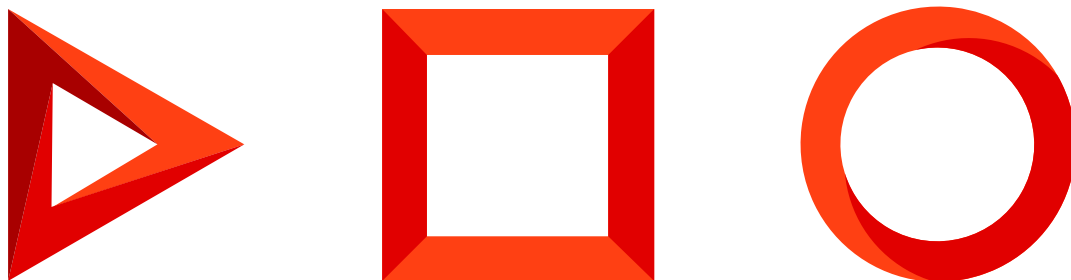


Products and prices

Version 7.17



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Add products

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

Add products

The [Products] section contains information about products and services offered by your company. Use this section to create a product catalog, specify product prices and stock, as well as store detailed description and features for each product.

Add a product record

1. Open the [Products] section and click [New product].
2. On the [General information] tab, populate the following information about the product:

Photo	Image of the product. Click to add a new image by using the standard file selection window. We recommend uploading a square image (aspect ratio: 1:1). Click to remove the image.
Name	Name of the product or service.
Code	Identifier of the product. The product code is often used, for example, if two products have the same name.
Link	Link to a web resource related to the product, for example, the product page on the manufacturer's website or in the online shop catalog.
Unit of measure	Product measuring unit. The field is only available for Sales Creatio, team edition.
Owner	The employee who is responsible for this product.
Inactive	The checkbox indicates that the product cannot be offered to customers. For example, the product has been withdrawn from sale or is no longer delivered. Inactive products are not displayed on the product selection page.

3. Specify product segmentation parameters (available for Creatio Sales, commerce edition; Creatio Sales,

enterprise edition; Creatio Marketing):

Category	Product category, for example, “Hardware” or “Software”.
Type	Type of product. The list of types depends on the selected category. For example, products of the “Hardware” category can be of the following types: “Graphics cards”, “Motherboards”, etc.
Brand	Product brand.

4. Populate the base price value according to which the product prices will be specified in the price lists.

Price	Price of the good or service. The amount can be specified in any currency. For more on the currency conversion, see the “Working with currencies” article.
Tax	The tax rate that will be used by default with this product, for example, “VAT” (available for Creatio Sales editions).
Unit of measure	The base unit of measure of the product. When you save the record, the selected unit of measure is added to the [Units] detail with the [Base] checkbox selected.

5. Click [Save].

Specify product availability

Note

The feature is only available for Creatio Sales, enterprise edition and Creatio Sales, commerce edition.

Use the [Availability] detail on the product page to enter information about the number of products available at the warehouses. If you store products in several warehouses, the number of products in stock, reserved products, and products on hand will display for each product.

You can populate the detail manually. If you set up an integration with a third-party system, the information from your external account appears in the detail automatically. To add a record on the detail, click and populate the page that opens:

Warehouse	The warehouse where the product is stored.
Balance	The total quantity of the product stored in the warehouse.

Reserved	Reserved quantity of products.
Available	Product quantity that can be sold. The field is non-editable. Its value is calculated as the subtraction of the [Reserved] and [In stock] fields.

Specify product features

Note

The feature is only available for Creatio Sales, enterprise edition; Creatio Sales, commerce edition and Creatio Marketing.

Use the [Features] tab of the product page to customize the product features. For example, computer CPU speed or supported memory. You can search for a product by the product feature in the product catalog.

1. In the [Products] section, open the needed product.
2. Go to the [Features] tab and click . A new product feature page opens.
3. Populate the [Feature] field:
 - a. To add an existing feature, type in the feature name or use the lookup window to select a feature.
 - b. To add a new feature, open the lookup window and click [New], then populate the feature name and select its value (e.g., for example, "Drop-down list" or "Decimal"). After saving a new feature the [Value type] field becomes non-editable.
4. Populate the value of the feature. If you select the "Drop-down list" data type, the [Values] detail appears on the page. You can add the needed list of feature values to it. The value displays on the page once you select a feature. The field type depends on the type of the selected feature value. For example, you can enter a digit for the decimal feature, and select or clear the checkbox for the boolean feature.
5. Click [Save] on the feature page to save the product feature.

You can add the following types of product features:

- "Decimal"; "Integer" – numeric type. For example, the "CPU Speed, GHz" or "Number of cores" features.
- "Drop-down list" – data type for which you can select a value from the list. For example, the "Computer case color" feature for which the following list of values is specified: "Black" and "Silver."
- "Boolean" – data type for which you can specify the "Yes" or "No" value. For example, "DVD".
- "String" – data type for which you can manually enter a text value. For example, the "Additional information" detail.

Once you save the feature, it will be available on the [Features] detail of the product page.

Manage prices

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

Note. The feature is only available for Creatio Sales, enterprise edition and Creatio Sales, commerce edition.

Use price lists to manage prices for different customer categories. You can include a product in multiple price lists. When issuing orders, use either the universal “base” price list or a price list that is specific for the customer or affiliate.


Personal price lists are specified in the customer’s account profile.

Note. For more information on using personal price lists in affiliate orders, see the “[Special conditions of partner cooperation](#)” article.

When issuing an order, Creatio pulls the price from the customer’s personal price list, if the corresponding price list is available. If the product price is not found in the customer’s personal price lists, Creatio pulls the price from the base price list (specified in the “Base price list” system, setting). If the base price list is not set, Creatio pulls the product price from the product page.

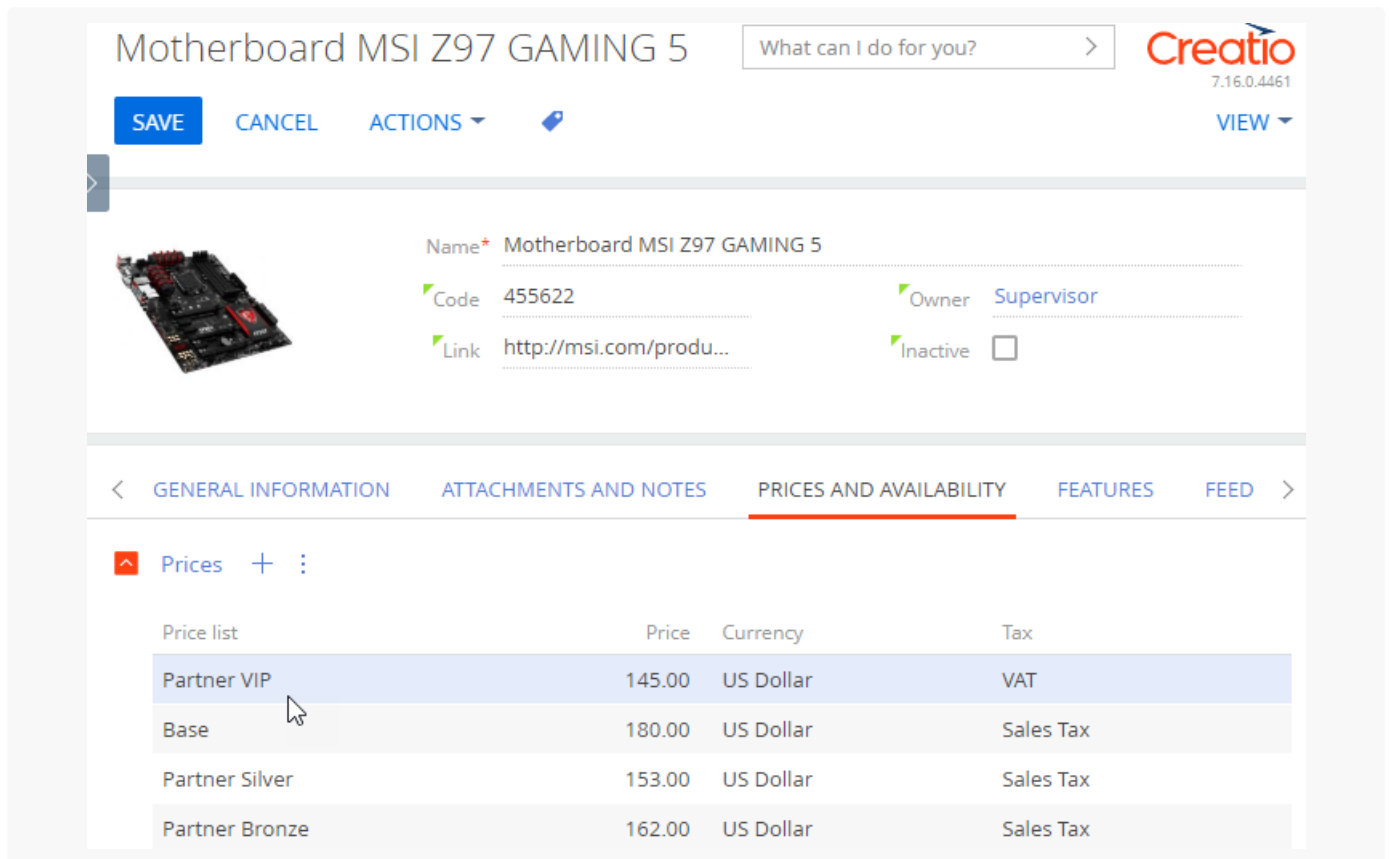
Create a personal price list

Use the [*Price lists*] lookup to manage your price lists. The prices for different price lists are specified in the [*Prices*] detail of the [*Prices and availability*] tab on the product page.


1. Click  in the main Creatio application. The System Designer will open.
2. Click the [*Lookups*] link in the [*System setup*] block.
3. Open the [*Price lists*] lookup → click [*Add*]. Enter the price list name, e.g., “VIP Affiliates.”
4. Open the [*Products*] section. Open a product page.
5. Go to the [*Prices and availability*] tab → [*Prices*] → +. The [*Product price*] page opens.
6. Select the price list in the [*Price list*] field.
7. Specify the product price for the selected price list in the [*Price*] field.
8. Click [*Save*].


As a result, the name of the new price list will be added to the [*Prices*] detail ([Fig. 1](#)).

Fig. 1 Price list displayed on a product page



Motherboard MSI Z97 GAMING 5 What can I do for you? > **Creatio** 7.16.0.4461 VIEW ▾


SAVE **CANCEL** **ACTIONS ▾** 

 Name* Motherboard MSI Z97 GAMING 5

Code 455622 Owner Supervisor

Link <http://msi.com/produ...> Inactive

< **GENERAL INFORMATION** **ATTACHMENTS AND NOTES** **PRICES AND AVAILABILITY** **FEATURES** **FEED** >

 **Prices** + ⋮

Price list	Price	Currency	Tax
Partner VIP	145.00	US Dollar	VAT
Base	180.00	US Dollar	Sales Tax
Partner Silver	153.00	US Dollar	Sales Tax
Partner Bronze	162.00	US Dollar	Sales Tax

Add the [Price list] field to the account page

By default, the [*Price list*] field is hidden on the account page. You can add this field via the Section Wizard, for example, to the record profile ([Fig. 1](#)).

See the “[Set up page fields](#)” article for more about adding fields to pages, based on existing section columns.

Fig. 1 The [*Price list*] field displayed on the account page

★ **Feature IT** 95% [Enrich data](#)

Name*
Feature IT

Type
Partner

Owner
Caleb Jones

Web
www.feature-it.com

Primary phone
+1 212 735 2537

Category

Industry
IT companies

Price list
Partner VIP

Select a personal price list on the account page

1. Open the [*Accounts*] section.
2. Select an account and open the account page.
3. Populate the [*Price list*] field by selecting the new personal price list and click [*Save*].

Note. By default, the [*Price list*] field is hidden on the account page. Use the Section Wizard to add the field to the record page of the [*Accounts*] section.

As a result, every time the account orders a product from the personal price list, Creatio will pull the product price from that price list.

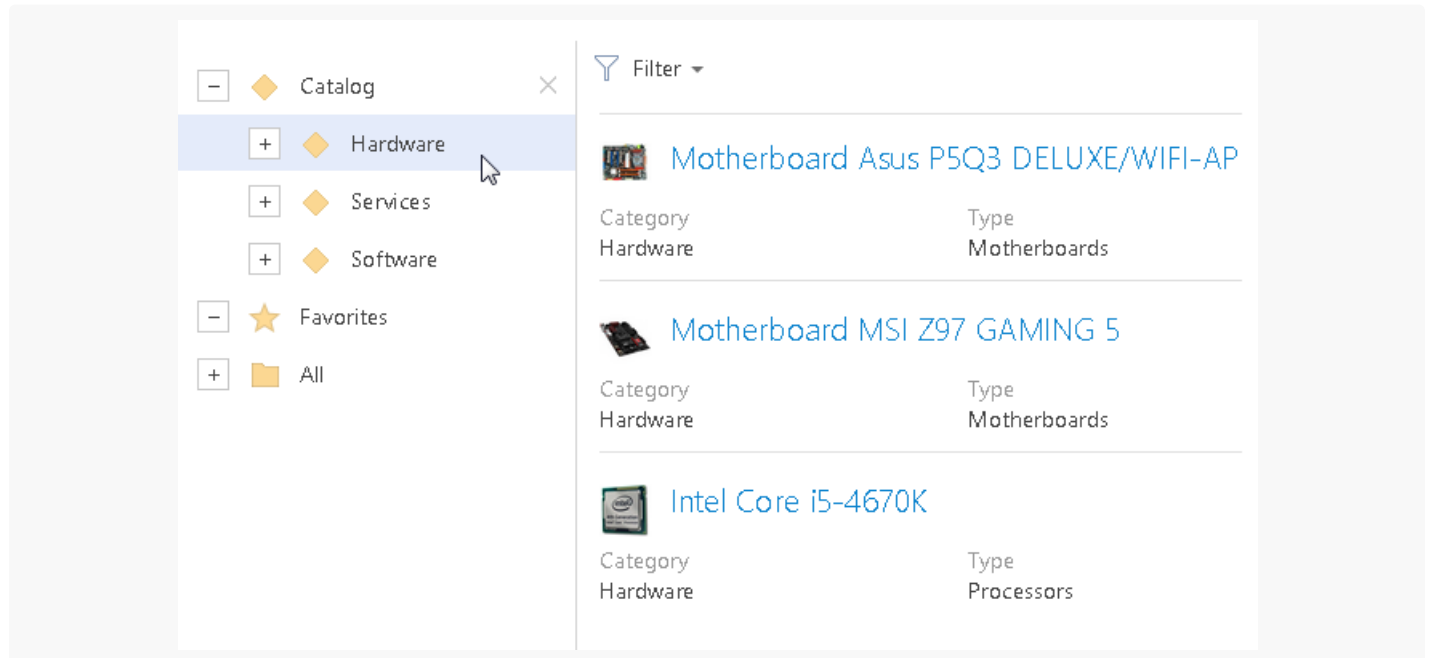
Set up a product catalog

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

The product catalog is a separate [folder tree](#) in the [*Products*] section, as well as [*Invoices*] and [*Orders*]

sections, that can be identified with the  icon (Fig. 3).

Fig. 1 The product catalog

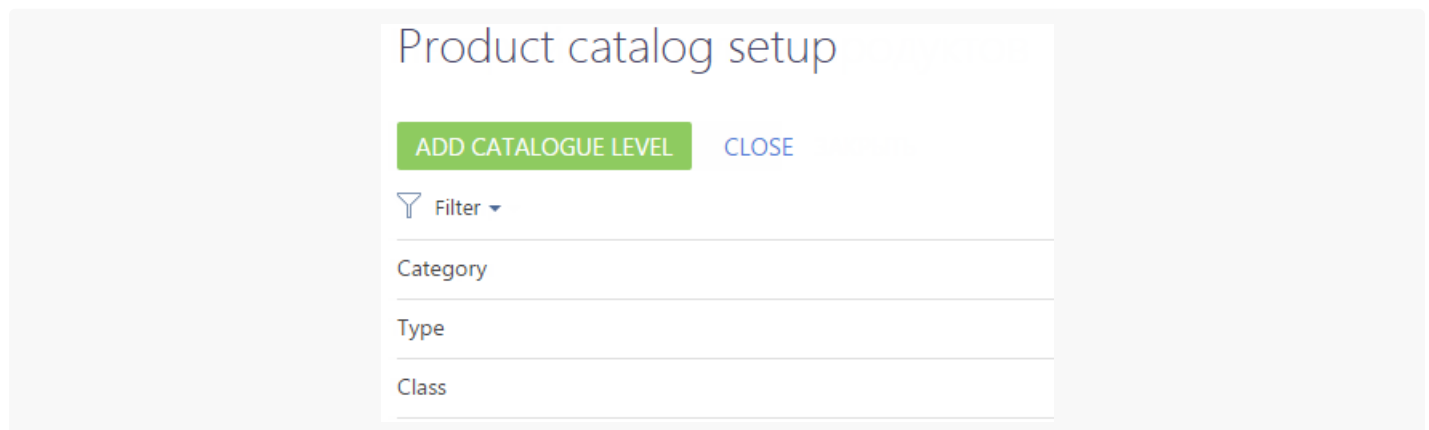


You can create the catalog structure based on categories, types, filter conditions, and other grouping criteria that you set for products. This enables you to classify and quickly search for the needed products.

The product catalog is available in the folder tree of the [*Products*] section. To **open the product catalog**, select [*Filters/folders*] → [*Show folders*] .:

You can **set up catalog levels** by certain grouping criteria, for example, by category and type. To do this, use the [*Set up product catalog*] option in the actions menu of the [*Products*] section (Fig. 2).

Fig. 2 The setup page for the product catalog



To add a new catalog level:

1. Open the [*Products*] section.
2. In the [*Actions*] menu, select [*Set up product catalog*].
3. On the product setup catalog page, click [*New*].
4. On the page that opens, specify:

- a. Name – catalog level name that displays in the list of the catalog setup page.
- b. Product field – product page field, which is used for product categorization on this level of the catalog. For example, select the Category field so that the catalog folders on this level correspond to the product categories

Note. The catalog structure only displays the levels (folders) that have available records in Creatio. For example, if the “Hardware” category contains no products, then the “Hardware” level will not be displayed in the catalog structure.

Search products in the catalog

PRODUCTS: SALES ENTERPRISE SALES COMMERCE

For each product type, you can set up additional parameters that will help you search by product field or feature. You can also do it while [selecting products](#) in documents, invoices, or orders.

Set up search parameters

To set up the list of search parameters for the catalog items based on the product type, as well as for their nested items:

1. Open the [*Products*] section.
2. In the [*Actions*] menu, click the [*Set up product types and filters*] action. The list of current product types opens.
3. Select a product type and click [*Open*]. The product type page opens.
4. On the [*Filters*] detail, set up the filters for the current product type, click + to add a filter for products of that type.:
 - a. Select [**Filter by product field**] to add a filter by one of the product fields. When you select this command, the list of product page fields opens. For example, to display a product catalog of a specific trademark for this product type, select the [*Trademark*] column.
 - b. Select [**Filter by feature**] to add a filter by a product feature. When you select this command, the list of product features opens. For example, you can add filtering by CPU frequency for the laptop.
5. Click [*Close*].

As a result, additional filters will become available in the product catalog for this specific type of product.

Search product catalog using additional filters

After you set up the product type search parameters, you can search for products by the needed value. To do so:

1. Open the [*Products*] section.
2. Select [*Filters/folders*] → [*Show folders*].


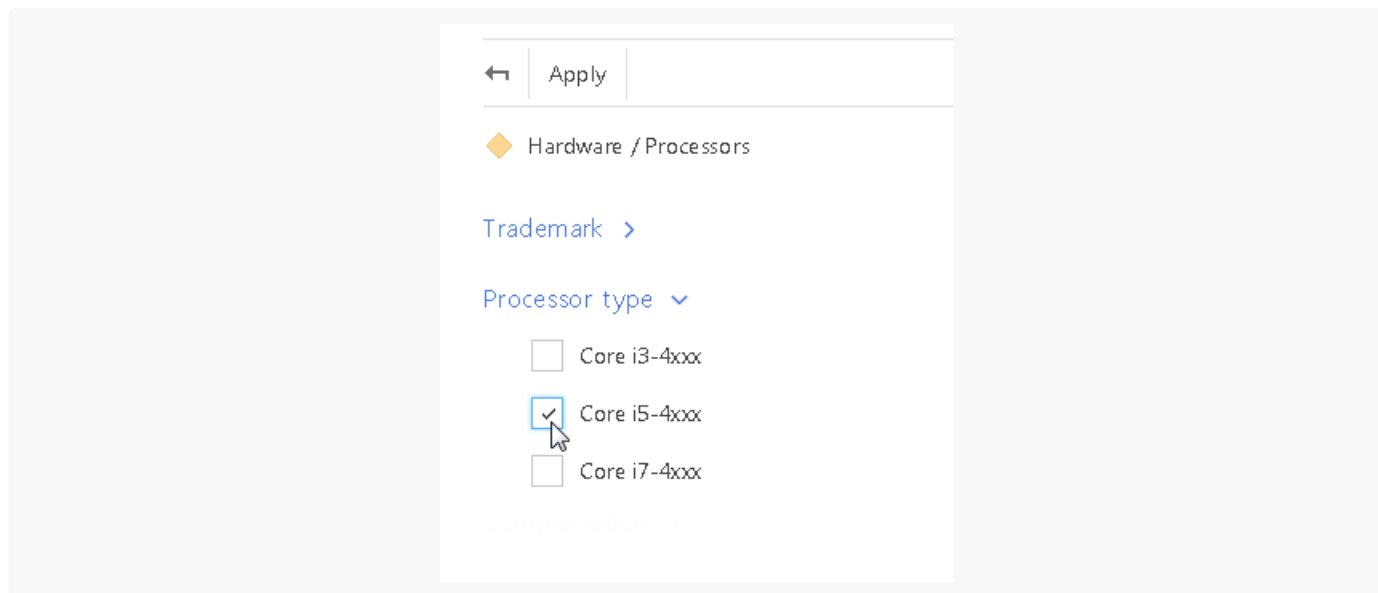
- In the folder tree on the left, open [*Catalog*] → select the needed catalog item.
- Click  to the right of the item name. The search area will open ([Fig. 1](#)).

Fig. 1 Catalog search extended mode



- Select the checkbox in front of the needed value (for the lookup field) or enter the text (for the field of the “String” type).
- Click [*Apply*].

As a result, the products corresponding to the specified search criteria will display on the side of the page.