

# ZORT User Guide



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## Welcome to ZORT

"ZORT" is the order and inventory management platform which is co-developed by a team of online sellers. Our goal is to make the life of multi-channel sellers easier by offering a wide range of tools to help manage your transactions, shipments, and finance all in one place. Moreover, ZORT integrates with all sales channels so you can streamline your business with our all-in-one online system. No installation needed. Sell anywhere and anytime at [www.zortout.com](http://www.zortout.com)

# Feature Overview

## Order Management

Monitor sales orders from Lazada, Shopee, JD Central, offline stores and other online channels on the ZORT dashboard. Work less and manage orders right away from one single place.

## Inventory Management

Have your stock automatically synchronized across all sales channels. Avoid stockouts or inaccurate inventory data. See your real-time remaining items anywhere and anytime on ZORT.

## Reports

Plan out your business more professionally with our insightful data generated from the ZORT report feature, such as sales-profit report, best selling product report, dead stock report, customer report and so on.

## Finance

Make accounting easy with ZORT. Record and organize your income and expense account more effectively. Create and store your financial records and other documents in a ready-to-use format for your future accounting tasks.

## Dropship

Create a sales page catalog, allowing your sales agents to place their orders directly. Automatically calculate agents' commission in less than a minute.

## Shipping Service

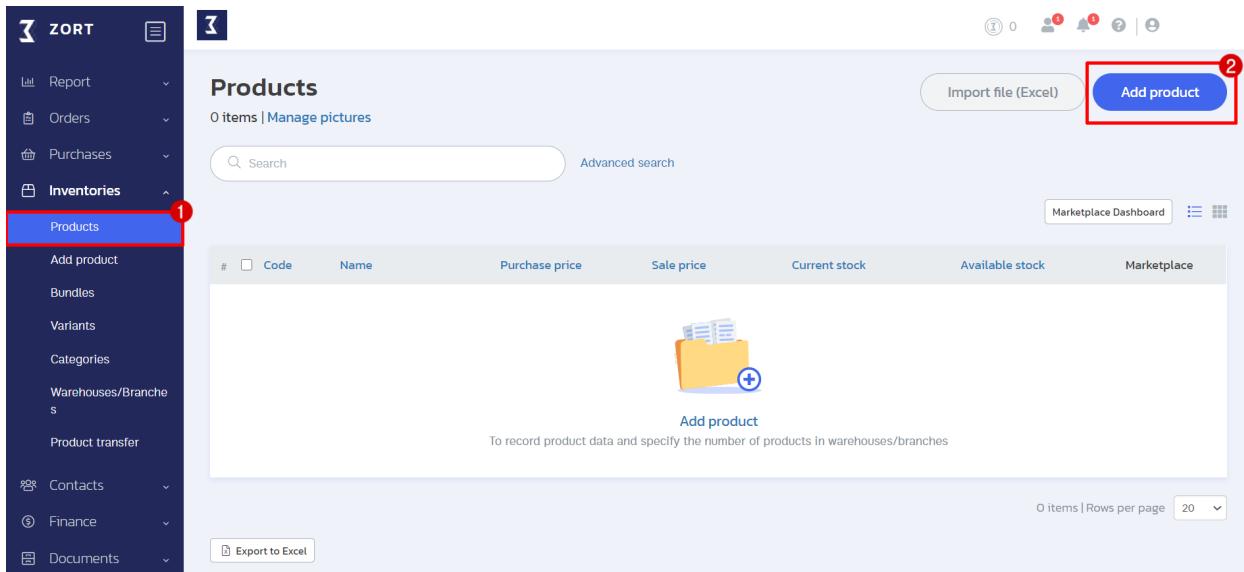
Integrate with Thailand's top shipping service providers such as Thailand Post, KERRY Express, Flash Express, J&T Express and so on. Print out shipping labels and pack your items faster with ZORT barcode system.

# Products

## Creating Products

To get started, the first step is to add products to your inventory by following the steps below.

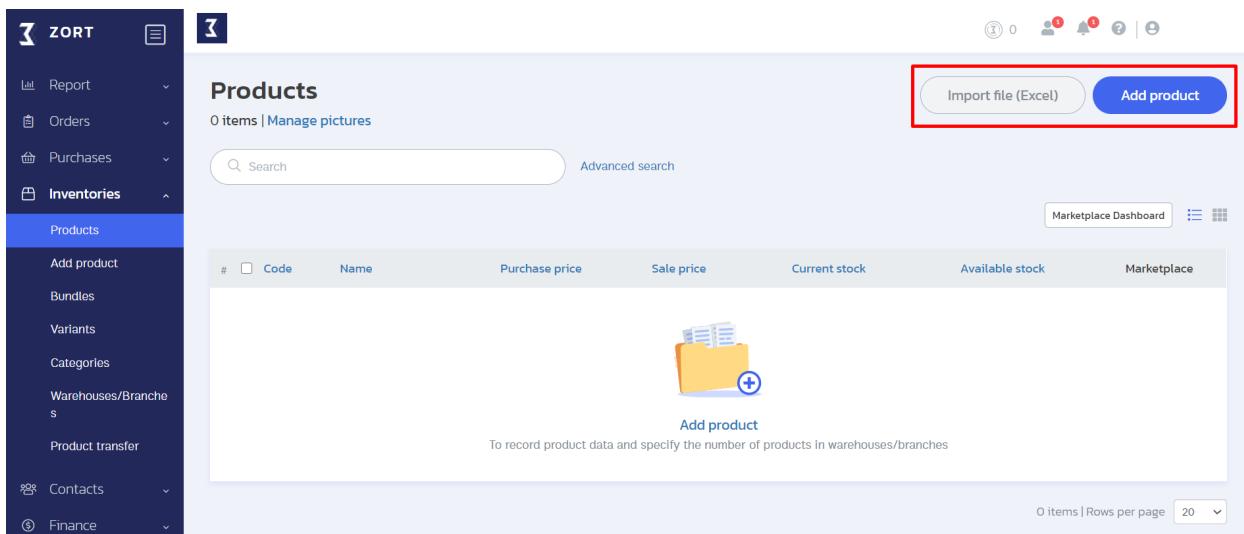
1. Go to the "Products" menu.



The screenshot shows the ZORT software interface. On the left, there is a sidebar with various menu items: Report, Orders, Purchases, Inventories, Products (which is highlighted with a red box and a red number '1'), Add product, Bundles, Variants, Categories, Warehouses/Branches, Product transfer, Contacts, Finance, and Documents. The main area is titled 'Products' and shows a table with columns: #, Code, Name, Purchase price, Sale price, Current stock, Available stock, and Marketplace. Below the table, there is a large orange folder icon with a plus sign and the text 'Add product'. A tooltip says 'To record product data and specify the number of products in warehouses/branches'. At the top right, there is a blue button labeled 'Add product' with a red box around it and a red number '2' above it. Other buttons include 'Import file (Excel)' and 'Marketplace Dashboard'.

There are 2 possible ways to add products to your inventory:

1. Adding one product at a time (Add product).
2. Importing products from an Excel file (Import file (Excel)).



This screenshot is identical to the one above, showing the ZORT software interface with the 'Products' menu selected. Both the 'Add product' button (with a red box and red number '2') and the 'Import file (Excel)' button (with a red box) are highlighted with red boxes.

## 1. Adding one product at a time (Add product).

Fill in all the necessary details.

ZORT

Report

Orders

Purchases

Inventories

- Products
- Add product
- Bundles
- Variants
- Categories
- Warehouses/Branches
- Product transfer
- Contacts
- Finance
- Documents

0 1 0 0

### Add product

**Product detail**

Attribute	No variant
Code	P0010
Name *	Wooden Chair
Category	Furniture & Home decoration
Unit	piece
Barcode	
Tag Product	

**Setting**

Serial Number  
 Lot/Expiry

**Price**

Purchase price	250.00
Sale price	700.00

**Logistic**

Weight (Gram(s))	1,800.00
Size (width length height) (cm.)	width height length

**Warehouse/branch**

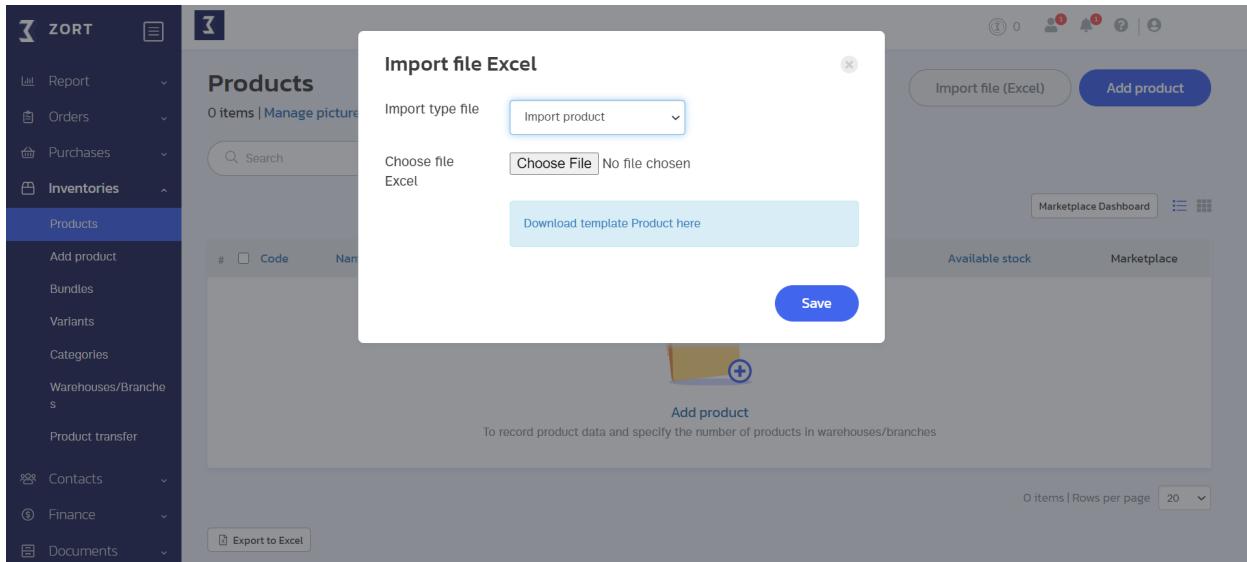
Initial stock	50.00
In Warehouse/branch	

Save + Add another Save

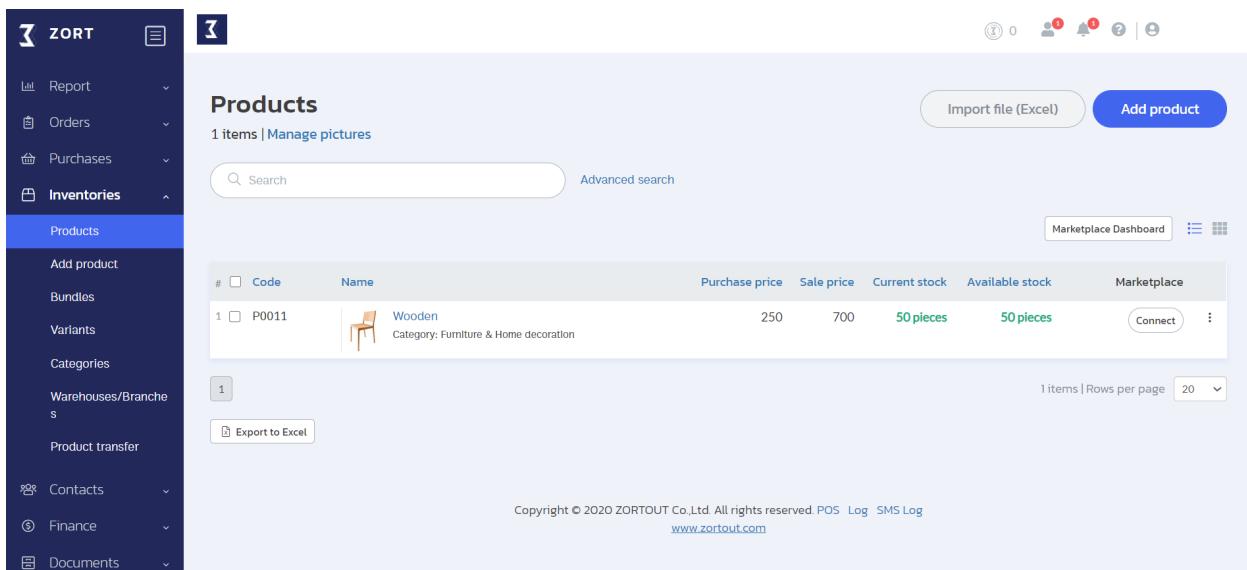
Copyright © 2020 ZORTOUT Co.,Ltd. All rights reserved. POS Log SMS Log  
[www.zortout.com](http://www.zortout.com)

## 2. Importing products from an Excel file (Import file (Excel)).

To import products from an Excel file, you have to download a template from the ZORT system in order to import the product information in a valid format.



Once you complete filling in all the required information, click on "Save." Your recently created product will appear as in this picture.



# Viewing Product Details

Once you finish adding products to your inventory, you can see the details of each product by following the steps below.

1. Go to the “Inventories” menu and select “Products.”
2. Click on the item of which details you want to see.

The screenshot shows the ZORT software interface. On the left, a dark sidebar menu is open under the 'Inventories' section, with 'Products' highlighted and a red circle with the number '1' above it. The main area is titled 'Products' and shows a list of two items: 'T-Shirt' (Category: Fashion) and 'Wooden Chair'. The 'T-Shirt' row is highlighted with a red box and a red circle with the number '2' above it. The table columns include #, Code, Name, Purchase price, Sale price, Current stock, Available stock, and Marketplace. At the bottom right of the main area, there are buttons for 'Import file (Excel)', 'Add product', 'Marketplace Dashboard', and a grid icon.

The product details will appear as in the picture.

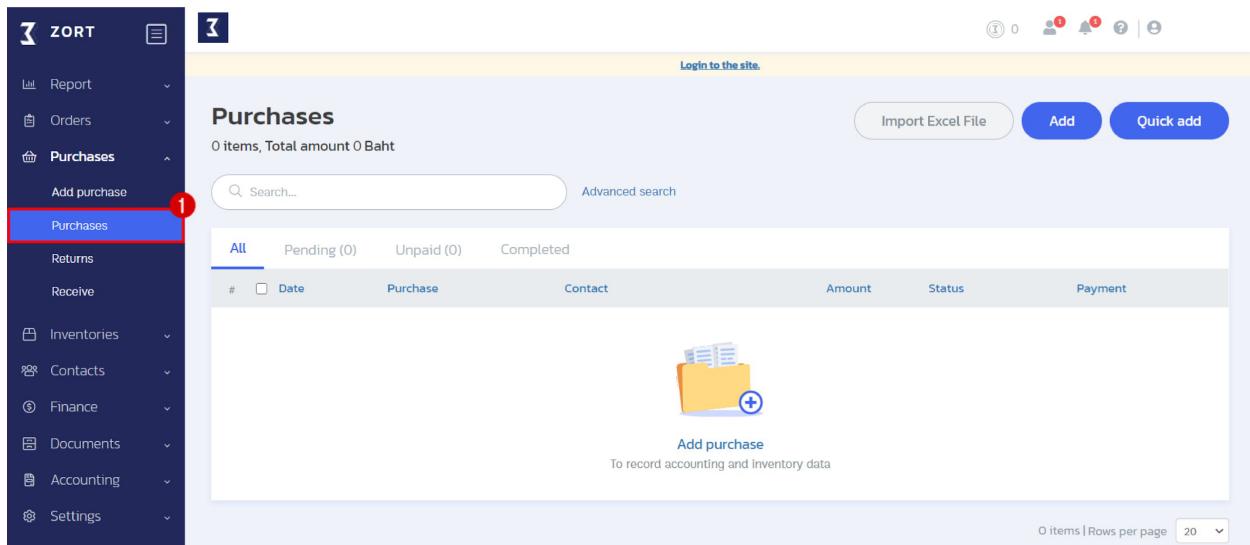
The screenshot shows the 'Product detail T-Shirt' page. The left sidebar is identical to the previous screenshot, with 'Products' selected. The main title is 'Product detail T-Shirt'. Below the title are several buttons: 'Edit', 'Delete', 'Action', 'Adjust', 'Print', and 'Synchronize'. To the right of these buttons are four summary boxes: 'Current stock (pieces)' with value '100', 'Available stock (pieces)' with value '100', 'Share Link' (with a QR code icon), and 'Sales this month (Baht)' with value '2,500'. Below these boxes is a detailed product card for 'T-Shirt (Fashion)'. It includes a pink t-shirt image, product code 'P0012', average cost '50 Baht', sale price '250 Baht', purchase price '50 Baht', and a note 'ไม่มีข้อมูลในBundle' with 'No data' below it.

# Purchase Orders

## Creating Purchase Orders

After you set up your inventories, you can input the stock quantity and record your purchase history in order to have the ZORT system calculate costs and profits of each item.

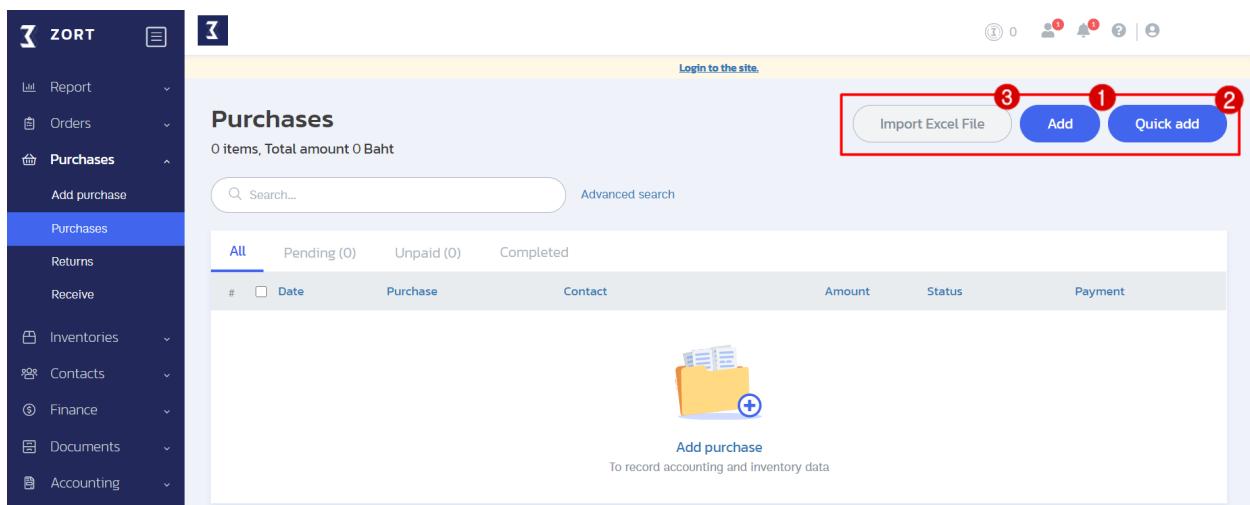
1. Go to the "Purchases" menu and select "Purchases."



The screenshot shows the ZORT software interface. On the left, there is a dark sidebar with various menu items: Report, Orders, Purchases (which is highlighted with a red box and has a red '1' icon), Add purchase, Returns, Receive, Inventories, Contacts, Finance, Documents, Accounting, and Settings. The main area is titled 'Purchases' and displays a message '0 items, Total amount 0 Baht'. It includes a search bar, filter options (All, Pending (0), Unpaid (0), Completed), and columns for #, Date, Purchase, Contact, Amount, Status, and Payment. At the bottom, there is a large orange button labeled 'Add purchase' with the sub-instruction 'To record accounting and inventory data'. The top right corner shows user icons and a notification count of 1.

There are 3 possible ways to create sales orders:

1. Creating 1 purchase order at a time (Add).
2. Creating a quick sales order (Quick add)
3. Importing purchase orders from an Excel file (Import Excel File).



This screenshot is identical to the one above, showing the 'Purchases' screen in the ZORT software. However, the top right buttons are now highlighted with a red box and numbered: 'Import Excel File' (3), 'Add' (1), and 'Quick add' (2). The rest of the interface remains the same, including the sidebar menu and the central data grid.

## 1. Creating 1 purchase order at a time (Add).

This is used for creating a detailed purchase order. Data related to this purchase order will be securely stored in the system. There are 3 main sections to fill in the order details.

**Section 1 : Document details such as the transaction number, date, type of VAT, and contact info.**

Info		Contact	
Type	Purchase	Contact name	<input type="text"/>
Transaction *	PO-202010001	Contact code	<input type="text"/>
Date *	7/10/2020	Contact phone	<input type="text"/>
Ref.	<input type="text"/>	Contact email	<input type="text"/>
VAT Cal.	No VAT	Contact address	<input type="text"/>
<input checked="" type="checkbox"/> Tax ID, Branch			

**Section 2 : Product detail, product code, product name, price, and discount.**

Code	Product name *	Quantity *	Unit price *	Unit discount	Total
Choose	P286	Wooden Chair	5.00	1,500.00	Amount or % 7,500.00

+ Add product

Shipping channel	Flash Express	Discount	Amount or %
Remark	<input type="text"/>	Shipping fee	50.00
		Sub total	7,500.00
		VAT (7%)	0.00
		Purchases Total	7,500.00
		Net Amount	7,550.00

## Section 3 : Shipping, payment and transferring status.

Purchases Total 7,500.00  
Net Amount 7,550.00

**Shipping**  
Shipping date: 07/10/2020 12:00

**Payment**  
Payment: None  
Transfer: Pending  
Used to record payments. To show the payment status.

**Warehouses/Branches**  
Transfer: Pending  
Complete: Complete  
คลังสินค้าหลัก

Back Save + Add another Save

Once you save the changes, the purchase order will appear as in the picture.

Purchase detail  
Unpaid Completed

**Info**  
Transaction: PO-202010002  
Type: Purchase  
Date: 7 October 2020  
Created by: กษก จันมณฑล

**Contact**  
Contact name: Mr. Bush  
Contact phone: 0800001100  
Contact email: bush.z@demo.com  
Contact address: 11/12 Pleasant Ville, Sims Street, Thung Phayathai, Ratchathewi, Bangkok 10400  
Tax ID: 0100054444684  
Branch name: Headquarters

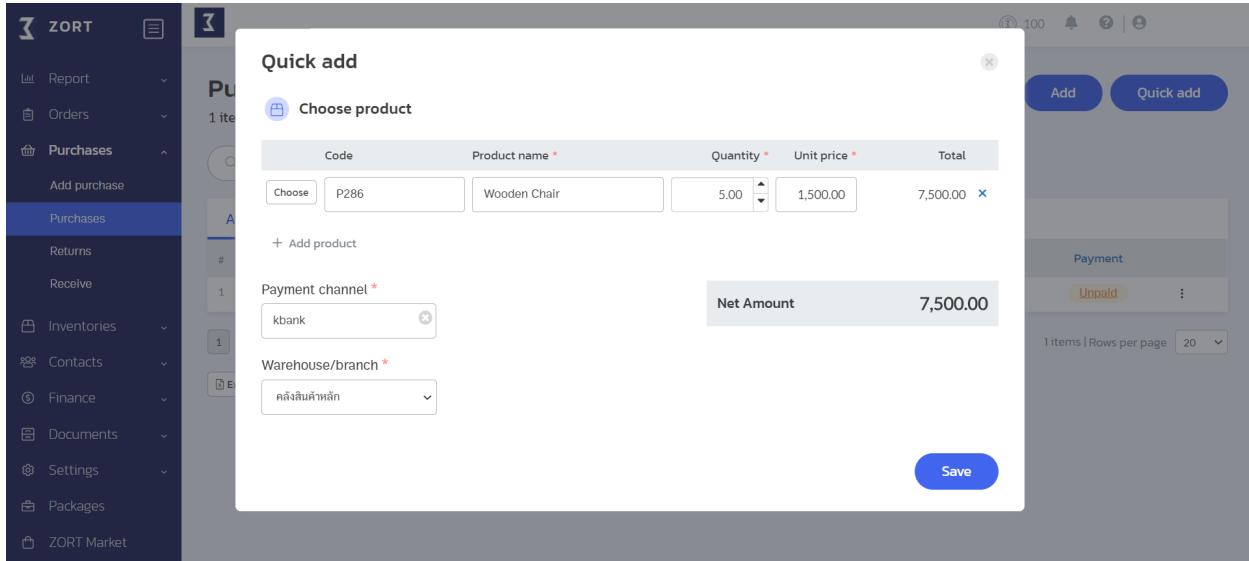
**Product**

Code	Product name	Quantity	Unit price	Unit discount	Total
P286	Wooden Chair	5 pcs.	1,500	-	7,500

Remark: -  
Total quantity: 5  
Purchases Total: 7,500  
Shipping fee: 50  
Net Amount: 7,550

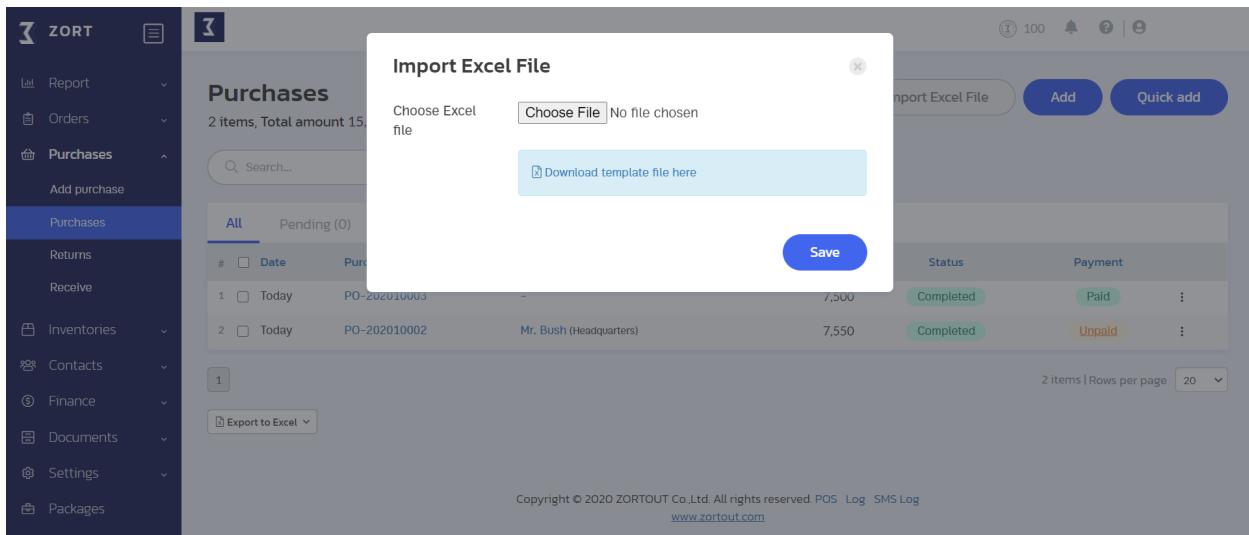
## 2. Creating a quick purchase order (Quick add).

This is for creating a quick purchase order without adding the merchant info and other statuses.



## 3. Importing purchase orders from an Excel file (Import Excel file).

To import purchase orders from an Excel file, you need to download a template from the ZORT system to import data in a valid format.



## Viewing Purchase Orders

You can track all your purchase orders from the "Purchases" menu, where you can check the status of each payment and delivery.

1. Go to the "Purchases" menu and select "Purchases." You can see all the purchase orders you made and their status as in the picture.

The screenshot shows the ZORT software interface. On the left, there is a sidebar with various menu items: Report, Orders, Purchases (which is highlighted with a red box and a red number 1), Add purchase, Returns, Receive, Inventories, Contacts, Finance, Documents, Settings, Packages, and ZORT Market. The main area is titled "Purchases" and displays a table of purchase orders. The table has columns: #, Date, Purchase, Contact, Amount, Status, and Payment. There are three rows of data:

#	Date	Purchase	Contact	Amount	Status	Payment
1	Yesterday	PO-202009003	กุณเจน	27,500	Completed	Paid
2	Yesterday	PO-202009002	กุณเมฆา	39,000	Pending	Paid
3	Yesterday	PO-202009001	กุณพิทักษ์	27,500	Pending	Unpaid

At the bottom of the screen, there is a copyright notice: Copyright © 2020 ZORTOUT Co.,Ltd. All rights reserved. POS Log SMS Log [www.zortout.com](http://www.zortout.com).

Remark :

Status

- Completed : The items have arrived at the warehouse.
- Partial : Only some of the purchased items have arrived at the warehouse.
- Pending : Waiting for the items to arrive.
- Cancelled : The order has been cancelled.

Payment

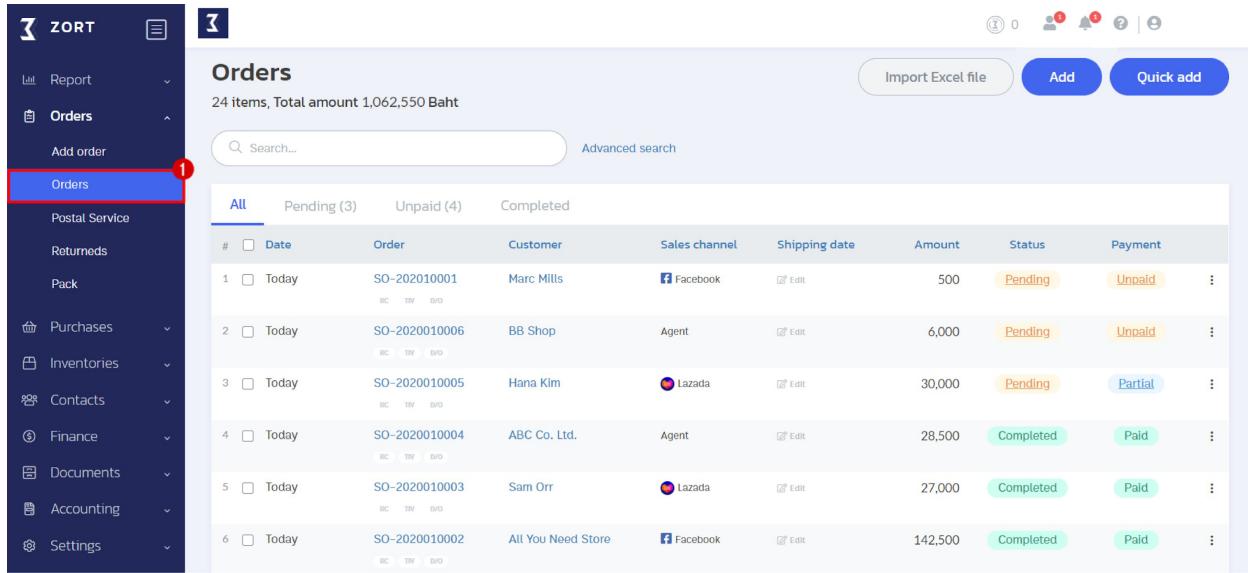
- Paid : The full amount has been paid.
- Partial : Only some of the amount has been paid.
- Pending : Waiting for the payment.
- Cancelled : The payment has been cancelled.

# Sales Orders

## Creating Sales Orders

You can create sales orders to record all your incomes and other important information by following the steps below.

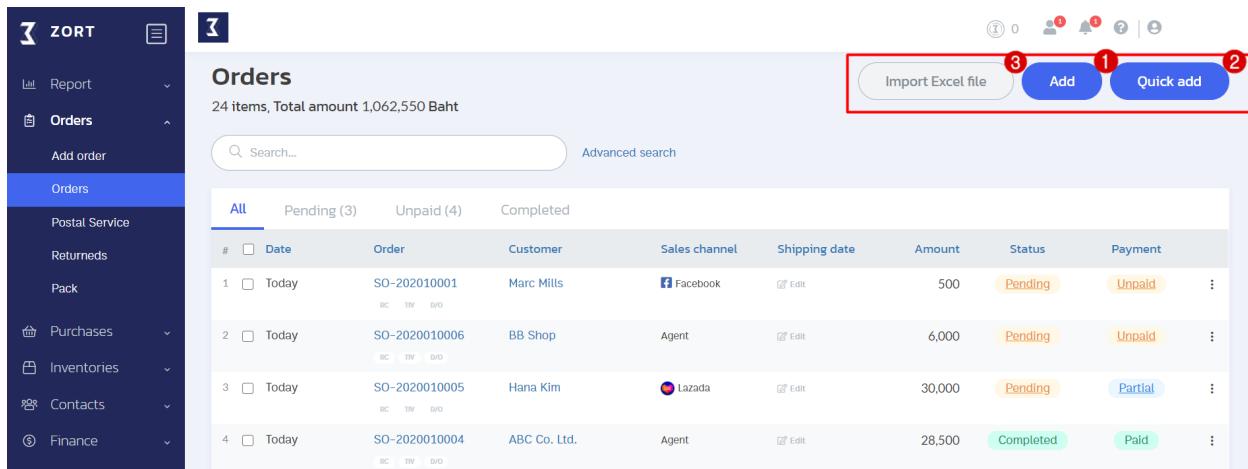
1. Go to the "Orders" menu and select "Orders."



The screenshot shows the ZORT software interface. On the left, there is a vertical sidebar with a dark blue header containing the ZORT logo and a report icon. Below the header, the sidebar has several sections: 'Report' (with a downward arrow), 'Orders' (selected, indicated by a red box and a red number '1'), 'Add order', 'Postal Service', 'Returneds', 'Pack', 'Purchases' (with a downward arrow), 'Inventories' (with a downward arrow), 'Contacts' (with a downward arrow), 'Finance' (with a downward arrow), 'Documents' (with a downward arrow), 'Accounting' (with a downward arrow), and 'Settings' (with a downward arrow). The main content area is titled 'Orders' and displays a table of 24 items. The table columns include '#', 'Date', 'Order', 'Customer', 'Sales channel', 'Shipping date', 'Amount', 'Status', and 'Payment'. The first item in the list is SO-202010001, ordered by Marc Mills via Facebook, pending payment of 500 Baht. The table also includes filters for 'All', 'Pending (3)', 'Unpaid (4)', and 'Completed'.

There are 3 possible ways to create sales orders:

- 1.) Creating one sales order at a time. (Add)
- 2.) Creating a quick sales order (Quick add)
- 3.) Importing sales orders from an Excel file (Import Excel file)



This screenshot is identical to the previous one, showing the ZORT software interface with the 'Orders' menu selected. However, the top right corner of the main content area is highlighted with a red box, containing three numbered buttons: 'Import Excel file' (number 3), 'Add' (number 1), and 'Quick add' (number 2). These buttons are used for creating new sales orders.

## 1. Creating one sales order at a time. (Add)

This is used for creating a detailed purchase order. Data related to this purchase order will be securely stored in the system. There are 3 main sections to fill in the order details.

Section 1 : Document details such as the transaction number, date, type of VAT, and customer info.

ZORT

Report

Orders

Add order

Orders

Postal Service

Returneds

Pack

Purchases

Inventories

Contacts

Finance

Documents

Accounting

Orders

Add Order

Info

Type: Sell

Order: SO-202010002

Date: 7/10/2020

Ref.

Sales channel: Facebook

VAT Cal.: Include VAT 7%

Agent: None

Customer

Customer name: Ben Lee

Customer code: 00014

Customer phone: 0812221111

Customer email: benjamin.l@demo.com

Customer address: 321 Water Gate | BKK 10260

Tax ID, Branch

Section 2 : Product detail, product code, product name, price, and discount.

ZORT

Report

Orders

Add order

Orders

Postal Service

Returneds

Pack

Purchases

Inventories

Contacts

Finance

Documents

Accounting

Settings

Packages

ZORT Market

Product

Code	Product name *	Quantity *	Unit price *	Unit discount	Total
P0005	Fancy T-Shirt	1.00	250.00	Amount or %	250.00

+ Add product

Shipping channel: Kerry

Remark:

Discount	Amount or %
Shipping fee (Customer paid)	50.00
<input type="checkbox"/> VAT	
Sub total	233.64
VAT (7%)	16.36
Sales Total	250.00
Net Amount	300.00

## Section 3 : Recipient info, shipping, payment and transferring status.

The screenshot shows the ZORT software interface for creating a new order. The left sidebar navigation includes: Report, Orders (selected), Add order, Orders, Postal Service, Returns, Pack, Purchases, Inventories, Contacts, Finance, Documents, Accounting, Settings, Packages, and ZORT Market. The main content area is divided into four sections:

- Recipient info:** Fields include Recipient name (Ben Lee), Recipient phone (0812221111), Recipient email (benjamin.l@demo.com), and Shipping address (321 Water Gate Pavillion, Bangna, Bangkok, BKK 10260). A "Copy from customer info" button is available.
- Shipping:** Fields include Shipping date (08/10/2020 13:00) and Tracking No. (KR063623232TH).
- Payment:** Payment status is set to None. A "Used to record payments. To display the payment status. (Sales)" note is present. Buttons for "Add payment" and "Transfer" are shown.
- Warehouses/Branches:** Transfer status is Pending (radio button selected). Options for Undefined or Complete are available.

At the bottom are "Back", "Save + Add another", and "Save" buttons.

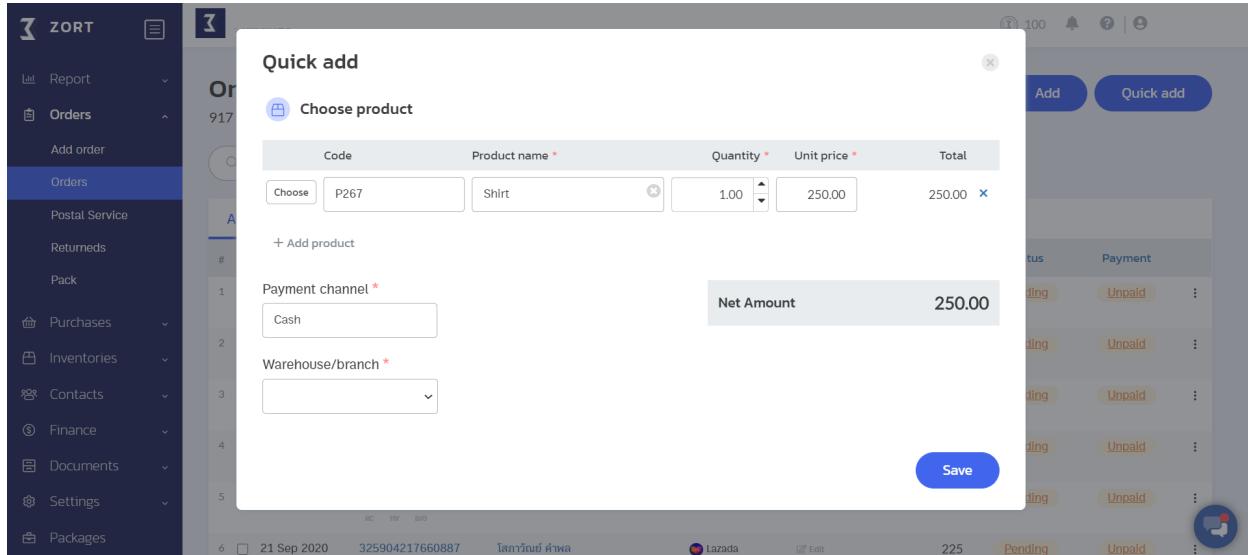
Once you save the changes, the sales orders created will appear as in the picture.

The screenshot shows the ZORT software interface displaying the details of a specific sales order. The left sidebar navigation is identical to the previous screenshot. The main content area shows:

- Order detail:** Order number SO-202010002, Type Sell, Date 7 October 2020, Sales channel Facebook. Status indicators show Payment status as Unpaid, Inventory status as Pending, and Shipping status as Kerry.
- Info:** Order details: Order (SO-202010002), Type (Sell), Date (7 October 2020), Sales channel (Facebook).
- Customer:** Customer details: Created by (Demo User), Customer name (Ben Lee), Customer code (00014), Customer phone (0812221111), Customer email (benjamin.l@demo.com), Customer address (321 Water Gate Pavillion, Bangna, Bangkok, BKK 10260), Tax ID (11220006565632), Branch name (Headquarters).

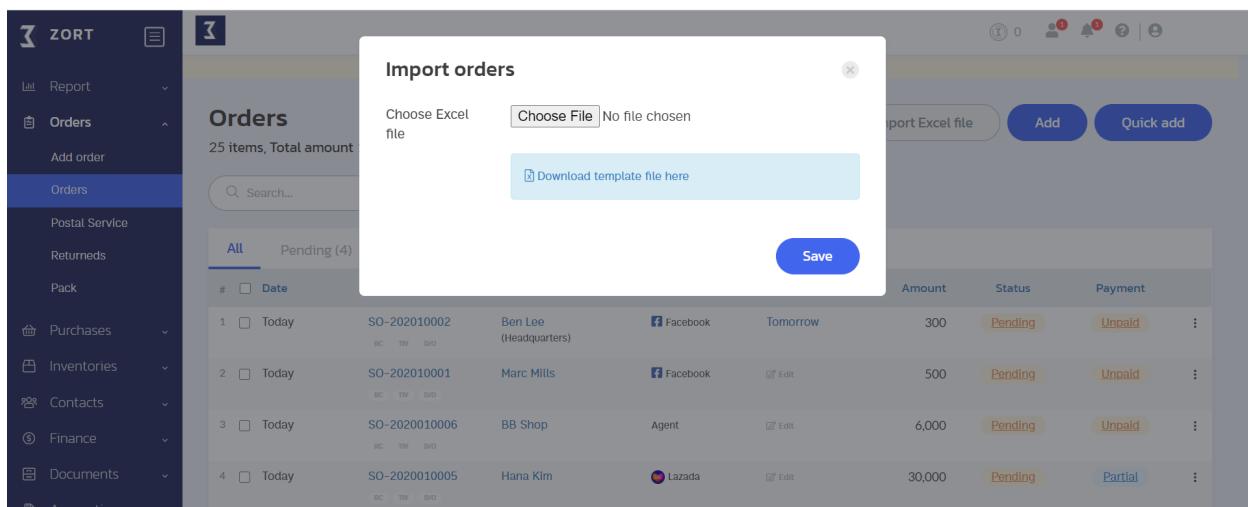
## 2. Creating a quick sales order (Quick add).

This is for creating a quick sales order without adding the customer info and other statuses.



## 3. Importing sales orders from an Excel file (Import Excel file).

To import sales orders from an Excel file, you need to download a template from the ZORT system to import data in a valid format.



## Viewing Sales Orders

You can monitor all your sales orders from the order dashboard in the "Orders" menu. You can see the payment and delivery status from this dashboard.

1. Go to the "Orders" menu.
2. Click on "Orders." The order dashboard will appear. You can see all your sales orders and their statuses as in this picture.

#	Date	Order	Customer	Sales channel	Shipping date	Amount	Status	Payment	⋮
1	Today	SO-2020010006	BB Shop	Agent	<input type="button" value="Edit"/>	6,000	Pending	Unpaid	⋮
2	Today	SO-2020010005	Hana Kim	Lazada	<input type="button" value="Edit"/>	30,000	Pending	Partial	⋮
3	Today	SO-2020010004	ABC Co. Ltd.	Agent	<input type="button" value="Edit"/>	28,500	Completed	Paid	⋮
4	Today	SO-2020010003	Sam Orr	Lazada	<input type="button" value="Edit"/>	27,000	Completed	Paid	⋮
5	Today	SO-2020010002	All You Need Store	Facebook	<input type="button" value="Edit"/>	142,500	Completed	Paid	⋮

### Remarks:

#### Status

- Completed : The ordered item(s) has been deducted from the stock.
- Partial : Some of the ordered items have been deducted from the stock.
- Pending : The ordered tem(s) hasn't been deducted from the stock yet.
- Cancelled : The order has been cancelled.

#### Payment

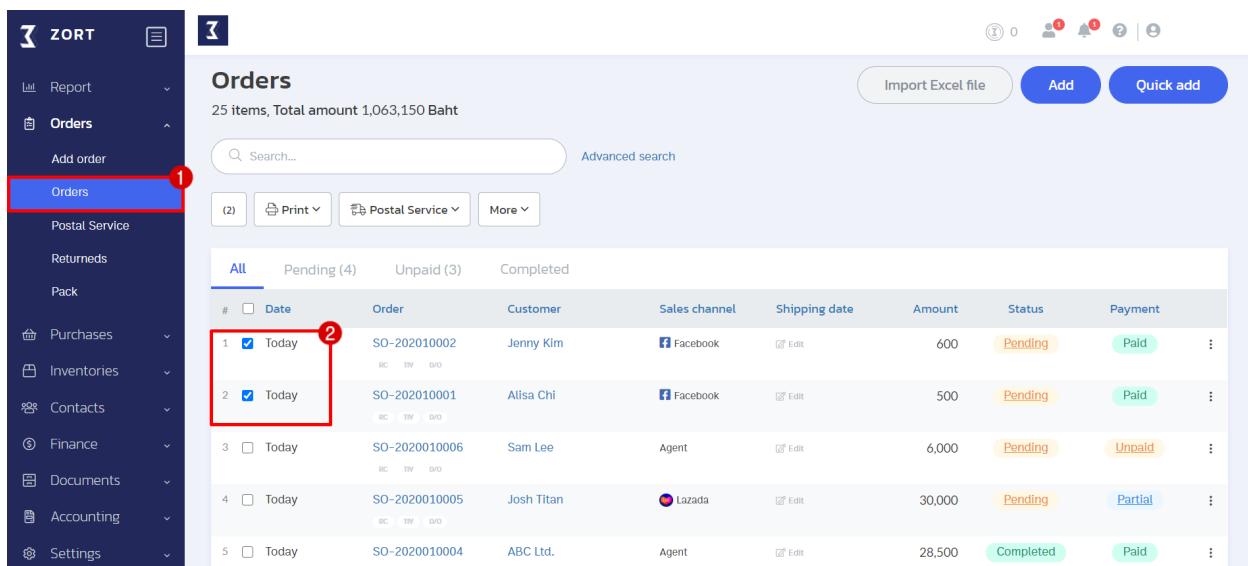
- Paid : The full amount has been paid.
- Partial : Only some of the amount has been paid.
- Pending : Waiting for the payment.
- Cancelled : The payment has been cancelled.

# Shipping Items

## Shipping Items on ZORT

You can select a shipping carrier that suits your business needs directly from the ZORT system, where customers' info can be automatically extracted and put together in the recipient section.

1. Go to the "Orders" menu and click on "Orders."
2. Select the sales order that you would like to ship out. (Multiple shipments)

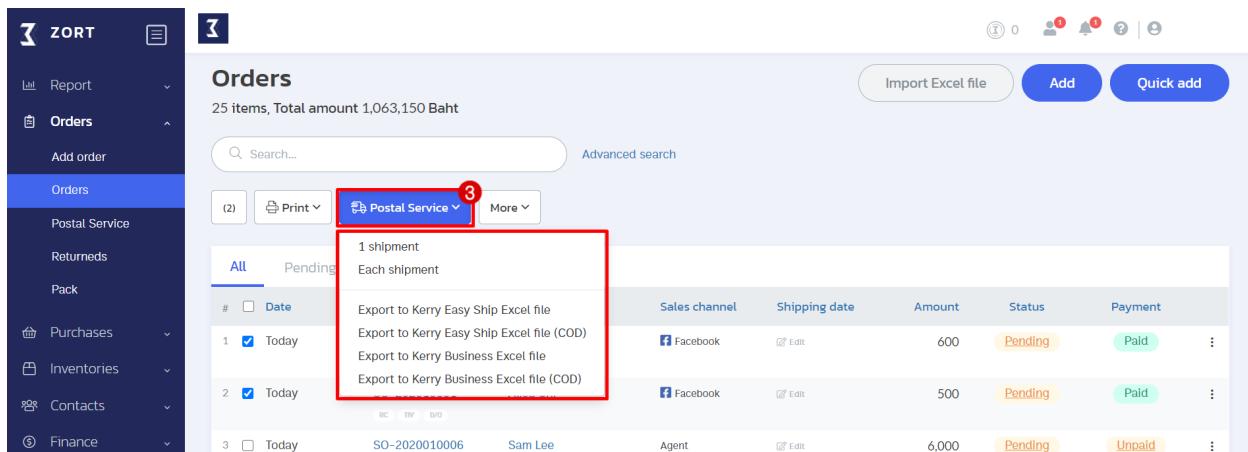


The screenshot shows the ZORT Orders interface. The left sidebar has 'Orders' selected. The main area displays a list of orders with columns for Order ID, Customer, Sales channel, Shipping date, Amount, Status, and Payment. Two specific orders are highlighted with a red box and labeled with a red '2': SO-202010002 and SO-202010001. Both of these orders have the 'Today' date selected.

#	Date	Order	Customer	Sales channel	Shipping date	Amount	Status	Payment
1	<input checked="" type="checkbox"/> Today	SO-202010002	Jenny Kim	Facebook	<input type="button" value="Edit"/>	600	Pending	Paid
2	<input checked="" type="checkbox"/> Today	SO-202010001	Alisa Chi	Facebook	<input type="button" value="Edit"/>	500	Pending	Paid
3	<input type="checkbox"/> Today	SO-2020010006	Sam Lee	Agent	<input type="button" value="Edit"/>	6,000	Pending	Unpaid
4	<input type="checkbox"/> Today	SO-2020010005	Josh Titan	Lazada	<input type="button" value="Edit"/>	30,000	Pending	Partial
5	<input type="checkbox"/> Today	SO-2020010004	ABC Ltd.	Agent	<input type="button" value="Edit"/>	28,500	Completed	Paid

3. Click on "Postal Service."

You can either choose to manage all items as one shipment or ship out each sales order separately.



The screenshot shows the ZORT Orders interface with the 'Postal Service' dropdown menu open. The '1 shipment' option is highlighted with a red box and labeled with a red '3'. Below the dropdown, there are options for 'Export to Kerry Easy Ship Excel file', 'Export to Kerry Easy Ship Excel file (COD)', 'Export to Kerry Business Excel file', and 'Export to Kerry Business Excel file (COD)'.

#	Date	Order	Sales channel	Shipping date	Amount	Status	Payment	
1	<input checked="" type="checkbox"/> Today	SO-202010002	Facebook	<input type="button" value="Edit"/>	600	Pending	Paid	
2	<input checked="" type="checkbox"/> Today	SO-202010001	Facebook	<input type="button" value="Edit"/>	500	Pending	Paid	
3	<input type="checkbox"/> Today	SO-2020010006	Sam Lee	Agent	<input type="button" value="Edit"/>	6,000	Pending	Unpaid

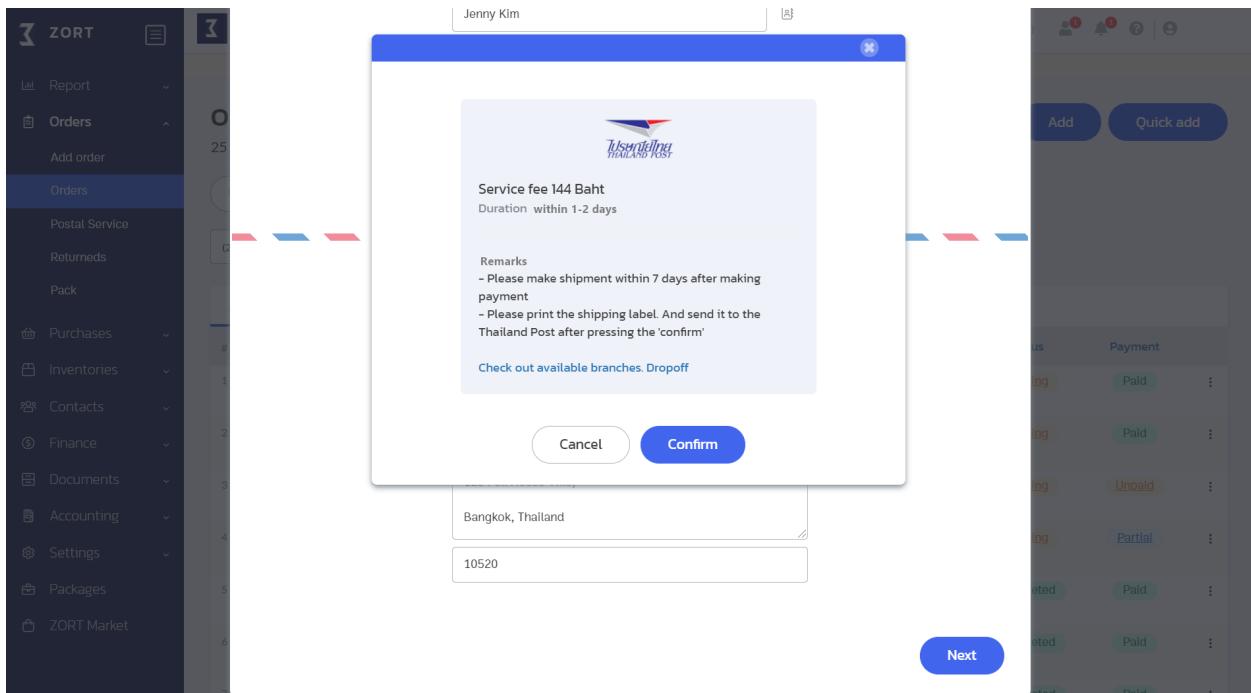
#### 4. Select the shipping carrier you want.

The screenshot shows the ZORT software interface with the 'Orders' menu selected. In the center, there's a section titled 'Postal Service (1 shipment)' with a sub-section 'Postal service'. It lists several shipping options with their respective logos and descriptions. The 'Thailand Post - Dropoff EMS' option is highlighted with a blue border around its logo and description.

#### 5.) Fill in all necessary details and click on "Next."

The screenshot shows the ZORT software interface with the 'Orders' menu selected. It displays two main sections for entering shipping details: 'Sender info' and 'Recipient info'. The 'Sender info' section contains fields for shop name, phone number, address, ZIP code, and promotion code. The 'Recipient info' section contains fields for order ID, weight, name, phone number, address, and ZIP code. A progress bar at the bottom indicates the steps completed in the process.

6.) The system will calculate the shipping fees. Check the details and click on "Confirm."



#### Remarks:

- For Thailand Post (EMS, Registered) and NINJA VAN, payments can be made directly on ZORT.
- For FlashExpress, you will be asked to pay for your shipmen(s) at the pickup spot.
- For KERRY EXPRESS, you can process your payment at the KERRY counter.
- For J&T EXPRESS, you can process your payment with the courier or at the J&T counter.
- For Sedit COD service, the shipping and service fees will be deducted from the sales order's cost.

## Printing Shipping Labels

You can print shipping labels right from the ZORT system without having to fill in customers' info again.

1. Go to the "Orders" menu and click on "Orders."

2. Select the sales orders of which shipping labels you want to print out.

The screenshot shows the ZORT application interface. On the left, a sidebar menu is open with 'Orders' selected (marked with a red box and number 1). In the main content area, the 'Orders' section is displayed with the heading 'Orders' and a sub-header '25 items, Total amount 1,063,150 Baht'. Below this is a search bar and a filter section with buttons for '(I)', 'Print', 'Postal Service', and 'More'. A table lists five sales orders, each with columns for Order ID, Customer, Sales channel, Shipping date, Amount, Status, and Payment. The first order is highlighted with a red box and number 2, indicating it is selected for printing.

#	Date	Order	Customer	Sales channel	Shipping date	Amount	Status	Payment
1	<input checked="" type="checkbox"/> Today	SO-202010002	Jenny Kim	Facebook		600	On hold	Paid
2	<input type="checkbox"/> Today	SO-202010001	Alisa Chi	Facebook		500	On hold	Paid
3	<input type="checkbox"/> Today	SO-202010006	Sam Lee	Agent		6,000	Pending	Unpaid
4	<input type="checkbox"/> Today	SO-202010005	Josh Titan	Lazada		30,000	Pending	Partial
5	<input type="checkbox"/> Today	SO-202010004	ABC Ltd.	Agent		28,500	Completed	Paid

3. Click on "Print" then select "Print shipping label."

This screenshot shows the same ZORT Orders page as above, but with a different focus. The 'Print' button in the toolbar is highlighted with a red box and number 1. A dropdown menu has appeared, listing 'Print' and 'Print shipping label'. The 'Print shipping label' option is also highlighted with a red box and number 2. The rest of the page, including the order list, remains the same.

#### 4. Select the size of the shipping labels.

The screenshot shows the ZORT software interface. On the left, there is a sidebar with various menu items: Report, Orders (selected), Add order, Orders, Postal Service, Returns, Pack, Purchases, Inventories, Contacts, Finance, Documents, Accounting, and Settings. The main area is titled 'Orders' and shows '25 items, Total amount'. A search bar and a 'Print' button are present. Below this is a table with columns: #, Date, Order ID, Customer Name, Source, Status, Edit, Amount, Status, Payment, and More. The table contains five rows of order data. A modal window titled 'Print shipping label : 1' is open in the center. It has a 'Size' section with radio buttons for A5 (selected), A4, Envelope, Sticker 4"x6", and Small. At the bottom of the modal is a blue 'Print shipping label' button. The background of the main interface is dimmed.

#### 5. Once you click on "Print," you will be directed to a print review page where you can see the generated shipping labels as shown below.

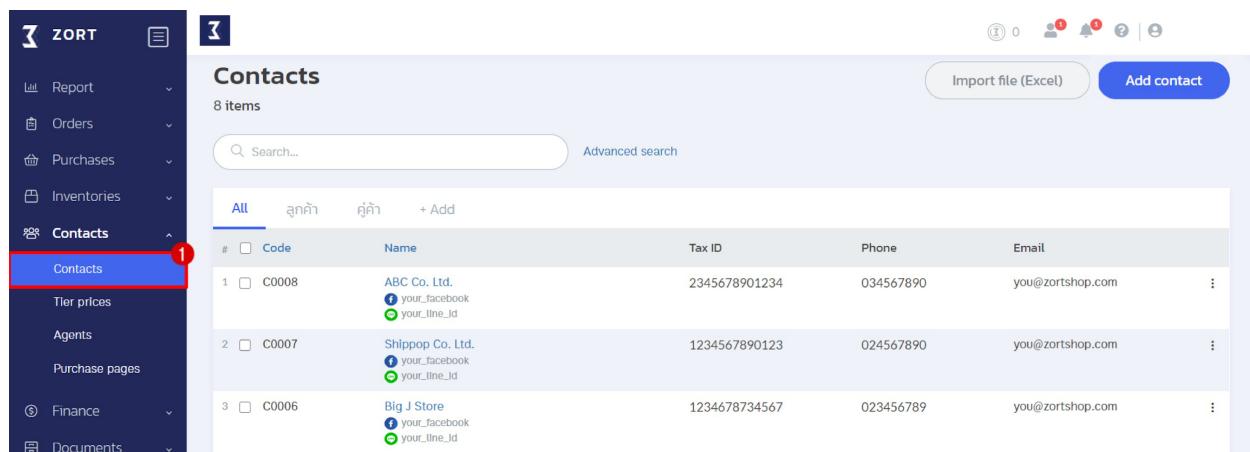
The screenshot shows a print preview page. At the top, there is a 'Print shipping label' button and a 'Display' dropdown menu. The main area is divided into two sections: 'From' and 'To'. The 'From' section contains the text: 'Demo Shop', '128/152 Phayathai Plaza Building 14th Floor, Thung Phayathai, Ratchathewi, BKK 10400', and 'Tel 0987654322'. Below this is a barcode with the text 'SO-20201002'. The 'To' section contains the text: 'Jenny Kim', '123 Pink Area, Prawet, Prawet, BKK 10250', and 'Tel 087674333'. The background of the main interface is visible behind the print preview.

# Contacts

## Adding Contacts

Whenever a transaction is made on ZORT, the information of the customer/contact will be automatically saved in the system. Alternatively, if your store already has a contact list, you can import it into the system by following the steps below.

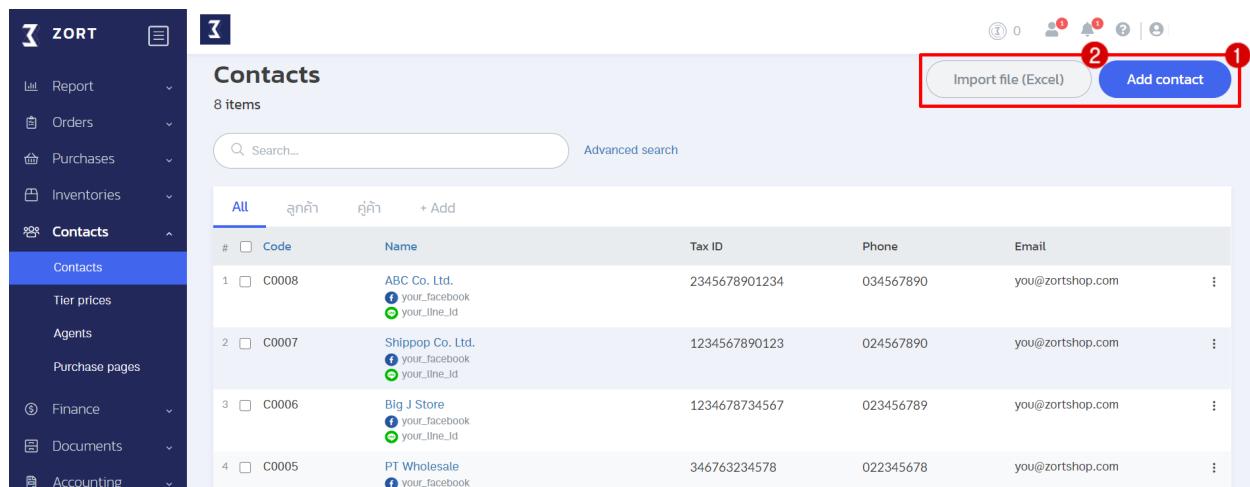
### 1. Go to the "Contacts" menu and select "Contacts."



The screenshot shows the ZORT application interface. On the left, there is a vertical sidebar with various menu items: Report, Orders, Purchases, Inventories, Contacts (which is highlighted with a blue background and a red circle with the number 1), Tier prices, Agents, Purchase pages, Finance, and Documents. The main content area is titled 'Contacts' and shows a list of 8 items. At the top right of this area are buttons for 'Import file (Excel)' and 'Add contact'. Below the title, there is a search bar and an 'Advanced search' link. The list table has columns for #, Code, Name, Tax ID, Phone, and Email. Each row contains a checkbox, a code (e.g., C0008, C0007, C0006), a name (e.g., ABC Co. Ltd., Shippop Co. Ltd., Big J Store), a tax ID, a phone number, an email address, and a more options button (three dots). Below each name, there are small icons for Facebook and Line.

There are 2 possible ways to add contacts:

1. Adding one contact at a time. (Add contact)
2. Importing contacts from an Excel file (Import file (Excel)).



This screenshot is similar to the previous one, showing the 'Contacts' menu selected. However, the 'Import file (Excel)' button and the 'Add contact' button at the top right of the 'Contacts' list are now highlighted with a red border and a red circle with the number 2. The rest of the interface, including the sidebar and the contact list, remains the same.

## 1.Adding one contact at a time. (Add contact)

To add one contact at a time, fill in all the necessary details. Once you finish, click on "Save."

## 2. Importing contacts from an Excel file (Import file (Excel)).

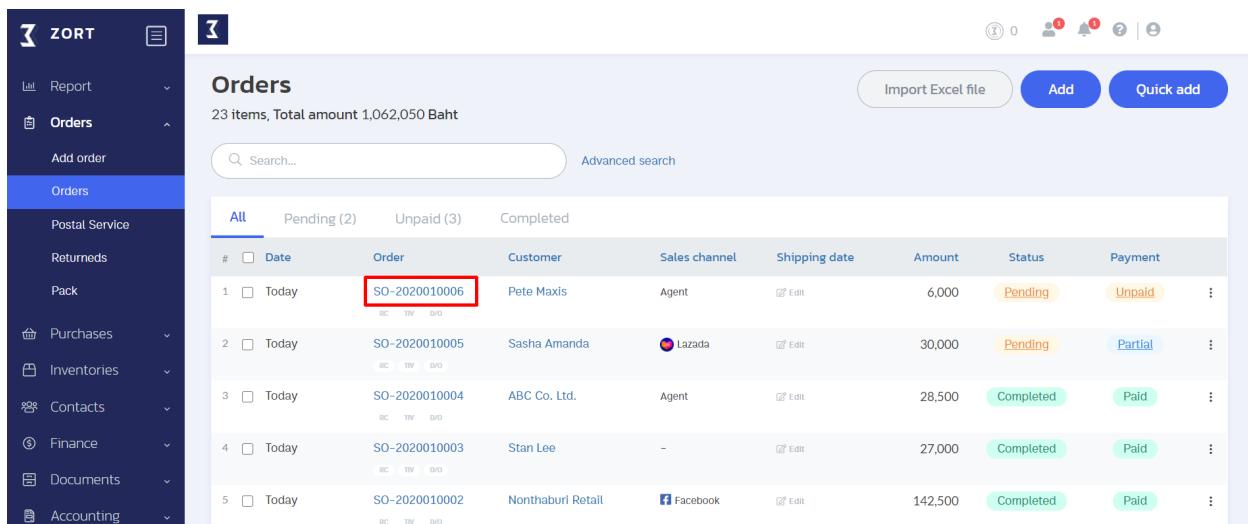
To import contacts from an Excel file, you have to download a template from the ZORT system in order to import the contact information in a valid format.

# Documents

## Printing Documents

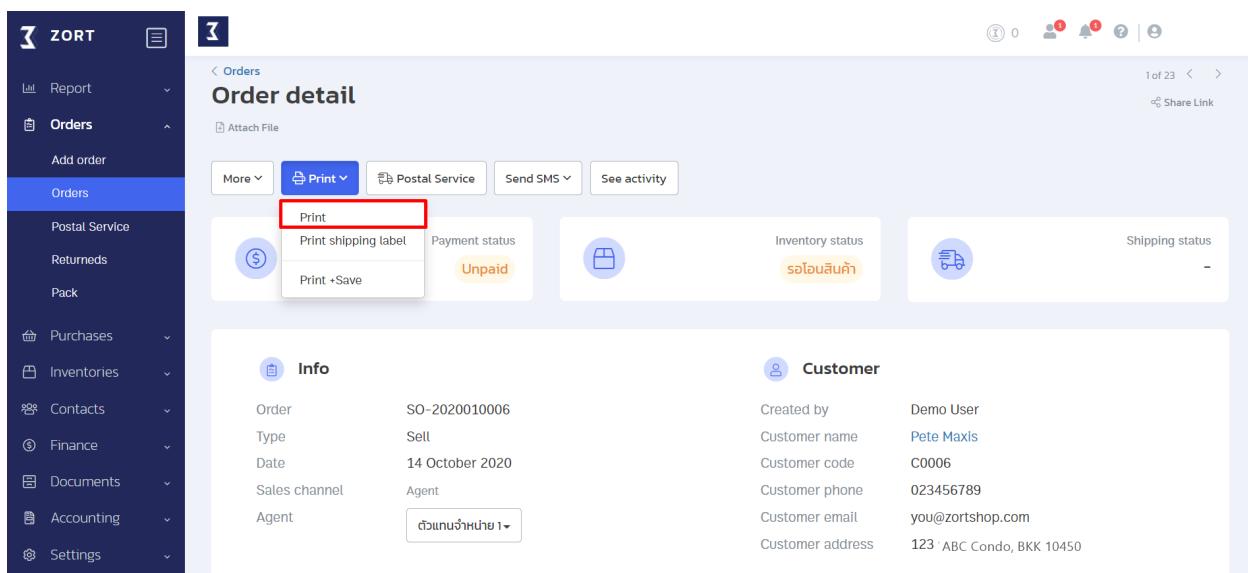
You can print out documents related to transactions such as tax invoice, quotation, etc.

1. Select the item(s) of which document you would like to print out (You can either select from sales orders or purchase orders.).



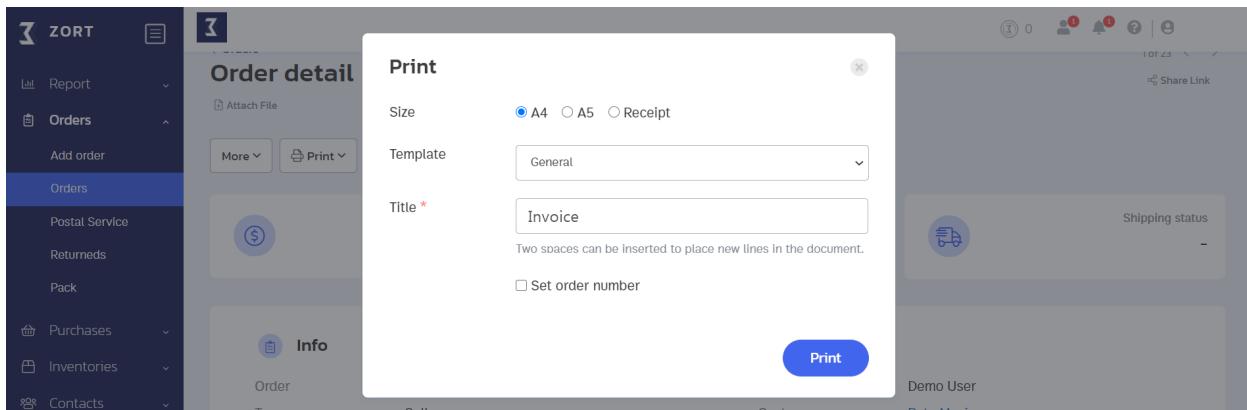
#	Date	Order	Customer	Sales channel	Shipping date	Amount	Status	Payment
1	Today	SO-2020010006	Pete Maxis	Agent	<input type="button" value="Edit"/>	6,000	Pending	Unpaid
2	Today	SO-2020010005	Sasha Amanda	Lazada	<input type="button" value="Edit"/>	30,000	Pending	Partial
3	Today	SO-2020010004	ABC Co. Ltd.	Agent	<input type="button" value="Edit"/>	28,500	Completed	Paid
4	Today	SO-2020010003	Stan Lee	-	<input type="button" value="Edit"/>	27,000	Completed	Paid
5	Today	SO-2020010002	Nonthaburi Retail	Facebook	<input type="button" value="Edit"/>	142,500	Completed	Paid

2. Click on "Print" and select "Print."



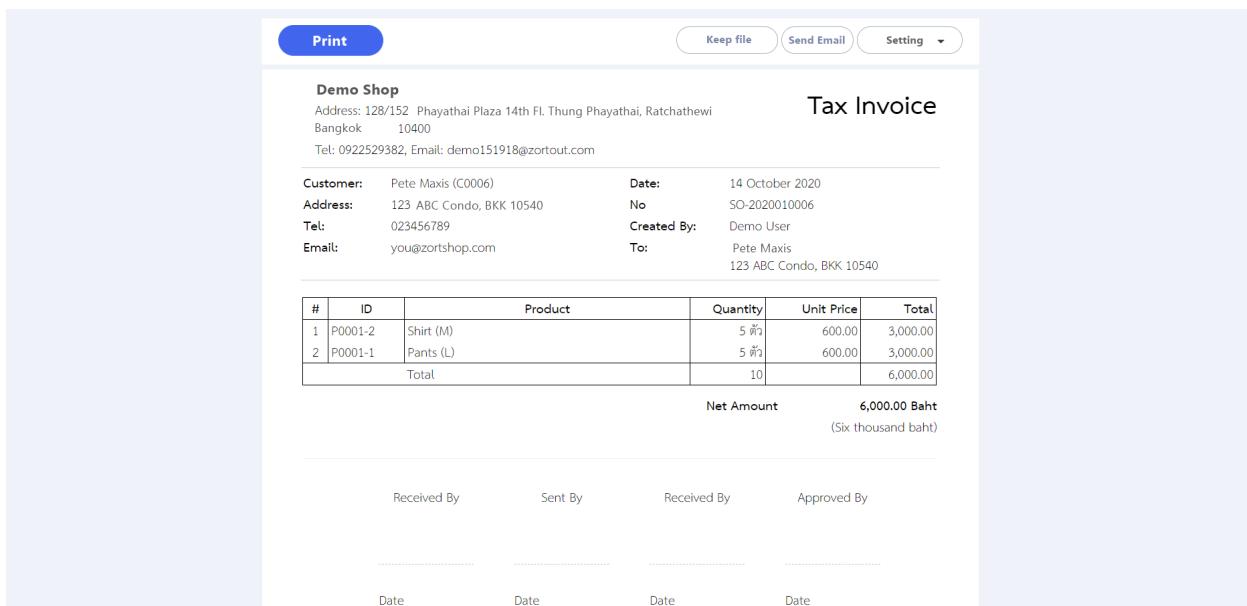
Info	Customer
Order: SO-2020010006	Created by: Demo User
Type: Sell	Customer name: Pete Maxis
Date: 14 October 2020	Customer code: C0006
Sales channel: Agent	Customer phone: 023456789
Agent: ลิว鞭เจ้าหน่าย 1	Customer email: you@zortshop.com
	Customer address: 123 ABC Condo, BKK 10450

### 3. Choose the size, format, and title of your document.

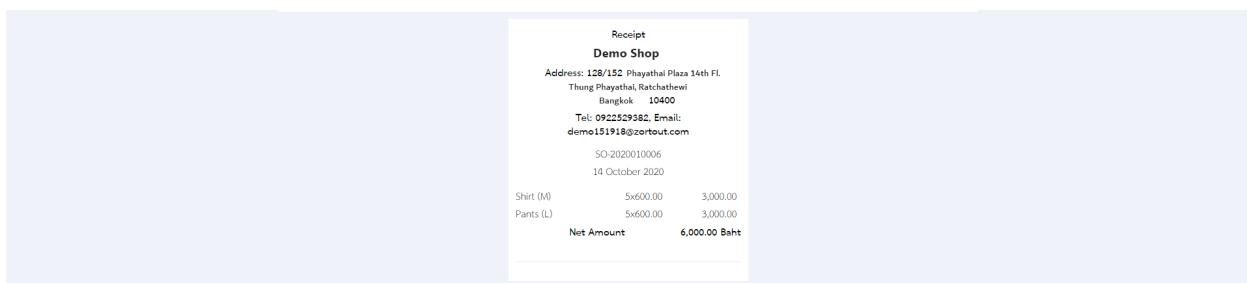


### 4. Click on "Print."

Once you click on "Print," you will see a print preview of your document as shown in the picture. You can either choose to print out the document or send it to your customer via email from this page.



### Sample receipt

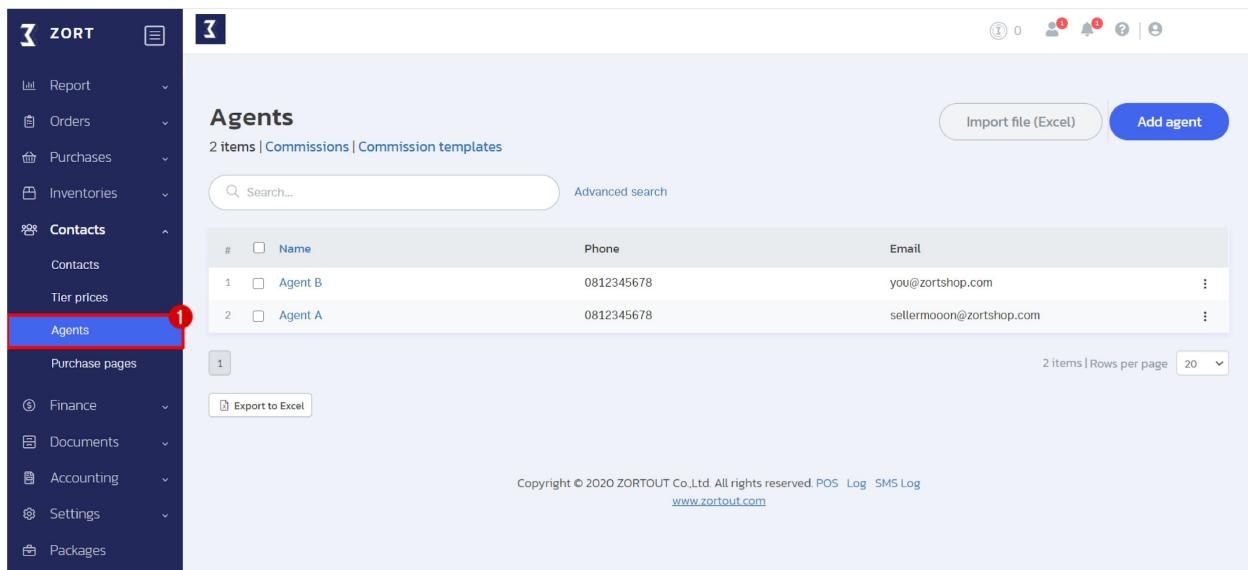


# Sales Agents

## Adding Sales Agents

To get started with the dropshipping features, firstly, you have to add sales agents into the database. Follow the steps below.

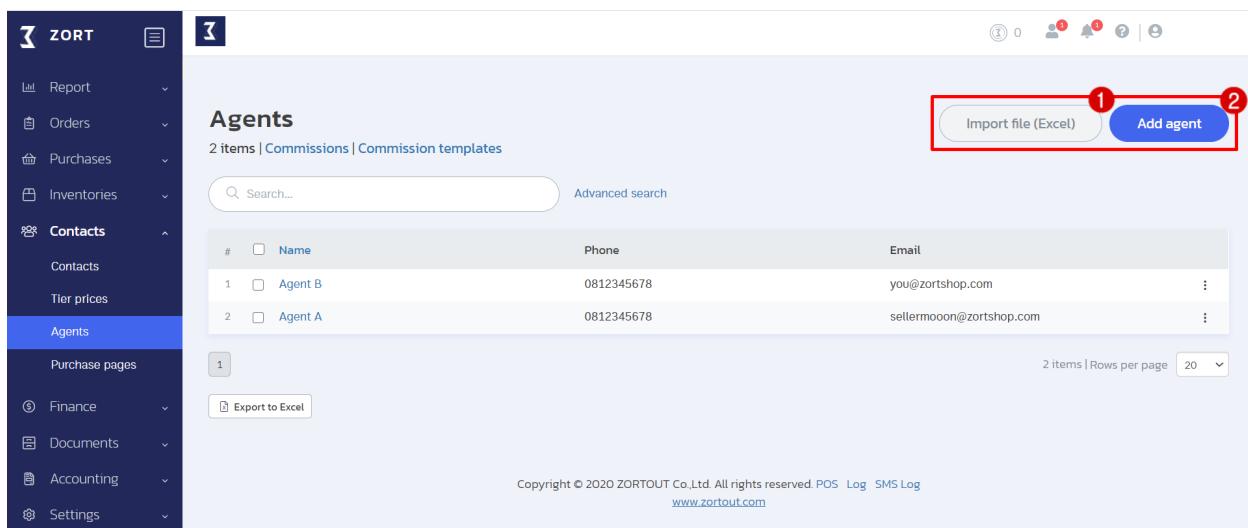
1. Go to the "Contacts" menu and select "Agents."



The screenshot shows the ZORT software interface. On the left, there is a vertical sidebar with a dark blue header containing the word 'ZORT'. Below the header, the sidebar has several categories: Report, Orders, Purchases, Inventories, Contacts (which is expanded), Tier prices, Agents (highlighted with a red box and a red number '1'), Purchase pages, Finance, Documents, Accounting, Settings, and Packages. The main content area is titled 'Agents' and shows a list of two items: 'Agent B' and 'Agent A'. Each item has a checkbox next to its name, a phone number, and an email address. At the top right of the main area, there are buttons for 'Import file (Excel)' and 'Add agent'. Below the table, there is a search bar, an 'Advanced search' link, and a copyright notice at the bottom.

There are 2 possible ways to add sales agents:

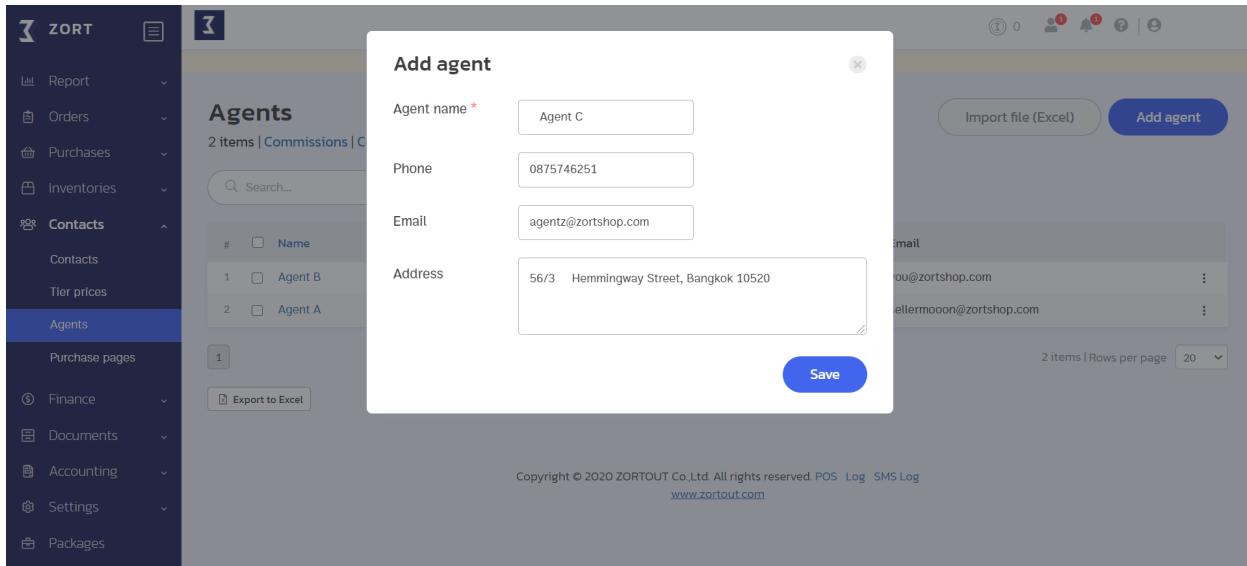
1. Adding one sales agent at a time (Add agent).
2. Importing sales agents from an Excel file (Import file (Excel)).



This screenshot is identical to the one above, showing the 'Agents' list in the ZORT software. However, the 'Import file (Excel)' button and the 'Add agent' button are now highlighted with a red box and red numbers '1' and '2' respectively, indicating the two methods for adding agents.

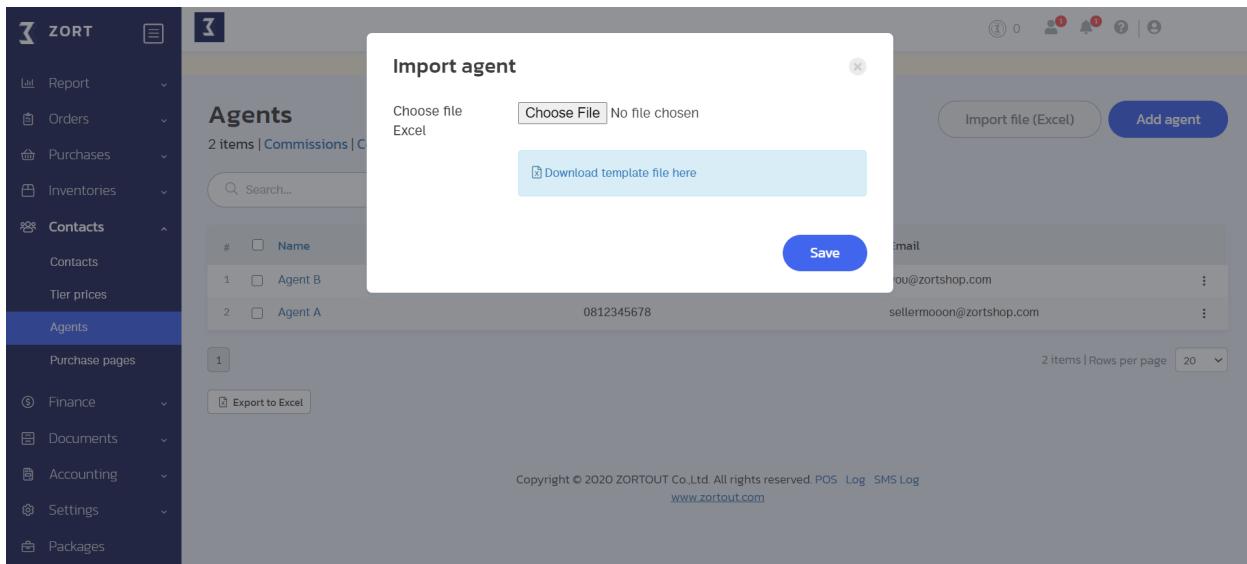
## 1. Adding one sales agent at a time (Add agent).

To add a sales agent, fill in all the necessary details.



## 2. Importing sales agents from an Excel file (Import file (Excel)).

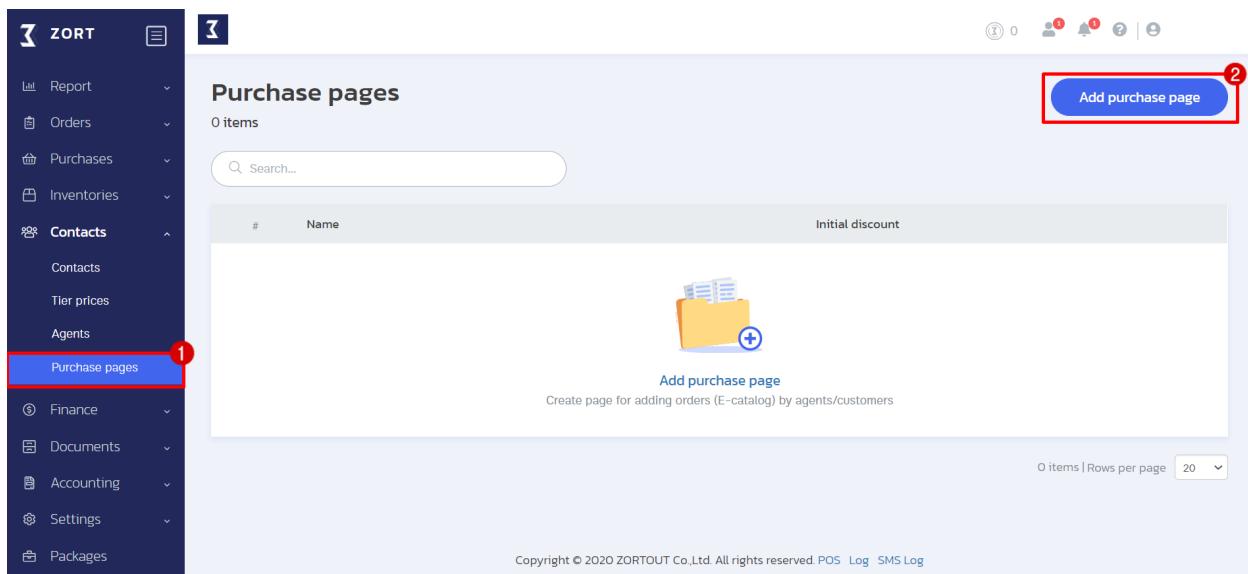
To import sales agents from an Excel file, you have to download a template from the ZORT system in order to import the sales agent information in a valid format.



## Creating Purchase Pages

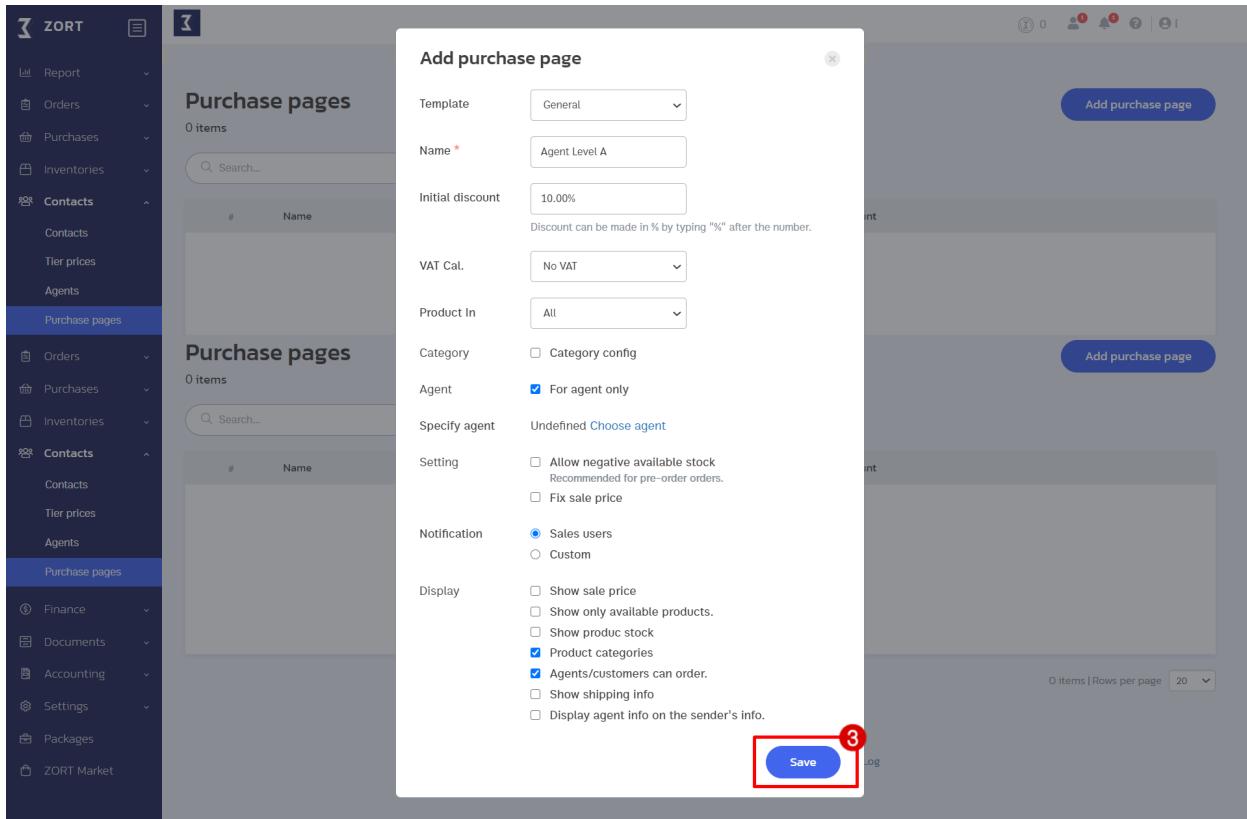
To share the number of items in your inventory with your sales agents and allow them to check item availability or book/buy items by themselves, you need to create a purchase page. You can also control the visibility of inventory information for each of your sales agents.

1. Go to the "Contacts" menu and select "Purchase Page."
2. Click on "Add purchase page."

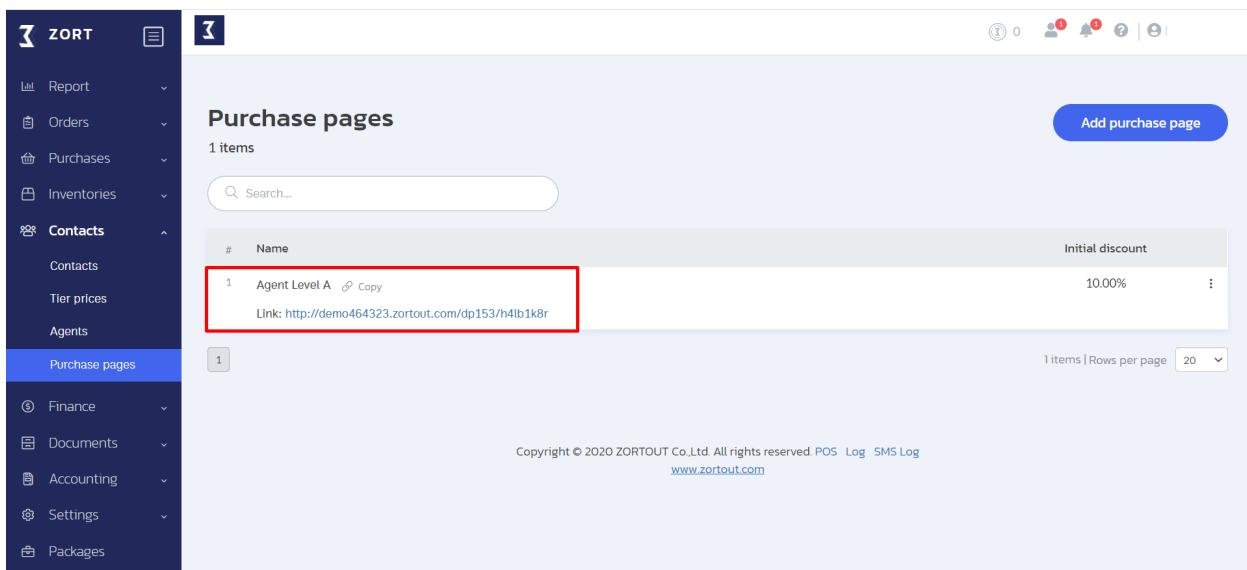


3. Set up the purchase page.

- Set up a distinguishable name for the new sales page. It's recommended that you specify the discounts or tiers in the name, e.g., "Agent Level 1" or "Agent Level 2."
- Define the initial discount for the sales agents to be using this purchase page.
- Set up other necessary details, then click on "Save."



Once you save your setting, a special hyperlink will be created. You can copy the link and send it to a particular sales agent according to their discount offer.



## Sample purchase page

Demo Shop

Products

All | [Clothing](#) | [Furniture](#)

Search... Search

Product 8 items grid

Image	Name	Size	SKU	Add to cart
	Shirt (M)	M	P0001-2	<a href="#">Add to cart</a>
	Shirt (S)	S	P0001-1	<a href="#">Add to cart</a>
	Shirt (L)	L	P0001-3	<a href="#">Add to cart</a>
	Shirt (XL)	XL	P0001-4	<a href="#">Add to cart</a>
	Shirt (XXL)	XXL	P0001-5	<a href="#">Add to cart</a>
	Shirt (XXXL)	XXXL	P0001-6	<a href="#">Add to cart</a>
	Shirt (4XL)	4XL	P0001-7	<a href="#">Add to cart</a>
	Shirt (5XL)	5XL	P0001-8	<a href="#">Add to cart</a>

No data

Checkout

# Settings

## General Settings

1. Go to the "Setting" menu and select "Organisation."

The screenshot shows the 'Organisation Info' page under the 'Organisation' tab in the 'Settings' menu. The left sidebar has a red box around the 'Organization' item, with a red number '1' indicating it. The main content area is titled 'Organisation Info' and contains sections for Program, Document, Shipping channel, SMS, Payment, Bank Info, Accounting documents, and Reset organisation. On the right, there is a section for 'Organisation Info' with fields for Organisation (Demo Shop), Tax ID (11234567898765), Branch name - Main, Branch no - Main (BR001), Address (128/152 Selter Hub Bangkok 10400), Organisation (English), Branch name - Main (English), and Address (English). There is also a placeholder for 'Organisation logo' with a circular icon. The top right corner shows user status icons.

In this page, you can set up the 8 system configurations as follows.

1. Organisation: This information will appear on the documents created by the ZORT system, e.g., tax invoices.
2. Program: This part is for setting your store management such as VAT rates, cost and profit calculation.  
(The default settings are predefined by the system.)
3. Document: This part is for configuring document settings such as order numbers, etc.  
(The default settings are predefined by the system.)
4. Shipping channel: You can select a preferred shipping carrier as your default.
5. SMS: You can set up the automated SMS to be sent to your customers such as order confirmations or tracking numbers.

6. Payment: You can sign-up for a payment gateway service from this page. Once you complete the application, customers will be able to process their payments from the generated hyperlink.
7. Bank Info: If you need a cash on delivery (COD) service, you can send your bank information from this page.
8. Reset Organisation: You can reset all the data on your account such as products, contacts and transactions (only the key user can use this function).

## Setting User Rights

If you have many administrators operating your store, you can grant a specific access level to each one of them according to their role.

- Setting user rights

To manage your users, you need to define their roles in order to grant different access levels to each user type. Users can then access the modules based on their role.

1. Go to the "Settings" menu and select "User rights."
2. Click on "Add user rights."

The screenshot shows the ZORTOUT software interface. On the left, there is a vertical sidebar with a dark blue header containing the 'ZORT' logo and a user icon. Below the header, the sidebar has several menu items: Report, Orders, Purchases, Inventories, Contacts, Finance, Documents, Accounting, Settings (with a dropdown arrow), Profile, Organisation, Users, User rights (which is highlighted with a red box and the number '1'), and Notification. The main content area has a light gray background. At the top right of the main area, there are icons for notifications, messages, and help, along with a search bar and a user profile icon. The main content area has a title 'User rights' and a sub-section '3 items'. It lists three items: 'Name' (Admin, Sales Team, Purchasing Team), each with an 'Edit' link. At the bottom right of the main content area, there is a '3 items | Rows per page' dropdown set to '20'. At the very bottom of the screen, there is a footer with copyright information: 'Copyright © 2020 ZORTOUT Co.,Ltd. All rights reserved. POS Log SMS Log www.zortout.com'.

3. Identify the name, select access levels, and click on "Save."

#### - Assigning User Roles

Once you finish with the user rights set up, you can add users based on their emails used for ZORT login by following the steps below.

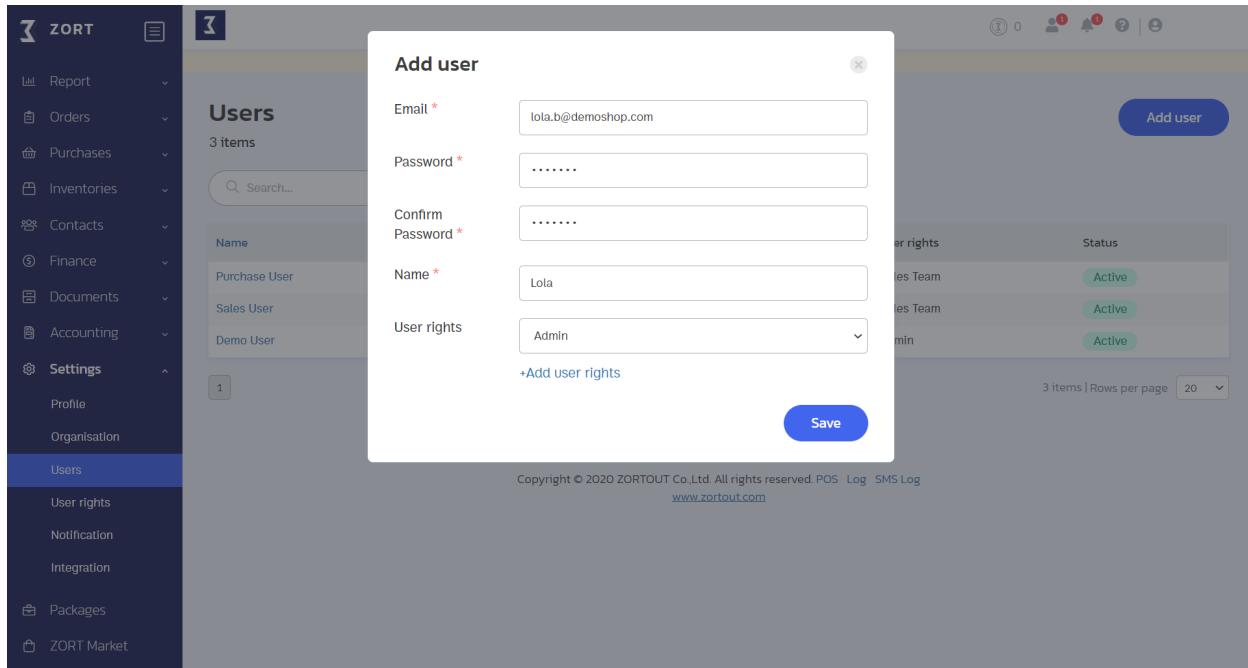
1. Go to the "Settings" menu and select "Users."

2. Click on "Add user."

Name	Registered Date	Last Login	User rights	Status
Purchase User	15 Oct 2020 10:27	None	Sales Team	Active
Sales User	15 Oct 2020 10:27	None	Sales Team	Active
Demo User	15 Oct 2020 10:27	15 Oct 2020 10:27	Admin	Active

3. Enter the email for logging in to ZORT, create a password (this can be changed later) and select the user rights.

4. Click on "Save."



## Other Settings

### 1. Profit Calculation

There are 2 methods for calculating your profit on ZORT:

- 1) Moving Average is a calculation based on the average cost price of each batch.
- 2) FIFO (First In First Out) is a calculation method based on the actual cost of the items that are purchased and sold first.

1. Go to the "Settings" menu and select "Organisation."

2. Click on "Program."

The screenshot shows the ZORT software interface. On the left, there is a vertical navigation menu with a dark blue background. The 'Settings' section is expanded, and the 'Organisation' item is highlighted with a red box and a red number '1'. To its right, the main content area has a light gray background. A red box highlights the 'Program' tab in the top navigation bar of the content area, with a red number '2' above it. The 'Program' section contains several configuration options:

- Inventory Info**:
  - Default warehouse/branch: Main Warehouse
- Product**:
  - Allow negative current stock
  - Allow negative available stock
  - Edit completed transaction
  - Due date (Default)
  - Notification
- Notification**: Minimum stock notification: 5

3. Click on the preferred profit calculation method.

The screenshot shows the ZORT software interface. The left navigation menu is identical to the previous screenshot, with 'Organisation' selected and highlighted with a red box and a red number '1'. The main content area shows the 'Calculation' section. A red box highlights the 'Profit Calculation' section, which contains the following options:

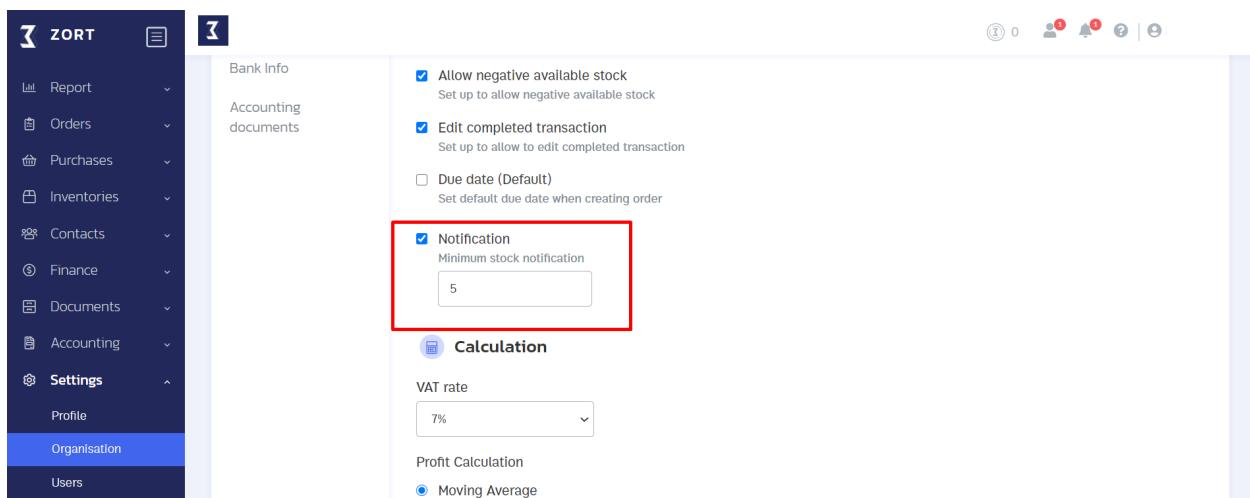
- Moving Average**: Calculate by moving average. (Calculate when products have been transferred.)
- FIFO**: Calculate by FIFO (Calculate when products have been transferred.)
- Allocate discount to cost/profit
- Set up profit calculation based on transaction date

A red box surrounds the last option, 'Set up profit calculation based on transaction date', with a note below it: "Usually the ZORT system calculates profit based on the date of product transfer."

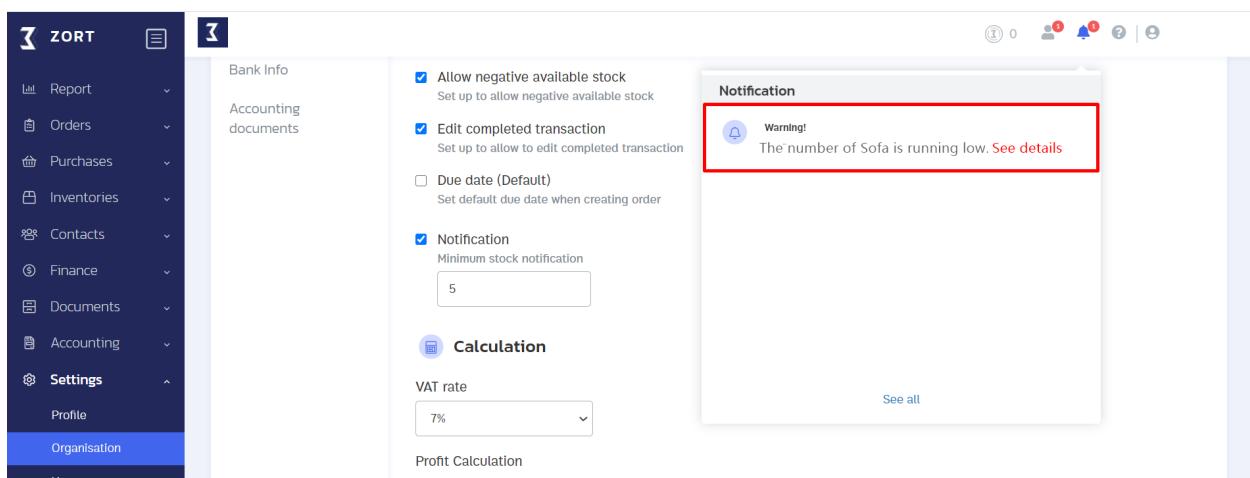
## 2. Low Stock Alert Setting

If your store has a long restocking lead time, you might lose so many opportunities to sell your items before the new batch arrives. Therefore, it's recommended that you set up a minimum quantity for low stock alerts by following the steps below.

1. Go to the "Setting" menu and select "Organisation."
2. Click on "Program."
3. Check the "Notification" box and specify the quantity for your reorder point.



4. After this setting, whenever your item quantity drops below the reorder point, you will get notifications as shown in the picture below.



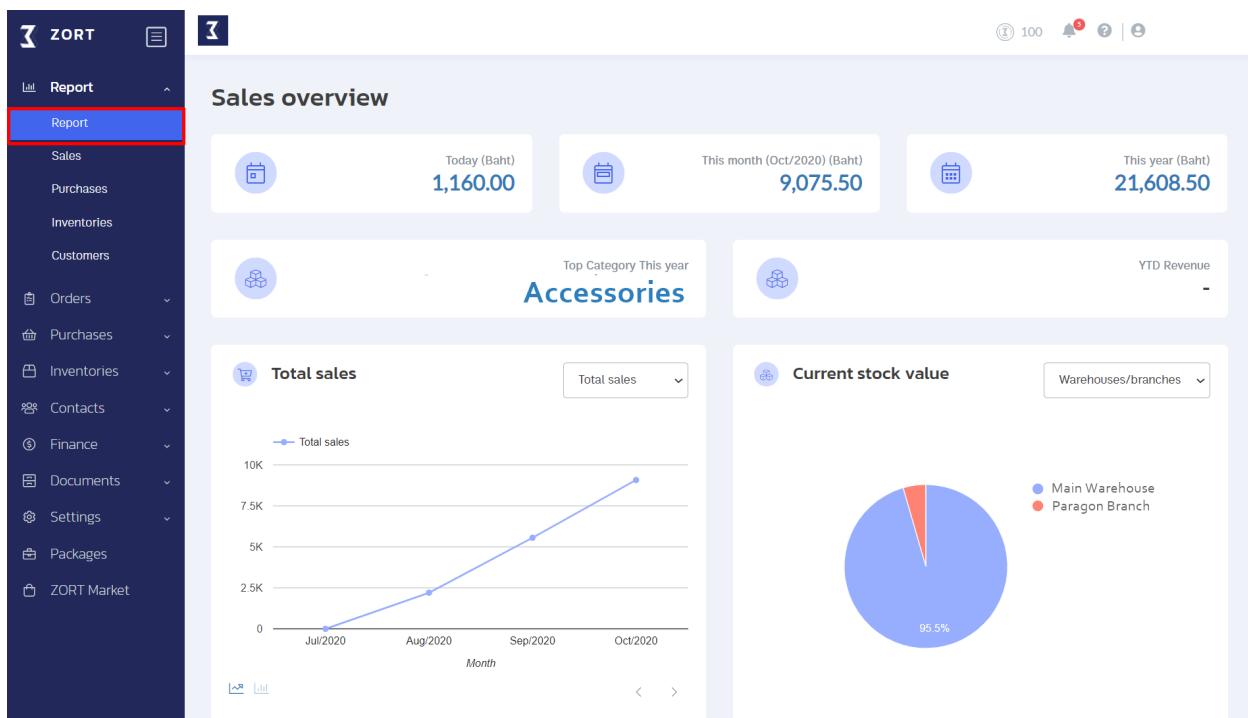
# Reports

## Overall Report

After transactions take place on ZORT, the system will analyze all the data and create insightful reports which can be accessed based on topics. You can also export these data in an Excel file for your further use.

To see reports

1. Go to the "Report" menu and click on "Report."



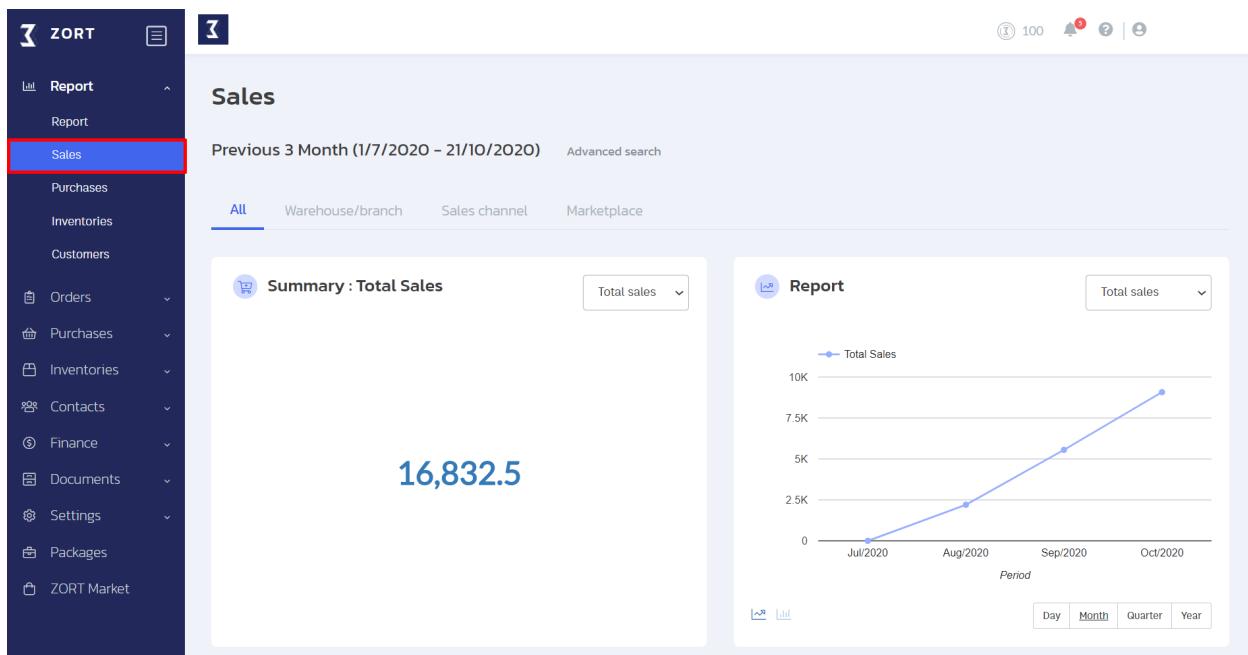
You see reports on your business based on these following topics:

1. Sales report
2. Purchase report
3. Inventory report
4. Customer report

## Sales Report

- See your sales and profit summary and track your business progress with the graph generated.
- See percentage of your sales based on product categories and gain insight on your best selling items.

1. Go to the "Report" menu and click on " Sales."



## Inventory Report

- See the summary report for the net value of your inventory. You can also export your inventory data to check the remaining quantity, item value, and item location.
- See the unsold product report to manage dead stocks that haven't been sold over the past 3 months or more.
- See the low stock report to reorder your inventory right in time.
- See the lots near expiry report to manage your inventory effectively.

1. Go to the “Report” menu and select “Inventories.”

The screenshot shows the ZORT software interface. On the left, a sidebar menu is open under the "Report" section, with "Inventories" selected. The main content area is titled "Inventories". It features two main sections: "Summary : All stock value" which displays a total value of "338,400 Baht" and a "Download Excel" button; and "Current stock value" which is represented by a pie chart showing that 95.5% of the stock is at the Main Warehouse and 4.5% is at Paragon Warehouse. Below these are sections for "Unsold products" and a search bar.

## Customer Report

- The customer report dashboard shows the ratio of new customers and repeat customers in the forms of pie charts, line charts, maps, and percentages.
- You can see the summary of locations of your customers from the data stored in ZORT.

1. Go to the “Report” menu and select “Customers.”

The screenshot shows the ZORT software interface. On the left, a sidebar menu is open under the "Report" section, with "Customers" selected (indicated by a red box and a number 1). The main content area is titled "Customer" and shows a pie chart of customer types: 33.3% New customer and 66.7% Repeat customer. To the right is a line chart titled "Trend" showing sales over time from June to September 2020, with categories for New customer, Repeat customer, and Undefined. A dropdown menu for "Sales" is open above the chart. At the bottom, there are buttons for "Day", "Month", "Quarter", and "Year".

# Integrations

ZORT can integrate with sales channels and other management platforms by following the steps below.

1. Go to the “Settings” menu and click on “Integration.”
2. Click on “Add integration.”

The screenshot shows the ZORT application interface. On the left, there is a vertical navigation menu with various options like Report, Orders, Purchases, Inventories, Contacts, Finance, Documents, Accounting, Settings, Profile, Organisation, Users, User rights, Notification, and Integration. The 'Integration' option is highlighted with a red box and a red number '1'. At the top right, there is a header with user icons and a search bar. Below the header, the main content area has a title 'Integration' and a sub-header '4 items | API Reference'. There are four sections: Marketplace, Website, Accounting, and Fulfilment. Each section contains a list of integration providers. In the Marketplace section, 'Lazada' is listed. In the Website section, 'WooCommerce' is listed. In the Accounting section, 'Accrevo' is listed. In the Fulfilment section, 'Siam Outlet' is listed. At the bottom right of the main content area, there is a blue button labeled 'Add integration' with a red box and a red number '2' around it. At the very bottom of the screen, there is some copyright information and a website URL.

The integrations on ZORT are divided into four categories:

- Marketplace
- Social Commerce
- Website
- Accounting
- Fulfilment

This screenshot shows a modal window titled 'Add integration' over the main ZORT interface. The modal has tabs for Marketplace, Social, Website, Accounting, and Fulfilment, with 'Marketplace' selected. Inside the modal, there is a list of providers under the 'Marketplace' tab, including Lazada, Shopee, JD Central, and Social. Next to each provider name is a dropdown menu labeled 'Type' with 'Lazada' selected. Below the provider list is a large orange button with the Lazada logo and the text 'Connect Lazada'.

## **Contact Us**

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