Nuclet: Base Nuclet for trading companies

Language: Deutsch · **English**

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> **Data sheet and documentation entry point for the Base Nuclet for trading companies Nuclet (base data model and processes for trading companies (orders, articles, customers)).**

CONCEPT | INTEGRATORS | UPDATED: JUL 2026 | APPLIES TO NUCLOS 4.2026.X

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Machine-translated – under review

This page was machine-translated from German as a first draft and is currently under review. The authoritative source remains the **German original** (see the language switch above).

Releases

Version	Date	Notes	Compatibility
1.2.1	<in the near future>	First published version	from Nuclos 4.2024.8

Overview

This Nuclet contains functionalities for

- trading processes
- warehouse management
- form printing and
- email sending

and thus offers the ideal starting point for your individual ERP system.

Integration

Step	Description
1	If you have not already done so, activate multilingualism in your current system (see topic Datensprache), if applicable only with the primary language "German (DE)"
2	Import the Nuclet into your Nuclos system (see topic Nuclet import)
3	Run the job "Initialisiere Nuclet Handel"; this creates technically necessary data such as number ranges, form field labels and stock movement types.

4	Create a new record under Master data > Organisation and fill it with the existing data of your company
5	For a quicker start into development or testing, you can have the job "Create sample data" generate some sample data (organisation, employees, customers, articles, ...).
6	Adjust the Nuclet parameters in the base Nuclet if needed
7	If you want to use email sending, please create and fill the Systemparameter für den Mailversand and activate the created email templates.
8	If you want to use the DATEV export, please note points 4.4 and 4.6 of the DATEV-Integration
9	If you want to use SEPA, please adjust the Nucletparameter für SEPA in the SEPA Nuclet
10	If you want to use CAMT import, please adjust the Nuclet parameters in the CAMT Nuclet

User functions

Master data

- **Employees**
  - It saves a little work if you first create the Benutzer and then the employee. If you then specify the associated user in the employee, the data entered in the user (name, first name, ...) is automatically transferred to the employee. Assigning employees to users is not mandatory, but helpful (see below)
  - Roles can be assigned to an employee. These roles control in which BOs this employee is available for selection as an editor. For this to work, the names of the roles must not be changed, or the parameters for the Value list provider must then be adjusted in the affected layouts.
    - Order management => quotation, sales order
    - Accounting => outgoing invoice, credit note
    - Procurement => purchase order, incoming invoice
    - Warehousing => stock-in, stock transfer, stock-out, stock inventory
    - Goods issue => delivery note
  - If an employee is assigned to a user, and this employee is active and has e.g. the role "Auftragswesen", the field editor is automatically filled with the current employee when they create a quotation or sales order. The same applies analogously to other roles.

Business partners

- **Customers**
  - Addresses
    - If an address is marked e.g. as "billing address", it is offered as the billing address e.g. in a sales order for this customer
    - If this address is additionally marked as "billing address (default)", this address is automatically inserted as the billing address when a new sales order is created for this customer.
    - The same applies to the delivery address
  - Contacts
    - If a contact is marked as "default?", it is automatically inserted as the contact when e.g. a new sales order is created for this customer.
    - The language of the contact is also transferred into the sales order (and other BOs) and determines the language in which forms are printed.
  - Sales prices
    - Here you can assign each customer separate sales prices for certain articles that differ from the general sales prices
- **Suppliers**
  - Addresses
    - If an address is marked e.g. as "order address", it is offered as the order address e.g. in a purchase order for this supplier
    - If this address is additionally marked as "order address (default)", this address is automatically inserted as the order address when a new purchase order is created for this supplier.
  - Contacts
    - If a contact is marked as "default?", it is automatically inserted as the contact when e.g. a new purchase order is created for this supplier.
    - The language of the contact is also transferred into the purchase order (and other BOs) and determines the language in which forms are printed

Articles

- **Properties**
  - Sales article = an article that is offered in procurement (e.g. in a purchase order item)
  - Purchasing article = an article that is offered in order management (e.g. in a quotation item)
  - Stock-managed = an article that is relevant for warehouse management, i.e. can be stocked in, out and transferred. It can have stock levels and stock movements.
  - Default warehouse, default storage location = this data is inserted by default e.g. into sales order items for this article
  - Serial-number-managed = this article mandatorily requires a serial number
  - Batch-managed = this article mandatorily requires a batch
- **Unit of measure**

    - A unit of measure can be specified for each article (e.g. piece, kg)
    - For each unit of measure, conversions into other units of measure can be defined (e.g. 1 kg = 1,000 g)
    - This gives you the option to specify the quantity e.g. in a quotation item in g instead of kg.
- **Availability**
    - Based on stock levels and purchase orders, the availability (in shipping warehouses) of an article can be calculated
    - Stock - reserved > 0 => In stock
    - Ordered > 0 => Ordered
    - Otherwise => Not available
- **Sales prices**
    - A sales price can be specified here
    - Customer-specific sales prices can be specified (see also Business partners - Customer)
    - Price group prices can be specified, i.e. a different price applies if a customer belongs to a certain price group (e.g. VIP, business customer, etc.)
    - Graduated prices can be specified (different prices depending on the sales quantity)
    - The hierarchy is
        - customer-specific price
        - price group price
        - graduated price
        - sales price
    - i.e. it is checked from top to bottom whether there is a matching entry, and as soon as one is found, it is used.
- **Purchase prices**
    - Several suppliers with different purchase prices can be specified
    - A default supplier can be defined
    - For each supplier, a minimum order quantity and graduated prices can also be defined
    - A purchase order for this article must respect both the minimum order quantity for the article and for the supplier

Sales

- **Documents**
    - Documents are e.g. sales orders, delivery notes, outgoing invoices, credit notes, purchase orders or incoming invoices. They are all structured quite similarly
    - All documents follow their own state models with firmly defined state changes (see Status model).
    - Documents should not be deleted, but rather transferred to the status *Storniert* (if possible), so that e.g. stock reservations that have been made are cleanly rolled back.
    - A document contains information about the customer, addresses, contacts and language; with appropriate customer configuration, these are filled automatically after selecting the customer
    - The language determines the language in print forms and emails
    - The editor is filled automatically with appropriate configuration (see topic *Employees*)
    - The VAT rate is determined automatically based on the country group of the country of the delivery address.
    - The actual tax rate is derived from the VAT rate and the quotation date *VAT [%]* automatisch ermittelt
    - A discount can be specified for the entire document and for individual items
    - On the topic of *Text blocks* and *Remarks (internal)* see topic *Print outputs*
- **Quotation**
    - For general properties see topic *Documents*
    - A sales order is automatically generated from an accepted quotation. Further sales orders can be generated via the object generator.
    - The job *Set old quotations to Expired* sets quotations in the status *Offen* to the status *Expired*, when the date *Valid until* was reached
    - The date *Valid until* on the state change to *Offen* from the current date and the Nuclet parameter *Validity period of purchase requisitions* i s calculated.
- **Sales order**
    - For general properties see topic *Documents*
    - It can be created from a quotation or created directly
    - Delivery notes and invoices can be created from a sales order via the object generator
    - As soon as a sales order reaches the status *Confirmed* the required material is reserved and is no longer available for other sales orders
- **Delivery note**
    - For general properties see topic *Documents*
    - It ensures the articles are booked out of the warehouse
- **Outgoing invoice**
    - For general properties see topic *Documents*
    - The job *Set old outgoing invoices to Overdue* sets outgoing invoices in the status *Offen* to the status *Overdue*, when the date *Due on* has been reached.
    - The date *Due on* on the state change to *Offen* is calculated from the current date and the payment term.

Purchasing

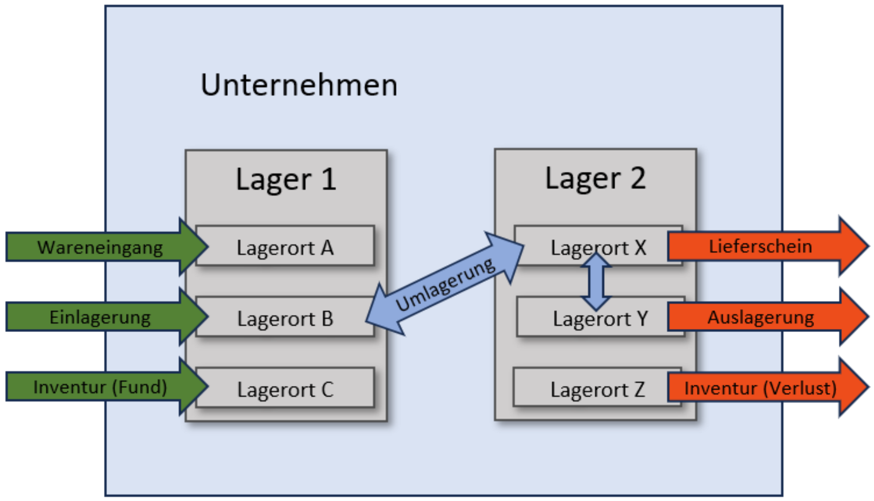
- **Purchase requisition**
    - For each stock level record, a minimum stock level and a reorder quantity can be defined
    - If (stock - reserved + ordered) < minimum stock, the job *Create purchase requisitions* automatically creates a purchase requisition with the specified reorder quantity for this article and the default supplier
    - The job *Set old purchase requisitions to Expired* sets purchase requisitions in the status *Entwurf* after x days (Nuclet parameter *Validity period of quotations*) to the status *Expired*
    - From a purchase requisition in the status *Freigegeben* a purchase order can be generated.
- **Purchase order**
    - For general properties see topic *Documents*

- It can be created manually or generated from a purchase requisition.
- For each purchase order item, goods receipts can be created until each item has been delivered.
- Goods receipts increase the stock level
- The job *Set old purchase orders to Overdue* sets purchase orders in the status *Ordered* to the status *Overdue*, when the date *Due on* was reached
- The date *Due on* on the state change to *Bestellt* from the current date and the Nuclet parameter *Due date of purchase orders* is calculated.

- **Incoming invoice**
  - For general properties see topic *Documents*
  - An incoming invoice primarily serves to record the data of an invoice received for a purchase order
  - It has no further influence on other BOs

warehouse management

- **Warehouse**
  - Defines various warehouses with their storage locations / storage bins
  - Shipping warehouse = warehouses from which shipping takes place. Only these stock levels influence delivery times (allows repair warehouse, complaint warehouse, etc.)
- **Stock level and stock movement**
  - Smallest possible storage unit
  - Stock movement = log of the changes to stock level, reservation or order
  - Stock movement type
    - These should not be renamed, as they are firmly wired into the warehouse logic
    - Selectable? = selectable in value list providers for stock-in, stock-out, stock transfer, depending on the configuration of Incoming? and Outgoing?
    - Reservation change? => changes only the reserved quantity, not the stock
    - Order change? => changes only the ordered quantity, not the stock
  - Changes to the stock level generally take place automatically through e.g. delivery notes (goods issue) and purchase orders (goods receipt)
  - However, there is also the option to influence the stock level independently of this. There are three processes for this:
    - Stock-in
    - Stock-out
    - Stock transfer



- **Stock inventory**
    - During a stock inventory, certain or all article groups can be inventoried in the specified warehouse
    - In the status *Execution* no more stock changes are possible for the affected stock levels
    - The stock levels in Nuclos can then be reconciled with the actual stock levels
    - On the state change to *Gebucht* all the determined differences are then posted into the warehouse
    - After that, stock changes are possible again; the stock inventory is completed
- **Checks**
    - Especially in the development phase of the Nuclet, it can be helpful to quickly find inconsistencies in warehouse management.
    - For this there are Nuclet parameters that check the health of the current stock level on every change.
    - Since this may come at the expense of performance, this check can be switched on and off via the Nuclet parameters as needed
    - See Nuclet parameters
        - *Stock check*
        - *Check stock level In stock*
        - *Check stock level Ordered*
        - *Check stock level Reserved*
        - *Validate stock levels*
    - In addition, there is a report *Fehlerreport Lagerbestand*, which lists all deviations between the current stock and the sum of the stock movements

General functions

- If authorised, many BOs offer **object generators** (selection Object generator in the detail view of the BOs). Here you can e.g. create a sales order from a customer or a quotation, or a purchase order from a purchase requisition or a supplier.
- If certain data of a value list is already used in other BOs (e.g. a delivery term in sales orders), then it can no longer be deleted. However, you can remove the flag "**Aktiv**" in the corresponding delivery term. This means the delivery term is no longer offered in the selection in sales orders in the future. This option exists for all value lists.
- Many BOs offer the option, in a tab **Document attachment** to store documents/files for this BO. Document attachments are not stored in the database but in the folder *<NUCLOS-HOME>/data/documents*. Therefore this folder should be part of the backup.
- If a BO has a **Reference** to another BO, e.g. a sales order has a reference to a customer, you can conversely look in the customer to see which sales orders exist for that customer. The sales orders are only displayed there and cannot be edited.

Administrator functions

Number ranges

- Number ranges determine how numbered BOs should be numbered
- See Nuclet: Number ranges

email sending

- See Nuclet: Email sending
- Email sending is possible via so-called email templates. These allow the administrator to configure the emails to be sent and to change them during operation.

- To send emails, an email server must be specified in the system parameters (see Parameter für Mailversand) and the templates activated if necessary.
- The job "Create sample data" creates some sample templates (initially inactive)
  - Order confirmation to customer - is sent to the customer's contact when the sales order goes into the status *Confirmed* wechselt
  - Invoice to customer - is sent to the customer's contact when the invoice goes into the status *Offen* wechselt
  - Purchase order to supplier - is sent to the supplier's contact when the purchase order goes into the status *Ordered* wechselt
- The email log contains all sent, yet-to-be-sent and received emails

Print outputs

- Important BOs (quotations, sales orders, ...) can be printed as PDF.
- Every generated form is automatically saved on the corresponding BO in the tab *Document attachments* .
- There are various ways to influence this printout without much effort.
- **Languages**
  - In order to import the Nuclet at all, multilingualism (see Datensprache) must be activated
  - Data relevant for print forms (e.g. article name, payment term) can then be translated into the specified data languages
  - In the table System > Language, all languages that should be available for customers, suppliers and contacts can be created
  - If no translation is found for a language, the translation of the default language is used (see Nuclet parameters)
  - Number formats (1.000,00 (DE) vs. 1,000.00 (US)) and date formats (01.12.2000 (DE) vs. 12/01/2000 (US)) can also be assigned to each language. If no formats are found, the formats stored in the Nuclet parameters apply
- **Form fields**
  - Here form fields are created and translated (e.g. allgemein.datum = (Datum, Date, ...))
  - This allows print forms to be changed at runtime and configured for additional languages
- **Variable components**
  - In **Form block** text blocks (incl. translation) can be created, e.g. for the terms and conditions. These blocks can, in the tab *Text blocks* be added manually to documents
  - In the respective **form configurations** hinterlegten *standard blocks* are automatically added to every form
  - The text stored in the field **Remarks (internal)** is printed in the form. This allows individual additions per quotation, sales order, ...

Nuclet parameters

Name	Function	Example
Stock check	On every change to the stock level, it is checked whether the current stock equals the sum of the stock movements. This can be helpful to find errors in warehouse management early, but over time can also lead to poor performance.	true / false
Default Format Datum	Date format used in forms when it cannot be determined from the data	dd.MM.yyyy
Default Format Zahl	Locale used for the number format in forms when it cannot be determined from the data	DE
Defaultsprache	Language used in forms when it cannot be determined from the data	de_DE
Eigene USt-IdNr.	Your own VAT ID no.	123456890
Due date of purchase orders	Number of days after which purchase orders receive the status "Overdue" (job "Set old purchase orders to Overdue")	14
Validity period of quotations	Number of days after which quotations receive the status "Expired" (job "Set old quotations to Expired")	42
Validity period of purchase requisitions	Number of days after which purchase requisitions receive the status "Expired" (job "Set old purchase requisitions to Expired")	13
Check stock level In stock	On every change to the stock level, it is checked whether the current stock equals the sum of the stock movements. This can be helpful to find errors in warehouse management early, but over time can also lead to poor performance.	true / false
Check stock level Ordered	On every change to the stock level, it is checked whether the ordered quantity equals the sum of the stock movements. In addition, it is checked whether the ordered quantity is consistent with the current stock of purchase orders. This can be helpful to find errors in warehouse management early, but over time can also lead to poor performance.	true / false
Check stock level Reserved	On every change to the stock level, it is checked whether the reserved quantity equals the sum of the stock movements. In addition, it is checked whether the reserved quantity is consistent with the current stock of sales orders. This can be helpful to find errors in warehouse management early, but over time can also lead to poor performance.	true / false
Over-reservation	Allows reserving larger quantities than are actually available in the warehouse.	true / false

Validate stock levels	On every change to the stock level, it is checked whether the current stock record is valid (quantities < 0, batch and serial number present if necessary, ...) This can be helpful to find errors in warehouse management early.	true / false

Jobs

Name	Function	Cycle
Empfange Emails	Reads emails from the email account specified under Administration > Parameters and saves them in the email log.	Regularly
Create sample data	Creates sample data (articles, customers, warehouses, …) for a quick start into development and testing.	Once
Create purchase requisitions	Creates purchase requisitions when minimum stock levels are undercut	Regularly
Initialisiere Nuclet Emailversand	Creates the data necessary for email sending	Once
Initialisiere Nuclet Handel	Creates the data technically necessary for the trade Nuclet (e.g. stock movement types, form fields, tax rates …). This job can be extended to make automatic adjustments after each further Nuclet update.	Once
Set old quotations to Expired	Automatically sets expired quotations to the status "Expired" (Nuclet parameter "Validity period of quotations")	Regularly
Set old outgoing invoices to Overdue	Automatically sets overdue invoices to the status "Overdue" ("Number of days" in the payment term)	Regularly
Set old purchase orders to Overdue	Automatically sets overdue purchase orders to the status "Overdue" (Nuclet parameter "Due date of purchase orders")	Regularly
Set old purchase requisitions to Expired	Automatically sets expired purchase requisitions to the status "Expired" (Nuclet parameter "Validity period of purchase requisitions")	Regularly
Validate email templates	Validates all email templates	As needed
Versende Emails	Sends all emails in the email log that are earmarked for sending (Nuclet parameter "Email sofort versenden" = "N")	Regularly
Versende Erinnerungen	Sends recurring reminder emails	Regularly

Related pages

Modules

All modules

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