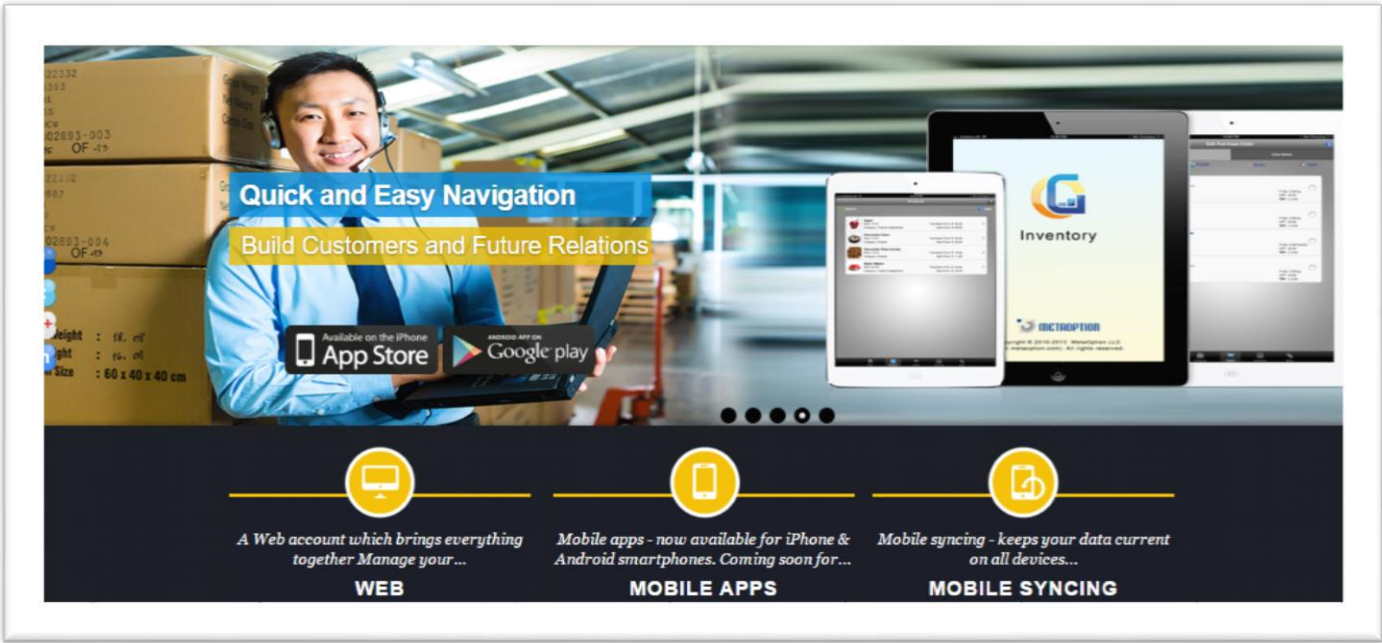
Goods Order Inventory-Pro

User Manual- Web

Updated on: 12th Jan 2016



Contents

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 GOIS-PRO web system functions, account settings, account management, payment & subscription details and technical support 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

www.goodsorderinventory.com

About GOIS

GOIS is an inventory management system where small and medium scale industry user can manage their products, purchase order, inventory, sales order etc… This application is available in the market by covering following devices.

1. iPhone, iPad
2. Android, Android Tab
3. BlackBerry

GOIS-PRO system is specially developed for managing business inventories and to help business owners in automating the daily inventory management activities.

GOIS-Pro is a SAAS based system and maintains all the data over central cloud which is accessible globally from anywhere and at any time with web application and mobile applications to work from.

With GOIS-PRO you can have multiple organizations, multiple business units, multiple locations as warehouse, multiple web and mobile users with real time data syncing from central cloud server, multiple products, categories, currencies, themes, time zones, customers, vendors, purchase orders, sales orders, inventory, stock transfer, stock import, stock adjustments, advanced business reports, filters, online/offline working modes and many more to make your work easier and can be managed effectively from anywhere and at any-time.

GOIS-PRO system supports below platforms to work with:

1. **Web Application**
   GOIS-PRO web application is very handy unlike installable applications. Using a simple web browser, a user can access the system from any location globally i.e. setting up GOIS-PRO system is not a complicated and cumbersome task and it does not require any prior setup, installation and configuration.
   Web user interface where business owner can manage their data.

2. **Device Application**
   GOIS-PRO device application allows you to work in online as well as offline mode from global locations. So even if you are in a remote location or don't have the internet connectivity, a user can continue their activities with offline mode and may sync their data once get connected with the network. GOIS-PRO device app is available on respective app store of Android and iOS devices.
   a. Android Phone, Android Tablet
   b. iPhone, iPad

What's in this manual

This manual will provide you information about the functionalities that GOIS Pro provides to its user.

To make a best use of GOIS Pro, user must be familiar with the features; it will cover all the details about GOIS Pro that are important from the user's aspect for a better understanding.

Help Section of the website

To have a better understanding about GOIS-PRO system functionality or to get answers on your query, a user can navigate to the Help menu of the website; it gives you the flexibility to get connected with GOIS support or to check the useful documentation to be helpful in exploring the system.

Part 1: Dashboard

When a Business owner successfully logged in, you will be redirected to a home page. This page is called as the dashboard in GOIS.

The GOIS-PRO dashboard is divided into different sections to allow a business owner to have a quick eye on all the activities performed by different users under an organization.

FIGURE 1.1

Portion 1 (Filters)

A portion of the screen has been shown in **(Figure 1.1).** In the above snapshot, fields that can be used to filter data is shown description of the fields are given in the below mentioned table.

Dashboard Part-1	
Field	Description
Date	This dropdown contains predefined time frames for filtering the results and the statistic.
From	Specific starting date to filter the result and statistics.
To	Specific ending date to filter the result and statistics.
Filter	Click on this button to filter the result, according to the timeframe provided.
Reset	Click on this button to reset the date fields.
Subscription Info	Click on this link to see the subscription details.
Create a Case	A link allows you to raise a case to GOIS support against your queries.
Import a Product	Click on this link to view imported product using CSV file and add some more product using CSV files.

Portion 2 (Summary)

On the basis of user’s activities in a given duration, a business owner can look on the summary/counts of categories, products, sales and purchase orders that have been created into the system as shown in **(Figure 1.2)**

Summary			
Categories	Products	Sales Orders	Purchase Orders
1	28	39	17

FIGURE 1.2

Portion 3 (Top Product)

This portion of the dashboard shows the list of Top Products with highest Profit,Sale and Purchase. Snapshot of the section is shown in **(Figure 1.3)**.

Top Products | with highest profit ▼

	Products	Profit(%)	Net Profit
○	P2	9.09%	$ 268,824,850.00
○	p4	8.33%	$ 25,527,250.00
○	p3	11.11%	$ 2,560,580.00
○	iphone	16.67%	$ 2,000,000.00
○	p1	9.98%	$ 143,910.00

FIGURE 1.3

By default the product with highest profit will be shown, user can populate different set of data by using the dropdown of the Top Product. Snapshot of the dropdown is shown in **(Figure 1.4)**.

with highest profit ▼
with highest profit
with highest sale
with highest purchase

FIGURE 1.4

Portion 3 (Inventory for Top Products)

This portion shows the inventory of the top products. User needs to click on the radio button adjacent to the name of the top product to populate their details about their inventory in this section. Snapshot of the portion is shown in **(Figure 1.5)**.

Inventory for Top Products

Product	Stock on Hand	Stock Avail.	Qty booked	Cost by SP
p4	0.00kg	0.00kg	0.00kg	$ 0.00

FIGURE 1.5

Inventory for Top Products	
Field	Description
Product	Name of the Product
Sock on Hand	Total available qty. available for sale.
Stock Avail.	Total available qty. including booked qty.
Qty booked	Total quantity booked
Cost by SP	Cost by selling Price

Portion 4 (Low Stock)

This section shows low stock inventory items with respect to the Business Unit and location. User can select the Location BU from the list Locations in the drop down list. Snapshot of the portion is shown below in **(Figure 1.6)**, and Snapshot of the dropdown list is shown in **(Figure 1.7).**

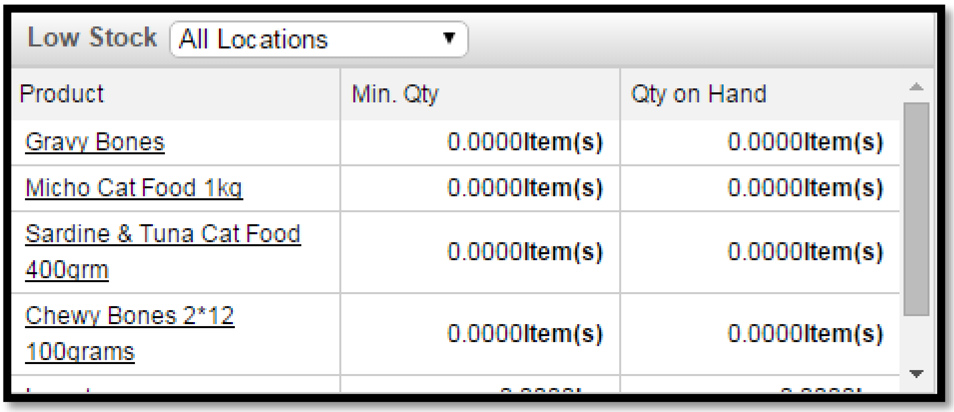


FIGURE 1.6

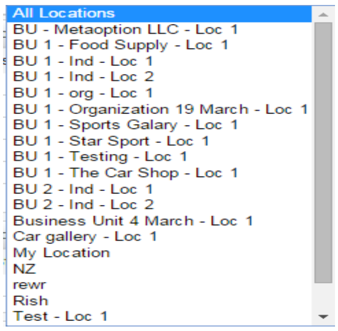


FIGURE 1.7

Portion 5 (Account Summary)

An Account summary portion of the dashboard section shows the GOIS-PRO account balance (wallet) details and summary of payment transactions against debit of your GOIS-PRO account balance/registered credit card or credits in the account balance against coupons/refunds. It shows the last 5 transaction details with their InvoiceID and Ref.No.

Portion 6 (Payment History)

Account Summary
Account Balance: $3.67
Last 5 Transactions
1. Debited $ 60.00 Ref. No. On 12/01/2014 01:31 AM
2. Debited $ 34.00 Ref. No. InvoiceID - 9500 On 11/14/2014 01:00 AM
3. Credited $ 18.67 Ref. No. InvoiceID - 9500 On 11/14/2014 01:00 AM
4. Debited $ 21.00 Ref. No. InvoiceID - 9476 On 11/13/2014 01:52 AM
5. Credited $ 100.00 Ref. No. NWQ21L On 11/13/2014 01:49 AM

FIGURE 1.8

This Portion shows the details about the payment that has been made against the GOIS-Pro subscription. Snapshot of the window is shown in **(Figure 1.9)**.

Payment History
1. Paid $ 60.00 on 12/01/2014 01:31 AM
2. Paid $ 34.00 on 11/14/2014 01:00 AM
3. Paid $ 21.00 on 11/13/2014 01:52 AM
4. Paid $ 0.00 on 11/29/2013 05:26 AM

FIGURE 1.9

Portion 7 (Notification)

This portion shows the notification related to the system. All the notifications would be visible to business owners against different activities that has been made into the system by different users. Snapshot of the portion is shown in **(Figure 1.10)**.

Notifications	View All
8/10/2015 6:44:34 AM	Report
8/1/2015 1:51:58 AM	Invoice Validation Failed
7/28/2015 1:48:58 AM	GOIS Invoice (Invoice No:21759)
7/27/2015 7:26:52 AM	GOIS Report
7/1/2015 3:49:32 AM	Invoice Validation Failed

FIGURE 1.10

Portion 8 (Top Sellers)

To analyze the performance of a given business unit or organization or recurring customer, a business owner can check the total profit or sale or total number of transactions that has been made in a given time period. This portion of the dashboard shows the top seller and their details in the form of graph. The color notation is described on the right side in the given snapshot **(Figure 1.11)**.

- Red- Number of Transaction
- Green- Total Profit
- Blue- Total Sales

User can change the details by using the clicking on the radio buttons adjacent to "Business

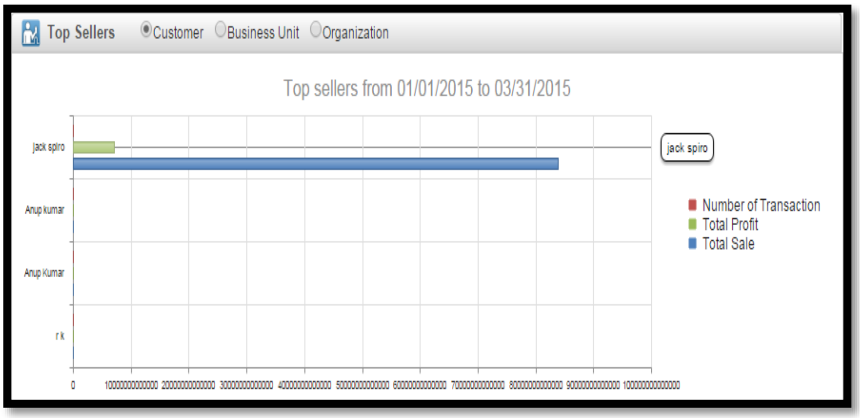


FIGURE 1.11

Unit" or "Organization" to see the details about these. By default Customer is selected.

Portion 9 (Sales)

This portion shows the sales report in the form of graph for the specific time frame. GOIS Pro provides different graphs to depict the data. There are three different graphs that a user can switch to see the details (Bar Chart, Area Chart and Line Chart. The description is shown in the below given snapshot. Moving the mouse pointer along the graph will show the relevant details at every point on the graph.

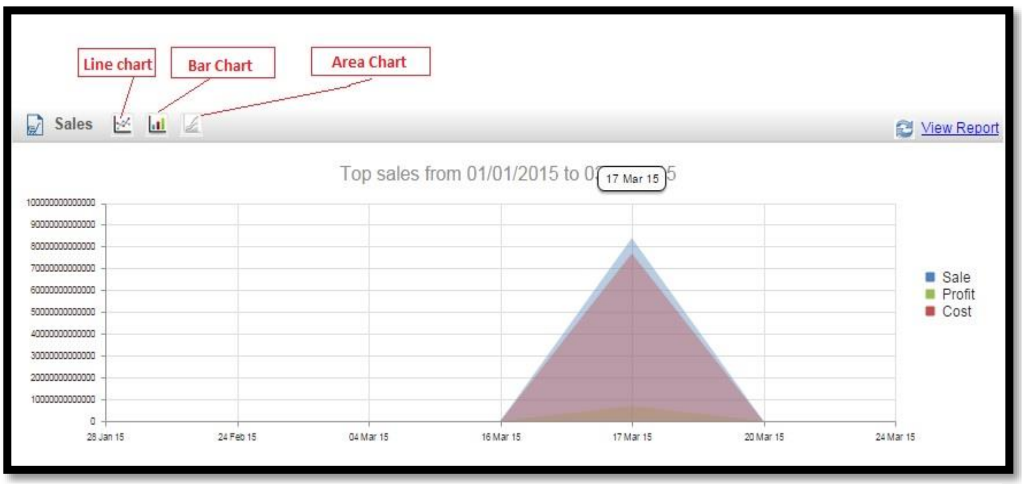


FIGURE 1.12

Portion 10 (Purchase)

This portion of Dashboard shows the Purchase details in different graphical forms. User can select the “Line Chart”, “Bar Chart”, “Area Chart” according to their convenience. The description is given in the snapshot below **(Figure 1.13)**.

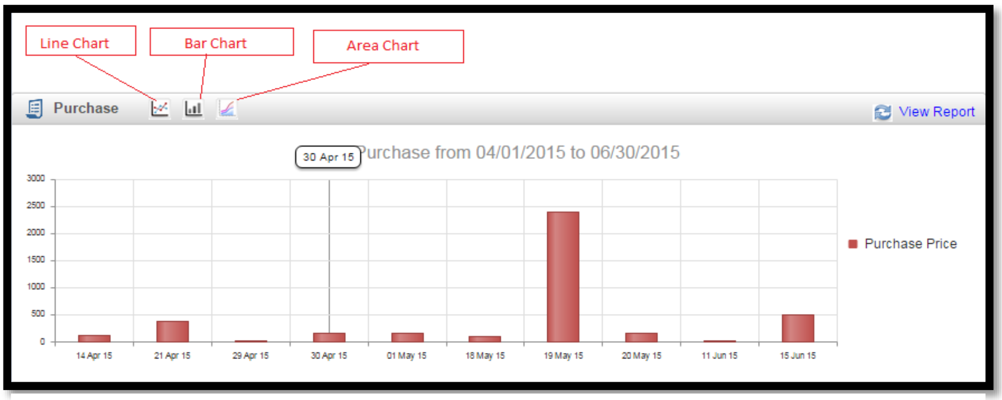
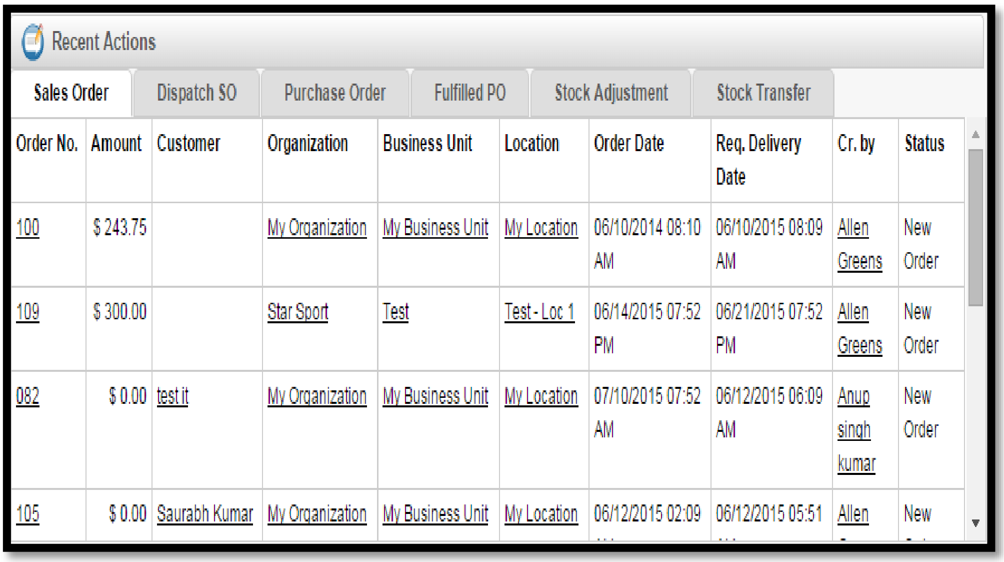


FIGURE 1.13

Portion 11 (Recent Actions)

This section of document provides details about the recent actions that has been performed. The snapshot of the section is given below in **(Figure 1.14)**.



Order No.	Amount	Customer	Organization	Business Unit	Location	Order Date	Req. Delivery Date	Cr. by	Status
100	$ 243.75		My Organization	My Business Unit	My Location	06/10/2014 08:10 AM	06/10/2015 08:09 AM	Allen Greens	New Order
109	$ 300.00		Star Sport	Test	Test - Loc 1	06/14/2015 07:52 PM	06/21/2015 07:52 PM	Allen Greens	New Order
082	$ 0.00	test it	My Organization	My Business Unit	My Location	07/10/2015 07:52 AM	06/12/2015 06:09 AM	Anup singh kumar	New Order
105	$ 0.00	Saurabh Kumar	My Organization	My Business Unit	My Location	06/12/2015 02:09	06/12/2015 05:51	Allen	New

FIGURE 1.14

This section is used to provide details about the recent action related to

- Sales Order
- Dispatch Sales Order
- Purchase Order
- Fulfilled PO
- Stock Adjustment
- Stock Transfer

User needs to click on the tabs given at the top of the section to get details with respect to them. All related fields will get populated in the same window to provide the user full knowledge about the action.

Part 2: Functionality

This section of documentation includes the detail description about the functionalities that GOIS provides for inventory management. You can refer to this section for assistance on the actions to be performed on the below mentioned modules.

The functionalities that are discussed in this part are:

- **Chapter 1: "Product",** before you perform any activity related to inventory, purchase or sale, the basic unit to be used to perform the desired operation under an organization is a product. This chapter will give you detailed information about business, product list setup and the related actions to be useful in maintaining the product information across the system. This chapter will cover broad functionalities like
  - **Add New Product**
  - **Manage Products**
  - **Import Products**
  - **Manage Categories**

- **Chapter 2: "Purchase"**, Every Organization needs a track on the purchases that have been made in a given period, purchase is one of the important aspect of an inventory. This chapter will give you knowledge about
  - **Raise Purchase Order**
  - **Manage Purchase Order**
  - **Closed Purchase Order**
  - **Manage Vendor**

- **Chapter 3: "Inventory"**, this part of the document provides the knowledge about the functionalities that GOIS Pro provides in the Inventory Module. You will get to know about the stock related operations of the system after going through this section.
  This chapter will broadly cover functionalities like:
  - **View All Available Stock**
  - **Stock Listing**
  - **Stock Activity**
  - **Stock Summary**
  - **Manage Location**

- **Chapter 4: "Sales"**, this part of the document explains the functionalities related to Sales order and its management in the GOIS Pro. This Chapter will cover functionalities like:
  - **Punch Sales Order**
  - **Manage Sales Order**
  - **Closed Sales Order**
  - **Voided Sales Order**
  - **Manage Customer**

Chapter 1: Product

This part of the documentation describes the functionalities for product related management, such as add products, manage added products, importing products by using CSV file, and managing categories of the product. A product into the GOIS-PRO system can be considered as a master item. Once you define a product in your product list, you will then be able to use the same across different sections of the GOIS system like inventory, purchase, sale, etc. Each product must be having a unique product number/SKU#/Barcode associated with it to identify it uniquely across different sections. **Example:** A product can be a **Toy Car** having some features and specifications with a unique product number. Each product can have 0 - N number of quantities into the inventory/warehouse.

The following sections are described below:

- Add new Product
- Manage Product
- Import Product
- Manage Categories

Add new Product

To add a new product, you have to navigate to the “Add new product” section, this option can be found under the Products drop down menu. The navigation of the menu is shown below.

To Add New Product: (Home>>Products>>Add New Product**)**

1. Move the mouse pointer to the “Products” section on the menu bar, a drop down menu will be displayed, click on the ‘Add New Product’.

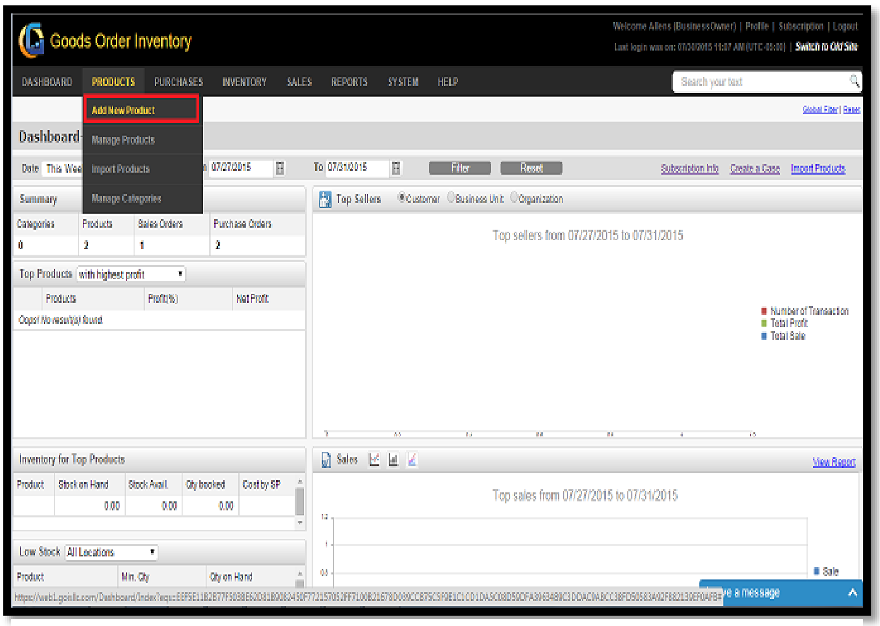


FIGURE 2.1.1

2. After clicking on the ‘Add New Products’ a popup window will be displayed. Select the organization in which you want to add the product. All the business products will be under organization level in the hierarchy of GOIS system.

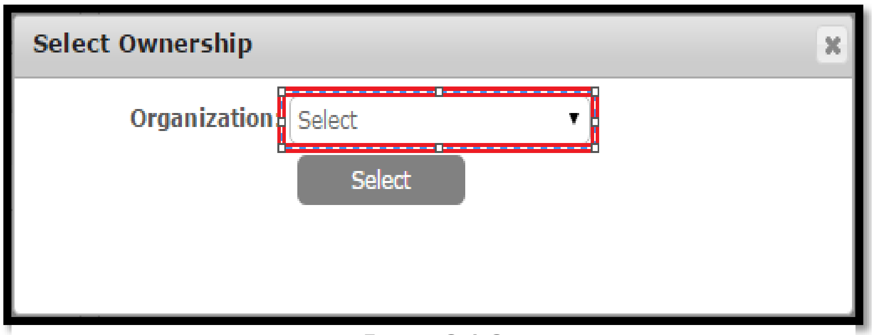


FIGURE 2.1.2

3. Click on the Select button; after selecting the organization, you will be redirected to the Product Info page as shown in **(Figure 2.1.3)**.
4. Under **Product Info** page, you have to provide all the necessary information of a product that needs to be added. Snapshot of the page and the description of the fields are given below.

Product Info Tab:

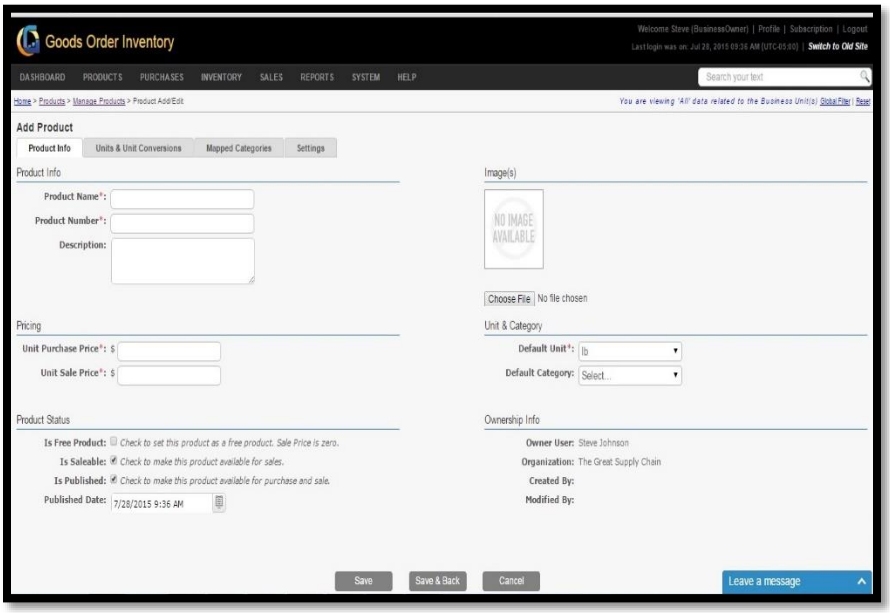


FIGURE 2.1.3

Field Name	Description
Product Name	This field specifies the name of the Product to be defined by user (Mandatory).
Product Number	Product unique number/Barcode/SKU# throughout an organization. By clicking on *Check Availability* link user can check the availability of the product number.

Description	A description or additional product related information can be kept in this field.
Unit Purchase Price	This field needs to be defined to set the default purchase price for a product. It is a mandatory field and must be entered by the user.
Unit Sales Price	This field needs to be defined to set the default sales price for a product. It is a mandatory field and must be entered by the user.
Is free Product	This field is used to make the product free. The sales price for a free product is zero. By checking this field, a user agrees to make the sales price of this product as **'zero'**.
Is Saleable	Once you check this field, the product becomes available for sale.
Is Published Date	Check this field to publish a product and to make it available for purchase and sale. **Products publish date:** A product can't publish at a past date.
Choose File	Upload an image of the product.

Unit & Unit Conversions Tab:

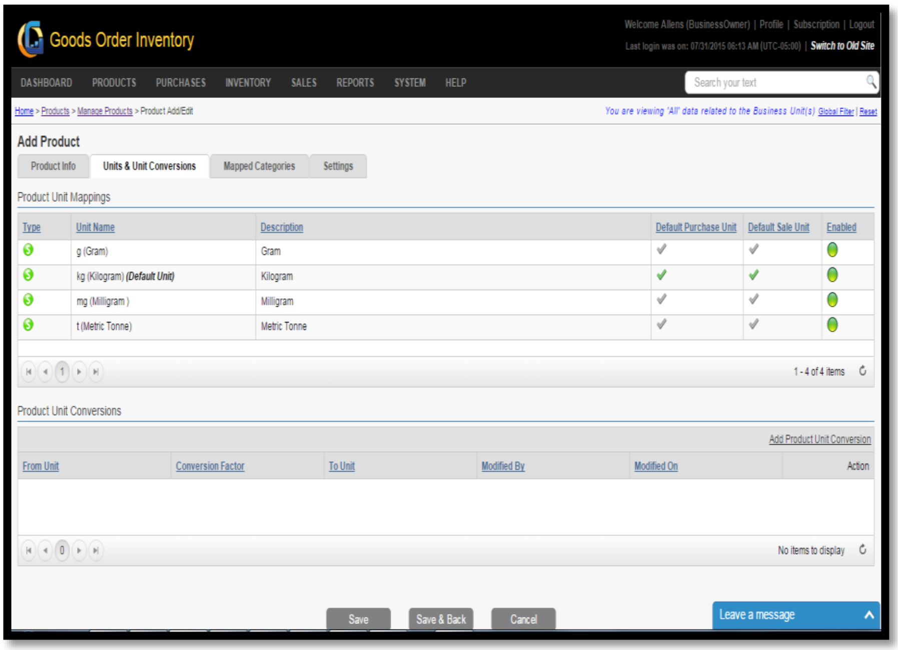


FIGURE 2.1.4

Overview

In GOIS, we have provided the facility through which you can add your own units and define their unit conversions. Any units added by the user are referred as User-Defined units. These units can be used later while making Purchase Orders and Sales Orders.

Field	Description
Type	Unit type may be of two types User Defined or System Defined.
Unit Name	Name of the Unit
Description	Description about the Unit
Default Purchase Unit	This field specifies the default measurement unit to be used while making any purchase.
Default Sales Unit	This field specifies the default measurement unit to be used while making any sales.
Enabled	This field specifies whether the given measurement unit is in use or not across different sections of the system.
Add Product Unit Conversion	This link is used to define the conversion factor for the user defined measurement unit.

Mapped Categories tab:

Mapped Categories section provides the information about the category to which the current product is mapped.

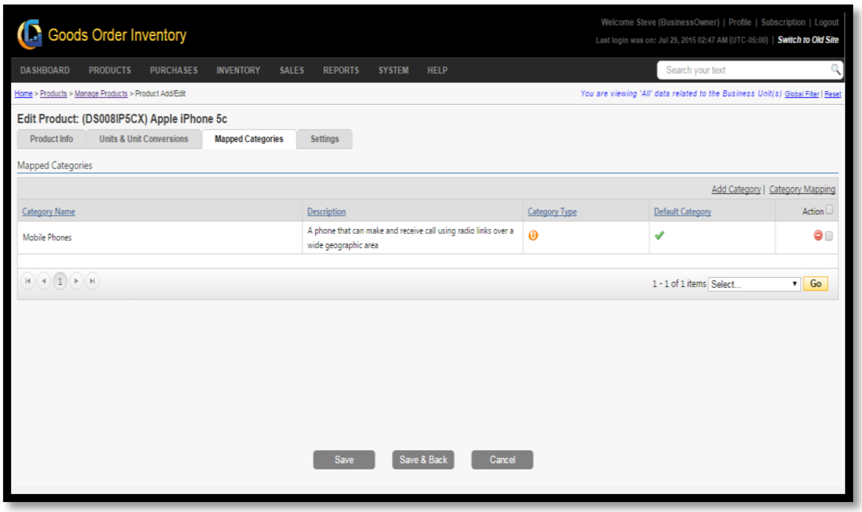


FIGURE 2.1.5

Field Name	Description
Category Name	Name of the Category
Description	Detailed description about the category
Category Type	It can be of two types User Defined or system defined.
Default Category	This field describes whether the Current category is default or not.
Action	User can remove the mapping of the product with a particular category, using given Action icons.
Add Category	User can add new category by using this link.
Category Mapping	Using this link, user can map a product with different categories defined into the system.

Settings Tab:

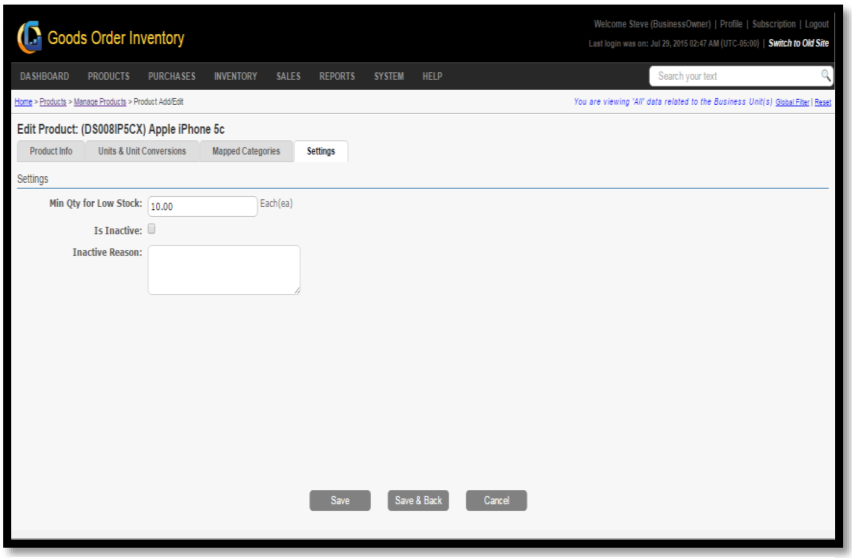


FIGURE 2.1.6

Fields Name	Description
Min Qty for Low Stock	This field is used to set the lowest limit of quantity below which a product will be under low stock band and needs to be reordered.
Is Inactive	User can tick the checkbox to make the product inactive. Inactive products are not available for purchase and sale.
Inactive Reason	User needs to provide a reason why a particular product is inactive and is not in use for purchase and sale.

Settings section can be used to set Min quantity for low stock limit of a current Product to be used as a threshold into the inventory for alert. Making the Product Active or Inactive and provide the reason for the product to be inactive.

Fields Icon	Description
	By clicking on the icon user is provided with a pop-up window describing the details of a product.
	By clicking on this icon, user will be redirected to the edit product page for the current product; user can edit the information and then save it.
	By clicking on this icon, user can create a similar copy or clone of a product with a unique product number.
	By clicking on this icon user can see the category to which the current product is mapped.
	By clicking on this icon user can delete the product. A product can be deleted only if it is not in use across different sections like purchase, inventory, sale, etc. to maintain the data consistency.
	Click on this icon to add the stock for a product.
	Click on this icon to make the stock adjustments for a product.
	Click on this icon to make the stock transfer across multiple locations and BU for a product.

Manage Products

A business owner can manage their product catalogue and corresponding product information like purchase price, sale price, etc. To manage products, user has to navigate to the "Manage products" section; this option can be found under the Products drop down menu. Navigation of the menu is shown below.

To Manage Products: (Home>>Products>>Manage Products**)**

1. Move the mouse pointer to the “Products” section on the menu bar, a drop

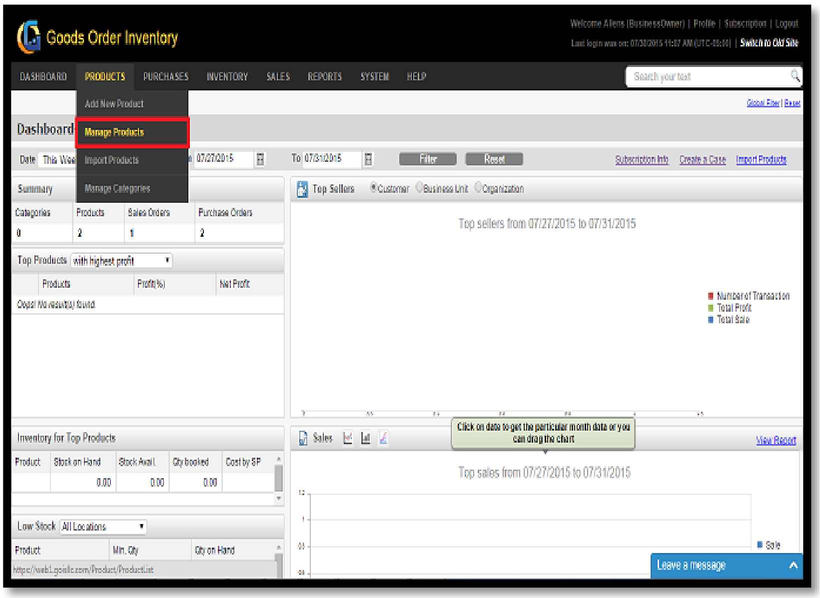


FIGURE 2.1.7

down menu will be displayed, click on ‘Manage Products’.

2. Clicking on the ‘Manage Products’ will redirect the user to a page; Snapshot of the window is shown below in **(Figure 2.1.8)**.

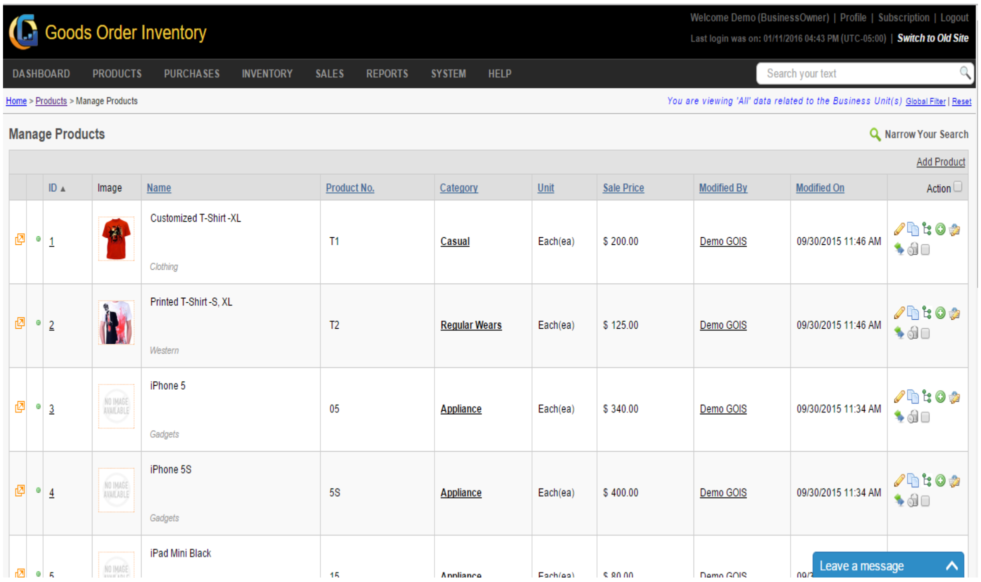


FIGURE 2.1.8

Product Preview

Product preview functionality gives a user an option to quickly view all the details about a specific product in a popup. User can perform this action by clicking on the icon highlighted in the snapshot given below in **(Figure 2.1.9)**.

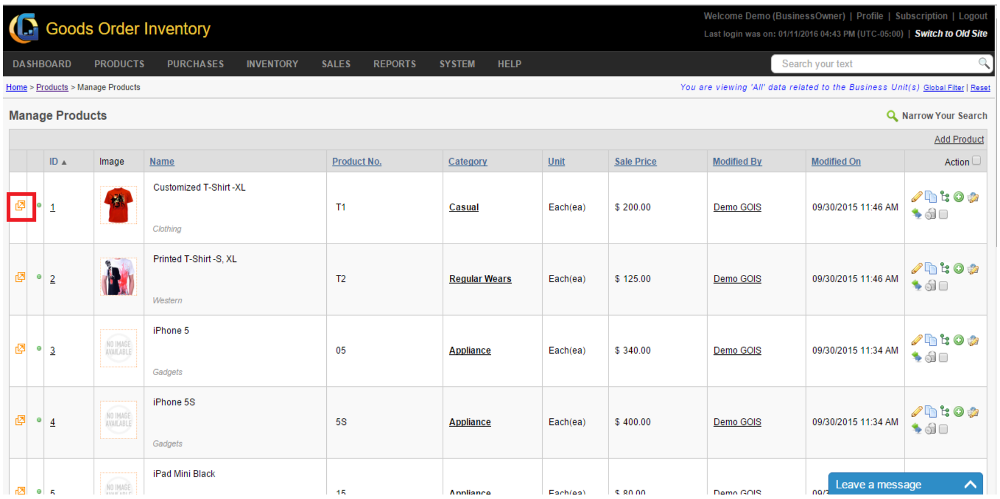


FIGURE 2.1.9

After clicking on the highlighted icon a popup window is displayed, containing all the relevant information about the product. The Popup window contains fields like: Description, Unit Purchase Price, Unit Sales Price, Default Unit, Default Category, Owner User, Organization, Is Published, Published Date, Is Saleable, Is Disabled, Disabled Reason.

Edit Product

User can edit a product's detail after clicking on the pencil icon highlighted in the snapshot given below in **(Figure 2.1.10)**.

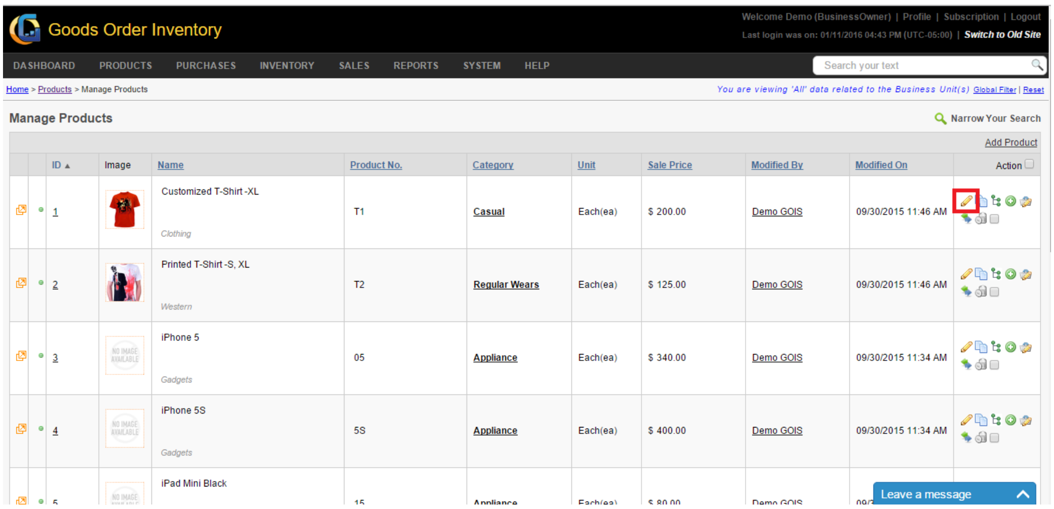


FIGURE 2.1.10

After clicking on the icon user will be redirected to an Edit product window, **(Figure 2.1.11)** where current data are shown in an editable textbox. User can edit the field and click on save to update the changes made by him.

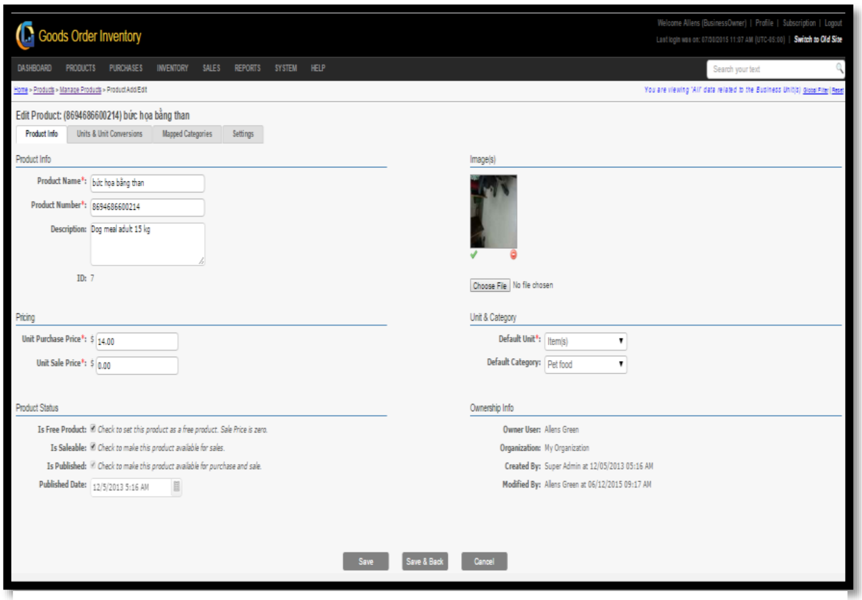


FIGURE 2.1.11

Clone of Product:

GOIS Pro Provides a mechanism to create copies of the product, at the same time user has to keep in mind that the new copy of the product must have a different and unique product number as well as a Product name.

1. To make clone of a product user needs to click on the icon, highlighted in the snapshot given below in **(Figure 2.1.12)**.

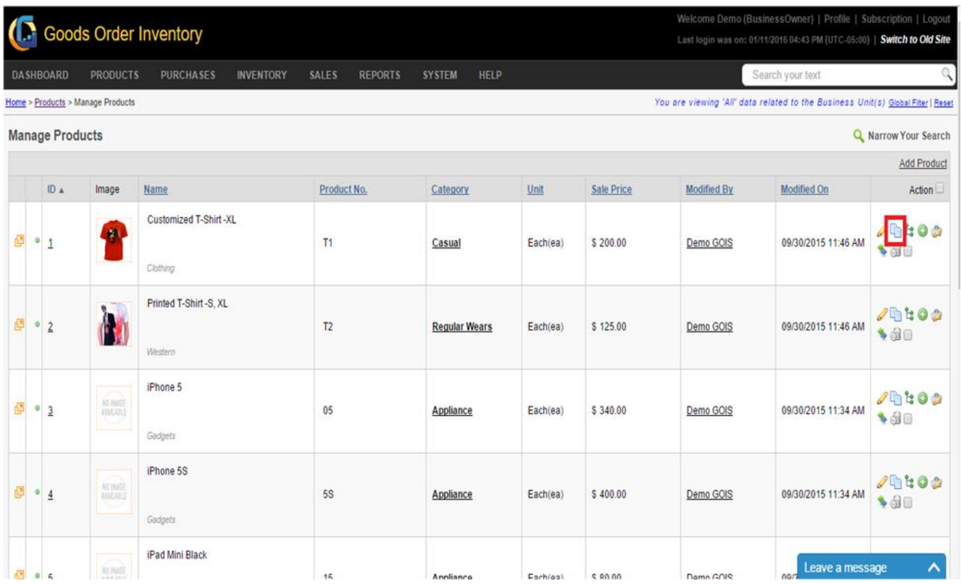


FIGURE 2.1.12

2. After clicking on the icon a popup window will be displayed. Provide the unique product number and Product name through this window. Snapshot of the window is given below in **(Figure 2.1.13)**.

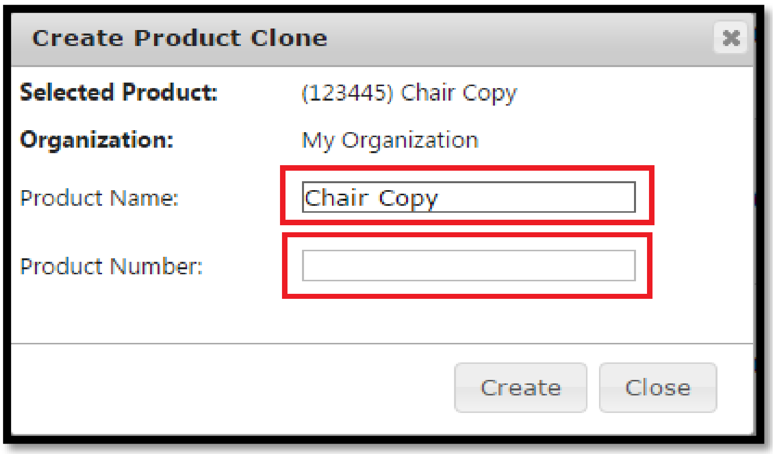


FIGURE 2.1.13

Note: To create a clone user has to provide a unique Product name and Product Number.

Delete Product

To delete a product user needs to click on the icon, highlighted in the snapshot given below in **(Figure 2.1.14)**.

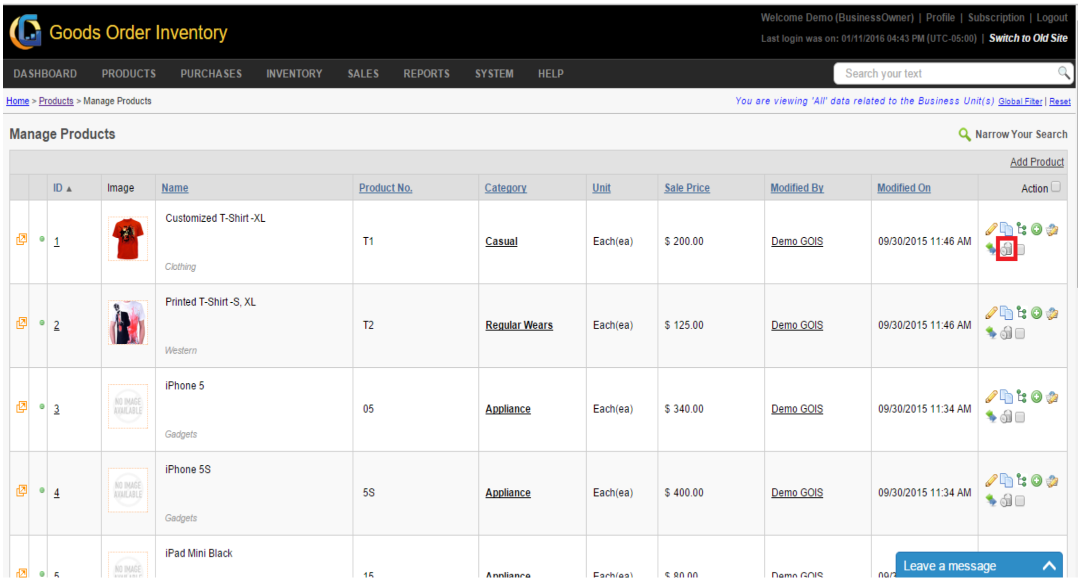


FIGURE 2.1.14

After clicking on the icon a popup window will be shown asking for the surety of the user, Click on 'Ok' to delete the product and 'cancel' for cancellation of the deletion. After deletion of the product a successful message will be displayed.

Note: A product can be deleted only if it is not in use across different sections of the system like purchase, inventory, sale, etc. to maintain the data consistency.

Mapped Category View

User can see the category to which the current product is mapped. For this user has to click on the icon highlighted in the snapshot given below.

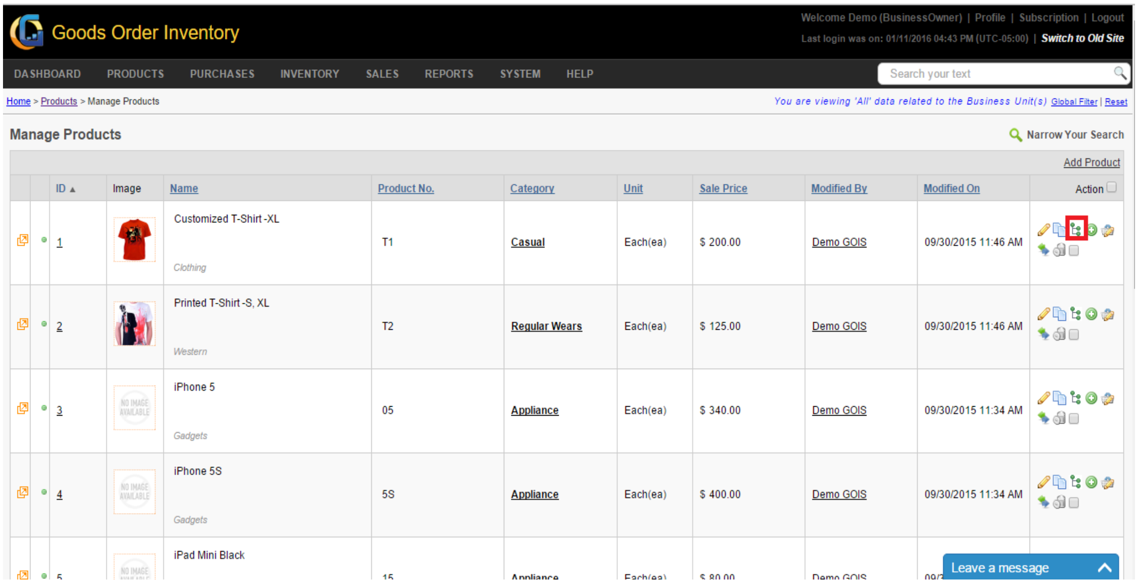


FIGURE 2.1.15

Import Products

GOIS Pro provides an efficient way to import the list of products from your PC. It allows business owners to bulk upload multiple products via a very friendly Import Manager. Import manager supports .CSV file format, files in any other format is not acceptable and will cause error in upload. The format of the data file being uploaded should be provided as per the sample that can be found on the website.

To Import Products: (Home>>Products>>Import Products**)**

1. Move the mouse pointer to the “Products” section on the menu bar, a drop down menu will be displayed, click on ‘Import Products’.

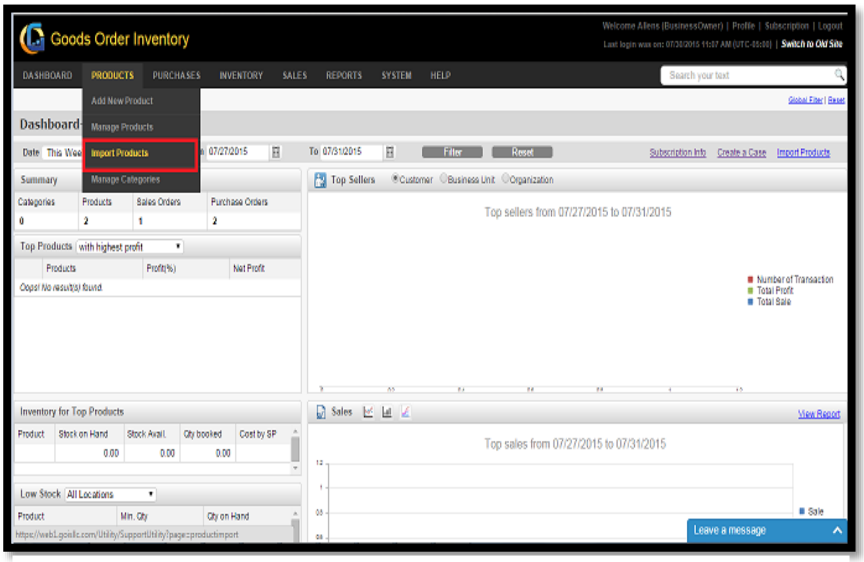


FIGURE 2.1.16

2. After clicking on the ‘Import Products’, user will be redirected to the instruction section of product import. Snapshot of the window is shown below.

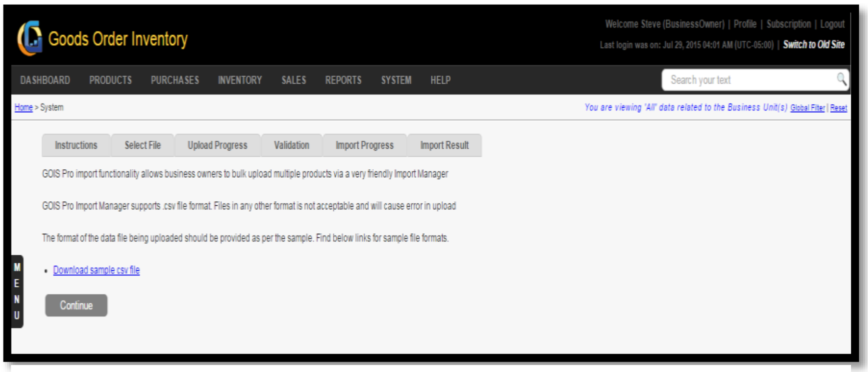


FIGURE 2.1.17

The user must follow the step by step procedure of uploading the file.

Step 1: Download the sample CSV file provided under the instruction sections of import manager.

Step 2: Fill all your business product information in the standard CSV file provided like product name, product number, purchase/sale price, measurement unit, etc.

Note:
1. Please make sure you haven't changed or modified the header of provided CSV file.
2. All the fields must have the data in each cell for successful import. Do not leave any cell unfilled against any product number.
3. All the fields are mandatory.

Step 3: Hit continue and browse the filled CSV file to upload the same under your account for import.

Step 4: System will validate the data as per the compatibility of GOIS-PRO system and will show you the result of validation. User can edit the necessary information against the invalid records under validation phase to move forward with the import process.

Step 5: Once all the necessary corrections has been made by the user against the invalid records, user may hit Continue button to import all the products under their account.

Step 6: After import process has been completed, user will get a successful message as a confirmation of process completion.

Manage Categories

User can categorize the products to make the business product list management more efficient. To Manage Categories, user has to navigate to the "Manage categories" section, this option can be found under the Products drop down menu. Navigation of the menu is shown below.

To Manage Categories: (Home>>Products>>Manage Categories**)**

1. Move the mouse pointer to the "Products" section on the menu bar, a drop down menu will be displayed, click on 'Manage Categories'.

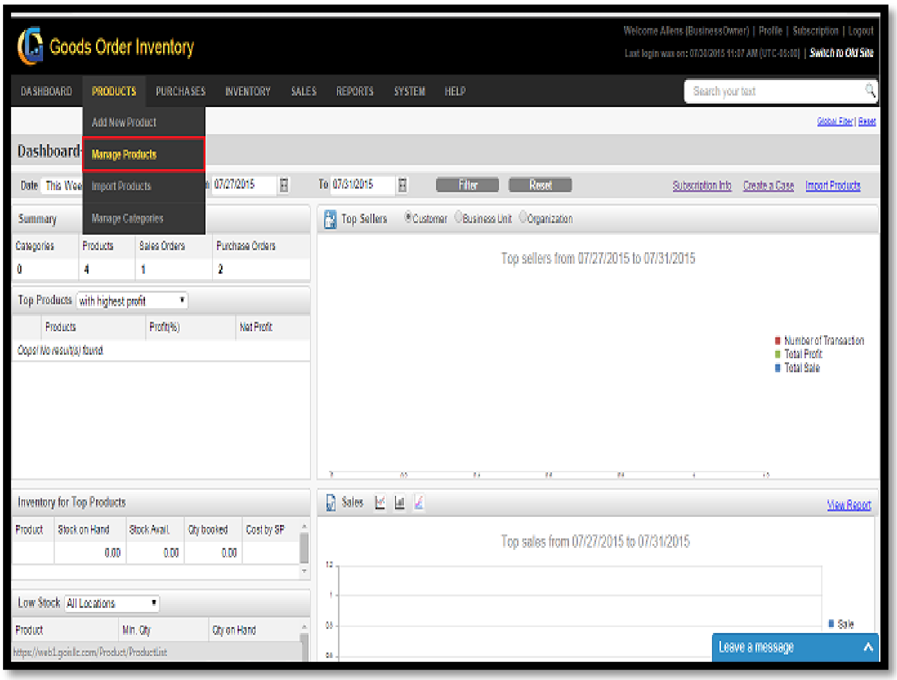


FIGURE 2.1.18

2. After clicking on the 'Manage Categories' a new window will be displayed. Snapshot of the window is shown below.

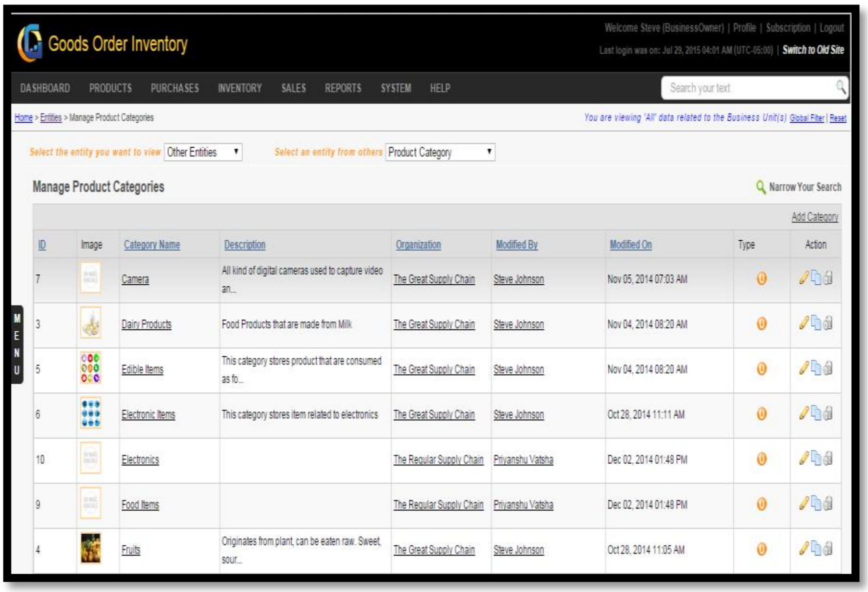


FIGURE 2.1.19

Fields	Description
Category Name	This field specifies the name of a category. By clicking on a particular category name, user gets redirected to the description page of the specific category being clicked.
Organization	This field specifies the associated organization with a particular category.
Modified By	This field specifies the name of a person who modified the category information.
	By clicking on this icon user can edit the category details.
	By clicking on this icon user can create a clone of the category at organization level.
	By clicking on this icon user can delete the category.
Add Category	By clicking on this link user can add new category.

Product Detail

Using this section, all the products related transactional information can be seen in one shot. To get the details about a specific product, user needs to navigate to the Product Details page. Navigation of the page is given below.

To view Product Detail: (Home>>Products>>Manage Products>> Product Details**)**

1. Move the mouse pointer to the "Products" section on the menu bar, a drop down menu will be displayed, click on 'Manage Products'.

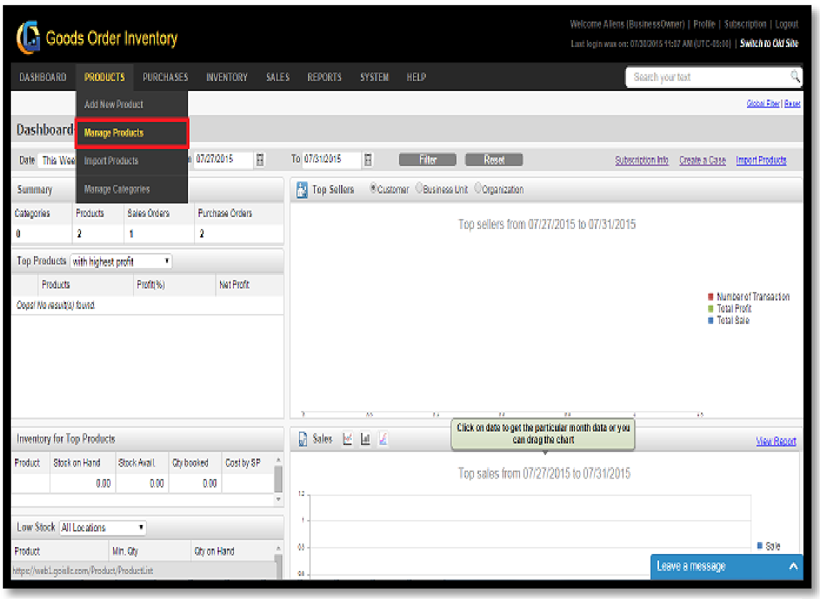


FIGURE 2.1.20

2. Clicking on the 'Manage Products' will redirect the user to a product listing page; Snapshot of the window is shown below in **(Figure 2.1.21)**.

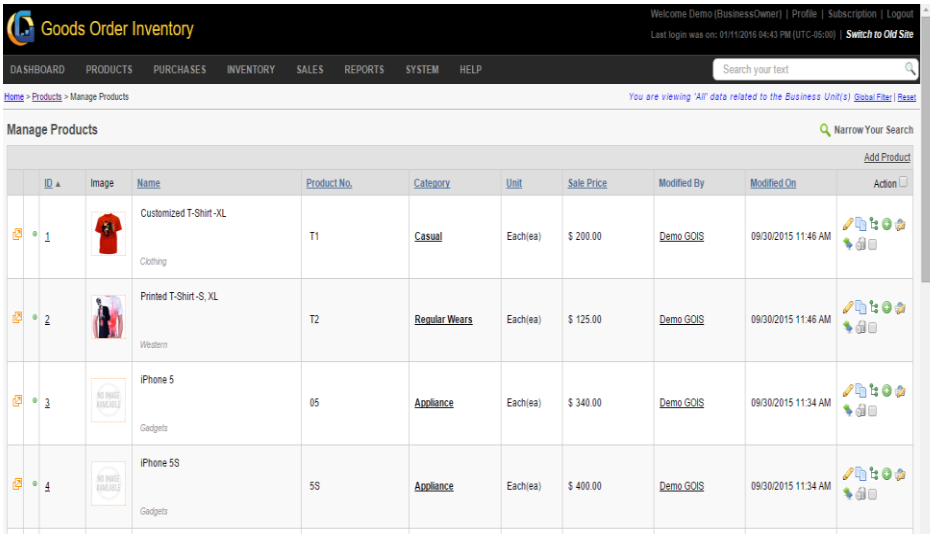


FIGURE 2.1.21

3. Click on the “ID” field or on the Specific image of the product and you will be redirected to the “Product Details page” a section of the page is shown in **(Figure 2.1.22)**

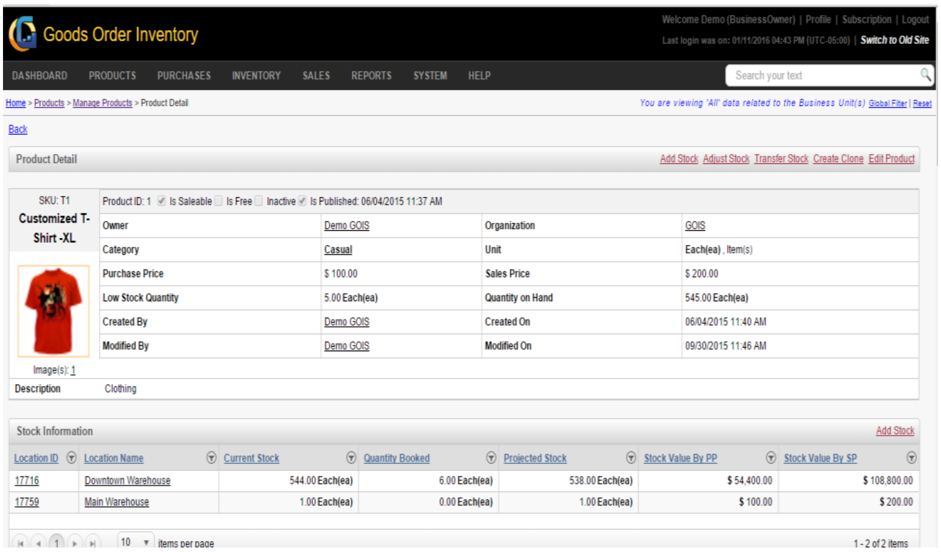


FIGURE 2.1.22

4. The details provided about the product are divided into different sections.
   - **Product Details**
   - **Inventory /Stock Information**
   - **Purchase Order-Line Item Information**
   - **Sales Order - Line Item Information**
   - **Transaction Information**
   - **Profit/Loss Information**

Product Detail

This section of the product detail window provides all the basic information about the product like product number, product name, category, ownership, price, unit, total qty. on hand under an organization, etc. Snapshot of the section is provided in (Figure 2.1.24).

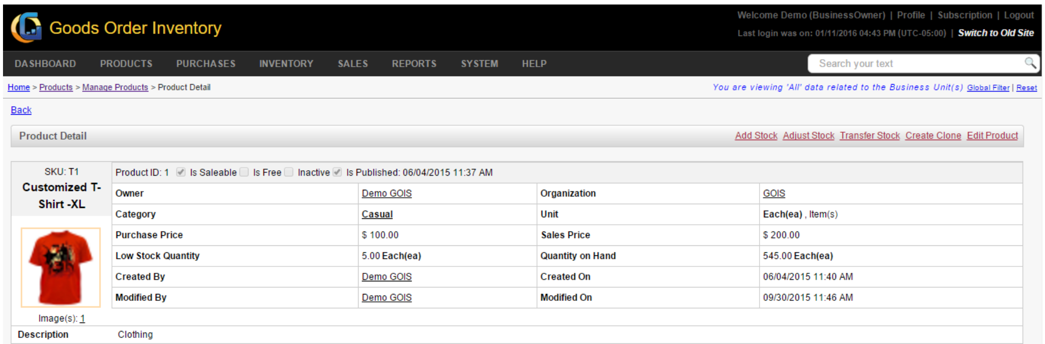


Figure 2.1.24

Inventory/Stock Information

To know about Inventory and stock details of a product, user needs to navigate to this portion of the Product Detail page. It will provide you knowledge about fields mentioned in the below given table; snapshot of the page is shown in (Figure 2.1.25).

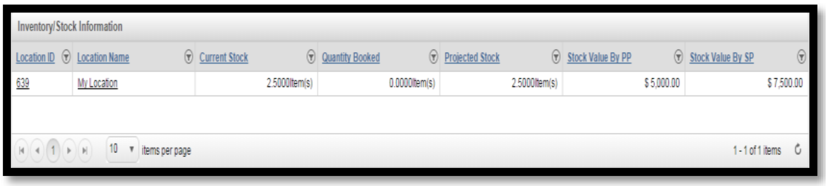


FIGURE 2.1.25

Inventory/Stock Information	
Field	Description
Location ID	ID of the location where the product stock resides.
Location Name	Name of the location
Current Stock	Current available stock of a product (including booked qty.).
Quantity Booked	Total quantity booked
Projected Stock	Total qty. available for sale
Stock Value By PP	Total stock value by purchase price for a location.
Stock Value by SP	Total stock value by Selling price for a location.

Purchase Order/Line Item Information

To get the details about the last vendors, last purchase prices for an item, etc., user needs to navigate to this section; snapshot of the portion is shown in (Figure 2.1.26).

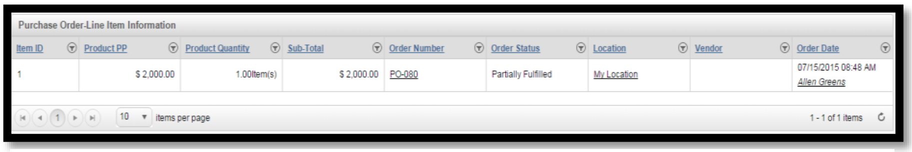


FIGURE 2.1.26

Purchase Order – Line Item Information	
Field	Description
Item ID	Unique id of an Item
Product PP	Purchase Price of a Product (per unit)
Product Quantity	Ordered quantity of the Product in a given PO.
Sub Total	Total amount of a PO.
Order Number	Unique purchase order number.
Order Status	Current status of the order.
Location	Location for which an item is ordered against a PO.
Vendor	Name of the Vendor to which the PO has been raised in the past to order the given item.
Order Date	Date on which the purchase order was raised.

Sales Order/Line Item Information

To get the details about the last selling prices, customers to which the product has been sold, etc. information for a product, user needs to navigate to the sales order section of the Product Detail page. Snapshot of the section is given in the (Figure 2.1.27).

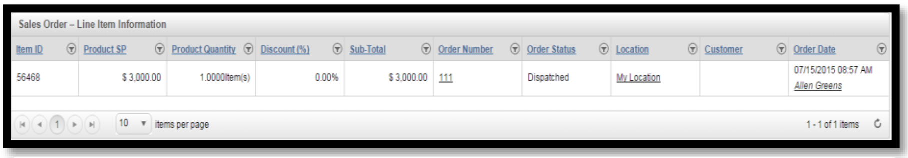


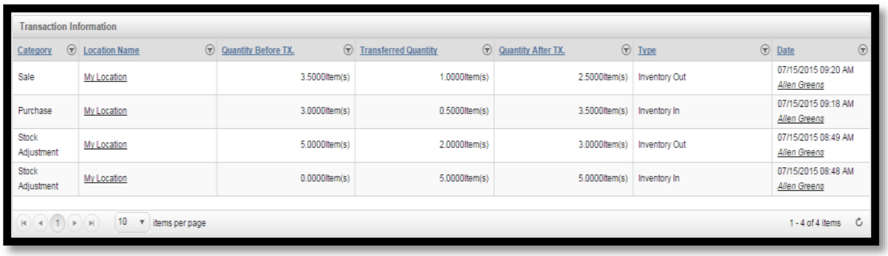
FIGURE 2.1.27

Sales Order – Line Item Information	
Field	Description
Item ID	Unique ID of the item
Product SP	Product selling price against a SO.
Product Quantity	Total quantity of the product ordered in a SO.

Discount (%)	Discount applied in a SO.
Sub-Total	Total amount for a SO.
Order Status	Current Status of the Order
Location	Location from which a particular sale was made.
Customer	Name of the Customer
Order Date	Order Date.

Transaction Information

To know about the Transactional details against IN/OUT/Transfers/Adjustments for a specific product, user needs to navigate to "Transaction Information" sections of the Product detail page. This section provides the information about the sale, purchase, stock adjustment and all the transaction of the product. Snapshot of the section is provided in the (Figure 2.1.28).



Transaction Information

Category	Location Name	Quantity Before TX.	Transferred Quantity	Quantity After TX.	Type	Date
Sale	My Location	3.5000Item(s)	1.0000Item(s)	2.5000Item(s)	Inventory Out	07/15/2015 09:20 AM Allen Greens
Purchase	My Location	3.0000Item(s)	0.5000Item(s)	3.5000Item(s)	Inventory In	07/15/2015 09:18 AM Allen Greens
Stock Adjustment	My Location	5.0000Item(s)	2.0000Item(s)	3.0000Item(s)	Inventory Out	07/15/2015 08:49 AM Allen Greens
Stock Adjustment	My Location	0.0000Item(s)	5.0000Item(s)	5.0000Item(s)	Inventory In	07/15/2015 08:48 AM Allen Greens

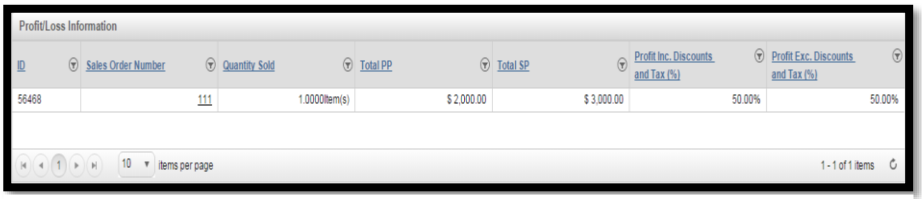
10 items per page 1 - 4 of 4 items

FIGURE 2.1.28

Transaction Information	
Field	**Description**
Category	Category of Transaction
Location Name	Name of the Location on which the transaction occurred
Quantity Before Tx.	Quantity before the transaction held
Transferred Quantity	Total quantity of the product transferred.
Quantity After Tx.	Quantity after transaction held
Type	Type of transaction (IN/OUT)
Date	Date of transaction held.

Profit & Loss Information

This section can be referred to know about the profit/loss details related to the specific product. Snapshot of the section is given in the **(Figure 2.1.29)**.


Profit/Loss Information

ID	Sales Order Number	Quantity Sold	Total PP	Total SP	Profit Inc. Discounts and Tax (%)	Profit Exc. Discounts and Tax (%)
56468	111	1.0000Item(s)	$ 2,000.00	$ 3,000.00	50.00%	50.00%

10 items per page 1 - 1 of 1 items

FIGURE 2.1.29

Profit/Loss Information	
Field	Description
ID	Unique ID
Sales Order number	Sales Order Number
Quantity Sold	Total quantity of the product sold
Total PP	Total purchase price
Total SP	Total selling Price
Profit Inc. Discounts and Tax (%)	Profit including discount and tax (%)
Profit Exc Discounts and Tax (%)	Profit excluding discount and tax (%)

Chapter 2: Purchase

You can raise a purchase order for a vendor to order a desired set of items and can fulfil the order to check in the corresponding order quantities in your inventory location. This set of documents provides knowledge on the features like

- Raising Purchase Order
- Manage Purchase Order
- Closed Purchase Order
- Manage Vendor

Raise Purchase Order

To raise new Purchase Order, user has to navigate to the "Raise Purchase Order" section; this option can be found in the Purchase drop down menu. The navigation of the menu is shown below.

To Raise New Purchase Order: (Home>>Purchase>>Raise Purchase Order**)**

1. Move the mouse pointer to the "Purchase" section on the menu bar, a drop down menu will be displayed, click on the 'Raise Purchase Order'.
2. After clicking on the 'Raise Purchase Order' a pop-up window will be displayed. Select the organization and the corresponding Business Unit through this window.
3. Click on Ok button; after selection of ownership, you will redirected to a new window. Snapshot of the window is shown in figure: 2.2.1

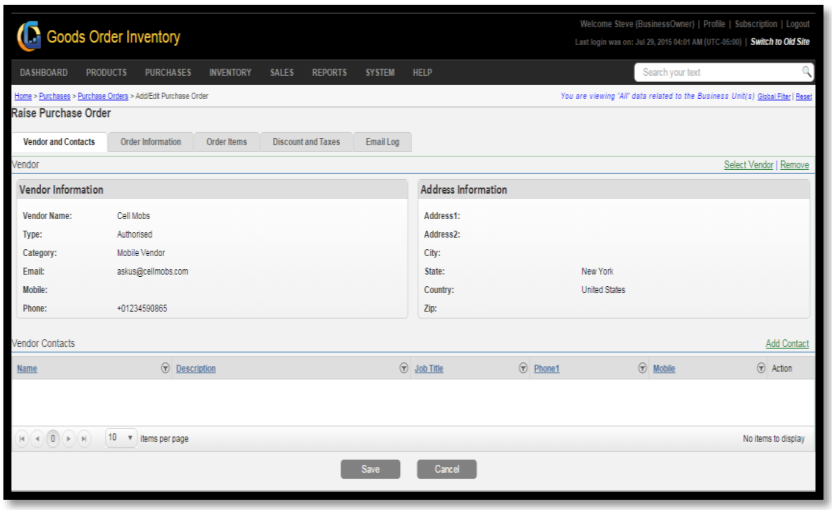


FIGURE 2.2.1

Steps for Raising a Purchase Order:

Step 1: To raise a new Purchase Order, user has to select the organization and the corresponding Business Unit

Step 2: After performing the first step, user needs to select a vendor.

Step 3: After selecting a vendor, user need to provide the Order Information in the given form.

Step 4: Choose tab (Order Items) to line-up multiple items in an order.

Step 5: Add Discount and Taxes –if any; using respective tab.

Vendors and Contacts Tab:

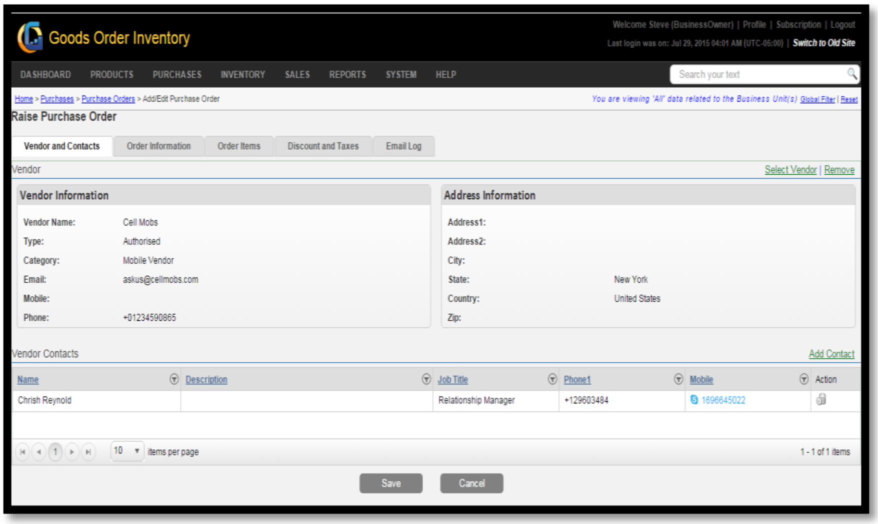


FIGURE 2.2.2

Field Name	Description
Vendor Name	Name of the vendor
Type	Type of the vendor
Category	Vendor category defined by the Business owner at the time of adding a vendor
Email	Email of the vendor
Mobile	Mobile number of the vendor
Phone	Phone number of the vendor
Address1	Address of the vendor:Line-1
Address2	Address of the vendor:Line-2
City	City of residence
State	State of residence
Country	Country of residence
Zip	Postal code of residence
Select Vendor	User can click on this hyperlink to select a vendor from the list of vendors that exist in your organization database.
Remove	Remove the current selected vendor
Add Contact	User can add the vendor related contact from the list of contacts.

Order Information Tab:

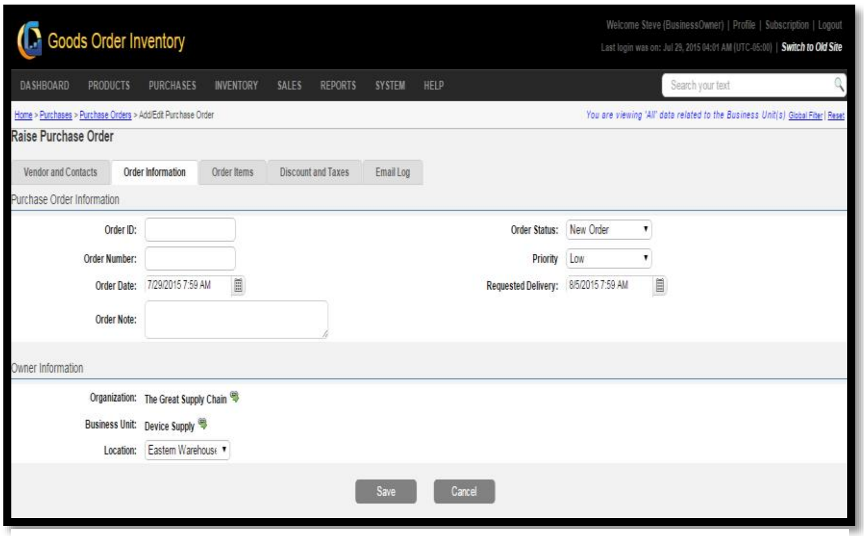


FIGURE 2.2.3

Field Name	Description
Order ID	System generated ID.
Order Number	System generated order number – on the basis of order format defined by business owner.
Order Date	User can set Order date by using the calendar.
Order Note	Special note on the order can be written in text field.
Order Status	User can set the order status from the dropdown option, • New Order • Sent to Vendor • Review
Priority	User can set the priority of the order, • Low • Medium • High • Immediate
Requested Delivery	User can set the requested delivery date for the purchase order.
Organization	Name of the Organization.
Business Unit	Name of the Business Unit.
Location	Name of the location.

Order Items Tab:

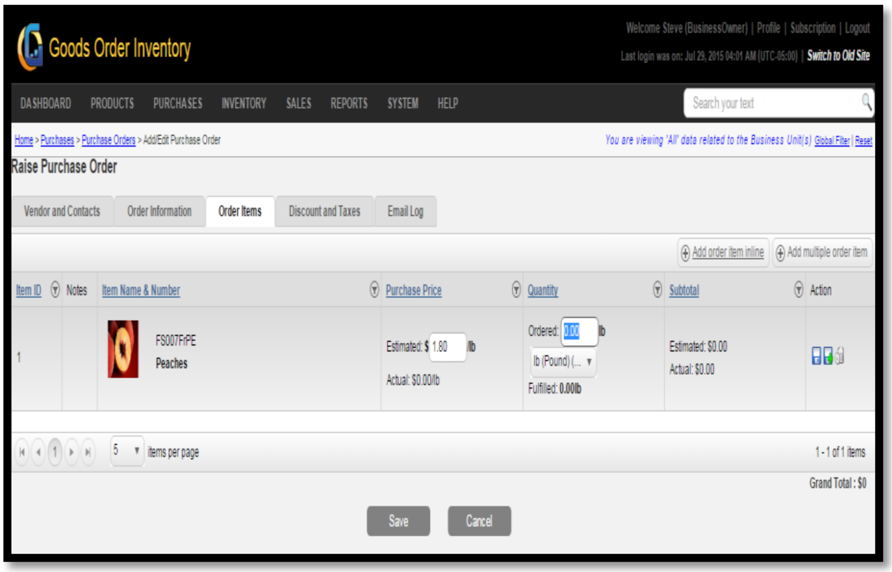


FIGURE 2.2.4

Field Name	Description
Item ID	Unique ID of the item.
Notes	Special notes about the Item.
Item Name &Number	Name and Number/SKU of an Item.
Purchase Price	Price on which the item is to be purchased.
Quantity	Quantity of the Item.
Sub Total	Total amount against an item; Estimated and Actual amounts may vary in case of multiple measurement units associated with a given item.
	Click on this icon to add item in order list.
	Click on this Icon to add current item in order list and add another row to add more items in an order list.
	Click on this icon to delete the item.

Discounts & Taxes Tab:

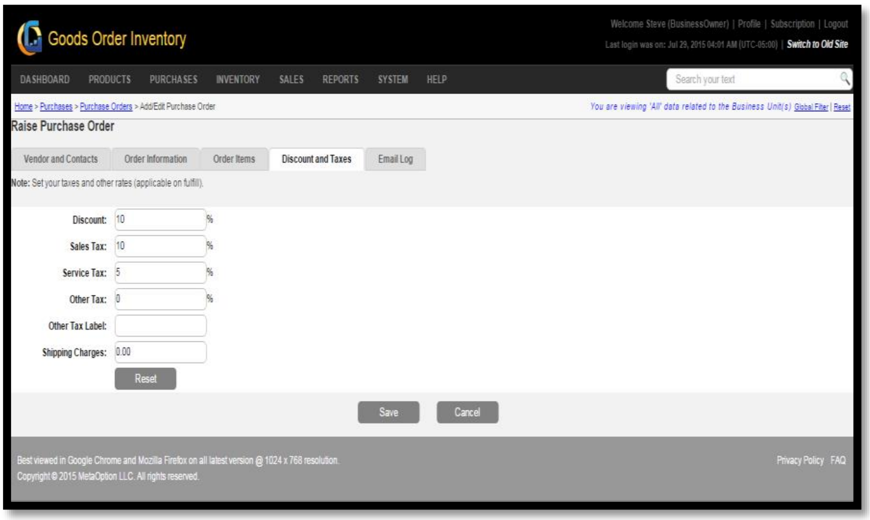


FIGURE 2.2.5

Field Name	Description
Discount	Applicable order level discount – if any.
Sales Tax	Applicable order level sales tax – if any.
Service Tax	Applicable order level service tax – if any.
Other Tax	Applicable order level - other tax – if any.
Other Tax Label	If other tax is applicable, mention label for other tax – if any.
Shipping Charge	Applicable order level shipping charges – if any.

Email Log Tab:

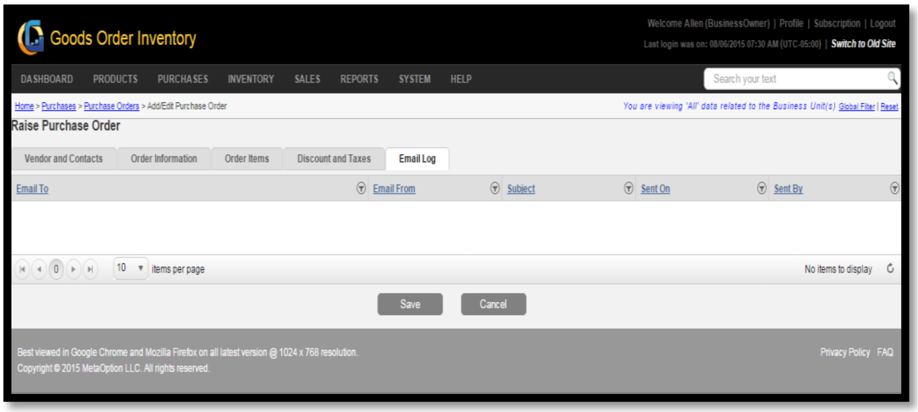


FIGURE 2.2.6

Field Name	Description
Email To	Destination mail Id
Email From	Source mail id
Subject	Subject of the mail
Sent On	Date on which the mail was sent
Sent By	Name of the person who sent the mail.

Manage Purchase Order

Manage Purchase Order provides a set of functionalities to manage the Raised Purchase Order. To manage Purchase Order, user has to navigate to the “Manage Purchase Orders” section this option can be found in the Purchase drop down menu. The navigation of the menu is shown below.

To Manage Purchase Order: (Home>>Purchase>>Manage Purchase Orders**)**

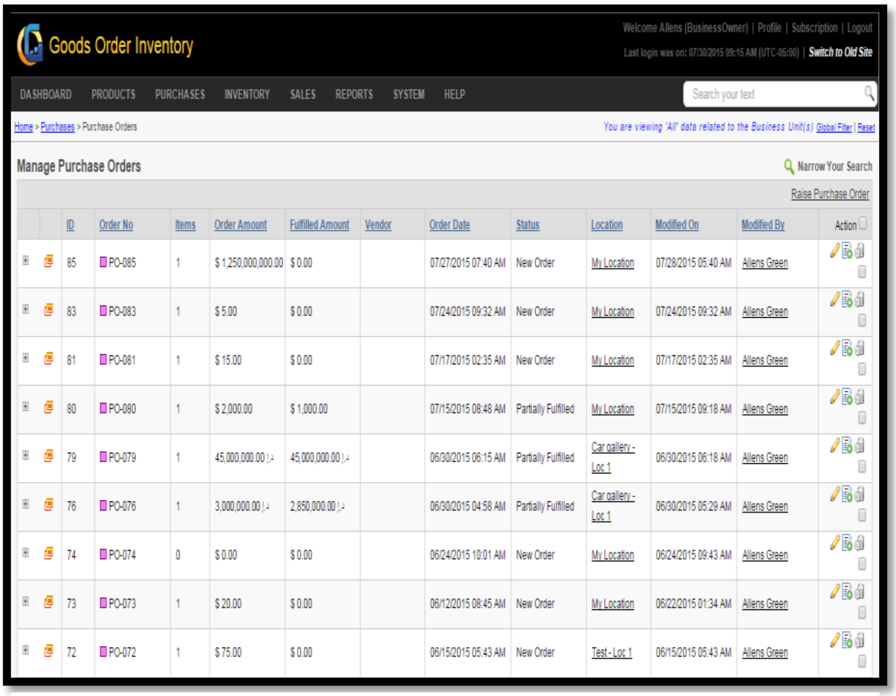


FIGURE 2.2.7

Field	Description
	Click on this icon to view the item associated with the specific purchase order.
	Click on this icon to see the order preview window containing the all details about a specific order.
ID	Unique Purchase order ID
Order No	Order Number – as per the order format defined by business owner.
	Showing the priority.
	Order Note – if any.
Items	Number of items in a purchase order.

Order Amount	Order Amount.
Fulfilled Amount	Fulfilled Amount.
Vendor	Name of the vendor.
Order Date	Date on which the order was raised.
Status	Current status of the order.
Location	Name of the Location.
Modified On	Date on which the order was modified.
Modified By	Name of the person who modified an order.
	Click on this icon to edit an order.
	Click on this icon to fulfill the specific order.
	Click on this icon to delete an order.
Raise Purchase Order	Click on this link to raise a new purchase order.

Closed Purchase Order

All the Purchase order which gets fulfilled or cancelled comes into this section, and is termed as Closed Purchase Order in the GOIS Pro. To view all Closed Purchase Orders list, the user has to navigate to the "Closed Purchase Order" section, this option can be found in the "Purchase" drop down menu. The navigation of the menu is shown below.

To view Closed Purchase Order: (Home>>Purchase>>Closed Purchase Order**)**

1. Move the mouse pointer to the "Purchase" section on the menu bar, a drop down menu will be displayed, click on the 'Closed Purchase Order'.
2. After clicking on the 'Closed Purchase Order', you will be redirected to the page shown below.

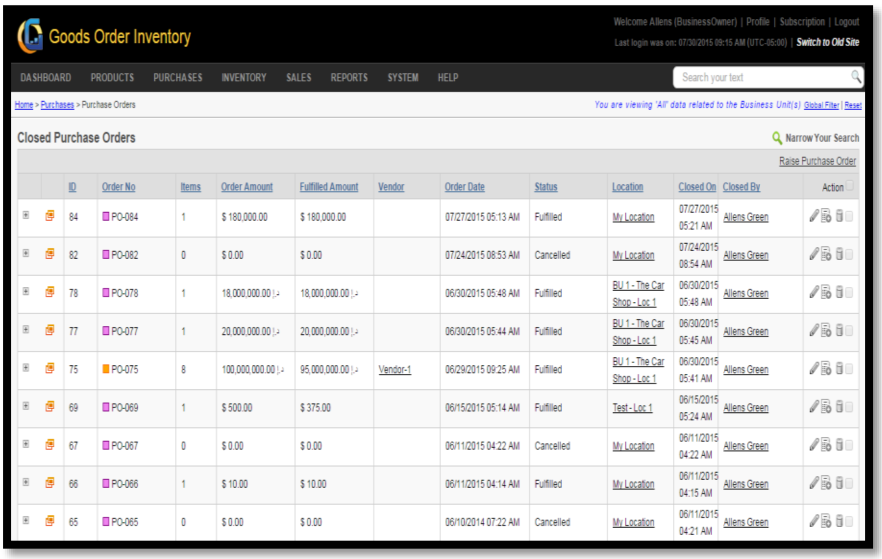


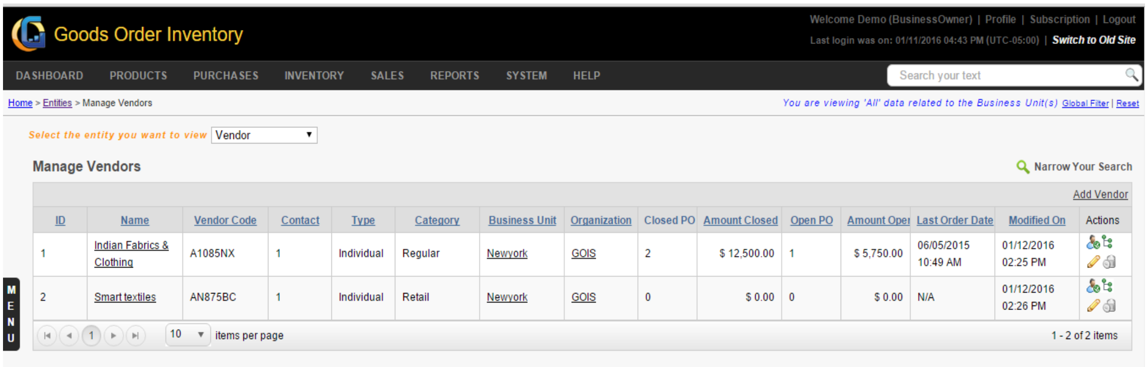
FIGURE 2.2.8

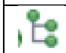
Field	Description
ID	System generated unique ID assigned to an order.
Order No	Order number sequence – as per the order format defined by a business owner.
Items	Number of items in an order.
Order Amount	Total amount of an order.
Fulfilled Amount	Fulfilled amount of an order.
Vendor	Name of the vendor for which the order has been raised.
Order Date	Date on which the order was raised.
Status	Current status of a specific order.
Location	Location for which the order was raised.
Modified On	Date on which the order is modified last.
Modified By	Name of the person who modified an order.

Manage Vendors

This section provides details related to managing a vendor into the system. To manage vendors, user has to navigate to the "Manage Vendors" section; this option can be found in the Purchase drop down menu. The navigation of the menu is shown below.

To Manage Vendors: (Home>>Purchase>>Manage Vendor**)**



Field	Description
ID	System generated vendor ID.
Vendor Name	Name of the vendor.
Vendor Code	User defined vendor code.
Type	Vendor type (user defined).
Category	Vendor category (user defined).
Business Unit	Name of the business unit with which the vendor is associated.
Organization	Name of an organization with which the vendor is associated.
Closed PO	Number of closed PO against a vendor.
Amount Closed	Total amount of all closed PO against a vendor.
Open PO	Number of open PO against a vendor.
Amount Opened	Total amount of all open PO against a vendor.
Contacts	Total count of vendor contacts.
Last Order Date	Last date on which the order has been received from a vendor.
Modified On	Date of modification.
	Click on this icon to edit a vendor detail.
	Click on this icon to delete a vendor.
	Click this icon to add a vendor contact.
	Click this icon to add a billing address.

Chapter 3: Inventory

GOIS-PRO inventory is considered as a warehouse or location in the system. As an organization can have 1 to N number of business units into the system and within each business unit, you can have 1 to N number of locations as warehouses where you will be maintaining your inventory. So this part of documentation contains the explanation that will help you to understand all the inventory related functions like managing and adding stock to each individual location, viewing individual stock entries that exists in a location, viewing quick stock available across all the locations, stock transfers across multiple locations, inventory stock adjustments for returned items, damaged or missing items, etc. The explanation will cover the below mentioned functionalities of GOIS Pro.

- View All Available Stock
- Stock Listing
- Stock Activity
- Stock Summary
- Manage Locations
- Archive (View Stock by Location)

View Stock by Location

To view stock by location, user has to navigate to the "View Stock by Location" section; this option can be found in the "Inventory" drop down menu. The navigation of the menu is shown below.

To View Stock by Location: (Home>>Inventory>>View Stock by Location >> Action – yellow icon on right (view available stock at this location)**)**

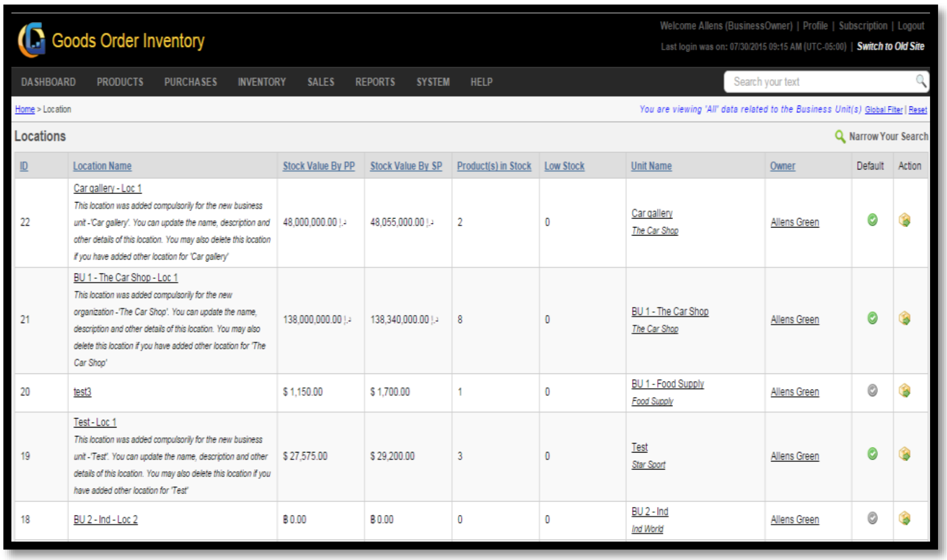


FIGURE 2.3.1

Field	Description
ID	System generated unique ID
Location Name	Name of the location the stock belongs to.
Stock Value by PP	Total value of the stock by Purchase Price.
Stock Value by SP	Total value of the stock by Selling Price.
Product(s) in Stock	Unique products (count) available in a given location.
Low Stock	Low stock product count.
Unit Name	Name of the Business Unit.
Owner	Name of the Business Owner.
Default	Default Location for a business unit.
Action	View available stock at this location

Note: When a user clicks on the given Action Icon adjacent to each location listed. The User will be redirected to another page, displaying the list of items available in a given location. The listing page also contains all the relevant details of the items in stock at a location. For each individual product, an entry will be shown in the screen. For each product, there might be one or more entries into the stock. User may explore each individual product to view its corresponding stock entries by clicking on the Action icon given in right of the screen which says "View stock entries".

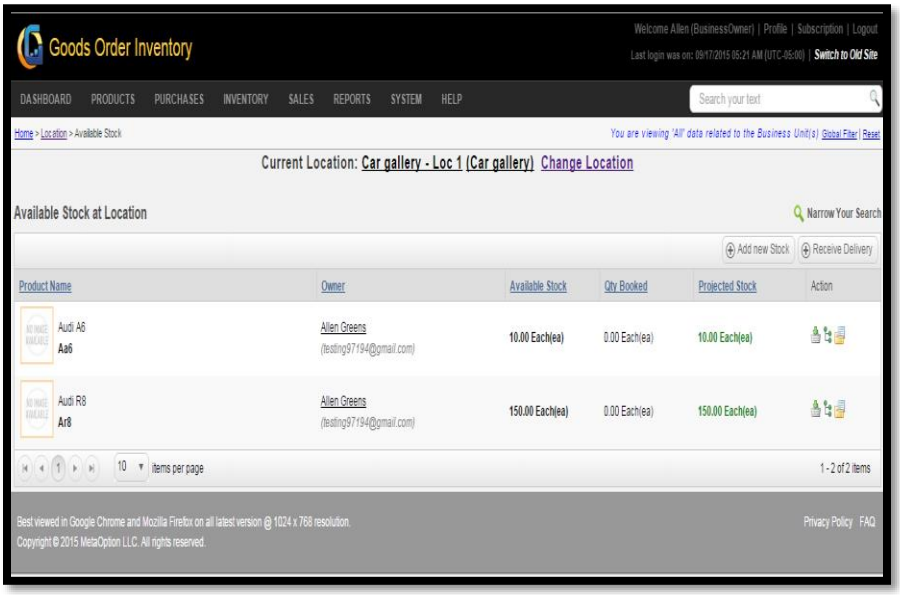


FIGURE 2.3.2

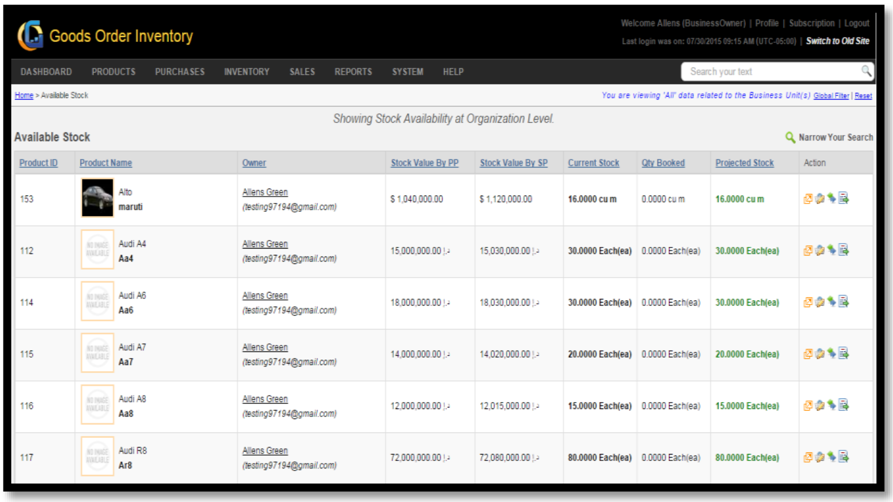
Available Stock at Location	
Field	Description
Product Name	Name and number of a product.
Owner	Name of the owner.
Available Stock	Total available stock of an item at a given location.
Qty Booked	Quantity booked from the Available stock.
Projected Stock	Quantity in hand available for sale.
Action	Click on this icon to import stock from another location.
Action	Click on this icon to see all the stock entries of the specific item that exist into the system.
Action	Click on this icon to view all transaction details related to the specific item.

View All Available Stock

To view All Available Stock within an organization as a whole (that might reside across different business units and locations), the user has to navigate to the "View All Available Stock" section, this option can be found under the "Inventory" drop down menu. The navigation of the menu is shown below.

To view All Available Stocks: (Home>>Inventory>>View All Available Stock)

Field	Description
Product ID	Unique - system generated ID of a product.
Product Name	Name and number of a product.
Owner	Name of the Owner.
Stock value by PP	Total value of a given product stock under an organization (by purchasing price).
Stock value by SP	Total value of a given product stock under an organization (by selling price).
Current Stock	Current stock (total quantity including booked quantities)
Qty Booked	Quantity Booked
Projected Stock	Total stock/quantity available for sale – on hand quantity.
	Click on this icon to show the detailed preview of an item.
	Click on this icon for stock adjustment.
	Click on this icon to transfer stock between locations and business units.
	Click to show transaction details.

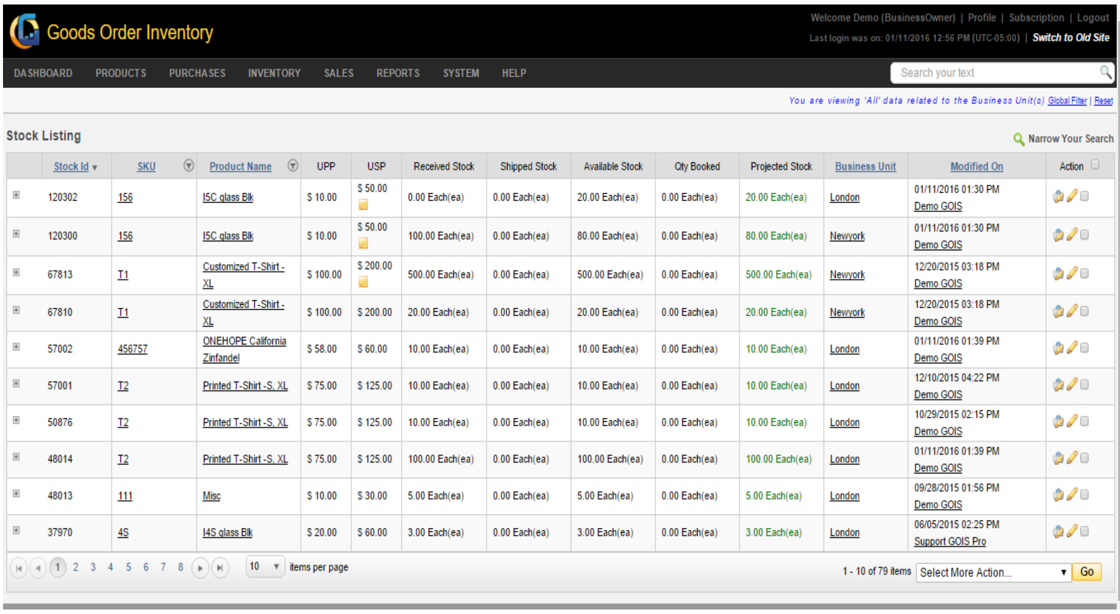


Stock Listing

Stock listing section allows a user to look for individual product stock entries with quantity information at a business unit level.

Field	Description
Stock ID	System generated unique Stock ID.
SKU	Unique number of a product/Product Number/SKU#
Product Name	Name of a Product
UPP	Unit Purchase Price for a given stock entry.
USP	Unit Sale Price for a given stock entry.
Received Stock	Total qty. received in an individual stock entry for a given product.
Shipped Stock	Total qty. shipped from an individual stock entry for a given product.
Available Stock	Total qty. available in an individual stock entry for a given product (including booked qty.)
Qty Booked	Total qty. booked from an individual stock entry for a given product.
Projected Stock	Total qty. available for sale from an individual stock entry for a given product.
Business Unit	Business Unit where stock is residing.
Modified On	The Date-Time on which the stock information is modified.
	Click on the pencil icon to edit the details of a specific stock.
	Click on this icon to adjust the stock.

Figure Stock Listing

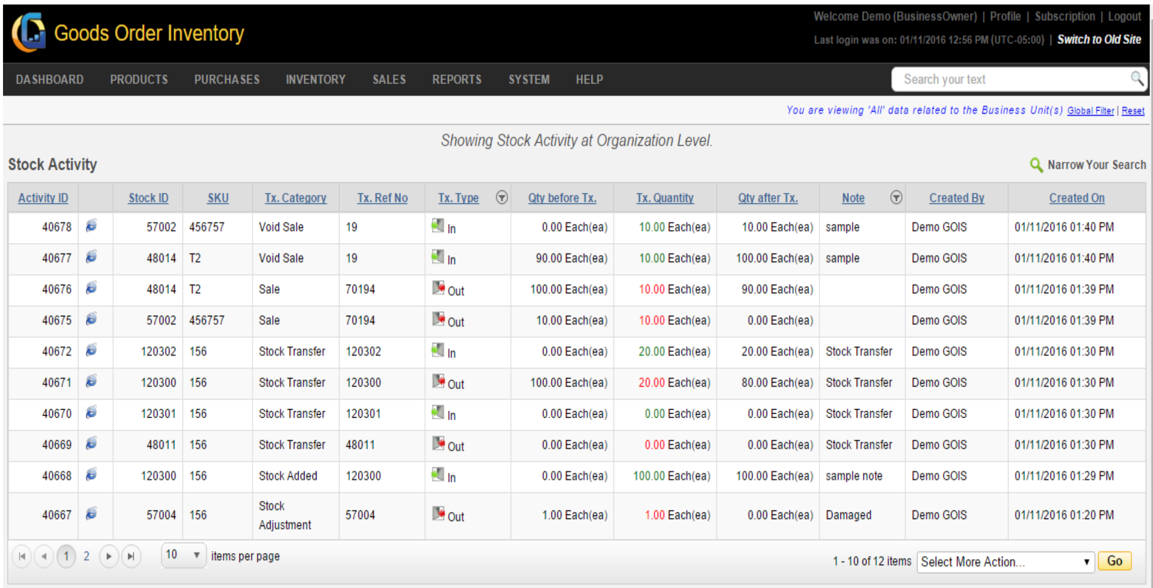


Stock Activity

Stock activity section allows a business owner to track all the IN/OUT transaction details for a given stock entry on the basis of unique Stock ID.

Field	Description
Activity ID	System generated unique ID against an activity in a given stock entry.
Stock ID	Stock ID on which the activity has been performed.
SKU	Unique number of a product/Product Number/SKU#
Tx. Category	Category of a transaction.
Tx. Ref No.	Transaction reference number.
Tx. Type	Type of transaction (IN/OUT).
Qty before Tx.	Total qty. available in an individual stock before a transaction.
Tx. Quantity	Total qty. transacted from an individual stock entry for a given product.
Qty. after Tx.	Total qty. available in an individual stock after transaction.
Note	Transaction Note.
Created By	User who performed a transaction in a specific stock.
Created On	The Date-Time on which the transaction has been done on stock.

Figure Stock Activity


Goods Order Inventory

Welcome Demo (BusinessOwner) | Profile | Subscription | Logout

Last login was on: 01/11/2016 12:56 PM (UTC-05:00) | Switch to Old Site

DASHBOARD PRODUCTS PURCHASES INVENTORY SALES REPORTS SYSTEM HELP

Search your text

You are viewing 'All' data related to the Business Unit(s) Global Filter | Reset

Showing Stock Activity at Organization Level.

Stock Activity

Narrow Your Search

Activity ID		Stock ID	SKU	Tx. Category	Tx. Ref No	Tx. Type	Qty before Tx.	Tx. Quantity	Qty after Tx.	Note	Created By	Created On
40678		57002	456757	Void Sale	19	In	0.00 Each(ea)	10.00 Each(ea)	10.00 Each(ea)	sample	Demo GOIS	01/11/2016 01:40 PM
40677		48014	T2	Void Sale	19	In	90.00 Each(ea)	10.00 Each(ea)	100.00 Each(ea)	sample	Demo GOIS	01/11/2016 01:40 PM
40676		48014	T2	Sale	70194	Out	100.00 Each(ea)	10.00 Each(ea)	90.00 Each(ea)		Demo GOIS	01/11/2016 01:39 PM
40675		57002	456757	Sale	70194	Out	10.00 Each(ea)	10.00 Each(ea)	0.00 Each(ea)		Demo GOIS	01/11/2016 01:39 PM
40672		120302	156	Stock Transfer	120302	In	0.00 Each(ea)	20.00 Each(ea)	20.00 Each(ea)	Stock Transfer	Demo GOIS	01/11/2016 01:30 PM
40671		120300	156	Stock Transfer	120300	Out	100.00 Each(ea)	20.00 Each(ea)	80.00 Each(ea)	Stock Transfer	Demo GOIS	01/11/2016 01:30 PM
40670		120301	156	Stock Transfer	120301	In	0.00 Each(ea)	0.00 Each(ea)	0.00 Each(ea)	Stock Transfer	Demo GOIS	01/11/2016 01:30 PM
40669		48011	156	Stock Transfer	48011	Out	0.00 Each(ea)	0.00 Each(ea)	0.00 Each(ea)	Stock Transfer	Demo GOIS	01/11/2016 01:30 PM
40668		120300	156	Stock Added	120300	In	0.00 Each(ea)	100.00 Each(ea)	100.00 Each(ea)	sample note	Demo GOIS	01/11/2016 01:29 PM
40667		57004	156	Stock Adjustment	57004	Out	1.00 Each(ea)	1.00 Each(ea)	0.00 Each(ea)	Damaged	Demo GOIS	01/11/2016 01:20 PM

1 2 10 items per page

1 - 10 of 12 items Select More Action... Go

Stock Summary

Stock summary section allows a user to track total available stock and stock cost at an organization, business unit and location level against a product or SKU#.

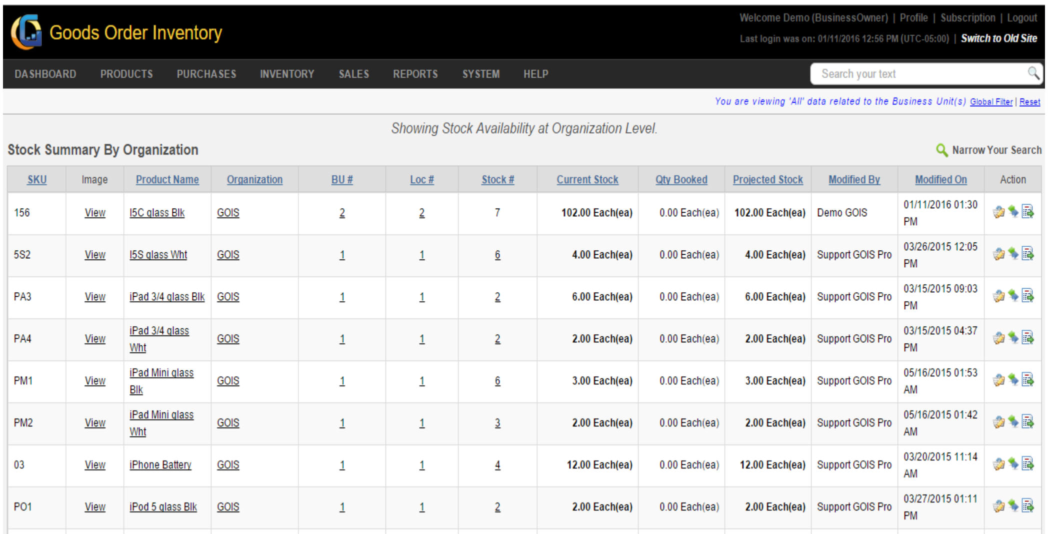
Organization

Track total stock available at an organization level for a given product.

Field	Description
SKU	Unique number of a product/Product Number/SKU#
Image	Click on View to see the mapped image of a product.
Product Name	Name of a product.
Organization	Owner organization of a product.
BU#	Click number to see the business units where the stock is available for a given product.
Loc#	Click number to see the locations where the stock is available for a given product.
Stock#	Click number to see the individual stock entries and stock IDs across different locations and business units for a given product.
Current Stock	Total qty. available under an organization for a given product (including booked qty).

Qty. Booked	Total qty. booked from current stock under an organization for a given product.
Projected Stock	Total qty. available for sale under an organization for a given product.
Modified By	User who recently modified the stock for a given product.
Modified On	Date-Time on which the stock has been modified.
	Click this icon to make stock adjustment for a product.
	Click this icon to transfer the stock from one location to another for a given product.
	Click this icon to see the associated transactions for a product.

Figure Summary by Organization



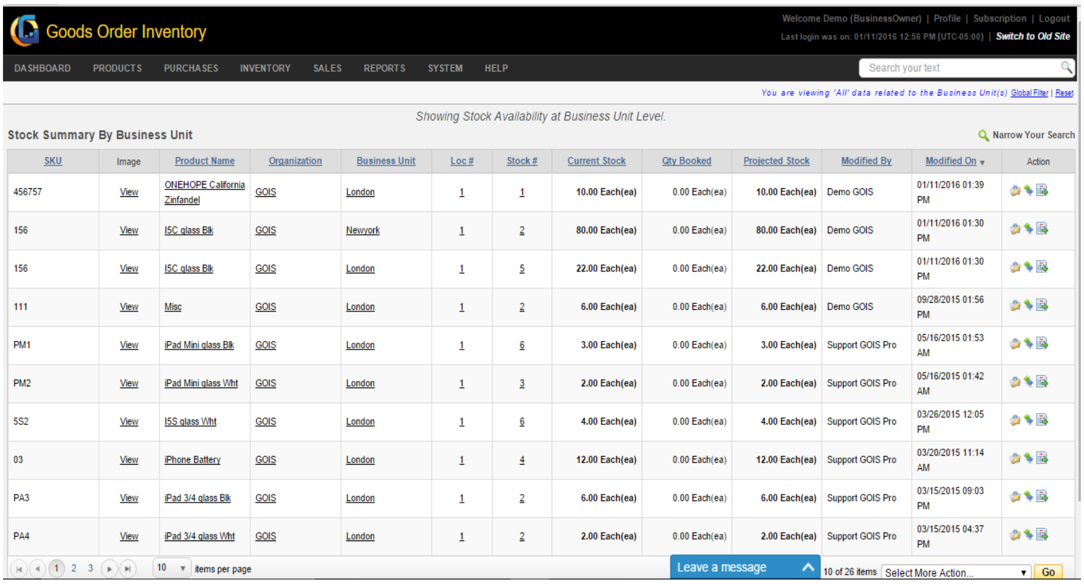
Business Unit

Track total stock available at business unit level for a given product.

Field	Description
SKU	Unique number of a product/Product Number/SKU#
Image	Click on View to see the mapped image of a product.
Product Name	Name of a product.
Organization	Owner organization of a product.

BU	Owner business unit for a product's stock.
Loc#	Click number to see the locations where the stock is available for a given product and corresponding location IDs.
Stock#	Click number to see the individual stock entries and stock IDs across different locations and business units for a given product and to check the lifecycle of a given stock entry.
Current Stock	Total qty. available under a business unit for a given product (including booked qty).
Qty. Booked	Total qty. booked from current stock under a business unit for a given product.
Projected Stock	Total qty. available for sale under a business unit for a given product.
Modified By	User who recently modified the stock for a given product.
Modified On	Date-Time on which the stock has been modified.
	Click this icon to make stock adjustment for a product.
	Click this icon to transfer the stock from one location to another for a given product.
	Click this icon to see the associated transactions for a product.

Figure Summary by Business Unit



SKU	Image	Product Name	Organization	Business Unit	Loc #	Stock #	Current Stock	Qty Booked	Projected Stock	Modified By	Modified On	Action
456757	View	ONEHOPE California Zinfandel	GOIS	London	1	1	10.00 Each(ea)	0.00 Each(ea)	10.00 Each(ea)	Demo GOIS	01/11/2016 01:39 PM	
156	View	I5C glass Blk	GOIS	Newyork	1	2	80.00 Each(ea)	0.00 Each(ea)	80.00 Each(ea)	Demo GOIS	01/11/2016 01:30 PM	
156	View	I5C glass Blk	GOIS	London	1	5	22.00 Each(ea)	0.00 Each(ea)	22.00 Each(ea)	Demo GOIS	01/11/2016 01:30 PM	
111	View	Misc	GOIS	London	1	2	6.00 Each(ea)	0.00 Each(ea)	6.00 Each(ea)	Demo GOIS	09/28/2015 01:56 PM	
PM1	View	iPad Mini glass Blk	GOIS	London	1	6	3.00 Each(ea)	0.00 Each(ea)	3.00 Each(ea)	Support GOIS Pro	05/16/2015 01:53 AM	
PM2	View	iPad Mini glass Wht	GOIS	London	1	3	2.00 Each(ea)	0.00 Each(ea)	2.00 Each(ea)	Support GOIS Pro	05/16/2015 01:42 AM	
5S2	View	I5S glass Wht	GOIS	London	1	6	4.00 Each(ea)	0.00 Each(ea)	4.00 Each(ea)	Support GOIS Pro	03/26/2015 12:05 PM	
03	View	iPhone Battery	GOIS	London	1	4	12.00 Each(ea)	0.00 Each(ea)	12.00 Each(ea)	Support GOIS Pro	03/20/2015 11:14 AM	
PA3	View	iPad 3/4 glass Blk	GOIS	London	1	2	6.00 Each(ea)	0.00 Each(ea)	6.00 Each(ea)	Support GOIS Pro	03/15/2015 09:03 PM	
PA4	View	iPad 3/4 glass Wht	GOIS	London	1	2	2.00 Each(ea)	0.00 Each(ea)	2.00 Each(ea)	Support GOIS Pro	03/15/2015 04:37 PM	

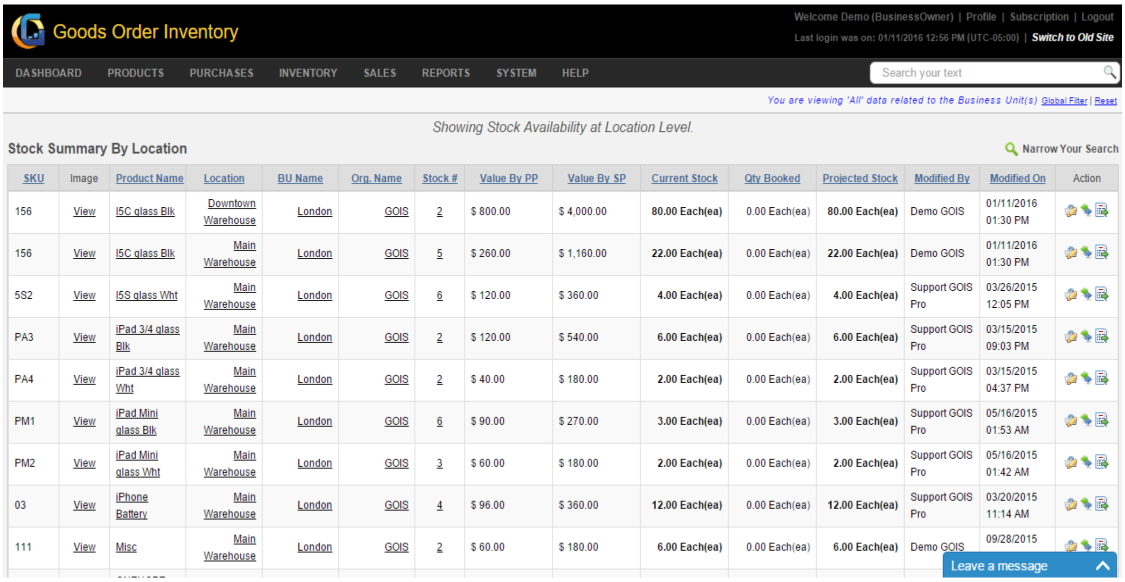
1 2 3 10 items per page Leave a message 10 of 26 items Select More Action... Go

Location

Track total stock available at location level for a given product.

Field	Description
SKU	Unique number of a product/Product Number/SKU#
Image	Click View to see image.
Product Name	Name of a product.
Location	Location under which total stock resides.
BU Name	Business Unit name corresponds to location ownership.
Org. Name	Organization name corresponds to business unit and location ownership.
Stock #	Number of stock entries in a given location (Clickable to track stock entry lifecycle).
Value by PP	Stock value by Purchase Price for a location.
Value by SP	Stock value by Sales Price for a location.
Current Stock	Total qty. available under a location for a given product (including booked qty).
Qty. Booked	Total qty. booked from a location for a given product.
Projected Stock	Total qty. available for sale under a location for a given product.
Modified By	User who recently modified the stock for a given product.
Modified On	Date-Time on which the stock has been modified.
	Click this icon to make stock adjustment for a product.
	Click this icon to transfer the stock from one location to another for a given product.
	Click this icon to see the associated transactions for a product.

Figure Summary by Location



Manage Location

This section of document covers how to add new locations/warehouses, edit and delete existing location (s). In general, default location of a business unit can't be deleted. To manage a location information, user may navigate to the "Manage Location" section; this option can be found under the "Inventory" drop down menu. The navigation of the menu is shown below.

To edit Location: (Home>>Inventory>>Manage Location)

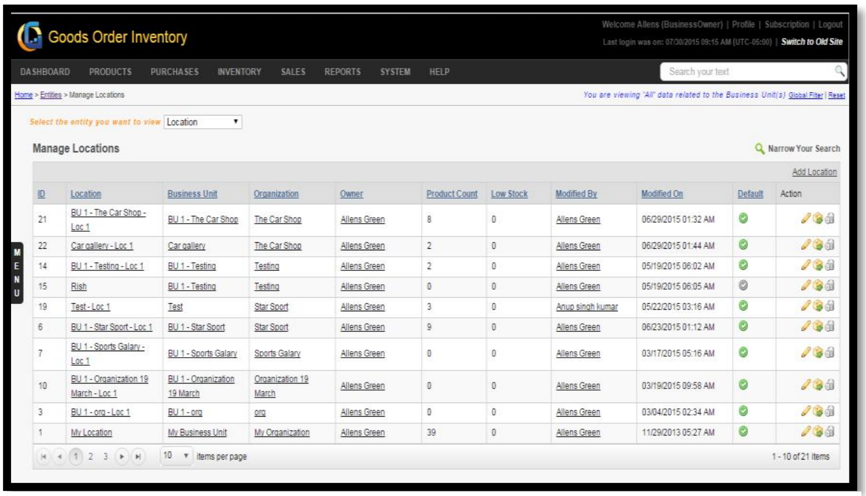


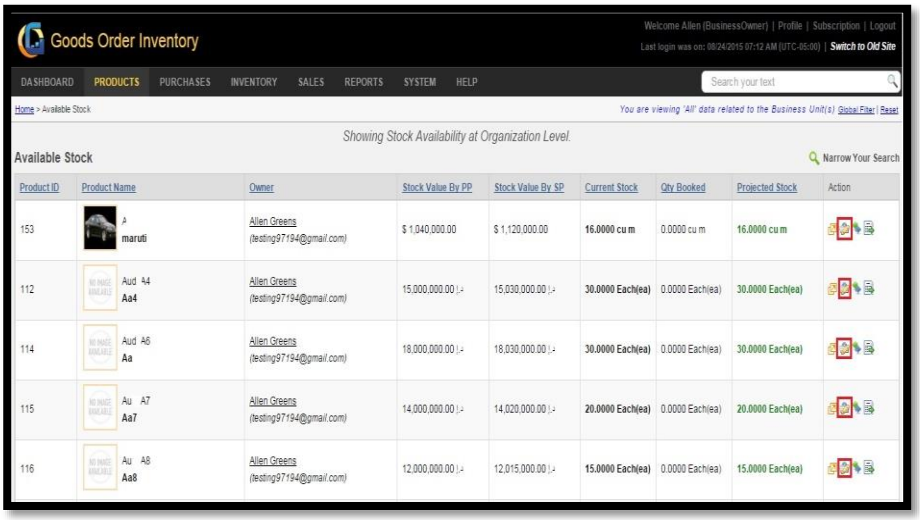
FIGURE 2.3.3

Field	Description
ID	System generated unique location ID.
Location	Name of the Location – click on Location name to view the location details.
Business Unit	Name of the Business Unit – click on Business unit name to view details.
Organization	Name of the Organization – click on the organization name to view details.
Owner	Ownership of location (Business Owner).
Product Count	Total number of different products available at a location.
Low Stock	Count of low stock items at a location.
Modified By	Name of the user who modified the Location.
Modified On	The Date on which the location information is modified.
Default	The Green icon shows the default location of a given business unit.
	Click on the pencil icon to edit the details of a location.
	Click on the yellow icon to view the available stock at a location and perform the activities on the stock.
	Click on the icon to delete a location.

Stock Adjustment

Stock adjustment is a feature provided by GOIS Pro to Add or Deduct a specific quantity of the product in the stock. There are different scenarios where a business owner might need to do the necessary stock adjustments into their inventory like for damaged goods, missing items, stolen items, others, returns, etc. User can choose pre-defined reason for the adjustment or they can provide other reason.

Product Adjustment: (Home>>Inventory>>View All Available Stock>> Action (Click on the given icon says "Adjust this Product"**)**



(Figure 2.3.4)

Note: After clicking on the icon marked in the **(Figure 2.3.4)** a new pop-up window will appear screenshot of that is shown in **(Figure 2.3.5)**.

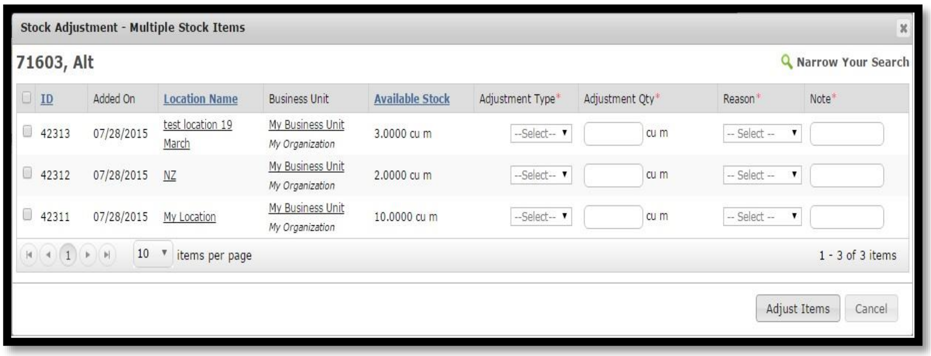


FIGURE 2.3.5

<u>**Steps for Stock Adjustment**</u>**:**

Step 1: Click on the checkbox adjacent to the ID of the Stock you want to adjust.

Step 2: After clicking on the checkbox, all the disabled fields get enabled.

Step 3: Select the adjustment type **Deduct or Add** from the dropdown according to the requirement.

Step 4: Fill the Quantity you want to adjust on your inventory under Adjustment Qty Field.

Step 5: Select the Reason from the list of predefined reasons or select "Other" for any other reason apart from the reason listed.

Step 6: Write an adjustment note in the Note field.

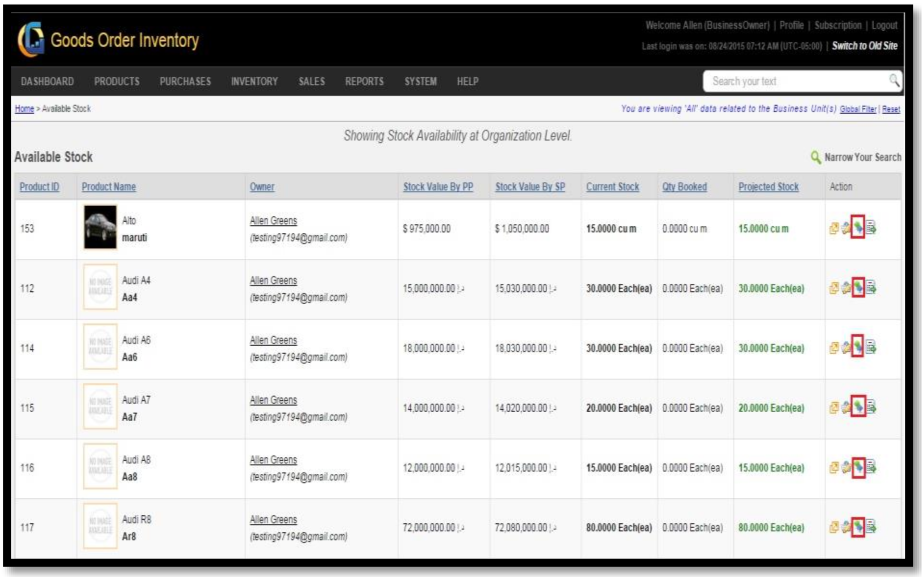
Step 7: After filling all the required fields, click on the Adjust Items button to process the adjustment into the system.

Step 8: After clicking on the Adjust Items button, a pop up will appear asking for the confirmation of the user. Click on Ok, a success message will be displayed if the adjust got completed in the system.

Transfer Stock

In a multi-location and multi business unit environment within an organization, there might be some situations where you need to transfer the stock from one location to another or across different business units to make the product available for sale. To fulfill this requirement GOIS Pro provides a feature to transfer stock from one location to another.

To Transfer Stock: (Home>> Inventory >>View All Available Stock>> Action (Click on the given icon says "Transfer Stock Between Location"**)**



(Figure 2.3.6)

Note: After clicking on the icon highlighted in **(Figure 2.3.6)**, a pop up window will be sown screen shot of the window is given in **(Figure 2.3.7)**.

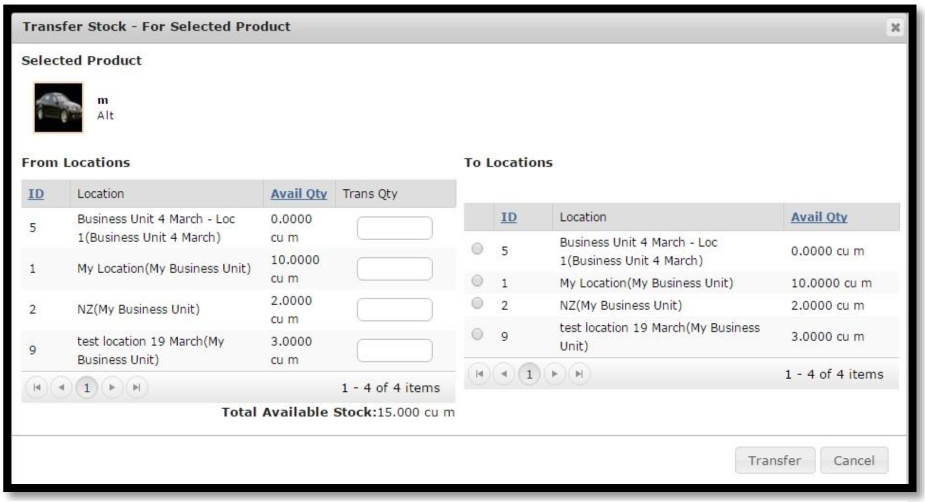


FIGURE 2.3.7

<u>Steps to Transfer stock:</u>

Step 1: Click on the icon highlighted in **(Figure 2.3.6)**

Step 2: After clicking on the icon a popup window will be as shown in **(Figure 2.3.7)**

Step 3: Enter the quantity to be transferred under "from" location" section and then click on the desired radio button adjacent to the location under "To Locations" section.

Step 4: Please keep in mind that "From" and "To" location can't be same. Click on the "Transfer" Button.

Step 5: After clicking on the Transfer Button a success message will be shown in case of successful transfer.

Import stock

An organization with multiple locations/business units can have distributed stock at different locations; GOIS pro provides a feature to import stock from different location to the current location.

To Import Stock: (Home>> Inventory >> Manage Location >> Action (click on yellow icon says 'view available stock at this location') >> Action (Import stock from other locations **)**

<u>Steps to Import Stock:</u>

<u>Step 1:</u> Move the mouse pointer to the "Inventory" section on the menu bar, a drop down menu will be displayed, click on the "Manage Locations". You will be redirected to a new page, screen shot of the page is shown in **(Figure 2.3.8)**.

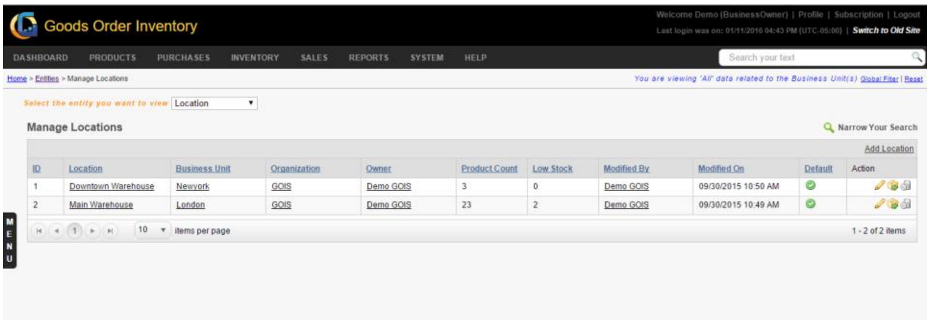


FIGURE 2.3.8

<u>Step 2:</u> Click on the Action button adjacent to the location in which you want to import the stock from another location. On clicking, you will be redirected to another page showing the available stock of all the products, screen shot of the page is shown in **(Figure 2.3.9)**.

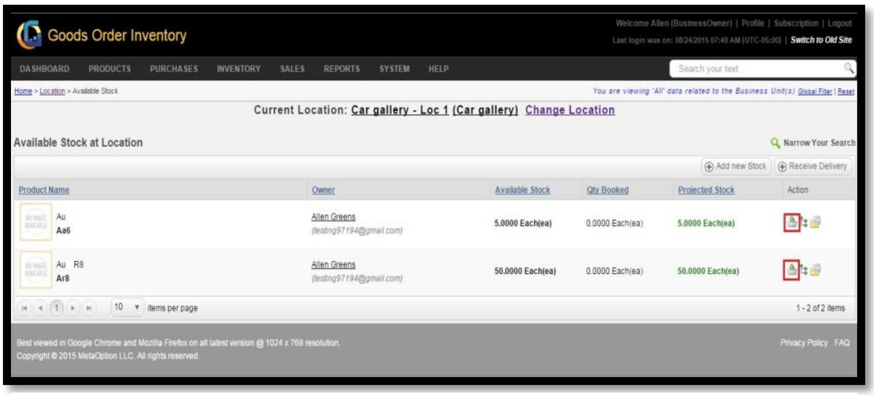


FIGURE 2.3.9

<u>Step 3:</u> Under the Action column, click on the import icon highlighted in **(Figure 2.3.9)**, on clicking, a pop-up window will be displayed snapshot of the window is shown in **(Figure 2.3.10)**.

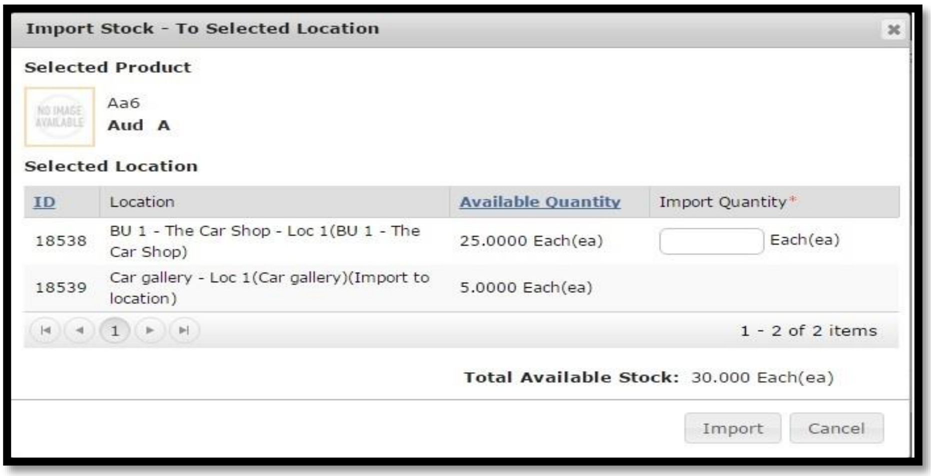


FIGURE 2.3.10

Step 4: Enter the quantity you want to import from desired location under the import quantity text box and then, hit the Import Button.

Note: The quantity of import must be less than or equal to the quantity available at a chosen location.

Step 5: After clicking the Import Button, a success message will be shown.

Chapter 4: Sales

In this section of document, we will discuss the procedure that a user needs to follow to perform all the sales related operations within the GOIS Pro system. Based on the business owner sale settings, a user can make a sale to their customers to deduct their inventory or can make a sale directly using product list; without affecting the inventory. Moving forward under this section, you would be able to understand how to punch a sales order, manage sales orders, view all closed sales orders and manage customers. This section of documentation broadly covers the below mentioned points.

- Punch Sales Order
- Manage Sales Order
- Closed Sales Order
- Voided Sales Order
- Manage Customer

Punch Sales Order

For selling items to your customers, you may punch a sales order either by using the inventory or without using the inventory. To punch a new Sales Order, the user has to navigate to the "Punch Sales Order" section; this option can be found under the "Sales" drop down menu. The navigation of the menu is shown below.

To Punch New Sales Order: (Home>>Sales>>Punch Sales Order)

Steps for Punching a Sales Order:

1. Move the mouse pointer to the "Sales" section on the menu bar, a drop down list will be displayed, click on the "Punch Sales Order".
2. After clicking on the 'Punch Sales Order' a popup window will be displayed. Select the organization and the business unit through this window to choose the ownership of a sales order.

Click on Ok Button, you will redirected to a new window (Punch Sales Order). A Snapshot of the window is shown below.

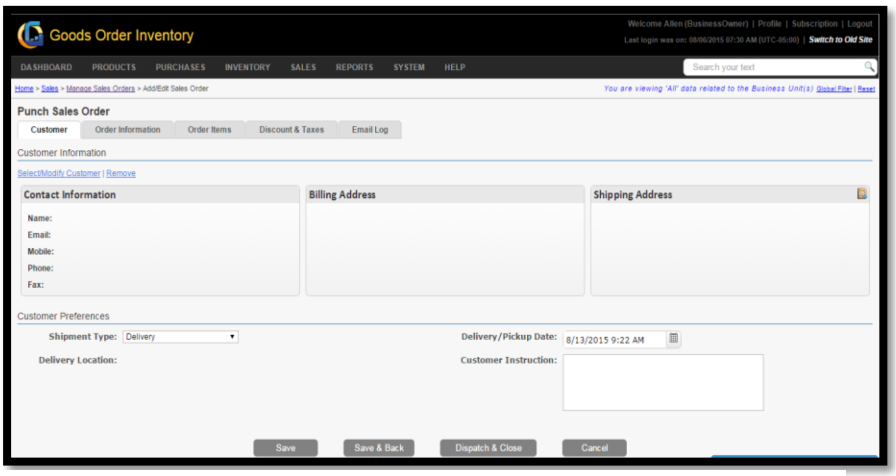


FIGURE 2.4.1

3. Under Customer (Tab), the user may choose a customer; if already defined under customer list. Hit Select/Modify customer.
4. After selecting a customer, user has to fill the Order Information.
5. Click on Order Items (tab) to line up the desired items to be sold by hitting the button **(Add Multiple Order Items)** and provide the necessary details of items like selling price, quantity to be sold, item note, etc. Default product prices (editable) will be populated automatically for each item.
6. After lining up the items, go to Discount and Taxes (tab) to provide the applicable discounts and taxes for a sales order (optional).
7. After providing all the necessary information for a sales order, user must click on “Save” button to save the order.
8. Once the user saves the order, the dispatch button will be activated. On hitting the Dispatch & Close button, the order will be dispatched and will go under closed sales order section.

Note: Any modifications in a sales order can be done until and unless the order is in open state, once a user has dispatched a sales order, the related transactions and affected inventory quantities can’t be rolled back to the inventory again in any case due to business safety and data consistency reasons. However necessary stock adjustments can be made in the inventory at any stage to adjust the stock quantities.

Customer Tab: In this section, you need to provide all the necessary information related to the customer to which you are going to make a sale.

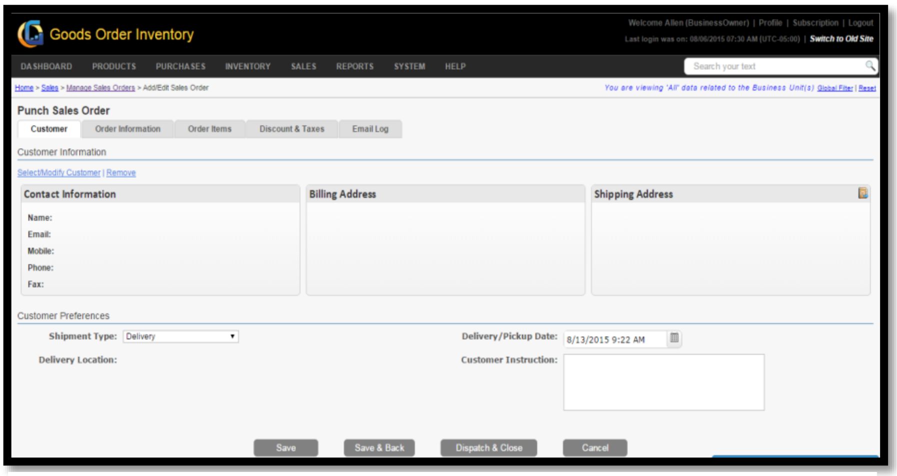


FIGURE 2.4.2

Field	Description
Select/Modify Customer	Click on this link to select a customer from the list or to change a customer.
Remove	Remove the selected customer.
Name	Name of a customer.
Email	e-mail id of a customer
Mobile	Mobile number of a customer
Phone	Landline number of a customer
Fax	Fax number of a customer
Shipment Type	Shipment can be of two types either 'Delivery' or 'Pickup'
Delivery Location	Inventory location from where the order will be picked up or the location where the order has to be delivered.
Delivery/Pickup Date	Date, when to deliver or Pickup
Customer Instruction	Special Instruction by the Customer (if any) with respect to the delivery or Pickup.
Save	Click on this button to save the sales order. After clicking on Save button, order will be created/saved and the user will stay on the same page.
Save & Back	Save the Sales Order and redirect user to the "manage sales order" section.
Dispatch & Close	Dispatch the sales order and make the "status" as close.
Cancel	Cancel the current process.

Order Information Tab: In this section, you need to provide all the necessary order related information to make the order management and future reference easier.

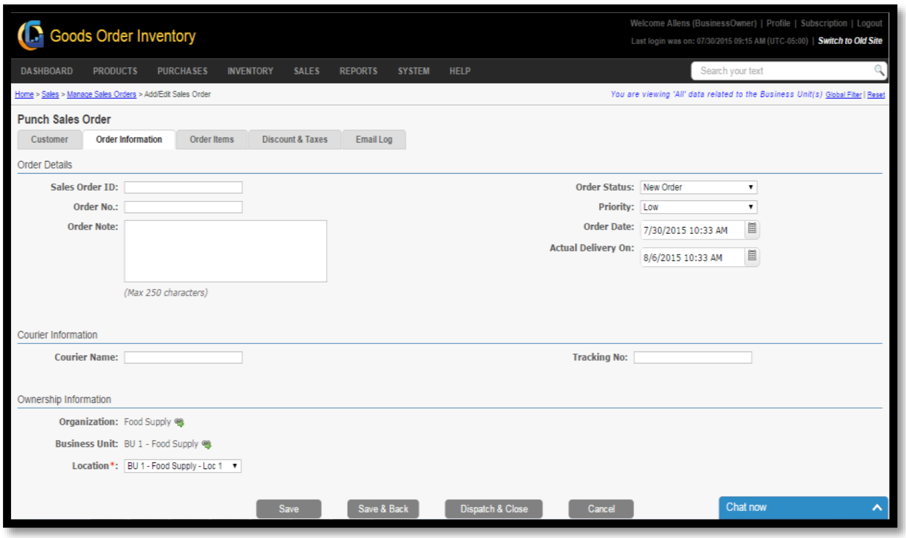
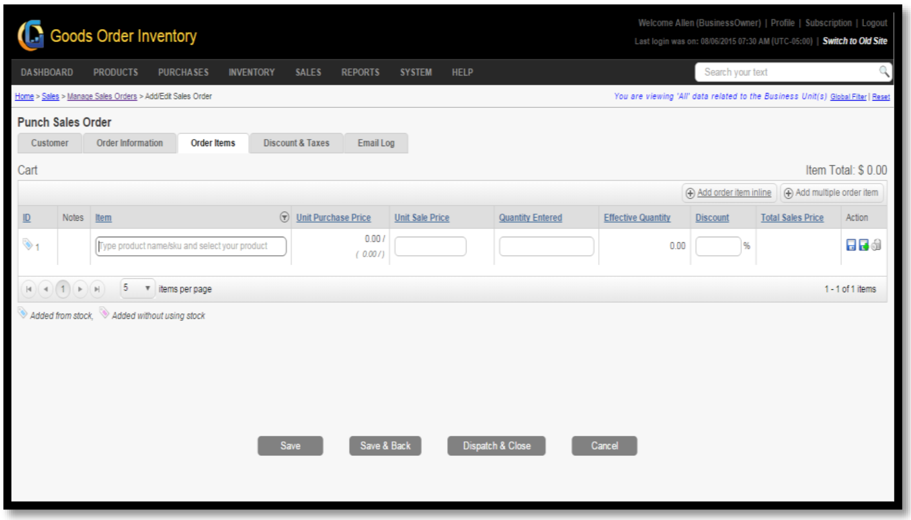


FIGURE 2.4.4

Field	Description
Sales Order Id	System generated unique order ID for a new sales order.
Order No	Order number generated by system on the basis of the sales order, number format defined by the business owner under settings.
Order Note	Any note that user wants to enter with respect to the order.
Courier Name	Name of the Courier
Organization	Name of the organization under which the order is created.
Business Unit	Name of the Business Unit under which the order is created.
Location	Name of the location under which the order is created.
Order Status	Status of the Order.
Priority	Priority of the Order.
Order date	The Date on which the Order is punched.
Actual Delivered on	The Date on which the order needs to be dispatched and dispatched on actual.
Tracking No.	Tracking number of dispatched order.

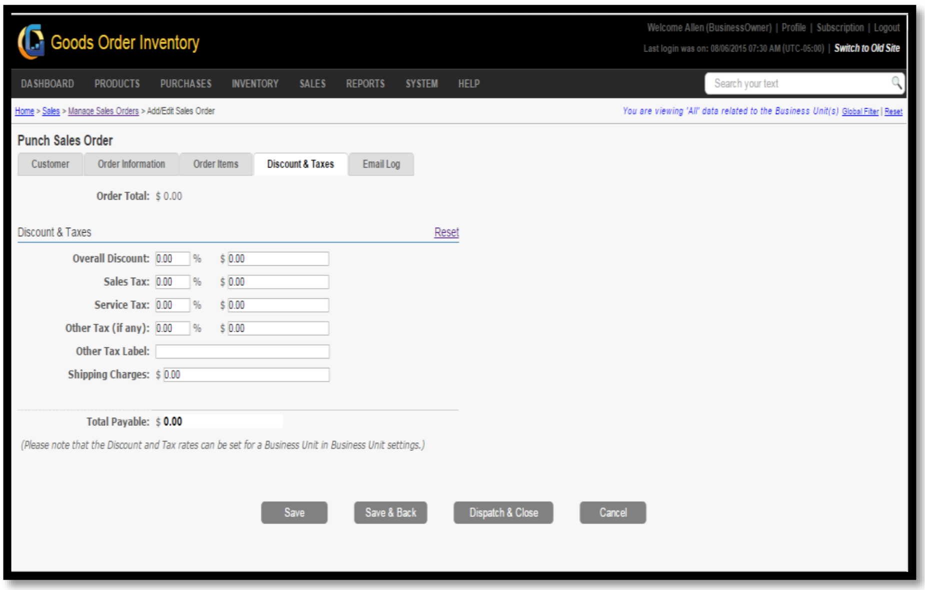
Order Item Tab: In this section, you need to add desired number of line items for a given sales order which you are going to sell to your customer.



Field	Description
ID	System generated item ID for an order.
Note	Notes related to the line item.
Item	Name of the line Item.
Unit Purchase Price	Purchase Price Per Unit of selected item.
Unit Sale Price	Sale Price Per Unit of selected item.
Quantity Entered	Enter the quantity to be ordered for the selected item.
Effective Quantity	The Total ordered quantity of an item on the basis of the selected measurement unit.

Discount	Item discount (if any).
Total Sales Price	The Total sales price of an item (calculated by the system).
	Click on this icon to Add the Item (must for adding).
	Click on this icon to Add the current item and create a new row for adding new items.
	Click on this icon to delete the line item.
Add Order Item inline	Click on this button to add order line items.
Add Multiple Order Items	Click on this button to quickly add multiple line items in an order (item list selection).

Discount & Taxes Tab: In this section, user may add the desired amount of discounts and taxes applicable to a given sales order



Field	Description
Order Total	Total order amount excluding order level discounts and taxes.
Reset	Reset discounts and taxes for an order.
Overall Discount	Overall discount; if applicable for an order.
Sales Tax	Sales tax to be added in an order.
Service Tax	Service tax to be added in an order.
Other Tax (If any)	Other taxes; if applicable.
Other Tax Label	Label for Other Tax (user defined); as per the requirement.

Shipping charge	Order shipping charge to be added.
Total Payable	Total payable amount (including order total and discounts/taxes).
Save	Save the discounts and order.
Save & Back	Save the discounts and go back to manage sales section.
Dispatch & Close	Dispatch the order.
Cancel	Cancel the changes made to the order.

Manage Sales Order

To Manage Sales Order, the user has to navigate to the "Manage Sales Order" section, this option can be found under the "Sales" drop down menu. The navigation of the menu is shown below.

To Manage Sales Order: (Home>>Sales>>Manage Sales Order)

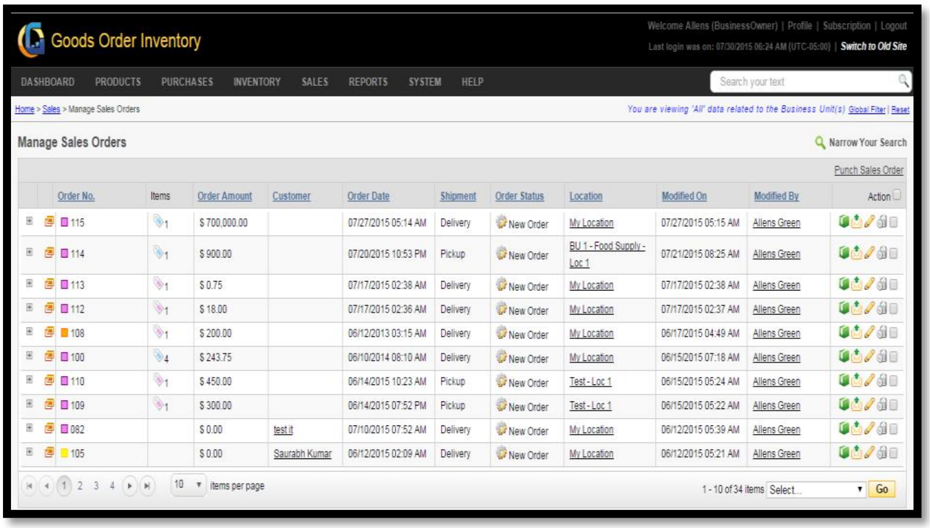


FIGURE 2.4.6

Field	Description
	Click on the icon to see the line items of an order.
	Click on the icon to see the Order Preview.
Order Number	System generated unique order number; as per the user defined sales order number format settings.
Priority	Priority of an order.
Item	Number of line items.

Order Amount	Total amount of an order.
Customer	Name of the customer to which the sales have been made.
Order Date	The Date on which the order is created.
Shipment	Type of the shipment.
Order Status	Current status of the Order
Location	Location name under which the order has been made.
Modified On	Last modified date on which the changes have been made to an order.
Modified By	Name of the person who modified the order information.
	Click on the icon to dispatch and close the sales order.
	The user can send order details to an email or to the customer email directly by clicking on this icon.
	Click on this icon to edit sales order details.
	Click on this icon to delete a sales order.
Punch sales Order	Click on this link to punch a new sales order.

Closed Sales Orders

To check the history of all dispatched sales orders, user can view the list of all closed sales orders and can check the corresponding order details, user has to navigate to the "Closed Sales Order" section, this option can be found under the "Sales" drop down menu. The navigation of the menu is shown below.

Note: Due to data consistency reasons and to maintain business safety, any closed/dispatched sales order cannot be modified or deleted by the user.

To view Closed Sales Order: (Home>>Sales>>Closed Sales Orders)

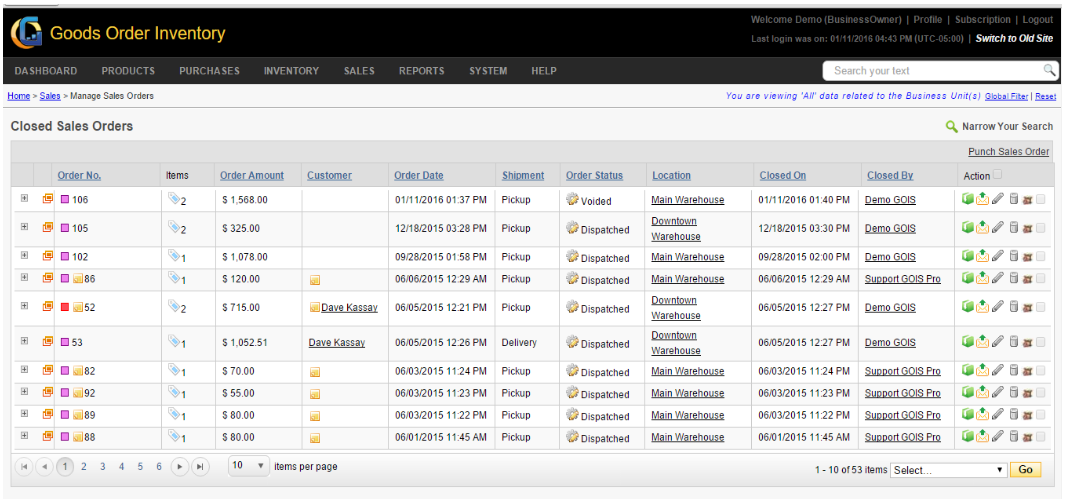
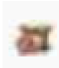
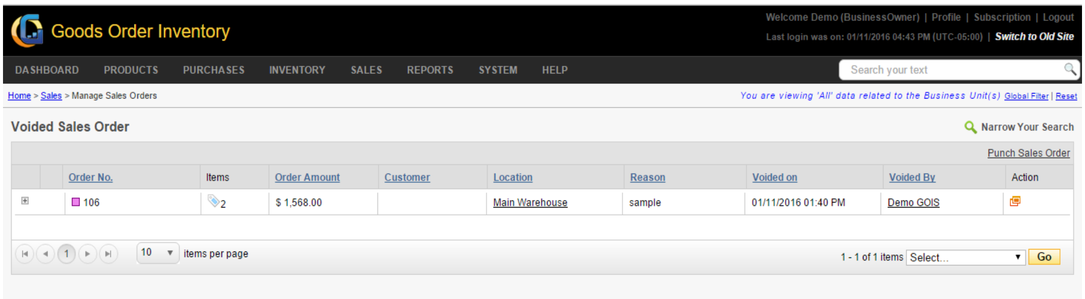


FIGURE 2.4.7

Field	Description
	Click on this icon to see the line items associated with the sales order.
	Click on this icon to see the details of an order as a preview.
Order No	System generated unique sales order number.
Items	Number of line item(s) in an order.
Order Amount	Total amount of the order.
Customer	Name of the customer associated with an order.
Order Date	The Date on which the order is punched.
Shipment	Type of shipment
Order Status	Current status of the Order
Location	Location under which the order has been made.
Closed On	The date on which the order has been closed.
Closed By	Name of the person/user, who closed the order.
Action	Click  Email icon to send email to a desired email ID and click on  void icon to void a closed sales order.
Punch sales Order	Click on this link to punch a new sales order.

Voided Sales Order

To check all voided sales orders: (Dashboard>>Sales>>Voided Sales Orders)



Manage Customer

To Manage Customer and their details, user has to navigate to the "Manage Customer" section, this option can be found in the "Sales" drop down menu. The navigation of the menu is shown below.

To Manage Customer: (Home>>Sales>>Manage Customer)

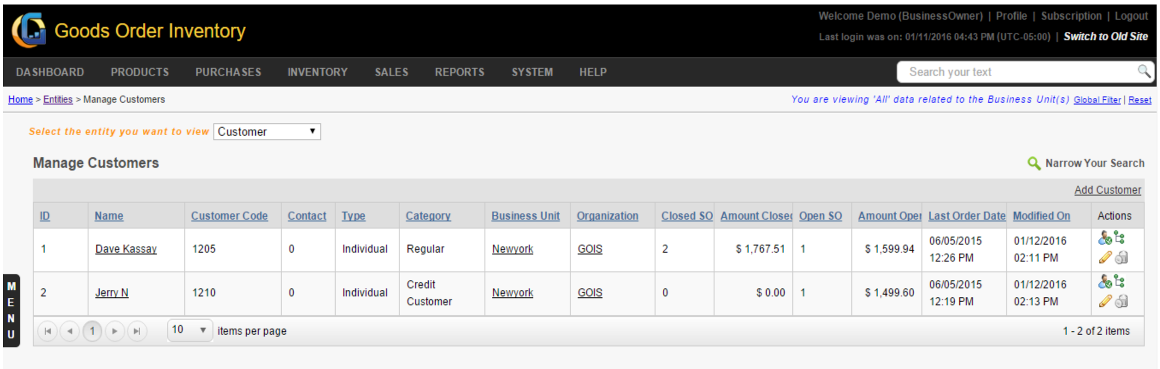


FIGURE 2.4.8

Field	Description
ID	System generated customer ID
Customer Name	Name of a customer
Customer Code	User defined code for a customer.
Contact	Number of contacts associated with a customer.
Type	User defined customer type.
Category	User defined customer category.
Organization	The name of an organization with which a customer is enrolled.
Business Unit	Name of the Business Unit to which the customer is enrolled.
Closed SO	Number of closed orders.
Amount Closed	Total amount of all closed SO.
Open SO	Number of open SO.
Amount Open	Total amount of all open SO.
Owner	Name of a Business Owner.
Address	Address of a customer.
Shipping Address	Shipping address of a Customer.
Last Order Date	Last ordering date from a given customer.
Modified On	Date of last modification.
	Click on this icon to edit the customer details.
	Click on this icon to add shipping address.
	Click on this icon to delete a customer.
	Click Here to add a new customer contact.

Steps to Add New Customer:

Step 1: Move the mouse pointer onto the Sales section of the menu bar. In the drop down select Manage Customer.

Step 2: The window will redirect you to another page, this window will show the list of customers added. If there is no any record, the list will be blank. Click on the Add Customer link at the right.

Step 3: An ownership window will pop-out asking to choose the Organization and its corresponding Business Units with which you want to associate a given customer. Click Ok.

Step 4: On clicking OK button, an add customer window will be displayed. Fill all the customer details and address details fields and click save button.

Step 5: After filling all the necessary information, click on save button, doing so the customer details will be saved and the customer gets added to the list.

Part 3: Users

In addition with multiple organizations, multiple business units and multiple locations, GOIS-PRO also allows you to work in a multiuser environment. A business owner can have N number of sub users within the same account. Each sub user will be having an assigned role to restrict the permission set. GOIS-PRO has pre-defined set of roles like business admin, business manager and sales execution under a business owner. Business owner has all the privileges and is not restricted against any given functionality. Further while defining a sub user, business owner may map the desired business unit(s) to a given sub user to give the permission on a business unit's data.

To View Users: (Home>>System>>Users**)**
Users page shows the list of all users that exist into the system with different privileges. User role define the capability of a given sub user to perform functions into the system, different user roles have different privilege of viewing and editing data and to perform activities into the system.

1. Move the mouse pointer to the "System" section on the menu bar, a drop down sub menu will be displayed.
2. Click on the 'Users', in the dropdown.
3. You will be redirected to another window; snapshot of the window is shown below **(Figure 3.1)**.

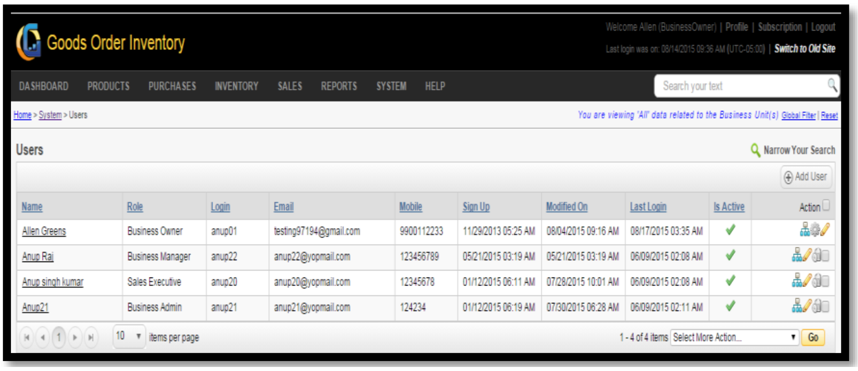


FIGURE 3.1

Users	
Field	Description
Name	Name of the user (click on Name to view the details).
Role	Role of the user into the system
Login	Login ID (Credential)
Email	Email address
Mobile	Mobile number
Sign up	Date & Time of sign up.
Modified On	Date & Time of last modification.
Last Login	Date & Time of last login.
Is Active	This field shows the current status of a user.
	Click on this icon to show the hierarchy of a user.
	Click on this icon to edit the details of a specific user.
	Click on this icon to delete a user.

✔	Click on this icon to activate/deactivate the specific user.

Add New User

To Add a new user into the system, you have to navigate to the User listing page and then click on the Add User button shown in **(Figure 3.2)**.

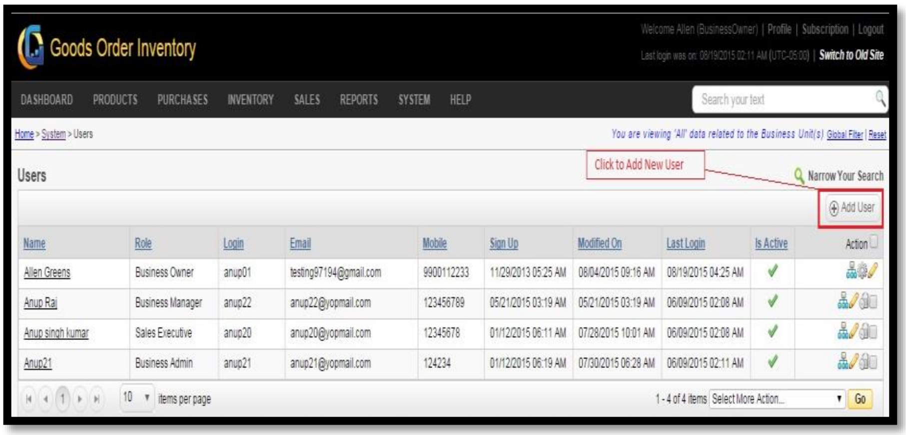


FIGURE 3.2

Steps to Add New User:

Step1: Click on the Add User Button, on clicking a new popup window will be displayed, asking to link a sub user with one or multiple Business Units. **(Figure 3.3)**

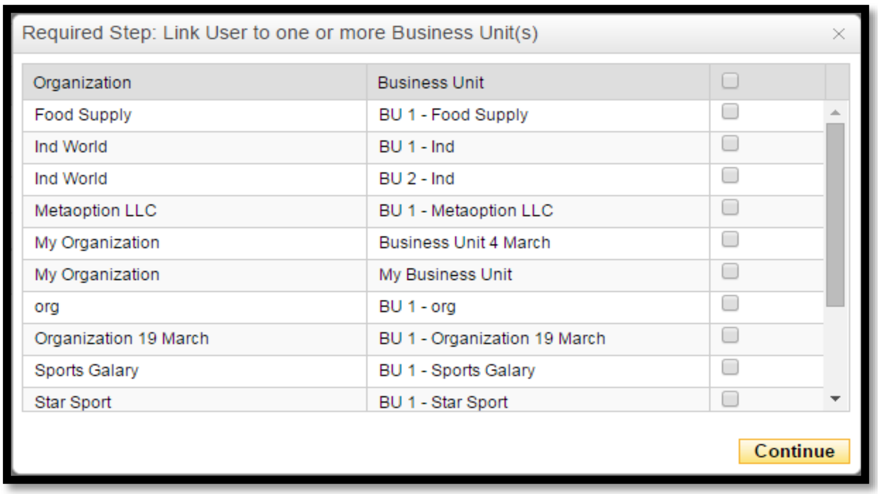


FIGURE 3.3

Step2: Mark the checkbox(s) to select single or multiple Business Units you want to associate with a new user, and then click on the Continue button.

Step3: After clicking on the Continue button, you will be redirected to another page, asking for the details about the user to be created. **(Figure 3.4)**.

General Tab:

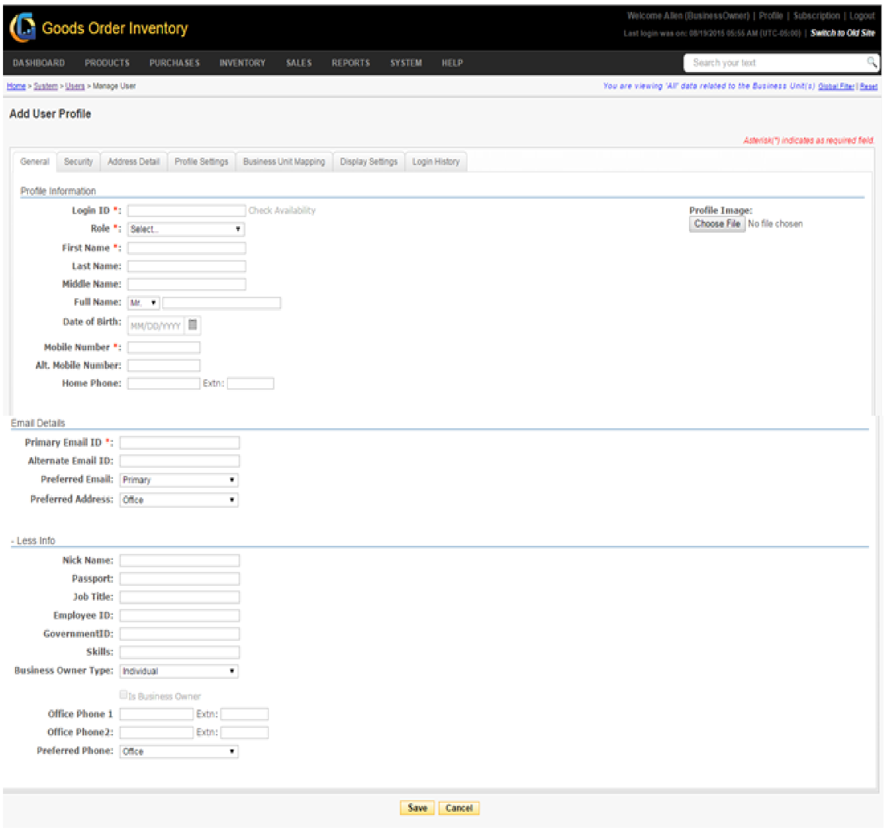


FIGURE 3.4

Profile Information	
Field	Description
Login ID	User credential (login ID) to login into the system (unique).
Check Availability	Click to check availability of login ID.
Role	Assign a role to the sub user from predefined role set.
First Name	First name of the user
Last Name	Last name of the user
Middle Name	Middle name of the user
Full Name	Full name of the user
Date of Birth	Date of birth of the user
Mobile Number	Mobile number of the user
Alt. Mobile Number	Alternate mobile number of the user
Home Phone	Phone number of home
Extn	Extension of phone number
Profile Image	Set an image for the user profile

Email Details	
Field	Description
Primary Email ID	Provide the primary email ID for contact (unique).
Alternate Email ID	Provide an alternate Email ID for contact.
Preferred Email	Preferred mail ID (Primary or Alternate).
Preferred Address	Preferred Address.

More Info	
Field	Description
Nick Name	Nick name of the user.
Passport	Passport id number.
Job Title	Title of the user's job in an organization.
Employment ID	User's employee ID
Government ID	Government ID
Skills	Skills of the user
Business Owner Type	Business Owner Type
Office Phone 1	Office Phone Number
Office Phone 2	Office Phone Number
Preferred	With Most Priority (Office, Home or Mobile)

Step 4: After filling all the necessary details under general tab, click on the security tab, a new window will appear. Snapshot of the window is shown in **(Figure 3.5)**.

Security Tab:

Security Tab provides you a flexibility to maintain the security of a user account. You can change the password, activate security questions and see the last password change date.

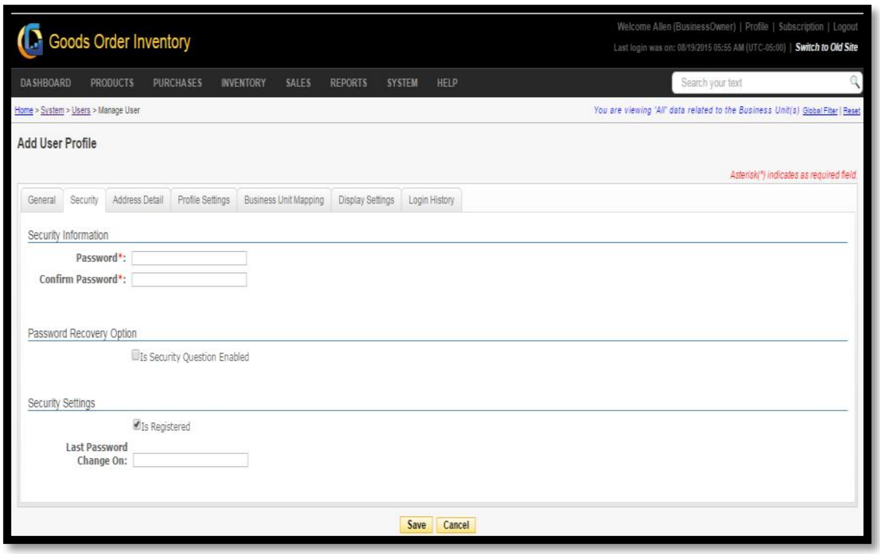


FIGURE 3.5

Security	
Field	Description
Change Password	Click on the button to change the password. On clicking, a new popup will be opened up which will ask you to provide the old password to set the new password.
Is Security Question Enabled	If this box is checked, user has to select a question to save the answer for the same. This will later be used to restore the account.
Security Question	Select a Security question from the list of questions.
Security Answer	Fill the answer with respect to the security question.
Is Registered	Shows you the status of registered user.
Last Password Change On	This field shows the date-time of the last changed password of a user account.

Step 6: After providing the necessary information under Security tab, you need to fill the Address details of the user.

Address Detail Tab:

You can maintain the address details of a sub user. Billing and Shipping address details can be same or different, if both the address is same, then user has to select the given checkbox "Same as billing address". After filling all the details user needs to click on the save button. The snapshot of the page is given below **(Figure 3.6)**.

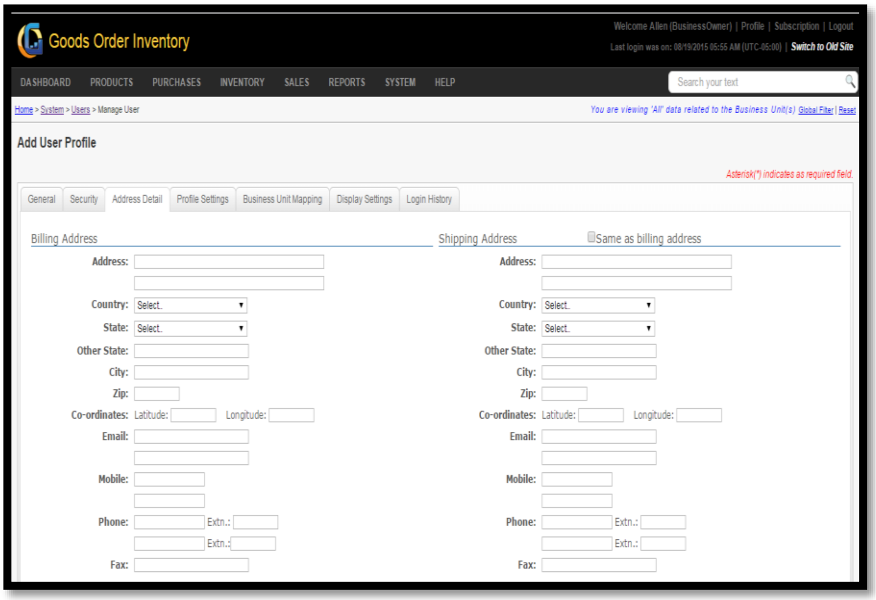


FIGURE 3.6

Billing Address	
Field	Description
Address	Billing Address
Country	Name of the country
State	Select state from the dropdown, state list will be populated according to the country selected.
Other State	If your state is not in the list, then provide it manually.
City	Name of the city
Zip	Zip code
Co-ordinate	Longitude and Latitude
Email	Email address
Mobile	Mobile Number
Phone	Phone Number
Fax	Fax number.
If all the fields of the shipping address are same as billing address, then select the given checkbox to copy the address from shipping to billing address.	

Step 7: After filling the Address details, you have to provide the configuration related to the user profile, as shown in **(Figure 3.7)**.

Profile Settings Tab:

This section provides four different settings to the user. Theme, Time zone, Date and Time format settings for 'Web' and 'Device'. User can change the theme by selecting one of the provided themes. You can also select Time zone and different time format for 'Web' application and 'Device'.

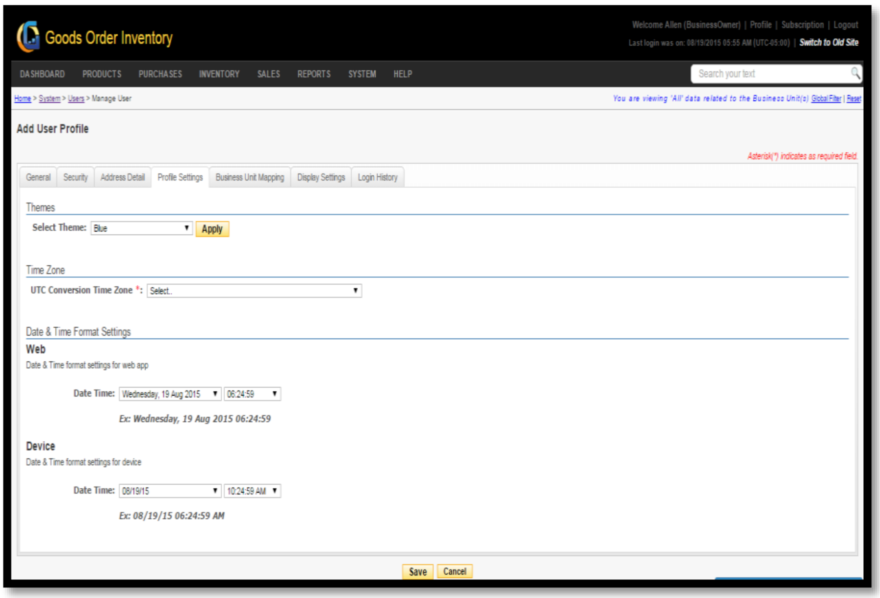


FIGURE 3.7

Profile Settings	
Field	Description
Select Theme	Select one of the themes from the predefined list.
Apply	Click to apply theme.
UTC Conversion Time Zone	Select the Time zone
Date time (Web)	Select a desired format of Date & Time for web application.
Date Time (Device)	Select a desired format of Date & Time for device application.

Step 8: After providing the configuration details under the Profile Settings window, you can also configure the desired display settings for a sub user. You have to click on the Display Setting tab.

Display Settings Tab:

This part of documentation will help you to understand how a GOIS user can define their display, filter, page size and sorting settings for their user's account. For each individual page where you will be navigating into the system, as per your preferences you may set the display settings. GOIS has a display settings section for all its module. These settings can be defined different for device and web interface. **(Figure 3.8)**

The screen is divided into five different categories:

- Transactions
- System Entities
- Reports
- Product, Category Unit
- Popup Screens

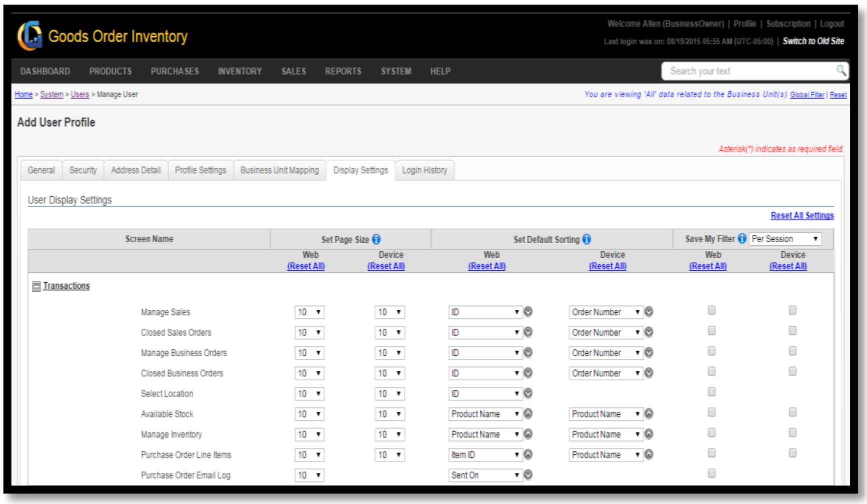


FIGURE 3.8

Transaction	
Field	Description
Save my Filter	User can save the filter by choosing either of the three options given: Per Session, Per Page, Across Sessions
Screen Name	By ticking the given checkbox against each individual screen of GOIS system, a user can set the defined settings to be applied for a 'web' and 'Device'.
Set Page Size	User can set the default page size for each individual page exists into the system to see the record count in one view.
Set Default Sorting	Select the default sorting field for each screen to sort the corresponding page data against chosen field; different for web and device.
Note: Must click on the "Save settings" button to save the changes.	

User Details

To check all the details corresponds to a given user that exists into the GOIS-PRO system, you may click on the name of a user under **System > Users** screen. The user name is a hyperlink and when you will click on it, system will redirect you to another page showing all the activities, transactions, and other details associated with a specific user.

The user details are divided into seven different sections.

- User Info
- Current Subscription
- User Transaction
- Login History
- Audit Activity
- Sales Order
- Purchase Order

User Info

User info section provides the basic information about the user. Snapshot of the section is given in **(Figure 3.12.2)**

FIGURE 3.12.2

The '+' icon highlighted in the given snapshot can be used to get the detailed information about a user. After clicking on this icon the window will expand and will show more details about a given user. Expanded vision of the window has been shown in **(Figure 3.12.3).**

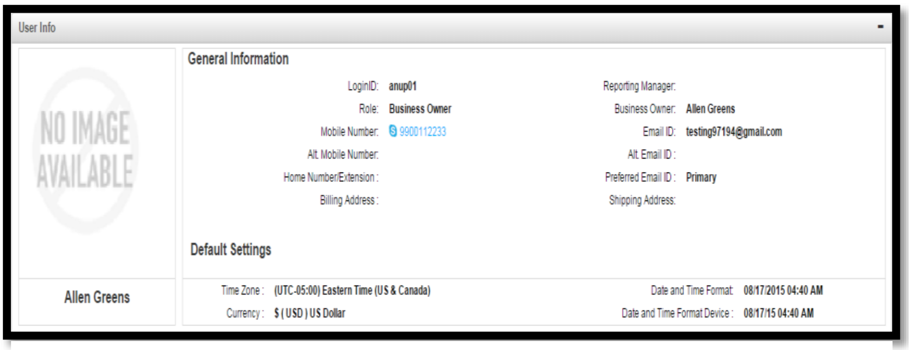
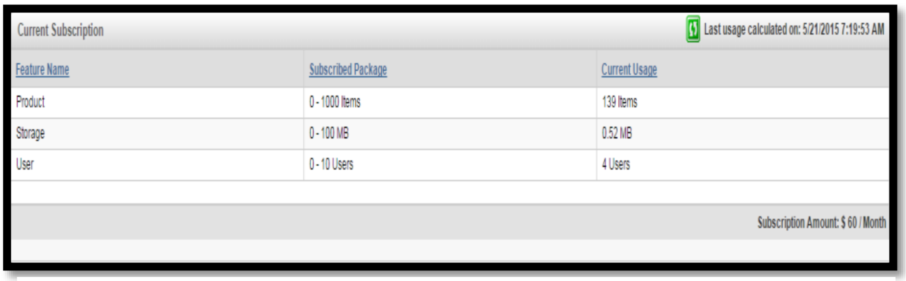


FIGURE 3.12.3

Current Subscription

This section of the window provides the details related to the subscription of the user. A Snapshot of the portion is shown in the **(Figure 3.12.4)**.



Feature Name	Subscribed Package	Current Usage
Product	0 - 1000 Items	139 Items
Storage	0 - 100 MB	0.52 MB
User	0 - 10 Users	4 Users

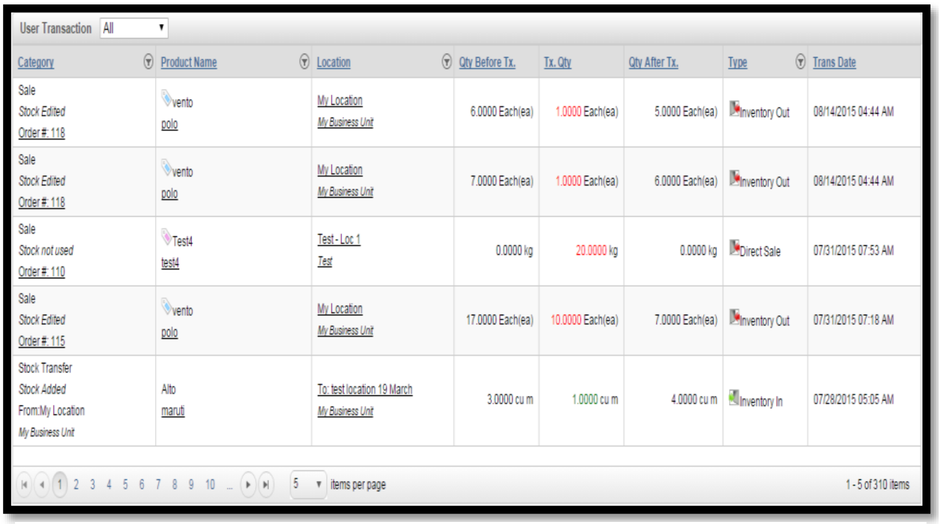
Subscription Amount: $ 60 / Month

FIGURE 3.12.4

(Figure 3.12.4), here users can see the details of the subscribed package (current on-going subscription) and the details of current usage against different criteria like "Product" "Storage" and "User". You can also refresh the usage to check your limits and consumption by clicking on the "Green refresh icon".

User Transaction

You can see all the IN/OUT transactions made by a specific user, using this section of user details page. Snap shot of the section can be seen in **(Figure 3.12.5)**



User Transaction All

Category	Product Name	Location	Qty Before Tx.	Tx. Qty	Qty After Tx.	Type	Trans Date
Sale *Stock Edited* Order #: 118	vento polo	My Location *My Business Unit*	6.0000 Each(ea)	1.0000 Each(ea)	5.0000 Each(ea)	Inventory Out	08/14/2015 04:44 AM
Sale *Stock Edited* Order #: 118	vento polo	My Location *My Business Unit*	7.0000 Each(ea)	1.0000 Each(ea)	6.0000 Each(ea)	Inventory Out	08/14/2015 04:44 AM
Sale *Stock not used* Order #: 110	Test4 test4	Test - Loc 1 *Test*	0.0000 kg	20.0000 kg	0.0000 kg	Direct Sale	07/31/2015 07:53 AM
Sale *Stock Edited* Order #: 115	vento polo	My Location *My Business Unit*	17.0000 Each(ea)	10.0000 Each(ea)	7.0000 Each(ea)	Inventory Out	07/31/2015 07:18 AM
Stock Transfer *Stock Added* From:My Location *My Business Unit*	Alto maruti	To: test location 19 March *My Business Unit*	3.0000 cu m	1.0000 cu m	4.0000 cu m	Inventory In	07/28/2015 05:05 AM

1 2 3 4 5 6 7 8 9 10 ... 5 items per page 1 - 5 of 310 items

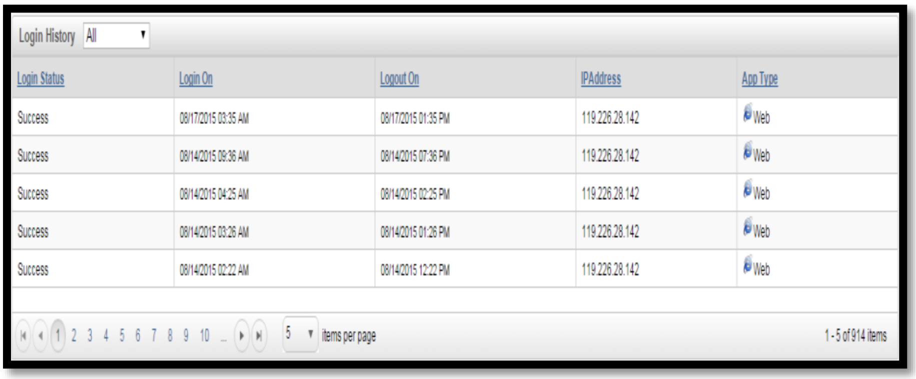
FIGURE 3.12.5

The details of each and every transaction done by the user can be seen through this section. Details like category of the transaction along with the product associated with the transaction and other important details.

Note: Data can be filtered or sorted by using the given filters.

Login History

You can view the login details of the specific user by going through this section. Snapshot of the section is provided in **(Figure 3.12.6).**



Login History All

Login Status	Login On	Logout On	IPAddress	App Type
Success	08/17/2015 03:35 AM	08/17/2015 01:35 PM	119.226.28.142	Web
Success	08/14/2015 09:36 AM	08/14/2015 07:36 PM	119.226.28.142	Web
Success	08/14/2015 04:25 AM	08/14/2015 02:25 PM	119.226.28.142	Web
Success	08/14/2015 03:26 AM	08/14/2015 01:26 PM	119.226.28.142	Web
Success	08/14/2015 02:22 AM	08/14/2015 12:22 PM	119.226.28.142	Web

1 2 3 4 5 6 7 8 9 10 ... 5 items per page 1 - 5 of 914 items

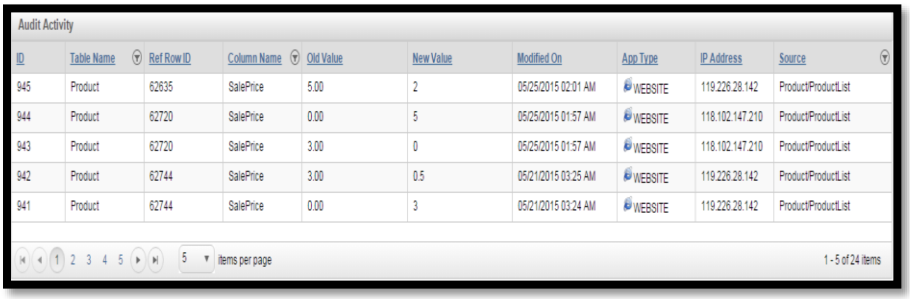
FIGURE 3.12.6

You can filter the result on two different parameters, “Success” and “Failed” login. The filter can be found on the top of the section.

Login History	
Field	Description
Login Status	Status of the login (“Success” or “Failed”)
Login On	Date & time of Login.
Logout On	Date & time of Logout.
IP Address	IP Address through which the user got logged in.
App Type	Type of application (Android/iOS/Web).

Audit Activity

This section allows you to view all the audit activity made by a specific user against any product. Snapshot of the section is given in **(Figure 3.12.7)**.


Audit Activity

ID	Table Name	Ref Row ID	Column Name	Old Value	New Value	Modified On	App Type	IP Address	Source
945	Product	62635	SalePrice	5.00	2	05/25/2015 02:01 AM	WEBSITE	119.226.28.142	Product/ProductList
944	Product	62720	SalePrice	0.00	5	05/25/2015 01:57 AM	WEBSITE	118.102.147.210	Product/ProductList
943	Product	62720	SalePrice	3.00	0	05/25/2015 01:57 AM	WEBSITE	118.102.147.210	Product/ProductList
942	Product	62744	SalePrice	3.00	0.5	05/21/2015 03:25 AM	WEBSITE	119.226.28.142	Product/ProductList
941	Product	62744	SalePrice	0.00	3	05/21/2015 03:24 AM	WEBSITE	119.226.28.142	Product/ProductList

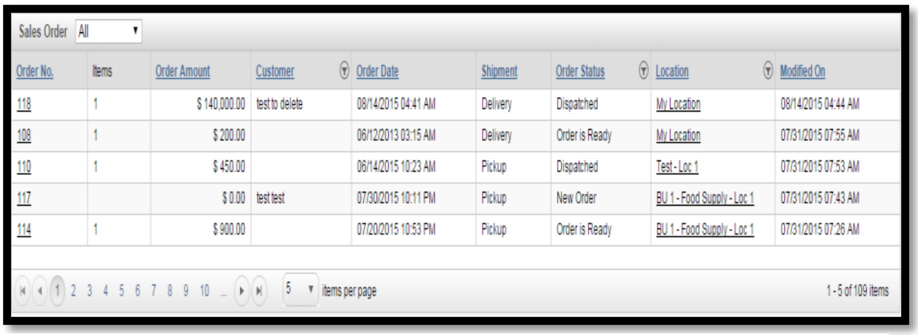
1 2 3 4 5 | 5 items per page | 1 - 5 of 24 items

FIGURE 3.12.7

Audit Activity	
Field	Description
ID	Unique system generated audit ID.
Table Name	Name of the table effected.
Ref Row ID	ID of the row effected.
Column Name	Name of the column effected.
Old Value	Value before doing the activity.
New Value	Value after doing the activity.
Modified on	Date & Time of modification in a record.
App type	Application from which the activity has been done.
IP Address	IP Address from which the activity has been done.
Source	Source module.

Sales Order

To see all the sales order punched and dispatched by a specific user, you have to navigate to this portion of the user details page. Different filters are also available to filter and sort out the data as desired. Snapshot of the page is shown in **(Figure 3.12.8)**.


Sales Order All

Order No.	Items	Order Amount	Customer	Order Date	Shipment	Order Status	Location	Modified On
118	1	$ 140,000.00	test to delete	08/14/2015 04:41 AM	Delivery	Dispatched	My Location	08/14/2015 04:44 AM
108	1	$ 200.00		06/12/2013 03:15 AM	Delivery	Order is Ready	My Location	07/31/2015 07:55 AM
110	1	$ 450.00		06/14/2015 10:23 AM	Pickup	Dispatched	Test - Loc 1	07/31/2015 07:53 AM
117		$ 0.00	test test	07/30/2015 10:11 PM	Pickup	New Order	BU 1 - Food Supply - Loc 1	07/31/2015 07:43 AM
114	1	$ 900.00		07/20/2015 10:53 PM	Pickup	Order is Ready	BU 1 - Food Supply - Loc 1	07/31/2015 07:26 AM

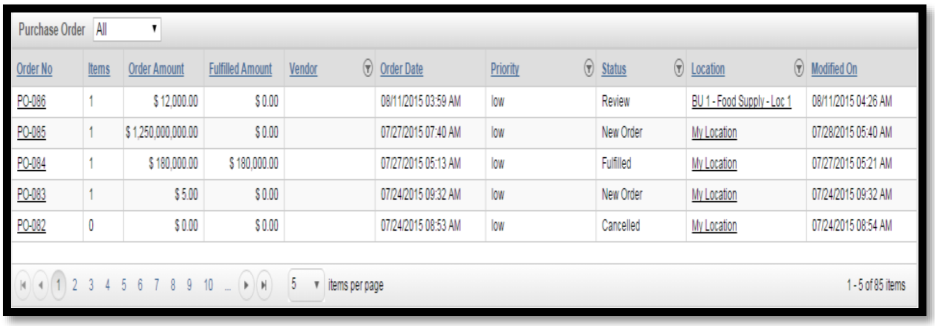
1 2 3 4 5 6 7 8 9 10 ... 5 items per page 1 - 5 of 109 items

FIGURE 3.12.9

Sales Order	
Field	**Description**
Order No	Sales Order Number
Items	No. of items associated with a given sales order.
Order Amount	Total Amount of an order.
Customer	Name of the customer to which the sales have been made.
Order Date	The Date on which the order is created.
Shipment	Type of order shipment.
Order Status	Current status of a given sales order.
Location	Location under which the order is created.
Modified On	Date of modification.

Purchase Order

To see the list of purchase orders that has been raised/fulfilled by a specific user, you have to navigate to the "Purchase Order" section of the user details page. You will get the details associated with each purchase order also by going through this section of the page. A Snapshot of the page is shown in the below given snapshot in **(Figure 3.12.10)**.


Purchase Order All

Order No	Items	Order Amount	Fulfilled Amount	Vendor	Order Date	Priority	Status	Location	Modified On
PO-086	1	$ 12,000.00	$ 0.00		08/11/2015 03:59 AM	low	Review	BU 1 - Food Supply - Loc 1	08/11/2015 04:26 AM
PO-085	1	$ 1,250,000,000.00	$ 0.00		07/27/2015 07:40 AM	low	New Order	My Location	07/28/2015 05:40 AM
PO-084	1	$ 180,000.00	$ 180,000.00		07/27/2015 05:13 AM	low	Fulfilled	My Location	07/27/2015 05:21 AM
PO-083	1	$ 5.00	$ 0.00		07/24/2015 09:32 AM	low	New Order	My Location	07/24/2015 09:32 AM
PO-082	0	$ 0.00	$ 0.00		07/24/2015 08:53 AM	low	Cancelled	My Location	07/24/2015 08:54 AM

1 2 3 4 5 6 7 8 9 10 ... 5 items per page 1 - 5 of 85 items

FIGURE 3.12.10

Purchase Order	
Field	Description
Order No	Unique purchase order number.
Items	Number of items associated with a given order.
Order Amount	Total order amount
Fulfilled Amount	Total fulfilled amount
Vendor	Name of the vendor for which the order is created.
Order Date	The Date on which the order is created.
Priority	Priority of an order.
Status	Current status of an order.
Location	Location under which the purchase order has been raised.
Modified On	Date & Time of modification.

Part 4: Reports

This section of document gives you the idea about the reports that GOIS Pro provides to all the business owners to analyse their business performance and activities. You can go through this section to know about the types of reports that GOIS Pro provides for better analysis of your business and to help business owners to take the effective business decision. This section will broadly cover the reports given below.

- **Chapter 5: "All Transaction",** describes how to check the list of all the In/OUT transactions that has been held across a business owner account by different users into the system.
- **Chapter 6: "Profit & Loss Report",** this report will help business owners to get an idea about the Profit and Loss in a business for a given duration. These profit and loss analyses can be done on the basis of two different views of Profit and Loss report.
    - Product specific
    - Sales specific

- **Chapter 7: "Low Stock Report",** this report helps business owner to have a look on all those items which are having the low stock quantities into the inventory/warehouse, so that the items can be reordered to maintain the product sufficiency into the warehouse before the customer comes in to your shop.

- **Chapter 8: "Sales Report",** This report allows business owners to use an easy to use and interactive interface to generate a periodic sales report and analyse the graphs to get a quick overview against overall business performance on the basis of total sales made by each individual user or sales made for top selling products in a given duration.

- **Chapter 9: "Stock Adjustment Log",** any stock adjustment made into the system to deduct or to increase the inventory quantities against the existing stock entries can be seen under the stock adjustment logs section. Stock adjustment logs also give you the flexibility to track the activities made into the inventory by different users as an eye on your business from anywhere.

- **Chapter 10: "Import & Transfer Log",** all the stock transfers and stock imports across multiple locations or multiple business units by different users within the same organization can be seen under the import and transfer log section.

- **Chapter 11: "View Audit Activity Log**", For auditing purpose, a business owner can check the audit activity logs against the user activities for an organizational data (especially useful in a multiuser environment), so that if any user will make any amendment on your business product data, it can be traced during the audit.

Chapter 5: All Transaction

This part of documentation contains the explanation about “All Transaction” report that GOIS Pro Provides to their user. To see the All Transaction report users can navigate to the “All Transaction” section, this option can be found under the “Report” dropdown sub menu. The navigation of the menu is shown below.

To View All Transaction Report: (Home>>Reports>>ALL Transactions)

1. Move the mouse pointer to the Report section on the menu bar, a drop down sub menu will be displayed, click on “All Transactions”.
2. The user will be redirected to another page containing the list of all transactions. A snapshot of the page is given in figure 4.5.1.

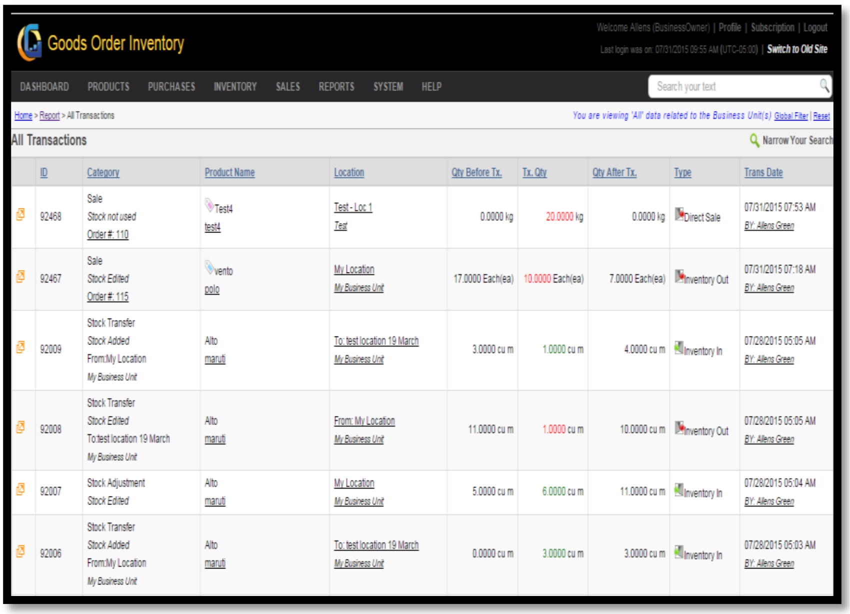


FIGURE 4.5.1

Field	Description
	Click on this icon to see the preview providing the details about the specific transaction.
ID	ID of the Transaction
Category	Which category the specific transaction belongs to.
Product Name	Name of the Product.
Location	Location of transaction
Qty Before Tx.	Quantity before Transaction
Tx. Qty	Transaction Quantity
Qty After Tx.	Quantity after Transaction

Type	GOIS Pro provides three types of transaction “Direct Sale” “Inventory In” “Inventory Out”
Trans Date	Date of Transaction.
	Sales without using inventory
	Sales using Inventory.

Chapter 6: Profit and Loss Report

This part of the document provides the information about Profit and Loss Report that GOIS Pro provides to their users. GOIS Pro provides two different views of Profit and Loss Report.

- Product specific
- Sales specific

To view Profit and Loss Report, user has to navigate to the "Profit and Loss Report" section; this option can be found under the "Reports" drop down menu. The navigation of the menu is shown below.

To view Profit and Loss Report: (Home>>Reports>>Profit and Loss Report)

1. Move the mouse pointer to the "Reports" section on the menu bar, a drop down menu will be displayed.
2. Move the pointer on the 'Profit and Loss Report', in the drop down you will get another sub-menu.
3. Click on any two options according to the need
   i. Product Specific
   ii. Sales Specific

Note: Product specific report gives the details about profit and loss for each specific product sold in a given duration of time. Sales specific report provides the profit and loss details against each specific sale you have made in a given duration of time.

When you will click on the "Product specific" section, you will be redirected to another window; a snapshot of the window is given in figure: 4.6.1.

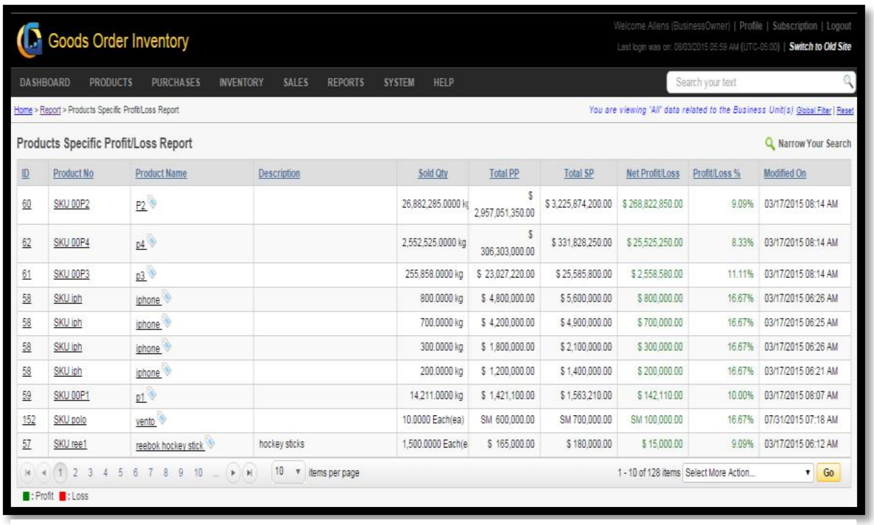


FIGURE 4.6.1

Field	Description
ID	System generated ID of a product
Product No.	Product number/SKU#/Barcode

Product Name	Name of the product
Description	Description about the product
Sold Qty	Quantity sold
Total PP	Total purchase price
Total SP	Total selling price
Net Profit/Loss	Net Profit or Loss
Profit/Loss %	Percentage of Profit or Loss
Modified on	Date of modification
: Profit : Loss	Green signifies profit and Red signifies loss. This is implemented on “Net Profit/Loss” and “Profit/Loss %” field.

When you will click on the Sales specific section, you will be redirected to another window; a snapshot of the window is given in figure: 4.6.2.

Sales Specific Profit/Loss Report Tab:

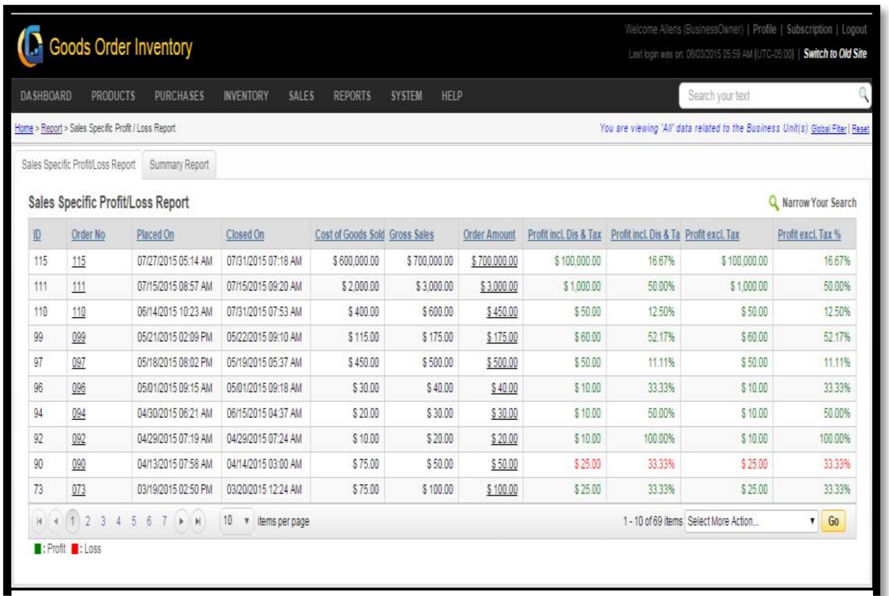


FIGURE 4.6.2

Field	Description
ID	System generate sales order ID
Order No	Unique sales order number
Placed On	Order placed on (Date/Time)
Closed On	Order closed on (Date/Time)
Cost of Goods Sold	Total cost of goods sold
Gross sales	Gross sales

Order Amount	Total order amount
Profit Incl Dis & Tax	Profit including discount and taxes
Profit Incl Dis & Tax (%)	Profit including discount and taxes (%)
Profit Excl Tax	Profit excluding Taxes
Profit excl. Tax (%)	Profit excluding Tax (%)

Note: To distinguish between Profit and Loss, Green and Red colours has been used respectively.

Summary Report Tab:

This tab provides a combined view of summarized profit and loss report. The snapshot of the page and field description are given in figure: 4.6.3

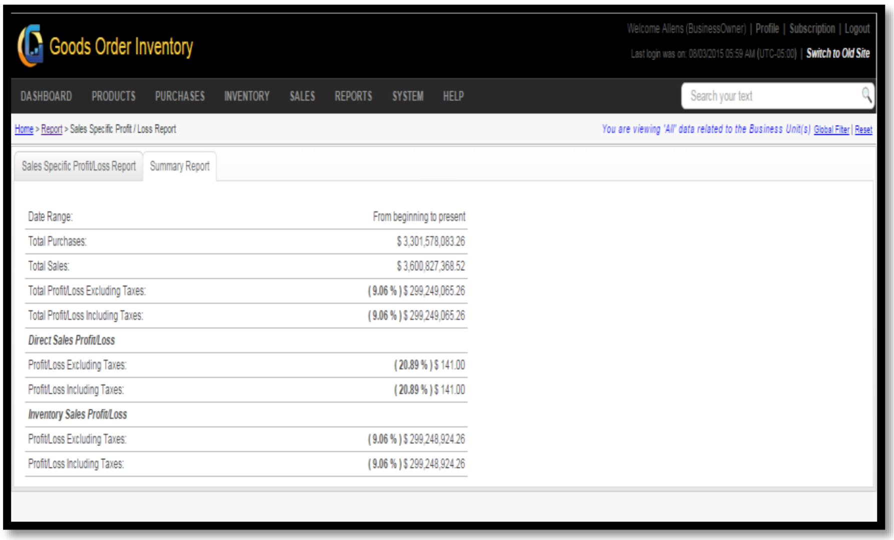


FIGURE 4.6.3

Field	Description
Date Range	Starting and ending date for which the report has to be displayed.
Total Purchase	Total Purchase made in a given duration.
Total Sales	Total Sales made in a given duration.
Total Profit/Loss Excluding Taxes	Total Profit and Loss, excluding taxes.
Total Profit/Loss	Total Profit or Loss, including taxes.

Including Taxes	
Profit/Loss Excluding Taxes:	Total Profit and loss, excluding taxes (direct sale)
Profit/Loss Including Taxes:	Profit or Loss, including taxes (direct sale).
Profit/Loss Excluding Taxes:	Profit or Loss, excluding taxes (inventory sale).
Profit/Loss Including Taxes:	Profit or Loss, including taxes (inventory sale).

Chapter 7: Low Stock Report

This part of the documentation explains the Low stock Report that GOIS Pro provides to the users. Low stock is the lower limit for product quantity respective of its unit of measurement. The lower limit of the product needs to be defined by the user itself. And when the stock comes under this user defined limit, GOIS Pro shows notification to the user. So that you can easily maintain the stock by adding more quantity into the inventory and to maintain the product sufficiency.

To view Low Stock Report, user has to navigate to the "Low Stock Report" section; this option can be found under the "Reports" drop down menu. The navigation of the menu is shown below.

To view Low Stock Report: (Home>>Reports>>Low Stock Report)

1. Move the mouse pointer to the "Reports" section on the menu bar, a drop down menu will be displayed.
2. Click on the 'Low Stock Report', from the dropdown.
3. You will be redirected to another window, Snapshot of the window is shown in figure: 4.7.1

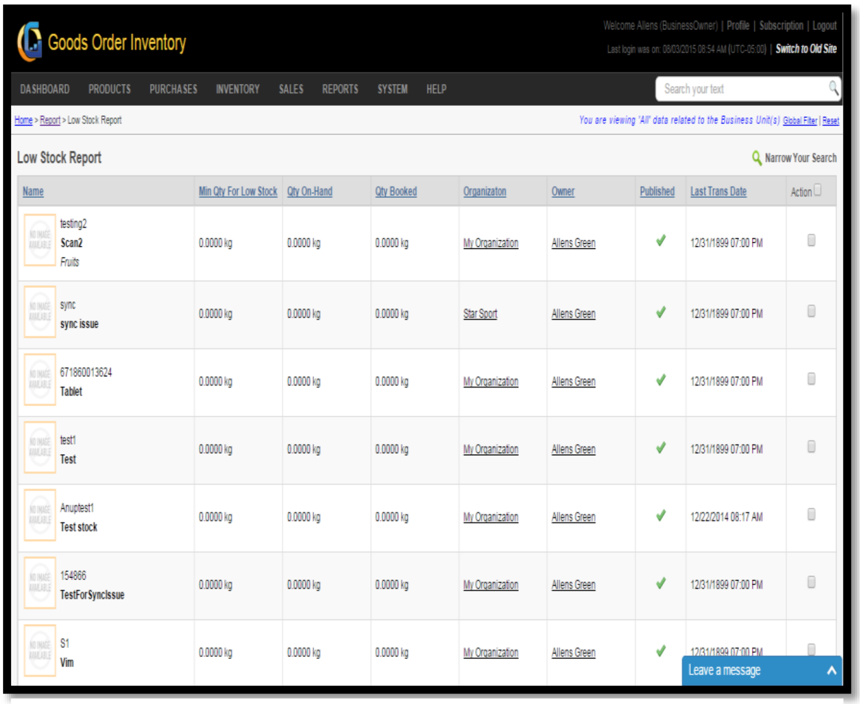


FIGURE 4.7.1

Field	Description
Name	Name of the Product
Min Qty for Low Stock	Min Quantity for low stock – user defined
Qty On-Hand	Available quantity
Qty Booked	Quantity Booked
Organization	Name of the organization
Owner	Name of the business owner
Published	Green-True/Grey-False
Last Trans Date	Last transaction date.
Action	Action check box to perform more activity against a specific entry.

Chapter 8: Sales Report

This part of the documentation explains the generation of sales report by GOIS Pro. GOIS Pro provides easy to use and interactive interface, to generate sales report according to the ease of user. Its graphical representation helps the user to understand the report easily in no time.

To view Sales Report, the user has to navigate to the “Sales Report” section; this option can be found under the “Reports” drop down menu. The navigation of the menu is shown below.

To view Sales Report: (Home>>Reports>>Sales Report)

1. Move the mouse pointer to the “Reports” section on the menu bar, a drop down menu will be displayed.
2. Click on the ‘Sales Report’, from the dropdown.
3. You will be redirected to another window, Snapshot of the window is shown in figure: 4.8.1

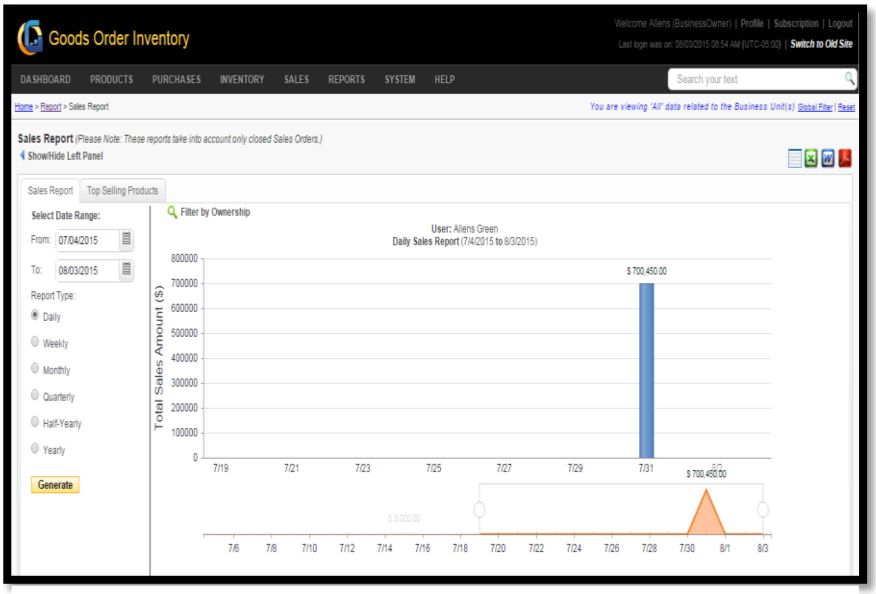


FIGURE 4.8.1

<u>Sales Report Tab:</u>

In the given snapshot, you can easily see that, half of the screen is dedicated to the bar graph, to display the report in a graphical manner. Users are provided with the option to generate the graph according to their convenience. The left vertical panel is dedicated to generate the graph according to the timeframe provided by the user.
User can also filter the report according to the ownership.

Field	Description
Filter By ownership	Click to set values to filter according to ownership
Organization	Name of the organization
Business Unit	Name of the Business Unit
Reset	Reset all the fields
Show Data at/for	Generate reports for one of the specification given
Select Date Range (To)	Select end date for a report
Select Date Range (From)	Set starting date for a report
Daily	Select to generate daily report
Weekly	Select to generate report for a week
Monthly	Select to generate report for a month
Quarterly	Select to generate report for 3-months
Half-Yearly	Select to generate report for 6-months
Yearly	Select to generate reports for a whole year
Generate	After selection the time frame, click on this button to generate the report
	Click on the icon to show tabular report
	Click on this icon to generate excel document for the report
	Click on this icon to generate a word document for the report
	Click on this icon to generate the pdf of the report

<u>Top Selling Products Tab:</u>

You can also generate report for the top selling products. For this you need to click on the Top selling product tab in the “Sales Report Window” and then fill the necessary information under the given fields as per the individual’s business requirement. The snap shot of the window is shown in figure: 4.8.2

To view “Top Selling Product” report: (Home>>Reports>>Sales Report>>Top Selling Product Report)

To view “Top Selling Products” report, user has to navigate to the “Sales Report” section, this option can be found in the “Reports” drop down menu and then within the “Top Selling Product Tab”.

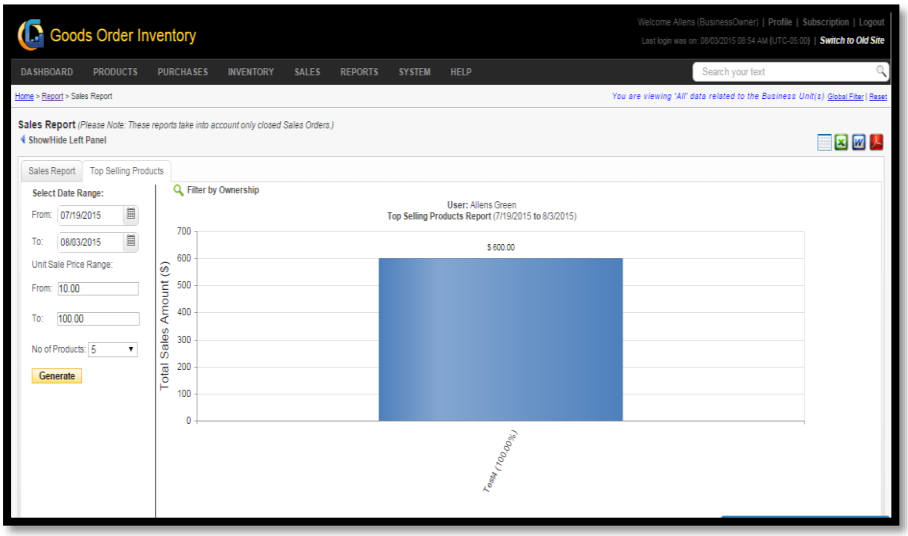


FIGURE 4.8.2

Field	Description
From (Date)	Set starting date to generate a report
To (Date)	Select ending date to generate a report
From (Sale Price)	Starting range for sales Price (filter)
To (Sale Price)	Ending Range of sales Price (filter)
No of Products	Number/count of product that the user wants to see in a report
Generate	Click to generate Report
Filter By Ownership	Select the field, to filter according to the ownership.

Chapter 9: Stock Adjustment Log

This part of the document will explain how to view the stock adjustment log into the GOIS Pro system. Using this section, you are allowed to check all the adjustments you have made on your different stocks with different reasons for the adjustment. Red colour adjusted quantity shows the negative deduction from the stock, whereas the green colour adjusted quantity shows the positive/added item into a given stock.

You can use narrow your search option to filter out the log as per your requirement.

To view “Stock Adjustment Log”, user has to navigate to the “Stock adjustment Log” section; this option can be found under the “Reports” drop down menu. The navigation of the menu is shown below.

To view Stock Adjustment Log:
(Home>>Reports>>Stock Adjustment Log**)**

1. Move the mouse pointer to the “Reports” section on the menu bar, a drop down menu will be displayed.
2. Click on the ‘Stock Adjustment Log’, in the dropdown.
3. You will be redirected to another window, Snapshot is shown in figure: 4.9.1

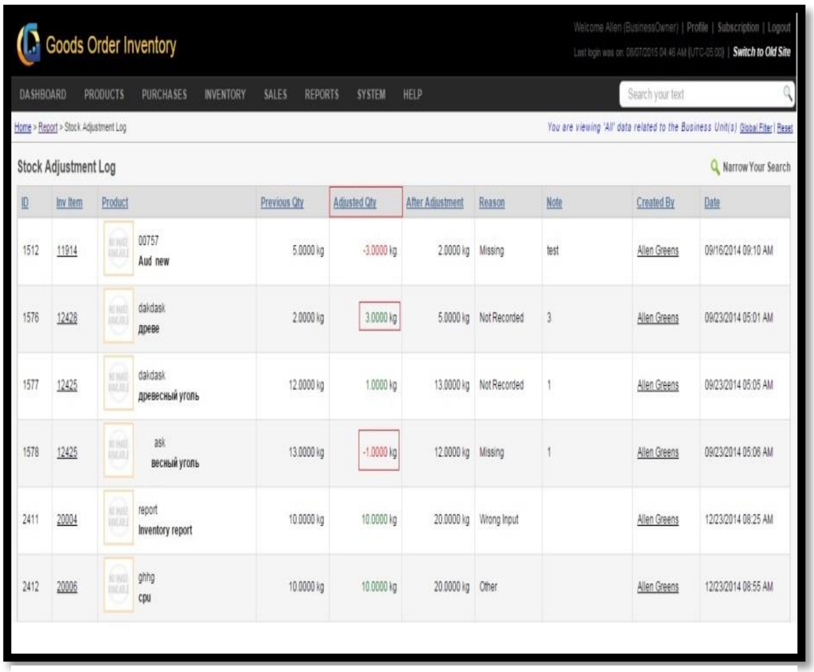


FIGURE 4.9.1

Field	Description
ID	System generated ID of a transaction
Inv Item	Inventory item ID
Product	Name and number of a Product
Previous Qty	Quantity before adjustment
Adjusted Qty	Quantity adjusted
After Adjustment	Quantity remain after adjustment
Reason	Reason for adjustment
Note	Special Note
Created By	Name of the user who made the adjustment
Date	Date of adjustment

Chapter 10: Import and Transfer Log

This part of the documentation explains how to view the Import and Transfer log in GOIS Pro.

To view “Import and Transfer Log”, the user has to navigate to the “Import and Transfer Log” section, this option can be found under the “Reports” drop down menu. The navigation of the menu is shown below.

To view Import and Transfer Log: (Home>>Reports>>Import and Transfer Log**)**

1. Move the mouse pointer to the “Reports” section on the menu bar, a drop down menu will be displayed.
2. Click on the ‘Import Transfer log’; from the dropdown.
3. You will be redirected to another window, Snapshot of the window is shown in figure: 4.10.1

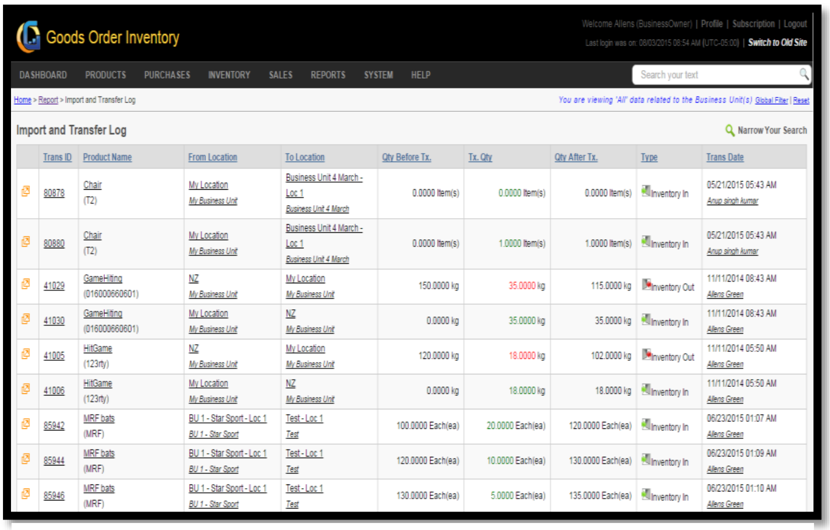


FIGURE 4.10.1

Field	Description
	Click on this icon to see detailed preview against a transaction.
Trans ID	Unique transaction ID
Product Name	Name of the Product and SKU#
From Location	The location from which the transaction is initiated
To Location	The location to which the transaction ended
Qty Before Tx.	Quantity of the product before transaction
Tx. Qty	Transaction quantity

Qty After Tx.	Quantity after transaction
Type	Type of Transaction (IN/OUT)
Trans Date	The date-time on which transaction held

Chapter 11: View Audit Activity Log

GOIS provides a log for all the product related changes that has been made into the system. To view details about the changes, user needs to navigate to the "View Audit Activity Log".

To View Audit Activity Log: (Home>>System>>View Audit Activity Log**)**

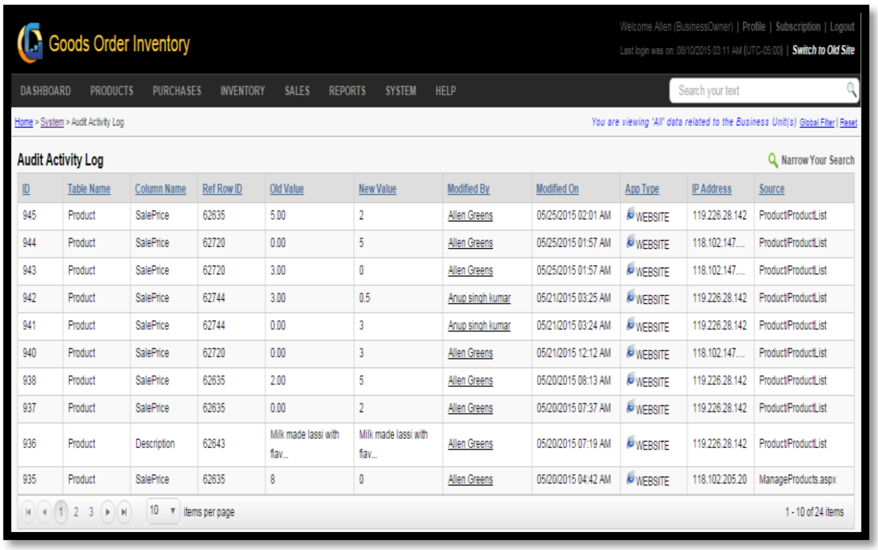


FIGURE 4.11.1

Audit Activity Log	
Field	**Description**
ID	System generated unique audit ID.
Table Name	Name of the table whose fields have been edited.
Column Name	Name of the column whose fields have been edited.
Ref Row Id	Reference row ID of the table
Old Value	Value before the change has been applied
New Value	The value after the change has been applied
Modified By	Name the person who modified the fields
Modified On	Date of modification.
App Type	Type of application
IP Address	IP address of the system/device
Source	Source page

Part 5: Settings

Settings section gives you detailed information related to the system configuration that GOIS Pro Provides to its user to setup their account as per individual's business needs. This part will broadly cover the chapter mentioned below.

Chapter 11: "User Application Settings", allow you to define desired business settings to maintain the standards which will be used throughout the system across different sections like purchase, sales, inventory, etc. After going through this section, you will get to know about purchase and sales order formatting, rules for sales, inventory and stock adjustment etc. This part will broadly cover the points mentioned below.

- Purchase Order No. Format
- Sales Order No. Format
- Sales Option
- Stock Adjustment Rule
- Other Settings
- Mapped Device

Chapter 12: "Edit User Profile", this part of the documentation will help you to understand about how to edit a user profile into the GOIS Pro system. This chapter will broadly cover the points mentioned below.

- General
- Security
- Address Detail
- Profile Settings
- Application Settings
- Display Settings
- Login History

Chapter 12: User Application Settings

This part of the documentation contains description about the user application settings. After going through this section, you will be able to understand about the functionalities that GOIS Pro provides to its users related to purchase and sale order formatting, rules for sales and inventory stock adjustment, etc. This part will broadly cover the points mentioned below.

- Purchase Order No. Format
- Sales Order No. Format
- Sales Option
- Stock Adjustment Rule
- Other Settings
- Mapped Device

For "User Application Settings": (Home>>System>>Owner Settings**)**

1. Move the mouse pointer to the "System" section on the Menu bar, a drop down menu will be displayed, click on the "Owner Settings".
2. The user will be redirected to another page containing different tabs for settings. A snapshot of the page is given in figure: 5.12.1

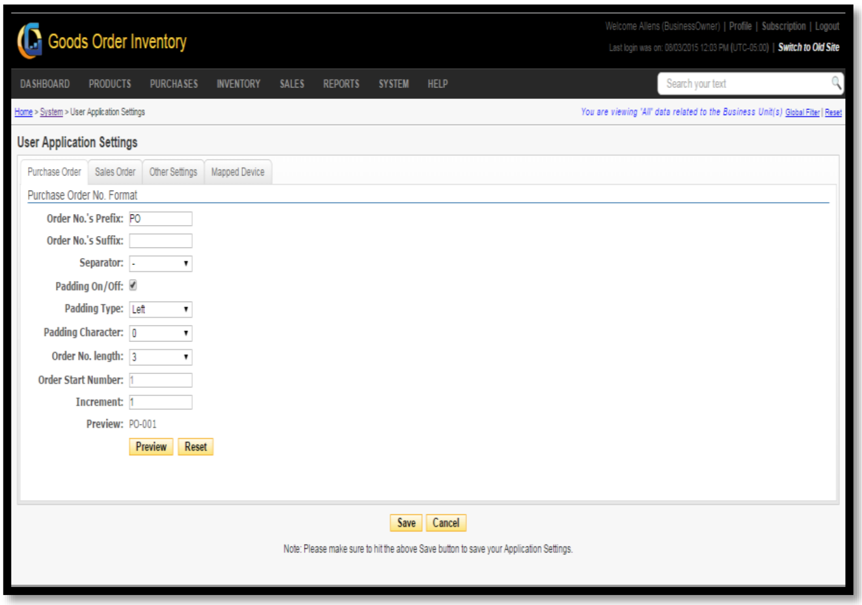


FIGURE 5.12.1

Purchase Order Number Format

GOIS Pro provides user, an independence to format their Order Numbers by providing the Prefix, Suffix and other details as per the requirement. This can be done by providing the required field information, which can be seen in figure: 5.12.1

Field	Description
Order No's Prefix	User defined Prefix in the order number string
Order No's Suffix	User defined Suffix in the order number string
Separator	User defined separator between different, sections of the order number string
Padding on/off	Select the check box to switch-on the padding characters into the order number string
Padding Type	Type of the padding
Padding Character	Select a padding character from the given list
Order No. length	Maximum length of the order number string
Order Start Number	The sequence number from where the order number starts with.
Increment	Increment in the order number with every new purchase order
Preview	Preview of the order number as per the provided settings
Reset	Reset all the field
Example	PO/001/DC

After providing all the necessary information to define a purchase order number format, the output generated on clicking to the Preview button will be displayed as shown in figure: 5.12.2

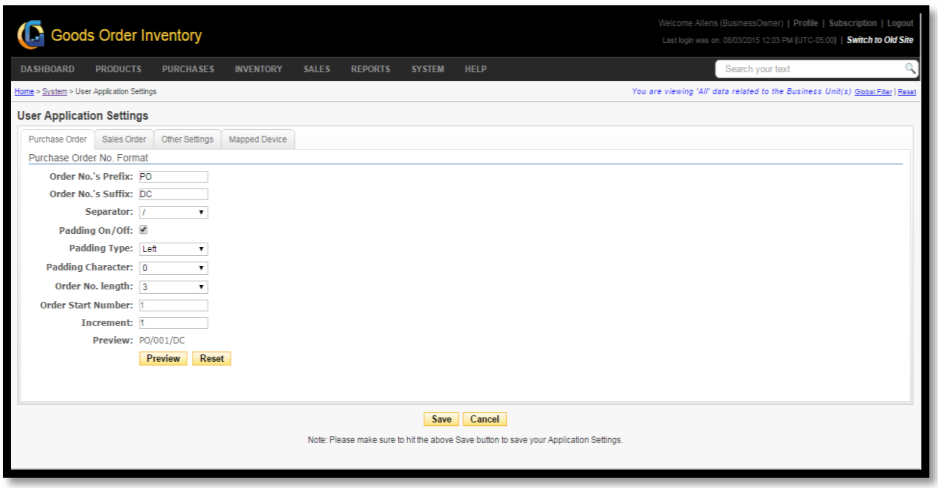


FIGURE 5.12.2

Sales Order Number Format

GOIS Pro provides user, an independence to format their Sales Order Number by providing the Prefix, Suffix and other details as per the business needs. The snapshot of the window is shown in figure: 5.12.3

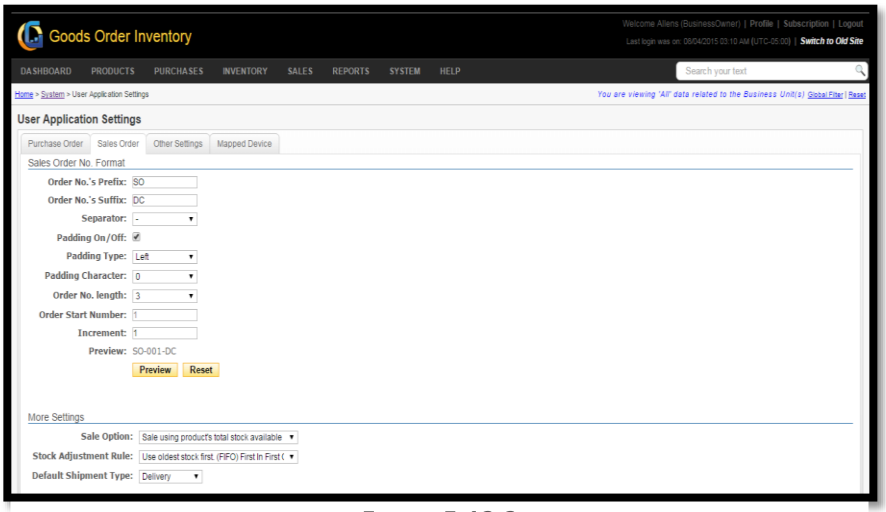


FIGURE 5.12.3

Field	Description
Order No's Prefix	User defined prefix into a sales order number string
Order No's Suffix	User defined suffix into a sales order number string
Separator	User defined separator between different, sections of the sales order number string
Padding on/off	Select the check box to switch-on the padding to separate the string characters using padding character
Padding Type	Type of the padding
Padding Character	Select a padding character from the given list
Order No. length	Maximum length of the order number string
Order Start Number	Sequence number from where the order number starts with
Increment	Increment value into the order number against each new sale order
Preview	To check the preview of the defined order number string
Reset	Reset all the fields
Example	SO/001/DC

After providing all the necessary information to define a sales order number format, the output generated on clicking to the Preview button will be displayed as shown in figure: 5.12.3

Sales Option

There are three different sales option that GOIS provides to its user to sell Products and update the system according to their convenience.

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

2. Sale using Product's individual stock entries available at a location.
    - Each sale will be made from the individual stock entry against a product available at a given location. At the time of sale, you need to choose the specific entry with which you want to make a sale

3. Sale using the product list without using the inventory.
    - It means you can make sale directly from the product list without using the inventory or concerning about the stock availability in your warehouse. Since the sale will be made without using the inventory, there is no any affect in your inventory stock against such sale.

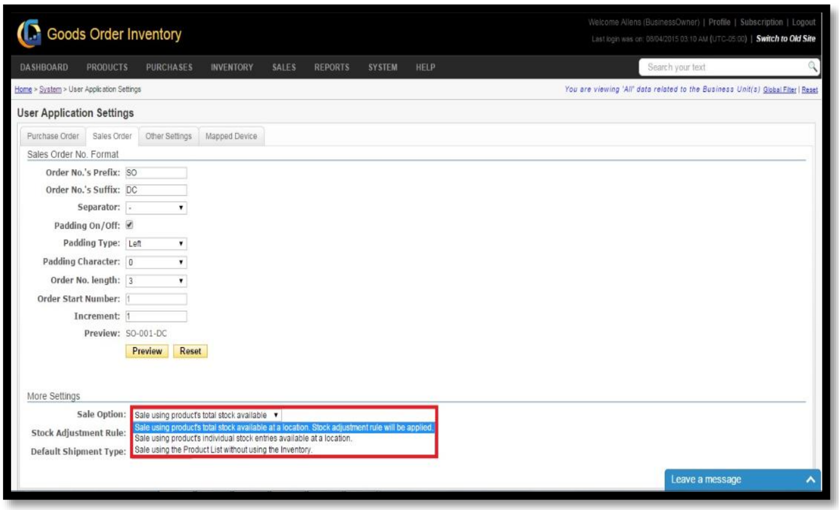


FIGURE 5.12.4

Stock Adjustment Rule

By applying the stock adjustment rule, user can set a rule to use oldest stock first or the newest stock first.

There are two ways of Stock Adjustment in GOIS Pro:

- **LIFO**
- **FIFO**

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

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

Note: The snapshot of the page is given in figure: 5.12.5 and the dropdown of the Stock adjustment rule with both the options is marked in the below given snapshot.

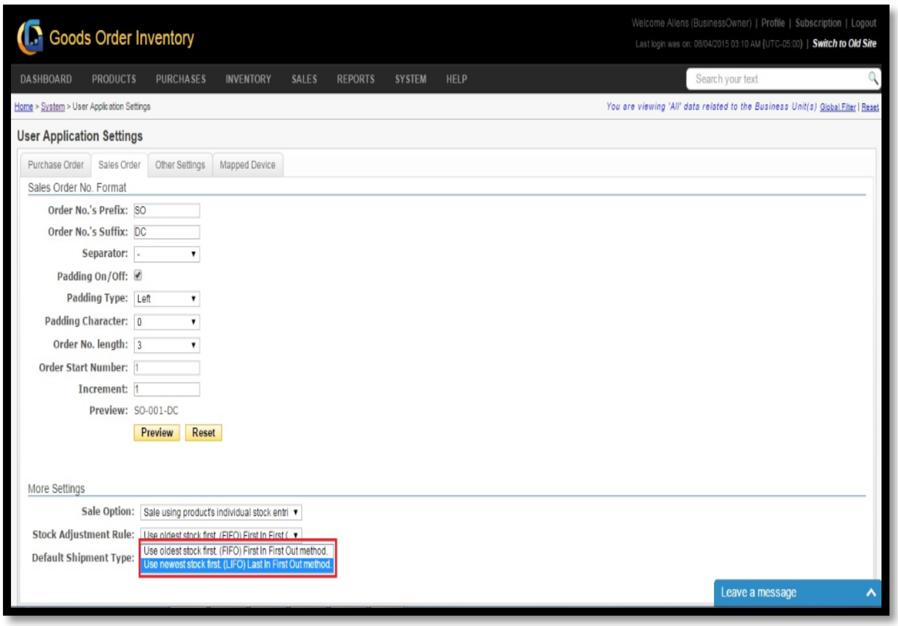


FIGURE 5.12.5

Other Settings

"Other settings" in the "User Application Settings" sections provides "Default Currency & Units Settings" and "Price & Quantity Decimal Display Settings". The snapshot of the window is provided in figure: 5.12.6

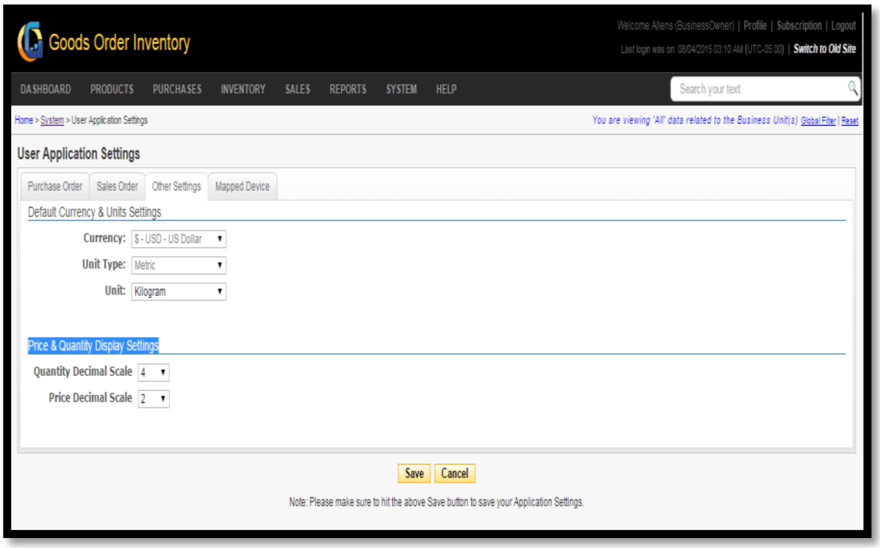


FIGURE 5.12.6

User Application Settings	
Field	Description
Currency	Select the default currency
Unit Type	Select the default unit type
Unit	Select the default measurement unit
Quantity Decimal Scale	Decimal value to be shown against the quantity
Price Decimal Scale	Decimal value to be shown against the price
Save	Click to save the changes
Cancel	Click to cancel the changes

Mapped Devices

The Mapped device page shows the list of devices from which the GOIS Pro has been accessed. The snapshot of the page is shown in figure: 5.12.7

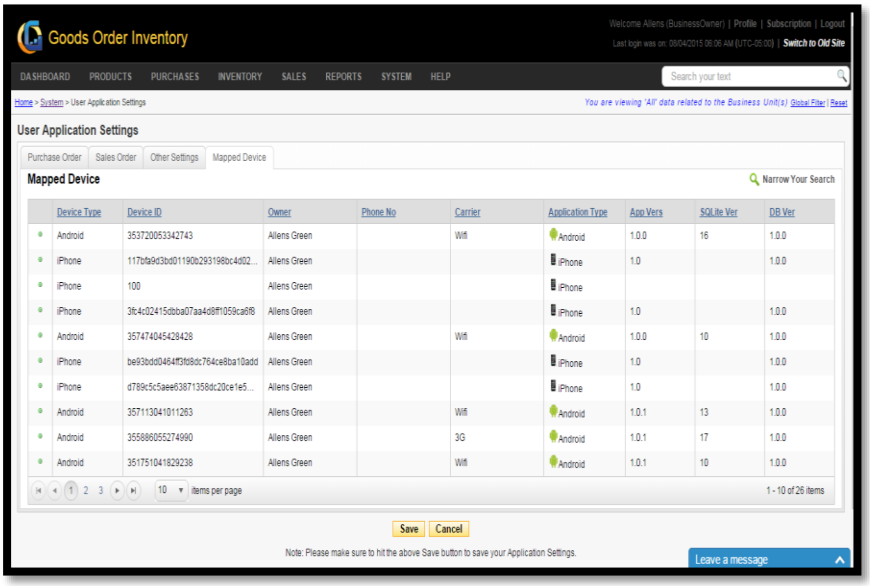


FIGURE 5.12.7

Mapped Devices	
Field	Description
Device Type	Type of the device from which the GOIS Pro has been accessed.
Device ID	Unique Device ID
Owner	Name of the Business Owner
Phone No	Phone Number- if available
Carrier	Carrier from which GOIS Pro has been accessed
Application Type	Type of the application from which user has accessed GOIS Pro
App. Ver	Version of the application
SQLite Ver	Version of SQLite
DB Ver	Database Version

Chapter 13: Edit User Profile

This part of the documentation helps you to understand how to edit a User Profile in GOIS Pro application. This chapter will broadly cover the points mentioned below.

- **General**
- **Security**
- **Address Detail**
- **Profile Settings**
- **Application Settings**
- **Display Settings**
- **Login History**

To Edit Profile: (Home>>Profile)

1. Click on the "Profile" link, this can be found on the top most right corner of the screen.
3. After clicking, you will be redirected to another page. A snapshot of the page is shown in figure: 5.13.1

General Tab

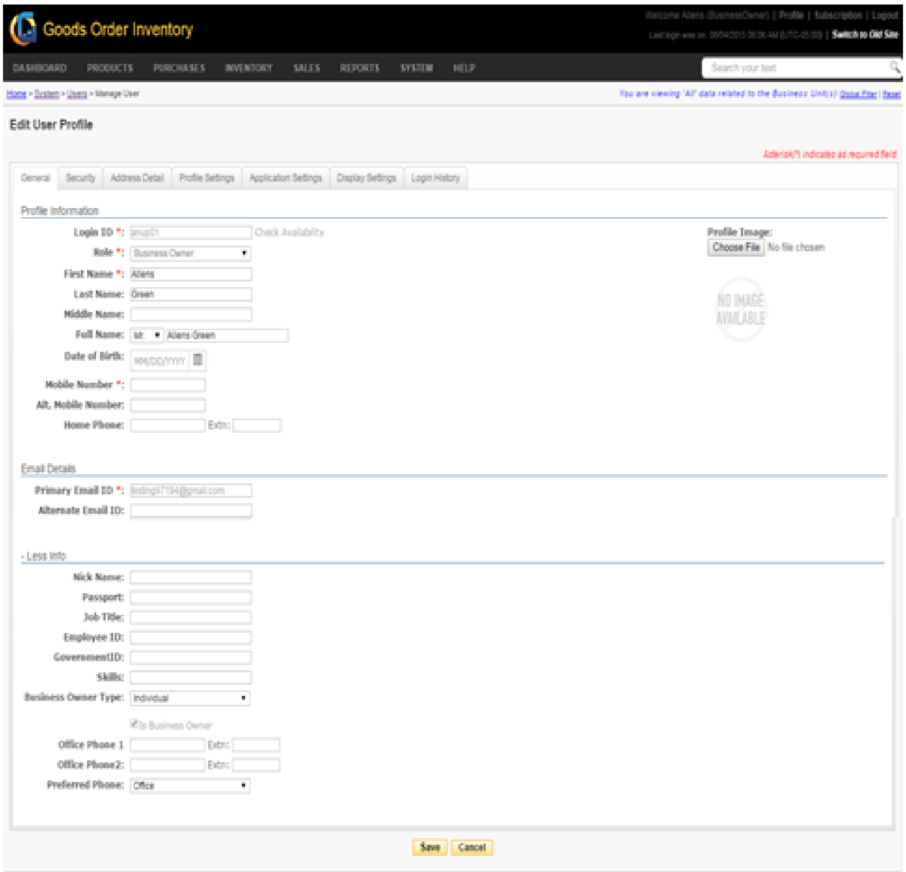


FIGURE 5.13.1

Profile Information	
Field	Description
Login ID	User credential (login ID) to login into the system
Check Availability	Click on this tab to check availability of login ID
Role	Assign role to the sub user from predefined role set
First Name	First name of the user
Last Name	Last name of the user
Middle Name	Middle name of the user
Full Name	Full name of the user
Date of Birth	Date of birth of the user
Mobile Number	Mobile number of the user
Alt. Mobile Number	Alternate mobile number of the user
Home Phone	Phone number of home
Extn.	Extension of phone number
Profile Image	Set an image for the user profile

Email Details	
Field	Description
Primary Email ID	Provide the primary email ID
Alternate Email ID	Provide alternate Email ID
Preferred Email	Preferred mail ID (Primary or Alternate).
Preferred Address	Preferred Address

More Info	
Field	Description
Nick Name	Nick name of the user
Passport	Passport number
Job Title	Title of the user’s job in an organization
Employment ID	User employee ID
Government ID	Government ID
Skills	Skills of the user
Business Owner Type	Business Owner type
Office Phone 1	Office Phone Number

Office Phone 2	Office Phone Number
Preferred	With most priority (Office, Home or Mobile)

Security Tab

Security Tab provides you a flexibility to maintain the security of a user account. You can change the password, activate security questions and see the last password change date.

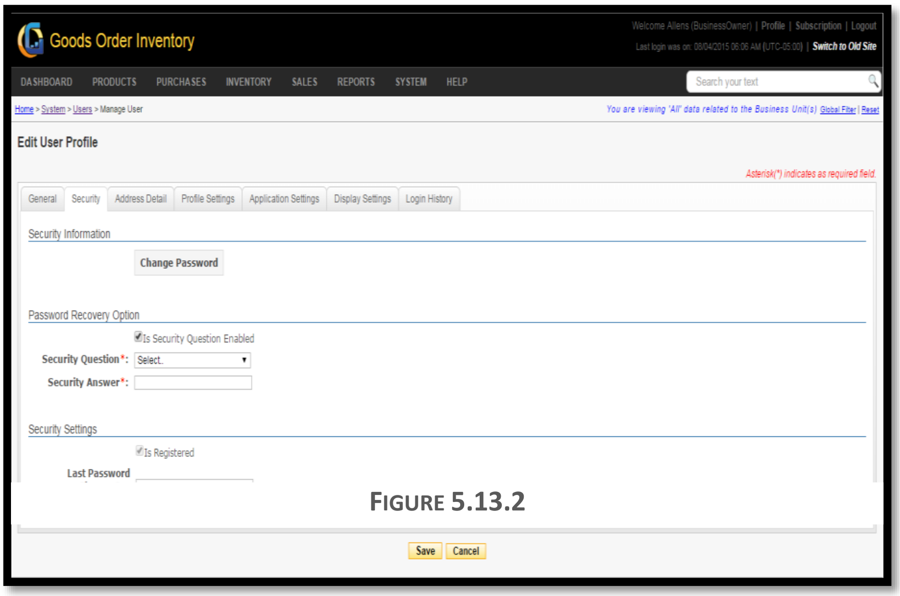


FIGURE 5.13.2

Security	
Field	Description
Change Password	Click on the button to change the password. After clicking a new popup will be opened, which will ask you to provide the old password to set the new password
Is Security Question Enabled	If this box is checked, user has to select a question to save the answer for the same. Which will later be used to restore the account
Security Question	Select a security question from the list of questions
Security Answer	Fill the answer with respect to the security question
Is Registered	Shows you the status of registered user
Last Password Change On	This field shows the date-time of the last changed password of a user account

Address Detail Tab

User can update their address detail by using this window. Billing and Shipping address details can be same or different, if both the addresses are same, then user has to select a checkbox “Same as billing address”. After filling all the details, user need to click on the save button. The snapshot of the page is shown in figure 5.13.3

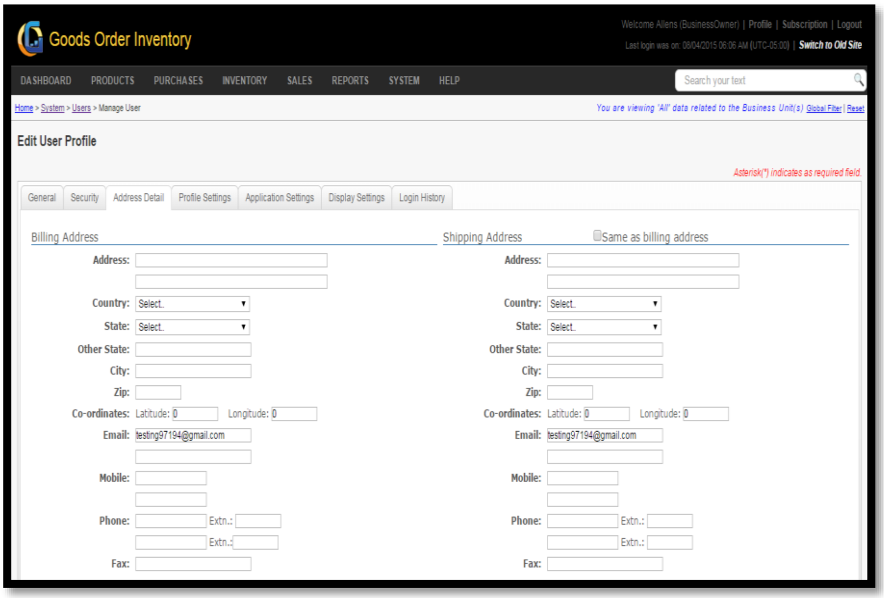


FIGURE 5.13.3

Billing Address	
Field	Description
Address	Billing Address
Country	Name of the country
State	Select state from the dropdown, sate will populate according to the country selected
Other State	If your state is not in the list, then provide it manually
City	Name of the city
Zip	Zip code
Co-ordinate	Longitude and Latitude
Email	Email address
Mobile	Mobile Number
Phone	Phone Number
Fax	Fax number
If all the fields of the shipping address are same as billing address, select the checkbox to copy the address from billing to shipping.	

Profile Settings Tab

This section provides four different settings to the user. Theme, Time zone, Date and Time format settings (for ‘Web’ and ‘Device’). User can change the theme by selecting one of the predefined themes. You can also select Time zone and different time format for ‘Web’ application and ‘Device’.

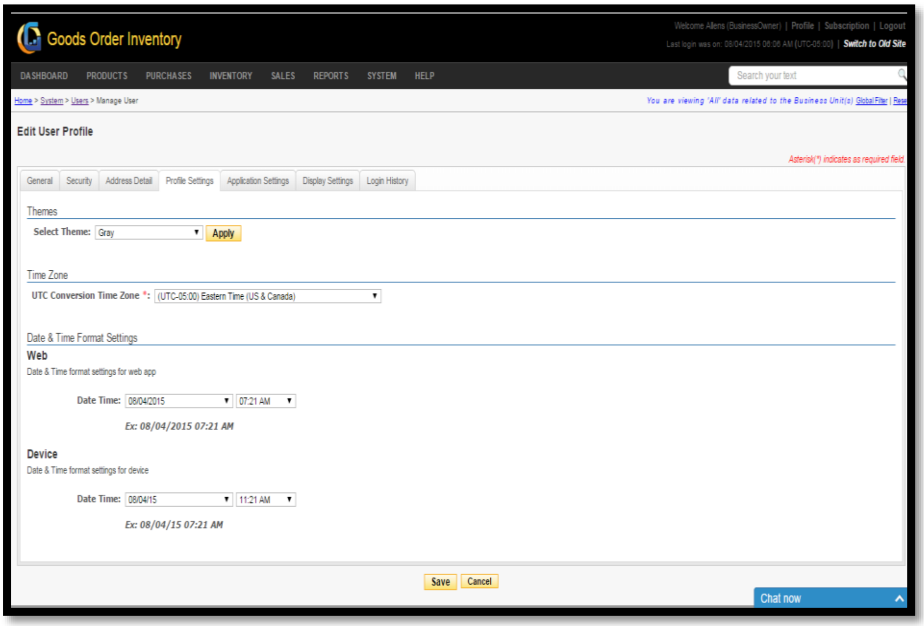


FIGURE 5.13.4

Profile Settings	
Field	Description
Select Theme	Select one of the themes from the predefined list
Apply	Click to apply theme
UTC Conversion Time Zone	Select the time zone
Date time (Web)	Select a needed format of Date & Time for We
Date Time (Device)	Select a needed format of Date & Time for Device

Note: “Application Settings” tab work same as described in the

Chapter 12.

Display Settings Tab

This part of documentation focusses on the explanation of Display settings that GOIS Pro provides. GOIS has a centralized window to set the display settings for all its module. Users can “Set Page Size”, Set Default Sorting for the list of screens provided in the display settings window. These settings can be different for Device as well as the Web.

The screens are divided into five different categories:

- Transactions
- System Entities
- Reports
- Product, Category Unit
- Popup Screens

The snapshot of the screen has been shown in figure: 5.13.5

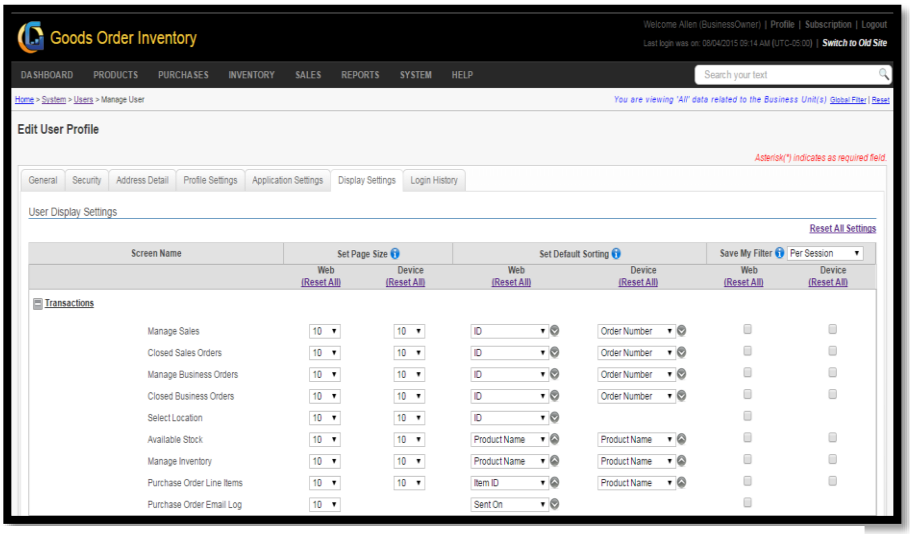


FIGURE 5.13.5

Transaction	
Field	Description
Save my Filter	User can save the filter with any one of the three option given: Per Session, Per Page, Across Sessions
Screen Name	User can select one or multiple screen by ticking the checkbox. User can also apply different setting for ‘web’ and ‘Device’.
Set Page Size	User can select one of the page size from the list of pre-defined page sizes.
Set Default Sorting	Select the default sorting field for each screen from the list of screen separately.
Note: Must click on the “Save settings” button to save the changes.	

Login history Tab

This window shows the login history, with some important details.

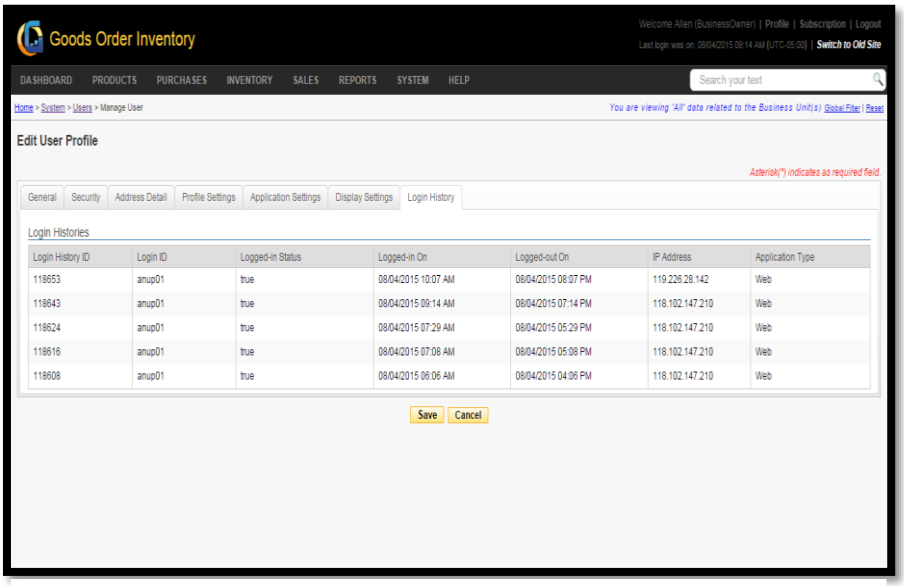


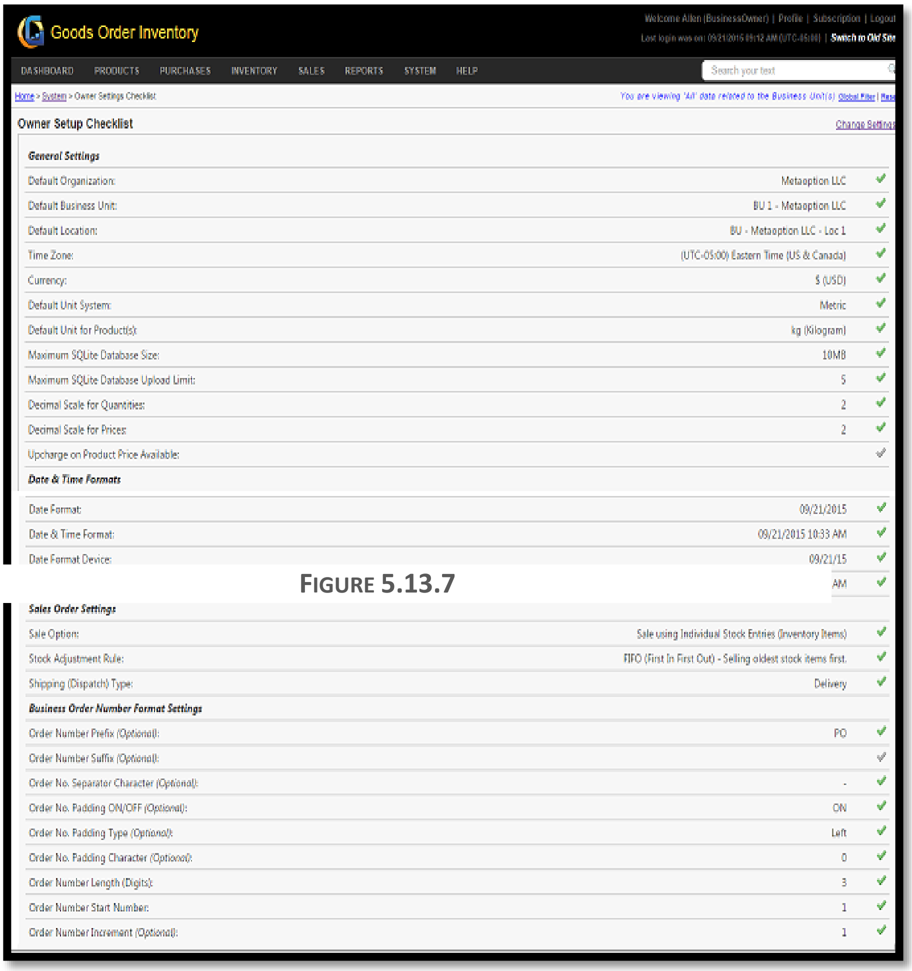
FIGURE 5.13.6

Login History	
Field	Description
Login History ID	Unique ID for each login
Login ID	Login ID from which user has logged in
Logged Status	Status of the Login
Logged On	Date & Time of Login
Logged Out On	Date & Time of Logout
IP Address	The IP address from which the user has logged in.
Application Type	Application type.

Owner Setup Checklist

This web page of GOIS provides the summarized list of setting details about the list of overall settings the Business owner is having with the system. This is a read only page for the user to get the details although; if user wants to change the setting he/she can click on the Change Setting hyperlink on the corner of the web Page.

The navigation for the system is given below.
(Home>>System>>Setup Checklist)


Goods Order Inventory
Welcome Allen (BusinessOwner) | Profile | Subscription | Logout
Switch to Old Site
DASHBOARD
PRODUCTS
PURCHASES
INVENTORY
SALES
REPORTS
SYSTEM
HELP
Search your text
Home > System > Owner Settings Checklist
Owner Setup Checklist
Change Settings
General Settings
Default Organization: Metaoption LLC
Default Business Unit: BU 1 - Metaoption LLC
Default Location: BU - Metaoption LLC - Loc 1
Time Zone: (UTC-05:00) Eastern Time (US & Canada)
Currency: $ (USD)
Default Unit System: Metric
Default Unit for Product(s): kg (Kilogram)
Maximum SQLite Database Size: 10MB
Maximum SQLite Database Upload Limit: 5
Decimal Scale for Quantities: 2
Decimal Scale for Prices: 2
Upcharge on Product Price Available:
Date & Time Formats
Date Format: 09/21/2015
Date & Time Format: 09/21/2015 10:33 AM
Date Format Device: 09/21/15
AM
Sales Order Settings
Sale Option: Sale using Individual Stock Entries (Inventory Items)
Stock Adjustment Rule: FIFO (First In First Out) - Selling oldest stock items first.
Shipping (Dispatch) Type: Delivery
Business Order Number Format Settings
Order Number Prefix (Optional): PO
Order Number Suffix (Optional):
Order No. Separator Character (Optional): -
Order No. Padding ON/OFF (Optional): ON
Order No. Padding Type (Optional): Left
Order No. Padding Character (Optional): 0
Order Number Length (Digits): 3
Order Number Start Number: 1
Order Number Increment (Optional): 1
FIGURE 5.13.7

Part 6: Entity

This part of the document explains all the entities that exist in the GOIS Pro. You can go through this part to know about all entities with their separate existence and their co-relation with other entities. This section will broadly explain about the entities mentioned below.

- **Chapter 14: "Organization**", describes about the functionalities provided by GOIS to manage Organization as an entity. This section will provide you knowledge about, Adding Organization to GOIS, Viewing list of organizations, making an existing organization enable or disable, editing the details of an organization and other functionalities related to this entity.
- **Chapter 15: "Business Unit"**, explains the functionalities provided by GOIS with respect to the Business Unit. This section will broadly cover functionalities like Adding new Business unit, Deleting existing Business unit, viewing the list of Business Unit, Editing the details and other functionalities related to the Business Unit.
- **Chapter 16: "Location"**, provide you knowledge about the functionalities that GOIS provides with respect to the location as an entity. This section will broadly cover explanation about functionality like Adding, Deleting, Editing details of the location and other functionalities.
- **Chapter 17: "Vendor"**, provide you knowledge about the functionalities that GOIS provides with respect to the Vendor as an entity in the system. This section will broadly explain the functionalities like Adding, Deleting, Editing details about the vendor and other functionalities that are provided to the Vendor as an entity in the GOIS Pro.
- **Chapter 18: Other**
    - **Vendor Contact**
    - **Product Category**
    - **Product Unit**
    - **Product Unit Conversions**

Chapter 14: Organization

This section of the document contains a description about the functionalities that GOIS Pro provides with respect to an organization as an entity. After going through this part you will learn how to Add, Delete, Edit, View details about Organization and other functionalities provided by GOIS Pro. Example: An organization may contain a set of items that belongs to a particular domain. All the transactional data into the GOIS-Pro system will be contained under an organization. Although you can have any number of organizations under one business owner account, but each organization and its related data cannot be interrelated to other organizations. Under the hierarchy of a business owner account, an Organization is at the top position across all the other entities.

To “Manage Organization” user has to navigate to the “Entities” section, this option can be found on the “System” dropdown menu. The navigation of the menu is shown below.

To Manage Organization: (Home>>System>>Entities>>Organization)

1. Move the mouse pointer to the “System” Section on the Menu Bar, a drop down menu will be displayed, click on the “Entities”.
2. User will be redirected to the page containing a list of organizations (if defined by business owner). For every business owner account, a default organization (My Organization) will be provided by the system which can be edited if required. Refer figure number:

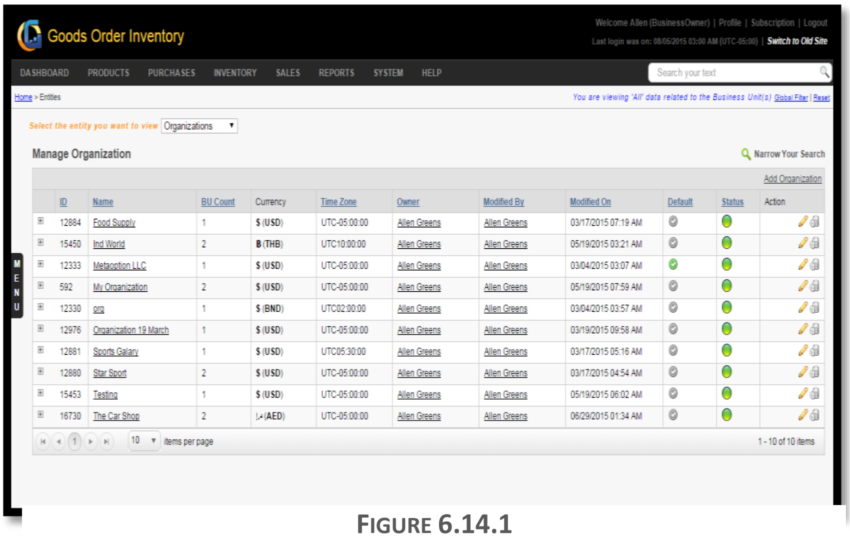


FIGURE 6.14.1

Manage Organization	
Field	Description
	Click on this icon to see details about the Business Unit associated with a Specific Organization.
ID	Unique ID of an Organization – system generated.
Name	Name of the Organization.

BU Count	Number of business units associated with a given Organization.
Currency	Currency to be used with an Organization.
Time Zone	Time zone in which the Organization Works.
Owner	Name of the Owner of specific Organization.
Modified By	Name of the person who modified the Organization.
Modified On	Date on which the organization details were modified.
Default	Default organization for a Business Owner.
Status	Active/inactive status of an organization.
Action	Click on this icon to edit details about the Organization.
Action	Click on this icon to delete the Organization.

Add Organization

To add a new organization under a business owner account, user needs to navigate to the "Entities" section that can be found in the "System" dropdown menu. The navigation of the menu is shown below along with the snapshots.

Steps to Add New Organization: (Home>>System>>Entities>>Organization>>Add Organization**)**

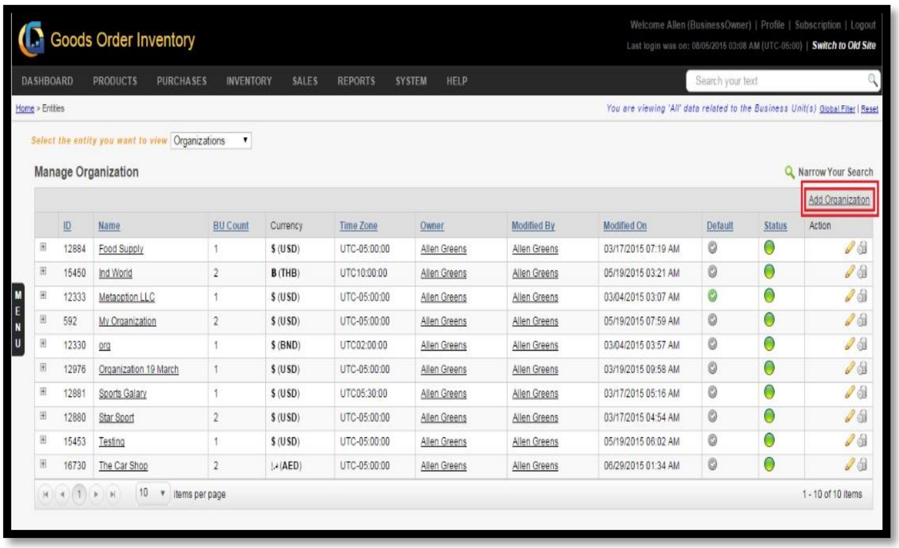


FIGURE 6.14.2

When you will click on the link marked on the above snapshot, a new window will appear, in which you are required to fill all details to add a new organization into the system. Snapshot and Steps to add organization is given below.

Steps to Add Organization:

Step 1: Click on the **Add Organization** link on the right corner as marked in the above snapshot.

Step 2: After Clicking on the link, a window will appear, snapshot of the window is shown below in **(Figure 6.14.3)**.

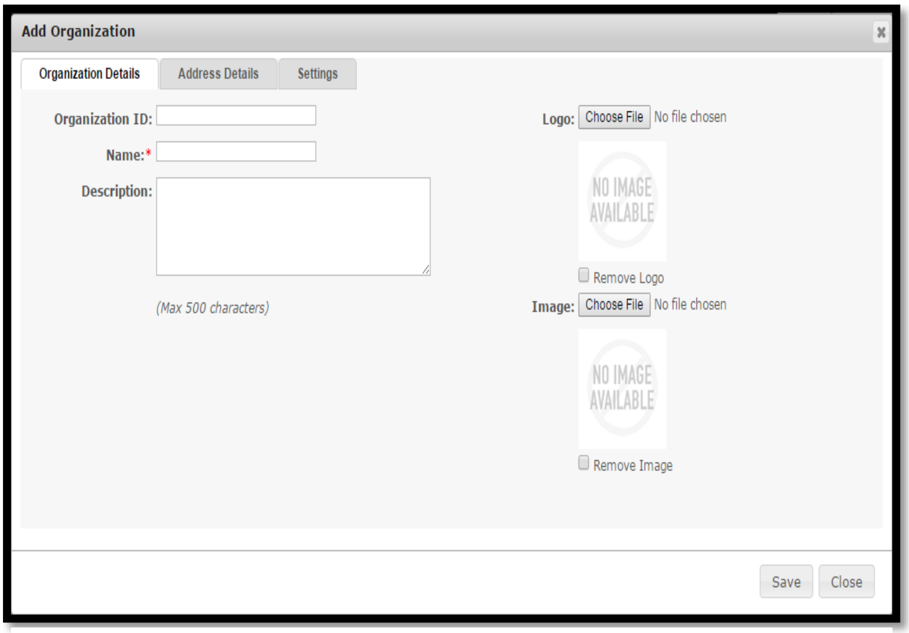


FIGURE 6.14.3

Step 3: Fill the details required in this window, * marked fields are the required field. The details about the field are shown below.

Organization Details	
Field	Description
Organization ID	Unique System generated Organization ID
Name	Name of the Organization
Description	Short description about the organization
Logo	Upload a logo of the organization.
Image	Upload image of the organization.
Remove Logo	Click to remove the logo.
Remove Image	Click to remove Image.
Save	Click to save the changes made.
Cancel	Click to cancel.

Step 4: Click on the Address Details Tab and fill the necessary information on the given form. You have to provide address details in this form. A snapshot of the page along with the details about the
fields are given in figure: 6.14.4

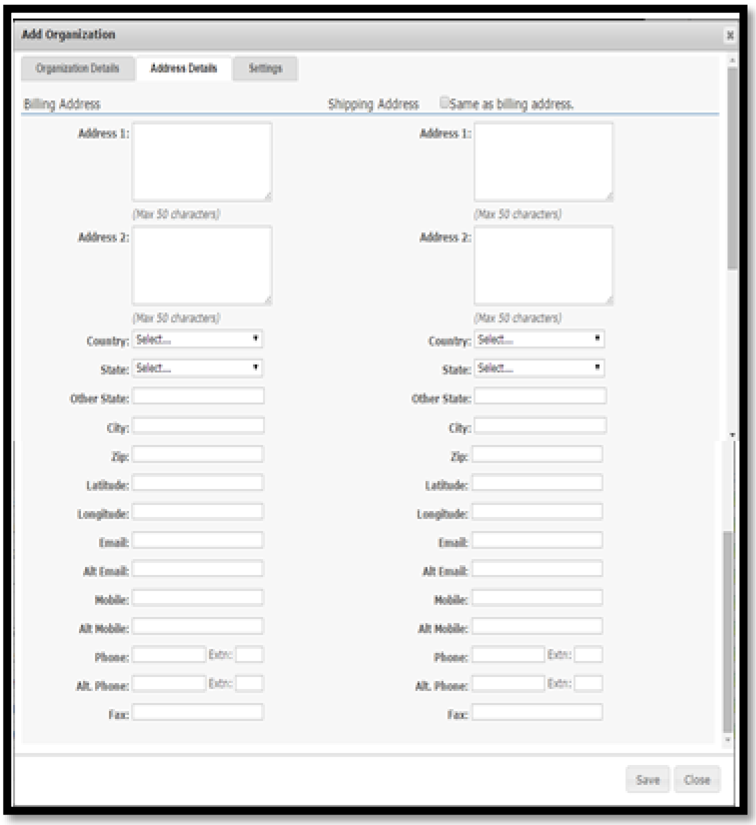


FIGURE 6.14.4

Address Details	
Fields	Description
Address 1	Text area to fill the address, maximum 50 characters are allowed.
Address 2	Text area to fill the address, maximum 50 characters are allowed.
Country	Name of the Country.
State	Name of the State.
Other State	If a state name does not exist in the list, the user can manually enter the state name.
City	Name of the city.
Zip	Zip code.
Longitude	Longitude of the address.
Latitude	Latitude of the address.
Email	Email Address.
Alt Email	Alternate Email address.
Mobile	Mobile Number.
Alt Mobile	Alternate Mobile Number.

Phone	Phone Number.
Alt Phone	Alternate Phone Number.
Fax	Fax number.

Note: Click on the checkbox if the shipping and billing address are same. “Same as billing address”

Step 5: After filling the details in the address form, click on the settings tab to set the “time zone” and “currency” to be used in the organization. The Snapshot is given below.

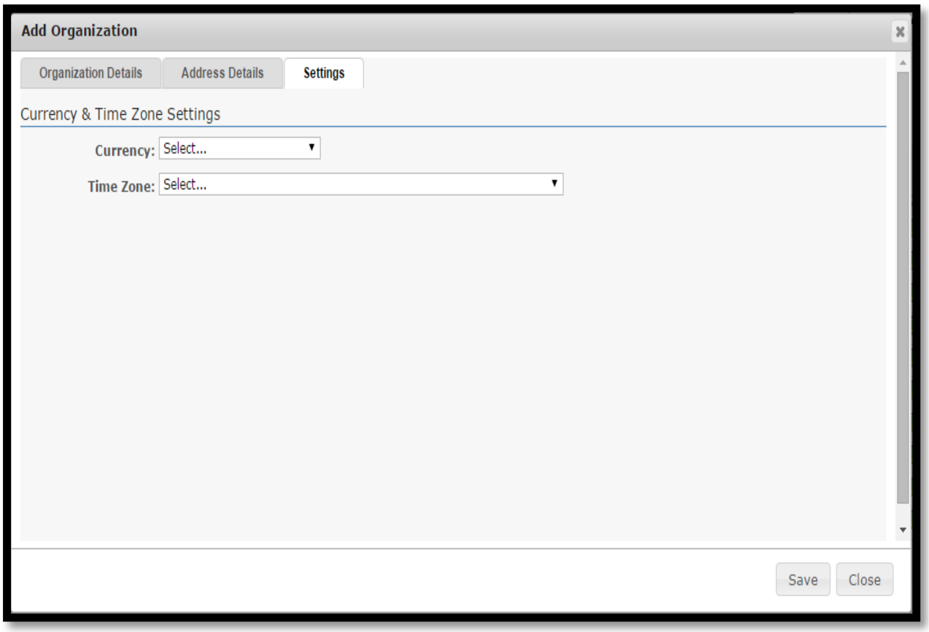


FIGURE 6.14.5

Step 6: After selecting the currency and time zone, click on save button to save the changes made.

Edit Organization:

To edit the details for an existing organization, user needs to click on the pencil icon marked in the given snapshot.

Steps to Edit Organization:

Step 1: User has to navigate to the Manage Organization window, and then click on the pencil icon marked on the below given snapshot.

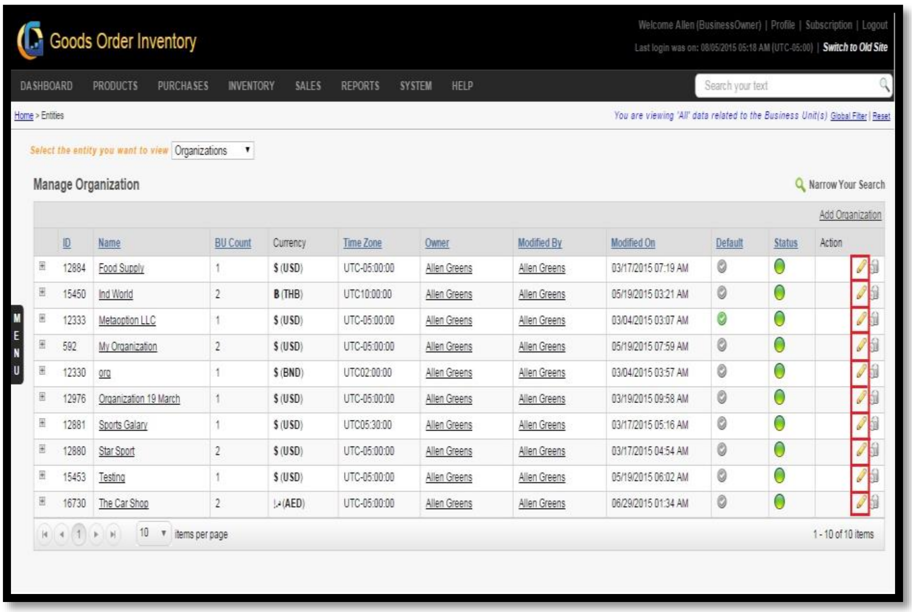


FIGURE 6.14.6

Step 2: After clicking on the pencil icon, an edit organization window will be displayed. A snapshot of the window is shown below.

Step 3: Edit the desired field information and hit save to fix the changes.

Delete Organization:

To delete an organization user needs to click on the icon marked in the below given snapshot. An organization can be deleted only if it doesn't contain any associated information. The default organization can't be deleted from the system.

Steps to Delete Organization:

Step 1: To delete an organization, you need to navigate to the Manage Organization window.

Step 2: Then you have to click on the delete icon against the specific organization to be deleted.

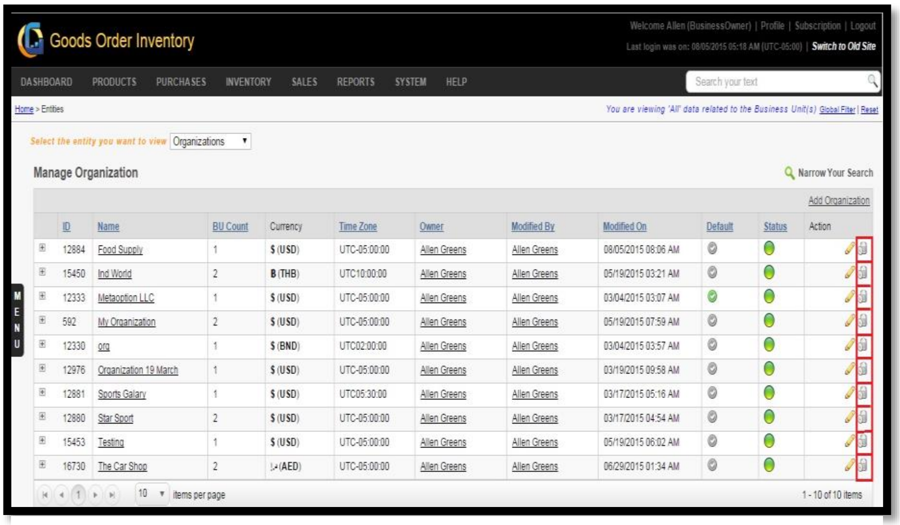


FIGURE 6.14.7

Step 3: After clicking on the icon an alert popup will be shown up, asking for the surety of the user to delete Organization. Click on Ok button.

Step 4: By clicking on OK button, the organization will get deleted with a success message.

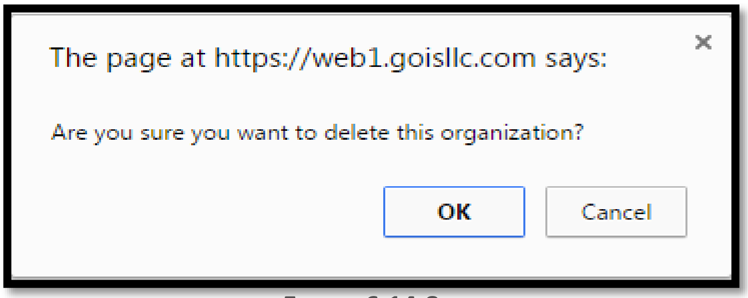


FIGURE 6.14.8

Organization Detail:

To view an Organization Detail, user needs to navigate to the "Entities" section that can be found under the "System" dropdown menu. The navigation of the menu is shown below along with the snapshots.

(Home>>System>>Entities>>Organization>> Click on the Organization name**)**

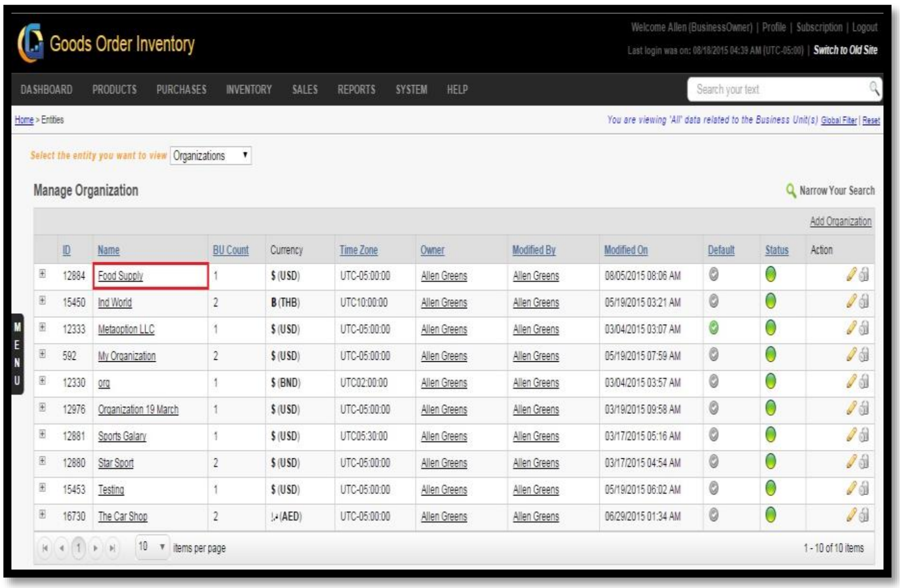


FIGURE 6.14.9

When user clicks on the name of an Organization he will be redirected to another page showing the details of the specific organization. A Snapshot of the page is shown in **(Figure 6.14.10)**.

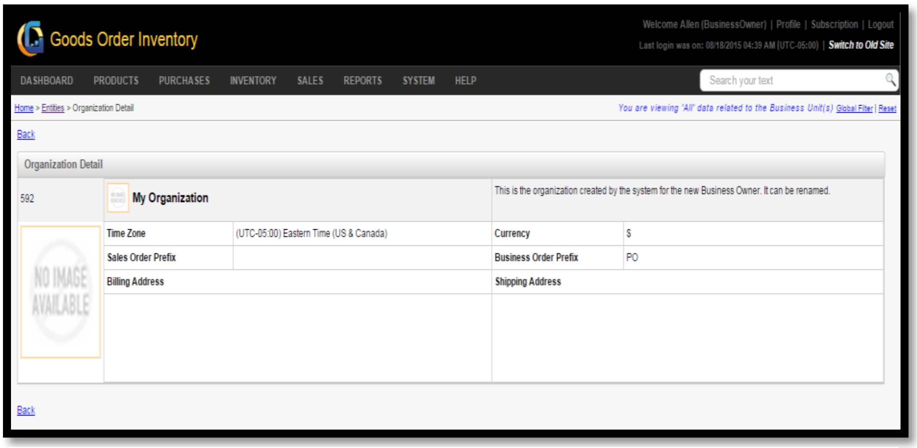


FIGURE 6.14.10

Chapter 15: Business Unit

This section of the document contains a description about the functionalities that GOIS Pro provides with respect to a "Business Unit" as an entity. After going through this part you will learn how to Add, Delete, Edit, View details about Business Unit and other functionalities provided by GOIS Pro with respect to the Business Unit.

As per the hierarchy of GOIS-PRO system, a Business Unit will be created under an organization. Further, any number of business units can be associated with each individual organization. All the business units under an organization will be using the same set of business products for different transactions made in the system.

For example: An organization can be GOIS, having one business unit is in Jersey City and other business unit is in New York.

To "Manage Business Unit" user has to navigate to the "Entities" section, this option can be found on the "System" dropdown menu. The navigation of the menu is shown below.

1. **To Manage Business Unit: (**Home>>System>>Entities>>Business Unit)
2. Move the mouse pointer to the "System" Section on the Menu Bar, a drop down menu will be displayed, click on the "Entities".
3. User will be redirected to the manage organization page.
4. Click on the dropdown "Select the entity you want to view", then from the list, choose Business Unit.
5. You will be directed to the manage business unit page where you can see the list of existing Business units created across different organizations. The snapshot of the page is given below.

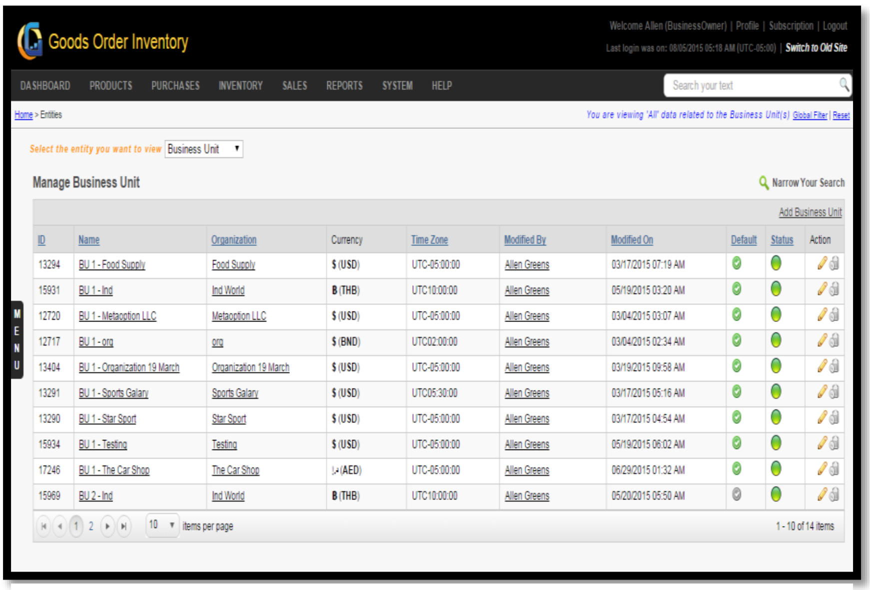


FIGURE 6.15.1

Manage Business Unit	
Field	Description
ID	Business Unit ID – system generated
Name	Name of the Business unit
Organization	An Organization to which the business unit comes under.
Currency	Currency in use under the given Business Unit
Time Zone	Time Zone in which the business unit operates.
Modified By	Name of the person who modified the Business Unit information.
Modified ON	Last modification date of a Business unit.
Default	Default Business Unit under an organization.
Status	Active/inactive status of a Business Unit.
Action	Click on this icon to edit the details of a BU.
Action	Click on this icon to delete the specific BU.

Add Business Unit

To add a new Business Unit under an organization, user needs to navigate to the "Entities" section that can be found under the "System" dropdown menu. The navigation of the menu is shown below along with the snapshots.

Steps to Add New Business Unit: (Home>>System>>Entities>>Business Unit>>Add Business Unit**)**

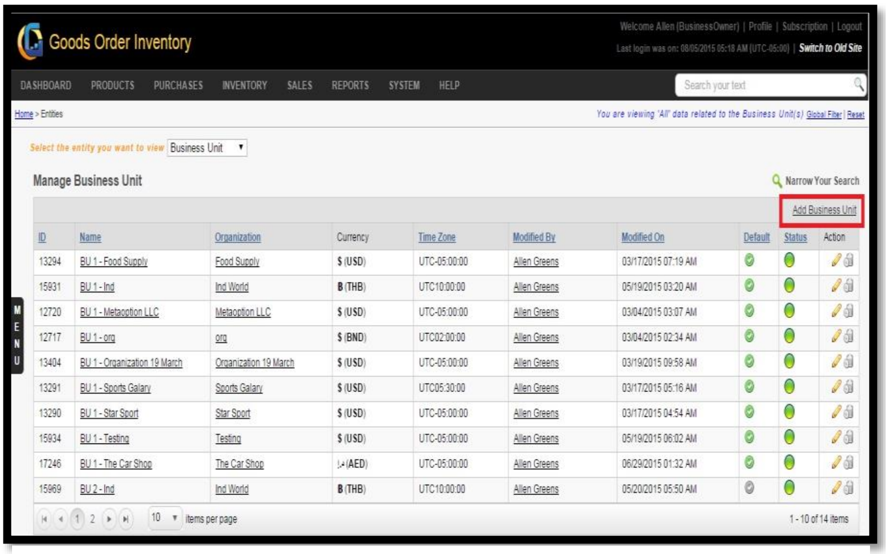


FIGURE 6.15.2

When you will click on the link marked on the above snapshot, a new window will appear in which you have to fill all details to add a new Business Unit in the system. Snapshot and Steps to add Business Unit is given below.

<u>Steps to Add Business Unit:</u>

Step 1: Click on the link “Add Business Unit” at the right corner as marked in the above given snapshot.

Step 2: After clicking, a new window will appear, asking to the user for the Organization to which the new Business unit will be associated. A Snapshot of the Window is shown below.

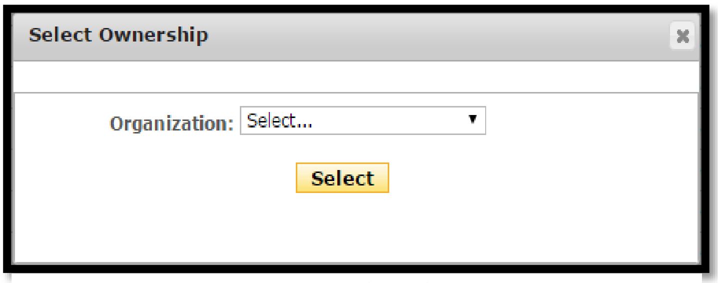


FIGURE 6.15.3

Step 3: Select an organization from the dropdown and click on the button.

Step 4: After clicking on the button, a new window will appear, fill the details about the new Business Unit in the window. A Snapshot of the window is shown below.

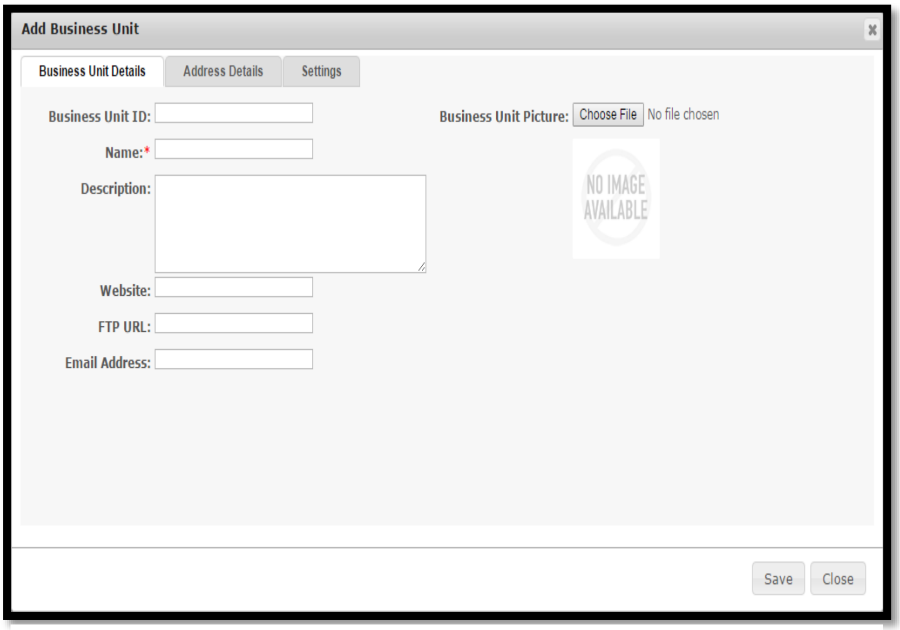


FIGURE 6.15.4

Business Unit details	
Field	Description
Business Unit ID	System generated Unique ID of Business Unit
Name	Name of the Business Unit
Description	Description about the Business Unit

Website	Website of the Business Unit
FTP URL	File Transfer Protocol URL.
Email Address	Email address of the Business Unit
Business Unit Picture	Picture of the Business unit.

Step 5: Fill the details about the Business unit in the "Business Unit Detail form", after filling the details, click on the Address Details Tab and fill the Address details of the Business Unit. Snapshot of the window is given below in **(Figure 5.15.5)**.

FIGURE 6.15.5

Address Details	
Fields	Description
Address 1	Text area to fill the address, maximum 50 characters are allowed.
Address 2	Text area to fill the address, maximum 50 characters are allowed.
Country	Name of the Country
State	Name of the State
Other State	If a state name does not exist in the list, user can manually enter the state name.

City	Name of the city.
Zip	Zip code.
Longitude	Longitude of the address
Latitude	Latitude of the address
Email	Email Address
Alt Email	Alternate Email address
Mobile	Mobile Number
Alt Mobile	Alternate Mobile Number
Phone	Phone Number
Alt Phone	Alternate Phone Number.
Fax	Fax number.

Step 6: After filling the address details, click on the settings tab. Snapshot of the page is given below.

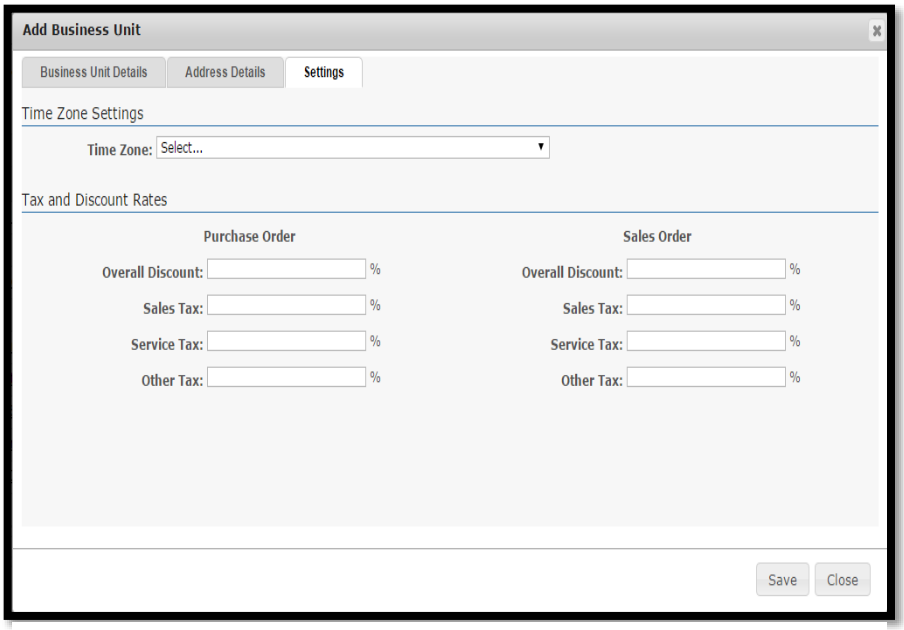


FIGURE 6.15.6

Time Zone Settings	
Field	Description
Time Zone	Select time zone for the Business Unit

Tax and Discount Rates (Purchase)	
Field	Description
Overall Discount	Set the default overall discount % for purchases
Sales Tax	Set default sales Tax percentage for Purchase
Service Tax	Set default Service Tax percentage for Purchase
Other Tax	Set default Other Tax percentage for Purchase

Tax and Discount Rates (Sales)	
Field	Description
Overall Discount	Set the default overall discount % for Sale
Sales Tax	Set default Sales Tax percentage for Sale
Service Tax	Set default Service Tax percentage for Sale
Other Tax	Set default Other Tax percentage for Sale

Step 7: After filling the details in the settings form, click on the save button to add a new Business Unit.

Note: Click on the close button if you want to close the window and cancel the process.

Edit Business Unit

To edit the details about the Business Unit user needs to click on the pencil icon marked in the below given snapshot.

Steps to Edit Business Unit:

Step 1: User has to navigate to the Manage Business Unit window, and then click on the pencil icon marked on the below given snapshot.

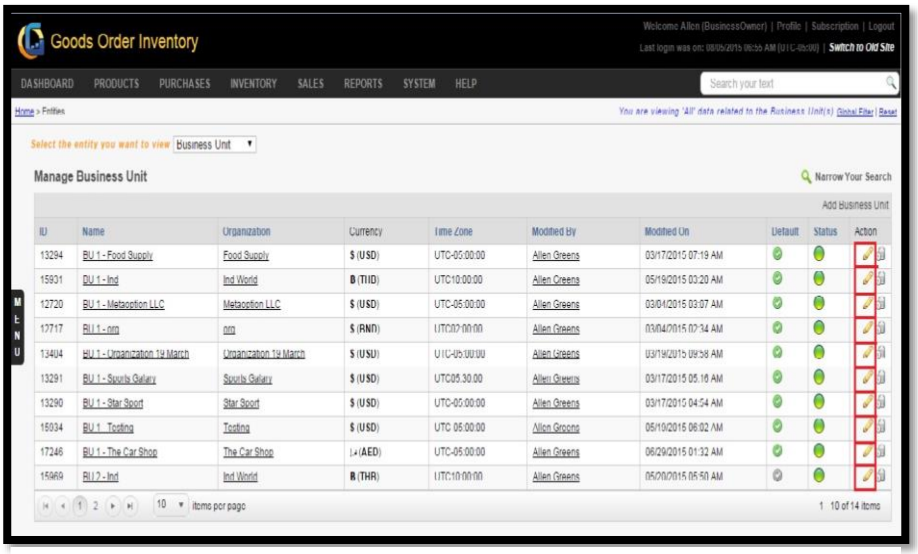


FIGURE 6.15.7

Step 2: After clicking on the pencil icon, an edit Business Unit window will be displayed. A Snapshot of the window is shown below.

FIGURE 6.15.8

Step 3: Edit the fields that need to be changed.

Step 4: Repeat Step-3 for Address Details and Settings tab, click on save button to save the changes made.

Delete Business Unit

To delete Business Unit user needs to click on the delete icon marked in the given snapshot. A Business Unit can be deleted if and only if it has no associated transactional data under purchase, inventory, sales, etc. Also default business unit for an organization cannot be deleted.

Steps to Delete Business Unit:

Step 1: To delete Business Unit you need to navigate to the Manage Business Unit window.

Step 2: Then you need to click on the delete icon against the specific Business Unit to be deleted as marked in the given snapshot.

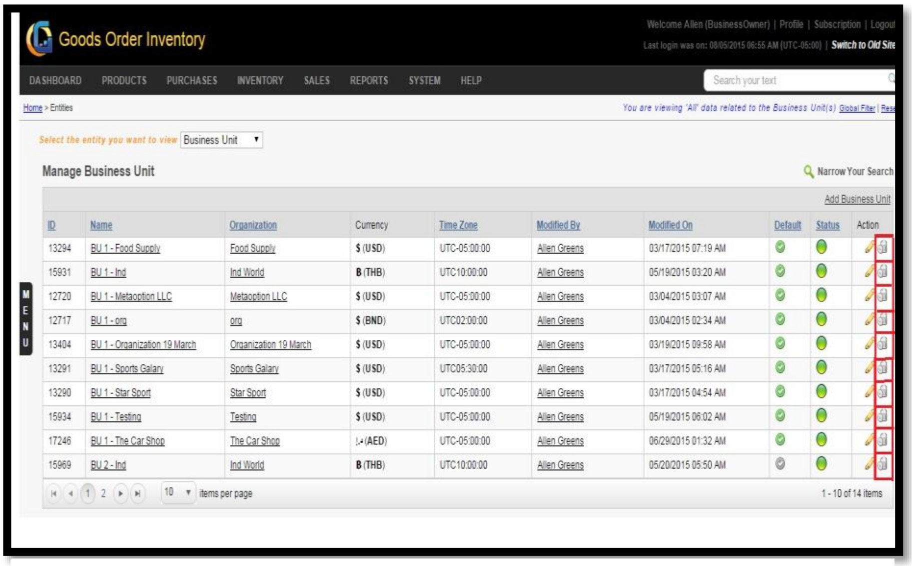


FIGURE 6.15.9

Step 3: After clicking on the icon an alert popup will be shown, asking for the surety of the user to delete the Business Unit. Click on Ok button to delete.

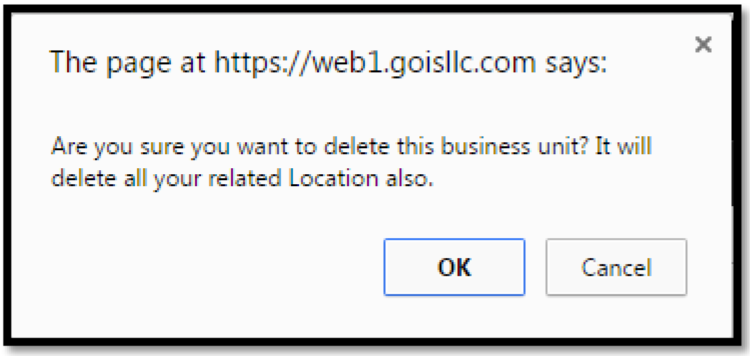


FIGURE 6.15.20

Business Unit Detail

To get a broader knowledge about a Business Unit, user has to navigate to the Business Unit Detail page. Navigation for the page is shown below. A section of the Page is shown in **(Figure 6.15.21)**.

Navigation for Business Unit Detail page: (Home>>System>>Entities>>Business Unit>>Click on the Business Unit Name**)**

The details provided about the Business Unit are divided into different sections on the detail page.

- Manage Business Unit
- Vendor Information
- Customer Information
- Location Information

Manage Business Unit
This section provides contact information of the Business Unit; fields can be seen in the **(Figure 6.15.21)**.

FIGURE 6.15.21

Manage Business Unit	
Field	Description
ID	Unique ID of the Business Unit
Email	email address of the Business Unit
Billing Address	Billing Address of BU
Web site	Web address of BU
FTP URL	FTP URL of a business unit – if any.
Shipping Address	Shipping address for the Business Unit
Phone Number	Phone Number of the Business Unit

Vendor Information

To see the list of the vendors associated with the Business Unit along with their details, you have to navigate to the Vendor Information section of the Business Unit Detail Page. Snapshot of the section is provided in **(Figure 6.15.22)**

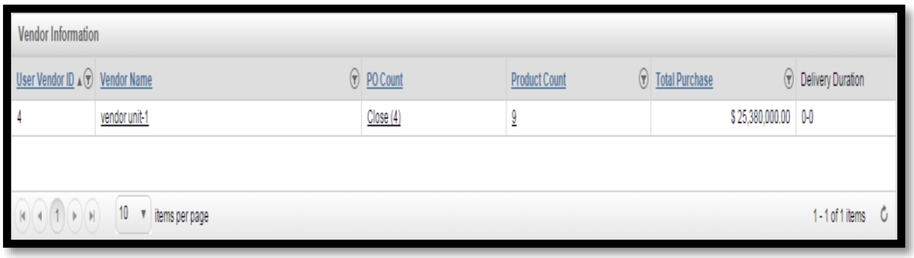


FIGURE 6.15.22

Vendor Information	
Field	Description
User Vendor ID	System generated vendor ID.
Vendor Name	Name of the vendor.
PO Count	Total number of Purchase Order made for this vendor.
Total Purchase	Amount of total purchase.
Delivery Duration	Approximate delivery time of PO by a given vendor – on the basis of past records.

Customer Information

To see the list of the Customers associated with the Business Unit along with their details, you have to navigate to the Customer Information section of the Business Unit Detail Page. Snapshot of the section is provided in **(Figure 6.15.23)**

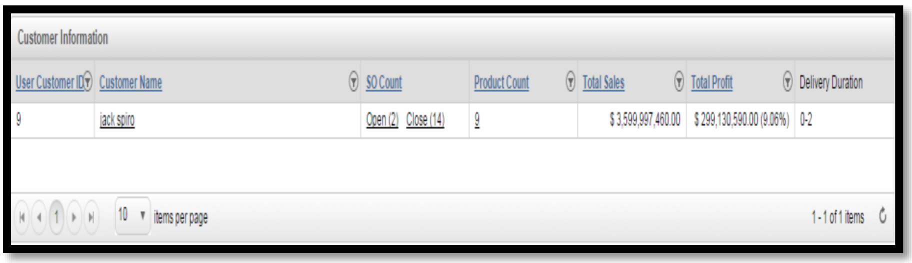
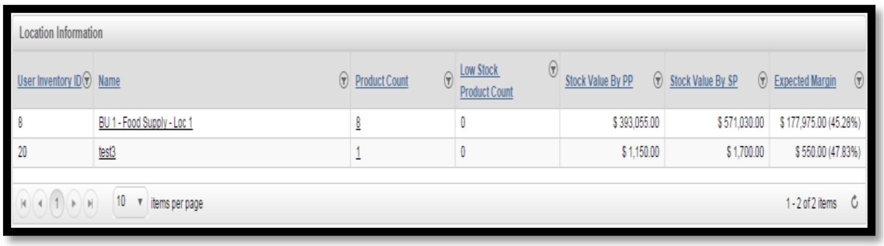


FIGURE 6.15.23

Customer Information	
Field	Description
User Customer ID	System generated customer ID.
Customer Name	Name of the Customer.
SO Count	Sales order count – against a specific customer.
Product Count	Total number of unique products sold to a specifc customer.
Total Sales	Total sales amount for a specific customer.
Total Profit	Total Profit amount made from a specific customer.
Delivery Duration	Approximate delivery time to a specifc customer – on the basis of past records.

Location Information

To view the list of locations associated with a Business Unit along with their details user has to navigate to the Location Information section of the Business Unit detail page. Snapshot of the section is given in **(Figure 6.15.24)**.



Location Information

User Inventory ID	Name	Product Count	Low Stock Product Count	Stock Value By PP	Stock Value By SP	Expected Margin
8	BU 1 - Food Supply - Loc 1	8	0	$ 393,055.00	$ 571,030.00	$ 177,975.00 (45.28%)
20	test3	1	0	$ 1,150.00	$ 1,700.00	$ 550.00 (47.83%)

1 10 items per page 1 - 2 of 2 items

FIGURE 6.15.24

Location Information	
Field	Description
User inventory ID	System generated inventory ID.
Name	Location name
Product Count	Total Product count at location.
Low Stock Product Count	Total number of products with low stock.
Stock value by PP	Total value of stock by purchase price.
Stock value by SP	Total value of stock by selling price.
Expected margin	Margin Expected.

Chapter 16: Location

This section of the document contains a description about the functionalities that GOIS Pro provides with respect to "Location" as an entity in the system. Here Location refers to a physical warehouse under an organization and business unit where you will be keeping all the stocks for different products. After going through this part you will learn how to Add, Delete, Edit, View Stock details exist in a Location and other functionalities provided by GOIS Pro with respect to Location.

To "Manage Location" user has to navigate to the "Entities" section, this option can be found on the "System" dropdown menu. The navigation of the menu is shown below.

To Manage Location:
(Home>>System>>Entities>>Location)

1. Move the mouse pointer to the "System" Section on the Menu Bar, a drop down menu will be displayed, click on the "Entities".
2. By Default, the user will be redirected to the page containing the list of organizations.
3. Click on the dropdown "Select the entity you want to view", from the list select "Location".
4. A list of "Locations" will be displayed (if already added) to GOIS Pro or you may add the desired number of locations. Refer **(Figure 6.16.1)**.

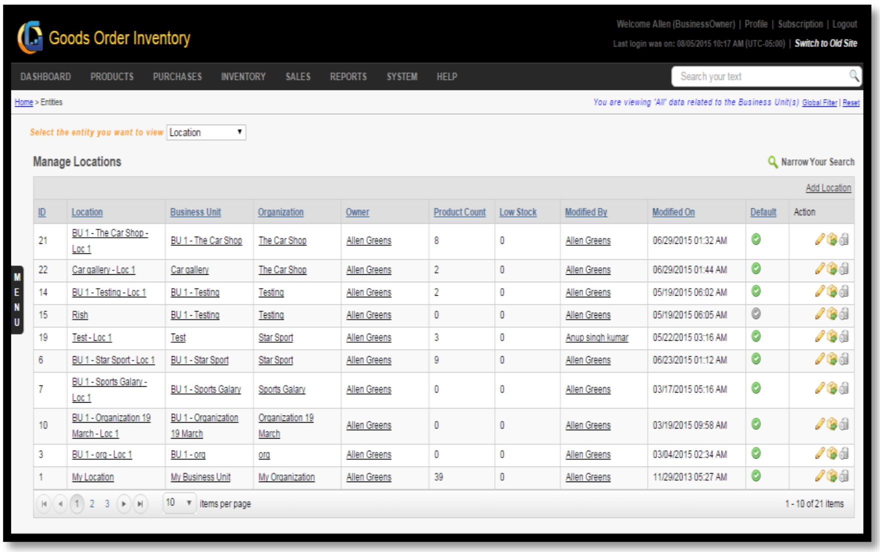


FIGURE 6.16.1

Manage Location	
Field	Description
ID	Unique ID of the location –system generated
Location	Name of the location
Business Unit	Name of the Business Unit to which the Location belongs.
Organization	Name of the Organization to which the Location belongs.
Owner	Name of the Owner of a Location
Product Count	Total number of products available at a location.
Low Stock	Low stock product count at a location.
Modified By	Name of the person, modified the location information.
Modified On	Date of modification.
Default	Default location for a business unit.
Action	Click on this Action icon to edit the location details.
Action	Click on this icon to view stock of a specific location – view available stock in this location.
Action	Click on this icon to delete specific location.
Add Location	Click on this Link to add a new location.

Add Location

To add a new "Location", User needs to navigate to the "Entities" section that can be found in the "System" dropdown menu. The navigation of the menu is shown below along with the snapshots.

Steps to Add Location:
(Home>>System>>Entities>>Location>>Add Location**)**
When you will click on the link marked on the above snapshot, a new window will appear in which you have to fill all details to add a new Location in the system. Snapshot and Steps to add Location is given below.

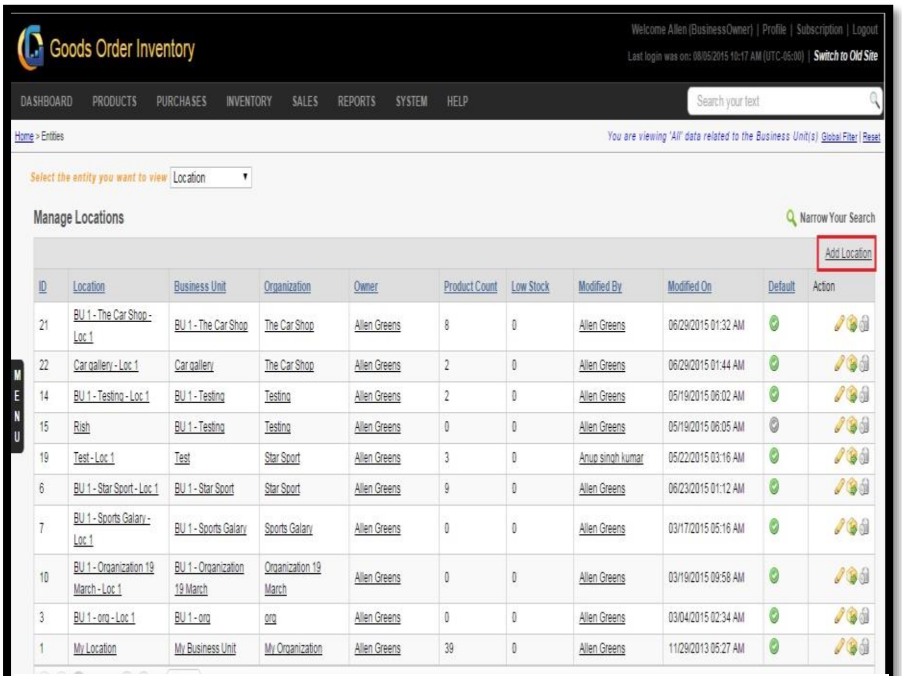


FIGURE 6.16.2

<u>Steps to Add Location:</u>

Step 1: Click on the tab "Add Location" at the right corner as marked in the above given snapshot.

Step 2: After clicking on the Link, a "Select Ownership" window will appear, asking the user to choose the Organization and Business Unit to which the new Location will be associated. A Snapshot of the Window is shown below.

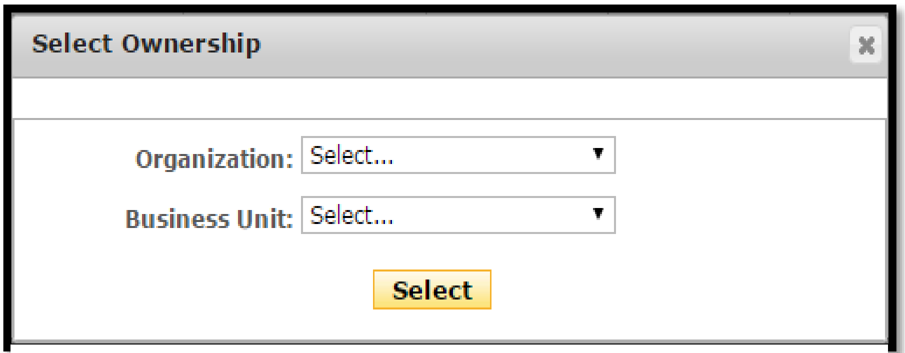


FIGURE 6.16.3

Step 3: Select an organization and Corresponding Business Unit from the dropdown, and click on the button “Select”.

Step 4: After clicking on the button, a new window will appear, fill the details about the new Location in the given form. A Snapshot of the window is shown below.

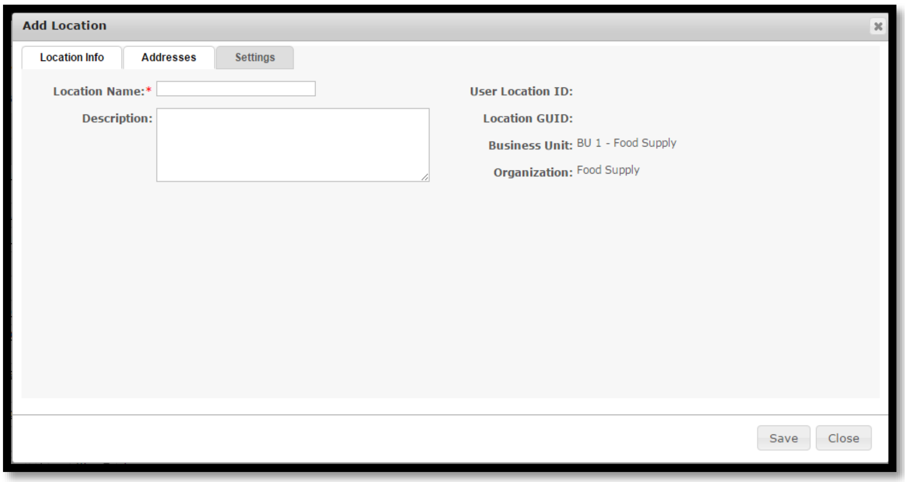


FIGURE 6.16.4

Add Location (Location Info)	
Field	Description
Location Name	Name of the organization (* Required Field)
Description	Description about the Location
User Location ID	System generated unique ID for a given location.
Location GUID	System generated ID.
Business Unit	Name of the Business Unit with which the location is associated.
Organization	Name of the Organization with which the location is associated.

Step 5: After filling the details about the Location in the “Location Info form”, click on the Addresses Tab and fill the Address details of the Location. Snapshot of the window is given below.

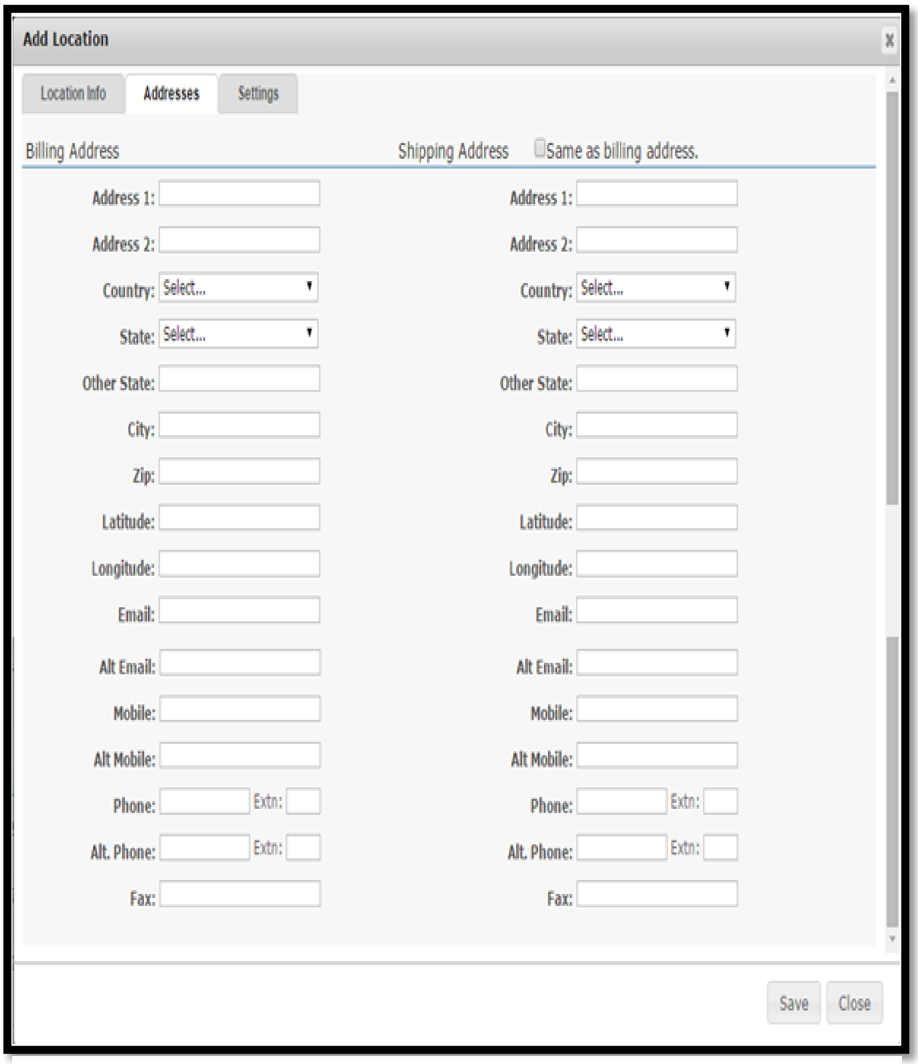


FIGURE 6.16.5

Address Details	
Fields	**Description**
Address 1	Text area to fill the address.
Address 2	Text area to fill the address.
Country	Name of the Country
State	Name of the State
Other State	If a state name does not exist in the list, the user can manually enter the state name.
City	Name of the city.
Zip	Zip code.
Longitude	Longitude of the address
Latitude	Latitude of the address
Email	Email Address
Alt Email	Alternate Email address
Mobile	Mobile Number
Alt Mobile	Alternate Mobile Number

Phone	Phone Number
Alt Phone	Alternate Mobile Number.
Fax	Fax number.

Step 6: After filling the address details, click on the settings tab to check the currency to be used under the new location. Snapshot of the page is given below.

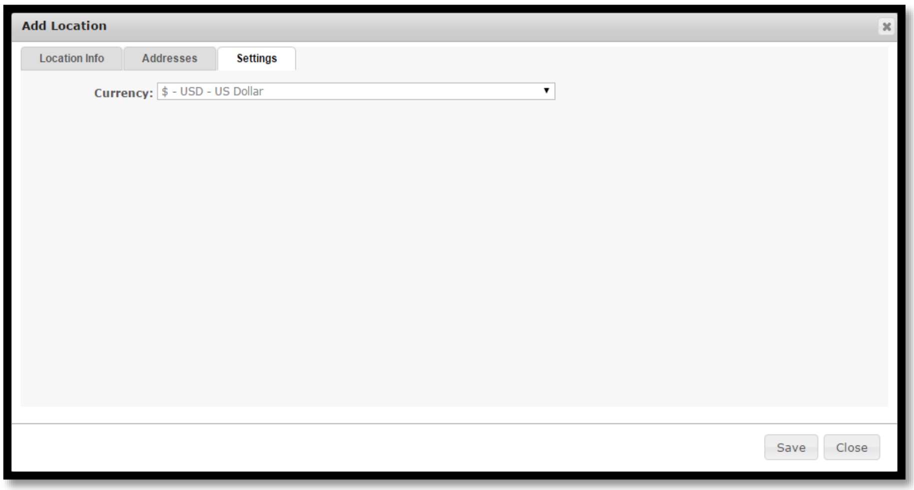


FIGURE 6.16.6

Note: After filling all the necessary details, user must click on the save button tab to save the changes made and to add new Location.

Edit Location

To edit the details about the Location user needs to click on the icon marked in the below given snapshot.

Steps to Edit Location details:

Step 1: User has to navigate to the Manage Locations window, and then click on the icon marked on the below given snapshot.

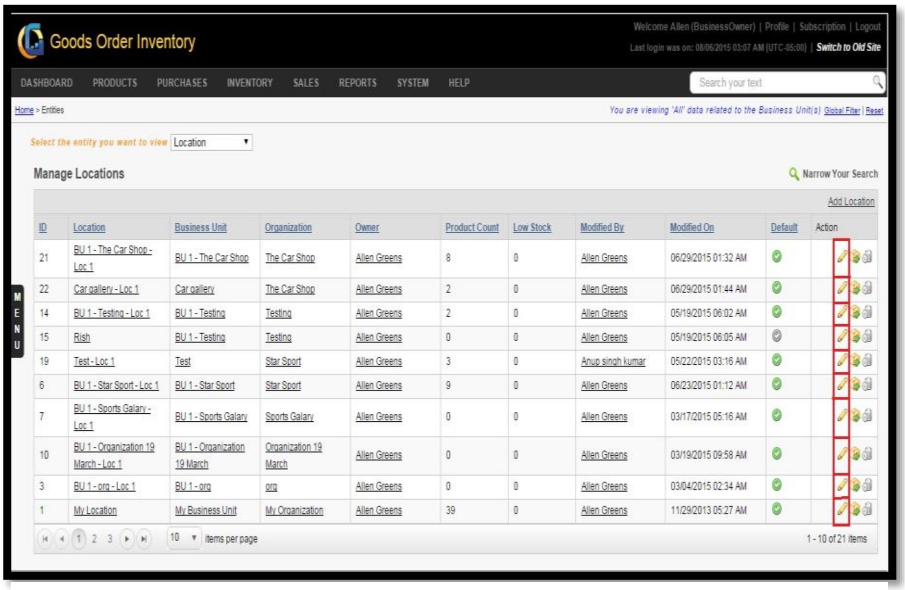


FIGURE 6.16.7

Step 2: After clicking on the icon an "Edit Location" window will be displayed. A snapshot of the window is shown below.

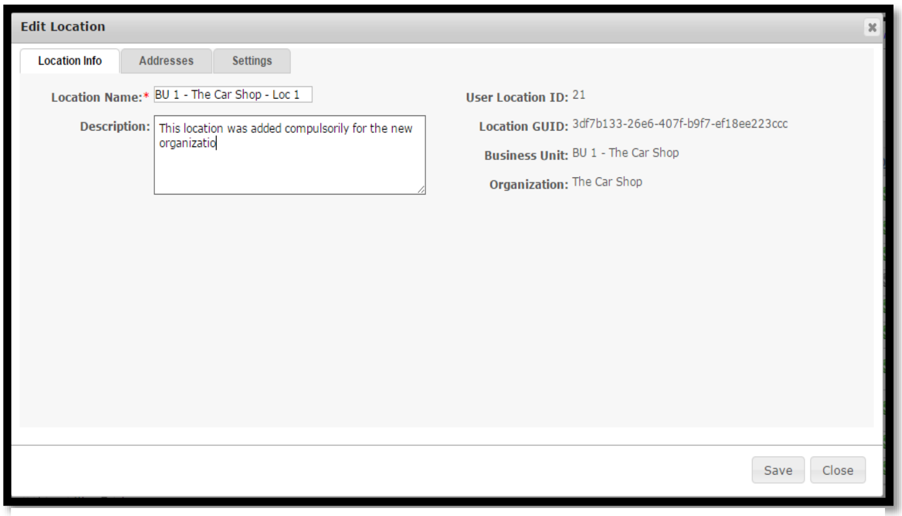


FIGURE 6.16.8

Step 3: Edit the fields that need to be changed.

Step 4: Repeat Step-3 for Addresses and Settings tab, click on save button to save the changes made.

Delete Location

To delete Location user needs to click on the icon marked in the below given snapshot.

Steps to Delete Location:

Step 1: To delete Location you need to navigate to the Manage Location window.

Step 2: Then you have to click on one of the icons for the specific Location marked in the below given snapshot.

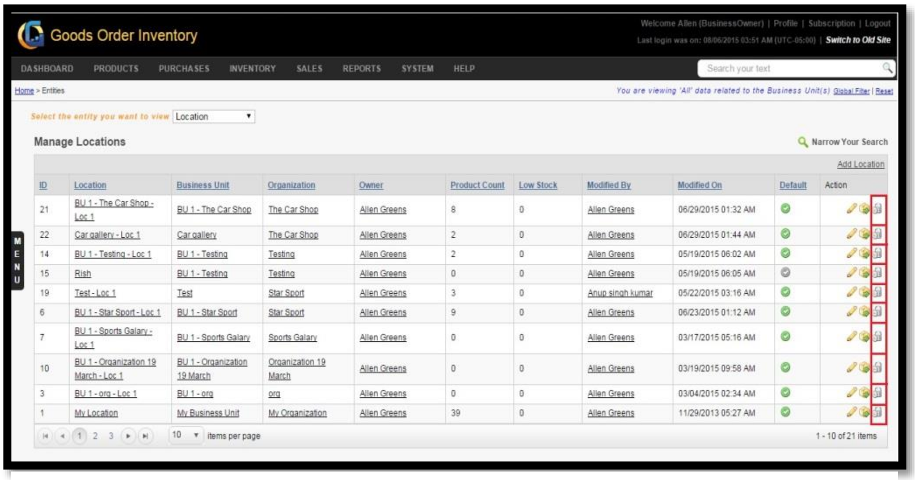


FIGURE 6.16.9

Step 3: After clicking on the icon an alert popup will be shown, asking for the surety of the user to delete Location. Click on Ok button

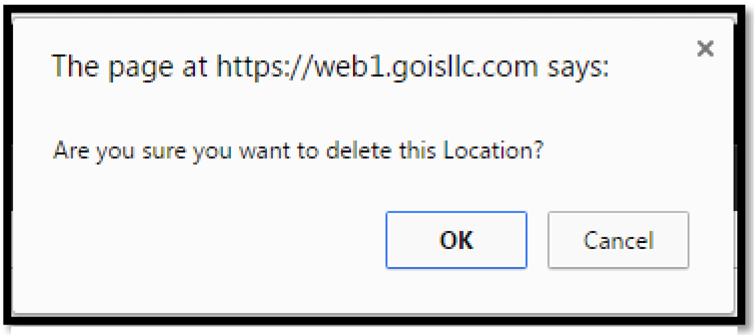


FIGURE 6.16.10

View Available Stock

To view available stock in a Location user needs to click on the icon marked in the below given snapshot.

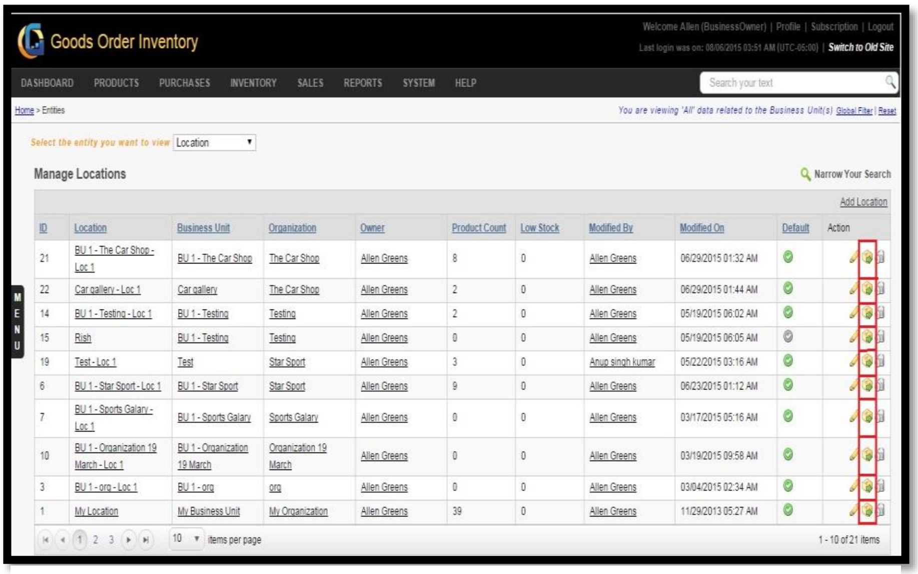


FIGURE 6.16.11

After clicking on the icon marked in the above given snapshot, you will be redirected to another window showing the list of the Products along with their stock and other details at a specific location.

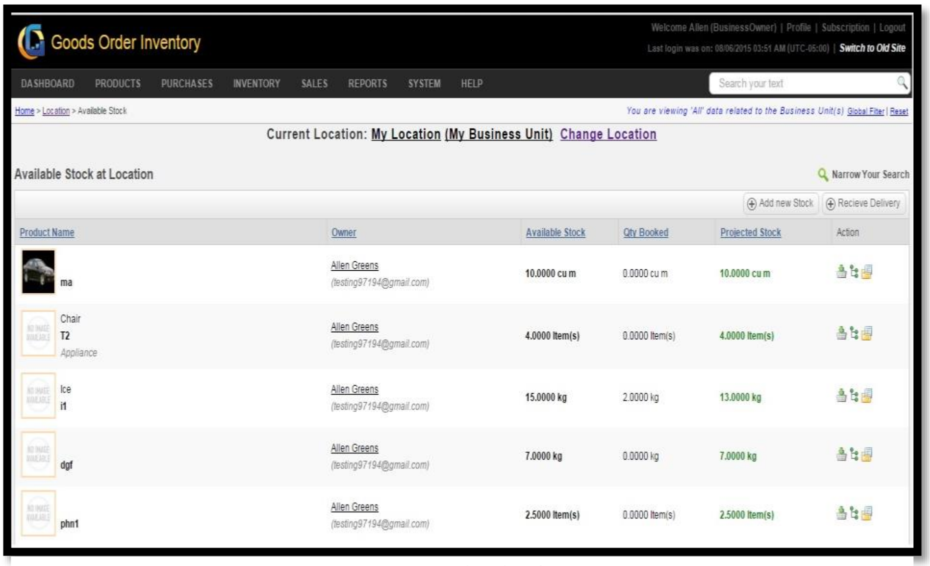


FIGURE 6.16.12

Available Stock at a location	
Field	Description
Product Name	Name of the Product
Owner	Owner name
Available Stock	Total available stock of a product.
Qty Booked	Quantity Booked
Projected Stock	Quantity on hand available for sale.
Action	Click on this icon to import product from another location.
Action	Click on this icon to view stock entries.
Action	Click on this icon to view transaction details.
Add new Stock	Click on this button to Add new stock at this location.
Receive delivery	Click on this button to receive delivery at this location.

Location Detail

To get the details about the Location, with respect to Inventory, Transactions, Stock Adjustment and other details, user have to navigate to the Location listing page where user has to click on the Location Name **(Figure 6.16.13)** and you will get redirected to Location Detail Page containing relevant information with the specific Location. **(Figure 6.16.14).**

After clicking on any of the Location Name, user will get redirected to another page, a

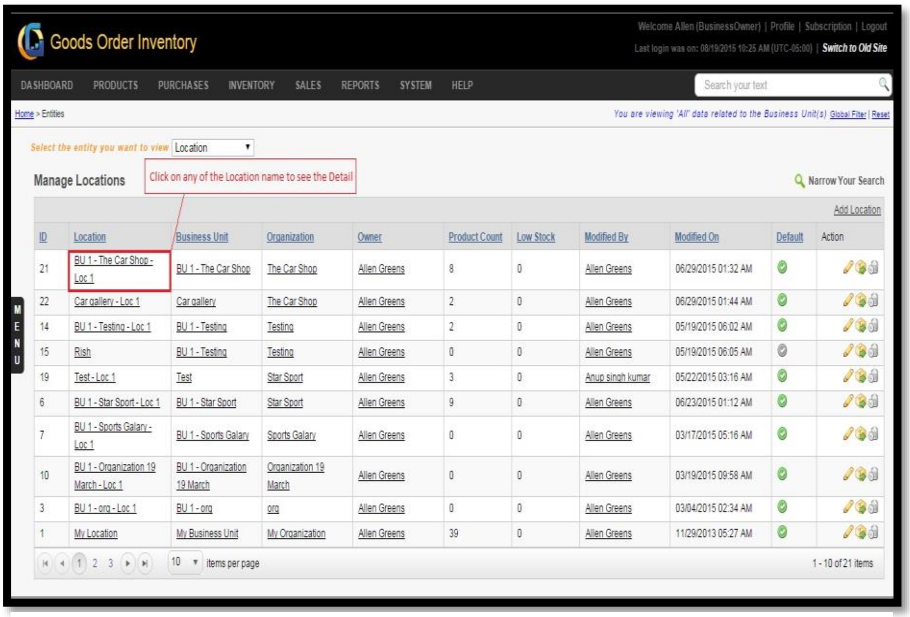


FIGURE 6.16.13

section of that has been shown in **(Figure 6.16.14)**. The Location Detail Page is divided into five different sections providing all relevant information with respect to a specific Location.

- **Inventory Information**
- **Inventory/Stock Information**
- **Transaction Information**
- **Import and Transfer Information**
- **Stock Adjustment Detail**

Inventory Information

This section provides detail about the Inventory at a location. The Snapshot of the Section is shown in **(Figure 6.16.14)**.

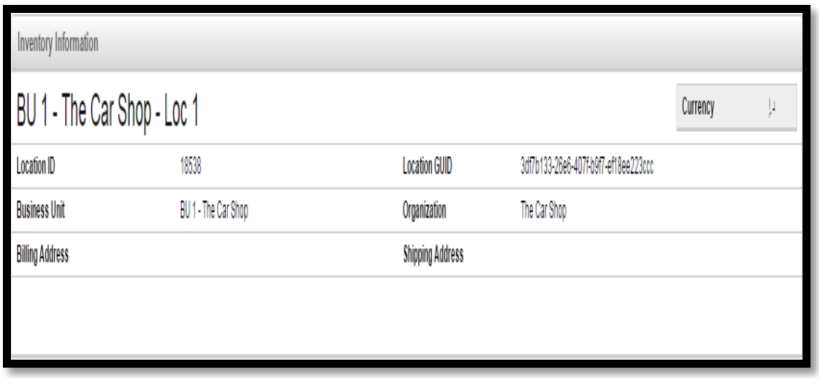


FIGURE 6.16.14

Inventory Information	
Field	Description
Location ID	Unique ID of the Location
Location GUID	System generated group user ID.
Business Unit	Name of the BU under which the Location resides.
Organization	Name of the Organization under which the Location resides.
Billing Address	Billing Address for a location.
Shipping Address	Shipping Address for a location.

Inventory/Stock Information

This section of the page provides the Stock and Inventory information at a particular location. Snapshot of the section is provided in the **(Figure 6.16.15)**.

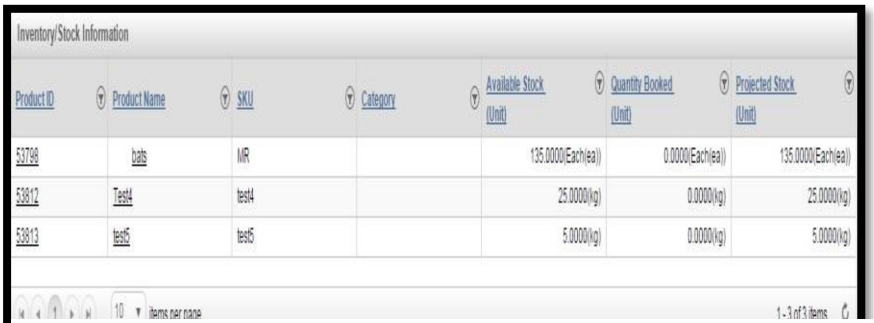


FIGURE 6.16.15

Inventory/Stock Information	
Field	Description
Product ID	Unique ID of the Product
Product Name	Name of the Product
SKU	Product number/SKU#
Category	Category of a product
Available Stock (Unit)	Total Stock available at the location
Quantity Booked (Unit)	Total Quantity booked.
Projected Stock (Unit)	Qty. on hand available for sale.

Transaction Information

To get the information related to all the transactions happened at a specific location user needs to refer to this section of the page. **(Figure 6.16.16)**

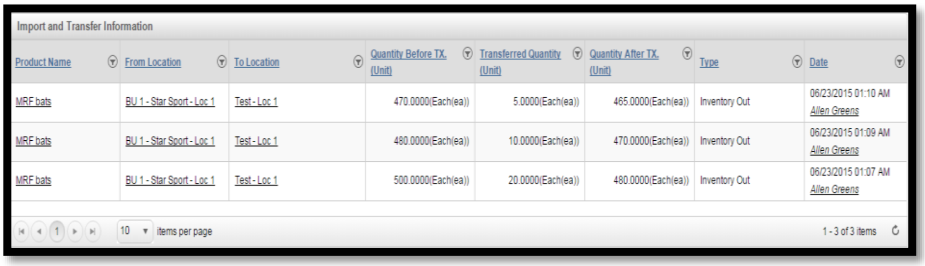
FIGURE 6.16.16

Transaction Information	
Field	Description
Category	Category of the Transaction.
Product Name	Name of the Product transacted.

Quantity Before TX	Quantity Before Transaction
Transferred Quantity	Transferred Quantity.
Quantity After Transaction	Quantity after Transaction
Type	Type of transaction (Inventory In, Inventory Out)
Date	Date of transaction

Import and Transfer Information

To get the knowledge about the transfer and import of product to and from a specific location user needs to refer this section of the Location Detail Page. (Figure 6.16.17).



Import and Transfer Information

Product Name	From Location	To Location	Quantity Before TX. (Unit)	Transferred Quantity (Unit)	Quantity After TX. (Unit)	Type	Date
MRF bats	BU 1 - Star Sport - Loc 1	Test - Loc 1	470.0000(Each(ea))	5.0000(Each(ea))	465.0000(Each(ea))	Inventory Out	06/23/2015 01:10 AM Allen Greens
MRF bats	BU 1 - Star Sport - Loc 1	Test - Loc 1	480.0000(Each(ea))	10.0000(Each(ea))	470.0000(Each(ea))	Inventory Out	06/23/2015 01:09 AM Allen Greens
MRF bats	BU 1 - Star Sport - Loc 1	Test - Loc 1	500.0000(Each(ea))	20.0000(Each(ea))	480.0000(Each(ea))	Inventory Out	06/23/2015 01:07 AM Allen Greens

1 10 items per page 1 - 3 of 3 items

FIGURE 6.16.17

Import and Transfer Information	
Field	Description
Product Name	Name of the Product
From Location	Transferred from the Location
To Location	Transferred to Location
Quantity Before Tx.	Quantity before transaction
Transferred Quantity	Total quantity transferred
Quantity After Tx.	Quantity left after the transaction
Type	Type of Transaction (Inventory IN or Inventory Out)
Date	Date of Import & transfer.

Stock Adjustment Detail

The User can refer to this section for details regarding stock adjustment. Snapshot of the section is shown in **(Figure 6.16.18)**.

FIGURE 6.16.18

Stock Adjustment Detail	
Field	Description
ID	Unique ID of stock adjustment log
Inv Item	Unique ID of inventory item
Product	Product Number and Product Name
Previous Qty	Qty. before adjustment
Adjusted Qty	Adjusted Qty.
After Adjustment	Qty. after adjustment
Reason	Stock adjustment reason
Note	Stock adjustment note
Date	Stock adjustment date and time.

Chapter 17: Vendor

This section of the document contains a description about the functionalities that GOIS Pro provides with respect to “Vendor” as an entity in the system. After going through this part you will learn how to Add, Delete, Edit, View details about Vendors and other functionalities provided by GOIS Pro with respect to vendors. Once you define a vendor, you may select the vendor from the vendor list to map the same with purchase orders.

To “Manage Vendors” user has to navigate to the “Entities” section, this option can be found on the “System” dropdown menu. The navigation of the menu is shown below.

To Manage Vendors:
(Home>>System>>Entities>>Vendor)

1. Move the mouse pointer to the “System” Section on the Menu Bar, a drop down menu will be displayed, click on the “Entities”.
2. User will automatically be redirected to the page containing the list of organizations.
3. Click on the dropdown “Select the entity you want to view”, from the list select “Vendor”.
4. A list of “Vendor” will be displayed if already added to GOIS Pro. The snapshot of the page is given below. If you haven’t added any vendor yet into the system, you may add it.

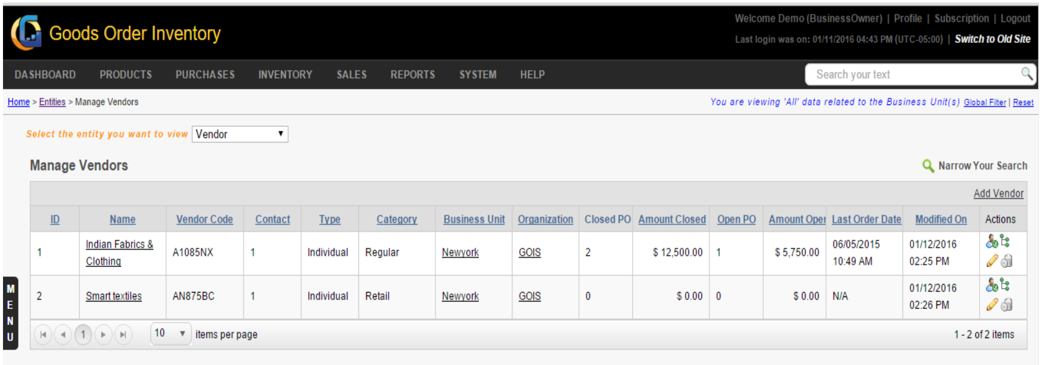
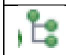


FIGURE 6.17.1

Field	Description
ID	System generated vendor ID.
Vendor Name	Name of the vendor.
Vendor Code	User defined vendor code.
Type	Vendor type (user defined).
Category	Vendor category (user defined).

Business Unit	Name of the business unit with which the vendor is associated.
Organization	Name of an organization with which the vendor is associated.
Closed PO	Number of closed PO against a vendor.
Amount Closed	Total amount of all closed PO against a vendor.
Open PO	Number of open PO against a vendor.
Amount Opened	Total amount of all open PO against a vendor.
Contacts	Total count of vendor contacts.
Last Order Date	Last date on which the order has been received from a vendor.
Modified On	Date of modification.
	Click on this icon to edit a vendor detail.
	Click on this icon to delete a vendor.
	Click this icon to add a vendor contact.
	Click this icon to add a billing address.

Add Vendor

To add a new “Vendor”, User needs to navigate to the “Entities” section that can be found under the “System” dropdown menu. The navigation of the menu is shown below along with the snapshots.

Steps to Add Vendor:
(Home>>System>>Entities>>Vendor>>Add Vendor**)**

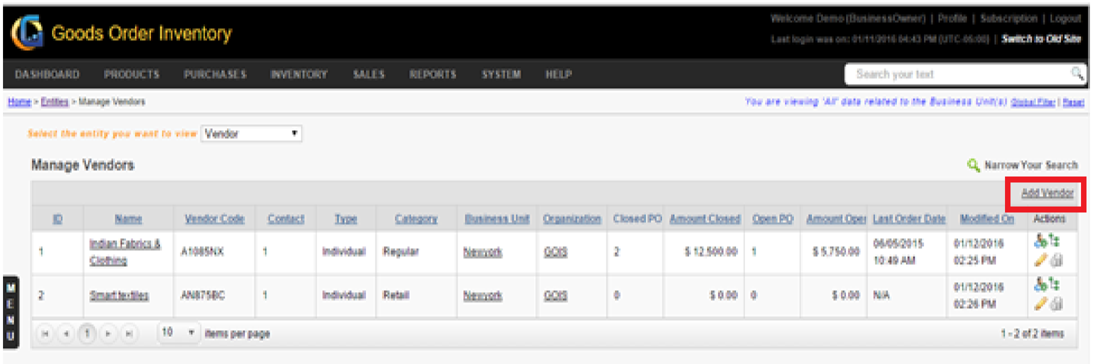


FIGURE 6.17.2

When you will click on the link marked on the above snapshot, a new window will appear in which you have to fill all details to add a new Vendor in the system. Snapshot and Steps to add organization is given below.

<u>**Steps to Add Vendor:**</u>

Step 1: Click on the Add Vendor link on the right corner as marked in **(Figure 6.17.2)**.

Step 2: After clicking on the button, a new window will appear, fill the vendor details about the new vendor in the given fields. A Snapshot of the window is shown below.

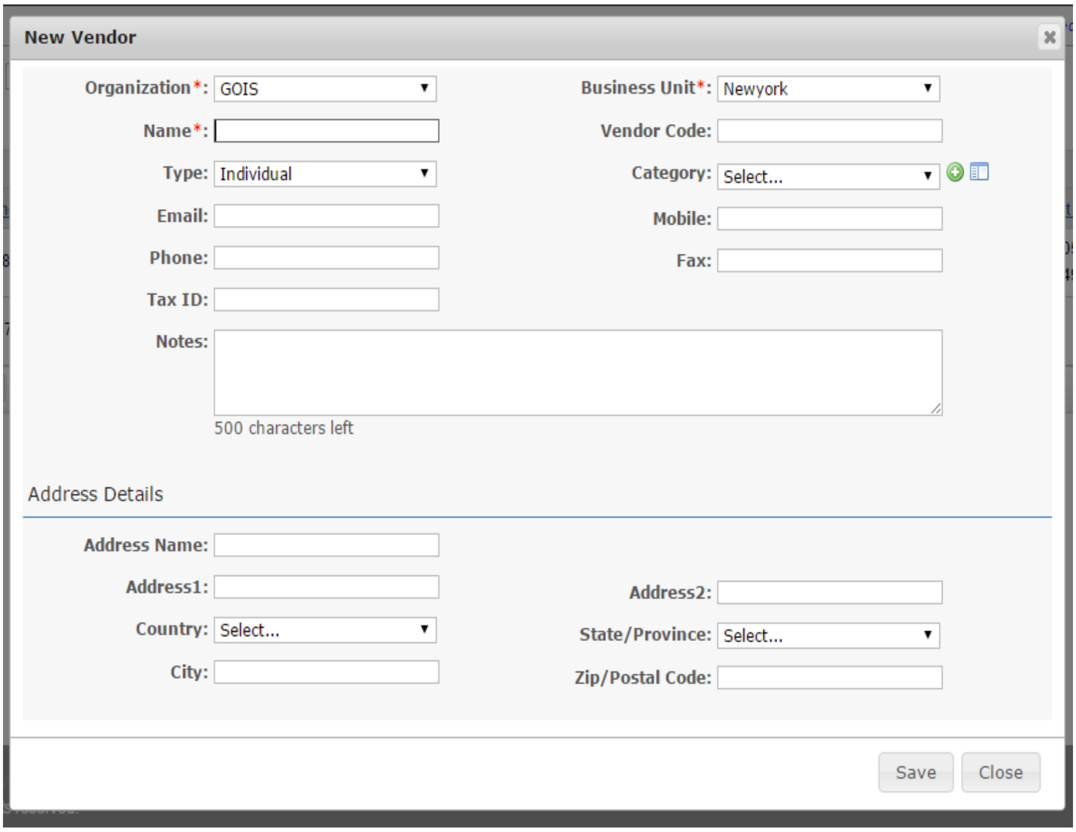


FIGURE 6.17.3

Add Vendor (Vendor Details)	
Field	Description
Name	Name of a vendor.
Vendor Code	User defined vendor code.
Vendor Category	User defined category of a vendor.
Vendor Type	Type of a vendor.
Email	Email address of a vendor.
Mobile	Mobile number of a vendor.
Phone	Phone number of a vendor.
Fax	Fax number of a vendor.
Tax ID	Tax ID for a vendor.
Note	Additional note for a vendor.
Organization	Name of the organization the vendor is associated.
Business Unit	Name of the Business unit the vendor is associated.
Address Details	Provide necessary information under address details of a vendor.
	Click to add a new vendor category.

	Click to see the list of all vendor categories.

Note: After filling all the details, the user must click on the save button to save the changes made to add new Vendor.

Edit Vendor

To edit the details for the existing Vendor, user needs to click on the icon marked in the below given snapshot.

Steps to Edit Vendor details:

Step 1: User has to navigate to the Manage Vendor window, and then click on the pencil icon marked on the given snapshot.

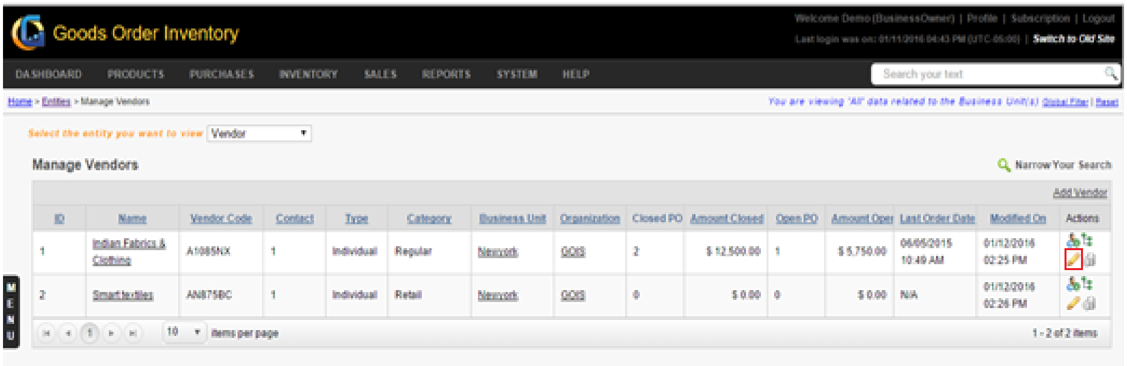


FIGURE 6.17.4

Step 2: After clicking on the icon an "Edit Vendor" details form will be displayed. A snapshot of the window is shown below.

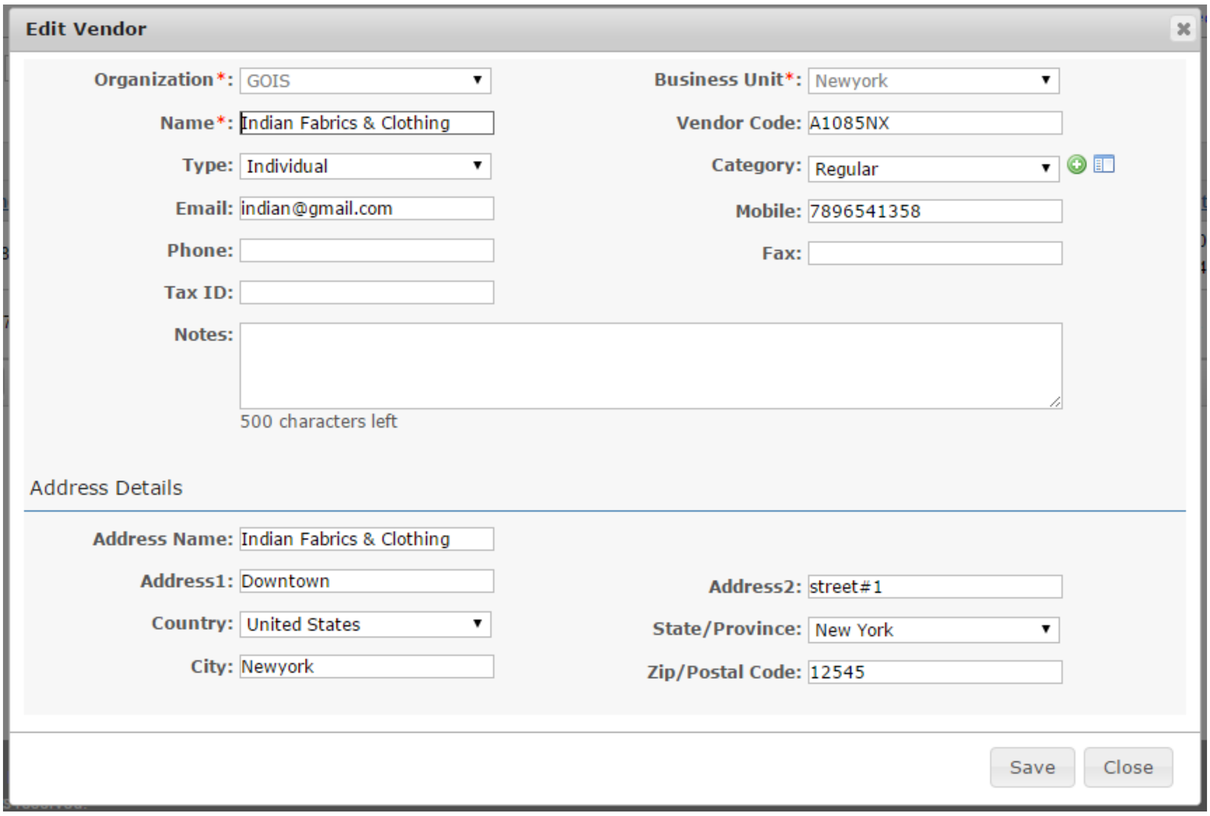


FIGURE 6.17.5

Step 3: Edit the desired field information that needs to be changed.

Step 4: Click on 'Save' button to save the changes made.

Delete Vendor

To delete an existing Vendor, user needs to click on the delete icon marked in the given snapshot.

Steps to Delete Vendor:

Step 1: To delete a Vendor, you need to navigate through the Manage Vendors window.

Step 2: Then you have to click on desired delete icon for the specific Vendor to be deleted. Refer snapshot. **(Figure 6.17.6)**

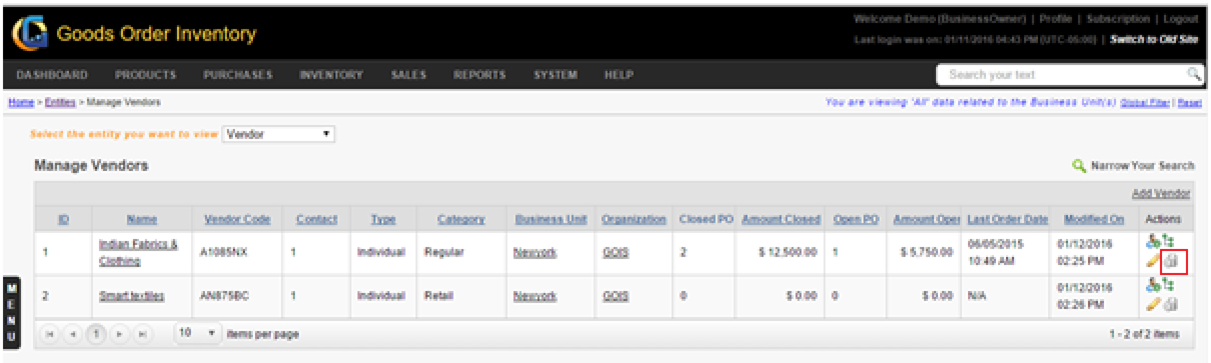


FIGURE 6.17.6

Step 3: After clicking on the icon an alert popup will be shown, asking for the surety of the user to delete the given vendor. Click on Ok button to delete.

Vendor Details

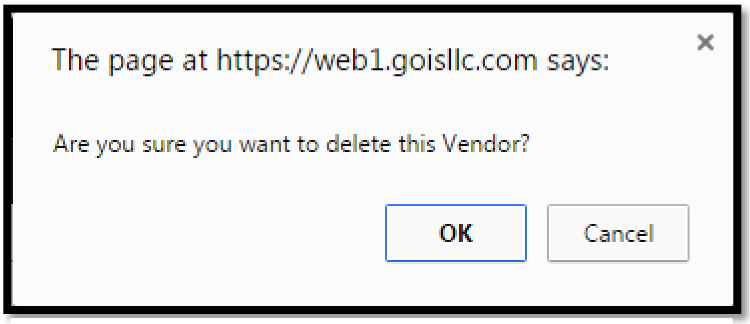


FIGURE 6.17.7

To view vendor details, user needs to click on the name of the Vendor as shown in the snapshot **(Figure 6.17.10)**.

Steps to view Vendor details:

Step 1: To view Vendor details, you need to navigate through the Manage Vendors window.

Step 2: Then you have to click on desired vendor name; for which you wish to check the details.

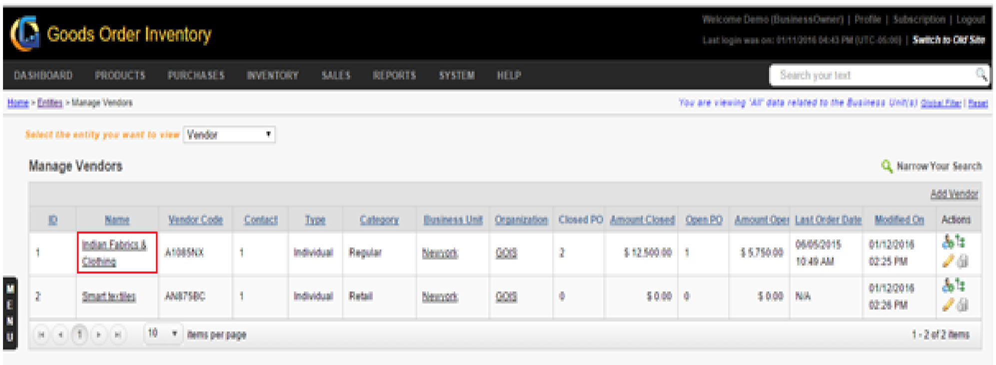


FIGURE 6.17.8

Step 3: After clicking on the desired vendor name, user gets redirected to another page showing all the relevant details about the specific vendor. The page has been shown in fragments for detailed understanding in the snapshots.

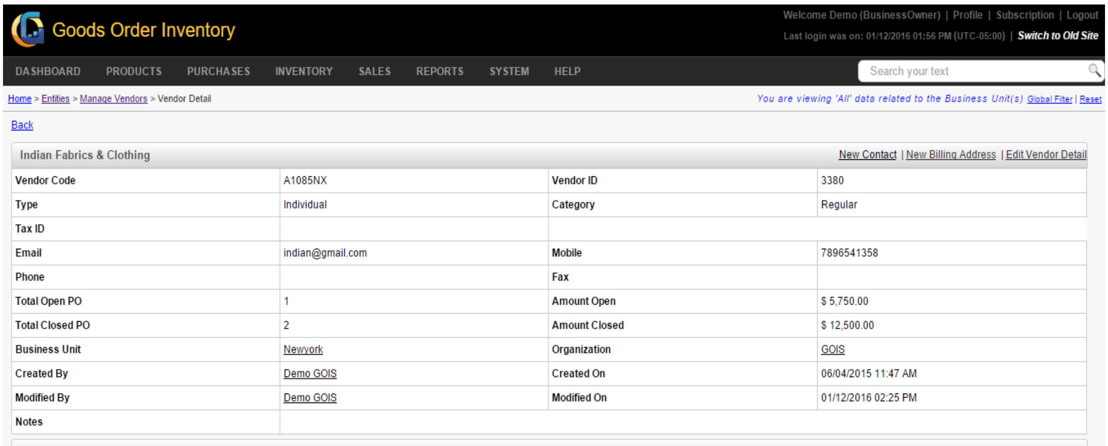


FIGURE 6.17.9

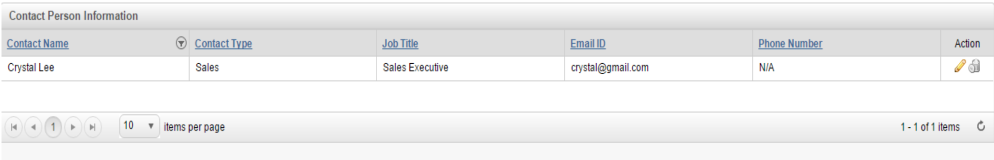


FIGURE 6.17.10

Contact Person Information	
Field	Description
Job Title	Job title of the vendor's contact person.
Name	Name of the contact person.
Total PO Handled	Count of total purchase order handled.
Type	Type of the vendor contact person.
Phone	Phone number of the vendor contact person.
Mobile	Mobile number of the vendor contact person.
Description	Description –if any.

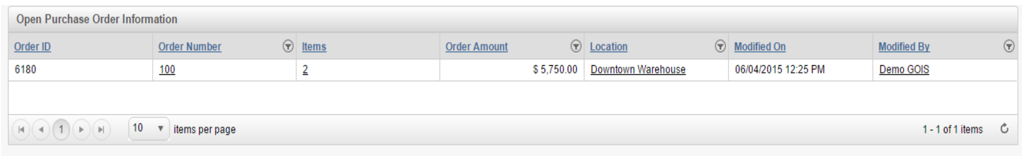


FIGURE 6.17.11

Open Purchase Order Information	
Field	**Description**
Order ID	Unique ID of the order number (system generated).
Order Number	Unique order number – as per the format defined by business owner.
Items	Number of items in an order.
Order Amount	Total amount of the order.
Location	Location for which the order has been raised.
Modified On	Date of modification.
Modified By	Name of the person who modified the order.

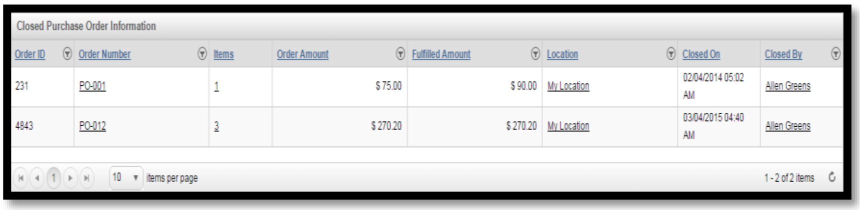


FIGURE 6.17.12

Closed Purchase order Information	
Field	**Description**
Order ID	Unique order ID of the closed Purchase Order.
Order Number	Unique Order Number of the Closed PO.
Items	Number of items in the PO.
Order Amount	Total order Amount.
Fulfilled Amount	Total Fulfilled amount.
Location	Location for which the purchased order has been raised.
Closed On	Date of Closing of PO.
Closed By	Name of the person who closed the PO.

Chapter 18: Product Unit

In GOIS, we have provided the facility through which you can add your own units and define their unit conversion factors. Any unit added by the user are referred as User-Defined units. These units can also be used while adding Purchase Orders and Sales Orders. However, GOIS-PRO does also provide a set of predefined units called system defined units which can also be used with the products.

Unit Measurement Systems

In GOIS following **system of measurements** for units are available

- Metric
- English

Unit Categories

All the standard system defined units available in GOIS has been classified in the following categories

- Mass
- Volume
- Length
- Area
- Quantity
- Other

System Defined Units

At present we have defined some commonly used units for both Metric and English system of measurements. System defined units cannot be edited by users.

The various system defined units present in GOIS according to unit category as given below.

Note: Symbol ‘S’ shows the system defined units and symbol ‘U’ shows the user defined units.

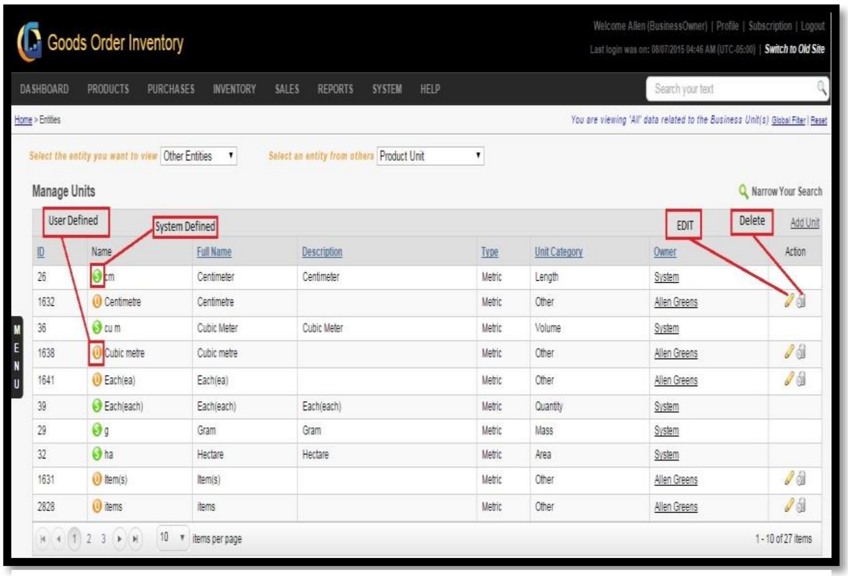


FIGURE 6.18.1

User Defined Units

As Goods Order Inventory System allows users to add their own measurement units, so any unit added by the user (business owner) is regarded as User Defined unit into the system. The process of adding user defined units can be explained using an example scenario. The example given below is just one of the many possible scenarios. The users are advised to regard this example, as a reference point and then implement their own scenario accordingly; as per their business requirement.

Suppose a business owner is maintaining inventory for a product say ‘Product 1’. The business owner purchases Product 1 from vendor in large bags and then sells the Product in packets and Boxes.

So, for such a scenario, suppose the business owner sells the Product (Product 1) in 5 types of packets and three types of boxes which are as given below

Packets

- P1 (Packet Type 1) Smallest Packet
- P2 (Packet Type 2) Small Packet
- P3 (Packet Type 3) Medium Packet
- P4 (Packet Type 4) Large Packet
- P5 (Packet Type 5) Largest Packet

Boxes

- Box1 (Box Type 1) Small Box
- Box2 (Box Type 2) Medium Box
- Box3 (Box Type 3) Large Box

And, suppose the business owner, acquires the product (Product 1) from vendor in following types of bags

Bags

- Bag1 (Bag Type 1) Small Bag
- Bag2 (Bag Type 2) Medium Bag
- Bag3 (Bag Type 3) Large Bag

So, now we have a logical or conceptual idea about the units required for the above scenario.
Now, we can see how to add a unit using the Add Unit option from Units page in Entities section.

Adding a New Measurement Unit

(Home>>System>>Entities>>Other Entities>>Product Unit>>Add Unit**)**

Overview: To define some quantity for a product, we need some measurement unit on which a product quantity can be measured. User is allowed to create a new measurement unit for their Business as per the requirement. However system will provide you some standard predefined set of English and Metric Measurement Units, but you can also create on your own as desired. For Example: Packet, Bag, Box, etc.

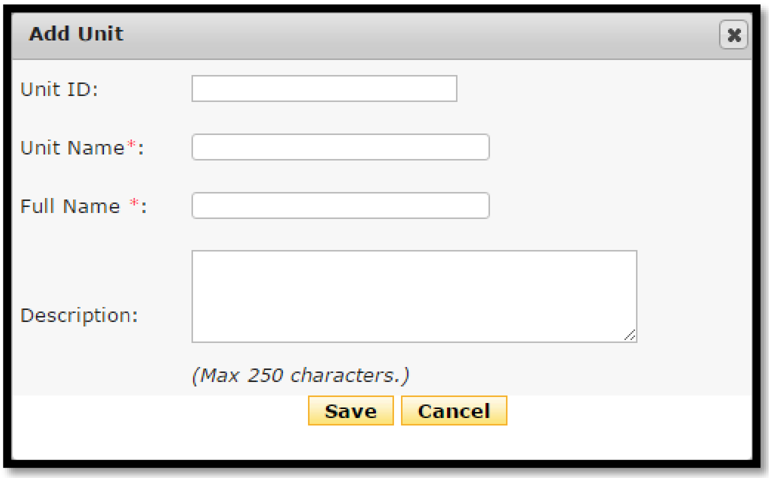


FIGURE 6.18.2

Add Unit	
Field	Description
Unit ID	The Unit ID needn't be entered. It is **generated automatically** by the system.
Unit Name	In this field, the **unit's short name** can be entered. For example, **P1** can be entered for **Packet Type 1**.
Full Name	Here, the **unit's full name** should be entered. For example: **Packet Type 1** can be entered as the **unit's full name**.
Description	Here, you can enter **some description of the unit**; like in the screen above we have entered **Smallest Packet** as the description.

After providing all the information user need to click on either save button to fix the changes or cancel to ignore it.

Now, the units have been defined as per the requirements of the user (business owner). These units can be used for the products and we can define product specific conversion factors or quantities.

Editing a User Defined Measurement Unit

(Home>>System>>Entities>>Other Entities>>Product Unit>>Action (Edit)**)**

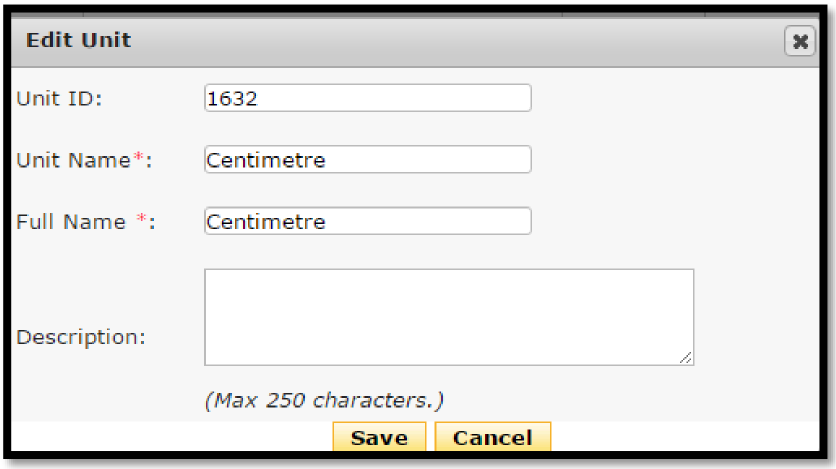


FIGURE 6.18.3

After changing or editing the information user need to click on either Save or Cancel button to fix or ignore the changes respectively.

Deleting a user Defined Unit

Home< System < Entities < Other Entities < Product Unit<<Action (Delete)

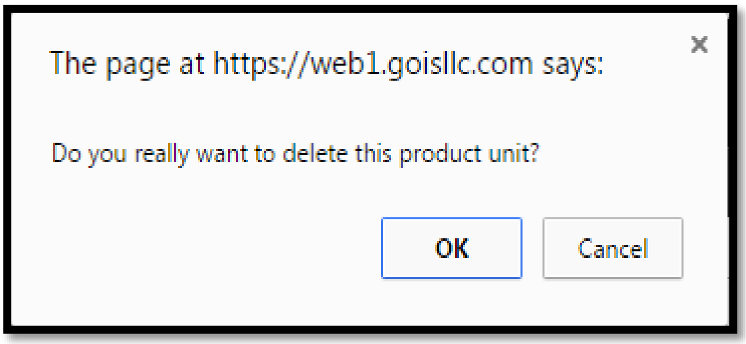


FIGURE 6.18.4

On clicking to “Delete” icon system will prompt a confirmation message whether or not to delete the user Defined units. On choosing to “Yes” button the unit will be deleted from the system.

Chapter 19: Product Category

In GOIS we have provided the facility to create the category and add product into it. This could provide the freedom of adding similar product under a same name to the user.

To Manage Product Category:

(Home>>System>>Entities>>Other Entities>>Product Category)

1. Move the mouse pointer to the "System" Section on the Menu Bar, a drop down menu will be displayed, click on the "Entities".
2. By Default, the user will be redirected to the page containing the list of organizations.
3. Click on the dropdown box and select "Other Entities".
4. Another drop down box will get appear, click on the dropdown box and select "Product Category".
5. A list of Product categories will be displayed of already added. **(Figure 6.19.1)**

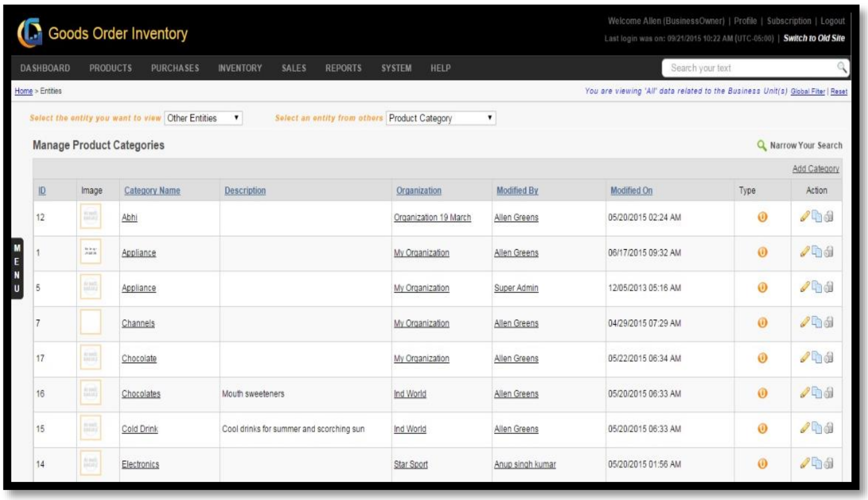


FIGURE 6.16.1

Manage Product Category	
Field	Description
ID	Unique ID of the Category
Image	Image of the Category
Category Name	Name of the Category
Description	Description
Organization	Name of the Organization, under which the category has been listed

Modified ON	Date of Modification
Modified By	Name of the Person who modified the Category
Type	Category Type
Action	Click to edit an existing category
Action	Click on this icon to copy the category
Action	Click to delete an existing category

Add Category

To add a new "Product Category", User needs to navigate to the "Entities" section that can be found under the "System" dropdown menu. The navigation of the menu is shown below along with the snapshots.

Steps to Add Category:

(Home>>System>>Entities>>Other Entities>>Product Category>>Add Category**)**

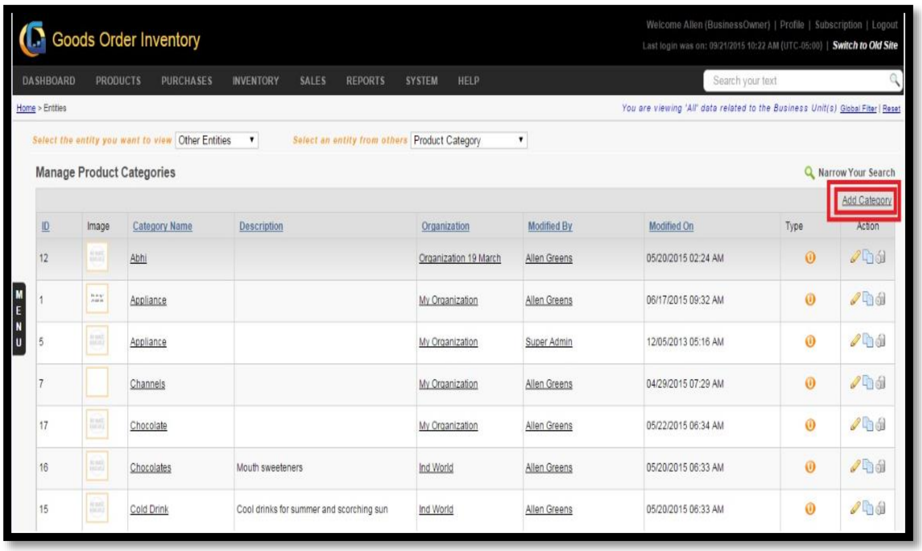


FIGURE 6.16.2

Steps to Add Category:

Step 1: Click on the Add Category link on the right corner as marked in the **(Figure 6.16.2)**.

Step 2: After clicking on the Link, a "Select Ownership" window will appear, asking to the user for the Organization to which the new category will be associated. A Snapshot of the Window is shown below.

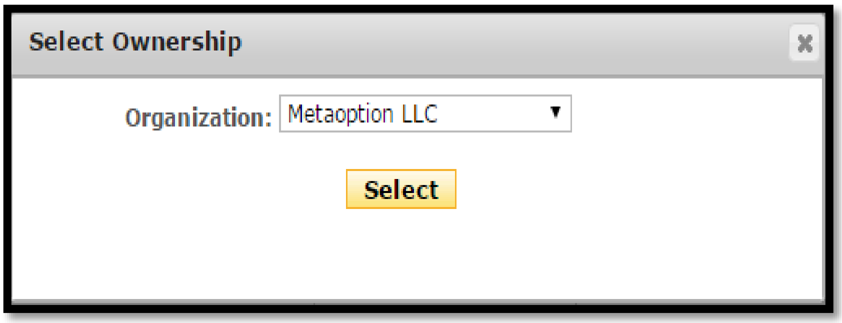


FIGURE 6.16.3

Step 3: Click on the dropdown and select the Organization you want the new category to associate with.

Step 4: After selecting the Organization click on the select button.

Step 5: User will be redirected to another pop-up window.

FIGURE 6.16.4

Step 6: User has to provide the name of the category, Description about the category and the image of the category.

Step 7: After filling the mandatory fields, user has to click on the Save button. Category will get save.

Category Details

To view a category detail, user needs to click on the name of the category as shown in the snapshot **(Figure 6.17.5)**.

Steps to view category details:

Step 1: To view category details, you need to navigate through the Manage Product Categories window.

Step 2: Then you have to click on desired category name for which you want to check the details.

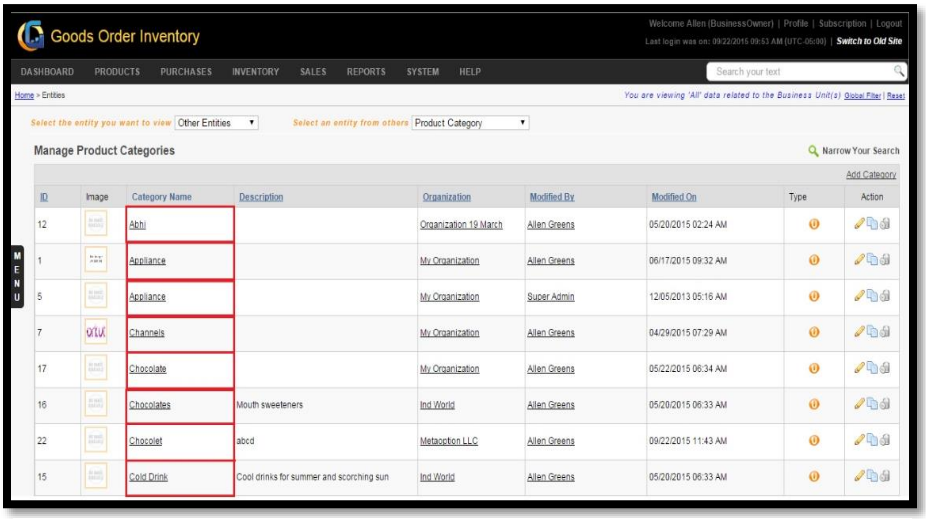


FIGURE 6.17.5

Step 3: After clicking on the desired category name, user gets redirected to another page showing all the relevant details about the specific category. The page has been shown in fragments for detailed understanding in given snapshots.

Part 7: Subscription

This section of document will cover the details that GOIS provides related to the subscription. Moving forward in this section, you would be able to understand how a user or business owner can check the details about their user profile, payments, invoices, registered cards, add GOIS wallet/account balance, apply coupons & discounts, payment history, failed payments, important notifications, raise case, etc. This section will cover all the chapters given below.

Chapter 19: "User Profile"; this chapter provides the general information related to user profile and basic details.

Chapter 20: "Subscription"; this chapter provides detailed information related to Active Subscription, Subscription History, and Change Subscription.

Chapter 21: "Payment"; this chapter helps you to understand how user can get the information related to the Account Balance, Discounts, Registered Card, Invoice, Payment History, and Failed Payment.

Chapter 22: "Notification"; shows all the notifications received from the GOIS-PRO system to the GOIS user against different activities and actions to be performed or being performed into the system.

Chapter 23: "Case"; allows a user to raise a ticket against any query to GOIS support team directly.

Chapter 20: User Profile

To view the Personal Information about the user, you need to navigate to the subscription section; the hyperlink can be found in the top right corner of the page. You have to click on the Subscription link and after clicking, system will be navigated to Owner Subscription screen. Refer snapshot in (Figure: 7.20.1)

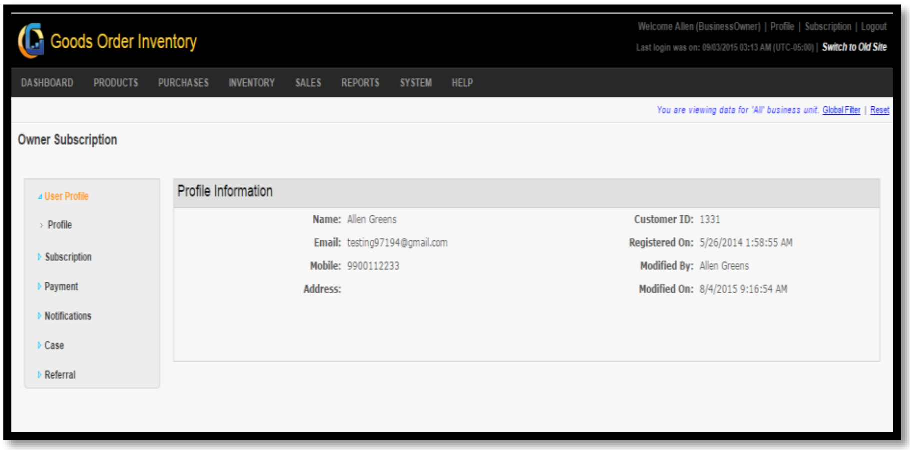


FIGURE 7.20.1

User Profile	
Field	Description
Name	Name of the user.
Email	Email id of the user.
Customer ID	Unique customer ID of the user.
Registered On	Date of account registration.
Mobile	Mobile number
Modified By	Name of person who has updated the information.
Modified On	Date-Time of information modification.
Address	Address of the user.

This webpage provides all the basic details of the user that has been saved into the GOIS database for any communication.

Chapter 21: Subscription

This section of document will describe how user can see the information related to the current/active subscription, history of subscription and how to change the current subscription/plan.

Active subscription

To see active subscription detail:

(Home>>Subscription>>Owner Subscription>>Subscription>>Active Subscription)

1. Move the mouse pointer to the "Subscription" link on the top right corner of the page.
2. User will be redirected to another page displaying the user profile details under owner subscription screen.
3. Click on the Subscription tab that can be found under the left vertical menu grid.
4. A sub menu will slide down; click on the "Active subscription" tab, current subscription details will be displayed by the system on the same page. Snapshot of the page is shown in the **(Figure 7.21.1)**

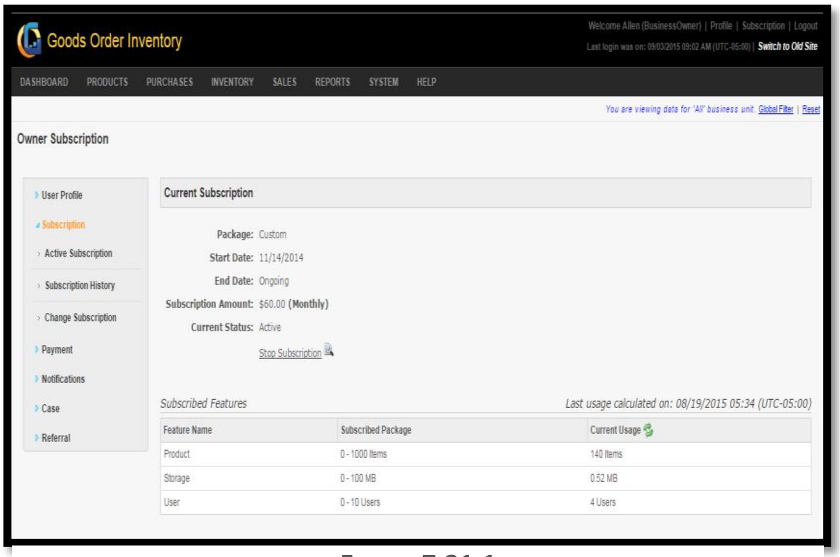


FIGURE 7.21.1

Current Subscription	
Field	Description
Package	Type of package subscribed.
Start Date	Start date of the subscription.
End Date	End Date of the subscription.

Subscription Amount	Total monthly amount of on-going subscription.
Current Status	Current status of account/subscription.
Stop Subscription	Click to stop your on-going subscription.
Feature Name	Name of the parameter on which the subscription price will be calculated.
Subscribed Package	Type of the package.
Current Usage	Current usage from the allocated limit. Click on green icon to refresh the current usage.
Product	Total number of products - limit (allocated and used)
Storage	Total storage capacity – limit (allocated and used)
Users	Total number of users – limit (allocated and used)

Subscription History:

To see the Subscription History

(Home>>Subscription>>Owner Subscription>>Subscription>>Subscription History**)**

1. Move the mouse pointer to the “Subscription” button on the top right corner of the page.
2. User will be redirected to another page displaying the user profile details under owner subscription screen.
3. Click on the Subscription tab that can be found in the left vertical menu grid.
4. A sub menu will slide down; click on the “Subscription History” tab, Subscription History detail will be displayed by the system on the same page. Snapshot of the page is shown in the **(Figure 7.21.2)**

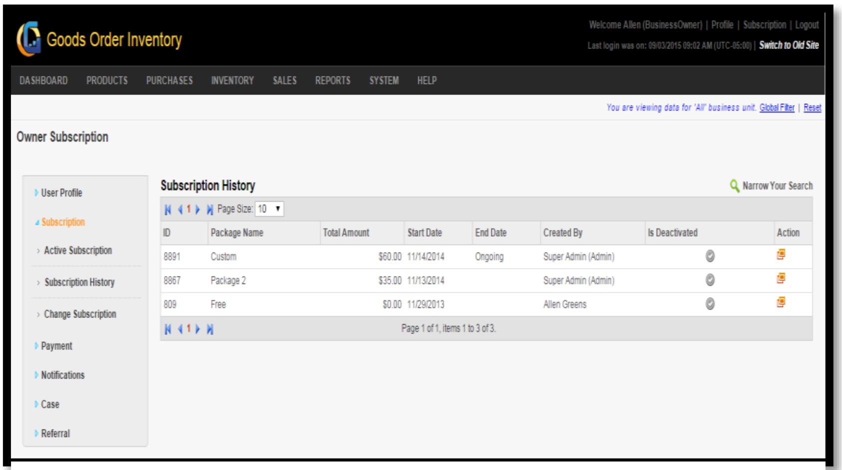


FIGURE 7.21.2

Subscription History	
Field	Description
ID	System generated ID.
Package Name	Name of the package.
Total Amount	Monthly price of a package/subscription.
Start Date	Start date of the subscription.
End Date	End date of the subscription.
Created By	Name of the user who has subscribed the given package.
Is Deactivated	Current status of the subscription.
Action	On clicking to this icon, user will be redirected to another page showing the details about the specific subscription **(Figure 7.21.3).**

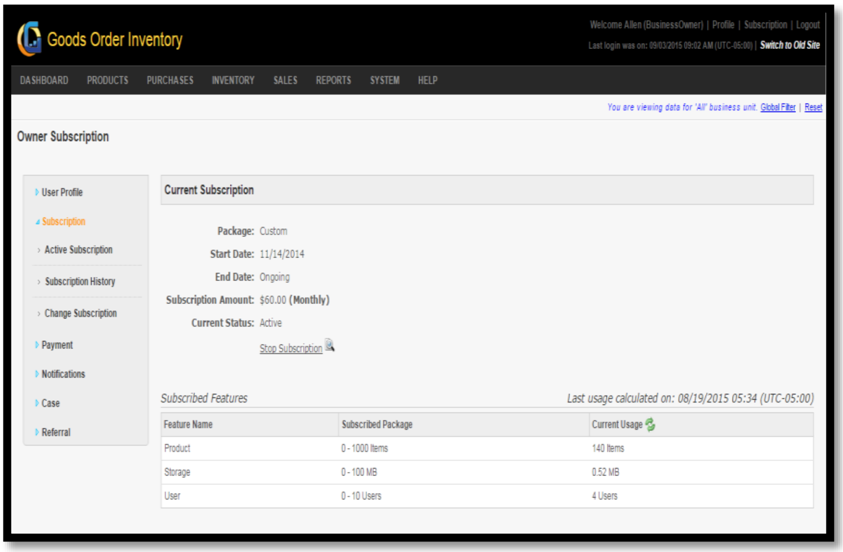


FIGURE 7.21.3

Change Subscription:

To change the current Subscription

(Home>>Subscription>>Owner Subscription>>Subscription>> Change Subscription**)**

1. Move the mouse pointer to the “Subscription” button on the top right corner of the page.
2. User will be redirected to another page displaying the user profile details under owner subscription screen.
3. Click on the Subscription tab that can be found in the left vertical menu grid.
4. A sub menu will slide down; click on the “Change Subscription” tab; user will be redirected to another page providing different subscription plans. Snapshot of the page is shown in the **(Figure 7.21.4)**
5. User can customize the plan according to their need by selecting the need for No of Users, Products/Items/SKU# to be added and the storage capacity they want. User can select these from the provided bandwidth capacity.
6. Price will be calculated according to the parameter selected automatically.
7. User needs to click on continue button for payment options.

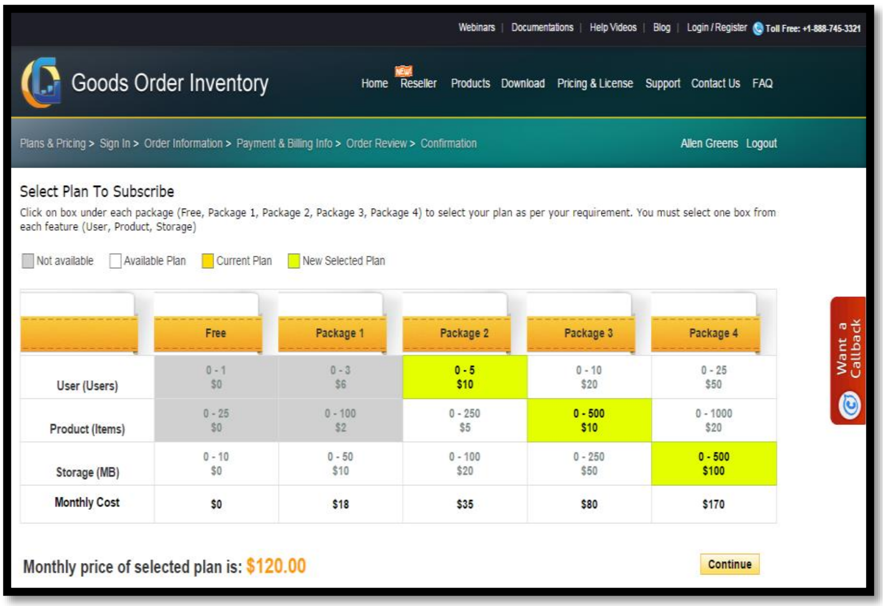


FIGURE 7.21.4

Chapter 22: Payment

This section provides you the details related to the payment made against GOIS-Pro subscription, account balance, pending invoices, registered cards, coupons, etc.

Account Balance:

To see account balance details:

(Home>>Subscription>>Owner Subscription>> Payment>>Account Balance**)**

1. Move the mouse pointer to the "Subscription" button on the top right corner of the page.
2. User will be redirected to another page displaying the user profile details under owner subscription screen.
3. Click on the "Payment" tab that can be found under the left vertical menu.
4. A sub menu will slide down; click on the "Account Balance" tab; detail related to the Account Balance will be displayed by the system on the same page. Snapshot of the page is shown in **(Figure 7.22.1)**

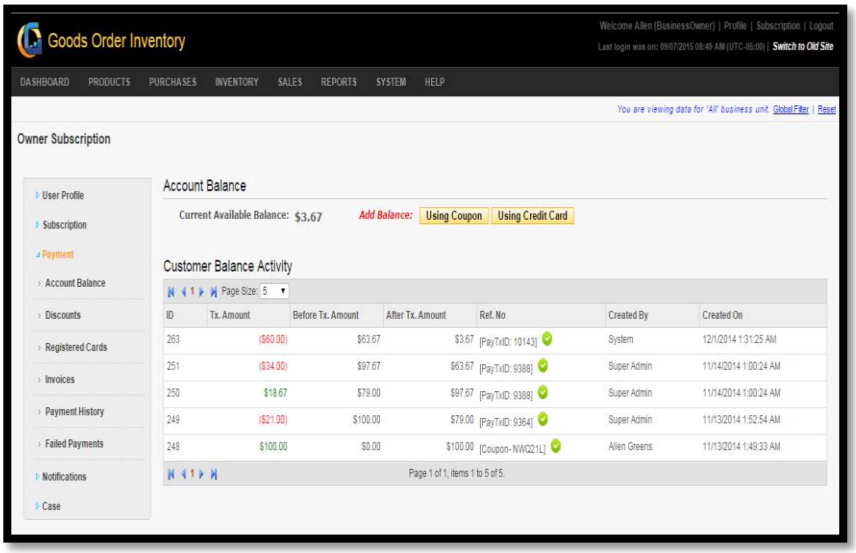


FIGURE 7.22.1

Note: User can also add the account balance/wallet balance to make the future payments by using the given options as Add Balance using Coupon or Add Balance using Credit Card.

Account Balance	
Field	Description
ID	System generated transaction ID.
Tx.Amount	Transaction amount.
Before Tx. Amount	Total amount/account balance before the transaction.
After Tx. Amount	Total amount/account balance after transaction.
Ref No	Reference number for the transaction.
Created By	The user who created the transaction.
Created On	Date and time when the transaction was made.
Current Available Balance	Total account balance available for subscription payment.
Add Balance	To add the GOIS account balance.
Using Coupon	Add wallet balance using coupon code.
Using Credit Card	Add wallet balance using credit card.

Discounts

User can redeem the discount coupon and also see the list of availed discounts by using the discount section of GOIS.

To redeem the discount coupon and see the discount activity:

(Home>>Subscription>>Owner Subscription>Payment>>Discount**)**

1. Move the mouse pointer to the "Subscription" button on the top right corner of the page.
2. User will be redirected to another page displaying the user profile details.
3. Click on the "Payment" tab that can be found in the side menu.
4. A sub menu will slide down; click on the "Discount" tab, detail related to Discount will be displayed by the system, if user has availed any discount. Snapshot of the page is shown in the **(Figure 7.22.2)**
5. User can also provide the coupon code and redeem the discount – if applicable.

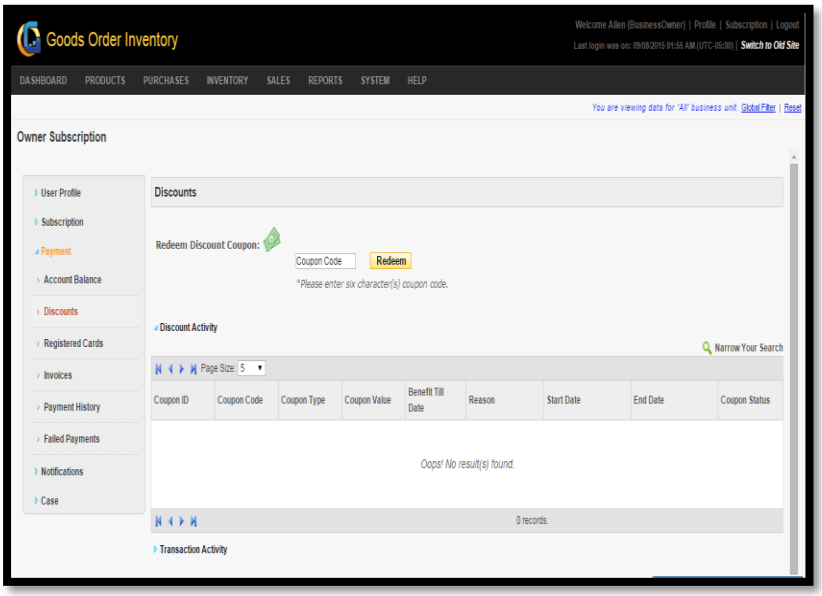


FIGURE 7.22.2

Discount	
Field	Description
Coupon ID	System generated of unique id of the coupon transaction.
Coupon Code	Coupon Code.
Coupon Type	Type of the coupon.
Coupon Value	Total value of the coupon.
Benefit Till Date	Benefit earned from the coupon till date.
Reason	Reason for discount.
Start Date	Start date of the coupon discount.
End Date	End date of the coupon discount.
Coupon Status	Current status of the coupon.
Coupon Code	Provide the coupon code in this textbox.
Redeem	Click on this button to redeem the coupon.

Registered Card

User can Register a new card or view/edit the details of the registered card by going through this section.

To add new card or to view details about saved cards:

(Home>>Subscription>>Owner Subscription>>Payment>>Registered Cards**)**

1. Move the mouse pointer to the "Subscription" button on the top right corner of the page.
2. User will be redirected to another page displaying the user profile details under owner subscription screen.
3. Click on the "Payment" tab that can be found in the side menu.
4. A sub menu will slide down; click on the "Registered Cards" tab; detail related to the registered cards will be displayed by the system; only if user has already saved the card. Snapshot of the page is shown in the **(Figure 7.22.3)**
5. User can also add new card by clicking on the hyperlink "Add Account". To add a new card, user need to provide all the necessary information related to the card, need to save it and mark it as default, so that the new card can be used for future payments. **(Figure 7.22.4)**

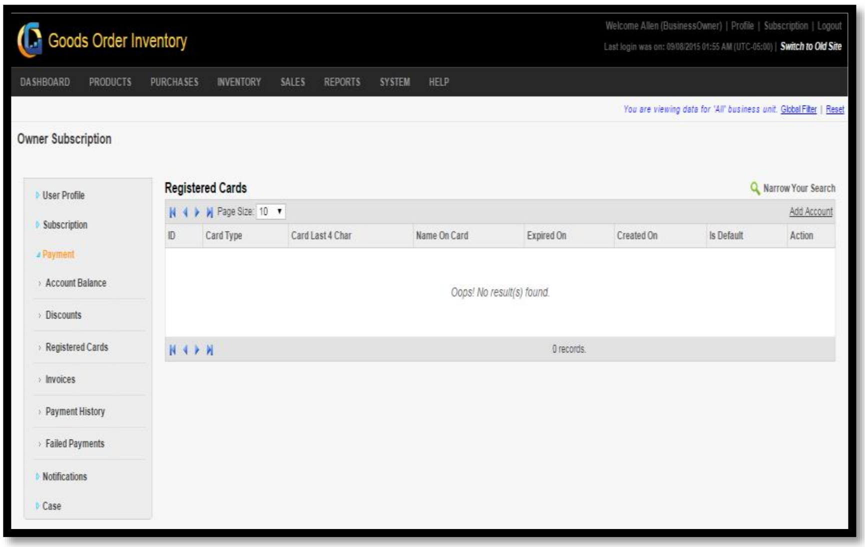


FIGURE 7.22.3

Registered Cards	
Field	Description
ID	Unique ID of card entry into the system – system generated.
Card Type	Type of the card as provided by the user.
Cards Last 4 Character	Last 4 digit of the card number.
Name on card	Name on the card.
Expired On	Expiry date of the card.

Created On	Date on which the card has been registered into the system.
Is Default	To make a particular card as default for payment – green icon shows the card is active and will be used for future payments.
Action	To view and edit the existing card information.

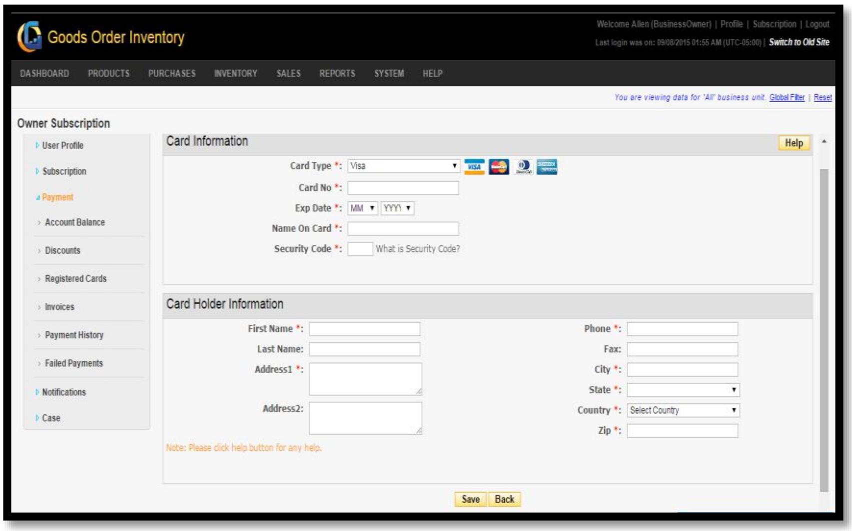


FIGURE 7.22.4

Card and Card Holder Information	
Field	**Description**
Card Type	User needs to provide the type of the card.
Card No	Provide the card number.
Exp Date	Expiry date of the card.
Name on Card	Name written on the card.
Security Code	CVV/Security code of the card, click on the hyperlink adjecent to the textbox to know more about it.
First Name	First name of the card holder.
Last Name	Last name of the card holder.
Address 1	Address of the card holder.
Address 2	Address of the card holder (optional).
Phone	Phone number of the card holder.
Fax	Fax number.
City	City of residence.
State	State of residence.
Country	Country of residence.
Zip	Zip code of address.

Invoices

To view the list of invoices (paid/unpaid) and their details user need to navigate to the invoice section.

To view the list Invoices and their details:

(Home>>Subscription>>Owner Subscription>>Payment>>Invoices**)**

1. Move the mouse pointer to the "Subscription" button on the top right corner of the page.
2. User will be redirected to another page displaying the user profile details under owner subscription screen.
3. Click on the "Payment" tab that can be found in the side menu.
4. A sub menu will slide down; click on the "Invoices" tab; list of invoice with their basic details will be shown, only if the invoice has been generated before. Snapshot of the page is shown in **(Figure 7.22.5)**
5. User can also see all the details related to Invoice by clicking on the Action icon adjacent to the specific Invoice. **(Figure 7.22.6)**

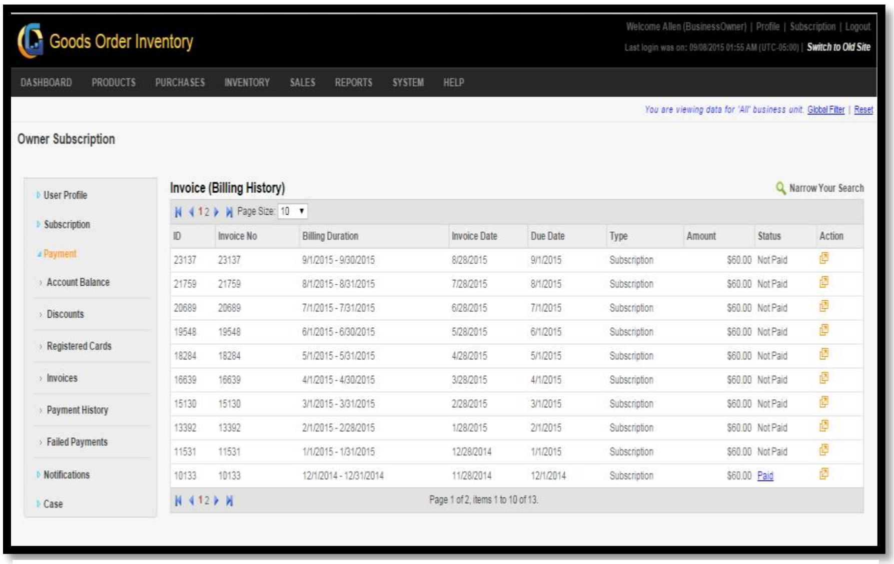


FIGURE 7.22.5

Invoice Billing History	
Field	Description
ID	System generated unique ID against an invoice entry into the system.
Invoice No	Unique number of the Invoice.
Billing Duration	Duration for which the invoice has been generated.
Invoice Date	Date of Invoice generation.
Due Date	Due date of an invoice before the payment is to be made.
Type	Type of Invoice.
Amount	Total amount of the invoice.
Status	Current Status of the Invoice.

Action	*************

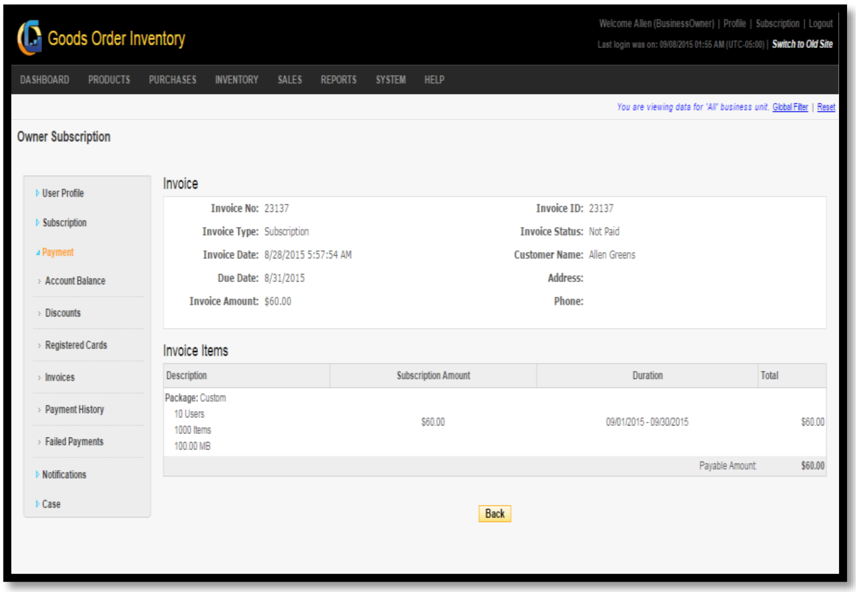


FIGURE 7.22.6

Invoice & Invoice Items	
Field	Description
Invoice No	Unique invoice number.
Invoice ID	Unique invoice ID –system generated.
Invoice Type	Type of the invoice.
Invoice Status	Current status of the invoice.
Invoice Date	Date on which the invoice has been generated.
Customer Name	Name of the Customer.
Due Date	Due date of the invoice.
Address	Address of the customer.
Invoice Amount	Amount to be paid.
Phone	Phone number of the customer.
Description	Detailed description about the on-going plan.
Subscription Amount	Subscription amount –per month.
Duration	Duration for which a particular invoice has been generated.
Total	Total amount of invoice.

Payment History

User can also view the details about all the payments made against the GOIS-Pro subscription (till date). GOIS keeps a log of the details related to each and every payment and the transactions made by the user/system against the GOIS subscription.

To view the list of Payments and their details:

(Home>>Subscription>>Owner Subscription>>Payment>>Payment History**)**

1. Move the mouse pointer to the "Subscription" button on the top right corner of the page.
2. User will be redirected to another page displaying the user profile details.
3. Click on the "Payment" tab that can be found in the side menu.
4. A sub menu will slide down; click on the "Payment History" tab; list of payments with their basic details will be displayed, only if the payment has been made before. Snapshot of the page is shown in the **(Figure 7.22.7)**
5. User can also see all the details related to payment by clicking on the Action icon adjacent to the specific Payment detail. **(Figure 7.22.8)**

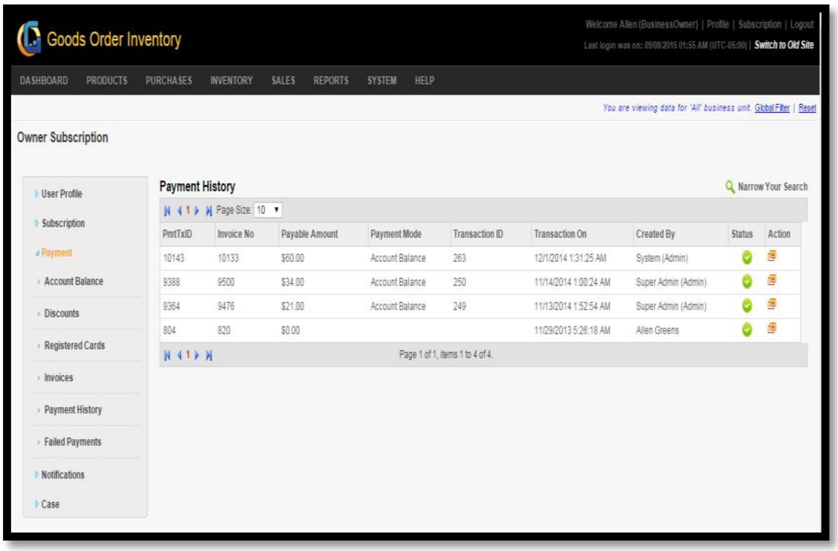


FIGURE 7.22.7

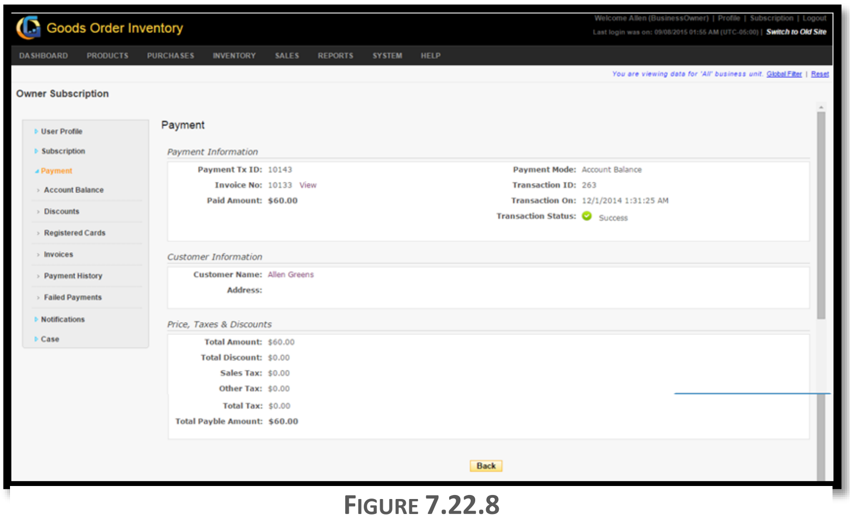


FIGURE 7.22.8

Failed Payment

GOIS pro also keep track of the payment that has been failed, to view the details about the failed payment; user may navigate to the failed payment section of GOIS Pro.

To view the list of Failed Payments and their details:

(Home>>Subscription>>Owner Subscription>>Payment>>Failed Payment**)**

1. Move the mouse pointer to the "Subscription" button on the top right corner of the page.
2. User will be redirected to another page displaying the user profile details.
3. Click on the "Payment" tab that can be found in the side menu.
4. A sub menu will slide down; click on the "Failed Payments" tab; list of failed payments with their basic details will be displayed, only if a payment has been failed before. Snapshot of the page is shown in the **(Figure 7.22.9)**

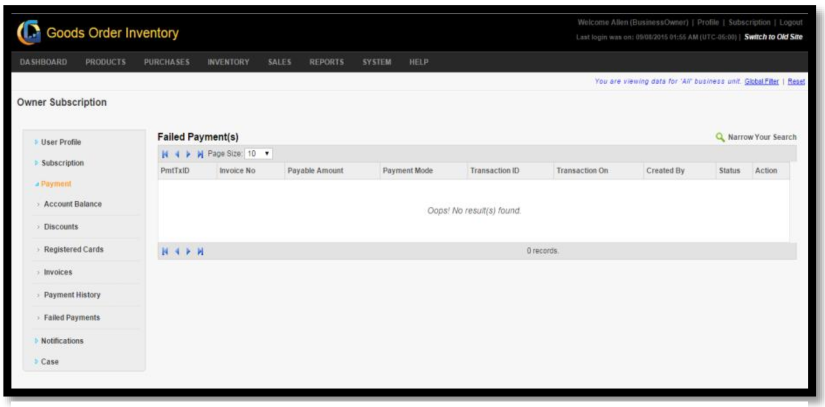


FIGURE 7.22.10

Chapter 23: Case

GOIS provides a direct support and assistance system; user can add case with the details about the issues and it directly goes to our live support team. Once the case will be resolved, the status of the case will be modified as close by the support team and also you will get a notification for the same.