Goods Order Inventory-Pro

User Manual- Device

Updated on: 7th Jan 2016

Table of Contents

Account Activation Process 8
User Registration 8
Confirmation e-mail 9
User Activation: 10
Pricing & License 10
Account Setup 13
Default Setup 14
Custom Setup 14
General Settings: 14
Date & Time Format Settings: 16
Purchase Order Settings: 16
Sales Order Settings: 18
Product & Category Settings: 20
Login on Device 22
Password Recovery 22
Account Administration Settings on Device 23
Default Setup 23
Custom Setup 23
Download Settings: 23
General Settings: 23
Working Mode: 24
Sales Order Settings: 24
Home Screen 26
Manage 27
Category 27
Add Category: 27
Update Category: 28
Delete Category: 28
Searching/ Sorting: 29

Vendor 30
Add Vendor: 31
Update Vendor: 31
Delete Vendor: 31
Searching/ Sorting: 32
Customer 34
Add Customer: 34
Update Customer: 35
Delete Customer: 35
Searching/ Sorting: 36
Product 37
Add Product 37
Update/Edit Product 39
Delete Product 39
Product Sorting/Searching 41
Purchase Orders 42
Add Purchase Order 42
Info Tab 42
Line Items 43
Update/Edit Purchase Order 44
Fulfill Purchase Order 44
Fulfill All 45
Partial/Fully Fulfill: 45
Delete Purchase Order: 46
Purchase Order Sorting 47
Inventory 49
Available Stock 49
Add Items in Stock: 49
View Stock Transaction: 50
Search/Filter/Sorting 51
Available Stock Entries 52
View Stock Entries: 52

Add Items in Stock Inventory: 53
Update Items in Stock Inventory: 53
Delete Items in Stock Inventory: 54
Search/Filter/Sorting 55
Add Stock 56
Receive Delivery 57
Transfer Stock 57
Adjust Stock 58
Sales Order 61
Add Sales Order 61
Info Tab: 61
Line Items 62
Customer Details 63
Dispatch Sales Order: 64
Update Sales Order: 65
Delete Sales Order: 65
Search/Filter/Sorting 66
Quick Sales 68
Create Quick Sale 68
Quick Sale Screenshots 70
Reports 71
All Transactions 72
Mail: 72
Search/Filter/Sorting: 72
Closed Purchase Order 73
Mail: 73
View Closed Order Items: 73
Search/Filter/Sorting: 73
Profit & Loss 74
Mail: 74
Summary: 75
Tap on ‘Summary’ to check total direct sale and total sale using inventory. 75

Search/Filter/Sorting: 75
Closed Sales Order 75
Mail: 75
View Sales Order Items: 75
Search/Filter/Sorting: 76
Low Stock Report 77
Mail: 77
Search/Filter/Sorting: 77
Inventory Report 77
Mail: 77
Search/Location Filter/Sorting: 78
Quick Scan 79
Quick Action 79
Adjust Stock 79
Transfer Stock 82
Add Stock 84
Add Purchase Order 86
Add Sales Order 87
Quick Scan Web 89
View Detail 90
Product 90
Location 90
Sales Order 90
Purchase Order 90
Available Unit 91
View Detail-Screenshots 91
Quick Actions 93
Adjust Stock 93
Transfer/Import Stock 95
View Product Details 96
Settings 97
Download Settings 97

General Settings 97
Organization: 97
Business Unit: 97
Location: 97
Unit: 97
Currency: 97
Time-Zone: 98
Working Mode: 98
Sales Order Settings: 98
Sync 100
Settings 100
Network Settings: 100
Download Options: 100
Sync All 101
Upload 101
Utility 103
Export Database 103
Factory Reset 104
User Profile 106
Single Platform for Multiple Users 107
Support 109
Contact US 110

Introduction

This user manual is designed by MetaOption LLC to give a brief account on GOIS-Pro. This guide is intended to provide information related to account setup & its management, subscription plans, and technical support on android/iOS platform offered by MetaOption LLC to its clients.

'Goods Order Inventory System' (GOIS) Pro is a highly sophisticated Web & Mobile application designed specifically to address the inventory management needs of SME moving up on the growth curve.

For more information on GOIS-Pro, please visit our web-site

https://www.goodsorderinventory.com

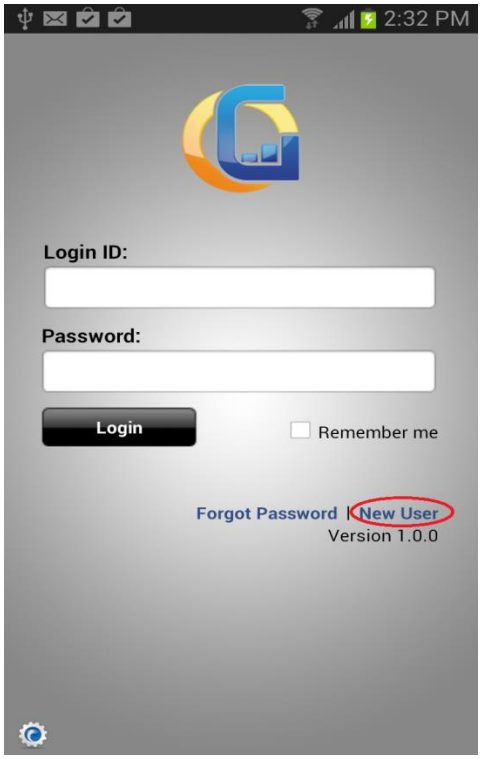
Account Activation Process

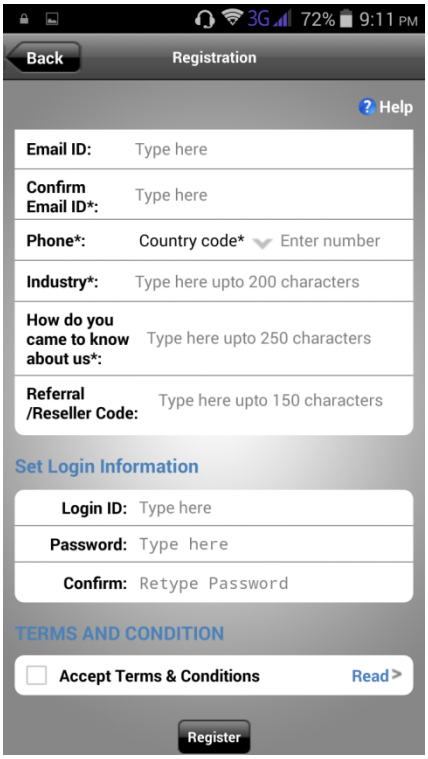
Manage your business inventory over cloud using Goods Order Inventory System – PRO mobile app.

User Registration

1. Download Goods Order Inventory System – PRO app from respective app store for Android and iOS devices.
2. Open GOIS-PRO mobile application on your device.
3. Click on *'New User'* given at bottom right corner of the screen.
4. Fill in the registration form with all necessary details and register.

Figure 1: User Registration Page-Device app

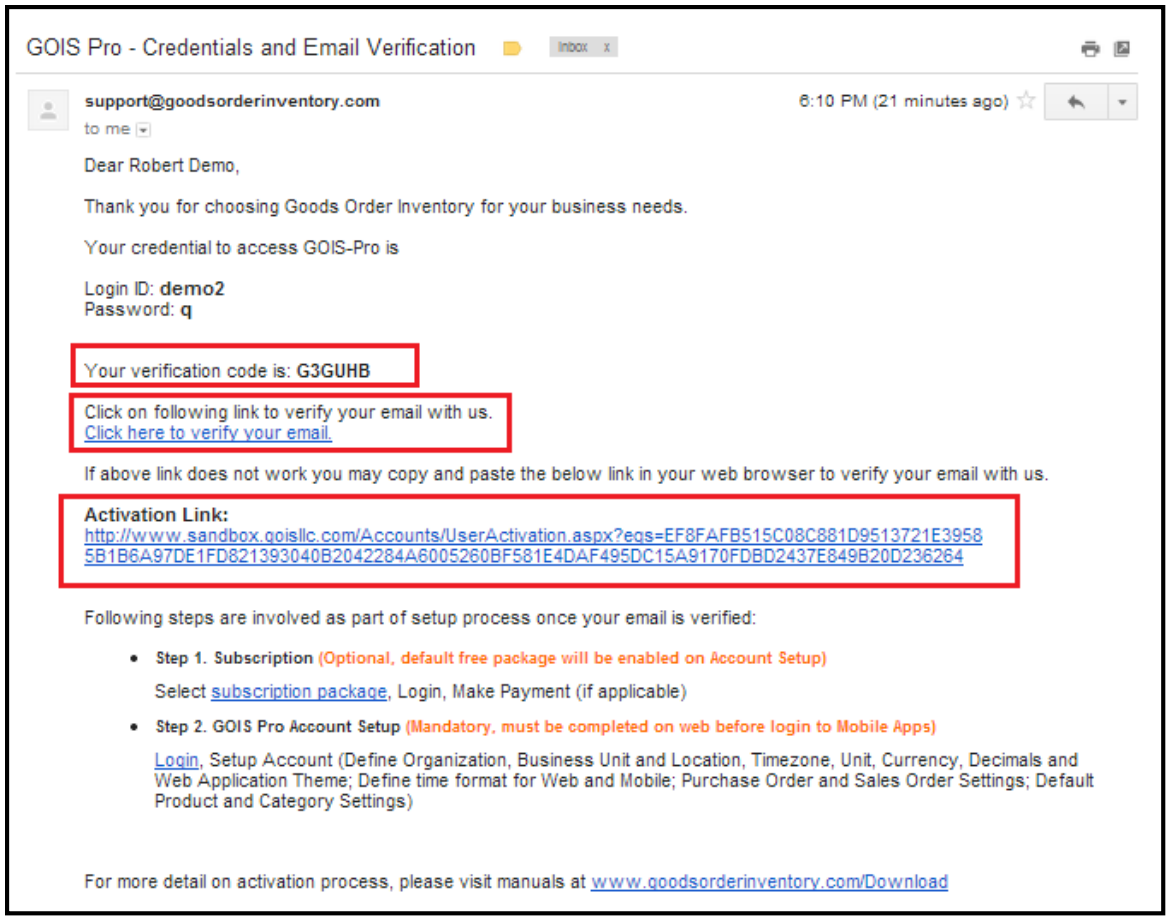




Confirmation e-mail

- An acknowledgement email along with activation link and login credentials will be sent to the user's registered email.

Figure 2: Account Confirmation Page



GOIS Pro - Credentials and Email Verification

Inbox x

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

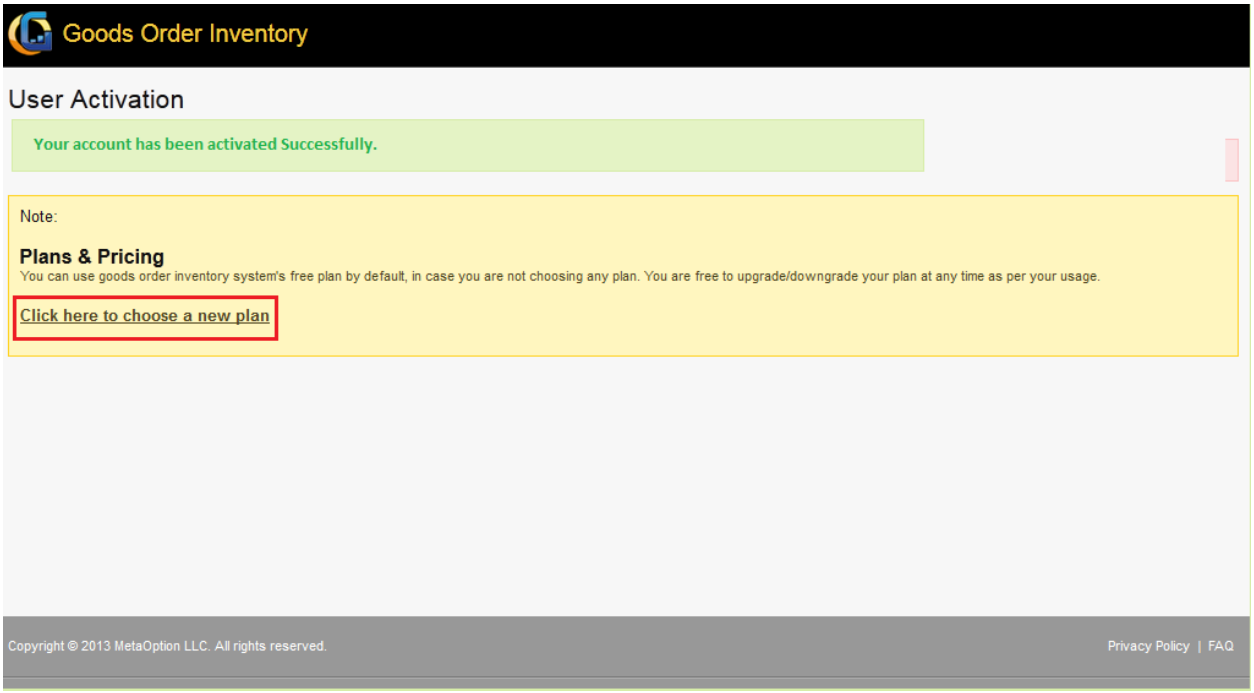
- Click on the account activation link to activate your account.
- After successful activation of your GOIS-PRO account, you need to login either into the web application or on the mobile application to setup your account (one time process).

! Check your spam/junk folder in case you didn't received mail in inbox.

User Activation:

- After successful account activation, user will be associated with free plan (by default).
- As per the individual's business requirement, you are given an option to subscribe for paid service as well, under *Pricing & License.*

Figure 3: User Activation Page



Pricing & License

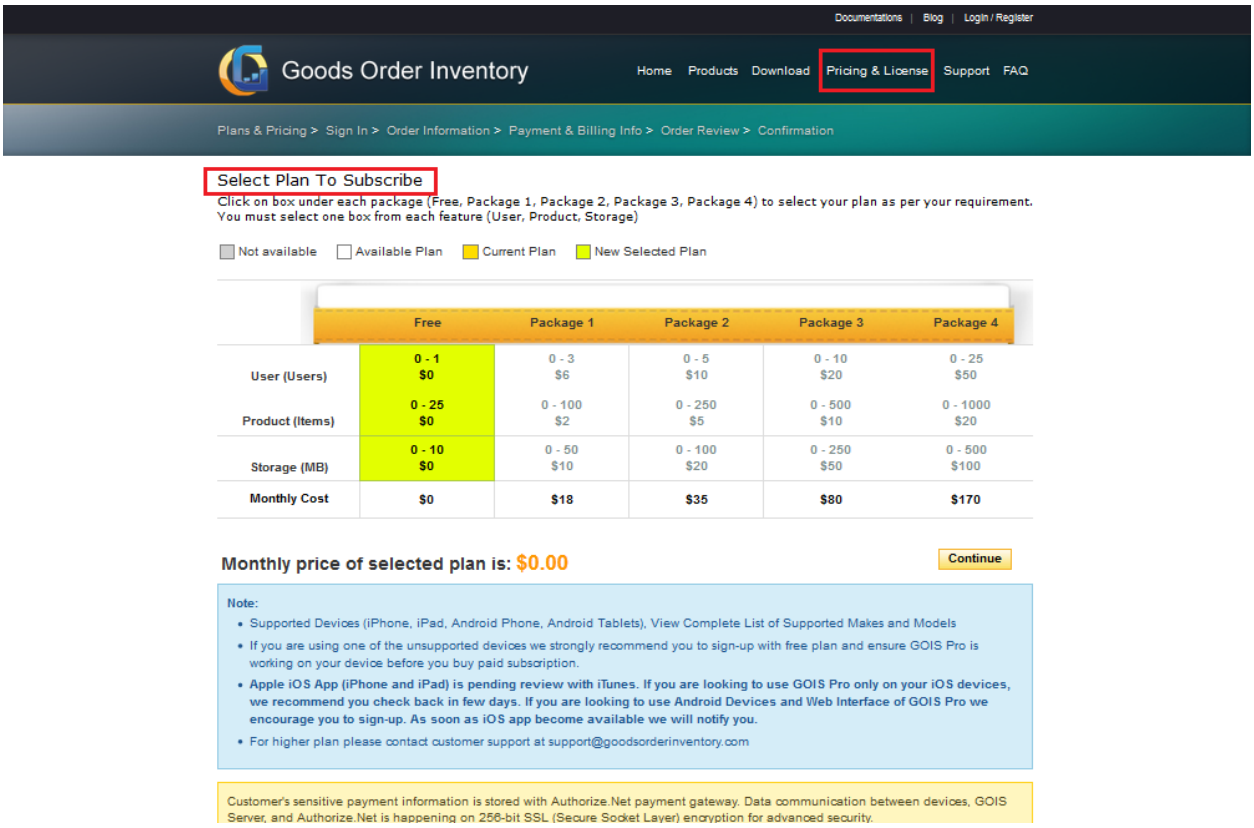
As per your business requirement, choose the best suited inventory plans from the list of available plans.

1. Click on the link *Pricing & License.*
2. Choose the desired plan from the list of available options of GOIS-PRO plans and go ahead with continue button.

! Supported platforms (iPad, iPhone, Android Smartphones, Tablets, Web)

! Contact GOIS Support to know more about Pricing & Licensing or to customize your large plans having more business requirement/limits.

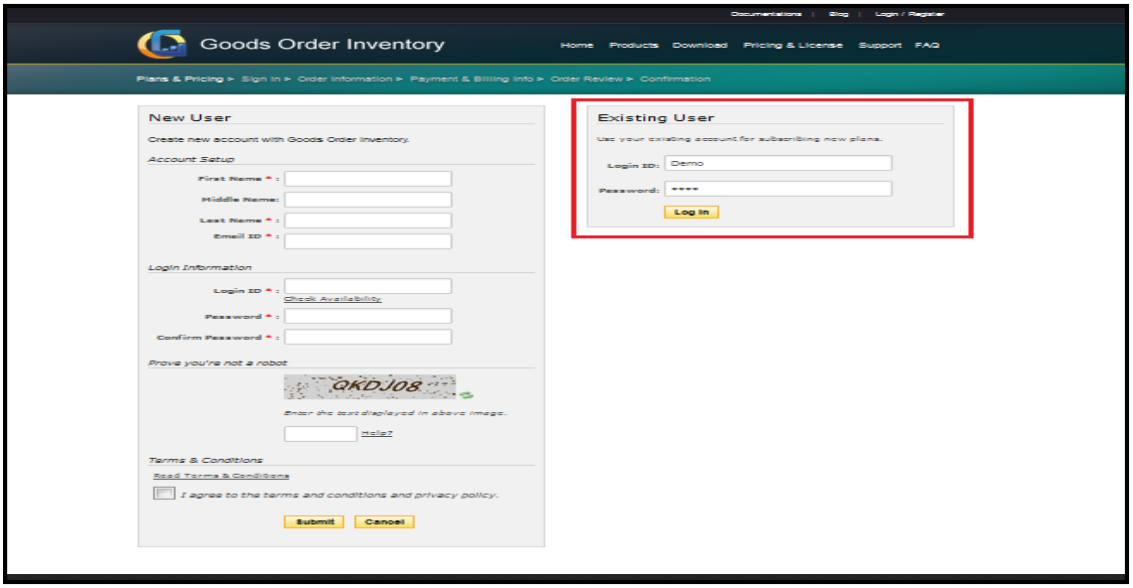
Figure 4: Pricing & License Page



3. You will be redirected to '*Login Screen';* after clicking on 'Continue'.

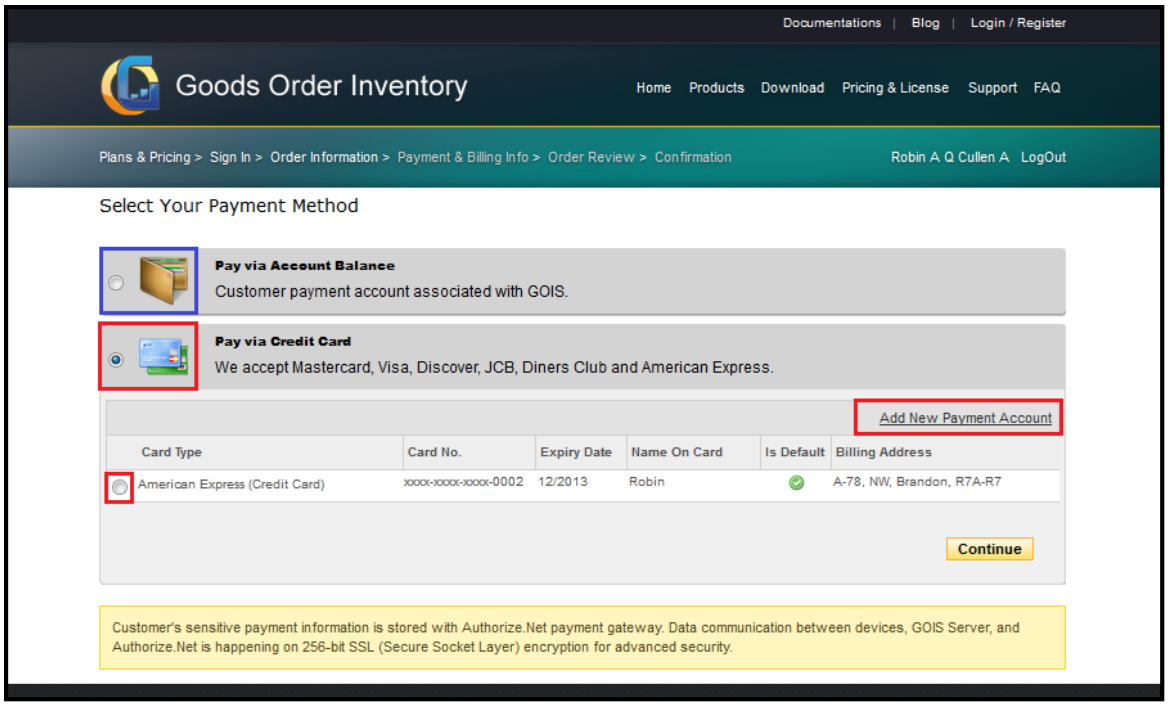
4. Login with your credentials under '*Existing User (Business Owner)'* section.

Figure 5: Registration Page



5. Choose preferred mode of payment as directed in screen. For payment mode as credit card, user needs to add the credit card information by clicking on “Add New Payment Account”.

Figure 6: Payment Method Page



6. After desired selection of payment option, you may go ahead by clicking on “Continue” button. Now user will be redirected to order confirmation page. After reviewing of order, user needs to click on “Confirm & Place Order” to make the final payment.
7. An ‘Order Confirmation screen’, stating the transaction number of payment will be given to the user for future reference with an order status.
8. An order confirmation mail will be sent to user’s registered e-mail as an acknowledgement.

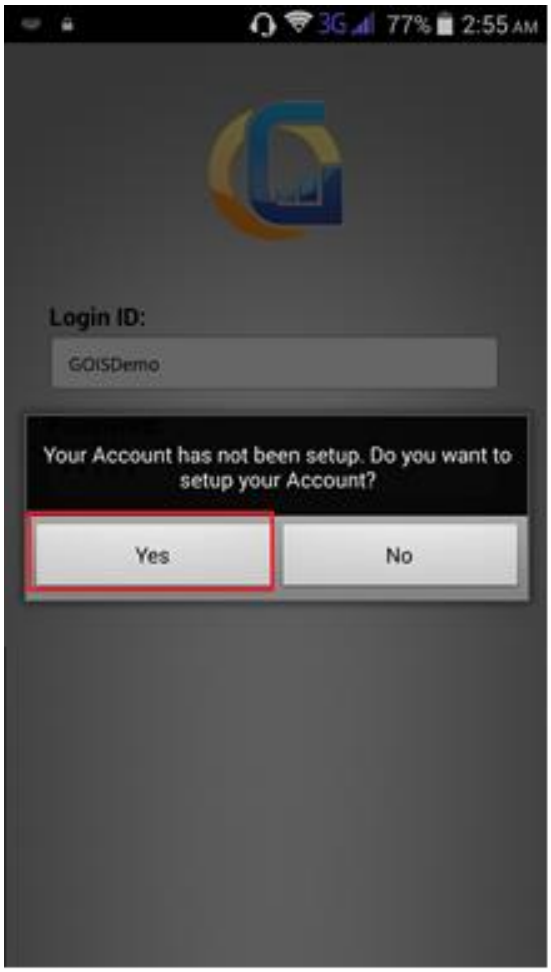
! A user can use/login GOIS-Pro android or iOS device app after completing the account activation pro

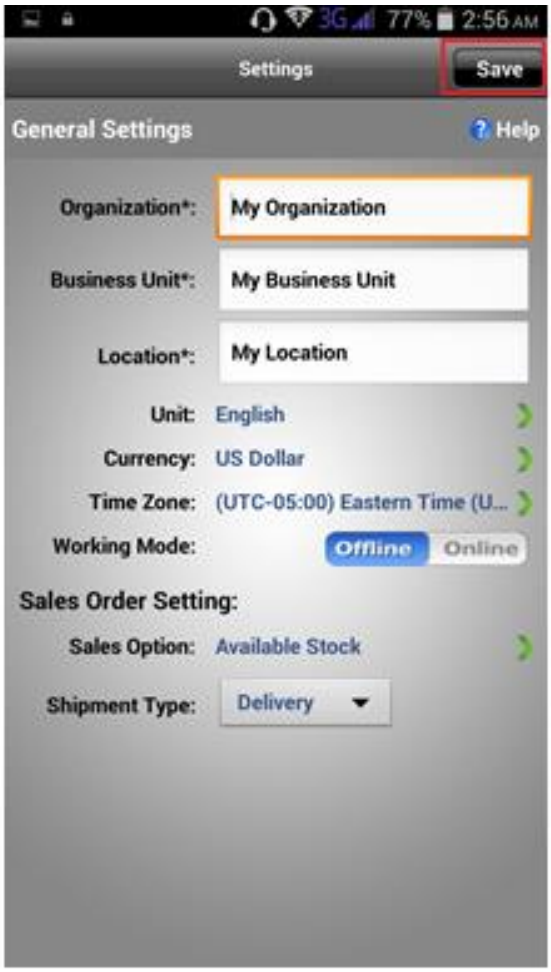
cess on web.

Account Setup

You will be redirected to 'Initial Account *Setup Process'* after signing in for the first time to your GOIS-Pro account (either from web or from mobile app).

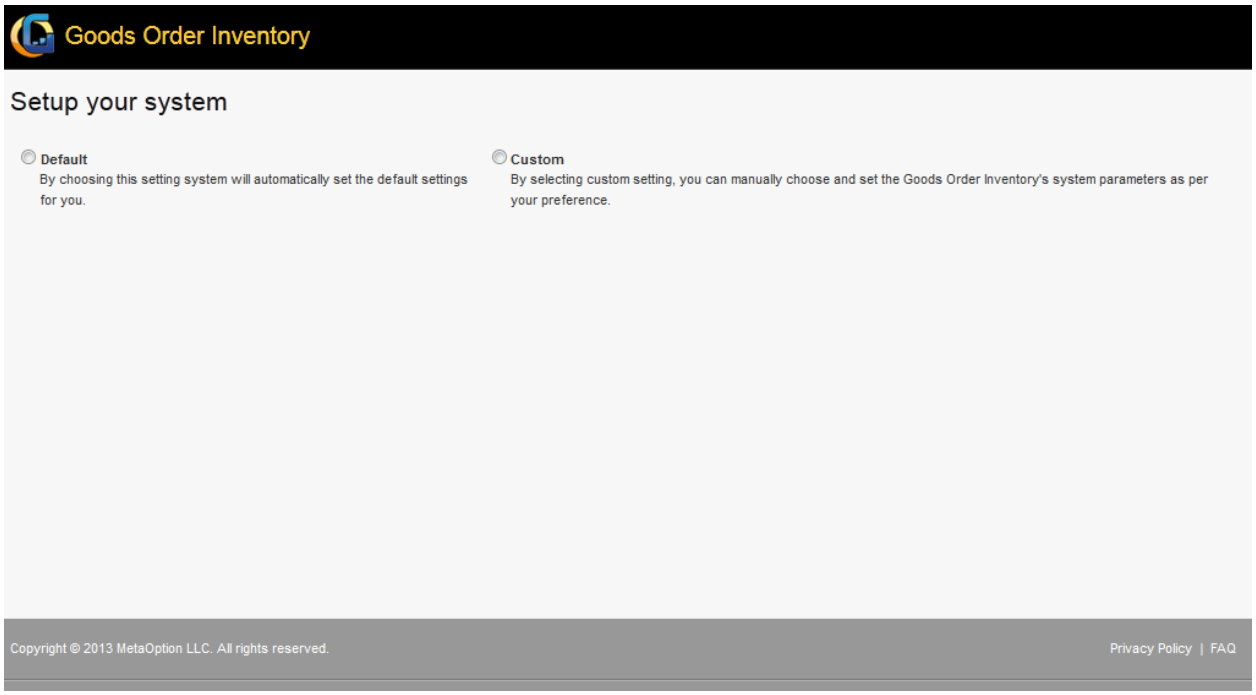
Initial Setup Screen – Mobile App





- Based on your business preferences, manage your account settings either with Default or custom interface.

Figure 7: Setup your system (Web interface)



Default Setup

Default settings will allow system to automatically initialize all the system variables against factory settings (default settings) without any user intervention. This prebuilt system offers client the standard specifications to suite the business requirement.

Custom Setup

Other option allows you to customize your desired system settings as per as your business requirements.

Manually set the parameters for Goods Order's inventory system as per business requirements. Fill all the required fields' details to create a user centric business system.

Lists of classified tabs are provided to help user fill the data in systematic manner.

General Settings:

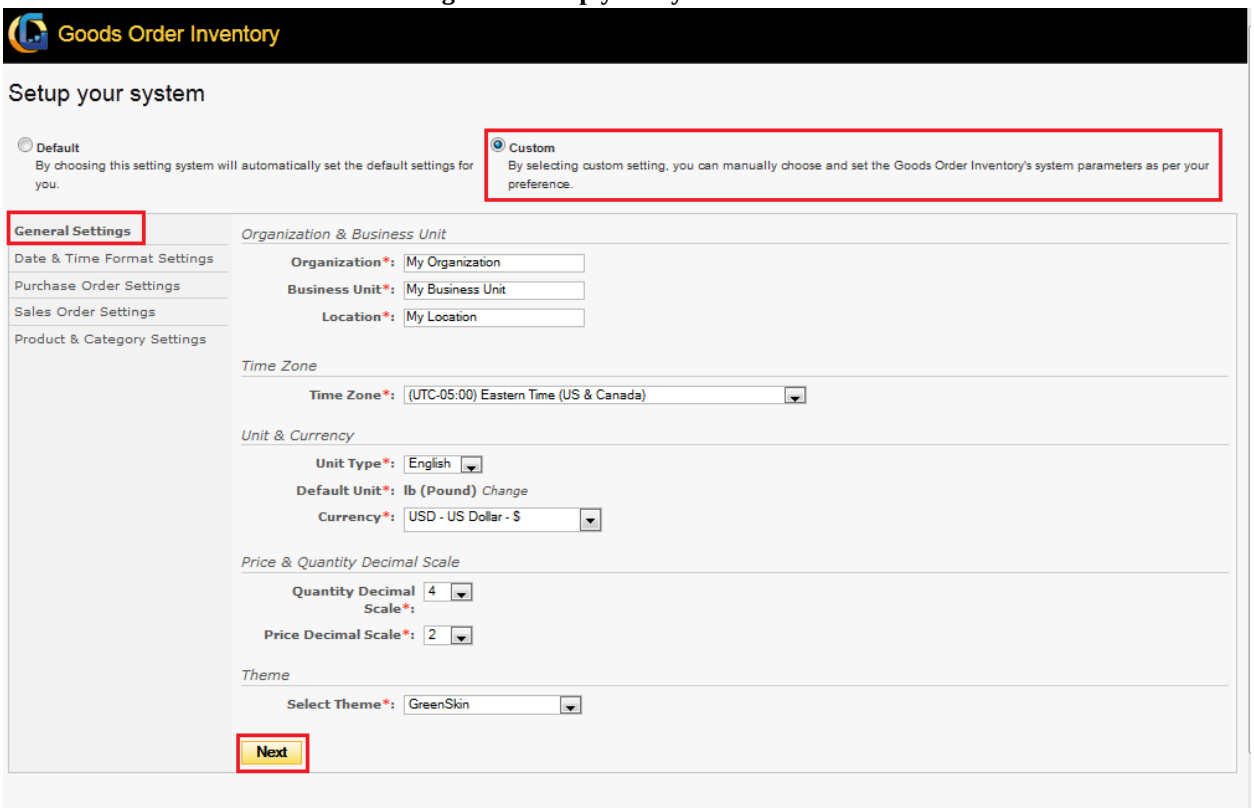
This tab is meant to provide general information pertaining to organization and other geographical information related to client's site.

1. Organization**:** Provide information related to your organization name in this field.
2. Business Unit**:** Fill this space with your default business unit within the default organization name.

3. Location**:** Provide information about your inventory system and warehouse location under this tab.
4. Time Zone: Set the time zone as per your business location.
5. Unit Type: Set the standard measurement unit type. User will be given an option to choose either 'English' or 'Metric' as the default measurement unit type.
6. Default Unit: This option will allow user to select the desired default unit on the basis of unit type being chosen by user.
7. Currency: Manage your organization currency under this tab.
8. Quantity Decimal Scale: It represents the decimal digits of a quantity. For example: 10.09 liters. Here the decimal number is .09. So the quantity decimal scale is 2.
9. Price Decimal Scale: It represents the decimal digits of a product price. For example, a good costs $ 30.06. So here, the price decimal scale is 2.
10. Select Theme: Select and choose desired color theme for your GOIS account.

Refer figure 8 for in-depth understanding of General settings.

Figure 8: Setup your system-Custom



! Required fields marked with an asterisk (*) must be complete in order to proceed for next step.

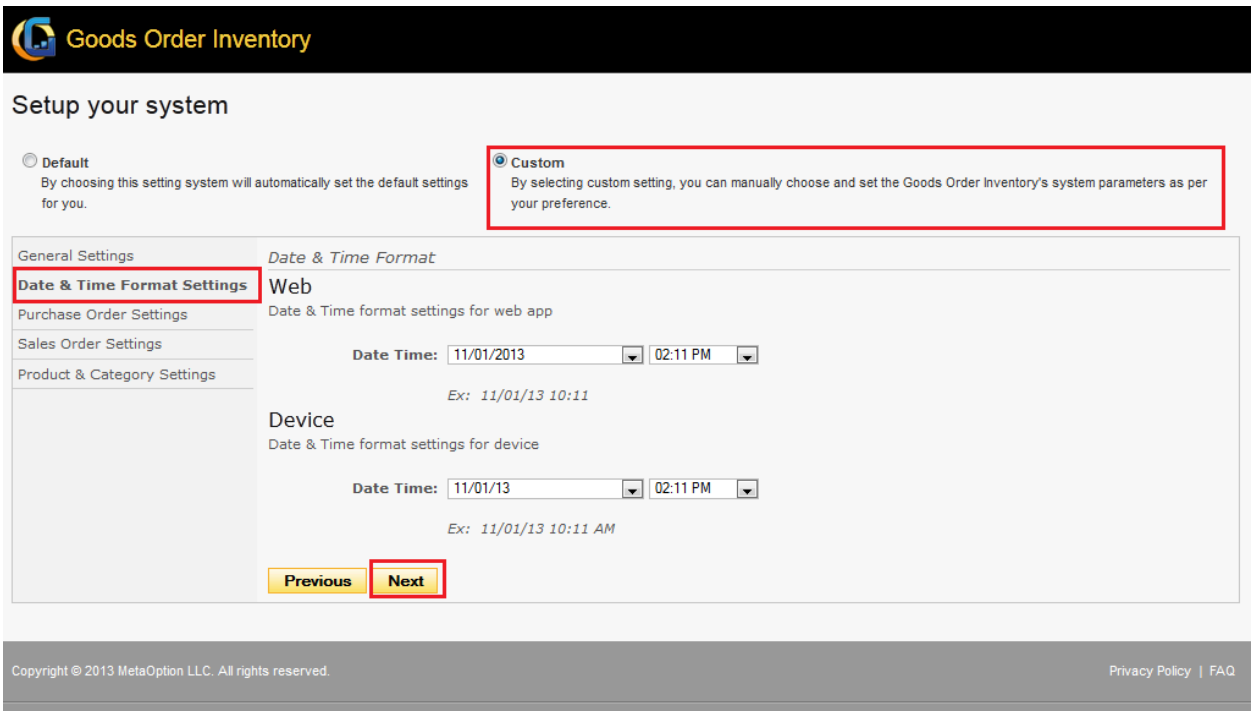
Date & Time Format Settings:

This tab is meant to set the date and time settings on the basis of locations where warehouse and inventory are maintained.

1. Web Date & Time Format: Set date and time format for your web applications under GOIS-Pro account.
2. Device Date & Time Format: Set the default date and time format for your device app.

Click on 'Next' to move to next tab *'Purchase Order Settings*' after completing all the details related to general settings.

Figure 9: Setup your system Page-Date & Time Format Settings



Purchase Order Settings:

Purchase order settings allows user to define their desired purchase order number format for their business by providing the necessary information.

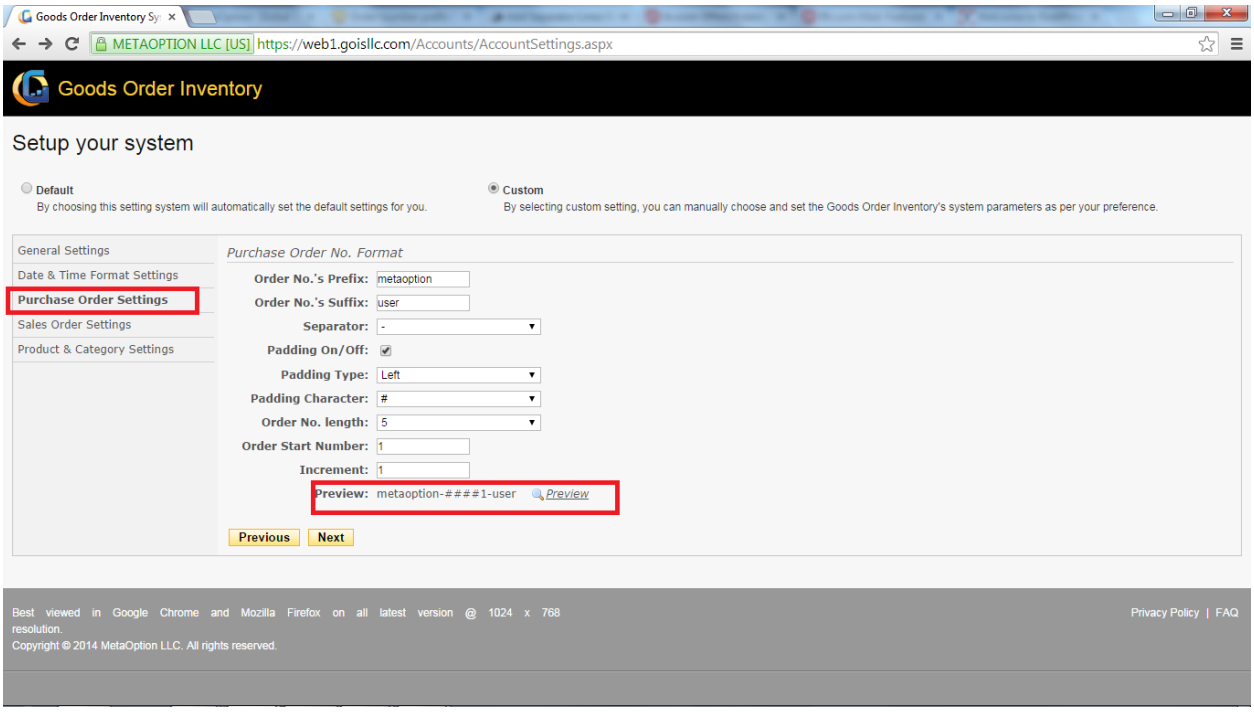
1. Order No's Prefix: Insert prefix before purchase order number so as to comply with standard business series for all the purchase orders.
2. Order No's Suffix: Insert letter or digits as suffix after purchase order number so as to comply with purchase order number.
3. Separator: Add separator lines between prefix, purchase order number, and suffix. Separator helps user in identifying important orders from the list of purchase orders.

4. Padding On/Off: This tab is meant to provide padding character to maintain your inventory in an efficient manner. Choose ‘Left’ or ‘Right’ as paddling type by adjusting your padding settings.
5. Padding Character: Select padding character from drop down box. Choose ‘0’ as default character or any other special character mentioned in drop box as per your inventory needs.
6. Order No. Length: Set standard length ranging from 3 digit numbers to 20 digit numbers for your purchase order number.
7. Order Start Number: Insert numerical digits to set a standard purchase order number series.

! Order number digits cannot exceed order number Length.

8. Increment: Set incremental series for your purchase order number.

Figure 10: Setup your system Page-Purchase & Order Settings



Click on the ‘Next’ to proceed further to ‘Sales Order Settings’.

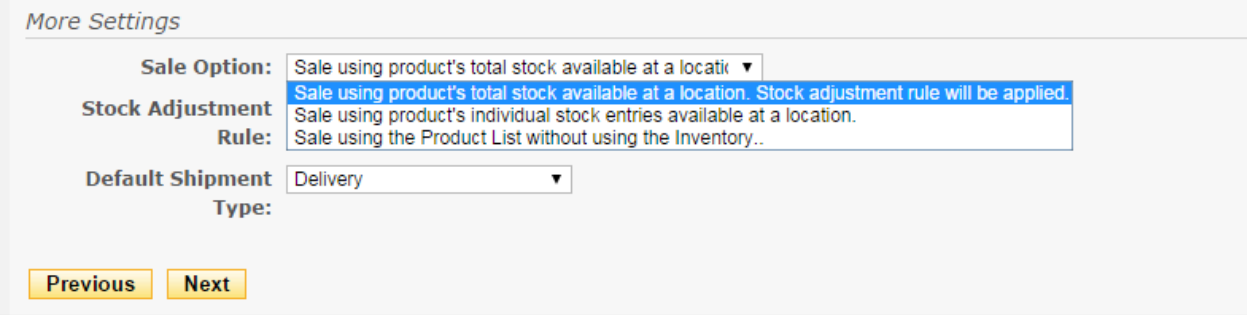
! Data once saved in Purchase order settings can be modified later or preview your purchase order information before moving to next tab.

Sales Order Settings:

Set customized rules for stock adjustment and goods shipment management. Under this link, a user has to fill all the information related to goods sale.

1. Sale Option: Select the best sales option which suites your business inventory requirements.

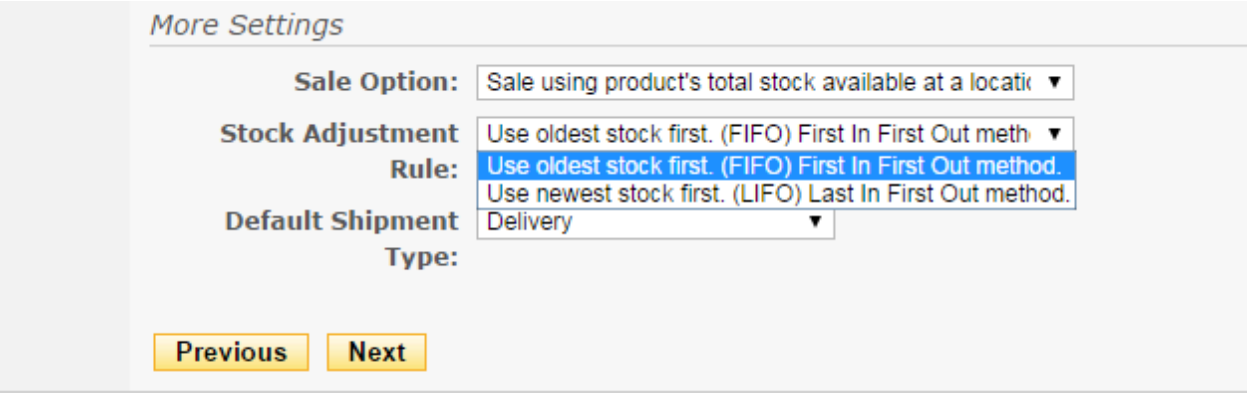
Figure 11: Sales Option Screenshot



- *Sale using product's total stock available at a location. Stock adjustment rule will be applied*: It will allow user to sell the selected item from the total available stock in a warehouse/location i.e. for each item only one entry will be shown to user for ordering the quantity from total stock quantity (irrespective of number of stock entries exist for a particular item in a location, system will show the total quantity). Stock adjustment rule will be applied to deduct your inventory on the basis of your selection (LIFO or FIFO).
- *Sale using product's individual stock entries available at a location:* This option allows users to choose a particular stock entry to be sold against a given product available at a selected location to be sold.
- *Sale using the product list without using the inventory:* Sell your goods directly from the product list without using or having the stock in your inventory. Inventory tracking is not applicable in this case.

2. Stock Adjustment Rule: Inventory deduction against a sale can be defined either with FIFO or LIFO method.

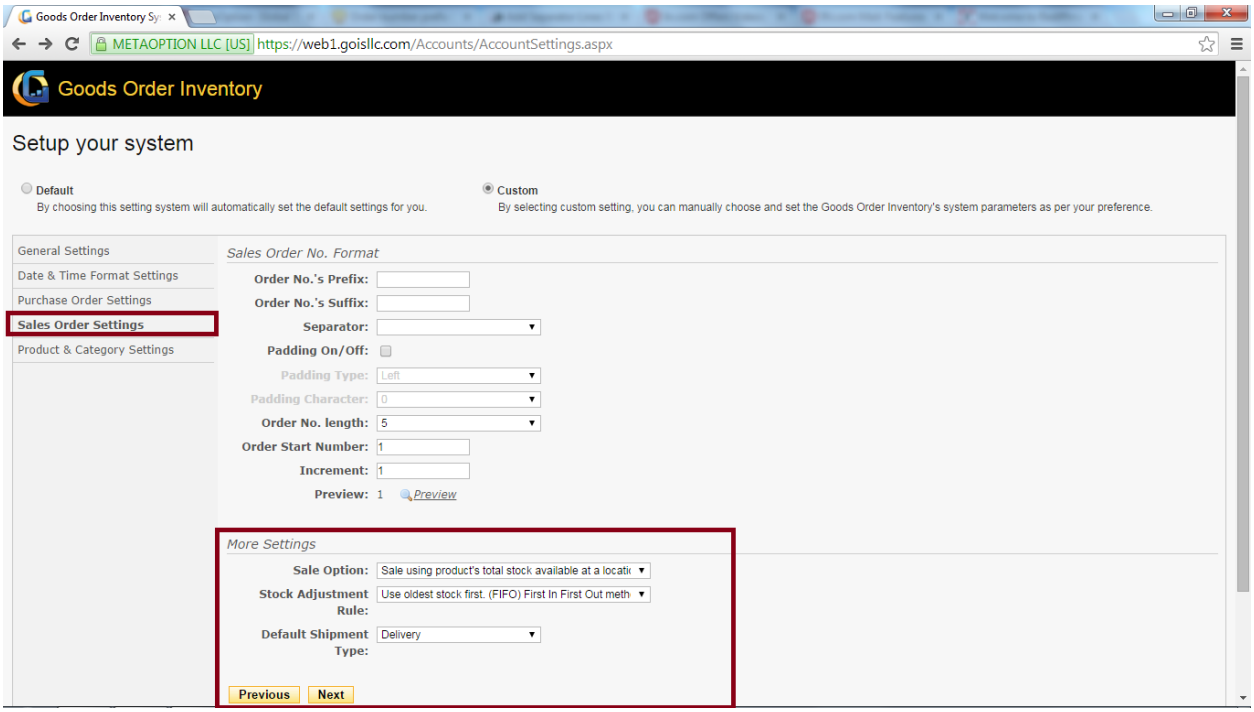
Figure 12: Stock Adjustment Rule Screenshot



- *Use oldest stock first. (FIFO) First in First Out method:* Manage your inventory by FIFO. It allows a user to sell the oldest item first, thereby, maintaining the new items in the inventory.
- *Use newest stock first. (LIFO) Last in First Out method:* Sell your newest stock first, thereby, maintaining the old items in inventory for future selling.

3. Default Shipment Type: This option allows user to choose the shipment mode for your sales orders. You have options to choose either 'Delivery' or 'Pickup' mode as per your business requirement.

Figure 13: Setup your system Page-Sales Order Settings

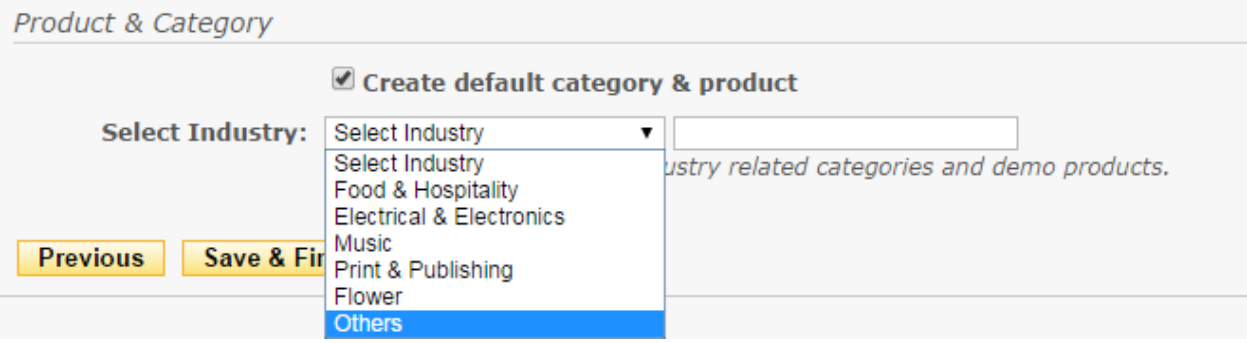


Product & Category Settings:

Select industry type by clicking on '*Create default category & product*'.

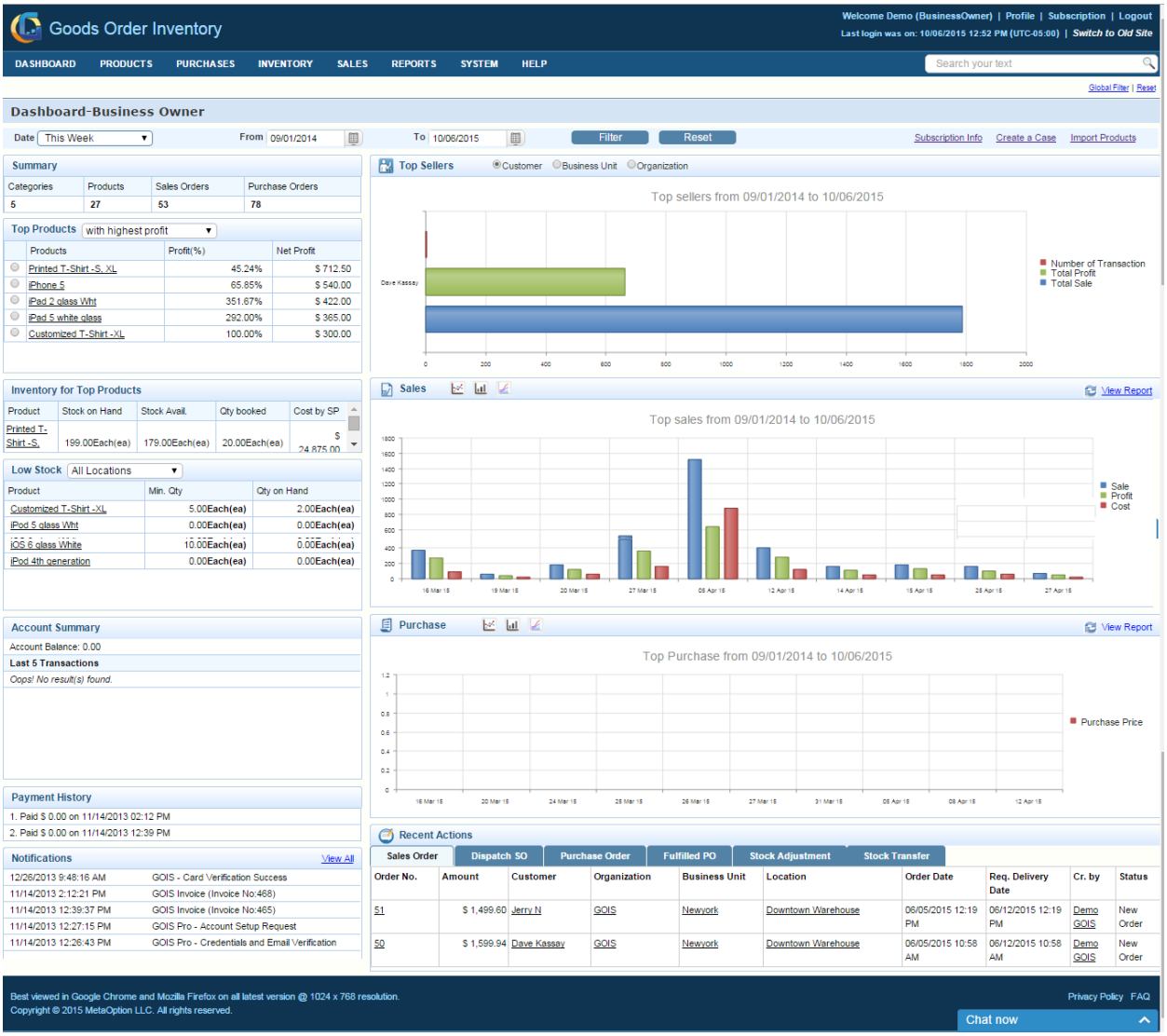
1. Check mark the 'Create default category & product' tab to select your industry type.
2. Select your industry type by scrolling down the drop box.

Figure 14: Product & Category Screenshot



3. Click **Save & Finish**, you will be redirected to Dashboard screen of GOIS-Pro after successful completion of account setup process.

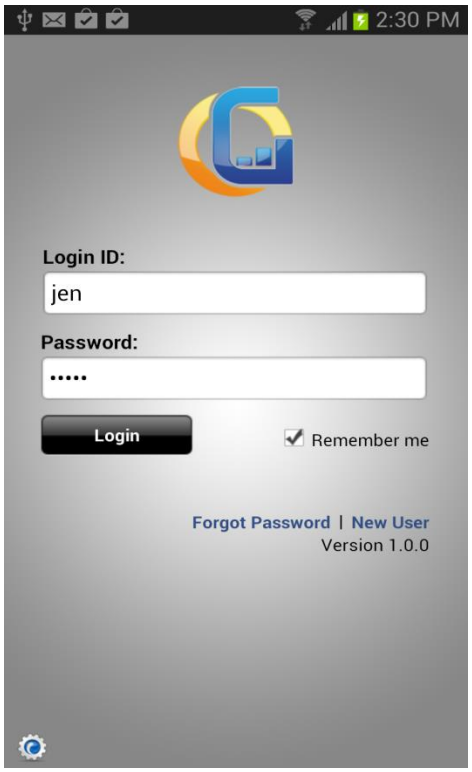
Figure 15: Dashboard Web Page



Login on Device

1. Login to your GOIS-Pro account with valid credentials.

Figure 16: Login on Device



Password Recovery

Recover your password in case you forgot the password.

1. Click on *'Forgot Password'*.
2. Enter your registered email.
3. Click on the submit button to proceed further.
4. A mail with password details will be sent to user's registered email.
5. Login with the new credentials provided in email to use your account.

Account Administration Settings on Device

You will be redirected to '*Setup your System'* after signing in for the first time to GOIS-Pro account on device app.

Default Setup

Default settings will allow system to automatically install the factory settings (default settings) without any user intervention. This prebuilt system offers client the standard specifications to suite the business requirement.

However, you can customize your GOIS settings as per as your business requirements.

Custom Setup

Manually set the parameters for Goods Order's inventory system as per business requirements. Fill all the required details to create a user centric business system.

Download Settings:

Click on this tab if settings are not downloaded.

General Settings:

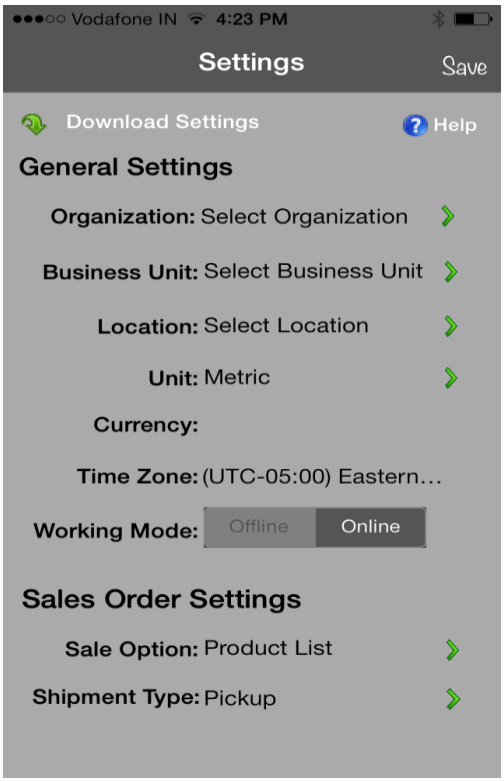
This tab is meant to provide general information pertaining to organization and other geographical information related to client's site.

1. Organization**:** Provide information related to your organization name in this field.
2. Business Unit**:** Mention your default business unit within the organization.
3. Location**:** Mention your default warehouse location under this field.
4. Unit Type: Set the standard measurement unit type. User will be given an option to choose either 'English' or 'Metric' as the default measurement unit type.
5. Currency: Manage your organization currency system under this field
6. Time Zone: Set the desired time zone for your organization.

Working Mode:

1. Online mode (Recommended): Synchronize your data with web server on real time scenario.
2. Offline mode: Access and manage your GOIS-PRO account in offline mode without synchronizing it to web in real time. You may continue to perform activities in remote area and during lack of internet connectivity and may keep in your device until you get connected with the internet for syncing.

Figure 17: Settings Page



Sales Order Settings:

Set customized rules for stock adjustment and goods shipment management. Under this link, a user has to fill all the information related to goods sale.

1. Sale Option: Select the best sales option which suites your business inventory requirements.

- *Available Stock:* It will allow user to sell the selected item from the total available stock in a warehouse/location i.e. for each item only one entry will be shown to user for ordering the quantity from total stock quantity (irrespective of number of stock entries exist for a particular item in a location, system will show the total quantity). Stock adjustment rule will be applied to deduct your inventory on the basis of your selection (LIFO or FIFO).

- *Available Stock Entries:* This option allows users to choose a particular stock entry to be sold against a given product available at a selected location to be sold.
- *Product List:* Sell your goods directly from the product list without using or having the stock in your inventory. Inventory tracking is not applicable in this case.

Use oldest stock first. (FIFO) First in First Out method: Manage your inventory by FIFO. It allows a user to sell the oldest item first, thereby, maintaining the new items in the inventory.

Use newest stock first. (LIFO) Last in First Out method: Sell your newest stock first, thereby, maintaining the old items in inventory for future selling.

2. Default Shipment Type: This option allows user to choose the shipment mode for your sales orders. You have the option to choose either 'Delivery' or 'Pickup' mode as per your business requirement.
3. Click on 'Save' button to save the settings.
4. You will be automatically redirected to 'Home Screen' of GOIS-Pro app after successful completion of account settings.

Figure 18: General Settings

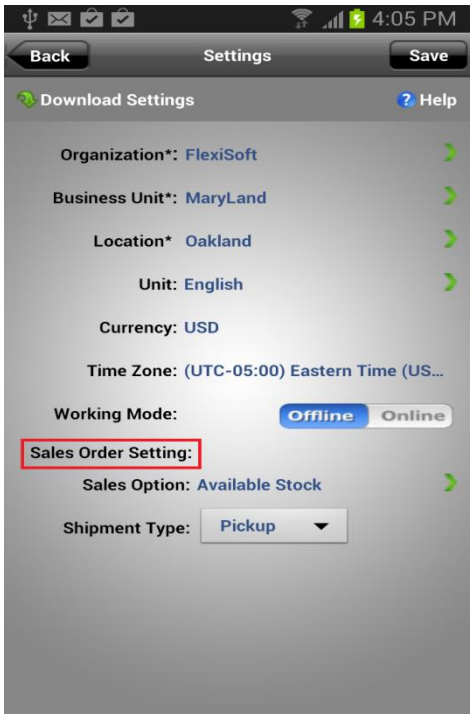
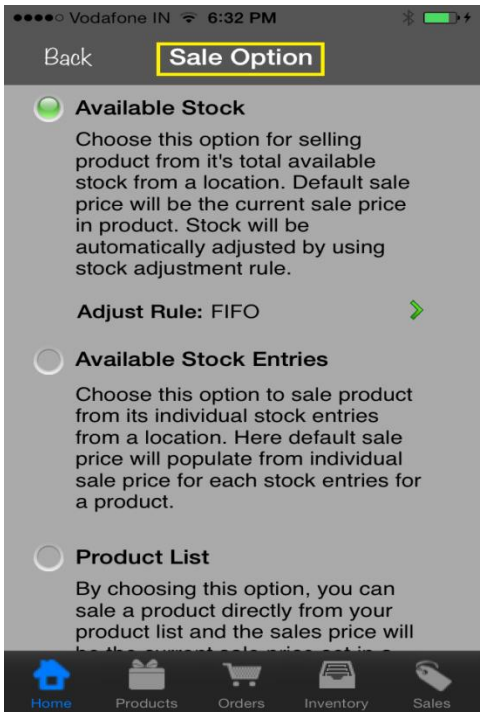


Figure 19: Sale Option Page



Home Screen

Home screen contains a set of inventory icons. Choose the one on which you want to work.

- Icons displayed on Home Screen:
  - Product
  - Purchase Order
  - Inventory
  - Sales
  - Manage
  - Reports
  - Settings
  - Sync
  - Utility
  - User Profile
  - Help

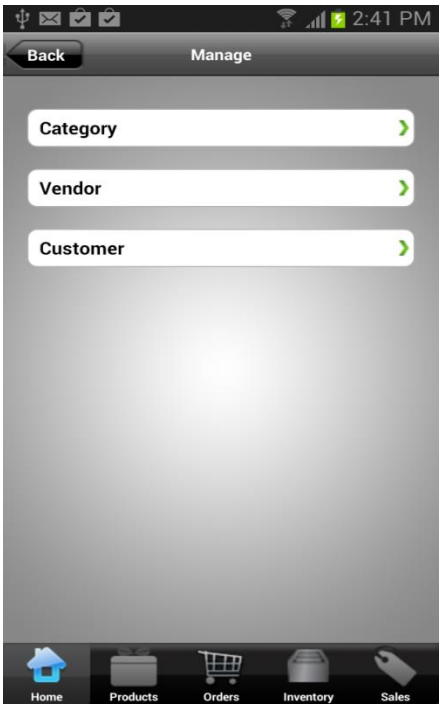
Figure 20: Home Screen

Manage

Manage and customize your business information as per your need.

- Manage your *Category*, *Vendor*, *and Customer* related information with GOIS-Pro android/iOS app.

Figure 21: Manage Page



Category

- Customize your category as per your needs.
- Add, modify, edit, delete, and perform many more key functions to set your category and to manage your product catalogue.

Add Category:

1. Tap on Category, then click on the (+) icon mentioned at top right corner of device screen under category screen.
2. Enter the name under the given field ‘Category name’.
3. Elaborate your category information in detail under ‘Description’ box.
4. Add/Remove image of your choice by clicking on ‘Select Image’ or ‘Remove Image’.
5. After providing all the necessary information for a category, click on ‘Save’ button.

Figure 22: Category Page

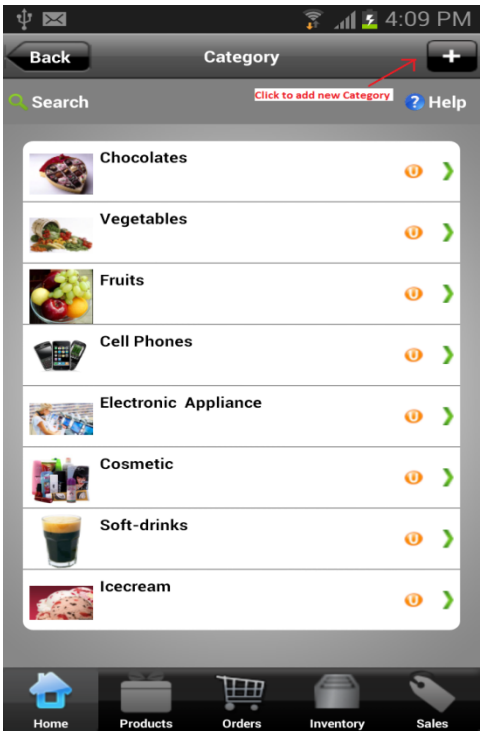
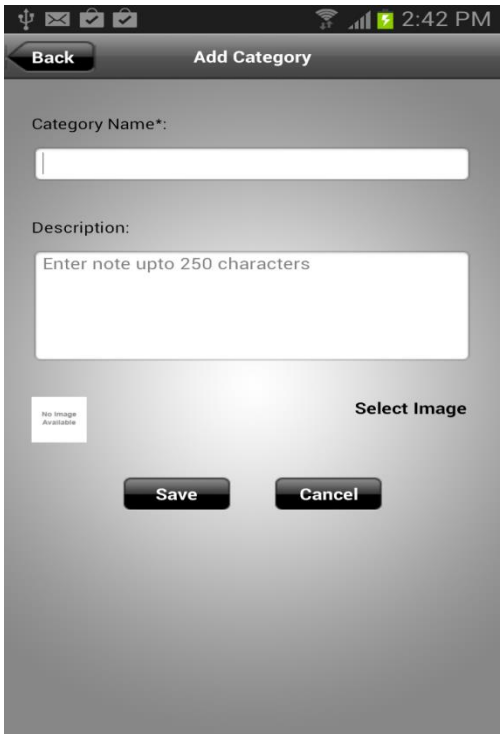


Figure 23: Add Category Page



Update Category:

1. Tap on Category and go to category list screen.
2. Select the category you want to update from the list of existing categories.
3. Modify the desired information and 'Save' it to fix the changes.

Delete Category:

1. Tap on Category and go to category listing screen.
2. Tap on the category you want to delete.
3. Click the delete button.
4. System prompts a message for the confirmation, choose 'Delete from Device and Server'.
5. The category will be deleted.

Figure 24: Edit Category

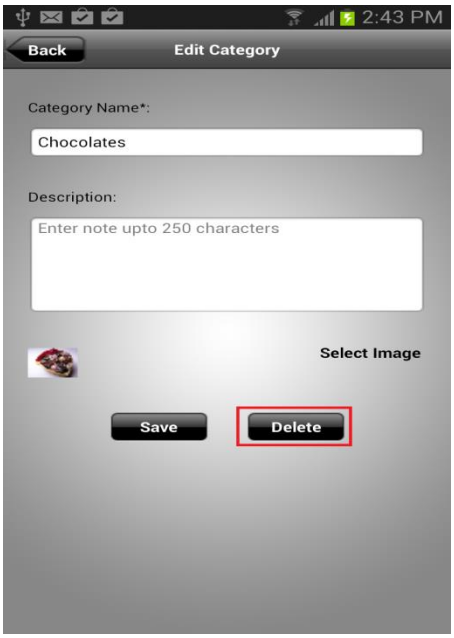
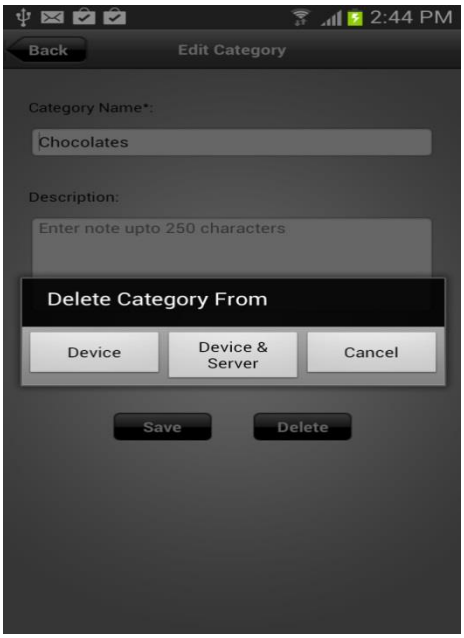


Figure 25: Delete Category

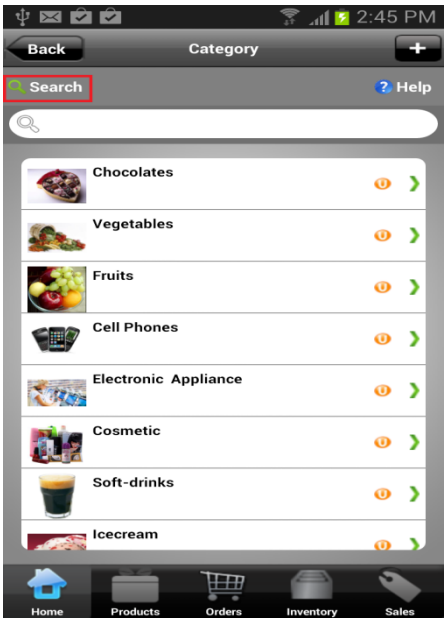


! Delete from "Device" will erase data only from your device memory & delete from "Device & Server" will delete data from device as well as from web server.

Searching/ Sorting:

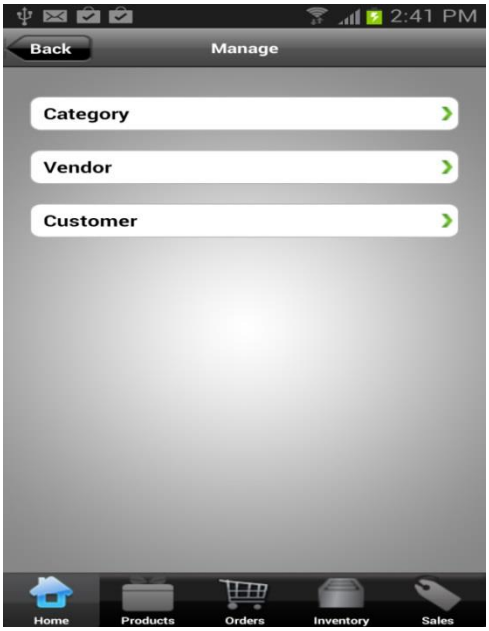
1. Click on the "Search" icon mentioned at top left corner of device screen.
2. Search bar will be displayed.
3. Search/ Sort your category with this tool.

Figure 26: Category Sorting



Vendor

- Customize and manage your vendor details as per your business needs.
- Add, modify, edit, delete and many more key functions available to set your vendor information as desired.



Add Vendor:

1. Tap on Vendor and click on the (+) icon mentioned at top right corner of screen.
2. 'Add Vendor' window will pops-up.
3. Enter the name of your vendor and vendor type.
4. Select the category to which vendor belongs from drop down list.
5. Elaborate your category information in detail under 'Description' field.

Figure 28: Manage-Vendor Page

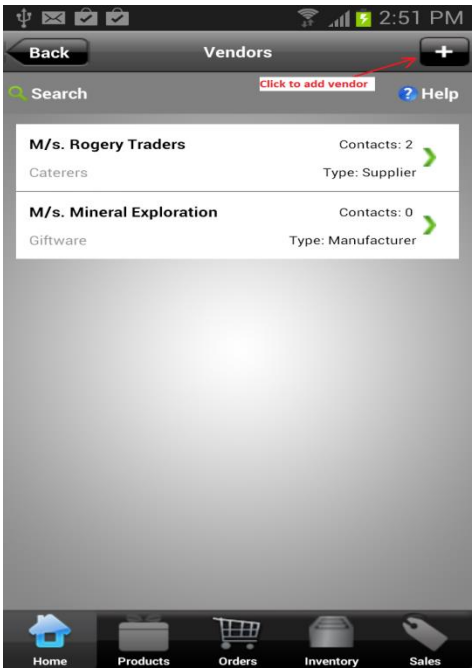
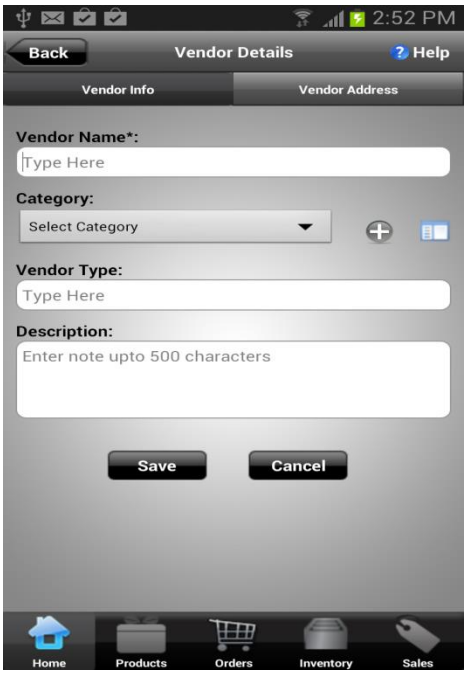


Figure 29: Add Vendor Page



Update Vendor:

1. Tap on 'Vendors' and go to vendor list section.
2. Tap on desired vendor you want to modify.
3. Edit and modify the vendor information.
4. Save the information.

Delete Vendor:

1. Tap on 'Vendors' and go to vendor list section.
2. Select the 'Vendor' you want to delete.
3. Click on the delete button.
4. System prompts a message for the confirmation, choose 'Delete from Device and Server'.
5. The vendor will be deleted.

Figure 30: Edit Vendor Page

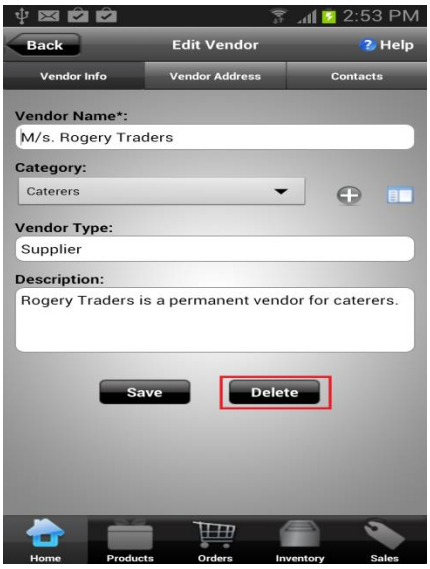
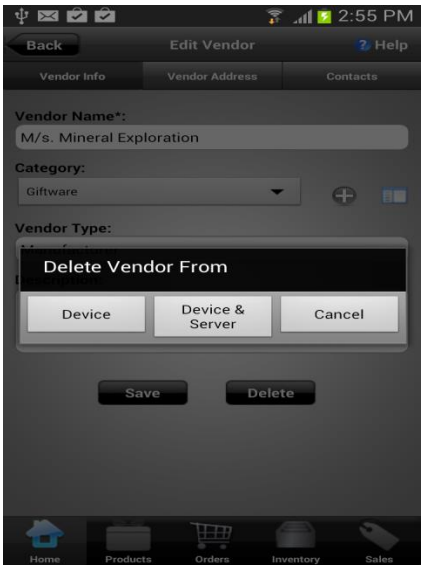


Figure 31: Delete Vendor Page

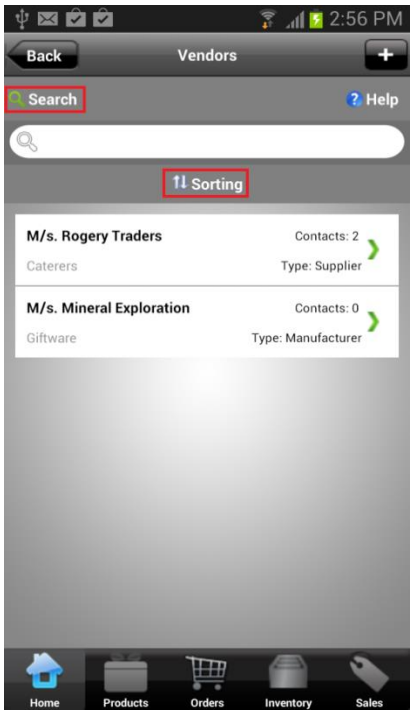


! Click on 'Device' icon to erase data from device memory only. Clicking on 'Device & Server' will erase data completely from device as well as web server.

Searching/ Sorting:

1. Under the vendor listing screen, click on the "Search" tab mentioned at top left corner of screen.
2. Search bar will be displayed.
3. Search/ Sort your Vendor list with this tool.

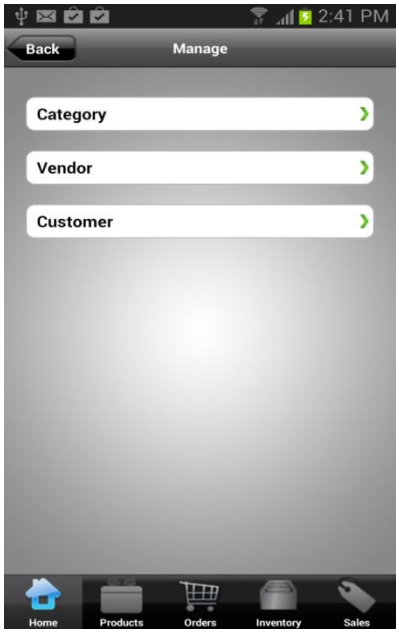
Figure 32: Vendor Search/Sorting Page



Customer

- Customize and manage your customer details as per your business needs.
- Add, modify, edit, delete, and many more key functions available to set your customer information as per your needs.

Figure 33: Customer Page



Add Customer:

1. Tap on the 'Customers' and click on the (+) icon mentioned at top right corner of screen.
2. 'Add Customer 'window will pops-up.
3. Add customer details, billing address, and shipping address in the mentioned field.
4. Save the information.

Figure 34: Customer List Page

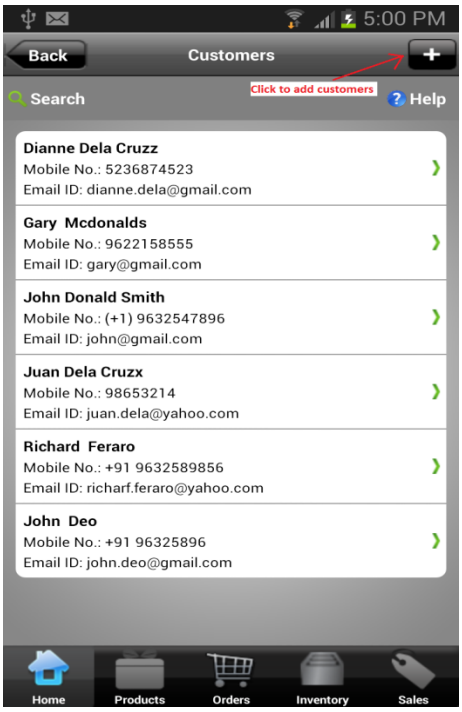
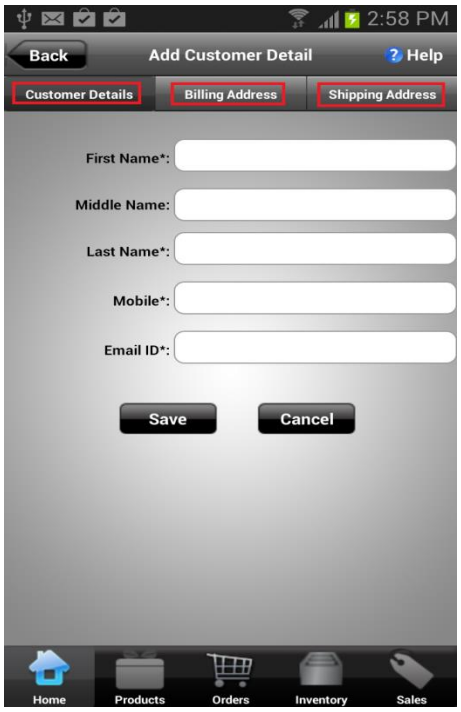


Figure 35: Add/Edit Customer Page



Update Customer:

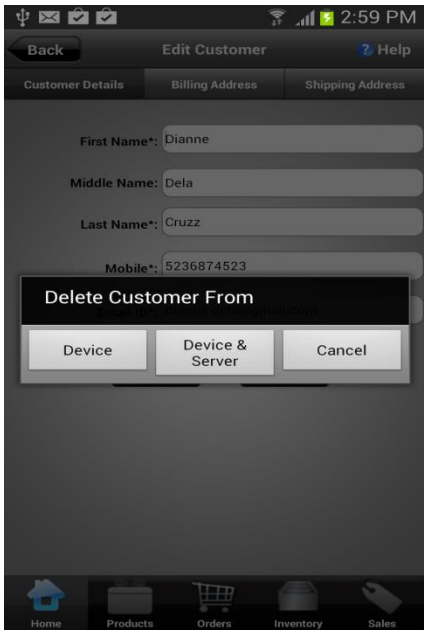
1. Tap on ‘Customers’ and go to customer listing section.
2. Click on the desired customer tab under customer listing to update the customer info.
3. Modify the desired information and save.

Delete Customer:

1. Tap on ‘Customers’ and go to customer listing section.
2. Select the customer you want to delete.
3. Click the delete button.
4. System prompts a message for the confirmation, choose ‘Delete from Device and Server’.
5. The selected customer will be deleted.

Figure 36: Add/Edit Customer Page

Figure 37: Delete Customer Page

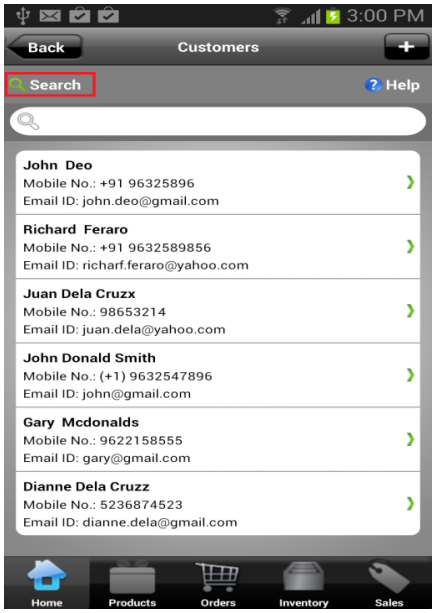


! Click on 'Device' to erase data from device memory only. Clicking on 'Device & Server' will erase data completely from device as well as web server.

Searching/ Sorting:

1. Click on the "Search" icon mentioned at top left corner of screen.
2. Search bar will be displayed.
3. Search/ Sort your Customer list with this tool.

Figure 38: Customer Search Page



Product

Manage your business product list as per your requirement.

- Add, edit, filter, sort, and manage your items and many more key functions available to set your product information as per your needs.

Figure 39.1: Product Page (iOS)

Figure 39.2: Product Page (Android)

Add Product

1. Click on the (+) icon mentioned at top right corner of device screen, under *Products bar*.
2. 'Add Product' window will pop-up.
   - *Product name:* Enter the name of your product.
   - *Category:* Link your product to its suitable category. User can assign more than one category to a product.
   - *SKU#:* Enter the product number manually or by leveraging scanning barcode (hit barcode icon to activate the camera and scan the barcode).
   - *Purchase Price:* Enter purchase price for a product to make it default for purchase order.
   - *Sales Price:* Enter sale price for a product to make it default for sales order.
   - *Unit:* Select a default measurement unit for your product under this tab.

- *Minimum Quantity:* Define a minimum quantity of your product under this tab. below which the item will be considered as 'under stock' and needs to be reorder to maintain the sufficiency.
- *Product Image:* Tap on 'Product Image' to view the pic.
- *View Album:* Click on 'View Album' to add, view, edit and delete the mapped image with a product.
- *Product Description:* Mention the features, additional information of your product under this section.

Figure 40: Add Product Page

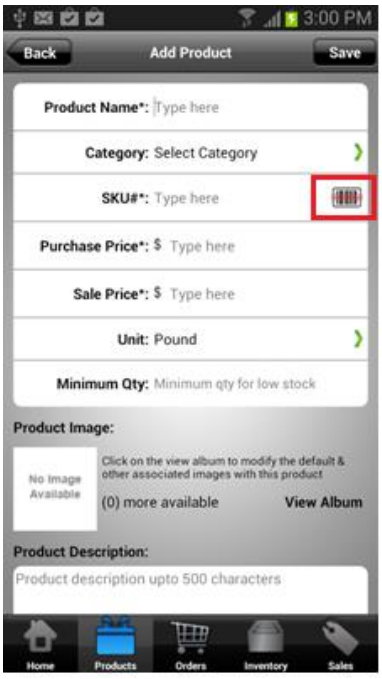


Figure 40.1: Scan Product (Android)

Figure 40.2: Scan Product (iOS)

3. Product Settings:
   - Click on '+' button given to expand the product settings.
   - *Is Free: A p*roduct marked as free is considered to be free of cost having the sale price as zero.
   - *Is Saleable:* Select to make the products available for sale.
   - *Is Published: Mark to publish a product in a given date.*
   - *Is Disabled: Mark this* tab to make the product inactive and will not be displayed on 'Product List'.

Figure 41: Add Product-Product Image page

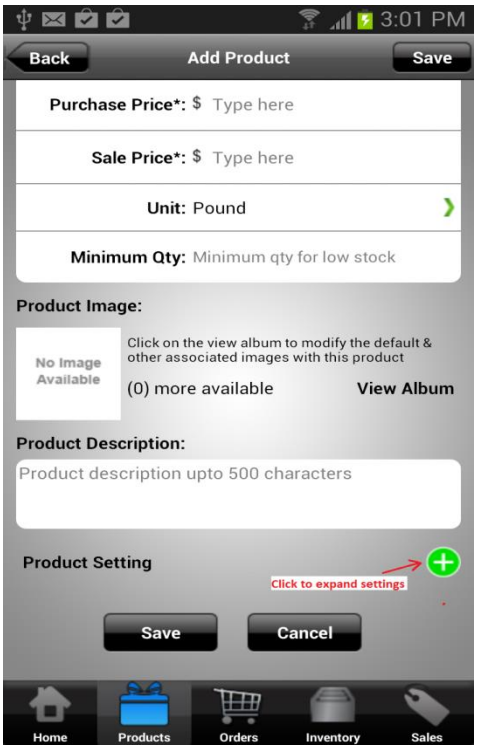
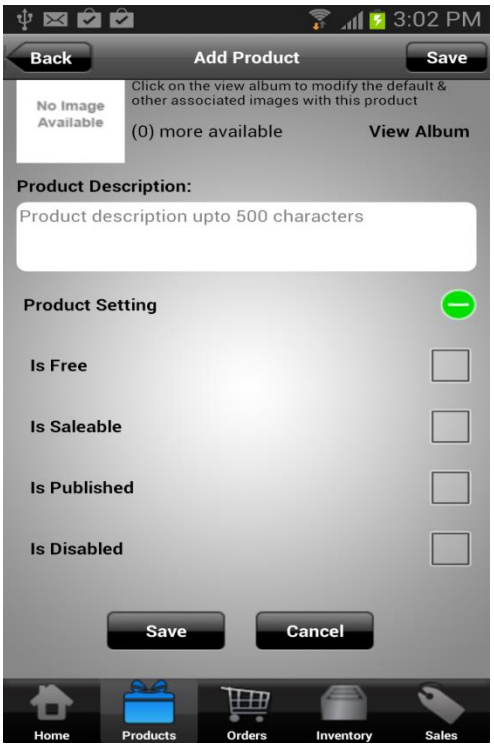


Figure 42: Add Product-Product Settings section



Update/Edit Product

1. On the 'Home' screen, click on 'Products' icon to see the product list.
2. Tap/select a product from the product list to edit or modify.
3. After modification, click on 'Save' button.

Delete Product

1. On the 'Home' screen, click on 'Products' icon to see the product list.
2. Tap/select a product from the product list to delete.
3. Click the delete button.

Note: A user is allowed to delete a product only if it is not in use under different sections of GOIS-PRO system like purchase, inventory and sale.

Figure 43: Edit Product-Description Page

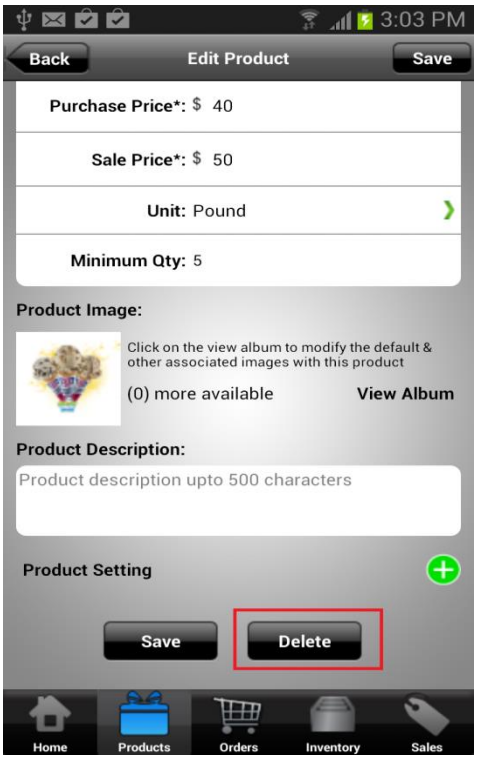
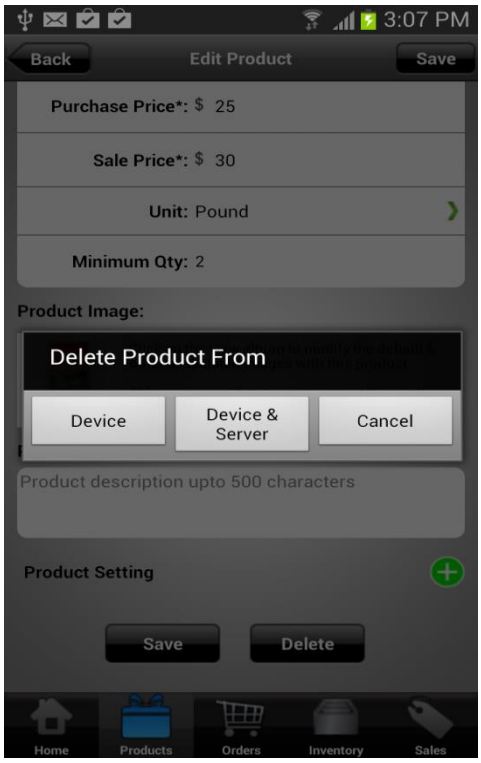


Figure 44: Delete Product Page



! Click on 'Device' button to erase a product from device memory only. Clicking on 'Device & Server' will erase data completely from device as well as from web server.

Product Sorting/Searching

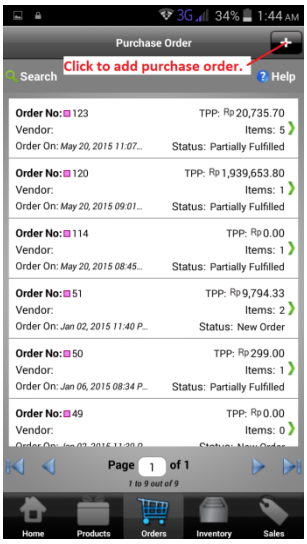
1. Under product listing screen, click on the “Search” icon given at top left corner of screen.
2. Search bar will be displayed.
3. Search/ Sort your product list with this app feature.

Figure 45.1: Product Sorting/Searching (Android) **Figure 45.2: Product Sorting/Searching (iOS)**

Purchase Orders

Purchase order section allows a user to create and manage list of purchase orders raised for different vendors and to order desired items for the fulfillment of your inventory.

Figure 46: Purchase Order Screen



Add Purchase Order

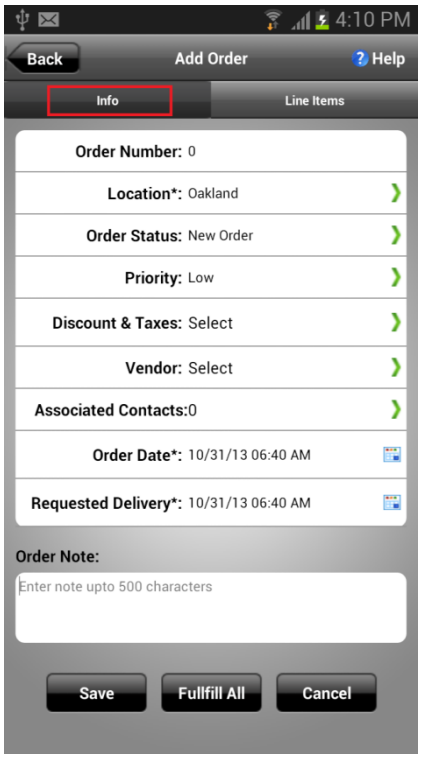
1. From the 'Home' screen of device app, click on 'Purchase Order' icon to navigate to Purchase Order listing page.
2. Click on the (+) icon given at top right corner of screen.
3. 'Add Purchase Order' window will pop-up.
4. Fill the required information under given tabs 'Info' and 'Line Items'.

Info Tab

- *Order Number:* Order number will be generated automatically depending on the settings saved in GOIS-Pro web account by the business owner.
- *Location:* Choose a location/warehouse for which you are creating a purchase order.
- *Order Status: M*anage/track/Set a desired order status for your purchase order created for a vendor.
- *Priority:* Set the purchase order priority as per your business needs. User can place their priority ranging from Low to medium to high upto immediate.
- *Discounts & Taxes:* Set discounts and taxes for an order.
- *Vendor:* Assign vendor to a purchase order.
- *Associated Contacts:* Vendor associated contacts will be automatically updated in directory.
- *Order Date:* Assign order date for your purchased order.
- *Requested Delivery:* Set the purchased order delivery date.

- *Note:* Add purchased order notes under this tab.

Figure 47: Info-Purchase Order Page



Line Items

Add, scan and fulfill your purchase order line items by providing the necessary information under 'Line Items' tab.

- *Add*

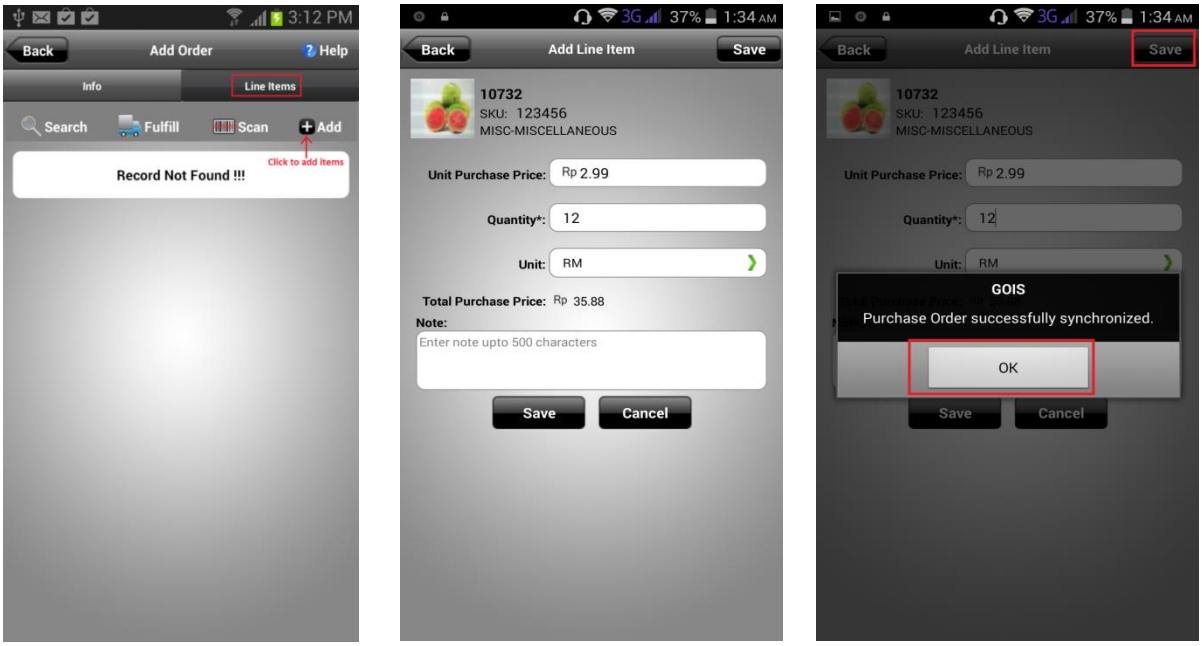
1. Click on the '+Add' button mentioned at top right corner of 'Line Items' screen to choose the item(s) from product list to be purchased.
2. User will be redirected to 'Products list' section.
3. Select desired product, specify product purchase price per unit, quantity to be ordered and measurement unit.
4. Click on the 'Save' to add item in an order.
5. Repeat steps 1 to 4 to line up/order multiple items.

- *Scan:* Add line items directly by scanning the product's barcode.

1. Click on the 'Scan' icon given under 'Line Items' screen.
2. On clicking to 'Scan' icon, your mobile rear camera will get activated to allow scanning to barcode.

3. Keep the mobile rear camera horizontally over the barcode, barcode will be detected if mapped with a product and will populate the relative information.
4. Provide product purchase price per unit, quantity to be ordered and measurement unit. In case no barcode is available or detected for a product under manage product list, you will be redirected to add product section to add that barcode in your business product list.
5. Click on 'Save' to add the line item.

Figure 48: Line items-Purchase Order Page



- *Fulfill icon/button:* After adding the line items in a purchase order, user may fulfill the desired items by selecting them and clicking on 'Fulfill' button.

- *Search/Sort:*
  1. Click on the "Search" icon given at top left corner of screen under 'Add Order' screen.
  2. On clicking, search bar will be displayed.
  3. Perform desired searching and sorting.

Update/Edit Purchase Order

1. Go to 'Purchase Order' Section given on Home screen.
2. Select the desired purchase order by tapping on it and modify the 'Purchase Order' information you want to update under 'Info' and 'Line Items' tab.
3. Save the updated detail.

Fulfill Purchase Order

Fulfill a purchase order 'fully' or 'partially' depending upon your inventory needs.

Fulfill All

This will fulfill the whole purchase order (all the items lined up in an order will get fulfilled at once).

1. Navigate to ‘Purchase Order’ section.
2. Select desired purchase order to be fulfilled.
3. Edit Order window will be pop-up.
4. Click on ‘Info’ tab.
5. Check the provided information under ‘Info’ tab.
6. Click on ‘Fulfill All’ button present at the bottom of the screen.
7. Click on ‘Yes’ when system ask for conformation.

Figure 49: Fulfill All-Purchase Order

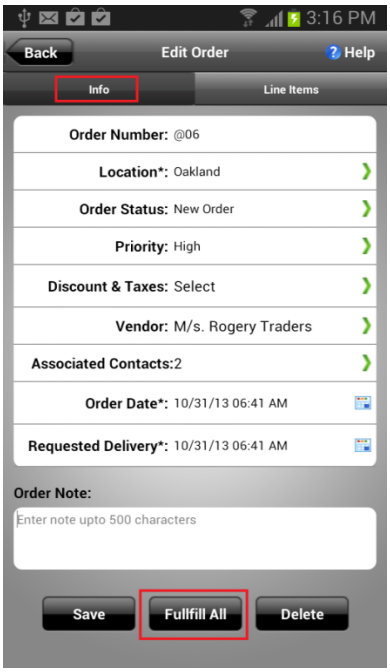
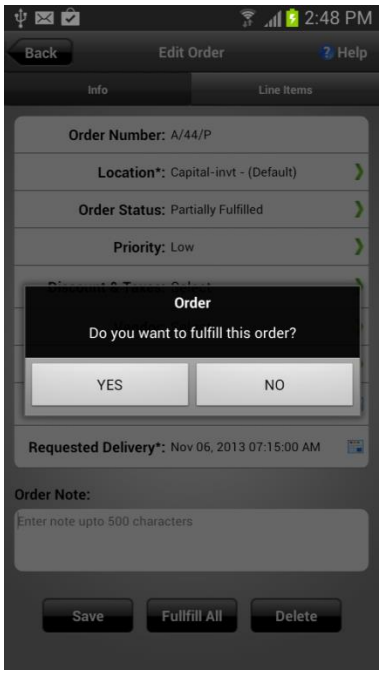


Figure 50: Fulfill All Confirmation Page



Partial/Fully Fulfill:

1. Navigate to ‘Purchase Order’ section.
2. Select desired purchase order to be fulfilled.
3. Go to ‘Line Items’ tab, present under ‘Edit Purchase Order’ screen.
4. All ordered items will be displayed under this section.
5. Click on the radio button against the desired ‘item’ you want to fulfill.
6. Click on ‘Fulfill’ icon given on the top grid under Edit Order – Line Item tab.
7. System prompt a message for the confirmation – say ‘OK’.

8. Check or modify the unit purchase price, unit sale price and quantity to be fulfilled under this screen.
9. Now click on either ‘Fulfill’ or ‘Fulfill and Close’.

➢ *Fulfill*:

- This provides user an option to move forward with partial quantity, letting user to fill the remaining quantity at later date.
- Order will remain in ‘Partially Fulfilled’ state until you fulfill complete ordered quantities.
- Click on ‘Fulfill’ to find the fulfilled quantities in your inventory.

➢ *Fulfill & Close:*

- This option is meant to close the order immediately whether user fulfilled all the ordered quantities or fulfilling the partial quantities of a purchase order.

Figure 51: Line Items-Fulfill Purchase Order

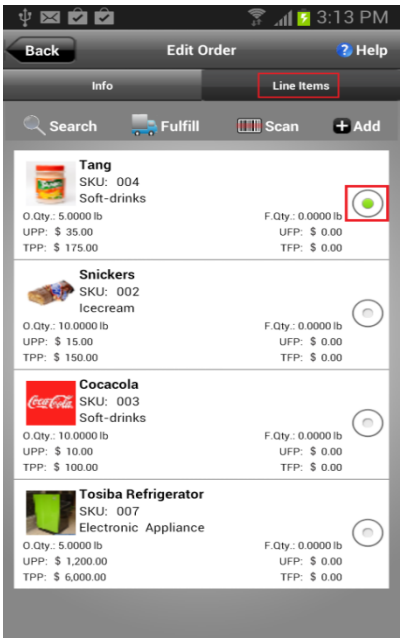
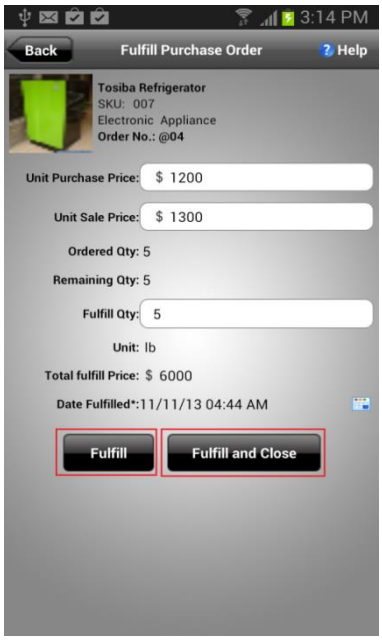


Figure 52: Fulfill &Close Purchase Order



Delete Purchase Order:

1. Go to ‘Purchase Order’ section.
2. Select the ‘Order’ you want to delete.

3. Click the delete button.
4. System prompts a message for the confirmation to delete the order from device & server. Choose Device & Server.
5. The selected purchase order will be deleted.

Figure 53: Edit Purchase Order

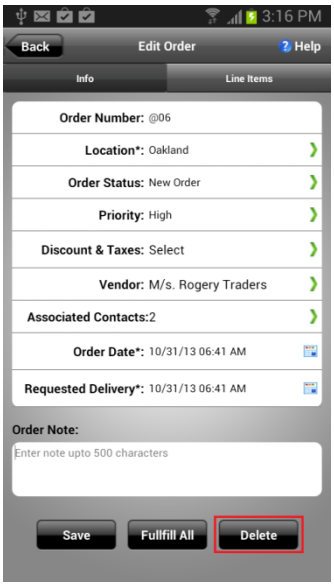
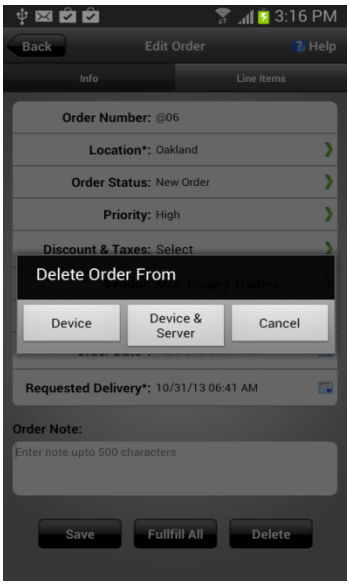


Figure 54: Delete Purchase Order

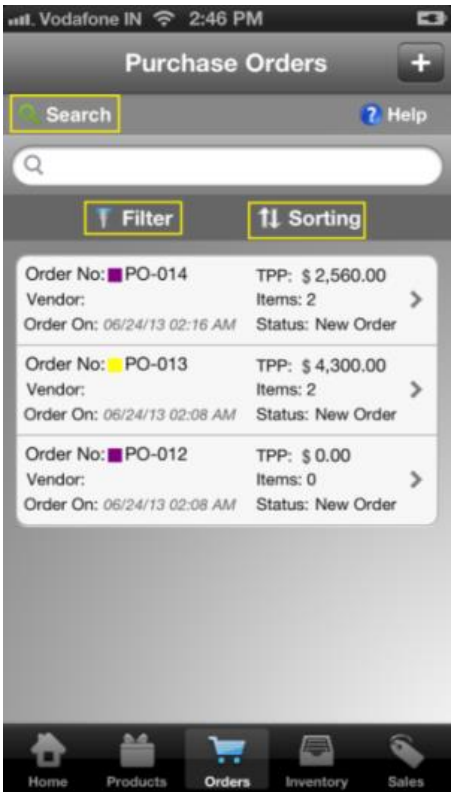


! Click on 'Device' to erase the data from device memory only. Clicking on 'Device & Server' will erase data completely from device as well as from web server.

Purchase Order Sorting

1. Click on the "Search" tab mentioned at top left corner of screen.
2. Search bar will be displayed.
3. Search/ Sort your Purchase Order list with this tool.

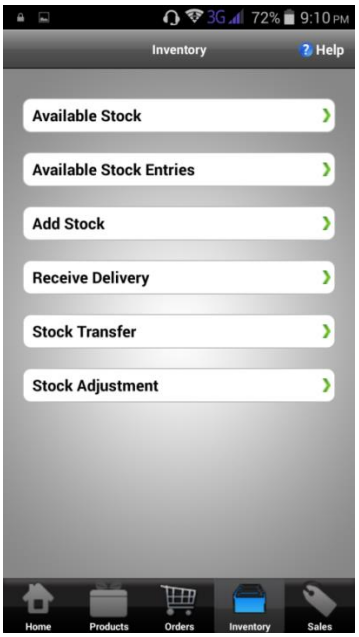
Figure 55: Purchase Order Sorting



Inventory

Add, manage, track, transfer and adjust your product stock for a particular inventory or warehouse or location.

Figure 56: Inventory Page



Available Stock

This option allows user to track all the IN/OUT transaction made into the inventory and also allows to add stock for items directly to the inventory.

Add Items in Stock:

1. Tap on the 'Inventory' icon given on 'Home' screen.
2. Click on 'Available Stock' option available under 'Inventory' section.
3. Click on the '+' icon mentioned at top right corner of the 'Available Stock' screen.
4. Product list will be displayed on screen.
5. Select the item you want to add to your stock list or scan the barcode if applicable.
6. User will be redirected to 'Add Stock' screen.
7. Provide unit purchase price, unit sale price and quantity.
8. Click on 'Save' icon to add the item in stock list.

Figure 58: Inventory screen

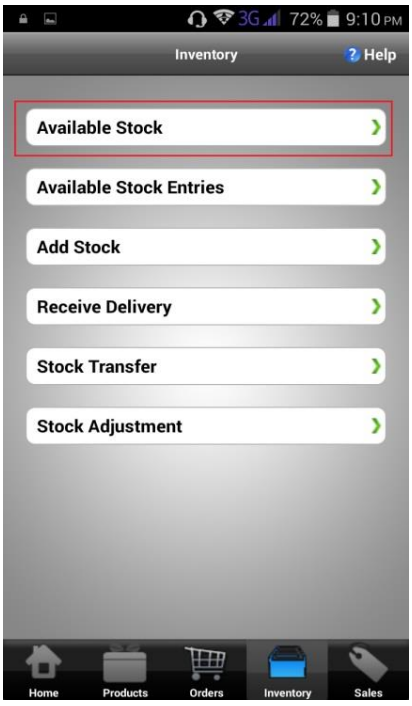
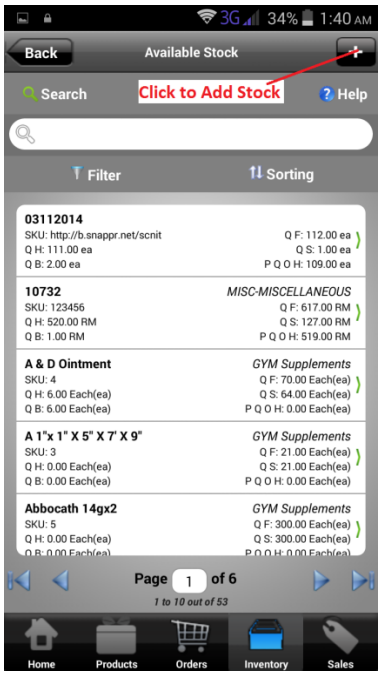


Figure 59: Inventory-Available Stock (+)

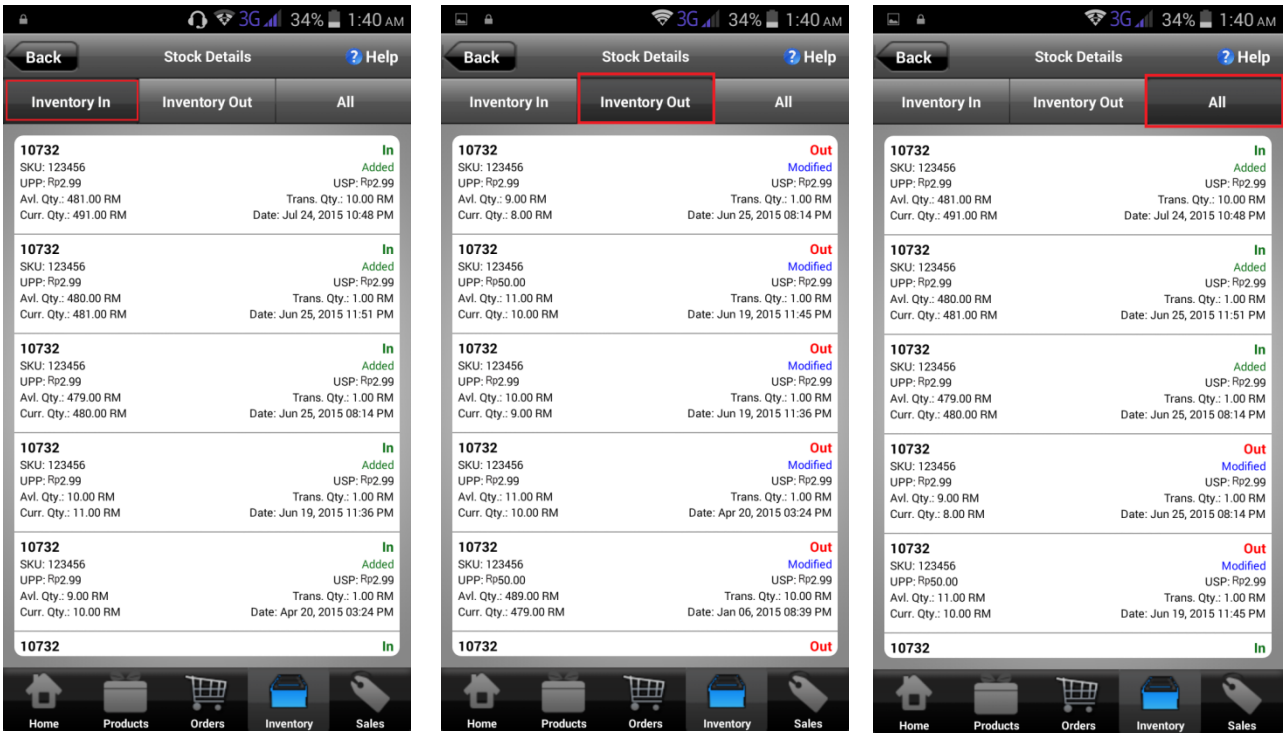


View Stock Transaction:

1. Tap on the 'Inventory' icon given on 'Home' screen.
2. Click on 'Available Stock' option available under 'Inventory' screen.
3. Stock items will be displayed on screen.
4. Select/tap on any stock item from the list to see its transaction details.
5. User can view transaction details through different mode.

- *Inventory In:* View the stock transaction details correspond to quantities Checked-In/Added into the inventory.
- *Inventory Out:* View the stock transaction details correspond to quantities Checked-Out/Deducted from the inventory.
- *All:* This tab displays all the transactions done on an inventory item stock. It includes both '*Inventory In'* as well as '*Inventory Out'* item transaction details.

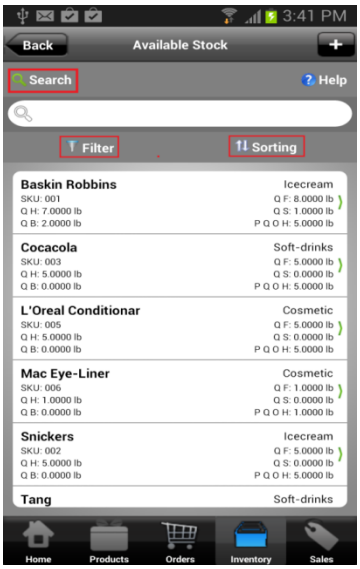
Figure 59: Inventory Stock Transaction Page



Search/Filter/Sorting

1. Click on the “Search” tab mentioned at top left corner of screen.
2. Search bar will be displayed.
3. Search/ Sort/Filter your item list using this feature.

Figure 60: Searching/Sorting Page



Available Stock Entries

View stocks under different category.

Add, update, delete, and search your stock entries with this option.

View Stock Entries:

1. Click on the 'Inventory' section given on 'Home' screen.
2. Click on 'Available Stock Entries' option available under 'Inventory' section.
3. Items which are having stocks in your inventory will be displayed on the screen.
4. Select any stock item from the list to see its transaction details.

! User can edit stock items under this section.

Figure 61: Available stock entries

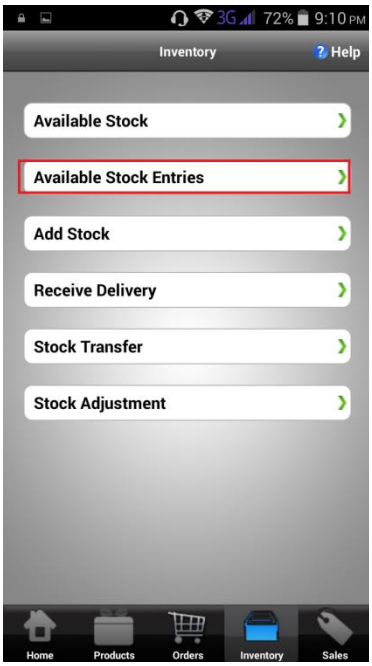
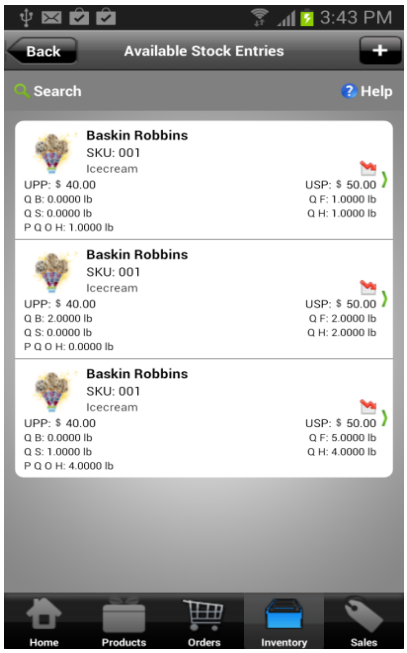


Figure 61.1: Select item to view stock entries

Figure 61.2: Available stock entries for an item



Add Items in Stock Inventory:

1. Click on the 'Inventory' section given on 'Home' screen.
2. Click on 'Available Stock Entries' option available under 'Inventory' section.
3. Click on the '+' icon mentioned at top right corner of the 'Available Stock Entries' screen.
4. Product list will be displayed on screen.
5. 'Select' or 'Scan' the item you want to add to your stock list.
6. User will be redirected to 'Add Stock' Screen.
7. Provide the necessary details (UPP, USP and QTY) and click on 'Save' icon to add the item in stock list.

Add Item Using Scan:

- Click on the 'Inventory' section given on 'Home' screen.
- Click on 'Available Stock Entries' option available under 'Inventory' section.
- Click on the '+' icon mentioned at top right corner of the 'Available Stock Entries' screen.
- Product list will be displayed on screen.
- Hit the barcode icon given under product list screen to scan the barcode.
- Keep the mobile rear camera horizontally over the red line of scanning screen.
- If barcode information will be saved into the product list, then device camera scanner will detect the barcode immediately and populate the corresponding details.
  Note: In case no barcode is available or detected, you will be directed to add product section.
- Provide all the necessary information to add a product stock and Save the stock entry.

Update Items in Stock Inventory:

1. Click on the 'Inventory' section given on 'Home' screen.
2. Click on 'Available Stock Entries' option given under 'Inventory' section.
3. Items which are having stocks in your inventory will be displayed on the screen.
4. Select/Tap any product and modify the desired stock information you want to update.
5. Save the updated detail.
   Note: Data/Inventory stock which is synced with the web server can't be edited. Only unsynced data can be edited.

Delete Items in Stock Inventory:

1. Click on the 'Inventory' section given on 'Home' screen.
2. Click on 'Available Stock Entries' option given under 'Inventory' section.
3. Items which are having stocks in your inventory will be displayed on the screen.
4. Select/Tap any product and delete the desired stock entry by clicking on 'Delete' button.
   Note: Inventory stock which is synced with the web server can't be deleted. Only unsynced data can be deleted (generally added on offline mode).

The Stock item will be deleted.

- *Device:* This option deletes data from device memory only.
- *Device & Server:* This option deletes data from device as well as from web server.

Figure 62: Edit/Delete Inventory

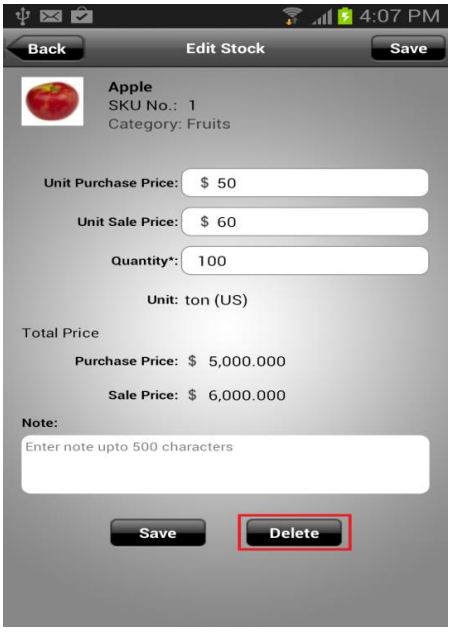
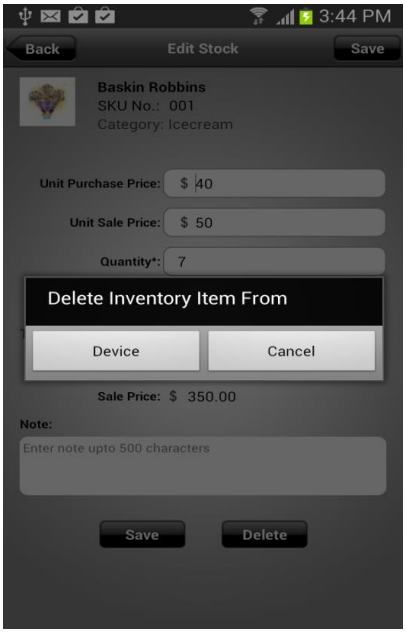


Figure 63: Delete stock confirmation

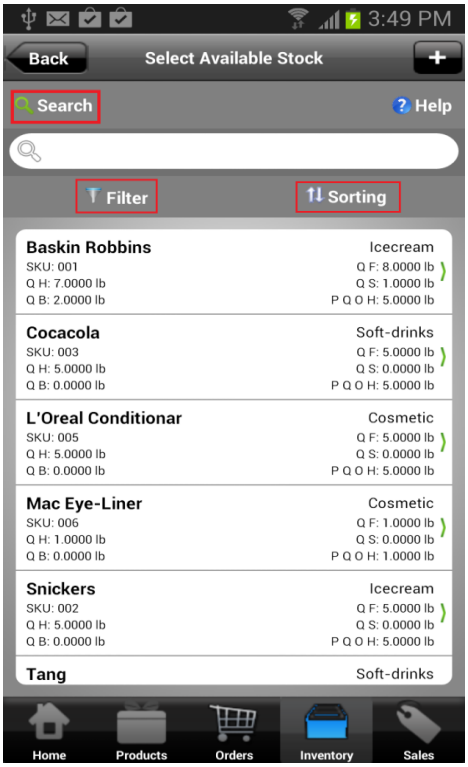


! Inventory data once synchronized to web server cannot be edited/deleted. Only unsynchronized data can be deleted using device app. If required, you may edit/delete it from web application.

Search/Filter/Sorting

1. Click on the “Search” tab mentioned at top left corner of ‘Select Available Stock’ screen.
2. Search bar will be displayed.
3. Search/ Sort/Filter your inventory item list using this feature.

Figure 65: Select Available Stock Page



Add Stock

This option allows users to add stock directly from ‘Product List’.

1. Click on the ‘Inventory’ section mentioned on Home screen.
2. Click on ‘Add Stock’ option available under ‘Inventory Section’.
3. Product list will be displayed on screen.
4. Select the item you want to add to your stock list.
5. User will be redirected to ‘Add inventory’ Screen.
6. Click on ‘Save’ icon to add the item in stock list.

Figure 66: Add Stock Page

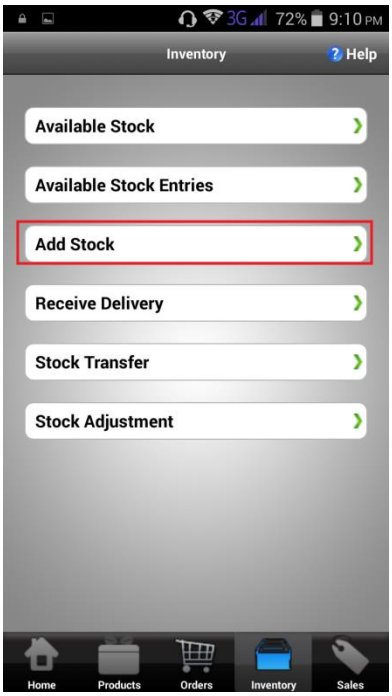
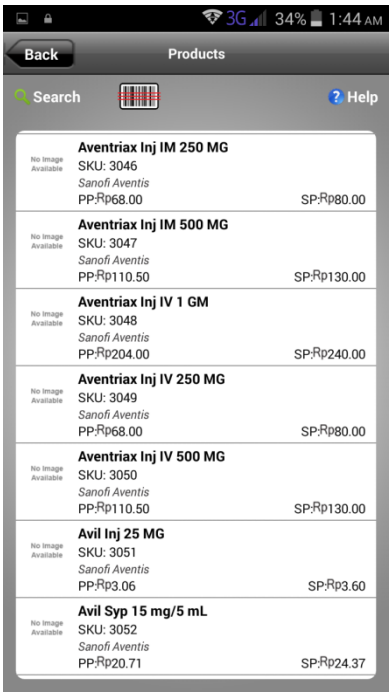


Figure 67: Add Stock Products Description Page



Receive Delivery

This option allows user to add stock items by fulfilling a purchase order.

1. Click on the 'Inventory' section mentioned on Home screen.
2. Click on 'Receive Delivery' option available under 'Inventory Section'.
3. Purchase Order Screen will be displayed on screen.
4. Select any purchase order item you want to fulfill for your stock and proceed.

Figure 68: Receive Delivery

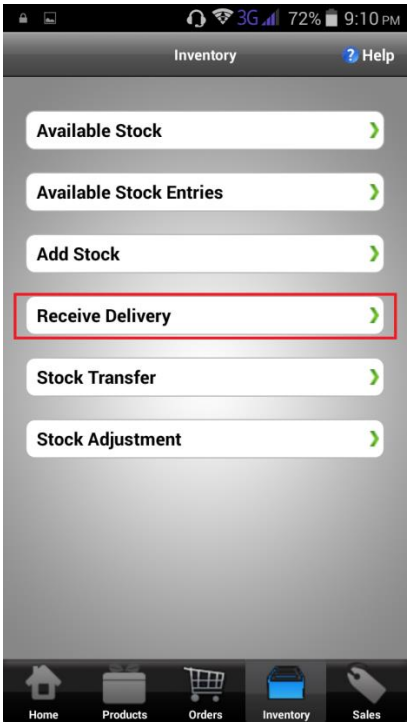
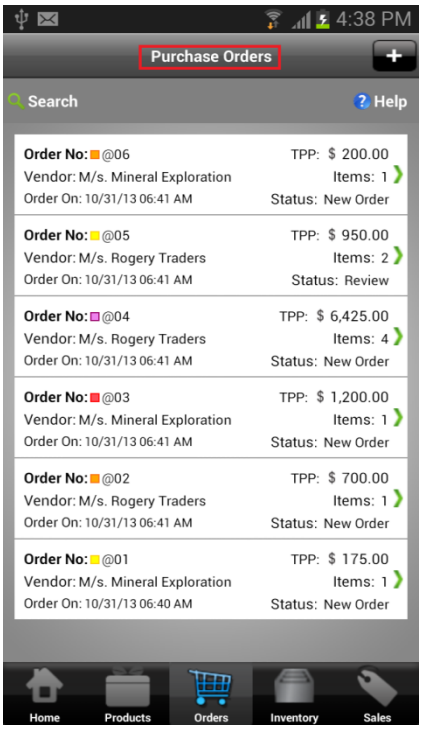


Figure 69: Purchase Order Description



Transfer Stock

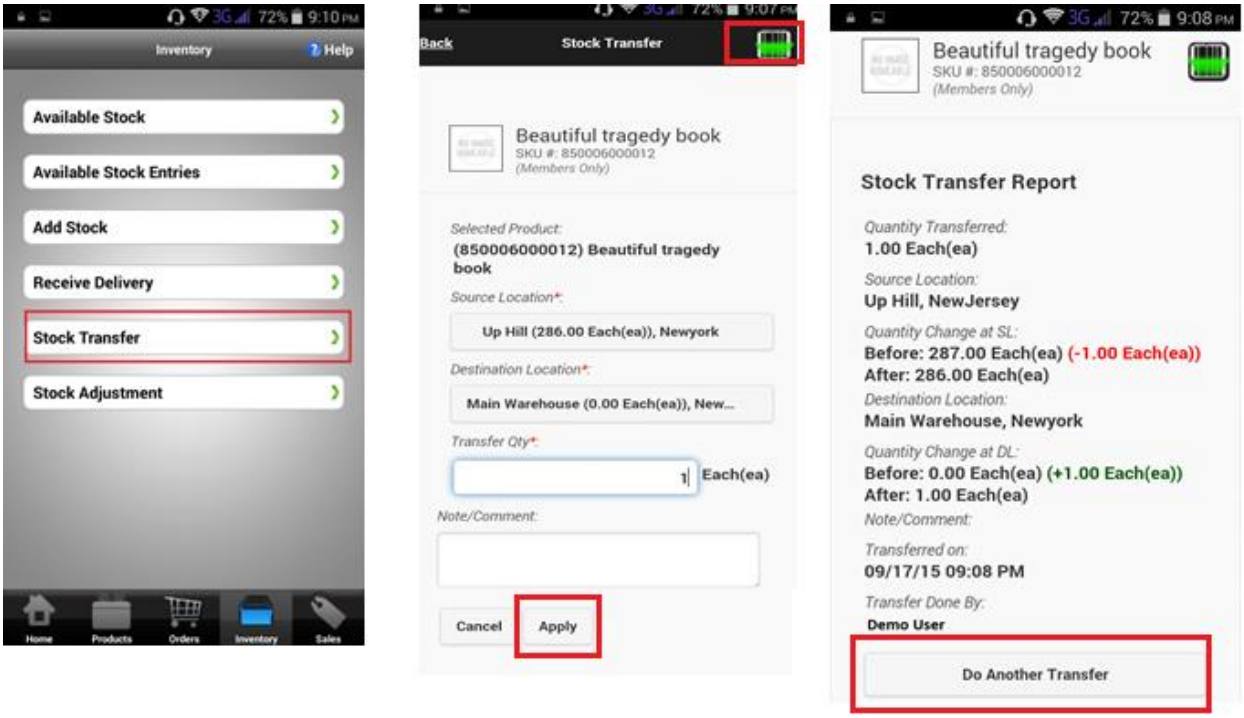
GOIS allows user to make necessary stock transfer from one location to another.

Steps to Transfer Stock from one location to another location:

1. From the 'Home' screen, click on 'Inventory' icon.
2. Tap on the Stock Transfer tab.
3. Now system will check whether the data is synchronized with web server or not and will prompt to sync the data. Choose Yes for data syncing.
4. Now, system will be navigated to 'Stock Transfer' screen having a list of inventory items for the selected location. User may change the source location by selecting the given 'Location' field on the page.

5. Select a product you want to transfer from selected source location and you will be navigated to product detail page (Stock Transfer).
6. Provide the 'Destination Qty', Qty. to be transferred and Transfer Note.
7. Click on Apply to process the transfer from 'Source' location to 'Destination' location.
8. System will generate a pop-up asking for the user confirmation to perform this action. Tapping on Ok button will create a new pop-up showing the success message of the transfer with details.

Figure: Inventory - Stock Transfer



Adjust Stock

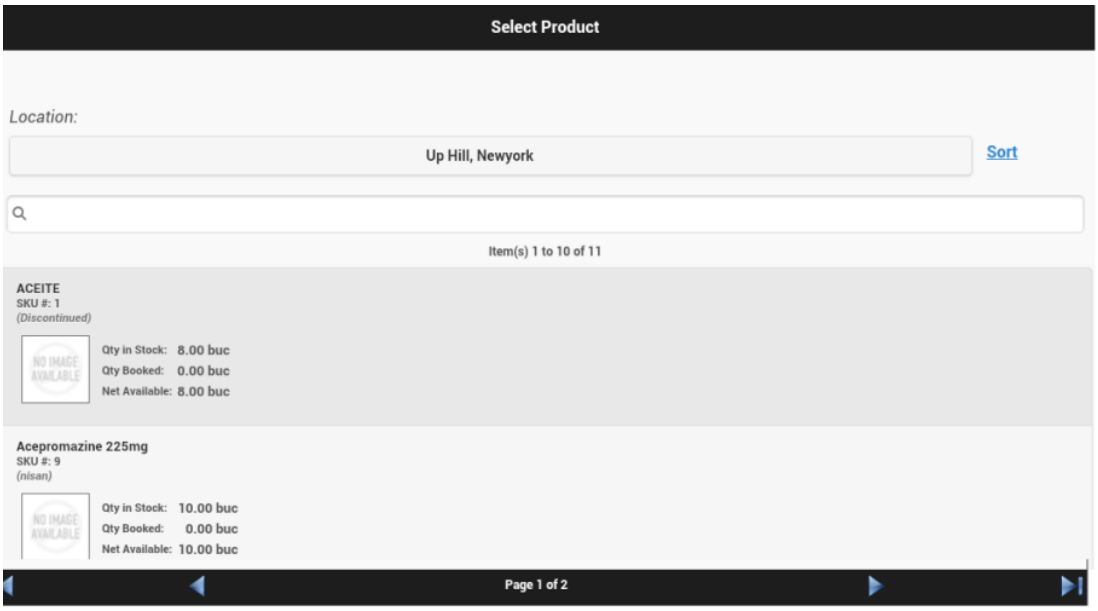
GOIS allows a user to make necessary stock adjustments in a location/warehouse against damaged, missing, stolen and returned items.

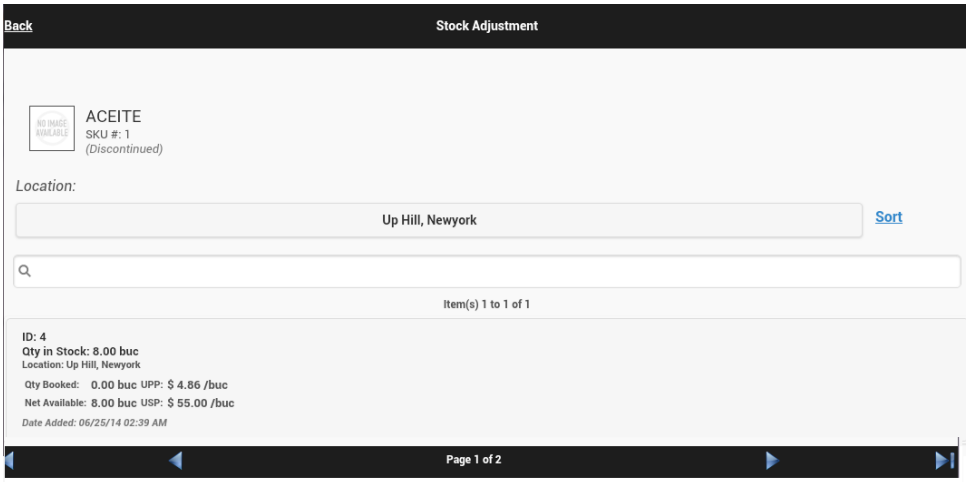
Steps to make Stock Adjustments in a location:

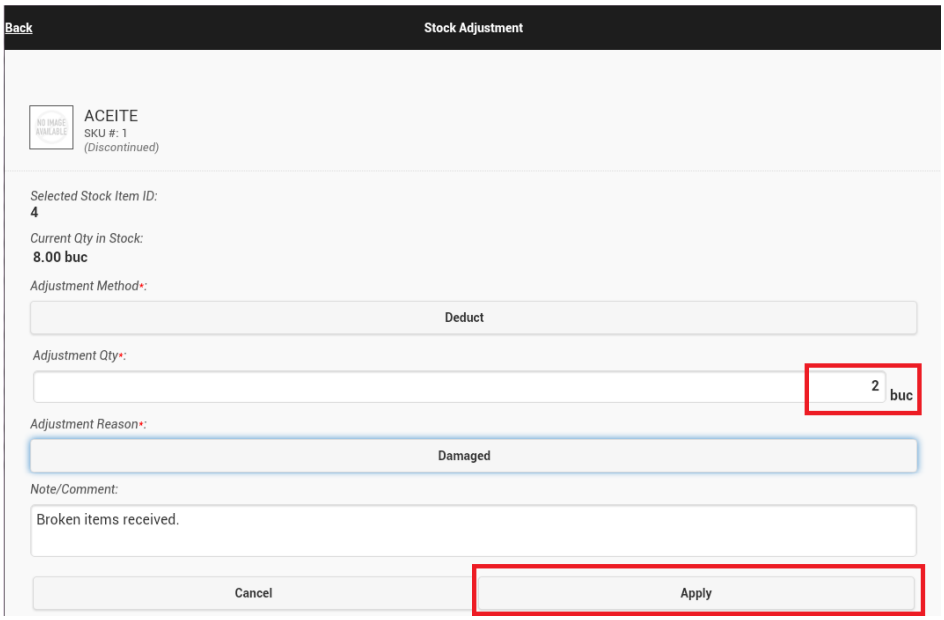
1. From the 'Home' screen, click on 'Inventory' icon.
2. Tap on the Stock Adjustment tab.
3. Now system will check whether the data is synchronized with web server or not and will prompt to sync the data. Choose Yes for data syncing.

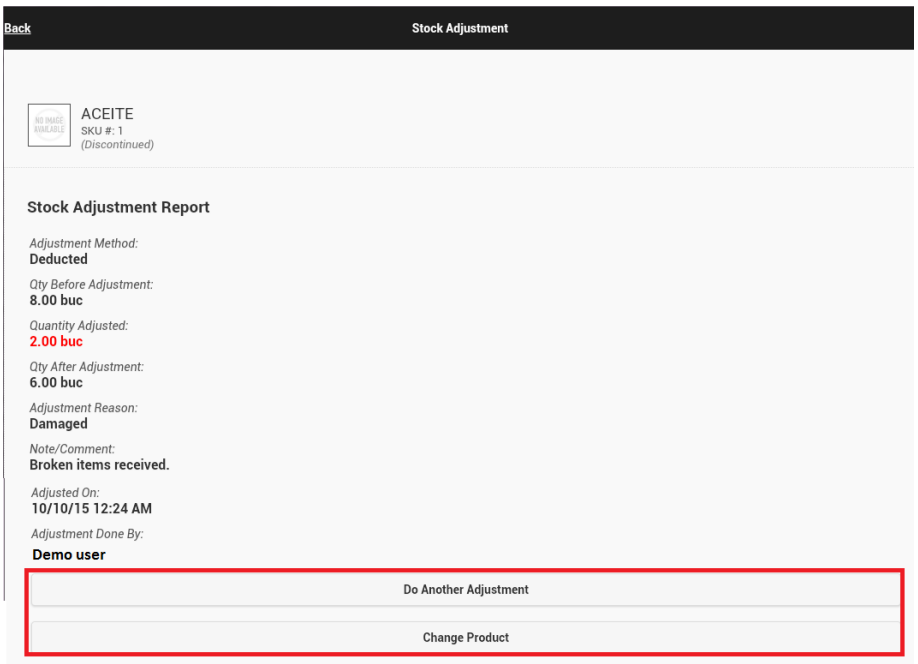
4. Now, system will be navigated to ‘Select Product’ screen having a list of inventory items for the selected location. User may change the location by selecting the given ‘Location’ field on the page.
5. Select a product you want to adjust for selected location and you will be navigated to product’s stock entries screen (Stock Adjustment).
6. Select a stock entry to be adjusted.
7. Provide Adjustment method, Adjustment Qty, Adjustment reason, Adjustment note and hit ‘Apply’ button.
8. System will prompt a popup message for the confirmation, say Ok.
9. Now a successful message will be shown to the user, say OK.
10. Tapping on the Ok Button will redirected to another page showing the details related to the adjustment, this page also contains a “Do Another Adjustment” button user can tap on this for more transactions.

Figure: Inventory – Stock Adjustments




Back
Stock Adjustment
ACEITE
SKU #: 1
(Discontinued)
Location:
Up Hill, Newyork
Sort
Item(s) 1 to 1 of 1
ID: 4
Qty in Stock: 8.00 buc
Location: Up Hill, Newyork
Qty Booked: 0.00 buc UPP: $ 4.86 /buc
Net Available: 8.00 buc USP: $ 55.00 /buc
Date Added: 06/25/14 02:39 AM
Page 1 of 2

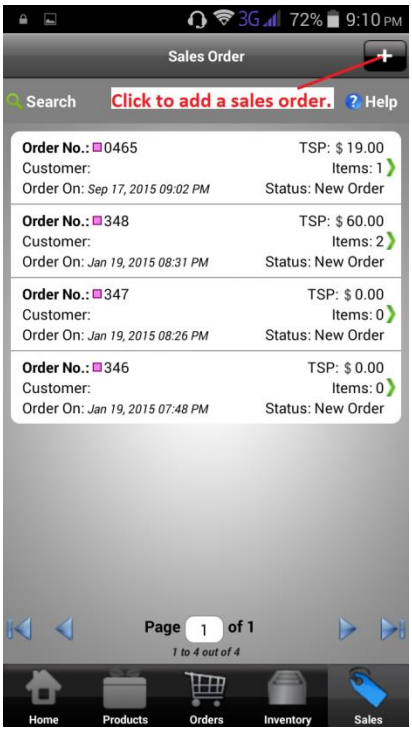

Back
Stock Adjustment
ACEITE
SKU #: 1
(Discontinued)
Selected Stock Item ID:
4
Current Qty in Stock:
8.00 buc
Adjustment Method*:
Deduct
Adjustment Qty*:
2
buc
Adjustment Reason*:
Damaged
Note/Comment:
Broken items received.
Cancel
Apply


Back
Stock Adjustment
ACEITE
SKU #: 1
(Discontinued)
Stock Adjustment Report
Adjustment Method:
Deducted
Qty Before Adjustment:
8.00 buc
Quantity Adjusted:
2.00 buc
Qty After Adjustment:
6.00 buc
Adjustment Reason:
Damaged
Note/Comment:
Broken items received.
Adjusted On:
10/10/15 12:24 AM
Adjustment Done By:
Demo user
Do Another Adjustment
Change Product

Sales Order

Add, Manage, Dispatch, Edit, Search and Sort your sales order for a particular location using this section.

Figure 70: Sales Order Page



Add Sales Order

1. Click on 'Sales Order' icon given on 'Home' screen of device app.
2. You will be navigated to Sales Order screen.
3. Click on the (+) icon given on top right corner of the screen.
4. 'Add Sales' window will pop-up.
5. Fill the required information under sections 'Info', 'Line Items' and 'Customer Details' tabs.

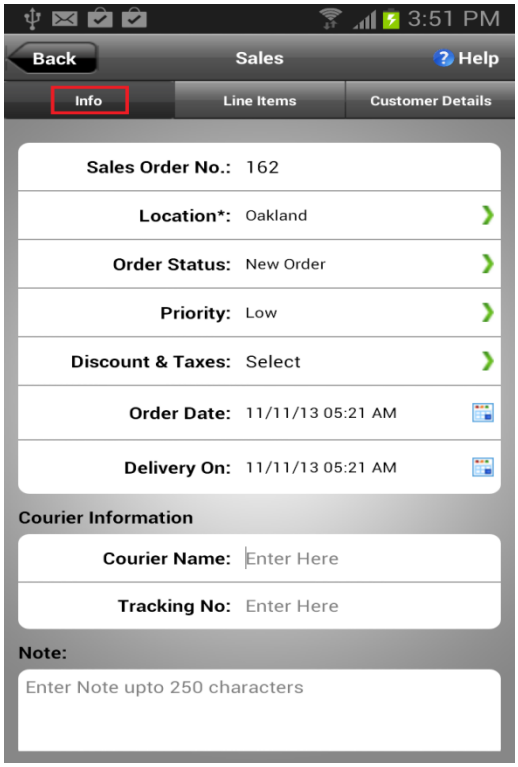
Info Tab:

- *Sales Order Number:* Order number is generated automatically depending on the user defined sales format settings saved in GOIS-Pro web server.
- *Location: Choose the* warehouse/inventory location from which you want to deduct the product stock.
- *Order Status:* Review and maintain your sales order status until it dispatched to a customer.

- *Priority:* Set the priority of an order. User can set the priority ranging from low to medium to high and upto immediate.
- *Discounts & Taxes:* Set discounts and taxes applicable for a sales order.
- *Order Date:* Assign order date for your sales order.
- *Delivery On:* Assigned date of delivery.
- *Courier Name:* Name of the courier through which order is dispatched.
- Tracking Number: Track your sales order with unique coded number.
- *Note:* Add sales order note if required.

! User cannot change the location of Partially Fulfilled Order

Figure 71: Add Sales Order-Info Page



Line Items

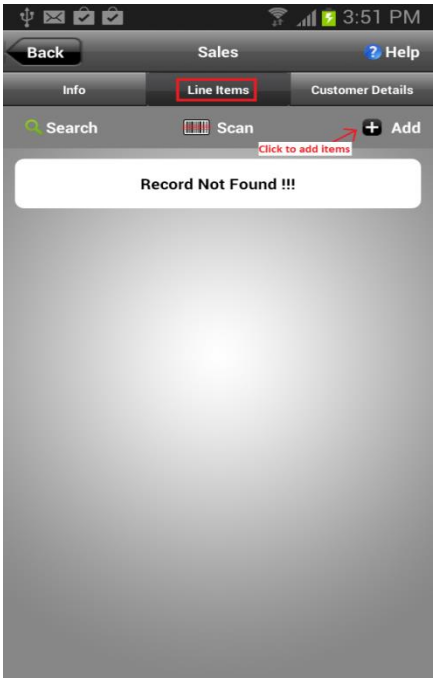
Add, scan and sort your sales order line items by providing the necessary information under this 'Line Items' tab.

- *Add*

1. Click on the given '+Add' button under 'Line Items' screen.
2. User will be redirected to 'Product List' or 'Inventory List' section as per the sales order settings.

3. Specify the product's sale price, measurement unit, quantity to be sold, discount and note information.
4. Click on the 'Save' to line-up an item into the order.

Figure 72: Edit Sales Order-Line Items



- *Scan:* Add line items in an order by scanning the product's barcode – if mapped with a product.

1. Click on the 'Scan' icon given under 'Line Items' tab. Mobile rear camera will be activated to scan the barcode. Keep the mobile rear camera horizontally over the barcode.
2. As soon as the barcode will be detected, corresponding item information will be populated and Add sales item screen will be displayed.
3. In case no any barcode is mapped or detected, you will be directed to add product screen.
4. Provide the necessary information and Save the line item in an order.

- *Search/Sort:*

1. Click on the "Search" tab mentioned at top left corner of Sales- line item screen.
2. Search bar will be displayed.
3. Perform desired Searching/ Sorting using this feature.

Customer Details

Add your customer details in a sales order using this tab.

- *Select/Modify Customer: Choose/*Modify customer as per your business needs.

- Click on ‘Select Modify Customer’ link.
- ‘Customer list’ will be displayed.
- Select desired customer to add under a sales order.

➢ *Remove Customer:* Click the ‘Remove’ link to remove the customer details assigned in a given sales order.

➢ *Customer Information:* Customer’s detailed information related to contact info, billing address, and shipping address will be displayed under this section.

➢ *Customer Preference:* Set customer preferences.

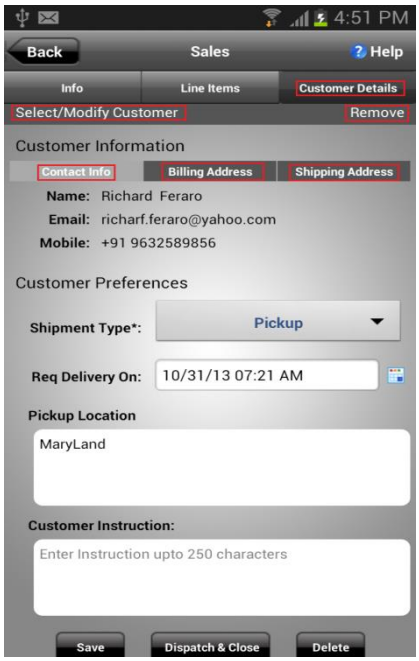
- Shipment Type (Delivery or Pick up).
- Requested Delivery On.

➢ *Delivery Location: L*ocation from where the inventory will be deducted.

➢ *Customer Instructions* (If any).

Click on ‘**Save’** button to save the customer information.

Figure 73: Customer Details Page



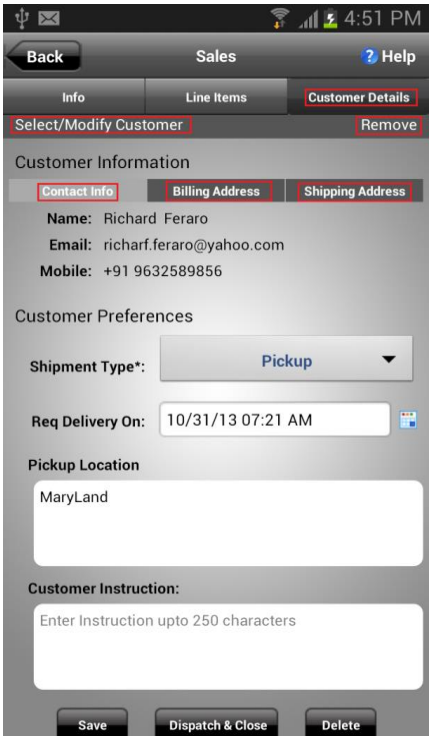
Dispatch Sales Order:

Dispatch a sales order from ‘Info’ or ‘Customer details’ tab given under a Sales Order.

1. Go to ‘Sales Order’ section present on Home screen.
2. Select any order from ‘Sales Orders List’.
3. Click on ‘Info’ or ‘Customer details’ tab.

4. Click on ‘Dispatch & Close’ button given at the bottom of the screen.
5. Your order will be dispatched and will go to close order details section of report.

Figure 74: Sales Order-Dispatch & Close screen under Customer Details tab



Update Sales Order:

1. Go to ‘Sales Order’ section given on ‘Home’ screen.
2. Tap on desired sales order you want to edit and modify the sales order information you want to update.
3. Save the updated detail.

Delete Sales Order:

1. Go to ‘Sales Order’ section.
2. Select the order you want to delete.
3. Scroll down to bottom and click on the ‘Delete’ button.
4. System will prompt a confirmation message, choose ‘Device & Server’ to delete a sales order.
5. On clicking, the selected sales order will be deleted.

Figure 75: Edit Sales Order Page

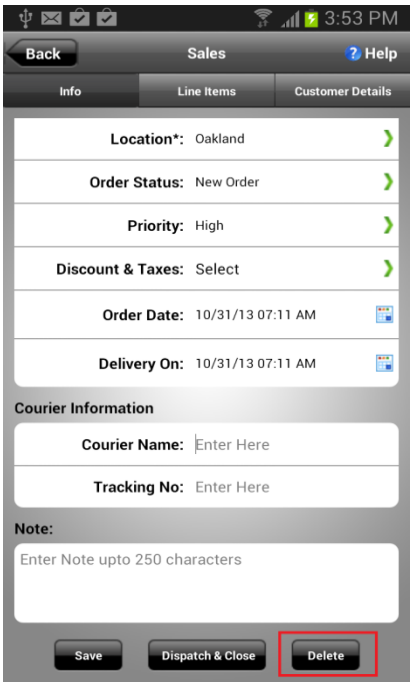
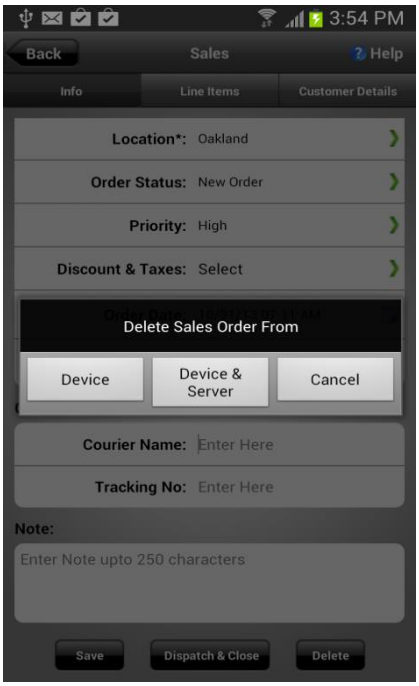


Figure 76: Delete Sales Order Page

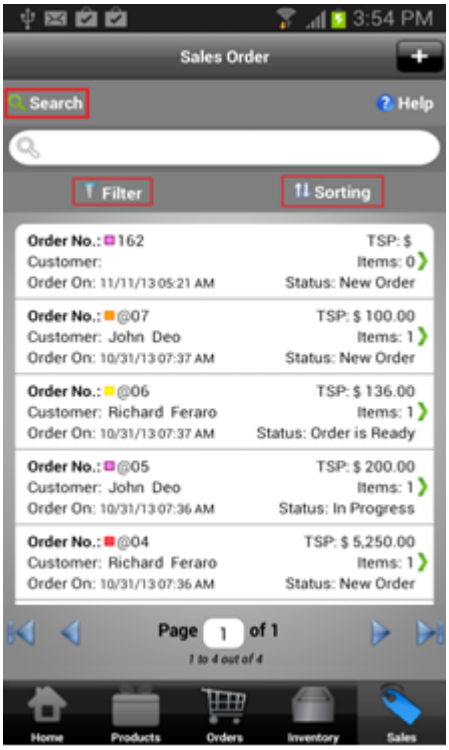


! Delete from "Device" will erase data only from your device & delete from "Device & server" will delete data from device as well as from web server.

Search/Filter/Sorting

1. Click on the "Search" icon given on top left corner of 'Sales Order' screen.
2. Search bar will be displayed.
3. Search/ Sort/Filter your sales order list using this feature.

Figure 77: Sales Search Page



Quick Sales

To enhance the power of barcode scanning and creating sales, a new feature has been introduced that allows a user to create sales order more quickly using iOS and Android mobile devices.

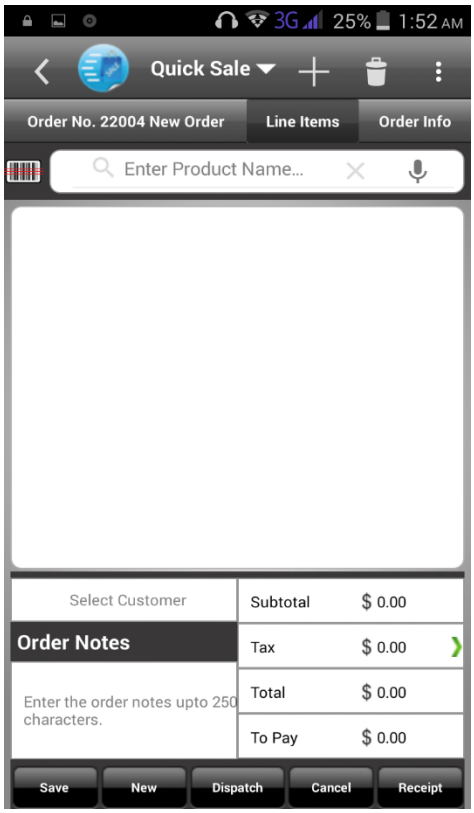
Figure: Quick Sale Option

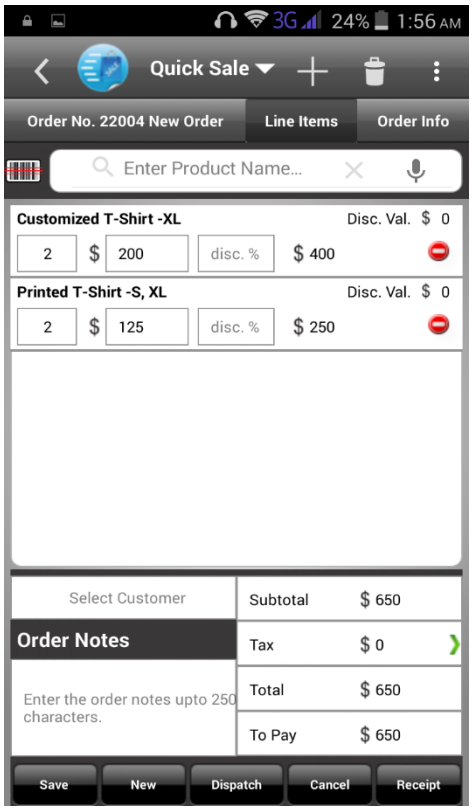
Create Quick Sale

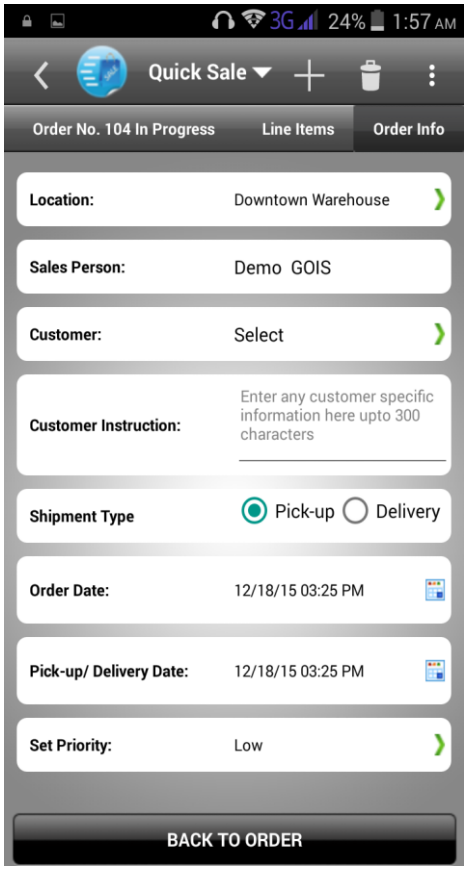
1. Steps for creating quick sale order:
2. From the home screen, tap on Quick Sales icon.
3. User will be navigated to ‘Quick Sale’ creation screen.
4. There are two tabs as Line Items and Order Info.
5. By default, you will be redirected to Line Items tab.
6. New order number will be generated automatically.
7. To add the items, tap on the search field given.

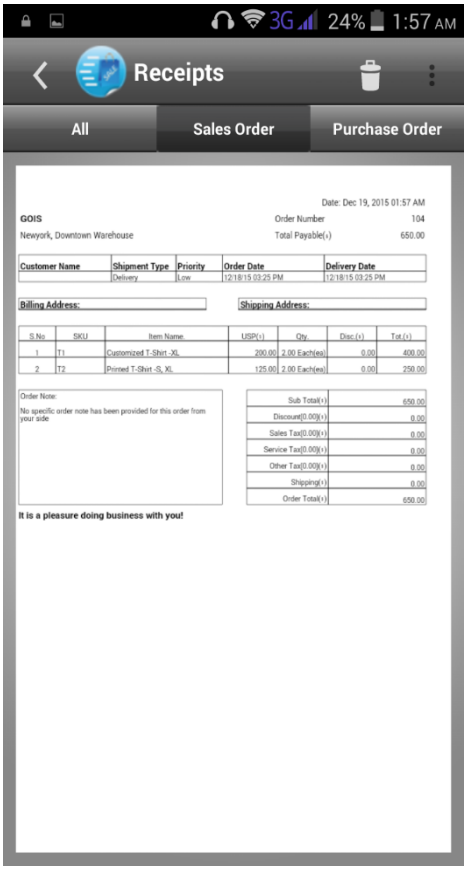
8. Here user has two options as either enter the product name/SKU# manually to search a product to be lined up in an order for sale or tap on barcode icon given adjacent to search field.
9. On tapping the barcode icon given adjacent to search field, device rear camera will be activated automatically.
10. Keep the camera horizontally over the barcode, the barcode will be captured and the corresponding product line will be populated.
11. If you like to search a product manually (without using barcode scanning feature), just type the product name or SKU number under the given search box.
12. Enter the quantity to be sold, modify the sale price (if necessary) and mention the discount (if applicable for a given product).
13. Line up any desired items in an order.
14. Choose the customer under 'Select Customer' field.
15. Enter order notes – if needed.
16. Hit 'Save' button given at the bottom under horizontal grid.
17. Now tap on 'Order Info' tab.
18. Provide necessary information as needed.
19. Once done, tap on 'Back to Order' bottom from bottom grid.
20. If user like to dispatch the order immediately, click on 'Dispatch' from bottom grid under 'Line Items' tab.
21. Hitting 'Cancel' will cancel the order.
22. Hitting 'Receipt' button will generate the receipt of an order.

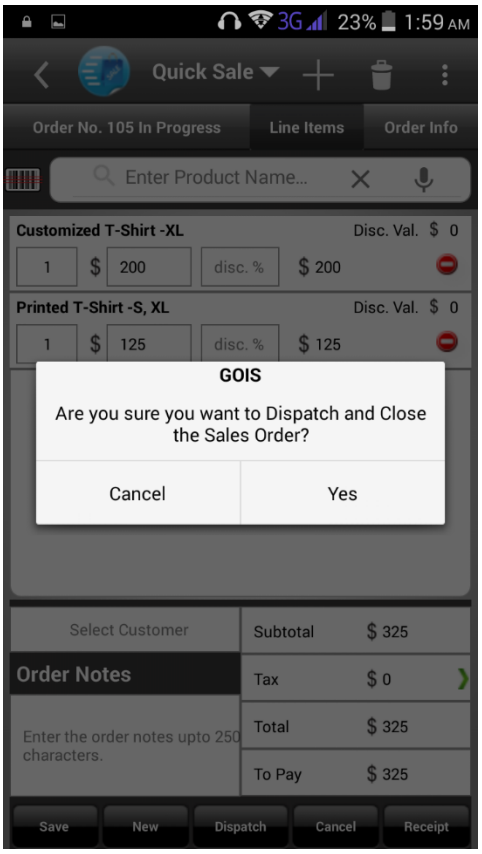
Quick Sale Screenshots

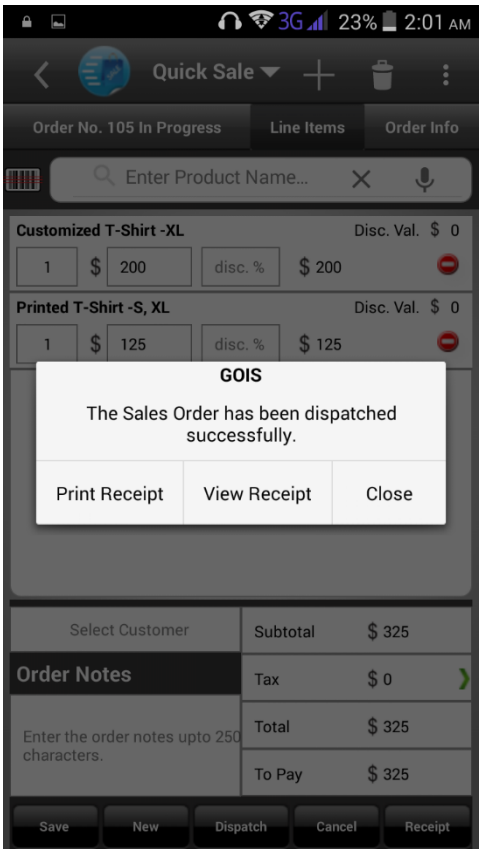








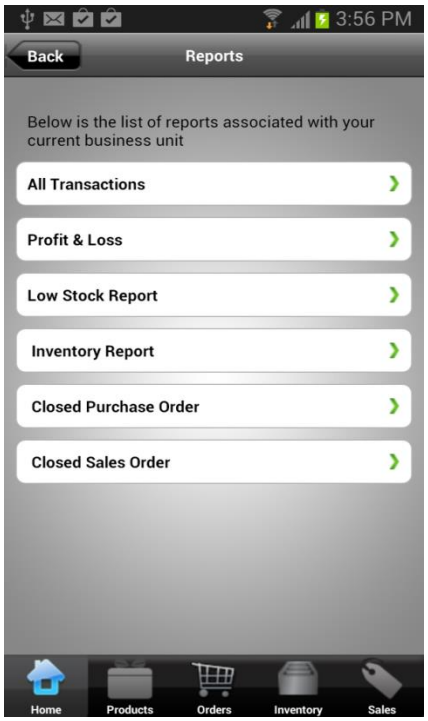




Reports

This section provides a comprehensive report analysis to all the device users. Users can access the report and mail the same to the desired email address to get it printed.

Figure 78: Goods Order Inventory Reports Page



All Transactions

Get a detailed report for all IN/OUT transactions made against different products resides under your inventory in a selected organization, business unit and location.

Mail:

Click on the 'Mail' to send this detailed report to desired email address.

Search/Filter/Sorting:

1. Click on the "Search" tab mentioned at top left corner of 'All Transactions' screen.
2. Search bar will be displayed.
3. Search/ Sort/Filter your transaction list using this feature.

Figure 79: All Transactions Mail Page

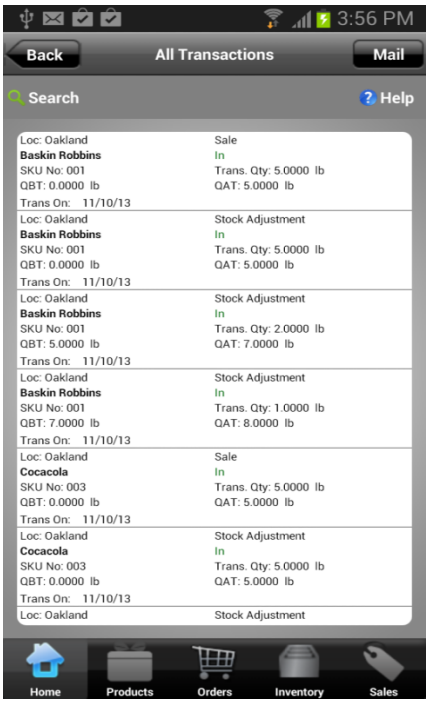
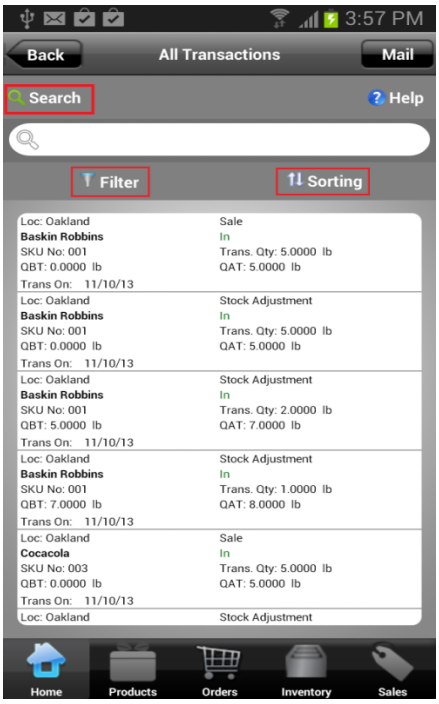


Figure 80: All Transactions Search Page



Closed Purchase Order

Get a detailed report of all the closed purchase orders made into the system/app in a given duration.

Mail:

Click on the 'Mail' to send this detailed report to desired email.

View Closed Order Items:

Click on any Purchase Order from the list to see the detailed information about a closed purchase order.

Search/Filter/Sorting:

1. Click on the "Search" tab mentioned at top left corner of 'Closed Purchase order' screen.
2. Search bar will be displayed.
3. Search/ Sort/Filter your order list using this feature.

Figure 81: Closed Purchase Order-Mail Page

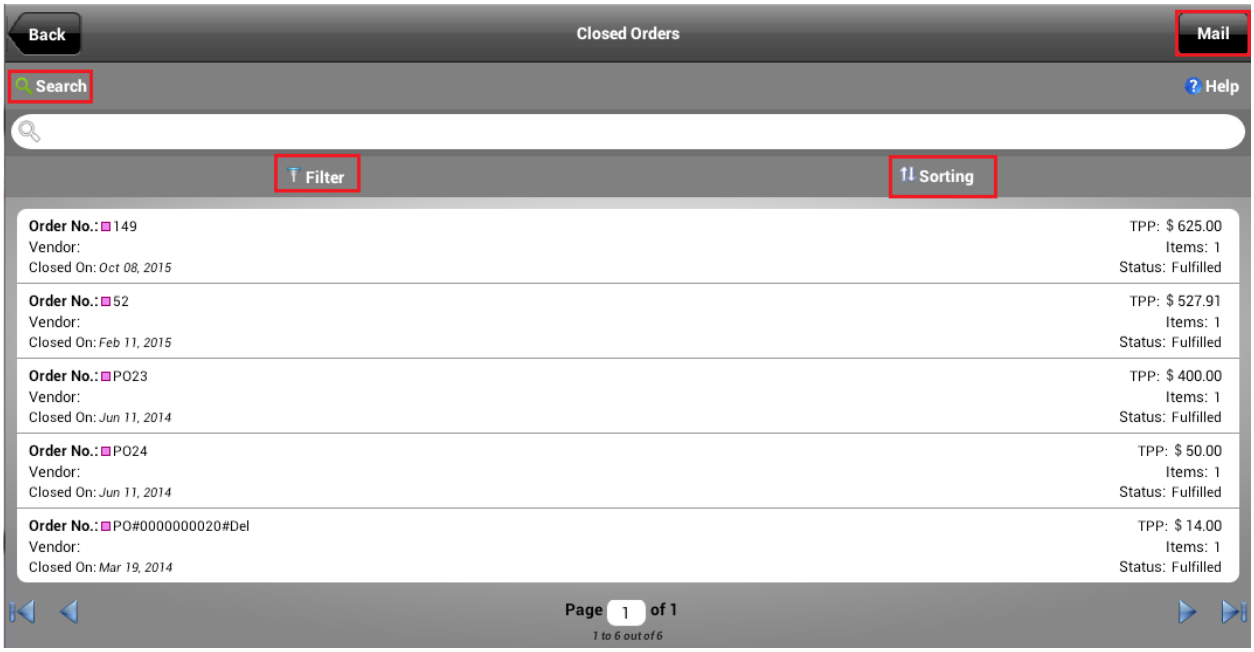
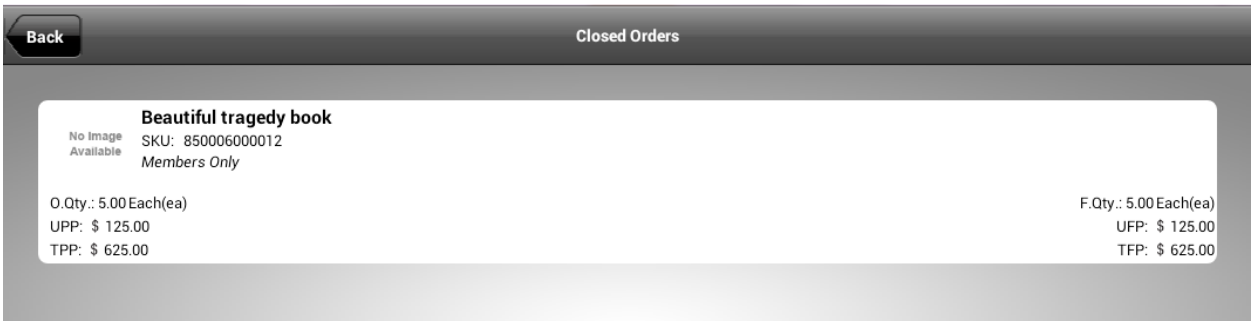


Figure 82: Closed Order - Line Items Page



Profit & Loss

Get a detailed report based on sales specific Profit/Loss to analyze your business performance.

Mail:

Click on the ‘Mail’ to send this detailed report to desired email.

Summary:

Tap on ‘Summary’ to check total direct sale and total sale using inventory.

Search/Filter/Sorting:

1. Click on the “Search” tab mentioned at top left corner of ‘Profit & Loss’ Screen.
2. Search bar will be displayed.
3. Search/ Sort/Filter the sales list using this feature.

Figure 83: Profit & Loss Report Page

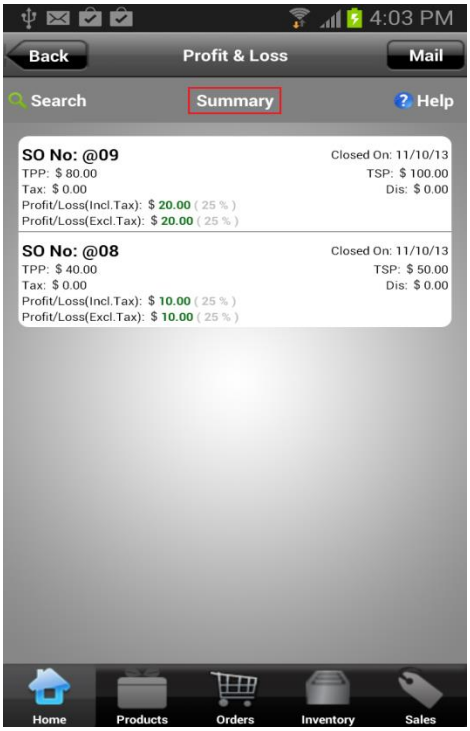
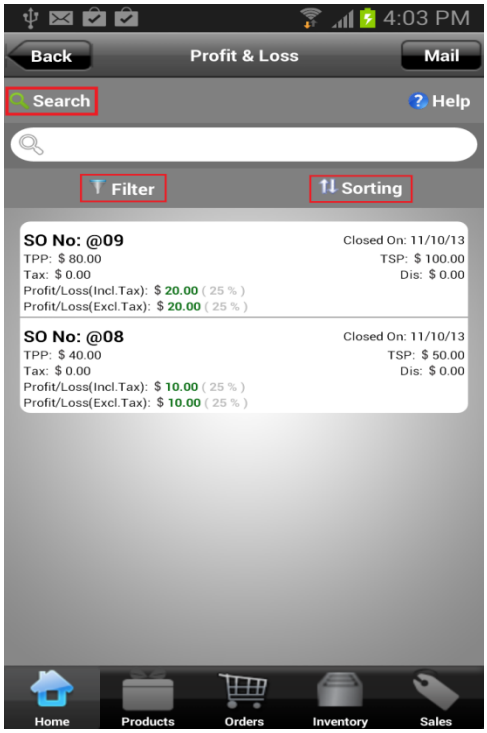


Figure 84: Profit & Loss Search-Sort Page



Closed Sales Order

This report contains the data of all the closed sales order made in a given duration for a selected Organization, Business Unit and Location.

Mail:

Click on the ‘Mail’ to send this detailed report to desired email.

View Sales Order Items:

Click on any Sales Order to see the detailed information about the line items contained.

Search/Filter/Sorting:

1. Click on the “Search” tab mentioned at top left corner of ‘Closed Sales Order’ Screen.
2. Search bar will be displayed.
3. Search/ Sort/Filter your order list using this feature.

Figure 85: Closed Sale Order Page

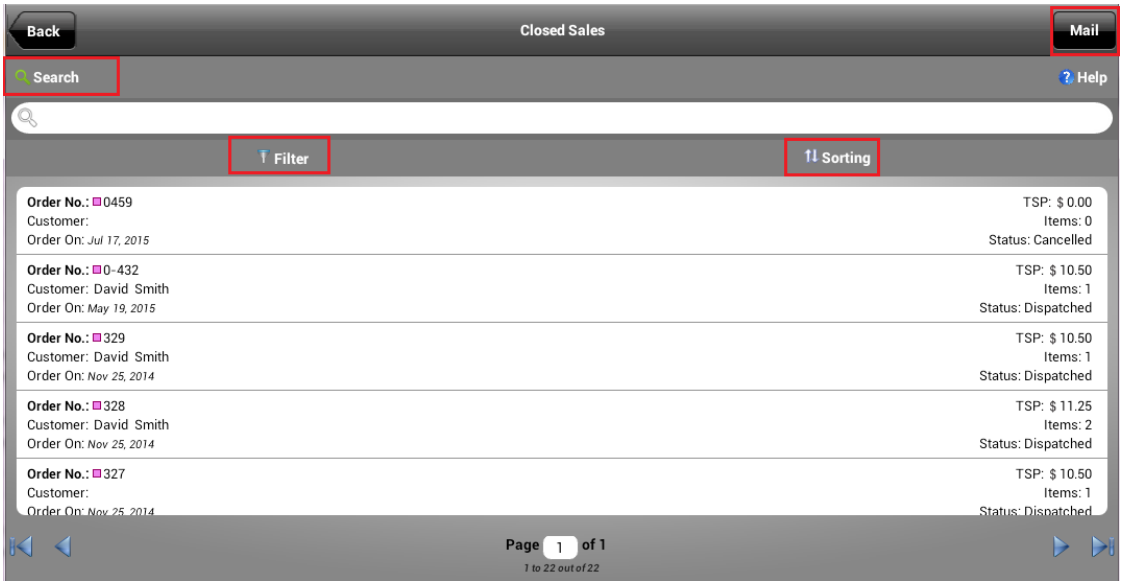
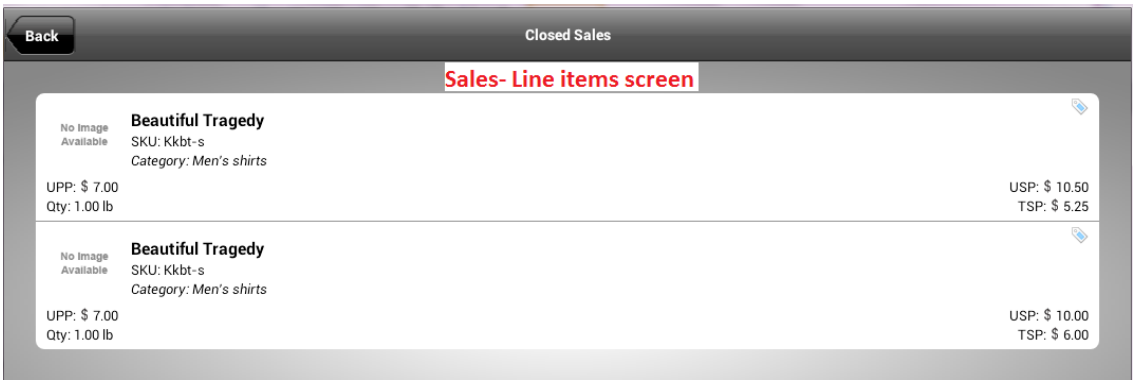


Figure 85.1: Sale Order – Line Items Page



Low Stock Report

This report displays all items which are available in inventory below its ‘Minimum Quantity’.

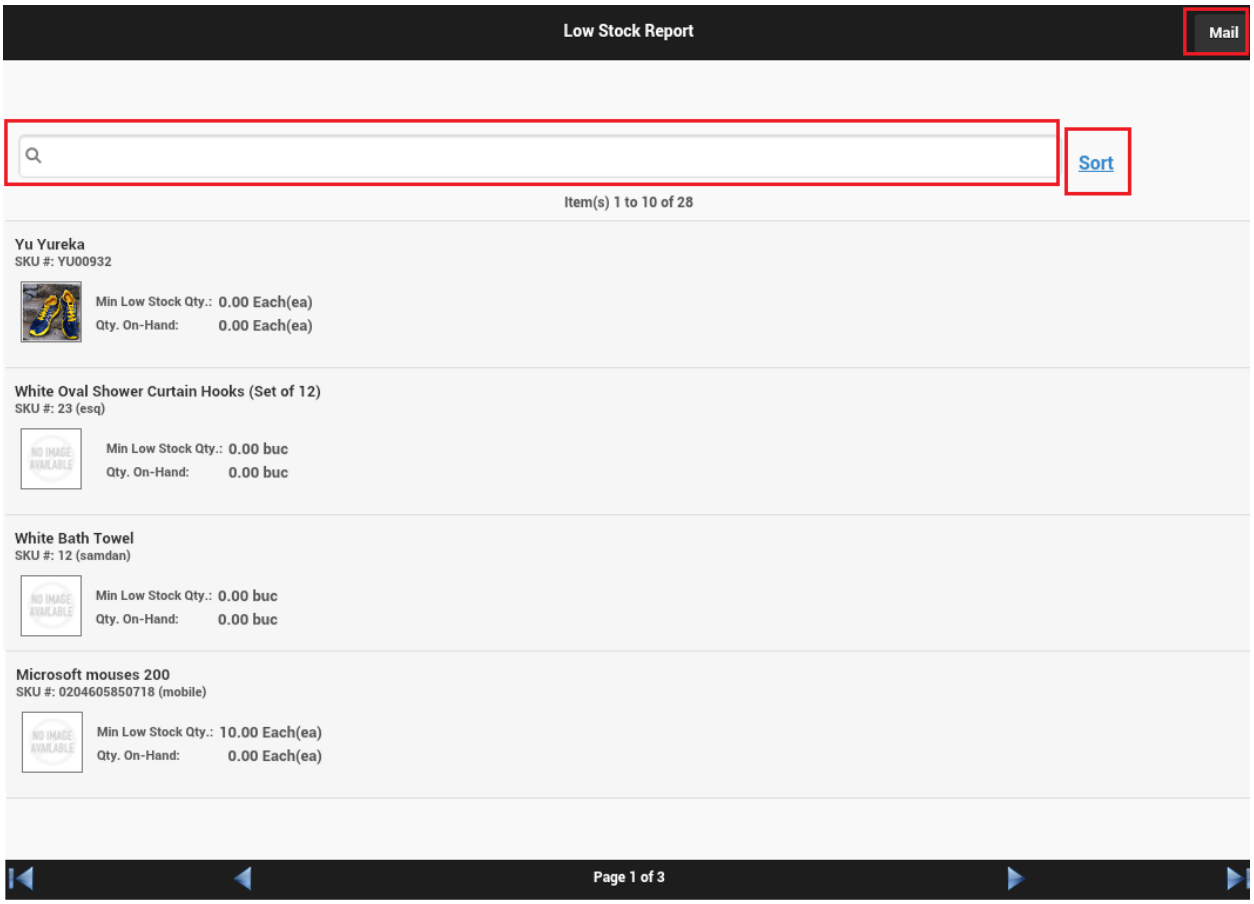
Mail:

Click on the ‘Mail’ to send this detailed report to desired email.

Search/Filter/Sorting:

1. Click on the “Search” tab under ‘Low Stock Report’ Screen.
2. Enter the search data.
3. Or sort your list using ‘Sort’ tab by selecting the desired criteria.

Page 86: Low Stock Report Page



Inventory Report

Get a list of items that exist in your inventory for desired location.

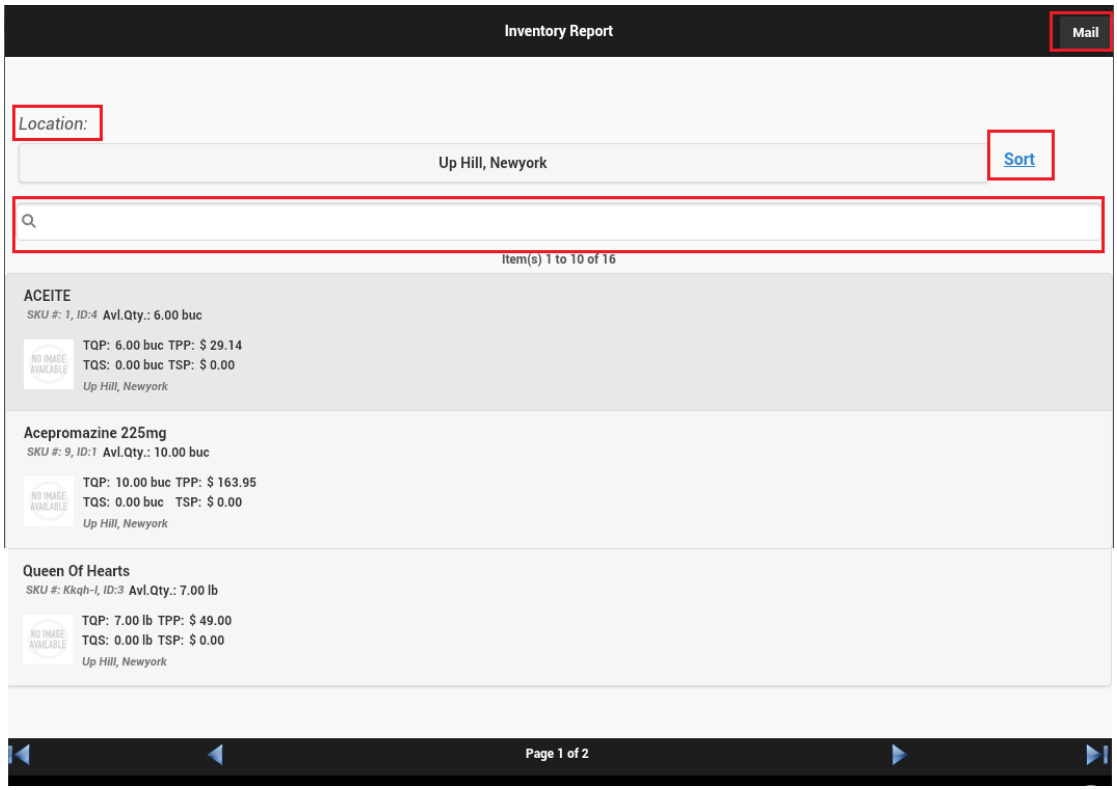
Mail:

Click on the ‘Mail’ to send this detailed report to desired email.

Search/Location Filter/Sorting:

1. Click on the “Search” tab given under ‘Inventory Report’ screen.
2. Provide the desired information to be searched.
3. Or Sort/Filter your inventory list as desired using ‘Sort’ link.
4. Or tap on ‘Location’ tab to choose the desired location.

Page 88: Inventory Report and Mail Page

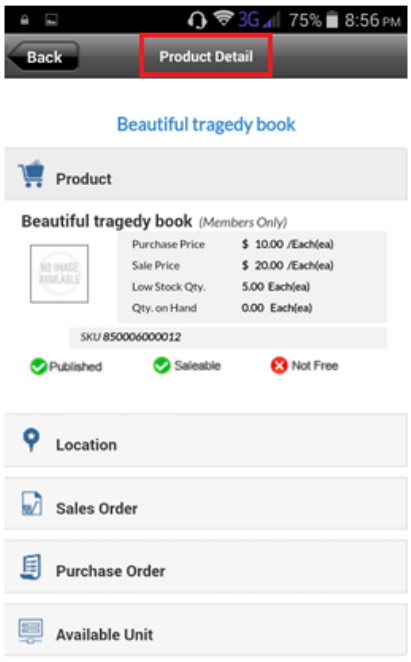


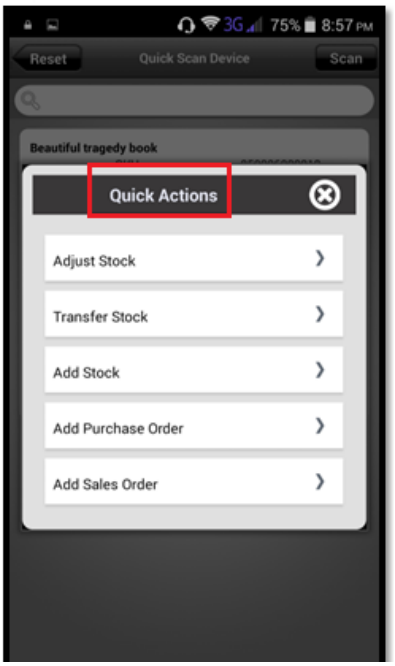
Quick Scan

Quick scan feature allows a user to scan the product barcode to check the quick stock information and to perform desired quick actions on your product data.

Quick Action

- Adjust Stock.
- Transfer Stock.
- Add Stock.
- Add Purchase Order.
- Add Sales Order.





Adjust Stock

1. Tap on the ‘Quick Scan’ button from ‘Home’ screen, user will be navigated to Quick Scan Device screen.
2. If you have a barcode associated with a product, click on the ‘Scan’ button given on top right corner of screen. On clicking, mobile rear camera will be activated for scanning. Scan the barcode by keeping the camera horizontally over the barcode.
3. Else enter the Product Name/Number under given search bar to search the product information.
4. After Scanning/Searching, product information will be populated for quick view.
5. Tap on the ‘Quick Action’ button to perform more operations on chosen product, a pop up window will appear.
6. Tap on Adjust Stock, you will be redirected to another page.

7. A list of stock will be displayed in this page related to a specific/selected location, tap on the location name to select different location or all locations.
8. After selecting the location all related stock of a given product will be displayed, tap on the "Enter ID" textbox to search for specific Stock ID.
9. Select the desired stock entry on which you want to do the stock adjustment.
10. On selecting, you will be navigated to another page under which you need to provide the necessary information related to adjustments.
11. Choose Adjustment Method from given tab, Enter Adjustment Quantity, Select Adjustment Reason and Enter Note.
12. Hit 'Apply' button.
13. After tapping on 'Apply' button, transaction will be completed.
14. Now user will be redirected to the adjustment detail page, this page contains "Do Another Adjustment" button user can tap on this for another adjustment.

Figure: Quick Scan Device Screen

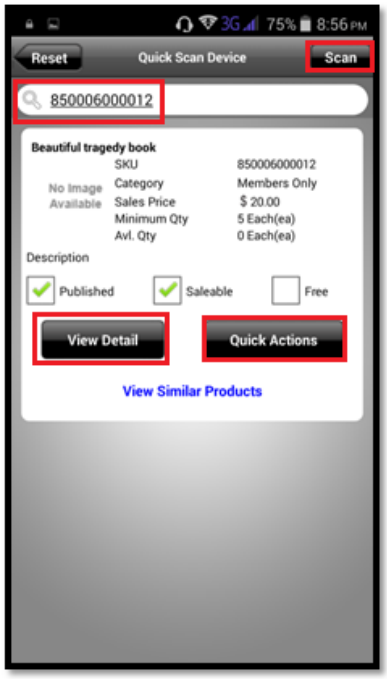


Figure: Quick Actions Pop-up Screen

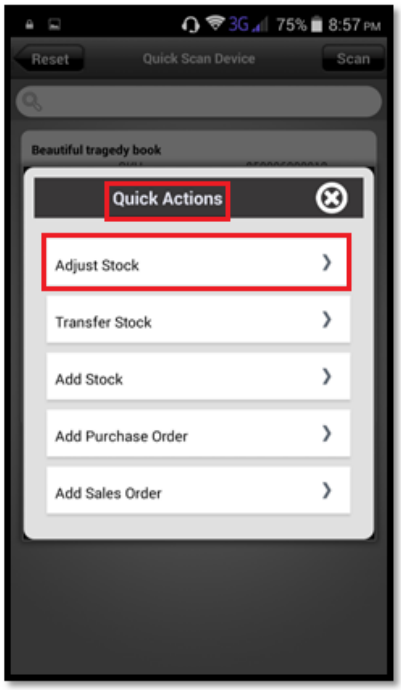


Figure: Stock Adjust – Select Stock

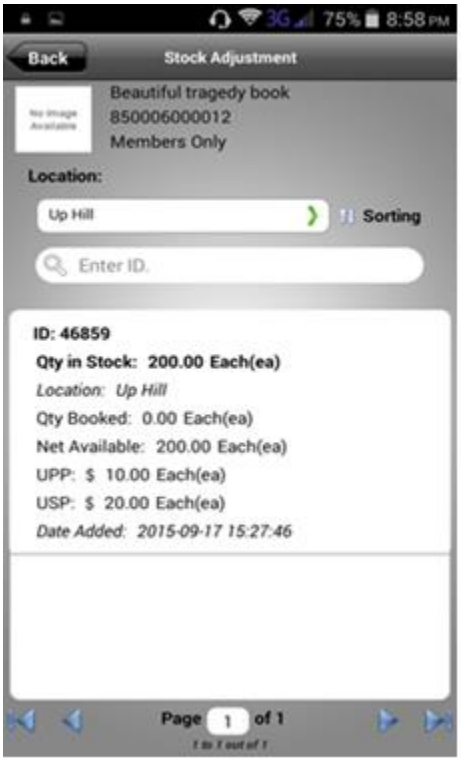


Figure: Stock Adjust – Adjustment Details

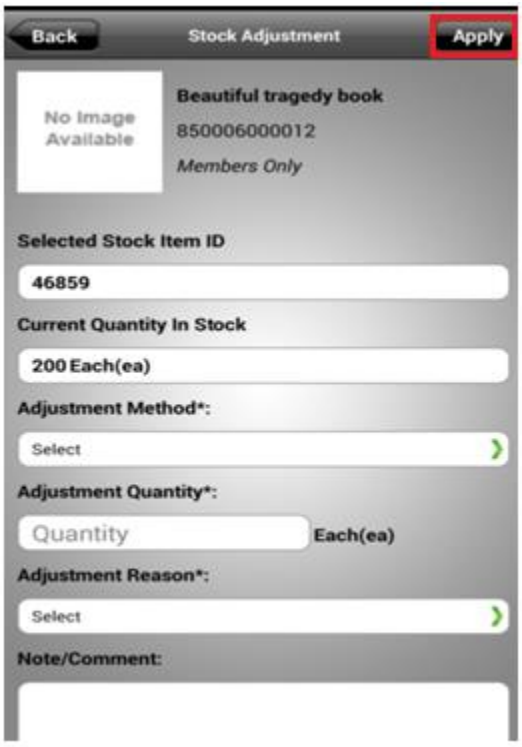


Figure: Stock Adjustment Transaction Report Screen

Transfer Stock

User may transfer a stock for a specific product from one location to another location using barcode scanning and searching feature.

1. Tap on the ‘Quick Scan’ button from ‘Home’ screen, user will be navigated to Quick Scan Device screen.
2. If you have a barcode associated with a product, click on the ‘Scan’ button given on top right corner of screen. On clicking, mobile rear camera will be activated for scanning. Scan the barcode by keeping the camera horizontally over the barcode.
3. Else enter the Product Name/Number under given search bar to search the product information.
4. After Scanning/Searching, product information will be populated for quick view.
5. Tap on the ‘Quick Action’ button to perform more operations on chosen product, a pop up window will appear.
6. Tap on Transfer Stock tab, you will be redirected to another page.
7. User will be redirected to another screen, provide source and destination location by tapping on the given fields respectively.
8. After selecting the locations, enter the product’s quantity to be transferred from source location to destination location.
9. Tap on the note/comment text area to provide the note or comment.
10. Tap on the apply button to complete the transaction. User will be redirected to the transfer detail page after successful transaction.

Figure: Quick Scan Device Screen

Figure: Quick Actions – Stock Transfer

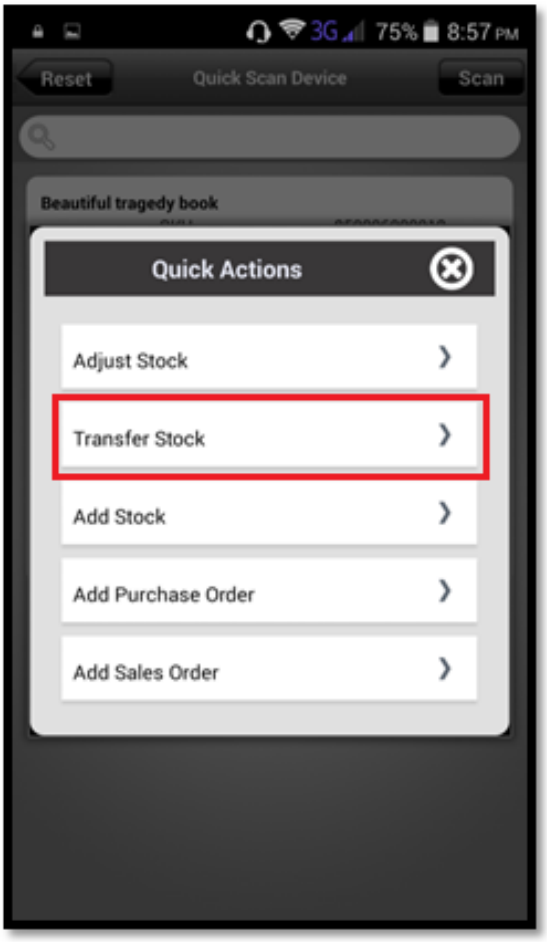


Figure: Quick Scan – Stock Transfer

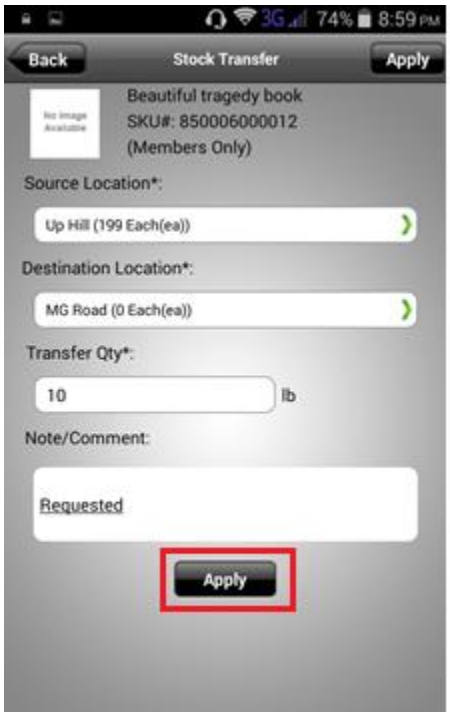


Figure: Quick Scan – Stock Transfer Report

Add Stock

User can directly add product quantity in a specific stock at using Quick Action button. You have to provide Unit Purchase Price, Unit Sale Price, and Quantity to perform this action.

1. Tap on the 'Quick Scan' button from 'Home' screen, user will be navigated to Quick Scan Device screen.
2. If you have a barcode associated with a product, click on the 'Scan' button given on top right corner of screen. On clicking, mobile rear camera will be activated for scanning. Scan the barcode by keeping the camera horizontally over the barcode.
3. Else enter the Product Name/Number under given search bar to search the product information.
4. After Scanning/Searching, product information will be populated for quick view.
5. Tap on the 'Quick Action' button to perform more operations on chosen product, a pop up window will appear.
6. Tap on Add Stock tab, you will be redirected to another page.
7. Provide Unit Purchase Price and Unit Sale Price (default prices will be populated automatically). If you don't want to change leave it unchanged.
8. Provide the quantity to add into the stock.
9. Fill the note field, this field is optional and user can also leave it blank.
10. Tap on the save button.

Figure: Quick Scan Device Screen

Figure: Quick Actions – Add Stock

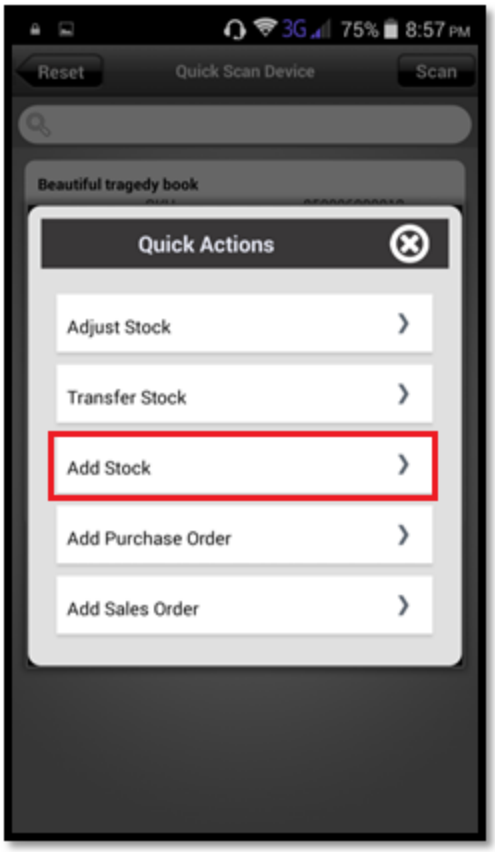
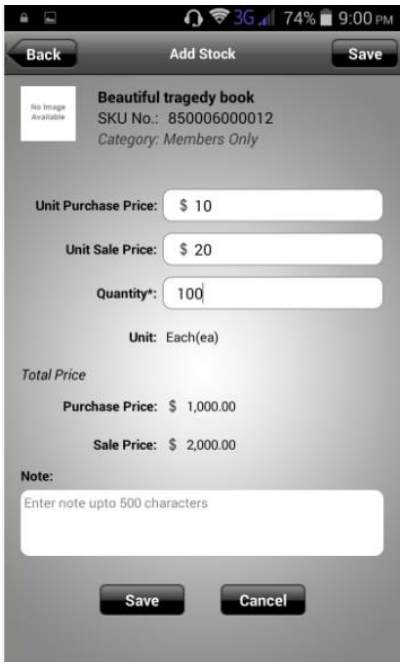


Figure: Quick Scan – Add Stock



Add Purchase Order

User can raise purchase order directly by using Quick Scan feature. To raise a new purchase order user needs to tap on the "Add Purchase Order" tab under Quick Actions.

1. Tap on the 'Quick Scan' button from 'Home' screen, user will be navigated to Quick Scan Device screen.
2. If you have a barcode associated with a product, click on the 'Scan' button given on top right corner of screen. On clicking, mobile rear camera will be activated for scanning. Scan the barcode by keeping the camera horizontally over the barcode.
3. Else enter the Product Name/Number under given search bar to search the product information.
4. After Scanning/Searching, product information will be populated for quick view.
5. Tap on the 'Quick Action' button to perform more operations on chosen product, a pop up window will appear.
6. Tap on Add Purchase Order tab, you will be redirected to another page.
7. Provide Unit Purchase Price (default product purchase price will be populated automatically).
8. Enter the quantity under 'Quantity' field.
9. Total Purchase price will automatically get calculated.
10. After providing the Note (optional), tap on the 'Save' button at the top right corner of the screen.
11. After successful transaction, an order pop up will be displayed showing PO number and status.

Figure: Quick Scan Device Screen

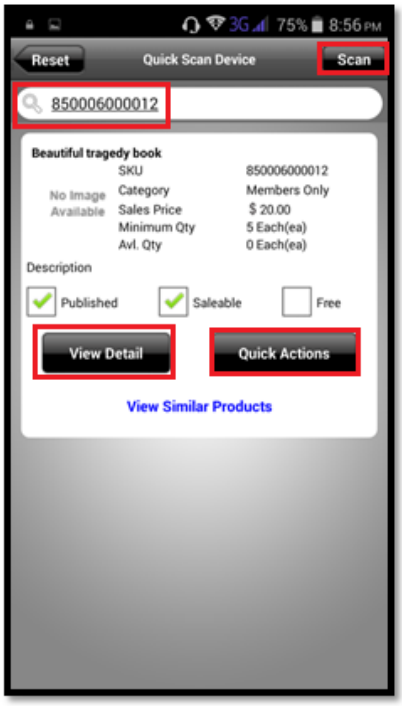


Figure: Quick Actions – Add Purchase Order

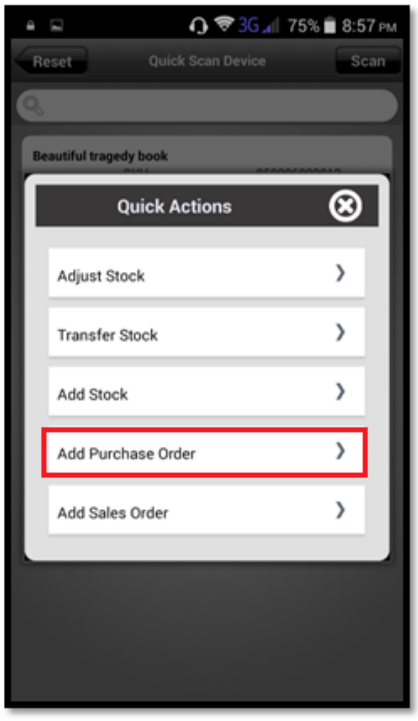


Figure: Quick Scan – Add Purchase Order

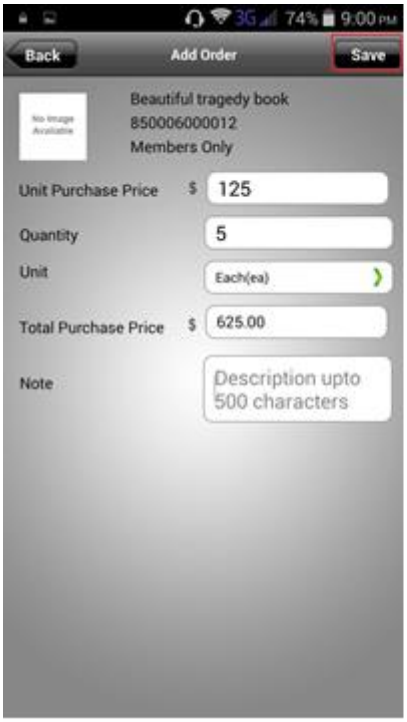
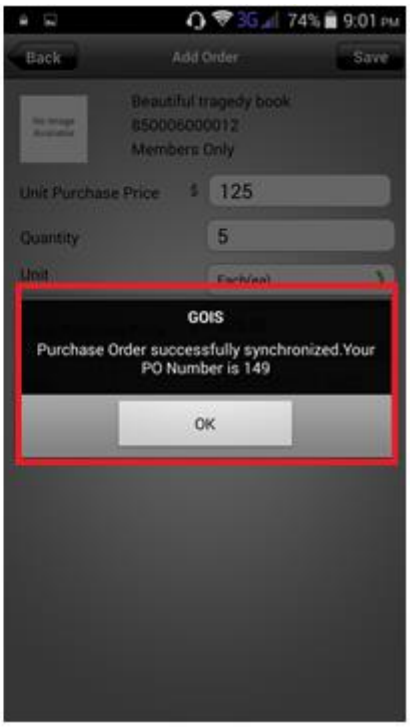


Figure: Quick Scan – Order Confirmation



Add Sales Order

User can punch a sales order for a specific product directly by using the Quick Scan feature. To punch a new sales order user needs to tap on the "Add Sales Order" field.

1. Tap on the 'Quick Scan' button from 'Home' screen, user will be navigated to Quick Scan Device screen.
2. If you have a barcode associated with a product, click on the 'Scan' button given on top right corner of screen. On clicking, mobile rear camera will be activated for scanning. Scan the barcode by keeping the camera horizontally over the barcode.
3. Else enter the Product Name/Number under given search bar to search the product information.
4. After Scanning/Searching, product information will be populated for quick view.
5. Tap on the 'Quick Action' button to perform more operations on chosen product, a pop up window will appear.
6. Tap on Add Sales Order tab, you will be redirected to another page.
7. Provide Unit Sales Price (default product Sales price will be populated automatically).
8. Enter the quantity under 'Quantity' field.
9. Enter the discount - if applicable (optional).

10. Provide a note (optional) and tap on the “Save” button at the top right corner of the screen.

Figure: Quick Scan Device Screen

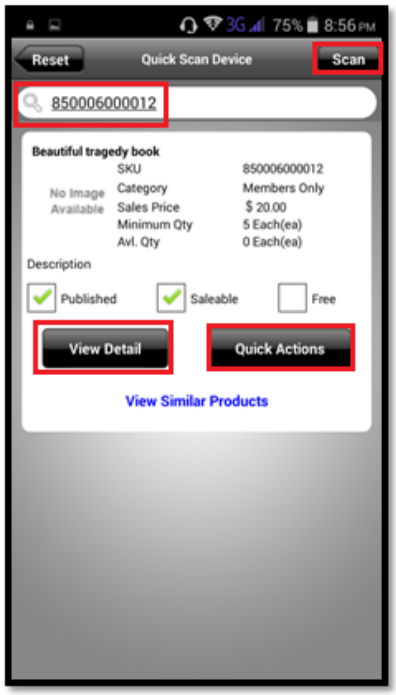


Figure: Quick Actions – Add Sales Order

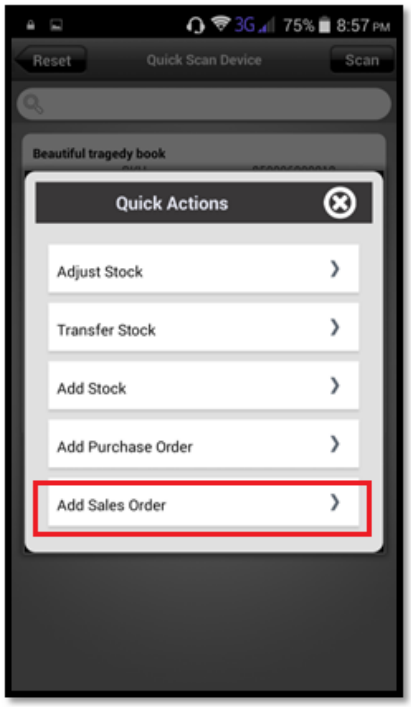


Figure: Quick Scan – Add Sales Order

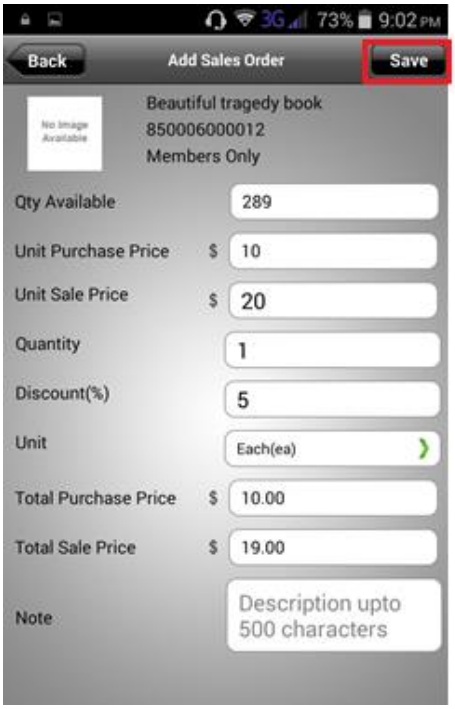
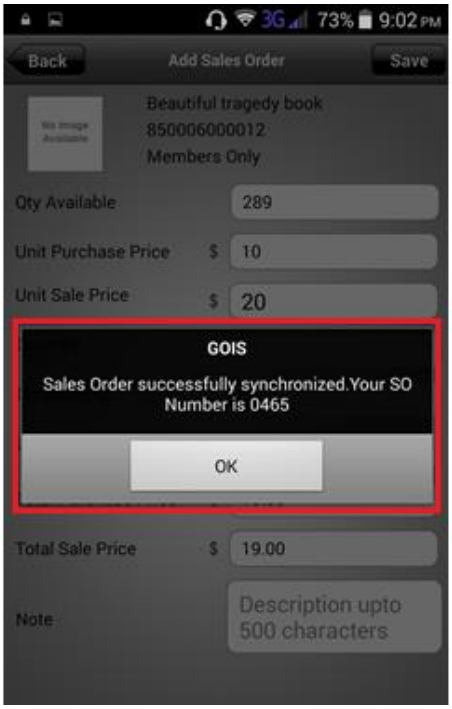


Figure: Quick Scan – Order Confirmation

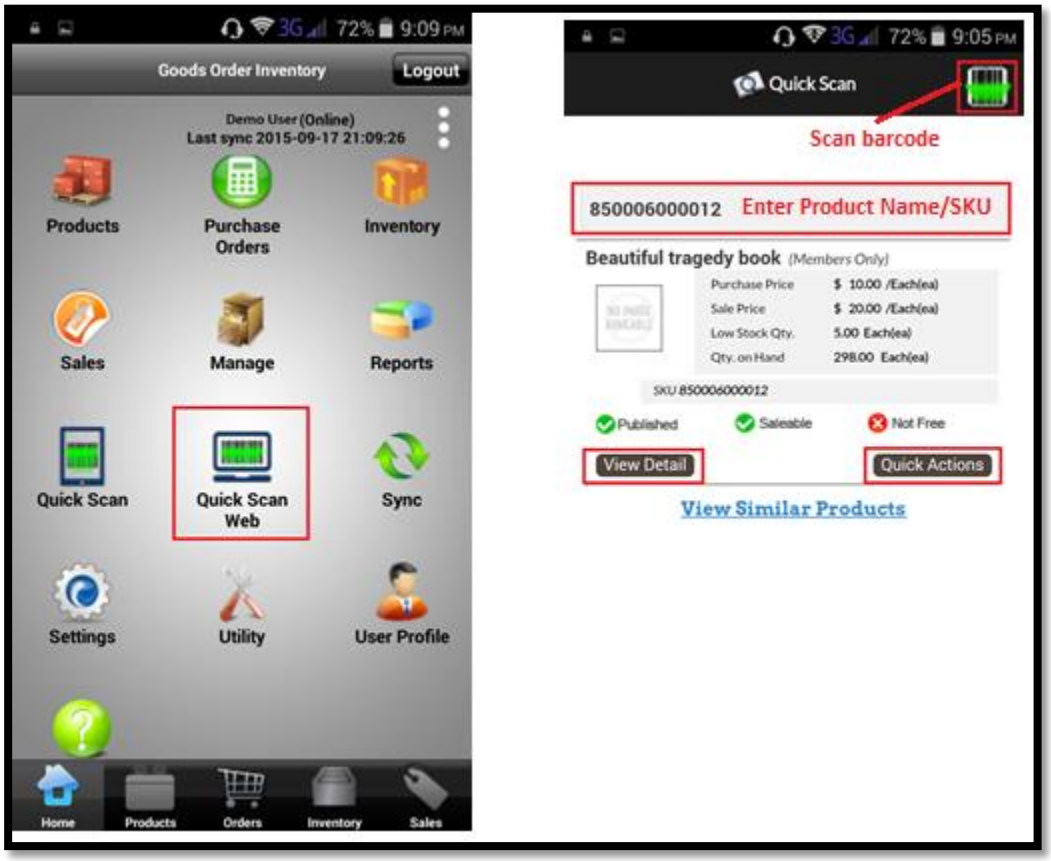


Quick Scan Web

"Quick Scan Web" feature allows a user to scan the product that has been saved on the web server and perform different quick actions on the product directly. This feature works in online mode of the mobile application as it has to fetch data from the web server. To avail this feature, user needs to tap on the icon with the name "Quick Action Web". After tapping on this icon user will be asked to sync the data with web server, choose yes for data syncing and then you will be redirected to another page contains a 'Search Box' and 'Scan Icon'.

Under the search box, user needs to provide either the SKU/Product number or the Product Name and accordingly product information will be populated.

If you have mapped the barcode with a product, you may tap on barcode icon given on top right corner of the screen to activate your mobile rear camera for scanning. Keep the mobile camera horizontally over the barcode, once barcode will be detected, corresponding product information saved into the GOIS server will be populated automatically.



View Detail

When the user types the SKU or the Product Name in the search box, the product matching the values given in the box will be appeared with product basic information. User can tap on the View Detail button to get all the detailed information about the specific product with single tap.

Product

Product tab under Product Detail page provides the general product information and Inventory stock information.

- Product Image
- Purchase Price
- Sale Price
- Low Stock Qty
- Qty on Hand
- SKU

Location

Location tab allows you to check the Available Stock and Qty Booked for a scanned barcode/ product available at different locations/warehouses.

Details provided in this section are:

- Name
- Available Stock
- Qty. Booked

Sales Order

This tab provides the details about all the sales order with respect to the specific product.

Details provided in this section are:

- Order No
- Customer
- Qty. Booked

Purchase Order

This section provides the details about all the purchase order that has been raised with respect to the specific product.

Details provided in this section are:

- Order No
- Vendor
- Quantity

Available Unit

GOIS system provides user a freedom to select the predefined measuring units or to create the user defined unit to measure the specific product in the system. This tab allows you to check the mapped measurement units for a specific product.

Details provided in this section are:

- Unit
- Default Purchase Unit
- Default Sale Unit

View Detail-Screenshots

Figure: Product Detail – Product Tab

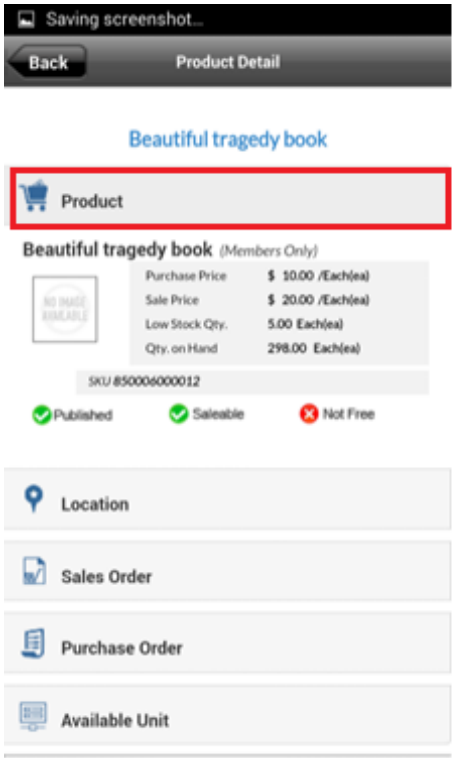


Figure: Product Detail – Location Tab

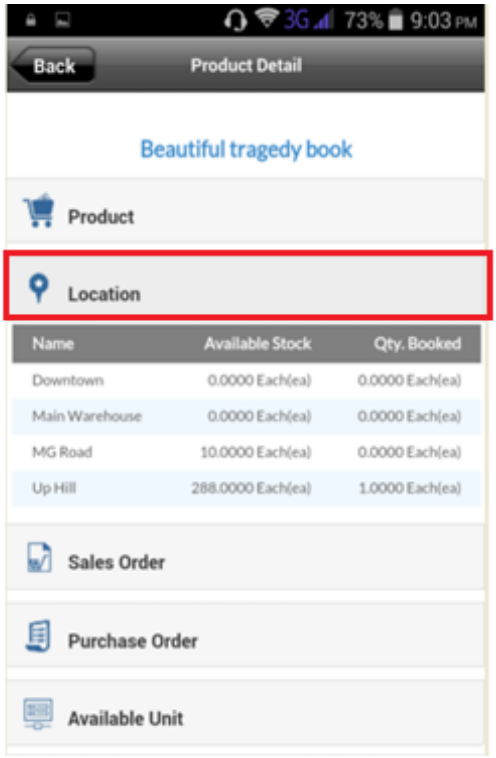


Figure: Product Detail – Sales Order Tab

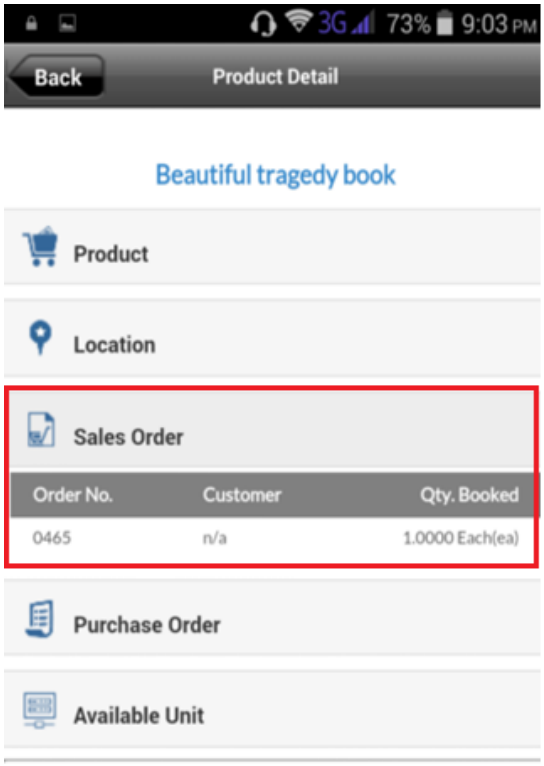


Figure: Product Detail – Purchase Order Tab

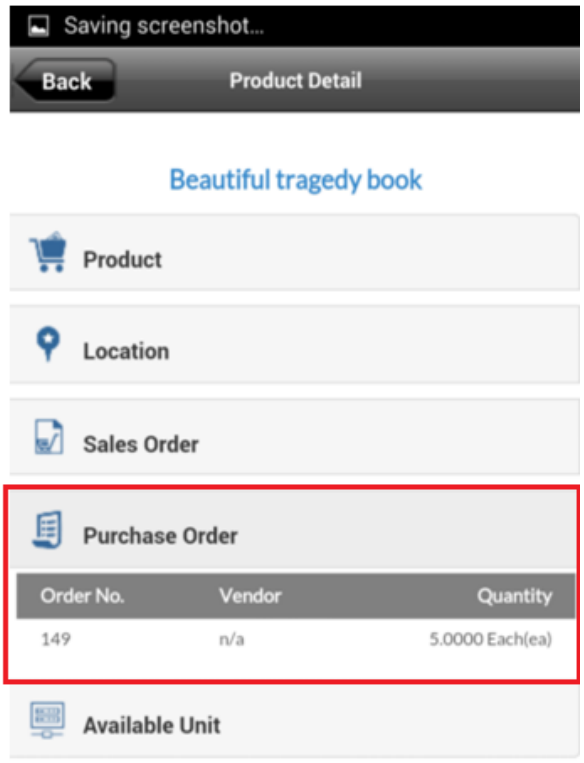
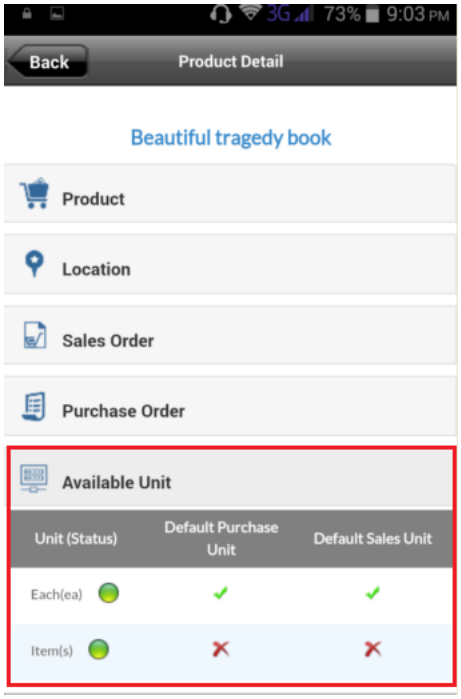


Figure: Product Detail – Available Unit Tab



Quick Actions

When a user provides the SKU/Product Number or the Product Name in the search box or scans a product barcode under Quick scan web page, the product with the matching values appears below the search box and a Quick Action button will appear to allow you to perform different operations on web data directly.

After tapping on 'Quick Action' button, a pop-up will appear with three different options to perform different actions on a given product.

1. Adjust Stock
2. Transfer/Import Stock
3. View Product detail

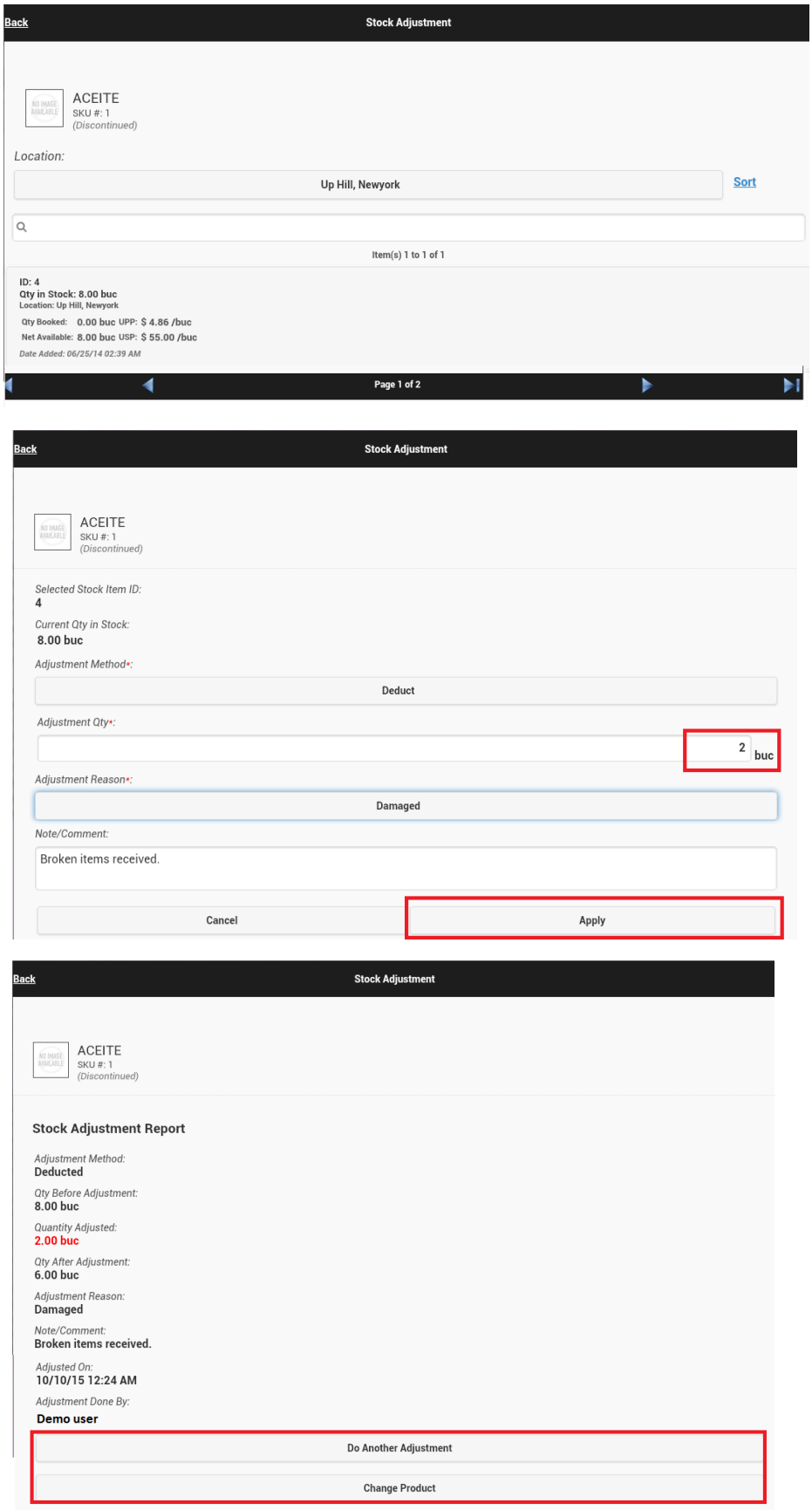
Adjust Stock

GOIS allows a user to make necessary stock adjustments in a location/warehouse against damaged, missing, stolen and returned items.

Steps to make Stock Adjustments in a location:

1. Under the 'Quick Action' popup, tap on Stock Adjustment tab.
2. Now system will check whether the data is synchronized with web server or not and will prompt to sync the data. Choose Yes for data syncing.
3. A list of selected product stock will be displayed for a default location, tap on the location name field to select some other location or all locations.
4. After selecting a location, all related stock entries of a selected product will be filtered out, tap on "Enter ID" textbox to search for the specific stock ID.
5. Select a stock entry to be adjusted.
6. Provide Adjustment method, Adjustment Qty, Adjustment reason, Adjustment note and hit 'Apply' button.
7. System will prompt a popup message for the confirmation, say Ok.
8. Now a successful message will be shown to the user, say OK.
9. Tapping on the Ok Button will redirected to another page showing the details related to the adjustment, this page also contains a "Do Another Adjustment" button user can tap on this for more transactions.

Figure: Quick Scan Web – Quick Action – Stock Adjustment for a selected product

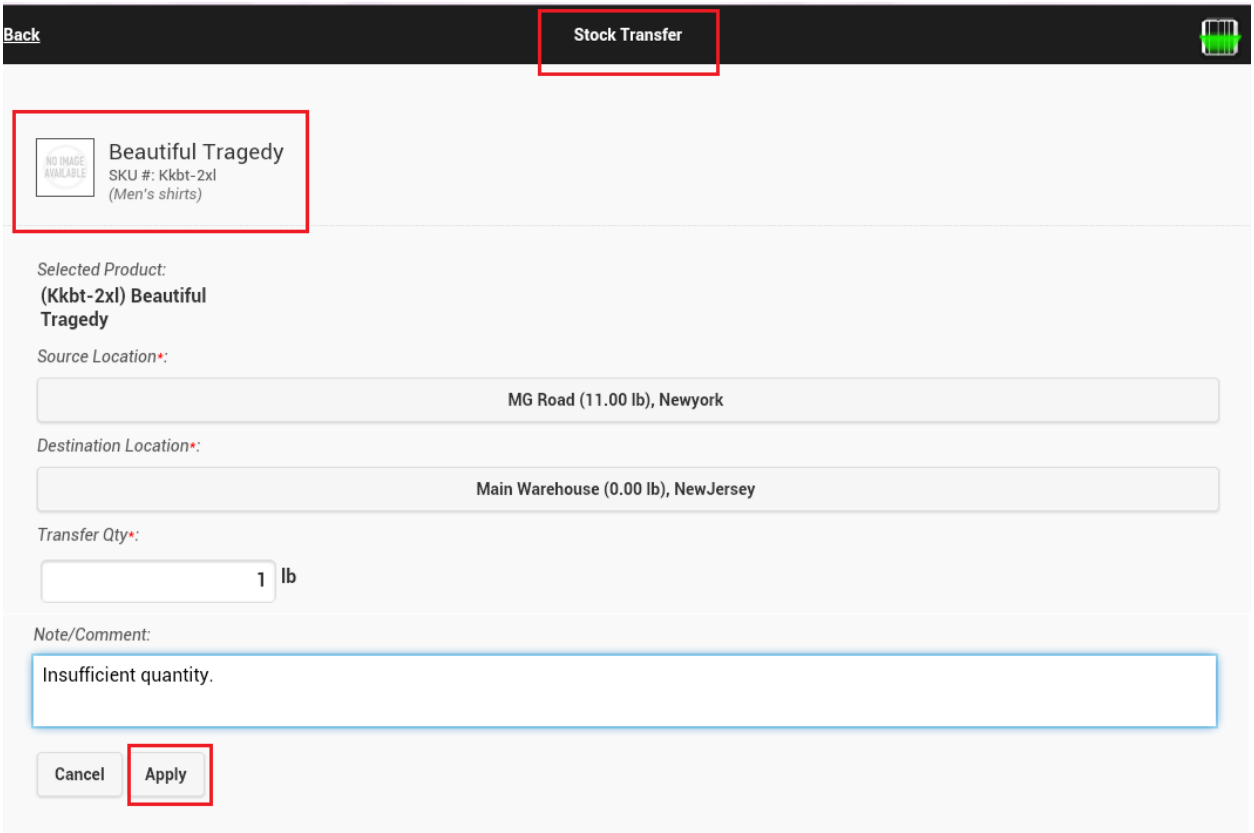


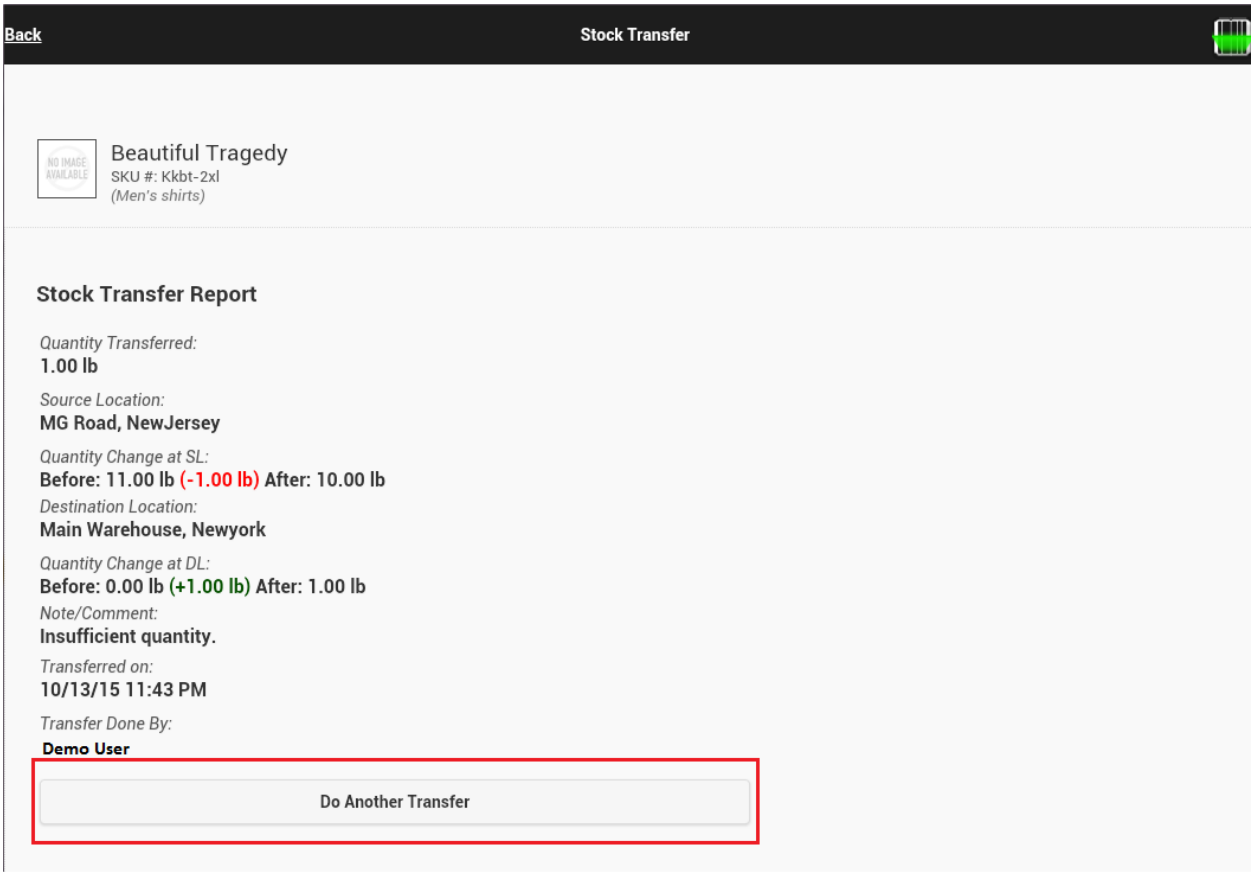
Transfer/Import Stock

GOIS allows user to make necessary stock transfer from one location to another.

Steps to Transfer Stock from one location to another location:

1. Under the ‘Quick Action’ popup, tap on Stock Transfer tab.
2. Now system will check whether the data is synchronized with web server or not and will prompt to sync the data. Choose Yes for data syncing.
3. Now, system will be navigated to ‘Stock Transfer’ screen having a list of inventory items for the selected location. User may change the source location by selecting the given ‘Location’ field on the page.
4. Select a product you want to transfer from selected source location and you will be navigated to product detail page (Stock Transfer).
5. Provide the ‘Destination Qty’, Qty. to be transferred and Transfer Note.
6. Click on Apply to process the transfer from ‘Source’ location to ‘Destination’ location.
7. System will generate a pop-up asking for the user confirmation to perform this action. Tapping on Ok button will create a new pop-up showing the success message of the transfer with details.





View Product Details

User can have a look on all the details related/associated with a selected product. Refer View Detail section for more information.

Settings

Manage and customize your mobile application settings as per your business needs.

Download Settings

Click on this icon to download the latest settings and updates from GOIS-PRO web server created under your account.

General Settings

This section provides general information pertaining to organization and other geographical information related to client's site.

Organization:

Select the desired 'Organization' with which you want to work in your mobile application.

1. Click on given tab 'Organization'.
2. Select the Organization you want to work with.

Business Unit:

On the basis of selected 'Organization', Business Unit list will be populated for further selection.

1. Click on given tab 'Business Unit'.
2. Select the business unit you want to work with under your chosen organization.

Location:

Using this tab, choose a desired warehouse location you want to work with.

Unit:

Set the default measurement unit. User will be given an option to choose either 'English' or 'Metric' as the default measurement unit type.

1. Click on given tab 'Unit'.
2. To change default unit, click on default unit
3. A unit list will be populated.
4. Select a desired default unit.

Currency:

Manage your currency system under this tab.

- Currency will be displayed automatically; on the basis of defined organizational settings under web account.
- You can change the currency only from your “GOIS Pro web” account.

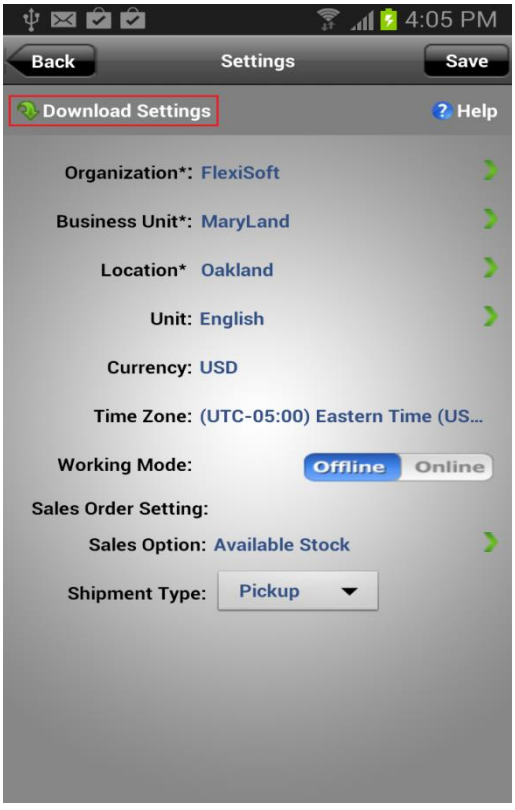
Time-Zone:

Time-Zone will be displayed on the basis of user profile settings defined under web account.

Working Mode:

1. Online mode: Synchronize your data with web server on real time.
2. Offline mode: Access and manage your account in offline mode without synchronizing it to web.

Figure 90: Settings Page



Sales Order Settings:

Set rules for stock adjustment and goods shipment management. Under this tab, a user has to choose all the information related to product/inventory sales.

1. Sale Option: Select the best sales option which suites your business inventory requirements.

- *Available Stock:* It will allow user to sell the selected product from the combined/total available stock list available in a warehouse/location. Stock adjustment rule will be applied to this type of sales. You can either select FIFO or LIFO based on your inventory maintenance needs.
- *Available Stock Entries:* This option allows users to sell from the individual stock entries against a given product available at a selected location.
- *Product List:* Sell your goods directly from the product list without using the inventory.

Figure 91: General Settings Page

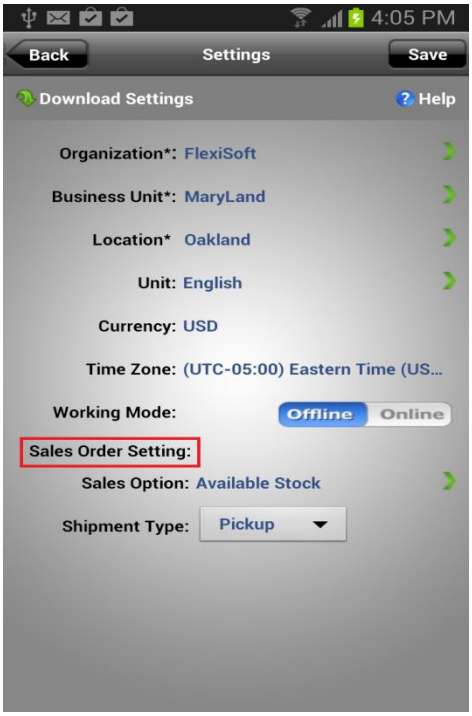
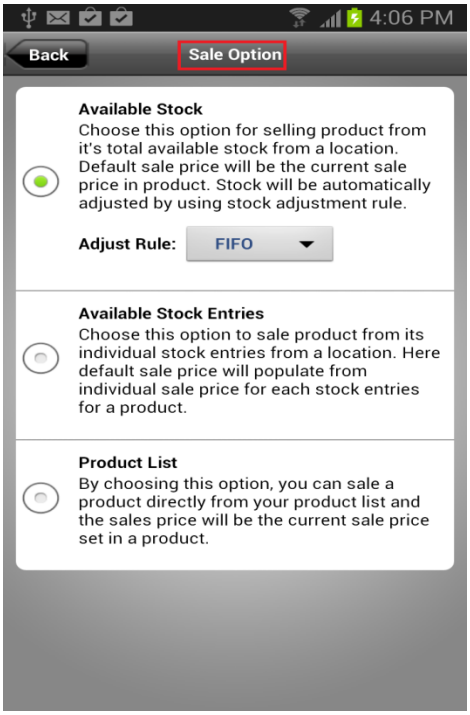


Figure 92: Sale Option Page



2. Default Shipment Type: This option allows user to choose the default shipment mode for your sales orders. You have an option to choose either 'Delivery' or 'Pickup' mode as per your business requirement.
3. Click on 'Save' button to save the settings.
4. You will be automatically redirected to 'Home' screen' of GOIS-Pro after successful completion of setting process.

Sync

Synchronize your data seamlessly between mobile device and web server.

Figure 93: Goods Order Inventory Page-Sync

Settings

Manage and customize the network and download settings for synchronization.

1. Click on the '*Sync'* icon mentioned on 'Home' screen.
2. Click on the 'Setting' button given on the top right corner of 'Sync' screen.
3. Choose desired 'Network settings' to download or upload the data.

Network Settings:

- *Sync using WI-FI only:* User can synchronize the data only when device is connected with WI-FI network.
- *Sync using WIFI and Career:* This option lets user to synchronize the data with both WI-FI as well as Carrier data mode.

Download Options:

- *Change after Last Sync:* This setting will download all the web data available after last synchronized date.
- *Changes after Specific Date:* This option allows user to download all the web data after a specified date.

Figure 94: Synchronize Setting Page

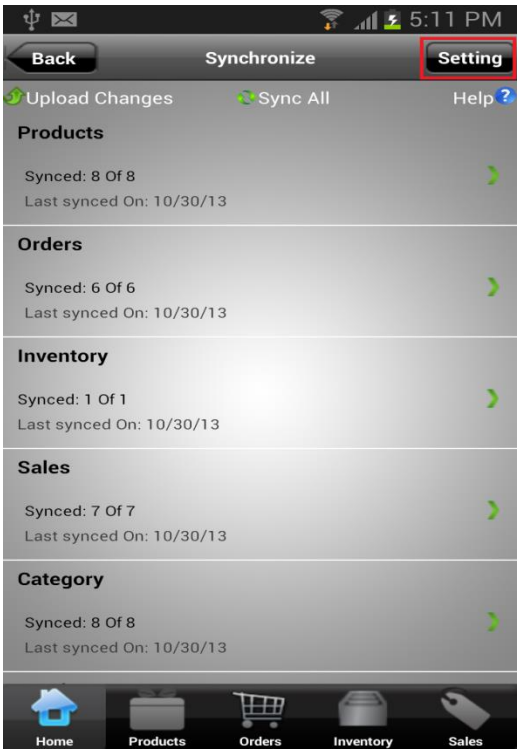
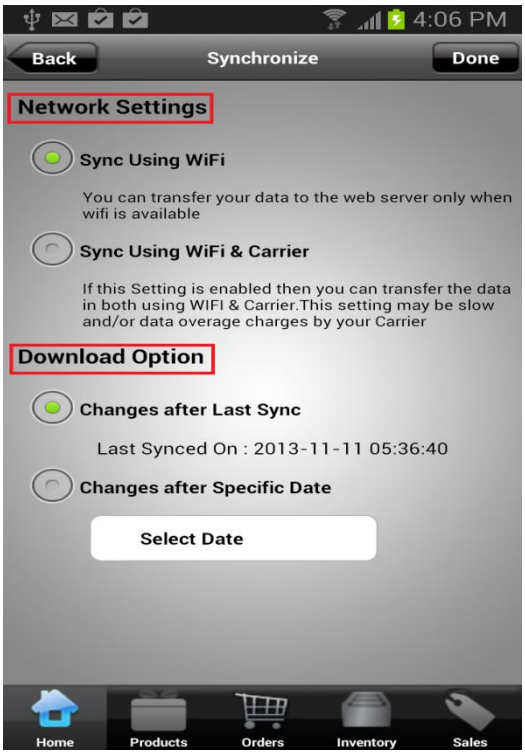


Figure 95: Network Settings Page



Sync All

Download/Upload all the data in between web server and mobile device app to maintain data consistency against the new changes across all the platforms/users.

1. Click on the '*Sync'* section mentioned on 'Home' screen.
2. Click on the given icon 'Sync All'
3. Data will get synchronized.

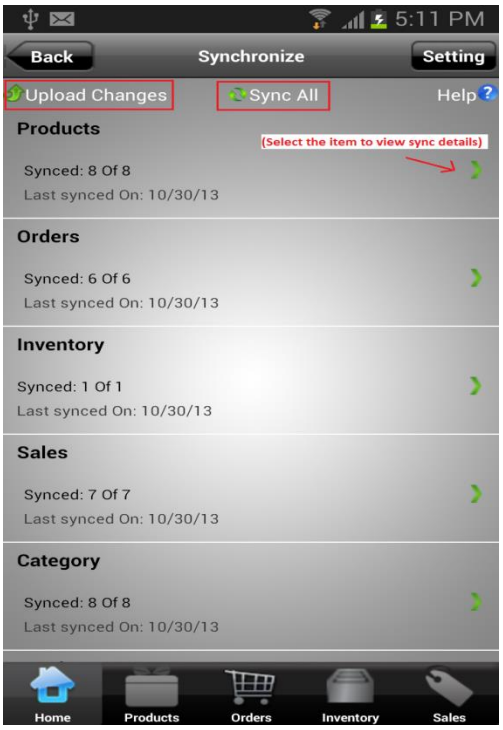
! In case of conflicted data, device data will be updated as per the web server data.

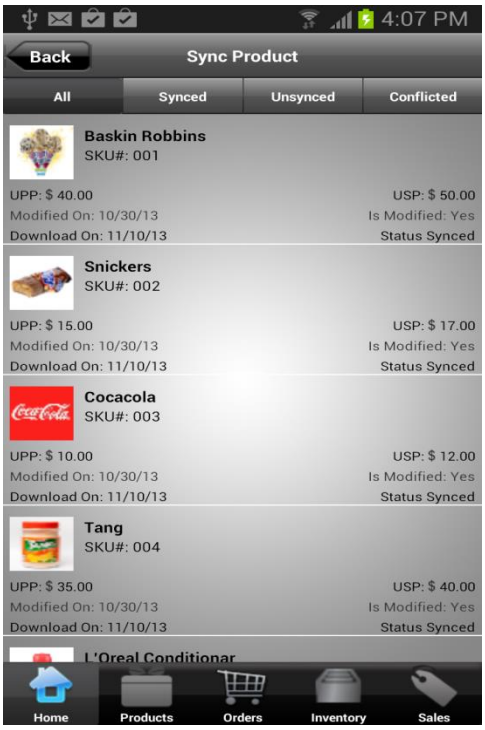
Upload

1. Click on the '*Sync'* icon mentioned on 'Home' screen.
2. Click on the 'Upload Changes' tab.
3. Any modification done on device gets uploaded into web server.

Figure 96: Synchronize Setting Page

Figure 97: Network Settings Page


5:11 PM
Back
Synchronize
Setting
Upload Changes
Sync All
Help
Products
(Select the item to view sync details)
Synced: 8 Of 8
Last synced On: 10/30/13
Orders
Synced: 6 Of 6
Last synced On: 10/30/13
Inventory
Synced: 1 Of 1
Last synced On: 10/30/13
Sales
Synced: 7 Of 7
Last synced On: 10/30/13
Category
Synced: 8 Of 8
Last synced On: 10/30/13
Home
Products
Orders
Inventory
Sales


4:07 PM
Back
Sync Product
All
Synced
Unsynced
Conflicted
Baskin Robbins
SKU#: 001
UPP: $ 40.00
USP: $ 50.00
Modified On: 10/30/13
Is Modified: Yes
Download On: 11/10/13
Status Synced
Snickers
SKU#: 002
UPP: $ 15.00
USP: $ 17.00
Modified On: 10/30/13
Is Modified: Yes
Download On: 11/10/13
Status Synced
Cocacola
SKU#: 003
UPP: $ 10.00
USP: $ 12.00
Modified On: 10/30/13
Is Modified: Yes
Download On: 11/10/13
Status Synced
Tang
SKU#: 004
UPP: $ 35.00
USP: $ 40.00
Modified On: 10/30/13
Is Modified: Yes
Download On: 11/10/13
Status Synced
L'Oreal Conditionar
Home
Products
Orders
Inventory
Sales

Utility

Figure 97: Utility Page

GOIS-Pro Provides user the following utilities:

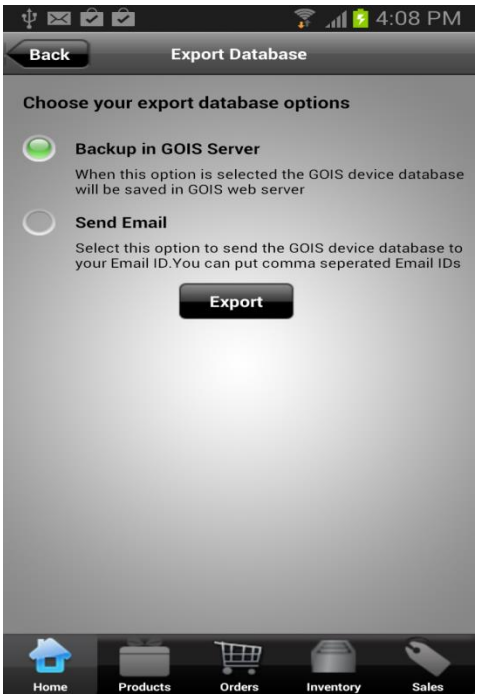
- Export Database
- Factory Reset

Export Database

1. Click on the '*Utility'* section mentioned on 'Home'screen.
2. Click on the tab 'Export Database'.
3. 'Export Database' window will pop up.
   - *Backup in GOIS Server*: Backup of GOIS device database will be created on web server.
   - *Send Email*: Backup and send GOIS device database to your email.
4. Click on 'Export' to export the database.

Figure 98: Export Database Page

Figure 99: Export Database Backup Page



Factory Reset

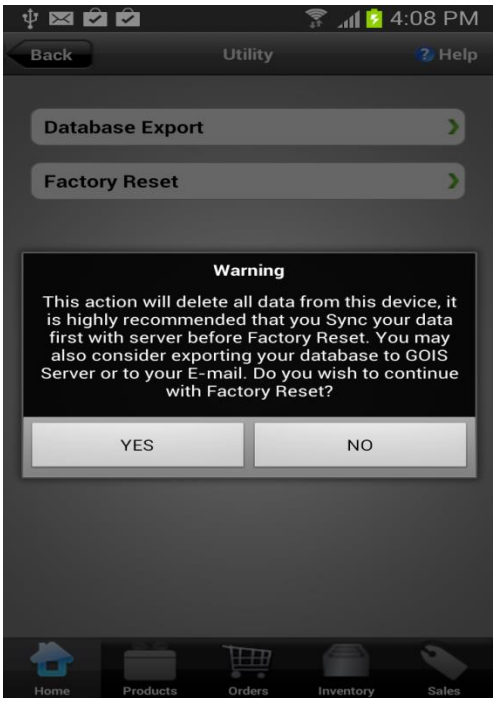
Reset the device data to its factory settings (default settings).

- All data gets erased from device as device will be flushed out and will be ready to download a new piece of information from web server.

  Note: Synchronize and export all the device data to web server before performing factory reset.

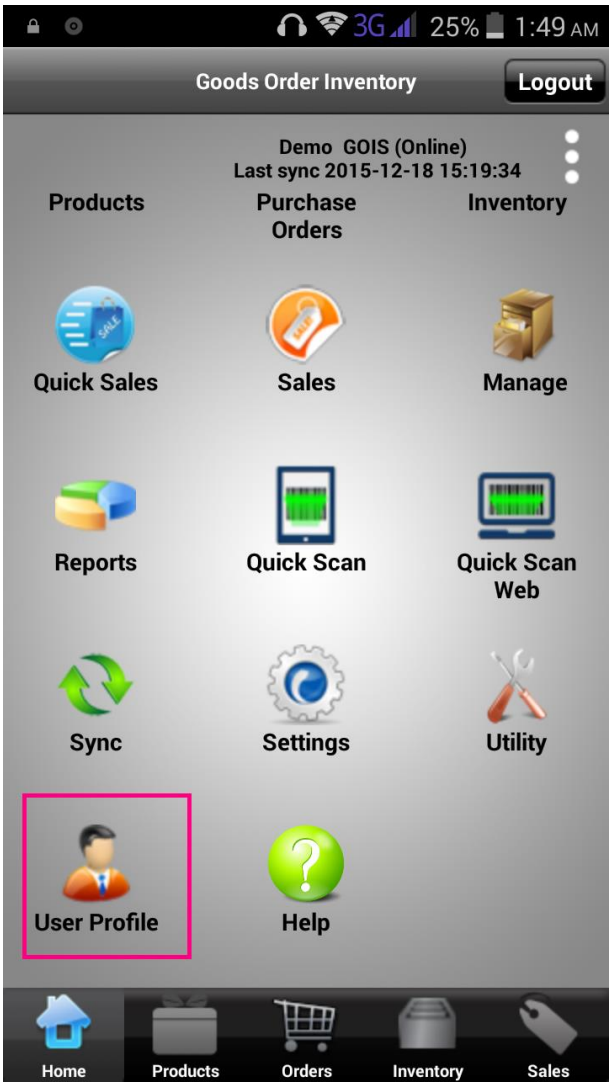
Figure 101: Factory Reset Page

Figure 102: Utility-factory reset Warning Page



User Profile

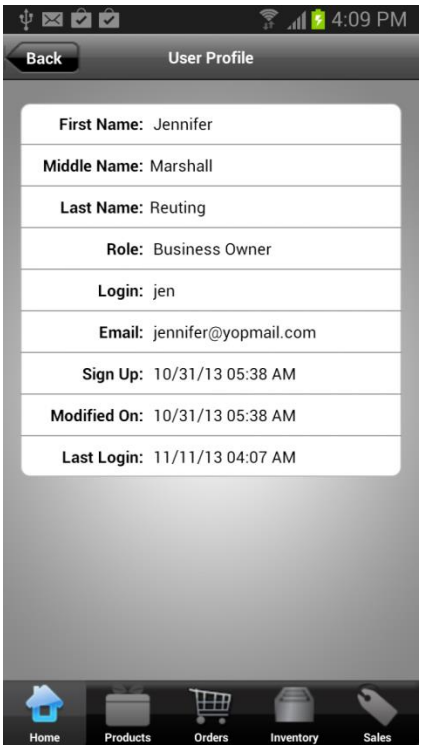
Figure 103: Goods Order Inventory User Profile Page



This section shows information related to user profile.

1. Click on the '*User Profile'* section mentioned on 'Home' screen.
2. User will be directed to 'User Profile' screen.

Figure 104: User Profile Page



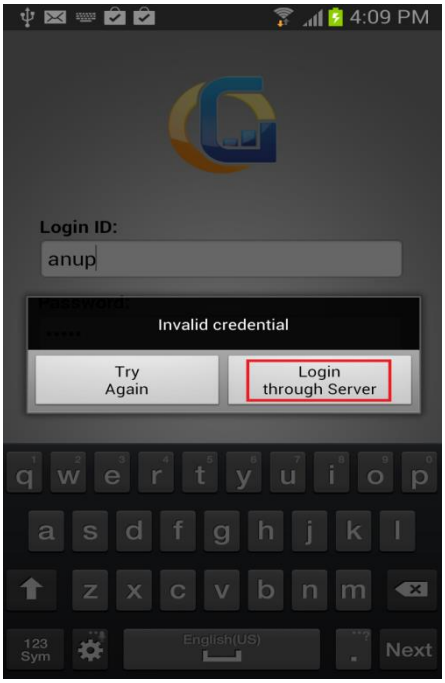
Single Platform for Multiple Users

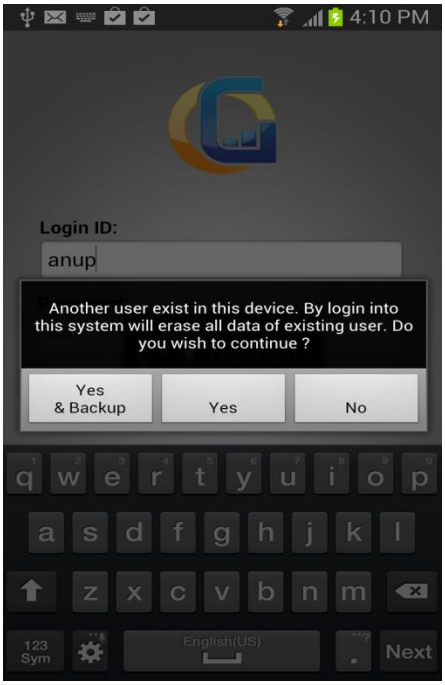
Multiple users can login to GOIS-Pro app on same device. Create a backup of your data before switching it to other user.

1. Open GOIS-Pro app.
2. Enter any new registered login credentials to sign in the GOIS-Pro app.
3. An 'Error' stating invalid credential wills pop-up.
4. Click on 'Server Login', to login with different/new user account on same device.
5. User will be asked to create a backup storage of previous used account.
    - *Yes*: Allows user to login with different account without creating any backup for previous account.
    - *Yes and Backup*: Allows user to create backup on server for previous account before signing in with different/new account.
    - *No*: This option will terminate the whole process.

Figure 104: Server Login Page

Figure 105: Warning-Yes & Back up page


4:09 PM
Login ID:
anup
Invalid credential
Try Again
Login through Server
Next


4:10 PM
Login ID:
anup
Another user exist in this device. By login into this system will erase all data of existing user. Do you wish to continue ?
Yes & Backup
Yes
No
Next

Support

Feel free to contact our customer care representatives for any queries related to setup, management and maintenance of your inventory system.

Contact us on +1-888-745-3321 (Support Ext. 2, Sales Ext. 1) or reach us at support@goodsinventory.com

Our technical experts will revert back to you within 24 hours after receiving the e-mail.

You can also get connected with us over live chat from GOIS web application during business hours (Monday through Friday, between 9:00 AM to 5:30 PM EST)

Contact US

MetaOption LLC
574 Newark Avenue, Suite 210
Jersey City, NJ 07306
Phone: +1 (201) 377-3150

MetaOption LLC
97 South Second St.
San Jose, CA 95113
Phone: +1 (408) 643-0021