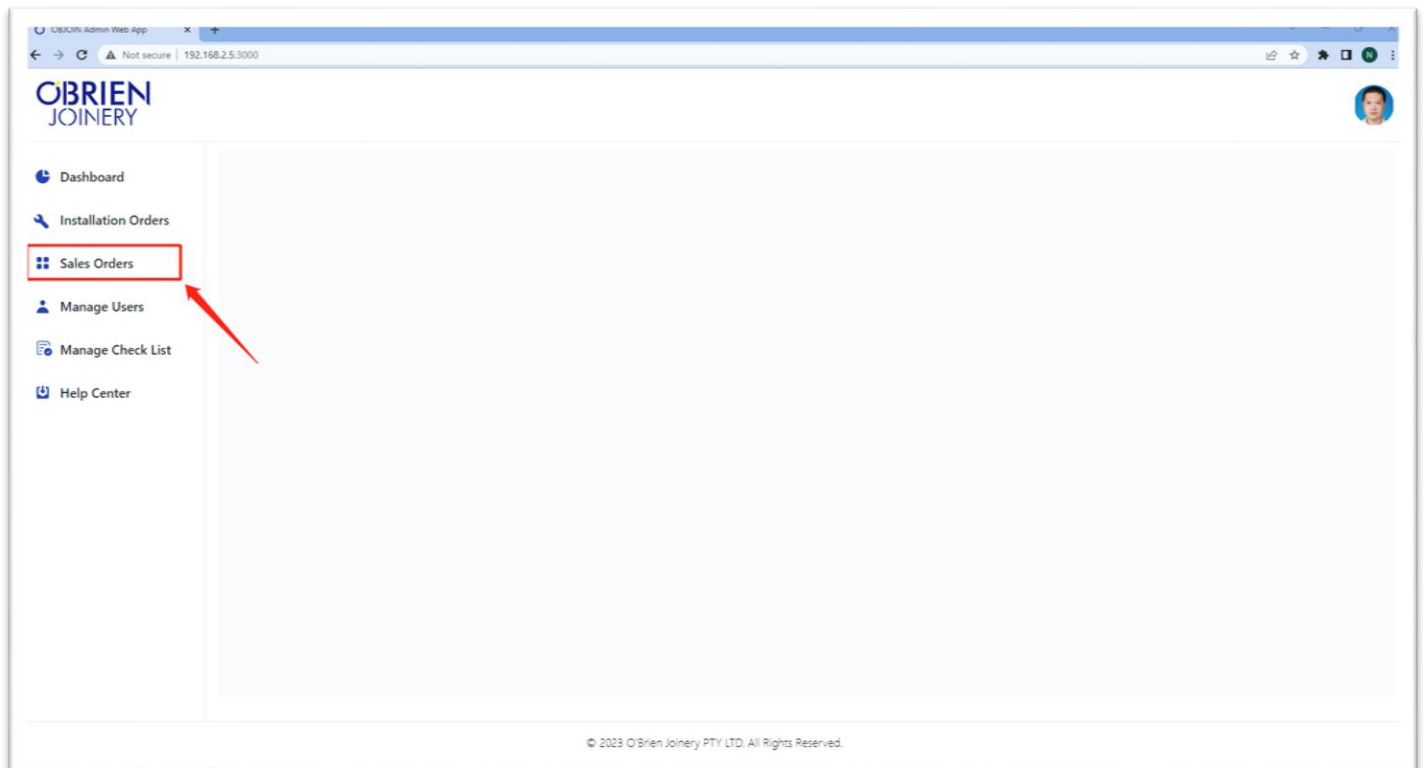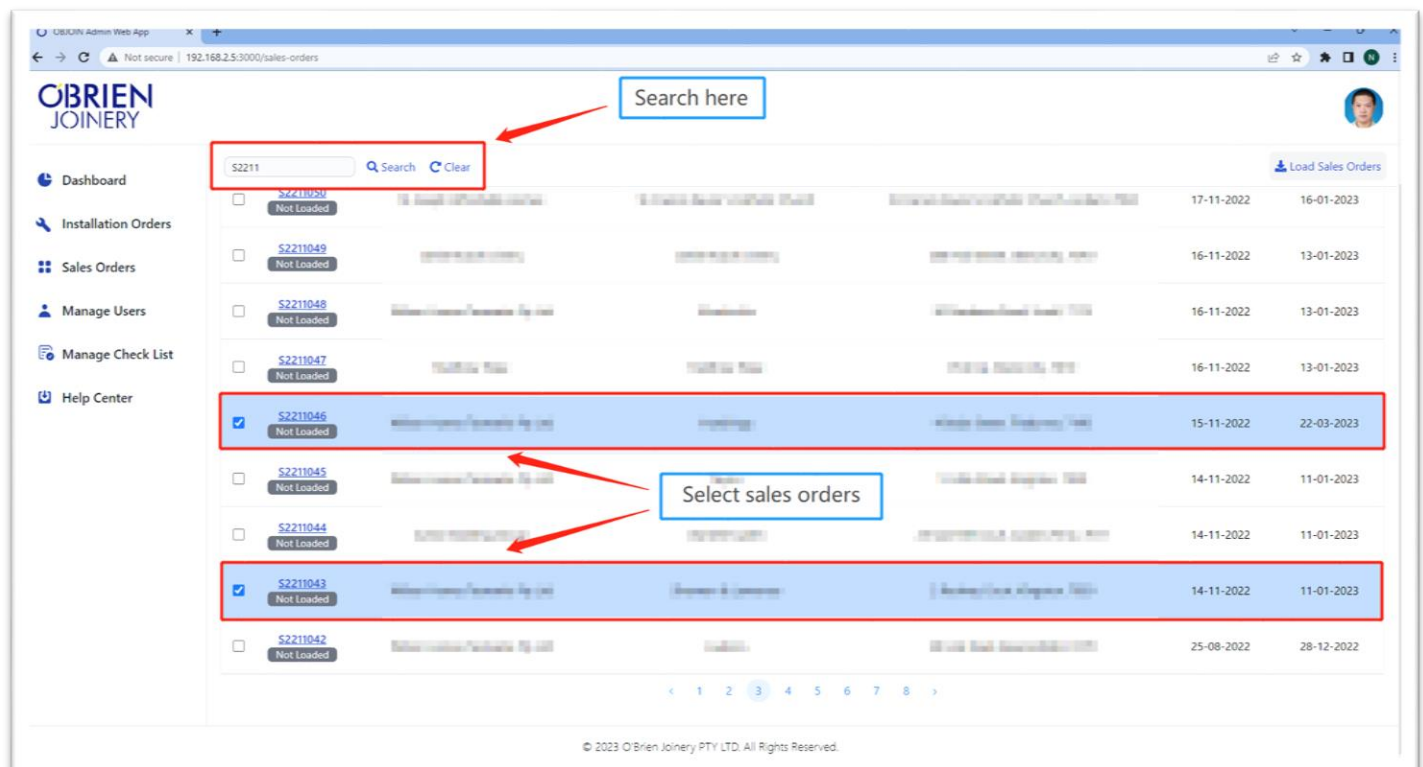# 1. Load Sales Orders

1.1 Login to the app and click Sales Orders in the menu bar

1.2 Search and select sales orders

1.3 Click the Load Sales Order button, and then there will be a success or failure notice in the top right corner.

1.4 Click on the blue Sales Order Number with underline, will show Sales Order Detail information on the right.

1.5 Click on the pdf file name will open the PDF file in a new tab.
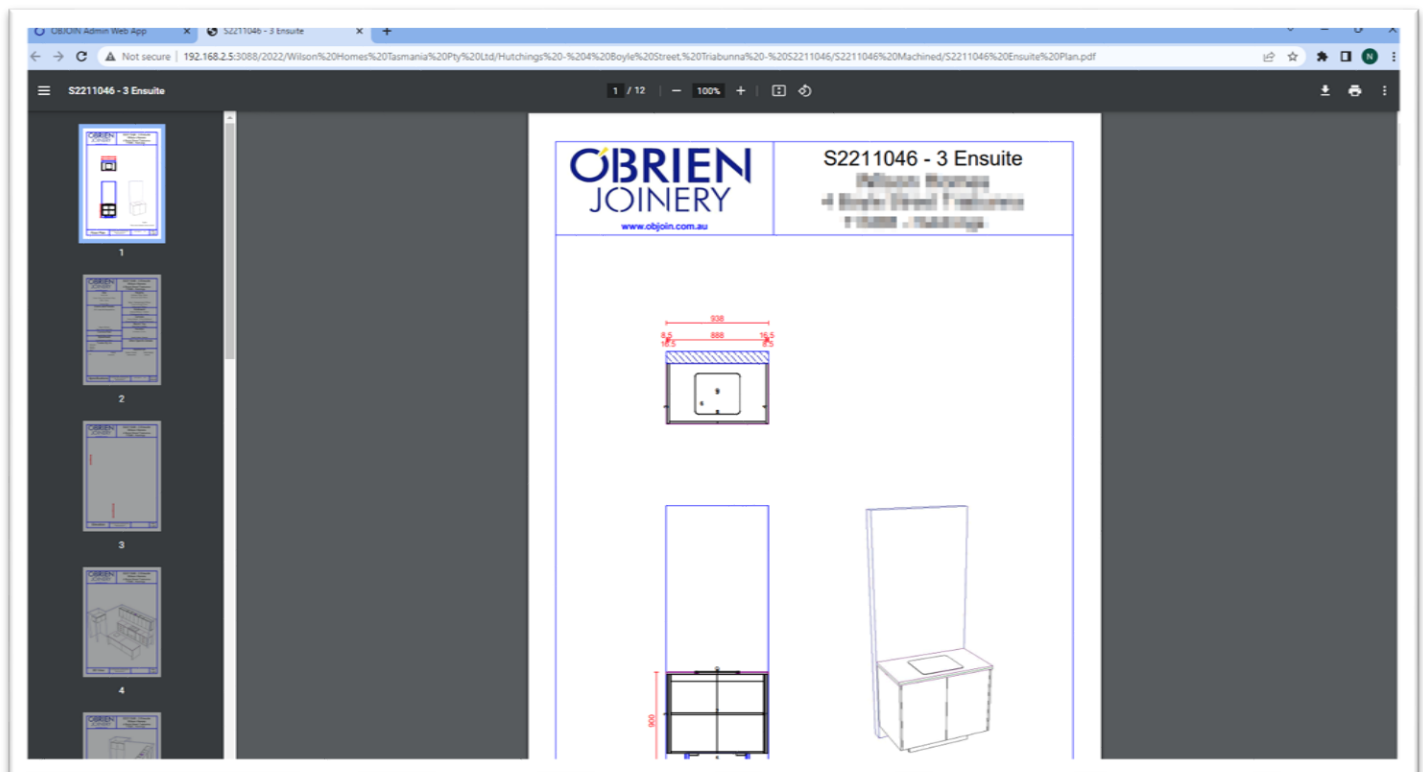
2. Manage Installation Orders

2.1 Click Installation Orders in the menu bar, will show the installation orders list.
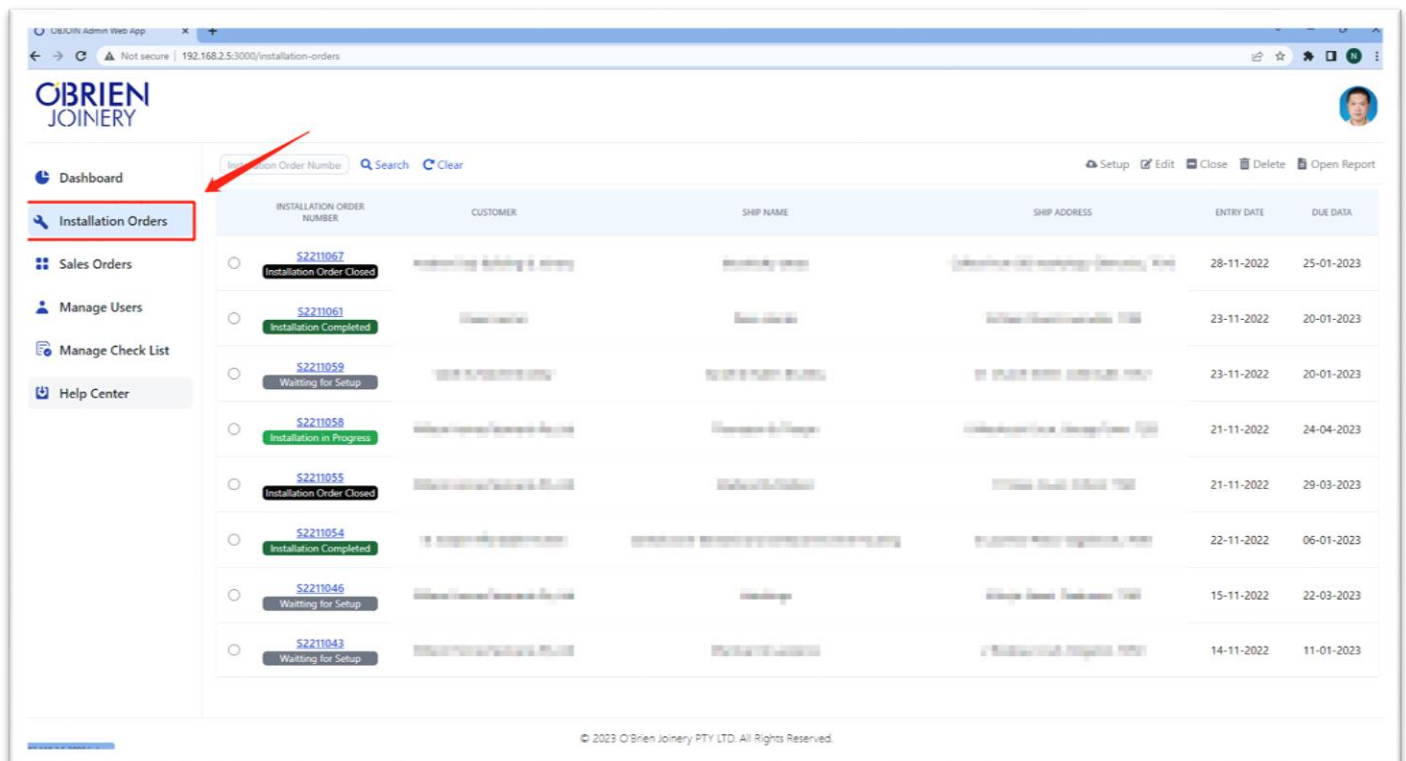
2.2 Select an installation order with 'Waiting for Setup' status and press the Setup button in the top right corner.

2.3 Select shipping staff and installation staff in the setup installation order form.

2.4 Select PDF files (will be uploaded to the cloud server) and then press the Setup Installation Order button.
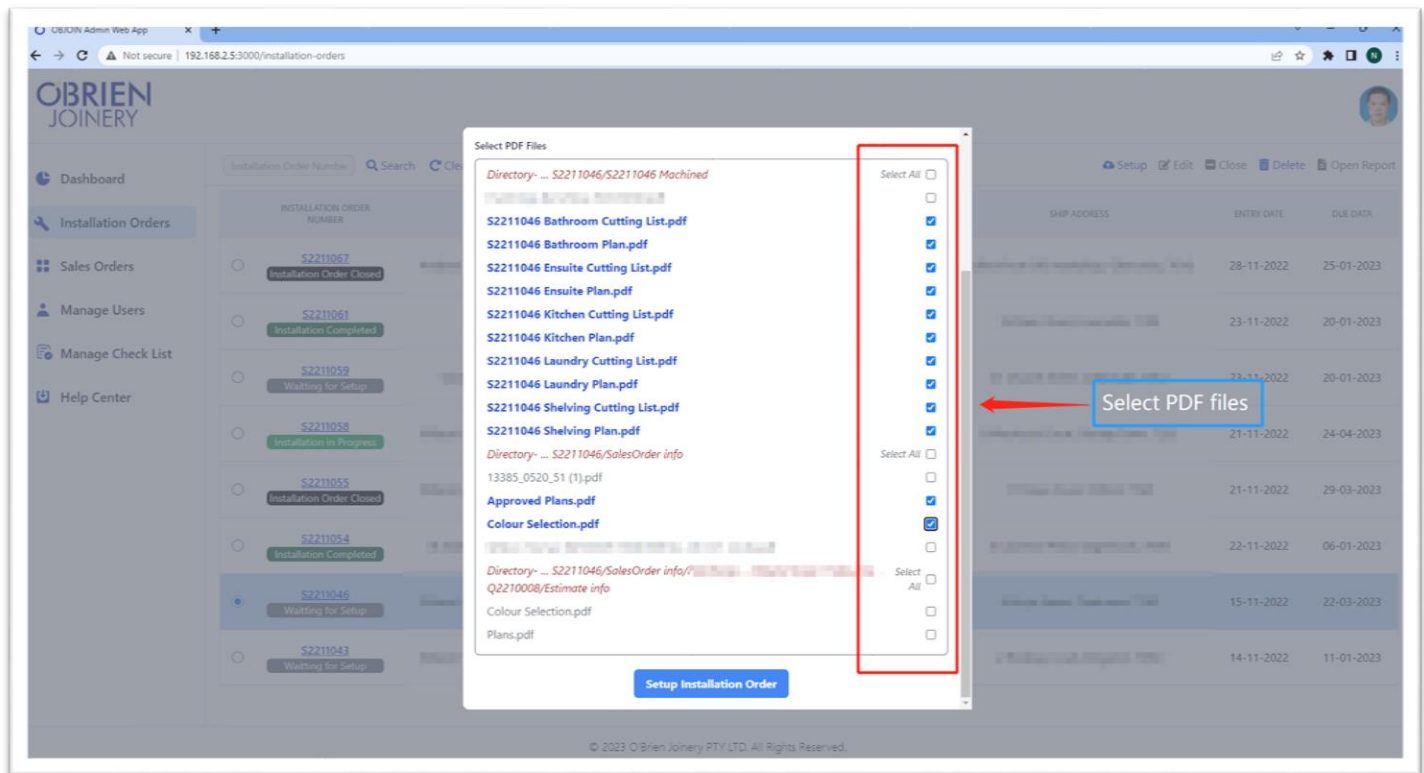
2.5 After few seconds of loading time, the installation order status will be changed to 'Waiting for Delivery', and then there will be a success notice at the top right corner.
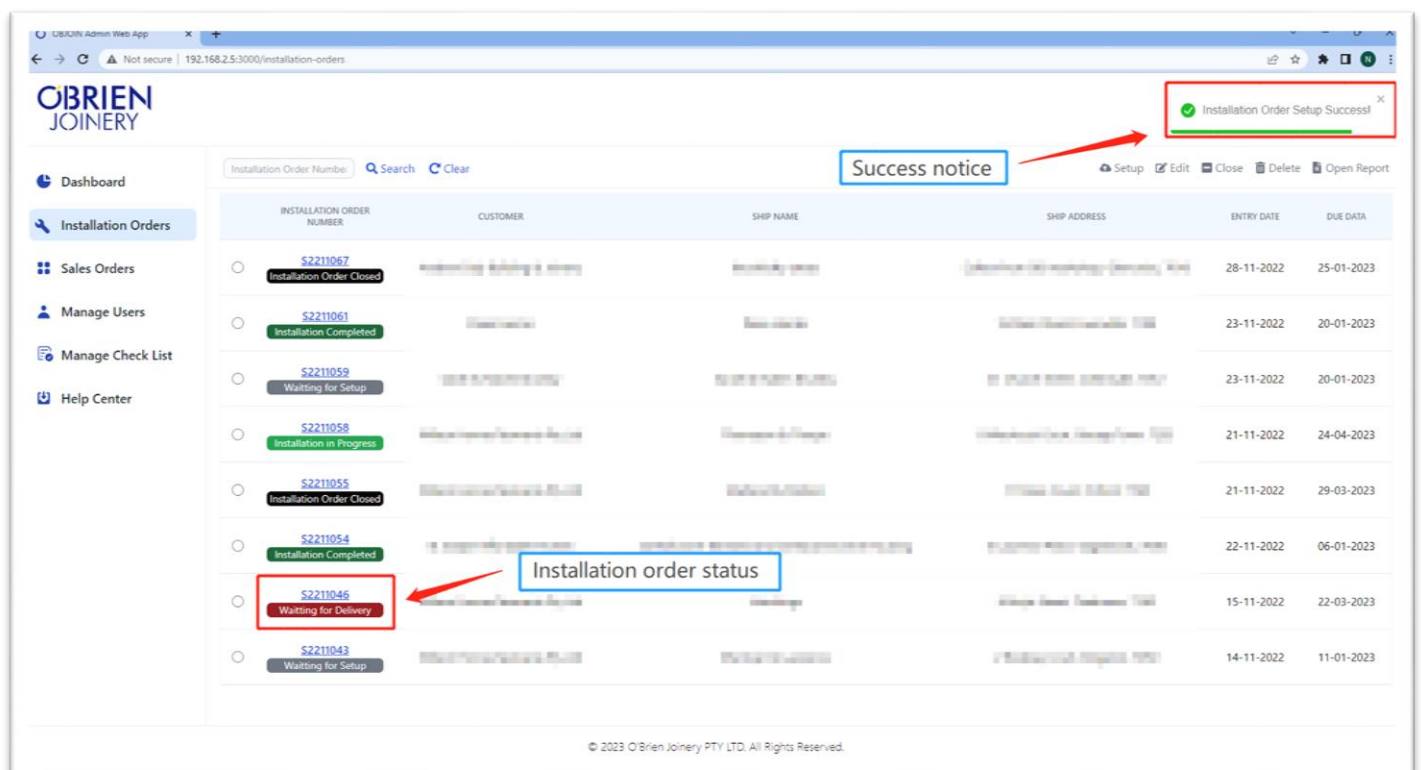
2.6 We can edit (reset shipping staff, installers and uploaded pdf files) or delete the installation order while the work status is 'Waiting for delivery', but once the delivery work is finished, the installation order can no longer be edited or deleted.

2.8 Once the delivery and installation work are all finished (work status becomes 'Installation Completed'), then we can close the installation order. The closed installation orders will be removed from the shipping staff and installer's work order list, and the mobile app will delete the pdf files and photos on their device.

2.9 Open installation order report: select an installation order with 'Installation Completed' or 'Installation Order Closed' status, then click the Open Report button at the top right corner, the application will open the installation report page in a new tab.

2.10 Right click on the installation report page and select 'Print'.

2.11 Set the destination as 'Save as PDF', and then press save button, save the installation report as a PDF file.
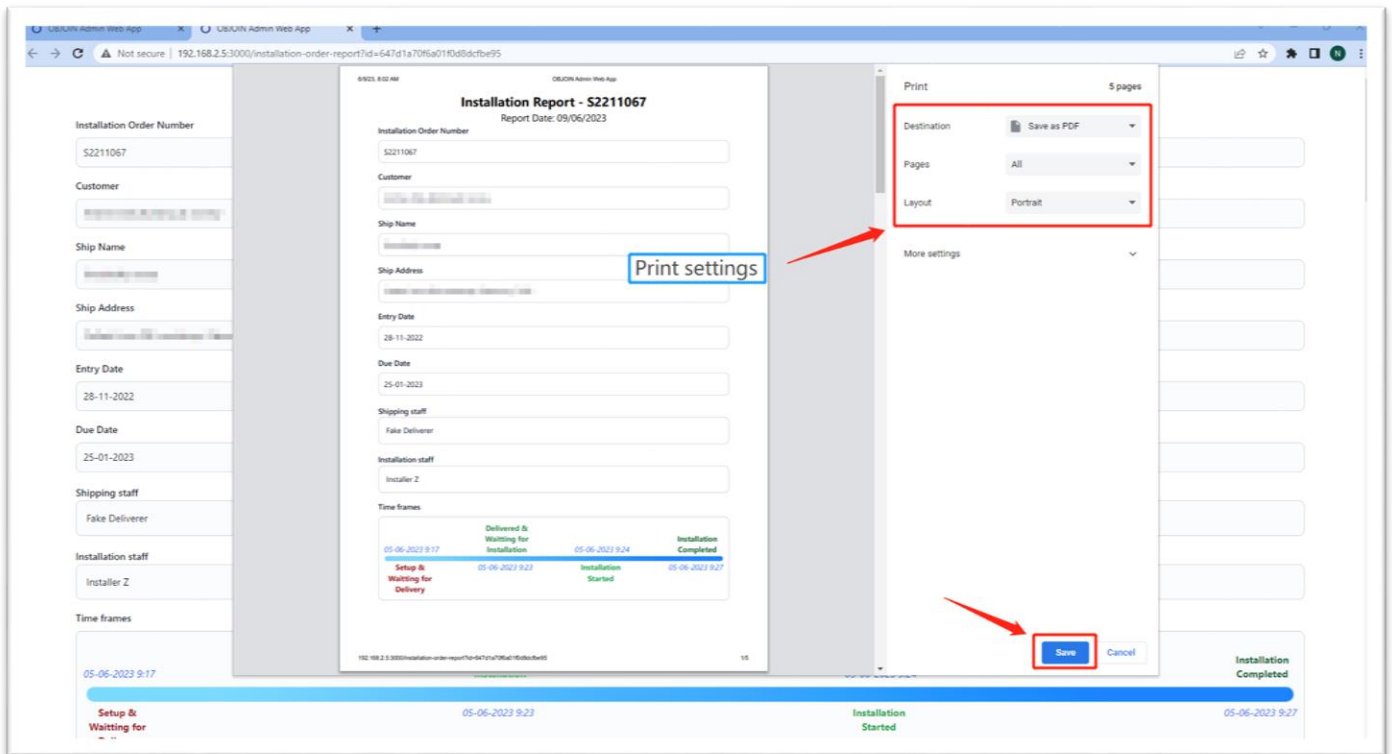
2.12 We can open the saved installation report file in the browser.

3. Manage Users

3.1 Click Manage Users in the menu bar, will show the system user list. We can select a user from the user list and disable or enable a user account. The disabled user will not be able to login to the web and mobile app.
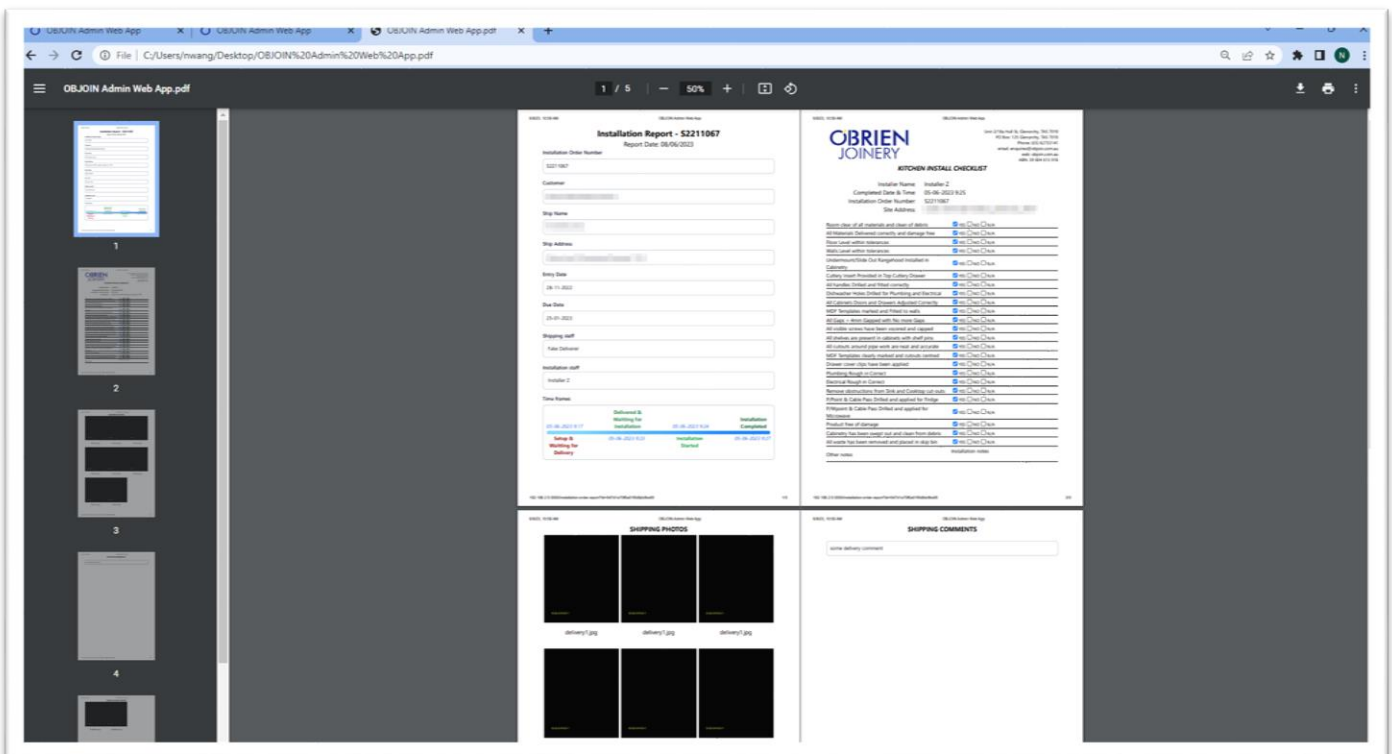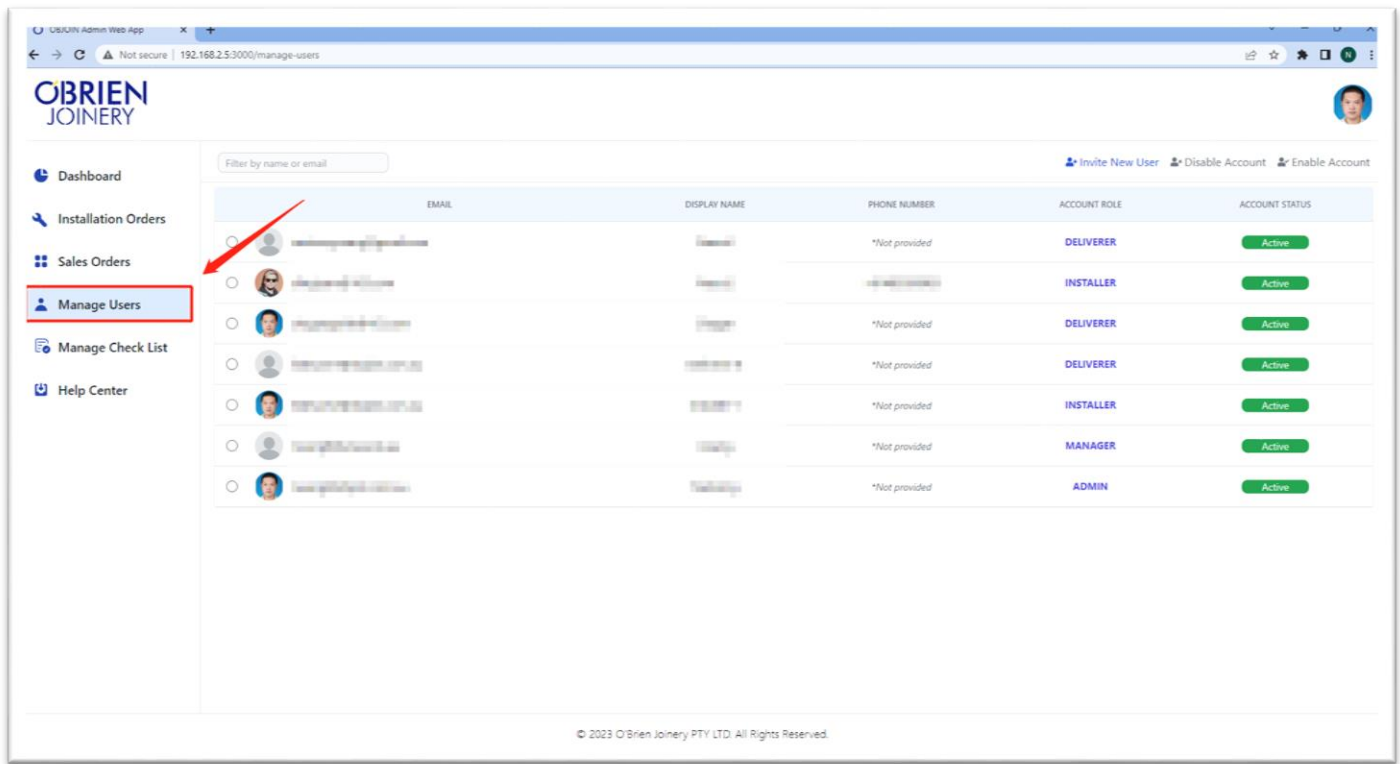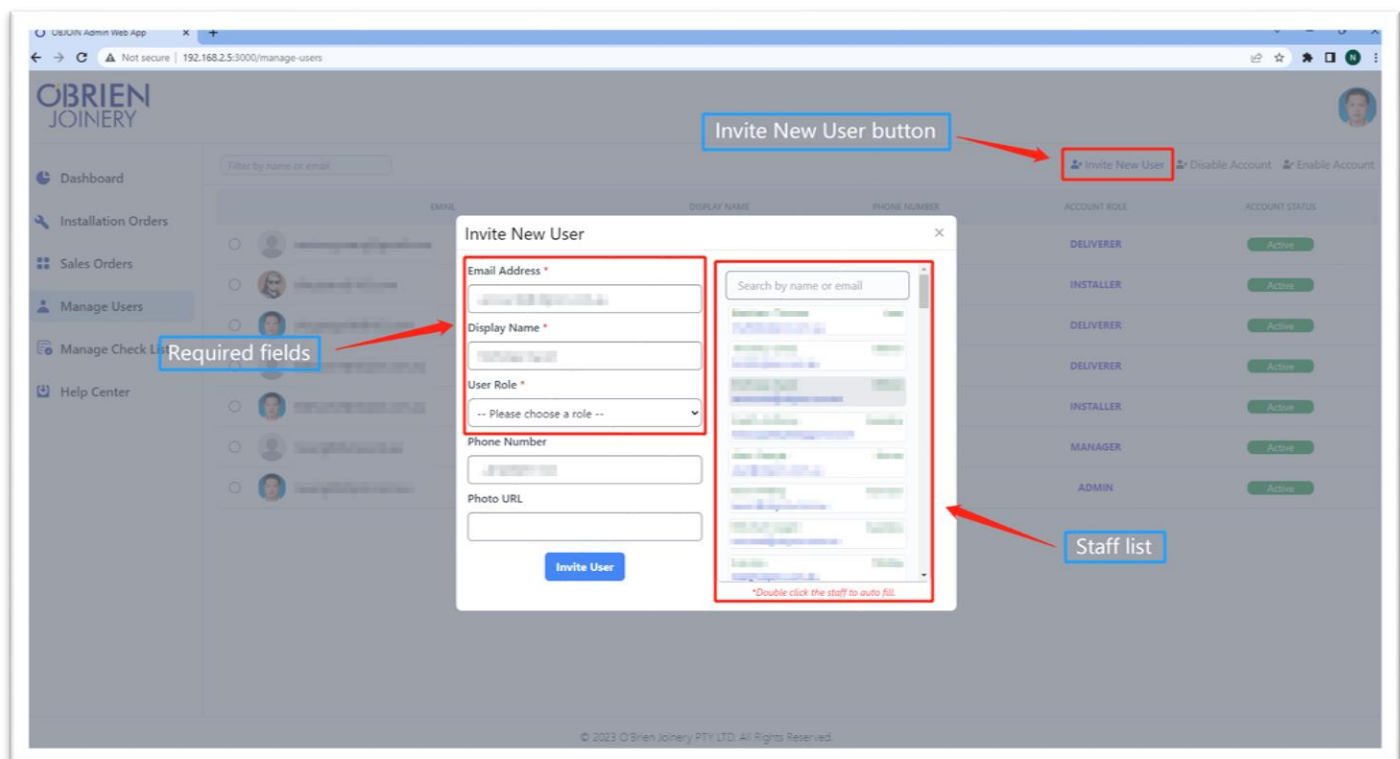

3.2 Click the Invite New User button, will show the add new user form. We can manually insert the required fields or double click the staff in the staff list to automatically fill the form.
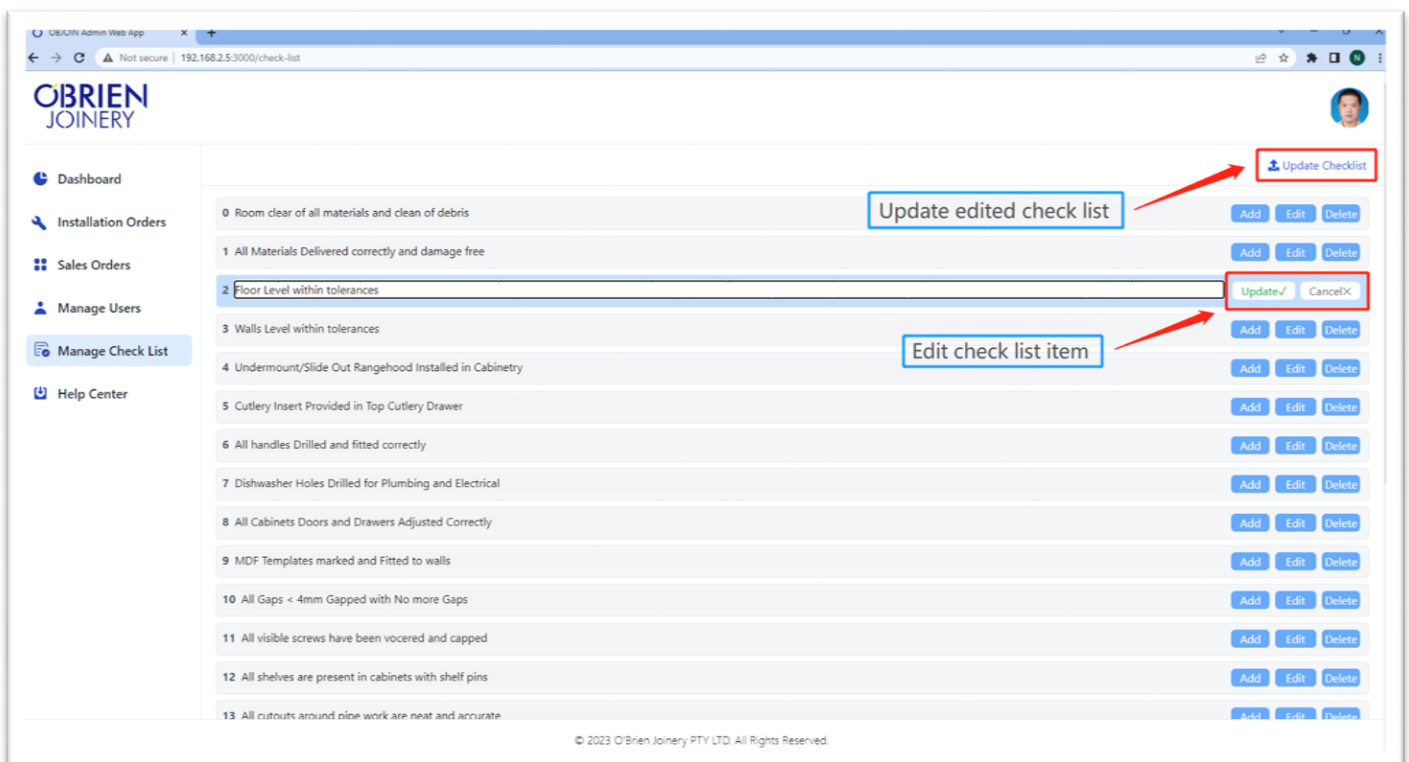
4. Manage Check List

4.1 Click Manage Check List in the menu bar, will show the 'Kitchen Install Checklist' content. We can add a new check list item to the next line, or edit or delete the current line.
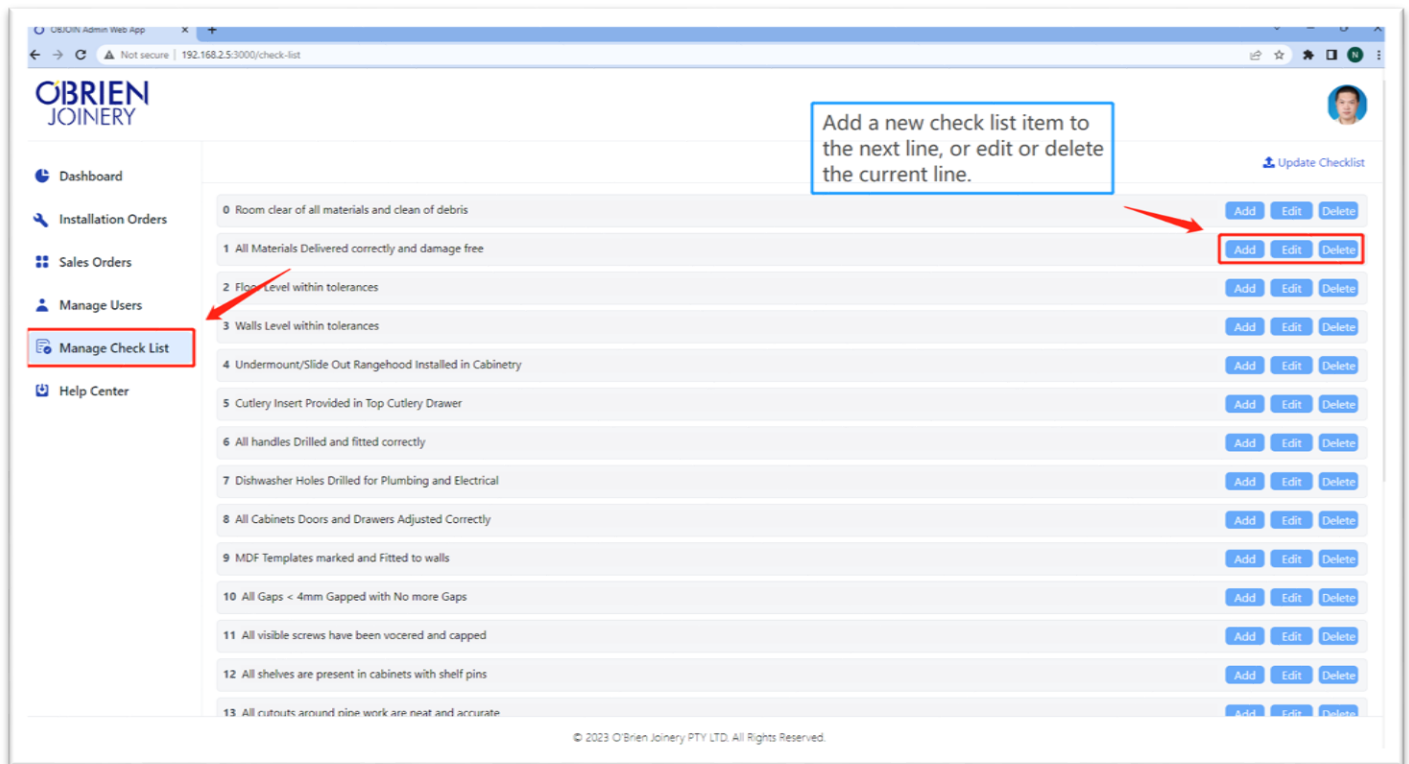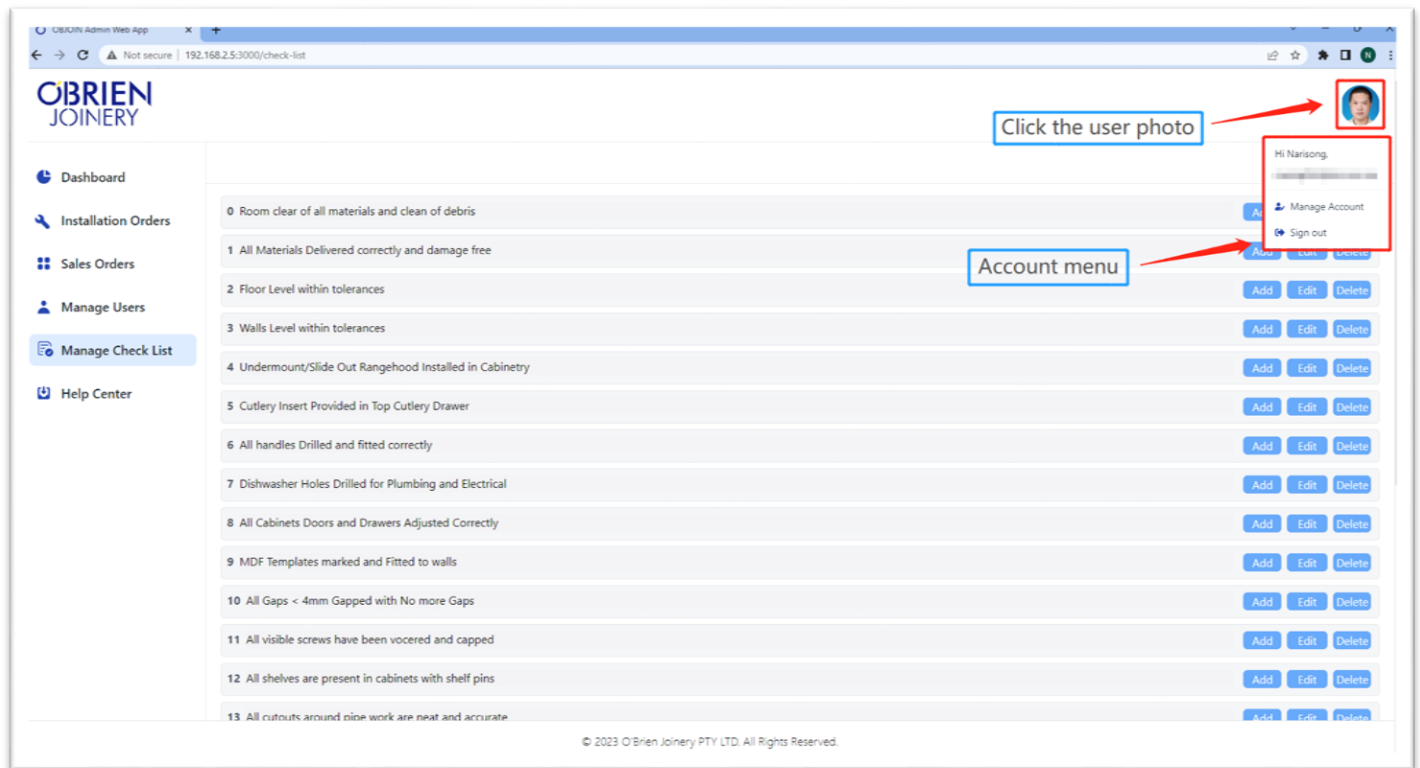

4.2 Once finished editing, we can click the Update Checklist button to the top right corner to save the edited check list.
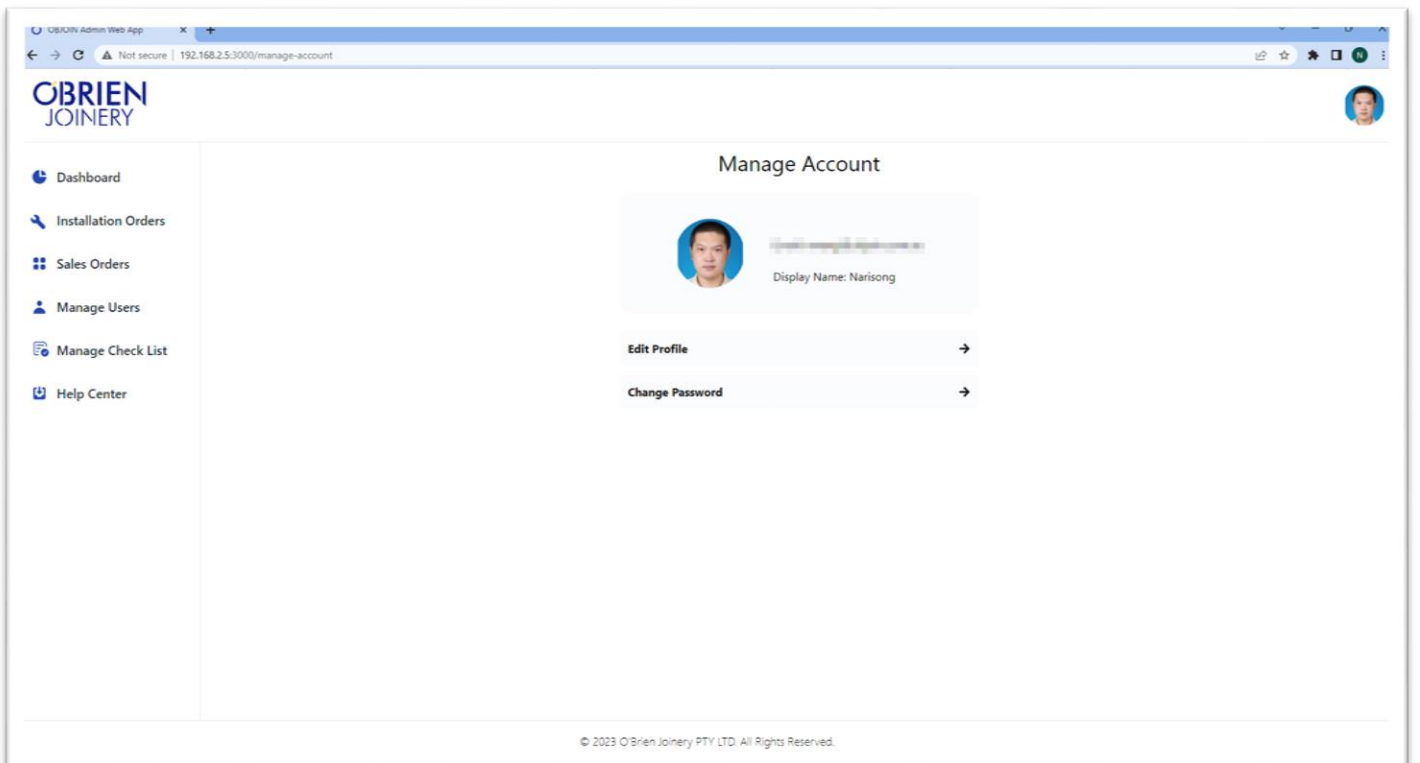
5. Manage account

5.1 Click on the user photo at the top right corner, will show the account menu.

5.2 Manage Account page

5.3 Edit Profile

5.4 Change Password