

# Table of Content

<b>1. Introduction</b>	<b>2</b>
<b>2. Categories</b>	<b>3</b>
<b>3. Creation of Products</b>	<b>3</b>
3.1. Price tab	5
3.2. Substitute tab	7
3.3. Product Image	8
3.4. UOM Conversion Tab	9
<b>4. Units of Measure (UOM)</b>	<b>10</b>
<b>5. Price Lists</b>	<b>12</b>
5.1. Flexible Tax Models On Products	14

Version 1.0

**Publication date** 06/23/2023

**Created by** : SmartJSP    **Reviewed by** : Andrés Rozo

**Authorized by** Pedro Rozo

**Document:** Idempiere First Steps (core)

**All rights reserved.**

This manual may be reproduced or transmitted by any electronic or mechanical means, including photocopying, magnetic recording, or any information storage media and reproduction system, keeping SmartJSP credits on it. (GNU licensed)

**Edition Authorized** by <http://www.smartjsp.com>

**Made in Colombia**

# 1. Introduction

Products is a term used in Idempiere for something that you buy or sell and you control their stock (inventory) These products include products sold to customers, products used in the manufacturing of products that are purchased from vendors. When you buy or sell a Product, it will require a price as one of the Product's attributes and smoking of storage in locations and warehouses.

Services on the other hand, share all the same information that products, but they do not need stock (inventory). Then in idempiere we manage product and services with the same windows and documents just having in mind that difference, then any time we talk about products the same apply for services.

## 2. Categories

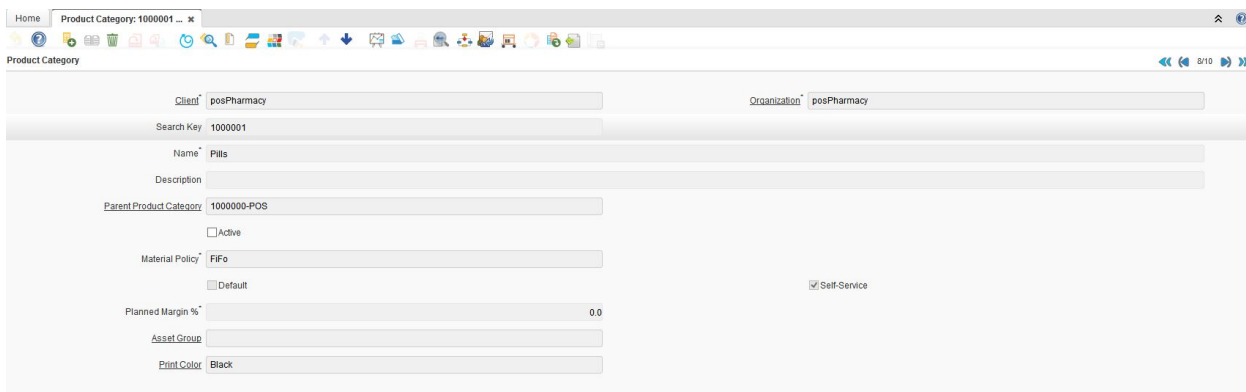
Product definition

### Material Management - Material Management Rules – Product Category

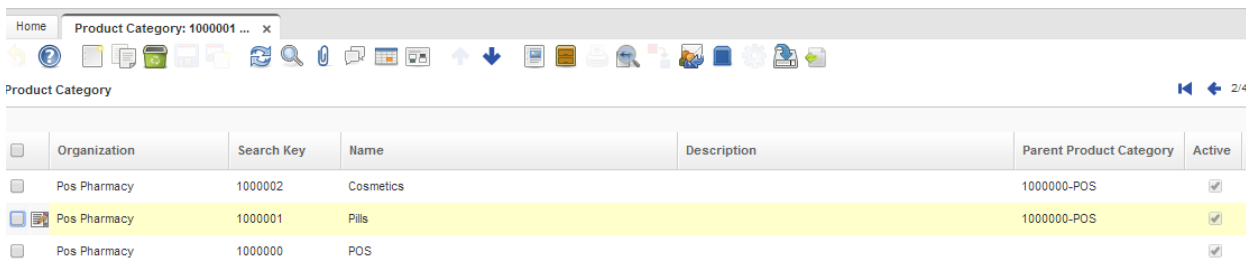
**PRODUCT CATEGORY:** A POS Product Category refers to a group of products/services that share a similar characteristic or parameter.

You must specify the organization when creating categories.

Contains the Default, Self-Service, Planned Margin %, Asset Group and Print Color fields.



Product Categories can belong to a parent category which is a group with a common characteristic, that will be associated into this parent category. We can create hierarchies of categories with a lot of flexibility in idempiere .

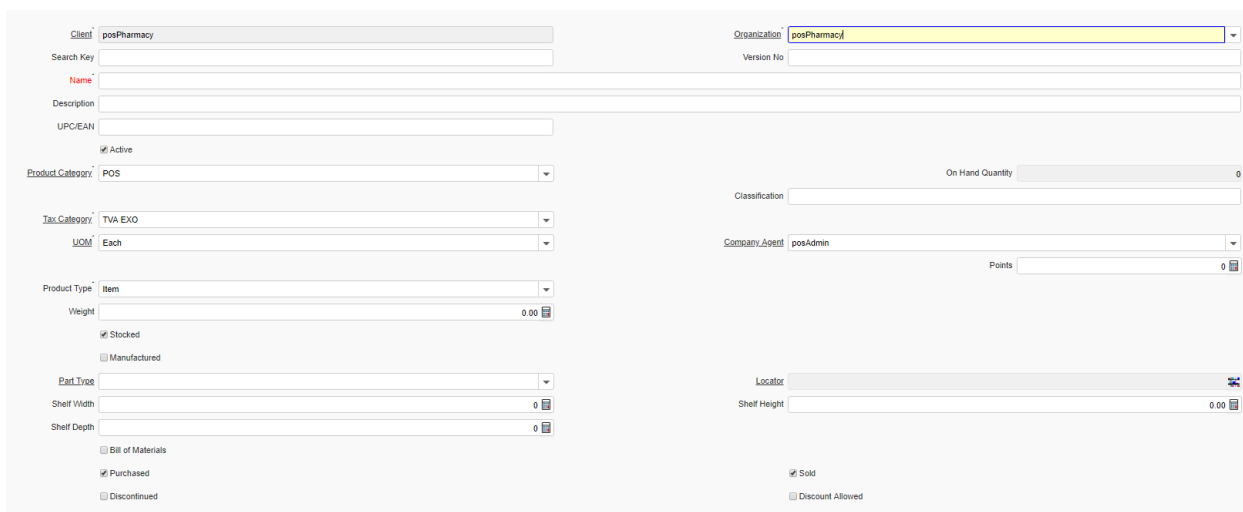


<input type="checkbox"/>	Organization	Search Key	Name	Description	Parent Product Category	Active
<input type="checkbox"/>	Pos Pharmacy	1000002	Cosmetics		1000000-POS	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Pos Pharmacy	1000001	Pills		1000000-POS	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Pos Pharmacy	1000000	POS		1000000-POS	<input checked="" type="checkbox"/>

### 3. Creation of Products

Follow the route on the menu:

**Material Management → Material Management Rules → Product**



A product refers to all the items that will be commercialized during the sales exercise, this products requires a physical space where to be organized or stocked and essential attributes like:

Search Key (Product Code)	Price List (Sales and Purchase)
Name	Locator
Description	Attribute set (Lot, Expiration date)
EAN (Barcode)	Points


It is optional to indicate how many points the customer who purchases the product being created adds up.

Name*	Producto_prueba	UPC/EAN	100001
Product Category*	POS	On Hand Quantity	0
Locator	10-A-1	SKU	
Classification		Points	100
Therapeutic Action		UQM*	Each
Tax Category*	TVA EXO		
Image URL			

It is important to keep the new record that is being generated, in order to assign a purchase and sale price. Once saved, new fields are enabled to continue adding information to the product being created.


Note: It can also be configured if the product has therapeutic action.

### 3.1. Price tab


Substitute	Replenish	<b>Price</b>	Transactions	Located at
 0 Records				
<input type="checkbox"/>	<b>Organization</b>	<b>Product</b>	<b>Price List Version</b>	
No Records found				


For the price, you can set the sale price and the purchase price. There are three values to configure: List price, standard price and limit price. Each price setting must be properly saved. In this way, the product will be available, although for the moment its quantity is zero. It will be necessary to add an amount in the physical inventory document.


Product PRU\_Producto\_prueba

**Price List Version** \*  

- Purchase Prices
- Sales price list

List Price \*  

Standard Price \*  



Limit Price \*  

Special case: (Smartretail) you can see specify: the therapeutic action of this product just by passing the mouse over

▼ Withholding Information

Group1

Group2

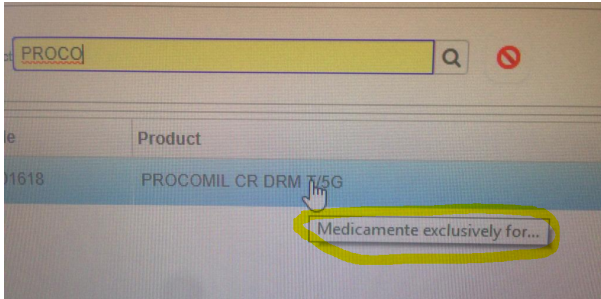
Discontinued by    

Download URL

Is Refilled

Intern Quantity

**Therapeutic Action**



### On Hand Quantity: To show current stock available


Product 1/2129

Client: pharmacyDuCarrefour	Organization: Marcory
Search Key: 0	Version No:
Name: KOJEE HERBAL COFFEE	
Description: LABOREX	
UPC/EAN: 0	
<input checked="" type="checkbox"/> Active	
Product Category: Medicament Public	On Hand Quantity: 1
Tax Category: TVA EXO	Classification:

### 3.2. Substitute tab

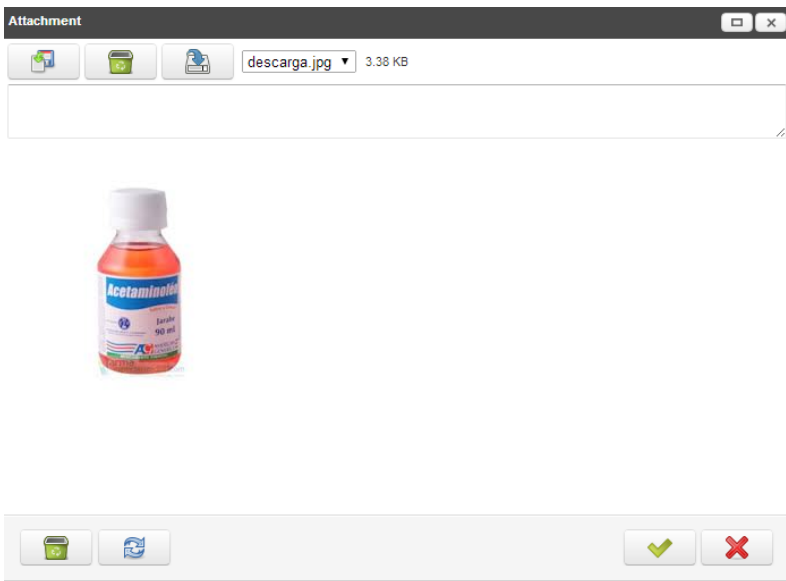
In case a product exists with a similar therapeutic action. Products Configured here the system will show them to the pharmacist when there is no inventory.

Substitute ▼

Client *	posPharmacy
Product *	1000000_Acetaminofen
Name *	
Description	
<input checked="" type="checkbox"/> Active	
Substitute *	

### 3.3. Product Image

An image of the product can be inserted using the attachment feature located on the main Product Window:



Note: You *must*:

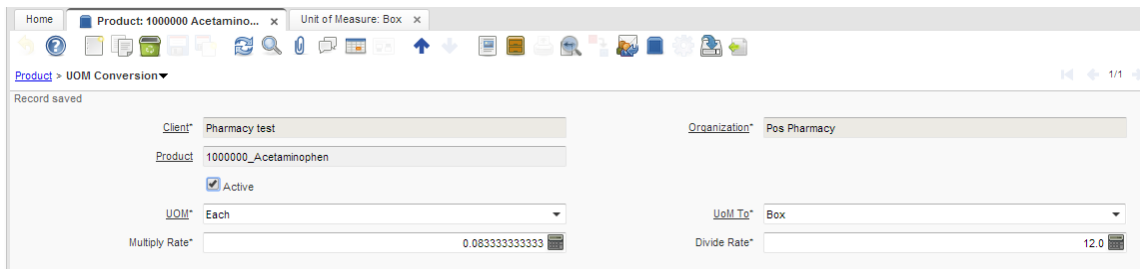
- specify the organization during the creation of your products
- specify the unique warehouse locator during the creation of your products



- specify at least (1) sale price per sales list price during the creation of your products

### 3.4. UOM Conversion Tab

The UOM Conversion tab can define the units of measure that the product can operate in. These can be customized to specific units or combined with standard ones.



#### Tips to double check:

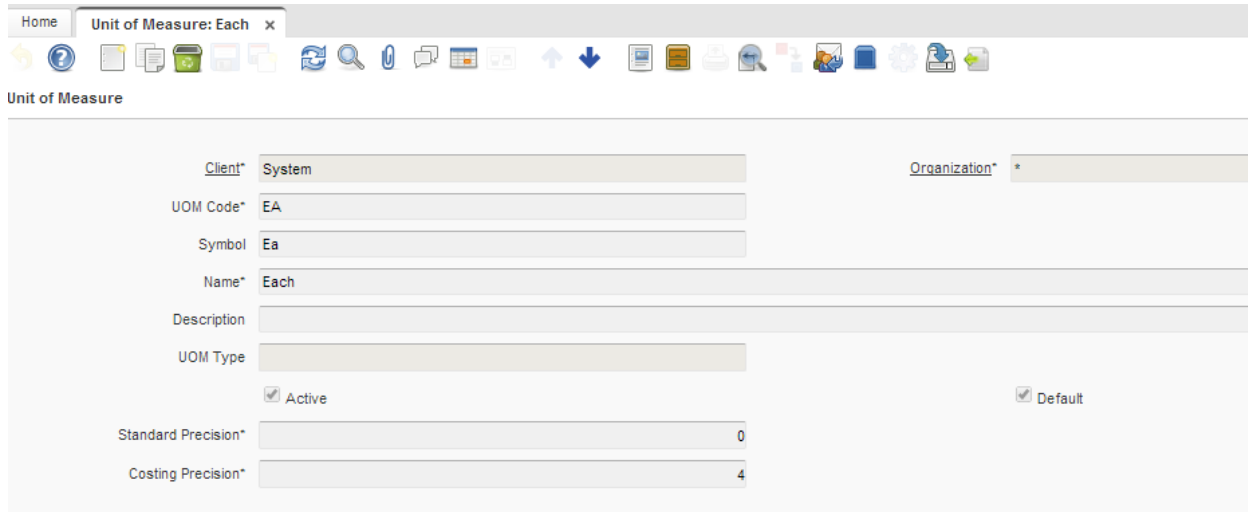
- *The products must have a specific organization*
- *The base unit of measure used is the smallest for example: Each / Pill*
- *Tax category defined in the product will be the tax rate*
- *Group 2 field: It sets the printer route for the Tickets example: cashier or warehouse etc.. if you want to route your product to more than 1 printer, you can do it separating them by : cashier, warehouse, warehouse2*
- *After completing the information on the products tab proceed to create the unit of measure conversions.*

## 4. Units of Measure (UOM)

Material Management - Material Management Rules – Unit of measure

Idempire includes some units of measure out-of-the-box.

You may create different units of measure in which sales and procurement are conducted.



Home Unit of Measure: Each x

Unit of Measure

Client\* System Organization\* \*

UOM Code\* EA

Symbol Ea

Name\* Each

Description

UOM Type

Active  Default

Standard Precision\* 0

Costing Precision\* 4

Quick setup just requires “each unit”

If required you can create additional UOM depending on your business type. For example, pill.

*\*Remember: Precision is the number of digits in a number. Scale is the number of digits to the right of the decimal point in a number.*

**Unit of Measure**

Inserted

Client: posPharmacy Organization: posPharmacy

UOM Code: PL

Symbol:

Name: Pill

Description:

UOM Type: [v]

Active  Default

Standard Precision: 2

Costing Precision: 0

And the conversion for this unit of measure:

[Unit of Measure](#) > Conversion

Inserted

Client: posPharmacy

UOM: Pill

UoM To: [v]

Product: [v]

Active

Multiply Rate: 0.0

Divide Rate: 0.0

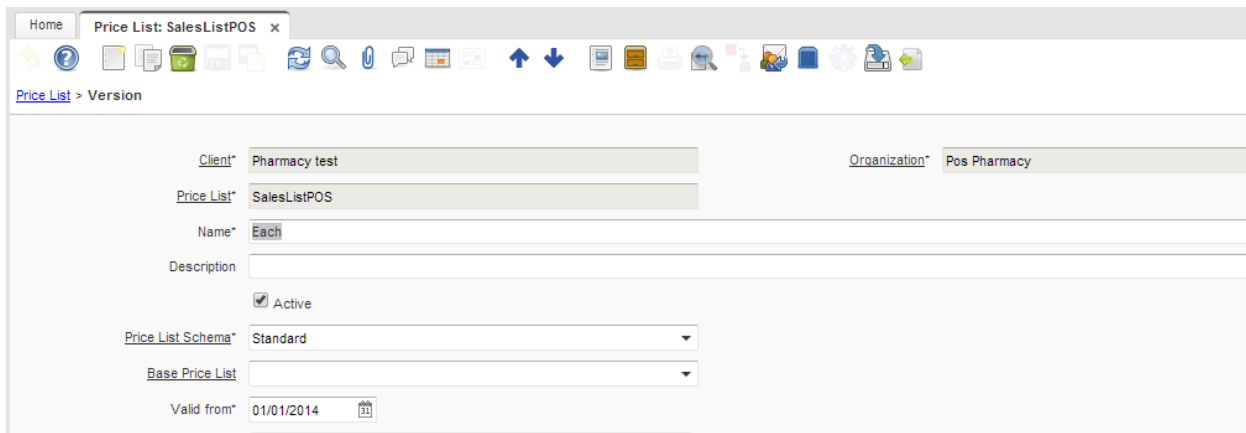
In each of the unit of measurement records, there is a Conversion tab, in which you can define conversion rates between a product's unit of measurement. For example, if you have both the Meter and Yard unit of measurement, 1 yard is equal to 0.9144 meters. You can define this information in the conversion tab.

Conversion should be recorded based on products. With this feature, you can define different conversion rates between yards and meters for different products.

## 5. Price Lists

### Material Management - Material Management Rules – Price List

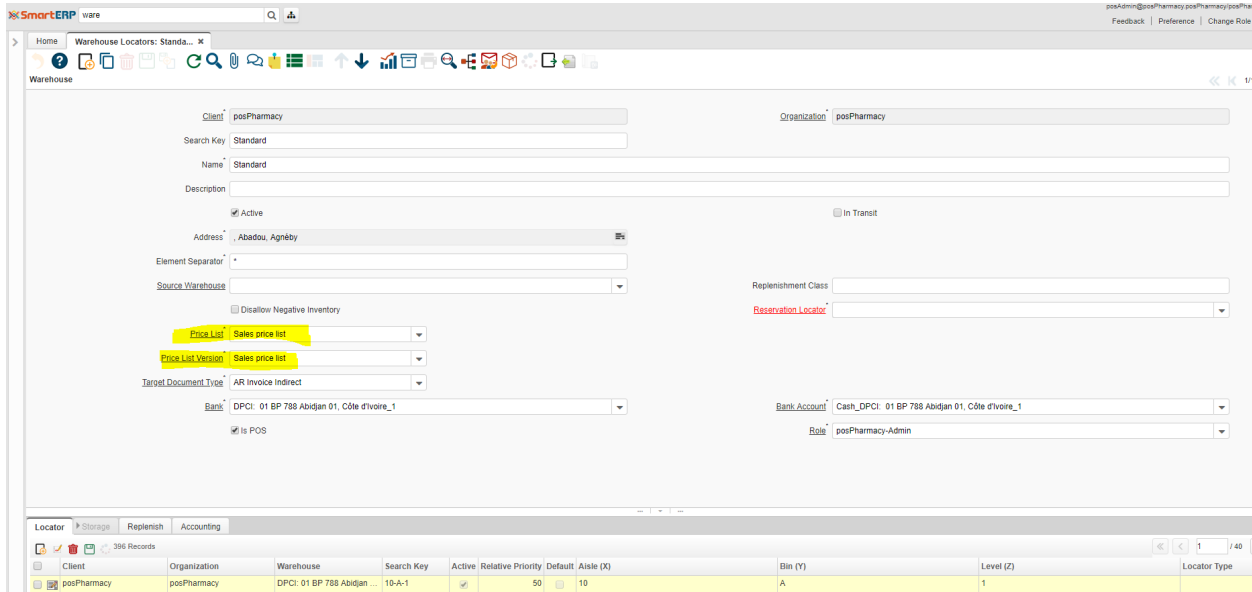
- Purchase Prices: PurchaseListPOS
  - Version of price list: EachPurchase
- Sales Prices: SalesListPOS (default)



The screenshot shows a web application interface for configuring a Price List Version. The breadcrumb navigation is "Price List > Version". The form contains the following fields:

- Client\***: Pharmacy test
- Organization\***: Pos Pharmacy
- Price List\***: SalesListPOS
- Name\***: Each
- Description**: (empty)
- Active**:
- Price List Schema\***: Standard (dropdown menu)
- Base Price List**: (dropdown menu)
- Valid from\***: 01/01/2014 (calendar icon)

- Warehouse Price list & Version: You should define a price list & version to each warehouse.
- Customer Price list & Version: Before using the warehouse price list versions (default behavior),



SmartERP ware

Warehouse Locators: Stand... X

Warehouse

Client: posPharmacy Organization: posPharmacy

Search Key: Standard

Name: Standard

Description:

Active  In Transit

Address: Abadou, Agnèby

Element Separator: \*

Source Warehouse:

Disallow Negative Inventory

Price List: Sales price list

Price List Version: Sales price list

Target Document Type: AR Invoice Indirect

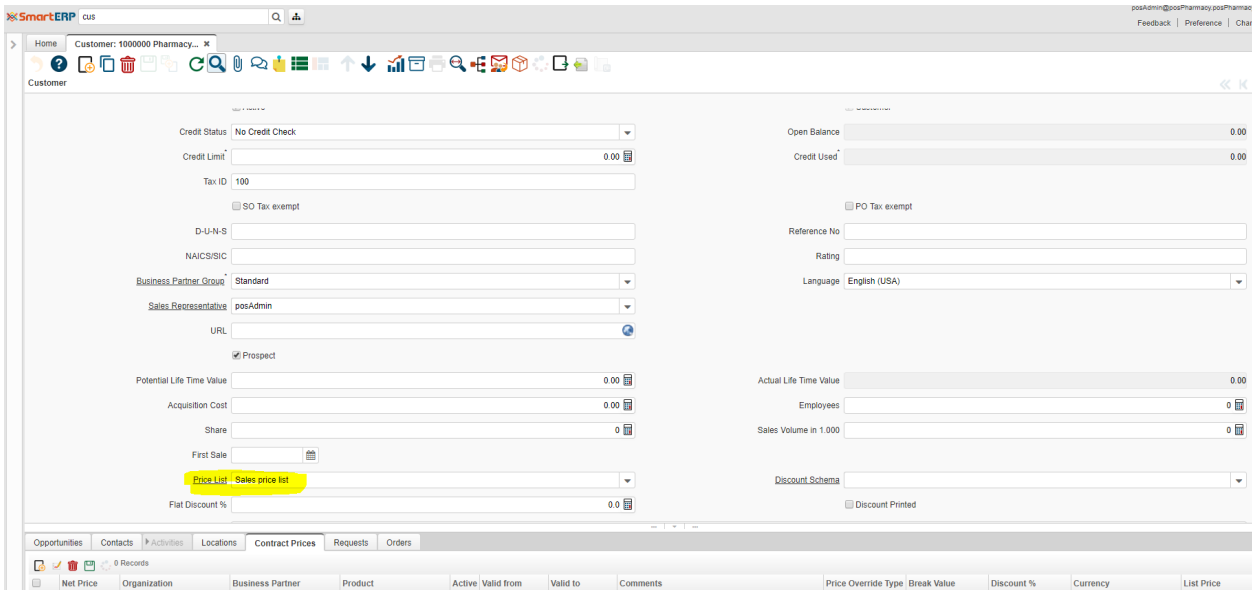
Bank: DPCI: 01 BP 788 Abidjan 01, Côte d'Ivoire\_1

Bank Account: Cash\_DPCI: 01 BP 788 Abidjan 01, Côte d'Ivoire\_1

Role: posPharmacy-Admin

Locator

Client	Organization	Warehouse	Search Key	Active	Relative Priority	Default	Aisle (X)	Bin (Y)	Level (Z)	Locator Type
posPharmacy	posPharmacy	DPCI: 01 BP 788 Abidjan ...	10-A-1	<input checked="" type="checkbox"/>	50	<input type="checkbox"/>	10	A	1	



SmartERP cus

Customer: 1000000 Pharmacy... X

Customer

Credit Status: No Credit Check

Credit Limit: 0.00

Tax ID: 100

SO Tax exempt

D-U-N-S:

NAICS/SIC:

Business Partner Group: Standard

Sales Representative: posAdmin

URL:

Prospect

Potential Life Time Value: 0.00

Acquisition Cost: 0.00

Share: 0

First Sale:

Price List: Sales price list

Flat Discount %: 0.0

Open Balance: 0.00

Credit Used: 0.00

PO Tax exempt

Reference No:

Rating:

Language: English (USA)

Actual Life Time Value: 0.00

Employees: 0

Sales Volume in 1,000: 0

Discount Schema:

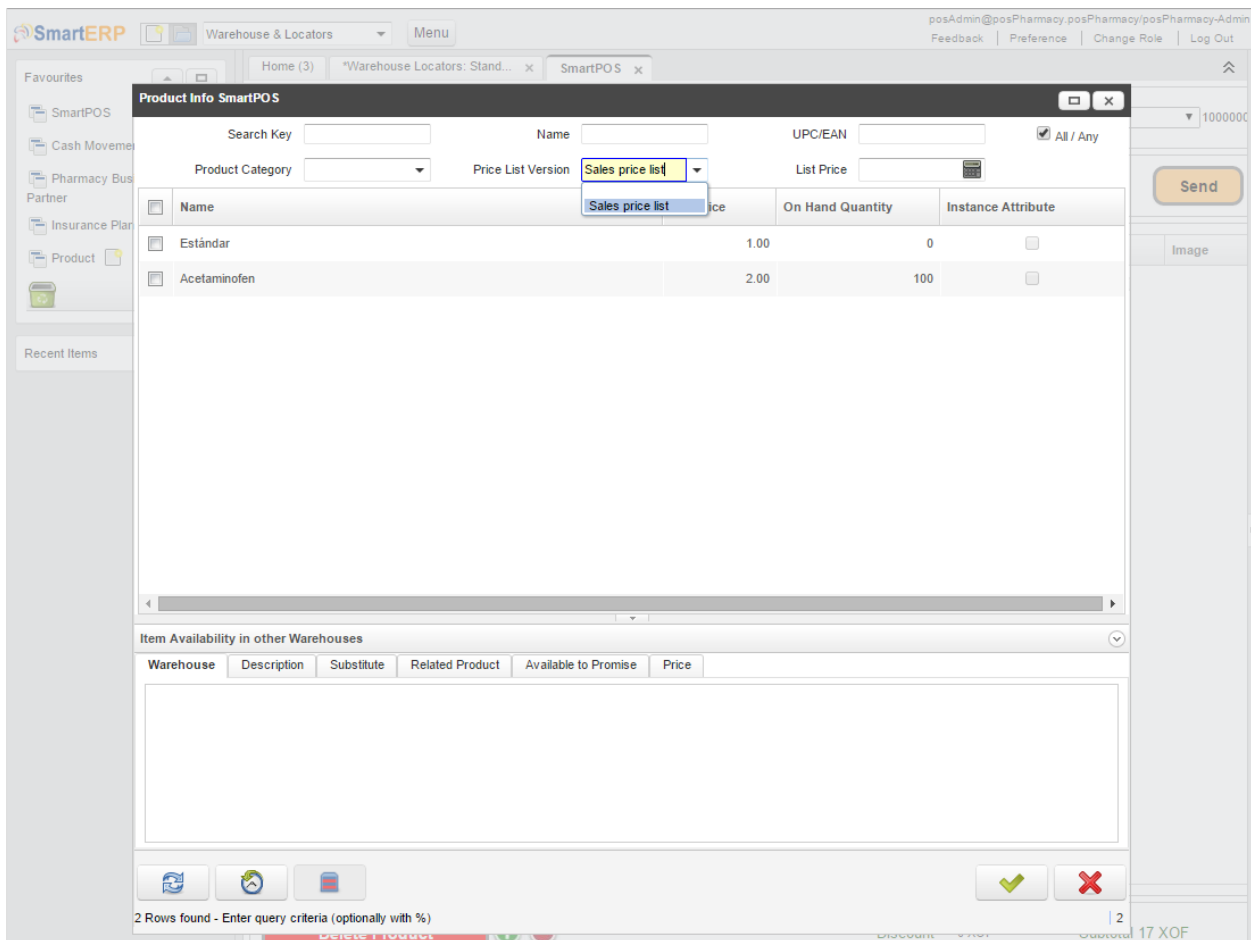
Discount Printed

Opportunities

Net Price	Organization	Business Partner	Product	Active	Valid from	Valid to	Comments	Price Override Type	Break Value	Discount %	Currency	List Price

The fields (Price List and Price List Version) are mandatory.

When looking for a product in the search box of Idempiere it will only display products that are in the list of values previously assigned to the Business Partner or warehouse.

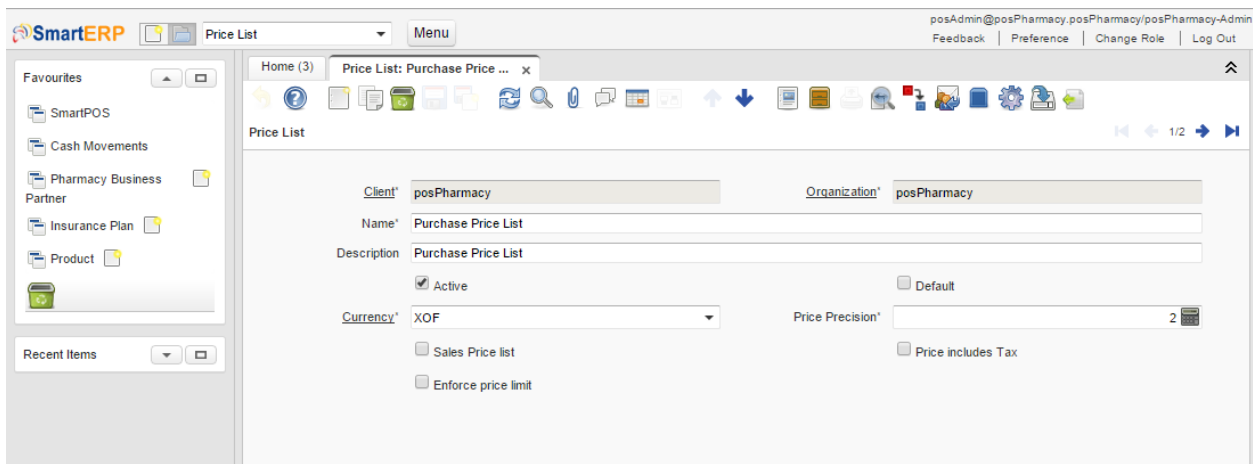


## 5.1. Flexible Tax Models On Products

Support for the two types of taxes:

- tax included
- not included

Remember: The tax included / not included is defined in the price list of each product, and the rule applies to all the products that are on the list price



The screenshot shows the SmartERP interface for configuring a Price List. The main form fields are:

- Client:** posPharmacy
- Organization:** posPharmacy
- Name:** Purchase Price List
- Description:** Purchase Price List
- Active:**
- Default:**
- Currency:** XOF
- Price Precision:** 2
- Sales Price list:**
- Price includes Tax:**
- Enforce price limit:**

Index: <http://www.smartjsp.com/web/en/idempiereFirstSteps>