

How to Create Products

This video will show to users how to Create Products

Navigate to Inventory, Products, Create New.
Fill in the mandatory info, i.e. Name, Code, Base UOM, Brand.

STEP-BY-STEP:

1. Go to Inventory menu
2. Select Products
3. Click Create New Products at the top right side
4. Fill in the header info, i.e. Name, Part Number, Base UOM, Brand, etc.
(mandatory fields in red color or marked with red x)
Click Save button when done.
5. Click the Confirm Product button or tick on the checkbox "Is Active".
The product is now available for transactions.
6. In the Product Image tab, click on Attach button to attach an image for the product.
Click OK button in the Upload Form window to upload the image file.
Click Delete button in the Product Image tab to delete the image file.
User can also zoom in or zoom out the image.
7. Pricing tab will display the product's price lists: Sales, Purchase, and Product Standard Cost
8. Account Settings tab will display all the Account Settings for the product.
User can also modify the setting to define specific account to use for posting of the product.
9. User may assign which branch for the product in the Assigned Branch tab.
A default branch will be automatically assigned.
10. User may add notes or attachments for the product in the Notes / Attachments tab.
Enter the Title and Description for note, press + button to attach a file.
Click Save button when done.
11. Stock tab will display which warehouses have stock of this product, and the status (i.e. on hand, reserved, in transit, etc).
12. Usage tab will display where the product is used as part of product assembly.
13. In the Products List View, right click on one of

the products to see the available options for it.
For example, user can move the product to another
Account Category.

14. At the bottom of the Products List View, user can
use select the parameter to filter the products list
to show active or inactive products.

15. User able to import and export product data using
csv file (buttons on the top right of the list view).
Export the data from an existing one to use as a
template.
