

Short sales, orders, and invoices

Version 7.17



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Create an order

PRODUCTS: SALES ENTERPRISE SALES COMMERCE

In Creatio, you can add installment plans, product lists, discounts and other data.

To do this:

1. Open the [*Orders*] section.
2. Click [*New order*].
3. On the page that opens, specify the order recipient in the [*Customer*] required field. In the field, you can select a value from the existing contacts and accounts.
4. Go to the [*Products*] detail and add a list of goods and services included in the order. There are several methods of doing this:
 - a. Click + to open the product selection page.
 - b. Quick action menu of the  button → [*Add*].

If necessary, add a discount on specific products in the [*Discount,%*] field. Learn more in the “[Add products to an invoice or an order](#)” article.

As a result, the total cost of the order will be calculated in the [*Amount*] column.

5. Go to the [*Order details*] tab and add an order installment plan. You can populate the installment plan either manually or via a template. Learn more in the “[Add an order installment plan](#)” article.
6. You can submit orders for approval to other Creatio users (e.g., approve order amount with managers) using the standard approval function. To do this, use the [*Send for approval*] action on the order page. The action opens an additional page, where you can select an employee that the document is sent to, and set other approval parameters. More information about this feature is available in the “[Approvals](#)” article.

After adding any data to any detail, the order will be autosaved. The order number is generated automatically in accordance with the “Order number mask” system setting (OrderCodeMask).

Create an invoice

PRODUCTS: SALES ENTERPRISE SALES COMMERCE

In Creatio, you can add and issue invoices. Invoices contain information about the customer, supplier, connected contract as well as the products in the order, the order amount, and the payment conditions. Aside from creating an invoice manually, you can automatically add an invoice based on an order - both for all its products in general, and for specific steps of the installment plan based on payment.

Use the [*Invoices*] section to work with invoices. The section supports the following [quick filters](#):

- By invoice issue date (the [*Date*] field of the invoice page).
- By owner (the [*Owner*] field of the invoice page).

Create an invoice from the [Invoices] section

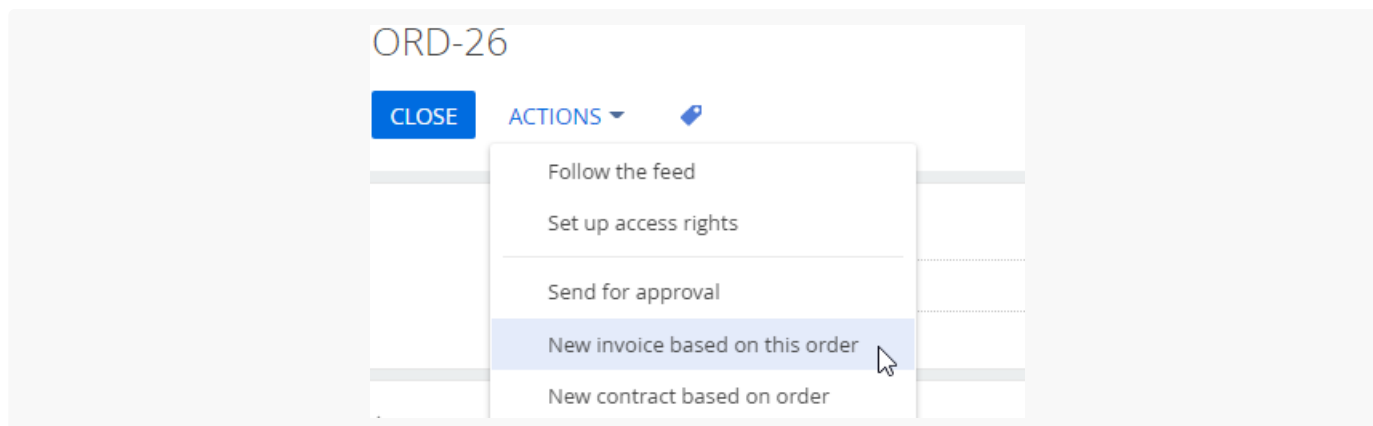
1. Open the [*Invoices*] section.
2. Click [*New invoice*].
As a result, a page with the invoice number will open. The number is generated in accordance with the “Invoice number mask” system setting (InvoiceCodeMask).
3. Specify the customer to whom the invoice is issued in the [*Customer*] required field. In the field, you can select a value from the existing contacts and accounts.
4. The [*Customer details*] field becomes available if the customer account is selected on the invoice page. If the selected company has only one record on this detail, then the [*Banking details*] field will be automatically filled in with that data.
5. In the [*Supplier*] field, specify the company that is the source of the invoice.
6. The [*Amount*] field value features the total cost of the ordered products calculated automatically. The field is editable if the [*Products*] details has no records. The amount can be specified in any currency.
7. On the [*Payment*] detail, specify the order payment status, either planned or actual.
8. Add other records relevant to the record on the [*Connected to*] detail.
9. Select the [*Owner*] checkbox in the [*Reminders*] detail to create a reminder for the owner of the invoice. The reminder will be displayed on the [communication panel](#) when the specified point in time is reached.
10. Add the list of goods and services included in the order on the [*Products*] detail. There are several methods of doing this:
 - a. Click **+** to open the product selection page.
 - b. Click [*Add*] in the detail action menu.
If necessary, add a discount on specific products in the [*Discount,%*] field. Learn more in the “[Add products to an invoice or an order](#)” article.
11. If you need to agree and approve an invoice (e.g., approve invoice amount with managers), use Creatio approvals. To do this, use the [*Send for approval*] action on the invoice page. As a result, a page will open. Use it to select an employee to send the invoice to and define other approval parameters. More information about this feature is available in the “[Approvals](#)” article.

Issue an invoice based on an order

To create an invoice based on an order:

1. Go to the [*Orders*] section and open the required record.
2. Select the [*New invoice based on this order*] action from the [*Actions*] menu ([Fig. 1](#)).

Fig. 1 Adding contract based on order



As a result, the page with the invoice created based on the order will open. The fields will be populated using the order data like this:

1. The [*Products*] detail is filled with all products from the corresponding detail of the order.
2. The [*Customer*] and [*Owner*] fields are filled in with the values from the corresponding fields from the order page.
3. The [*Amount*], [*Amount, base currency*] values of the invoice page are calculated as the total cost of the products.
4. The number of the connected order is displayed in the [*Order*] field.

Also, the invoice number is generated automatically on the contract page according to the “Invoice number mask” system setting (InvoiceCodeMask). The [*Start date*] field is filled in with the current date, the [*Payment status*] field will contain “Draft” and the [*Supplier*] field is filled in with the “Our company” account type.

Issue an invoice based on a payment in the order

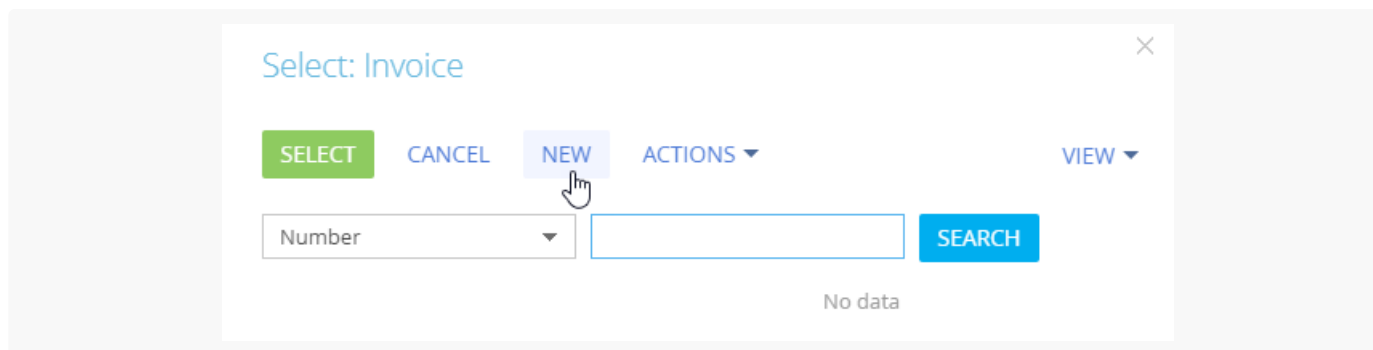
Add an invoice automatically based on any step of the order installment plan with the “Payment” type in Creatio. To do this:

1. Go to the [*Orders*] section and open the required record with the populated [*Installment plan*] detail.

Note. Learn more about creating an order installment plan in the “[Add an order installment plan](#)” article.

2. Click the [*Order details*] tab.
3. Select the needed step with the “Payment” type and click 🔍 in the [*Invoice*] column.
In the opened lookup window, issue a new invoice for an installment plan step ([Fig. 1](#)) or bind an installment plan step to an existing connected invoice.

Fig. 1 Adding an invoice



After adding an invoice, a link with the invoice number will be displayed in the detail list. Click the link to open the invoice page (Fig. 2).

Fig. 2 Opening the invoice page

Type	Deferment...	Due date	Actual date	Percentage, %	Product	Expected amount	Actual amount	Invoice
Payment	0	26.05.2015	27.05.2015	50,00	Add	50 000,00	50 000,00	12
Delivery	5	01.06.2015	31.05.2015	100,00	1 product	100 000,00	100 000,00	
Payment	2	02.06.2015	01.06.2015	50,00	Add	50 000,00	50 000,00	Add

An invoice page that was added based on the data from the installment plan step is filled in automatically with the following data from the order page:

1. If you add products to an installment plan step, they will be automatically added to the [*Products*] detail of the corresponding invoice.
2. The value in the [*Amount*] field on the invoice page can be calculated in two ways:
 - a. If the products were not added at the corresponding step, the [*Amount*] field of the invoice page will be populated with the corresponding value from the [*Expected amount*] field from the installment plan step.
 - b. If the products were not added at the corresponding step, the [*Amount*] field of the invoice page will be calculated as the total cost of the selected products.
3. The [*Customer*] and [*Owner*] fields are filled in with the values from the corresponding fields from the order page.
4. The number of the connected order is displayed in the [*Order*] field.

Also, the invoice number is generated automatically on the contract page according to the pre-configured mask. The [*Start date*] field is filled in with the current date, the [*Payment status*] field will contain "Draft" and the [*Supplier*] field is filled in with the "Our company" account type.

Add an order installment plan

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Creatio enables you to add an individual installment plan on the [*Order details*]

You can populate the installment plan either manually or automatically, based on the previously added template. For example, if your company uses a product delivery scheme of 50% prepayment from the cost of the products in the order, you can [set](#) the corresponding template of the installment plan and use it on the order page.

Populate the installment plan

Arrange the delivery and payment of goods at the stage of order processing. To do this:

1. Open the corresponding order page, go to the [*Order details*] tab.
2. On the [*Installment plan*] detail, click [+](#) and select [*Add process step*].
3. Populate each installment plan step:
 - a. [*Type*] - "Delivery" or "Payment."
 - b. [*Name*] - specify the step name, for example, "Prepaid" or "Full delivery."
 - c. [*Deferment (days)*] - specify the number of days to calculate the obligation due date, starting from the date of the previous entry.
 - d. [*Products*] - specify products to pay or deliver during this step. Click the link to open the product [distribution window](#) where you can edit the list of products for the current step.
 - e. [*%*] - specify the expected delivery or payment amount in percentage.
 - f. [*Invoice*] - select or [add an invoice](#) connected with the current step of the installment plan. The field is editable when the "Payment" step is selected.
4. Click to save the step values.

The value of the [*Due date*] field is calculated automatically depending on the previous entry date and the number of deferment days. The value of the [*Expected amount*] field is calculated as the amount of the remaining balance for payments and deliveries within the order.

Set the actual dates and amounts as the order progresses. If you change the timeframe of an existing step, all timeframes of the subordinate steps will be recalculated automatically. Creatio will help calculate the expected amount within the entry as a remaining balance of the order payments and deliveries.

Use the installment plan templates

You can populate the [*Installment plan*] detail of the order page automatically based on the previously added template. There is a possibility to use a certain template by default or select one from the pre-set templates.


Note. It is recommended to populate the installment plan for the orders with the formed list of products and services on the [*Products*] detail.

Set a template for the installment plan

Use the [*Installment plan templates*] lookup to set the installment plan template.

Case. For example, set up a template for a three-step installment plan:


1. 50% prepayment
2. Complete delivery of all items within 5 days
3. Payment of the remaining 50% on the next day after delivery.

1. Open the System Designer by clicking  in the top right corner of the application window.
2. Go to the [*System setup*] block -> click [*Lookups*].

Note. You can set up access rights to this action using the [*Access to “Lookups” section*] [system operation](#).

3. Select the [*Installment plan templates*] lookup and click the [*Open content*] button.
4. On the opened page, click the [*Add*] button.
5. Specify the caption of the new template, for example, “50% prepayment”.
6. Click the + button of the [*Installment plan template steps*] detail.

Note. The [editable list](#) is used on the [*Installment plan template steps*] detail.

7. Specify the parameters of the first step:
 - a. Specify the “Payment” step type.
 - b. Specify the step caption, for example, “Prepaid”.
 - c. Select the “Fixed date” deferment type.
 - d. Specify the payment of 50% of the total cost.
 - e. Save the changes by clicking the  button.
8. Add the second “Full delivery” step and specify its parameters.
9. Add the third “Full payment” step and specify its parameters.

As a result of setting up the “50% prepayment” template, the [*Installment plan template steps*] detail will be shown as in [Fig. 1](#).


Fig. 1 Example of the installment plan for the “50% prepayment” scheme

Тип	Name	Type	Deferment..	Percentage, %	Previous entry
Payment	Full payment	Actual deferment	1	50.00	Full delivery
Delivery	Full delivery		5	100.00	Prepaid
Payment	Prepaid	Payment		50.00	

You can set up several installment plan templates according to the working process of your company. For example, create a template for the 100% prepayment scheme with monthly payments during the year that can be implemented in several steps.

Use a default template

To automatically generate an installment plan on the order page using a default template:

1. Open the System Designer by clicking  in the top right corner of the application window.
2. Click [*System settings*] in the [*System setup*] block.
3. Open the page of the [*Default installment plan template*] system setting.
4. In the [*Default value*] field, select one of the previously configured templates that will be used on the order page by default.

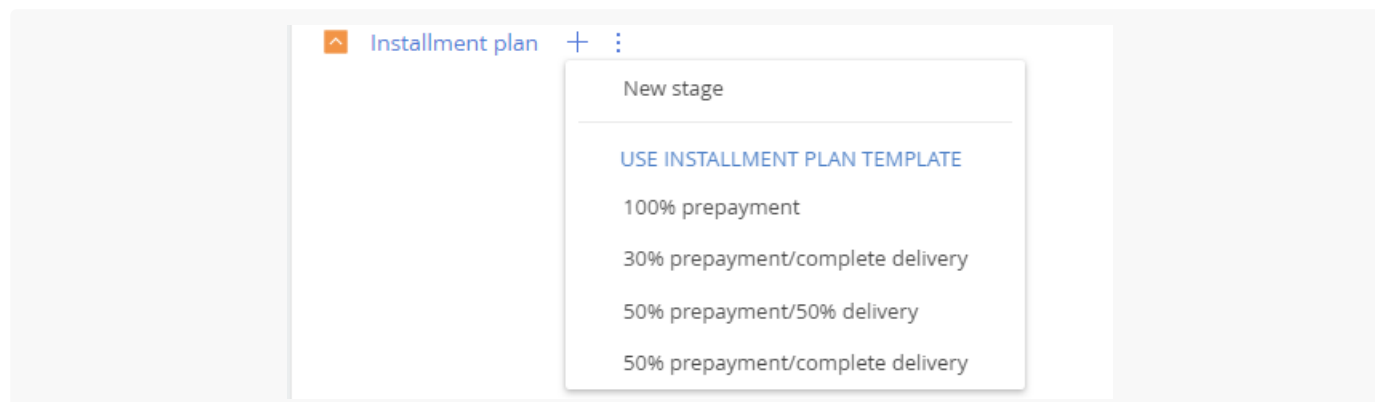
As a result, while adding a new order and saving the order page, the [*Installment plan*] detail will be automatically filled in according to the default template.

Select the template manually

To manually add the installment plan on the order page using a selected template:

1. Go to the [*Orders*] section and open the required record.
2. On the [*Installment plan*] detail, click the **+** button and select the required installment plan template from the list of available templates, for example, "50% prepayment" ([Fig. 1](#)).

Fig. 1 Selecting the template for the installment plan auto-fill



As a result, the [*Installment plan*] detail will be filled in automatically according to the selected template.

To replace an existing installment plan template, select a template from the list (the **+** button). As a result, the installment plan will be formed according to the new template on the [*Installment plan*] detail (previous installment plan will be deleted). If invoices have been issued based on the original installment plan steps, they will need to be connected to the corresponding steps of the new installment plan.

How the values are calculated when using a template

Upon filling in the [*Installment plan*] detail of the order page using the template, the following automatic calculations are performed:

- The planned end date for each step is calculated against the current date with the number of deferment days specified in the template;
- If the [*Products*] detail has already been filled in previously on the order page, then the expected amount will be distributed by the steps according to the share and the total cost of the products specified in the template ([Fig. 1](#)).

Fig. 1 Example of filling in the [*Installment plan*] detail using the template

Type	Deferment	Due date	Actual date	Percentage, %	Expected amount	Actual amount
Payment	0	13/06/2015		50.00	25,000.00	0.00
Delivery	5	18/06/2015		100.00	50,000.00	0.00
Payment	1	19/06/2015		50.00	25,000.00	0.00

If needed, you can edit the detail manually, in this case, the values of the connected fields will be recalculated automatically. For example, upon changing the number of deferment days, the recalculation of the due date will take place and if you edit the percentage share of the payment or delivery, the expected amount will be redistributed ([Fig. 2](#)).

Fig. 2 Example of rescheduling values on the [*Installment plan*] detail

Type	Deferment...	Due date	Actual date	Percentage, %	Expected amount	Actual amount
Payment	0	13/06/2015		25.00	12,500.00	0.00
Delivery	5	18/06/2015		100.00	50,000.00	0.00
Payment	2	20/06/2015		75.00	37,500.00	0.00

Distribute the products by the installment plan steps

The product distribution for the last step of the installment plan is automated in Creatio. Also, you can quickly add products to the installment plan step manually directly from the [*Installment plan*] detail list.

Upon populating the installment plan via a template, Creatio will add products to the installment plan in two cases:

- If the step of this type is the only one. For example, 100% prepayment. In this case, all products added to the order will be included in this step.
- If the step of this type is the only one for which the products are not added. For example, if the delivery takes place during two iterations and you have added the required products manually for the first step of the delivery, the rest of the products will be distributed automatically for the second step.

Otherwise, you will need to add the products manually. To do this:

1. Go to the [*Orders*] section and open the required record with the generated list of products.
2. Populate the [*Installment plan*] detail on the order page. You can populate the [*Installment plan*] detail automatically using the pre-set template.
3. To add products to the list available on this step, click [*Add*] in the [*Products*] column ([Fig. 1](#)).

Fig. 1 Adding products to the installment plan step

Type	Deferment...	Due date	Actual date	Percentage, %	Product	Expected amount	Actual amount
Payment	0	13/06/2015		50,00	Add	0.00	50,000.00
Delivery	5	18/06/2015		100,00	4 products	0.00	100,000.00
Payment	2	20/06/2015		50,00	Add	0.00	50,000.00

As a result, an additional product distribution window ([Fig. 2](#)) will open. Select the products and enter their quantity.

Fig. 2 Product distribution window

Product	Quantity	Warehouse	Price, \$
Intel Core i5-4670K	1,00	1,00	15 000,00
Antivirus Kaspersky Internet Security 2010	0,00	1,00	0,00
Microsoft Office 2010 English	0,00	1,00	0,00
Motherboard Asus R9280X-DC2T-3GD5	0,00	1,00	0,00

Total: 15 000,00

The products that were added on the [*Products*] detail of the order page are available in the list.

The [*Available*] field value is based on the total number of the product items specified on the [*Products*] detail of the order page. If some of the products have been distributed at the previous steps of the installment plan, this value is subtracted from the total number of products in the order and the result is displayed in the [*Available*] column. The number of products at the step can not exceed the total number of products available.

The total cost of the specified number of products is calculated automatically based on the price per unit and the number of products.

Create a contract from an order

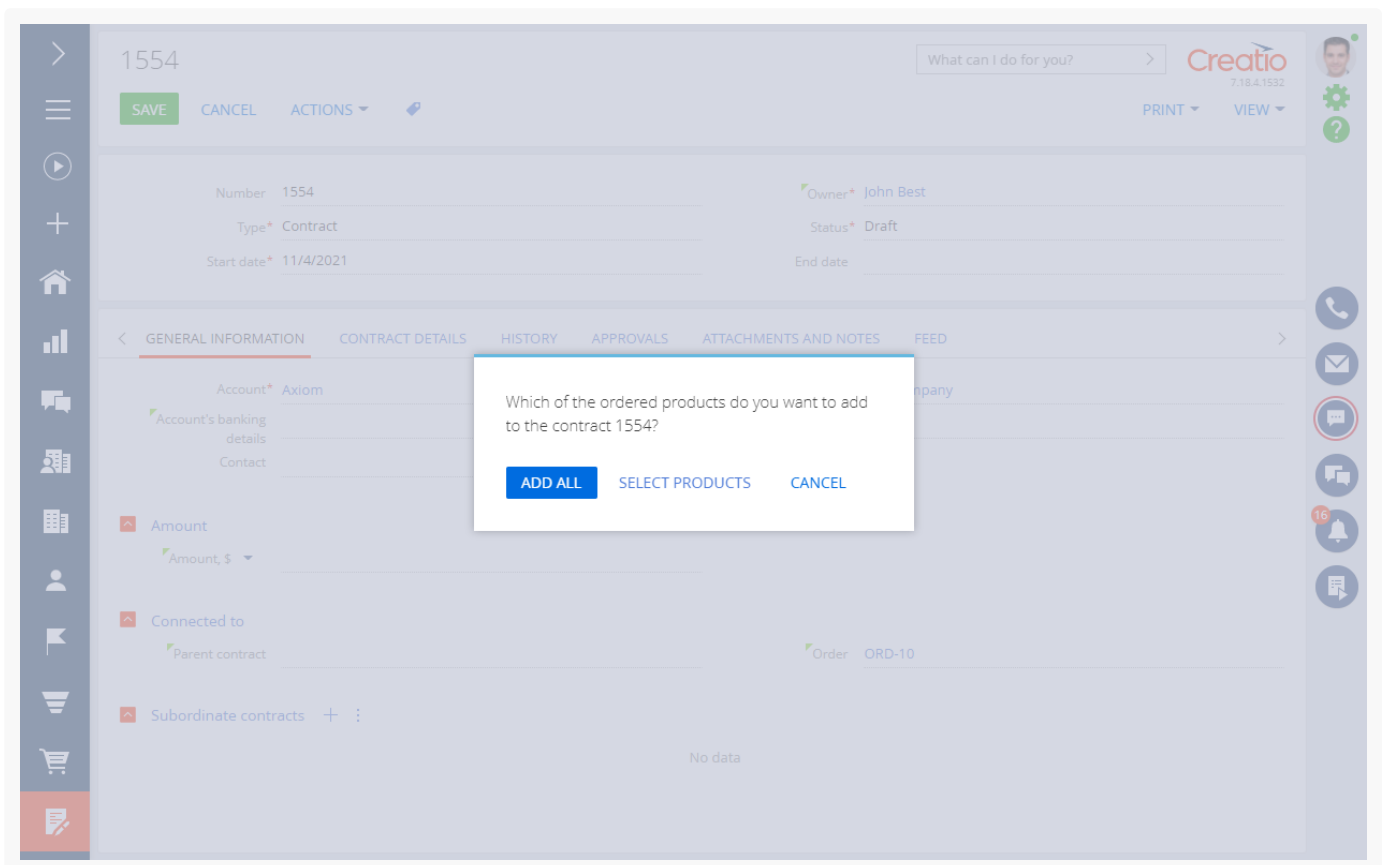
PRODUCTS: SALES ENTERPRISE

Add a Creatio contract from an order and automatically transfer ordered products to the contract, completely or selectively.

To do this:

1. Go to the [*Contracts*] section.
2. Click the [*New contract*] button.
3. Fill out the following required fields:
 - a. [*Account*]
 - b. [*Our company*]
4. Make sure the values of the following automatically populated fields are relevant:
 - a. [*Type*]
 - b. [*Status*]
 - c. [*Start date*]
5. Go to the [*Order*] field and specify the order whose products to add to the contract.
6. Click the [*Save*] button. This will open a dialog box.
7. Select the needed option in the box (Fig. 1).

Fig. 1 Create a contract based on an order



- [*All*]: the [*Contract details*] tab on the contract page will display all products connected to the order.

- [*Select*]: this will open another box. Select products to transfer to the contract.

As a result, Creatio will open the page of the new contract, populated with additional order page data:

1. The [*Account*], [*Contact*], [*Owner*] fields use the values of the corresponding order page fields.
2. The values of the [*Amount*], [*Amount, base currency*] fields are calculated as the total cost of the transferred products.
3. The [*Order*] field displays the number of the connected order.

Also, Creatio generates the contract number on the contract page automatically based on the “Contract number mask” (the “ContractCodeMask” code) system setting. The [*Start date*] field is populated using the current date, the [*Type*] field is set to “Contract,” and the [*Status*] field is set to “Draft.”

Add products to an invoice or an order


PRODUCTS: SALES COMMERCE SALES ENTERPRISE

To add products to an order or invoice quickly, such as when working with extensive product catalogs, use the catalog product selection page ([Fig. 1](#)). Navigating to the page is available in the [*Invoices*], and [*Orders*] sections.

Fig. 1 Product selection page

Code	Name	Price, \$	Quantity	Unit of measu...
577231	Asus R9280X-DC2T-3GD5	450.00		pieces
975355	Graphics Card ASUS GTX750TI-2GD5	312.05		pieces
922306	Graphics Card ASUS GTX750TI-OC-2GD5	294.69	20.000	pieces
586652	Graphics Card ASUS TURBO-GTX960-OC-2GD5	423.55		pieces
933308	Graphics Card MSI GTX 980Ti 6GD5	1,049...	2	pieces
416652	Graphics Card MSI R7 260 1GD5 OC	216.66		pieces

Let's see how to select products from an order page.


1. Go to the [*Products*] detail from the selected record in the [*Orders*] section.
2. Click + .
As a result, a product selection page with the complete list of products and services will appear. The product selection page does not display products, for which the [*Inactive*] checkbox is selected.
3. Use the search bar at the top of the page to find the needed product by name or code. Alternatively, use sorting by group in the product catalog.
4. Specify the number of products to add to the order in the [*Quantity*] field. Delete the entered value to cancel your selection.
If a product has already been added to the order, the field will feature the  icon on the right. Hover the mouse pointer to display information on the product quantity in the order. The number of order-ready products is available in the [*Warehouse*] field. The value of this field is calculated by the [*On hand*] column


on the [*Stock in warehouse*] detail on the [*Prices and availability*] tab of the product page.

5. To change the unit of measure of a product, select the required value in the [*Unit of measure*] field unless it is already in the [*Units*] detail on the product page. By default, this field shows the base unit specified on the [*Base price*] detail of the product page. After the base unit is changed, the total amount of the selected products will be recalculated.
6. Use the [*Price*] field to specify the new product price. By default, this field shows the base product price recalculated in the order currency. Changes in this field do not affect the base price specified in the [*Price*] field on the product page. The amount of the order will be calculated according to the changes made.

The summary information about the quantity of the selected products and their total cost is available in the top right corner of the page.

View and edit the cart

See the selected products in the “Cart”  view on the product selection page. Changing the quantity of a product in the list automatically adds the product to the cart. Use the cart to check the list of products you have selected, and change it as necessary.

Click  to open the “Cart” view.

The columns in the “Cart” view are mapped to the columns in the product list. This view also supports searching for products by name or code. The search result will show you the total quantity of products and the amount of the selected items. You can change the quantity and unit of measure for each product in the cart.

To remove a product from the cart, specify zero quantity, or clear the field.

Click [*Save*] to apply the changes.




As a result, the product selection page will be closed and the selected product items will be added on the [*Products*] detail of the order.

Click the [*Cancel*] button to close the page without saving your changes.

Display additional information

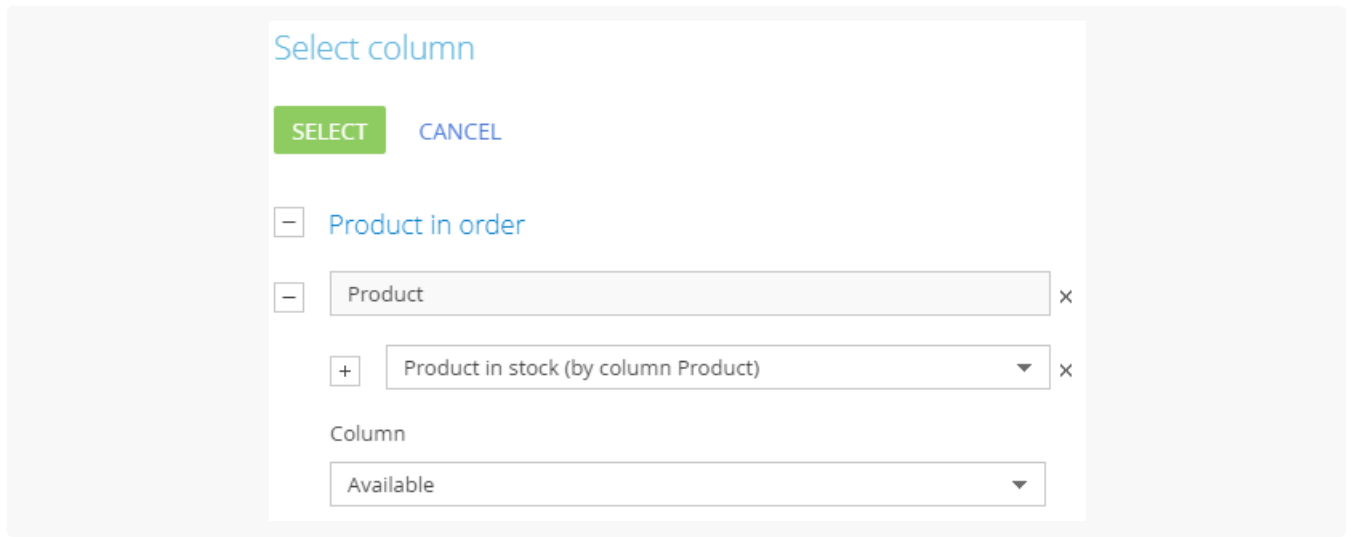
You can set up list columns in both product selection page views. For example, you can display the products available in stock.

To do this:

1. In the [*View*] menu of the product selection page, select the [*Select fields to display*] command.
2. Click the  button in the column setup area.
3. In the opened column selection window:
 - a. Click the  button next to the “Product in order” object name.
 - b. In the added field, select the “Product” reverse connection object.
 - c. Click the  button next to the “Product” object name.
 - d. In the added field, select the “Product in stock (by column Product)” reverse connection object.
 - e. In the [*Column*] field, specify the column of the “Available” connected object ([Fig. 1](#)).

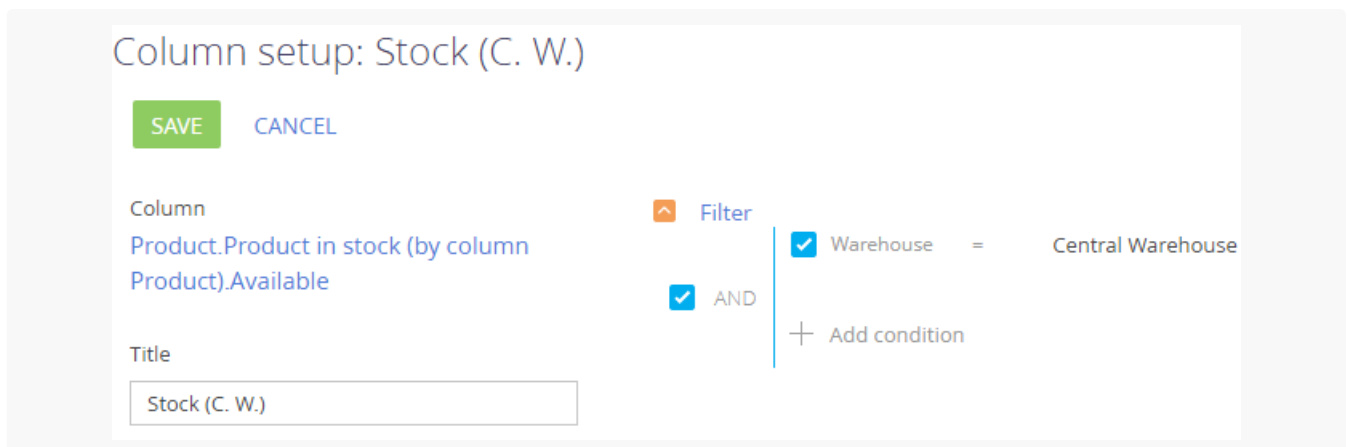
- f. Click the [Select] button.

Fig. 1 Set up reverse connection columns for the “Product in order” object



4. On the opened page, specify the display parameters for the selected column:
 - a. Enter the column title, for example, “Stock (C. W.)”.
 - b. Specify the filter for data aggregating. For example, to display the product stock in a specified warehouse, set the filter by the corresponding warehouse ([Fig. 2](#)).

Fig. 2 The “Stock (C. W.)” column setup



5. Click the [Save] button on the column setup page.
6. Save the list setup.

As a result, the list on the product selection page will display the product stock in the warehouse ([Fig. 3](#)).

Fig. 3 The “Stock (C.W.)” column display on the product selection page

Code	Name	Price, r...	Quantity	Unit of measure	Stock (C. W.)
524584	Intel Core i5-4670K	8,70...		pieces ▼	55.00
937289	Intel Core i7-4930K	21,9...		pieces ▼	10.00
456722	Microsoft Office 2010 Russian	3,00...		pieces ▼	20.00
89138765	Motherboard UT165LZ-32P1 (sample)	900...		pieces ▼	40.00
367898	Windows 7 Professional Russian	4,50...		pieces ▼	15.00
122268	Antivirus Kaspersky Internet Security 2010	1,50...		pieces ▼	25.00
975355	Video card ASUS GTX750TI-2GD5	18,0...		pieces ▼	7.00

Orders FAQ

PRODUCTS: [SALES ENTERPRISE](#) [SALES COMMERCE](#)

Why are price calculations incorrect during product selection?

The product price in order, and invoices issued based on that order, may display incorrectly if the [*Products*] detail page has incorrect or no values in the following fields: [*Unit of measure*], [*Tax*], [*Currency*], [*Price*]. Check if all the mentioned fields are filled in correctly for all records on the [*Products*] detail on the order page. To ensure that the price is updated in the order, select the source price list on the [*Products*] detail once again and save the record.

How is tax amount calculated when a product is added?

By default, the tax amount is included in the product price that you enter in Creatio. To change this logic, disable the [*Default value*] checkbox in the [*Price includes taxes*] system setting.