





## “User Manual- **Android**”

(Version 1.0.0)

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# Table of Content

---

1. [New User Registration](#)
2. [Account Activation](#)
3. [GOIS Subscription](#)
4. [Setup the System](#)
5. [Login on Device](#)
6. [Forgot Password](#)
7. [Setup "User Settings"](#)
8. [Dashboard](#)
9. [Manage](#)
  - [Category](#)
    - Add Category
    - Update Category
    - Delete Category Search\Filter
  - [Vendor](#)
    - Add Vendor Contact
    - Update Vendor
    - Delete Vendor
    - Search\Filter\Sorting
  - [Customer](#)
    - Add Customer
    - Update Customer
    - Deleting Customer
    - Search\Sorting
10. [Product](#)
  - Add Product
  - Update Product
  - Delete Product
  - Search\Filter\Sorting

### **11. Purchase Order**

- Add Order
- Update Order
- Fulfill Purchase Order
- Fulfill All
- Partial Fulfill
- Delete Order
- Search\Filter\Sorting

### **12. Inventory**

- [Available Stock](#)
- [Available Stock Entries](#)
- [Add Stock](#)
- [Receive delivery](#)
- [Transfer Stock](#)
- Add\Update\Delete Inventory
- Search\Filter\Sorting

### **13. Sales Order**

- Add Sales Order
- Update Sales Order
- Dispatch Sales Order
- Delete Sales Order
- Searching\Filter\Sorting

### **14. Reports**

- [All Transaction Report](#)
- [Profit & Loss Report](#)
- [Low Stock Report](#)
- [Inventory Report](#)
- [Closed Purchase Order Report](#)
- [Closed Sales Order Report](#)

### **15. Settings:**

- Download Settings
- Organization
- Business Unit
- Unit
- Currency
- Time Zone
- Working Mode
- Tracking

#### **16. Sync**

- Products Sync
- Orders Sync
- Inventory Sync
- Sales Sync
- Miscellaneous Sync

#### **17. Utility**

#### **18. User Profile**

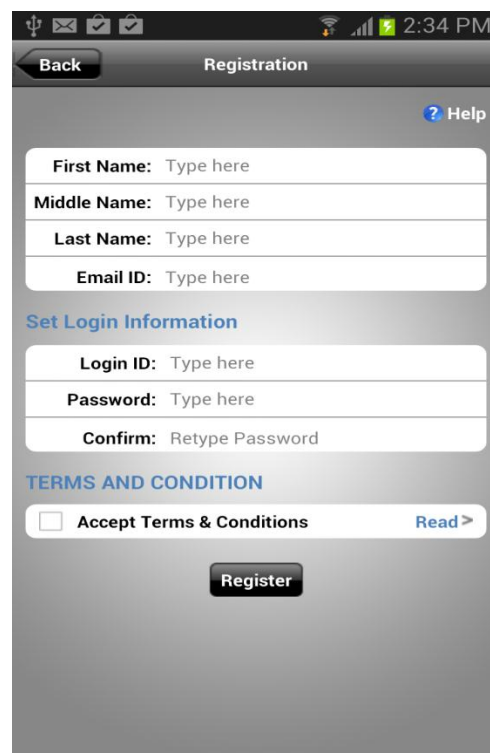
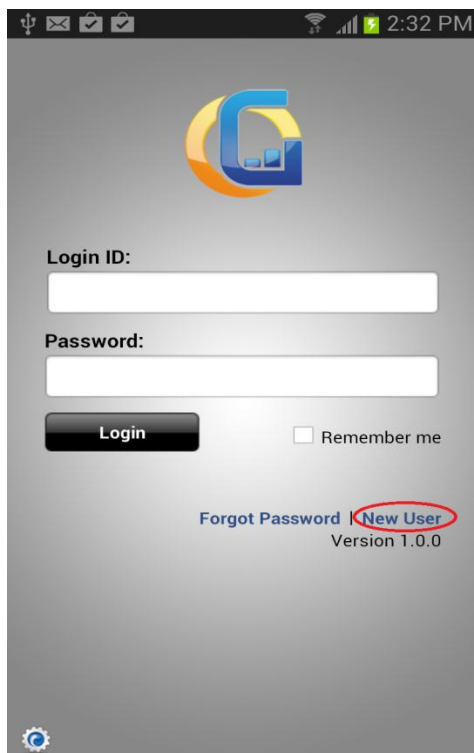
#### **19. Working with different user on same device**

## NEW USER REGISTRATION

***User can register himself as a “Business Owner”. A business Owner can then create different other users from web only.***

**Registration on Device:** Follow the following steps to register yourself:

1. Select the GOIS Pro app icon on your device
2. Click on “New User” link
3. Fill the registration form
4. Click on “Register” button
5. You are now registered as a “Business Owner”
6. An activation link has been sent to your registered email ID



[Go to Top](#)

## ACCOUNT ACTIVATION

Follow the following steps to activate your account:

1. Open your email ID which you have provided for registration
2. Check email sent from 'support@goodsorderinventory'
3. To activate your account follow the steps written in the email
4. Your account will now activated

GOIS Pro - Credentials and Email Verification

support@goodsorderinventory.com 6:10 PM (21 minutes ago)

to me

Dear Robert Demo,

Thank you for choosing Goods Order Inventory for your business needs.

Your credential to access GOIS-Pro is

Login ID: demo2  
Password: q

Your verification code is: G3GUHB

Click on following link to verify your email with us.  
[Click here to verify your email.](#)

If above link does not work you may copy and paste the below link in your web browser to verify your email with us.

**Activation Link:**  
<http://www.sandbox.goisllc.com/Accounts/UserActivation.aspx?eqs=EF8FAFB515C08C881D9513721E39585B1B6A97DE1FD821393040B2042284A6005260BF581E4DAF495DC15A9170FDBD2437E849B20D236264>

Following steps are involved as part of setup process once your email is verified:

- Step 1. Subscription (Optional, default free package will be enabled on Account Setup)  
Select [subscription package](#), Login, Make Payment (if applicable)
- Step 2. GOIS Pro Account Setup (Mandatory, must be completed on web before login to Mobile Apps)  
[Login](#), Setup Account (Define Organization, Business Unit and Location, Timezone, Unit, Currency, Decimals and Web Application Theme; Define time format for Web and Mobile; Purchase Order and Sales Order Settings; Default Product and Category Settings)

For more detail on activation process, please visit manuals at [www.goodsorderinventory.com/Download](http://www.goodsorderinventory.com/Download)

[Go to Top](#)

## GOIS SUBSCRIPTION

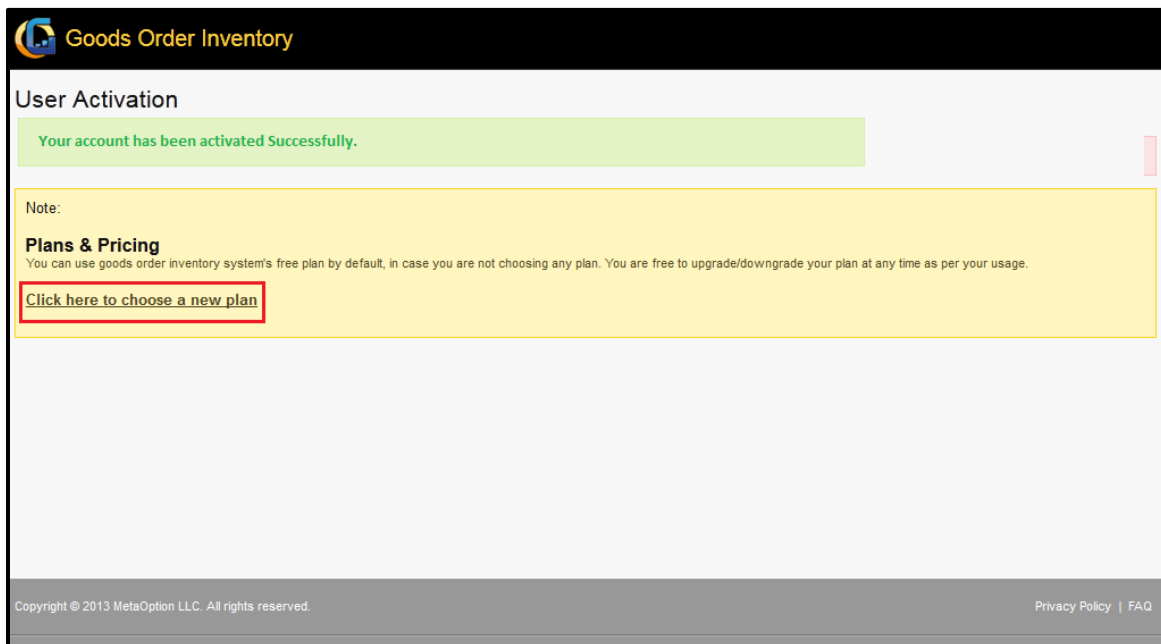
### a) Free Subscription:

After registration you will be associated with the “**GOIS Pro- Free Plan**” by default. You can start using free subscription or you can subscribe any other plan as per your need at any time.

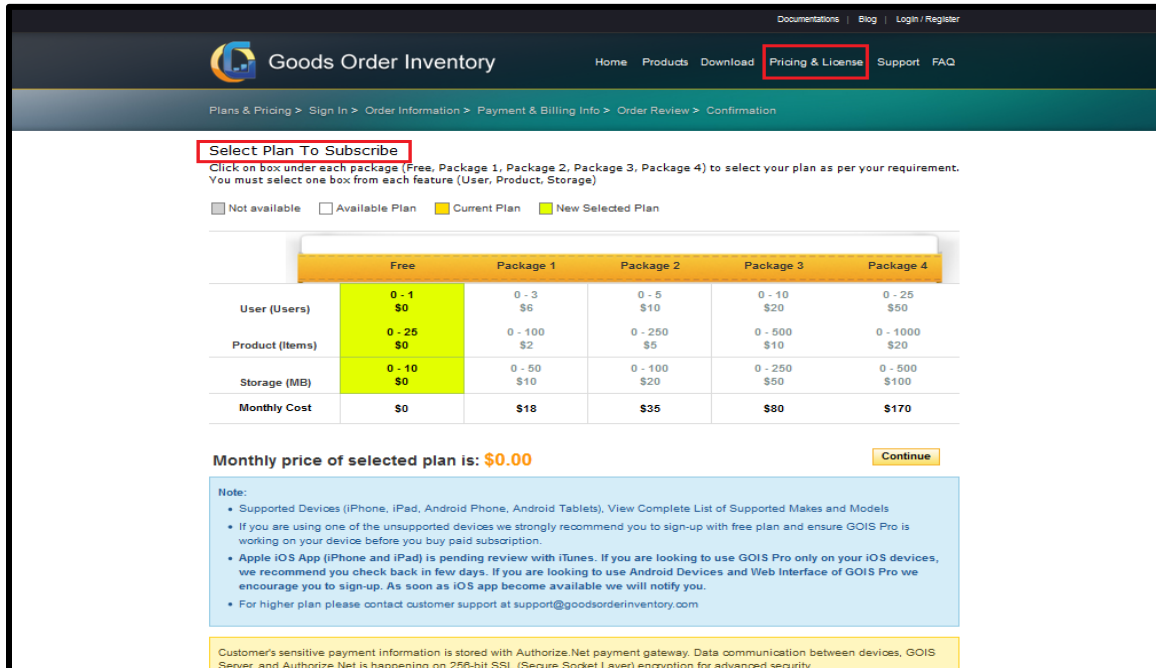
### b) Paid Subscription:

As per the requirement of your Business or Organization you are allowed to upgrade your free plan to a paid one by clicking on the link says “click here to choose a new plan” as highlighted in the below screenshot.

1. If you will click on the link “**click here to choose a new plan**” as highlighted above, you will be redirected to our GOIS-Pro website, from where you can select your desired plan by using Pricing & License section.



- You can select any of the package or create a customize package. After clicking on “Continue”, you will be redirected to “Login” screen



**Select Plan To Subscribe**

Click on box under each package (Free, Package 1, Package 2, Package 3, Package 4) to select your plan as per your requirement. You must select one box from each feature (User, Product, Storage)

☐ Not available ☐ Available Plan ☒ Current Plan ☐ New Selected Plan

	Free	Package 1	Package 2	Package 3	Package 4
User (Users)	0 - 1 \$0	0 - 3 \$6	0 - 5 \$10	0 - 10 \$20	0 - 25 \$50
Product (Items)	0 - 25 \$0	0 - 100 \$2	0 - 250 \$5	0 - 500 \$10	0 - 1000 \$20
Storage (MB)	0 - 10 \$0	0 - 50 \$10	0 - 100 \$20	0 - 250 \$50	0 - 500 \$100
Monthly Cost	\$0	\$18	\$35	\$80	\$170

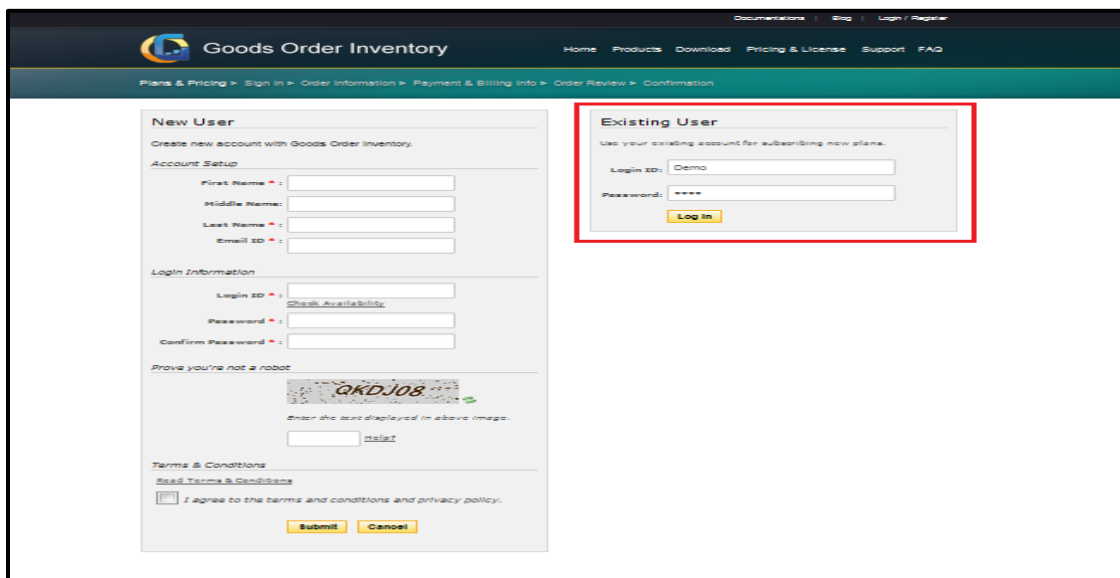
Monthly price of selected plan is: **\$0.00** [Continue](#)

**Note:**

- Supported Devices (iPhone, iPad, Android Phone, Android Tablets), View Complete List of Supported Makes and Models
- If you are using one of the unsupported devices we strongly recommend you to sign-up with free plan and ensure GOIS Pro is working on your device before you buy paid subscription.
- Apple iOS App (iPhone and iPad) is pending review with iTunes. If you are looking to use GOIS Pro only on your iOS devices, we recommend you check back in few days. If you are looking to use Android Devices and Web Interface of GOIS Pro we encourage you to sign-up. As soon as iOS app become available we will notify you.
- For higher plan please contact customer support at support@goodsorderinventory.com

Customer's sensitive payment information is stored with Authorize.Net payment gateway. Data communication between devices, GOIS Server, and Authorize.Net is happening on 256-bit SSL (Secure Socket Layer) encryption for advanced security.

- As you have already registered yourself, Select **Existing user** Section and provide your Login credentials (Login/password) and then click on Login Button.



**New User**

Create new account with Goods Order Inventory.

**Account Setup**

First Name:

Middle Name:

Last Name:

Email ID:


**Login Information**

Login ID:  [Check Availability](#)

Password:

Confirm Password:

**Prove you're not a robot**



Enter the text displayed in above image:  [Help?](#)

**Terms & Conditions**

[Read Terms & Conditions](#)

☐ I agree to the terms and conditions and privacy policy.

[Submit](#) [Cancel](#)

**Existing User**

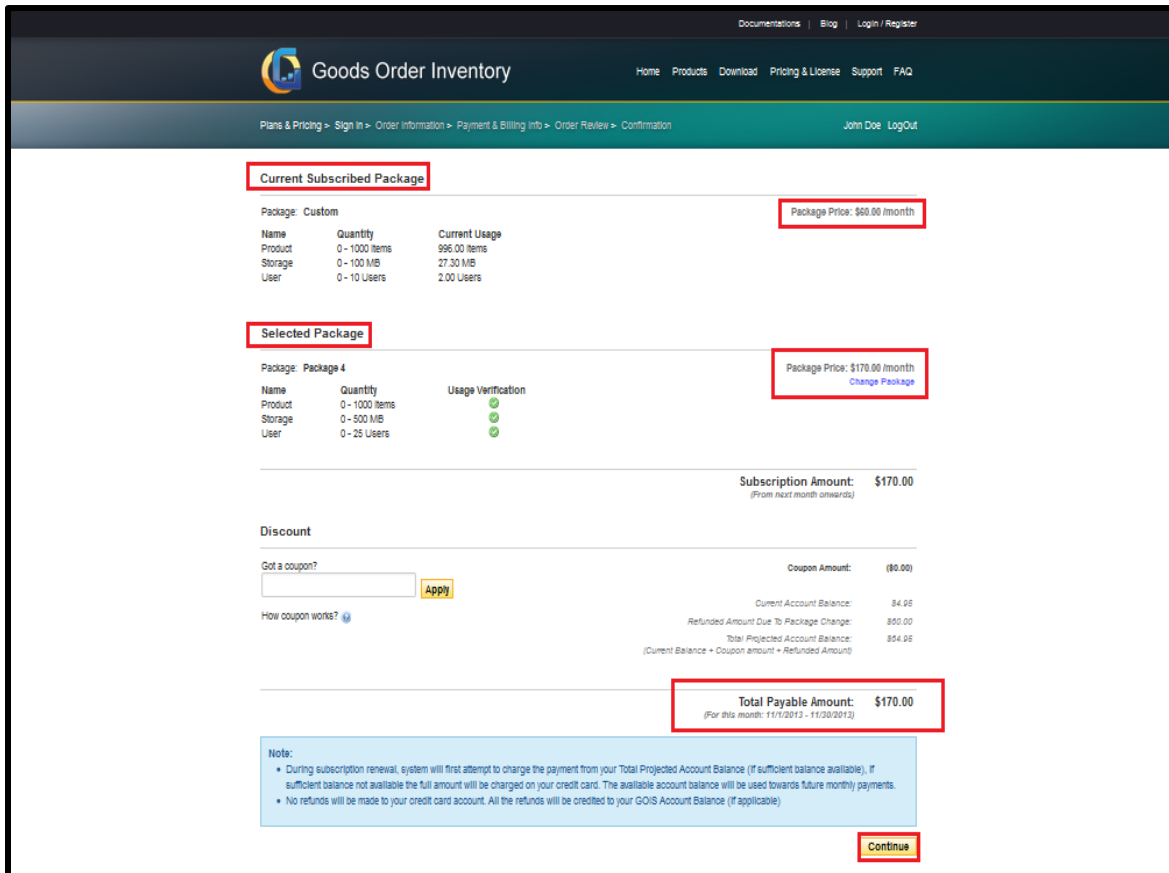
Use your existing account for subscribing new plans.

Login ID:  Demo

Password:  \*\*\*\*

[Log In](#)

4. Press Continue button.



Documentation | Blog | Login / Register

**Goods Order Inventory** Home Products Download Pricing & License Support FAQ

Plans & Pricing > Sign In > Order Information > Payment & Billing Info > Order Review > Confirmation John Doe Logout

**Current Subscribed Package**

Package: Custom

Name	Quantity	Current Usage
Product	0 - 1000 Items	996.00 Items
Storage	0 - 100 MB	27.30 MB
User	0 - 10 Users	2.00 Users

Package Price: \$96.00 /month

**Selected Package**

Package: Package 4

Name	Quantity	Usage Verification
Product	0 - 1000 Items	✓
Storage	0 - 500 MB	✓
User	0 - 25 Users	✓

Package Price: \$170.00 /month  
[Change Package](#)

**Subscription Amount: \$170.00**  
(From next month onwards)

**Discount**

Got a coupon?  [Apply](#)

How coupon works? ⓘ

Coupon Amount: (\$0.00)

Current Account Balance: \$4.96

Refunded Amount Due To Package Change: \$50.00

Total Projected Account Balance: \$54.96  
(Current Balance + Coupon amount + Refunded Amount)

**Total Payable Amount: \$170.00**  
(For this month: 11/1/2013 - 11/30/2013)

**Note:**


- During subscription renewal, system will first attempt to charge the payment from your Total Projected Account Balance (if sufficient balance available). If sufficient balance not available the full amount will be charged on your credit card. The available account balance will be used towards future monthly payments.
- No refunds will be made to your credit card account. All the refunds will be credited to your GOIS Account Balance (if applicable)

[Continue](#)

5. Choose your preferred **Payment option**.


- Pay via "Account Balance": Select this option to make payment from your GOIS account balance
- Pay via "Credit Card": Select this option to make payment from your credit card
  - Add a new card by clicking on "Add new Payment Account" link and provide all mandatory details (or)
  - Select any previously added credit card for payment


[Documentations](#) | [Blog](#) | [Login / Register](#)

 **Goods Order Inventory** [Home](#) [Products](#) [Download](#) [Pricing & License](#) [Support](#) [FAQ](#)



Plans & Pricing > [Sign In](#) > [Order Information](#) > [Payment & Billing Info](#) > [Order Review](#) > [Confirmation](#) Robin A Q Cullen A [LogOut](#)

Select Your Payment Method

**Pay via Account Balance**  
Customer payment account associated with GOIS.

**Pay via Credit Card**  
We accept Mastercard, Visa, Discover, JCB, Diners Club and American Express.

[Add New Payment Account](#)

Card Type	Card No.	Expiry Date	Name On Card	Is Default	Billing Address
 American Express (Credit Card)	xxxx-xxxx-xxxx-0002	12/2013	Robin		A-78, NW, Brandon, R7A-R7

[Continue](#)

Customer's sensitive payment information is stored with Authorize.Net payment gateway. Data communication between devices, GOIS Server, and Authorize.Net is happening on 256-bit SSL (Secure Socket Layer) encryption for advanced security.

- Again click on continue button, now you will be redirected to the **Payment Details** section for final confirmation of payment.
- Press **Confirm and Place order**.
- Now you will see an Order Confirmation screen shows the status message and reference/transaction number for your payment.
- You will also receive an order confirmation mail in your E-mail ID as well which you can keep for your future reference.
- If your transaction is successful, it means you are now associated with a new selected plan.

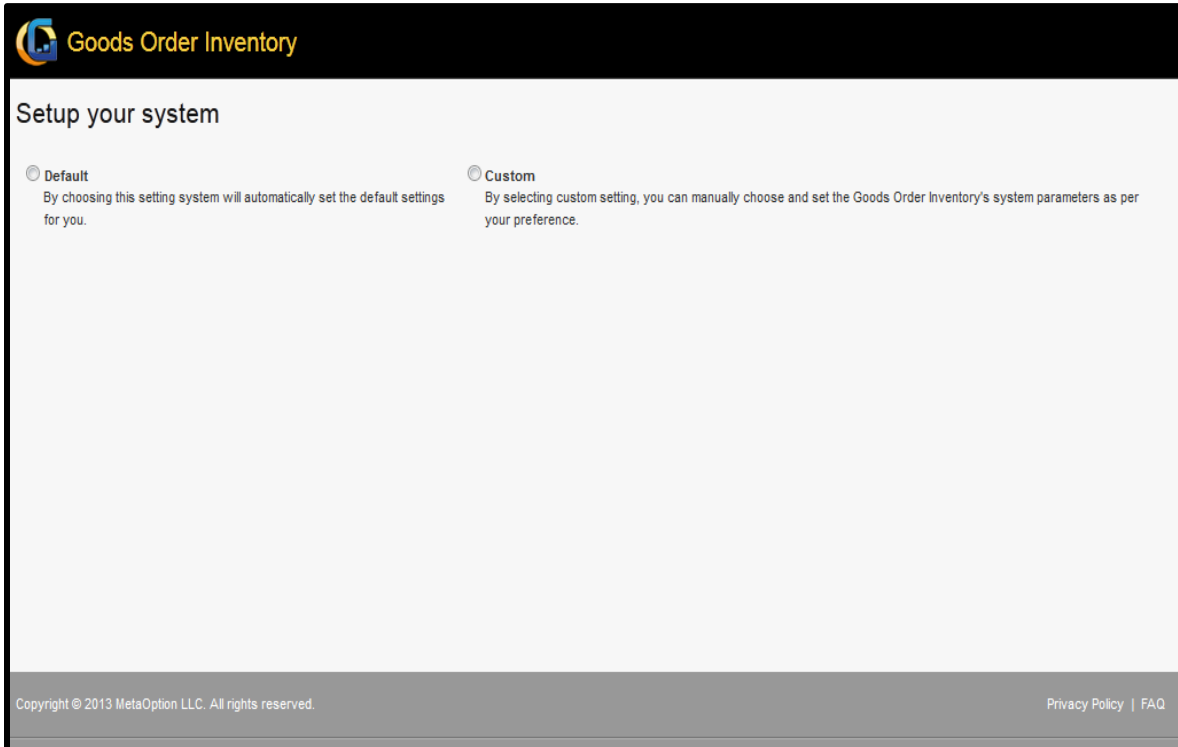
(\*Note: You have setup your account on web, now you can use GOIS Pro app on your device)

[Go to Top](#)

## Setup the System

If you are using the application for the first time you have to “Setup the system” from web, only then you are able to login on device or web.

“**Setup Your System**” screen contains two options as **Default and Custom**. Here you need to choose an option to setup your GOIS account.



**Goods Order Inventory**

### Setup your system

☒ **Default**  
By choosing this setting system will automatically set the default settings for you.

☐ **Custom**  
By selecting custom setting, you can manually choose and set the Goods Order Inventory's system parameters as per your preference.

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### a) Default Setup:

On selecting the “Default” radio button, system will provide you a standard set of default settings which would be associated with your Business Owner Account. In this case you don’t need to fill the information to setup your initial account. However as per your requirement you can change the settings of your GOIS-account.

In this process user just need to click on next every time and at last need to click on Save & Finish and you will be redirected to the Home dashboard screen of your GOIS-Account.

## b) Custom Setup:

If you will choose the custom setup as an account setup option, you need to provide all the details for your organization which will be used into the GOIS-Pro system.

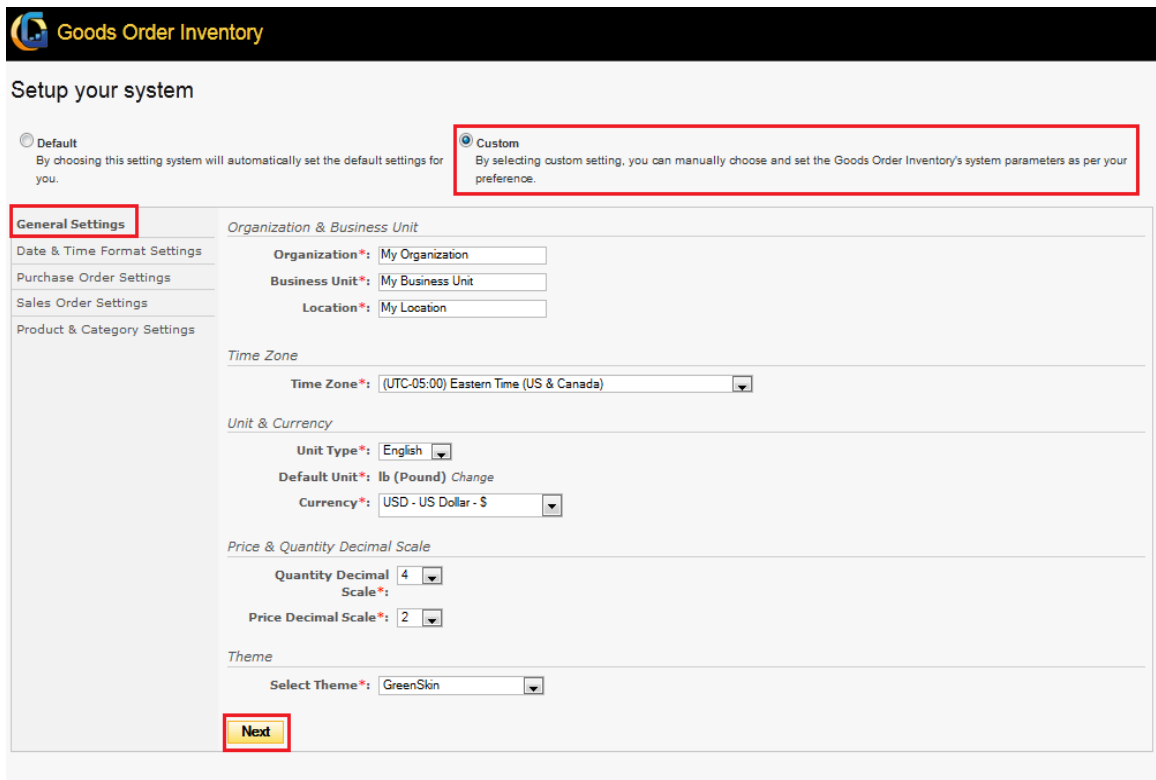
On the first screen, you need to provide the details for the **General settings** having some fields.

### General Settings:

**Organization:** This field defines the name for your Default Organization within your GOIS account.

**Business Unit:** This field defines the name for your Default business Unit within the default Organization.

**Location:** This field defines the name for your Default Location within the default Organization and Business Unit.



**Goods Order Inventory**

Setup your system

☐ Default  
By choosing this setting system will automatically set the default settings for you.

☒ Custom  
By selecting custom setting, you can manually choose and set the Goods Order Inventory's system parameters as per your preference.

**General Settings**

Date & Time Format Settings

Purchase Order Settings

Sales Order Settings

Product & Category Settings

**Organization & Business Unit**

Organization\*: My Organization

Business Unit\*: My Business Unit

Location\*: My Location

**Time Zone**

Time Zone\*: (UTC-05:00) Eastern Time (US & Canada)

**Unit & Currency**

Unit Type\*: English

Default Unit\*: lb (Pound) Change

Currency\*: USD - US Dollar - \$

**Price & Quantity Decimal Scale**

Quantity Decimal Scale\*: 4

Price Decimal Scale\*: 2

**Theme**

Select Theme\*: GreenSkin

**Next**

(\*Note: For your instance a default data will be populated as shown on the below screen which is editable as per your Organization's requirement.)

**Time Zone:** This field defines the Default time zone which will be associated with the Business Owner Account.

**Unit Type:** This field defines the type of Measurement Unit (English or Metric) which will be used within the organization.

**Default Unit:** This field defines the default Measurement Unit on the basis of your selected preference (English or Metric); which will be assigned to all the products within the organization.

**Currency:** This field defines the default currency which will be used within the organization.

**Quantity Decimal Scale:** This field defines the decimal scale for the quantity associated with the products/items. For Example: 4.50 liters; here the decimal scale is 2.

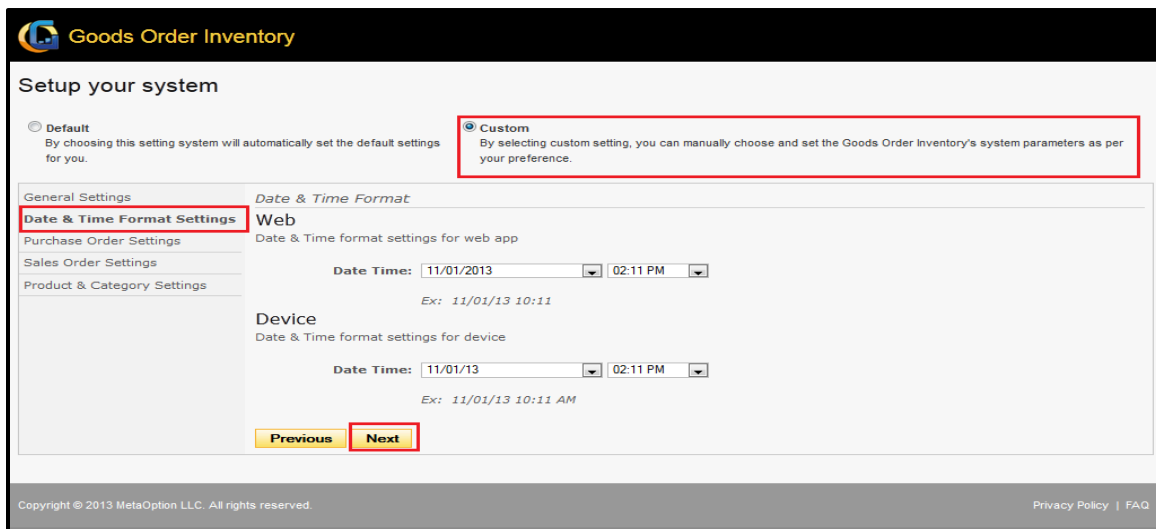
**Price Decimal Scale:** This field defines the decimal scale for the prices which will be given to the products/items. For Example: 7.502 \$; here the decimal scale is 3.

**Select Theme:** Using this field, you can choose your desired default color theme for your GOIS Account.

### **Date and Time format settings:**

**Web Date Time:** In this field you need to choose the default date and time which will be followed in your GOIS web account.

**Device Date Time:** In this field you need to choose the default date and time which will be followed in all the devices associated with your GOIS account.



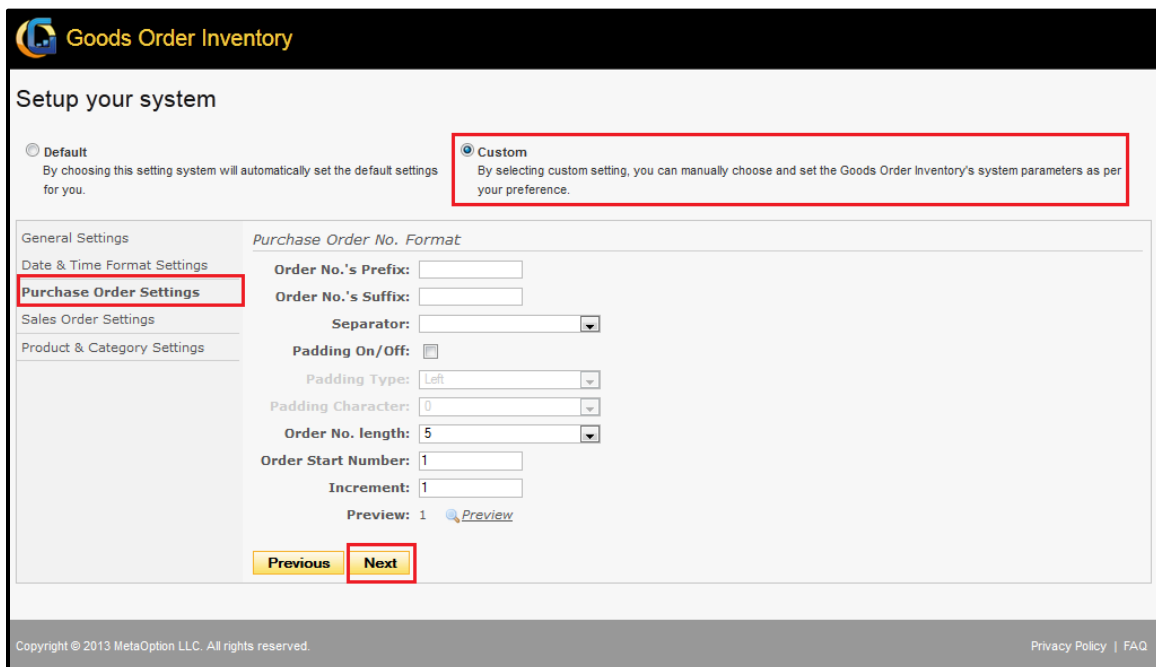
The screenshot displays the 'Setup your system' interface for 'Goods Order Inventory'. At the top, there are two radio buttons: 'Default' (unselected) and 'Custom' (selected). The 'Custom' option is highlighted with a red box. Below this, a sidebar on the left lists various settings categories, with 'Date & Time Format Settings' highlighted by a red box. The main content area is titled 'Date & Time Format' and is divided into 'Web' and 'Device' sections. Each section contains a 'Date Time' field with a date and time picker, and an example format. The 'Web' section shows '11/01/2013 02:11 PM' and 'Ex: 11/01/13 10:11'. The 'Device' section shows '11/01/13 02:11 PM' and 'Ex: 11/01/13 10:11 AM'. At the bottom of the main content area, there are 'Previous' and 'Next' buttons, with the 'Next' button highlighted by a red box. The footer of the page includes copyright information for MetaOption LLC and links to Privacy Policy and FAQ.

## **Purchase Order Settings:**

**Order No.'s Prefix:** User is allowed to prepend some characters or letters or digits before the purchase Order number to make a standard business series for all the Purchase Orders.

**Order No.'s Suffix:** You can also append some characters or letters or digits after the Purchase Order number.

**Separator:** User can choose any character as a separator from drop down list between Prefix, Purchase Order Number and Suffix.



**Goods Order Inventory**

Setup your system

☐ Default  
By choosing this setting system will automatically set the default settings for you.

☒ Custom  
By selecting custom setting, you can manually choose and set the Goods Order Inventory's system parameters as per your preference.

General Settings  
Date & Time Format Settings  
**Purchase Order Settings**  
Sales Order Settings  
Product & Category Settings

*Purchase Order No. Format*

Order No.'s Prefix:

Order No.'s Suffix:

Separator:

Padding On/Off: ☐

Padding Type:

Padding Character:

Order No. length:

Order Start Number:

Increment:

Preview: 1 [Preview](#)

[Previous](#) [Next](#)

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**Padding On/Off:** This field will include or exclude the padding character in your order number; to span the full length of order string.

**Padding Type:** You can add padding character either on left or on right on the Purchase Order number to span the full order length.

**Padding Character:** You can select a padding character from drop down list; which will be appended with Purchase Order number if padding is ON.

**Order No. length:** User can set a standard length for all the Purchase Orders. An order can have a maximum length of 20 characters (excluding prefixes and Suffixes).

**Order Start Number:** You can define the start number for your order number series.

**Increment:** You can set the incremental series for your Purchase Order Number.

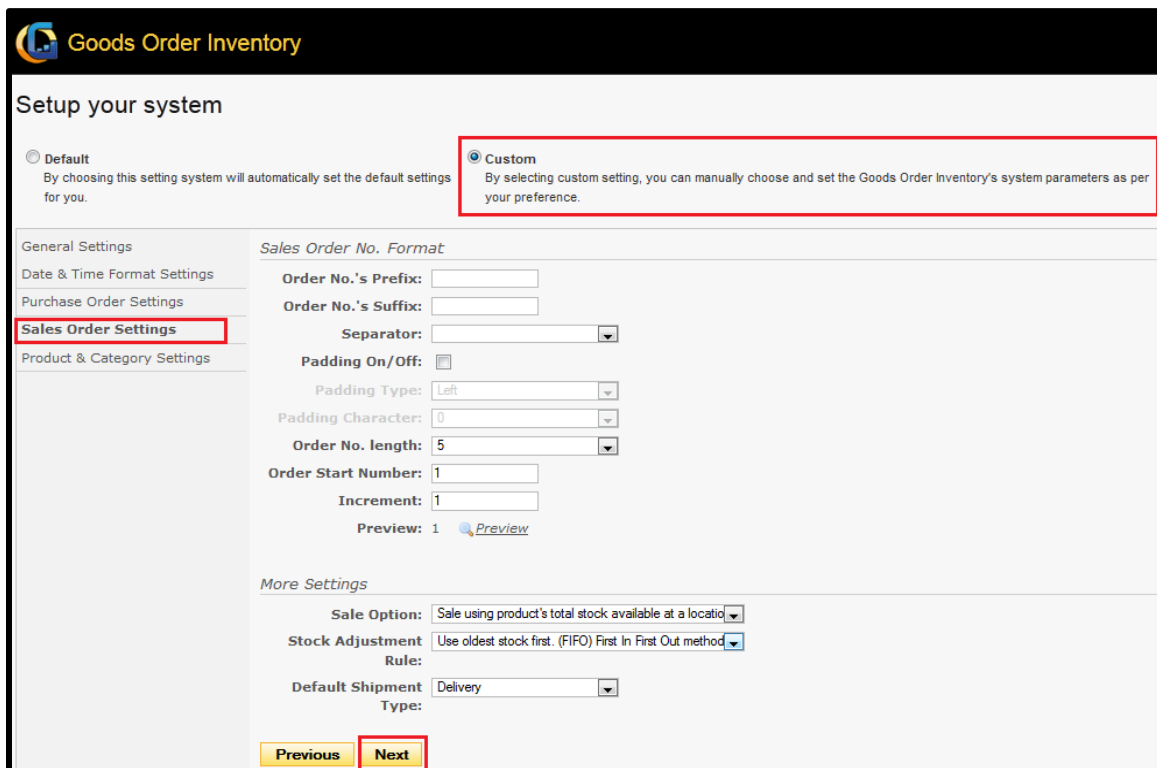
**Preview:** You can check the format of defined Purchase Order string by clicking on this button.

### **Sales Order Settings:**

**Order No.'s Prefix:** User is allowed to prepend some characters or letters or digits before the Sales Order number to make a standard business series for all the Sales Orders.

**Order No.'s Suffix:** You can also append some characters or letters or digits after the Sales Order number.

**Separator:** User can choose any character as a separator from drop down list between Prefix, Sales Order Number and Suffix.



**Goods Order Inventory**

Setup your system

☐ Default  
By choosing this setting system will automatically set the default settings for you.

☒ Custom  
By selecting custom setting, you can manually choose and set the Goods Order Inventory's system parameters as per your preference.

**General Settings**

Date & Time Format Settings

Purchase Order Settings

**Sales Order Settings**

Product & Category Settings

**Sales Order No. Format**

Order No.'s Prefix:

Order No.'s Suffix:

Separator:

Padding On/Off: ☐

Padding Type:

Padding Character:

Order No. length:

Order Start Number:

Increment:

Preview: 1 [Preview](#)

**More Settings**

Sale Option:

Stock Adjustment Rule:

Default Shipment Type:

[Previous](#) [Next](#)

**Padding On/Off:** This field will include or exclude the padding character in your order number; to span the full length of order string.

**Padding Type:** You can add padding character either on left or on right on the Sales Order number to span the full order length.

**Padding Character:** You can select a padding character from drop down list; which will be appended with Sales Order number if padding is ON.

**Order No. length:** User can set a standard length for all the Sales Orders. An order can have a maximum length of 20 characters (excluding prefixes and Suffixes).

**Order Start Number:** You can define the start number for your order number series.

**Increment:** You can set the incremental series for your Sales Order Number.

**Preview:** You can check the format of defined Sales Order string by clicking on this button.

**Sale Option:** Owner has three options which can be applied on the sale.

Sale using product's total stock available at a location. Stock adjustment rule will be applied.  
Sale using product's individual stock entries available at a location.  
Sale using the Product List without using the Inventory.

**Option1. Sale using product's total stock available at a location.** Stock adjustment rule will be applied: It means all the sale will be made from the total available stock (may contain multiple entries) at a selected location against a specific product. Using this option the chosen stock adjustment rule (either FIFO or LIFO) will be applied to the stock.

**Option2. Sale using product's individual stock entries available at a location:** It means each sale will be made from individual stock entry against a product available at a given location. At the time of sale, you need to choose the specific entry with which you want to make a sale.

**Option3. Sale using the product list without using the inventory:** It means you can make sale directly from the product list without using the inventory or stock available.

**Stock Adjustment Rule:** This rule will be applicable for sales orders created from stock.

Use oldest stock first. (FIFO) First In First Out method.  
Use newest stock first. (LIFO) Last In First Out method.

**FIFO: First In First Out** i.e. the first entry for a product into the inventory will be going out or used first at the time of sale.

**LIFO: Last In First Out** i.e. the Last entry for a product into the inventory will be going out or used first at the time of sale.

**Default Shipment Type:** User can set the shipment type of the sale orders.

A dropdown menu with two options: 'Delivery' (highlighted in blue) and 'Pickup'.

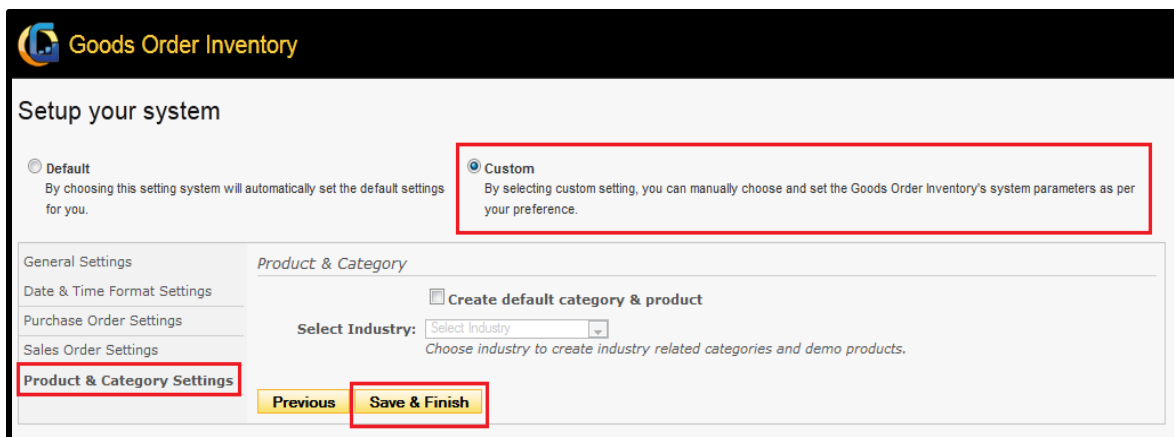
**Option1- “Delivery”:** This specifies the default shipment type as it will be delivered at your shipping address.

**Option2- “Pickup”:** This specifies the default shipment type as pickup.

### **Product & Category Settings:**

**Create Default Category:** If user wants to create a default sample category list and products in their account, then you need to check mark this box.

**Select Industry:** User can choose the industry type from drop down list for which the sample categories and products will be created.

A screenshot of the 'Goods Order Inventory' setup interface. The title bar says 'Goods Order Inventory'. Below it, the section 'Setup your system' has two radio buttons: 'Default' (unselected) and 'Custom' (selected and highlighted with a red box). The 'Custom' option has a description: 'By selecting custom setting, you can manually choose and set the Goods Order Inventory's system parameters as per your preference.' Below this, there's a sidebar with 'General Settings' (expanded) and 'Product & Category' (highlighted with a red box). Under 'General Settings', there are links for 'Date & Time Format Settings', 'Purchase Order Settings', 'Sales Order Settings', and 'Product & Category Settings' (highlighted with a red box). The 'Product & Category' section has a checkbox 'Create default category & product' and a 'Select Industry:' dropdown menu. Below the dropdown is a note: 'Choose industry to create industry related categories and demo products.' At the bottom, there are two buttons: 'Previous' and 'Save & Finish' (highlighted with a red box).

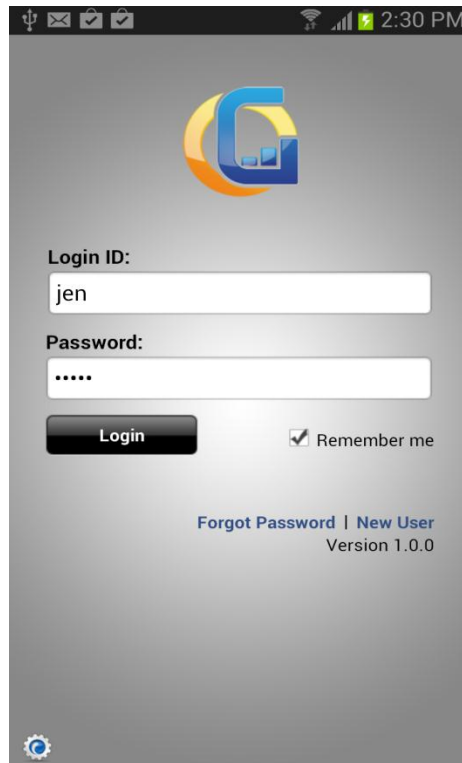
**Save and Finish:** At the end, user must have to click on this button to fix the settings with their account. On clicking to this button your account will be ready to use and you will be redirected to the Home dashboard screen of your GOIS Pro account as shown in below screen.

[Go to Top](#)

## Login on device

Follow the steps to login on your GOIS Pro account:

1. Click on the “Goods Order” app icon on your device
2. Enter your valid credentials
3. Click on “Login” button

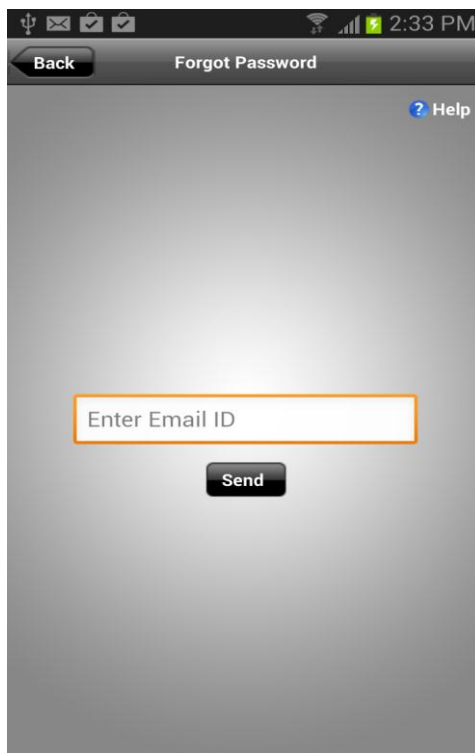
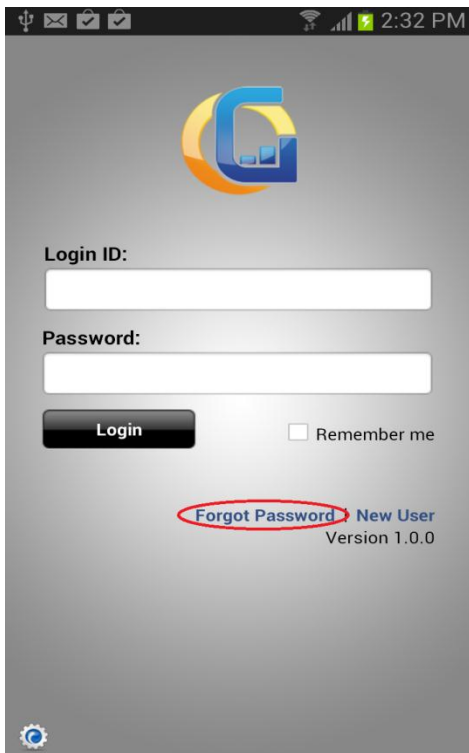


[Go to Top](#)

## Password Recovery

You can recover your password by click on forgot password link on the login screen.

1. Click on the “Forgot Password” link present on the login screen
2. Enter your email ID, which is registered with the application
3. Click on “Submit” button
4. You will get the password in your email ID



[Go to Top](#)

## Setup “User Settings” *(when login for the first time)*

You have to select the organization, business unit and a default location on which you want to work. You can only work on a single Business Unit at a time.

**Download Settings:** Click on this button if some of your settings not downloaded

### **Organization:**

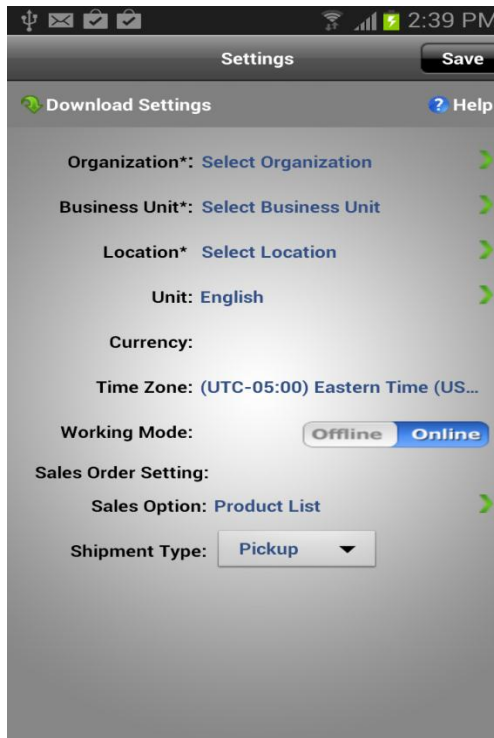
This section allows you to change set current organization

1. Click on “Organization”
2. Displayed all the associated organization of your account
3. Select the organization you want to work on

### **Business Unit:**

This section allows you to set your current business unit

1. Click on “Business Unit”
2. Displayed all the business units associated with the selected organization
3. Select the business unit you want to work on



The screenshot shows a mobile application interface for 'Settings'. At the top, there's a status bar with icons for USB, email, and battery, and the time '2:39 PM'. Below the status bar is a header with 'Settings' and a 'Save' button. The main content area has a 'Download Settings' button with a green arrow icon and a 'Help' button with a question mark icon. The settings are organized into sections: 'Organization\*' with a 'Select Organization' button and a green arrow; 'Business Unit\*' with a 'Select Business Unit' button and a green arrow; 'Location\*' with a 'Select Location' button and a green arrow; 'Unit: English' with a green arrow; 'Currency:'; 'Time Zone: (UTC-05:00) Eastern Time (US...'; 'Working Mode:' with 'Offline' and 'Online' buttons; 'Sales Order Setting:'; 'Sales Option: Product List' with a green arrow; and 'Shipment Type: Pickup' with a dropdown arrow.

***Location:***

List of all the location associated with the selected Business Unit displayed here. This section allows you to select any location as default location.

***Unit:***

Display Unit type which you selected on web for this user. You can change the default unit type.

1. Click on "Unit"
2. Displayed "Unit" screen
3. To change default unit, click on selected default unit
4. You will now redirected on "Unit List"
5. Select the default unit

***Currency:***

- Currency will be displayed as per selected business unit
- You can change the currency only from your "GOIS Pro web" account

***Time Zone:***

- Time Zone will be displayed as per the current user, which has been set on web.
- You can change the time-zone only from your "GOIS Pro web" account

***Working Mode:***

You can choose from two different working modes:

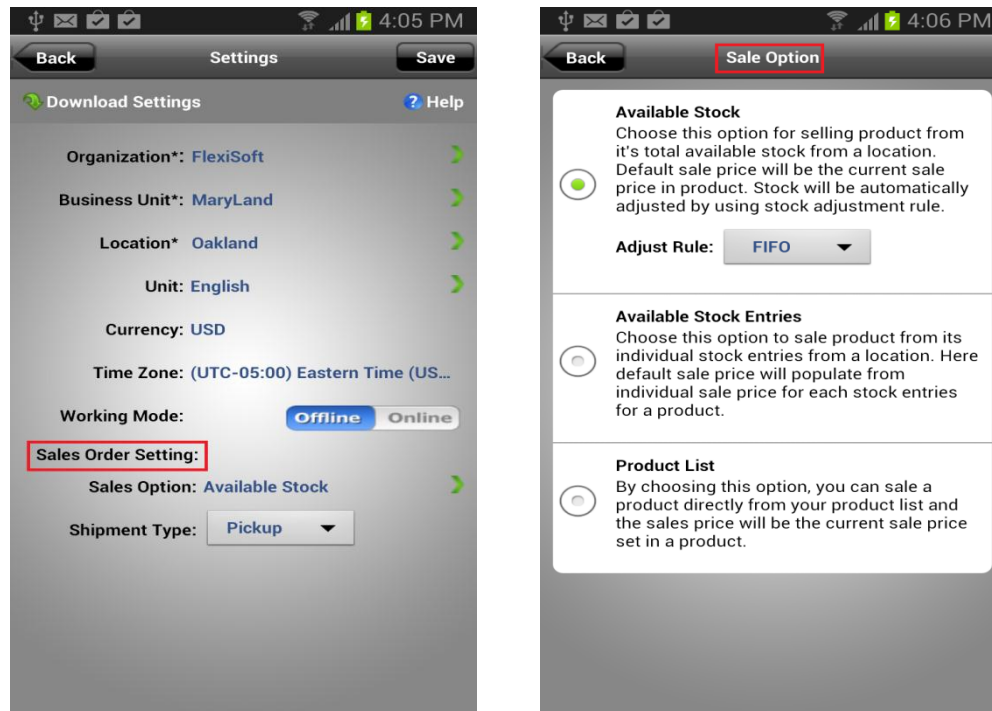
- Online: Synchronize all your data to web server on real time
- Offline: Create data on device only without synchronizing it to web

***Sales Order Settings:***

**Sale Option:** Select options for your sales orders:

a) **Available Stock:** Select for selling product from its total stock from a location.

- Stock Adjustment Rule:
  - i) FIFO: Item which added in stock first will be used first for selling (First In First Out)
  - ii) LIFO: Item which added in stock last will be used first for selling (Last In First Out)



- b) **Available Stock Entries:** Choose this option to sales product from its individual stock entry from a location.
- c) **Product List:** Choose this option to sales directly from your product list. This will not affect your inventory.

**Shipment Type:** Select the shipment type of your sales order.

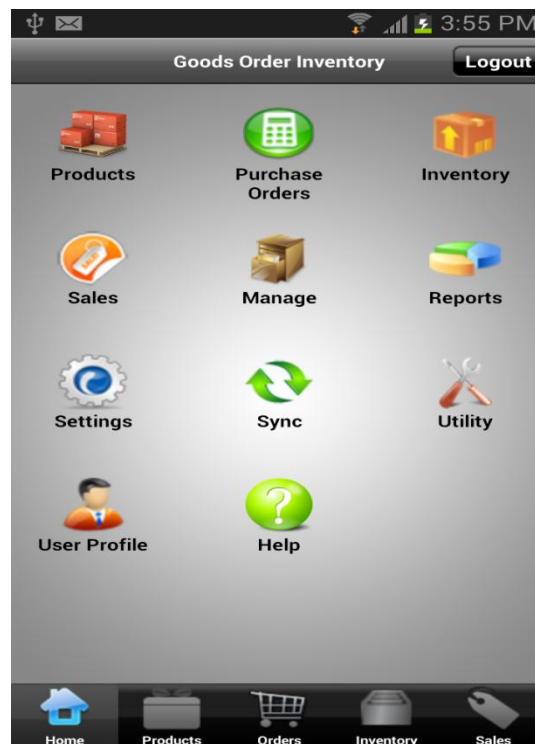
- Pickup
- Delivery

\*Click on “Save” button to save your settings

[Go to Top](#)

## Dashboard

1. On dashboard displaying icons of different sections of application.
2. You just need to select the icon on which you want to work
3. Following are the icon displaying on the dashboard:
  - Product
  - Purchase Order
  - Inventory
  - Sales
  - Manage
  - Reports
  - Settings
  - Sync
  - Utility
  - User Profile
  - Help
  - Click on “Logout” button to logout

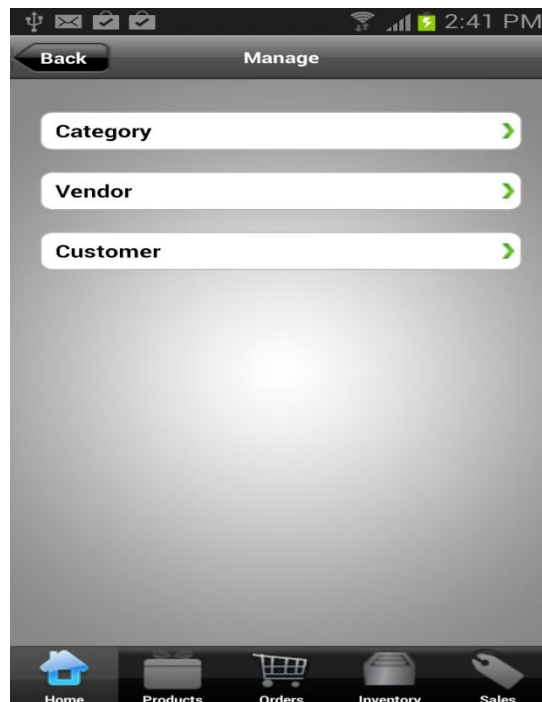


[Go to Top](#)

## Manage

This section contains three sub sections. You can manage your “Category”, “Vendor”, and “Customer” from this section.

1. Category
2. Vendor
3. Customer

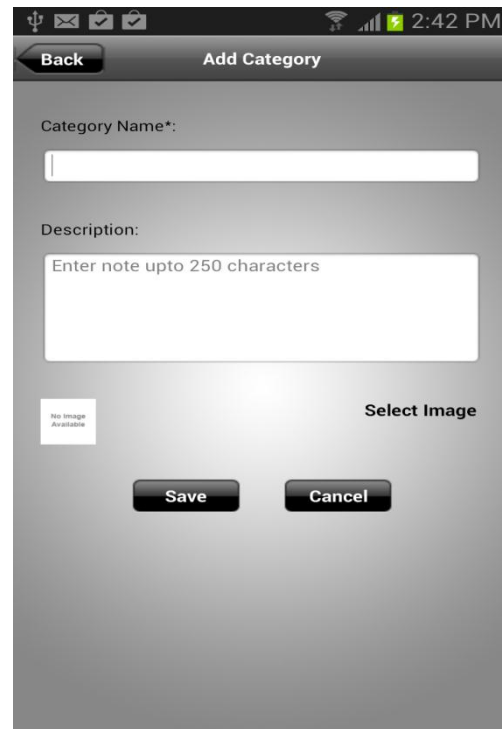
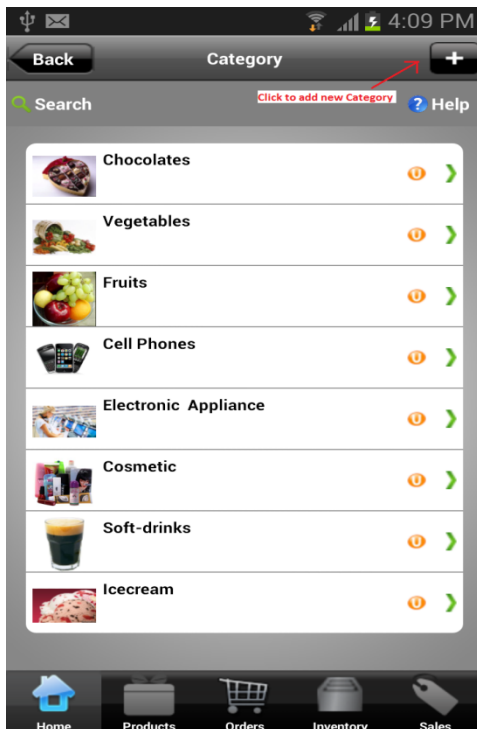


## Category:

*You can perform different actions on categories like add, modify, delete, search etc.*

### Add Category:

1. Click on (+) plus icon which is on the top right corner of the Category screen.
2. By clicking on that icon "Add Category" view will open.
3. You can also add\remove image for the category by clicking on the "Select Image" or "Remove Image" links respectively.

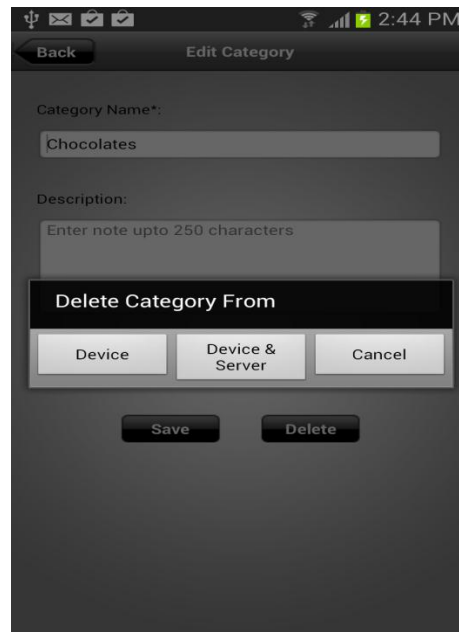
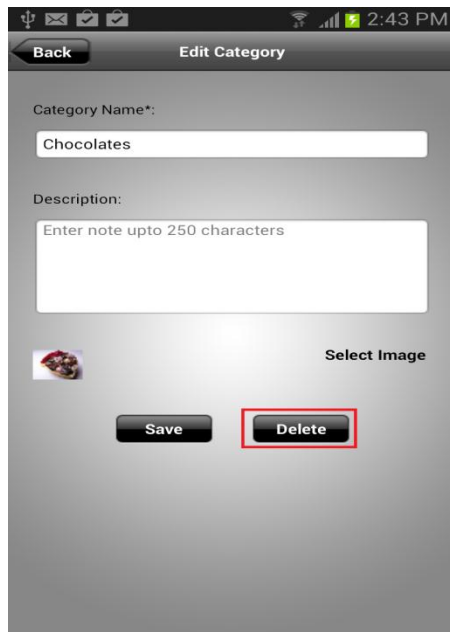


### Update Category:

1. Click on "Category" from Manage section
2. On Category list, select the Category you want to update
3. Update what you want and save the category
4. Your category will be updated

### Deleting Category:

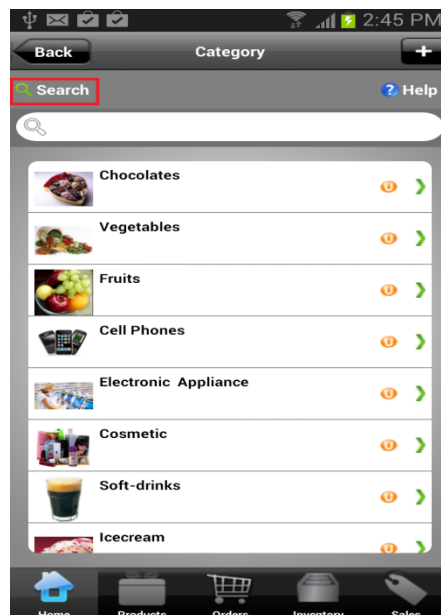
1. Select the Category you want to delete
2. Click on the delete button
3. Your category will be deleted



(\***Note:** Delete from “Device” will delete data only from your device & delete from “Device & server” will delete data from device as well as from web server)

### Search:

1. Click on the “Search” provided on the top left corner of the “Category” screen
2. Search bar will open, where you can search the category.

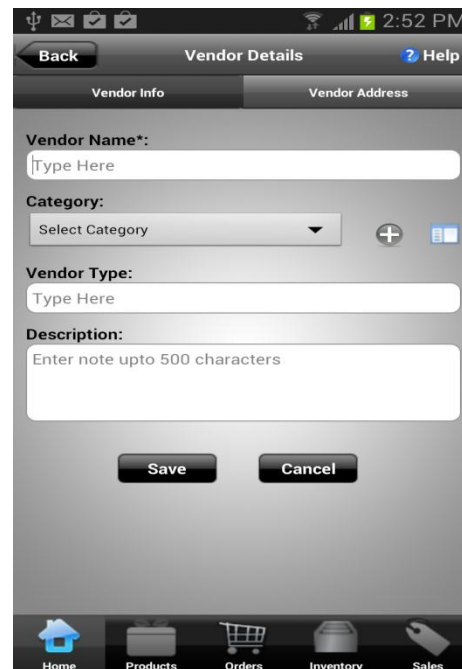
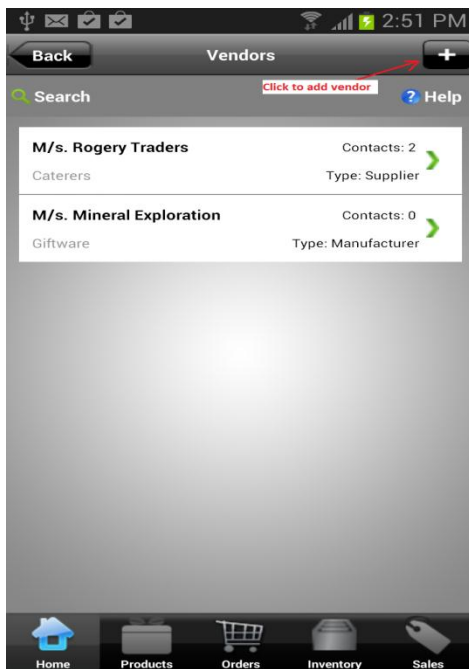


## Vendor:

***You can perform different actions on Vendors like add, modify, delete etc. Also you can add contacts with the vendors.***

### ***Add Vendor:***

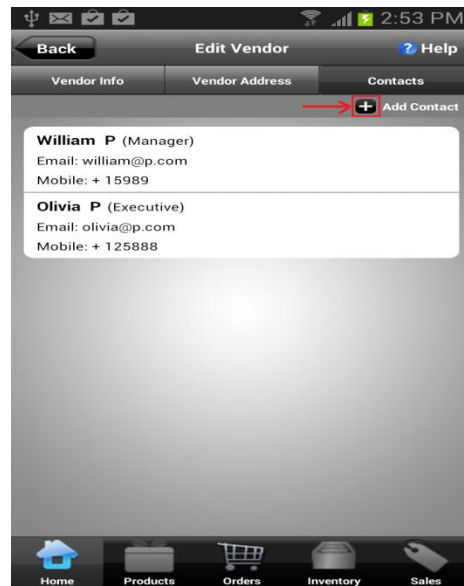
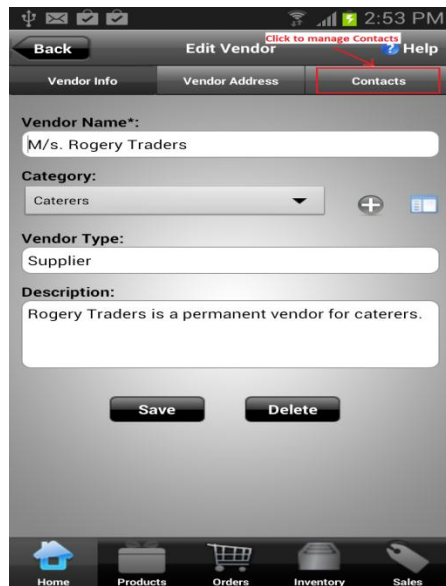
1. Click on (+) plus icon which is on the top right corner on Vendor screen.
2. By clicking on that icon “Add Vendor” view will open.
3. You can select vendor category from the drop down list
4. You can also add vendor category by selecting “+” icon displaying adjacent to Category field



### ***Adding Vendor Contact:***

You can add contacts with your vendors. You can only add contacts after saving vendors.

1. Select any vendor from vendor list
2. On edit vendor screen, select “Vendor Contact” tab
3. Here user can add, update, delete “Vendor Contact”
4. You can also add, update, delete “Contact Type”
5. Just select the vendor contact, and update it

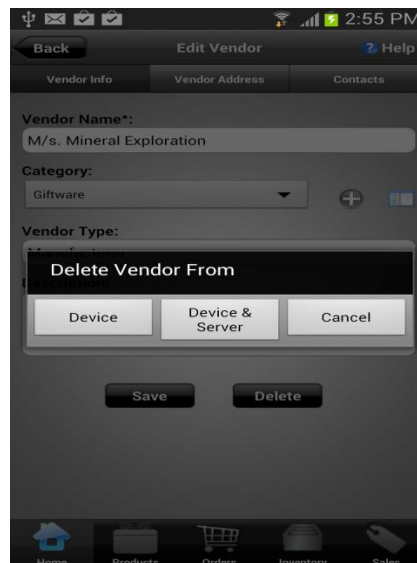
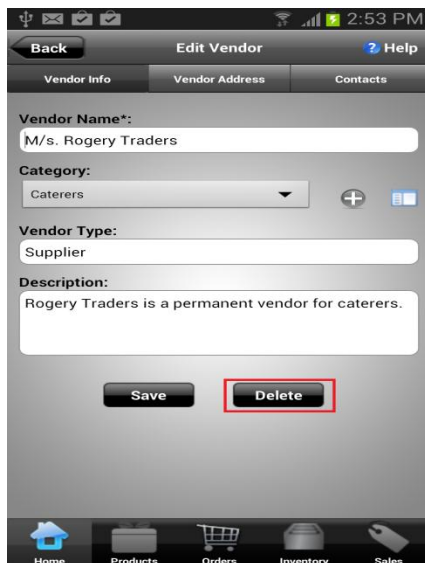


### Update Vendor:

1. Click on "Vendor" from Manage section
2. On Vendor list, select the Vendor you want to update
3. Update what you want and save the Vendor
4. Vendor will be updated

### Deleting Vendor:

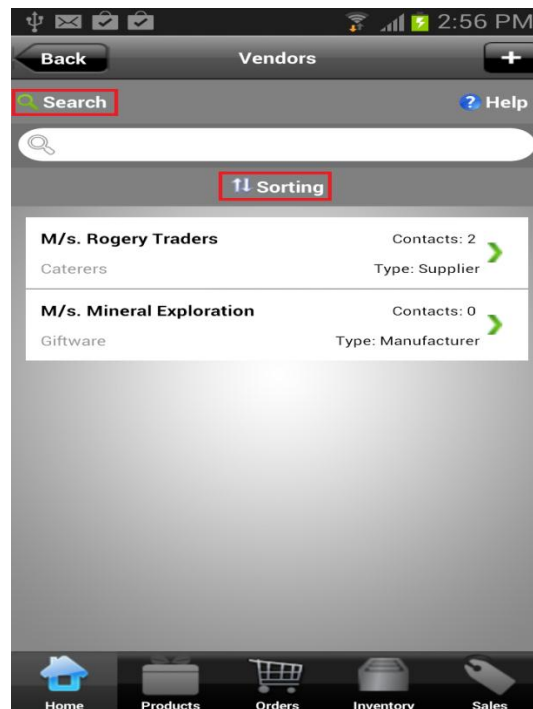
1. Select the Vendor you want to delete
2. Click on the delete button
3. Your vendor will be deleted



(\*Note: Delete from “Device” will delete data only from your device & delete from “Device & server” will delete data from device as well as from web server)

***Search\ Sorting:***

1. Click on the “Search” provided on the top left corner of the screen
2. Search bar and sorting link will open
3. Also you can sort the categories by selecting “Sorting” link



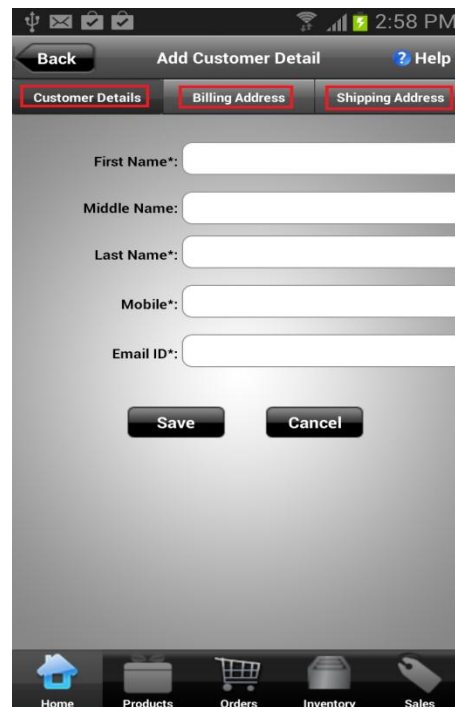
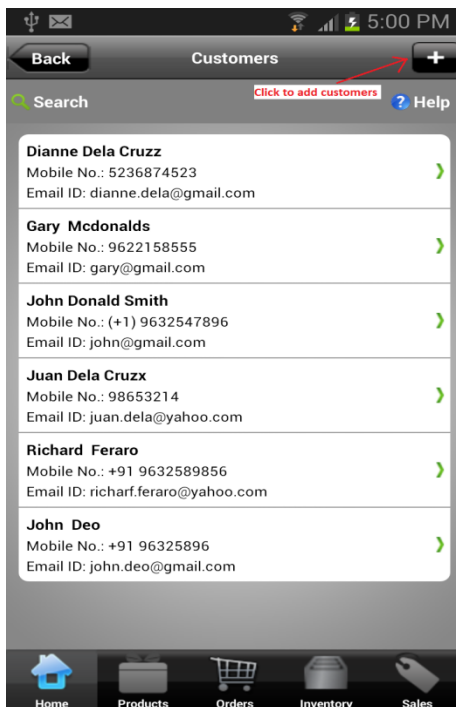
[Go to Top](#)

## Customer:

*You can perform different actions on Customers like add, modify, delete etc.*

### Add Customer:

1. Click on (+) plus icon which is on the top right corner on Customer screen.
2. By clicking on that icon “Add Customer” view will open.
3. Here you can add customer details, Billing\Shipping address of customer
4. Click on “Save” button to save the customer

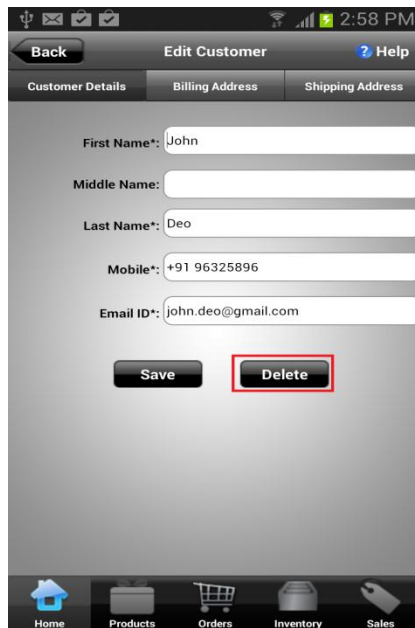


### Update Customer:

1. Click on “Customer” from Manage section
2. On Customer list, select the Vendor you want to update
3. Update details you want and click on “Save” button
4. Customer will be updated

### Deleting Customer:

1. Select the Customer you want to delete
2. Click on the delete button
3. Customer will be deleted



Back Edit Customer ? Help

Customer Details Billing Address Shipping Address

First Name\*: John

Middle Name:

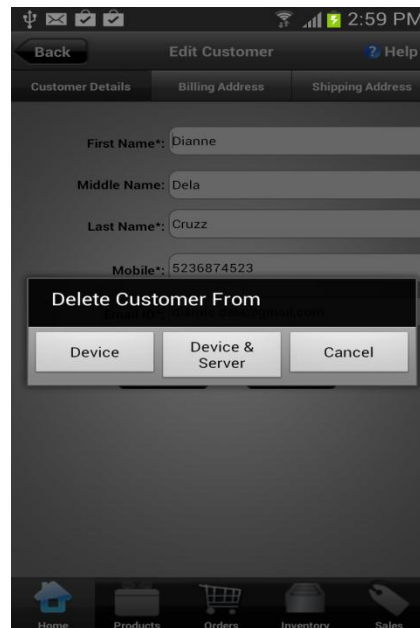
Last Name\*: Deo

Mobile\*: +91 96325896

Email ID\*: john.deo@gmail.com

Save Delete

Home Products Orders Inventory Sales



Back Edit Customer ? Help

Customer Details Billing Address Shipping Address

First Name\*: Dianne

Middle Name: Dela

Last Name\*: Cruzz

Mobile\*: 5236874523

Delete Customer From

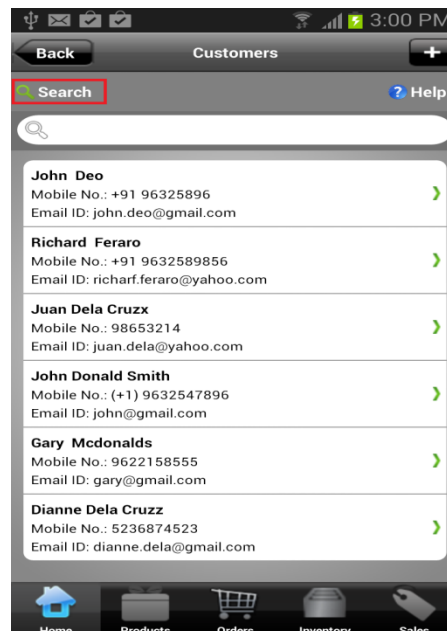
Device Device & Server Cancel

Home Products Orders Inventory Sales

(\*Note: Delete from “Device” will delete data only from your device & delete from “Device & server” will delete data from device as well as from web server)

### Search:

1. Click on the “Search” provided on the top left corner of the screen
2. Search bar will open, from where you can search the customer



Back Customers +

Search ? Help

John Deo  
Mobile No.: +91 96325896  
Email ID: john.deo@gmail.com

Richard Feraro  
Mobile No.: +91 9632589856  
Email ID: richarf.feraro@yahoo.com

Juan Dela Cruzz  
Mobile No.: 98653214  
Email ID: juan.dela@yahoo.com

John Donald Smith  
Mobile No.: (+1) 9632547896  
Email ID: john@gmail.com

Gary Mcdonalds  
Mobile No.: 9622158555  
Email ID: gary@gmail.com

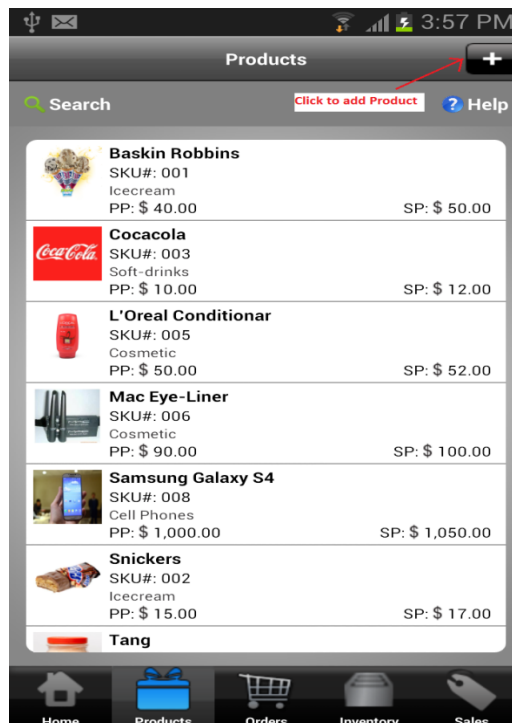
Dianne Dela Cruzz  
Mobile No.: 5236874523  
Email ID: dianne.dela@gmail.com

Home Products Orders Inventory Sales

[Go to Top](#)

## Product

You can perform different actions on the Products, like adding, updating, deleting, searching, filter etc.

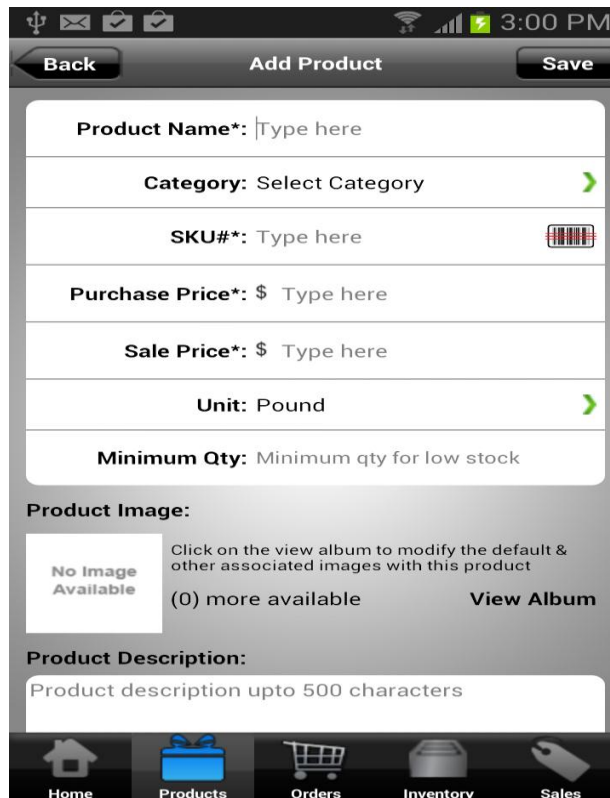


### Add Product

Products will be added under a particular organization, the one on which you are working and selected in your settings.

1. Click on the “Products” icon displaying on the home screen
2. There is a (+) plus icon exists on the top right corner of the product list
3. “Add Product” view will open, having the following attributes:
  - a) **Product Name:** Enter the name of your product
  - b) **Category:** Product can be linked with one or more category, but it is not mandatory to add category:
    - Click on “Select”
    - Displayed selected category list

- Click on “Add Category” link to map category with product
  - Click on “Remove” link to remove the selected category from product
- c) **SKU#:** You can enter the Product number (SKU#) manually or by scanning barcode
- d) **Purchase Price:** Enter Purchase Price of the Product
- e) **Sales Price:** Enter Sale Price of the Product
- f) **Unit:** Select the unit for the product. Unit for a product can be editable until the product is not used in any other section like purchase, sale, and inventory



The screenshot displays the 'Add Product' screen of a mobile application. At the top, there's a status bar with the time 3:00 PM and various icons. Below it, a navigation bar contains 'Back', 'Add Product', and 'Save' buttons. The main form consists of several input fields: 'Product Name\*' with a placeholder 'Type here', 'Category' with a dropdown arrow, 'SKU#\*' with a placeholder 'Type here' and a barcode icon, 'Purchase Price\*' with a dollar sign and 'Type here', 'Sale Price\*' with a dollar sign and 'Type here', 'Unit' with a dropdown arrow and 'Pound' selected, and 'Minimum Qty' with a placeholder 'Minimum qty for low stock'. Below the form, there's a 'Product Image' section with a 'No Image Available' placeholder and a 'View Album' link. At the bottom, there's a 'Product Description' field with a placeholder 'Product description upto 500 characters'. The app's navigation bar at the very bottom includes icons for 'Home', 'Products', 'Orders', 'Inventory', and 'Sales'.

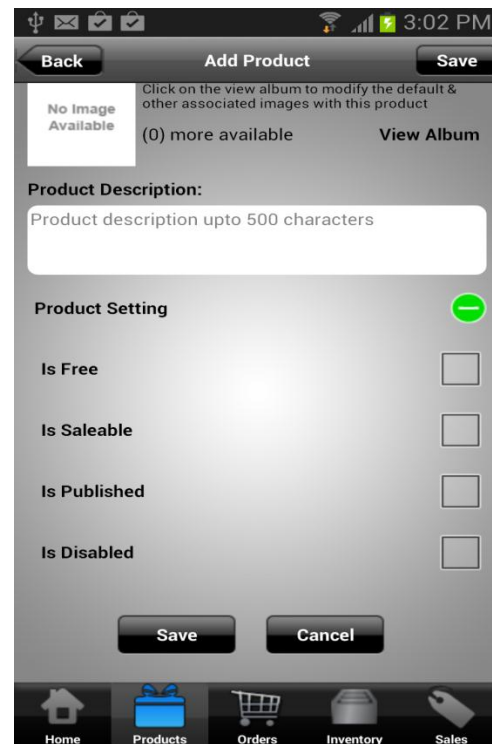
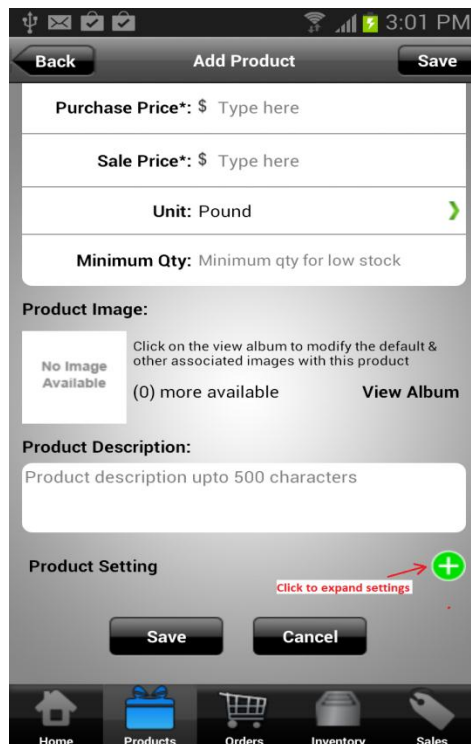
- g) **Minimum Qty:**
- You can define the minimum inventory quantity of your product here.
  - If the inventory quantity of the product goes below this then it will display in low stock report

**h) Product Image:**

- Click on “View Album” button to view, add or remove the product image
- It will display the selected images available for this product
- Click on “Add Image” link to add product images from your library
- Click on “Remove” link to remove any image

**i) Product Description:** You can add product description if any.**j) Product Settings:** These settings will be applicable on the product

- Click on “+” icon to expand product settings:
- Is Free: Select to make the product “Free” (Sales Price=0)
- Is Saleable: Select to make the product available for sales
- Is Published: Select to publish the product (only published product available to use in other sections of application)
- Is Disabled: Select to make the product disabled (a disabled product will not display on Product list)

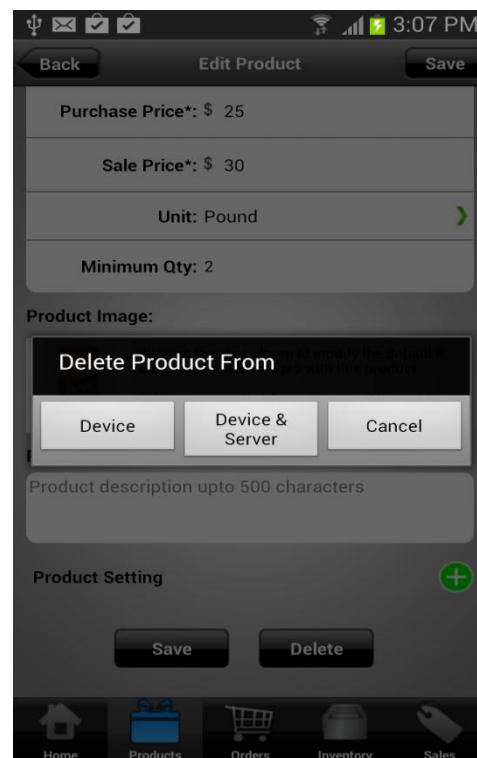
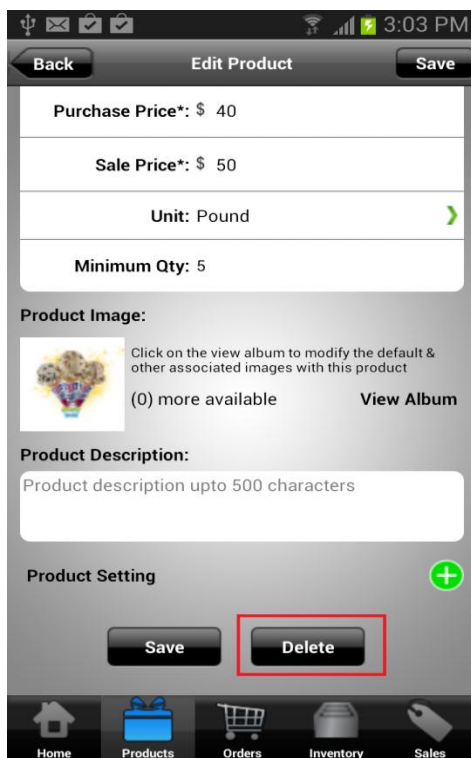


### Update Product:

1. Select Product section from dashboard
2. On Product list, select the Product you want to update
3. Update details you want and click on "Save" button
4. Product will be updated

### Deleting Product:

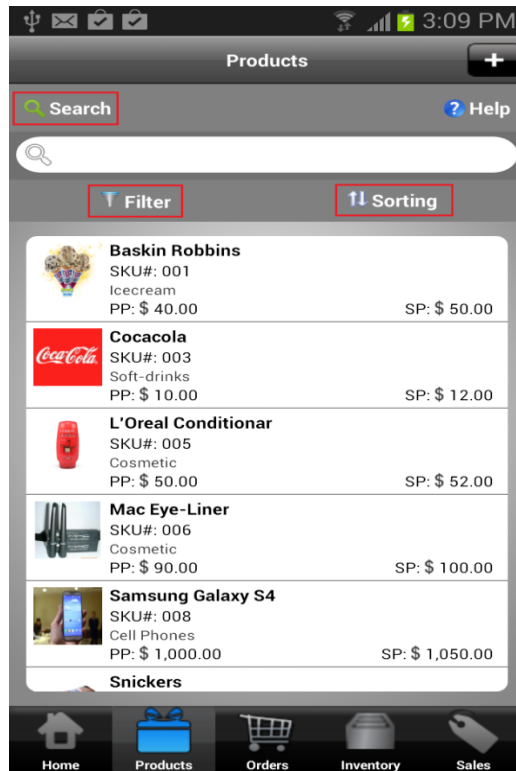
1. On Product list, select the Product you want to delete
2. Click on the delete button
3. Product will be deleted



(\*Note: Delete from "Device" will delete data only from your device & delete from "Device & server" will delete data from device as well as from web server)

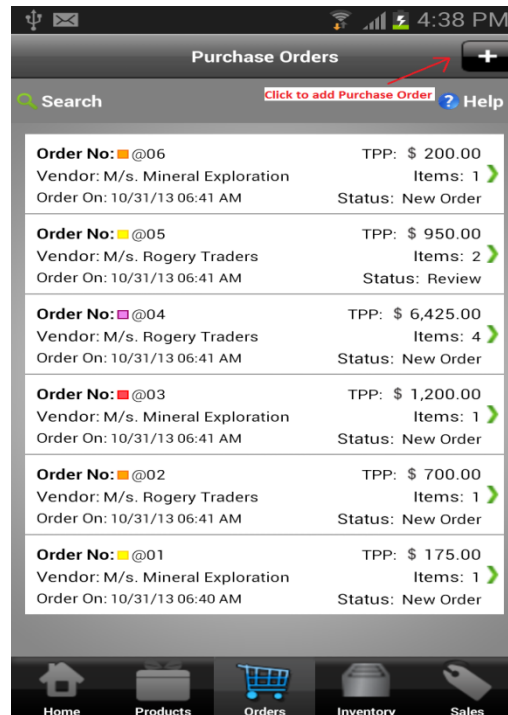
***Search\Filter\Sorting:***

1. Click on the “Search” provided on the top left corner of the screen
2. Search bar will open
3. Also you can Filter and Sort the products by selecting “Filter” and “Sorting” links

[Go to Top](#)

## Purchase Order

You can manage all your purchase orders for a particular location using this section. You can perform add, update, delete, fulfill, searching orders etc. All the fulfilled items will be sent to your inventory.



### Add Purchase Order:

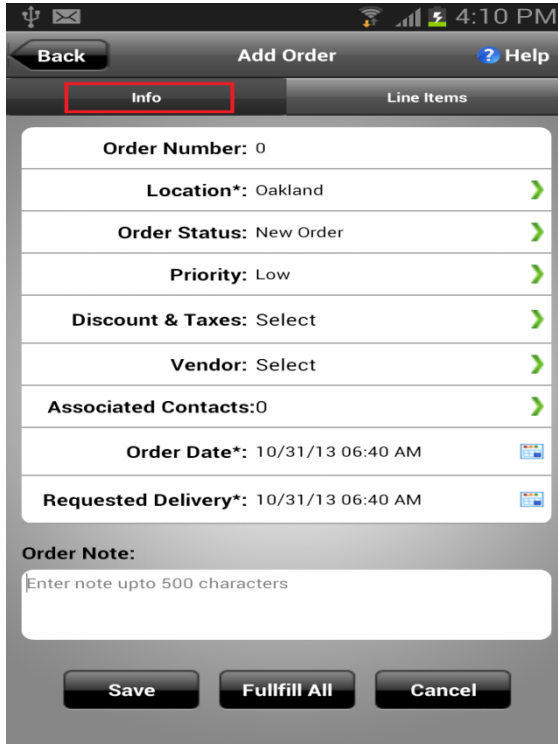
You can add new Purchase Order by following the steps below:

1. Select "Purchase Order" icon displaying on the home screen
2. Click on the (+) plus icon exists on the top right corner of the "Purchase Orders" screen
3. Add Purchase Order have two tabs : (Info Tab & Line Items Tab)

➤ **Info Tab:** You can add information about your purchase order:

- a) **Order Number:** This will generate automatically as per the settings saved on web server
  - b) **Location:** This will be the default location (as per your settings). Click on the "Location" if you want to add product for any other location. List of all the location of your business unit will be displayed.
- (\*Note: You cannot change location of a partially fulfilled order)

- c) **Order Status:** You can select any status as per your need (New Order\Review\Sent to Vendor)
- d) **Priority:** You can set the priority as per your need (Low\Medium\High\Immediate)
- e) **Discount & Taxes:** You can set discount & taxes on your order. This will be applicable on your fulfilled quantity

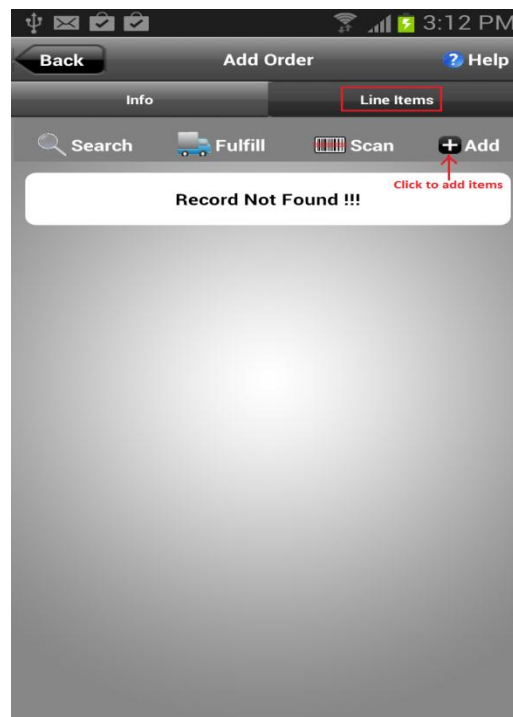


- f) **Vendor:** You can add vendor with your purchase order
- g) **Associated Contacts:** Contacts associated with the selected vendor will automatically added
- h) **Order Date:** You can select the order date
- i) **Requested Delivery:** Date for delivery
- j) **Note:** You can add your order notes here
- k) Click on "Save" button to add purchase order

- **Line Item Tab:** Buttons displaying at the top of the line item screen.

**Add:**

- a) To add line item click on “+Add” button
- b) Screen navigate to Product list
- c) Select any product which you want to add in purchase order
- d) “Add Line Item” screen displayed, which have the item’s details
- e) You can update the “Unit Purchase Price, Quantity and Unit” of item
- f) If you change the unit, price will be converted as per the selected unit
- g) You can also add “Notes” for your line items
- h) Click on “Save” button to add the item in your order



**Scan:** You can also add line items directly from product list by searching its barcode

- a) Click on “Scan” button
- b) Barcode scanner open, read the barcode
- c) If any item of scanned barcode present in the product list it will open the add line item screen
- d) If no item of scanned barcode present in the barcode, you will get the option to first add the product and then add it in your order

**Fulfill:** Read “Fulfill a Purchase Order” section for this.

**Search:** You can search, filter and sort the line items of purchase order.

- Click on the "Search" button
- Search bar will open
- Also you can Filter and Sort the line items by selecting "Filter" and "Sorting" links

#### *Update Purchase Order:*

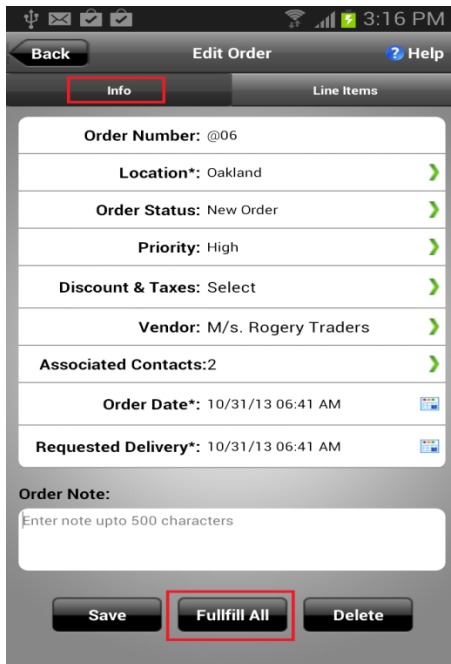
- Select Purchase order section from dashboard
- On Purchase Order list, select the order you want to update
- Update details you want and click on "Save" button
- Purchase order will be updated

#### *Fulfill a Purchase Order:*

You can fulfill a purchase order fully or partially. All the fulfilled items will be sent to your inventory.

**Fulfill All:** This will fulfill the whole order with all included line items

- Click on "Purchase Order" icon from dashboard
- Select any order from "Purchase Orders" list
- On "Info" tab displaying "Fulfill All" button at the bottom of the screen
- Click on "Fulfill All" button, this will fulfill your whole purchase order and close it
- Ask for confirmation, click on "Yes"
- Your order will be fulfilled and sent to closed purchase order with order status "Fulfilled"



Back Edit Order Help

Info Line Items

Order Number: @06

Location\*: Oakland >

Order Status: New Order >

Priority: High >

Discount & Taxes: Select >

Vendor: M/s. Rogery Traders >

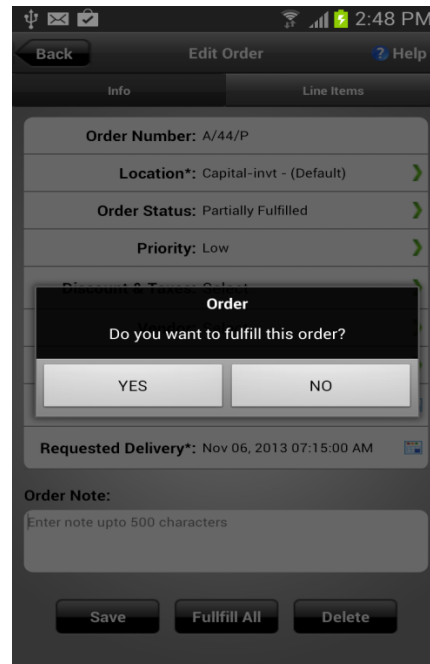
Associated Contacts:2 >

Order Date\*: 10/31/13 06:41 AM

Requested Delivery\*: 10/31/13 06:41 AM

Order Note:  
Enter note upto 500 characters

Save **Fulfill All** Delete



Back Edit Order Help

Info Line Items

Order Number: A/44/P

Location\*: Capital-invt - (Default) >

Order Status: Partially Fulfilled >

Priority: Low >

Discount & Taxes: Select >

**Order**  
Do you want to fulfill this order?

YES NO

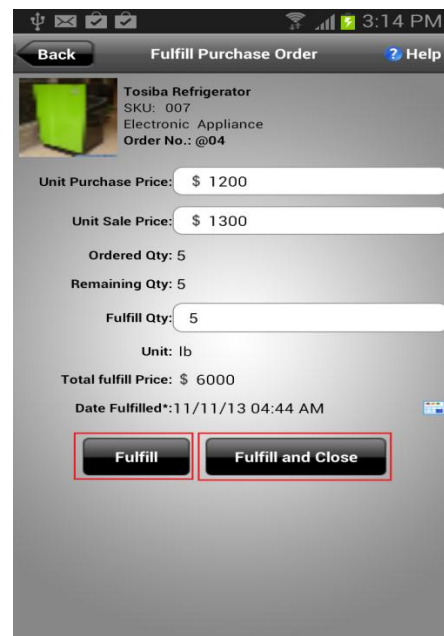
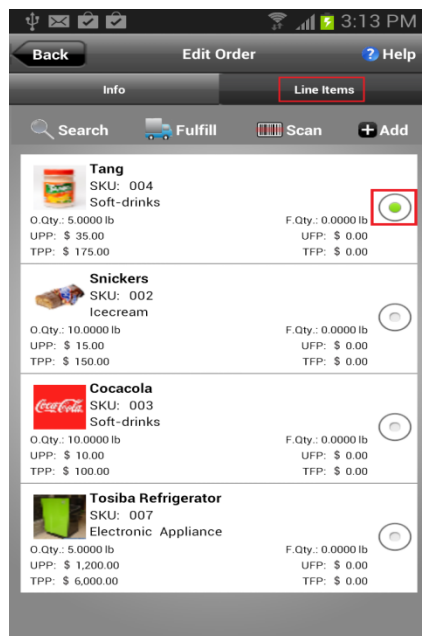
Requested Delivery\*: Nov 06, 2013 07:15:00 AM

Order Note:  
Enter note upto 500 characters

Save Fulfill All Delete

### Partial\Fully Fulfill:

1. Go to 'Line Items' tab
2. Displaying all the items associated with the purchase order
3. Click on the radio button to select an item you want to fulfill
4. Click on "Fulfill" button displaying above the item list
5. Ask for confirmation, select "Yes"
6. Fulfill Purchase order list displayed
7. Enter the quantity you want to fulfill in "Fulfill Qty" field
8. There are two option provided to fulfill

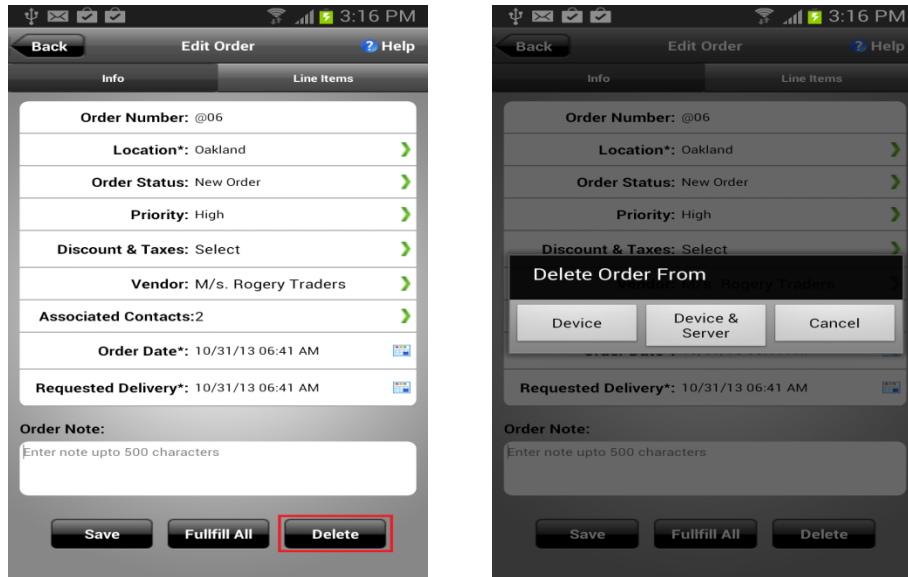


- **Fulfill:**
  - This will fulfill the entered quantity of the selected item
  - All the other items of the purchase order still available to fulfill, and the order will be partially fulfilled
  - Order will be fully closed after you fulfill all the quantity of all the associated items of purchase order
- **Fulfill & Close:**
  - This will close the order
  - The entered quantity of the selected item will be fulfilled, but all the remaining quantity and remaining items will be discarded

### Deleting Purchase Order:

1. Select Purchase order section from dashboard
2. On Purchase Order list, select the order you want to delete
3. Click on the delete button

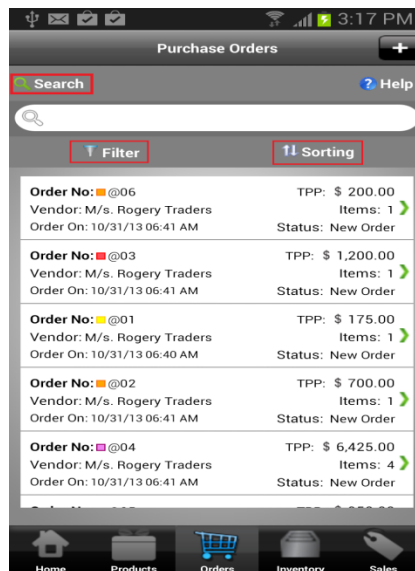
#### 4. Purchase Order will be deleted



(\*Note: Delete from “Device” will delete data only from your device & delete from “Device & server” will delete data from device as well as from web server)

#### *Search\Filter\Sorting:*

1. Select Purchase order section from dashboard
2. Click on the “Search” provided on the top left corner of the screen
3. Search bar will open
4. Also you can Filter and Sort the purchase order by selecting “Filter” and “Sorting” links

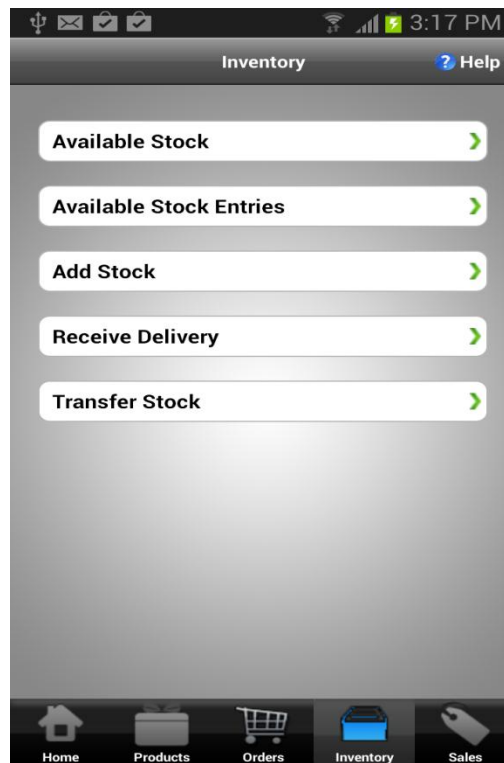


[Go to Top](#)

## Inventory

This section provides you the facility to manage your stock of a particular business unit. There are following sub-sections of this section:

- i) Available Stock: To view transaction details of stock items in all locations. You can also add, update, and delete stock items.
- ii) Available Stock Entries: To add, update, delete a stock item. This will display stock entries of an item in all locations.
- iii) Add Stock: To add item in stock from product list
- iv) Receive Delivery: To add item in stock by fulfilling a purchase order
- v) Transfer Stock: Only available on “GOIS Web Application”

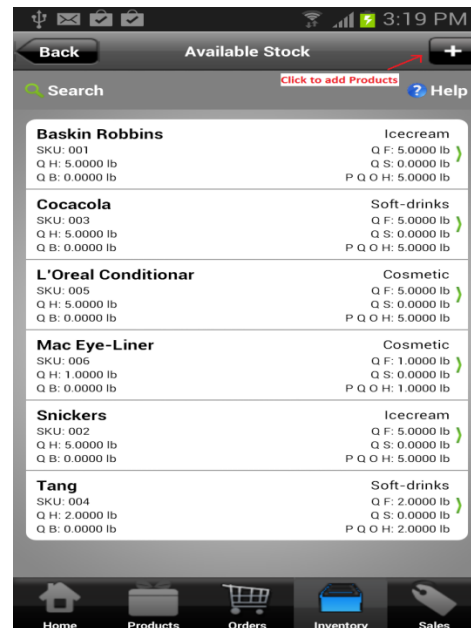
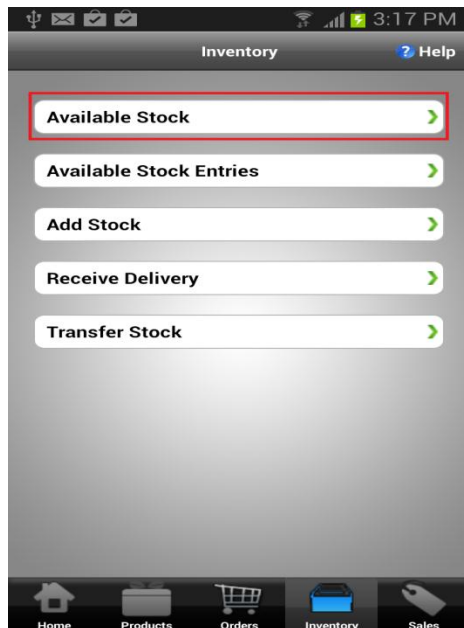


## i) Available Stock:

Using this section, you can check transactions of your stock items. You can also add items from product list from this section as well.

### Adding items in Stock:

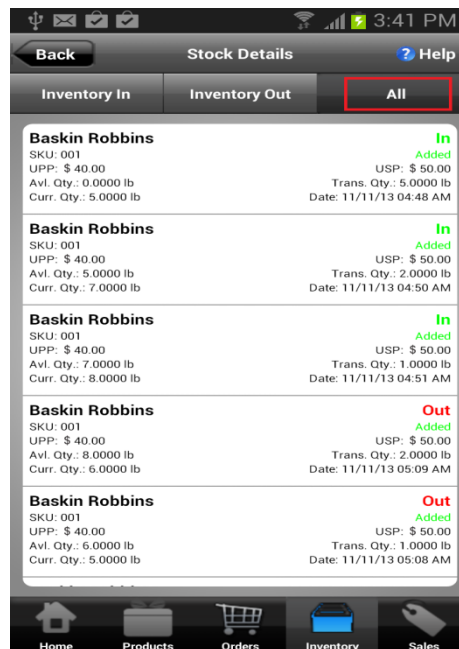
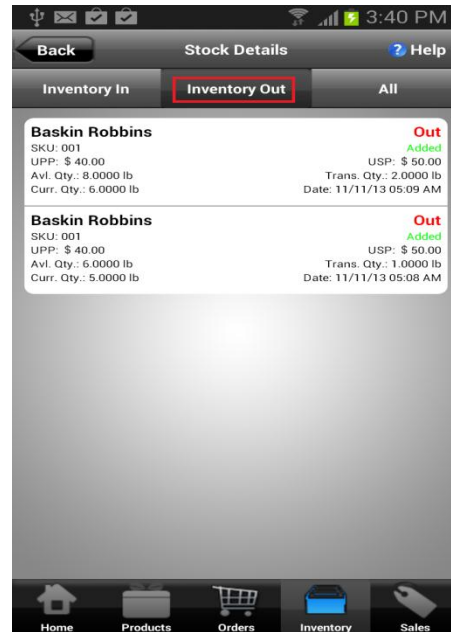
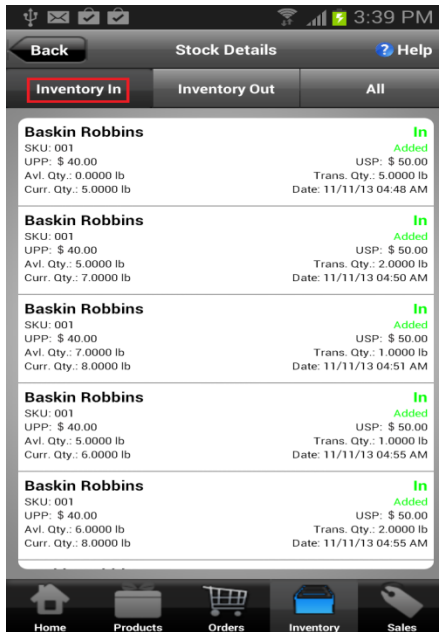
- Select "Inventory" icon displaying on the home screen
- Select "Available Stock" from inventory screen
- List of available stock items across all the locations of selected business unit will be displayed
- Click on the (+) plus icon displaying on the top right corner of "Available Stock" screen
- Product list open
- Select the product you want to add in your stock
- Add Inventory screen displayed
- You can now update item's details (Unit Purchase Price, Unit Sale Price, Quantity)
- You can also add item notes
- Click on "Save" button to add the product in stock



### View Stock Transaction:

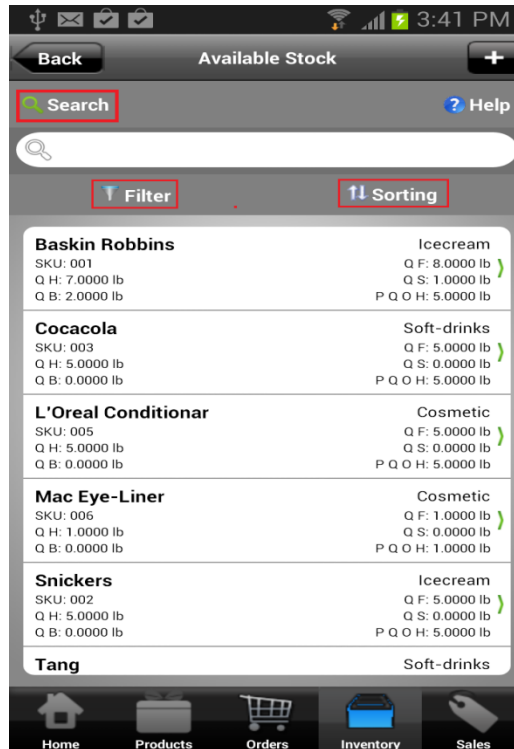
- Select "Inventory" icon displaying on the home screen
- Select "Available Stock" from inventory screen
- Displaying all your stock items of selected business unit for all locations
- Select any stock item
- Available Stock Details screen of the item displayed
- There are three different tabs from where you can view all your inventory item transactions:

- **Inventory In:** This section displays the details of the item when it has been added in the inventory.
- **Inventory Out:** This section display the details of the inventory item after sales.
- **All:** This section displays all the transaction done from Inventory



**Search\Filter\Sorting:**

1. Click on the "Search" link provided on the top left corner of "Inventory On-Hand" screen
2. Search bar will open
3. Also you can Filter and Sort the products by selecting "Filter" and "Sorting" links

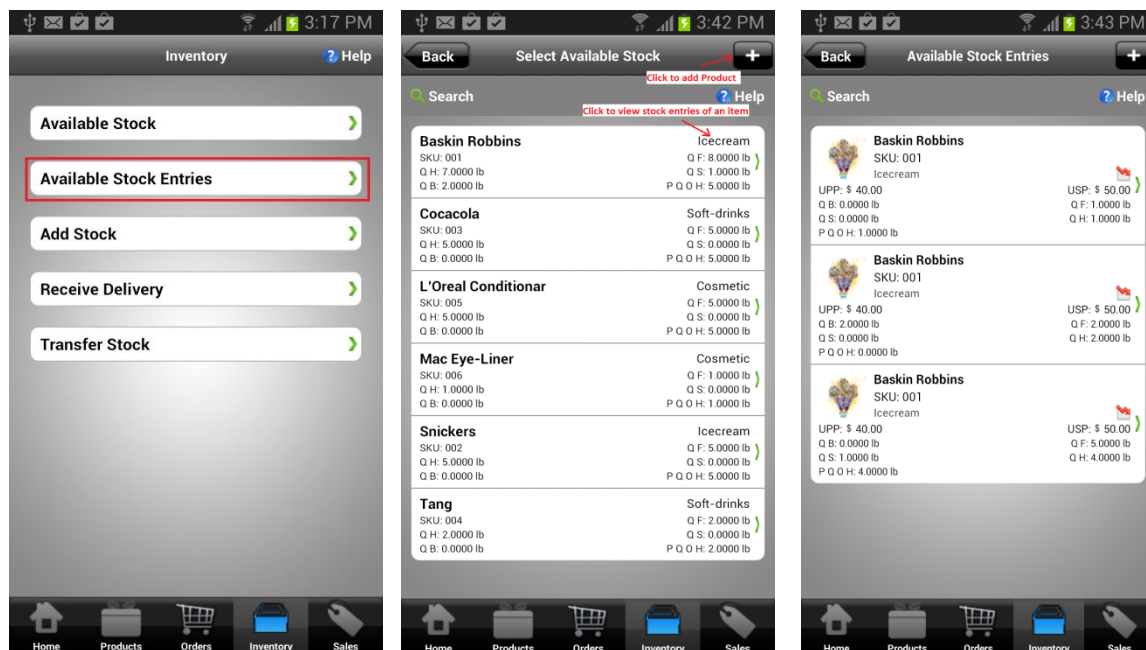


## ii) Available Stock Entries:

Using this section you can view individual entries of you stock items. Also you can perform different actions on your stock like add, update, and delete, searching etc.

### View stock Entries:

- Select "Inventory" icon displaying on the home screen
- Select "Available Stock Entries" from inventory screen
- List of available stock items across all the locations of selected business unit will be displayed
- Select any item
- All the individual entries of the selected item will be displayed
- You can also edit stock item by simple selecting the item



### Adding items in Inventory:

- Select "Inventory" icon displaying on the home screen
- Select "Available Stock Entries" from inventory screen
- List of available stock items across all the locations of selected business unit will be displayed
- Click on the (+) plus icon displaying on the top right corner of "Select Available Stock" screen
- Product list displayed

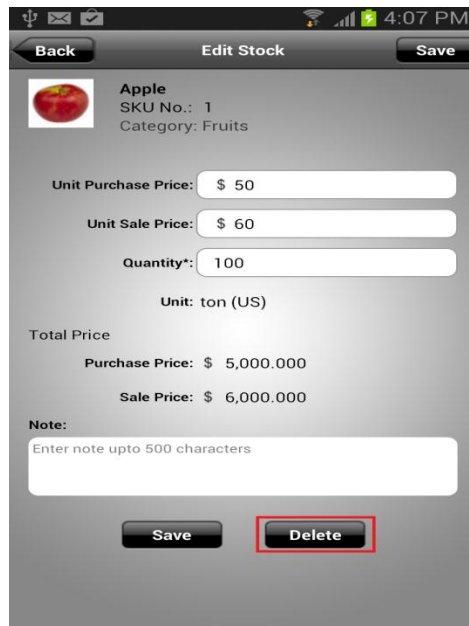
- f) Select the product you want to add in your inventory
- g) Add Inventory screen displayed
- h) You can now update item's details (Unit Purchase Price, Unit Sale Price, Quantity)
- i) You can also add item notes
- j) Click on "Save" button to add the product in stock

**Update a Stock Item:** (*\*This feature currently not available on device for this release*)

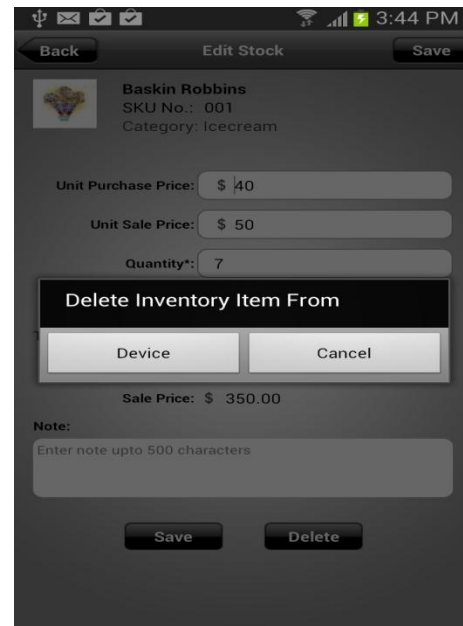
- a) On "Select Available Stock " screen, select the stock item you want to update
- b) Update details you want and click on "Save" button
- c) Stock Item will be updated

**Deleting a Stock Item:**

- a) On "Select Available Stock" screen, select the stock item you want to delete
- b) Click on the delete button
- c) Stock item will be deleted
- d) If stock item not synced to web server then it will only ask to delete the item from your device only



The screenshot shows the 'Edit Stock' screen for an item named 'Apple' (SKU No.: 1, Category: Fruits). The screen has a 'Back' button at the top left and a 'Save' button at the top right. Below the item name, there are input fields for 'Unit Purchase Price' (\$ 50), 'Unit Sale Price' (\$ 60), and 'Quantity\*' (100). The unit is set to 'ton (US)'. Below these fields, the 'Total Price' is calculated: 'Purchase Price: \$ 5,000.000' and 'Sale Price: \$ 6,000.000'. At the bottom, there is a 'Note' field with the placeholder 'Enter note upto 500 characters'. Two buttons, 'Save' and 'Delete', are at the bottom. The 'Delete' button is highlighted with a red rectangle.

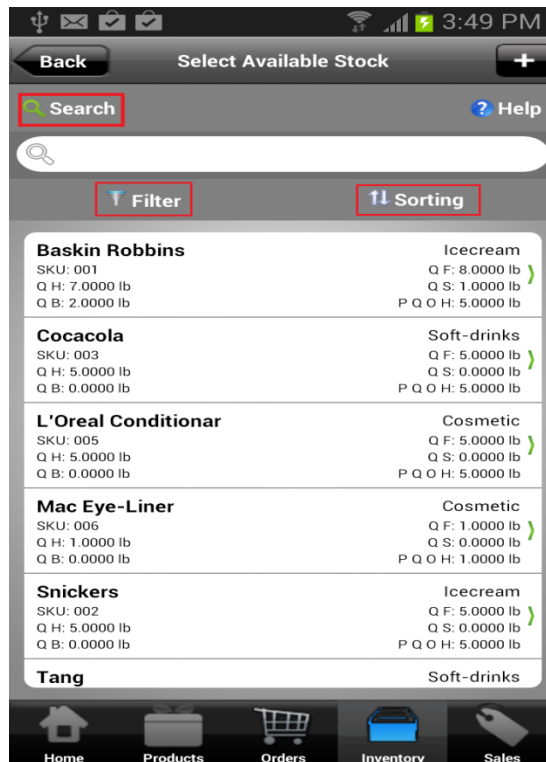


The screenshot shows the 'Edit Stock' screen for an item named 'Baskin Robbins' (SKU No.: 001, Category: Icecream). The screen has a 'Back' button at the top left and a 'Save' button at the top right. Below the item name, there are input fields for 'Unit Purchase Price' (\$ 40), 'Unit Sale Price' (\$ 50), and 'Quantity\*' (7). The unit is set to 'ton (US)'. Below these fields, the 'Total Price' is calculated: 'Purchase Price: \$ 350.00' and 'Sale Price: \$ 350.00'. At the bottom, there is a 'Note' field with the placeholder 'Enter note upto 500 characters'. Two buttons, 'Save' and 'Delete', are at the bottom. A modal dialog box is displayed in the center, titled 'Delete Inventory Item From', with two options: 'Device' and 'Cancel'.

(\*Note: 1. You can only delete unsynchronized data. Inventory data once synced to web server cannot be deleted using device.  
2. Delete from "Device" will delete data only from your device & delete from "Device & server" will delete data from device as well as from web server)

### Search\Filter\Sorting:

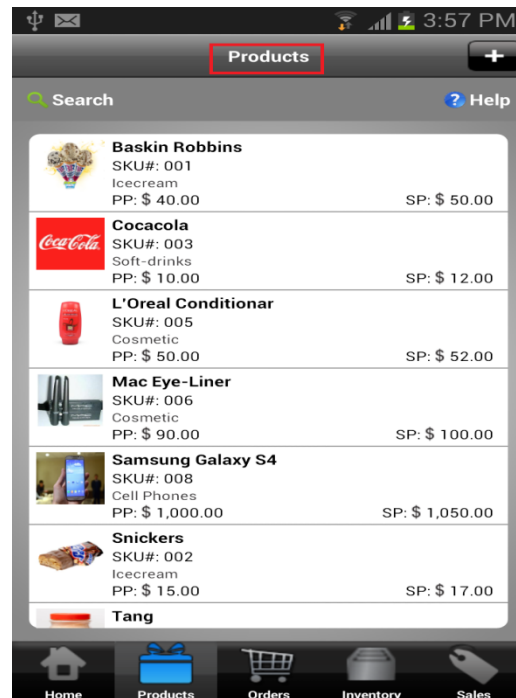
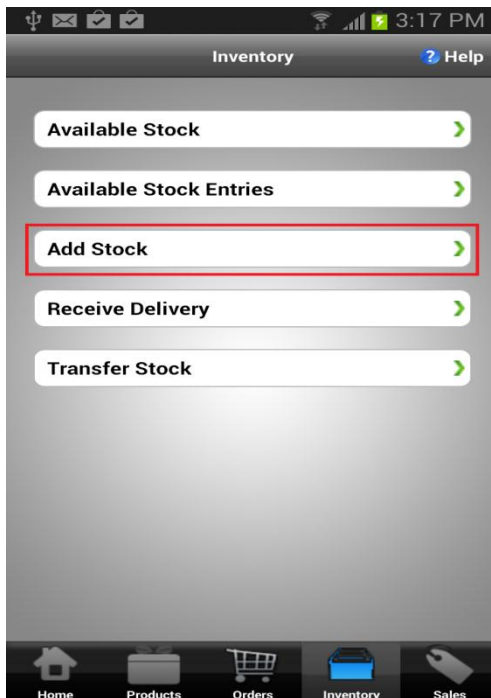
- Click on the "Search" link provided on the top left corner of "Select Available Stock" screen
- Search bar will open
- Also you can "Filter\Sort" the stock items by selecting "Filter" and "Sorting" links



### iii) Add Stock:

This section allows you to add stock directly from your product list.

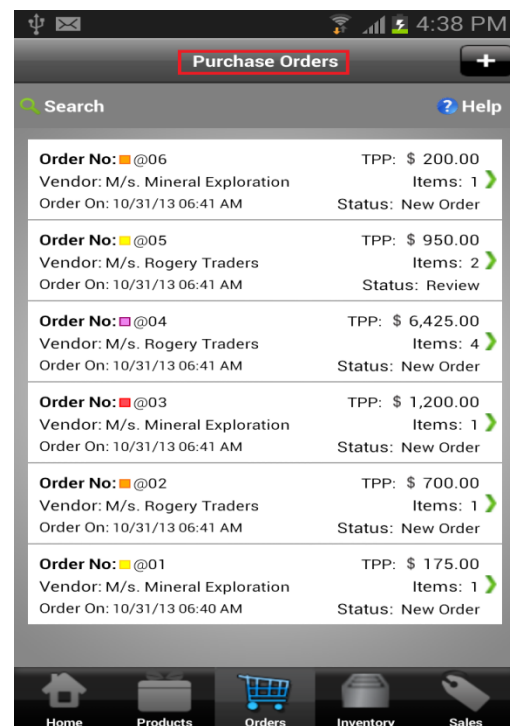
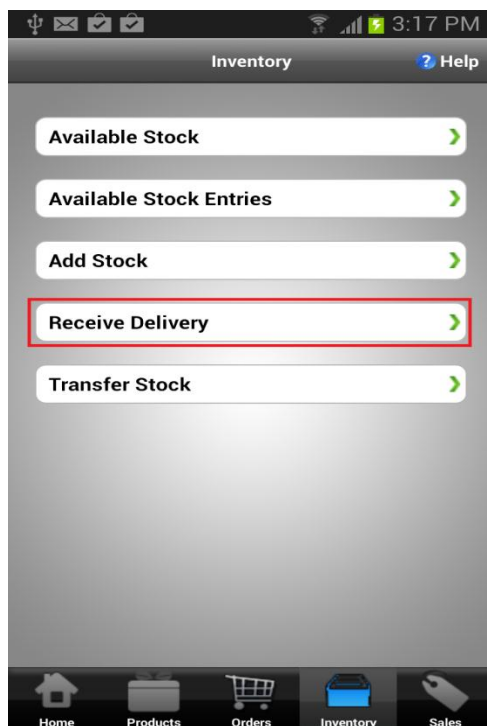
- a) Select "Inventory" icon displaying on the home screen
- b) Select "Add Stock" from inventory screen
- c) Product list will be displayed
- d) Select the product you want to add in your inventory
- e) Add Inventory screen displayed
- f) You can now update item's details (Unit Purchase Price, Unit Sale Price, Quantity)
- g) You can also add item notes
- h) Click on "Save" button to add the product in stock



#### iv) Receive Delivery:

This section allows you to add stock items by fulfilling a purchase order.

- Select "Inventory" icon displaying on the home screen
- Select "Receive Delivery" from inventory screen
- Purchase Order screen will be displayed
- Here, you can select any purchase order which you want to add in your stock or add a new purchase order
- After fulfilling a purchase order the items of fulfilled purchase order will be added in your stock



#### v) Transfer Stock:

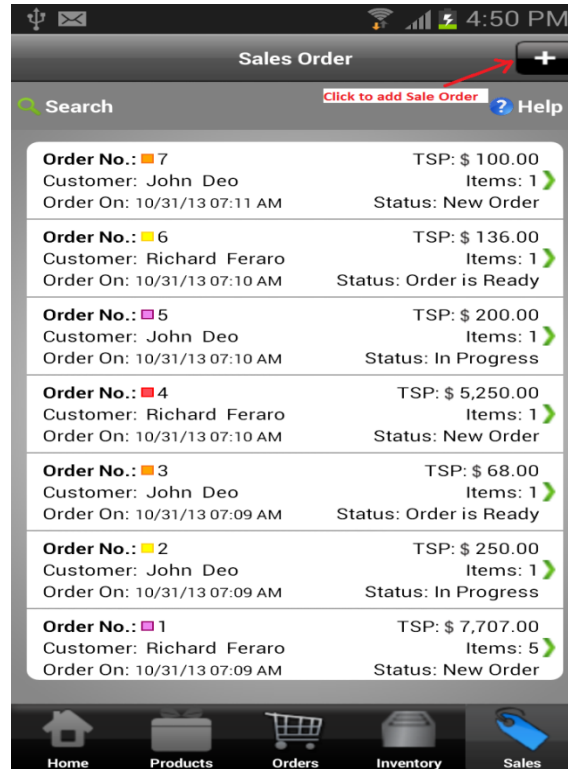
Using this section you can transfer your stock items between different locations. This feature currently available on web application.

[Go to Top](#)

## Sales Order

You can manage all your sale orders for a particular location using this section. You can perform add, update, delete, fulfill, searching orders etc.

Currently you can only “Dispatch and Close” a sales order using web application only. This feature is not available in mobile app now.



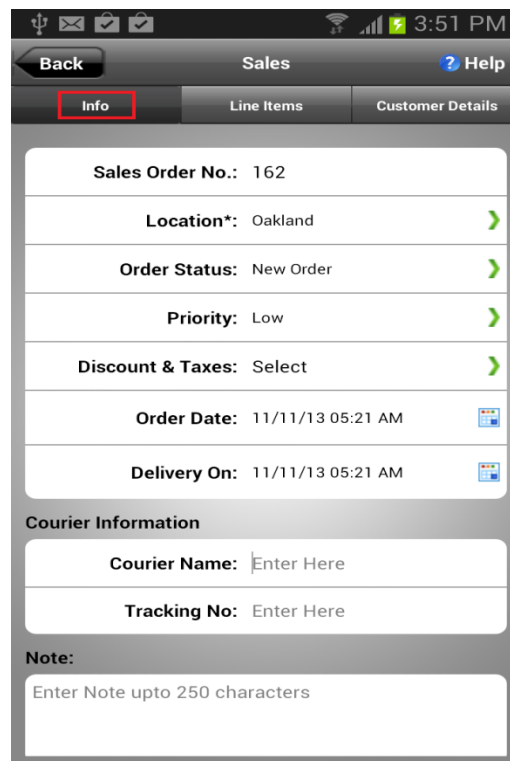
### Add Sales Order:

You can add new Sales Order by following the steps below:

1. Select “Sales Order” icon displaying on the home screen
2. Click on the (+) plus icon exists on the top right corner on “Sales Orders” screen
3. “Add Sales Order” screen display, which have three tabs (Info, Line Items & Customer Details)

➤ **Info Tab:** To add information about your Sales order:

- a) **Sales Order Number:** This will generate automatically as per the settings saved on web server
- b) **Location:** This will be the default location (as per your settings). Click on the “Location” if you want to add product for any other location. List of all the location of your business unit will be displayed.  
(Note\*: You cannot change location of a partially fulfilled order)



The screenshot shows a mobile application interface for a sales order. At the top, there's a status bar with icons for USB, email, and battery, and the time 3:51 PM. Below the status bar is a navigation bar with 'Back', 'Sales', and 'Help' buttons. Underneath is a tab bar with 'Info' (highlighted with a red box), 'Line Items', and 'Customer Details'. The main content area displays the following information:

- Sales Order No.:** 162
- Location\*:** Oakland (with a green arrow icon)
- Order Status:** New Order (with a green arrow icon)
- Priority:** Low (with a green arrow icon)
- Discount & Taxes:** Select (with a green arrow icon)
- Order Date:** 11/11/13 05:21 AM (with a calendar icon)
- Delivery On:** 11/11/13 05:21 AM (with a calendar icon)

Below this is a section for **Courier Information** with two input fields:

- Courier Name:** Enter Here
- Tracking No:** Enter Here

At the bottom, there's a **Note:** section with a text area labeled 'Enter Note upto 250 characters'.

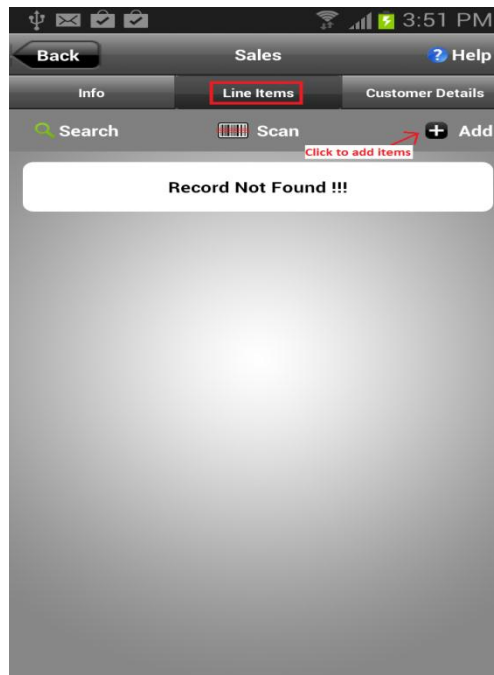
- c) **Order Status:** You can select any status as per your need (New Order\Review\Sent to Vendor)
- d) **Priority:** You can set the priority as per your need (Low\Medium\High\Immediate)
- e) **Discount & Taxes:** You can set discount & taxes on your order. This will be applicable on your fulfilled quantity
- f) **Order Date:** You can select the order date

- g) **Delivery On:** Date for delivery
  - h) **Note:** You can add your order notes here
  - i) **Courier Information**
    - Courier Name: You can give your courier name if any
    - Tracking No.: You can give your courier name if any
  - j) **Note:** You can add your order notes here
4. Click on “Save” button to save sale order

➤ **Line Item Tab:** Buttons displaying at the top of the line item screen.

**Add:** You can add items in your sales order from your “Stock or Product List”, depending upon your sale order settings.

- a) To add line item click on “+Add” button
- b) Screen navigate to Inventory list (if sales from stock) or Product list (if sales from product list), as per your sale order settings.
- c) Select any product which you want to add in sales order
- d) “Add Line Item” screen displayed, which have the item’s details
- e) You can update the “Unit Sale Price, Quantity, Discount and Unit” of item
- f) If you change the unit, price will be converted as per the selected unit
- g) You can also add “Notes” for your line items
- h) Click on “Save” button to add the item in your order



**Scan:** You can also add lite items directly from product list\inventory by searching its barcode.

- a) Click on “Scan” button
- b) Barcode scanner open, read the barcode
- c) If any item of scanned barcode present in the product list\inventory it will open the add line item screen
- d) If no item of scanned barcode present in the product list\inventory, you will get the option to first add the product and then add it in your sales order

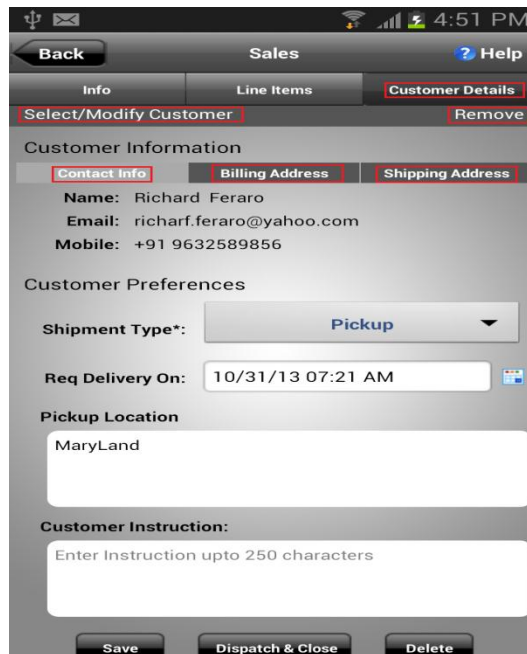
**Search:** You can search, filter and sort the line items of sales order.

- a) Click on the “Search” button
- b) Search bar will open
- c) Also you can Filter and Sort the line items by selecting “Filter” and “Sorting” links

5. Now, go to “Customer Details” tab

➤ **Customer Details Tab:** You can select, remove or modify customer with your Sales order from this tab.

- a) **Select\Modify Customer:** To map customer with your sales order:
  - i) Click on “Select Modify Customer” link
  - ii) This will open your customer list
  - iii) Select\Modify any customer and select radio button
  - iv) Click on “Select”
  - v) Customer will be mapped with your sales order

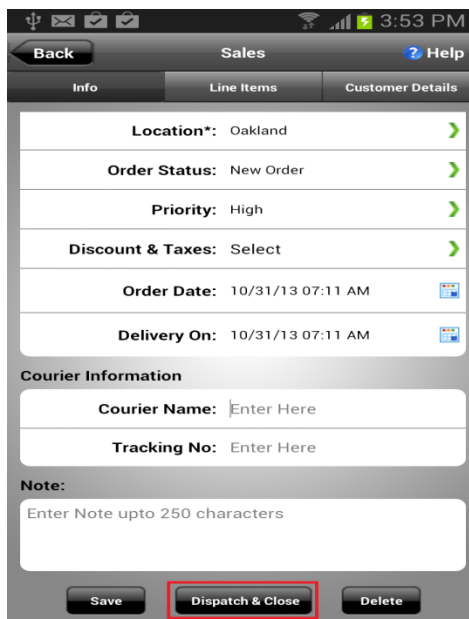


- b) **Remove Customer:** Click on the “Remove” button to remove the customer from your sales order
  - c) **Customer Information:** All the information of your selected customer will be displayed here such as
    - Contact info
    - Billing address
    - Shipping address
  - d) **Customer Preferences:** You can set customer preferences like:
    - Shipment Type (Delivery or Pickup)
    - Requested Delivery On
  - e) Delivery Location (depending upon shipment type)
  - f) Customer Instruction (if any)
6. Click on “Save” button to save your sales order

**Dispatch a Sales Order:** (Note\*: In this release, this feature is currently available only on web)

You can dispatch your sales order from “Info” or “Customer details” tab of sales order:

- 1. Click on “Sales Order” icon from dashboard
- 2. Select any order from “Sales Orders” list
- 3. Go to “Info”\Customer Details” tab
- 4. Displaying “Dispatch & Close” button at the bottom of the screen
- 5. Click on “Dispatch & Close” button, this will dispatch your full order including all your line item and close it
- 6. Your order will be fulfilled and sent to closed sales order

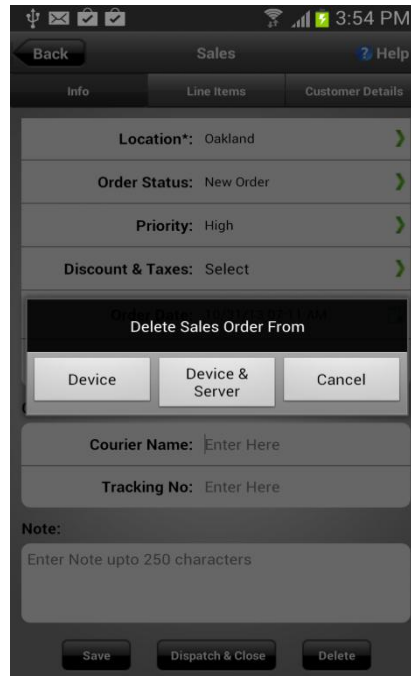
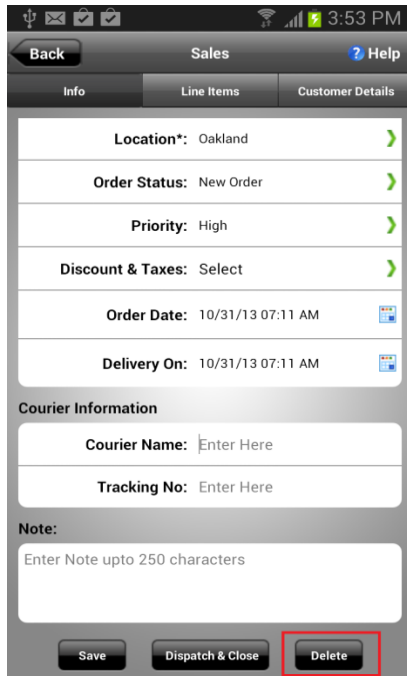


### *Update Sales Order:*

1. Select Sales order section from dashboard
2. On Sales Order list, select the order you want to update
3. Update details you want and click on “Save” button
4. Sales order will be updated

### *Deleting Sales Order:*

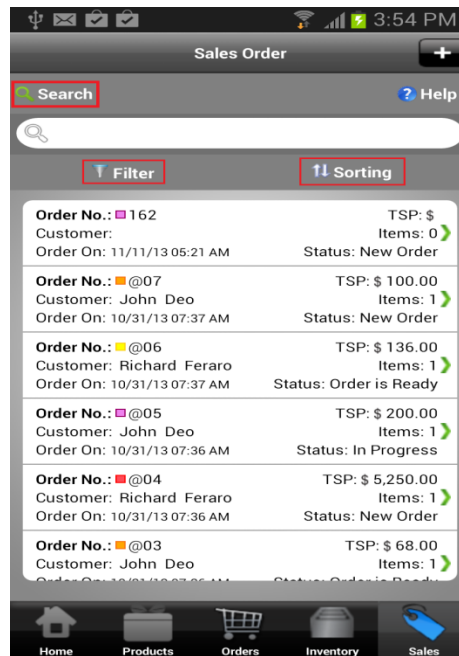
1. Select Sales order section from dashboard
2. On Sales Order list, select the order you want to delete
3. Click on the delete button
4. Sales Order will be deleted



(\*Note: Delete from “Device” will delete data only from your device & delete from “Device & server” will delete data from device as well as from web server)

*Search\Filter\Sorting:*

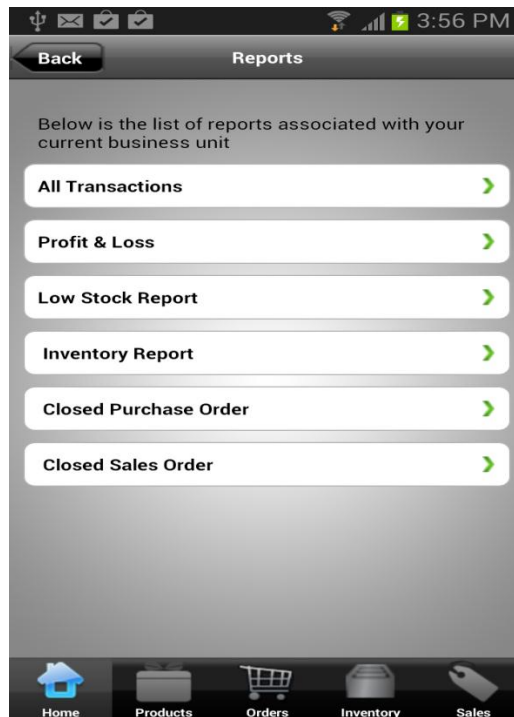
1. Select Sales order section from dashboard
2. Click on the “Search” provided on the top left corner of the screen
3. Search bar will open
4. Also you can Filter and Sort the Sales order by selecting “Filter” and “Sorting” links

[Go to Top](#)

## Reports

You can view and email all your Reports in this section. Following are the different reports:

1. All Transaction Report
2. Profit & Loss Report
3. Low Stock Report
4. Inventory Report
5. Closed Purchase Order Report
6. Closed Sales Order Report



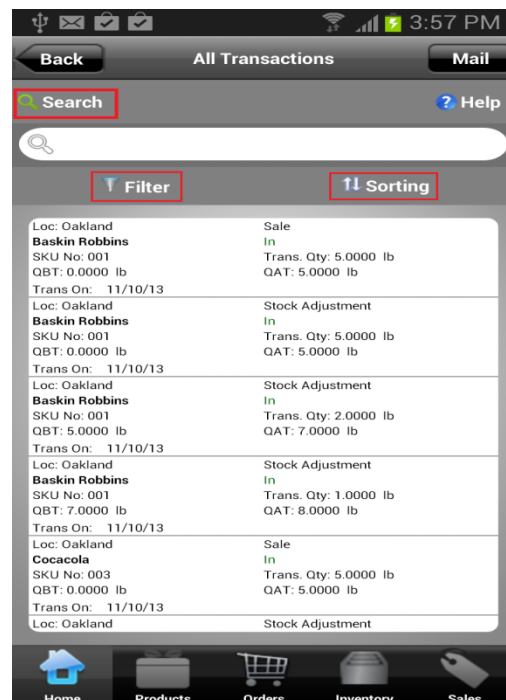
## All Transaction Report:

*This report contains the data of all the transaction of a product.*

**Mail:** This feature will be available in next version.

### Search\Filter\Sorting:

1. Click on the “Search” provided on the top left corner of the screen
2. Search bar will open
3. Also you can filter and sort the transactions by selecting “Filter” and “Sorting” buttons



## Profit & Loss Report:

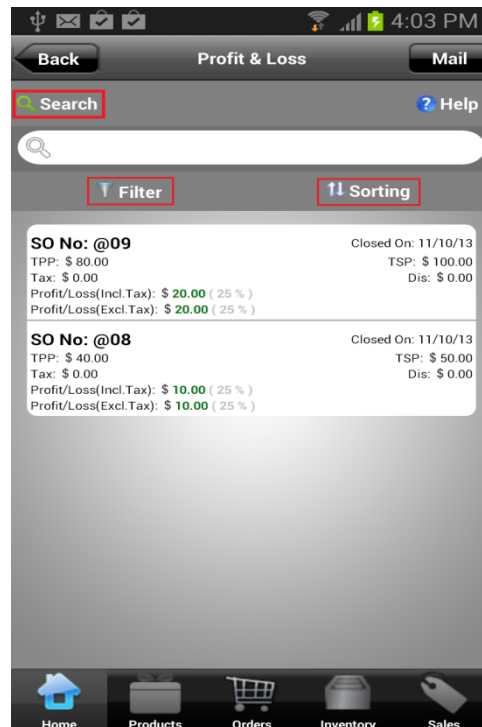
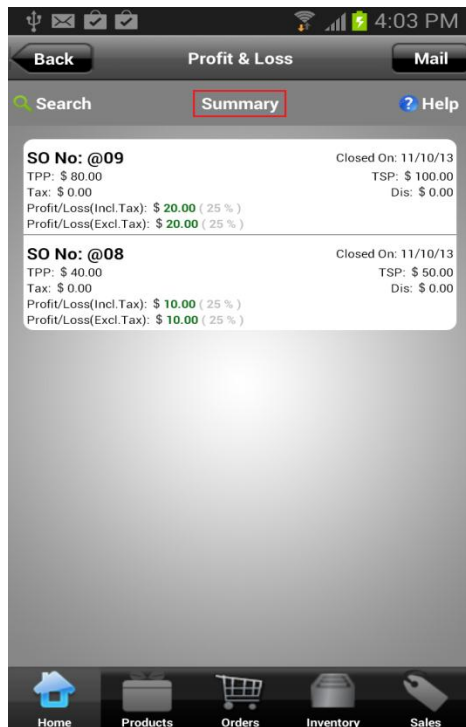
*This report provides you the “Sales Specific” Profit/Loss on your sales order.*

**Mail:** This feature will be available in next version.

**Summary:** This will provide you the information of all your profit and loss for the current business unit.

### Search\Filter\Sorting:

1. Click on the “Search” provided on the top left corner of the screen
2. Search bar will open
3. Also you can filter and sort the Profit & Loss by selecting “Filter” and “Sorting” buttons



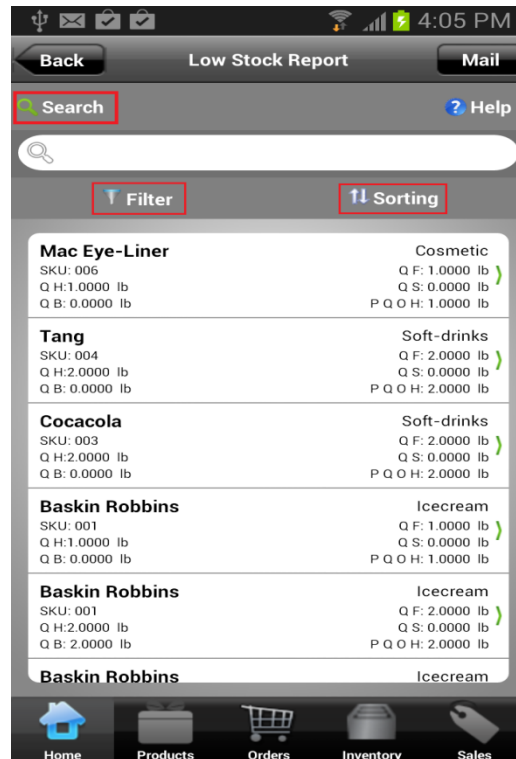
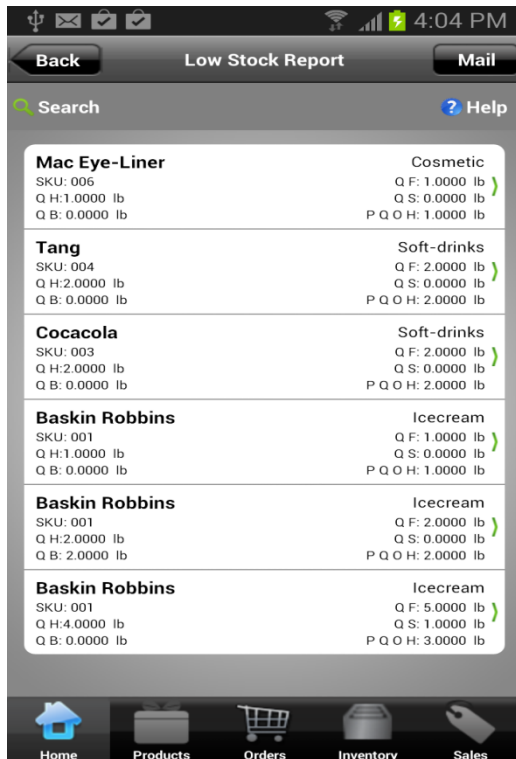
## Low Stock Report:

***This report contain all the inventory items, which are available in inventory below its "Minimum Quantity"***

**Mail:** This feature will be available in next version.

### Search\Filter\Sorting:

1. Click on the "Search" provided on the top left corner of the screen
2. Search bar will open
3. Also you can filter and sort the Low Stock by selecting "Filter" and "Sorting" links



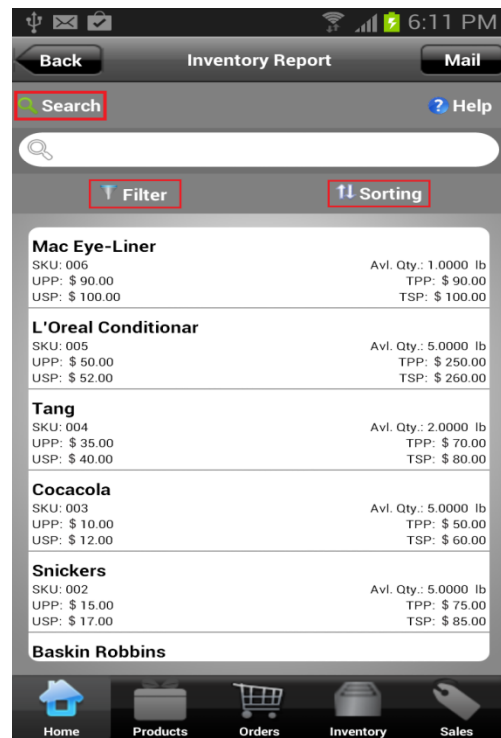
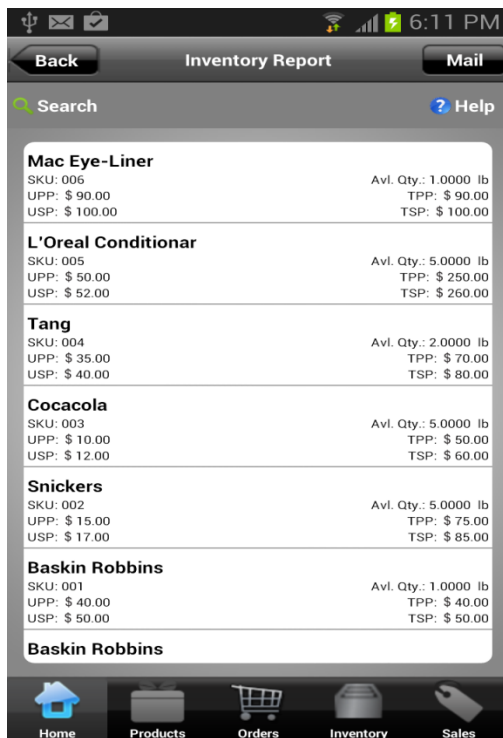
## Inventory Report:

*This report will display details of all the inventory items.*

**Mail:** This feature will be available in next version.

### Search\Filter\Sorting:

1. Click on the "Search" provided on the top left corner of the screen
2. Search bar will open
3. Also you can filter and sort the Inventory Report data by selecting "Filter" and "Sorting" buttons



## Closed Purchase Order Report:

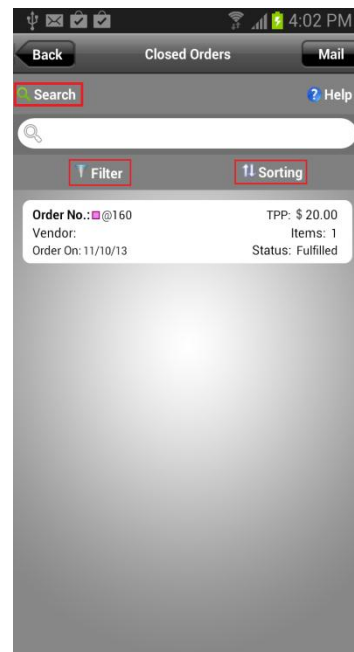
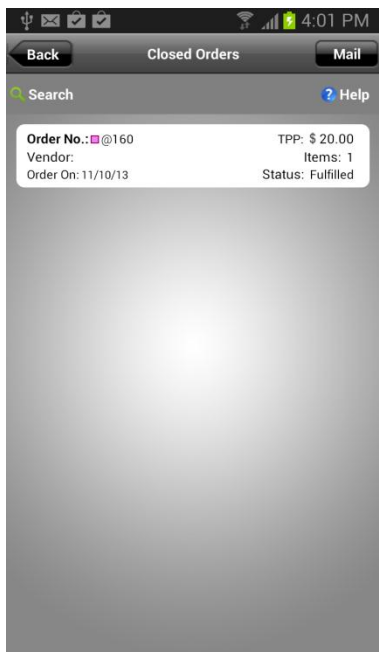
*This report contains the data of all the closed purchase order, whether it is closed fully or partially.*

**Mail:** This feature will be available in next version.

**View Closed Order Items:** Click on any “Closed Purchase Order” to view line items of that closed order

### Search\Filter\Sorting:

1. Click on the “Search” provided on the top left corner of the screen
2. Search bar will open
3. Also you can filter and sort the Close Purchase Order data by selecting “Filter” and “Sorting” buttons



## Closed Sales Order Report:

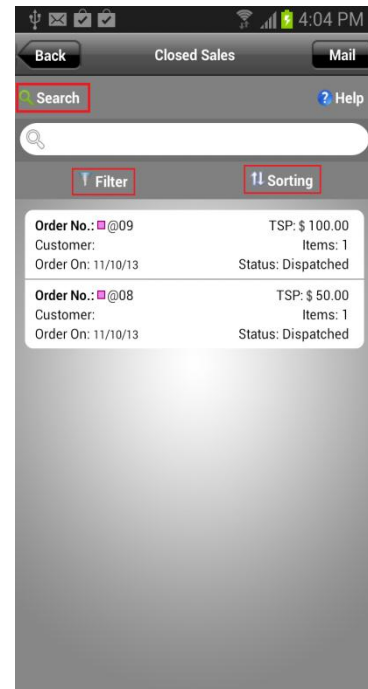
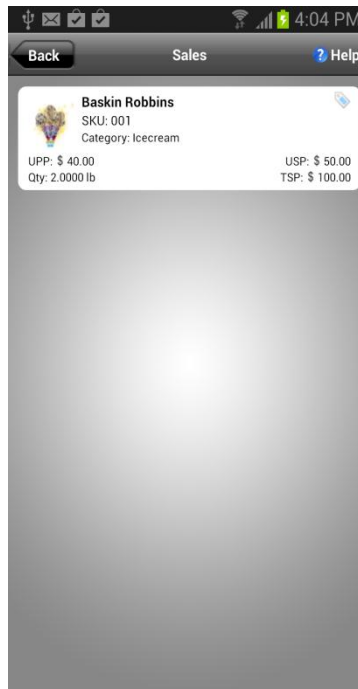
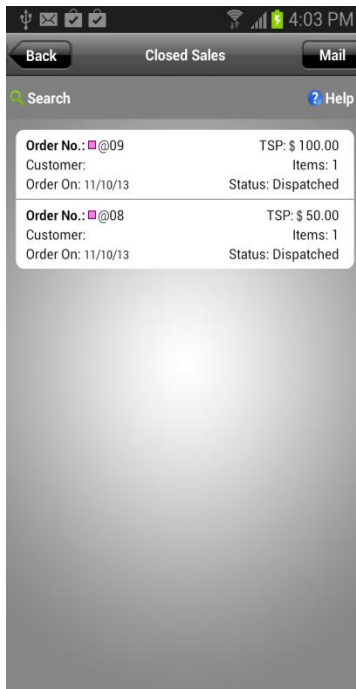
*This report contains the data of all the closed sales order.*

**Mail:** This feature will be available in next version.

**View Closed Sale Order Items:** Click on the “Closed Sale Order” to view line items of that closed sale order

### Search\Filter\Sorting:

1. Click on the “Search” provided on the top left corner of the screen
2. Search bar will open
3. Also you can filter and sort the Closed Sales order by selecting “Filter” and “Sorting” buttons



[Go to Top](#)

## Settings

You can change your settings from this section.

**Download Settings:** Click on this button if some of your settings not downloaded

### Organization:

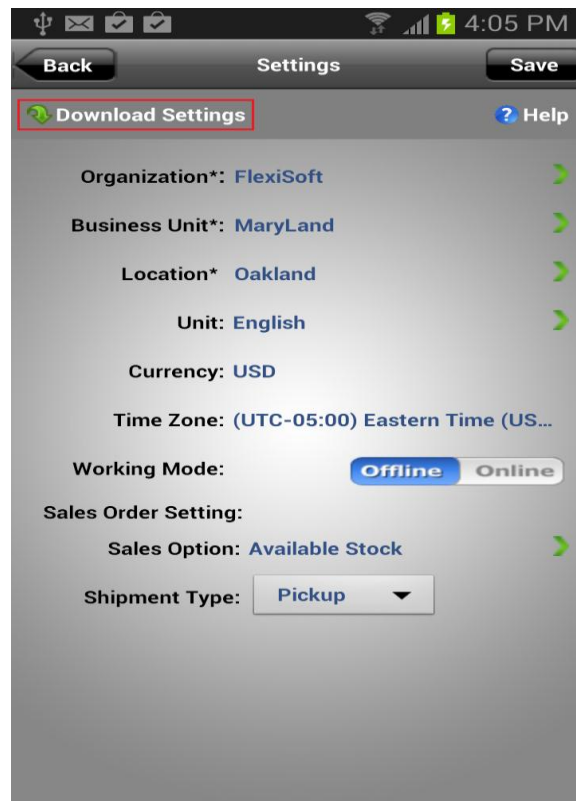
This section allows you to change your current organization

4. Click on "Organization"
5. Displayed all the associated organization of your account
6. Select the organization you want to work on

### Business Unit:

This section allows you to change your current business unit

4. Click on "Business Unit"
5. Displayed all the business units associated with the selected organization
6. Select the business unit you want to work on



***Location:***

List of all the location associated with the selected Business Unit displayed here. This section allows you to select any location as default location.

***Unit:***

Display Unit type which you selected on web for this user. You can change the default unit type.

1. Click on "Unit"
2. Displayed "Unit" screen
3. To change default unit, click on selected default unit
4. You will now redirected on "Unit List"
5. Select the default unit

***Currency:***

- Currency will be displayed as per selected business unit
- You can change the currency only from your "GOIS Pro web" account

***Time Zone:***

- Time Zone will be displayed as per the current user, which has been set on web.
- You can change the time-zone only from your "GOIS Pro web" account
- Follow below steps to change your time-zone:
  1. Login on your GOIS web account
  2. Go to "Profile"
  3. Change the Time-Zone
  4. Save the profile
  5. Open GOIS Pro app on you device
  6. Select "Sync" from your home screen
  7. Select Miscellaneous
  8. Download "User Profile"
  9. Your new time-zone will be downloaded

***Working Mode:***

You can choose from two different working modes:

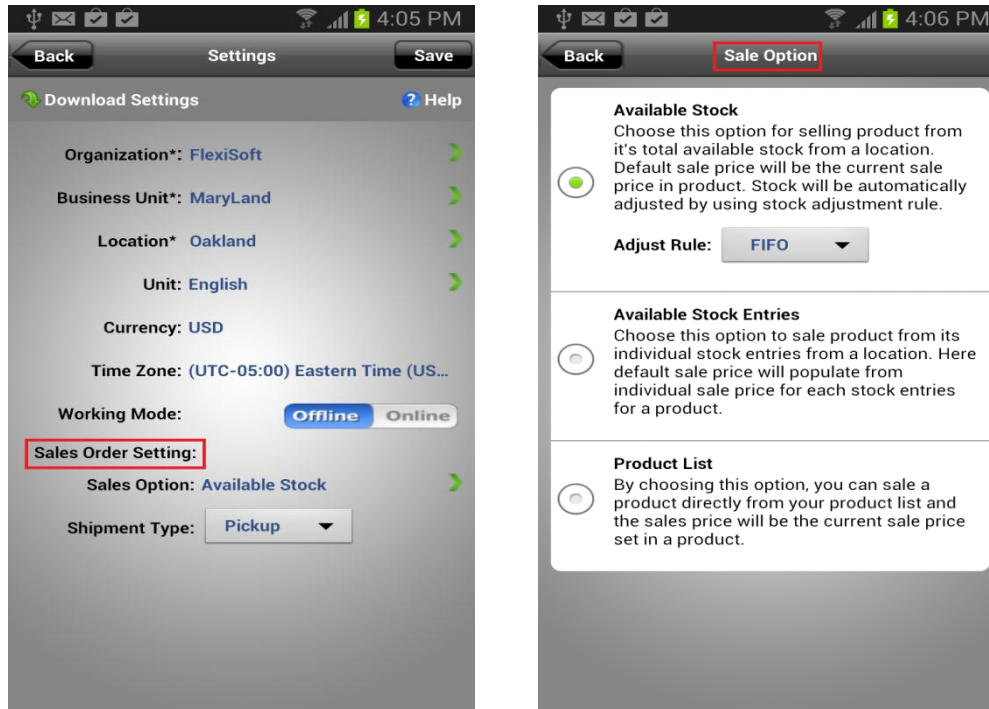
- Online: Synchronize all your data to web server on real time
- Offline: Create data on device only without synchronizing it to web

***Sales Order Settings:***

**Sale Option:** Select options for your sales orders:

- a) **Available Stock:** Select for selling product from its total stock from a location.

- Stock Adjustment Rule:
  - i) FIFO: Item which added in stock first will be used first for selling (First In First Out)
  - ii) LIFO: Item which added in stock last will be used first for selling (Last In First Out)



- b) **Available Stock Entries:** Choose this option to sales product from its individual stock entry from a location.
- c) **Product List:** Choose this option to sales directly from your product list. This will not affect your inventory.

**Shipment Type:** Select the shipment type of your sales order.

- Pickup
- Delivery

\*Click on “Save” button to save your settings

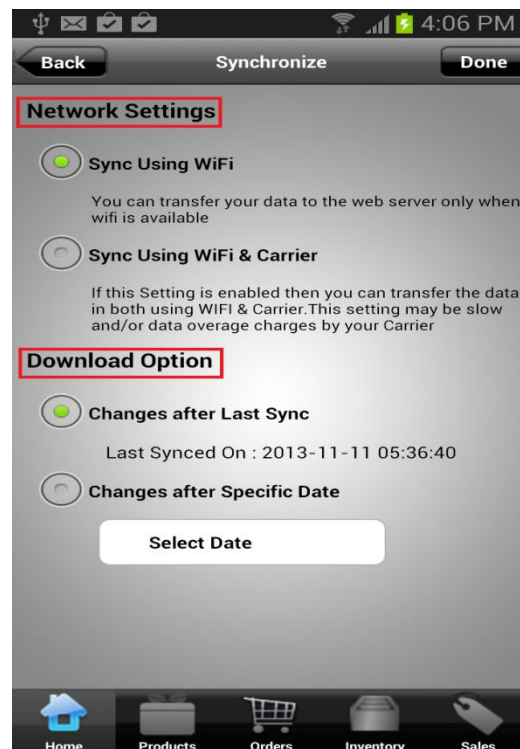
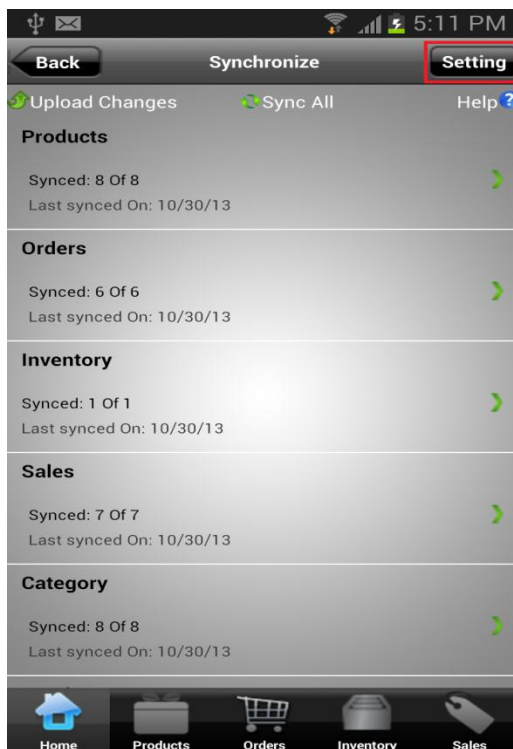
[Go to Top](#)

## Sync

This section gives you the facility to upload your data from your device to web server and download data from webserver on your device.

**“Setting”:** You can select your network and download settings from here:

1. Click on “Setting” button displaying on the top right corner of the synchronize screen
2. You can now choose your network settings for download\upload data



**Network Settings:** You can select any of the network setting:

- Sync Using WIFI only: You can transfer your GOIS data to the web server only when WIFI is available.
- Sync using WIFI and Carrier: You can transfer your GOIS data using both WIFI and Carrier.

**Download Options:** You can set the settings for your download. “Syn All” will work as per the download option selected:

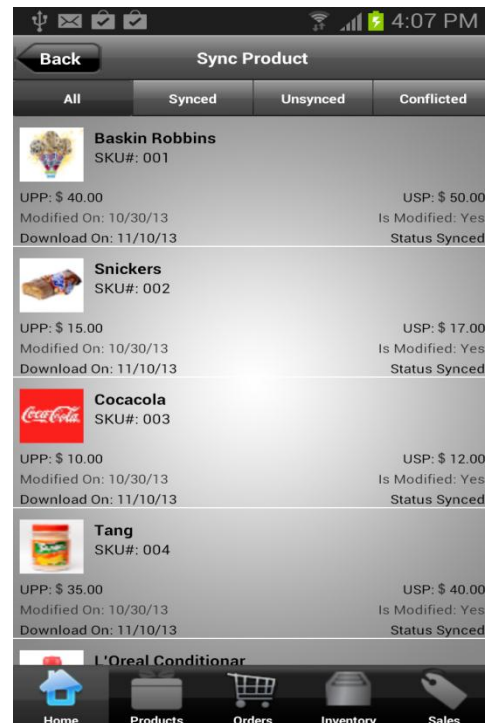
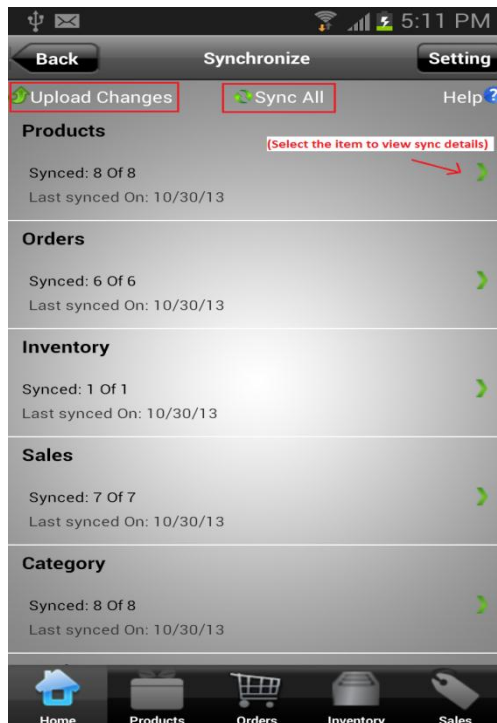
- Change after last sync: This setting will download all your data after the last synced date on your device.
- Changes after “Specific Date”: If you want to download data from a specific date select this option and set the date. This will download all your data after that specific date.

#### *“Sync All”:*

- You can download\upload all your data by just clicking on the “Sync All” button
- This will upload all the newly created device data to web
- This will download all newly created web data on the device
- In case of conflicted data, device data will be updated as per the server data

#### *“Upload”:*

- This will upload all your device modification to web server.
- In case of conflicted data, device data will be updated as per the server data



### *View Sync Details:*

- You can view details of all synced, un-synced, conflicted record of any entity
- Click on any of the entity (Products, Orders, Stock Entries, Sales, Category, Vendor, Customer)
- For example select “Products”. This will display details of all synced, un-synced, conflicted records.

[Go to Top](#)

## Utility

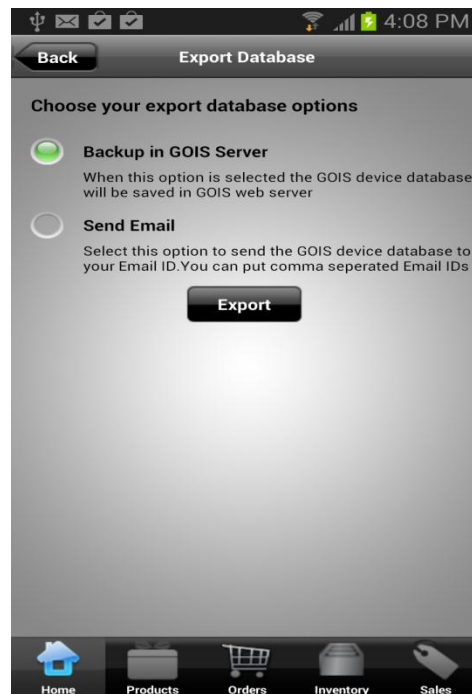
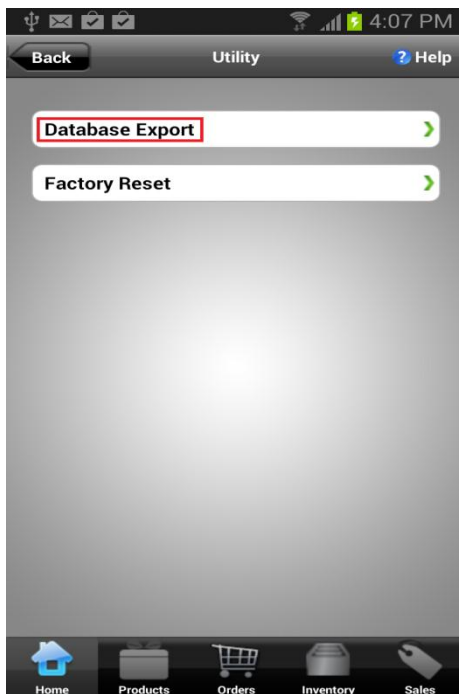
***GOIS Pro provides you the following Utilities:***

- Database Export
- Factory Reset

### **a) Database Export:**

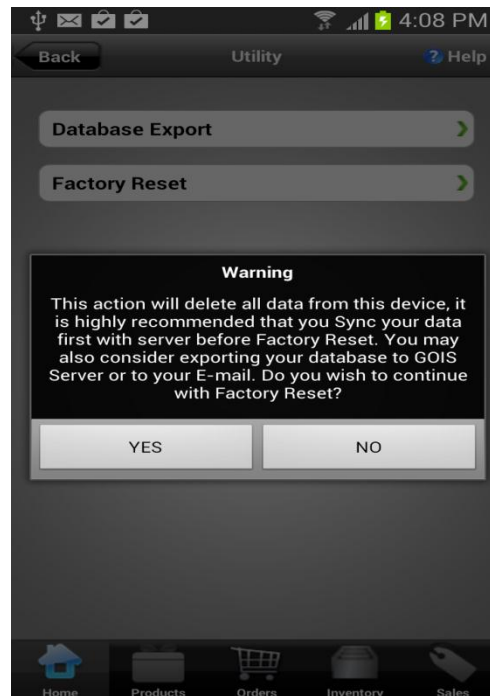
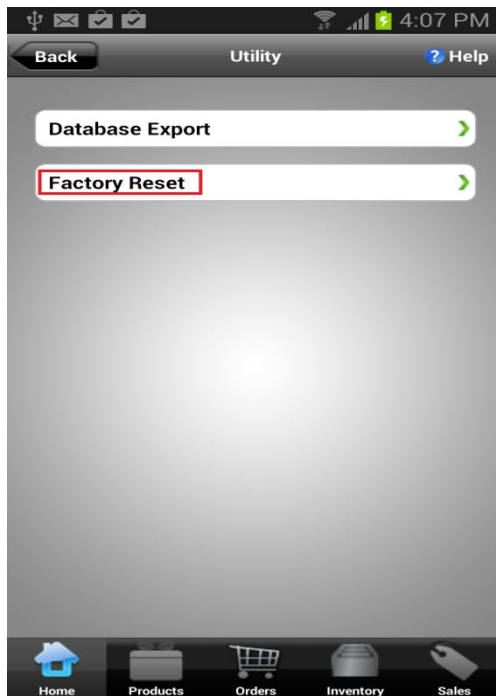
This utility allows you to export your device database.

1. Click on “Utility” icon from home screen
2. You can now see “Export Database” on utility screen
3. Click on “Export Database”
4. Export Database screen you will get two options for exporting your database
  - Backup in GOIS Server (To save data on webserver)
  - Send Email (To email database in email)
5. Click on “Export” button to export database



## b) Factory Reset:

1. This utility allows you to reset all your device data.
2. All your device data will be removed
3. Remember to sync all your important data before doing factory reset.

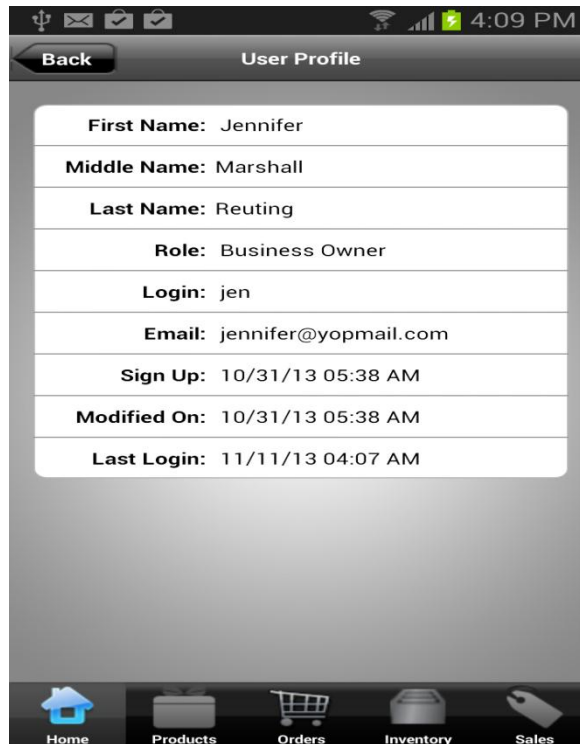


[Go to Top](#)

## User Profile

*This section allows you to view your profile details.*

- You can see the user profile information in this section
- If you want to update any other information, you have to login on GOIS web server
- If you have made any changes on GOIS web and unable to see it here you have go to “Sync” section and do “Sync All” or download “User Profile” from Miscellaneous



<b>First Name:</b>	Jennifer
<b>Middle Name:</b>	Marshall
<b>Last Name:</b>	Reuting
<b>Role:</b>	Business Owner
<b>Login:</b>	jen
<b>Email:</b>	jennifer@yopmail.com
<b>Sign Up:</b>	10/31/13 05:38 AM
<b>Modified On:</b>	10/31/13 05:38 AM
<b>Last Login:</b>	11/11/13 04:07 AM

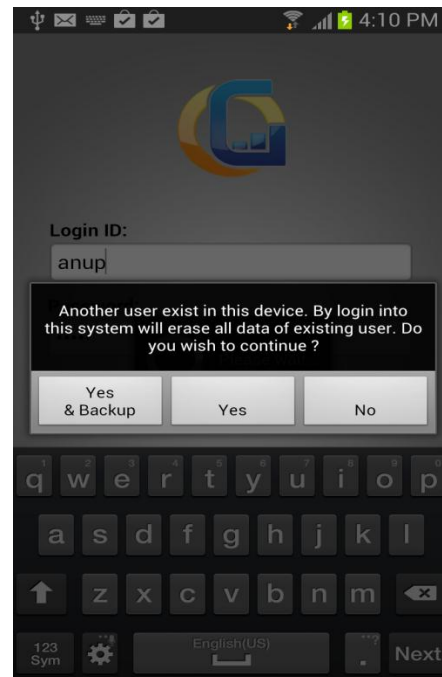
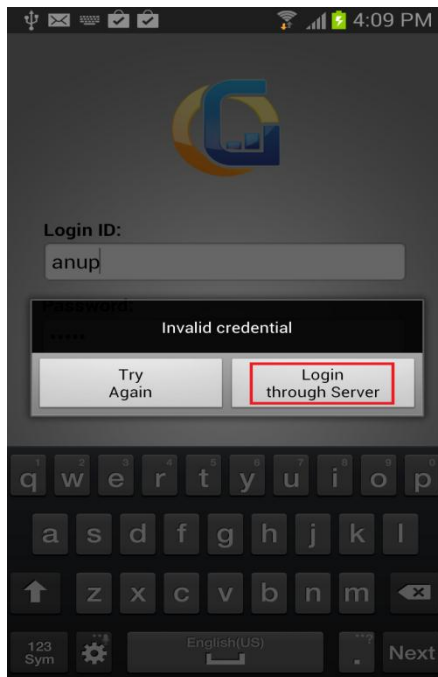
[Go to Top](#)

## Working with different User on same device

You can use the same device for login as a different user. Before changing the user it will ask you to take the backup of your data.

1. Open GOIS Pro app
2. If you are already logged it with any other user then logout
3. Now, enter any other registered login ID
4. You will see an error message
5. Select "Server Login" (This will allow you to login with another user)
6. It will now ask you whether to take back up of your previously used user.
7. You will get the following options:
  - Yes: This will not sync any of your previous data to web and login with the new user
  - Yes & Backup: This will first sync all your device data to web and then login with new user

(\*Note: We recommend you to select "Yes & Backup")



[Go to Top](#)