

# 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.

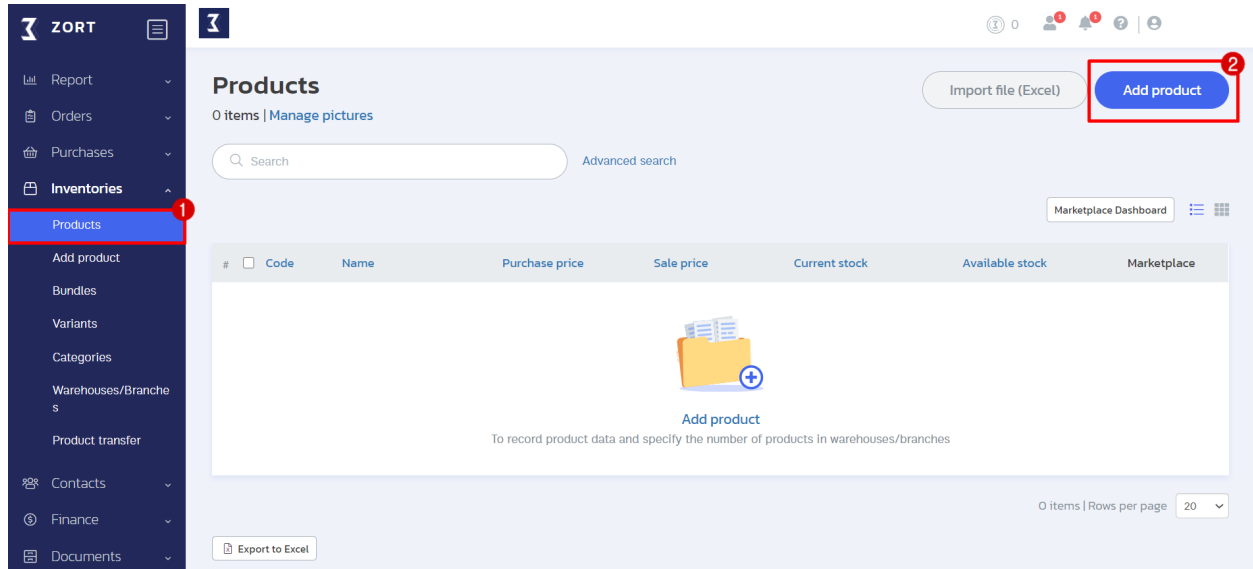


# Products

## Creating Products

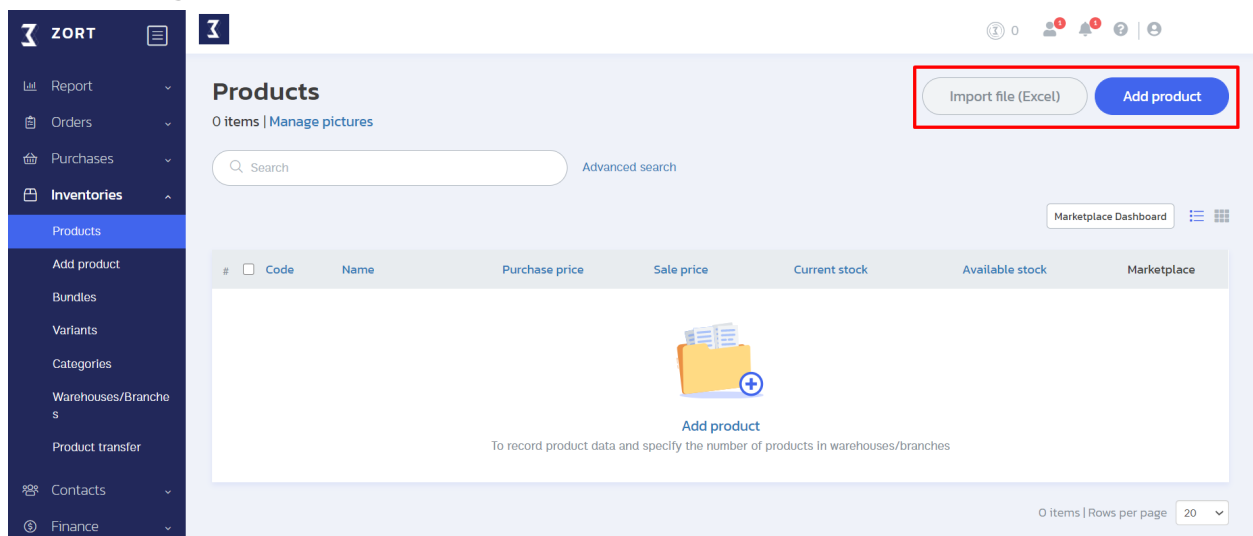
To get started, the first step is to add products to your inventory by following the steps below.

1. Go to the "Products" menu.



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)).



## 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

<

Add product

Product detail

Attribute

No variant

Code

P0010

Name \*

Wooden Chair

Category

Furniture & Home decoration

+Add category


Unit

piece

Barcode

Copy from product code

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

ก๊อ

Save + Add another

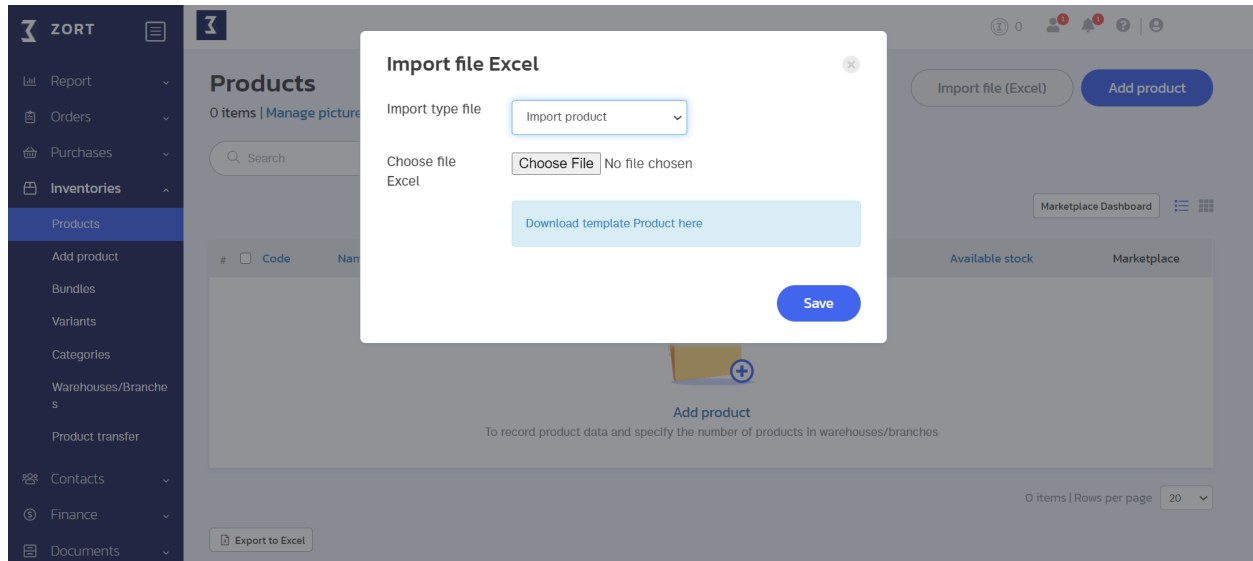
Save

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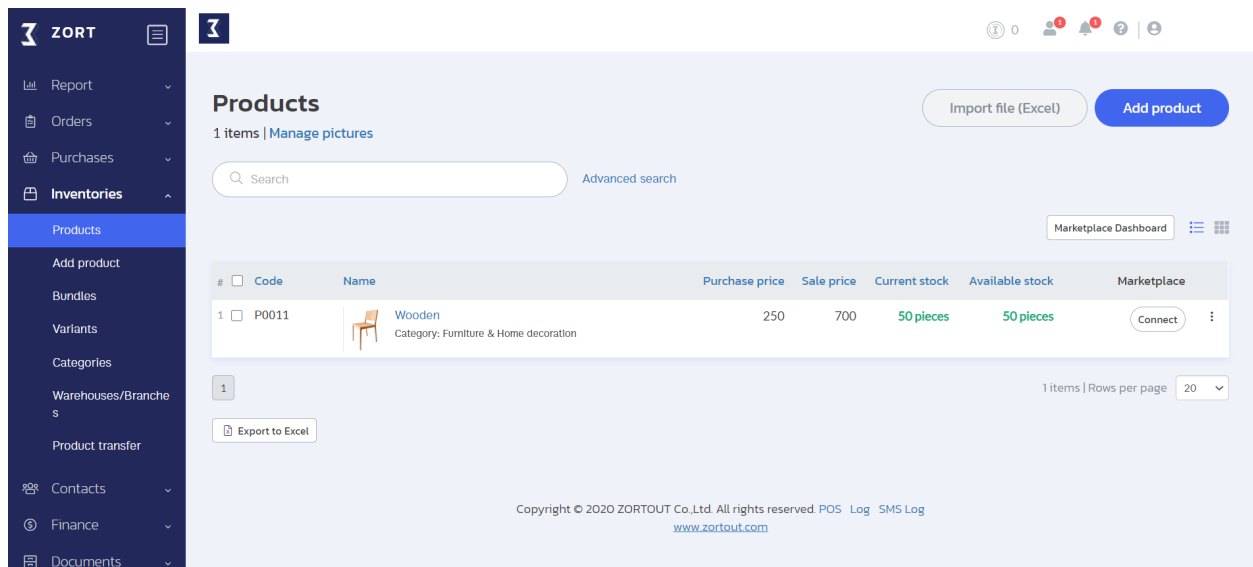
[www.zortout.com](http://www.zortout.com)

## 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.



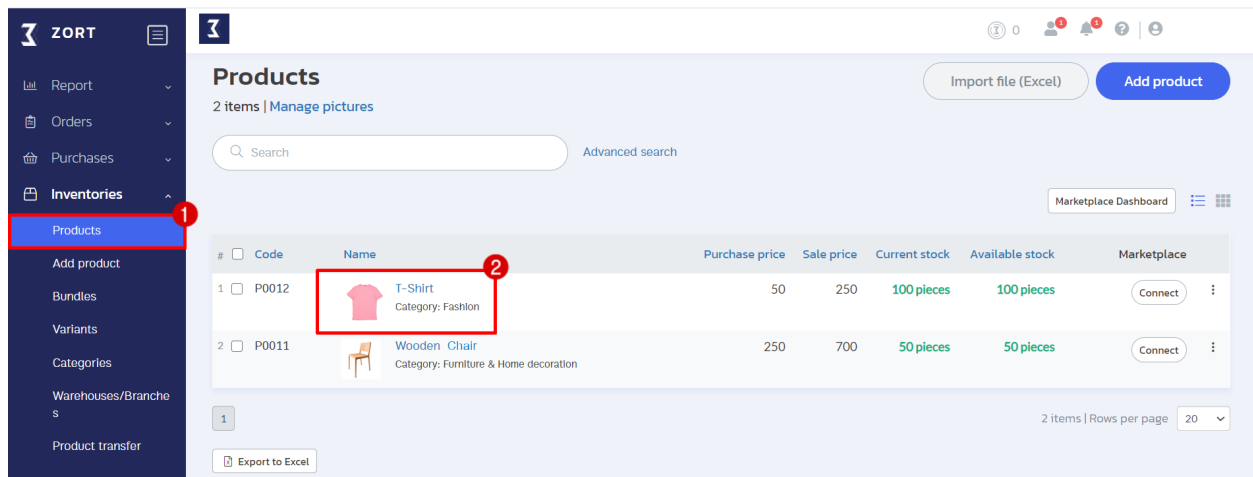
Once you complete filling in all the required information, click on "Save." Your recently created product will appear as in this picture.



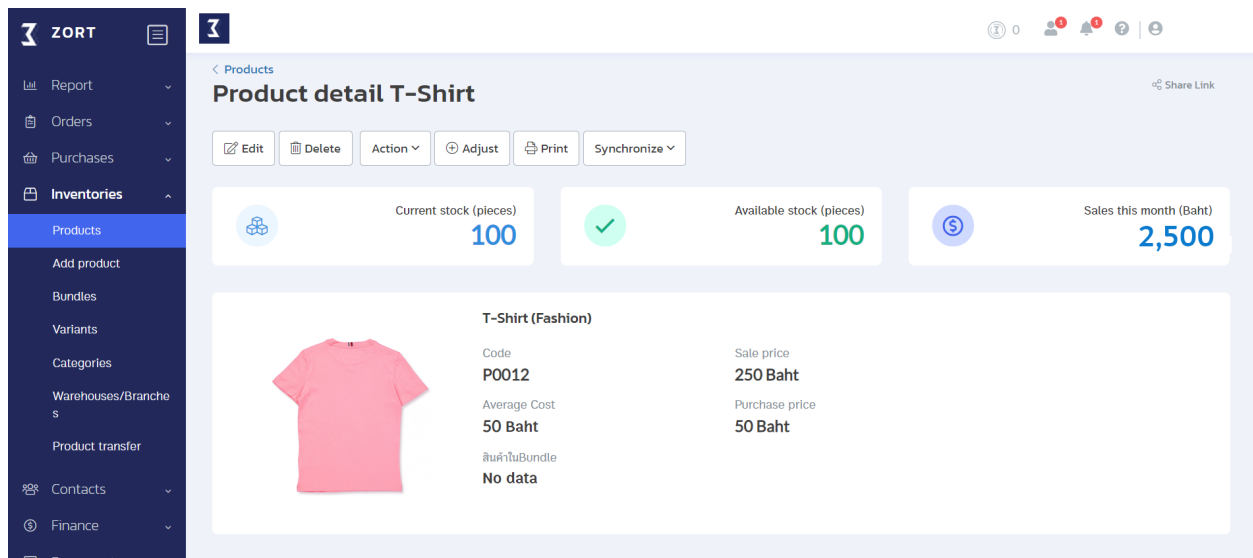
# Viewing Product Details

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 product details will appear as in the picture.

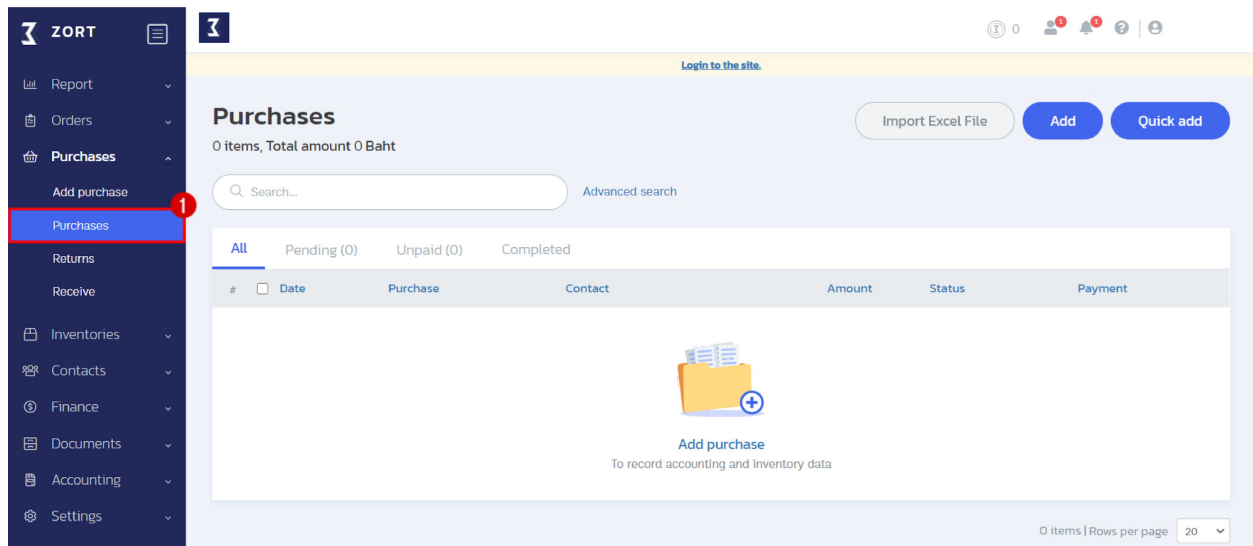


# Purchase Orders

## Creating Purchase Orders

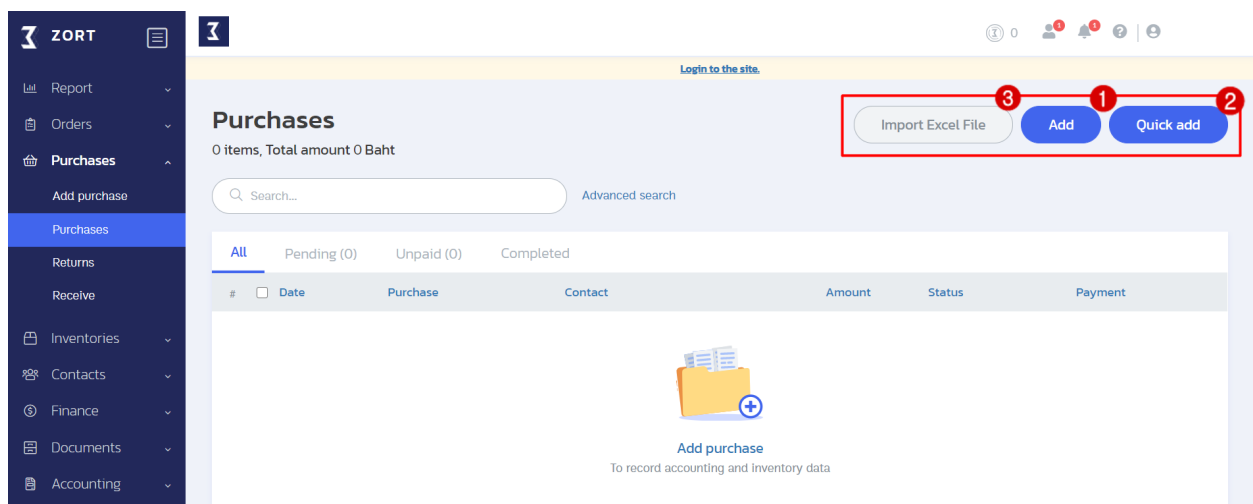
After you set up your inventories, you can input the stock quantity and record your purchase history in order to have the ZORT system calculate costs and profits of each item.

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



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).



## 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.

**ZORT**

**Add purchase**

**Info**

Type: Purchase

Transaction \*: PO-202010001

Date \*: 7/10/2020

Ref.:

VAT Cal.: No VAT

**Contact**

Contact name: Type name,code

Contact code:

Contact phone:

Contact email:

Contact address:

☒ Tax ID, Branch

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

**Product**

Choose product

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

+ Add product

Shipping channel: Flash Express

Remark:

Discount: Amount or %

Shipping fee: 50.00

☐ VAT

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.

**ZORT**

- Report
- Orders
- Purchases**
  - Add purchase
  - Purchases
  - Returns
  - Receive
- Inventories
- Contacts
- Finance
- Documents
- Settings
- Packages
- ZORT Market

Purchases Total: 7,500.00

**Net Amount: 7,550.00**

**Shipping**

Shipping date: 07/10/2020 12:00

**Payment**

Payment: None

Add payment

Used to record payments. To show the payment status.

**Warehouses/Branches**

Transfer: ☐ Pending ☒ Complete

คลังสินค้าเล็ก

Back Save + Add another Save

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

**Purchase detail**

Attach file

More Print See activity

**Info**

Transaction: PO-202010002

Type: Purchase

Date: 7 October 2020

Created by: ทศกร อนันตเมฆ

**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.

The screenshot shows the 'Quick add' modal in the ZORT system. The modal is titled 'Quick add' and has a close button (X) in the top right corner. It contains the following fields and elements:

- Choose product:** A section with a table for product details.
- | Code   | Product name * | Quantity *   | Unit price * | Total      |
|--------|----------------|--------------|--------------|------------|
| Choose | P286           | Wooden Chair | 5.00         | 1,500.00   |
|        |                |              |              | 7,500.00 x |
- + Add product:** A button to add more products.
- Payment channel \*:** A dropdown menu with 'kbank' selected.
- Warehouse/branch \*:** A dropdown menu with 'คลังสินค้าหลัก' selected.
- Net Amount:** A field showing '7,500.00'.
- Save:** A blue button at the bottom right.

The background shows the ZORT interface with a sidebar menu and a 'Purchases' section.

## 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.

The screenshot shows the 'Import Excel File' modal in the ZORT system. The modal is titled 'Import Excel File' and has a close button (X) in the top right corner. It contains the following fields and elements:

- Choose Excel file:** A section with a 'Choose File' button and the text 'No file chosen'.
- Download template file here:** A blue button with a download icon.
- Save:** A blue button at the bottom right.

The background shows the ZORT interface with a sidebar menu and a 'Purchases' section. Below the modal, a table of purchases is visible:

#	Date	Purchase Order	Product	Quantity	Status	Payment
1	Today	PO-202010003		7,500	Completed	Paid
2	Today	PO-202010002	Mr. Bush (Headquarters)	7,550	Completed	Unpaid



## 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.

**Purchases**  
3 items, Total amount 94,000 Baht

Search... Advanced search

Buttons: Import Excel File, Add, Quick add

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

3 items | Rows per page 20

Export to Excel

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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 application interface. On the left sidebar, the 'Orders' menu item is highlighted with a red box and a red circle containing the number 1. The main content area displays the 'Orders' page with a header showing '24 items, Total amount 1,062,550 Baht'. Below the header is a search bar and a table of orders. The table has columns for #, Date, Order, Customer, Sales channel, Shipping date, Amount, Status, and Payment. The first six rows of the table are visible, showing various orders with their respective details.

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 shows the same ZORT Orders page as the previous one, but with the 'Add', 'Quick add', and 'Import Excel file' buttons highlighted by a red box. Red circles with numbers 1, 2, and 3 are placed over the 'Add', 'Quick add', and 'Import Excel file' buttons respectively, indicating the three ways to create 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.

The screenshot shows the 'Add Order' form in the ZORT system. The left sidebar contains a menu with options like Report, Orders, Add order, Orders, Postal Service, Returns, Pack, Purchases, Inventories, Contacts, Finance, Documents, and Accounting. The main form is titled 'Add Order' and is divided into two main sections: 'Info' and 'Customer'.

**Info Section:**

- Type: Sell
- Order \*: SO-202010002
- Date \*: 7/10/2020
- Ref.:
- Sales channel: Facebook
- VAT Cal.: Include VAT 7%
- Agent: None Choose agent

**Customer Section:**

- 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.

The screenshot shows the 'Add Order' form in the ZORT system, specifically the 'Product' section. The left sidebar is the same as in the previous screenshot. The main form is titled 'Product' and contains a table for adding products, a shipping channel selection, and a summary of costs.

**Product Table:**

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

**Shipping and Summary:**

- Shipping channel: Kerry
- Discount: Amount or %
- Shipping fee (Customer paid): 50.00
- VAT: ☐ 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 'Add order' form in the ZORT application. The left sidebar contains a menu with options: 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, Shipping, Payment, and Warehouses/Branches. The Recipient info section includes fields for Recipient name (Ben Lee), Recipient phone (0812221111), Recipient email (benjamin.l@demo.com), and Shipping address (321 Water Gate Pavillion, Bangna, Bangna, BKK 10260). The Shipping section includes Shipping date (08/10/2020 13:00) and Tracking No. (KR063623232TH). The Payment section includes a Payment field set to None and an Add payment button. The Warehouses/Branches section includes a Transfer field set to Pending and a Complete radio button. At the bottom, there are buttons for Back, Save + Add another, and Save.

**Recipient info**

Recipient name: Ben Lee

Recipient phone: 0812221111

Recipient email: benjamin.l@demo.com

Shipping address: 321 Water Gate Pavillion, Bangna, Bangna, BKK 10260

**Shipping**

Shipping date: 08/10/2020 13:00

Tracking No.: KR063623232TH

**Payment**

Payment: None

**Warehouses/Branches**

Transfer: Pending

Buttons: Back, Save + Add another, Save

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

The screenshot shows the 'Order detail' page in the ZORT application. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Order detail' and includes a 'Share Link' button. Below the title, there are three status cards: Payment status (Unpaid), Inventory status (Pending), and Shipping status (Kerry). The bottom section is divided into two columns: Info and Customer. The Info column contains fields for Order (SO-202010002), Type (Sell), Date (7 October 2020), and Sales channel (Facebook). The Customer column contains fields for 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, Bangna, BKK 10260), Tax ID (11220006565632), and Branch name (Headquarters).

**Order detail**

Payment status: Unpaid

Inventory status: Pending

Shipping status: Kerry

**Info**

Order: SO-202010002

Type: Sell

Date: 7 October 2020

Sales channel: Facebook

**Customer**

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, Bangna, 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.

The screenshot shows the 'Quick add' modal in the ZORT system. The modal is titled 'Quick add' and has a close button (X) in the top right corner. It contains the following fields and options:

- Choose product:** A section with a table for product selection.
- Table:** A table with columns: Code, Product name, Quantity, Unit price, and Total. The first row shows 'P267', 'Shirt', '1.00', '250.00', and '250.00'.
- + Add product:** A button to add more products.
- Payment channel:** A dropdown menu with 'Cash' selected.
- Warehouse/branch:** A dropdown menu.
- Net Amount:** A field showing '250.00'.
- Save:** A blue button to save the order.

The background shows the ZORT interface with a sidebar menu and a list of orders.

## 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.

The screenshot shows the 'Import orders' modal in the ZORT system. The modal is titled 'Import orders' and has a close button (X) in the top right corner. It contains the following fields and options:

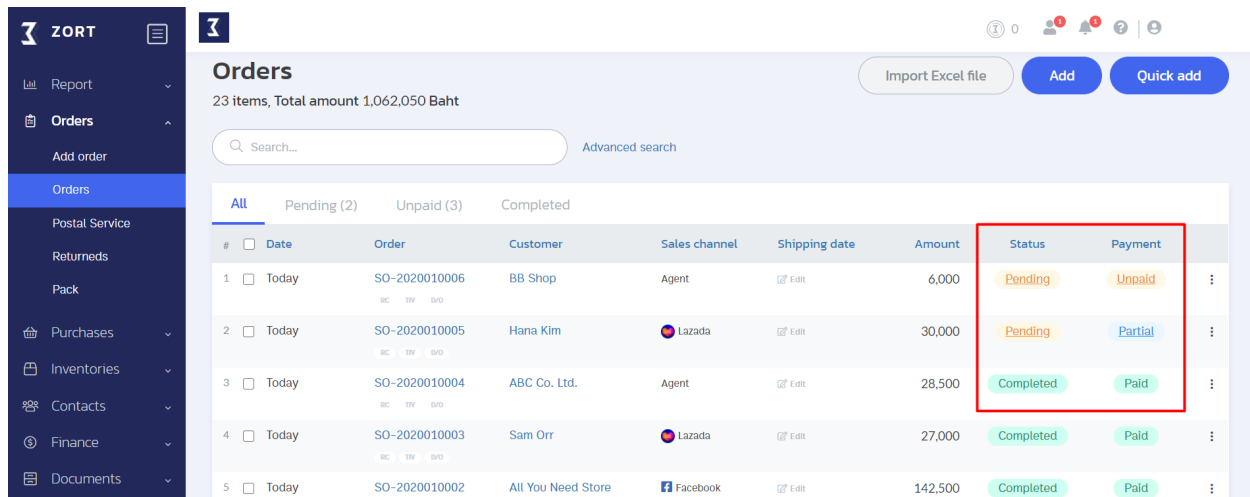
- Choose Excel file:** A section with a 'Choose File' button and the text 'No file chosen'.
- Download template file here:** A blue button to download the template file.
- Save:** A blue button to save the import.

The background shows the ZORT interface with a sidebar menu and a list of orders.

## 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.



The screenshot shows the ZORT Orders dashboard. The left sidebar contains navigation links: Report, Orders (selected), Add order, Orders (sub-menu), Postal Service, Returns, Pack, Purchases, Inventories, Contacts, Finance, and Documents. The main area displays the 'Orders' section with 23 items and a total amount of 1,062,050 Baht. A search bar and 'Advanced search' link are present. Below the search bar, there are tabs for 'All', 'Pending (2)', 'Unpaid (3)', and 'Completed'. The table lists 5 orders with columns: #, Date, Order, Customer, Sales channel, Shipping date, Amount, Status, and Payment. A red box highlights the 'Status' and 'Payment' columns.

#	Date	Order	Customer	Sales channel	Shipping date	Amount	Status	Payment
1	Today	SO-2020010006	BB Shop	Agent	Edit	6,000	Pending	Unpaid
2	Today	SO-2020010005	Hana Kim	Lazada	Edit	30,000	Pending	Partial
3	Today	SO-2020010004	ABC Co. Ltd.	Agent	Edit	28,500	Completed	Paid
4	Today	SO-2020010003	Sam Orr	Lazada	Edit	27,000	Completed	Paid
5	Today	SO-2020010002	All You Need Store	Facebook	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 item(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 interface with the 'Orders' menu highlighted. The main content area displays a list of orders with columns for #, Date, Order, Customer, Sales channel, Shipping date, Amount, Status, and Payment. The first two orders are selected with checkboxes.

#	Date	Order	Customer	Sales channel	Shipping date	Amount	Status	Payment
1	Today	SO-202010002	Jenny Kim	Facebook	Edit	600	Pending	Paid
2	Today	SO-202010001	Alisa Chi	Facebook	Edit	500	Pending	Paid
3	Today	SO-2020010006	Sam Lee	Agent	Edit	6,000	Pending	Unpaid
4	Today	SO-2020010005	Josh Titan	Lazada	Edit	30,000	Pending	Partial
5	Today	SO-2020010004	ABC Ltd.	Agent	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 interface with the 'Postal Service' dropdown menu open. The dropdown menu contains options for '1 shipment' and 'Each shipment', and a list of export options.

#	Date	Order	Customer	Sales channel	Shipping date	Amount	Status	Payment
1	Today	SO-202010002	Jenny Kim	Facebook	Edit	600	Pending	Paid
2	Today	SO-202010001	Alisa Chi	Facebook	Edit	500	Pending	Paid
3	Today	SO-2020010006	Sam Lee	Agent	Edit	6,000	Pending	Unpaid

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

**Postal Service (1 shipment)**

Postal service

- J&T EXPRESS**  
Send throughout Thailand. (1-2 Day)  
[Register](#)
- FLASH EXPRESS**  
Pickup and send throughout Thailand.  
[See detail](#)
- Thailand Post - Dropoff EMS**  
Thailand Post - Dropoff EMS  
[Check out available branches.](#)
- Thailand Post - Dropoff Register**  
[Check out available branches.](#)
- ninja van**  
Home delivery (in Bangkok) and send throughout Thailand.
- sendit**  
Cash on delivery by Sendit  
[See detail](#)
- KERRY EXPRESS**  
Send throughout Thailand.  
[See detail](#)

From

From: [Dropdown menu]

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

**Sender info**

Demo Shop

0987654322

128/152 Elite Condo,  
Bangkok Thailand

10400

Promotion code

**Recipient info** [Delete](#)

Order SO-202010002

----Choose weight----

Jenny Kim

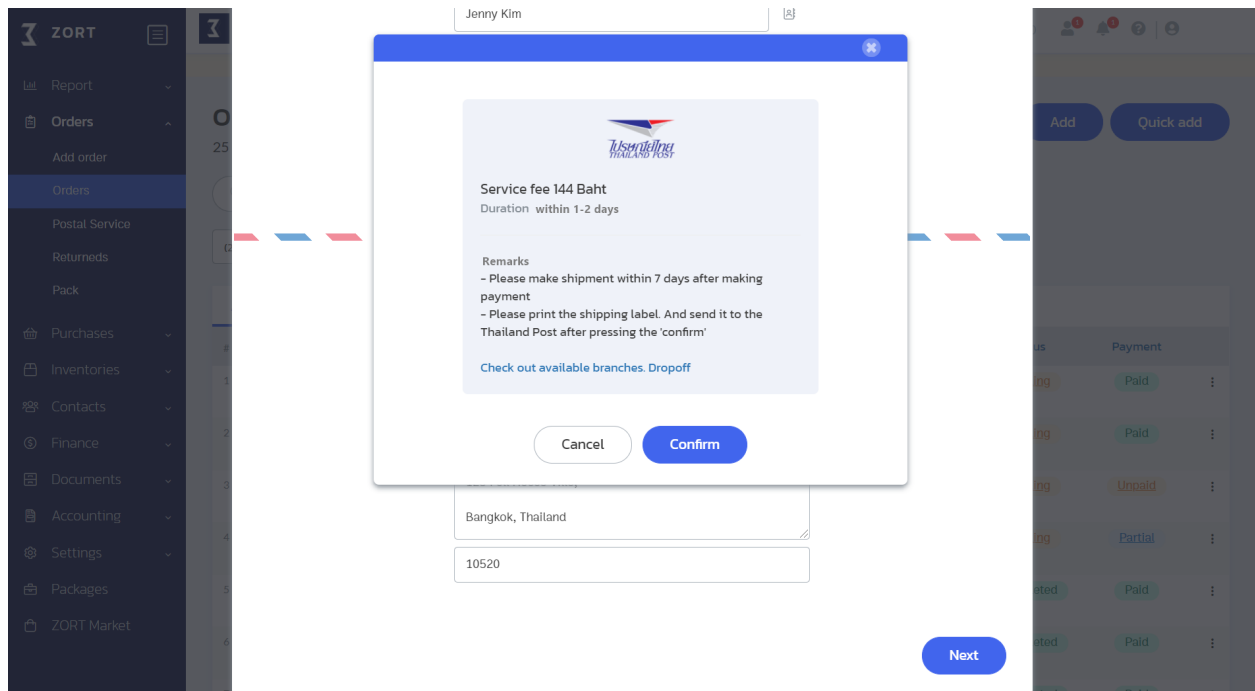
0976765432

32 The Empire Hotel,  
Bangkok, Thailand

10435



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 interface. On the left sidebar, the 'Orders' menu is highlighted with a red box and a red circle with the number '1'. The main content area shows the 'Orders' page with a table of 25 items. The first order is selected, indicated by a red box and a red circle with the number '2' around the checkbox and 'Today' date. The table has columns: #, Date, Order, Customer, Sales channel, Shipping date, Amount, Status, and Payment.

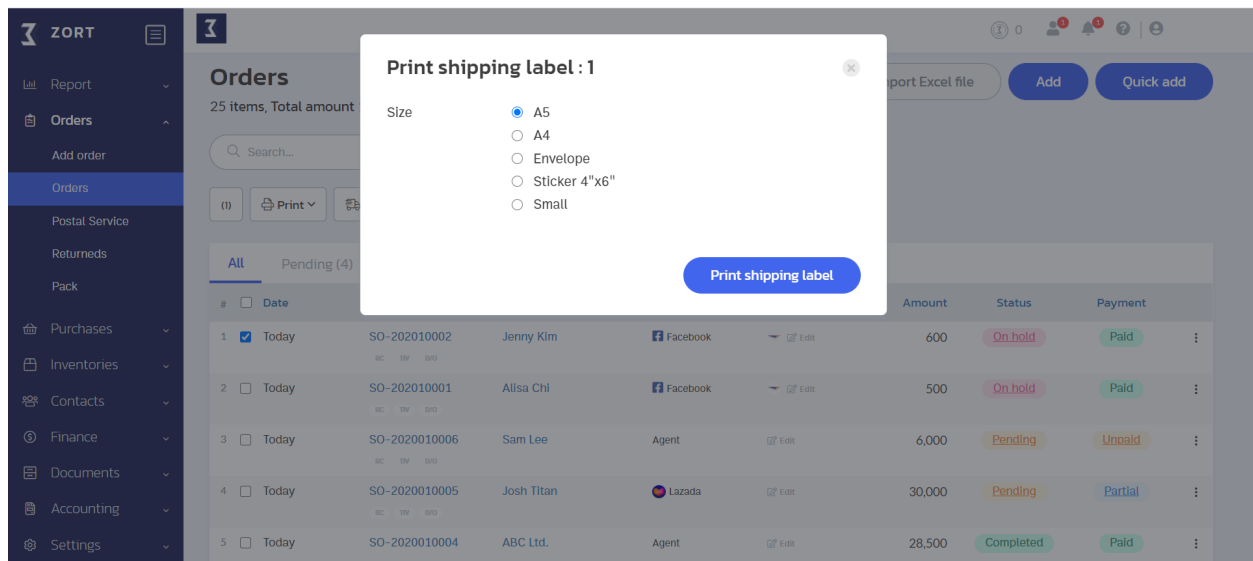
#	Date	Order	Customer	Sales channel	Shipping date	Amount	Status	Payment
1	<input checked="" type="checkbox"/> Today	SO-202010002	Jenny Kim	Facebook	Edit	600	On hold	Paid
2	<input type="checkbox"/> Today	SO-202010001	Alisa Chi	Facebook	Edit	500	On hold	Paid
3	<input type="checkbox"/> Today	SO-2020010006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

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

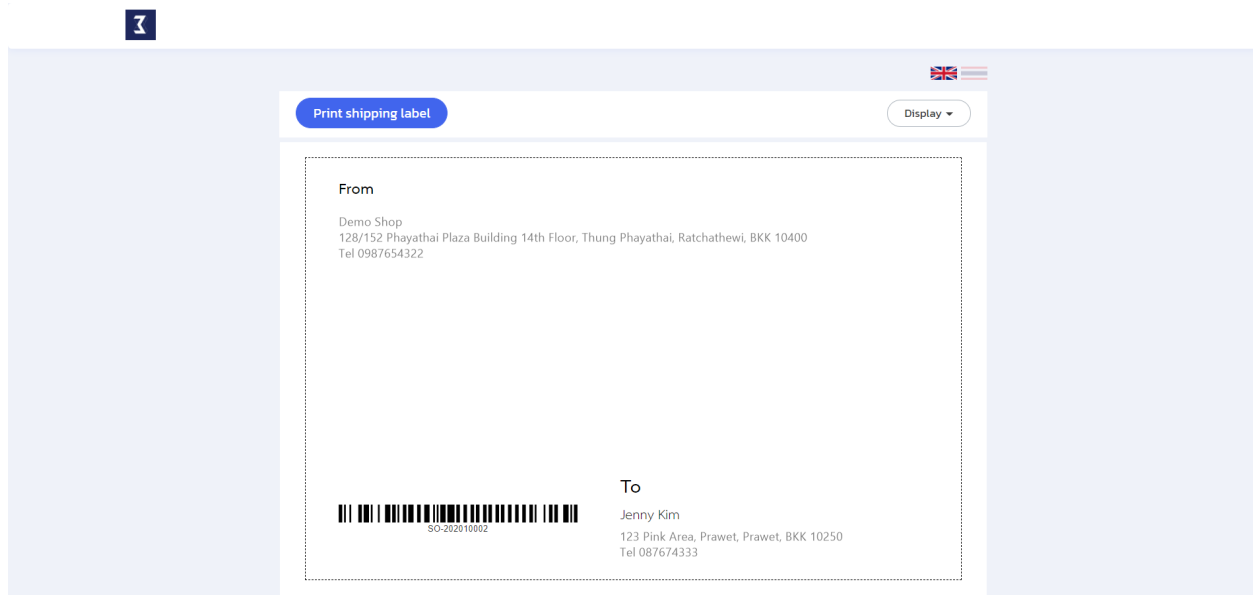
The screenshot shows the ZORT interface with the 'Print' dropdown menu open. The 'Print shipping label' option is highlighted with a red box. The table of orders is visible in the background.

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

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



#### 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.

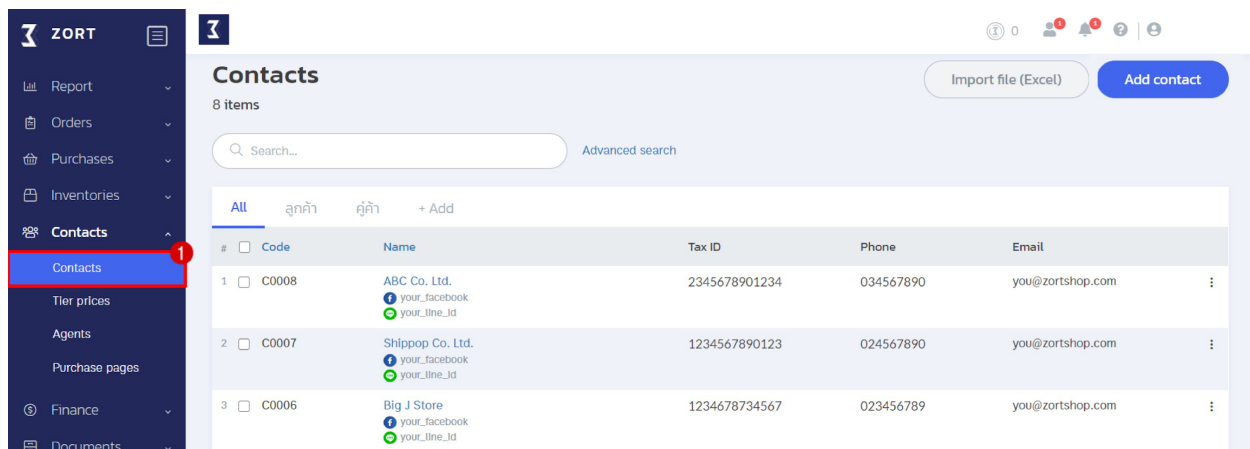


# Contacts

## Adding Contacts

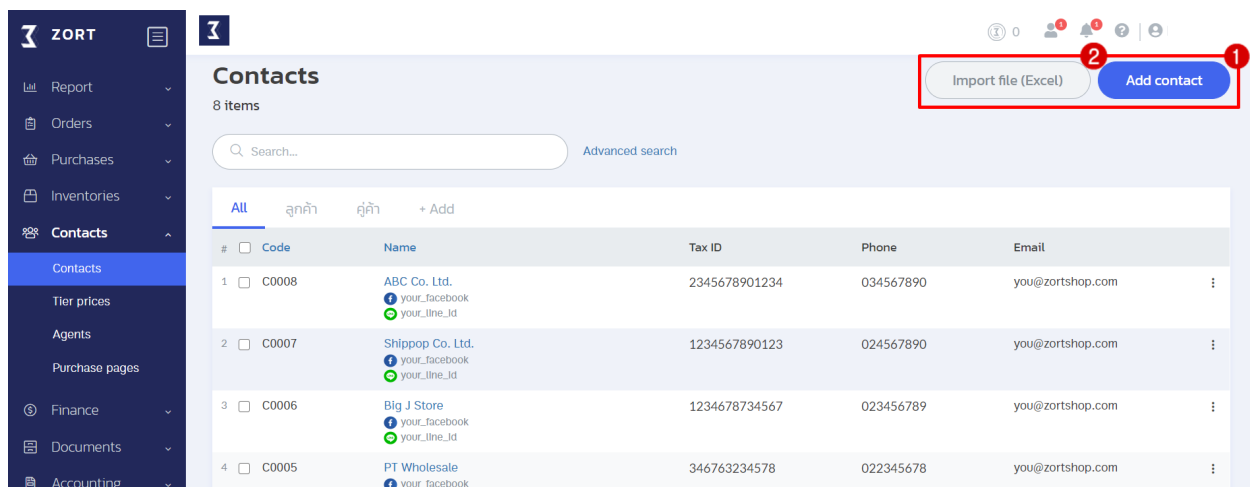
Whenever a transaction is made on ZORT, the information of the customer/contact will be automatically saved in the system. Alternatively, if your store already has a contact list, you can import it into the system by following the steps below.

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



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)).



## 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."

The screenshot shows the ZORT interface. On the left is a sidebar menu with options like Report, Orders, Purchases, Inventories, Contacts, Tier prices, Agents, Purchase pages, Finance, Documents, Accounting, Settings, Packages, and ZORT Market. The 'Contacts' section is selected. In the center, the 'Add contact' form is open. It has two tabs: 'Info' and 'Contact'. The 'Info' tab is active, showing fields for Tierprice (No tierprice), Code (C0009), Name (Sarah Lee), and a checkbox for 'Tax ID, Branch'. The 'Contact' tab shows fields for Phone (020011122), Mobile (0986554456), Fax (025451133), Email (sarah.l@goodmail.com), and Address (456 Smiley Village, BKK 10540). On the right, a list of existing contacts is visible, showing columns for phone numbers and email addresses.

## 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.

The screenshot shows the ZORT interface with the 'Import contact' dialog box open. The dialog has a 'Choose file' button and a 'Download template file here' link. Below the dialog, the 'Contacts' list is visible, showing a table with columns for #, Code, Name, Phone, Mobile, Fax, Email, and a checkbox. The table contains 9 items. The 'Import file (Excel)' button is also visible in the top right corner of the interface.

# 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.).

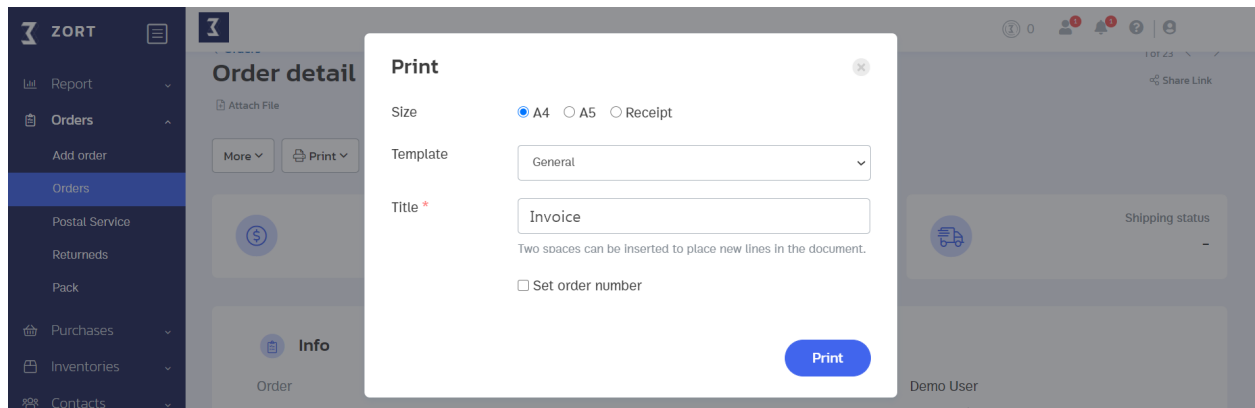
The screenshot shows the ZORT Orders page. The left sidebar contains navigation options: Report, Orders, Add order, Orders, Postal Service, Returns, Pack, Purchases, Inventories, Contacts, Finance, Documents, and Accounting. The main content area is titled 'Orders' and shows '23 items, Total amount 1,062,050 Baht'. There are buttons for 'Import Excel file', 'Add', and 'Quick add'. A search bar is present. Below the search bar, there are tabs for 'All', 'Pending (2)', 'Unpaid (3)', and 'Completed'. A table lists the orders with columns: #, Date, Order, Customer, Sales channel, Shipping date, Amount, Status, and Payment. The order SO-2020010006 is highlighted with a red box.

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

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

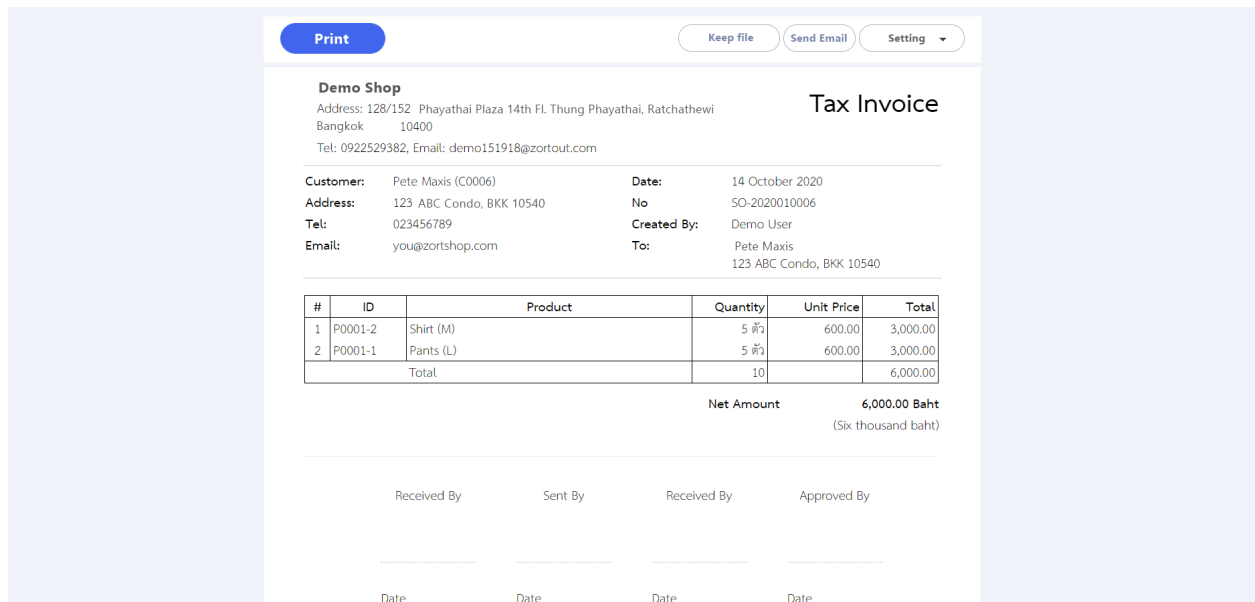
The screenshot shows the ZORT Order detail page for order SO-2020010006. The left sidebar is the same as the previous screenshot. The main content area is titled 'Order detail' and shows '1 of 23' items. There are buttons for 'More', 'Print', 'Postal Service', 'Send SMS', and 'See activity'. The 'Print' button is highlighted with a red box. Below the buttons, there are sections for 'Payment status' (Unpaid), 'Inventory status' (รอโอนสินค้า), and 'Shipping status' (-). The 'Info' section shows details about the order: Order (SO-2020010006), Type (Sell), Date (14 October 2020), Sales channel (Agent), and Agent (ตัวแทนจำหน่าย 1). The 'Customer' section shows details about the customer: Created by (Demo User), Customer name (Pete Maxis), Customer code (C0006), Customer phone (023456789), Customer email (you@zortshop.com), and Customer address (123 ABC Condo, BKK 10450).

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

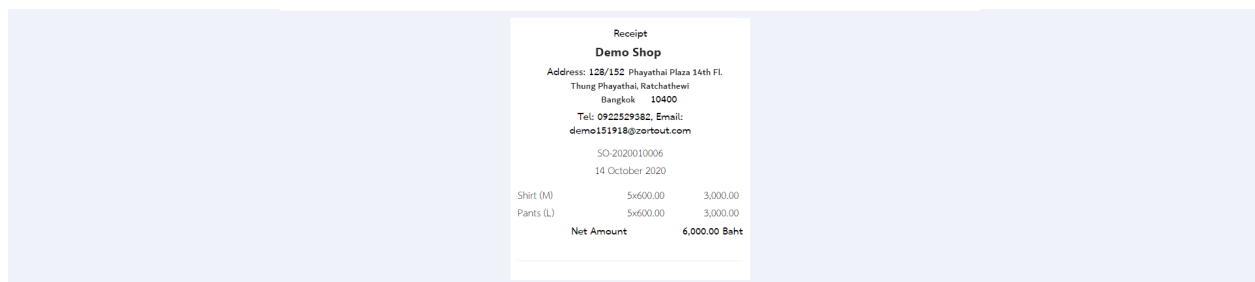


### 4. Click on "Print."

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

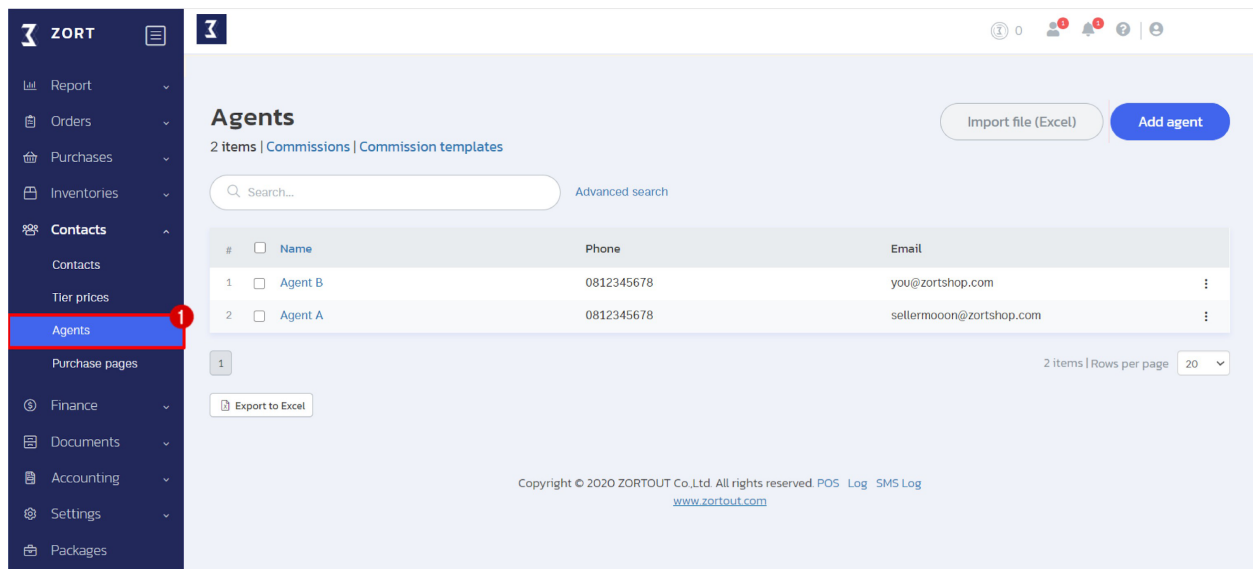


# Sales Agents

## Adding Sales Agents

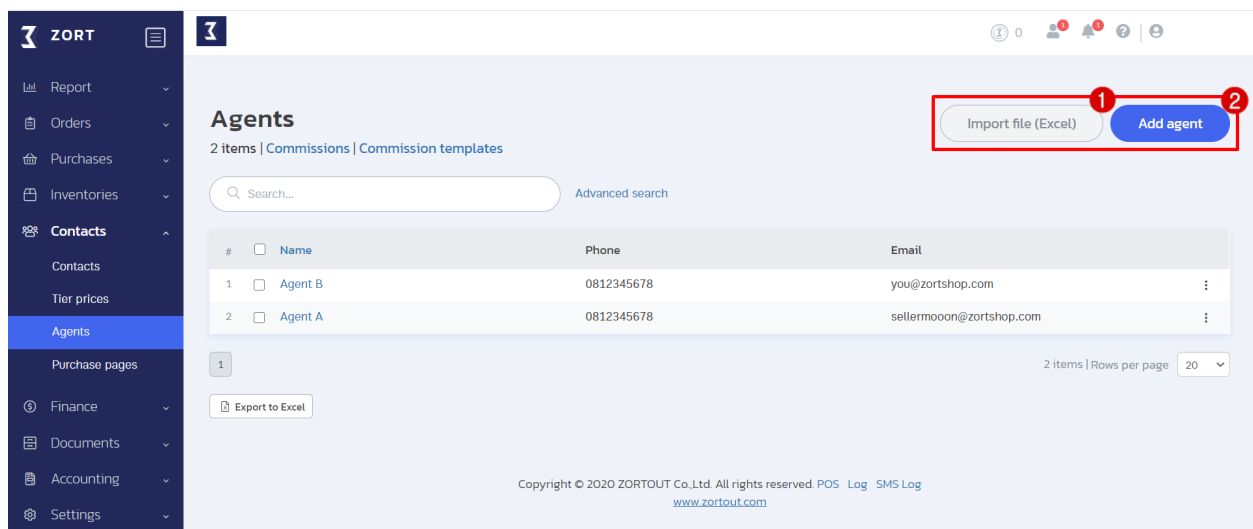
To get started with the dropshipping features, firstly, you have to add sales agents into the database. Follow the steps below.

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



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)).





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

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

The screenshot shows the ZORT system interface with the 'Add agent' modal form open. The form contains the following fields:

- Agent name \*: Agent C
- Phone: 0875746251
- Email: agentz@zortshop.com
- Address: 56/3 Hemmingway Street, Bangkok 10520

A 'Save' button is located at the bottom right of the modal. In the background, the 'Agents' table is visible with two items: Agent B and Agent A. The footer of the page reads: Copyright © 2020 ZORTOUT Co.Ltd. All rights reserved. POS Log SMS Log www.zortout.com

## 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.

The screenshot shows the ZORT system interface with the 'Import agent' modal form open. The form contains the following elements:

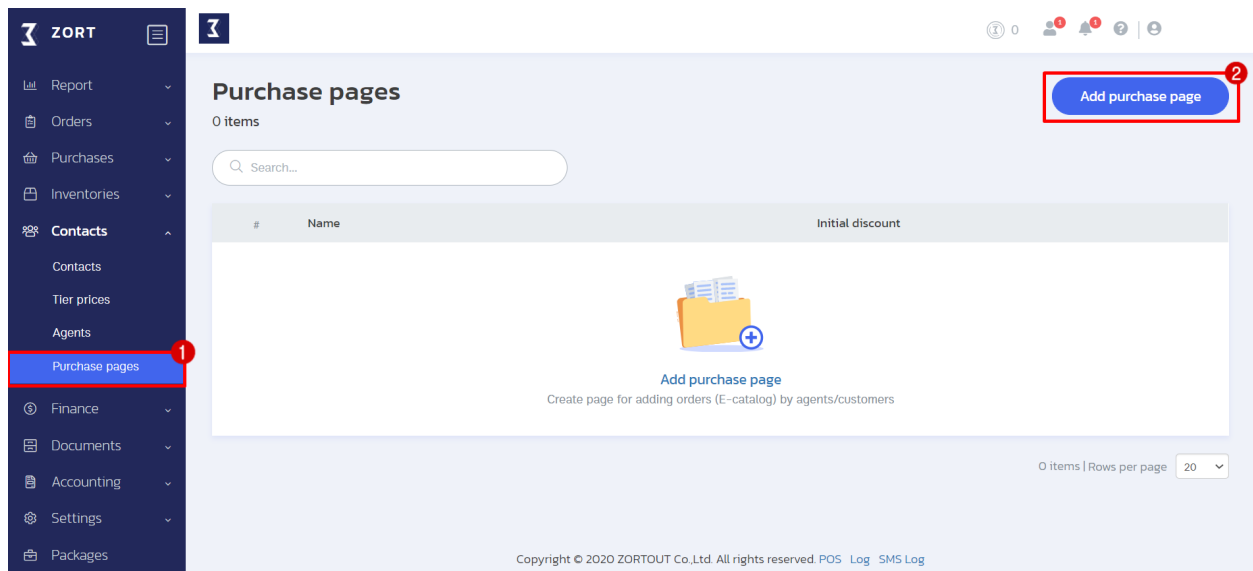
- Choose file Excel: Choose File No file chosen
- Download template file here (button)
- Save (button)

In the background, the 'Agents' table is visible with two items: Agent B and Agent A. The footer of the page reads: Copyright © 2020 ZORTOUT Co.Ltd. All rights reserved. POS Log SMS Log www.zortout.com

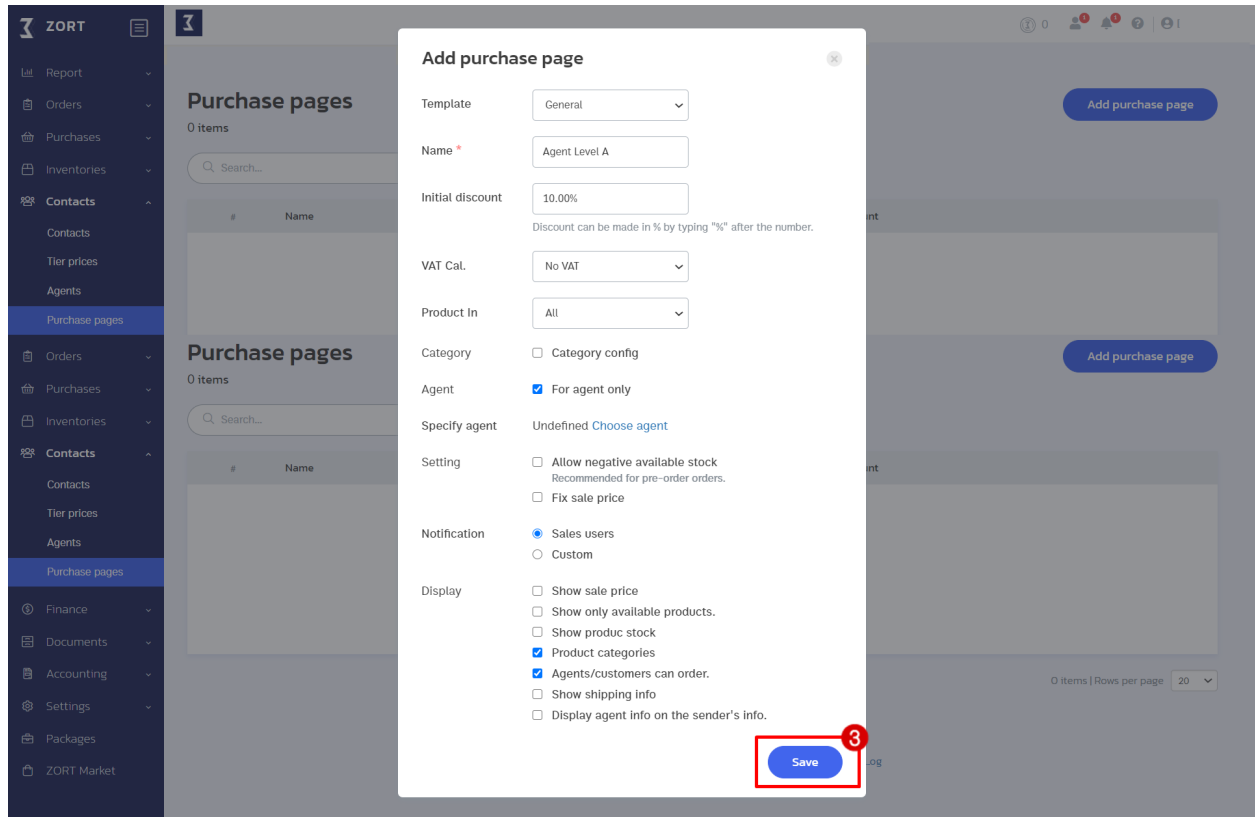
## Creating Purchase Pages

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.

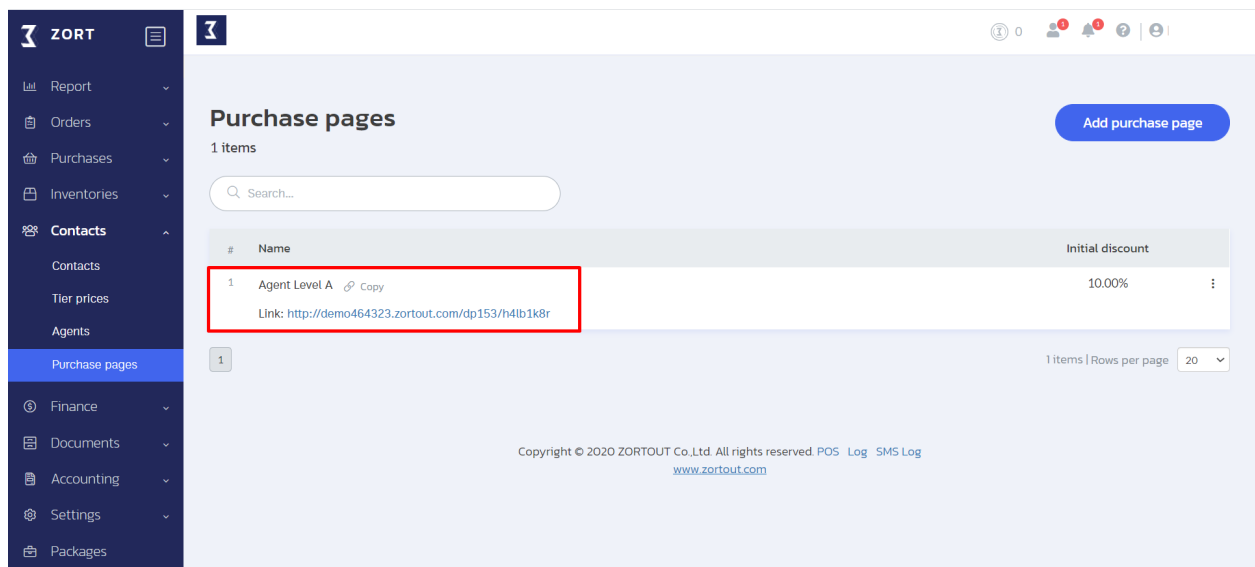
1. Go to the "Contacts" menu and select "Purchase Page."
2. Click on "Add purchase page."



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



Shirt (M)  
P0001-2  
[Add to cart](#)



Shirt (S)  
P0001-1  
[Add to cart](#)



No data

[Checkout](#)

Product 8 Items

# Settings

## General Settings

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

The screenshot shows the ZORT application interface. On the left, a dark sidebar contains a menu with 'Settings' expanded, and 'Organisation' highlighted with a red box and a red circle containing the number '1'. The main area is titled 'Organisation Info' and contains the following fields:

- Organisation:** Demo Shop
- Tax ID:** 11234567898765
- Branch name - Main:** (empty)
- Branch no - Main:** BR001
- Address:** 128/152 Selter Hub Bangkok 10400
- Organisation (English):** (empty)
- Branch name - Main (English):** (empty)
- Address (English):** (empty)

There is also a section for 'Contact Info' at the bottom, which is currently empty. An 'Organisation logo' placeholder is visible on the right side of the form.

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 ZORT application interface. On the left is a dark sidebar menu with the ZORT logo at the top. The menu items include Report, Orders, Purchases, Inventories, Contacts, Finance, Documents, Accounting, Settings (highlighted with a red box and a red circle with the number 1), Profile, Organisation, Users, User rights (highlighted with a red box and a red circle with the number 1), and Notification. The main content area is titled "User rights" and shows "3 items". It contains a table with the following data:

Name	
Admin	Edit
Sales Team	Edit
Purchasing Team	Edit

At the bottom right of the table, it says "3 items | Rows per page 20". In the top right corner of the main area, there is a blue button labeled "Add user rights" (highlighted with a red box and a red circle with the number 2). At the bottom of the page, there is a footer with the text: "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.”

**Add user rights**

Name\*

Report ☒ None ☐ All

Orders ☒ None ☐ All ☐ View only

Purchase Order ☒ None ☐ All ☐ View only

Product and Category ☒ None ☐ All ☐ View only

Warehouses/Branches ☒ None ☐ All ☐ Partial

Contact page ☒ None ☐ All ☐ View only

Finance ☒ None ☐ All ☐ Income only ☐ Expense only ☐ Income and Expense only

Point of Sales Setting ☒ None ☐ All

Settings ☒ None ☐ All ☐ Partial

**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.”

**Users**

3 items

Search... Advanced Search

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

1 3 items | Rows per page 20

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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."

The screenshot shows the ZORT application interface. On the left is a dark sidebar menu with options: Report, Orders, Purchases, Inventories, Contacts, Finance, Documents, Accounting, Settings (highlighted), Profile, Organisation, Users (highlighted), User rights, Notification, Integration, Packages, and ZORT Market. The main content area is titled 'Users' and shows '3 items' with a search bar. A modal window titled 'Add user' is open in the center. It contains the following fields: Email (with value 'lola.b@demoshop.com'), Password (masked with dots), Confirm Password (masked with dots), Name (with value 'Lola'), and User rights (a dropdown menu with 'Admin' selected). There is a link '+Add user rights' below the dropdown. A blue 'Save' button is at the bottom right of the modal. In the background, a table with columns 'User rights' and 'Status' is visible, showing three rows with 'Active' status. At the bottom of the screen, a copyright notice reads: 'Copyright © 2020 ZORTOUT Co.,Ltd. All rights reserved. POS Log SMS Log www.zortout.com'.

## Other Settings

### 1. Profit Calculation

There are 2 methods for calculating your profit on ZORT:

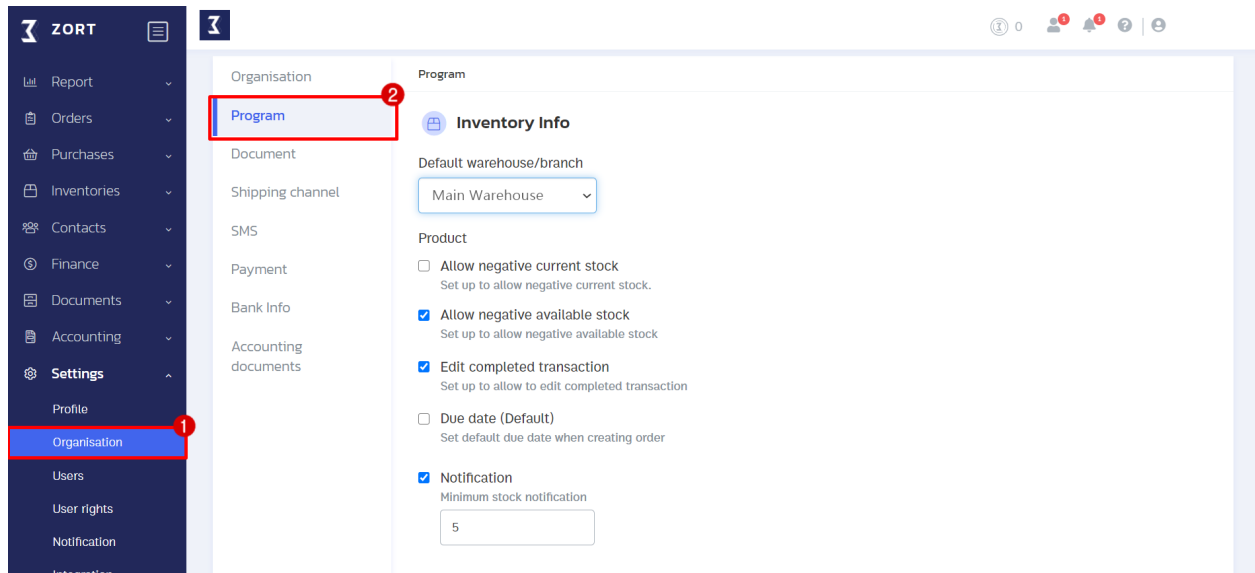
1) Moving Average is a calculation based on the average cost price of each batch.

2) FIFO (First In First Out) is a calculation method based on the actual cost of the items that are purchased and sold first.

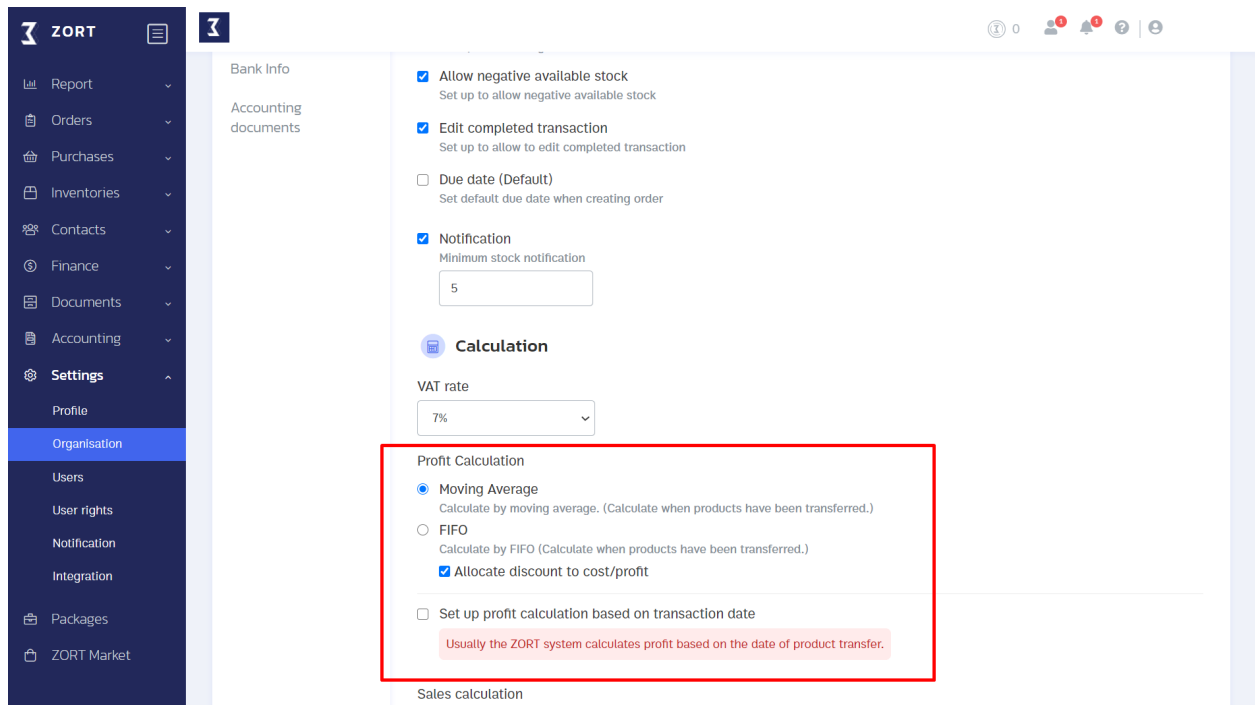


1. Go to the "Settings" menu and select "Organisation."

2. Click on "Program."



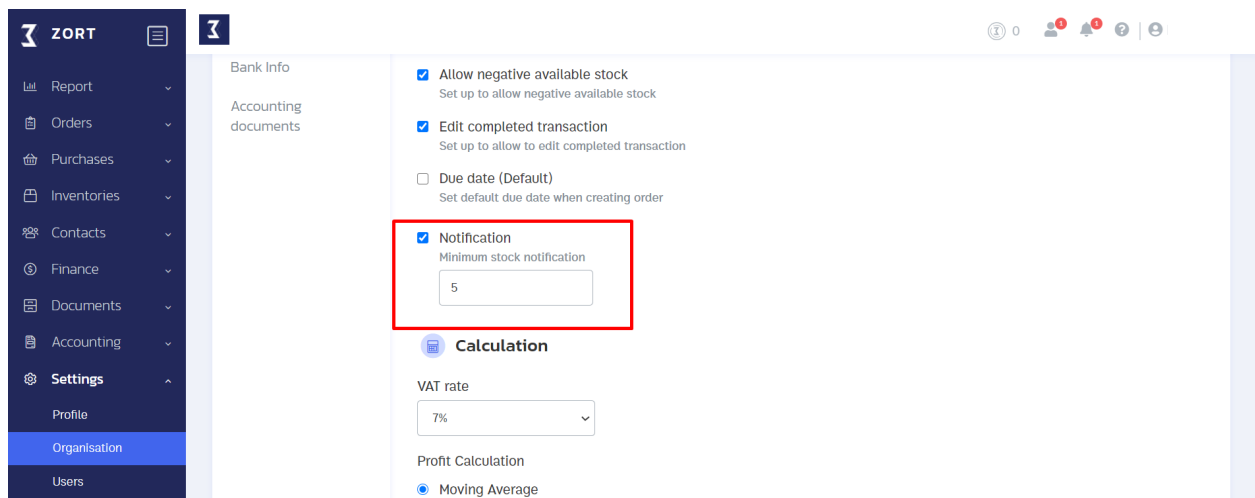
3. Click on the preferred profit calculation method.



## 2. Low Stock Alert Setting

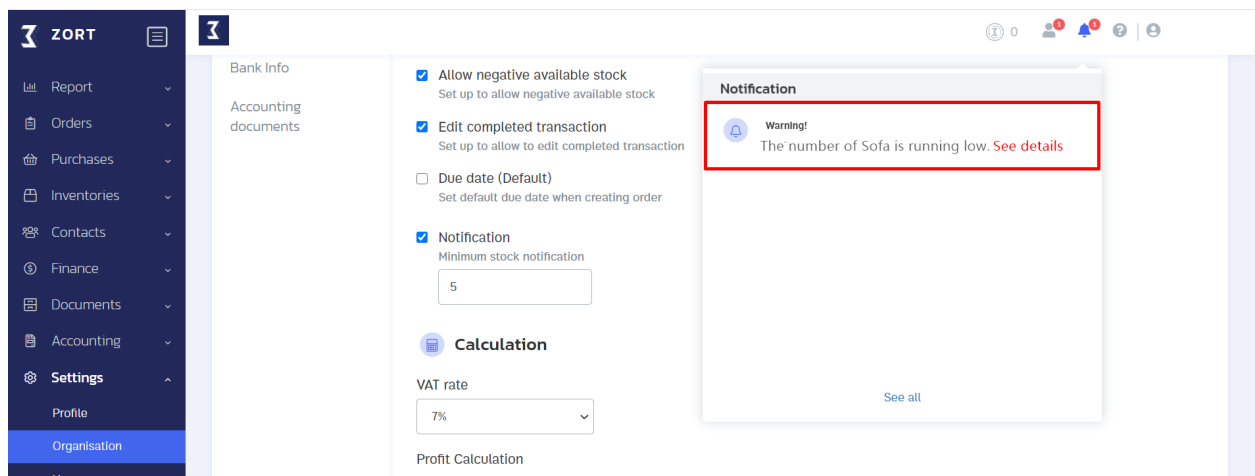
If your store has a long restocking lead time, you might lose so many opportunities to sell your items before the new batch arrives. Therefore, it's recommended that you set up a minimum quantity for low stock alerts by following the steps below.

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.



The screenshot shows the ZORT application interface. On the left is a dark sidebar with a menu including Report, Orders, Purchases, Inventories, Contacts, Finance, Documents, Accounting, Settings, Profile, Organisation (highlighted), and Users. The main content area is titled 'Bank Info' and 'Accounting documents'. It contains several settings: 'Allow negative available stock' (checked), 'Edit completed transaction' (checked), 'Due date (Default)' (unchecked), 'Notification' (checked), and 'Calculation' (set to Moving Average). The 'Notification' section is highlighted with a red box, showing a 'Minimum stock notification' input field with the value '5'.

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



This screenshot shows the same ZORT 'Organisation' settings page as before, but with a notification overlay on the right. The notification is titled 'Warning!' and contains the text 'The number of Sofa is running low. See details'. A red box highlights the notification message. The 'Notification' setting in the background remains checked and set to 5.

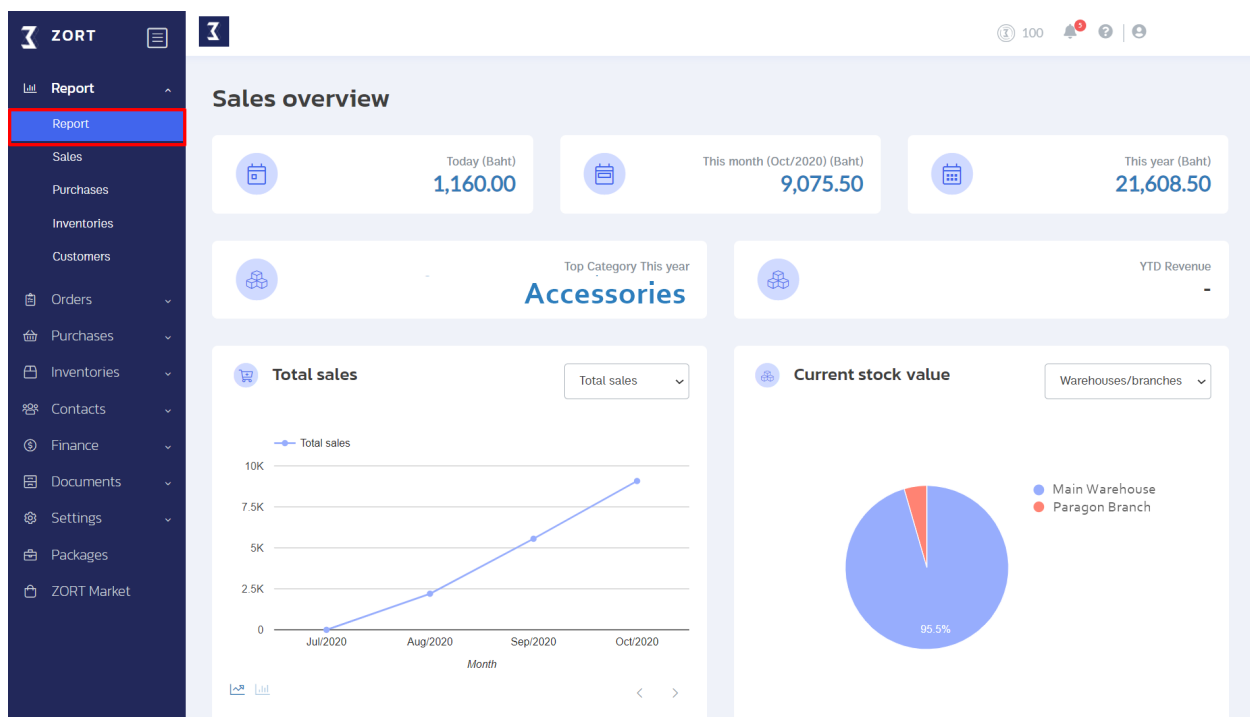
# Reports

## 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."



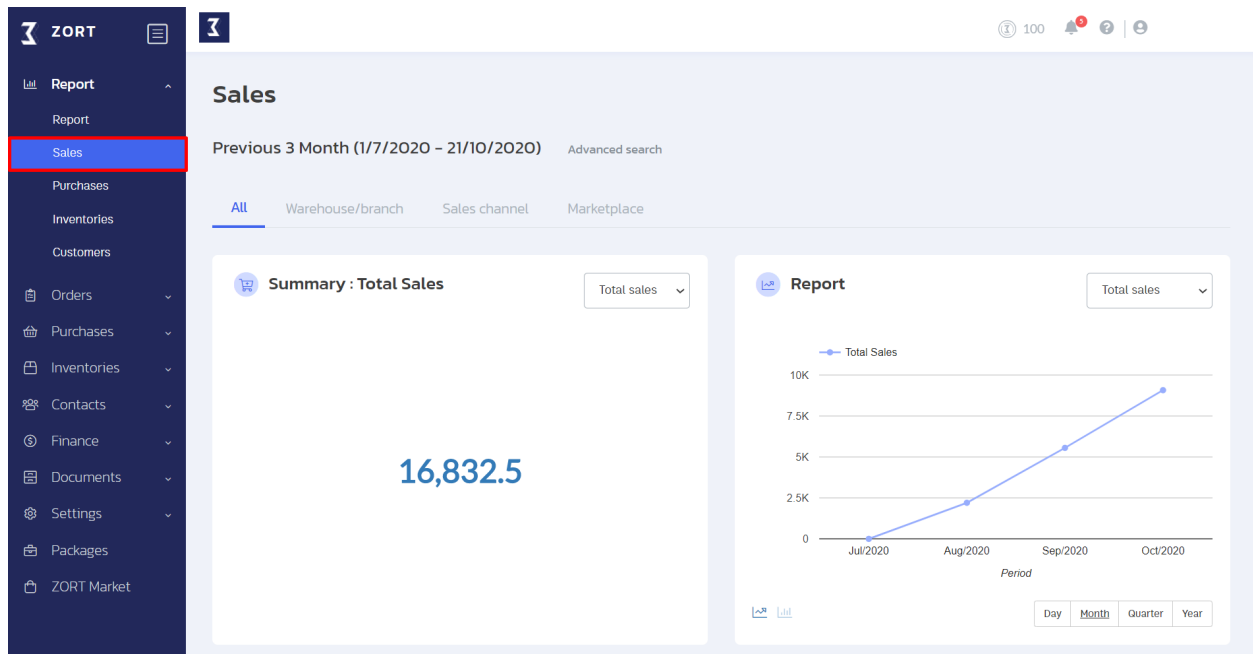
You see reports on your business based on these following topics:

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.

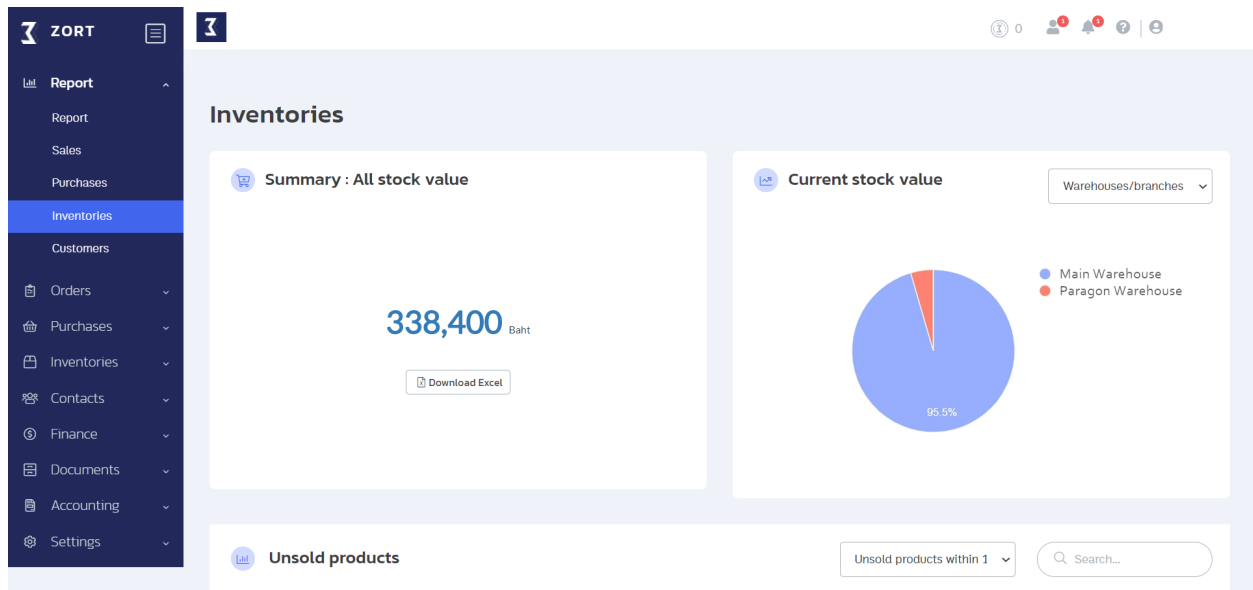
1. Go to the "Report" menu and click on " Sales."



## 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.

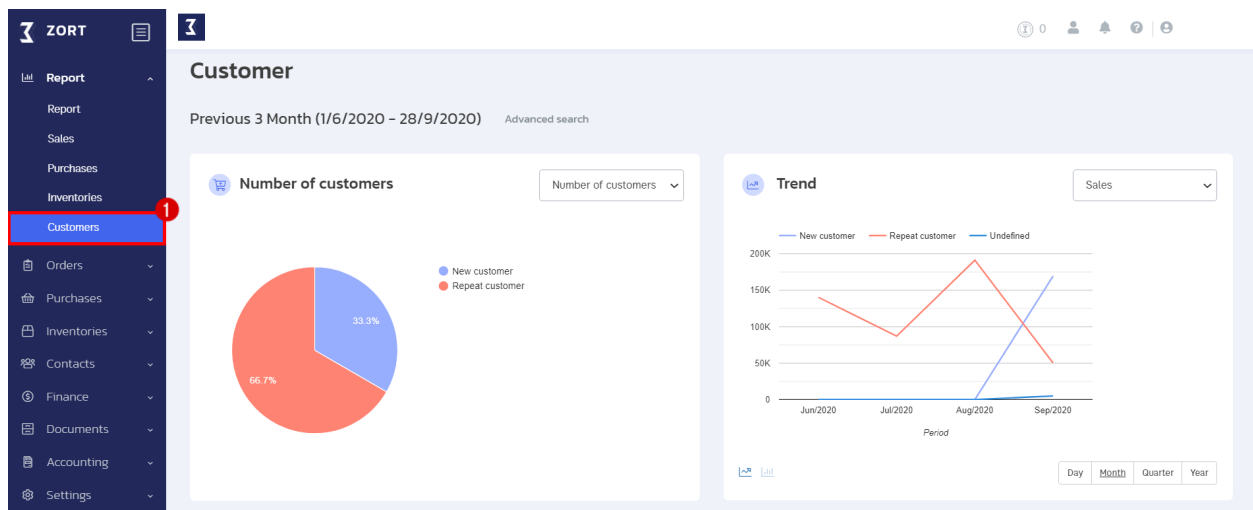
1. Go to the "Report" menu and select "Inventories."



## 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.

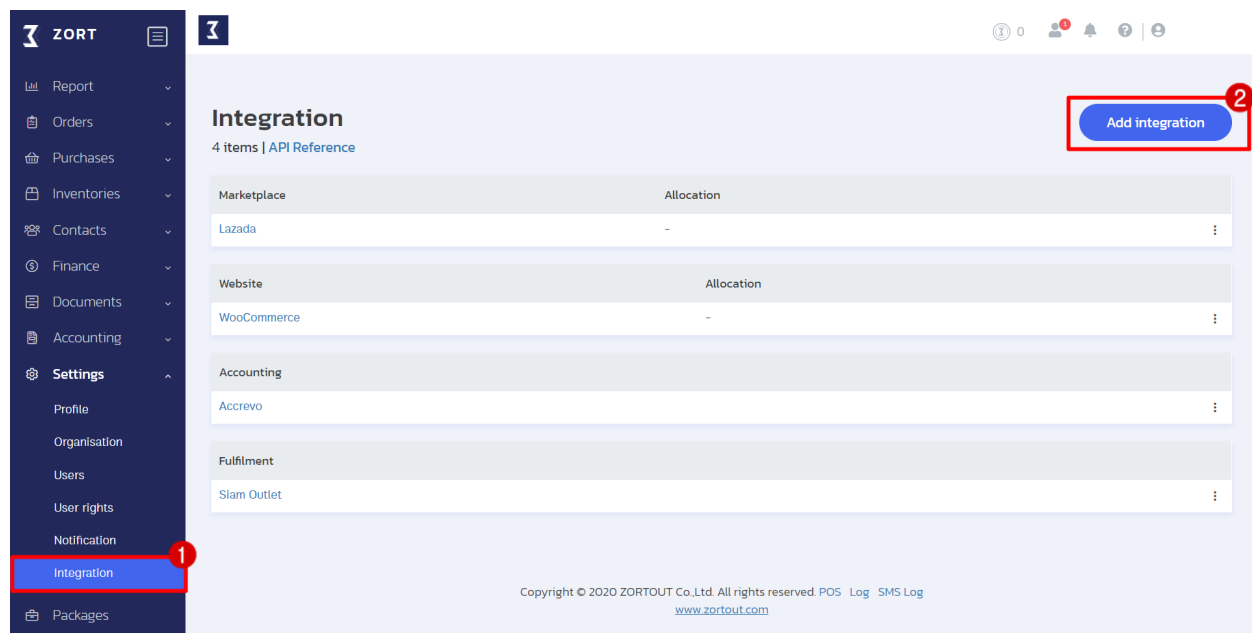
1. Go to the "Report" menu and select "Customers."



# Integrations

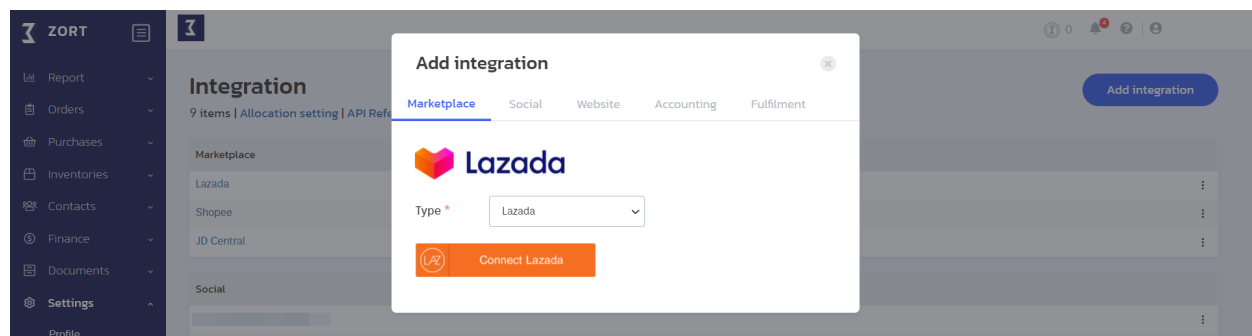
ZORT can integrate with sales channels and other management platforms by following the steps below.

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



The integrations on ZORT are divided into four categories:

- Marketplace
- Social Commerce
- Website
- Accounting
- Fulfilment



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