

Dolibarr ERP/CRM



Products and Services

Dolibarr ERP/ CRM User Guide

Using Dolibarr's Products and Services Module

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About Dolibarr

Dolibarr is an open-source software available for universal download by the public. It is meant to be used for Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM). Instances of proper use are for, but not limited to, businesses, freelancers, individuals, or organizations, etc, regardless of size to organize their operations.

Customizing Dolibarr

Dolibarr can be customized through the addition of external plug-ins, such as skins or templates, available through Dolistore. There are countless external plug-ins that can be installed through Dolistore [here](#). All downloadable content from Dolistore has been approved and are regulated by Dolibarr. For more information about how you can customize the platform to your individual preferences, visit “Chapter 7: Customizing Your Dolibarr Platform” on page 25 and “Appendix B: Skins and Templates” on page 30.

Dolibarr’s Module Offerings

Dolibarr has 20 modules that can be of use to businesses or any other instances listed above. These modules include: Members, Third-parties, Products & Services, Product & Stock, Warehousing, Shipping, Agenda, Contracts, Expenses, and more. To add other modules, do so by following the instructions in “Enabling the Product and Service Modules” on page 1 for any other modules you wish to add. To view all of Dolibarr’s module offerings, click [here](#).

Installation Methods

Dolibarr offers flexible installation on your devices or is accessible online. It is available on all computers/laptops regardless of brand or operating systems. This makes Dolibarr accessible to users with any variety of available internet-capable technology, user-friendly, and easy to access. You can download version 13.0.1 of Dolibarr from [here](#).

There are customizable setup options that can make Dolibarr function more closely to individual business needs through enabling modules specific for that business's operations for seamless management. For the purpose of this guide, only the associated Product and Services modules needed to function properly will be discussed. Refer to "Chapter 1: Before You Begin" on page 1 for more information on how to get started.

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Chapter 1: Before You Begin

Before you begin using the Products and Services modules, there are some requirements that must be met in order to properly activate the modules. Follow the sections outlined here in order to properly activate these modules.

Note: If you do not activate the modules and complete the topics outlined here, modules will not operate properly. If you encounter any issues using the modules after completing these tasks, refer back to this chapter and ensure you have done everything correctly.

Getting Started

Before getting started, you need permission from a superadmin or admin account to gain administrative permissions after completing the prerequisite topics outlined in this chapter in order. If it is your first time using Dolibarr for your business or organization, you will have superadmin capabilities upon first installation.

| If | Then |
|----------------------|--|
| You are an employee | Request an admin or superadmin to grant you the required permissions to access these modules on behalf of your organization. |
| You are an admin | Proceed to Enable Products and Services Modules and complete the sections in the order they appear. |
| You are a superadmin | |

Enabling the Product and Service Modules

First, enable the Product and Services modules and associated modules for set up by:

1. Download Dolibarr. Open when complete.

Note: Refer to Installation Methods. “Installation Methods” on page ii. Once installed, a superadmin username and password is entered automatically when downloaded.

2. Click **Login**.

Note: If an admin username and password is not available, there was an issue installing. Delete the software and reinstall.

3. Click **Home > Setup**.
4. Click **Setup -> Modules/Applications**.
5. Navigate to 'Product Management (PM)'.
6. Click the button beside the setting wheel on each of the following modules to turn them on:
 - PRODUCTS.
 - SERVICES.
 - STOCKS.
 - PRODUCT LOTS.
 - PRODUCT VARIANTS.

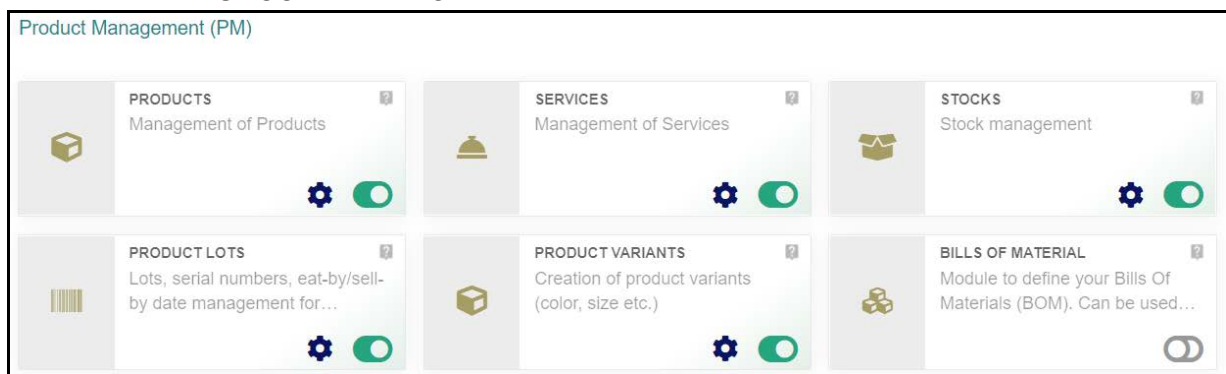


Image 1.1: How Modules Display once Activated

8. Navigate to 'Human Resource Management (HR)' and turn on:
 - USERS & GROUPS.
 - MEMBERS.
9. Navigate to 'Multi-Modules Tools' and turn on:
 - TAGS/CATEGORIES.
 - DATA IMPORTS.
 - DATA EXPORTS.

Creating an Admin Group

In order to use administrative tools, individual users must be added as admins from the superadmin account auto-filled in upon successful installation. To create an admin group of users:

1. Click **Home > Users & Groups > New User**.
2. Insert the required detail for an employee's admin login.
 - a. At minimum, add values for **First name, Last name, Login, and Password**.
 - b. Toggle the administrator setting to **Yes** to attach admin capabilities to that user.

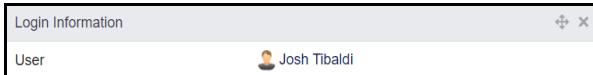
Note: Write down that users login and password to share with who the account is being created for or to remember for yourself.

3. Click **CREATE USER** at the bottom of the page.
4. Repeat steps 1-3 and create all admins you will placing in your admin group.¹
5. Click **New Group** under 'Users & Groups'.
 - a. Name this group 'Admins'.
 - b. Click **CREATE GROUP**.
6. Click **List of Groups > Admins**.
7. Click the drop-down menu and select admins to add those users to the group > click **ADD**.

Generating Associated Module Permissions

Administrators have access granting module permissions. To manually add and set permissions to the Products and Services modules:

1. Login with your admin username and password.
2. Click **Home**.

| If | Then |
|--|--|
| Attaching permissions only for yourself | Scroll down to the bottom right of the page and click Your Name .  Image 1.2: User Login Info |
| Attaching permissions to your Admins group | Click List of Groups > Admins . |

3. Click **Permissions** tab.
4. Besides 'Module/Application,' click **All**.

| Module/Application | All/None | Permissions |
|--------------------|----------|-------------|
| | | |

Image 1.3: Module Permissions Options

1. Tip: You can create unlimited groups. It is best practice to keep admins in one group.

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Chapter 2: Adding a Product or Service

Dolibarr enables you to add your specific products and services, their attributes, details, selling price, manufacturing costs, and all other important aspects to include in one convenient and organized place for reference.

What are Products?

Products are tangible articles, objects, etc, that are made available for sale. Every business or entity sells different products. Products can be anything, including clothing, vehicles, phone cases, or any other physical items that an individual or organization offers for sale.

What are Services?

Services are offerings that provide a commercial purpose to consumers through activities, tasks, etc, as deemed of value. Services can be anything, including editing, legal consultations, dog walking, or any other service an individual or organization could offer in exchange for a set fee.

Adding a Product or Service

To add a product or service:

1. Click **Products/Services** module.
2. Specify which you will be adding:

| If | Then |
|--------------------------|--|
| You are adding a product | Under Products, click New Product . |
| You are adding a service | Under Services, click New Service . |

3. Add the required field of specifications to your product (i.e: color) or service (i.e: time). Use the table on the next page to see what specifications you can add.

Note: There is an overlap in specifications that pertain to either. Product-only and service only specifications outlined separately.

| If | Then |
|--|---|
| You are adding either a product or service | Specify the following details in the allotted fields: <ul style="list-style-type: none"> • Ref. (ID for reference) and label (see images under this table for examples of this). • Set the item’s status for sale and for purchase. • Barcode type and barcode value. • Type the item’s description. • Paste a public URL to your product/service • Attach tags/categories^a. • Selling price (excluding tax), min. selling price (minimum, with tax included). • Tax rate percentage. • Additional notes (not visible anywhere else except on details of that product/service). |
| You are adding a product | Also specify product-exclusive details in the allotted fields: <ul style="list-style-type: none"> • The default warehouse^b the product is being stored in. • Stock limit for alert (for notification to reorder when stock hits X#). • Nature of product (type of product). • Weight, length x width x height, area, and volume. • Customs code (for transport over borders). • Origin country. |
| You are adding a service | Also specify this service-exclusive detail in the allotted field: <ul style="list-style-type: none"> • The duration of the service being offered in time. |

a. Denotes a topic covered later in this guide. To set up Tags/Categories, go to “Chapter 4: Attaching Tags and Creating Product Variants” on page 13. This can be added later.

b. Denotes a to “Chapter 5: Product Stock Warehouses” on page 17 pic covered later in this guide. To set up Warehousing, go to. This can be added later.

Examples:

Note: The same phone retail company will be used for all examples in this guide.

Product Ref. and Label:

| | |
|--------------|---------------------|
| Ref. | IPHONE-12 J.BLK |
| Label | iPhone 12 Jet Black |

Image 2.1 Product Ref. and Label

Service Ref. and Label:

| | |
|--------------|------------------------|
| Ref. | IPHONEX-SCRN-REPAIR |
| Label | iPhone X Screen Repair |

Image 2.2: Service Ref. and Label

Adding a Similar Product or Service through Cloning

You can skip the bulk of adding a similar product or service by cloning it and changing specifications to suite that of a similar one. This can be done in the Products and Services module by:

1. Accessing the details of the product or service you want to clone.

| If | Then |
|---------------------------|---|
| You are cloning a product | Click Products > the product you wish to clone > Product tab. |
| You are cloning a service | Click Services > the product you wish to clone > Service tab. |

2. Click **CLONE** at the bottom right of the screen (the button appears purple).
3. Change the name of the product/service you are adding based on this clone like shown below, the cloned item will then open automatically.

Image 2.3: How to Clone a Similar Product or Service

4. Click **MODIFY** to change the cloned item's specifications.
5. Using the available tabs, change specifications to suite that of the new item.

Note: To see what you can change in each tab, proceed to the next chapter.

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Chapter 3: Making Changes to a Product or Service

In the Products and Services modules, tabs offered through the top tabs (the changes toolbar) enable you to make changes to an item you have already added. Use this chapter to understand the purpose of each tab, how to access the toolbar, and what you can use each tab to change.

Accessing the Product and Service Changes Toolbar

To access the toolbar:

1. Click **Products/Services** module.
2. Specify which item you want to make changes to.

| If | Then |
|---------------------------------------|---|
| You want to make changes to a product | Click Products > the item you want to make changes to. |
| You want to make changes to a service | Click Services > the item you want to make changes to. |

Product Changes Toolbar

The following tabs are available in the product changes toolbar:



Image 3.1: Product Changes Toolbar Options

Service Changes Toolbar

The following tabs are available in the service changes toolbar:

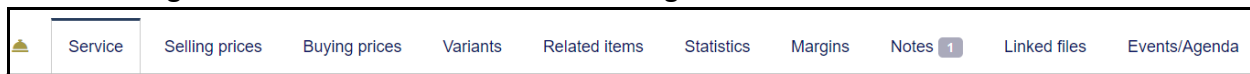



Image 3.2: Service Changes Toolbar Options

What you can do in Each Toolbar Tab

This section outlines what you can do in each of the changes toolbar tabs shown in the Product and Service modules. Refer to overlapping tabs and to module exclusive tabs for options specific to that type of item.

Note: Changes can be made to aspects of an item by clicking , unless specified otherwise. Click on the respective tab from an individual product or service item to make changes.

Overlapping Product and Service Tabs

Here is what you can do in each overlapping tab on the product and service changes toolbar:


| Tab (once on the item, click each tab to access) | Changes you can make to your item by clicking  and what else you can do in that tab: |
|--|--|
| Product/ Service | <ul style="list-style-type: none"> Item type: change an item’s classification as either a product or service. Barcode type: specify the type of barcode for that item. Barcode value: change the barcode number for that item. <p>Note: Click MODIFY at the bottom right of the screen to make additional changes to other specifications.</p> |
| Selling Prices | <ul style="list-style-type: none"> Click UPDATE DEFAULT PRICE to edit default tax rate, selling price, and min. selling price |
| Buying Prices | <ul style="list-style-type: none"> Edit cost price. Click ADD BUYING PRICE to specify vendors the item is purchased from, it’s buying price, and purchasing quantity. |
| Variants | Create and attach variants. Refer to “Chapter 4: Attaching Tags and Creating Product Variants” on page 13. |
| Related Items | <p>No changes can be made here. Instead, you can view the following for each item:</p> <ul style="list-style-type: none"> Contracts. Commercial and vendor proposals. Sales and purchase orders. Customers and vendors invoices. |
| Statistics | <p>No changes can be made here. Instead, you can view statistic graphs related to that item. Statistics are auto-generated and graph contents are explained in that module under each graph.</p> <p>Click on Statistics to view available products/services graphs.</p> |

Table 3.1: Overlapping Products and Services Toolbar Tabs


| Tab (once on the item, click each tab to access) | Changes you can make to your item by clicking  and what else you can do in that tab: |
|--|---|
| Margins | No changes can be made here. Instead, you can view margin details for invoices. |
| Notes | <ul style="list-style-type: none"> Edit public notes. Edit private notes that will not appear on invoices. |
| Events/Agenda | No changes can be made here. Instead, you can view details about when the item was created, sequence of modifications, and who made them. |
| Linked Files | <ul style="list-style-type: none"> Click UPLOAD to attach a new file/document to that item, including an image to appear for that item. Click LINK to link a file/document to that item and specify link details. |

Table 3.1: Overlapping Products and Services Toolbar Tabs

Product and Service Exclusive Tabs

All service tabs are specified in the table above, beginning in “Overlapping Product and Service Tabs” on page 10. There is one additional product-exclusive tab not expressed there. It is the:

Stock tab. Here, you can change the following specifications by clicking the  icon:

- Stock limit for alert: change minimum stock for and alert to reorder soon.
- Desired stock: specify stock desired for that product.
- Click **CORRECT STOCK** or **TRANSFER STOCK** to specify what warehouse that product is stored in.

Note: Refer “Chapter 5: Product Stock Warehouses” on page 17 to set up product warehouses.

Deleting a Product/Service

To delete a product or service item:

- Click the **Product/Service** module.
- Navigate to the item you want to delete.

| If | Then |
|------------------------------|--|
| You want to delete a product | Click Products > the item you want to delete. |
| You want to delete a service | Click Services > the item you want to delete. |

- Click **DELETE** at the bottom right.

Note: Once a product/service has been deleted, there is no way to retrieve it unless you create it from scratch or through cloning a similar item.

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Chapter 4: Attaching Tags and Creating Product Variants

This section discusses all things tags and variants within the Products and Services modules.

What is a Tag?

Tags are custom field categories that you can group your products or services into. You can attach tags to view your items by your tags. Viewing by tags shows all of your products or services associated with that tag in one organized place. Tags are used to stay organized and makes locating grouped items convenient.

Creating Tags

To create custom tags for your items:

1. Click **Products/Services** module.
2. Click **Tags/Categories**.

| If | Then |
|--------------------------------|--|
| You are creating a product tag | Click Tags/Categories under products. |
| You are creating a service tag | Click Tags/Categories under services. |

3. Click the  icon to create a tag.

Note: Any tags created under products will also show up for services and vice-versa.

4. Add the following specifications to your tag in the corresponding fields:
 - Ref.: what you want to name your tag.
 - Description: an associated tag description for more details.
 - Color: the color you want your tag to appear in.
 - Add in: create a tag as a sub-tag to another tag by choosing a parent tag here.
5. Click **CREATE THIS TAG/CATEGORY**.

Editing and Grouping Tags

To group and edit tags that you have already created:

1. Click on the tag you want to edit or group under a parent tag.
2. Specify whether you want to modify or delete a tag.

| If | Then |
|--------------------------|-----------------------|
| You want to modify a tag | Click MODIFY . |
| You want to delete a tag | Click DELETE . |

3. Edit your tag accordingly by making changes to the specifications you entered in step 4 of “Creating Tags” on page 13. You can group them using the ‘Add in’ field.

Once grouped, tags look like this:

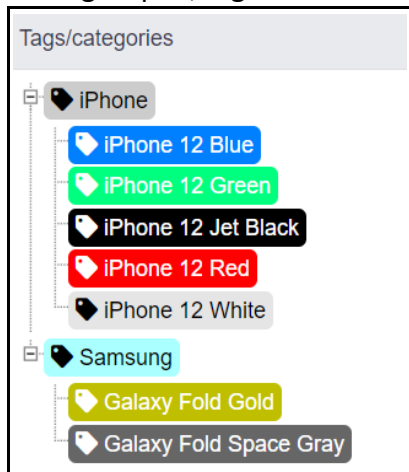


Image 4.1: Grouped Tags for Phone Colors

Adding Products/Services to Tags and Removing Them

To add products/services to tags and remove products/services from tags you have created:

1. Click **Tags/Categories** under Products or Services.
2. Click the tag you want to add products/services to.

Note: You can attach both products/services tags simultaneously. Items can be attached to both parent and sub-tags the same way.

3. In the ‘Add the following product/service’ field, use the drop-down menu to specify which products/services you want to add to that tag by adding one product/service at a time.
4. Click **ADD TO TAG/CATEGORY**.
5. Click **REMOVE FROM TAGS/CATEGORIES** to remove a tag from a selected product/service.

Viewing Associated Products/Services by Tag

To view products/services by tags:

1. Decide whether you want to view products or services by tags.

| If | Then |
|-----------------------------------|--|
| You want to view products by tags | Click Tags/Categories under products. |
| You want to view services by tags | Click Tags/Categories under services. |


2. Select the tag you want to filter your products or services by.
3. Under Products and Services, you can view all the items attached to each tag.

What is a Product Variant?

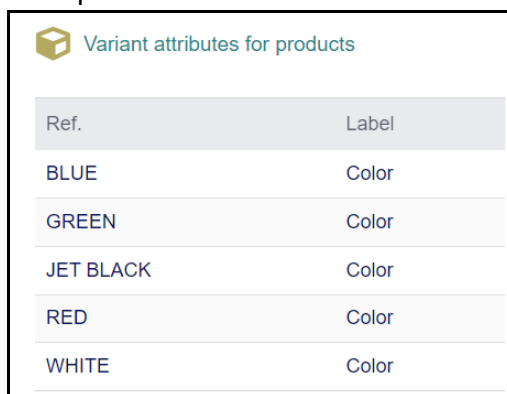
A product variant is an additional specification, similar to tags, that you can add to represent additional specifics for your products. Typical use of variants specify color and size, however options are limitless. You can add an unlimited amount of variants one at a time.

Adding a Product Variant

To add a product variant:

1. Click **Variant Attributes** under Products.
2. Click the  icon to create a new variant.
3. Specify the following in the allotted fields:
 - Ref. (reference) id.
 - Label (what the variant is representative of).
4. Click **CREATE**.
5. Repeat steps 1-4 to create additional product variants.

Example of added variants:



| Ref. | Label |
|-----------|-------|
| BLUE | Color |
| GREEN | Color |
| JET BLACK | Color |
| RED | Color |
| WHITE | Color |

Image 4.2: Example of Added Variants for Phone Colors

Attaching a Variant to Products

To attach the variants you have created to individual products:

1. Click **Products**.
2. Click on the item you want to attach a variant to.
3. Click on the **Variants** tab.
4. Click **New Variant**.
5. Specify the following from the drop down menu:
 - Variant attribute
 - Value
6. Click **SELECT COMBINATION**.

Chapter 5: Product Stock Warehouses

This section will discuss everything related to warehouses. This includes how to add a warehouse, make changes to stock, and movements of stock between warehouses.

What is a Warehouse?

A warehouse is where product stock is held, received at, or shipped from. Warehouses can be located anywhere in the world and hold all types of stock for all businesses.

Note: Shipping is usually overseen by a shipping manager. Reach out to your manager or boss to discuss who is in charge of shipping for more information.

Adding a Warehouse

To add a new warehouse:

1. Click **Products/Services** module.
2. Click **New Warehouse** under Warehouses.
3. Add the following information to your new warehouse in the allotted fields.
 - Ref. (reference) name
 - Short name location
 - Description
 - Location details: address, zip code, city, country
 - Phone and fax numbers
 - Status (whether the warehouse is opened or closed)
 - Tags/categories (refer to Warehouse Tags below to create and apply them)
4. Click **CREATE**.

Once a warehouse has been created, it will look like this:



Image 5.1: Example of a Warehouse after Creation

Making Changes to a Warehouse

To make changes to a warehouse’s specifics you have already created:

1. Click **Warehouses**.
2. Click the warehouse you want to make changes to.
3. Specify if you will be making changes or deleting that warehouse.

| If | Then |
|---|-----------------------|
| You want to edit that warehouse’s specifics | Click MODIFY . |
| You want to delete that warehouse | Click DELETE . |

4. Modify warehouse details specified in step 3 of Adding a Warehouse: “Add the following information to your new warehouse in the allotted fields.” on page 17.
5. Click **SAVE**.

Specifying Stock and Transferring Stock Between Warehouses

To specify warehouse product stock and transfer stock from one warehouse to another:

1. Click **Warehouses**.
2. Drag the bar to the far right and click the warehouse you want to change stock in like so:

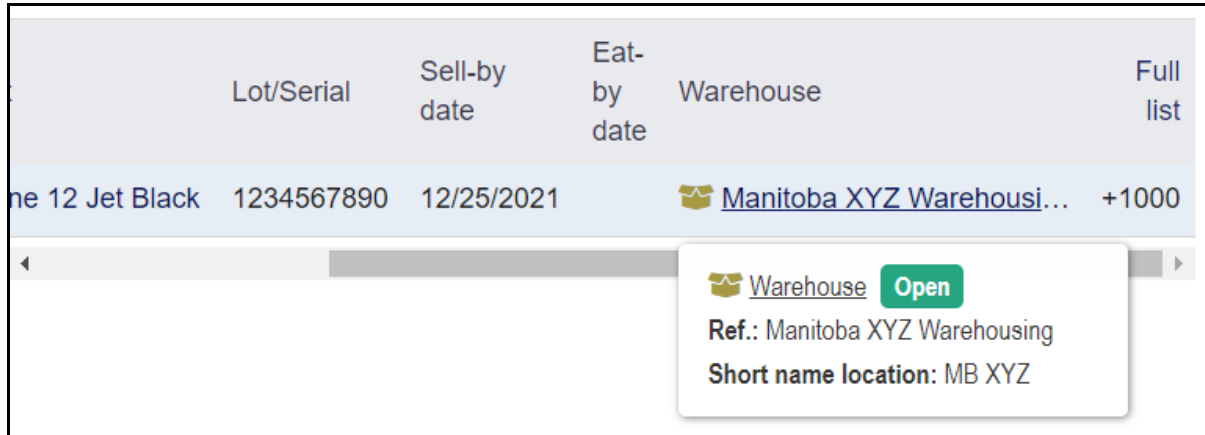


Image 5.2: Selecting a Warehouse to Change it’s Stock

3. Click **Stock Movement** tab.

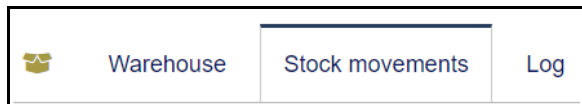


Image 5.3: Warehouse Stock Movements Tab

4. Specify if you will be adding product stock or transferring stock between warehouses:

| If | Then |
|---|-------------------------------|
| You want to add product stock to a warehouse | Click CORRECT STOCK . |
| You want to transfer stock between warehouses | Click TRANSFER STOCK . |

5. Add the following information for stock at this warehouse in the allotted fields:

| If | Then |
|---|---|
| You clicked CORRECT STOCK or TRANSFER STOCK | Specify the following: <ul style="list-style-type: none"> • Specify which product is being stored here. • Number of units and unit purchase price. • The product's lot/serial number. • Sell-by-date and eat-by-date (if applicable). |
| You clicked TRANSFER STOCK | Also specify: <ul style="list-style-type: none"> • The target warehouse this stock is being moved to. |

6. Click **SAVE**.


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Chapter 6: Sharing and Importing Modules

This section will discuss how to share your Product and Service modules related areas covered in this guide for other admins to open and how you can open shared modules in Dolibarr.

Sharing Your Modules

How to export your modules one by one:

1. Click **Tools** module.
2. Click **New Export** under Export Assistant.
3. Select the module you would like to export using the  icon to the far right.

Note: The following image shows which module aspects you can export to cover all material added through this guide. All additional Dolibarr modules can be exported from here.



Image 6.1: Some of Dolibarr's Exporting Options

4. Click **All** from the toolbar options.



Image 6.2: Exporting Toolbar Options

5. Click **NEXT STEP** at the bottom right of the page, and then click **NEXT STEP** on the next page.

Note: No manual values need to be added if all has been selected.

6. Enter an export profile name at the bottom of the page and click **SAVE** beside the field.

Note: The export profile name will be what your exported module is called.

7. Click **NEXT STEP > NEXT STEP** again on the next page.


- Specify what kind of file you will be exporting your modules through.

| If | Then |
|---------------------------------------|--|
| You want to export as plain text file | Select csv from the drop down menu. |
| You want to export as an excel file | Select Excel 2007 from the drop down menu. |

- Click **GENERATE**.
- Click on the name of the generated file to download it.

Importing Modules

How to add shared modules to your Dolibarr software:

- Click **Tools** module.
- Click **New Import** under Import Assistant.
- Click the  icon beside the module you would like to import.

Note: The image below shows all module aspects covered in this guide. All additional Dolibarr modules can also be exported from here.









| | | |
|-----------------|-------------------------------------|---|
| Tags/Categories | List of tags/categories (all types) |  |
| Products | Products |  |
| Services | Services |  |
| Stocks | Warehouses |  |

Image 6.3: Some of Dolibarr's Importing Options

- Choose what type of file you will be importing.

| If | Then click the  icon |
|--------------------------------------|---|
| You want to import a plain text file | To the far right of csv. |
| You want to import a excel file | To the far right of Excel 2007. |

- Click **Choose File** and select the file you want to import.
- Click **ADD FILE**.
- Import your file.

| If | Then |
|-----------------------------|---|
| You selected the wrong file | Click the  icon. Repeat steps 4-7. |
| You selected the right file | Click the  icon. |

- Click **NEXT STEP**.

9. Click **RUN IMPORT SIMULATION**.

Note: If an error displays, the file was not imported properly. Try again and ensure you are specifying the correct file type. If it still displays an error, as the person who shared the module with you to share it again or export it again if it is still unsuccessful.

10. Click **IMPORT DATA**.

Restart Dolibarr to view the imported file contents in that module. Navigate to the module you have imported to view and make changes to it.

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Chapter 7: Customizing Your Dolibarr Platform

This section will discuss how to customize your Dolibarr platform using downloadable skins and templates from Dolistore. To view some popular skins and templates you can download and where you can do so, refer to “Appendix B: Skins and Templates” on page 30.

What is DoliStore?



Image 7.1 DoliStore Logo

Dolistore is the official market place for external plug-ins and add-ons for Dolibarr. Some are free and others are paid. Dolistore offers different options for downloadable skins and templates you can import into the software customizable the platform.

You can access Dolistore [here](#). To view all skins and templates offered on Dolistore, click [here](#).

What is a Skin?

A skin is an external add-on that changes the look of your software by customizing colors through a theme. Skins do not change the contents of your Dolibarr platform. Skins only change the colors of your downloaded Dolibarr software and do not disrupt how modules function. You can follow this guide and perform tasks the same way as outlined with a skin added.

What is a Template?

A template is an external plug-in that adds additional fields to a module. Modules with templates installed export with those fields added. When importing a module with a template included, it will automatically add the associated fields with that add-on to your module during import. You can follow this guide and perform tasks the same way as outlined with a template added.

Downloading a Skin or Template

How to download a Dolibarr compatible skin or template from Dolistore:

1. Click Skins and Templates under categories.

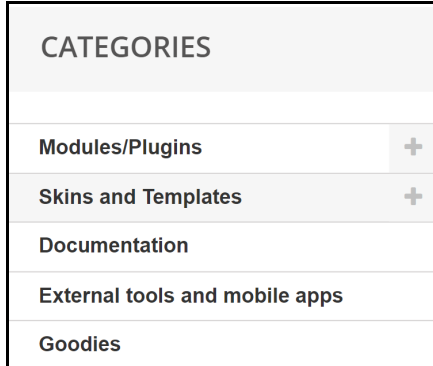


Image 7.2: Viewing Skins and Templates on Dolistore

2. Hover your mouse over the item you want to download and click **More**.
3. Complete payment if you will be downloading a paid skin or template.

| If | Then |
|---|---|
| You will be downloading a free skin or template | Continue to the next step. |
| You will be downloading a paid skin or template | Click Add to Cart > Proceed to Checkout in the popup. You will be taken to the checkout area. Follow the prompts and checkout, then return to the theme's webpage on Dolistore. |

4. Click the underlined .zip file name under DOWNLOAD to begin doing so.

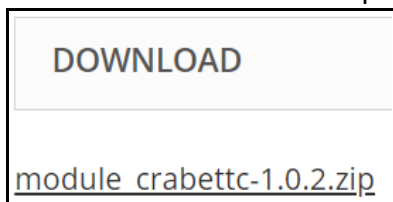


Image 7.3: Downloading a Skin or Template

Note: If you are adding a paid template, this field may be locked. Allow an hour from when you completed payment for it to unlock. Complete this step once it has been unlocked.

5. Drag the downloaded file onto your desktop for easy importing.

Your skin or template is now ready for import.

Importing a Downloaded Skin or Template

To import a downloaded skin or template downloaded from Dolistore:

1. Click **Home** on your Dolibarr platform.
2. Click **Setup > Setup -> Modules/Applications**
3. Click **Deploy/install external app/module**.



Image 7.4: Deploy/Install External Modules Tab in Setup

4. Click **Choose File** and select the downloaded .zip file for import or drag it from your desktop.

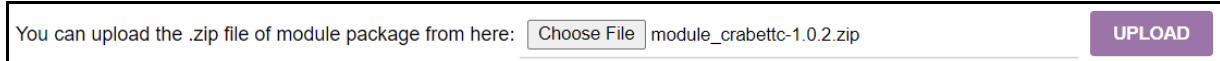


Image 7.5: Preparing your External Plug-in for Import

5. Click **UPLOAD**.

Note: If an error displays, the file was not imported properly. Try again and ensure you chose the correct .zip file. Ensure you have a stable WI-FI connection before trying again. If your connection is interrupted during import, an error message will display.

6. Restart your Dolibarr platform.

Restart Dolibarr and your imported skin or template will take effect upon login.

Note: Only one skin can be active at a time. If you import multiple skins, your most recently imported skin will take effect. You can add an unlimited amount of templates into Dolibarr.

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Appendix A: Glossary

| | |
|-------------|--|
| admin | an employee with administrative abilities that are not available to all employees. |
| admin group | a group of admins created by all levels of admins. |
| cloning | duplicating a product/service to eliminate adding similar fields again adding an item similar to one already created. |
| Dolistore | the official market place to download plug-ins for Dolibarr |
| importing | adding a shared document into a software. |
| module | an aspect of the software that users need to manual activate upon first use of Dolibarr. |
| permissions | a users ability to use aspects of Dolibarr set by an admin. |
| products | products are tangible articles, objects, etc, that are made available for sale; every business or entity sells different products. |
| services | offerings in exchange for a set fee that provide a commercial purpose to consumers through activities, tasks, etc, as deemed of value. |
| sharing | the act of downloading one of your Dolibarr modules available to send to another employee; also referred to as exporting. |
| skin | an external add-on available from Dolistore that changes the look of your Dolibarr platform through color themes. |
| superadmin | an admin with full, unrestricted access to the Dolibarr module than other admins. |
| stock | the quantity of a product owned or being stored. |
| tags | custom field/categories which group products or services; you can view your items by tags to show all products or services associated with it. |
| template | an external plug-in from Dolistore that enhances a module. |
| toolbar | options of tools/sections located in a bar at the top of that page. |
| warehouse | where product stock is held, received at, or shipped from anywhere in the world. |
| variants | an additional specification, similar to tags, that you can add to represent additional specifics for your products. |

Appendix B: Skins and Templates



DolistoStore is the official market place to download plugins and add-ons for the Dolibarr ERP/ CRM software. DolistoStore offers different options for downloadable external plug-ins, including skins and templates, which you can import into the software to customize your platform. You can access DolistoStore [here](#).

To download a skin or template, understand what they are, and import them into your Dolibarr platform, refer to “Chapter 7: Customizing Your Dolibarr Platform” on page 25.

Free Compatible Templates for Dolibarr version 13.0.1

Most free options are outdated and run on previous versions of Dolibarr. There is one free template compatible with this version. The free template compatible with this version is:

PDF Crabe AIT

| Montants exprimés en Euros | | | | | | |
|--------------------------------------|-------|---------|-----|--------|-----------------|-----------|
| Désignation | TVA | P.U. HT | Qté | Réduc. | Total HT | Total TTC |
| Prodlmg - Description 0 | 19,6% | 100,00 | 1 | | 100,00 | 119,60 |
| Prodlmg - Description 1 | 19,6% | 100,00 | -1 | | -100,00 | -119,60 |
| Description 2 | 19,6% | -100,00 | 1 | | -100,00 | -119,60 |
| Prodlmg - Description 3 | 19,6% | 100,00 | 1 | 50,00% | 50,00 | 59,80 |
| Prodlmg - Description 4 | 19,6% | 100,00 | 1 | | 100,00 | 119,60 |
| Prodlmg - Description (offered line) | 19,6% | 100,00 | 1 | Offert | 0,00 | 0,00 |
| Conditions de règlement: A réception | | | | | Total HT | 50,00 |
| | | | | | Total TVA 19,6% | 9,80 |
| | | | | | Total TTC | 59,80 |

About:

PDF Crabe AIT template is a document model for PDF exports that adds an AIT column in bills and credit notes.

Who can use it?

This skin is used for overseeing billing in a more organized way. If you do not use Dolibarr for billing, this skin is not a good fit for you.

Where can I download it?

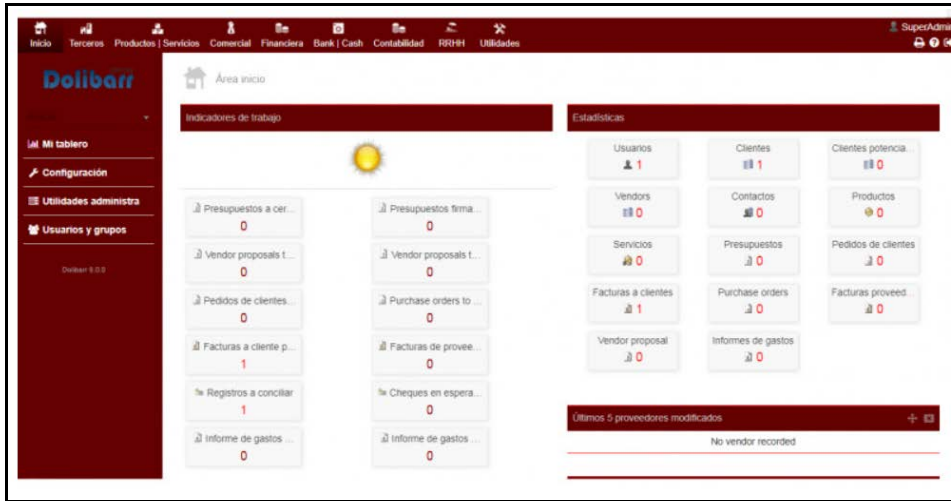
From the DolistoStore website, [here](#).

Popular Paid Skins for Dolibarr version 13.0.1

There are countless paid skins Dolistore offers that vary in price. The next pages outline popular and affordable options to consider. Skins only change the colors of your Dolibarr platform. Upon installation and restarting your Dolibarr software, your platform to appear as outlined in that skin and the language will auto-change to the language your software is running on.

Dolistore is based in Europe and their pricing is exclusively in Euros. To discover how much they will cost in your respective currency, convert the price to that currency. To view all Dolistore’s skin and templates, click [here](#).

Kenia



About:

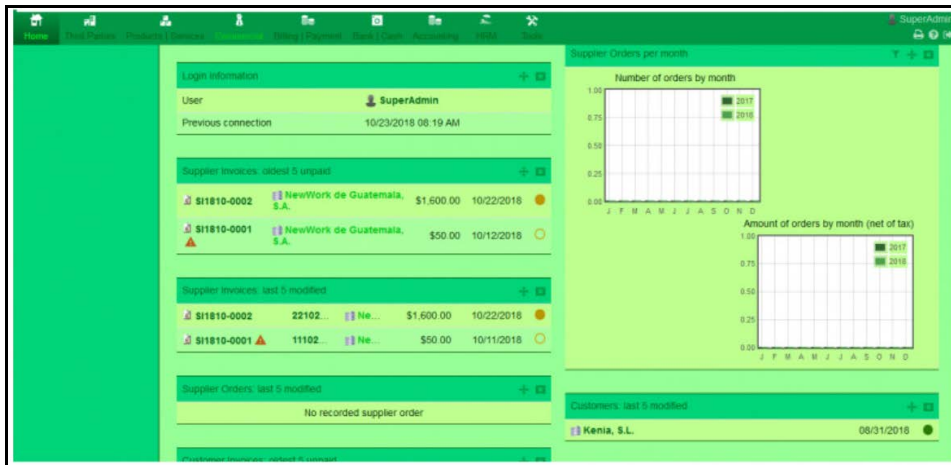
Kenia theme adds a warm dark-red skin to your software.

Price: 6.00 €

Where can I download it?

You can download it from Dolistore [here](#).

Dayelin Summer



About:

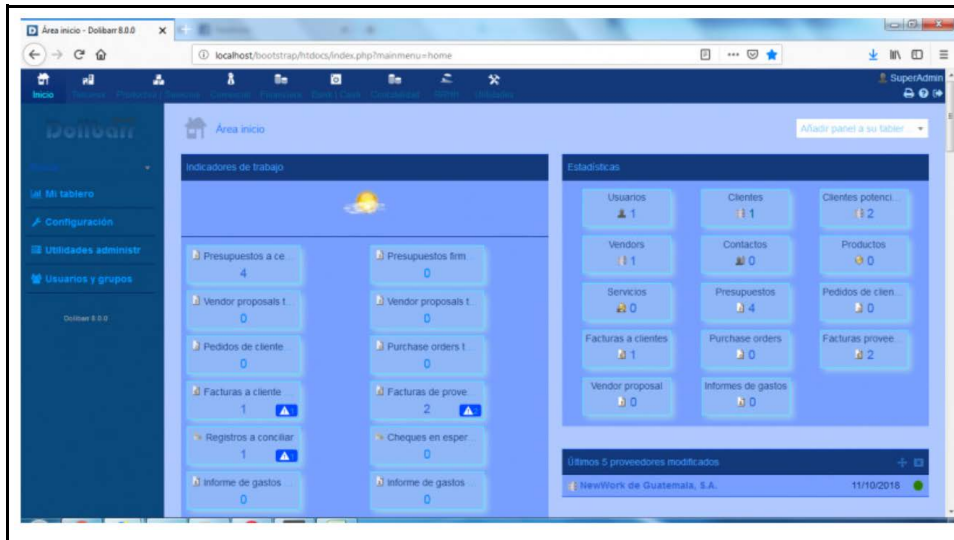
Dayelin Summer theme adds a vibrant green skin.

Price: 6.00 €

Where can I download it?

You can download it from Dolistore [here](#).

Mar Blue



About:

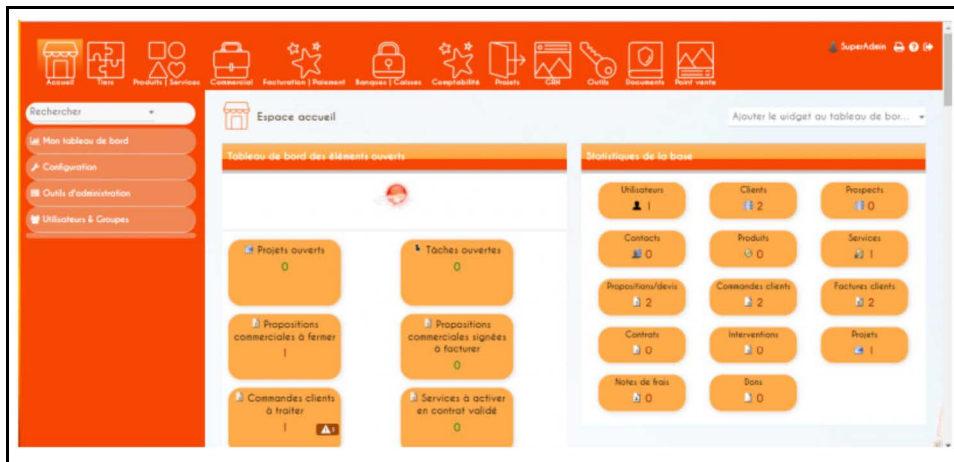
Mar Blue theme adds a shades of blue skin.

Price: 6.00 €

Where can I download it?

You can download it from Dolistore [here](#).

BORTOQAL



About:

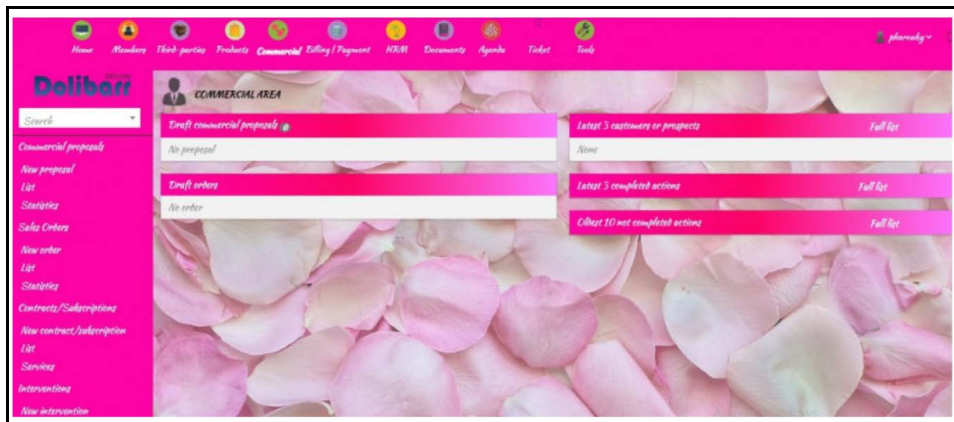
BORTOQAL theme adds a orange-hued skin.

Price: 12.00 €

Where can I download it?

You can download it from Dolistore [here](#).

WARDI



About:

WARDI theme adds a pink floral skin.

Price: 13.00 €

Where can I download it?

You can download it from Dolistore [here](#).

Theme Customizer



About:

Theme Customizer enables you to create your own skin theme for your Dolibarr platform. After downloading, it will display instructions to create your own theme and share it with others in your business, etc.

Price: 24.00 €

Where can I download it?

You can download it from Dolistore [here](#).

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