How to Create Trading Terms

The video will show the user how to create Trading Terms

Navigate to Sales, Trading Terms, Create New Trading Term.
Fill in the header info, i.e. Code, Name, Price List, Account Setting, Validity Period.
Click Confirm and then Approve.

STEP-BY-STEP:
1. Go to Sales menu
2. Select Trading Terms
3. Create New Trading Term
4. Fill in the header info, i.e. Code, Name, Price List, Account Setting, Validity Period.
(mandatory fields in red color or marked with red x)
Note: Customers' Currency and Tax Type (Price Includes / Excludes Tax) determine whether they can use this Trading Term.
5. Click Save button to save the new trading term.
6. Add Products and their price in the table below (Product # and List Price).
User may filter the list of products by the Product Brand.
Click + button or press ENTER to enter each line of data and saving the price list.
7. User able to import and export trading term data using csv file.
Export the trading term data from an existing one to use as a template.
8. User can assign which customers for the trading term in the Customers List tab.
Select customer(s) from the list in the left table and click the Right Arrow button to assign it to the trading term.
Select customer(s) from the list in the right table and click the Left Arrow button to unassign it off the trading term.
9. User may assign which branch for the price list in the Assigned Branch tab.
A default branch will be automatically assigned.
10. User can view the margin for the trading term in the Margin Details tab.

11. User may add notes or attachments for the price list in the Notes / Attachments tab.
Enter the Title and Description for note, press + button to attach a file. Click Save button when done.
12. In the Products List tab, right click on a product line to show available options.
Choose “Show Product Details” to view the Product master record.
13. Click Confirm Trading Term button in the Products List tab when done editing
14. Click Approve Trading Term button to approve the trading term.
It will now be available in the Sales modules transactions and reports.