Product

TL;DR

> This page covers products: the goods you sell, with their tax rate, unit and usual carton. Products are visible to everyone regardless of company, unlike customers and companies. A product's details are copied onto each order as it is created, so renaming one never changes paperwork already raised.

What this is for

A product is one item you sell: its name, how it is taxed, how it is measured, and which carton it usually ships in. Products are picked on every purchase order and flow from there to invoices and packing.

Products are visible to **everyone**, whichever companies they work with. The menu places Product under "Company Data", but unlike customers and companies, a product belongs to no company. Everyone sees one shared list.

Where to find it

Menu: **Company Data** → **Product**.

The list screen

One row per product. Columns: **ID**, **Product Name** (shortened with a hover after 20 characters), **Fixed Carton** (a Yes or No badge), **Carton Size**, **Unit of Measurement**, **GST Percentage**, **Status**, and an actions column.

- The search box (placeholder "Search") settles about a second after typing stops.
- Ten rows show at a time; the selector under the list offers All, 10, 25, 50, 100 and 500.

- Buttons at the top right ("Add new product", "Upload", "Upload History") appear only for readers allowed to use them.

Fields

Field	Rules
Product Name	Required. Must be unique: "Product name already exists.". Up to 255 characters.
To the Order Name	Required, up to 255 characters. The alternative wording printed on "to the order" paperwork. Its hint reads "This will be reflected on the invoice.".
Carton Size (Fixed or Not)	Required, Yes or No. Starts at Yes. Yes means the product always ships in one particular carton.
Carton Size	A carton from the Carton list, shown as "name (size)". Required when the choice above is Yes. Note the label says size, but you are choosing a whole carton.
Unit of Measurement	Required. One of the active units from Unit of Measurement.
HSN Code	Required, digits only: "HSN code must contain only numbers.". HSN is the harmonised goods classification code used on tax paperwork.
GST Percentage	Required, a number above 0 up to 100. GST is the goods and services tax; this is the product's tax rate.

Whether quantities of this product may have decimal places, and how many, comes from the chosen unit of measurement, not from the product itself.

Errors you may see

What happened	Message
Name left empty	"Please enter product name."
Name already used	"Product name already exists."
To the order name empty	"Please enter to the order name."
Fixed carton set Yes but no carton picked	"Please selected a carton size."
Picked carton has been switched off	"The selected carton size is invalid or has been deactivated."

What happened	Message
No unit picked	"Please select a unit of measurement."
HSN code empty	"Please enter HSN code."
HSN code has letters	"HSN code must contain only numbers."
GST left empty	"Please enter GST percentage value."
GST zero or below	"GST percentage must be greater than 0."
GST above 100	"GST percentage must be less than or equal to 100."

Adding a product

1. Select "Add new product".
2. Fill the fields above and select **Save** ("Reset" clears the form, "Cancel" returns to the list).
3. On success: "Product has been created successfully!". The product is active immediately and can be picked on orders straight away.

Changing a product

Edit opens the same form; **Update** saves it, showing "Product has been updated successfully!". The status is switched from the list, not the edit screen. See the caution under "What happens behind the scenes" before correcting a name.

Removing a product

The dialog asks "Are you sure you want to delete this Product?" with "You won't be able to revert this!" and the button "Yes, delete it!".

Removal is refused while the product appears on **any** purchase order, invoice or packing list. That includes orders since revised or removed. The message reads "This record cannot be deleted as it is associated with existing records in the system!". The message does not say which use is blocking.

Switching a product off asks "Are you sure you want to deactive this Product?" ("…active…" when switching on) with "Yes, change it!". Switching off is refused in three cases: an order that is not finished, an invoice still in progress, or a packing list still in draft. The message reads "This record cannot be deactivated as it is currently in use by other active records in the system!". Switching back on is never refused.

Exporting the list

"Export" offers "Excel", "Excel All", "CSV", "CSV All", "PDF", "PDF All". The plain versions take the rows on the current screen. The "All" versions cover every matching product across all pages. If the search box is filled in, only the products matching it. Clear the search first to export everything. Exports also include the To the Order Name, HSN Code and Status, which the screen keeps hidden.

What happens behind the scenes

- The product's details are **copied onto each order** when the order is created: name, to-the-order name, HSN code, unit and decimal rules, and from there onto invoices and packing. Renaming a product, or changing its HSN or unit, changes nothing on paperwork already raised. Only orders created afterwards pick up the new details.
- The GST percentage feeds the tax worked out on invoices for this product.
- A fixed carton is a head start, not a rule: when packing, picking this product fills its carton in automatically, and the packer can still change it.
- Switching a product off only stops it being picked on new work; everything already saved keeps working.

FAQs

Why can everyone see products, even from other companies?

A product belongs to no company, even though the menu places Product under "Company Data". Unlike customers and companies, everyone sees one shared list.

I renamed a product. Why does existing paperwork still show the old name?

The product's details are copied onto each order when the order is created, and from there onto invoices and packing. Renaming a product, or changing its HSN or unit, changes nothing on paperwork already raised; only orders created afterwards pick up the new details.

Does a fixed carton force the packer to use that carton?

No. A fixed carton is a head start, not a rule: when packing, picking the product fills its carton in automatically, and the packer can still change it.

Why is deleting a product refused, and what is blocking it?

Removal is refused while the product appears on any purchase order, invoice or packing list, including orders since revised or removed. The message does not say which use is blocking.

Where do I set how many decimal places a product's quantity may have?

Not on the product. Whether quantities may have decimal places, and how many, comes from the chosen unit of measurement.

The Carton Size field asks for a size, so why am I choosing a carton?

The label says size, but you are choosing a whole carton from the Carton list, shown as "name (size)". It is required when the fixed-carton choice is Yes.

Related pages

- Uploading products from a spreadsheet: adding many at once
- Carton: the box types a fixed carton points at
- Unit of Measurement: where decimal rules come from
- Creating a purchase order: where products are picked

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