Engrana manual

2.23.0

https://help.engrario.com/en/

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Getting started

First steps

Setting up Engrana from scratch, in order, from the company to moving data over from the previous program; the details are in the article for each screen. Companies, reference data, languages and backups are set up by the installation-wide administrator; modules and integrations by an administrator.

1. Company and company details

"Settings → Companies" → "New company". The country is chosen only now: taxes, texts and documents depend on it. Then the company details (name, tax number, address, IBAN, logo) → "Save company details"; while the screen shows "Missing for documents: …", estimates and invoices will have gaps. Details: Companies.

2. Branch, warehouses and cash registers

1. "Add branch" → name, address and "Hourly labour rate excl. IVA", which is prefilled in estimates.
2. On the branch card, "+ warehouse" and "+ cash register" (cash or bank / card terminal); without one, no payment.
3. For each warehouse, "Warehouse purpose in the branch": main, "Workshop", "Showcase", "Online shop".

3. Users and roles

1. "Staff → Employees and roles" → "Invite employee": login, language, role and "Where it applies" → "Create and issue password". Hand over the temporary password in person.
2. Roles: "Service advisor", "Mechanic", "Salesperson", "Purchaser", "Storekeeper", "Branch manager", "Finance / accountant", "Owner/administrator", "External accountant (read-only)"; administrators and finance sign in with a second factor (MFA).
3. Mechanics without a sign-in and hourly costs: the "Employees and rates" tab. Details: Users.

4. Modules, languages and integrations

1. Modules: turn on what you need (online store, tyre storage, invoice recognition and more).
2. Languages and countries: Russian, Spanish and English are built in; customer documents use the country's language.
3. Integrations: tax authority (what is missing for fiscal invoices; the certificate can be uploaded early), "Mail (SMTP)", data and service providers and "Connect Allegro". Without a provider the program works manually.

5. Reference data: work types and taxes

"Settings → Reference data" → "Work types": "Starter set" or "Import" (the template holds 223 jobs with translations). "Tax rates": a new one via "New rate version", only on your gestor's instructions: it cannot be corrected later. Details: Reference data.

6. Supplier price lists and markups

1. "Purchase → Price lists" → "Sources" → "New source": format, how it arrives (manually, FTP, SFTP, link) and schedule — Supplier price lists.
2. "Purchase → Markups" → "New policy": how the purchase price becomes the selling price — Markups.

7. Sales channels

Price list and orders for a regular customer: customer card → "Sales channels" → "Add channel" — Marketplaces and sales channels, Channel price list. Your own website: Online store.

8. Go-live: initial data

"Settings → Go-live", always in this order: customers and suppliers → vehicles → products → retail prices → opening stock → opening debts. Each file is first only checked ("Check: nothing has been saved yet"), then "Apply: save N"; finally, "Reconciliation with the previous program". Details: Go-live: initial data.

Before the first working day

- Backups: the top should show "Last successful backup: …".
- Workshop bookings: the branch's "Bays and opening hours".
- Retention periods: how long customer data is kept.
- Common tasks: what to do where in daily work.

The service advisor's working day

The day of the "Service advisor" role, in order: bookings, vehicle intake, estimate and customer approval, parts, invoice, handover and the cash desk. Each step is covered in detail in the linked screen articles.

Bookings and intake

1. "Workshop" → "Bookings": who is coming and to which bay (Workshop bookings).
2. The customer arrives: in the booking, "Arrived" → "Open repair order". Without a booking: "Repair orders" → "New vehicle intake": plate, customer, mileage, reason for visit → "Receive vehicle" (Workshop).
3. In the repair order, "Inspect vehicle": damage on the diagram, photos, fuel, items → "Complete inspection" (Intake inspection).
4. "Customer signature": the customer reads the receipt, chooses whether they want an estimate first and signs on the tablet; "Vehicle deposit receipt" prints it (Customer signature on the tablet). The car: Vehicle page.

Estimate and approval

1. "Create estimate": labour and parts (the search suggests parts that fit the car) → "Save revision". A part not in the price lists: "Find manually" (Repair order).
2. "Customer approved" or "Customer declined". Or the "Customer link" (or QR code): the customer opens the estimate on their phone and approves it. For an advance, "Payment by link" → "Request payment" (with Stripe connected).

3. The estimate changed? "New revision": the customer approves it again.

Parts, work and handover

1. "Reserve from stock" sets parts aside for the repair order (stock levels in Warehouse).
2. "Start work": the mechanic installs the parts and records the time (The mechanic's working day).
3. Work finished: "Send to quality check", then "Ready for pickup".
4. "Issue invoice" (for the approved labour and the parts installed) → "Take payment"; if a private customer asks, "Full invoice".
5. "Release vehicle": no handover without the final invoice; debt is checked against the customer's payment terms.

Tyres, warranty and old parts

- Tyre storage: "Receive tyres", "Receipt", "Invoice next season", "Pay" and releasing tyres.
- The customer comes back with a complaint: "Warranty" → "New warranty case" → "To diagnosis"; a defective part — "Supplier claim" (Warranty and claims).
- Core deposit: "Old part received from the customer", "Send to supplier" (Core deposits).

End of the day: cash desk

"Finance" → "Cash desk": "Pay in" (float), count the cash → "Close shift" (Documents and finance).

What the role can and cannot do

Can: everything above — bookings, intake, estimate and approval, payment by link, reservations, repair order statuses, invoices and payments (also for tyre storage and customer orders), customers and vehicles, warranty and claims, the cash desk. Warehouse, catalogue and price lists: view only. Cannot (no button, or the program refuses):

- approve or reject a warranty case — the branch manager;
- refund a payment by link (Stripe), "Pay out" from the cash desk or change a customer's payment terms — the branch manager or finance;
- customer returns and "Refund the deposit to the customer" — the salesperson or the branch manager;
- counter sales — the salesperson; receiving goods from a supplier — the storekeeper.

Common messages

- **"No estimate revision approved by the customer."** — work starts only after the customer approves.
- **"The estimate has expired. Prepare a new revision."** — "New revision" and a new approval.
- **"Not signed by customer"** — the inspection is complete but the customer has not signed the receipt yet.
- **"Issue the invoice before handing over the vehicle."** — "Issue invoice" first.
- **"Debt …: give the reason for releasing with debt."** — enter the reason; it goes into the log.

Where next

- Order actions — reservation, invoice and payment for an order; Customer card.
- Manual — search the whole manual.

The mechanic's working day

The day of the "Mechanic" role, in order: cars on the bays, work on the repair order, parts, time and handing the job back. Mechanics do not see customer names or phone numbers — only the car, the reason for visit and the approved estimate.

Start of the day

1. "Workshop" → "Repair orders": the board by stage — "Checked in", "Waiting for approval", "Waiting for parts", "In work", "Ready for pickup". Search by repair order number or plate (Workshop).
2. "Bookings": the day timeline by bay and "On the bays now". The car is on your bay — open the booking, pick yourself in the "Mechanic" field → "Start work"; when finished, "Done" (Workshop bookings).
3. "TV board" on the board: the screen for the workshop TV, cars by stage, no customer data.

Working on the repair order

1. Click the card on the board to open the repair order: reason for visit, approved estimate, parts, time (Repair order).
2. Work is done while the repair order is "In work", and it only gets there once the customer has approved the estimate. Waiting for parts and they have arrived? "Start work".
3. **Parts.** The "Parts" block shows each estimate part: approved, reserved, installed, free in stock. "Install" → quantity, "Mechanic" → "Install": the part leaves stock. You can install part now and the rest when it arrives.
4. **Time.** In the "Work and time" block: "Mechanic" (you), "Labour" from the estimate, "Hours" → "Record".
5. Need to stop (for example, a part is missing)? "More" → "Put on hold" with a reason.
6. Job done: "Send to quality check". The invoice, payment and handing over the car are the service advisor's job (The service advisor's working day).

Found another fault

The mechanic does not change the estimate: tell the service advisor. They prepare a "New revision" and get the customer's approval; then the new part appears in the "Parts" block. A part that is not in the approved estimate cannot be installed.

Tyres and warehouse

- "Tyre storage": find the set by plate or location — you see where the tyres are and which ones (no customer contact details). Tyres are received and released by the service advisor (Tyre storage).
- "Warehouse" → "Stock" and "Product catalogue" → "Items": whether a part is there and how much is free (Warehouse, Product card).

What the role can and cannot do

Can: view repair orders and the estimate, change the repair order status, install parts from the approved estimate, record time, mark "Start work" and "Done" in a booking, view tyre storage, the warehouse and the catalogue. Cannot (no button, or the program refuses):

- receive the vehicle, inspect it, create or approve the estimate — the service advisor;
- reserve parts, issue the invoice or take payment — the service advisor;
- create, move or cancel bookings — the service advisor or the branch manager;
- receive or release tyres — the service advisor; the "Customers" section is not in the mechanic's menu.

Common messages

- **"Parts are installed when the repair order is “In work”."** — "Start work" first.
- **"Time is recorded when the repair order is “In work” or in quality check."** — the same for hours.
- **"No estimate revision approved by the customer."** — the customer has not approved yet: ask the service advisor.
- **"Choose a mechanic to start work."** — no mechanic is selected in the booking.
- **"Work is already in progress on this bay: … Finish or move it first."** — another job is still open on the bay.
- **"Enter a reason."** — "More" → "Put on hold" needs a reason.

Where next

- Repair order — every step; Workshop bookings — bays and times.
- Manual — search the whole manual.

The salesperson's working day

The day of the "Salesperson" role, in order: cash desk, counter, customer orders, payments, returns and closing the shift. Each step is covered in detail in the linked screen articles.

Start of the day

"Finance" → "Cash desk": the opening float and, if needed, "Pay in" (Documents and finance). Then "Sales" → "Orders": what awaits handover and payment, any "reservation shortage" (Customer orders).

Counter

1. "Sales" → "Counter": barcode, part number, EAN or name. Parts for the customer's car: "Registration plate" → "Find parts" (Parts: counter sale).
2. "Add to cart"; for an invoice in the customer's name or their own prices, "Customer (optional)".
3. "Cash" or "Card" → "Pay and hand over": order, handover, invoice and payment in one step. If a private customer asks, "Full invoice" (needs a DNI/NIE on file). You see and enter prices excl. or incl. tax — switch above the cart; the customer pays the price incl. VAT, as on the price tag, and the totals are calculated by the program.
4. Not in the catalogue or at the suppliers: "Find manually" creates the customer order and the supplier order at once.
5. "Restock the showcase" appears above the search: tell the storekeeper — "Move to the showcase" is done by them or the branch manager (The storekeeper's working day).

Customer order

1. "Orders" → "New order": customer and items. Anything not in stock shows up for the purchaser in "What to order". A new customer: "Customers" → "New customer" (Customers).
2. "Order actions": "Reserve from stock", "Hand over" (also in parts), "Invoice handed-over items", "Take payment" (before handover it is an advance) (Order actions).
3. The order's progress — "Order status" on the order page; many orders at once — tick them in the list: "Pick list", "Hand over", "Invoices" (Order page).
4. Orders from the online store, marketplaces (Allegro) and customer files land in the same list; when handing over a marketplace order, fill in "Carrier" and "Tracking number". "Awaiting decision" is for an organisation-wide role.

Returns, warranty and core deposits

1. "Order actions" → "Return": "Condition", "Return warehouse", "Money to the customer"; with inspection, then "Approve" or "Reject". A counter sale is an order too (source "Counter / manual").
2. A complaint about a part: "Warranty" → "New warranty case"; a defect — "Supplier claim" (Warranty).
3. Core deposit: "Old part received from the customer", "Send to supplier" and, once the supplier answers, "Refund the deposit to the customer" (Core deposits).

End of the day

"Cash desk": "Cash counted", "Leave in the drawer as float" → "Close shift". In Poland, also receipts and the daily report (Cash register receipts (Poland)).

What the role can and cannot do

Can: counter sales, customer orders and their statuses, reservations, handover, invoices and payments, customer returns and their inspection, customers and their cars (new car, car card), warranty and claims, core deposits, paying in and closing the shift; view the warehouse, price lists and delivery. Cannot (no button, or the program refuses):

- refund through Stripe (a return on a website order), "Pay out" from the cash desk or change a customer's payment terms — the branch manager or finance;
- approve a warranty case or lower a core deposit — the branch manager;
- receive goods from a supplier or transfer them (including to the showcase) — the storekeeper;
- order from a supplier (other than via "Find manually") — the purchaser;
- set up order statuses, automation, channels and the online store — an organisation-wide manager or the administrator.

Common messages

- **"out of stock"** — create a customer order in "Orders".
- **"This branch has no cash register."** — no payment can be taken: the administrator sets up the register.
- **"The amount … is above the simplified invoice limit…"** — pick a customer with a tax number for a full invoice.
- **"Debt …: give the reason for releasing with debt."** — enter the reason; it goes into the log.

Where next

- Supplier price lists, Product card, Manual — search the manual.

The storekeeper's working day

The day of the "Storekeeper" role, in order: what is arriving and what to pick, supplier receipts, handing over orders, transfers and the showcase, counts and write-offs, defective and old parts. Details are in the linked articles.

Morning: what is arriving and what to pick

1. "Purchase" → "Orders and invoices" → "Awaiting delivery": what should arrive (Purchases).
2. "Sales" → "Orders": tick orders → "Pick list": what to pick and from where (Customer orders).

Receiving from a supplier

1. With a supplier order: "Receive delivery" → document number, quantity and price per line → "To receiving" (Supplier order).
2. Without an order: "Warehouse" → "Goods receipt" → supplier, document number, lines → "To receiving" (Warehouse).
3. A supplier invoice that was sent in or scanned: "Receive goods" on its review screen (Supplier invoice review).
4. "Warehouse" → "Receiving": open the receipt, scan the goods, mark goods not accepted with "Discrepancy" and a reason → "Finish receiving". Only then do the goods go into stock; goods for an order are reserved for it. Without a scanner (if the organisation allows it): "Accept now manually" in step 1 or 2.

Reservations and handover

1. Reservations are made and released by the salesperson, the service advisor and the branch manager. The storekeeper sees them under "Stock": on hand, reserved, available; only what is available can be transferred or written off.
2. Orders with everything in reserve: tick them in "Orders" → "Hand over". One carrier for all, a tracking number per order (for a marketplace order it goes to the marketplace). Anything not issued is listed with the reason.
3. Change the status of orders in the "In progress" and "Sent" groups (Order page). Carrier contracts and parcel prices: "Logistics" → "Delivery", view only (Delivery).

Transfers and the showcase

1. "Warehouse" → "Transfers" → "New transfer": same branch — "Move"; another branch — "Send", and at the destination "Receive goods" (anything not received stays "In transit"). A part for an order: "For order …" on the line — the order's reservation moves with it.
2. The counter sold from the "Showcase": in "Transfers", the "Restock the showcase" list → "Move to the showcase", one transfer from the main warehouse (Parts: counter sale).

Counts and write-offs

1. "Stocktake" → "Start stocktake" → "Counted" per line (or "Count from file") → "Save count". Enter it as soon as you count: sales after a line is counted do not change its difference.
2. Write-off: "New write-off" → items, reason, expense category → "Save draft". "Post stocktake", "Write off" and kits (disassembly and assembly, which the storekeeper prepares as drafts) are

posted by the branch manager.

Defective and old parts

1. A supplier defect: "Warranty" → "Supplier claims" → "New claim" (Warranty and claims). A customer return marked "Defective" stays reserved for that return until the supplier claim.
2. Old parts with a core deposit: "Old part received from the customer", tick rows → "Send to supplier (N)" (Core deposits).

What the role can and cannot do

Can: goods receipts and receiving deliveries, transfers (including to the showcase), pick lists and handing over orders, the "In progress" and "Sent" statuses, drafts of stocktakes, write-offs and kits, supplier claims, receiving and sending old parts. View: catalogue, stock, supplier orders, delivery. Cannot (no button, or the program refuses):

- post a stocktake, write-off, disassembly or assembly — the branch manager;
- reserve or release stock — the salesperson, the service advisor or the branch manager;
- order from a supplier or create a supplier return — the purchaser or the branch manager; record the supplier invoice — the purchaser, finance or the branch manager;
- create or change catalogue items — the purchaser or the branch manager; sell or invoice — the salesperson.

Common messages

- **"A storekeeper changes the status only of orders “In progress” and “Sent”."** — other statuses: the salesperson.
- **"reservation shortage"** — there is less in stock than in the order: wait for the receipt.
- **Not enough available** when transferring or writing off — part of the goods is reserved for orders.

Where next

- Warehouse — stock, receipts, transfers and stocktake in detail; Manual — search.

The branch manager's working day

A guide for the "Branch manager" role: what to do every day, every week and every month, and on which screens. The role covers all documents of the branch, decisions, reports and branch employees, but not settings or sign-ins.

Every day

- **Workshop.** The repair order board shows what is waiting for approval, parts or pickup. On the repair order the manager can do everything the service advisor does: estimate, "Customer approved", invoice, payment and handing the car back.
- **Bookings.** Workshop bookings — who is coming and to which bay. The manager sets up the branch's bays and hours in "Bays and opening hours".
- **Orders.** Customer orders — clear "Awaiting decision", including "Website payment needs a decision" and "Unrecorded Stripe payments". Only a company-wide role sees this queue: it is not tied to a branch.
- **Manager's decisions.** "Approve" or "Reject" a warranty case in Warranty and claims. "Deposit to customer" for a part the supplier rejected, and a discount on a deposit, in Core deposits. "Write off" and "Post stocktake" for the storekeeper's drafts in Warehouse.
- **Refunding a Stripe payment.** In "Documents" open the payment → "Cancel document" with a reason: Stripe refunds the money to the customer's card (how it works). For a website order, a return "through the marketplace" on the customer order.
- **Cash desk.** Documents and finance → "Cash desk": "Pay in", "Pay out" and, at the end of the day, "Close shift" with a cash count.

Every week

- **Purchasing.** Purchases: "What to order", supplier orders, "Invoices to review". A disputed invoice and paying a supplier — Supplier invoice.
- **A supplier's new bank account.** "Confirm" on the account in the supplier's card, if someone else entered it.
- **Customers.** "Payment terms" (deferred payment and credit limit) and "Export data (GDPR)" on the customer card.
- **Suppliers.** Supplier rating: signals and "Signal thresholds".
- **Prices.** Prices to review and Markups, with a company-wide role.

Every month

- **Reports.** Documents and finance: "Revenue", "Income & expenses", "Bank" (statement) and "P&L and Cash Flow".
- **Employees and hourly rates.** Users → "Employees and rates": the branch's employees, position, hourly cost and link to a sign-in.
- **Marketplace payouts.** Marketplace settlements, with a company-wide role.

What the role can and cannot do

- **Can:** create, post and cancel documents of every type in the branch; approve warranty cases; decide on core deposits; post write-offs and stocktakes; refund Stripe payments; confirm supplier

bank accounts; change customers' payment terms; manage the branch's employees and their hourly cost.

- **Only with a company-wide role:** the "Awaiting decision" queue in orders, "Markups", "Prices to review", "Sales channels", marketplace payouts, "Integrations", "Go-live" and setting up order statuses.
- **Cannot:** invite employees or assign roles, change "Companies", "Reference data" or "Modules", or view the "Audit log" — that is the administrator. "Taxes", the "For the gestor" package and closing a period belong to finance. Only an administrator can erase a customer's data (GDPR).

Where next

- Users → "What roles can do" — the exact permissions of each role.
- Manual — search across all articles.

The accountant's working day

A guide for the "Finance / accountant" role: what to do every day, every week and at the end of the month or quarter. Almost everything is on Documents and finance (the "Finance" menu) and in Purchases.

Signing in

The role requires sign-in with a second factor (MFA): at the first sign-in the program asks you to set up an authenticator app. New phone — the administrator presses "Reset MFA" (Users).

Every day

- **Cash desk and revenue.** "Cash desk": "Pay in", "Pay out", "Close shift" with a count. "Revenue" — sales and payments by day and payment method.
- **Customer invoices and payments.** The "Documents" tab: find a document and its postings, "Service invoice", "Take payment". A wrong fiscal invoice — "Cancel invoice" or "Corrective invoice" (details).
- **Refunding a Stripe payment.** Open the payment → "Cancel document" with a reason: Stripe refunds the money to the customer's card (how it works).
- **Paying suppliers.** Purchases → "Debts and expenses" → "Pay"; in "Supplier invoices", the "To pay" and "Disputed" filters. A supplier's new bank account — "Confirm" in the supplier's card, if someone else entered it.

Every week

- **Bank.** "Bank": upload a statement (Norma 43 or CSV) and the program matches payments to documents.
- **Purchase invoices.** Supplier invoice: check against the goods receipt, price difference, dispute ("Disputed", "Close the dispute"), VAT self-assessment. Scans and e-invoices — supplier invoice review.
- **Income and expenses.** "Income & expenses" — payments without an invoice (rent, phone) by category.
- **Marketplaces.** Marketplace settlements: payouts, deductions, exchange differences. This needs a

company-wide role: the marketplace account is shared, and with a single-branch role the program refuses.

- **Customer debts.** "Payment terms" — deferred payment and credit limit — on the customer card.

Every month and quarter

- **By the 15th.** "Taxes" → "Paid by companies, not delivered" → "Issue advance invoices".
- **Taxes.** "Taxes": "Modelo 303: VAT for the period", Modelo 349, 369 (OSS) and, for the year, 347 → "XLSX" for the gestor. Once the 303 is filed — "Mark as filed".
- **Reports.** "P&L and Cash Flow" — profit and cash movement for the period.
- **Package for the gestor.** "For the gestor" → period → "Download package"; if there are exceptions you cannot fix now — "Download as "incomplete"".
- **Closing a period.** Closing a period is a right of finance and the administrator. In a closed period documents are neither posted nor changed: "The period is closed up to … A document dated … cannot be changed."
- **31 December.** "Revaluation at date" of a marketplace debt in another currency — in Marketplace settlements.

Once, at go-live

Customers' and suppliers' opening debts — Go-live, with a company-wide role.

What the role can and cannot do

- **Can:** customer invoices and payments, the cash desk (including pay-outs), bank, income and expenses, supplier invoices and payments, marketplace payouts, taxes, the package for the gestor, reports, closing a period, Stripe refunds, customers' payment terms and confirming supplier bank accounts. Finance sees all documents and costs.
- **View only:** repair orders, sales, supplier orders, goods receipts and other warehouse documents.
- **Cannot:** change customer and supplier cards (except payment terms), users, roles or settings — that is the administrator.

Where next

- The branch manager's working day — who else handles the branch's money.
- Manual — search across all articles.

The administrator's working day

A guide for the "Owner/administrator" role: what to check every day, every week and every month, and what to do when something changes. The role has every permission in its scope: settings, users, integrations and modules.

Sign-in and scope of the role

- **Sign-in only with a second factor (MFA).** An administrator does not change their own password, second factor or block status — another administrator does (Users).
- **The whole-installation administrator** sees and changes everything: "Backups", "Retention periods", "Languages and countries", reference data, new companies, whole-installation integrations, the entire "Audit log" and erasing customer data (GDPR).
- **A company administrator** — the company details, branches, warehouses and cash desks of their company, users with roles in it, its modules and integrations and its audit log entries.
- **A single-branch administrator** cannot see the audit log, change modules or see connected providers.

Every day

- **Backups.** Backups: "Last successful backup" — a warning appears when there has been no successful backup for more than 26 hours. Before an update — "Back up now".
- **Employees.** Users: "Invite employee" → role and "Where it applies"; "Assign role", "Remove role"; "Reset password", "Reset MFA", "Lift sign-in pause"; for someone who leaves — "Block".

Every week

- **Audit log.** Audit log: who changed a document or a setting; a red mark means the action was refused or failed.
- **Integrations.** Integrations: tax authority — "What is missing" and the certificate expiry; providers — "Test"; email (SMTP).

Every month

- **Retention periods.** Retention periods: what the nightly clean-up will remove. "Run clean-up now" cannot be undone.
- **Attachments.** "Check attachments" in Backups: are all the files in place.

When something changes

- **A new company, branch, warehouse or cash desk**, the branch's labour rate — Companies.
- **A new VAT rate** (in advance, with a date), work types — Reference data.
- **Interface translation or a new language** — Languages and countries.
- **Another part of the program is needed** — Modules.
- **Moving over from the previous program** — Go-live.
- **A customer asks for their data to be erased** — "Erase data (GDPR)" on the customer card (whole-installation administrator).

What even the administrator cannot do

- Delete a user — only "Block"; the last whole-installation administrator cannot be blocked.
- Restore a backup from the screen: the server administrator does that, into a new empty database.
- Change a company's country or delete a company that already has documents.
- Enable a module marked "not licensed" or add a country: that is the Engrana supplier.
- Edit or delete audit log entries.

Where next

- The branch manager's working day and the accountant's working day — what the roles you give access to do.
- Users → "What roles can do".

Common tasks

The most frequent jobs in the program, one line each: where to start and which article has the details. If you cannot see the button, you do not have permission for that action: ask your administrator.

Workshop

- Book a customer in for a time slot: "New booking" on the day timeline — Workshop bookings.
- Take a car in for repair: "New vehicle intake" → "Receive vehicle" — Workshop: vehicles in progress.
- Inspect the car and get the customer's signature: "Inspect vehicle" → "Complete inspection" → "Customer signature" — Intake inspection, Customer signature on the tablet.
- Make an estimate and get approval: "Create estimate" → "Customer approved" or "Customer link" — Repair order.
- Order a part for a repair order: once the estimate is approved, "What to order" → "Order selected" — Purchases; not in any price list, "Find manually" next to the estimate — Repair order.
- Invoice the repair and take payment: "Issue invoice" → "Take payment" — Repair order.
- Store a customer's tyres: "Receive tyres" — Tyre storage.

Sales

- Sell a part at the counter: "Add to cart" → "Pay and hand over" — Parts: counter sale.
- Create a customer order for later delivery: "New order" — Customer orders.
- Invoice a company: for goods handed over, "Invoice handed-over items" in Order actions; for services without a repair order, "Documents" → "Service invoice" — Documents and finance.
- Give a private customer a full invoice instead of a simplified one: "Full invoice", with a DNI/NIE on the card — Parts: counter sale.
- Take back goods from a customer: "Order actions" → "Return" — Order actions.
- Refund the customer when the goods never arrived: "Cancel with refund" — Order actions.
- Send your price list to a regular customer: "Sales channels" on the customer card — Channel price list.

Purchase

- Find who has a part and at what price: "Search offers" — Supplier price lists.
- Order for stock, without a customer order: "What to order" → "Stock order" — Purchases.
- Record a supplier invoice: "Record invoice" or "Invoices to review" — Supplier invoice, Supplier invoice review.
- Pay a supplier: "Pay" on the invoice — Supplier invoice.
- Send a faulty part back to the supplier: "Supplier claims" → "New claim" — Warranty and claims.

Warehouse

- Receive goods from a supplier: "Receive delivery" → "To receiving" → "Warehouse" → "Receiving" — Supplier order.
- Move goods between warehouses: "Transfers" → "New transfer" — Warehouse.
- Write off goods: "Write-offs" → "New write-off" — Warehouse.
- Count the stock: "Start stocktake" → "Post stocktake" — Warehouse.

Finance

- Close the cash shift: the "Cash desk" tab — Documents and finance.
- Cancel a wrong document: "Cancel document" — Documents and finance.
- Correct an issued invoice: "Corrective invoice" or "Cancel invoice" — Documents and finance.
- Prepare data for the gestor: "Taxes" (modelos 303, 349, 347) and "For the gestor" → "Download package" — Documents and finance.
- Print receipts in Poland: "Print all" — Cash register receipts (Poland).

Settings

- Give or remove an employee's access: "Invite employee", "Block" — Users.
- Make a backup: "Back up now" — Backups.
- Export or erase a customer's data at their request: "Export data (GDPR)", "Erase data (GDPR)" — Customer card.

Setting up from scratch is in First steps; terms are in the Glossary.

Glossary

Terms you meet in the program and in Spanish and Polish documents, explained briefly, with the article where you work with them. How the law shapes them is summed up in What the law requires.

Spain

- **AEAT** — the Spanish tax agency (Agencia Tributaria). The company certificate for it is uploaded under Integrations.
- **albarán** — the delivery note that comes with a supplier's goods. Its number is entered as the supplier's document number on the goods receipt: Warehouse.
- **Bizum** — a Spanish mobile payment; the customer uses it on the Stripe payment page, on the website or by link: Online store, Repair order.
- **factura completa** — a full invoice with the buyer's details. A private customer gets one on request, with a DNI/NIE on their card ("Full invoice"): Parts: counter sale.
- **factura simplificada** — a simplified invoice (till receipt), usually without buyer details; in Spain the program issues it up to €400 including VAT (RD 1619/2012, art. 4); for some retail sales the law allows up to €3,000, so check with your gestor: Parts: counter sale.
- **factura rectificativa** — a corrective invoice: the only way to correct an issued invoice (besides "Cancel invoice"). It has its own number series: Documents and finance.
- **factura de anticipo** — an advance invoice: Repair order.
- **gestor, gestoría** — an external accountant. They get the "External accountant (read-only)" role and the gestor package: Documents and finance.
- **inversión del sujeto pasivo** — reverse charge: the note on an invoice without IVA to a company in another EU country for a repair or a service: Customer card.
- **IRPF, retención** — income tax withholding. A self-employed professional with "Retención IRPF" in the company details (15% or 7%) invoices services to businesses with withholding; on a supplier, the "We withhold IRPF" flag: Documents and finance, Customer card.
- **IVA** — Spanish VAT: 21%, 10%, 4% and 0%. Rates are in Reference data.
- **modelo 303, 349, 347** — tax returns: 303 is IVA for the month or quarter, 349 is transactions with EU companies, 347 is counterparties above €3,005.06 a year. The program calculates them on the "Taxes" screen and produces an XLSX for the gestor: Documents and finance.
- **NIF, NIE, CIF** — tax numbers: everyone has a NIF (for a person, their DNI number), a foreigner has an NIE (X, Y or Z, 7 digits and a letter), and CIF is the old name for a company's NIF. The program checks the control character: Customers.
- **OSS** — the EU One-Stop Shop for sales to private buyers in other EU countries. Above €10,000 a year, the buyer's country's VAT applies and modelo 369 is filed: Documents and finance.
- **presupuesto, resguardo de depósito** — the repair estimate and the vehicle deposit receipt: Repair order, Customer signature on the tablet.
- **recargo de equivalencia** — a special IVA scheme for retailers. Vehicle parts and accessories are excluded from it (art. 59.2 RIVA); the tax profile on the "Taxes" screen warns about this: Documents and finance.
- **SII** — Suministro Inmediato de Información: IVA books sent to the AEAT almost immediately; mandatory above €6,010,121.04 annual turnover and in REDEME. The program does not send to the SII; the tax profile knows that 390 and 347 are then not filed: Documents and finance.

- **TPV** — a card terminal. In the program, a "Bank / card terminal" cash register: Companies.
- **Verifactu** — requirements for invoicing software (RD 1007/2023): each invoice is a chained, hashed register record, with a QR code on the invoice and submission to the AEAT. The program turns submission on for the mandatory date: Integrations.
- **VIES** — the check of an EU company's VAT number; an invoice without IVA only goes to a valid number: Customer card.

Poland

- **biała lista** — wykaz podatników VAT: the bank accounts of VAT payers. Paying more than 15,000 zł to an account not on the list loses the right to deduct the expense; check it with "Check on the biała lista": Customer card.
- **BLIK** — a Polish mobile payment; the customer uses it on the Stripe payment page: Online store.
- **ewidencja oczywistych pomyłek** — the register of receipts with an obvious error, kept separately from the ewidencja zwrotów i reklamacji; the program keeps it itself: Cash register receipts (Poland).
- **ewidencja zwrotów i reklamacji** — the register of returns and complaints on register receipts. A sale on the register is not cancelled: an entry in the ewidencja reduces it, and the program keeps it itself: Cash register receipts (Poland).
- **faktura do paragonu (FP)** — an invoice for a receipt already printed, on the buyer's request, no later than 3 months after the end of the sale month; to a company only if its NIP was on the receipt: Cash register receipts (Poland).
- **JPK_V7M** — the monthly VAT ewidencja and deklaracja file. For a Polish company, on the "Taxes" screen, "JPK file (XML)"; each register adds RO, ZW and PB lines: Cash register receipts (Poland).
- **kasa fiskalna** — a fiscal cash register; in the program, a POSNET drukarka fiskalna over USB and the "Register receipts" page: Cash register receipts (Poland).
- **KSeF** — Krajowy System e-Faktur. An invoice to a company exists only once KSeF accepts it: it then has a KSeF number and a QR code; it is corrected with a corrective invoice: Documents and finance.
- **NIP** — the Polish tax number; on a receipt, if the company asks, before printing: Cash register receipts (Poland).
- **paragon** — a till receipt for a private buyer. A receipt with a NIP up to 450 zł already counts as a faktura uproszczona: Cash register receipts (Poland).
- **raport dobowy, raport miesięczny** — the register's daily and monthly reports: Cash register receipts (Poland).

Program terms

- **repair order** — the repair of one car: inspection, estimate, parts, mechanics' time, invoice and payment: Repair order.
- **estimate, revision** — what will be done and for how much; the customer approves a revision, and a changed estimate needs a new revision: Repair order.
- **reservation** — goods set aside for an order or repair order that will not go to another customer; "available" is stock without reservations: Warehouse.
- **customer order** — a sale of goods: reservation, hand-over (in parts too), invoice, payment and return: Order actions.
- **advance invoice** — an invoice for payment before hand-over; the final invoice deducts it with an "A

deducir" line: Repair order, Order actions.

- **corrective invoice, cancelling an invoice** — how an issued invoice is corrected: it cannot be cancelled like an ordinary document: Documents and finance.
- **special order, no return** — a part ordered for the customer outside the price lists: it is not taken back just because the customer changes their mind, but the warranty stays: Parts: counter sale.
- **goods receipt** — taking a supplier's goods into stock: Warehouse.
- **core deposit** — added to the price of a part and refunded when the customer brings back the old one: Core deposits.
- **warranty case, supplier claim** — a customer's complaint about a part or a job, and a claim against the supplier: Warranty and claims.
- **sales channel** — a customer who gets your price list and sends orders, or a marketplace (as agent or as buyer): Marketplaces and sales channels.
- **marketplace payout** — what the marketplace transfers for orders, minus deductions (commission, shipping, returns): Marketplace settlements.
- **price policy** — the rules that turn the purchase price into the selling price: Markups.
- **blocking, anonymisation** — what happens to a customer's data on request and when the retention period ends: Retention periods.

What the law requires

What the program does on its own so that work follows Spanish and Polish law, and which rules it relies on. This describes the program; it is not legal advice: take final decisions on taxes, documents and customer data with your gestor (Spain) or księgowa (Poland). Rules are cited as of this program version and may change.

Spain: invoices

- **Numbering and no changes.** An invoice gets its series number when posted, with no gaps; full, simplified and corrective invoices have their own series (RD 1619/2012). An issued invoice is never edited or deleted: it is corrected only with a corrective invoice (factura rectificativa, art. 15 RD 1619/2012) or with "Cancel invoice" — Documents and finance.
- **Simplified invoice** (till receipt): the program issues it up to €400 including IVA (RD 1619/2012, art. 4); above that you need a buyer with details for a full invoice. For some retail sales the law allows up to €3,000 — check with your gestor — Parts: counter sale.
- **Advance payments.** A private customer gets the advance invoice when paying; a company, if the goods are not handed over in the same month, by the 15th of the following month (art. 11 RD 1619/2012) — Repair order, Order actions.
- **Verifactu** (RD 1007/2023, Orden HAC/1177/2024). Every invoice and every cancellation is a record in the program's register, chained with hashes. Submission to the AEAT and the QR code on the invoice are switched on at the server for the mandatory date; until then the invoice is printed with its series number and no QR. Dates under RDL 15/2025: 1 January 2027 for Impuesto sobre Sociedades taxpayers and 1 July 2027 for everyone else; a postponement has been announced, so check with your gestor. The company certificate can be uploaded and checked in advance — Integrations.
- **SII.** If the company must keep its IVA books in the SII (art. 62.6 and 71.3 RIVA), the program does

not send them there: how to handle the SII is decided with your gestor — Documents and finance.

- **IVA by buyer.** Goods to a company in another EU country with a VIES-valid number: no IVA (art. 25 LIVA); repairs and services to such a company: no IVA, with "Inversión del sujeto pasivo" (art. 69 LIVA) — Customer card.
- **Tax returns.** The program calculates modelo 303, 349, 347 and 369 and exports them to XLSX; the gestor files them — Documents and finance.
- **Cash.** Per transaction, under €1,000, private customers included; with a private customer who is not tax resident in Spain, under €10,000 (Ley 7/2012, art. 7). Above the limit the program will not accept cash: take the rest by transfer or card. The limit applies to customer payments too — Documents and finance, Supplier invoice.

Spain: workshop

- **Right to an estimate** (RD 1457/1986). The customer gets a written estimate and can waive it only expressly: they choose when signing the vehicle deposit receipt — Customer signature on the tablet.
- **Estimate validity**: at least 12 working days; the program sets 12, after that a new revision is needed. Work and parts outside the approved estimate need a new revision and the customer's approval — Repair order.
- **Vehicle deposit receipt** (resguardo de depósito): the car's condition, items left in it, fuel and the customer's signature — Intake inspection.
- **Used or rebuilt parts**: only with the customer's written consent; the program asks how it was obtained — Repair order.
- **Repair warranty**: 3 months or 2,000 km (RD 1457/1986), printed on the repair invoice; a branch with a workshop has the "Nº Registro Especial" in its details — Warranty and claims, Companies.
- **Special-order part, no return.** In-store purchases carry no 14-day right of withdrawal (art. 102 TRLGDCU), but the legal warranty for defects remains (art. 114–124 TRLGDCU); the text is printed on the order — Parts: counter sale.

Spain: customer data (GDPR, LOPDGDD)

- **Documents**: 6 years from the end of the year of the customer's last document (Código de Comercio art. 30; RD 1619/2012 art. 19; Ley 58/2003 art. 66); after that the customer's data is anonymised — Retention periods.
- **Erasure on request** (GDPR art. 17): with no documents still kept, anonymisation at once; with documents, blocking until the period ends (LOPDGDD art. 32), and only the installation-wide administrator sees the card — Customer card.
- **Data export on request** (GDPR art. 15 and 20): "Export data (GDPR)" — Customer card.
- **Log of access to personal data and of sign-ins**: 3 years (LOPDGDD art. 72–74); a customer with no documents: 2 years, a period chosen by the program under the storage-limitation principle (GDPR art. 5.1.e), not set by law; backups: 35-day rotation — Audit log, Retention periods.

Poland: invoices and KSeF

- **KSeF** (ustawa o VAT, art. 106na). An invoice to a company exists only once KSeF accepts it: the program hands it over and prints it after acceptance, with the KSeF number and a QR code. An accepted invoice is corrected with a corrective invoice (faktura korygująca); "Cancel invoice"

appears only on an invoice KSeF rejected — Documents and finance.

- **KSeF dates**: large taxpayers from 1 February 2026, others from 1 April 2026 and the smallest from 1 January 2027; check with your księgowa.
- **Private buyers** get a paragon from the register, not a KSeF invoice. An invoice for the receipt on request, no later than 3 months after the end of the sale month (art. 106b ust. 3); to a company only if its NIP was on the receipt (art. 106b ust. 5) — Cash register receipts (Poland).
- **Split payment.** An invoice to a company above 15,000 zł with vehicle parts carries "mechanizm podzielonej płatności" (art. 106e ust. 1 pkt 18a ustawy o VAT).
- **Cash** between businesses: at most 15,000 zł per transaction (Prawo przedsiębiorców, art. 19).
- **Biała lista.** A supplier's bank account is checked against the wykaz podatników VAT; paying more than 15,000 zł to an account not on the list loses the right to deduct the expense — Customer card.
- **JPK_V7M**: the program builds the month's VAT ewidencja and deklaracja from KSeF-accepted invoices, supplier invoices and register receipts — Cash register receipts (Poland).

Poland: cash register and paragon

- **Kasa fiskalna** (art. 111 ust. 1 ustawy o VAT): a sale to a private buyer is registered no later than the day of payment; for vehicle parts and repairs from the very first sale (rozporządzenie MF z 17.12.2024). The program queues the receipt, and a parcel does not leave without a printed receipt — Cash register receipts (Poland).
- **Returns and erroneous receipts**: a sale on the register is not cancelled; the program keeps two separate registers: returns and complaints go to the ewidencja zwrotów i reklamacji, receipts with an obvious error to the ewidencja oczywistych pomyłek (rozporządzenie MF w sprawie kas rejestrujących) — Cash register receipts (Poland).
- **Raport dobowy**: the station prints it itself before the first receipt of a new day; the raport miesięczny is made on the device — Cash register receipts (Poland).

Poland: customer data (RODO)

- **Documents**: 6 years from the end of the document's year (Ordynacja podatkowa art. 70 § 1 i art. 86 § 1; ustawa o VAT art. 112 i 112a). Longer periods (for example, with zawieszenie biegu przedawnienia) the program does not know: they are kept manually — Retention periods.
- **Erasure on request** while documents are kept: refused under art. 17 ust. 3 RODO; the data stays closed until the period ends and is then anonymised — Retention periods.
- **Access log**: 5 years (Kpa art. 189g § 1) — Audit log.

Workshop

Customer signature on the tablet

In short

The vehicle deposit receipt (resguardo de depósito) for the customer: the work requested, the car's condition with the damage diagram, fuel and belongings. The customer chooses whether they want a written estimate first and signs with a finger. Everything the customer reads is in the language of the country's documents; the program menu is closed.

Why it matters

- Record the vehicle's condition at intake, so there is no argument about scratches later.
- Get the customer's consent and their choice about the estimate, as workshop regulations require.

Who can

Open the screen and hand over the tablet — service advisor and branch manager. The customer signs. The "For staff" buttons at the top are "Close" and "To the repair order".

How to do it

1. First finish the inspection on "Intake inspection" and press "Customer signature".
2. Hand the tablet to the customer. They read the receipt, check the name and choose "Solicito presupuesto previo por escrito" (I want a written estimate first) or "Renuncio expresamente al presupuesto previo" (I waive the estimate).
3. The customer ticks that they have checked the vehicle's condition, signs in the box ("Borrar" to clear) and presses "Firmar".
4. The customer sees a thank-you message and hands the tablet back. The signed receipt is in the repair order: you can print it or send it to the customer.

Common messages

- **"Complete the inspection first…"** — the customer signs only the recorded condition of the vehicle.
- "Firmar" does nothing — the signature, the name, the estimate choice or the consent tick is missing.

Questions and answers

Can the receipt be signed again or corrected after signing? No: a signed receipt cannot be signed a second time ("The customer has already signed the receipt."). The PDF printed is exactly the one the customer signed, even if the repair order data change later.

What does "The receipt changed while the customer was reading it. Open the signature screen again." mean? Something on the receipt changed while the customer was reading it — for example, the customer or vehicle details — and the signature was not saved. Press "Close" and then "Customer signature" again: the customer signs what they see now.

Why is the signature not accepted? "The signature is empty or too short: please sign again." — the

stroke is too small, for example a dot or a short line. Press "Borrar" and sign again inside the box.

What does the customer's estimate choice change? The choice ("Solicito presupuesto previo por escrito" or "Renuncio expresamente al presupuesto previo") is kept on the signed receipt and shown in the repair order, in the "Intake inspection" block ("requests an estimate" or "waived the estimate"). It does not create or cancel the repair order's estimate: that is prepared and approved as usual.

Can the customer's signature be taken later? Yes: at any time after the inspection is completed, while the receipt is unsigned, with the "Customer signature" button in the repair order's "Intake inspection" block. Until then the block says "The customer has not signed the receipt yet".

Where next

- "Intake inspection" — damage, photos, fuel.
- The repair order — the deposit receipt and the estimate.

Intake inspection

In short

The vehicle inspection at intake, from a phone or tablet right in the yard. A car diagram to mark damage with photos, general photos, fuel, items left in the car and condition notes.

Why it matters

- Record the vehicle's condition before the repair together with the customer, so there is no argument over a scratch later.
- Get the customer's signature on the vehicle deposit receipt (Resguardo de depósito).

Who can

Running the inspection and taking the signature: the service advisor and the branch manager. Others see the inspection in the repair order without changing it.

How to do it

1. **Check earlier damage.** Yellow marks were recorded earlier: check them on the car. If the damage is gone, open it → "Damage no longer present" → why (repaired here, elsewhere, part replaced).
2. **Mark new damage.** Tap the damaged spot on the diagram → "What is here?": type, note and photo → "Done". The diagram can be zoomed in and out. A mistaken mark can be deleted until the inspection is completed.
3. **General photos.** All four sides, the odometer, the interior: anything you may need in a dispute.
4. **Fuel, items, notes.** Fuel level, "Items left in the car" (child seat, papers, charger…), "Condition notes".
5. **Complete.** "Complete inspection" → confirm. After that, marks and photos cannot be deleted or moved.
6. **Signature.** "Customer signature" — hand the tablet to the customer: they read the receipt and sign with a finger. "Vehicle deposit receipt" — print the receipt.

Common messages

- **"Inspection marks are locked. Mark new damage on the vehicle page."** — the inspection is already completed.
- **"Not signed by customer"** — the inspection is completed but the customer has not signed: have them sign the receipt.

Questions and answers

What can I change after "Complete inspection"? Marks and their notes, fuel, items and condition notes can no longer be changed, and the inspection cannot be reopened. You can still add photos: general ones and ones for damage that is not resolved. Damage that is gone is marked "Damage no longer present" and stays on the deposit receipt; new damage is marked on the vehicle page.

Why is there no "Delete mark" button? Only a mark from an inspection that is not completed can be deleted. Earlier (yellow) marks, marks made on the vehicle page and marks of a completed inspection are not deleted: if the damage is gone, use "Damage no longer present" with the reason; it leaves the diagram and stays in the vehicle history with its photos.

Why can't a photo be deleted? A photo taken before the inspection was completed records the vehicle's confirmed condition: instead of the bin it shows "Intake inspection photos cannot be deleted". You can delete a photo of an inspection that is not completed, or one added after completion.

How do I open the inspection on a phone? In the repair order, "Intake inspection" block → "On a phone": point the phone or tablet camera at the QR code and sign in with your own user. The same inspection opens.

Why is there no "Customer signature" button? On the inspection screen it appears after "Complete inspection", while the customer has not signed the receipt, and only for the service advisor and the branch manager. In the repair order's "Intake inspection" block everyone sees the button, but without that right "Firmar" stays disabled on the signature screen. After signing it is gone: the top shows "Signed: …".

Where next

- Repair order — work and parts for this vehicle.
- Vehicle page → "Damage" — all damage on the vehicle.

Repair order

In short

The whole repair of one vehicle on one page. At the top: the vehicle, number, intake date, mileage, status and the repair progress in eight stages (Vehicle intake → Estimate → Approval → Parts → Repair → Control → Ready → Vehicle handover; "On hold" and "Cancelled" are marked on the progress bar). Below it, "Next step": what is left to do and a single button; other actions (put on hold, cancel, vehicle deposit receipt, customer link) are under "More". Further down are the blocks "Estimate", "Parts", "Work and time", "Invoice and payment", "Intake inspection" and "Result and history": a collapsed block shows a one-line summary, a click opens it (several can be open), and the block of the current stage is open from the start. On the right (on a phone, under the header): money (per estimate, paid, left to pay), the customer and their payment terms, the customer link, the complaint at intake and the support line.

Why it matters

- Run the repair step by step: intake → diagnostics → approval → parts → work → quality check → handover.
- Get the customer's written approval of the estimate — in the program or through a link on the customer's phone.
- Ask the customer to pay by the link (Stripe): an advance on the estimate or the balance, in the "Payment by link" block. The money is recorded on the "Stripe" account against the repair order: a "Bank / card terminal" cash register with "Payment service: Stripe" (in "Companies").
- Invoice exactly the approved work and the parts actually installed.

Who can

The estimate, statuses, invoice and payment are handled by the service advisor and the branch manager. Mechanics install parts and record time. Finance sees the repair order and its result. No button means no permission: ask your administrator.

How to do it

1. **Intake inspection.** "Inspect vehicle": damage on the diagram, photos, customer signature. The vehicle deposit receipt is printed with that diagram.
2. **Estimate.** "Create estimate" → labour and part lines with quantity (hours) and price excl. VAT → "Save revision". Changed the estimate? "New revision" — the customer approves it again. Parts are matched to the order's car: the part search shows only those that fit it ("fits" by KType, "check" by make, model and years); with text the whole catalog shows, fitting parts first; the cross next to the car goes back to the normal search. **Oil.** "Find oil" → viscosity (5W-30), specification or approval (ACEA C3, VW 504 00), JASO and litres → "Find": catalog oils with availability (the "traffic light") and price; for the litres needed, the cheapest set of cans of the same oil ("Add the set"). "This car's oil" shows what and how much went in last time — "Add the same" or "Find similar". **Oil by engine code.** If the car has an engine code, after the oil is fitted the program offers "Save the oil for engine …" (service advisor or manager). The record is shared by every car with that engine: the oil search shows "Engine … usually takes …" and "Find by it"; to correct it, "Edit". **Tyres.** Part search understands a tyre size: "205/55 R16", "205 55 16 91V" finds tyres of that size by the "Tyres" characteristics or the marking in the name. "This car's tyres" above the estimate lists sizes fitted to it (repair orders) and what we keep in storage; a click adds a part line searching that size. "Tyre

fitting" adds the work per wheel — fitting and balancing, valve, old tyre disposal (NEU-MONTAJ, NEU-VALVUL, NEU-RECICLAJE, "Tyres" module); wheels: the tyres in the estimate, or 4.

3. **Customer approval.** "Customer approved" (in "Next step" or on the estimate revision): in the window choose how the decision was received ("At the counter", "By phone", "By email") and who approved; with used parts, also how the written consent was obtained (verbal consent is not enough). The customer signs the first estimate: if they approve by phone or email, send the "Customer link" or get their signature on the estimate. "Customer declined" uses the same window, with the customer's comment. Or create the "Customer link" (or show the QR code): the customer opens the estimate and approves it themselves. Earlier revisions are collapsed under "Earlier revisions".
4. **Parts.** "Reserve from stock" sets parts aside for this repair order. Once it is "In work", the mechanic presses "Install" and the part leaves stock.
5. **Time.** In the "Work and time" block the mechanic picks the job and records the hours.
6. **Invoice and payment.** After the quality check — "Issue invoice", then "Take payment". The invoice is official at once, with its series number (for example, F2026-000001); it can only be corrected with a corrective invoice. **Advance.** Payment can be taken before the invoice. A private customer gets an "Advance invoice" at once (VAT on the payment day), and the final invoice deducts it with an "A deducir" line. A company needs none if the final invoice is in the same month; a payment from an earlier month shows in "Paid by companies, not delivered" on the "Taxes" screen and is invoiced by the 15th. If the advance invoice was not issued at once (for example, details are missing), use the "Advance invoice" button under "Invoice and payment". A payment with an advance invoice cannot be cancelled: first issue a corrective invoice for the advance invoice. If a private customer asks for a full invoice instead of a simplified one, tick "Full invoice": the customer needs a DNI/NIE on file.

A part outside the price lists. “Find manually” next to the estimate: part, supplier, purchase and price; it is added as a line of a new estimate revision (the customer approves it) and a supplier order is created for the repair order. A special-order part is marked “no return”; the text is on the printed estimate and on the customer's link page. In the estimate editor, tick or untick it on the part line.

Common messages

- **"…no new work or parts are added to the repair order, only what the approved estimate covers"** — the customer blocked their data (GDPR): the repair order is finished per the approved estimate; a new estimate or its approval is not possible.
- **"Enter the viscosity, the ACEA / API specification, the manufacturer approval or JASO"** — in the oil search fill in at least one of the fields.
- **"Volume must be a number of litres above zero and no more than 60"** — litres as a number, e.g. 4.5.
- **"Enter the viscosity, e.g. 5W-30"** — the engine oil record needs a viscosity.
- **Parts are installed when the repair order is "In work"** — move the repair order to work first.
- **Time is recorded when the repair order is "In work" or in quality check** — the same for mechanics' hours.
- **"Release with debt"** — the vehicle leaves without full payment: the window shows the unpaid amount; press "Take payment first" or enter the reason for releasing with debt — it goes to the log. Without a reason the button stays disabled.
- **"Put the repair on hold" / "Cancel the repair order"** — pick one of the suggested reasons or write a note: without a reason the button stays disabled.

- **Used parts** — the program asks how the customer's written consent to a used or remanufactured part was obtained.

Questions and answers

How do I cancel a repair order? "More" → "Cancel the repair order" is only there in the "New" and "Accepted" statuses, and a reason is required. Once the estimate exists (status "Awaiting approval") the order cannot be cancelled: if the customer refuses, press "Customer declined" and then "Close the repair order" (or "More" → "Close without repair"). Without a recorded refusal the program replies "An order can be closed without repair only after the customer's refusal of the estimate is recorded."; cancelling or closing releases unused part reservations, and a closed repair order no longer changes. In "Diagnostics" it can be neither cancelled nor closed: first "Create estimate" (or "New revision"), then the customer's refusal and "Close the repair order". An advance already taken is not refunded automatically on cancelling or closing: refund it separately.

Why won't the repair order move to "In work"? From "Awaiting approval" it can go to "Awaiting parts" or "In work" only after the customer has approved an estimate revision; otherwise: "No estimate revision approved by the customer." Press "Customer approved" or wait for the customer's approval through the link. From "Accepted" and "Diagnostics" there is no direct move to work: the estimate comes first. From "On hold", too, only with an approved estimate.

Why can't the vehicle be handed over? If the approved estimate is not zero, the final invoice is needed first: "Issue the invoice before handing over the vehicle." (an advance invoice does not count). Debt is checked against the "Payment terms" on the customer card: by default, "Debt …: the vehicle is released after payment…"; with "With debt, only with a reason", the program asks for the reason; with deferred payment and a limit, the customer's total debt cannot exceed the limit. The terms are changed by the branch manager and finance.

Why won't the invoice be issued? "Issue invoice" is enabled in quality check and in the "Ready" and "Delivered" statuses. For example: "No approved estimate."; "A part not in the approved estimate was installed: a new revision is needed." — make a new revision and have the customer approve it; with a zero estimate, "The approved work is free of charge: no zero-amount invoice is issued and the vehicle is handed over without one."

What do I do if the estimate has expired? A revision can be approved until its "valid until …" date: in Spain, at least 12 working days (Monday to Friday), and the program sets 12 from when the revision was made. In other countries, where the law sets no period, the program also sets 12 working days. After that the program replies "The estimate has expired. Prepare a new revision.": press "New revision" and have the customer approve it again.

How do I refund a payment taken through the link with Stripe? In "Documents" open that payment → "Cancel document" with a reason: on cancellation Stripe refunds the money to the customer's card. A branch manager or Finance / accountant can do this (refund permission); if Stripe does not accept the refund, the payment is not cancelled and the program shows Stripe's answer. The whole payment is refunded (the program asks for confirmation and shows the amount); anything already refunded in the Stripe Dashboard is not refunded twice. If Stripe later fails to refund the money, the link payment block shows it in red: refund it another way (for example, from the till). The Stripe connection must be on. If the payment has an advance invoice, first issue a corrective invoice for it. If the repair order already has its final invoice, the refund goes through only if afterwards at least the invoiced amount (with corrections) stays paid; otherwise the program replies "The repair order already has its final invoice: invoiced …, only … would remain paid after the refund": first a corrective invoice for the amount refunded (otherwise the customer would keep an invoice for money returned). A double payment (more paid than invoiced) can

be refunded straight away. A part of the payment cannot be refunded this way: cancel the payment and ask the customer to pay the correct amount again.

Where next

- Customer and vehicle cards — repair history and ITV.
- "Warehouse" — stock and incoming parts on order.
- "Documents" — invoices and payments.

Tyre storage

In short

Customers' tyres in storage: finding a set, receiving it into storage, the set card with season invoices, and release.

Why it matters

- Find in seconds where a customer's tyres are by plate, name, location or receipt number.
- Release the whole set or part of it, invoice the next season and print the receipt.

Who can

Service advisor, mechanic, finance and branch manager see the storage. Service advisor and branch manager receive and release tyres.

How to do it

1. **Find tyres.** Search field: plate, customer, location or receipt number. "Including released" also shows sets already released. "Due for release by month end" shows whom to expect.
2. **Receive into storage.** "Receive tyres" → plate (if the vehicle is already in the program, the customer is filled in automatically), storage location (rack, slot), season, with or without rims, expected release date and season rate (empty: the one from the "Tyres" module settings). Add up to 8 tyres: position, brand, size, DOT, tread; "Same as the first" copies the first tyre. Then "Receive into storage".
3. **Receipt.** On the set card, "Receipt" prints the slip for the customer.
4. **Invoice and payment.** On the card: "Invoice next season" and "Pay". The season is invoiced when the tyres are received, before payment. If a private customer pays more than invoiced (the next season), an "Advance invoice" is issued at once for the difference; the next season's invoice deducts it.
5. **Release.** On the card, tick the tyres (or "Select all") → "Release tyres". A tyre the customer does not take can be marked "Dispose (with customer consent)" — a reason is required.

Common messages

- **The "Tyres" module is not enabled…** — tyres cannot be received; history is visible. An administrator enables it on the "Modules" page.
- **"Select the customer."** — the vehicle is not in the program: choose the customer manually.

Questions and answers

Can tyres be released if storage is unpaid? The program does not stop the release: it does not check the storage debt when releasing. The debt shows on the set card under "Storage invoices" ("due …"); take payment with "Pay" before releasing.

Why is there no "Invoice next season" button? It appears when the "Tyres" module is enabled, the set still has tyres in storage, the storage has a fee and you are allowed to invoice customers. Without a fee the card shows "No invoices: the storage has no fee."; the fee of a set already received cannot be changed.

Which fee applies if "Fee per season excl. tax" is empty? The one in the "Tyres" module settings: for a set with rims, "Storage fee per season with rims, €" if it is set, otherwise "Storage fee per season, €". If that is empty too, the set is received without an invoice.

Why is there no "Receipt" button, and why is the customer's phone hidden? The receipt carries the customer's tax ID, address and phone and the vehicle's VIN, so the button and the phone are only for staff allowed to view customers in that branch. The mechanic sees the location and the tyres, without contact details.

Why is a set missing from the list? By default the list shows sets that still have tyres in storage; fully released ones appear with "Including released". "Due for release by month end" shows only sets with a "Planned release" date by the end of the month (and overdue ones). A customer who had their data blocked is not found by name: search by plate, location or storage number.

Where next

- Vehicle card — history of receipts and releases.
- Customer card — invoices and debt.

Vehicle page

In short

Everything about one vehicle: make, model, year, engine, VIN, plate, next ITV inspection and owner. Tabs: "Damage", "Repairs", "Mileage", "Plates and owners". The page opens from the customer page or from a repair order; it has no menu item of its own.

Why it matters

- See the car's repair history even if the owner or the plate changed.
- Spot a wound-back odometer and damage that was there before intake.

Who can

Viewing the page: everyone working with repair orders or customers; editing details and marking damage: the service advisor, the seller and the branch manager; intake inspection damage only by staff who can see the repair order. The owner is visible only to staff allowed to view customers.

How to do it

1. **Edit details.** "Edit" → fields (VIN: 17 characters, digits and Latin letters except I, O and Q; if letters O or I were typed instead of 0 and 1, click "Replace" under the field) → "Save".
2. **Change plate or owner.** In the same window, enter the new plate or owner and "Change effective from" with the date. The previous plate and owner stay in the history.
3. **Repair history.** "Repairs" tab: repair order number, date, reason and work done, status, invoice.
4. **Mileage.** "Mileage" tab: readings from repair orders; "lower than before" marks a reading that went down.
5. **Damage.** "Damage" tab: "Mark damage" → tap the spot on the diagram. Damage from intake inspections shows here too; "Resolved" lists damage that is gone.

Common messages

- **"The mileage history has readings that went down…"** — check the odometer and the reading in the repair order.
- **"Owner hidden: no permission to view customers"** — your role does not show owner details.
- **"Customer data blocked on request"** — the customer asked to erase their data (GDPR) and their documents are kept by law: their name and phone are not shown to staff (nor in the owner history); only an administrator can open the customer card.

Questions and answers

Where does the next ITV date come from? It is entered by hand: "Edit" → "Next ITV inspection" → "Save". In the 30 days before it the label says "ITV due soon: …", and after the date "ITV overdue since …"; the same label shows on the repair order.

Can a wrong mileage reading be corrected? No: mileage is recorded at intake on the repair order and cannot be edited on the vehicle page. The wrong reading stays on the "Mileage" tab; one lower than before is marked "lower than before", and the page header shows the highest mileage recorded.

How do I delete a mistaken damage mark on the vehicle page? It cannot be deleted: only a mark

from an intake inspection that is not completed can be deleted. On a mark made on the vehicle page you can correct the note (not on a mark of a completed inspection). You can open the mark → "Damage no longer present" with the reason: it leaves the diagram and moves to "Resolved" with its photos.

What does "Another vehicle already has this VIN: check it is not a duplicate." mean? The vehicle has been saved, but the same VIN is on another vehicle page: the car may have been entered twice. Check the VIN and, if it is the same car, work with a single vehicle page.

Why doesn't "Repairs" show all repairs? It lists only the repair orders of branches where you are allowed to view repair orders. The salesperson does not have that permission: they see the vehicle page, but the tab shows "No repairs."

Where next

- Customer page — all of the customer's vehicles.
- Repair order — a new repair for this vehicle.

Warranty and claims

In short

Two tabs: **"Warranty cases"** — a customer came back with a complaint about a part or a job — and **"Supplier claims"** — a claim to the supplier for a defective part. Each step is a button for the next status.

Why it matters

- Never lose a customer complaint and bring it to a resolution: replacement, repair or refund.
- Return defective goods to the supplier or get compensation, and see where the supplier is late to reply.

Who can

Open and handle cases: service advisor, salesperson and branch manager; approve or reject warranty: the manager only. Claims are also handled by purchasing and the storekeeper; supplier returns are created by purchasing and the manager.

How to do it

1. **Open a case.** "Warranty cases" → "New warranty case" → enter the order or repair order number → "Find" → choose the part (or "Labour (no part)"), describe the problem and the mileage → "Open case". The program shows whether the warranty still applies.
2. **Diagnosis.** On the case card, "To diagnosis", and note what you found in the comment.
3. **Decision.** The manager presses "Approve" or "Reject" (a reason is required). After approval, "Resolved": choose the resolution (replacement, repair, refund, no action). Then "Close".
4. **Supplier claim from a case.** During diagnosis, "Supplier claim": choose the supplier and, if the defective part was already taken into stock with a customer return, that return. Without a return, the claim is later closed with compensation.
5. **Claim without a case.** "Supplier claims" → "New claim": supplier, part, quantity and reason.
6. **Progress.** "Sent" (the supplier's RMA number and reply deadline) → "Under review" → "Approved" or "Rejected". After approval, "Create supplier return" (the part leaves stock) or "Close:

compensation" if the goods are not returned.

Common messages

- **"out of warranty"** — the period or mileage has run out; the case can still be opened, the manager decides.
- **"answer overdue"** — the supplier has not answered by the date given: remind them.
- **"Without returning the defect, the claim is closed with a note of the supplier's compensation…"** — the part stays with the customer; nothing leaves stock.

Questions and answers

How does the program calculate the warranty period? For a part: from the first delivery on the order or the fitting on the repair order, for the months set on the product card ("Warranty"); if none are set, 3 years. For labour on a repair order: from the vehicle's handover, 3 months or 2,000 km from the intake mileage (without an intake mileage, only the 3 months count). Outside the period or mileage the case still opens, marked "out of warranty".

Why won't a warranty case open? For example, the part on that order has not been handed to the customer yet: "The goods of this document have not been delivered yet: there is no warranty yet."; for labour, "The vehicle has not been handed over yet: there is no labour warranty yet." With "Labour (no part)" the mileage is required: "Enter the mileage: labour warranty is 3 months or 2,000 km." "Open case" stays disabled until the order is found, the part is chosen and the problem is described.

Why is there no "Supplier claim" button? It appears only on a case in "diagnosis" and only for a part: not with "Labour (no part)". You need rights to both warranty cases and supplier claims (the service advisor, the salesperson and the branch manager). Once the supplier claim is created, the case moves to "at supplier" and the button disappears.

Does the program refund the money or replace the part when the case is "Resolved"? No. The resolution (replacement, repair, refund or no action) is only recorded in the case. The refund, replacement or repair is entered separately with the usual documents, for example a return on the customer order.

Why is there no "Create supplier return" button? It appears on an approved claim if the defect was taken into stock with a customer return, and only for the purchaser and the branch manager. If the part is still with the customer, there is "Close: compensation" instead: note how the supplier compensated the defect (credit, replacement); nothing leaves stock.

Where next

- "Documents" — customer return and supplier return.
- Repair order or sale card — where the part came from.

Workshop bookings

In short

The workshop calendar: the week, "On the bays now" and the day timeline by bay (lifts, wheel alignment, tyre fitting). Each booking is a customer's vehicle on a bay at a time.

Why it matters

- Book customers so bays are neither idle nor double-booked.
- See who is on which bay right now and which bay is free.

Who can

Viewing the calendar: the view bookings permission; booking and moving: the edit permission (reception, managers). Setting up bays and hours: the branch manager. No button means no permission.

How to do it

1. **Book a customer.** Click a free slot on the day timeline (or "New booking") → customer and vehicle, job, bay and time → save.
2. **Move a booking.** Drag it to another time or bay.
3. **Change day.** "Today", previous and next day, week.
4. **Set up bays.** "Bays and opening hours" — add the branch's bays and opening hours; bookings only go into working hours. The "Board: thresholds" tab sets when a vehicle on the "Repair orders" board turns orange or red.
5. **The customer has arrived.** Open the booking → "Arrived" → "Open repair order": the repair order opens for that vehicle, linked to the booking. The mechanic starts with "Start work".
6. **Find a slot.** "Find a slot" → jobs from the catalogue, mechanic (or "Anyone free") and when suits the customer → "Find". The duration comes from the jobs' standard times; only bays that do those jobs and hours when the mechanic is at work are offered. Clicking an option opens a new booking with bay, time and jobs filled in.
7. **Jobs per bay and mechanics' schedules.** In "Bays and opening hours", set "Which jobs are done here" for each bay (empty means any). The "Mechanics" tab holds each mechanic's custom weekly schedule and absences (holiday, sick leave, day off); it is the schedule for bookings, not the record of working hours (registro de jornada). A manual booking on another bay or time can still be saved, with a warning.

Common messages

- **"This branch has no bays yet"** — press "Add bays": lifts, wheel alignment, tyre fitting.
- A time cannot be booked — the bay is taken or the time is outside the branch's opening hours.
- **"No bay does all the selected jobs"** — check "Which jobs are done here" on the bays.
- **"No free time in the next two weeks"** — choose another mechanic or another preference.

Questions and answers

Why is there no "New booking" button? Booking, moving and cancelling are done by the service advisor and the branch manager. The mechanic sees the calendar and marks "Start work" and "Done" in

the booking. The button is also missing while the branch has no bays: the branch manager adds them with "Add bays".

Can I book a customer who is not in the program? Yes: a plate or a name is enough for a booking; a phone can be added, but a phone alone is not accepted. But "Open repair order" from the booking is available only with a registered customer and a registered vehicle; the vehicle is filled in automatically if its plate is already in the program. Otherwise the booking shows "A registered customer and vehicle are required."

What do I do if the customer does not turn up? Once the start time has passed, open the booking → "No-show": the bay is freed and the booking stays in the history. Before the booking starts this cannot be marked. If the customer turns up while the booking time is not over, use "Restore booking"; if it is over, make a new booking.

How do I cancel a booking, and can I restore it? Open the booking → "Cancel" → reason → "Cancel appointment": the bay slot is freed and the booking stays in the history as cancelled. A booking that is "In progress" has no such button. A cancelled booking is brought back with "Restore booking" while its time has not passed and the bay is still free at that time.

Why does "Start work" not work? The booking has no mechanic: choose one in the "Mechanic" field; until then the booking says "Choose a mechanic to start work." If other work is already in progress on that bay, the program replies "Work is already in progress on this bay: … Finish or move it first."

Where next

- "Workshop" — vehicles in progress and intake.
- Customer card — their vehicles and visit history.

Workshop: vehicles in progress

In short

The repair order board: every vehicle in the workshop is a card in the column of its stage: "Checked in", "Waiting for approval", "Parts / on hold", "In work", "Ready for pickup". A card shows the repair order number, plate, vehicle, customer, reason for visit, how many days the car has been with you and **what is holding it**: no estimate yet, the customer has not replied, which part is missing, which mechanic is on it and whether they are within the estimated time, whether the customer has been notified that the car is ready. Vehicles that need you to step in have a red or orange stripe on the left and come first in their column.

Why it matters

- See the whole workshop at once: what waits for the customer, what waits for parts, what can be handed over — and why each car is waiting.
- At the top: how many vehicles need attention, how many booked arrivals are due, how many to hand over today and how many are ready but unpaid.
- Check in a new vehicle quickly and open its repair order straight away.

Who can

Checking in vehicles and running repair orders: the service advisor and the branch manager. Mechanics see repair orders, record their time and install parts; on the board they see what is holding each car, but no amounts, names or customer buttons. Amounts are shown to staff who can see customer invoices. The "Remind on WhatsApp" and "Notify customer" buttons are for staff who can see customer data and manage the customer link. The branch manager changes the board thresholds. No "New vehicle intake" button means no permission: ask your administrator.

How to do it

1. **Check in a vehicle.** "New vehicle intake" → plate (if plate lookup is connected, "Find" and then "Accept data") → customer (pick one or type a new one) → mileage and reason for visit → "Receive vehicle". The repair order opens straight away.
2. **Find a repair order.** Search box: repair order number, plate or customer name.
3. **Open a vehicle.** Click the card — the repair order opens: inspection, estimate, parts, labour, invoice.
4. **See delivered and closed ones.** The "All" switch shows every repair order, including delivered ones.
5. **Filter.** Tap a counter at the top: "Need attention" — red and orange only, "Booked arrivals" — today's bookings without a repair order, "Hand over today" — ready vehicles, "Ready, unpaid" — ready with money owed. Tap it again to clear the filter. The "All mechanics" field keeps one mechanic's vehicles.
6. **Remind the customer about the estimate.** On an estimate with no reply: "Remind on WhatsApp". The chat opens with a ready text and the customer link (in your country's document language). If there is no link yet, the program creates one.
7. **Notify the customer that the car is ready.** On a ready vehicle: "Notify customer". WhatsApp opens with a ready text and the program records who notified the customer and when. Called them

instead? "…" → "Notified by phone". The orange "Customer not notified" mark goes away.

8. **On a phone.** Instead of five columns, a switch at the top with the number of vehicles; "Attention" opens first — red and orange only.

Common messages

- **"You can only send a reminder about an estimate that is waiting for the customer's reply."** — the customer has already replied or there is no current estimate: refresh the board.
- **"The customer has no phone number for WhatsApp."** — add the phone on the customer card or tell them another way.
- **"You can only notify the customer when the vehicle is ready."** — the vehicle is no longer "Ready": refresh the board.
- **"No cars in the workshop"** — the board shows only open repair orders; delivered ones are under "All".
- **"Showing the latest 300; refine the search."** — "All" lists only the latest; use the search box.
- **"No data found: enter it manually."** at intake — nothing is known for that plate: check the vehicle in by plate and add make and model later on the vehicle card.
- **"The plate lookup limit … is used up"** — the employee has used up the paid lookups for the day (30): enter make and model by hand; plates already found still come from the cache.

Questions and answers

Where are repair orders on hold or in quality check on the board? "On hold" is in the "Parts / on hold" column, with a yellow mark and the reason, "Quality check" in "In work", and "New", "Accepted" and "Diagnostics" in "Checked in". Delivered, closed and cancelled ones are not on the board: they are under "All". Each column shows red first, then orange, then the rest; within each, the vehicles that have waited longest come first.

Why is a card red or orange? The reason is in the line under the vehicle, in the same colour. By default: no estimate for 4 working hours — orange, since yesterday — red; an estimate with no reply for 24 hours — orange; the estimate expires tomorrow or has expired — red; the expected part date has passed — red; mechanics' time is more than 30 % over the estimate — orange; ready but the customer has not been notified, or ready for 2 days — orange.

Where do I change the board thresholds? "Bookings" → "Bays and opening hours" → the "Board: thresholds" tab. Each branch has its own; "Restore defaults" goes back to 24 hours, 2 days and 30 %.

The car has been here before: do I enter it again? No. If the plate in "New vehicle intake" matches a vehicle in the program (spaces, hyphens and dots do not matter), the repair order opens for that vehicle and, with no customer chosen, for its owner on the vehicle page. Choosing another customer does not change the owner on the vehicle page: do that on the vehicle page → "Edit".

Why does "Receive vehicle" not work? The plate and the reason for visit are required. The customer can be one you pick, a new one ("…or a new customer") or the owner of a known vehicle; otherwise the program replies "Select or enter a customer."

Why is the customer's name missing on the card, and why does a name search find nothing? Customer names and searching by them are only for staff allowed to view customers; the mechanic is not. A customer who had their data blocked on request is not shown or found by name: search by repair order number or plate.

What does the "TV board" show? The board for the workshop TV: it opens in a new tab, which you

switch to full screen. It shows the branch's vehicles by stage — plate, make and days in the workshop — without customer names, reasons for visit or mileage, because visitors can see the screen.

Where next

- Repair order → intake inspection, customer estimate, parts and mechanics' time.
- "Bookings" — vehicles due to arrive, by bay and time.
- "Customers" — the customer card, their vehicles and repair history.

Sales

Channel orders

In short

How the channel's customer sends orders: as a file (CSV or XLSX) right here, into the orders folder of their "Own FTP", from their server on a schedule, or via API from their website. Below — received files and orders with the result for each line.

Why it matters

- Turn the customer's order file into a customer order with a reservation, without typing.
- Receive orders from the customer's website or their own Engrana automatically.
- See what was accepted, what was short and why a line was not accepted.

Who can

A manager with the sales channels permission and the administrator. Orders from files and the API are placed by the system channel bot.

How to do it

1. **Receive an order file.** "Upload order file": a header row and rows "brand, part number, quantity". The customer's order number comes from a file column or the field; each number is accepted once.
2. **Order settings.** What to do if there is less in stock than ordered, the customer manager and the column names in the customer's file (empty — the common ones are recognised, such as Brand / Marca, Reference / Referencia, Qty / Cantidad).
3. **Buyer columns** — if the channel places orders for the end buyer: they are used to find or create the buyer's card.
4. **From the customer's server.** "Pick up orders from the customer's server": server, folder, access, file name mask and how often to check. "Fetch now" — do not wait for the schedule.
5. **Via API.** "Enable" — the program issues a key for the website; below is a sample request body. A customer with their own Engrana connects you as the "Engrana" supplier using this installation's address and this key.

Common messages

- **"short: N"** — this many lines were not fully accepted: the channel's warehouses did not have enough.
- **"Order not created: no line was accepted"** — check the brands and part numbers in the file.
- **"waiting: will be created on the next import"** — no stock now; the order will be created later.
- **"The channel is disabled…"** — enable the channel in "Marketplaces and sales channels".

Questions and answers

Can I upload a file with the same order number again? If an order has already been created under that number, no: "Customer order No. … for this channel has already been received and is not accepted

again.". If the previous file did not create an order (no line was accepted), a corrected file with the same number is accepted.

At what price is the order from the file created? The price in the file is not read: the price is the one in the channel price list. If there is free stock — the price of our own stock; if not and the channel exports "on order" — based on the cheapest supplier offer. For an order via the API from your own website, it is the website price the buyer paid; without a price — also by the channel policy.

What happens if there is less in stock than ordered? As chosen in "If there is less in stock than ordered": with "reserve what is available and mark the line" (the default) the line goes into the order in full, what is available is reserved and the line result is "shortage: less reserved"; with "the line is not accepted" that line will not be in the order.

Why was a line not accepted? The reason is in the line result: "product not found", "several products with this part number: specify the brand", "no price under the channel policy", "price below the minimum: the product is not in the channel price list", "brand blocked: not for sale", "invalid quantity" or "not accepted: not enough stock" (with "the line is not accepted").

Are order files deleted from the customer's server? No: the files stay on the customer's server; the program remembers the ones it has already picked up (name, size and modification time) and does not take them again. A file the customer has changed is picked up as a new one.

Where next

- "Orders" — the channel orders created: picking, shipping, invoices.
- "Channel price list" — what the customer sees in the price list.

Channel price list

In short

Price list exports for the channel's customer: which products and prices go into the file, which columns and in what format, when and where the file is sent — by email, to the customer's server (FTP, FTPS, SFTP), via a permanent link or to the installation's "Own FTP". Below — the send log.

Why it matters

- Give the customer fresh prices and stock regularly, without manual work.
- Fit the file to the customer's software: their own columns, separator and number format.
- See what was sent and when, and spot sharp price jumps in time.

Who can

A manager with the sales channels permission and the administrator.

How to do it

1. **New export.** Name, file format, separator and whether the first row holds headers.
2. **What goes into the price list.** Brands and suppliers in the customer profile ("All", "Only these", "All except these"; brands can be loaded from a file), safety stock, "Show at most, pcs", "Skip if fewer than, pcs" and "on request" items with quantity 0.
3. **Columns.** "Start from a template" or "Add column": header, what the column holds or a fixed value,

and format (decimals, decimal separator, truncation, "If empty", UPPERCASE). "How the file will look" shows the first rows.

4. **Where to send.** Email (a ZIP attachment; over 10 MB — a link valid for 7 days), FTP / FTPS, SFTP, link or "Own FTP". "Check the connection" before saving.
5. **When.** Manually only, at set times or every N hours (Madrid time). To the customer's server you can send only the changes between full files.
6. **Send now** or **Download file** to check it by hand.

Common messages

- **"Check prices"** — the price changed by more than 20 % in many rows; the price list is sent anyway.
- **"Email is not configured…"** — you cannot send by email: contact the installation administrator.
- **"The connection did not pass the check"** — check the server, port, user and password, or save without checking.
- **"Server key…"** — it is remembered on the first send; if the server changes its key, sending stops: "Reset" and enter the password again.
- **"No rows…"** — check stock, quantity rules and channel prices.

Questions and answers

Will the customer see our purchase price or the supplier in the price list? No. Columns can only hold our own data: brand, part number, name, EAN, price with and without tax, quantity, lead time, availability and so on; purchase price and supplier are not among them. Suppliers in the customer profile only limit which on-order products go into the file.

Why is a product missing from the price list although it is in stock? For example: the warehouse is not one of the channel's warehouses, all the stock is reserved, the brand is not in the customer profile, after the safety stock fewer units remain than "Skip if fewer than, pcs", the product has no channel price, or the price is below the minimum allowed by the markup rule. How many rows were skipped because of quantity and price is shown in "How the file will look".

The customer downloads the price list by link, but the prices are old — why? The file behind the link is only updated when the export is sent — with "Send now" or on schedule; the link does not build the file by itself. When the file was updated and how many times it was downloaded is shown under the link.

How do I cut off access through an old link? "New link" — the previous one stops working at once; give the new link to the recipient.

What happens if the customer's server did not respond during a scheduled send? If nothing went out, the send is retried automatically up to two more times — after 5 minutes, then after another 10. If the file already reached at least one recipient, or the cause is in the settings (for example, the password, folder or server key), there is no retry: the cause is in the "Deliveries" block.

Where next

- "Marketplaces and sales channels" — the channel's settings, prices and warehouses.
- "Channel orders" — receiving orders against this price list.

Customer card

In short

Everything about the customer: contacts, their vehicles, repairs, purchases, debt or credit, payment terms, price policy and sales channels. For a supplier, direct supply is here too.

The header holds the general data (name, legal form, tax number, address), debt or credit, contact buttons ("Call", WhatsApp, "Email") and quick actions by role; less frequent ones are under "More". On the right: vehicles, totals, note, consents and payment terms. Below are tabs by role: "As customer" (our terms for them, history), "As supplier" (their terms for us, bank accounts, direct supply), "Account" (balance, documents for a period, statement) and "Contacts and addresses". A counterparty with both roles shows both tabs, so the terms never get mixed up.

Why it matters

- See the customer's history: when they came, what was repaired, what they bought and what they owe.
- Set special terms: payment term and debt limit, their own price policy (for example, trade prices for another workshop).
- Handle the customer's GDPR requests: export or erase their data.

Who can

Viewing: the view counterparties permission; editing: the edit permission. Payment terms are changed by a manager or finance; the price policy by whoever has the markups permission. GDPR export: the administrator and the branch manager; erasure: the administrator only. No button means no permission.

How to do it

1. **Change details.** "More" → "Edit" → correct contacts, address or country → "Save".
2. **See the history.** "Repairs" and "Purchases" tabs. On the right: the customer's vehicles, visits, last visit, invoices issued, what the customer owes and their credit.
3. **Payment terms.** In "Payment terms" press "Edit" and choose: "No deferral" (the default: a vehicle or goods are not released with debt), "Debt with reason" or "Deferred payment", with a payment term in days and a debt limit.
4. **Price policy.** In "Customer price policy" choose a policy — this customer's price in estimates, at the counter and in orders is calculated with it. "Standard prices (retail)" — the same as everyone.
5. **Sales channels.** Sending the price list to the customer (file, FTP, link) and receiving their orders live under "Sales channels". The customer server (FTP, FTPS, SFTP) in "Channel price list" has "Check the connection": it logs in and lists the folder without writing anything; saving a changed server runs the check by itself and, if it fails, shows the reason and "Save without checking". If you change the server or turn FTPS off, enter the password again.
6. **GDPR.** Under "More": "Export data (GDPR)" — an archive with all the customer's data to answer their request. "Erase data (GDPR)" — the data is anonymised or blocked for the period the law requires.
7. **A company from another EU country.** In "Tax number" enter its VAT ID (for example PL5260001246) and its own country. On saving, the number is checked in VIES: below it you see "VIES: number valid" or "not valid". "Check in VIES" checks it right away. A full invoice is issued

only to a valid number. In a customer order, goods are sold to this company without VAT (0 %, intra-EU supply, art. 25 LIVA): prices without tax and the exemption note on the invoice. Repairs and tyre storage for this company are also without VAT: the service is taxed in its country and the company accounts for the tax itself (art. 69 LIVA, the invoice says "Inversión del sujeto pasivo"); the estimate shows VAT, the invoice does not. At the counter (goods are collected here) and in sales-channel orders VAT applies as before. For a company outside the EU (with its own country's tax number; for services Northern Ireland counts as the United Kingdom) repairs and tyre storage are also without VAT (art. 69 LIVA).

8. **Legal form and full legal name.** In "Edit", "Legal form" from the list of the customer's country (S.L., GmbH, sp. z o.o.…): it sets the type (private person or organisation) and the tax status by itself. For a company, "Full legal name" for documents (lists keep the short name) and, if the form requires it, "Registration number".
9. **Supplier's terms for us.** For a supplier, "Edit" → "Supplier's terms for us": payment term (the due date of their invoice is set automatically), their credit limit (the supplier order warns when the debt nears the limit), default payment method, settlement currency (for reference), orders email (the order is sent there) and accounting email.
10. **Supplier bank accounts.** "Bank accounts" block → "Add account": IBAN (checked), BIC, bank, holder, currency, "Main". A new or changed account is "not confirmed": a transfer to it can be posted after a manager or finance presses "Confirm", not the person who entered it. Check a new account with the supplier on a known phone number: "we have a new account" emails are a common fraud. A Polish account of a supplier with a NIP is checked on the biała lista podatników VAT (automatically in the payment window; in the card, "Check on the biała lista"): if it is not listed, a payment of 15,000 zł or more loses the expense deduction.
11. **Contacts.** "Contacts and addresses" tab → "Add contact": name, position, phones, email, language and "Used for" (our orders, orders to us, invoices and reconciliation, payment reminders, claims). Supplier orders go to the "Our orders" contact; the order and invoice show the supplier's manager with a phone number. If the person leaves, turn off "Active": such a contact is deleted automatically after the retention period.

1. **Account and statement.** The “Account” tab (with access to customer invoices or supplier invoices): a “From — To” period (the year to date by default); the company is the current one. Opening balance, documents by day with links (“Owed to us +”: invoice, opening debt; “Paid −”: payment, return), the balance after each line, the closing balance and “Overdue”: unpaid documents with due date and days late. A party that is both customer and supplier gets two sections and a total “owed to us / we owe”; the program does not offset them by itself. The balance matches “Customer debt” and “Supplier debts”. “Statement (PDF)” is in the country's document language with room for signatures; “XLSX” is the statement as a table; “Send statement” emails the “Invoices and reconciliation” contact (or the card email), and replies go to the company email. Record the reply with “Record reply”: “Confirmed” or “Differences” with a comment. In Spain it also shows whether the party goes into form 347 for the year.

1. **Addresses.** The “Contacts and addresses” tab → “Add address”: type (delivery, billing, other), name (“Elche workshop”), address, postcode, city, province, country, the recipient and phone on site. “Default”: one address per type. The registered address is the card's own (“Edit”): it is the one the invoice prints. An address no longer used is switched off (“In use”): there is no delete, documents that already carry it do not change, and the address is erased when the retention period ends. Many addresses at once: “Go-live: initial data”, step 7 “Customer addresses” (by customer code or tax number).

1. **Customer source.** For a new customer (in a request, vehicle intake, order, counter sale and "New customer") — "Customer source": how they found you. Missing one — "+ New source" right in the field. "Referral" requires "Referred by": an employee, another customer or a partner (a taxi fleet, a driving school — "+ New partner"); for other sources use the "+ Referred by" button. Each organisation has its own list. Later the source is shown in the customer card and in the request — "Set" or "Change"; a change goes to the activity log with the previous value. Report — "Finance" → "Customers by source" (reports permission): by source and by referrer — new customers, how many bought, requests, repair orders, orders, revenue, cost and gross profit for the period, XLSX; a short block is shown under the P&L. There too: "Sources of existing customers" — upload by file (by code from the previous program or tax ID) and "Source list" (rename, "Referrer required", deactivate).

1. **Note and consents.** On the right — "Note" (for example: "prefers WhatsApp, call after 17:00"): staff with access to the card can see it; the customer does not, but it is included in their data export on request (GDPR). "Consents" — per organisation: "ITV, servicing and maintenance reminders" and "Advertising and offers" — yes (with channels), no or "not asked"; "Edit" → "Agrees" (receipt signature with a document number, or verbal; allowed channels) or "Declines". If the customer replies "BAJA", press "Opted out of reminders and offers". Consent from the website (the "I want to receive offers by email" box in an order by a signed-in company) is recorded automatically (email only). Messages about a repair, order or booking in progress are always sent, without consent.

1. **Quick actions.** The header has what is done most often with this customer or supplier, already filled in: for a customer — "New vehicle intake", "Book service" (the booking opens for this customer), "Sale" (counter with this buyer) and "Order"; for a supplier — "Supplier order", "Supplier invoice", "Supplier payment" and "Return to supplier". A button shows if you have the permission and the module is licensed. Blocked, anonymised or switched-off customers and suppliers get no new documents, so no buttons. A return to the supplier does not replace their corrective invoice: VAT is adjusted by it. Debt or credit in the header is shown per organisation; "customer since" is the date of the first document in your branches. On a phone there are three large buttons (customer: call, WhatsApp, intake; supplier: call, email, order); the rest are under "More". WhatsApp opens a chat with the customer's number: a local number gets the customer's country code (no country — the organisation's); for a country the program has no rules for, the number needs a "+".

1. **List.** "Sales" menu → "Customers & suppliers": search by name, tax number, phone, email or plate and the "All · Customers · Suppliers · Carriers" filter.

1. **"Now" and history.** Above the tabs, "Now": for a customer — repair orders in progress, open orders, the next booking and an upcoming ITV; for a supplier — orders we are waiting for, invoices to pay (overdue in red) and open claims. Below, "History": documents, bookings and messages to the customer by date; chips filter by type and "Show more" adds entries. You only see what is in your branches and allowed by your permissions. "Send ITV reminder on WhatsApp" works only with the customer's consent to WhatsApp reminders from your organisation: the text is ready (with the workshop name and "BAJA" to opt out) and the action is kept in the history and the log.

Suggestions while typing. In the address (street, postcode, city), the contact's position, the vehicle make and model, the carrier and the reason for visit, values already in the database appear from the first letters, frequent ones first, ignoring case and accents (“mala” → “Málaga”). With a full postcode and an empty city, the city fills in by itself. Names, phones, emails and house numbers from other cards are never suggested.

Common messages

- **«No email: add an “Invoices and reconciliation” contact or enter an address.»** — add a contact with the “Invoices and reconciliation” use on the “Contacts and addresses” tab, or type the address when sending.
- **«Describe the differences in the comment.»** — when marking “Differences”, write what the other party disagrees with.
- **«You may not see the account with this party in the company.»** — you need access to customer invoices or supplier invoices in this company.
- **«The statement period is three years at most.»** — choose a shorter period: three years at most.
- **«The statement needs invoice rights across the whole company: with only some branches the balance is incomplete.»** — you have rights in some branches only; someone with company-wide rights sends the statement.
- **Data blocked at the customer's request until a date** — only the administrator sees the card and no new documents are issued; after that date the data is anonymised automatically.
- **Customer data anonymised** — only amounts and documents without a name remain.
- **"According to VIES, the buyer's VAT number … is not valid"** — check the number with the customer; no full invoice is issued to it.
- **"VIES is not responding…"** — the European Commission service is temporarily down; try again later. If the number was checked successfully in the last 30 days, the invoice is issued anyway (except a company with blocked data: its number is checked for every invoice).

Questions and answers

What happens if a customer with deferred payment exceeds the debt limit? The release does not go through: "The customer's debt would be …, above the limit …". The customer's whole debt in the organisation after the release is compared; if no limit is set, the deferral has no amount cap. Counter sales are paid on the spot and are not checked.

What does "Debt with reason" mean? The vehicle or goods can be handed over with debt, but the program asks for the reason: "Debt …: give the reason for releasing with debt.". The reason is logged together with the debt amount.

Why can't I change the customer's details? If the data is blocked or anonymised at the customer's request, the "More" has no "Edit" item: it cannot be changed. If the item is missing for an ordinary customer, you do not have the permission to edit counterparties.

Can the same counterparty be both a customer and a supplier? Yes: "Edit" → turn on "Supplier" → "Save". The "As supplier" tab appears with their terms for us; our terms for them stay in the "As customer" tab. For a transport supplier also turn on "Transport": its contracts, zones, rates and surcharges are in "Logistics" → "Delivery", and the "Carrier contracts" link is in the "As supplier" tab.

Why can't I turn on "We withhold IRPF"? This supplier mark is changed by accounting — it needs the "export.gestor" permission (finance, the administrator); for everyone else the switch is disabled. The mark affects modelo 347 and modelos 180/190.

Where next

- Vehicle card — repairs of that car, ITV and damage from inspections.
- "Workshop" → "New vehicle intake" for this customer.

Customer orders

In short

All the company's customer orders in one list: counter orders, manual ones, orders by customer file or FTP, from the online shop and marketplaces (Allegro). At the top is the "Awaiting decision" queue: orders that arrived but were not created.

Why it matters

- See what is waiting for handover and payment, what is short in the reservation and which orders are stuck.
- Run an order through your own statuses (for example "Packed", "Shipped") and change the status of many at once.

Who can

Viewing orders: anyone with the customer orders permission; creating and changing statuses: sales and managers. Handover and payment need the cash permission. No button means no permission.

How to do it

1. **New order.** "New order" → customer → items → create. Anything not in stock shows up in "What to order" under "Purchases". Oil: "Find oil" by viscosity, specification and litres; the set of cans goes in as order lines.
2. **Clear "Awaiting decision".** Each line gives a reason: item not matched, no exchange rate, etc. Fix it (pick the product card for each line) → "Create order". Not needed? Remove it from the queue. "Website payment needs a decision" — the buyer paid after the order was cancelled, paid twice, or the order total changed: create the order again and link the payment (if the goods are available), refund the money with a "Customer return" through the marketplace or collect the difference, then "Resolved" with a note. "Unrecorded Stripe payments" — Stripe took the money but the program did not record it (e.g. the channel has no marketplace account): fix it and "Process again", or "Resolved". A branch manager sees here only the Stripe refunds that failed on documents of their branches: refund the customer another way (e.g. from the till); "Resolved" is marked by someone who may process orders for the whole company.
3. **Find an order.** Filters: source, status, handover, payment, reservation shortage, dates, "My channels".
4. **Hand over and take payment.** Open the order → "Order actions" → "Hand over" or "Take payment": you can hand over part and take part of the payment. Allegro order: the issued invoice is sent to the Allegro order on the next order load (the buyer sees it in their order). Online store order: the issued invoice is e-mailed to the buyer (PDF) and appears on the order page. Return of an Allegro order "through the marketplace": on the return, "Refund through Allegro". The program shows which lines and delivery Allegro will refund and the approximate amount; once you confirm, the money goes to the buyer right away. The status ("Allegro is refunding", "money refunded") is updated on order load. If the buyer filed a return on Allegro, the order shows what they return, why, and the parcel number. Once the money is refunded, the Allegro commission refund claim is filed automatically; its status appears on the return. Buyer messages and Allegro disputes: Allegro channel → "Messages and disputes": conversations (with order number and VIN, if the buyer gave it) and disputes / claims with a reply deadline. The program reads them from Allegro and does not

store them; a staff member writes the reply. Accepting or rejecting a claim is done in the Allegro account.

5. **Your own statuses.** "Statuses" tab: create statuses and groups for your process; in the list tick orders, pick the new status → "Change status".
6. **Many orders at once.** Tick orders in the list:

- **"Pick list"** — what to pick and from which warehouse, what is missing in the reserve and for which orders; "Print".
- **"Hand over"** — orders with everything outstanding in reserve are issued in full; one carrier, a tracking number per order (for a marketplace order it goes to the marketplace). What was not issued is listed with the reason: issue part of it from the order card or take the payment.
- **"Invoices"** — each order gets an invoice for what was issued and not yet invoiced.

1. **Automation.** "Automation" tab → "New rule": an event ("order received", "paid", "status set", "custom button"), conditions (source, country, amount, payment, everything reserved) and actions (change status, issue in full, invoice). A rule runs within a minute after the event, on behalf of whoever saved it; what ran and what did not is in the "Run log". A custom button appears in the selected orders bar.
2. **Where the order came from.** "Sources" tab: "Phone", "In store", "WhatsApp", "Email" and your own. In "New order" — "Where the order came from": the source shows in the list and can be used as a filter and a rule condition. Not listed — "+ New source" right in the order window (manager); without the right, ask a manager.

Common messages

- **Order not created yet** — the reason is on the queue line; after fixing it, "Create order".
- **"Reservation shortage"** — there is less stock than ordered: wait for the receipt or order from a supplier.
- **No orders** — clear the filters if you are looking for a specific order.

Questions and answers

Why don't I see the "Statuses", "Sources" and "Automation" tabs? Only whoever sets up the organisation's orders sees them: a branch manager with a role for the whole organisation and the administrator. The salesperson changes the status of orders; the storekeeper only of orders in the "In work" and "Sent" groups.

How do I delete my own status? Only a status that no order has can be deleted; otherwise the program replies "Orders have this status: it cannot be deleted, but it can be disabled.". At least one active status must remain in the "New" group — new orders get it.

On whose behalf does an automation rule run? On behalf of the employee who last saved the rule, and with their permissions in the order's branch. If they lack a permission, the action is not carried out (for example, "The rule's author has no permission to issue this order."); the first failed action stops the rule, and the reason is in the "Run log".

Does "Order paid" fire on a partial payment? No: only when the order is paid in full. "Order received" and "Order paid" fire once per order; a rule cannot set the same status it is triggered by.

How many orders can be processed at once? "Change status" — up to 500 orders, "Pick list" — up to 200, "Hand over", "Invoices" and a "Custom button" rule — up to 100. With more, the program replies

"No more than … orders at a time.".

Where next

- "Purchases" → "What to order" — parts for customer orders.
- Customer card → "Sales channels" — where file or FTP orders come from.

Customers

In short

The list of customers and suppliers: individuals and companies. Search finds a customer by name, tax number, phone, email or the plate of their vehicle.

Why it matters

- Find the customer quickly when they call or walk in.
- Add a new customer before a vehicle intake or a sale.

Who can

Viewing customers: anyone allowed to view counterparties (reception, sales, managers). Adding and editing: the edit counterparties permission. No "New customer" button means no permission: ask your administrator.

How to do it

1. **Find a customer.** Start typing a name, NIF/CIF, phone, email or plate — the list narrows at once.
2. **Add a customer.** "New customer" → individual or company → name, tax number, contacts, address and country → "Save".
3. **Open the card.** Click the customer — their vehicles, repairs, purchases and balances open.
4. **Fill in by number.** In a company's form, type the tax number → "Fill in by number": a Polish NIP — from the biała lista (name, address, KRS, VAT status; for a supplier, their accounts: tick which to add), the VAT number of a company from another EU country — from VIES (name and address if the country provides them; Germany and Spain do not), a Spanish NIF — only the number check. Empty fields are filled at once; what was typed by hand only on "Replace". Private individuals are not looked up in registers. A Polish NIP without "PL" — choose the country "Poland" first. Added accounts, as always, wait for confirmation by a second person and are checked on the biała lista right away.
5. **Add a customer without leaving the window.** In an order, a service invoice, the counter, an appointment, vehicle intake and tyre storage, if the customer is not in the "Customer" field: "+ New customer “what you typed”" in the list or the "+" button next to the field. The form opens on top of the window with what you typed (name, phone or tax number) already filled in; after "Save" the customer is selected. If a customer with the same phone or tax number already exists, the program offers "Select it"; for the same phone also "It's a different customer: create". A supplier is added the same way in goods receipt and purchasing.

Common messages

- **"Nothing found."** — check the spelling; plates can be typed without spaces or dashes.
- **"The daily limit of biała lista queries is used up…"** — the Polish register has a daily limit; on the same day the answer comes from memory, a new number — tomorrow or by hand.
- **"Fill in by number works for Poland…"** — other countries have no open source; fill in by hand.
- A customer who existed is gone — their data may have been anonymised by the retention period or at their request (GDPR).
- **"This contact is not marked as a supplier…"** — while adding a supplier from purchasing, a contact with the same phone or tax number was found, but without the "Supplier" mark: open their card, turn on "Supplier" and select them.

Questions and answers

Can I find a customer by VIN or by phone without the country code? Yes. The search also looks at the VIN of their vehicles (part of the number is enough) and at the phone by its digits; spaces do not matter. Type the number without "+34" and at least 4 digits: numbers stored with and without the country code are found.

Why is a customer missing from the list? For example: "Active" is off in their card — such a customer disappears from the list, the search and the customer picker in documents. Turn on "Show deactivated" above the list: the customer shows up marked "inactive"; to bring them back, card → "Edit" → "Active" → "Save". Or their data is blocked at their request — then only the administrator sees them, also with "Show deactivated".

Why won't a customer with a tax ID save? For example, another active customer already has that number: "A customer with tax ID … already exists: “…”." — find them and work with them. Duplicates are checked only among active customers: with the number of a deactivated customer the new one is saved. A Spanish number with a typo is not saved either: "… does not look like a NIF, NIE or CIF…" or "The check character of NIF … does not match…".

Can I add a customer without a tax ID? Yes: only the name or company name is required. The tax ID is needed for a full invoice, and for a private individual the DNI/NIE if they ask for a full invoice instead of a receipt.

How do I delete a customer? There is no ordinary deletion: turn the customer off with "Edit" → "Active" → "Save". A deactivated customer disappears from the list, the search and the customer picker in documents. To find them, turn on "Show deactivated" above the list (they are marked "inactive"); to bring them back, open their card → "Edit" → "Active" → "Save". If the customer has sales channels, turn them off first: the channels of a deactivated customer keep working but cannot be changed ("The customer is inactive or their data is blocked."). Erasing the data at the customer's request (GDPR) can only be done by the administrator in the customer card.

Where next

- Customer card — vehicles, repairs, purchases, payment terms and sales channels.
- "Workshop" → "New vehicle intake" — the customer can also be picked or added during intake.

Marketplace settlements

In short

Marketplace payouts (for example, Allegro) for sold orders: how much reached the bank, what was withheld (commission, shipping, refunds) and which orders the payout settles. At the top — how much the marketplace owes us or we owe it.

Why it matters

- Settle order payments received through the marketplace and reconcile them with the bank.
- Record the marketplace commission: deductions go to expenses by category or against its monthly invoice.
- Revalue the marketplace's balance in another currency at year end.

Who can

Finance, the branch manager and the administrator.

How to do it

1. **Record payout.** Marketplace payout number, received on, period, amount received in bank and the bank account.
2. **Deductions.** "Add deduction": category, amount and, if needed, the order. If the commission is billed by a marketplace invoice, choose that invoice.
3. **Orders.** Tick the orders the payout settles. Total at the bottom: received in bank + withheld.
4. **Exchange difference** — if the orders are in another currency: plus means you received more than recorded, minus means less.
5. **Post the payout.** If the amount was calculated at the ECB rate, enter the amount from the bank statement: the difference goes to exchange differences.
6. **Revaluation at date** (usually 31 December): unsettled orders in a foreign currency are recalculated at the ECB rate; the next day the revaluation reverses itself.

Common messages

- **"Selected orders were paid …, the payout is …"** — the amounts do not match: check the marketplace report.
- **"We owe the marketplace…"** — it will deduct buyer refunds from the next payout.
- **"No bank account…"** — create one in "Organisations".
- **"No open marketplace invoices…"** — enter its invoice for the period under supplier invoices.

Questions and answers

Why does the branch manager have no access to payouts? The marketplace account is shared by the whole organisation, so payouts can only be viewed and recorded with a role for the whole organisation (finance, the branch manager, the administrator). Someone whose role covers only one branch gets "No … permission …".

Do I have to record Allegro payouts by hand? If "Import Allegro fees and payouts" is on in the "Allegro connection", the program creates and posts the payout itself for every withdrawal to the bank: the

amount to bank, Allegro fees and the paid orders. It is not created automatically, for example, without a "Bank account for Allegro payouts" or if the channel fee comes from the marketplace invoice — then record the payout here. The amount is calculated at the ECB rate: enter the statement amount.

Can one order be settled by two payouts? No: an order is settled by only one posted payout. If you try again, the program replies "Order … is already settled by payout …".

How do I fix a mistake in a posted payout? "Finance" → "Documents" → open the payout → "Cancel document" and give the reason, then record the payout again: its orders can be ticked again.

How do I cancel a revaluation at date? First cancel its reversal — the same document on the next day — and then the revaluation itself. Otherwise the program replies "First cancel the revaluation reversal …".

Where next

- "Documents" — payments and the marketplace's supplier invoices.
- "Orders" — the channel's orders and their payment.

Marketplaces and sales channels

In short

All sales channels of the organisation in one list. "Marketplaces" are platforms (Allegro, Amazon, eBay) you sell through, either as an intermediary (the buyer is the end customer and the platform collects the money) or as a platform that buys from you. "Sales channels" are direct customers (workshops, shops) that get your price list and send orders.

Why it matters

- See every platform and customer price list in one place without opening each customer card.
- Jump straight to the channel price list, its orders, the Allegro connection and platform payouts.

Who can

An organisation-wide manager with the sales channels permission, and the administrator.

How to do it

1. **Find a channel.** Tabs "Marketplaces" and "Sales channels"; the customer is shown under the channel name, with a link to the customer card.
2. **Channel actions.** Icons on the right: "Channel price list" (columns, format, sending), "Channel orders", "Allegro connection" (marketplace as agent), "Marketplace payouts", "Edit" (prices, warehouses, on order). "Price from purchase cost with supplier delivery" (with "on order"): the supplier's delivery to us is added to its price, by the delivery rule or its 90-day delivery share; on for new channels, off for existing ones until you turn it on. "Only products with weight": a product is sellable only when there is a weight to calculate delivery; products without weight (own stock — the card weight, on order — the weight from the supplier price list) do not go into the channel price list, and the preview shows how many were skipped. Off by default — as before.
3. **New channel.** Created in the customer card: "Sales → Customers & suppliers" → customer → "Sales channels" → "Add channel".

4. **Channel warehouses.** Empty — all warehouses of the organisation: everything free (not reserved) is sold. If the branch has an "Online shop" warehouse, the channel order is created there and the reserved goods move there automatically (within the branch, at once). A web order awaiting payment is not moved: after payment, use "Move to the order's warehouse" in the order card.

Common messages

- **"No marketplaces yet"**: platform customers do not have a channel in "Marketplace as agent" or "Marketplace as buyer" mode yet.

Questions and answers

Can I delete a channel? No, channels are not deleted. In "Edit", turn off "Channel active": the channel is marked "disabled", orders through it are not accepted, and the price list is no longer sent on schedule or served by link. It can be turned back on while the channel's customer is active; with an inactive customer the channel cannot be saved ("The customer is inactive or their data is blocked.").

Why can't I change the mode of a marketplace-as-agent channel? Such a channel has a marketplace account — money buyers paid to the marketplace that it has not transferred to us yet. While the balance is not zero, the program replies "The marketplace account holds …: the channel mode cannot be changed until the marketplace pays out."; record its payouts first.

At what prices does the channel sell? By the policy chosen in "Channel prices". If none is chosen (or it is disabled) — by the policy of the channel's customer. If there is none either, own stock goes at the product's retail price (without one — by the organisation's policy), and on-order products by the organisation's policy from the supplier price.

Why is the on-order lead time in the price list longer than the supplier's? The customer sees the supplier's lead time plus the "Extra days on top of supplier lead time" from the channel settings — time for receiving and shipping. Set it to 0 if you do not need that margin.

Where next

- "Customers": the customer card with its channels.
- "Connections": the state of platform connections.

Online store

In short

The organisation's storefronts: a website where products, prices, stock and orders come from Engrana. For each storefront — settings (address, domain, languages, site brand, delivery and pickup), categories, collections, product publishing, preview links and the launch readiness report.

Why it matters

- Sell parts on your own website without a separate shop program.
- Decide which products buyers see, and hide those that are not ready.
- Let a lawyer or the gestor review the closed storefront before launch.

Who can

A branch manager with the "Online store" permission and the administrator.

How to do it

1. **New storefront.** A "Marketplace as agent" sales channel, name, address (/shop/<address>), optionally your own domain, the main language and the storefront languages.
2. **Site brand.** Header name, font, colours and logo (after the storefront is saved). Set the logo origin: "Photo or drawing without AI", "AI-edited", "AI-generated: looks like a photo" or "AI-generated: illustration". AI images on the website are only for decoration (banners, backgrounds, sections, logo): no third-party logos or recognisable people, from a generator licensed for commercial use. "AI-generated: looks like a photo" images are labelled underneath on the website ("AI-generated image" in English). "AI-generated: illustration" images (drawing, logo, icon) get no label underneath, but the alt text says so and one sentence appears at the bottom of the website ("Some illustrations on this website were created with AI."). Both are marked in the file, as recommended under the EU AI Act. Choose "illustration" only if the image clearly cannot be mistaken for a real photo; if in doubt, choose "looks like a photo". The same applies to storefront section photos (section window, "Photo origin"). Product photos are never drawn by AI — only a real photo may be edited. **Home page.** Home page title and subtitle in each storefront language (up to 80 and 160 characters); if empty, the default title and subtitle are shown in the storefront language ("Parts for your vehicle" / "Choose a section to get started" in English, "Recambios para tu vehículo" / "Elige una sección para empezar" in Spanish). If the storefront has sections, the home page shows the section tiles, the finder of the chosen section (make → model → year, tyres by size or oils by specification), its categories, the enabled ways to receive the order, new products and the "Shall we fit it?" block if workshop fitting is enabled.
3. **Sales and delivery.** Safety stock, order handling time and cut-off, selling on order from the supplier, direct shipping from the supplier, store pickup, fitting at the workshop, email, phone and WhatsApp for buyers, terms of sale and privacy policy. Every page footer links to the «Aviso legal» (legal notice): name, tax ID, address and registration details from the organisation card, plus the storefront's email and phone. Check them in the organisation card before opening sales.
4. **Categories and collections.** Only published categories appear on the storefront; collections are the top menu.
5. **Storefront products.** Tick products → "Publish", "To draft" or "Unpublish". Red remarks block publishing, yellow ones are hints. "Publication import" — a list from a file.

6. **Preview links** — for a reviewer without an Engrana login: valid until a date and revocable at any time.
7. **Payment on the website (Stripe).** Connect Stripe in "Connections"; the shop channel needs a marketplace account; then turn on "Payment on the website". The buyer pays on the Stripe page, and the order counts as paid only after Stripe's notification. Test orders use the test key (test card, no money).
8. **Readiness report** — what is needed for live sales. Live sales are switched on by the owner after payments are connected.
9. **Tyres on the website.** The buyer types the size as on the sidewall ("205/55 R16") or picks it in the "Tyres by size" form. Above the results are filters: season, brand, model, vehicle type, price per tyre, speed and load indices, EU label classes, OE approval (car maker), XL, Run-flat, 3PMSF, M+S, studs, rim protector, Seal, Silent, for EVs, stock and "4 or more in stock". Each option shows how many tyres will remain if it is ticked; the button shows, instantly with every tick, how many were found. The filters use the characteristics of the "Tyres" category: fill them in with "Tyre marking" in the catalogue. Tyre page: full marking ("235/65 R16 115/113R C"), season, 3PMSF, XL, Run-flat and other badges, model; 4 tyres go to the cart by default; "Other sizes of this model" links the same model of the same brand in other sizes. **Tyres "with fitting".** With "Fitting at the workshop" and the "Tyres" module on, choosing "Montaje en nuestro taller" shows the work for each tyre at checkout: fitting and balancing, valve and old tyre disposal, with prices from the work types (NEU-MONTAJ, NEU-VALVUL, NEU-RECICLAJE; they are not in the starter set: load them with the "Work types" file or create them with these codes) including VAT, for information only: the work is paid at the workshop. The buyer can tick "keep my old tyres": no disposal, at the season fee from the "Tyres" module settings; the storage is registered and invoiced in that module when the car arrives, not in the estimate. The workshop appointment lists the work, and the first estimate of the repair order starts with it. The tyre page shows a "Fitting at our workshop" block with the work total per wheel.

Common messages

- **"The “Online store” module is not enabled…"** — an administrator enables it on the "Modules" page.
- **"No free “Marketplace as agent” channel"** — create such a channel in "Marketplaces and sales channels".
- **"Engrana draft"** — the storefront has no terms of sale or privacy policy of its own: the drafts are only for test orders.
- **"The link is shown only once"** — copy it right away; later you can only revoke it and create a new one.

Questions and answers

Why can't a product be published? A red remark on the product blocks it, for example: "no category", "category is not published in the storefront", "no price under the channel policy", "no package weight and dimensions — shipping cannot be calculated", "brand blocked". Yellow ones ("no photo", "no description" and others) do not block publishing.

Why does the website show less stock than the warehouse? The storefront shows the free stock of the channel's warehouses — without what is reserved for other orders — and also subtracts the "Safety stock, pcs" from the storefront settings.

Can the website sell a product that is not in stock? Yes, if "Sell on order from the supplier" is on: the product is shown with a price by the channel policy from the purchase cost and with the supplier's lead time; the buyer does not see the supplier. Only new parts with stock and a lead time are taken, from price lists no older than "Supplier price list no older than, hours" (48 by default).

For how many days can a preview link be given? From 1 to 30 days; it can be revoked at any time. A storefront has at most 50 active links. The link only allows viewing the closed storefront and does not open it to search engines.

Where next

- "Marketplaces and sales channels" — the storefront's channel, its prices and warehouses.
- "Orders" — orders from the website.
- "Reference data" — storefront collections.

Order actions

In short

The customer order page where the work happens: reserve from stock, hand over (also in parts), invoice handed-over items, take payment (advance or balance), cancel, and record a customer return. At the top: order total, invoiced, paid and what the customer owes.

Why it matters

- Hand over goods, invoice and take money without going to separate documents.
- Record a return so that stock and money match.

Who can

Reserve: sales, the service advisor and the branch manager; hand over and cancel: sales and the manager; invoice and take payment: also the service advisor and finance; customer returns: sales and the manager (without that permission there is no "Return" button). The other buttons are visible, but without the permission the program refuses the action.

How to do it

1. **Reserve.** "Reserve from stock" — the goods are held for this order and will not go to another customer.
2. **Hand over.** "Hand over" → quantities (you can hand over part: the rest stays pending). For a marketplace order, "Carrier" and "Tracking number": the number is sent to the marketplace together with the "sent" status.
3. **Invoice.** "Invoice handed-over items" — the invoice covers only what has been handed over and is official at once, with its series number; it can only be corrected with a corrective invoice. If a private customer asks for a full invoice instead of a simplified one, tick "Full invoice": the customer needs a DNI/NIE on file.
4. **Payment.** "Take payment": payment before handover is an advance; after it, the remaining balance. When a private customer pays the whole order before handover, the invoice for the whole order is issued by itself at payment (the law requires it), dated with the payment day; there is no second

invoice at handover. When they pay only part (a deposit), an advance invoice for that amount is issued at once, split across the order's VAT rates; the final invoice (at handover or when the order is paid in full) lists the goods minus the advance on an "A deducir: anticipo, factura …" line, with VAT only on the rest. If the advance fully covers what is handed over, the final invoice is for zero. If it could not be issued (for example, the amount is above the simplified-invoice limit and the order is for a walk-in customer), "Invoice paid order" appears: choose "Customer for the invoice" (with a DNI/NIE on file), tick "Full invoice" if needed and press it. If part of the order was handed over without an invoice, first "Invoice handed-over items". A payment whose invoice covers goods not yet handed over cannot be cancelled: first annul the invoice or issue a corrective one. A company is invoiced as before, for what is handed over.

5. **Return.** "Return" → quantity, "Condition" ("Can be resold" or "Defective"), "Return warehouse", "Return reason" and "Money to the customer". If the goods need checking first, turn on "Inspect the goods first: money after the inspection", then in "Returns under inspection" press "Approve" or "Reject".
6. **Cancel the order.** "Cancel" — the reservation is released; the order stays in the list as cancelled.
7. **Cancel with refund.** The order is paid but nothing has been delivered (for example, the supplier did not deliver or the customer changed their mind): "Cancel with refund". A corrective invoice is issued for each invoice of the order for the whole remaining amount, all the money goes back to the customer ("Money to the customer"; what was paid through the marketplace is refunded by the marketplace) and the order is cancelled. Enter the "Cancellation reason": it is printed on the corrective invoice. The tax is reduced in the period of the corrective invoice. For a partly delivered order, first record a "Return" of the delivered goods.
8. **Remove line with refund.** One line is missing (the supplier did not deliver it) and the rest ships: "Remove line with refund": enter how much will not be delivered and the reason. The program reduces the order, corrects the invoice for the removed goods (in Poland, the receipt and an entry in the returns register), releases the reservation and refunds the overpayment the way the customer paid (marketplace order — through the marketplace). The rest is delivered as usual.
9. **Website order paid through Stripe.** A return "through the marketplace" refunds the buyer through Stripe when posted — you need the "refund payments" right (branch manager, finance). Stripe refuses — the document is not posted; Stripe fails to refund — shown in "Orders → Unrecorded Stripe payments".

Delivery address. Under the order number: “Delivery:” and the address. When you create an order, after choosing the customer their default delivery address is filled in; if they have several, choose one; “Registered” means no separate address; “Another address…” lets you type a new one and, if you wish, “Save this address to the customer card”. The order keeps a copy of the address: changing it on the customer card does not change the order. “Edit” next to the address chooses another; the shipment takes the order's address at the time of issue, and the address is printed on the order PDF. The country for tax is the separate “Delivery country” field.

InPost shipment (Poland). The block appears when the organisation has a delivery contract with the "InPost (ShipX)" connection ("Logistics" → "Delivery" → contract → "Connection"). "Parcel locker:" is the recipient's point: the buyer chose it on the website, or use "Select" / "Edit" to search by postcode, city or code (before the shipment is created). "To a parcel locker" — size A, B or C is suggested from the products' package weight and dimensions; "By courier" — length, width, height (mm) and weight (kg), which you can adjust. "Create InPost shipment" takes the recipient only from the order's delivery address (or the website buyer's contact, the customer card); phone and e-mail go only to InPost. Pressing again is safe: there will be no second shipment; if InPost did not answer, press again and the program first

finds the shipment by the order number (wait a minute). If the check keeps failing, look in the InPost panel and press "Link by InPost number" or "Not in the InPost panel — create again". "Label A6" / "Label A4" — the PDF is saved in the order, then "Open label"; the label carries the recipient's name, address and phone, so it is deleted 360 days after delivery (return, cancellation), or 360 days after creation if never handed over. The tracking number arrives from InPost within a minute or two ("Update", or automatically every 15 minutes): it goes into the order's goods issue (carrier "InPost"), the buyer's order page and the marketplace, like a number typed by hand.

Print the order. “Order” next to the number: a PDF for the customer with the lines, the amount paid, what is still due and the expected date. A “special order, no return” part is marked on its line and the text below the table says a part in working order is not taken back at the customer's wish, while the warranty for defects or non-conformity remains; there is room for the customer's signature. When such a line is returned, the dialog reminds you.

Prices excl. or incl. tax. Above the order totals there is a "Price excl. tax / Price incl. tax" switch: how you see line prices and amounts (remembered for you); the other price shows in small print below. Under the table, "Net", VAT per rate and "To pay", calculated the same way as on the invoice. The switch changes nothing in the order.

Common messages

- **"Reason for releasing with debt"** — the customer owes more than allowed: you can hand over only with a reason.
- **"This branch has no cash register."** — a cash refund is not possible: choose card, bank transfer or reducing the debt.
- **Money for a marketplace order** is refunded by the marketplace and deducted from the next payout: it does not go through the till.
- **"For InPost the order is missing: …"** — add the phone, e-mail (for a courier — street, postcode, city) to the order's delivery address or the customer card.
- **"There is no active contract with an InPost connection…"** — connect InPost in the organisation's delivery contract.

Questions and answers

Why is there no "Cancel" button? "Cancel" is only there while nothing has been handed over or paid on the order. Paid but not handed over — "Cancel with refund" (a corrective invoice and a refund); something already handed over — first a "Return" of what was handed over.

Why can't I take back an item that was handed over? Only what was handed over and invoiced can be returned, minus what has already been returned and what is under inspection; more than that gives "Returning more than was delivered and invoiced: at most …". If the item was handed over without an invoice, use "Invoice handed-over items" first.

Where does a return marked "Defective" go? To the "Return warehouse", but not back on sale: it stays reserved for that return until the claim to the supplier. With "Can be resold" the item is free in stock again at once.

What do I choose in "Money to the customer" if the customer has not paid yet? The field is shown when "Inspect the goods first: money after the inspection" is off (it is on by default), or on "Approve". Choose "No money refund: reduce the customer's debt" — the return amount reduces their debt. If after the return more has been paid on the order than the customer owes, this is not allowed: the program replies "The customer has already paid for these goods: refund … in money — cash, card or transfer."

(for a marketplace order — via the marketplace).

Why can't I refund in cash? Cash refunds are only made from a cash till and for no more than it holds right now: otherwise "Cash in till …: cannot pay out …". Refund by card or transfer instead.

Where next

- The order page in "Orders" — fulfilment status and history.
- "Documents" — invoices, handovers, payments and returns.

Order page

In short

One customer order in full: where it came from and its source number, the buyer, items with reservation and handover, amounts (for a marketplace order, also the marketplace total and the ECB rate), order documents and the change history.

Why it matters

- See the state of the order: what is reserved, handed over and paid.
- Move the order through your own fulfilment statuses and not miss the payment deadline.

Who can

Viewing the order: anyone with the orders permission; changing the status and payment deadline: sales and the branch manager; the storekeeper only to statuses in the "In work" and "Sent" groups. A customer return can be posted by staff with the "customer return" permission (sales, branch manager).

How to do it

1. **Change the status.** "Order status" field → pick the new status. The change goes into "History".
2. **Hand over, invoice, take payment, return.** The "Order actions" button opens the customer order page with all actions (see its article).
3. **Payment deadline.** An online store order has a "Payment deadline": an order that is neither paid nor delivered by then is cancelled and its reservation released. "Payment deadline" button → "Due date" and "Reason" → "Save", or "Remove deadline".
4. **E-mail to the buyer.** The "E-mail to buyer" line shows whether the confirmation was sent and why not; "Send e-mail" or "Send again".
5. **Buyer return request.** In "Buyer return requests", "Accept" or "Reject" (the buyer will see the comment on the order page). Accepting returns nothing by itself: then use "Record return".

Common messages

- **"reservation shortage"** — there is less in stock than in the order: wait for the delivery or order from a supplier.
- **"not sent: server mail is not configured"** — no e-mails go out until the administrator sets up mail.
- **"daily e-mail limit for this address reached: send it manually"** — this buyer has had many e-mails today.
- **"Nothing to return for request …"** — the goods are not yet issued and invoiced, or already

returned.

Questions and answers

Why was the order cancelled by itself? Its "Payment deadline" passed while it was unpaid and nothing had been handed over: the program cancels such an order, the reservation is released and the goods are available to other buyers again. "History" shows the reason "Payment deadline passed".

Is an order with a payment or a handover cancelled by the deadline? No. The deadline is removed automatically, and "History" shows "Payment deadline removed: the order has a payment or delivery"; what to do next (for example, a return) is up to the staff.

How far can the payment deadline be extended? Up to 30 days from now, and the "Reason" is required — it is shown in "History". A deadline can only be set on an unpaid, undelivered order.

Why didn't the e-mail to the buyer go out? The reason is in the "E-mail to buyer" line: "server mail is not configured", "the site address for links is not configured", "daily e-mail limit for this address reached: send it manually", "the mail server rejected the address", "mail server error" or "error preparing the e-mail". The limit is 10 e-mails from the shop to one address per 24 hours; "Send e-mail" or "Send again" by staff does not count towards it.

Where next

- "Order actions" — reservation, handover, invoice, payment, return.
- "Order documents" — number, date and status of each document.
- "Orders" — the list of all orders.

Parts: counter sale

In short

A quick sale to a customer at the counter: search → cart → payment → handover. Customer orders (items on order, partial handovers) live under "Orders".

Why it matters

- Sell a part in seconds: barcode scanner, cart, cash or card payment — and the invoice straight away.
- See right in the search whether the item is in stock.

Who can

Counter sales: sales staff and the branch manager. No pay button means no permission.

How to do it

1. **Find the item.** Scan the barcode or type the part number, EAN or name (two characters or more). Stock on hand is shown next to it. **By plate.** "Registration plate" → "Find parts": the program finds the car in the base (by its current or an earlier plate) and shows the parts that fit it: "fits" — the TecDoc type (KType) matches; "check" — make, model and years match, check the condition on the item card. The search uses the fitment entered on the item cards; with search text the whole catalog shows, parts that fit the car first. If the car is not in the base, it is added on the customer

card; the provider's plate lookup (paid) is connected by the administrator and used by the service advisor and the seller. **Oil.** "Find oil" → viscosity, specification or approval, JASO, litres → oils with availability and price; "Add the set" puts the cheapest set of cans for those litres in the cart, only from what is on the shelf.

2. **Add to cart.** "Add to cart"; change the quantity with the plus and minus buttons, remove extras with "Remove".
3. **Customer.** "Customer (optional)" — pick a customer if the invoice should be in their name or they have their own prices.
4. **Pay.** Choose "Cash" or "Card" → "Pay and hand over". The sale and invoice numbers appear in the message. If a private customer asks for a full invoice instead of a simplified one, tick "Full invoice": the customer needs a DNI/NIE on file.

Price excl. or incl. tax. Above the cart there is a "Price excl. tax / Price incl. tax" switch: how you see and enter prices (remembered for you). The customer always pays the price incl. VAT, as on the price tag: a price entered excl. tax becomes the price incl. VAT to the cent, and the other price shows in small print under the field. "Net", VAT per rate and "Total" are calculated by the program the same way as at payment; while it calculates, the pay button waits.

Nowhere to be found: “Find manually”. If the part number is neither in the catalogue nor at the connected suppliers, use “Not at the suppliers? Find manually” below the results (or “Find manually” on a line with no stock). The form asks for the part (a new card with brand and number), where it comes from (a supplier from the list or a new one with its tax status), the purchase with delivery and lead time, the customer price by the markup rules, the customer and the prepayment. “Special order, no return at the customer's wish” is on by default and is printed on the order for the customer to sign. “Place” creates the customer order and the supplier order for it. Later, a search for that part shows “Last time bought from…”.

Restock the showcase. If the branch has a main warehouse and a "Showcase" assigned, the counter sells from the "Showcase". After a sale, "Restock the showcase" appears above the search: what was sold and is in the main warehouse. "Move to the showcase" posts one transfer (reservations in the main warehouse are not touched). The same list is in Stock, "Transfers" tab.

Common messages

- **"This branch has no cash register."** — payments need a cash register; the administrator creates one under "Companies".
- **Out of stock** — the item is not available; create a customer order under "Orders".
- **Deposit for the old part** — added to the price; refunded when the customer returns the old part and the supplier accepts it.

Questions and answers

Can I sell at the counter on credit? No: "Pay and hand over" posts the order, handover, invoice and payment in one go — in cash or by card, for the full amount. To hand goods over with debt, use an order in "Orders", under the customer's payment terms.

Why won't a sale without a customer go through for a large amount? In Spain a simplified invoice can only be issued up to €400 including tax; above that the program replies "The amount … is above the simplified invoice limit (…): enter a customer with tax details for a full invoice.". Pick a customer with a tax ID in their card in "Customer (optional)".

Why did cart prices change when I chose the customer? Prices are recalculated by that customer's price policy. A price you changed by hand is left as it is.

How do I take back an item sold at the counter? A counter sale is an ordinary customer order: find it in "Orders" (source "Counter / manual"; the number is in the sale message), open "Order actions" → "Return". Returns are posted by the salesperson and the branch manager.

Where next

- "Orders" — a customer order awaiting supply, partial handover and payment.
- "Warehouse" — stock and receipts.
- "Deposits" — refunding deposits for old parts.

Requests: the customer enquiry before the order

In short

A request is a quick record of a customer enquiry: who it is, which car and what they need. Items are typed as text (brand, part number, name) without searching the catalogue. In each line the price works both ways: from cost and markup, or from the price quoted to the customer. You see how much you earn on the request.

Why it matters

- Answer a customer on the phone within a minute and never lose the enquiry.
- See what is still unanswered, what has been quoted and why sales were lost.
- Quote a price with the profit you want without working out the markup by hand.

Who can

Reception, sellers and branch managers see and handle requests (of their own branch). Only staff allowed to see cost prices see and change the cost, markup and profit; without that permission a line shows the customer price only.

How to do it

1. **New request.** «Requests» → «New request».
2. **Car.** With the customer chosen, tap the «Plate» field: a list of their vehicles opens (plate, make and model, year); pick one. As you type, other vehicles on file appear below marked «another owner» (the name only with the right to see customers). You can also type the whole plate (or VIN): a car already on file fills in by itself together with its owner, who becomes the request's customer. If the car is registered to someone else, a yellow warning appears; the owner on file does not change by itself («Use the car's owner» or «Another car»). A new car is added to the vehicle list on saving; the same plate is never created twice.
3. **Customer.** Search by name, phone or tax number; if missing, «New customer». The customer is optional.
4. **Lines.** Brand, part number, name (a part number or a name is required) and quantity. From the second letter, "Name" suggests product types ("filter" → "Oil filter", "Fuel filter"…), most used first: picking one fills in the name and the line remembers the type; you can add to it, or type your own

text without picking. Enter the price any way:

- **cost and markup %** → net price and customer price (by the pricing policy, with its rounding);
- **customer price incl. tax** or **net price** → the markup is worked out backwards (a price you type is not rounded);
- changing the tax % keeps the customer price; the net price and markup are recalculated;
- cost only → markup from the pricing policy. Under the markup you see what it came from: from the markup or from the price; below the policy's minimum price it shows in red. **Options (up to three).** On a line, «+ option»: the same item (name and quantity shared) with another brand, part number and price; label «Original», «Recommended» or «Cheapest» and the «Lead time / stock» field. «Chosen» — what goes into the order; the request total counts the chosen option and, without a choice, the first one. **Suggest options.** On a line with a number (OE or manufacturer number), «Suggest options»: by the number and its catalog equivalents — «Original» (the vehicle maker's brand), «Recommended» (the first brand on the «Recommended brands» list in the organization details that has an offer) and «Cheapest» (the cheapest equivalent, if it costs less than the recommended one). The offer comes from our own warehouse or a supplier price list with enough quantity; customer price by their policy, lead time in the documents language. The ticked options replace the item's options, and then everything is edited as usual. **Customer's choice.** On the offer link page the customer picks one option or "Not needed" for each item and presses "Confirm selection". The request shows "Customer chose via the link" with the date; the list shows a "Customer chose" mark and the menu a counter until the request is opened. If the customer tells you by phone, use "Customer's choice" in the request. The choice can change until the order is placed; a "not needed" item is left unticked in the order window. **What customers choose.** «Finance» → «Customer choices» (reports permission): for the period, by each request's last choice — how many items were chosen as «Original», «Recommended», «Cheapest», no label and «not needed», their share and amount (as the customer saw it), via link and as the customer said; below, the chosen brands. Useful for purchasing. **Screenshots and photos.** Below the lines, «Screenshots and photos»: paste a chat screenshot into the card (Ctrl+V or Cmd+V), drag a file or press «Camera» / «File». Location and phone data are not saved. Tap a thumbnail to see it full screen; «Part in the photo» links it to a line. Photos are not sent to the customer. Up to 20 photos per request. **Dictate.** Microphone button next to the line name and the comment: the browser (Chrome, Safari) recognises the speech and only the text is saved in the program. The language is next to the button (ES, RU, EN, PL). If the browser cannot recognise speech, there is no button. **Voice message.** «Voice message» button below the lines: record what the customer needs (up to 2 minutes) and press «Stop». The recording is saved in the request (in «Screenshots and photos», not sent to the customer) and the AI model from «Connections» → «Document recognition» (ChatGPT with audio or Gemini; Claude does not accept audio) returns a transcript and draft lines: tick the ones you need and «Add lines». Nothing is added by itself. The analysis only works if the organisation has «Analyse voice messages with AI» turned on («Settings → Companies» → company): the audio goes to the AI provider. The cost counts towards the monthly AI limit. **Lines from file:** if the customer sends the list as a spreadsheet (XLSX, CSV), «Lines from file» adds it to the request (columns as in the lines table, headers in English, Spanish or Russian; «Template» is next to it). A row with an error is not added — its number and the reason show above the buttons. The lines are saved with «Save». Without the right to see costs, the cost column is not loaded.

1. **Save.** A new request gets a ZAY-… number; with its first lines it moves to «In progress». Until you press «Save», the program keeps a draft of your changes on the server by itself. If the tab was closed, the connection dropped or the page crashed, opening the request again (a new one — in

the same branch) shows «Restore unsaved changes?»: «Restore» brings the changes back to the screen, «Delete draft» throws them away. Only you see the draft. It is deleted on «Save», when the request is closed (order placed, refused), with «Don't save» when leaving, and after 30 days without changes.

2. **Status.** «Offer sent» — once you have quoted the customer. «Declined» — only with a reason; the request closes and «Back to in progress» reopens it. «Order placed» is set automatically by «Place order».
3. **Place order.** Saved request → «Place order». The catalogue product is matched by the line's brand and part number (as in file imports): one match — «found»; several — pick one; none — the reason and a product search. The order price is the one quoted to the customer; tax follows the product (if the product's rate differs or the customer is a tax-exempt EU company, the request's net price is used). A core deposit, if any, is a separate line. The order opens by itself; the request becomes «Order placed» with a link to the order, and the order shows «From request ZAY-…». In the window each line has an order tick: by default the chosen option and items with a single option; at most one option per item. Anything unticked stays in the request («Partly ordered») and is ordered later as a second order. If the order is cancelled, its options are free again. A customer and permission to place customer orders are required. In the window, «Delivery address»: the customer's default delivery address is filled in; you can choose another of their addresses, «Customer's registered address» (no separate address) or type a new one; saving it to their card needs the right to edit counterparties. The order keeps a copy of the address.
4. **Make estimate.** The car and the customer are required. «Make estimate» opens the car intake with the plate, customer and reason for visit from the request: the car is received as usual (with a deposit receipt, so the car is at the workshop; intake in the request's branch). If the car is already received without an estimate, «Make estimate in RO-…» puts it into that repair order. After intake the request lines become the repair order's estimate: a product matched by brand and part number as a catalogue part, the rest as text lines; net price from the request. The request becomes «Order placed» with a link to the repair order, and the repair order shows «From request ZAY-…». If the repair order is cancelled or the customer rejects the estimate, the request goes back to «In progress».
5. **Comments.** At the bottom: who called, what the supplier answered. Saved at once, in any status.

On a phone the lines are cards: tap one to open it at the bottom of the screen, «Done» returns to the request and «Save» is at the bottom.

Customer quotation

Above the lines of a saved request there is a "Customer quotation" bar.

- **"Print"** — a "QUOTATION" form (OFERTA in Spain) in the country's document language: description, quantity, price and amount incl. tax, "Total to pay" and the validity date. Each line: "Name — BRAND"; the part number only with the "Show part number" box next to "Print" (remembered, off by default; same in estimates, orders, invoices and in the e-mail and WhatsApp send windows). No cost, markup or comments. Line names are printed as typed — write them in the customer's language. For a company or a self-employed customer (autónomo) the base and tax per rate are shown under the total.
- **"Customer view"** — the same on screen, in large type, to turn the screen towards the customer. Nothing can be edited there; "Staff view" brings back the normal view, and a reload always opens it.
- Validity: 3 calendar days from the quotation date; an administrator can set another period in the

organisation details ("Request quotation validity, days").

- Unsaved changes: save first — the form and the customer view show the saved request.
- **"By email"** — an email to the customer with the quotation PDF attached. The address comes from the customer card (you can enter another one, a single address); the email text is ready in the document language and can be edited (up to 2000 characters). "Mail (SMTP)" must be set up in "Integrations".
- **"Via WhatsApp"** — opens WhatsApp with a ready message and a link to the quotation. With the link the customer, without logging in, sees who sent it, the total and the validity date and downloads the PDF. The link works until the end of the validity period plus 30 days; a new link replaces the previous one, and it can be revoked from the history.
- Sending needs a customer on the request, a price and a name on every line, and a request that is not closed ("Order placed", "Declined"). It needs the right to work with requests and access to customer data. After sending, the status changes to "Offer sent" by itself.
- Under the bar is the sending history: when, how, to whom, the amount and who sent it; "PDF" opens exactly what the customer received (prices at the time of sending). A customer who has blocked their data gets no quotation and their links do not open; erasing the customer's data deletes the PDFs and addresses.

Profit on the request

On the right (with permission to see costs): cost and sales net of tax, «We earn», markup on cost, margin (the share of profit in the net price), tax and «Customer pays incl. tax». Percentages use only lines with a cost; lines without a cost count towards the customer total but not the profit, and their number is shown under the box.

The list

Search by request number, customer, phone, plate, VIN, brand, part number and line name; filter by status and period. By default — «Open»: new, in progress and offer sent.

Common messages

- **«The request is closed: the quotation can no longer be sent.»** — the request is declined or has an order; put it back in progress if the quotation is still needed.
- **«Select the request's customer first.»** — the quotation goes to a specific customer: select them in the request and save.
- **«Enter a single email address.»** — the «To» field takes a single address, without commas or «;».
- **«The WhatsApp number does not look like a phone number: enter it with the country code.»** — enter the number with the country code, e.g. 34600111222.
- **«Too many quotation sends in a row. Try again later.»** — more than 5 sends per hour for one request (or 20 by one employee, 200 a day per organisation); wait.
- **«Line N: enter a name or a part number.»** — the line has only a brand or a price; add a part number or a name.
- **«The request is closed — put it back in progress first.»** — it was declined or an order was made from it.
- **«Give a reason for declining.»** — a request cannot be declined without a reason.
- **«VIN — 17 characters: digits and Latin letters except I, O and Q»** — usually the letters O or I

were typed instead of the digits 0 and 1: click «Replace» under the field to use the corrected VIN. Or leave the field empty.

Questions and answers

How do I work out the price from cost and markup? Enter the net cost and the markup %: the net price and customer price are calculated for you. If you quoted the customer a different price, type it and the markup is recalculated.

Why can't I see the cost and the profit? Only staff allowed to see cost prices see them. Saving a request without that permission does not erase the cost or markup.

How do I close a request if the customer declines? «Declined» → reason → «Mark as declined». The reason shows in the history and under the «Declined» filter.

Where next

- «Sourcing» — find the part in the catalogue and at suppliers.
- «Orders» — place the customer order.

Sourcing: the item and where to get it

In short

One screen to find an item and decide where to get it from. First the item (part number, EAN, OE, name or section attributes). Then, for the chosen item, your warehouses and suppliers: lead time, quantity and the price for the customer under their price policy. Below — cross numbers and replacements.

Why it matters

- Answer the customer at once: is it available, when will it arrive and how much it costs.
- Choose a supplier by lead time or by price without opening price lists one by one.

Who can

Anyone who sees the product catalogue can open sourcing. Supplier offers are visible with the price-list permission. Cost, delivery and margin — with the permission to see cost. The supplier score — with the supplier-rating permission.

How to do it

1. **Find the item.** Type the part number, EAN, OE number or name (at least two characters). "Filter" — catalogue section, brand and section attributes (viscosity, tyre size…). The same part number of different brands is a separate row.
2. **Choose the customer and quantity.** "Customer" — the price follows their price policy; without a customer — as for a retail buyer. "Quantity" — how many you need: suppliers with fewer are hidden (clear "In stock only" to see them all).
3. **Choose the item row.** On the right:

- **Our warehouses** — how many are free (stock minus reservations) and the lead time to your warehouse by route;

- **Suppliers** — the supplier's warehouse, lead time, quantity and the customer price (with tax). With the permission to see cost — also cost, delivery and margin.

1. **Sort.** "Best" — price with delivery adjusted by the supplier score: 80 and above — no adjustment, 60–79 or "little data" — as if 5 % dearer, below 60 — 15 %; on a tie — the faster one. "Faster" — by lead time. "Cheaper" — by customer price. The choice is remembered.
2. **Check with the supplier now.** After opening, the program checks price and stock with the five best suppliers that have an API connected (the answer is kept for 10 minutes); "now" means checked. "Check now" — again, without the stored answer.
3. **Cross numbers and replacements.** Below the offers — cross numbers with the availability colour (green — here, yellow — can be obtained, red — nowhere). Clicking one makes it the chosen item.
4. **Add to a document.** In the repair-order estimate, a new customer order and at the counter — the "Find item" button: in the window, on the offer row, "To repair order", "To order" or "To counter" — the line goes into the document with that offer's price (in the estimate — without tax). To the counter — only what is on the showcase shelf. From the "Sourcing" menu — "Add to…" → "Counter" or "New customer order". "Order from supplier" opens the supplier order with that line and the chosen price-list warehouse (needs the permission to create supplier orders).
5. **On order from a supplier.** A line taken from a supplier's offer remembers that supplier and its price-list warehouse: below the line it says "On order from …" ("Remove": order from anyone). In "Purchases" → "What to order" that part shows "On order from …", and "Order selected" opens an order to that supplier at the price of the warehouse chosen in "Sourcing". If the supplier is later deactivated, the mark is removed automatically and the document is saved.

Common messages

- **"Supplier offers are visible to staff with the price-list permission."** — you do not have it; only your warehouses are shown.
- **"No price"** — there is no price policy for this cost; enter the price in the document.
- **"… did not answer — price from the price list"** — the supplier API did not answer; the last price list is shown.
- **"Not on the shelf — create a customer order."** — the counter hands out only what is on the showcase.

Questions and answers

How do I choose whom to order from — faster or cheaper? "Faster" puts first the one who delivers sooner, "Cheaper" — the lowest customer price. "Best" weighs the price with delivery and the supplier's reliability by their score.

Why does the customer price differ from the price list? The price list is the supplier's cost. The customer price is the cost with delivery plus the markup of the customer's, branch's or organisation's price policy, with tax.

Why can't I see the cost and margin? Only staff with the permission to see cost can.

Where next

- "Counter" and "Orders" — sell or create a customer order.
- "What to order" in "Purchases" — order from the supplier.

Purchase

Markups

In short

Pricing policies: which cost the retail price is calculated from, markup rules (by supplier, brand, product type and cost range), rounding and what to do when goods arrive at a new cost. Below — where each policy applies.

Why it matters

- Give a retail price to products that have no price of their own, as a markup on cost.
- Use different markups for cheap and expensive parts, for brands and for suppliers.
- Give a point of sale or a customer its own policy.

Who can

A branch manager with the "Markups" permission at organisation level, and the administrator.

How to do it

1. **Create a policy.** "New policy" → name (for example, "Retail") → "Cost basis": from the last purchase cost, from the average cost, from the higher of the two or from the supplier price list.
2. **Rules.** "Rule" — conditions (supplier, brand, product type, cost from/to excluding VAT), markup in percent and "At least", the minimum markup as an amount. Rules are read top to bottom and the first matching one applies; "Move up" and "Move down" change the order. An empty condition matches any product.
3. **Rounding** of the price incl. VAT: to 0.05 €, to 0.10 €, to .95, to .99, to a whole euro or none.
4. **New purchase cost.** "Goods arrive at a new cost": suggest the new price (you decide on "Prices to review"), change automatically, or "if it rises, change now; if it falls, suggest". The threshold "Do not notify if the price changes by less than, %" hides small changes.
5. **Assign.** "Where the policy applies": default for the organisation or for a point of sale; for a customer — on the customer card. The most specific one applies: customer → point of sale → organisation. The sales channel's policy is chosen in the channel settings.
6. **Delivery for the buyer.** Tick a delivery class ("standard", "express", "pickup point") and choose "Price": at cost (the carrier's contract rate and surcharges), "cost + markup" (percent and "+ amount excl. tax") or "fixed price" incl. tax; "Rounding" of the price incl. tax — up; "Free from goods total" — goods total incl. tax. The class rule comes from the first policy that has it: customer → sales channel (without one, the channel customer's, e.g. a marketplace) → organisation; if none has it, at cost. A point of sale's policy does not affect the delivery price. To check the price: "Logistics" → "Delivery" → "Delivery for the buyer" → "Check selection".

Common messages

- **"No rules: the policy will not price anything."** — add at least one rule.
- **"not in the brand list — the rule will compare the brand as text"** — the brand is not in the brand list, so its synonyms are not used.

- **"Only the organisation manager or an administrator can change policies."** — you can only view them.

Questions and answers

A cost exactly on the limit: which rule applies? "Cost from" is included in the rule, "Cost up to" is not: the rule "from 10 to 50" matches costs from 10 € to 49.99 €, and a cost of 50 € goes to the next matching rule.

Does a customer's or a point of sale's policy apply to an item with its own retail price? Yes: a policy assigned to the customer or the point of sale prices the item even when it has a retail price; if none of its rules matches, the retail price stays. The organisation policy prices only items without a retail price.

What happens if no rule matches an item? The policy does not price it: an item with a retail price keeps it, an item without one gets no markup price. To avoid this, keep a rule with no conditions at the end: it matches any item.

Can rounding lower the price? No: the price incl. VAT is only rounded up, to 0.05 € or 0.10 €, to the nearest .95 or .99 ending not below the calculated price, or to a whole euro. With no rounding, the price is only brought to whole cents.

Where do I set the delivery price for the buyer? Here, in the "Delivery" rule of the right policy: the organisation's for all buyers, the sales channel's for its buyers, a customer's for that customer. What the buyer sees (classes, names, carrier) is in "Logistics" → "Delivery" → "Delivery for the buyer".

What happens if I deactivate a policy? Assignments with an inactive policy are skipped: the next one in the order customer → point of sale → organisation applies. In the policy list at the top of the page that policy is marked "inactive".

Where next

- "Prices to review" — new prices after goods arrive.
- The product card — its retail price.
- The customer card — the customer's own policy.

Prices to review

In short

What changed in prices after goods arrived. Three blocks: "Awaiting decision" — new prices by the markup rules; "Changed automatically" — prices the program has already changed; and "Received at a higher price than the supplier order" — differences from the order.

Why it matters

- Do not sell at a loss after a supplier raises prices.
- See which prices the program changed by itself and restore the previous one if needed.
- Notice that the supplier charged more than was ordered.

Who can

Decide on retail prices — someone with the "Markups" permission at organisation level (manager, administrator). The purchaser also sees the screen: the block "Received at a higher price than the supplier order" matters to them.

How to do it

1. **Awaiting decision.** The row shows cost before → now and current price → by rule. "Accept" sets the new price, "Keep as is" keeps the current one; "Accept all" for the whole list.
2. **Changed automatically.** "Got it" marks it as seen; "Restore previous price" undoes the change.
3. **Received at a higher price.** Ask the supplier why the price is higher and press "Checked".
4. **Recalculate by rules** — check every product against the current markup rules (for example, after editing a policy).

Common messages

- **"Currently sold at a loss"** — the retail price is below cost: accept the new price.
- **"Minimum allowed: …"** — the rule does not allow a lower price.
- **"The price was changed again after this change…"** — it is not restored, so a newer price is not overwritten.
- The price changes only when your own stock is replenished: goods received for a customer order do not change prices.

Questions and answers

Why did a new item get a price without my decision? For an item with no retail price, the first receipt into your own stock sets the price by the rule straight away: it shows in "Changed automatically" as "First price". It has no "Restore previous price" button because there was no previous price; you can change it on the product card.

Does "Recalculate by rules" change prices straight away? No: whatever the policy mode, the recalculation only puts into "Awaiting decision" the items with a retail price whose price by rule differs by more than the threshold. If the organisation has no active policy: "The organisation has no active pricing policy: assign one on the “Markups” page."

Why didn't a new purchase cost appear in "Awaiting decision"? This happens if the goods came in

for a customer order, if it is opening stock, if the cost is the same as in the previous receipt, if the price by rule differs from the current one by less than the threshold "Do not notify if the price changes by less than, %", if no rule matches, or if the organisation has no active policy. If the policy changes the price straight away, the new price is already in "Changed automatically".

Why don't I have the "Accept" and "Restore previous price" buttons? The retail price belongs to the whole organisation: only an employee with the "Markups" permission at organisation level decides. With the permission in one branch you see the records for that branch's receipts, but without the decision buttons.

What does "Checked" change in the "Received at a higher price than the supplier order" block? It only removes the line from the list: neither the retail price nor the price in the customer order changes. It is pressed by the purchaser or the branch manager, who handle supplier orders.

Where next

- "Markups" — the rules and what to do with a new price.
- The supplier order — the price ordered.

Purchases

In short

Everything about suppliers: what needs ordering, supplier orders, their invoices, debts to suppliers and expenses, and returns to suppliers.

Why it matters

- Never forget to order parts that repair orders and customer orders are waiting for.
- Match a supplier invoice against what was ordered and received, and pay it on time.

Who can

Supplier orders and invoices are handled by purchasing and the branch manager; payments by finance. No tab means no permission for that kind of document.

How to do it

1. **What to order.** "What to order" tab: parts that repair orders and customer orders are waiting for and that have not been ordered yet. Tick what you need → "Order selected" — a supplier order is created. The "Best with delivery" column shows up to three suppliers from price lists with the price and delivery per unit: by the supplier's delivery rule or by its delivery share over 90 days; "≈" is an estimate.
2. **Supplier order.** "Supplier orders": order statuses; "Awaiting delivery" — what has not arrived yet. An order can be printed or emailed to the supplier from its card.
3. **Supplier invoice.** "Supplier invoices" → "Record invoice" — or check the electronic and scanned invoices received under "Invoices to review". The program flags differences from the goods receipt.
4. **Pay.** "Debts and expenses" → the "Pay" button on the supplier's row. Under "Supplier invoices", the "To pay" and "Disputed" filters show what to pay and what is disputed; an invoice with differences can be marked disputed.

5. **Return to a supplier.** "Returns to suppliers" — faulty or wrongly delivered goods.

Waiting on external suppliers. The “Waiting on external” tab lists the orders placed with “Find manually” (suppliers without a price list or connection will not report a delay themselves): which customer order they are for, when they are expected, whether they have shipped and how much has been paid. Overdue ones come first: call them first.

Common messages

- **"Everything the orders are waiting for is already ordered or in stock."** — nothing to order.
- **"with difference"** on an invoice — price or quantity does not match the receipt; check the lines.
- **"Overdue"** — the invoice's payment date has passed.

Questions and answers

How do I order a part for stock, without a customer order? On the "What to order" tab, the "Stock order" button opens an empty supplier order; add lines with "Line for stock". In the order these lines are marked "to stock".

Why is a part from a repair order missing from "What to order"? The list takes the parts of the approved estimate of repair orders and of posted customer orders, minus what is already reserved for that order and what has already been ordered from a supplier. While the estimate is not approved, the part is reserved or the repair order is already delivered, closed or cancelled, it is not on the list.

Can I order the selected parts from different suppliers? One order is for one supplier. "Order selected" fills in the supplier if the selected lines have the same "On order from …" (chosen in "Sourcing"; price from its price-list warehouse) or, if there is none, the same "Last supplier" (lines without one do not count); otherwise choose it in the order window. Select the parts for another supplier and order them in a separate order.

Where did an order go from "Supplier orders"? The "Awaiting delivery" filter shows only what has not arrived yet: fully received orders, orders closed with a shortfall and cancelled orders are not shown. Switch to "All".

What does "better than the last one" mean in the "Best with delivery" column? The best offer including delivery is from another supplier, not the one the item was last bought from ("Last supplier" column). The last supplier is also on the list, further down, with its price.

Where next

- "Warehouse" → "Goods receipt" — receiving what was ordered.
- "Price lists" — who has the part and where it is cheaper.
- "Documents and finance" — cash desk, bank and expenses.

Supplier invoice

In short

One incoming invoice: lines linked to the goods receipt with its receipt price, the total on the paper invoice against the sum of the lines, where the price difference went, payments and the balance due, and a dispute with the supplier.

Why it matters

- Make sure you pay for what you received, at the agreed price.
- See the due date and what is still owed on the invoice.

Who can

Handling the invoice and the dispute: purchasing, finance and the branch manager; paying: finance and the branch manager.

How to do it

1. **Check.** Compare "Price" and "Receipt price" on the lines, and the "Total on the paper invoice" with the sum by lines. If the total does not match, the explanation of the difference is on the invoice.
2. **Price difference.** The "Price difference with the receipt" line shows how much went to stock cost and how much as "purchase price variance" (the goods were already sold).
3. **Pay.** "Pay" → amount and method. Payments are under "Payments"; "Outstanding" is in the header.
4. **Dispute.** Wrong price, quantity or goods: "Disputed" → "What is wrong" → "Mark as disputed". While the dispute is open, the invoice will not be paid. Once settled: "Close the dispute" and "How it was resolved".
5. **Supplier from abroad.** An invoice from another EU country or from outside the EU comes without VAT: we self-assess the tax and deduct it at the same time. The "Self-assessed VAT" line shows the amount and the kind: intra-EU acquisition of goods, a service from an EU or non-EU company; goods from outside the EU are an import and the VAT is paid on the customs DUA. The supplier is paid without tax; the self-assessment goes into the received invoices book for the gestor. If the service was performed before the invoice (a monthly summary invoice), enter the "Operation date", the last day of the period: the tax goes to that period, month or quarter (art. 75.Uno.1º LIVA). Paid before the service: the payment date. Subscriptions and rentals (tax due at each payment date): leave it empty. VAT-exempt banking and payment services (art. 20.Uno.18º, as confirmed by the gestor): line category "Banking and payment services (VAT-exempt)", no self-assessment.

Goods in transit, delivery and advances. In the invoice form, the “Goods in transit (by shipment)” section lists shipment lines without a receipt; the delivery line lets you pick the supplier order, so the delivery goes into the cost of its goods. An advance paid to the supplier before the invoice is taken when the invoice is posted: under “Payments” it shows as “Advance on order …” or “Advance from payment …”.

Common messages

- **"overdue"** — the due date has passed.
- **"disputed"** — payment is on hold until the dispute is closed. The debt does not change: it is corrected with a supplier credit note or a return.

- **"opening debt"** — a debt to the supplier carried over when you started using the program.

Questions and answers

Can I pay an invoice in instalments? Yes: in the payment window enter less than the outstanding amount in "Paying"; the outstanding amount in the invoice header goes down. You cannot pay more than is outstanding: "Invoice … has … outstanding: you cannot pay more."

Can one payment settle several invoices? Yes. The "Supplier payment" window lists all unpaid invoices of this supplier except disputed ones: tick the ones you need and check the amounts in "Paying". The invoice you opened the window from is already ticked.

Why is "Post payment" disabled when paying by bank transfer? The supplier's bank account is new or changed and not yet confirmed: "The account is new or changed: the payment can be posted after a manager or finance confirms it (in the supplier card)." It is confirmed ("Confirm" next to the account in the supplier card) by finance, the branch manager or the administrator, and not by the employee who added or changed it.

Can I pay the supplier in cash? Yes, with the "Cash" method and only from a cash desk. The program will not pay out more cash than the cash desk holds, nor more than the cash limit per transaction (together with cash already paid on this invoice): in that case pay by transfer.

How do I correct a posted invoice? A posted invoice is not edited: cancel it ("Finance" → "Documents" → open the invoice → "Cancel document", with the reason) and record it again. If it already has payments, cancel them first: "The invoice has payments: cancel them first."

Where next

- The receipt number is in the "Goods receipt" column; the supplier order is in "Purchases".
- "Purchases" → "Debts and expenses" — all debts to suppliers.

Supplier invoice review

In short

A supplier invoice that was sent in or scanned: the scan or file on the left, the fields and lines read from it on the right. From it the program creates the goods receipt (for goods not yet in stock) and the supplier invoice — after you check it.

Why it matters

- No retyping: fields are read from the e-invoice or recognised from the scan.
- Catch mistakes before posting: the program checks amounts, tax and duplicates itself.

Who can

Receiving goods: the storekeeper and the branch manager; creating the invoice: purchasing, finance and the manager; receipt and invoice at once: the branch manager (both permissions are needed). Scan recognition is paid (the cost is shown above the fields); there is no "Recognise" button until the administrator enables the "Invoice recognition (AI)" module and connects an AI model in "Connections" (the "Document recognition" block). Supplier invoice sources are set up and run by whoever handles supplier invoices: purchasing, finance, the branch manager.

How to do it

1. **Recognise.** Photos and PDFs are recognised automatically right after upload, one invoice at a time (also in batches); by hand — "Recognise", an already recognised one — "Recognise again" (at most once a minute: a repeat is not paid). The program checks the buyer (invoice not to your organisation, your own invoice), a VAT number without a country code, a 0 % rate, an unprinted discount and a zero line amount; delivery and rent lines become expenses. A draft already filled in by hand is not overwritten automatically. Several pages — "Another page". An e-invoice (Facturae, UBL) is read from the file exactly, without recognition. With several models connected, "Compare with model" → "Compare": the same scan by another model, the draft unchanged; you see which fields were read differently and what it cost. If it is better — "Recognise with this model" (its answer replaces the draft). Spend on a scan adds up: repeats and comparisons count towards the monthly limit.
2. **Check the header.** Supplier (not in the system — "Create supplier"), "Supplier invoice number", "Invoice date", "Due date", "Total on the paper invoice", "Receiving warehouse".
3. **Check the lines.** For each line, the "Type": product (find the card; the program remembers the choice for this supplier), delivery or expense with its category, or "ignore". A line is missing — "Add line". **Brand dealer.** In the supplier card ("Supplier's terms for us") set "Brand on their invoices" (for example, Mercedes-Benz): lines of their invoices without a brand are matched among this brand's parts. A Mercedes-Benz dealer number with a service letter ("MA211 832 85 94") is read as A2118328594, and the dealer system code before the description ("036689/FILTRO ACEITE") is removed.
4. **Fix the warnings.** The "What to fill in" and "What to check" blocks show what does not add up.
5. **Create the documents.** "Create receipt and invoice" (or "Receive goods" / "Create invoice"). Goods already received without an invoice are linked to that receipt automatically. Wrong invoice — "Reject" → reason.

Credit note: supplier return

A supplier's corrective invoice for returned goods (abono, factura rectificativa, negative amounts) is not a goods receipt but a supplier return. Recognition ticks "This is a credit note: supplier return" by itself (you can switch it by hand); the draft shows the amounts without the minus sign.

- **The goods were already returned in the program** ("Purchases" → "Returns to suppliers"): pick that return in "Return already recorded?"; the credit note gives it its number and stock does not change.
- **No return yet**: choose the product in the lines and the "Return warehouse", then "Create supplier return"; the goods leave the warehouse, the debt to the supplier goes down, and the credit note number goes into the return and the gestor export.
- A credit note for a discount, delivery or service (no goods) is entered by hand for now.

Invoices that arrive by themselves

You do not have to upload supplier invoices by hand: the program can collect them from the supplier's server or API and put them into "Invoices to review".

1. "Purchases" → "Invoices to review" → the "Supplier invoice sources" block → "Add source".
2. Choose the supplier and where the invoices come from:

- **"Files from the supplier's server"**: FTP (ticked "FTPS (TLS)" — protected), SFTP or "Link (HTTP)". Enter "Server", "Port", "Folder", "User", "Password" and "File name patterns" (for example *.xml, *.pdf; zip and gz archives are unpacked). "Check the connection" shows the files in the folder.
- **"Supplier API"**: invoices through the API (Auto Partner for now). The credentials are taken from this supplier's price list source in "Price lists" — there is nothing to enter separately.

1. "Schedule": "At set times" or "Every N minutes"; "Manually only" — only with the "Fetch now" button.
2. "Save". New invoices appear in the queue by themselves.

After that it is the same as an uploaded invoice: an e-invoice (Facturae, UBL, CII) is read straight away; PDFs and photos are recognised if "Invoice recognition (AI)" is on, otherwise the fields are filled in by hand next to the scan; an invoice from the API arrives with its lines and, if the supplier provides it, with the PDF. You create the documents as usual.

- **No repeats.** A file or invoice already collected does not enter the queue a second time, even if you rejected it. An invoice whose number is already recorded for this supplier is not added either.
- **Old files.** Right after saving, the program collects the folder for the first time: files that were there before the source was created are only marked as collected, and only new ones reach the queue. If you want the old ones too, tick "Collect old files too" before saving. The same happens when you change the server, port, folder or patterns; changing the protection (FTPS), the server key or the password does not affect it. A file the supplier has only just put there (less than 3 minutes old) is collected on the next run; a file overwritten under the same name with a different size counts as new. A file that is too large or a damaged archive is skipped ("not invoices"); a slow one is retried up to five times; the other files are collected. "Fetch now" — at most once a minute.
- **Errors are visible.** The source row shows the last download and the error, for example "The server did not accept the user or password". After a wrong password or address, or three failures in a row, the source stops ("No longer fetches on its own…"): fix the settings and "Save", or press "Fetch now".

- The password is stored encrypted and is never shown again. If the server changes, enter the password again.
- The program never sends a receipt confirmation for invoices to Auto Partner on its own.

Common messages

- **"The model is unsure about: …"** — compare these fields with the scan especially carefully.
- **"Reason for the total difference"** — the sum of the lines differs from the printed total: fix the lines or give the reason.
- **"Why this is not a duplicate"** — this supplier already has such an invoice: make sure it is not entered twice.
- **"This month’s recognition spending limit is used up…"** — fill in the fields by hand or ask the administrator to raise the limit.
- **"The recognition service did not respond…"** — try again or fill in the fields from the scan yourself.

Questions and answers

Can I upload the same file again? No: the program recognises the same file and replies "This file is already uploaded: “…”." It can be uploaded again only if the earlier invoice from that file was rejected.

An invoice with several pages: how do I upload it? Upload a photo of the first page and add the rest with "Another page", up to 10 pages in total. Pages can only be added to a photographed invoice, and only as photos; a PDF or an electronic invoice is uploaded as a single file.

Is an invoice in another currency accepted? The invoice must be in the organisation's currency; otherwise "What to fill in" shows "Invoice in …: only invoices in the organisation's currency (…) are accepted for now." In a Polish organisation a regular invoice (not a credit note) is accepted: the amounts are converted to zloty at the NBP rate when the documents are created.

Why is there no "Reject" button? If goods from the invoice have already been received, it cannot be rejected: finish it with "Create invoice". An invoice that is already processed cannot be rejected either.

How do I teach the program the supplier's item codes? The program remembers the item you pick on a line for that supplier by itself when it creates the documents. To avoid matching lines one by one, the "Invoices to review" tab has "Supplier codes": a table "supplier code (or line text) → our product by EAN or brand and part number, or an expense category"; lines of this supplier's next invoices will be matched automatically.

Can supplier invoices arrive automatically? Yes: add a source in the "Supplier invoice sources" block — the supplier's server (FTP, SFTP, link) or its API. New invoices will arrive in the queue by themselves, on schedule and without repeats (the "Invoices that arrive by themselves" section).

Where next

- "Purchases" → "Invoices to review" — the queue of incoming invoices.
- The created receipt and invoice — from the links after creation.

Supplier order

In short

One order to a supplier: what was ordered, what has been received and what has not, line by line; receipts and invoices for the order; and whether the order was sent to the supplier.

Why it matters

- See what is still on its way and what the supplier did not deliver.
- Receive the order so that parts are reserved for customer orders straight away.

Who can

Managing and sending the order: purchasing and the branch manager; receiving: the storekeeper and the branch manager; recording the invoice: purchasing, finance and the branch manager. No button means no permission.

How to do it

1. **Send to the supplier.** "Print" — the order PDF; "Send to supplier" — an e-mail with the PDF attached (the reply goes to the organisation's e-mail). If you sent it another way, mark it "Sent to supplier". With a supplier whose ordering API is connected (E-MOTO): "Send via API" — lines go one by one and you see how much was accepted; whatever was not accepted goes back to "What to order". "Unknown" — the connection dropped: check with the supplier first, then "Resend the 'unknown' lines" (a repeat creates a second order).
2. **Receive the delivery.** "Receive delivery" → supplier document number, quantity and price per line → "To receiving": the receipt awaits scanning in "Warehouse" → "Receiving", and the order shows that quantity as "being received". After "Finish receiving" accepted goods go into stock, and for a line tied to an order they are reserved for it at once; goods not accepted carry a reason. Without a scanner (if the organisation allows it): "Accept now manually".
3. **Invoice.** "Record invoice" (after the first receipt) — the supplier invoice for this order.
4. **Close a shortfall.** If you no longer expect the rest, "Close shortfall" with the reason. Parts for customer orders will reappear in "What to order".

Shipments, delivery and paying before the invoice. “Record shipment”: date and tracking number; the shipment date sets the tax date of an EU purchase, and the invoice can be entered against the shipment while the goods are in transit. The “Delivery to us” block shows the delivery in the order, in invoices and in stock cost. “Paid to supplier”: a payment before the invoice (online card, transfer, till) first pays the order's invoices already posted, then becomes an advance on the order, anything above the expected amount a supplier advance; the order's invoice takes the advance by itself.

Delivery by the supplier's rule. If the supplier card (“As supplier” → “Delivery to us”) has a rule — included in the price, an amount per shipment, per kilo or by weight steps — the new order window works out the delivery itself and shows how much is left until free delivery. The delivery goes into stock cost on receipt; per kilo and by weight steps it is split between items by weight, otherwise by amount. The supplier's invoice refines the estimate without an explanation if the difference is at most a quarter of the estimate (and at least 5 €); a larger one needs an explanation. Until the first receipt the delivery can be changed with “Change delivery”. If the supplier does not charge delivery on the invoice, add a delivery line of 0 to the order (the “No delivery on …” button in the invoice window), otherwise the estimate stays

in cost. When the invoice refines the estimate, the invoice window shows “estimate …, invoice …”.

Offer from the price list. If the order's supplier has a price list, each line in the order window has a “From the supplier's price list” column: its warehouses with stock, price, lead time and delivery per unit. Picking one sets the price, and the price-list warehouse selects that warehouse's delivery rule (in the supplier card a rule can be set for a price list and warehouse); the unit weight comes from the price list. A line without a price takes the best offer with delivery by itself; a price already entered is not changed.

Direct supply via the Auto Partner API

A storefront order with a “direct supply” line (the supplier ships to the buyer) is ordered from the supplier once it is paid: in the customer order card, “Direct supply” block → **“Order from supplier (direct supply)”**; the program creates a supplier order on the branch's “Direct supply” warehouse. Not before payment: a shipped parcel cannot be recalled.

The card of that supplier order shows the “Direct supply via the Auto Partner API” block and the **“Send via the Auto Partner API”** button. In the window: the carrier (by default the first one in the supplier's terms) and, if the buyer chose a pickup point or parcel locker, its code. First the program checks that all lines are in stock at Auto Partner; if something is missing, the order is not sent. The recipient is the customer order's delivery address (without it, the customer's address); the postcode is checked before sending (Poland: 00-000). The order number at the supplier is our supplier order number, and the comment is that number only.

There is no button and the block shows the reason if: the supplier has no “Data processing terms signed” date (GDPR art. 28), the customer order is not paid, the buyer's country is not among the “Shipping countries”, the postcode is not in the country's format, the Auto Partner code is missing from its price list, or the order has already been sent.

After that the program asks Auto Partner for the status at most every 15 minutes: “registered”, “in progress”, “waiting for the courier”, “loaded” — visible in the customer order. **“Shipped” with a parcel number**: the program records “Shipped by supplier” by itself (a receipt on the “Direct supply” warehouse and an issue to the buyer with the carrier and number); the number appears on the buyer's order page and goes to Allegro (several parcels — all of them). **“Cancelled”**: the supplier order is closed as short-delivered and the customer order goes to “Orders” → “Awaiting decision”.

Checks stopped. If “Shipped by supplier” was not recorded (the parcel is already with the buyer), the supplier has not reported shipping for more than 30 days, or it has other lines under our number, the program stops asking for the status, the customer order goes to “Awaiting decision” with its own text, and neither the supplier order nor the customer order can be closed or cancelled. In the supplier order: “Check again” (checks resume) and, if the record failed, “Record again” once the reason is fixed. If the supplier has someone else's order under our number and not ours, the supplier order can be closed (short delivery) and the line ordered again.

The buyer's email goes to the supplier only if the carrier needs it: InPost or a pickup point (locker notice); otherwise no email is sent.

If the supplier does not answer, the program first looks the order up by number and, if it is not there, retries once (the same number does not create a second order; a found order is checked against our lines); if there is still no answer, it shows “no answer” and finds the order by its number later. If the supplier refuses, the reason is shown with its code (for example, “07/07: not everything is in stock”) and the order can be sent again. The buyer's address and phone go only to the supplier: they are not in the action log or in errors. Whether direct supply is enabled for the account is shown by “Check the connection” in the Auto Partner price source.

Common messages

- **"The supplier card has no email: enter the address."** — type it in the e-mail window or on the supplier card.
- **"Received beyond the order"** — more arrived than was ordered: check the delivery note.
- **"discrepancies: N"** on a receipt — something was not accepted or the price differs.

Questions and answers

Can a delivery be received in parts? Yes. "Receive delivery" is available while anything is still pending on at least one line; each receipt is a separate goods receipt in the "Receipts" block, and the "Pending" column goes down. Goods not accepted with a reason stay in "Pending" until they arrive or the shortfall is closed.

Why don't I have the "Receive delivery" button? Receipts are posted by the storekeeper and the branch manager: the purchaser does not have that permission. The button is also missing when everything has been received or the order was closed with a shortfall.

How do I cancel a supplier order? "Finance" → "Documents" → open the order → "Cancel document" and give the reason. If the order already has receipts, the program replies "The order already has receipts: cancel them or close the shortfall."; if an advance was paid, first cancel the payment or apply the advance to an invoice.

How do I remove a shipment recorded by mistake? In the "Supplier shipments" block each line has a "Cancel shipment" button (the bin). It is there while nothing from that shipment has arrived and there is no invoice; otherwise cancel the receipt or the invoice first.

What does "The debt to the supplier is close to their credit limit" mean? Our debt to this supplier together with the order amount has reached 90 % of the limit in the supplier card ("Supplier credit limit"); "The debt to the supplier exceeds their credit limit" means the limit is exceeded. It is only a warning: the order is sent and received as usual.

Where next

- "Purchases" → "What to order" — parts customers are waiting for.
- Supplier invoice — check prices and pay.

Supplier price lists

In short

This is where wholesalers' price lists come together: prices, stock in their warehouses and delivery times. The program reads the suppliers' files, recognises the brand and part number and shows every offer for the same part side by side, cheapest first.

Why it matters

- Find quickly who has a part and at what price, without opening suppliers' websites.
- See the purchase price in euros even when the list is in zlotys or crowns.
- Send your prices and stock to sales channels and the online shop.

Who can

Reception, sales, finance, purchasing and the branch manager can view offers. Sources, loads, rates and brands: purchasing and the branch manager. No button means no permission: ask your administrator.

How to do it

1. **Find a part.** "Search offers" tab → type the part number in any spelling (0986494294, 0 986 494 294), the EAN or the supplier code → suppliers' offers with unit price and lead time.
2. **Connect a supplier.** "Sources" tab → "New source" → code and name → price list format (a ready-made one or "custom", which opens the builder from a sample file) → how it arrives (manual, FTP, SFTP, link) and schedule. "Check the connection" signs in to the server and shows which files it sees (nothing is downloaded); saving a new server or password runs the check by itself, and if it fails you see why and "Save without checking". The same applies to the supplier API (Auto Partner).
3. **Upload a price list by hand.** Open the source → "Upload files" → pick the files → "Send for processing".
4. **Check a load.** "Loads" tab: how many offers, new, changed, gone and parsing errors.
5. **Set an exchange rate.** On the "Sources" tab, in "Exchange rates to euro", choose the currency, enter how many euros one unit is worth and save — prices are recalculated.
6. **Match brands.** "Brands" tab: brand spellings the program did not recognise — pick an existing brand or create a new one. The decision applies to all price lists. A new brand also appears in the stock brand reference ("Product catalogue → Reference data → Brands") if you may manage the product catalogue. Price-list brands with a TecDoc number get there on their own, together with their other spellings; a price list never renames a brand in the stock reference.
7. **Resolve product card discrepancies.** "Loads" tab → "Cards" column → in the window, the list "the card says one thing, the price list another" (weight, dimensions, an EAN already on another product). On each row: "Take from price list", "Move EAN here" or "Keep as is". The decision is remembered; "Search the web" helps to check by brand and article or by EAN.
8. **Photos from the price list.** In the format builder, the column with photo links ("Foto", "Image", "Zdjęcie"…) goes to the "Photo (link)" field by itself; up to three columns: "Photo 2", "Photo 3"; a cell may hold several links separated by ";". Photos are downloaded in the background for the products linked to the offer; a new upload adds only new links. Progress and errors: "Product catalogue → Data quality → Photo".

9. **Product type.** The type column ("Tipo pieza", "Familia", "Rodzaj towaru"…) goes to the "Product type" field. It fills an empty card type from the product types list (the same spelling, ignoring case, is the same type), and a markup rule "by type" also applies to on-order goods.
10. **Name the people responsible for the price list.** Open the source → "General" → "Responsible for the price list". If a load fails, is waiting for review (quarantine), stock has not been updated for a long time or new brands appear in the queue, they see a badge on "Price lists" and, at the top of the screen, a "Needs attention" list. "Acknowledged" removes the badge; if things get worse (for example, more new brands), the alert comes back. If nobody is selected, everyone who manages price lists sees the alert. "Stock outdated after, days" — after how many days without new stock to send an alert; from then on the source's offers are not sold (they are left out of the search, "What to order" and channel exports) and the source list shows "Stock outdated". Once a file with stock arrives, they are sold again.
11. **Fetch stock and prices at different times.** Open the source → "Retrieval and schedule" → "Own schedule for the files of the set". For example, stock every 60 minutes and prices at 06:00 and 14:00. Each file is fetched on its own schedule; the program takes the other files of the set from the last load. "Same as main" follows the general schedule.
12. **Link an item to a product by hand.** Open the source → "Manual matching": these are the items the program did not recognise by brand and number. "Link to product" → find the product → "Link". The link works right away and on every future load. For many items use "Upload a file": download the template, fill in the supplier code and the EAN (or brand and article), check and apply.
13. **Do not order what the supplier does not have.** Open the source → "General" → "Do not order items out of stock". Then lines the supplier has no stock for are not sent in the API order (the program shows which were not sent), and in "What to order" the "On order from" mark for that supplier becomes "out of stock" and is not used in the order.
14. **Do not load what you do not need.** Open the source → "Load rules" → "Do not load": brands; "no originals" or "originals only"; discontinued items (a custom price-list field and its values, for example "EOL"); a minimum price; items already present in another source of the same supplier; individual "brand + number" items, one by one or from a file. Rules apply from the next load, full or partial: an item dropped by a rule becomes unavailable. In "Loads", under the number of offers you see "not loaded: N"; hover to see which rule. "Present in another source" means the item is there with stock or "on request". The "discontinued" and "discount group" fields are custom price-list fields: map them to columns in the "Parsing profile".
15. **Adjust quantity and price.** On the same tab, "Quantity and price adjustments". "Stock factor" 0.5 takes half of the stock (rounded down); offers show the quantity with "≈" and the supplier rating says "Stock not exact". "Price factor" applies to the whole list. "Discount group": choose the custom price-list field with the group and fill in the group table (code → multiplier, for example A1 → 0.62) by hand or from a file; a group missing from the table uses the "Multiplier for unknown groups". The list price before adjustments is shown in the offer. After changing the price factor or the groups, the next load may go to review (price jump): check it and press "Apply anyway".
16. **Lead times by weekday and order time.** Source → "Supplier warehouses" → "Lead times by weekday and order time": the cut-off time (for example, 14:00) and, for each day, how many days to add to the warehouse lead time in working days, when ordering before and after it. By default, after the cut-off +1 working day: Friday after 14:00 — prepared on Monday; weekends and national holidays are skipped automatically. The time is in the time zone of the organisation's branch. The adjusted lead time shows in "Sourcing", "What to order" and the supplier order ("order before 14:00 — arrives Thu, 19/11"), in channel exports and on the website. In an export file the lead time is as of

the moment the file was generated.

Common messages

- **"Quarantine"** on a load — the file looks wrong (far fewer rows, price jumps, many errors). Previous prices are untouched. Check the file; if it is right, press "Apply anyway".
- **Fetch error** under a source (e.g. "folder not found" or "wrong login") — check the address, folder and access at the supplier, then press "Fetch now".
- **Parsing errors** — click the number in the "Errors" column to see the file line and the reason.
- **"Needs attention"** at the top of the screen — alerts about sources: a failed load, quarantine, outdated stock, new brands. A failure or quarantine clears once a load is applied: the next correct file or "Apply anyway" on the "Loads" tab (after checking the file). New brands clear once matched on the "Brands" tab; outdated stock — with a fresh stock file.

Questions and answers

What format is accepted for a price list? An Excel sheet (XLSX) or a delimited text file (CSV, TXT); the program unpacks ZIP and GZ archives by itself. The columns are mapped by the price list format, a ready-made one or your own, set up from a sample file.

What happens to items missing from the new price list? It depends on the source setting "The price list arrives": "Complete — missing items become unavailable", with their stock set to zero; "Changes only" — items not in the file stay as they were.

Can I change when a price list goes into quarantine? Yes: "Sources" tab → click the source → the "Protection against faulty price lists (quarantine)" block: "Fewer rows, %" (30 by default), "Parsing errors, %" (5) and the pair "Price jump, %" (50) and "…for this share of items, %" (20).

Why does a price list item have no product card? It is set by the source setting "Product cards are created": "When the product is needed", "Never — manually only", "For selected brands" or "Immediately for all identified". Only someone with permission to manage the product catalogue can choose the last two options.

Who finds out that a price list did not load? The people responsible for the price list set in the source — they see a badge on "Price lists". If there are none, everyone who manages price lists. The same failure does not repeat as new alerts: it stays one alert until it is fixed.

How do I link a price list item to a product if the program did not recognise it? Source → "Manual matching" → "Link to product". The link is remembered: on the next loads the item goes straight to that product.

Where next

- Product card → "Suppliers" tab: offers for that product.
- "Markups" — how the selling price is derived from the purchase price.
- Customer card → "Sales channels": sending prices and stock to that customer.

Supplier rating

In short

Each supplier's score from 0 to 100 for the chosen period, for your company or the whole group. Next to it — "Why it is lower" and the main indicators: purchases, real cost, on time, fill rate, defects, claims and price-list freshness. Problem suppliers come first.

Why it matters

- See who costs more than the price list suggests: delivery, defects and invoice differences.
- Notice who is late, does not bring everything that was "in stock", or has an outdated price list.
- Decide whom to order from on facts, not impressions.

Who can

Purchaser, finance, branch manager and administrator. Someone with a role in one branch sees only that branch's documents. Amounts are visible only with permission to see costs.

How to do it

1. **Period and scope.** At the top: 30, 90, 180 or 365 days and "This company / Whole group" (if you have several companies).
2. **Score.** Green from 80, yellow 60–79, red below 60. "Not enough data" — fewer than 20 received lines in the period.
3. **Why it is lower.** Below the score — the 2–3 groups that lowered it most, with figures.
4. **In detail.** Click a supplier to open the "Rating" tab of its card: six groups (money, price, on time, fill rate, quality, price list), the warehouse lead-time hint and the score by month.
5. **Warehouse lead time.** If goods from a supplier's warehouse actually take longer than the price list says, a "Fix the lead time" hint appears and leads to the price-list settings.

“Delivery” tab

Visible to those who can see cost. Per supplier for the period: how many orders had delivery by the rule, entered by hand or none; how much delivery was in the orders and how much was invoiced (only orders that already have an invoice with delivery); the difference and the delivery share of goods. “Rule was off” lists orders with delivery by the rule whose invoice differs from the estimate by more than a quarter (and at least 5) or where the supplier did not charge delivery; the order number opens it. If it is often off, fix the rule in the supplier card (“As supplier” → “Delivery to us”).

“Need attention” signals

Once a day the program checks suppliers and shows at the top of the screen and in the card's “Rating” tab who got worse: late lines over 30 days, an outdated price list, a claim without an answer or past its deadline, a score drop, stock accuracy, defects. The number of open signals is the badge next to “Suppliers” in the menu. “Mark as noted” removes a signal from the counter; it comes back if things get worse or after 14 days. When the figure recovers, the signal closes by itself and does not reopen for 7 days. Thresholds are changed by the branch manager or the administrator with the “Signal thresholds” button. The same window sets the weekly email summary: on Mondays at 08:40, an email with the signals and the five lowest scores; recipients (by default the organisation's email) and language.

Common messages

- **"not enough data"** — fewer than 20 lines arrived from the supplier in the period: choose a longer period.
- **"Lead time and stock data since …"** — overpaying and "in stock" are only known for orders posted after the update.
- **"No exchange rate on the date — lines left out"** — there is no ECB rate for the date of a document in another currency.

Questions and answers

Why does a supplier show "not enough data" with more than 20 lines? The score is shown only if at least three groups have data and their combined weight is at least 50 out of 100. A group without data does not count: for example, "On time" and "Fill rate" need at least 10 lines, and price at least 5.

How is the score made up from the groups? Each group gives 0 to 100 points, and the total is a weighted average: price, on time and fill rate weigh 20 each; money and quality 15 each; price list 10. Groups without data are left out and the weights of the others are recalculated.

What counts as late? A line arriving more than 1 day after what was promised. The promise is the warehouse lead time in the price list, counted from sending the order to the supplier, or, if there is none, the order's expected date; lines with neither are not part of the "On time" group.

Why does the "Price list" group lose points? A price list not updated for more than 3 days loses 10 points for each extra day; each load in quarantine during the period, 10; an error on the last fetch, 20. If the supplier has no connected price list, the group is not calculated.

Why can the score for past months differ from today's? In the score by month, past months have no "Price list" group and no overdue claims, because their state is known only as of today. A past month is calculated from the other indicators.

Where next

- Supplier card → "Rating" — details and trend, items bought only from this supplier.
- "Claims" — open and overdue supplier claims.
- "Price lists" — supplier warehouse lead times.

Warehouse

Core deposits

In short

The list of core deposits: starter motors, alternators, brake calipers and other parts sold with a deposit for the old part. The tabs "In progress", "Pending", "With us", "At supplier" and "All" show where the old part is now and who owes whom.

Why it matters

- Get the old part back from the customer on time and refund their deposit.
- Send old parts to the supplier and not forget to collect your own deposit from them.

Who can

View — service advisor, salesperson, purchaser, storekeeper, finance and branch manager. Mark receipt and dispatch — all of them except finance. Record the supplier's decision — purchaser and branch manager. Refund a deposit for a rejected part — branch manager only.

How to do it

1. **The deposit appears by itself** when a part with a core deposit is sold. The deadline for the customer to bring the old part is shown in the row ("until …").
2. **The customer brings the old part.** Button "Old part received from the customer".
3. **Send to the supplier.** Tick rows with "Select" → "Send to supplier (N)": supplier, supplier return number and supplier deposit per unit (the hint is the price from their price list).
4. **Supplier's answer.** "Supplier accepted the old part" — enter how much they refunded per unit; or "Supplier rejected" — a reason is required.
5. **Refund the customer.** "Refund the deposit to the customer" and how: in cash, to card, by transfer or against the debt. The money goes back with a customer return on the deposit line.
6. **The customer did not bring the part.** "Customer deadline passed" — the deposit stays with you.

Common messages

- **"overdue: N"** — this many customers are past the deadline to return the old part.
- **"no customer deposit (workshop)"** — the part was fitted in a repair and the customer paid no deposit; the old part still goes to the supplier.
- **"No core deposits"** — no part with a deposit has been sold yet.

Questions and answers

Why is there no "Deposit to customer" button? The deposit is refunded only after the supplier's answer: the button appears on a record "accepted by supplier" (on a rejected one, only for the branch manager). It is not there if the customer paid no deposit ("no customer deposit (workshop)") or for users who do not post customer returns: the salesperson, the branch manager and the administrator have it.

The supplier rejected the old part. Does the customer get the deposit back? As a rule, no: the

deposit stays with you. The branch manager (or the administrator) can still refund it with "Deposit to customer" and a mandatory reason; the money goes back to the customer through a customer return on the deposit line.

The customer returns the new part. What happens to the deposit? Record the customer return on the order together with the deposit line while the old part has not been handed in: the deposit is refunded with the part and the record becomes "part returned by customer". The deposit line alone cannot be returned this way: the program replies "The core deposit is refunded on the “Deposits” page once the supplier accepts the old part, or together with the return of the part itself."

What if the customer never brings the old part? The deadline is 30 days from when the part was handed over (in the row, "until …"). Once it has passed, the record shows the "overdue" label, but it does not close by itself: the "Expired" button closes it, and it is available to those who mark old parts as received and sent. After that the deposit stays with you and the record no longer changes. You cannot close it earlier: "The customer deadline has not passed yet (until …)."

Can I charge the customer a smaller deposit? The order adds the deposit line by itself at the retail price of the deposit item in the company. Only the branch manager or the administrator can lower that price or discount it; for everyone else the program puts the full deposit price back. If the deposit item has no retail price in the company, no deposit is charged on the order.

Where next

- "Documents" — the customer return used to refund the deposit.
- "Purchases" — suppliers and their price lists with the deposit price.

Product card

In short

Everything about a product, as in the TecDoc catalogue: brand and part number, photos, characteristics, OE numbers and equivalents, vehicle fitment, texts for the shop and marketplaces; plus price, stock, supplier offers, purchases, orders and movements.

Why it matters

- Make sure the part fits the customer's car, and find an equivalent if it is not in stock.
- See price, your stock and suppliers' stock, and the product's whole history in one place.

Who can

Viewing: anyone allowed to view the catalogue; editing: the edit catalogue permission. Purchase price and cost are only visible with the cost permission; the supplier and their document number in "Purchases" only to those who work with goods receipts, supplier claims or supplier returns. Permissions are checked in the branch of the warehouse or receipt; without one, price and supplier show "—" and the supplier's document number is not shown. No "Edit" button means no permission.

How to do it

1. **Change details.** "Edit" → name, brand, part number, codes, unit, package weight and dimensions → save. The part number, OE numbers, equivalents, replacements and EAN are stored in one spelling — Latin letters and digits only, upper case: "W 712/95" is saved as **W71295** (hint under the

field). The manufacturer's spelling is kept for reference, in small print under the part number ("manufacturer's spelling: W 712/95"); search finds either spelling. Supplier and internal codes stay as entered; a supplier order prints the supplier's code, or else the manufacturer's spelling.

2. **Equivalents and OE numbers.** "OE numbers and equivalents" tab — other brands' codes and original numbers; "Equivalents in catalogue" — what you can offer instead and whether it is in stock.
3. **Fitment.** "Vehicle fitment" tab — the makes and models the part fits.
4. **Photos and texts.** "Photos and documents" — photos (the first is the main one) and instructions; "Texts" — the description in the shop's languages. A product photo must be real: the buyer sees what they will receive. AI may only retouch a real photo (remove or replace the background, fix the lighting) if the product itself (colour, shape, markings) does not change: tick "Photo edited with AI (background, lighting)" before uploading or press the sparkles icon on the photo; the photo gets an "AI-edited" mark (not shown on the website; the photo is sent to Allegro with the AI mark, as Allegro requires under the EU AI Act). Placing the product in an AI-generated scene (a car, a workshop) is not allowed. An AI-generated image, or a file whose metadata says it contains AI-generated parts, is not accepted as a product photo: neither in the card, nor in a ZIP archive, nor from a supplier link. Allegro sets the AI mark only when a photo is uploaded: if you change the mark on a photo of a product that is already listed, the program warns you; fix the photo in the listing on Allegro itself (delete it and upload it again). Where to get photos: suppliers, the TecDoc catalogue, manufacturers or your own shots. For a used or refurbished item the photo shows this very unit and its real wear: AI must not "clean up" the part itself.
5. **Price and stock.** "Price" — the retail price and how it was calculated; "Stock" — by warehouse; "Suppliers" — offers from suppliers' price lists.
6. **History.** "Purchases", "Waiting orders" and "Movements" — where it came from, who is waiting for it and where it went.
7. **Safety.** For oils, fluids, chemicals and batteries — the "Safety" tab: whether the mixture is hazardous under CLP, pictograms, signal word, H and P statements from the safety data sheet (section 2.2), UFI and UN number for transport. Only H412, H413 or H362: no signal word or pictogram; EUH380–EUH451 (new hazard classes): signal word, no pictogram. Add the safety data sheet and technical data sheet as PDF in "Photos and documents" and set the type, language and revision date. In sections that require it, a product without a hazardous / not hazardous decision is not published on the website; on the website the buyer sees the pictograms, statements and a link to the sheet, and product lists show a hazardous mixture badge. The same sheet for another pack size (1 l, 4 l, 5 l): the "To other products" button of the document.
8. **For marketplaces.** "Edit" → "For marketplaces": short listing title, part quality, warranty and "Marketplace category" — by default the catalogue node's category ("Reference data → Marketplaces"); "Own category" — just for this product (for example, a kit); "Same as node" — go back. On Allegro the safety information follows the channel setting ("Allegro connection" → "List an item from stock"): by default files (a CLP label PDF in Polish with pictogram images and the safety data sheet in Polish, or English if there is none); or the label text only. A product without a label or data sheet sends the channel's "General text" (editable in the same place). If the product is not in the Allegro catalogue — "New product from the card" (for now only in the Allegro test environment): Polish name from the product texts, marketplace category, product parameters from "Reference data → Marketplaces" → "Parameters" and the product photos (at least one). Listing description — the product's own Allegro text in Polish, otherwise the Polish product description (empty line — new paragraph, lines "- …" — a list); the own Allegro title is used as the listing title. "Pasuje do" — vehicles from the product fitment (by TecDoc type — Allegro database vehicles) if the Allegro

category accepts the list. The fitment line condition is published as is — write it in Polish. All channel offers: Allegro channel → "Allegro offers": active, ended and inactive; "End", "Resume" (only with stock) and "Update from card": title, description, "Pasuje do" and VAT. VAT (Polish rate) is set only if sales to Poland are taxed with Polish VAT under OSS.

9. **Fitment in the online store.** A published product's page shows "Fits": make and model, version, years, power, engine code and the line condition (as is). The buyer finds parts on the search page: make → model and year → matching products (published only).

Common messages

- **"A product photo cannot be AI-generated…"** — the image is AI-generated (you chose it or the file says so). Upload a real photo of the product; AI images are only for decorating the website.
- **"The file metadata says the image contains AI-generated parts…"** — the editing program recorded in the file that it contains AI-generated parts; from that record alone, a background change cannot be told apart from a product placed in an AI-generated scene. Upload the original photo of the product.
- **No "Suppliers" tab** — you lack the price lists permission. "Suppliers (0)" — the product is not matched to price lists yet, or no supplier has it.

Questions and answers

Why is there no "Edit" or "New price" button? The purchaser, the branch manager and the administrator have them when their role applies to the whole company (or the whole installation). With a role for a single branch the card and the price cannot be changed and the buttons are not shown; the administrator assigns roles in "Users".

Can I backdate a price change? No: in "New price", "Valid from" is today or a later date; otherwise "The price cannot be backdated: use today or a future date." Each company has its own price, and documents already issued keep the price of their date: they do not change.

How do I sell a part with a core deposit? "Price" tab → "Core deposit" → "Set deposit": "New deposit" (name and "Customer deposit, € incl. tax") or "Pick existing" → "Save". When the part is sold, the order adds the deposit line by itself, and after the handover the record appears in "Deposits"; to remove the link, "Remove".

What does "Below minimum: …" under the retail price mean? The retail price is below the minimum allowed by the company's markup policy: cost plus the rule's minimum markup, with tax. Check the price ("New price") or the rules in "Markups".

Why does the product have no "Vehicle fitment" tab? "Vehicle fitment" is switched off in its category (or higher up the tree) and the product has no vehicles. The administrator changes it in "Product catalogue" → "Reference data" → "Categories".

Where next

- "Warehouse" — stock and movement documents.
- "Price lists" — supplier offers for this part number.
- "Online store" — publishing the product in the storefront.

Warehouse

In short

Everything about the goods in your workplace's warehouse: stock, the item catalogue (a directory of items), goods receipts from suppliers, transfers between warehouses, write-offs, stocktakes and kits.

Why it matters

- Know what you have, how much is reserved for orders and repairs and how much is free.
- Record every movement with a document: each stock level is explained by a receipt, sale, installation or write-off.

Who can

Anyone allowed to view the warehouse sees stock; the value and the "Total at cost" only with the cost permission in the warehouse's branch (without it, the cell shows "—" and no total is shown). Receipts and transfers are posted by the storekeeper and the branch manager. Write-offs and stocktakes are prepared by the storekeeper as drafts and posted ("Write off", "Post stocktake") by the branch manager. No tab or button means no permission.

How to do it

1. **See stock.** "Stock" tab: on hand, reserved, available and value at cost. Search by part number, EAN or name.
2. **Add an item.** "Product catalogue" section → "Items" → "New item". Many at once — "Import" from a file (items, retail prices, attributes, photos in a ZIP). Under "Reference data", "Services": work and services for the repair order and the service invoice (name for documents, hourly or fixed price, tax); it is the same list as "Work types". **Your own columns.** The product catalogue is a directory of items: card data only, with no price or quantity (prices and stock are in "Stock" and on the item card). The "Columns" button above the list: tick the card fields you need — codes by kind, weight and dimensions, condition, attributes of the category chosen on the left (or find any by search) — and order them by dragging or with the arrows; up to 20 columns. By default: photo, brand, part number, name ("Reset" brings them back). Your choice is remembered for you on all your devices. Click a column header to sort the whole catalogue. "Export to Excel" — the chosen columns and all items of the current search and filter. On the phone — cards with the chosen fields. Only the administrator sees supplier codes. **Pages, filters and readiness.** The list shows 50 items at a time: "1–50 of N", "‹ Previous" and "Next ›"; a new search, filter or sort goes back to the first page. Above the list are the quick filters "In stock", "Not ready to sell" (something required for a marketplace listing is missing, as on the "Sales readiness" tab) and "No photo"; "Select all filtered" and "Export to Excel" use the same filter. The "Ready to sell" column appears if the organisation has connected marketplaces (a sales channel connected to a marketplace, such as Allegro; price lists for workshops and manual order sources do not count): the bar shows how many readiness checks are passed; fully ready items show the marketplace names, the rest "7/12 · what is missing" (required first; the full list on hover). A red bar means something required is missing; orange — only something recommended. **Bulk actions.** Tick items (or the header box — all on the page, then "Select all filtered") → "Archive", "Edit" (category, brand, tax category) or "Delete". Delete first shows the analysis: items without history are deleted completely (with codes, texts and photos), items with history go to the archive; over 1,000 — confirm by typing the number. It runs in the

background with progress in the window. The archive — the "Archive" switch, from there "Restore from archive". Deleting: administrator and manager. **Tyre marking** — from a name like "235/65 R16 115/113R C 3PMSF XL RFT" fills in the empty tyre attributes of the product's category: size, load and speed indices, season (from words like winter / all season in the name), vehicle type, XL, Run-flat, 3PMSF, M+S, OE approval (* BMW, MO, AO, N0…); values entered by hand do not change. The administrator creates the attributes with the "Tyre attributes" button of the category in "Categories". **Undo upload** — in the product import log (also "your own file"), on an upload whose created products are still in the catalogue: deletes the cards it created by the same rules (with history — to the archive); changes to products that already existed are not reverted. Uploads made before the version with this button did not mark their products, so they have no button. On the left is the catalogue tree: section → category → subcategory, with the number of products in the branch ("All products" is the whole catalogue, "No category" the products not yet given a category); pick a node to see its products on the right, filtered by brand, attributes and stock. A product goes into the last level of the branch — the part type ("Brake pads", not "Braking system"). Products placed higher up are listed under "Move to subcategories". Above the list are the collections ("Maintenance", "Tyres and wheels", "Oils and fluids", "Accessories"): click one to keep only its products; together with a tree node both filters apply. **The item is not in the list** (customer order, estimate, goods receipt, supplier order, invoice reading, stocktake, claim): in the item field — "Find “…” at suppliers" (part number or EAN in price lists: "Add to the line", and without a card "Create card and add"; the sale price follows the markup, in purchasing it is the purchase price) or "+ New item “…”", a short form on top of the window: brand, part number, name, EAN, tax. If the same brand and part number or the same EAN already exists — "Select it". The rest is filled in later on the card.

3. **Receive goods from a supplier.** "Goods receipt" tab → supplier, their document number → lines with purchase price excl. tax → "To receiving". The receipt is "awaiting receiving": stock changes only afterwards. Receipts created from a supplier invoice (including a read one) and from "Receive" on a supplier order also await receiving. **Receiving** ("Receiving" tab, phone, tablet or computer with a scanner): open the receipt and scan every unit — a USB or Bluetooth scanner types the code into the field. Unknown barcode: pick the item and the code is remembered for the organisation; if a code belongs to several items of the receipt, the program asks which one it is. On a phone, "Hide keyboard" keeps the field ready for the scanner without the on-screen keyboard. Manual quantity ("−", "+" or a number) and "Accept all manually" only if "Scanning settings" say "by scanning or manually (marked)" (default: "by scanning only"; the administrator changes it per operation type); an extra scan can always be removed with "−"; each line shows how it was confirmed. Damaged or wrong item: "Discrepancy". "Finish receiving" puts what was accepted into stock at the line price (at the invoice price if the invoice is already entered) and reserves customer-ordered goods; the receipt date is the receiving day. What did not arrive and was not marked is "missing"; on a supplier order without an invoice the shortfall stays open in the order — the next delivery is expected. A receipt without an invoice that will not arrive: "Cancel receipt" with a reason. If the receipt already has an invoice and less arrived, the invoice becomes disputed (payment paused, purchasing reviews it). "Scan log": every scan with the time to the second, employee and workstation; the "camera" time uses the workstation's camera clock offset. Employee video surveillance must be notified (LOPDGDD, art. 89): the program only stores scan times. **Goods receipts list** — below the form in the "Goods receipt" tab: number, date, supplier, supplier document number, amount, receiving status (awaiting, partly received, fully received, cancelled) and a "not scanned" mark if some lines were confirmed by hand. Filter by supplier, period and status. A row opens the **goods receipt card**: what was expected and what was received, discrepancies with a reason, price and amount, how

each line was confirmed (scan or by hand, who and when), who received it, the "Scan log" and related documents (supplier order, invoice and its scan, customer orders and repair orders whose reservation the goods went to). Buttons: "Continue receiving" (while awaiting), "Print" and "Cancel". A document number in the program's lists and cards is a link: it opens that document's card.

4. **Transfer between warehouses.** "Transfers" → "New transfer" → from, to and items → "To picking". The transfer waits for picking in the "Receiving" tab: scan every unit at the sending warehouse → "Send" — what was picked leaves, anything not picked stays. Warehouses of the same branch — the goods are at the destination at once. Another branch — the goods are "in transit"; at the receiving warehouse — "Receive by scanning" (or the transfer in the "Receiving" list) → scan → "Finish receiving"; anything not received stays "In transit" marked "missing" — if it turns up, receive it later. Without a scanner (if the organisation allows it): "Send now manually" and "Receive manually". Transfers for orders and "Restock the showcase" also wait for picking. A part for an order: choose "For order …" in the line — the order's reservation moves with the part (to another branch — on receipt).
5. **Write off.** "Write-offs" → "New write-off" → items, reason and expense category → "Write off" (or "Save draft").
6. **Stocktake.** "Stocktake" → "Start stocktake": the document is filled with every item in stock. Enter what you counted (in parts or with "Count from file") → "Save count" → "Post stocktake". Shortages and surpluses are posted automatically.
7. **Catalogue sections.** "Product catalogue" is a menu section of its own (formerly a "Warehouse" tab; old links and bookmarks lead here): "Items", the item list; "Data quality", what the items are missing; "Reference data" and "Tools", menus. "Reference data" → "Services" are the work types; the administrator edits them in "Settings → Reference data → Work types" (the item leads there), other staff see the list here. The VAT rate of a job is also shown on the estimate and invoice line. "Reference data" (Categories — for the administrator, Brands, Product types: "Pastillas de freno", "Filtro de aceite"; the type on a card is chosen from the list, spellings that differ only in case, in «ë»/«e» or in Latin letters typed for Cyrillic ones collapse into one type (types that already clashed are listed under «Duplicate types» with «Merge»), and renaming or merging changes it on all cards and markup rules; each type has a code, a customs code and "show on website"; "Import" loads the list of types from a file — the accounting program's export of product types: a type is matched by code, then by name, uploading the same file again changes nothing, and a name repeated in the file with another code is an error for that row; an upload does not change a type's code — a type without one gets the code from the file, a different code is changed in the type window; search works by name or code; a type's code is its TecDoc number (1–9999): an upload does not create a new type without a code, and «Kinds without a TecDoc number» (for the installation administrator) shows a summary — how many types lack it, how many have cards, how many markup rules — and «Archive»: the types are not deleted and are no longer assigned to cards; cards lose the type; the kinds list works like the catalogue: on the left, the category tree with the number of kinds in each branch («No category» — kinds without a rule); filters by category, active or archived, with cards, TecDoc number, on the site and search; «Columns» to choose your own; «Export to Excel» with the filtered kinds, their code and the category code (the file can be corrected and loaded back into «Mapping from file»); tick kinds and «Move» them to a last-level category — the rule is set as manual, the kind's products without a category get it and, with «and the kind's products in the previous category» ticked, those too), "Data quality" (one screen: tiles with counters at the top — how many products have no photo, texts, attributes, EAN and OE, vehicles, weight or hazard decision, how many are not ready to sell and how many duplicate groups there are; the bar shows the share filled in; click a tile and its list appears below the tiles; missing data can be typed right in

the row: EAN or OE number ("Numbers and codes"), weight in kilograms above zero ("Weight and dimensions") — field and Enter, the row leaves the list; an EAN with a wrong check digit is not saved, a second EAN is kept as an additional one, and the vehicle maker of an OE number can be added later on the card; in "Texts" select rows and "Translate selected" — on-demand machine translation; Photo: how many products have no photo, best sellers first, upload as ZIP and by link; Weight and dimensions, for shipping; Texts, Characteristics, Numbers and codes, Vehicle fitment, Safety: how many products lack data, the "what is missing" list with best sellers first, "Fill in from a file"; Sales readiness, across the whole catalogue: how many products fail each marketplace requirement — EAN or brand with part number, name, photo, quality, weight, attributes; Duplicates: cards with the same EAN or brand and part number side by side, "Keep this one": codes, photos, texts, attributes and empty fields move to it, a duplicate without history is deleted and one with history goes to the archive) and "Tools" (Supplier links: price-list items without a product card by brand, "Create product cards"; Upload log: all catalogue imports in one list, "Undo upload"; Categories by part type, Type by OE number and Machine translation, below). In the tabs that depend on the category (Characteristics, Numbers and codes, Safety, Vehicle fitment), products without a category do not count as filled: their number is shown separately, "No category: N — not determined". "Tools" → "Categories by part type": products without a category, grouped by part type (the product type or, if there is none, the supplier's short name: "Glühkerze", "Einlassventil"), largest groups first. Suggestion: the category with the same name in any language, or "Suggest with AI" for the checked groups (the connected model of the "Document recognition" block, only when you press the button and within the monthly spending limit). Check the category and press "Assign to checked": the category goes to the group's products and the "type → category" rule is saved; in future uploads (own file, supplier price lists) new products of that type get it automatically. You can forget a rule: products keep their category. «Mapping from file» loads "kind → category" as a list: kind code (TecDoc number), code of a last-level category and confidence h / m / l. High (h) is applied straight away as a rule and the kind's products get the category; medium and low show up here as a "from file · medium / low" suggestion — check it and assign. A rule confirmed by a person (by hand or by accepting a suggestion) is not changed by the file — only rules set by a file change; loading the same file again changes nothing. "Tools" → "Type by OE number": the type of an original part from the structure of the make's part number (masks: for BMW the first 4 digits are the assembly, for Toyota the first 5, for VAG characters 4–6). "Recognise" checks products of original-equipment brands without a type, up to 5000 at a time; press it until none are left. The type is set automatically only on products without a type, only if the make has "Assign automatically" on and only at a confidence not below the threshold (0.85 by default: "exact" mask 0.85, "by weight" 0.70, "group" 0.50); the category follows the "type → category" rule. The installation administrator switches "Assign automatically" on once the make's masks pass the check on cards whose type was set by a person: at least 25 part numbers and a lower accuracy bound of 85 % or more; the check is repeated on every recognition run. A type set by the program itself, or confirmed in the queue as the same type the mask proposed, does not count as a label. Everything else goes to the "Review queue": choose the type (a new name creates the type) and press "Use" or "Reject" on the group. The program never changes a type that is already set. The threshold and the masks (download, upload your own file, restore the program's file) belong to the administrator, and changes are logged. "Check of assigned types" (same screen, below the queue): "Train" builds the make's dictionaries from types set by a person — "name words → type" and "number prefix → type"; "Check types" compares the card's type with three witnesses: the name, the number prefix and the mask. The type never changes by itself: a "was → becomes" list with the reason, "Correct" or "Keep" per group. "Correct" is proposed when the name and the number agree on another type;

"disagree" — the witnesses conflict and you decide. What you keep is not proposed again until the card's type changes; changes are logged. "Tools" → "Machine translation": the product name and description in Spanish, English, Polish and German by the AI model from "Connections" (except the language of the original text). Product kind names are translated by the background worker with the same model and within the same limit — up to 60 names per request, before products, kinds with more cards first: the translation is written only into empty languages and over machine text, marked «Machine translation — check» in the kind window («Checked» removes the mark, so does a manual edit); a new kind name goes back to the queue. The installation administrator turns translation on, chooses the organisation whose model translates and sets a monthly limit in € (100 € by default, or "no limit"); spent and remaining amounts are shown. Queue: in stock, listed on marketplaces, selling, the rest. The groups in the "Translate automatically" setting are translated on their own (by default in stock, on marketplaces and with sales); other products, such as price list cards, are translated on demand — with the "Translate" button on the card's "Texts" tab or the "Translate" bulk action in the product list; their number shows as "on demand: N"; the background worker translates in batches and "Translate now" makes one short request (a few products). Translation only fills empty fields, marked "machine translation — check" (product card, "Texts" tab): fix the text or press "Checked", and the page address in that language then appears; manual text is never changed. Nothing is translated into the language of the original text: its field gets the original text itself. A description longer than 3000 characters is not translated (only the name). The same original text is not translated twice. If the model fails twice on a product's text (cut-off reply, omission, a translation with links or much longer than the original), the product leaves the queue — "not translated: N", and "Retry" brings such products back. If the model does not respond (key, balance, network), the reason is shown on screen and background translation tries again after 30 minutes, then less often. When the limit is reached the queue waits for the next month or a new limit, and an email goes to the organisation. The limit is calculated from the model's token prices: with a model without prices (ChatGPT, Gemini — prices in "Connections") translation with a limit does not run, only "no limit". "Translate now" skips products with a long description — the background worker translates them. Spend and limit are visible to the installation administrator and to staff of the organisation whose model translates; translating with the button is for those who edit the catalogue in that organisation. An EAN counts ("Numbers and codes", "Marketplaces") only if it is a barcode — 8, 12, 13 or 14 digits — and does not equal the part number: some suppliers put the part number in the barcode column; such a value is not saved as an EAN on upload, and for products already loaded the card shows a warning. In "Upload log", an upload with errors has "Errors CSV": a file with the row and the reason. Help on brands and categories is in the "Reference data" article. **Weight and dimensions** ("Data quality" → "Weight and dimensions"). For the weight and for the sizes you see where they come from: "measured" (card, file, supplier price list) or "estimate" (by analog, gross from net, median). At the top: how many products are measured, estimated, by analog and without data, and separately how many weights are measured and estimated. "Estimate by medians" fills an empty weight and sizes from products of the same type (then the same OE number mask, then the group) with at least three measured products; if the product's weight is known, the sizes are fitted to it. An estimate never becomes "measured" and never replaces measured data; enter the weight on the card or upload it in a file and it becomes "measured". Uploads and price lists are cleaned: grams instead of kg are fixed; a pallet or batch weight, 999 placeholders and sizes over 3 m are not taken; a weight for N pieces is converted to the package; with only a net weight (or gross = net), gross = net × 1.15, which is an estimate. What was cleaned is shown in the upload results and on the product. "Logistics rules": gross factor, volumetric divisor, weight brackets (2 / 5 / 10 / 20 / 31.5 kg), oversize (heavier than 31 kg or a side longer than

1.2 m), "Pairs by product type" (discs, shock absorbers, springs — weight ×2; pads — no; off by default) and the median sample. Each product has a bracket and a status: ready, bracket: exact weight, bracket: estimate, to review (oversize, a cleaned value or only some sides entered manually), no data. Logistics rules are changed by the installation administrator, pair types by whoever edits the catalogue; changes are logged. If another administrator has changed the rules in the meantime, «Save» does not overwrite their changes: the window shows the fresh rules — repeat your changes. If you entered or corrected only some package sides (there were no own sizes, or they were estimated), the product shows «sides entered manually — to review»: estimation by medians and filling by analogy leave these sizes alone, and a supplier price list with other sizes raises a conflict — until all three sides are entered or uploaded. In a large catalogue «Estimate by medians» and «Fill by analogy» take several presses — each continues where the previous one stopped; what is left is shown in the message.

8. **Import from own file.** "Import" → "Import from own file": the supplier's file in its own format (CSV, TXT, XLSX, ZIP), up to 2 GB. Set up the format once: "Formats" → "New format" → a sample file, read settings, which column is the part number, EAN, brand, name, category and attributes (brand and category can be one value for the whole file) → "Check the first rows" (nothing is saved) → "Save format". Then "Upload file" → format and file → "Upload": it is saved in the background and you can close the window; you see the progress, can stop it, and rows with errors are in "Errors CSV". Up to three uploads queued per employee. **A supplier's assortment file** (for example Inter Cars ProductInformation, with no prices or quantities) loads the same way: besides the basic fields it takes package weight and dimensions, the TecDoc brand number (the brand from the directory when the file's brand is not there, for example a short code), supplier codes (TOW_KOD, IC_INDEX; managed by the administrator), description, customs code, "no return", OE numbers, cross numbers and replacements. For the whole file you choose the supplier of the codes, the unit of dimensions (mm, cm, m) and the description language (with a language chosen, the description goes to the "Texts" tab in that language and the main one does not change; if there is no main description, the card and "Marketplaces" show this text marked with the language, e.g. "(DE)"). A product is found by EAN, by brand and part number, and by that supplier's code: loading again creates no duplicates. There can be several EANs separated by commas: the first is the main one, the others are kept for reference (to recognise and match the product). "No return" shows on the card, when picking the product and at the counter. **Own columns.** "TecDoc part number" (TEC_DOC): another number of the same part as TecDoc writes it; if there is no part number column, the product is found and created by it. **"+ own field"**: any column of the file becomes a product characteristic with the name you choose (and a unit, if needed); if the product's category has a characteristic with that name, the value goes there. **"+ other code"**: a column with an internal code, OE numbers (maker in the cell "BMW: …" or one for the whole column), equivalents, replacements or codes of another supplier (managed by the administrator). Empty cell: no change; "-": remove; loading again creates no duplicates.
9. **Photos by link.** The photo_url column in the product import (in your own format, "Photo (link)", up to five columns): one or several links separated by ";". Links are queued and the background worker downloads and processes the photos: first products in stock and those that sell, then those listed on the website and marketplaces, then the rest. A new upload queues only new links; the same photo under another link is not uploaded twice. Your own photo stays the main one; supplier photos go after yours. Progress and errors: "Import" → "Photos by link" ("Retry errors"); on the product card, "Photos and documents" tab — the product's links and "Add by link". If the server is down, it retries after 1, 6 and 24 hours; if the link does not open (404) or is not a photo, the error is immediate.

Common messages

- **"AI suggestion: connect an AI model…"** — "Categories by part type" suggests by name without AI too; for "Suggest with AI" the administrator connects a model in "Connections" (the "Document recognition" block).
- **"This month's AI spending limit has been reached"** — the limit is shared with invoice recognition; raise it in the "Invoice recognition (AI)" module settings. You can still choose the category by hand.
- **"A product goes to the last level of a branch…"** — choose a category without subcategories or create one ("+ Create category" in the list).
- **"The warehouse is empty"** — post a receipt or opening stock (the "Go-live" section).
- **Supplier debt comes from their invoice, not from the receipt** — pay the supplier against the invoice under "Purchases".
- **Not enough available** when writing off or transferring — part of the stock is reserved for orders.
- **"A similar brand already exists"** — pick the brand from the list or confirm that it is a different brand.
- **"Brand blocked"** — the brand's products are not sold, ordered or exported; the administrator blocks and unblocks.

Questions and answers

How do I fill in oils from the manufacturers' catalogue? "Import" → "Manufacturers' oil catalogue" → the oil catalogue workbook (products sheet and approvals dictionary sheet) → "Check". The summary shows per brand how many rows there are, how many match your products (manufacturer's brand and part number or EAN; Elf and Total count as TotalEnergies) and which fields will be filled. "Apply" only fills empty fields: viscosity, ACEA / API specification, approvals as a single code ("VW 504.00" and "VW 50400" are the same "VW 504 00"), "meets the requirements" kept apart from approvals, volume, description in the sales languages and the category if there is none. No new products are created, filled fields are not changed and loading the same file again changes nothing. Repsol is not applied. After that, searching oil by approval finds it even if the approval is written differently on the product. Rows without part number or EAN (in the catalogue: TotalEnergies, Elf and Mobil) cannot be matched — the summary shows how many. If one part number belongs to different oils, the product is not filled: row error, check the part number. The product's main description is not replaced.

Can we sell during a stocktake? Yes. "Book qty" is saved at the moment "Counted" is entered for the line, and on posting the difference is taken from that value: sales and receipts after the line was counted do not affect shortages or surpluses. So enter the quantity as soon as you have counted the product.

What happens to products that were not counted? Nothing: lines without "Counted" and products not in the document do not change on posting, so the warehouse can be counted in parts. If you find a product that is not in the list, use "Product not in the list": the quantity and, if the product has no cost yet, "Unit cost".

Why won't the stocktake post? The storekeeper has no "Post stocktake" button: the branch manager (or the administrator) posts it. For example: "…: shortage of …, but only … is free — the rest is reserved for orders. Release the reservation or deliver the order first."; "…: surplus, but the product has no cost yet — enter it in the line."

How do I correct a posted stocktake or write-off? It is not reposted ("A posted stocktake is not reposted: cancel it and post a new one."): in "Documents", open the document → "Cancel document"

with a reason, then create a new one. The branch manager or the administrator cancels it; its postings are reversed and a cancelled document cannot be posted again. Cancelling is refused if these products had other stock postings in that warehouse after the document, for example a sale: "These products have later stock postings. Cancel the later documents first (correction chain)."

At what cost are goods written off? Write-offs and shortages: at the average cost of the warehouse stock. Surpluses: also at the average cost of the stock; with no stock, at the last receipt price; and for a product never received, at the "Unit cost" in the line.

Where next

- Product card — prices, codes, equivalents, photos, supplier offers.
- "Purchases" — supplier orders and their invoices.
- "Go-live" — opening stock from your previous program.

Finance

Cash register receipts (Poland)

In short

The kasa fiskalna station: a computer with a POSNET fiscal printer on USB and this page open in Chrome or Edge. Here receipts (paragony) for sales to private persons are printed, the returns register (ewidencja zwrotów i reklamacji) is kept and device reports are made. It exists only for a Polish organisation.

Why it matters

- In Poland a sale to a private person is registered on the register no later than the payment day — the program queues the receipt itself.
- Returns and erroneous receipts reduce the sale by a register entry, not by cancelling it: the program makes the entries.
- In JPK each register has rows RO (sales), ZW (returns) and PB (erroneous receipts).

Who can

Print receipts, make reports and mark signatures — whoever posts the branch's sales. Add registers — the administrator.

How to do it

1. **Connect the register.** Administrator: "New branch cash register" → name. Then pick the register → "Connect" → choose the device port in the browser window. You will see the mode (fiscal or training) and the PTU rates.
2. **Print receipts.** "Print all" — the queue in order; "Print" — one receipt. Before the first receipt of a new day the station makes the missing raport dobowy for the previous day itself. A company buyer wants its NIP on the receipt: "NIP" on the queued receipt, before printing.
3. **Parcel.** The receipt of a paid order is printed before shipping and goes into the parcel: the goods issue is not posted without it.
4. **Return.** Record the customer return in the order (or "Cancel with refund"). The entry appears in "Ewidencja zwrotów i reklamacji". At the counter: "Protocol", customer's signature, "Signed". A parcel needs no signature.
5. **Erroneous receipt.** Turn on "Printed" → "Erroneous" → what happened; keep the original. The correct receipt is queued again.
6. **End of day and month.** "Raport dobowy (end of day)". After the month ends: raport miesięczny on the device, then "Done".
7. **Invoice for a receipt (FP).** The customer asks for an invoice: "Printed" → "Invoice" → customer → "Issue invoice". It is a KSeF invoice marked FP with the receipt number. To a company only if its NIP is on the receipt; to a private person with name and address in the card; no later than 3 months after the end of the sale month.

Common messages

- **"to check"** — the connection dropped after the receipt was closed: look at the printout, then "Resolve": "Printed" with its number or "Not printed: back to the queue". The receipt is never reprinted by itself.
- **"The cash register has no PTU rate …"** — the rate is not set in the device; the serwisant sets it.
- **"Another device is connected"** — the register is bound to a device with another unique number: pick its register.
- **"The receipt … is not printed yet"** — print it before the return or the goods issue.

Questions and answers

A company wants an invoice but the receipt has no NIP. Is that possible? No: "The receipt has no buyer NIP: a company cannot be invoiced for it (art. 106b ust. 5 — 100% VAT penalty). For a company, issue a KSeF invoice at the sale." The NIP can only be added before printing ("NIP" on the queued receipt) and must match the NIP in the customer's card. If the customer on the sale is a company with a NIP in its card, the program puts it on the receipt by itself.

Why is there no "Invoice" button on the receipt? It is only on a receipt printed in fiscal mode and not marked erroneous (turn on "Printed"). An invoice is also refused in other cases, for example: "Invoice … has already been issued for this receipt."; "The receipt has a register entry (return or mistake): the program does not invoice it — do it manually with the accountant."; or a request made more than 3 months after the end of the sale month.

Is a receipt with a NIP already an invoice? Up to 450 zł, yes: it is a faktura uproszczona, and an invoice (FP) can also be issued for it later. A receipt over 450 zł with a NIP is not an invoice: the buyer will need an invoice for the receipt (FP).

When do I mark "Erroneous" and when do I record a return? "Erroneous" is only for an obvious mistake noticed at once (receipt printed twice, wrong sale or wrong price) and only if you hold the original: without ticking "I have the original erroneous receipt — I will attach it to the register", "Record error" stays disabled. "Print the correct receipt again" is ticked by default: it queues a new receipt of the same document with the same lines, amount and NIP, and the sale itself does not change. If a correct receipt already exists (printed twice) or the mistake is in the sale itself (wrong price, wrong sale), untick it and fix the sale separately. If the receipt is already with the customer or in the parcel, record a customer return on the order. The mark cannot be undone: the receipt keeps an entry in the ewidencja.

Why did queue printing stop? "Print all" stops at the first device refusal or connection drop, so that nothing extra is printed. A refused receipt can be printed again with "Print"; one marked "to check" is never reprinted by itself: press "Resolve" and, from the printout, choose "Printed" with its number or "Not printed: back to the queue". Printing also stops when a receipt was printed but its number did not reach the server: "Receipt No. … was printed but the server did not get the number: mark it via “Resolve”."; that receipt stays in the printing state and is also resolved with "Resolve".

Where next

- Customer order — customer return and "Cancel with refund".
- "Taxes" → JPK_V7M — the register's rows for the month.

Documents and finance

In short

All the company's posted documents (receipts, sales, orders, payments, invoices) and its finances: cash desk, revenue by day, income and expenses, bank, P&L and Cash Flow reports, marketplace settlements and exchange rates.

Why it matters

- Find any document and see which stock, money and balance postings it made.
- Close the cash shift, reconcile revenue and bank, and see profit and cash flow.

Who can

Viewing documents: by the permission for each document type. Postings, cancelling, bank and reports: administrator, finance and branch manager. The gestor package: finance, gestor and administrator. The cash shift is closed by reception, sales, finance and the branch manager. No tab means no permission.

How to do it

1. **Find a document.** "Documents" tab: search by number or counterparty, filter by type and dates. Click a row — "Document postings" opens and shows what it changed; "Open record" shows the document itself.
2. **Cancel a wrong document.** For documents without their own card — in "Document postings", "Cancel document" → confirm; others are cancelled from their own card. Its postings are reversed and the document stays in the list as cancelled. If it has payments or handovers, cancel those first.
3. **Service invoice.** "Save draft" — no series number, can be edited and deleted; "Preview" — the same PDF the customer gets; "Issue" — series number and today's date. In the window: date or month of service (unchanged on issue), payment term in days, document language — Spanish, English, German or bilingual "Spanish + German" (with the amount in words). Default language — from the customer card ("Document language"); for a foreign company, Spanish with English. A missing organisation tax ID is flagged as soon as the window opens. "Documents" tab → "Service invoice": customer, date, lines — a work type from the reference list or free text, quantity (hours or pieces), price → "Issue invoice". The invoice gets its series number at once. Tax depends on the customer: a business in another EU country with a VAT number valid in VIES — no Spanish VAT, marked "Inversión del sujeto pasivo"; a business outside the EU — not subject; a Spanish business, a private person or a business whose VAT number is not valid in VIES — at the VAT rate. Switch "Consulting, financial, legal and similar services": for a private person living outside the EU — not subject (art. 69.Dos); repairs and other work done here — with VAT. A self-employed professional with "IRPF withholding" set in the company details (15 % or 7 %): for a business or self-employed customer in Spain the invoice withholds on the base without VAT; it shows "Retención IRPF" and "TOTAL A PAGAR", and the customer's debt is the amount payable. The invoice window has the PDF, "Take payment" (the customer's debt is on this invoice) and "Send by email" (the email from the customer record or another one).
4. **Cash desk.** "Cash desk" tab: cash in and out, closing the shift with a count.
5. **Revenue.** "Revenue" — sales and payments by day and payment method.
6. **Income and expenses.** "Income & expenses" — payments without an invoice (rent, phone, etc.) by category.

7. **Bank.** "Bank" — upload a statement (Norma 43 or CSV): the program matches payments to documents using rules.
8. **Reports.** "P&L and Cash Flow" — accrual profit and cash movement for a period.
9. **Taxes: OSS.** "Taxes" — sales to private buyers in other EU countries this year and last year against the 10,000 € threshold. Above the threshold, marketplace, shop, website and staff orders shipped to a private buyer in another EU country carry the buyer country's VAT (the buyer's price stays the same) and a full invoice with the buyer's name and address. The box does the same below the threshold (once registered). A red warning means the threshold is exceeded without OSS registration: file form 035 by the 10th of the next month and enter the date. EU countries' rates are on the same screen; a new rate applies from its date. The same screen shows "Modelo 369 for the quarter": year and quarter → VAT by country and rate, corrections of previous quarters, filing deadline → "XLSX" for the gestor. The same screen has "Modelo 349: transactions with EU businesses": month or quarter → net base by the counterparty's VAT number and key (E, S, A, I), corrections of previous periods, filing deadline → "XLSX". And "Modelo 347: annual transactions with third parties": year → counterparties in Spain above €3,005.06 including VAT, by quarter, cash above €6,000 → "XLSX". Insurance, rent and professional services are included; for a supplier marked "We withhold IRPF" (card; set by accounting), rent and, for a private person, all services go to modelos 180/190, not 347. "Modelo 303: VAT for the period": month or quarter → boxes for VAT due (by rate, self-assessed, adjustments), deductible VAT (purchases in Spain and in the EU, capital goods separately, returns to suppliers) and the result → "XLSX" with the per-document breakdown. Post passenger car expenses under "Passenger car" — 50 % of the VAT is deductible (vans and lorries: "Van, goods transport", 100 %); gifts to customers and entertainment under "Entertainment and gifts" — VAT not deductible; business meals and trips under their usual items. Imports from outside the EU: the "DUA" block below the boxes — date, DUA number, customs base and VAT (boxes 32–35). After filing, enter the "AEAT filing date" and press "Mark as filed": a negative result moves to box 110 of the next period (in the last period of the year, choose refund or offset). An amount can be offset for 4 years from the filing of the return in which it arose, and refunded only in the last return of a year: the program warns in the last such return within the term. An amount to offset from returns filed before the program goes into "Amount to offset before the program" in the first period, with the end date of the period in which the oldest part arose. An invoice from a supplier in another EU country with Spanish VAT triggers a warning: if the supplier sold through OSS, as to a private person, that VAT is not deductible; ask for an invoice without VAT to your EU VAT number. At the top — "Paid by companies, not delivered": the company paid last month and the goods are not delivered yet → "Issue advance invoices" (by the 15th; VAT goes to the period of payment). From the 10th — a reminder; on the 15th the program issues the rest itself. On delivery the final invoice deducts the advance.
10. **Package for the gestor.** "For the gestor": choose the period → the program shows what goes into the package and what blocks it (exceptions with links to documents) → "Download package" (ZIP: VAT books, payments, original invoices and a file list). If there are exceptions you cannot fix now, use "Download as "incomplete"".

Common messages

- **"…the invoice has already been issued; only the administrator can print or send it again"** — the customer blocked their data (GDPR): the invoice is handed out once; reprinting or resending is done by the administrator of the whole installation and is logged.
- **"…the invoice is sent only to the email on the card"** — for a blocked customer no address is

typed: the email goes to the address on their card.

- **"Showing the latest 100; refine the search or dates."** — narrow the period or search by number.
- **The document made no postings** — it is a draft, cancelled, or a base document without movements.
- **Postings are visible to the administrator, finance and the branch manager** — others do not see them.

Questions and answers

Why is there no "Cancel document" button? It is in "Document postings" of a posted document. A customer order and a repair order show "Open record" instead: they are cancelled from their own card. Only users allowed to post that document type can cancel it; otherwise the program replies "No “…” permission in this company or branch."

Why can't I cancel a document? For example: "The period is closed up to … A document dated … cannot be changed."; "These products have later stock postings. Cancel the later documents first (correction chain).", when after the document there were, for example, sales of these products in that warehouse; "Cancelling would make stock negative: the goods were already used by other documents."

How do I cancel an issued customer invoice? An invoice with a series number cannot be cancelled the usual way: "A fiscal invoice cannot be cancelled the usual way: cancel it in Verifactu or issue a corrective invoice." The "Cancel invoice" and "Corrective invoice" buttons are next to the invoice in the customer order or repair order card and in the invoice window on the "Documents" screen (including a service invoice), for users who post invoices; "Cancel document" is not shown for a fiscal invoice. A service invoice that already has a payment cannot be cancelled: "The invoice has payments: cancel them first." Nor can an invoice with corrective invoices: "Invoice … has corrective invoices: cancel them first." In Spain the cancellation is recorded in Verifactu and cannot be undone; in Poland (KSeF) "Cancel invoice" appears only on an invoice rejected by KSeF and "Corrective invoice" only on one KSeF accepted; while the invoice is being sent, neither is shown.

Can a cancelled document be posted again? No: "A cancelled document cannot be posted. Create a new one." Cancelling is final: the document stays in the list as "Cancelled" and the correct document is created again.

Where next

- "Purchases" — supplier invoices and debts.
- Customer card — what the customer owes and their credit.

Stripe payouts

In short

Stripe collects customer payments in its balance and every few days transfers them to the bank, keeping its fee. Here you record each payout: how much reached the bank and how much Stripe withheld. At the top, the balance of the "Stripe" account: the website and customer-link payments, less refunds, that Stripe still holds.

Why it matters

- Move the money from the "Stripe" account to the bank, as on the statement.
- Book the Stripe fee the way the gestor recommends: it settles the debt to the supplier "Stripe Payments Europe Ltd" on its monthly invoice, and the expense and tax are booked by the invoice itself.

Who can

The finance manager, the administrator and a manager with the marketplace payout right for the whole company record payouts.

How to do it

1. **"Stripe" account.** In "Companies", on the "Bank / card terminal" till: "Payment service: Stripe" and "Payouts to account" (the bank Stripe transfers to).
2. **Automatic draft.** If the Stripe webhook address has the payout.paid event, the payout arrives as a draft: amounts from Stripe and, below, "Payout breakdown at Stripe" (payments, refunds, fees, other). "Matches": everything is in the program; "mismatch": a payment or refund is missing, the total differs or there are disputes (it also shows in "Orders" → "Unrecorded Stripe payments"). "Review and post" → supplier, invoice → "Post"; not needed (entered manually) — "Cancel the draft". Also add the payout.reconciliation_completed event: while Stripe reconciles the payout there is no draft. Test payouts and manual payouts (from the Stripe Dashboard) create no draft.
3. **Record a payout manually.** "Stripe payout": the payout number at Stripe (po_…), the date received, the amount that reached the bank, the bank account (by default "Payouts to account") and the Stripe fee.
4. **Fee.** Choose the supplier "Stripe Payments Europe Ltd" (create its supplier card once; after that the program requires the same supplier) and, if the monthly invoice is already entered, that invoice. Without an invoice the fee becomes an advance to the supplier.
5. "Post": the amount to the bank and the fee leave the "Stripe" account.

Common messages

- **"There is no account with the Stripe payment service (a "bank" till): nowhere to take the payout from."** — mark the "Stripe" account in "Companies" (step 1).
- **"The service fee is a debt to the supplier "Stripe Payments Europe Ltd": choose its supplier card."** — the fee cannot be posted without the supplier.
- **"The Stripe fee is a debt to the supplier "…", as in earlier payouts."** — there is one Stripe supplier; choose the same one as before.
- **"Stripe payout … has already been recorded."** — that payout is already posted; the money is not

moved twice.

- **"Supplier invoice … has … outstanding: the deduction is larger."** — the fee is larger than what is left on the invoice; choose another one or none (advance).
- **"The payout is already posted or cancelled."** — the draft was already posted (another click): reload the page.

Questions and answers

Why doesn't the Stripe fee go to expenses straight away? That is what the gestor recommends: the monthly Stripe invoice (a supplier in Ireland) books the expense and the tax, and the payout withholding only settles the debt, so the expense is not counted twice. The tax type of each line follows the invoice: in Spain other Stripe services carry reverse-charge VAT (303 boxes 10–11 and 36–37; 349 key I); payment processing may be an exempt financial service — check with the gestor; if confirmed, set the line category "Banking and payment services (VAT-exempt)". Enter the invoice with the "Operation date", the last day of the fees month: the tax goes to that month even if the invoice is issued later. Reverse charge applies under the general regime; with recargo de equivalencia, módulos or without ROI registration, ask the gestor.

What if there is no monthly Stripe invoice yet? Post the payout without an invoice: the fee becomes an advance to the supplier (only in the books: for VAT it is not a prepayment). When you enter the Stripe invoice under "Orders and invoices", it takes those advances by itself. At year end, fees without an invoice must be booked as that year's expenses — tell the gestor.

What about website payments? Once the "Stripe" account is marked, website payments go to it, like customer-link payments, and a refund to the buyer "through the marketplace" is taken from it: the whole Stripe payout is recorded here as one document. Website payments taken earlier stay on the marketplace account of the shop channel: pay them out as before with a "Marketplace payout" on the channel's payouts screen until the balance is zero.

How do I cancel a payout? In "Documents" → "Cancel document". If its fee is already applied in the Stripe invoice, the program answers "This payment's advance has already been applied to a supplier invoice: cancel the invoice first."

Where next

- "Companies" — the "Stripe" account and the payout bank.
- "Orders and invoices" — the monthly Stripe invoice.
- "Documents" — the posted payouts.

Logistics

Delivery

In short

The organisation's carriers and contracts: terms, dispatch warehouses, zones with island postcodes, shipping services with size tiers, rates and surcharges — the delivery cost is calculated from them. From here you also compare carriers and set up delivery for the buyer (the channels' delivery classes, the rules for choosing a carrier and a calculator: the carriers' cost and the buyer price). The buyer price itself is set by the "Delivery" rule in "Markups".

Why it matters

- Know the exact price of a parcel under the contract, with the surcharges for the dispatch date.
- Compare carriers on the same parcels.
- Show the buyer one clear delivery class with a price and a lead time.

Who can

View — salesperson, purchaser, storekeeper and branch manager. Change carriers, contracts and rates — purchaser, branch manager and administrator.

How to do it

1. **Carrier.** "Carrier": code (GLS, DPD, DHL), name and "Counterparty" — a supplier from the counterparty directory (for carrier invoices and balances). If it is not there, "+ New counterparty": the form opens over the window and the counterparty becomes a supplier with the "Transport" role. A carrier without a counterparty is marked "no counterparty".
2. **Contract.** "New contract": number at the carrier, sending company, contract country, dispatch warehouses, currency, volumetric weight and divisor (GLS 6000; DPD and DHL Express 5000), weight step, pickup cut-off and liability.
3. **InPost connection (Poland).** In "Contract terms" choose "Carrier connection" — "InPost (ShipX)" and save; on the "Connection" tab enter the "ShipX organisation number" and "API token" from the InPost panel (Manager Paczek → API), "Test environment (sandbox)" and "How the parcel gets to InPost". The token is stored encrypted and never shown again. By default you drop the parcel at a parcel locker; for "an InPost courier collects" the courier is booked in the InPost panel — the program does not call one. "Check the connection" asks InPost: "The connection works…" or a clear reason. Then parcel-locker and courier shipments are created from the customer order ("Order actions" → "InPost shipment"), and on the website the "pickup point" class of such a contract asks the buyer to choose a parcel locker (search by postcode or city).
4. **Zones.** A whole country or a postcode range; "Exclude" removes places not served. "Upload a file" — the template already has the islands of Spain and Portugal and Corsica.
5. **Shipping services.** Type (parcel or freight), class for the buyer, Saturday, dangerous goods (ADR, LQ), size tiers and forbidden zones.
6. **Rates and surcharges** — on the contract's tabs (fuel, eco, seasonal, Maut…).
7. **Check parcel.** Postcode, dimensions, weight, packaging shape and date: the program shows the

zone, size tier, chargeable weight, itemised price and lead time — or the reason it is refused.

8. **Delivery for the buyer.** Tick the classes the channel offers the buyer ("standard", "express", "pickup point"), their names and "Show carrier". The buyer price is the "Delivery" rule of the price policy: "Delivery price is in "Markups"". Each class shows where its price comes from: the customer policy, the sales channel policy, the channel customer policy (the marketplace, when the channel has no policy of its own), the organisation policy or "previous channel setting" (a price set here before it moved to "Markups"); "Use the price policy" removes the previous setting — only staff with the "Markups" permission see this button. "Check selection" is the calculator: which contract is chosen, the cost, the buyer price and the margin; the "Customer" field shows the price for a customer with their own policy.

Common messages

- **"Counterparty "…" is not marked as a supplier: turn on "Supplier" in its card."** — a carrier is linked only to a supplier: open the counterparty card, turn on "Supplier" and choose it again.
- **"not found — no delivery there"** — the address is not in any zone of the contract.
- **"manual mode"** — no connection module: the label is made by hand, the tracking number is entered and the invoice is uploaded as a file.
- **Chargeable weight above the actual weight** — volumetric weight applies.

Questions and answers

Why does "Check parcel" show no price? Each service shows the reason, for example: "no delivery there: the address is in no contract zone"; "fits no size tier (…)", where the brackets say which limit is exceeded; "heavier than the zone rate accepts (billable weight … kg)"; "no rate for zone “…”: price not calculated". A service can also be blocked for the zone or not take dangerous goods (ADR, LQ).

Why doesn't the parcel price match the carrier's invoice? For example, "per invoice" and "one-off" surcharges are not part of the parcel price: on the carrier's invoice they appear separately. The price uses the surcharge rates valid on the parcel date, and each percentage surcharge is rounded to the cent separately; check that the month's rate is in the contract.

How do I enter this month's fuel surcharge? The contract's "Surcharges" tab → open the surcharge → "Rates by period" → "Rate": "Valid from" and "Contract" → "Save"; for many at once, "Rates from file". Do not delete the old rates: when periods overlap the one with the later start date applies, and parcels of past dates are priced with their own rate. Deleting the surcharge removes it with all its rates.

Can I print the carrier's label from the program? For InPost, yes: with a contract connected to "InPost (ShipX)" the customer order has "Create InPost shipment" and "Label A6" / "Label A4" (the PDF is saved in the order). Other contracts work in manual mode: the label is made outside the program, the tracking number is entered in the program and the carrier's invoice is uploaded as a file.

Why can't I change the shipping contract? Carriers, contracts and rates can be changed by the purchaser, the branch manager or the administrator with a role for the whole company: contracts are shared by all its warehouses. With a role for a single branch, contracts are view-only and there are no buttons to change them.

Where next

- "Product catalogue" → "Data quality" → "Weight and dimensions" — package weight and dimensions.

- "Orders" — shipping and the tracking number.

Staff

Users

In short

Who works in the program and what they can do. Three tabs: "Users" (sign-ins, roles, blocking), "Employees and rates" (all workers with position and hourly cost, including those without sign-in) and "What roles can do".

Why it matters

- Give an employee access with the right permissions, and only where they work.
- Close access for someone who leaves, and know mechanics' hourly cost.

Who can

Sign-ins and roles: the administrator only. "Employees and rates": also the branch manager, for the employees of their branch, their hourly cost and the link to a sign-in (only sign-ins of their branch). The administrator and finance roles require sign-in with a second factor (MFA).

How to do it

1. **Invite.** "Invite employee" → full name, login, interface language, role and "Where it applies" (whole installation, the whole company or one branch) → "Create and issue password". Hand over the temporary password in person: the employee changes it at the first sign-in.
2. **Roles.** On the user card, "Assign role" (several roles in different branches are possible) or "Remove role". What each role gives is in "What roles can do".
3. **Access.** "Reset password", "Reset MFA" (new phone), "Lift sign-in pause" after wrong passwords, "Block" / "Unblock".

- **"Link by email"**: instead of a temporary password, the user gets an email link and sets the new password themselves. The link works once for 30 minutes; the current password keeps working until a new one is set, and the second factor does not change. At most once an hour per user. The card needs an email ("Email for the new-password link": an installation-wide administrator changes it; users change their own with their current password). The link lifts the sign-in pause after wrong passwords; blocking or changing the email, password or second factor cancels a link already sent.
- **"Main user of the installation"**: the software vendor can send them such an email at your request (for example, if all administrators forgot their passwords). Set by an installation-wide administrator.

1. **Employees and rates.** "Add employee" → position, hourly cost, branches. "Program access" is optional: an employee can work without signing in (for example, a mechanic on repair orders).

Common messages

- **"sign-in paused until …"** — many wrong passwords in a row; wait or press "Lift sign-in pause".
- **"password change pending"** — the employee has not signed in with the temporary password yet.
- **"MFA not set up"** on a role that requires a second factor — the program asks to set it up at sign-in.

Questions and answers

Can a user be deleted? No, only "Block": sign-in and all open sessions are closed, while their documents and audit log entries remain. "Unblock" restores access with the same roles. The last installation-wide administrator cannot be blocked: "Not allowed: the installation would have no installation-wide administrator left. Assign another one first."

How many wrong passwords are allowed? After 5 failed attempts within 15 minutes, sign-in with that login is paused for up to 15 minutes: "Too many failed attempts. Try again in … min." Second-factor codes are counted the same way, separately; from one IP address, up to 30 failures in 15 minutes. To lift the pause earlier, the administrator presses "Lift sign-in pause".

How do I change my own password? The program has no screen for it: the password is changed at sign-in after "Reset password". The administrator issues a temporary password, and at sign-in the program asks you to choose your own: at least 10 characters and not containing the login. An administrator does not change their own password, second factor or blocking either: another administrator does.

Why was the employee signed out after a role was assigned? The administrator and "Finance / accountant" roles require a second factor: if the employee has not set up MFA yet, their open sessions are ended, and at the next sign-in the program asks them to set up an authenticator app. "Reset password", "Reset MFA" and "Block" also end their open sessions.

Why can't the administrator see an employee in the list? An administrator of one company or branch sees and manages only users whose roles all lie within their scope. If a user has roles in other companies, an installation-wide administrator manages them: "The user has roles outside your scope: an installation-wide administrator manages them." A user without roles is visible only to an installation-wide administrator.

Where next

- "Audit log" — who did what in the program.
- "Companies" — the branches where roles apply.

Settings

Audit log

In short

The audit log: who did what and when — employees signing in and out, the second factor, sign-in pauses after failed attempts, viewing and changing personal data, documents, settings and money. Entries are never edited or deleted by hand; when a customer is anonymised, the details of their entries are erased.

Why it matters

- Find out who changed a document or a setting.
- Answer a customer or a GDPR inspection about who viewed their data.

Who can

The administrator only.

How to do it

1. **Filter.** Set the period "From" and "To", the "Action", the "Employee" or the "Object (id)" — the full internal record id (shown under "show").
2. **Details.** On the row, "show": what exactly changed.
3. **More.** If there are many entries, "Show more".

Common messages

- **"No entries."** — loosen the filter or widen the period.
- **"customer or system"** — the action was not done by an employee but by a customer via a link or a scheduled task.
- **"Signed in", "Second-factor check", "Signed out"** — employee sign-ins; "show" gives the address (IP). A wrong second-factor code is shown in red. Passwords and codes are not stored; wrong passwords show up as "Sign-in paused after failed attempts" after 5 failures within 15 minutes.
- **"The audit log is available to administrators."** — the log was opened by someone who is not an administrator (for example, the administrator of a single branch).

Questions and answers

Why doesn't a company administrator see all entries? An installation-wide administrator sees all entries; a company administrator sees only their company's entries. Signing in and out, the second factor, viewing customer cards and contacts and exporting their data are logged with the employee's company when all their roles are in one company, so its administrator sees them too. For an employee with an installation-wide role or roles in several companies these entries have no company and, like other entries without a company, are visible only to an installation-wide administrator. An administrator of a single branch has no access to the audit log: the screen answers "The audit log is available to administrators."

How do I find out who viewed a customer's data? Opening a private individual's card or a card's contact list is logged as "Personal data viewed". Pick that "Action" and paste the customer's full id into "Object (id)": it is in the address of their card. A company administrator sees views by their company's employees; an installation-wide administrator sees all of them.

What does an action marked in red mean? The action was refused or failed, for example: posting a document in a closed period, a failed backup or sign-in paused after failed attempts.

Why do customer changes show asterisks instead of the e-mail and phone? The log does not repeat personal data: for the e-mail, the first letter and the domain ("m*@**dominio.es"); for the phone and tax ID, the last three characters; the name, legal name and address show "***" (you only see that the field was filled in, changed or cleared). Payment terms, credit limit, flags and country are shown in full. If the new phone ends in the same three digits, the change shows as "***678** → *678", but the phone did change. The full data is in the customer card.

Are audit log entries ever deleted? Not by hand. The nightly retention clean-up deletes only old access records (signing in and out, the second factor, viewing and exporting personal data and sign-in pauses) under the rules of the country of the entry's company: Spain, older than 3 years; Poland, older than 5. Entries without a company (an employee with an installation-wide role or roles in several companies; a sign-in pause after a wrong password, as the username is not matched to an employee) are kept for the longest period among the countries of the installation's companies (5 years in an installation with Spanish and Polish companies). When a customer is anonymised, the entries about them remain but without details: old and new field values are erased.

How do I inform staff about the log? The log records logins to the program with the IP address and staff actions: in Spain this is a control that employees must be told about in advance (GDPR art. 13, LOPDGDD art. 87, ET art. 20.3). The program does not inform anyone by itself: hand staff the text below (in Spanish, ready to print) with the brackets filled in, and keep the signed copies. In point 2 keep one of the two sentences: whether the log is also used to check compliance with work duties; if not, do not use it for that purpose. Take the period in point 5 from the "Retention periods" screen: in an installation with Polish companies, entries of staff with roles in several companies or the whole installation are kept 5 years. Have your employment adviser check it before handing it out.

> **Información a las personas trabajadoras sobre el registro de actividad del programa de gestión** > > [Empresa], con NIF [NIF] y domicilio en [dirección] (contacto: [correo]; delegado de protección de datos, si lo hay: > [contacto]), le informa, conforme a los artículos 13 del RGPD, 87 de la LOPDGDD y 20.3 del Estatuto de los > Trabajadores: > > 1. **Qué se registra.** El programa de gestión guarda un registro de actividad de cada usuario: los inicios y > cierres de sesión (el cierre, solo cuando el usuario sale del programa), con la fecha, la hora y la dirección IP; > la verificación en dos pasos, incluidos los códigos erróneos; los bloqueos temporales de acceso tras varios > intentos fallidos; la consulta y la exportación de datos personales de clientes y otros contactos, y las > operaciones con documentos, configuración, usuarios y dinero (quién, cuándo y qué se cambió). Además, se > conservan durante 90 días los intentos de acceso (usuario, fecha, dirección IP y resultado), y el servidor anota > en su registro técnico cada petición al programa (usuario, empresa, fecha y hora, dirección IP, función utilizada > y resultado). No se registran contraseñas ni códigos, ni el contenido de la pantalla, ni la ubicación, ni la > actividad fuera del programa. Este registro no es el registro de jornada (art. 34.9 ET). > 2. **Para qué.** Seguridad de la información y control del acceso a datos personales (arts. 5.1.f y 32 RGPD), > trazabilidad de las operaciones contables y fiscales y atención de reclamaciones y requerimientos de clientes y > autoridades. [Elija una frase y borre la otra: «El registro no se utiliza para verificar el cumplimiento de las > obligaciones laborales.» / «El registro se utiliza también para verificar el cumplimiento de las obligaciones > laborales (art. 20.3 ET), con respeto a la dignidad y la

intimidad de la persona trabajadora.»] > 3. **Base jurídica.** Seguridad, control del acceso a datos personales y trazabilidad contable y fiscal: cumplimiento > de obligaciones legales (art. 6.1.c RGPD, en relación con el art. 32 RGPD y la normativa mercantil y tributaria) > e interés legítimo en la seguridad de los sistemas (art. 6.1.f RGPD). Atención de reclamaciones: interés legítimo > (art. 6.1.f RGPD). [Si se usa para el control laboral: ejecución del contrato de trabajo (art. 6.1.b RGPD) y > art. 20.3 ET.] > 4. **Quién accede.** Solo las personas con el rol de administrador en el programa: el administrador de la empresa > ve los registros de su empresa, y el administrador de toda la instalación, todos [indique quién tiene cada rol]. > [Encargado del tratamiento: [proveedor que aloja y mantiene el programa].] [Transferencias internacionales: > [ninguna / país y garantía aplicada].] El programa no permite modificar ni borrar los registros: solo se suprimen > al cumplirse los plazos del punto 5 y, si se anonimiza a un cliente, se eliminan de ellos sus datos. > 5. **Plazo.** Los registros de acceso (inicios y cierres de sesión, verificación en dos pasos, bloqueos temporales, > consultas y exportaciones de datos personales) se suprimen a los [3] años, y las copias de seguridad que los > contienen, a los [35] días. Los demás registros (operaciones con documentos, configuración, usuarios y dinero) se > conservan junto con la documentación contable y fiscal a la que se refieren; el programa no los suprime > automáticamente. El registro técnico del servidor se conserva [plazo del proveedor de alojamiento]. > 6. **Derechos.** Puede ejercer los derechos de acceso, rectificación, supresión, limitación y oposición en [contacto]; > puede oponerse al tratamiento basado en el interés legítimo por motivos relacionados con su situación particular > (art. 21 RGPD), y presentar una reclamación ante la Agencia Española de Protección de Datos (www.aepd.es). > > [Si hay representación legal de las personas trabajadoras: se le informó de este sistema antes de implantarlo para > que pudiera emitir su informe (art. 64.5.f ET).] > > Recibí el original: [nombre y apellidos], [fecha], [firma]

Where next

- "Users" — block access if you find something wrong.
- "Retention periods" — how long log entries are kept.

Backups

In short

When the last successful database backup was made, the backup history and where photos and attachments are stored. You can also make a backup right now and check that all attachment files are in place.

Why it matters

- Make sure data can be restored after a server failure.
- Notice in time that the nightly backup has stopped running.

Who can

Only the administrator of the whole installation: there is one backup for the whole installation, so a company administrator does not see it in the menu.

How to do it

1. **Check the state.** At the top, "Last successful backup: …". A backup runs every night on the server schedule.
2. **Back up now.** "Back up now" — before an update or important changes.
3. **Check attachments.** "Check attachments" — the program checks that all files exist and verifies checksums on a sample.
4. **Where photos are stored.** "On the installation server" (included in the backup) or "EU storage (DPA)" (backups via bucket versions).

Common messages

- **"No successful backups yet"** or a warning about an old backup — check the server schedule or back up now.
- **"Missing files: …; checksum mismatch: …"** — restore those files from the storage backup.
- **"error"** in the history — the backup was not made: tell the server administrator.

Questions and answers

Why can't a company administrator see the backups? Backups, the attachment check and "Back up now" belong to the installation-wide administrator only: a backup covers all companies, so the program does not show it to a company or branch administrator.

Is a separate backup made for each company? No: each backup holds the whole installation database with all companies, plus the attachment files if photos are stored "On the installation server". With "EU storage (DPA)" the files are not in the backup: they are kept via bucket versions.

When does the old-backup warning appear? When there has been no successful backup for more than 26 hours (the nightly backup plus a margin), or there has never been one. If "Back up now" fails, the program shows "Backup failed: …".

How is data restored from a backup? Not on this screen: the server administrator restores it, and only into a new, empty database, so current data is not overwritten. This is also how you test that a backup can be restored (deploy/README.md).

Where next

- deploy/README.md — how backups work on the server and how to test a restore.

Companies

In short

Companies (legal entities), their branches, warehouses and cash registers with company details. The details and logo are printed in the header of estimates, vehicle deposit receipts and invoices, so the screen shows what is missing for documents.

Why it matters

- Correct company details and country mean correct taxes, texts and documents.
- The branch hourly labour rate is prefilled in estimates.

Who can

The administrator only.

How to do it

1. **Company details.** Open the company → legal and trade name, tax number (the check digit is validated), address, phone, IBAN → "Save company details". The country is chosen only on creation ("New company") and does not change afterwards. Logo: "Upload logo" (PNG or JPEG up to 1 MB). The window shows how the header looks on a document.
2. **Branch.** "Add branch" → name, address, "Hourly labour rate excl. IVA" → "Save".
3. **Warehouse and cash register.** On the branch card, "+ warehouse" or "+ cash register" (cash or bank / card terminal). For customer payments by link through Stripe, on a "Bank / card terminal" cash register choose "Payment service: Stripe" (one per company) and "Payouts to account": the bank Stripe transfers the money to (recording those payouts comes in a later version).
4. **Close.** In the warehouse or cash register window, turn off "Warehouse active" / "Cash register active". Only an empty warehouse and a cash register with a zero balance can be closed.
5. **Workshop of another organisation.** On the workshop's card, "Workshop: supplied by organisation" → the organisation that supplies it. The workshop no longer sees our supplier price lists and purchase prices, only its own price lists. Only the installation-wide administrator can change it.
6. **Workshop warehouse and supply routes.** In the warehouse window — "Workshop warehouse: how it gets goods from us". At the bottom of the screen — "Supply routes" → "New route": from, to, lead time in working days and cut-off (orders before it ship today, after it a day later). In analog search another warehouse shows "N days" by its route; warehouses of one branch or at one address show "on site". A workshop warehouse sees other warehouses only through a route.
7. **Warehouse purpose.** In the warehouse window — "Warehouse purpose in the branch": main (receiving and stock), "Workshop", "Showcase", "Online shop". A new repair order goes to "Workshop". After a receipt for orders — "Transfers to where the parts are needed" → "Move": the part goes to the order's warehouse with its reservation (also after receiving a supplier order). In an order — "Move to the order's warehouse" when the part is reserved at another warehouse.

Common messages

- **"Missing for documents: …"** — fill in what is listed in the company details, or estimates and invoices will have gaps.
- **"Tax number missing"** / **"details incomplete"** — the same.
- **"ready to print"** — all details are in place.

Questions and answers

Can a company's country be changed? No: the country is chosen only when the company is created ("Country (laws, taxes, documents)", if the licence has more than one country) and does not change afterwards, because its laws govern all documents. For another country, create a new company.

Can a company be deleted? Only one created by mistake: "Delete organisation" deletes it together with its branches, warehouses, cash registers and staff roles in it, and this cannot be undone. If it already has documents, the program refuses: "The organisation “…” already has documents: it cannot be deleted, documents are kept by law. Close its branches if it no longer operates." The button is available to an installation-wide administrator when there is more than one company.

How do I close a branch, and can it be reopened? First close its warehouses and cash registers ("Close the branch's warehouses and cash registers first."), then turn off "Branch active"; the installation's last active branch cannot be closed. A warehouse closes only with no stock, reservations or goods in transit, a cash register only with a zero balance; a closed branch can be reopened with the same switch.

Can a company administrator create a new company? No: only an installation-wide administrator creates a new company, and only in a country covered by the licence. A company administrator changes the details, branches, warehouses and cash registers of their own company.

Where next

- "Users" — who works in which branch.
- "Reference data" — work types and tax rates.

Go-live: initial data

In short

Transferring data from the previous program, once, when you start with Engrana. The steps go in order: customers and suppliers → customer vehicles → items → retail prices → opening warehouse stock → opening debts. At the bottom: the stock reconciliation and the list of opening debts.

Why it matters

- Start working with your own customers, vehicles, items, stock and debts instead of an empty program.
- Check that stock and debts match the previous program.

Who can

The screen is shown to the administrator and to an employee with a role for the whole company (not one branch), if they have permission for at least one step: customers, vehicles, items, goods receipt or opening debts — for example, Finance / accountant sees "Go-live" for the opening debts. Each step needs its own permission (customers, vehicles, items, goods receipt, opening debts).

How to do it

1. **Every upload works the same way.** "Upload file" → "Download template" → fill it in → "Choose file (CSV, TXT or XLSX)". First the program only checks the file: "Check: nothing has been saved yet" and a list of errors by line. Then "Apply: save N": lines with errors are skipped, the rest is saved.
2. **Order matters.** Customers and suppliers first, then their vehicles (the owner is found by the customer code). Items first, then prices and stock. Debts after customers and suppliers.
3. **Stock** — quantity and cost on the count evening, into the workplace warehouse.
4. **Reconciliation.** In "Reconciliation with the previous program", the stock value at cost must match the previous program.
5. **Opening debts.** A customer debt of the workplace branch is paid right here with "Take payment" (needs the payment permission); a debt to a supplier via "Open invoice", paying it in "Purchases".

Common messages

- **"Columns not recognised and not loaded: …"** — the column names differ from the template: fix the headers.
- **Errors by line** — fix those lines in the file and upload it again. Uploading again creates no duplicates.
- **"no warehouse"** — the workplace has no warehouse: pick a branch with a warehouse at the top.
- **"no permission"** — your role does not allow this step.

Questions and answers

How do I correct opening stock uploaded with a mistake? Not by uploading again: if an item already entered comes with a different quantity or cost, the line fails: "Opening stock for this item has already been entered (… at …) — correct it with a receipt or a write-off." Correct it with an ordinary receipt or write-off in "Warehouse".

Does opening stock change retail prices? An item without a retail price gets one from the company's pricing policy (if one is set), based on the cost in the file, as on a first receipt. For an item that already has a price, opening stock does not change it, so upload retail prices before stock.

Can customer advances be uploaded? No: the debt amount must be above zero, otherwise "The debt amount must be above zero: advances are not loaded." Settle advances in the previous program.

What date do opening stock and debts get? Stock gets the upload date; debts get the invoice date from the file (empty means today; a future date fails the line). Documents cannot be posted in a closed period, so upload before the period is closed.

Who can enter supplier debts? Someone with permission for both supplier invoices and supplier payments: the administrator, Finance / accountant or a branch manager with a company-wide role. A purchaser has no supplier payment permission: the debts step shows "no permission", and a supplier line in the file fails with "No permission to enter supplier debts."

Where next

- "Customers", "Warehouse", "Purchases" — working with the transferred data.
- docs/GO_LIVE.md — the detailed go-live plan.

Integrations

In short

At the top, "Company connections": the tax authority (fiscal invoice issuing, certificate, sending to AEAT) and marketplaces (what is exchanged: stock, prices, orders, payouts). Below, "Data and service providers": each block is connected separately; without a provider the program works manually.

Why it matters

- See whether the company is ready to issue fiscal invoices and what is not set up yet.
- Connect an external service with its key and, if it fails, a backup provider.

Who can

The administrator; a manager with access to the whole company, if they have permission for sales channels or for fiscal settings. The "Data and service providers" block: administrator only.

How to do it

1. **Tax authority.** The block shows the NIF, the company certificate and the "What is missing" list; with sending to AEAT enabled, also "Waiting to be sent to AEAT". Fill in what is missing and the state becomes "ready". The certificate (.p12, .pfx) is uploaded right here and checked at once: password, key of this certificate, whether it works for signing in to AEAT, validity. A self-signed one gets a warning: AEAT only accepts certificates from a recognised authority (FNMT and others). "Check the certificate" repeats the check without sending anything to AEAT. It can be uploaded before sending starts.
2. **Marketplace.** "Connect Allegro" → sign in on allegro.pl with the seller's account → the program comes back here already connected: the "intermediary marketplace" channel and the "Allegro" marketplace customer are created automatically (the same account again: the same connection).

The button is there once the installation administrator has connected the "Allegro application" (below). The channel row shows its condition and "Data exchange"; "Reconnect" if the sign-in was lost. The channel name leads to the marketplace customer card with the channel settings (and the fallback sign-in with a code). **Own website and price list links.** The own website is a "marketplace as agent" channel without a marketplace connection: "Create key" turns on receiving website orders via API and shows the key once (the address and a request example are on the channel orders screen); with "New key" the previous one stops working at once. Price list links are exports with the "Link" delivery method: when the file was updated and how many times it was downloaded; "Copy the link" gives the address for the customer.

3. **Provider.** In an empty block click the provider, paste the key → "Connect". The program checks the key with the provider right away and fills in the rest (for example, the model); if the key is not accepted it says why and saves nothing. "Applies to", the order and other settings are under "Advanced". "Test" sends a trial request.
4. **Backup provider.** "+ Backup provider": it goes after the connected ones (for the same scope: the whole installation or the organisation) and is used if the main one does not respond. An organisation's connection always comes before whole-installation ones. **The model and prices** are shown in the connection row. "Edit" changes the model, prices and "Advanced" without entering the key again: leave the key field empty to keep the saved one; the program checks the connection and saves. ChatGPT has a "Model for voice notes" in "Advanced": audio models do not read photos or PDFs, so voice notes in requests use a separate model and invoices use the main one. Audio costs more than text: enter the voice note prices from OpenAI's pricing page next to it, otherwise their spending is not counted in the monthly AI limit. If voice notes are on and the model cannot handle them, a hint appears under the connection.
5. **Key cannot be decrypted** — "Enter again": the provider and settings are kept.
6. **Document recognition (AI).** The model that reads photos and PDFs of invoices: Claude, ChatGPT, Gemini or "Other, OpenAI-compatible" (Mistral, OpenRouter, your own model). The key comes from the provider's account; the program picks the model from those available to the key (for a compatible service, only if it has one; otherwise enter it; if you change the address, enter the key again). Claude's prices per million tokens are filled in automatically; for ChatGPT and Gemini enter them from the provider's pricing page under "Advanced" (without them the monthly limit is not counted for that provider). "Check" verifies the key and the model at no cost. The backup model is used if the main one does not respond or answers outside the schema. Invoices contain personal data: you need a data processing agreement (DPA) with the provider; for Gemini, a paid key only. Enabling and the spending limit are in the "Invoice recognition (AI)" module under "Modules".
7. **Mail (SMTP).** The mailbox that sends mail to customers and suppliers (estimate link, supplier order, price list to a customer, shop mail). SMTP server, sender address and password (for Gmail and Outlook, an app password from the account security settings) → "Connect": the program logs in to the server and sends a test letter to the sender address; if that fails it says why and saves nothing. Port 587 (STARTTLS) or 465 (SSL) under "Advanced"; the password is never sent without a secure connection. A company's mail goes before the mail of the whole installation; without a connection, mail goes through the mail in the server settings, if there is one. Changed the server — enter the password again.

Common messages

- **"not ready"** for the tax authority — see the "What is missing" list.
- **"key cannot be decrypted"** — the server encryption key changed: "Enter again".

- **"manual"** — the provider is not connected and the program works without it.
- **"The mail server did not accept the user or password"** — Gmail and Outlook need an app password, not the mail login password.

Questions and answers

What is the difference between disabling and deleting an integration? An integration switched off is not used (the block moves on to the next provider or works manually), but its key and settings are kept and it can be switched on again. "Delete integration" removes it together with the key: to bring it back, the key has to be entered again. Both are recorded in the "Audit log".

Can I see a provider's saved key? No: the key is stored encrypted and the program only shows "key saved". To change it: "+ Backup provider" → the same provider and the same "Applies to" → the new key → "Connect"; the integration is updated in place and keeps its order, but enter the "Advanced" values again. The key is a secret: do not send it to anyone.

What should I do if a key has fallen into the wrong hands? For your website key, press "New key": the previous one stops working at once; enter the new one on the website. For a provider key, revoke it in the provider's account, create a new one and enter it as described in the previous answer.

Why can't the administrator see installation-wide integrations? Installation-wide integrations are seen and changed only by an installation-wide administrator; a company's integrations, by an administrator of that whole company. An administrator of a single branch neither sees nor changes connected providers.

Why are invoices not sent to AEAT although the certificate is uploaded? Sending to AEAT is enabled on the server for the mandatory Verifactu date. While it is off, the block shows "not sent to AEAT" and "Sending to AEAT starts on the mandatory Verifactu date; the company certificate can be uploaded and checked in advance." The Verifactu block on the "Companies" screen holds the invoice series and, once sending is on, also the certificate and the sending queue.

Where next

- "Modules" — enabling parts of the program.
- Customer page → "Sales channels" — marketplace settings.

Languages and countries

In short

Interface and server message languages, and the countries whose rules are installed (laws, taxes, documents). A language can be added or corrected without a programmer, using a translation file.

Why it matters

- Each employee works in their own language; documents for the customer are in the country's language.
- Fix an awkward translation straight away, without waiting for a new version.

Who can

Only the administrator of the whole installation.

How to do it

1. **Fix a translation.** On the language row, the "CSV" button (download the template with the current translation) → correct the lines you need → "Upload". The source becomes "built-in + edits".
2. **New language.** "New language" → code, "Name in Russian", "Native name" → "Download template" → translate → "Upload translation". In the template, every text has a context column: where it appears (screen, button, field label, message) and who reads it (employee or customer), so you can translate without searching the program. Only translate the translation column.
3. **Enable and disable.** The "Enabled" switch, on uploaded languages. A disabled language cannot be chosen for an employee.
4. **Delete.** The bin on the row: for an uploaded language, "Delete language"; for a built-in one with edits, "Remove the edits: the built-in translation remains". A built-in language itself cannot be deleted.
5. **Countries.** The list of countries with their fiscal module. A new country is installed by your Engrana provider as a country pack.

Common messages

- **"Rows with outdated keys skipped: N"** — the file has lines that no longer exist in the program; this is not an error.
- **"Could not download the template."** — try again; if it still fails, "Report a problem".

Questions and answers

Which languages does the program have? Russian (the program's source language), Spanish and English are built in. Any other language is added with a translation file via "New language"; a built-in language cannot be disabled or deleted.

What does an employee see if a translation is incomplete? Lines missing from the translation are shown in English. How much is translated is shown in the "Interface" and "Server messages" columns.

Why were some lines of the translation file not loaded? Skipped are, for example, lines with keys that no longer exist in the program, lines with an empty translation and lines whose placeholders in curly braces do not match the source text (the program names the line). The rest is loaded; if no line is usable,

"The file contains no usable translations."

What happens to employees if a language is deleted? For an uploaded language the translation is deleted and employees using it switch to Russian. For a built-in language only the edits are removed: the built-in translation remains and employees keep working in it.

In which language are documents printed and the manual shown? Customer documents are printed in the language of the company's country, not the interface language; in Spain a customer invoice can also be issued in English or German, including bilingual, and a foreign company gets Spanish with English by default. Manual articles exist in Russian, Spanish and English; with another interface language the English article is shown.

Where next

- "Users" — each employee's interface language.
- "Companies" — the company's country.

Manual

In short

The whole program manual: articles by chapter (Getting started, Workshop, Sales, Purchasing, Stock, Finance, Logistics, Staff, Settings) and search by titles, frequent questions and article text.

Why it matters

Find how to do something without knowing which screen it is on. Each screen's article also opens with the "Help" button in the header, which has the "Open full screen" and "Whole manual" links.

Who can

All staff: the articles contain no company data.

How to do it

1. **Search.** Type what you want to do, for example "order from a supplier" or "refund money".
2. **Open by chapter.** Pick the chapter and the article in the contents.
3. **Go further.** Related articles are at the end of each article.

Common messages

- "Nothing found: try other words." — rephrase with other or fewer words.
- "Article not found." — the link is out of date: open the contents.
- "Could not load the help. Refresh the page." — the program was updated: refresh the page.

Questions and answers

Why does the search find nothing? An article is found only if its title, questions or text contain all the words you typed (one-letter words are ignored; case and accents do not matter). The start of a word is enough: "invoic" finds both "invoice" and "invoicing". Cut the query down to one or two key words or try a different word.

Why did the article open in another language? Articles exist in Russian, Spanish and English. If there is no article in the interface language, the English one is shown, and if that is missing too, the Russian one, with the note "There is no article in your language yet — shown in another language."

Why does the article describe a button I don't have? Articles are the same for all staff, but buttons depend on your role and permissions, and often on the state of the document. The "Who can" section says who has that button; if you need the permission, ask the administrator.

Where next

No answer? Ask the program administrator.

Modules

In short

Parts of the program that are enabled separately — for example the online store, tyre storage or invoice recognition. Status is shown for the company selected at the top.

Why it matters

- Enable only what the workshop needs and keep the menu uncluttered.
- Set up a module (keys, limits) in one place.

Who can

The administrator only.

How to do it

1. **Enable.** In the module block, choose "Applies to" (whole installation or the company) → "Enabled for the whole installation" or "Enabled for the company".
2. **Settings.** Fill in the module fields → "Save settings". Secret fields are not shown after saving: "saved: leave empty".
3. **Disable.** Disabling blocks new operations of the module but keeps history and settings.
4. **Connections needed.** The line "Connect these blocks for full functionality" leads to "Integrations".

Licence

At the top is the "Licence" card: the installation number ("Copy" button: the Engrana supplier needs it to issue the licence), terms, users and orders this month against the limits, and accepted files. Upload the supplier's file with "Upload licence"; the program checks the signature, the installation number and that the file is not older than the one already accepted. Orders per month are customer orders from sales channels and the online shop; counter sales, orders entered by hand and orders between two Engrana installations are not counted.

If the server has the address of the Engrana supplier's admin panel, the bottom of the card shows "Admin panel link". It shows the server key and its fingerprint: the supplier links the key to your card on their side, so compare the fingerprint with them by phone or in person. Once an hour the server reports the program version, the time of the last backup, free disk space, and the number of users and orders per month — no customer data or documents — and receives a new licence if the supplier has issued

one. If the admin panel does not answer, the licence and blocks do not change; the reason is shown in the "Last attempt" line.

Common messages

- **"Licence not accepted. …"** — the file was changed, signed with a different key or damaged: ask the supplier for a new one.
- **"The licence was issued for another installation."** — give the supplier the installation number from the card.
- **"The licence is older than the one already accepted."** — upload the newest file.
- **"This version of the program has no licence verification key."** — you can upload it after an update.
- **"not licensed"** — the module is enabled by licence: contact your Engrana provider.
- **"The secret cannot be decrypted. Enter it again."** — the server encryption key changed: enter the module key again.
- **"The company has no own setting: the installation-wide setting applies."** — this is not an error.

Questions and answers

How do I upload the licence file, and what do the "Trial period" and "Payment not renewed" notices mean? "Modules" → "Upload licence". The "Trial period of the … block until …" notice is shown to the administrator and can be hidden until the end of the session. "Payment not renewed" means the block's payment date has passed and it works until the date shown (grace period); the notice stays until a renewed licence is uploaded. After that, a block with data is view-only.

Why does a module enabled for the whole installation not work in a company? The company's own setting takes precedence over the installation-wide one: if the module is disabled for the company, it is disabled there even when it is enabled for the whole installation. Choose that company in "Applies to" and enable the module for it.

What does an employee see if the module is disabled? The module's history can still be opened, but no new module documents are created: "The “…” module is not enabled for this company. An administrator enables it on the Modules page."

Why won't a module switch on? The module has required fields: "To enable the “…” module, fill in “…”." Fill them in and enable the module again. A module marked "not licensed" cannot be enabled by the administrator: the licence is set by your Engrana provider.

Can a company administrator enable a module for the whole installation? No: the installation-wide setting is changed only by an installation-wide administrator, and a company administrator changes only their company's setting. An administrator of a single branch does not change modules.

Where next

- "Integrations" — data and service providers.

Reference data

In short

The program's shared lists: "Work types", "Tax rates", "Units of measure", "Collections" and "Marketplaces", for the administrator. "Product categories" and "Brands" are in "Product catalogue → Reference data"; how to use them is below. Documents keep the values as of when they were created, so editing a list does not change estimates or invoices already issued.

Why it matters

- Work in an estimate is picked from a list with a ready price or time: less typing and fewer mistakes.
- A new tax rate is entered in advance and takes effect on its own on the right date.

Who can

Only the administrator of the whole installation.

How to do it

1. **Work types.** If empty, "Starter set" loads a ready list. Your own: "+ Work type": code, name, category and "How the price is calculated": "Time × branch hourly rate" (estimated time) or "Fixed price". The name is in Spanish: it is printed on the estimate and invoice; "Name translation for staff" (Russian, English, Polish) is how the job appears in lists and appointments. Many jobs at once: "Import", a file with columns code, name, name_ru, name_en, name_pl, category, pricing, standard_hours, fixed_price. "Download template" in the import window gives a ready set of 223 workshop jobs with translations: load it as is or edit it first.
2. **Tax rates.** "New rate version" → rate in % and "Valid from". The old version stays for past documents.
3. **Units of measure.** Unit names in the interface languages.
4. **Product categories.** The category tree and attributes for product cards. «Replace the tree» (for the installation administrator): first load the new tree with «Import categories», then tick only its sections — everything else is treated as the old tree (if all sections are ticked, no old tree is left and the replacement is refused), and for each old category with products or links the program suggests a new last-level one: by its products' kinds («kind → category» rule) or by name. Check and change if needed (or «No category»), then «Apply the replacement»: «kind → category» rules, marketplace links, storefront publication and collections move to the new categories at once, products are moved in the background (progress shows in the window whenever it is opened; «Stop» and, if some products were not moved, «Continue moving») and the old categories are archived. Old categories' attributes are not copied: product values stay free and bind to the new category's attribute with the same name.
5. **Brands.** The brand list: name, full name, TecDoc number, "original" (vehicle maker) and every spelling of the brand ("Bosch", "BOSCH PL", "Robert Bosch" are one brand). In the product card the brand is picked from the list; next to it you see "in the brand list" or "not in the brand list". New brand: "New brand", or "Add brand" right in the card; if a similar brand already exists, the program offers to pick it. Duplicate: open the brand → "Merge into another brand": products and spellings move to the main brand. The whole list can be loaded with "Import" from a file of your previous program.
6. **Brands not in the list.** "Brands" → "Not in the list": spellings on products that are not in the brand

list. Click "This is BOSCH" (a similar brand), "Another brand…" or "Add brand" — the products are linked automatically. Under each spelling there are up to five cards (part number and name) and "All cards". Supplier spellings "OE VW", "OE BMW" are car-maker parts: "Fix: VW, original" sets the make as the brand and quality "O — original" (if not set); "BOS - BOSCH", "S - SASIC" carry the supplier's code in front: "Fix: BOSCH". New product and price-list uploads recognise these spellings on their own.

6a. **Logos.** In the brand card, "Upload logo" (PNG, JPEG or WebP; no SVG); "Brands" → "Without logo": parts brands without one, most products first, and "Logos as ZIP" (the file name is the brand). Vehicle maker brands do not show a logo. The logo appears on the product card and on the product page of the website.

1. **Manufacturer (GPSR).** The brand card has a "Manufacturer (GPSR)" section: the manufacturer's address and contacts and, for a manufacturer outside the EU, the EU responsible person. By law these details are shown in the product offer on marketplaces and the website. The manufacturer's name is the "Full name". "Check status" helps track the work: "to check", "confirmed", "no data". The whole list with these columns loads through the same "Import"; an empty cell changes nothing, "-" clears the field.
2. **Collections.** "Maintenance", "Tyres and wheels" and other top-menu entries of the website and quick filters of the "Product catalogue". A collection is built from tree nodes: a node comes with its branch below; "except" leaves the node's branch out. Products are not copied. Starter collections load with "Import collections" from docs/catalog/collections-start.csv. Which collections the website shows: "Shop" → "Collections".
3. **Marketplaces.** Map the last level of our tree to a marketplace category (Allegro lists only in the last level of its tree): "Select" → suggestions from the node's Polish name and neighbouring nodes, or search. The mapping applies to every product in the node. **Parameters** of a mapped node: where Allegro parameter values come from when listing — category attribute, brand, part number, EAN, name or one value for all products ("Stan" — "Nowy"); for lists, which Allegro value matches ours. A parameter is shared by all categories, so it is set once. "List on Allegro" shows the required parameters without a value. The marketplace tree loads by itself once a day; "Import now" — within minutes. If the category disappears at the marketplace, the node becomes "Needs checking": choose another one. **Via file** — all nodes at once: "Download template" exports every last level of our tree with its current marketplace category and three "number — path" suggestions. Enter the number in the allegro_id column (or copy a whole suggestion); "-" removes the mapping, empty leaves it unchanged; the other columns are read-only. Then choose the file and click "Apply".
4. **Legal forms.** S.L., GmbH, sp. z o.o. and other forms of five countries (ES, PL, DE, FR, IT) for customer and supplier cards: country, abbreviation, full name in the country's language, type (private person, sole trader, company) and whether a registration number is required. "Add form" or "Import" from a file. A form already used by cards cannot be deleted: "Archive" removes it from the choice and keeps it on the cards.
5. **Postal codes.** A "postal code → place and province" list: when you type a postal code in an address, the town and province are filled in if they are empty; for a code with several places, only the one already used in cards is filled in, otherwise type the town yourself. Load it with "Import" from open data: Spain — CartoCiudad (IGN/CNIG), Poland — PRG addresses (GUGiK); put the source in the source column: it is shown in the table. "Clear" removes everything loaded for a country. The Spanish province is filled in from the first two digits of the postal code even without a file. The installation administrator prepares the file for Spain with the cartociudad_postal.py script from the Engrana source code (folder backend/scripts, Python 3.10+ required): download the CartoCiudad

province archives in GeoPackage format from the CNIG download centre (centrodedescargas.cnig.es) and run python cartociudad_postal.py FOLDER -o codigos_postales_es.csv; the result is a file ready to import, one row per "code — municipality" pair, with the source "CartoCiudad © IGN/CNIG (CC BY 4.0)"; the program fills in the province from the postal code.

6. **Archive.** Work types and categories are not deleted: untick "Active" and the record moves to the archive ("Show archived").

Common messages

- **"The starter set is already loaded"** — nothing more will be added.
- **"no price set"** — the work type has no price: it is entered in the estimate.
- **"Only with the Tyres module"** — the work type is visible only when the Tyres module is enabled.

Questions and answers

Why can't a company administrator change the reference data? Work types, tax rates and units of measure are shared by the whole installation, that is, by all its companies, so only an installation-wide administrator changes them.

Can a wrong tax rate be corrected or deleted? Yes, until it takes effect: on the future version, "Delete", then create the correct one. A new rate is created in advance — from tomorrow or later: the rate in force is what price tags, the website and marketplaces are calculated with now, and a mistake would change customer prices at once. A version in force or in the past cannot be deleted; nor can a future one once documents dated from it exist (they were calculated with it). Prices entered in advance from the deleted rate's date are recalculated with the previous rate. A rate cannot be backdated. Enter rates as instructed by the gestor.

What happens when work types are imported again? A work type is matched by code: if it exists it is updated (empty cell: no change; "-": clear the field), otherwise it is created. Estimates and invoices already issued do not change.

Can a brand merge be undone? No: "Merge “…” into “…”? This cannot be undone." Products, numbers and spellings move to the main brand and the duplicate is archived. Brands with different TecDoc numbers are not merged: "The brands have a different … (… and …) — they are different brands."

Where next

- "Companies" — the branch hourly rate.
- The estimate in a repair order, where work types are used.

Retention periods

In short

How long personal data is kept under the law of each company's country, and what the clean-up would affect now: customers and shop buyers to anonymise, those blocked on request, and old access records. Log entries not tied to a company (sign-ins) are kept for the longest period among the countries of the installation's companies, and other data without a company (customers without documents, sign-in attempts) for the shortest.

Why it matters

- Keep data as long as the law requires, and no longer (GDPR).
- See what the nightly clean-up will do before it does it.

Who can

Only the administrator of the whole installation. A company administrator does not see it in the menu: there is one screen for the whole installation. If the installation has companies in different countries and the periods differ, the table row gives them by country, for example "ES: 3 years · PL: 5 years".

How to do it

1. **Rules.** The table: what is kept, the retention period, the reason (law) and what happens next.
2. **Clean-up.** It runs nightly on the server. Manually: "Run clean-up now" → confirm. It cannot be undone.
3. **Erasure on a customer's request** — with "Erase data (GDPR)" in the customer card. If their documents are still kept, the data is blocked until the end of the period and then anonymised automatically.

Common messages

- **"Nothing to clean up now."** — no period has expired yet.
- **"Anonymise customers whose period has expired…? Cannot be undone."** — the confirmation before a manual clean-up.

Questions and answers

What is erased when a customer is anonymised? The name is replaced with "Cliente anonimizado …"; erased are, among other things, the tax number, contacts, address, bank accounts, the previous program's code and the VIES check data; the link to vehicles is removed, and inspection photos, the signature and the signed receipt, customer links, the IP and evidence in estimate decisions, the details of their audit log entries, the marketplace login in orders and the name and phone in bookings are deleted. Documents, amounts and movements remain; the plate and repair history stay with the vehicle, without the person. The data cannot be recovered.

What is the difference between blocking data and erasing it? If none of the customer's documents are still kept, "Erase data (GDPR)" anonymises them at once. If some are, the data is blocked until the end of the retention period: only an installation-wide administrator sees the card, no new documents are issued, and at the end of the period the nightly clean-up anonymises the customer. Only an installation-wide administrator can press the button, stating how and when the customer asked for

erasure.

Are companies and suppliers anonymised when the period expires? When the period expires, the clean-up anonymises only private-individual customers; a company only if its data was blocked at its request, when the block ends. Suppliers are not anonymised by the clean-up on its own (the contract runs while they are a supplier), and contacts marked "inactive" on any card are deleted after 2 years without changes.

What if a supplier asks to erase their data? "Erase data (GDPR)" in their card. If the supplier is a company, its details (name, tax ID, address, accounts) are not personal data and are kept for the documents; tick the contacts of the employees who ask to erase their data: they are deleted at once together with their e-mails and phones in the card ("Supplier contacts deleted: …"). If it is a private individual (a sole trader, also when entered as a "company" with a DNI or NIE), as with a customer: anonymised at once or blocked until the retention period of their documents ends, then the nightly clean-up anonymises them; while the data is blocked, no new documents are issued to them.

Can a blocked customer pay or collect an order? Yes, if the deal started before the block: the data is kept to fulfil the contract and legal obligations (GDPR art. 17.3.b, 18.2). Payment of the debt on an order or repair order, its delivery and invoice, a return, a warranty claim, releasing stored tyres and, with a supplier, the invoice for goods received, its payment, and a return or claim for goods received from them before the block are recorded; each one is written to the log ("Settlement with a blocked party for a deal made before the block"). A new order or repair order, an advance without a source document, a supplier invoice without a receipt (expense) and, in a repair order already open, a new estimate or its approval are not. With erased (anonymised) data, nothing. The invoice for such a deal: an EU company's VAT number is checked in VIES again for every invoice (if VIES does not answer, the invoice is not issued: try again later); the invoice shows only name, number and address, no phone or email, and a simplified invoice carries no buyer data at all. It can be printed or sent once (email to the address on the card); after that only the administrator of the whole installation can (also to the email on the card), and each one is logged. An invoice that goes out by itself (to a website buyer, to Allegro, in the gestor package) is delivered as usual (a legal obligation) and only logged.

Can the signed receipt of a blocked customer be downloaded? The signed receipt with name and signature and the signature image go only to an installation-wide administrator, and each download is logged as "Personal data viewed". Other staff and the customer through the link get the receipt without name or signature.

Does anonymised data disappear from backups? Not at once: old backups are rotated out (the period is in the "Backups" row of the rules table, usually 35 days), and anonymised data disappears with them. If photos are kept in an external EU storage, a deleted photo may remain in its backups for up to 70 days.

Where next

- Customer page — "Erase data (GDPR)" and exporting their data.
- "Audit log" — entries about the clean-up.