number	Date	Account
ORD-28	2/2/2023 1:23 PM	Build Technologies
ORD-27	2/2/2023 1:15 PM	Build Technologies
ORD-26	2/1/2023 11:15 AM	Build Technologies
ORD-25	2/1/2023 9:04 AM	Build Technologies
ORD-24	1/31/2023 9:57 AM	Build Technologies
ORD-23	1/31/2023 8:59 AM	Build Technologies
ORD-22	1/30/2023 11:52 PM	Build Technologies
ORD-34	8/7/2022 3:00 AM	Build Technologies

Expected result: The selected order is added

The screenshot shows the 'Delivery orders' interface. At the top, there is a header 'Delivery orders' and a button for 'Upload products to the "Products" detail'. Below this, a table lists several orders with columns for 'Order' and 'Delivery'. The row for 'ORD-24' is highlighted with a blue box and a blue arrow pointing to it.

Order	Delivery
ORD-24	21

9. In the "Delivery orders" detail, click on the button "Upload products to the "Products" detail"

The screenshot shows the 'Delivery orders' interface. At the top, there is a header 'Delivery orders' and a button for 'Upload products to the "Products" detail' highlighted with a blue box and a blue arrow pointing to it.

Expected result: In the detail "Products" are added the goods that were in the order

The screenshot shows the 'Products' interface. At the top, there is a header 'Product in delivery' and a button for 'Upload products to the "Products" detail'. Below this, a table lists several products with columns for 'Product', 'Quantity', and 'Barcode'. The row for 'Apple iPhone 14 Pro' and 'AirPods' is highlighted with a blue box and a blue arrow pointing to it.

Product	Quantity	Barcode
Apple iPhone 14 Pro	7.000	126923
AirPods	4.000	14585

## 10. Fill in the group of fields "Information for logisticians"

[PRODUCTS](#) [INFORMATION FOR LOGISTICS](#) [CONNECTIONS](#) [FEED](#)

---

Weight, kg 
 Volume (cubic meter)

Route 
 Based on the unit of measurement

## 11. Fill in the "Connections" field group, if any

[PRODUCTS](#) [INFORMATION FOR LOGISTICS](#) [CONNECTIONS](#) [FEED](#)



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Connections



Order 
 Shipping document

## Section "Price settings"


1. Open "Price settings" section
2. Click on the "New" button

Price setting  

NEW ACTIONS

 Filters/folders  Tag

Expected result: The "Price settings" page opens

New record What can I do for you?  VIEW

SAVE CANCEL ACTIONS

Name\* 
 Pricing start date

Price List 
 Currency\*

Percent change

---

[MAIN](#) [ATTACHMENTS AND NOTES](#) [FEED](#)

---

Products + : Fill Change by percent

No data

3. Fill in the fields in the header of the page:

Field	Value	Note
-------	-------	------

Name	10% price increase	Fill in the name
Price List	Partner Bronze	Selection from the directory "Price lists"
Currency	US Dollar	Selection from the directory "Currencies"
Percent change	10	Specify % markup
Pricing start date	2/4/2023	Specify the date

#### 4. Click on "Save"

10% price increase What can I do for you? >

**SAVE** CANCEL ACTIONS

---

Name\* 10% price increase Pricing start date 4/21/2023 11:29 AM  
 Price List Base Currency\* US Dollar  
 Percent change 10.00

---

< MAIN ATTACHMENTS AND NOTES FEED

Products + :

Name	New Price ▼	Old price	Product	Custom product
Klarstein	8,888.00	8,888.00	Klarstein	
Modern Expro	3,000.00	3,000.00	Modern Expro	
Apple iPhone 14 Pro	1,200.00	1,200.00	Apple iPhone 14 Pro	
Apple iPhone 14 Pro	1,200.00	1,200.00	Apple iPhone 14 Pro	
Air Pods	120.00	120.00	Air Pods	
ZTE	50.00	50.00	ZTE	Активация Wind
Fairy	20.00	20.00	Fairy	Перейдіть до розділу активувати Windows.

#### 5. In the "Products" data, click "Fill"

< MAIN ATTACHMENTS AND NOTES FEED

Products + :

No data

Expected result: products with the selected price list are added



Products + : Fill Change by percent

Name	New Price	Old price	Product	Custom product
Laptop Acer Aspire P3-171-5333Y4G12AS (NX.M8NEU.003)	11,395.80	11,395.80	Laptop Acer Aspire P3-171-5333Y4G12AS (NX.M8NEU.003)	
Laptop ASUS ZenBook UX301LA-C4080H (90NB0191-M04290)	2,575.55	2,575.55	Laptop ASUS ZenBook UX301LA-C4080H (90NB0191-M04290)	
Laptop DELL XPS 12 (X27852NIW-24)	2,495.48	2,495.48	Laptop DELL XPS 12 (X27852NIW-24)	
Laptop DELL Inspiron 7348 (I73585NIW-45)	1,517.34	1,517.34	Laptop DELL Inspiron 7348 (I73585NIW-45)	
Apple iPhone 14 Pro	1,150.00	1,150.00	Apple iPhone 14 Pro	
Laptop ASUS ZenBook UX303LA-RO261H (90NB04Y1-M03990)	1,147.65	1,147.65	Laptop ASUS ZenBook UX303LA-RO261H (90NB04Y1-M03990)	
Graphics Card MSI GTX 980TI 6GD5	944.98	944.98	Graphics Card MSI GTX 980TI 6GD5	
Motherboard UT165LZ-32P1 (sample)	810.00	810.00	Motherboard UT165LZ-32P1 (sample)	
Battery Back-up System APC Smart-UPS C 1500VA LCD (SMC1500I)	796.72	796.72	Battery Back-up System APC Smart-UPS C 1500VA LCD (SMC1500I)	
Motherboard ASUS X99-DELUXE	679.03	679.03	Motherboard ASUS X99-DELUXE	
Intel Core i7-4930K	657.00	657.00	Intel Core i7-4930K	
Processor Intel Core i7-4770K BX80646I74770K	572.53	572.53	Processor Intel Core i7-4770K BX80646I74770K	

6. In the "Products" data, click "Change by percent"

Products + : Fill Change by percent

Expected result:

- the "new price" column is filled

Name	New Price	Old price	Product	Custom product
Klarstein	9,776.80	8,888.00	Klarstein	
Modern Expro	3,300.00	3,000.00	Modern Expro	
Apple iPhone 14 Pro	1,320.00	1,200.00	Apple iPhone 14 Pro	
Apple iPhone 14 Pro	1,320.00	1,200.00	Apple iPhone 14 Pro	
Air Pods	132.00	120.00	Air Pods	
ZTE	55.00	50.00	ZTE	Активация Windows Перейдіть до розділу "На активувати Windows."
Fairy	22.00	20.00	Fairy	

- on the product page, the price changes according to the specified price list, when "Pricing Start Date" is indicated on the "Price settings" page

Starting from 4/21/2023 11:29 AM, products with Price List - "Base", the price will change

10% price increase What can I do for you? >

SAVE CANCEL ACTIONS

Name\* 10% price increase

Price List Base

Percent change 10.00

Pricing start date 4/21/2023 11:29 AM

Currency\* US Dollar