ZORT User Guide

Contents

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

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

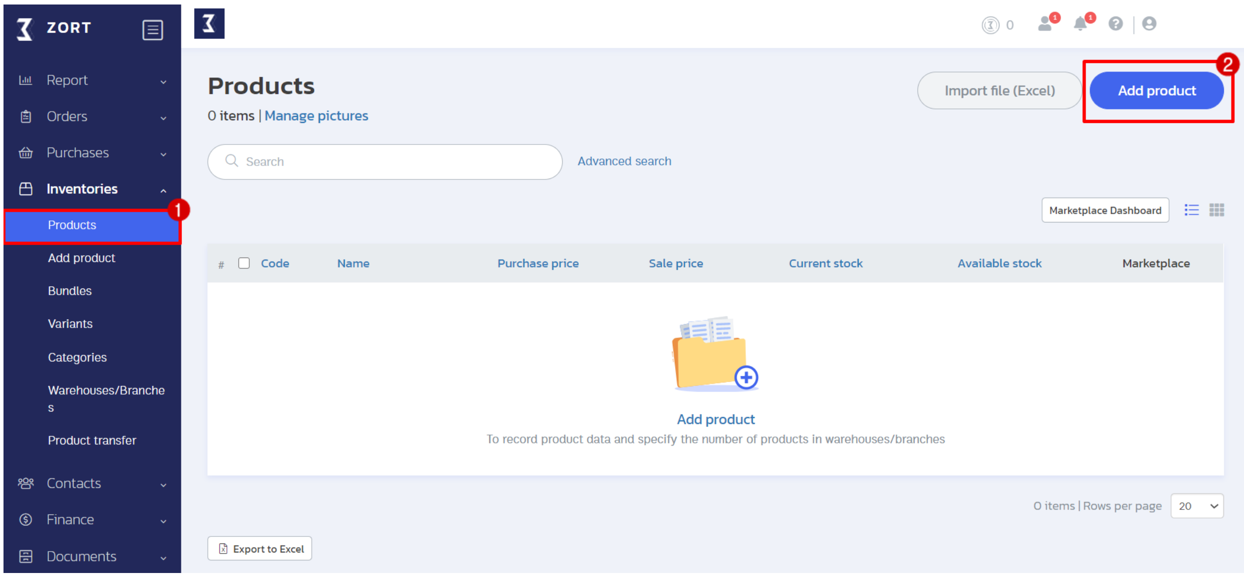
Integrate with Thailand's top shipping service providers such as Thailand Post, KERRY Express, Flash Express, J&T Express and so on. Print out shipping labels and pack your items faster with ZORT barcode system.

Products

Creating Products

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

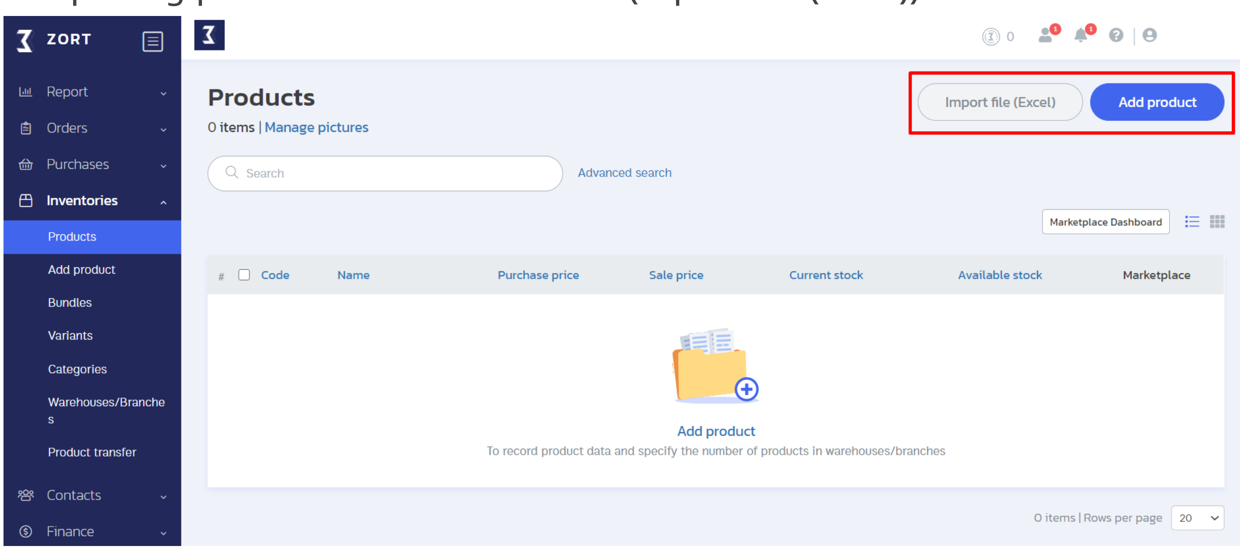
1. Go to the "Products" menu.



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

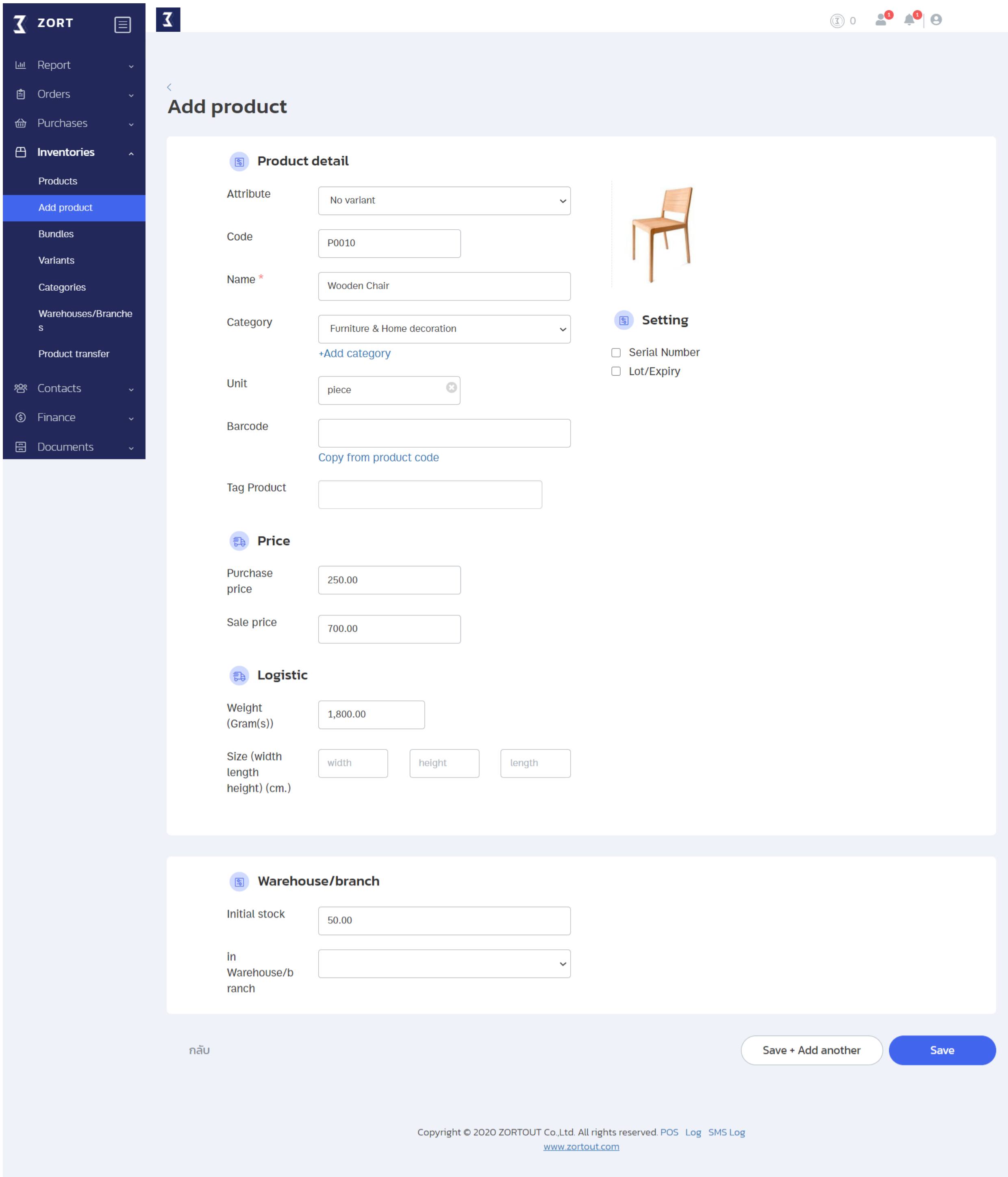
1. Adding one product at a time (Add product).

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



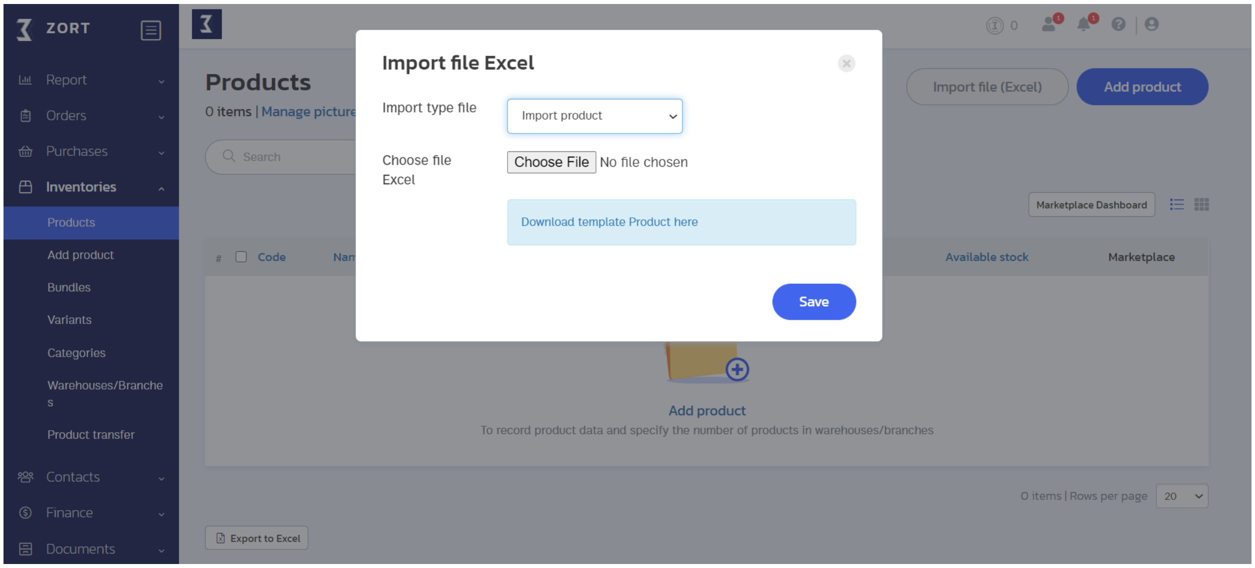
1. Adding one product at a time (Add product).

Fill in all the necessary details.

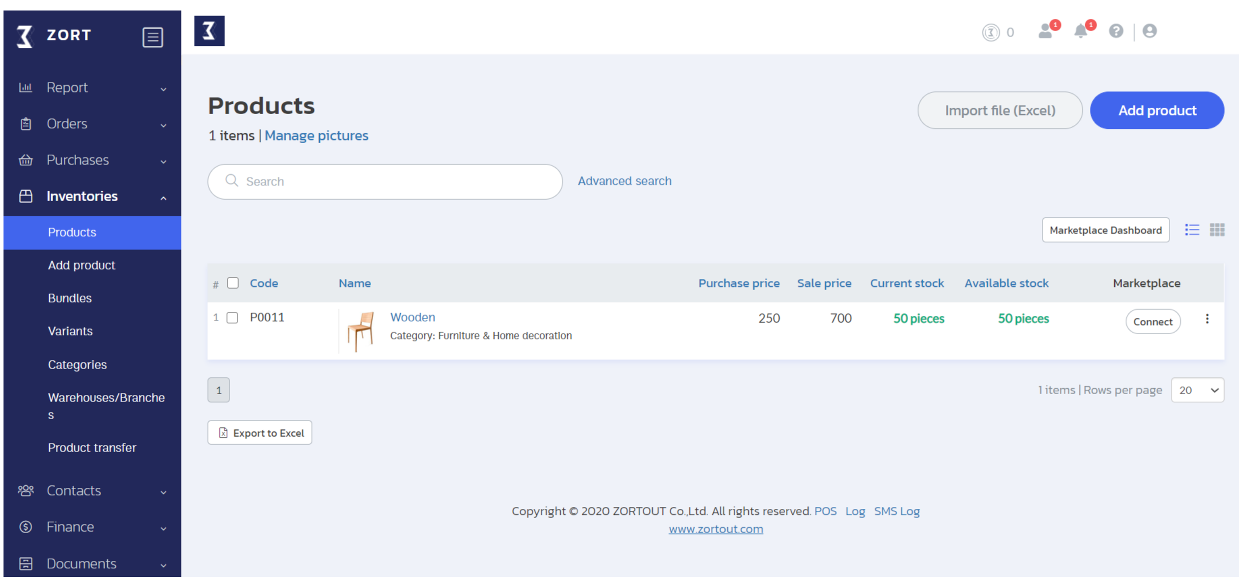


2. Importing products from an Excel file (Import file (Excel)).

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.



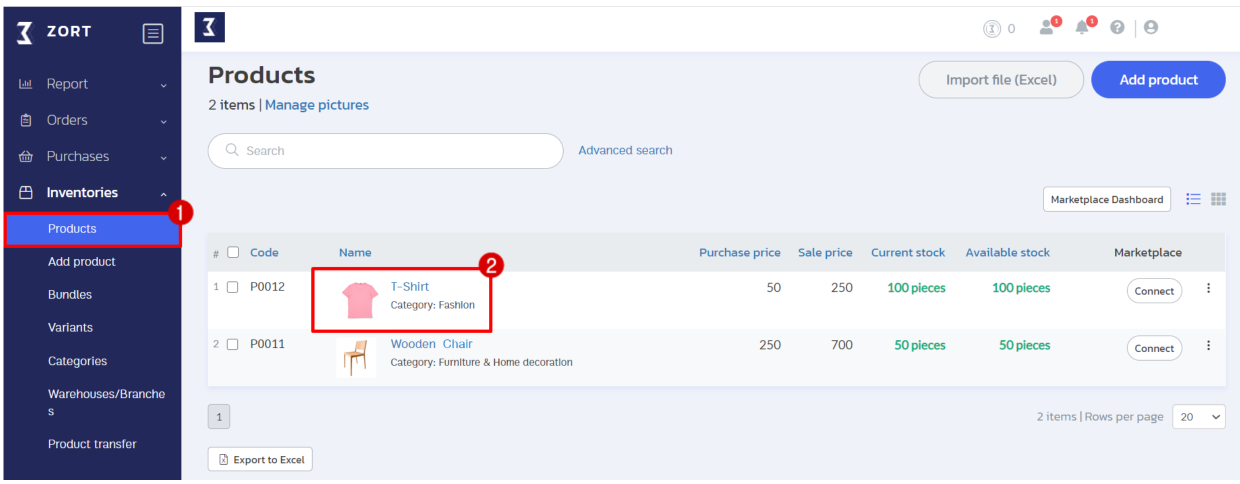
Once you complete filling in all the required information, click on "Save." Your recently created product will appear as in this picture.



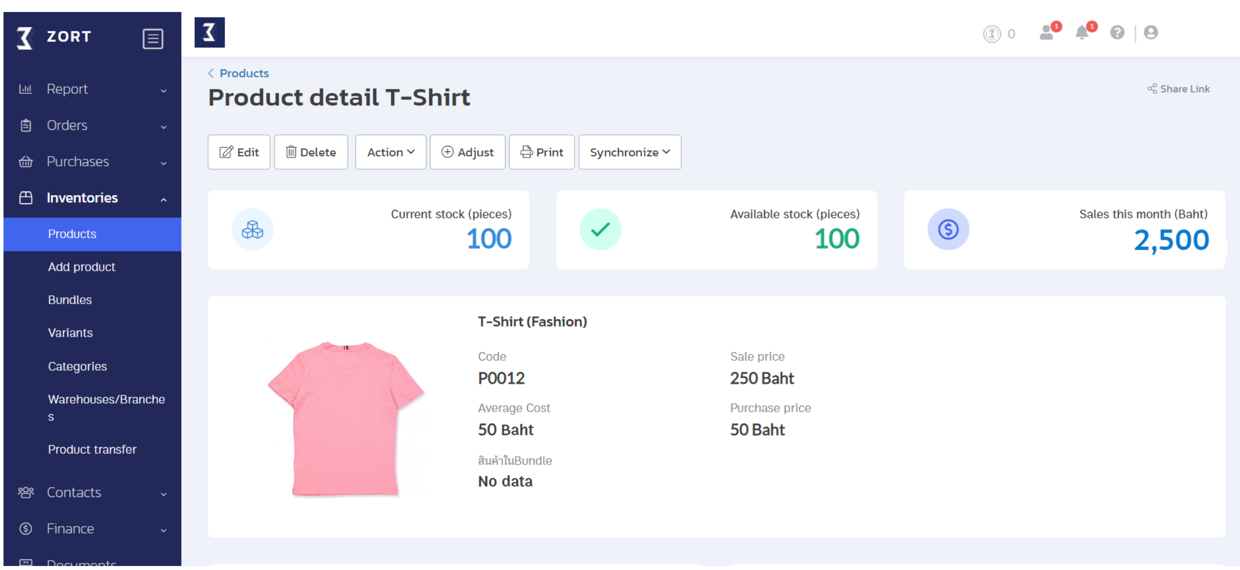
Viewing Product Details

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.

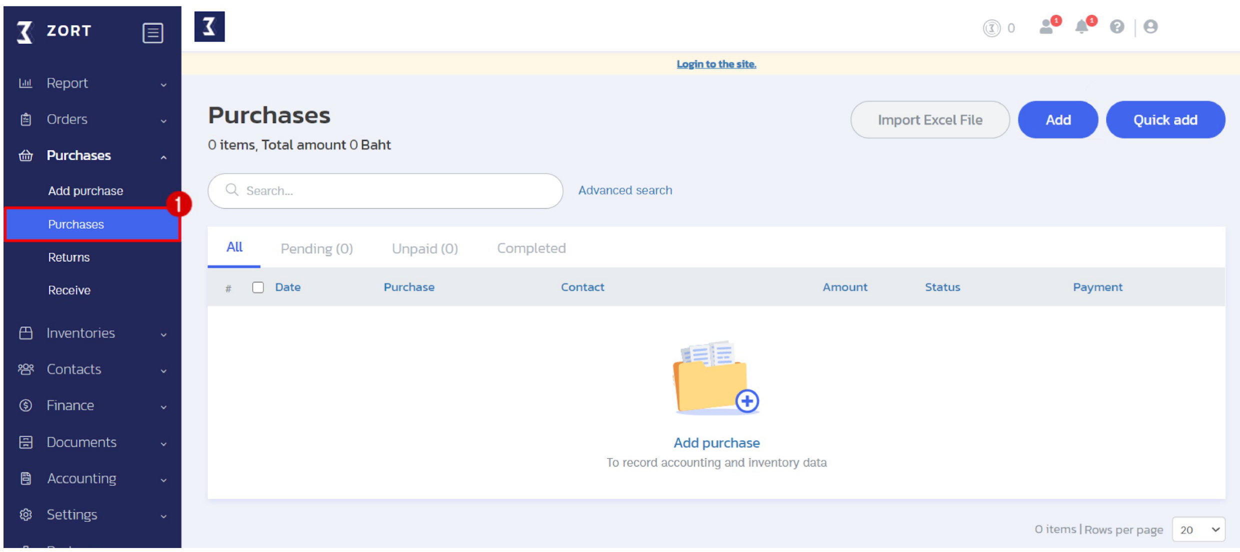


Purchase Orders

Creating Purchase Orders

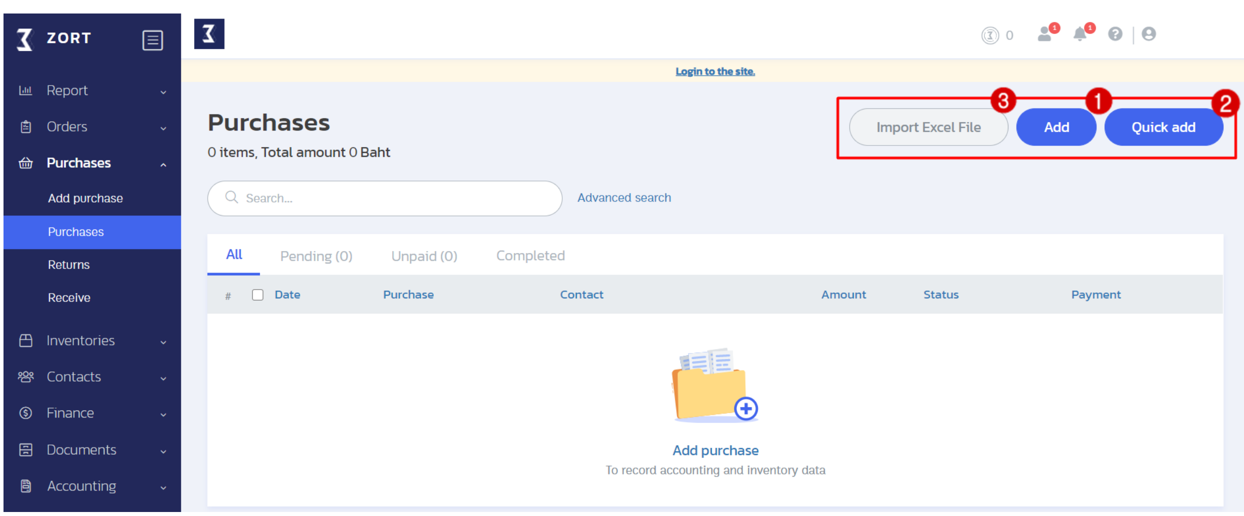
After you set up your inventories, you can input the stock quantity and record your purchase history in order to have the ZORT system calculate costs and profits of each item.

1. Go to the “Purchases” menu and select “Purchases.”



There are 3 possible ways to create sales orders:

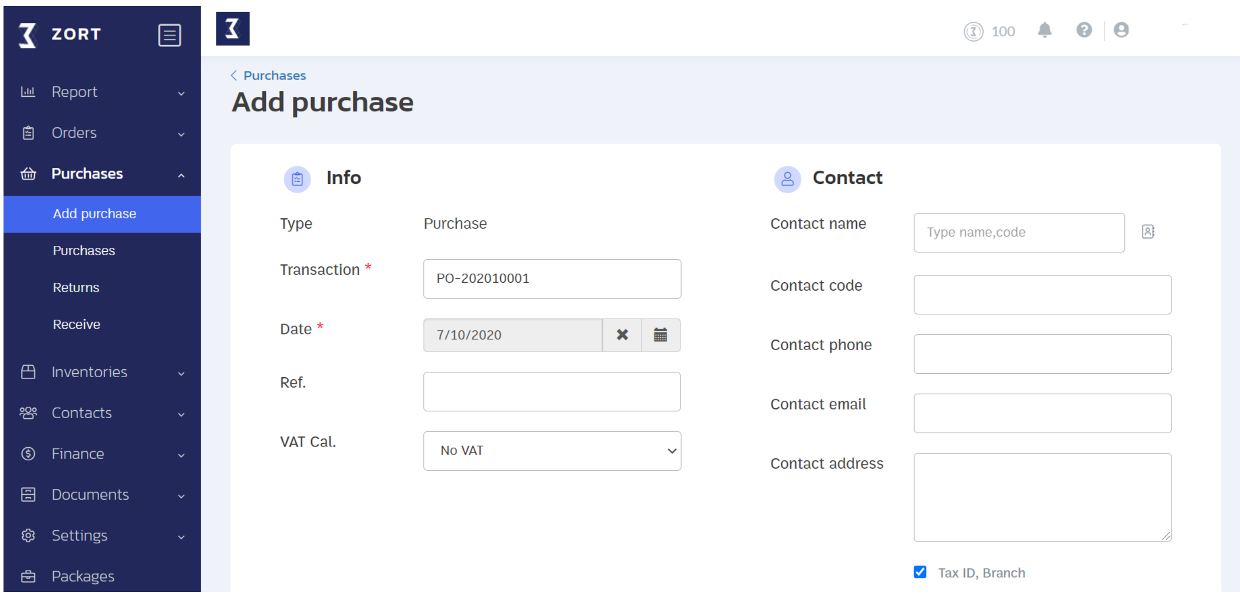
1. Creating 1 purchase order at a time (Add).
2. Creating a quick sales order (Quick add)
3. Importing purchase orders from an Excel file (Import Excel File).



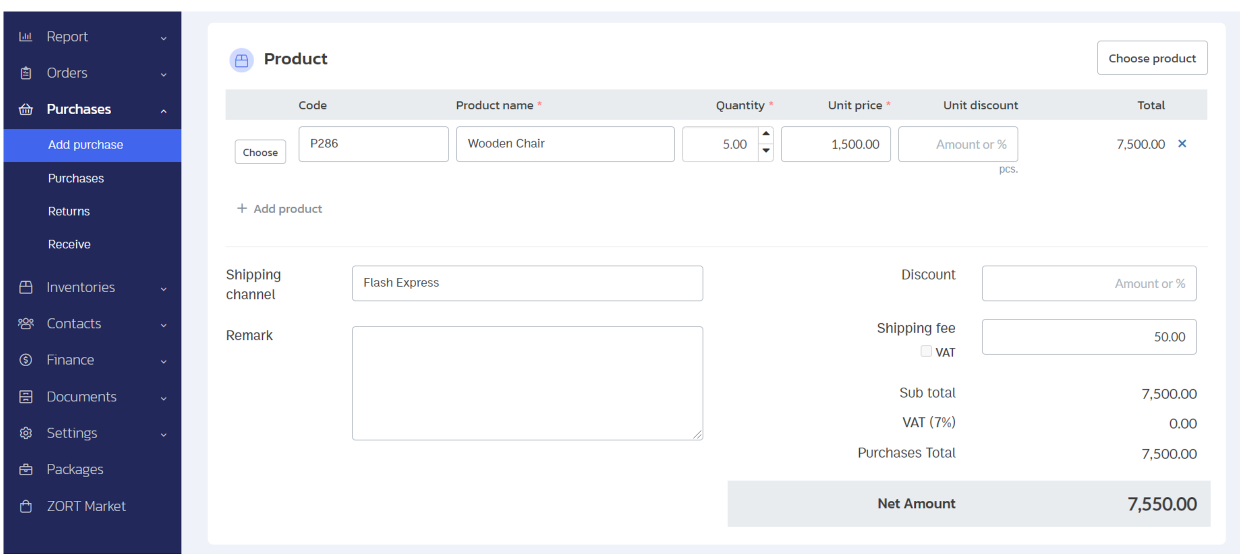
1. Creating 1 purchase order at a time (Add).

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.

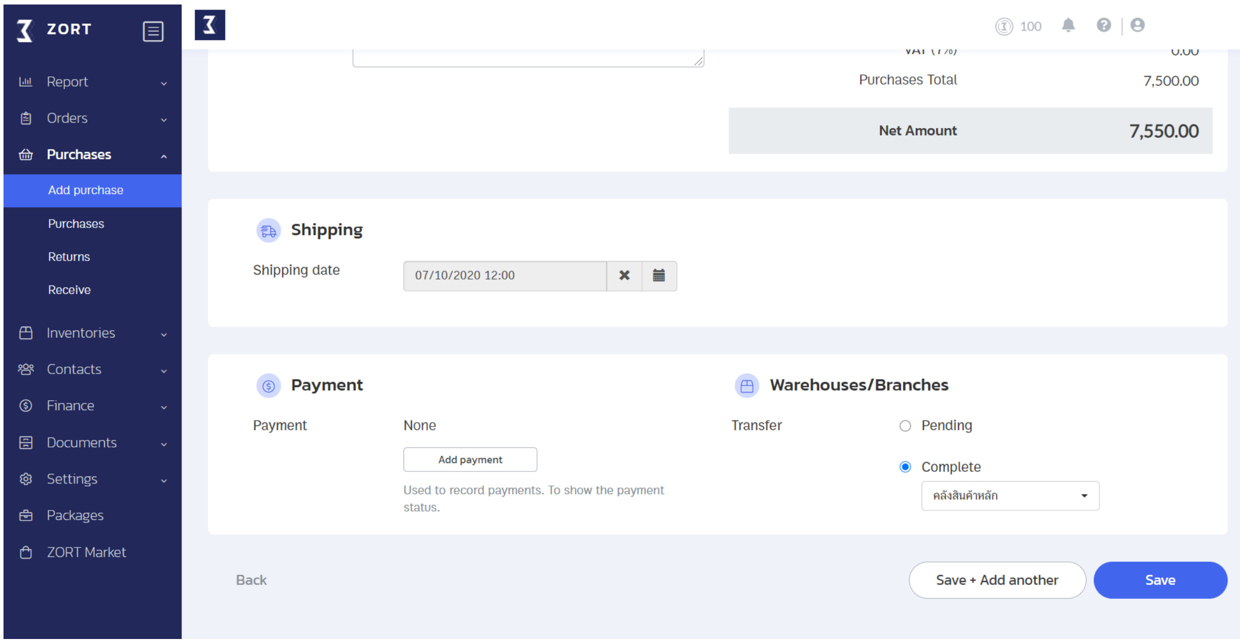
Section 1 : Document details such as the transaction number, date, type of VAT, and contact info.



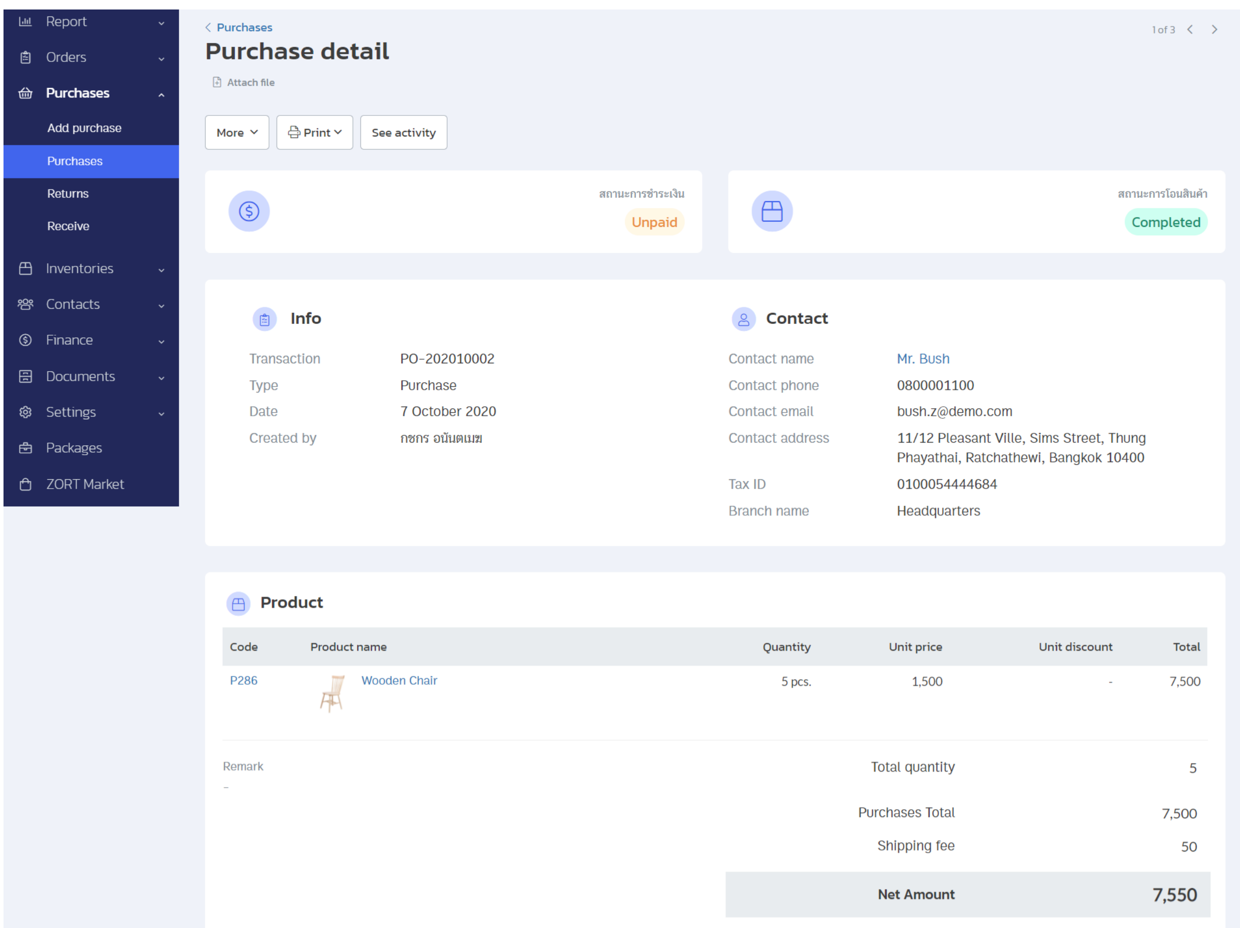
Section 2 : Product detail, product code, product name, price, and discount.



Section 3 : Shipping, payment and transferring status.

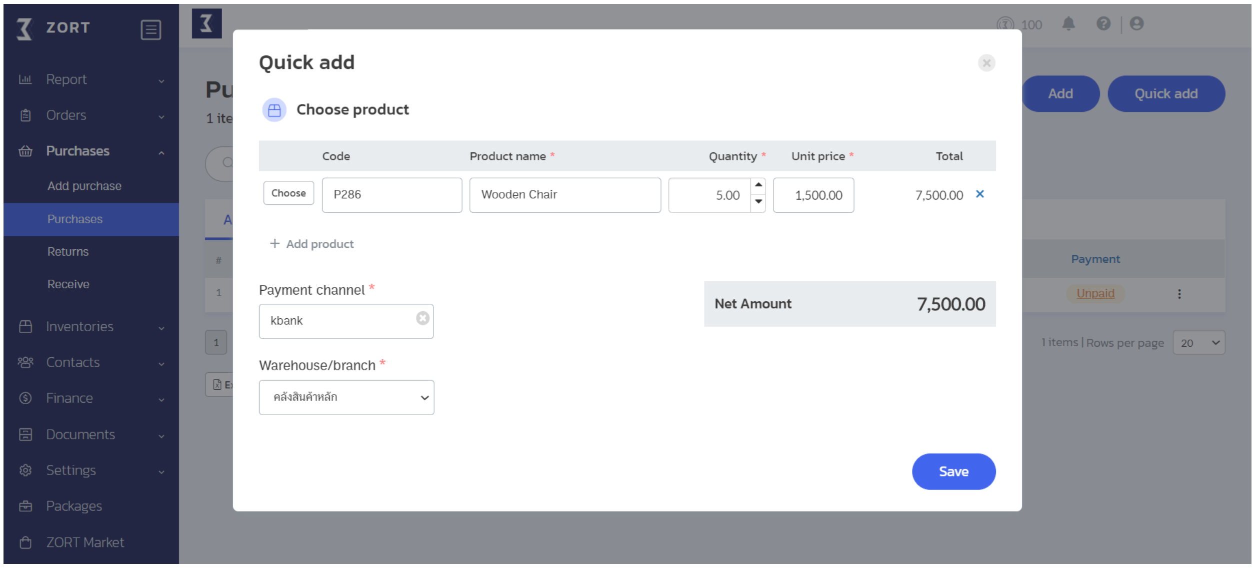


Once you save the changes, the purchase order will appear as in the picture.



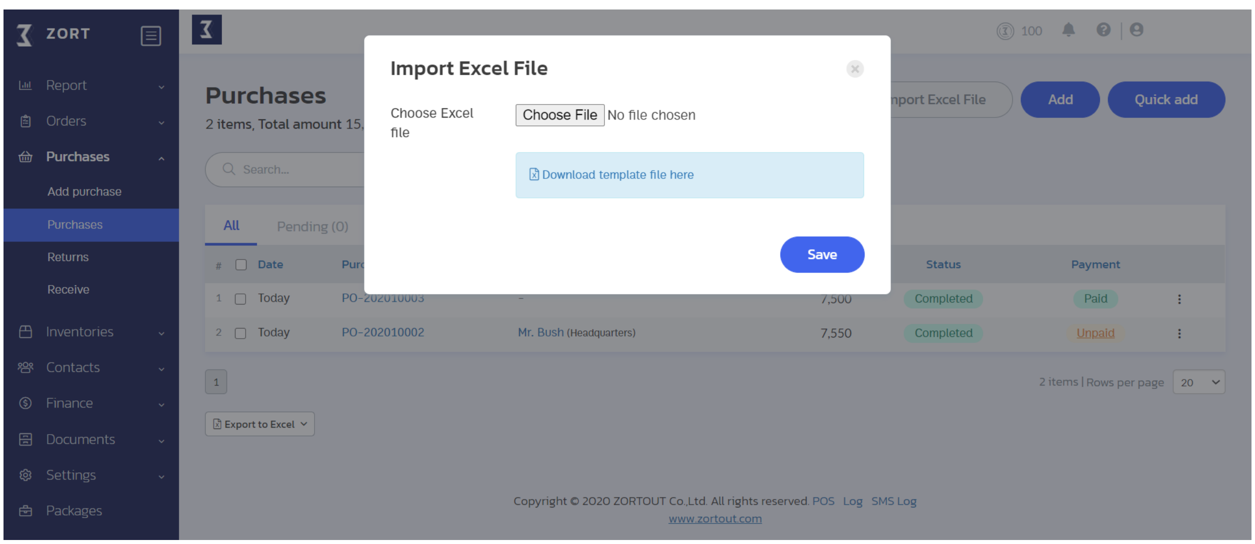
2. Creating a quick purchase order (Quick add).

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).

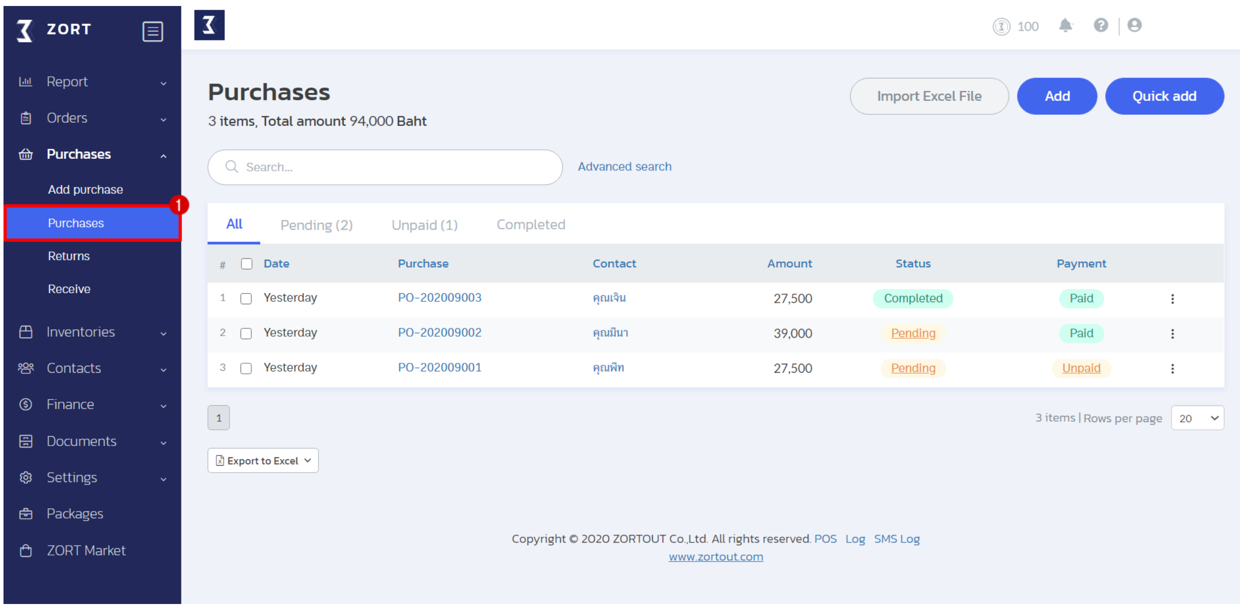
To import purchase orders from an Excel file, you need to download a template from the ZORT system to import data in a valid format.



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.



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

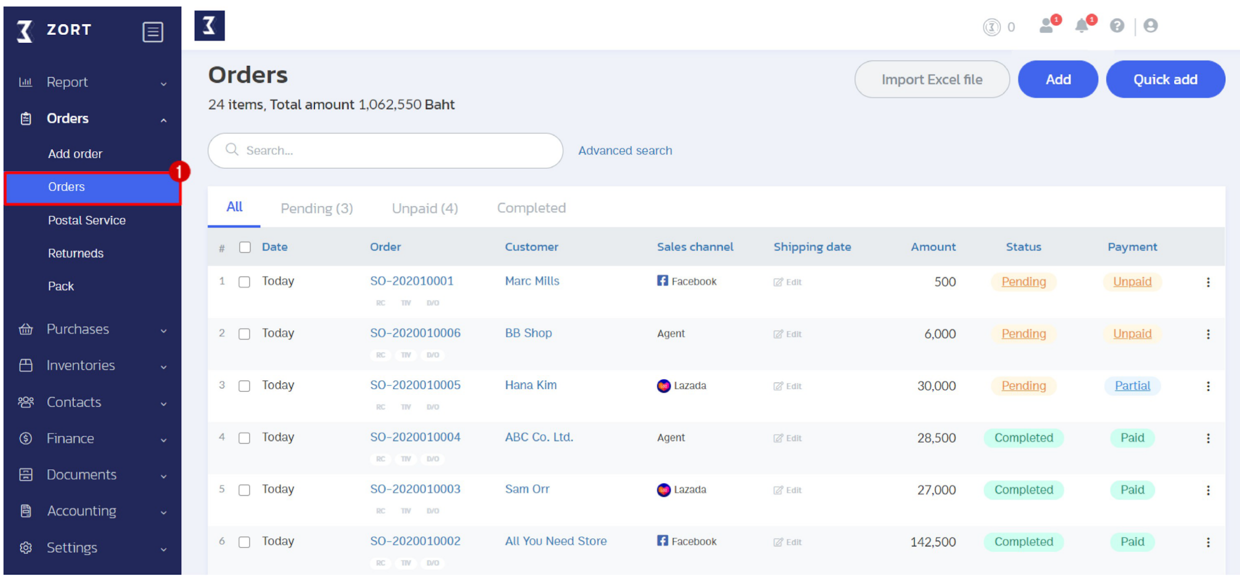
- Paid : The full amount has been paid.
- Partial : Only some of the amount has been paid.
- Pending : Waiting for the payment.
- Cancelled : The payment has been cancelled.

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."

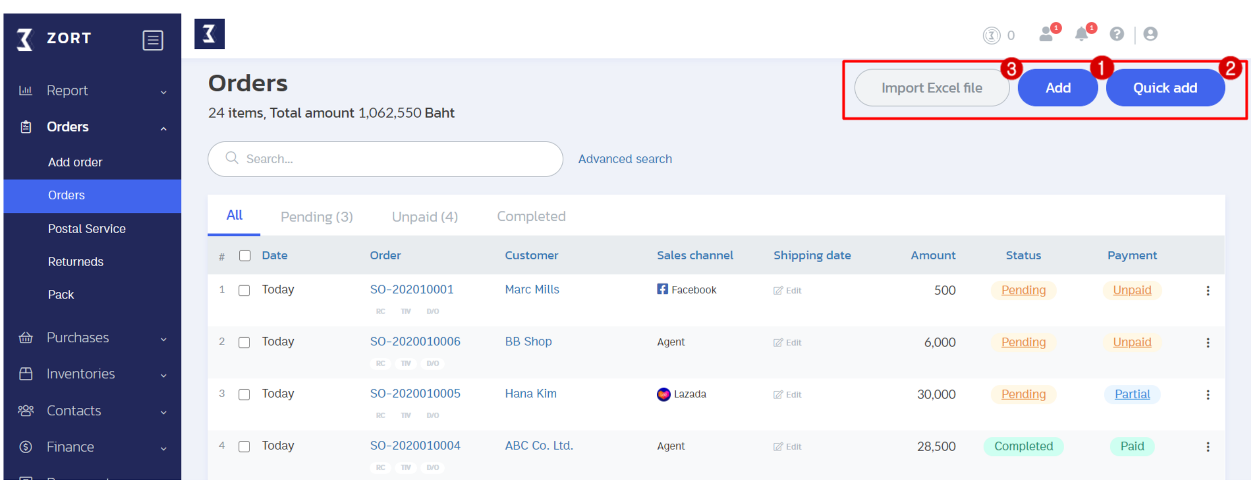


There are 3 possible ways to create sales orders:

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

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

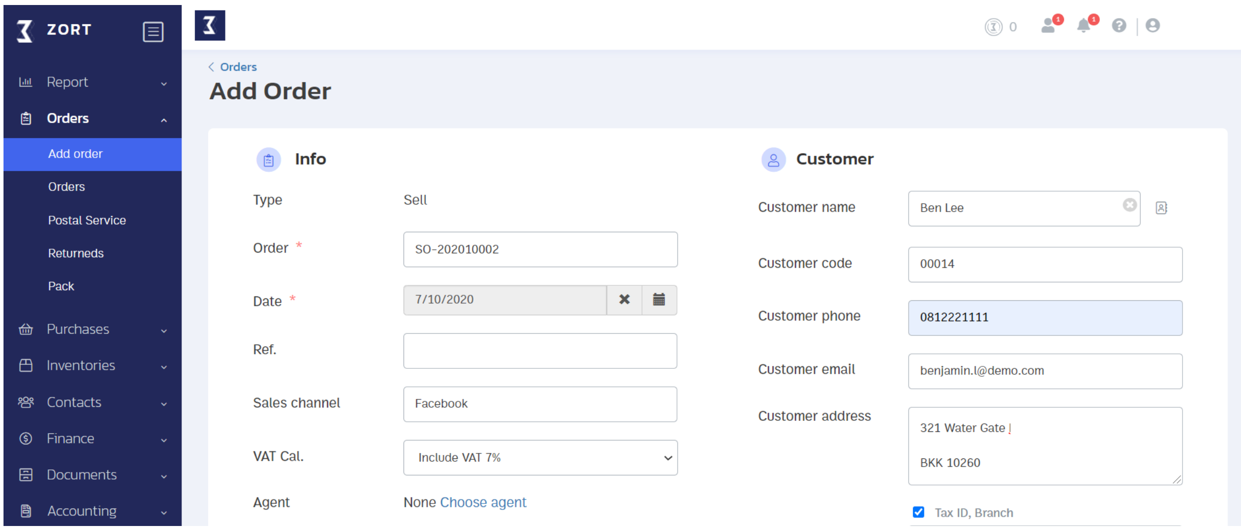
3.) Importing sales orders from an Excel file (Import Excel file)



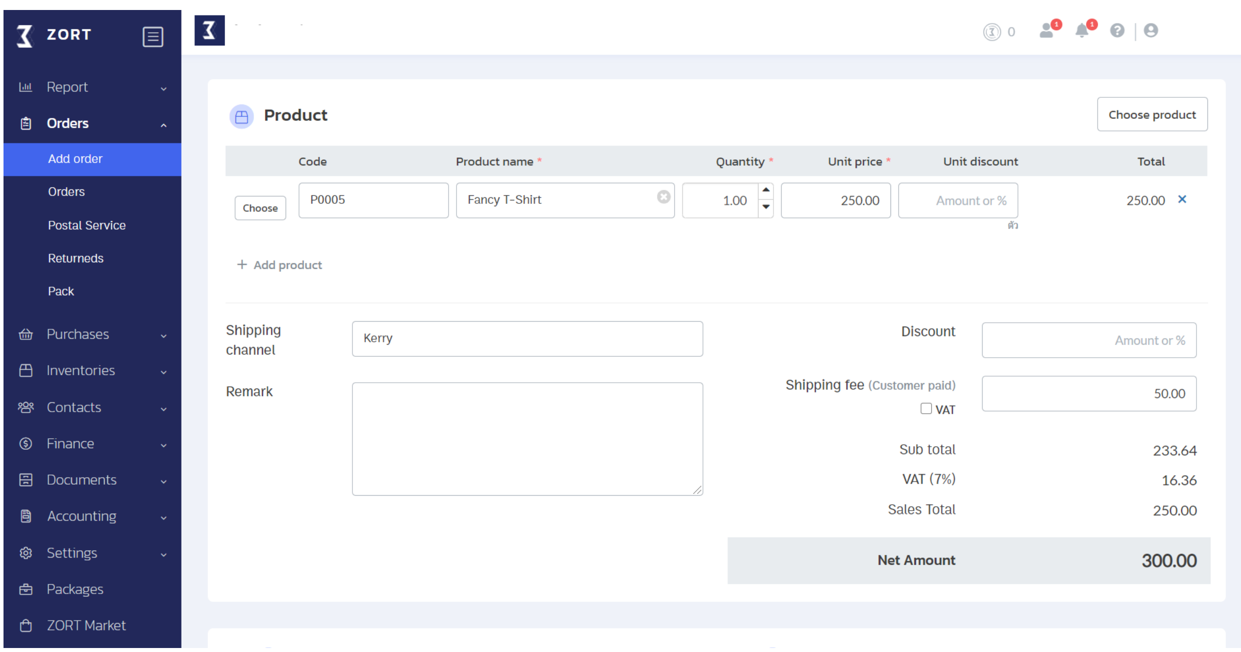
1. Creating one sales order at a time. (Add)

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.

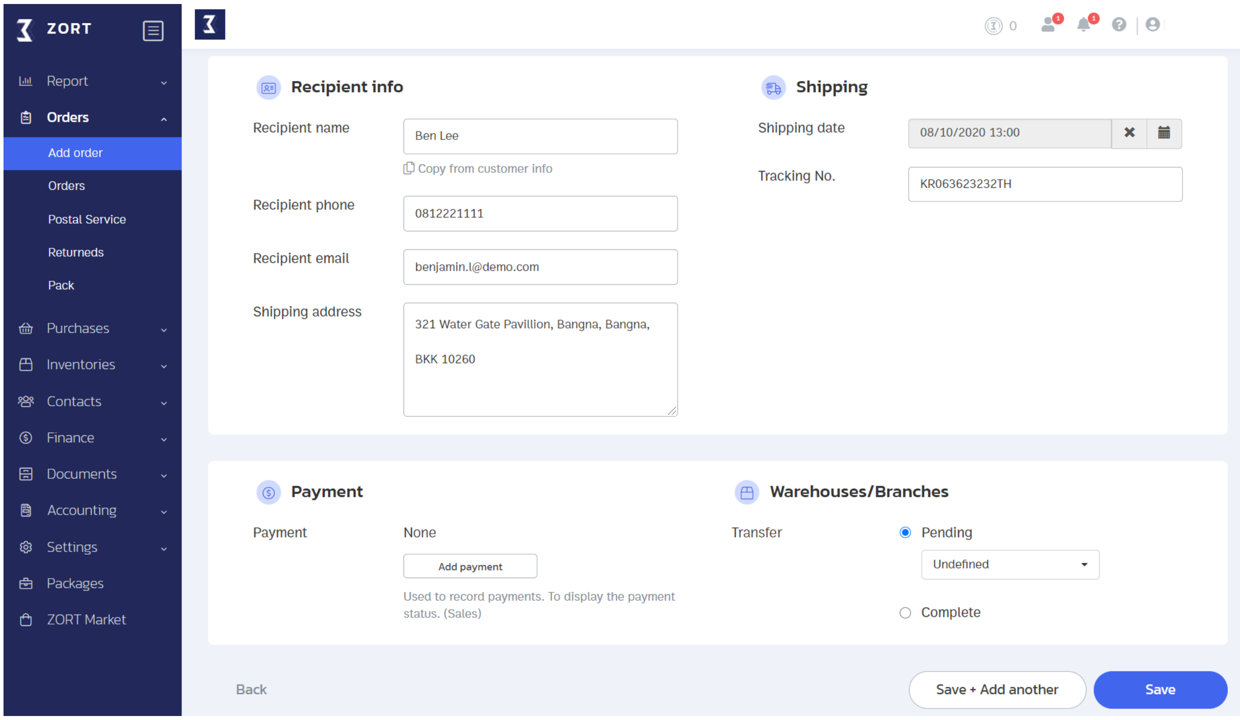
Section 1 : Document details such as the transaction number, date, type of VAT, and customer info.



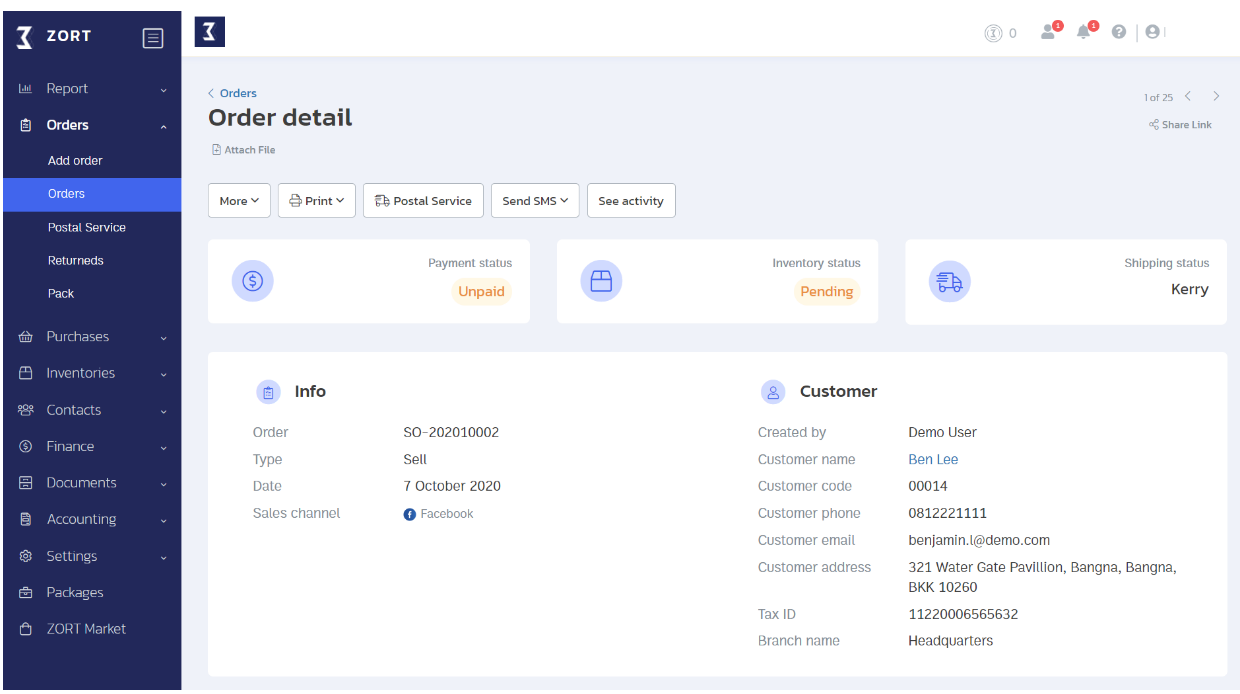
Section 2 : Product detail, product code, product name, price, and discount.



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

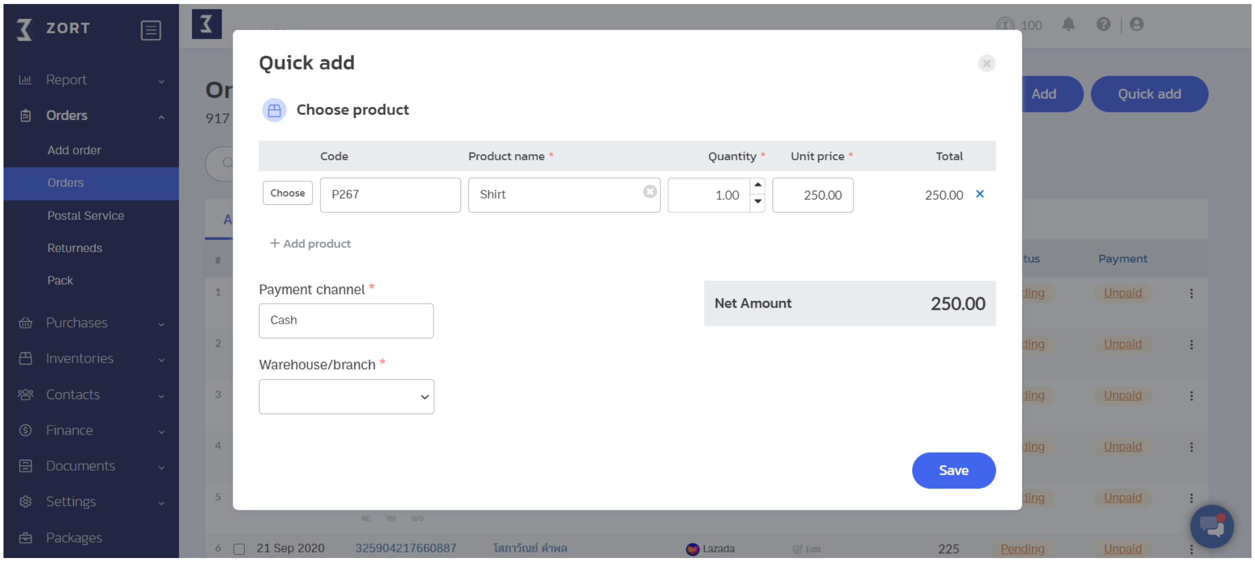


Once you save the changes, the sales orders created will appear as in the picture.



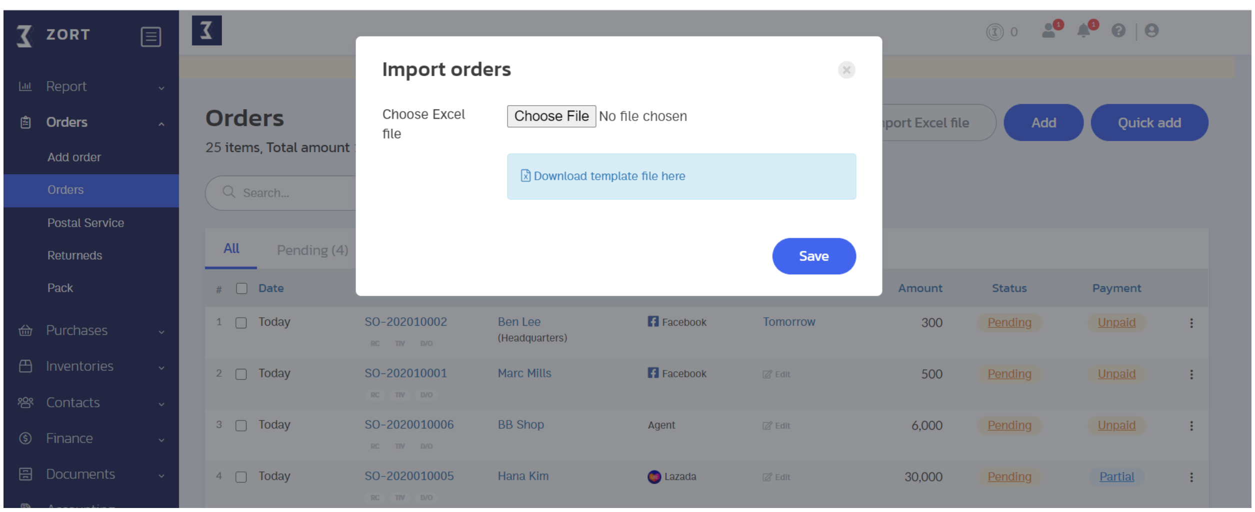
2. Creating a quick sales order (Quick add).

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.

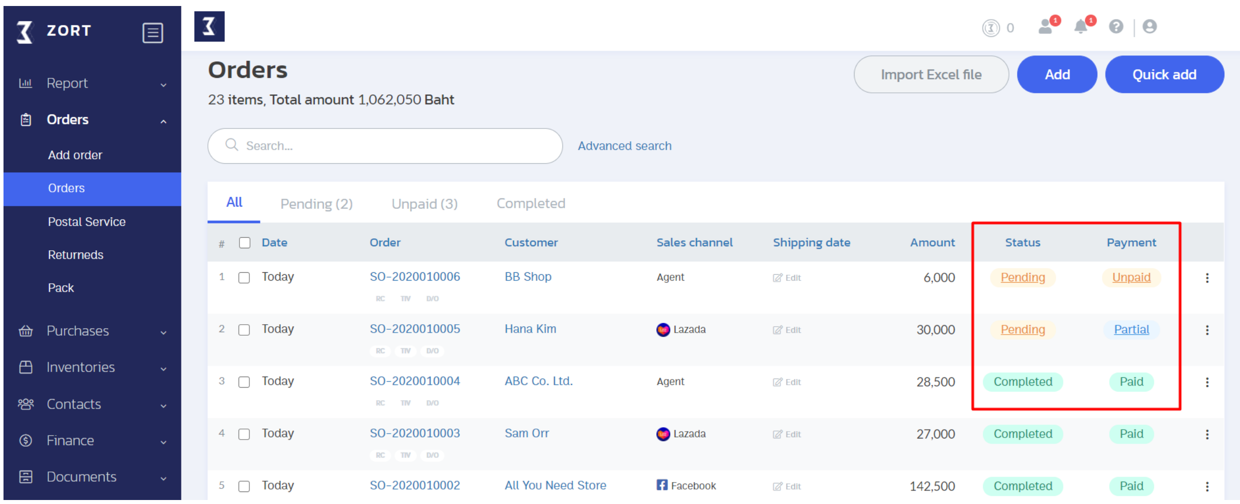


Viewing Sales Orders

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.



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

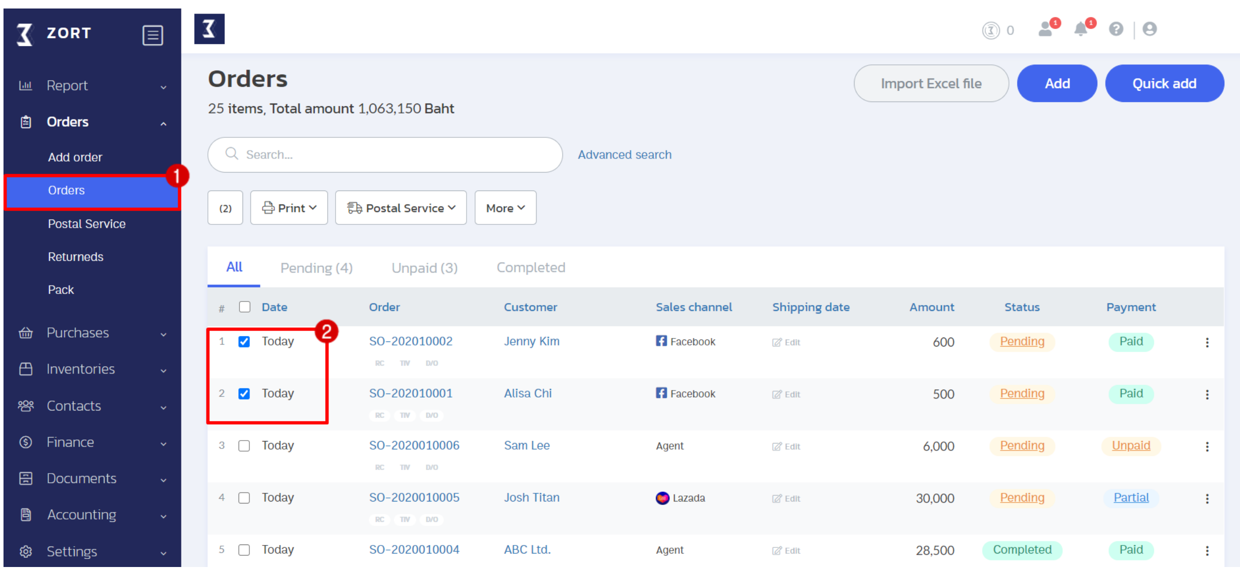
- Paid : The full amount has been paid.
- Partial : Only some of the amount has been paid.
- Pending : Waiting for the payment.
- Cancelled : The payment has been cancelled.

Shipping Items

Shipping Items on ZORT

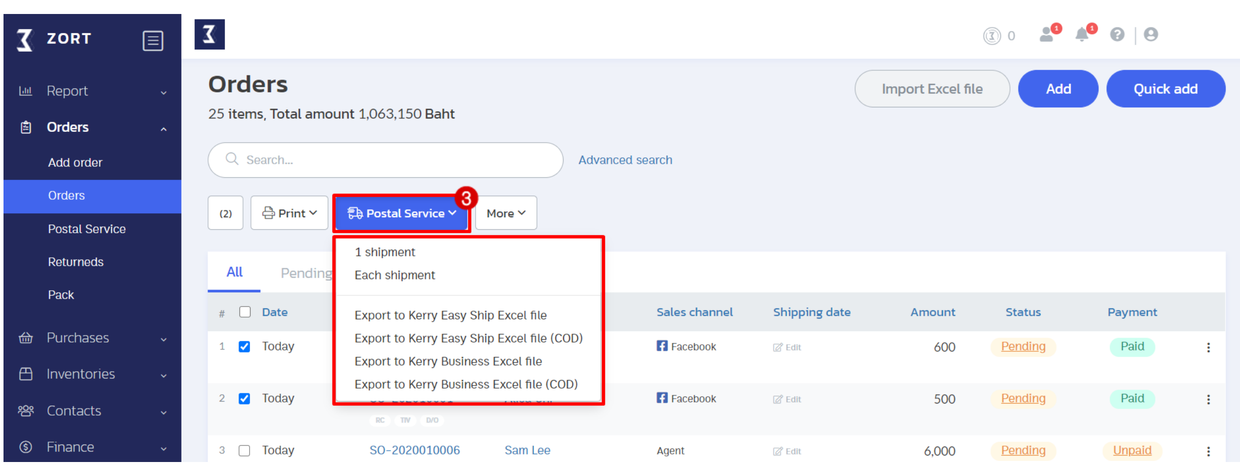
You can select a shipping carrier that suits your business needs directly from the ZORT system, where customers' info can be automatically extracted and put together in the recipient section.

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

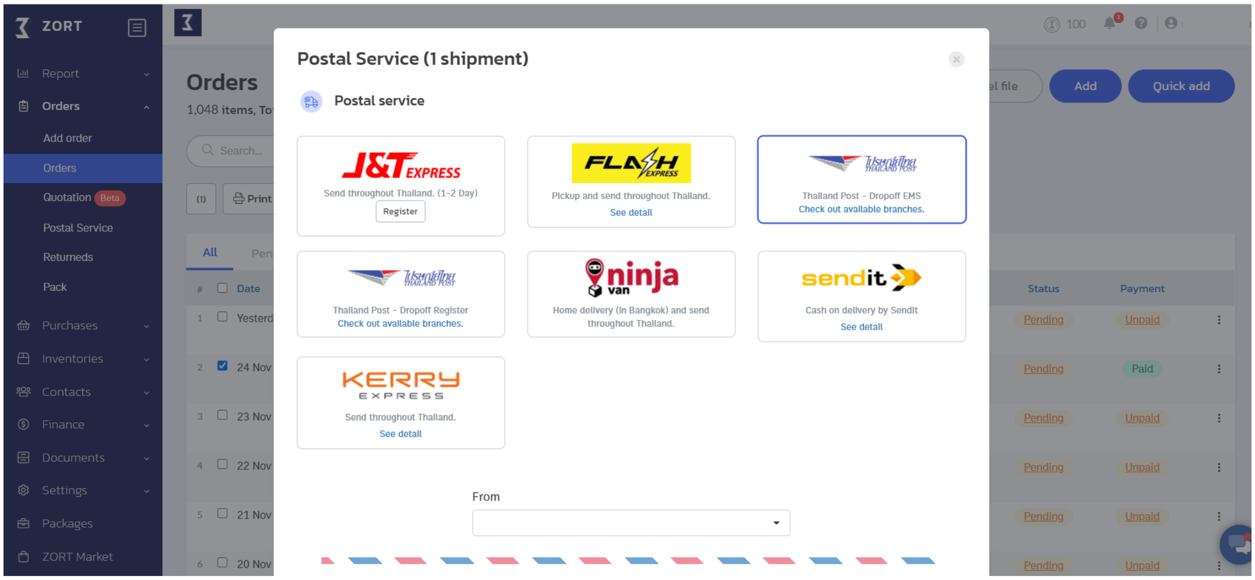


3. Click on "Postal Service."

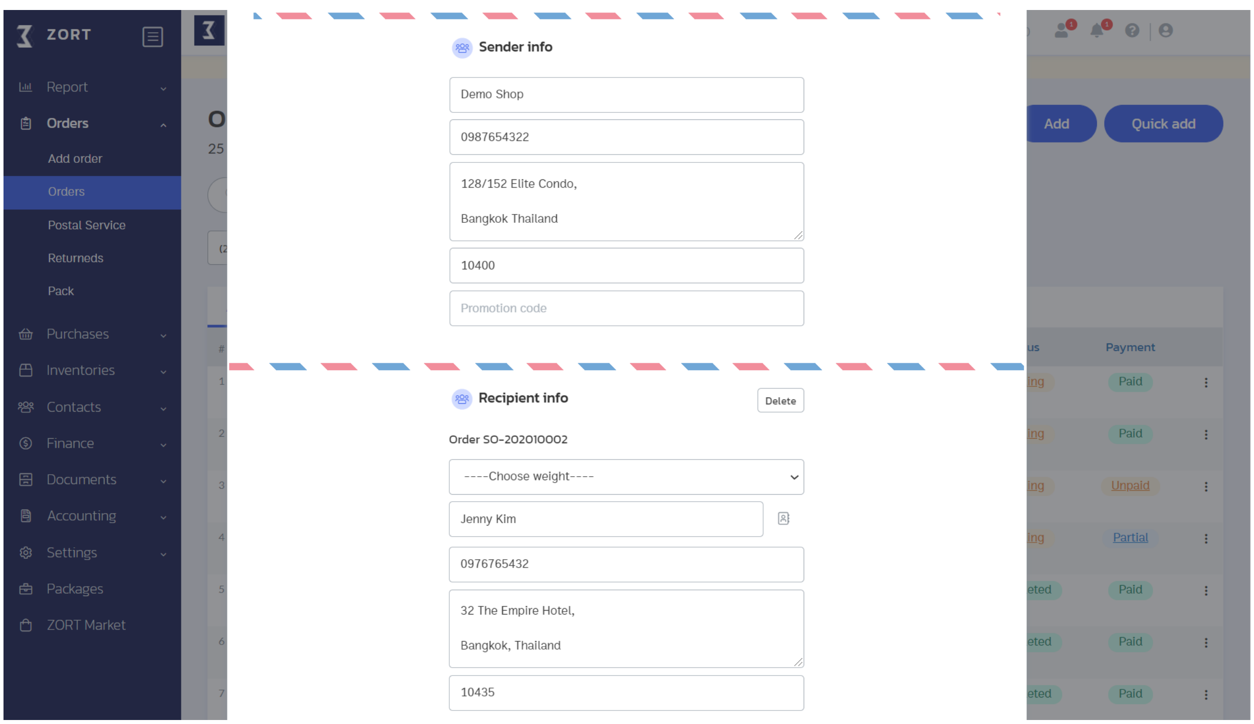
You can either choose to manage all items as one shipment or ship out each sales order separately.



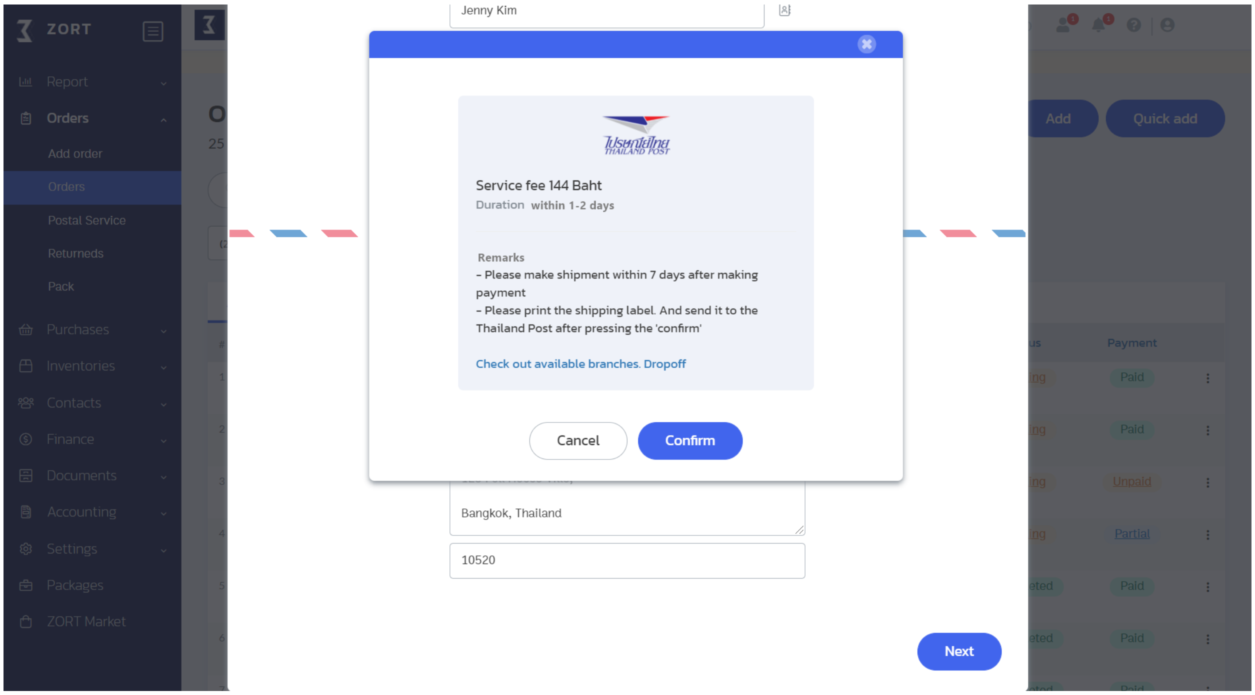
4. Select the shipping carrier you want.



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



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



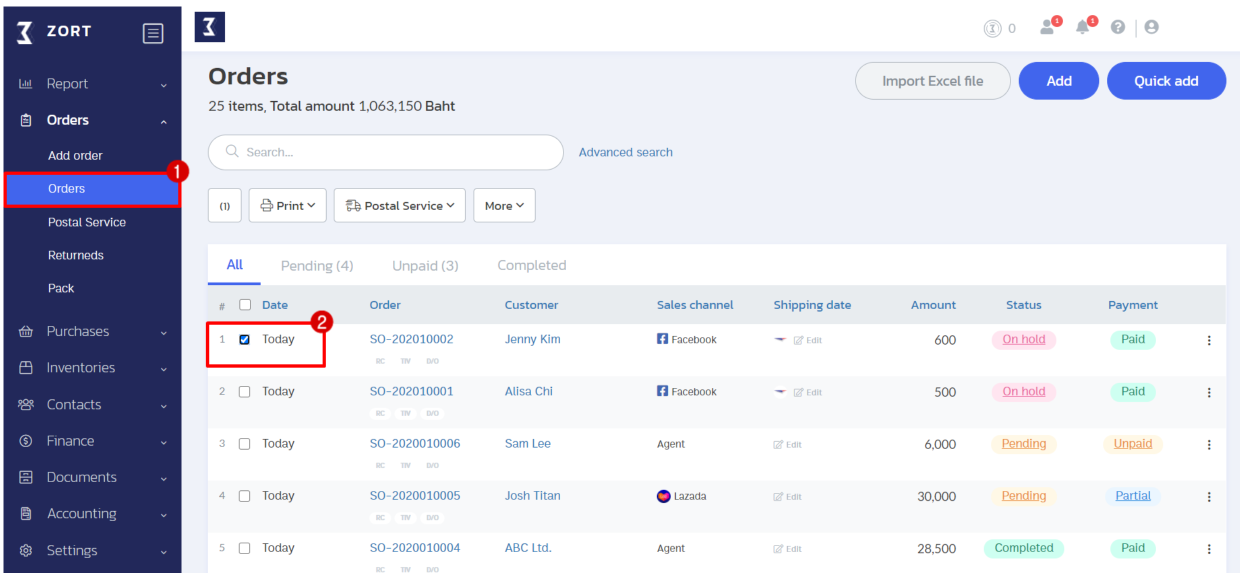
Remarks:

- 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.

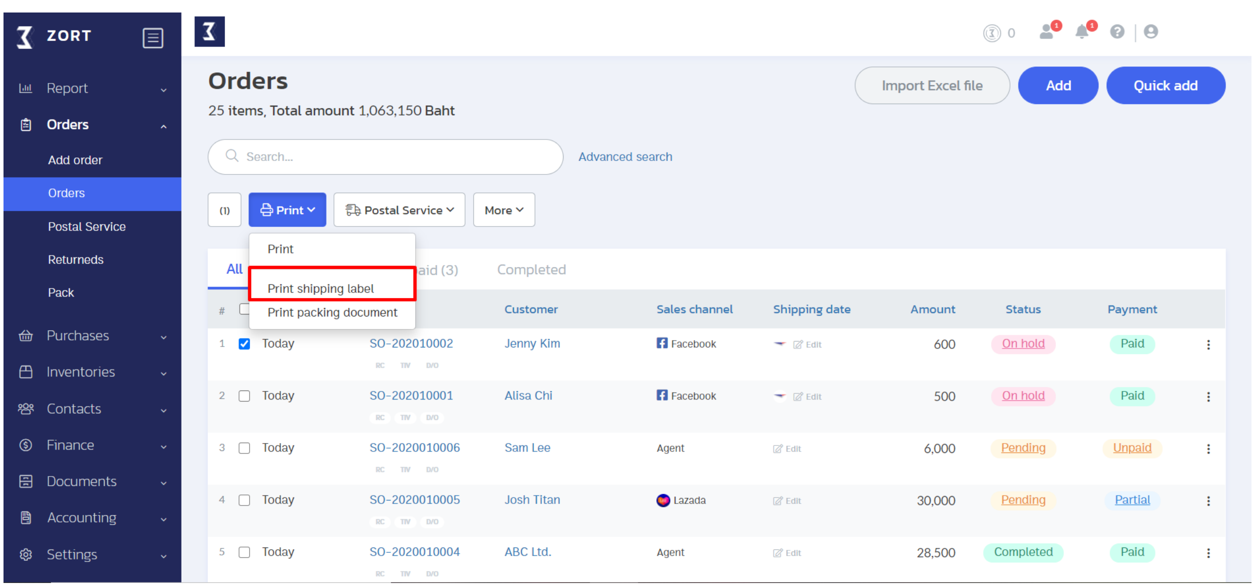
Printing Shipping Labels

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

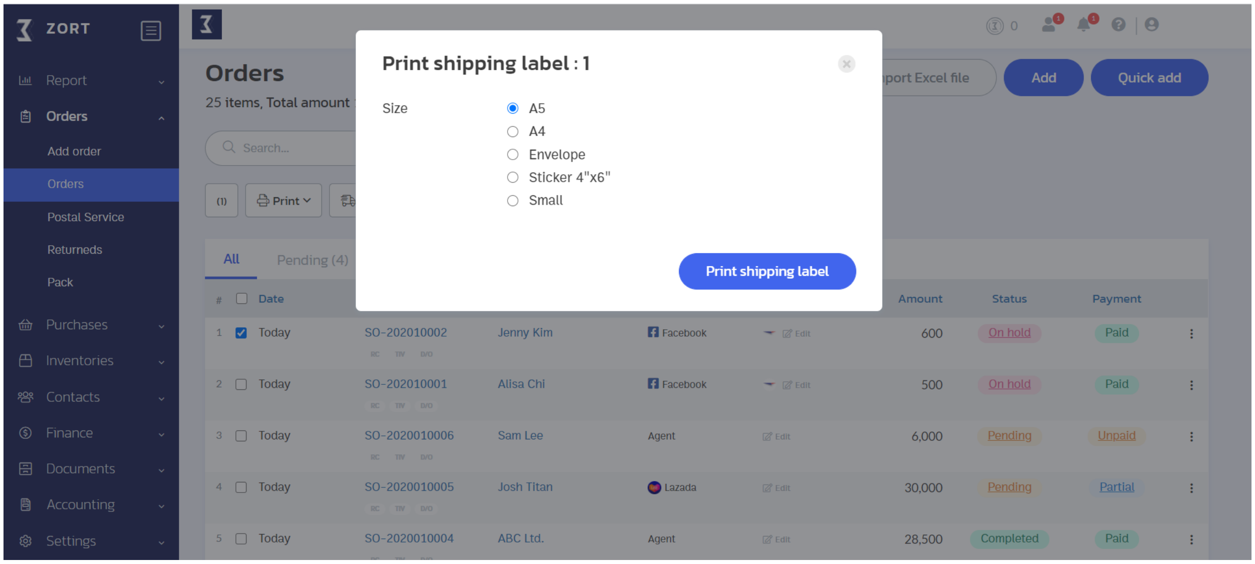
1. Go to the "Orders" menu and click on "Orders."
2. Select the sales orders of which shipping labels you want to print out.



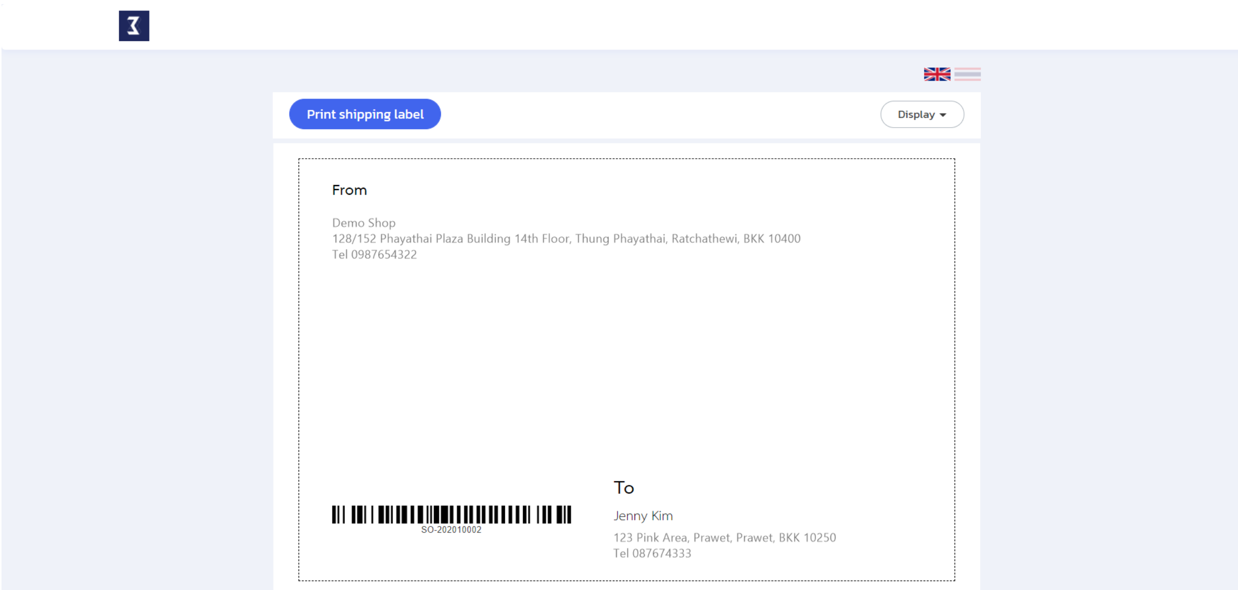
3. Click on "Print" then select "Print shipping label."



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.

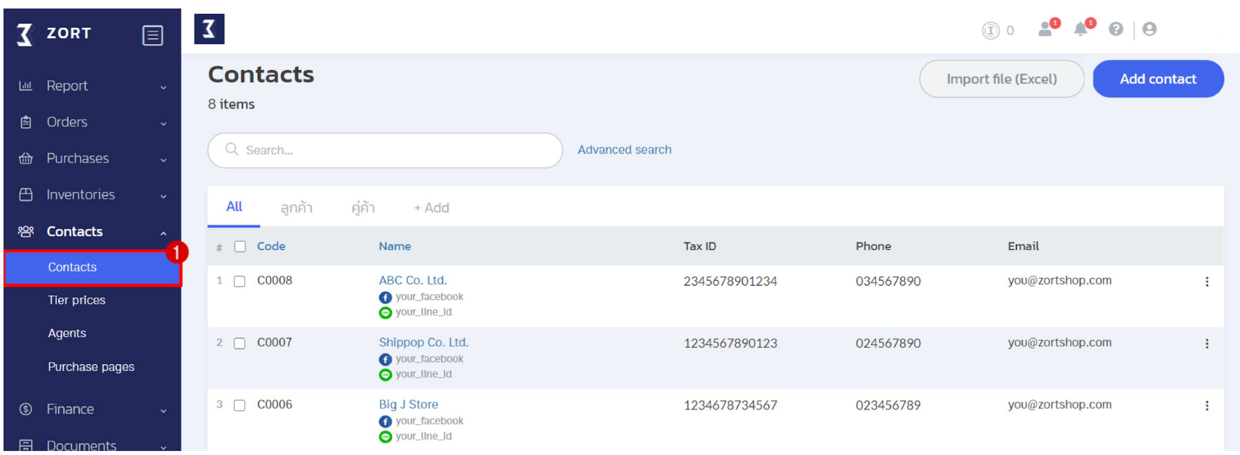


Contacts

Adding Contacts

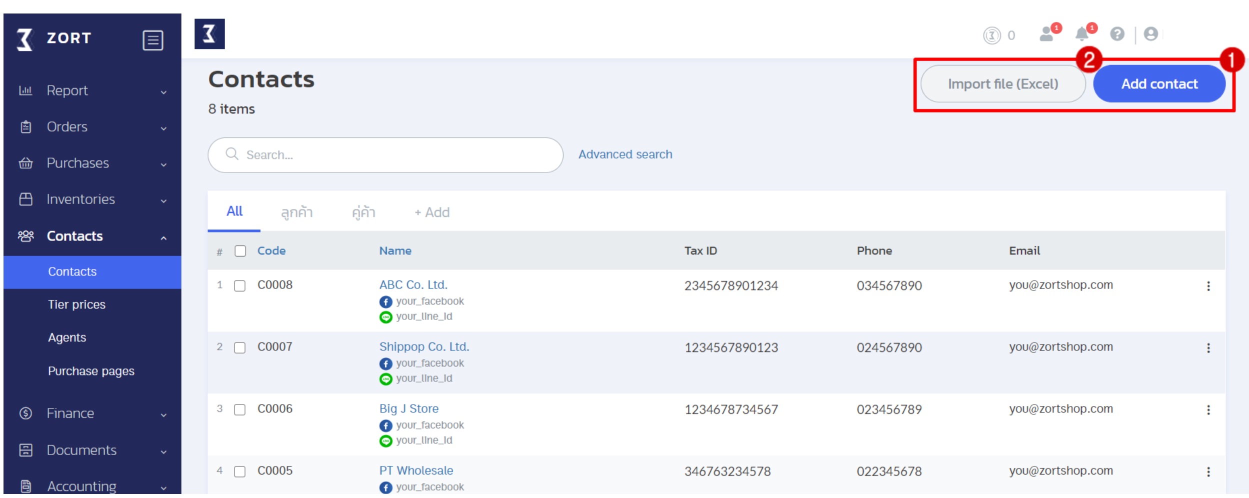
Whenever a transaction is made on ZORT, the information of the customer/contact will be automatically saved in the system. Alternatively, if your store already has a contact list, you can import it into the system by following the steps below.

1. Go to the “Contacts” menu and select “Contacts.”



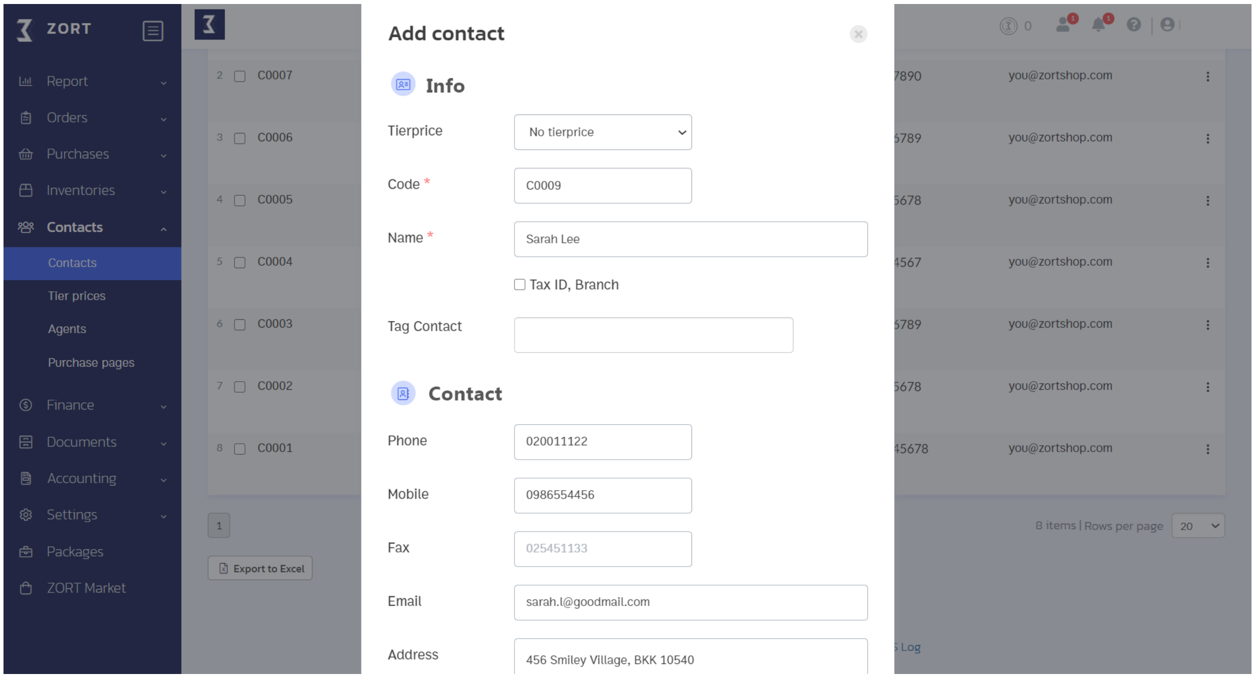
There are 2 possible ways to add contacts:

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



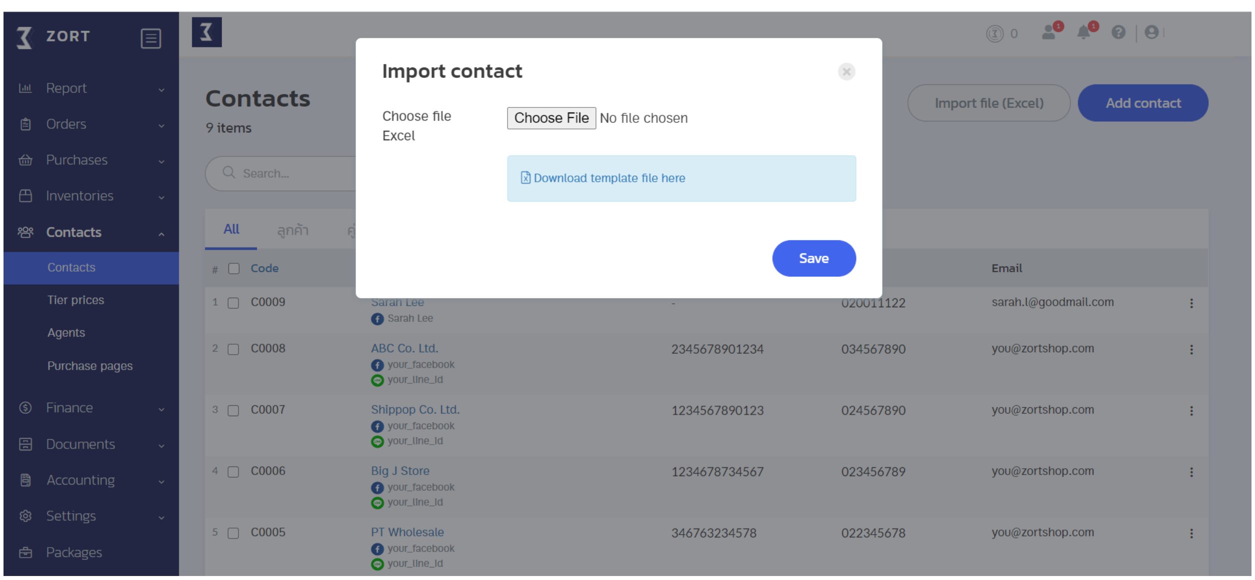
1.Adding one contact at a time. (Add contact)

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



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.

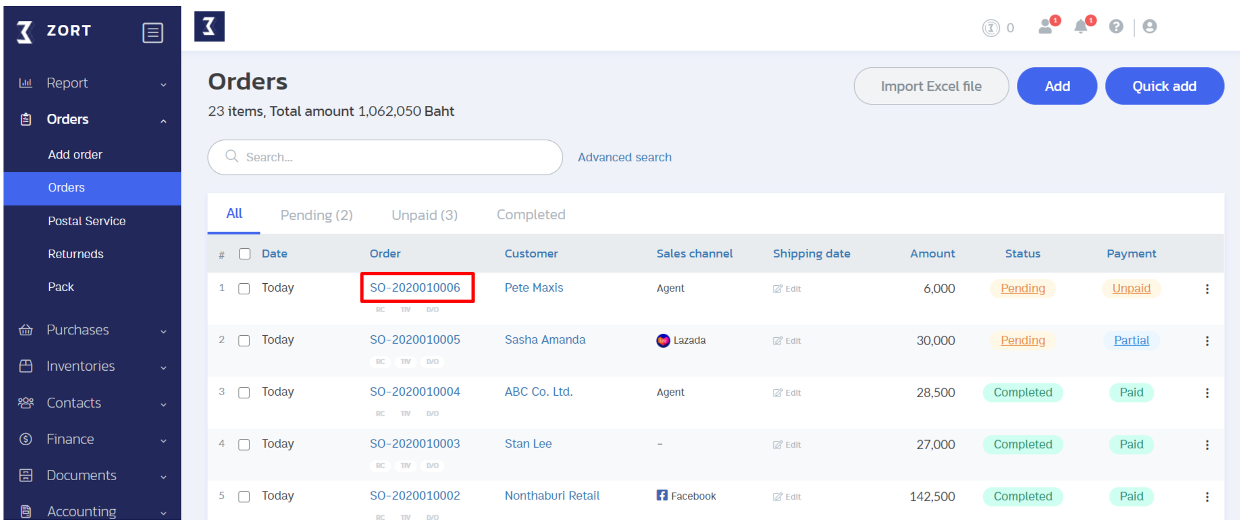


Documents

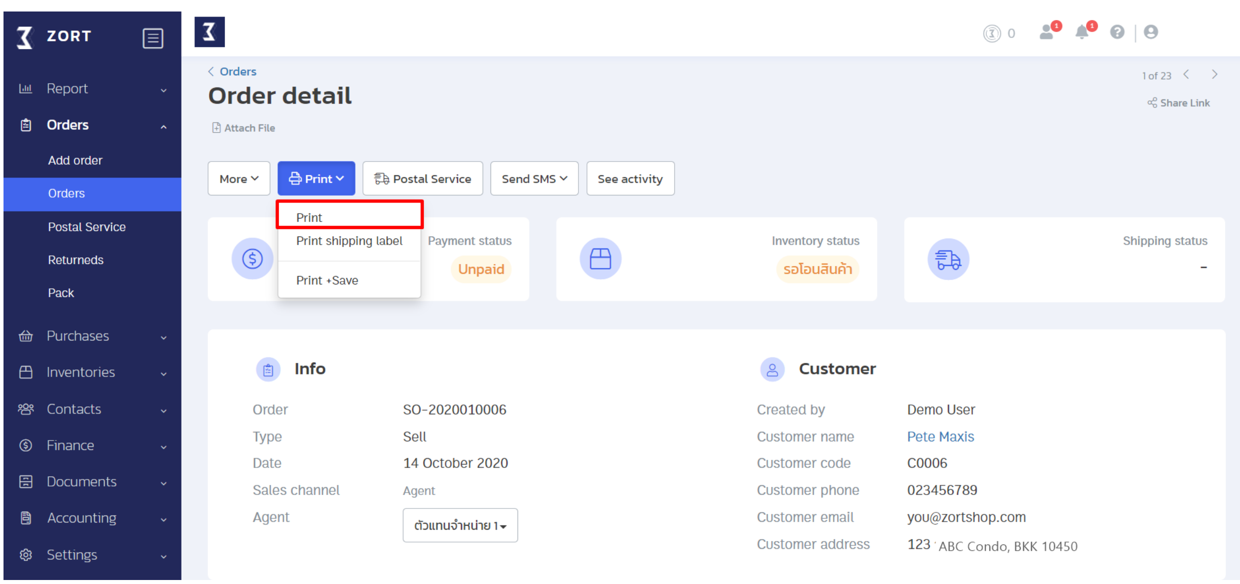
Printing Documents

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

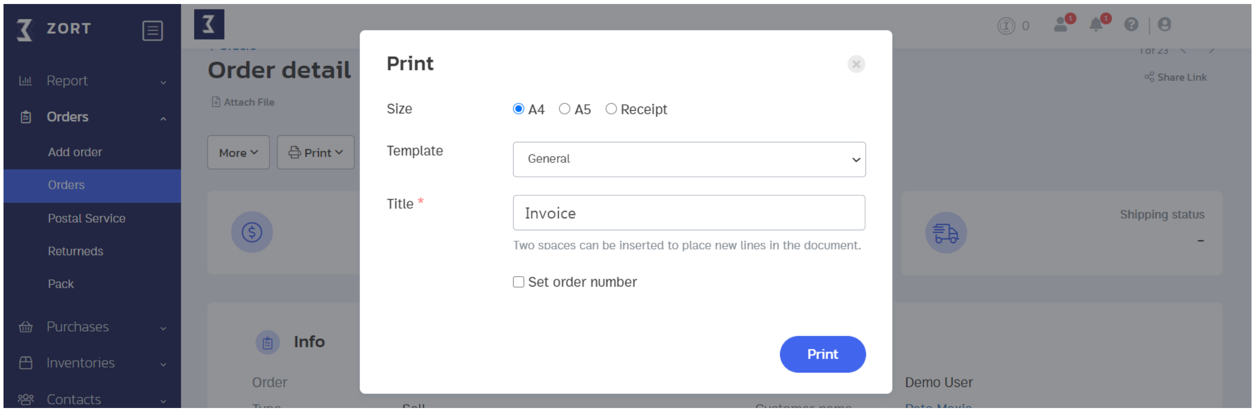
1. Select the item(s) of which document you would like to print out (You can either select from sales orders or purchase orders.).



2. Click on “Print” and select “Print.”

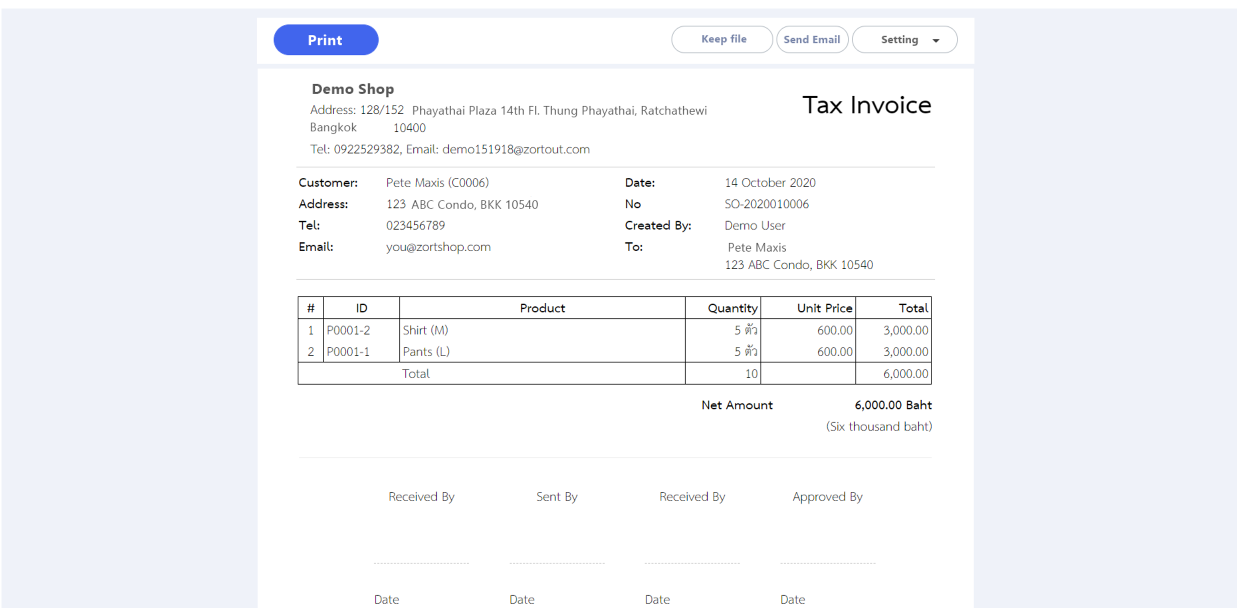


3. Choose the size, format, and title of your document.

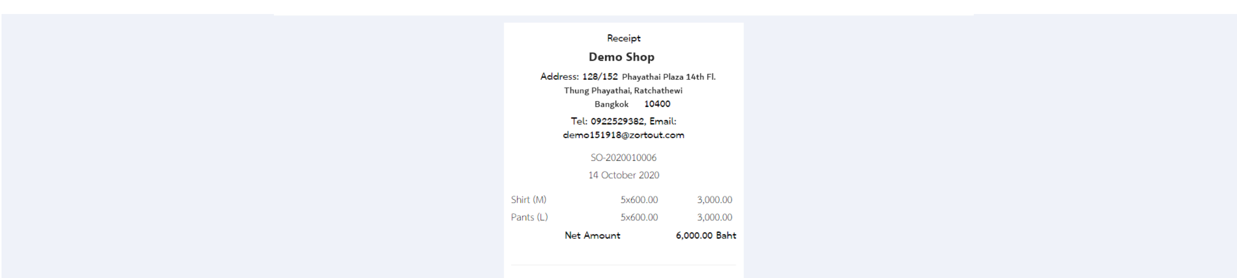


4. Click on "Print."

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

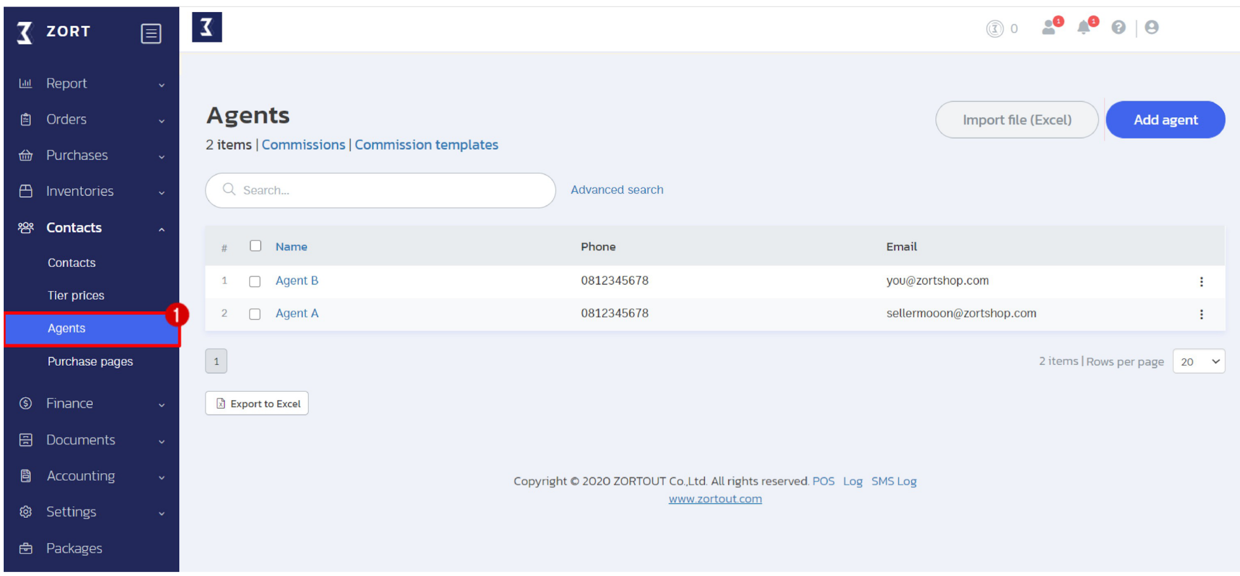


Sales Agents

Adding Sales Agents

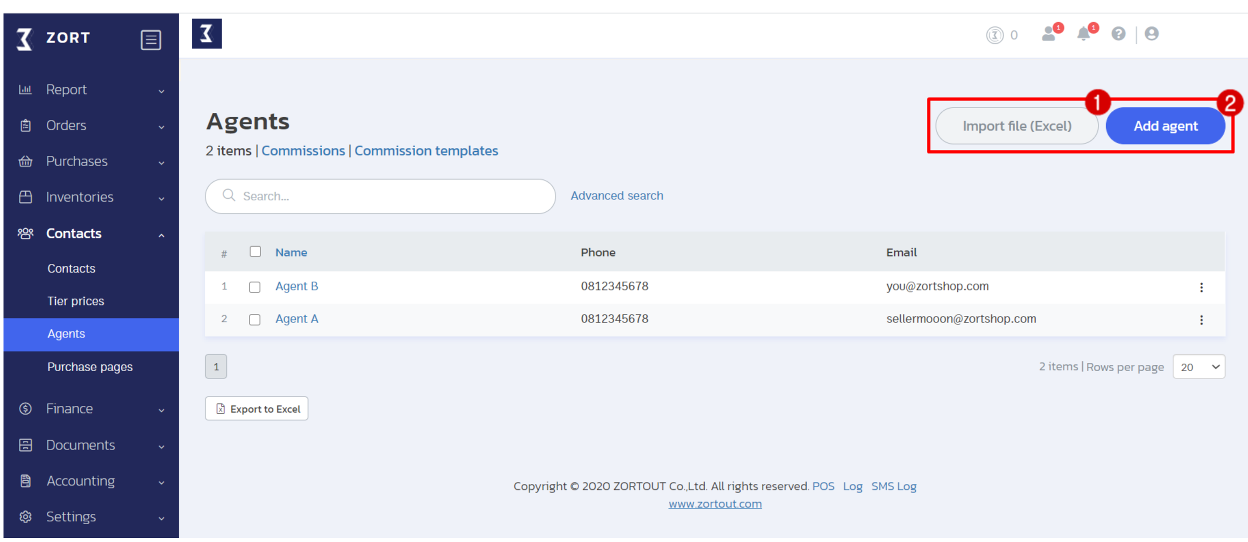
To get started with the dropshipping features, firstly, you have to add sales agents into the database. Follow the steps below.

1. Go to the “Contacts” menu and select “Agents.”



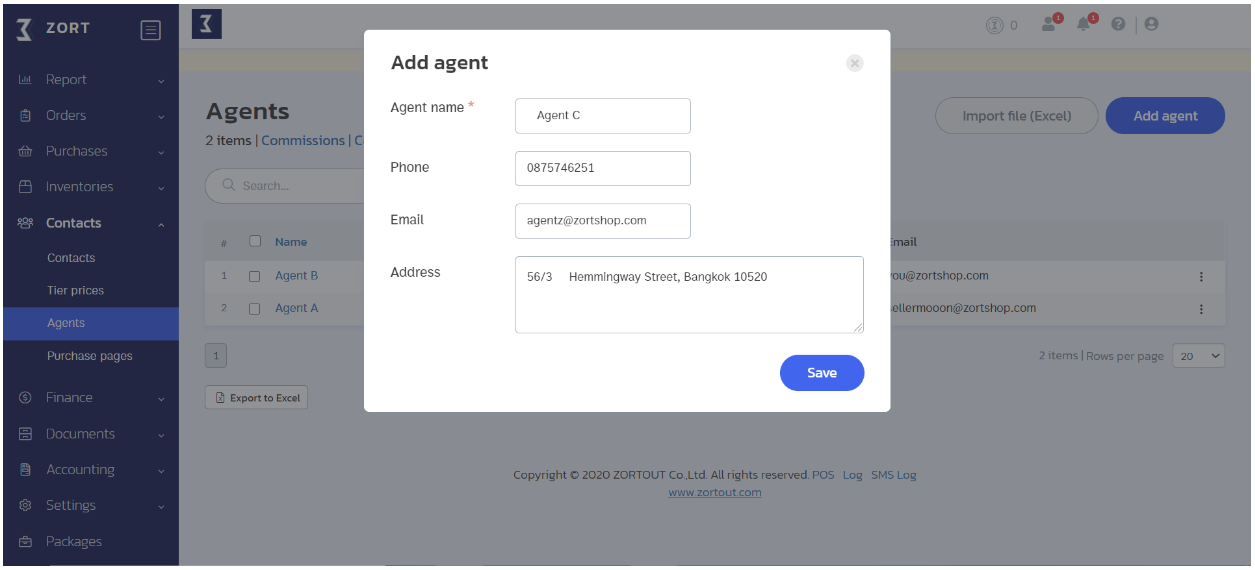
There are 2 possible ways to add sales agents:

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



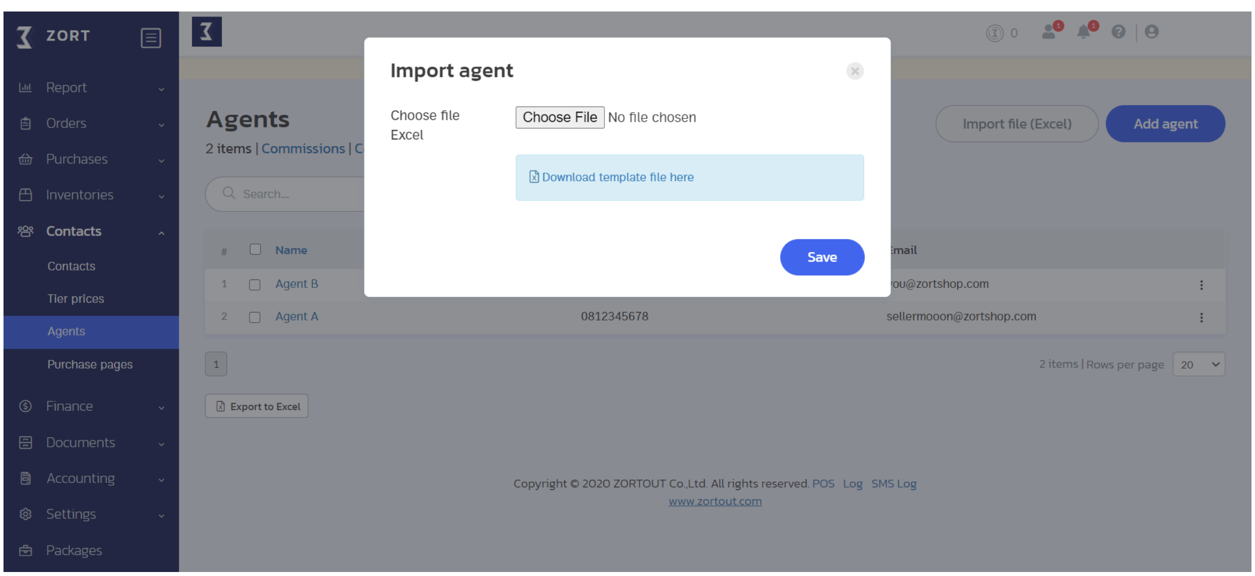
1. Adding one sales agent at a time (Add agent).

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



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

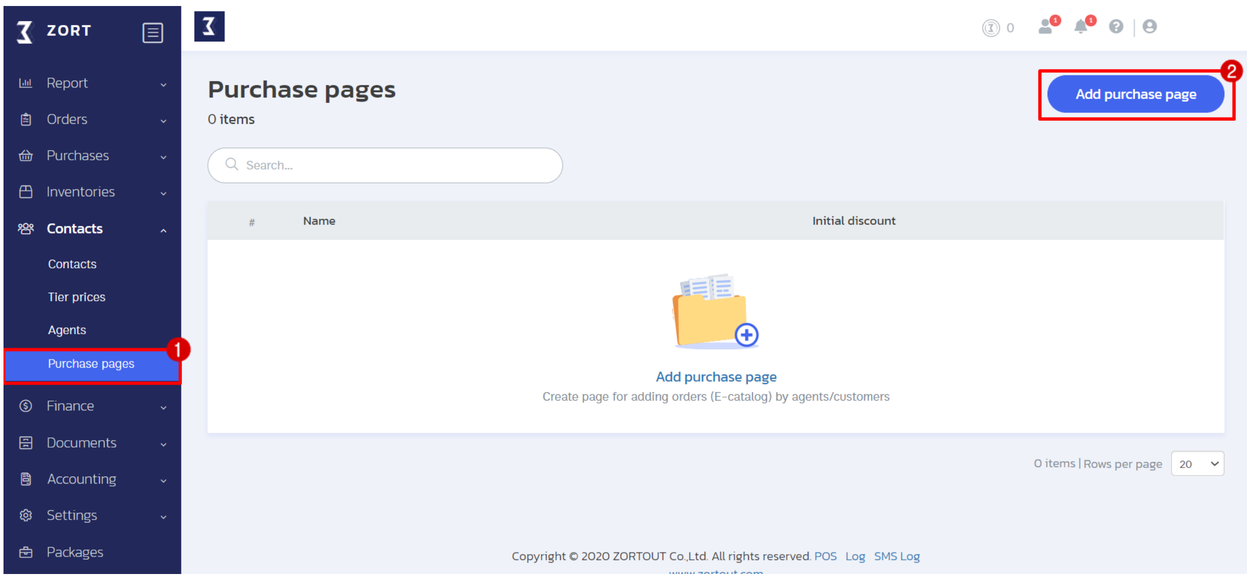
To import sales agents from an Excel file, you have to download a template from the ZORT system in order to import the sales agent information in a valid format.



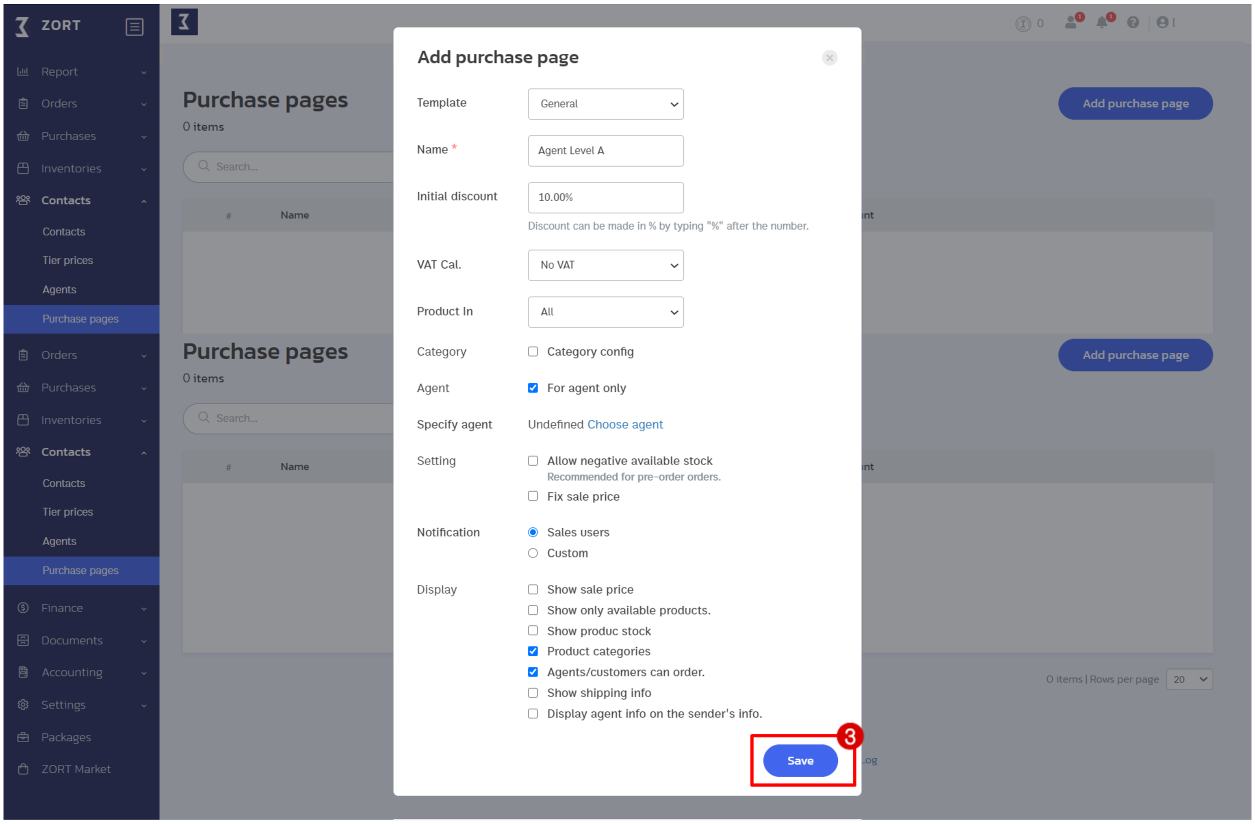
Creating Purchase Pages

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.

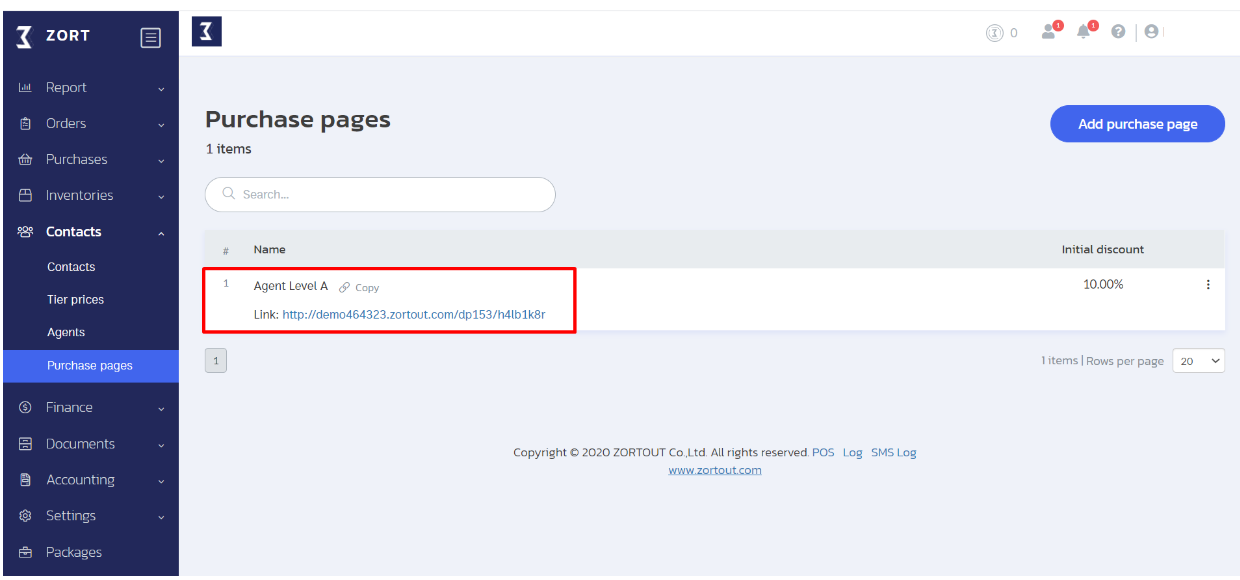
1. Go to the "Contacts" menu and select "Purchase Page."
2. Click on "Add purchase page."



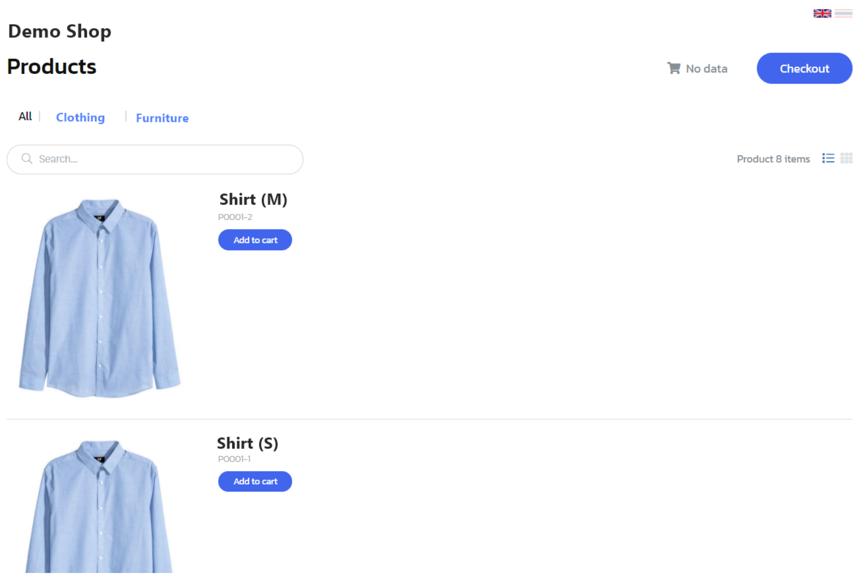
3. Set up the purchase page.
   - Set up a distinguishable name for the new sales page. It's recommended that you specify the discounts or tiers in the name, e.g., " Agent Level 1" or "Agent Level 2."
   - Define the initial discount for the sales agents to be using this purchase page.
   - Set up other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



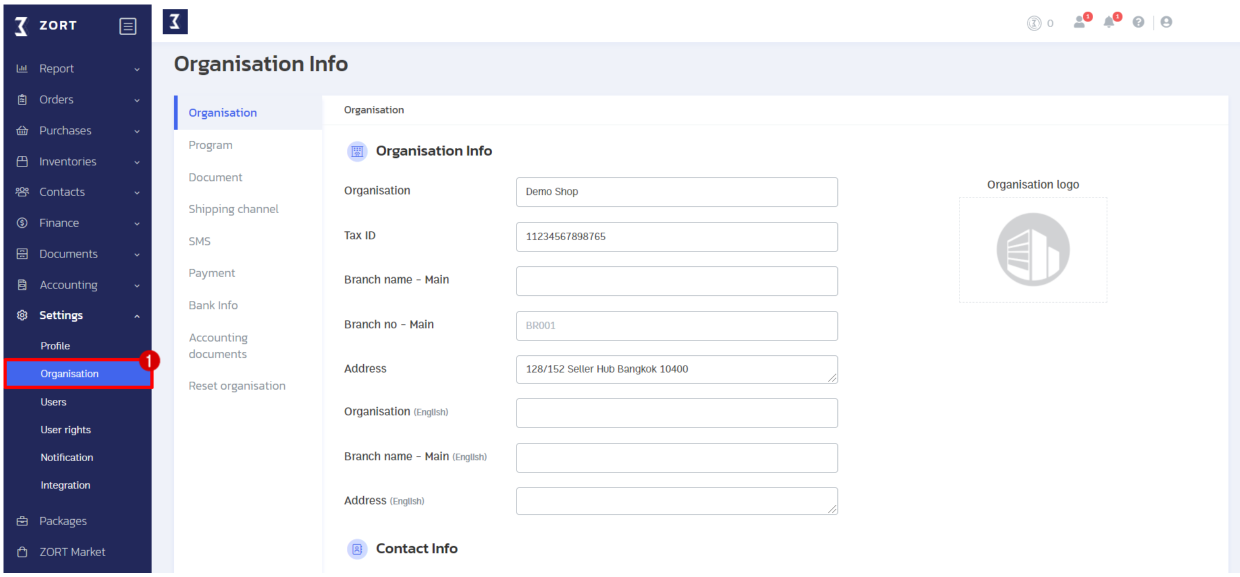
Sample purchase page



Settings

General Settings

1. Go to the “Setting” menu and select “Organisation.”



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.

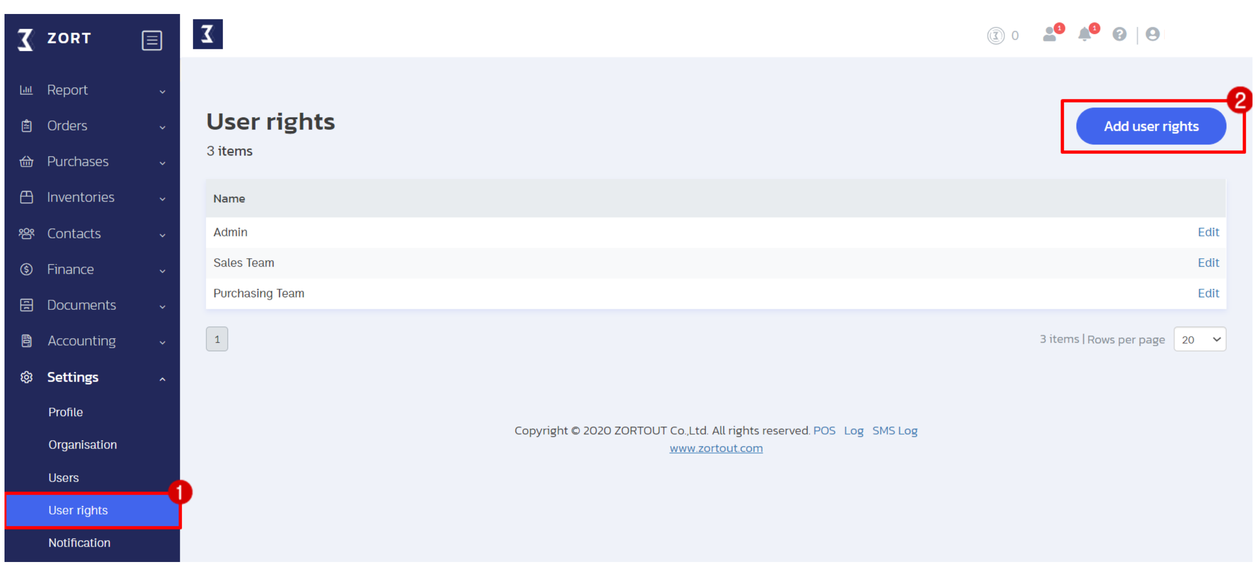
7. Bank Info: If you need a cash on delivery (COD) service, you can send your bank information from this page.
8. Reset Organisation: You can reset all the data on your account such as products, contacts and transactions (only the key user can use this function).

Setting User Rights

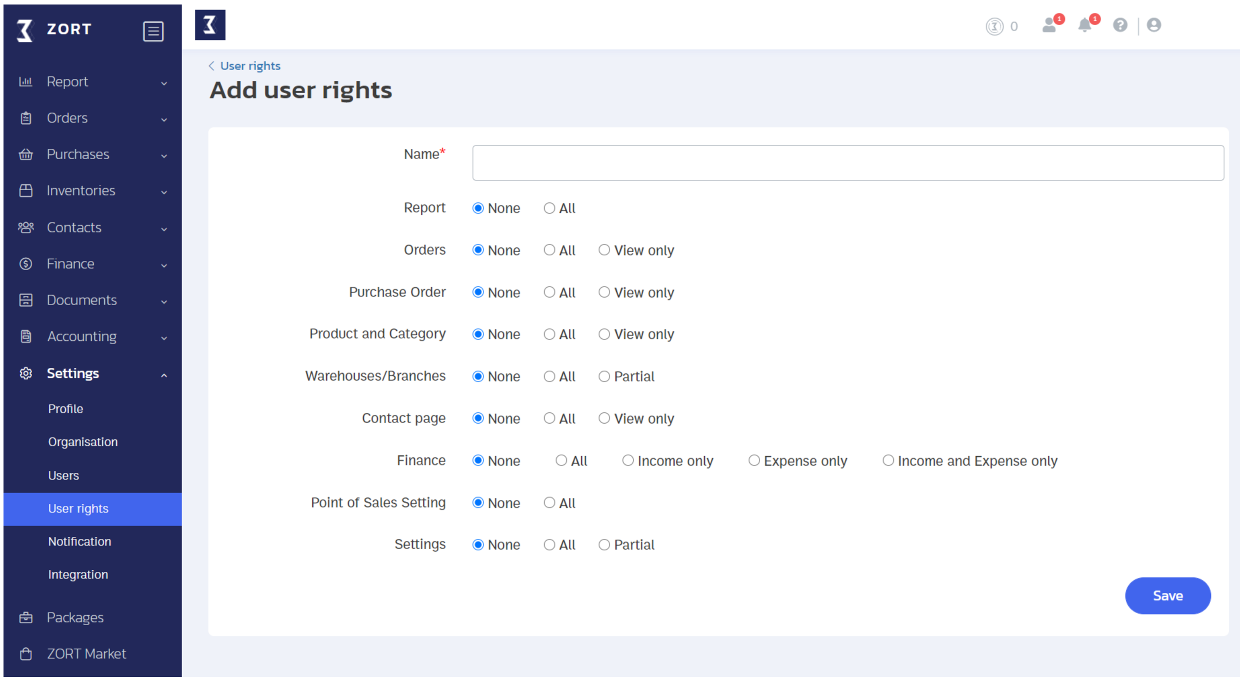
If you have many administrators operating your store, you can grant a specific access level to each one of them according to their role.

- 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."



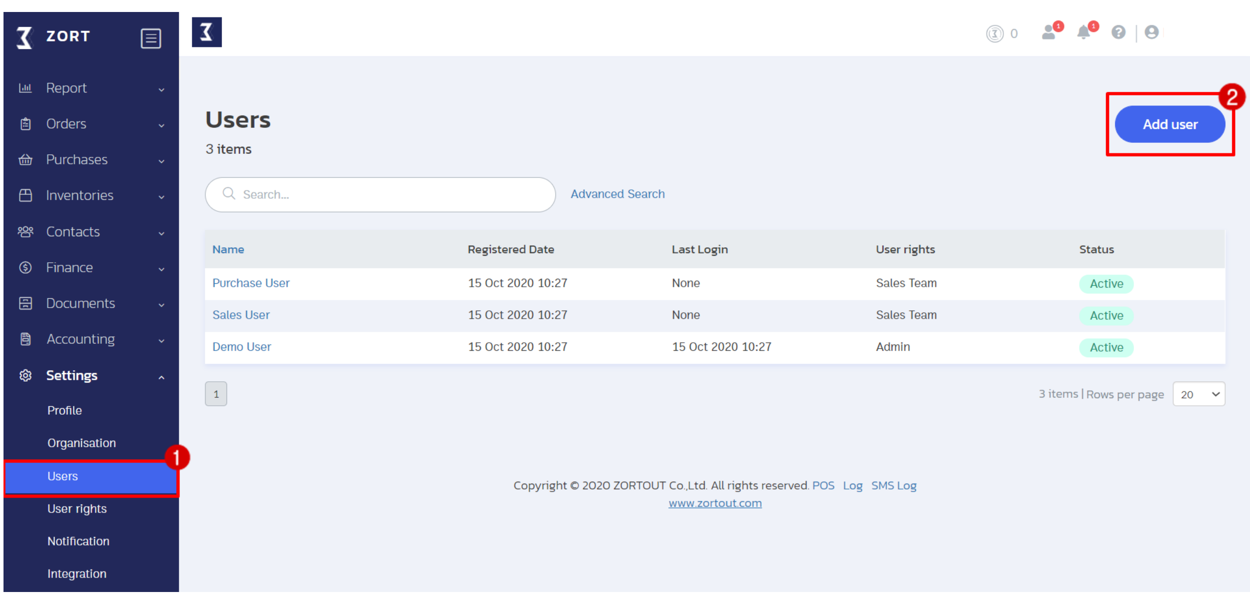
3. Identify the name, select access levels, and click on “Save.”



- Assigning User Roles

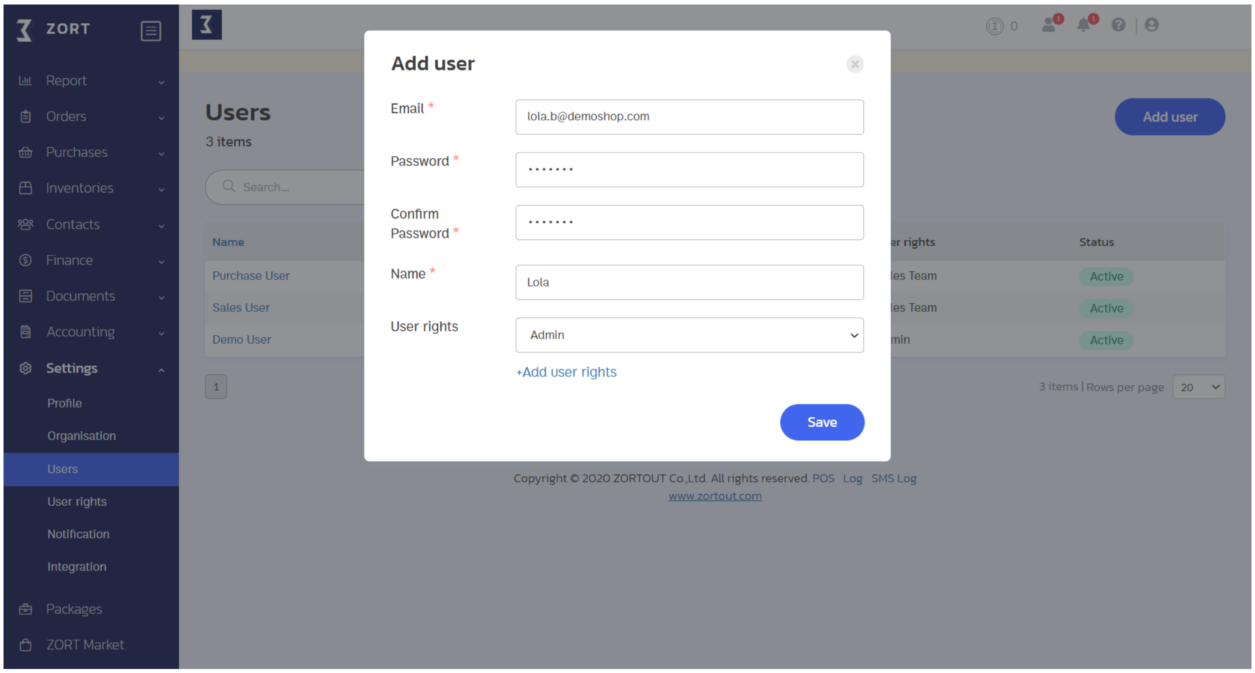
Once you finish with the user rights set up, you can add users based on their emails used for ZORT login by following the steps below.

1. Go to the “Settings” menu and select “Users.”
2. Click on “Add user.”



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

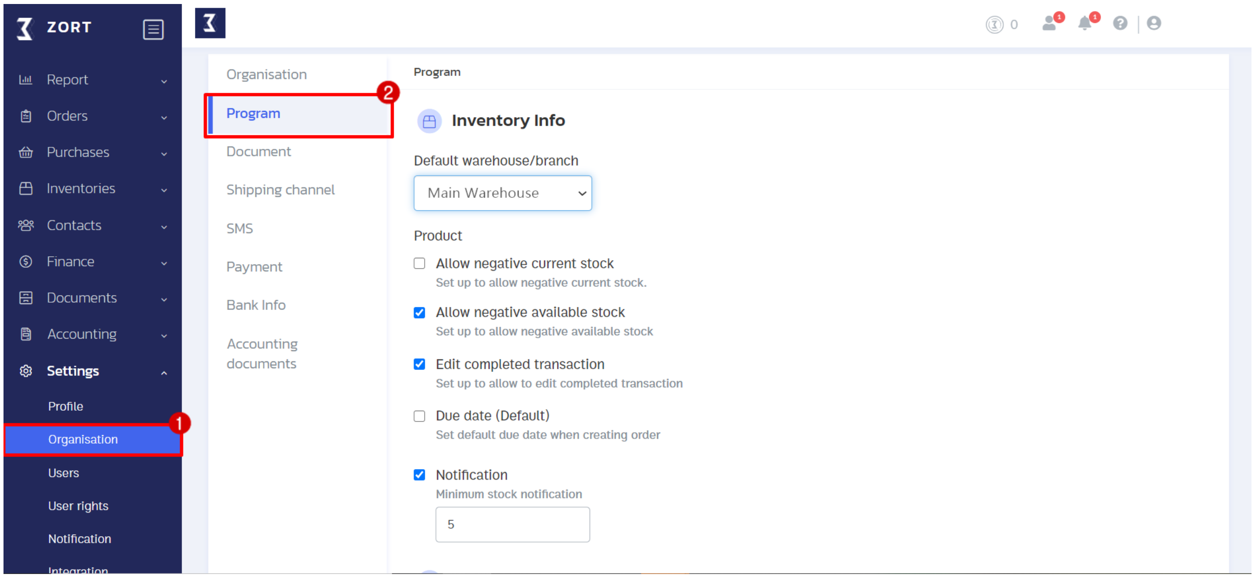
1. Profit Calculation

There are 2 methods for calculating your profit on ZORT:

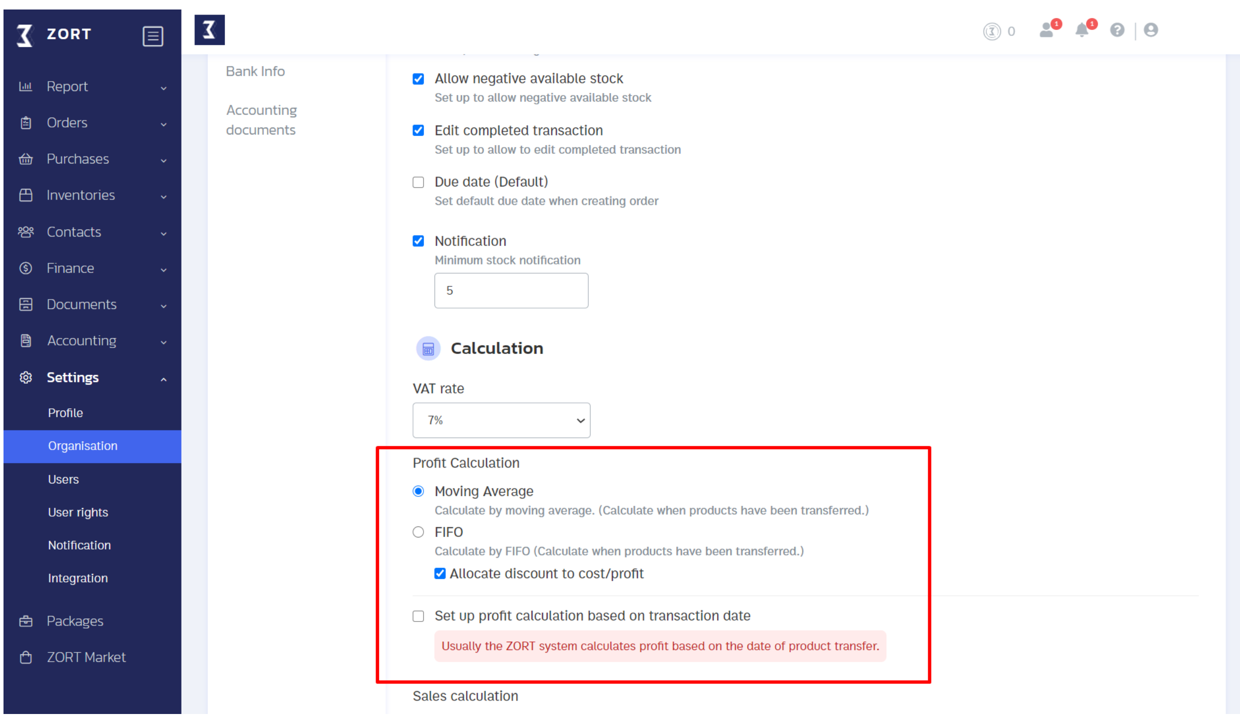
1) Moving Average is a calculation based on the average cost price of each batch.

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.”



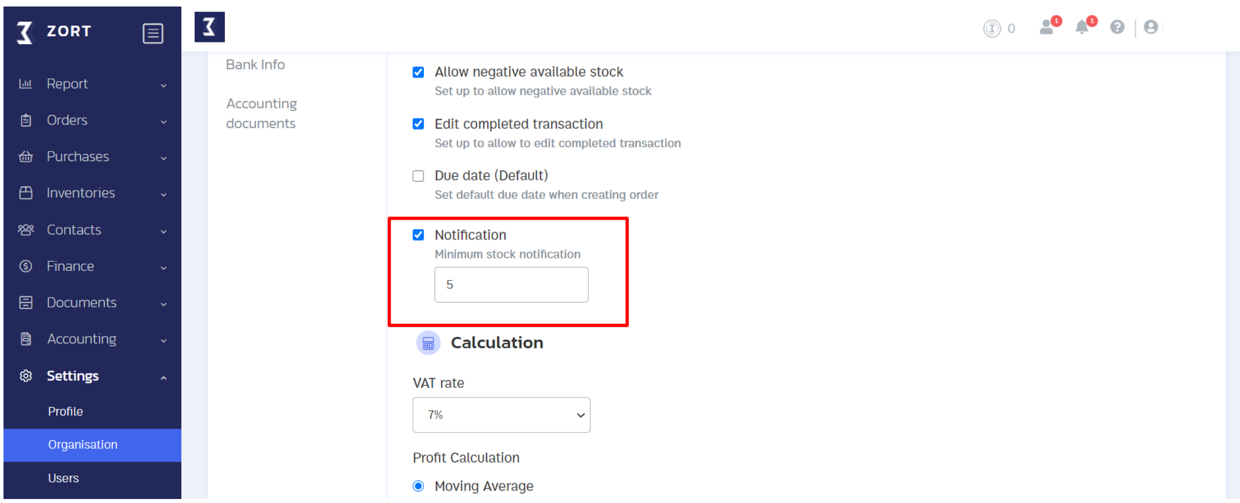
3. Click on the preferred profit calculation method.



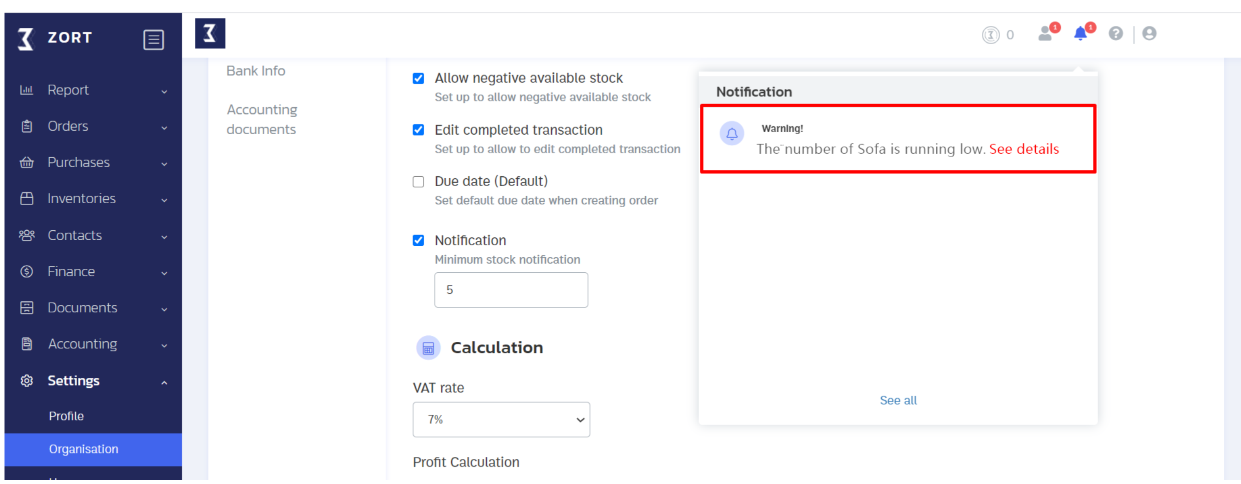
2. Low Stock Alert Setting

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.



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



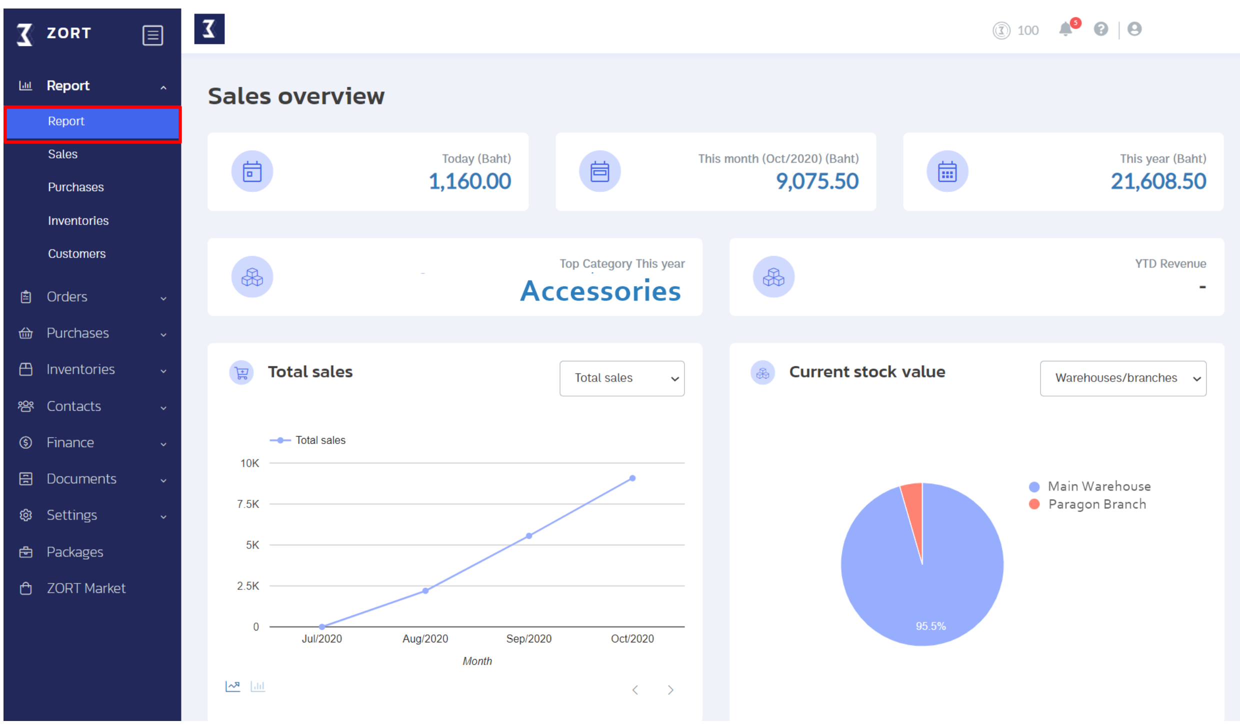
Reports

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.”



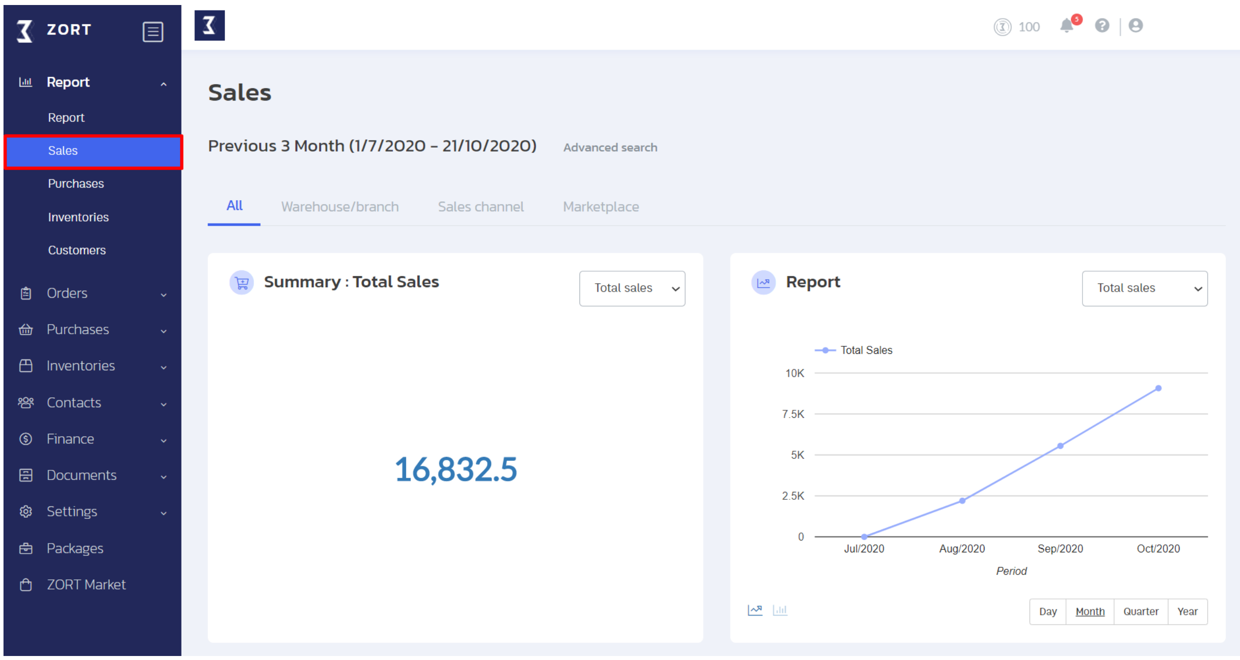
You see reports on your business based on these following topics:

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.

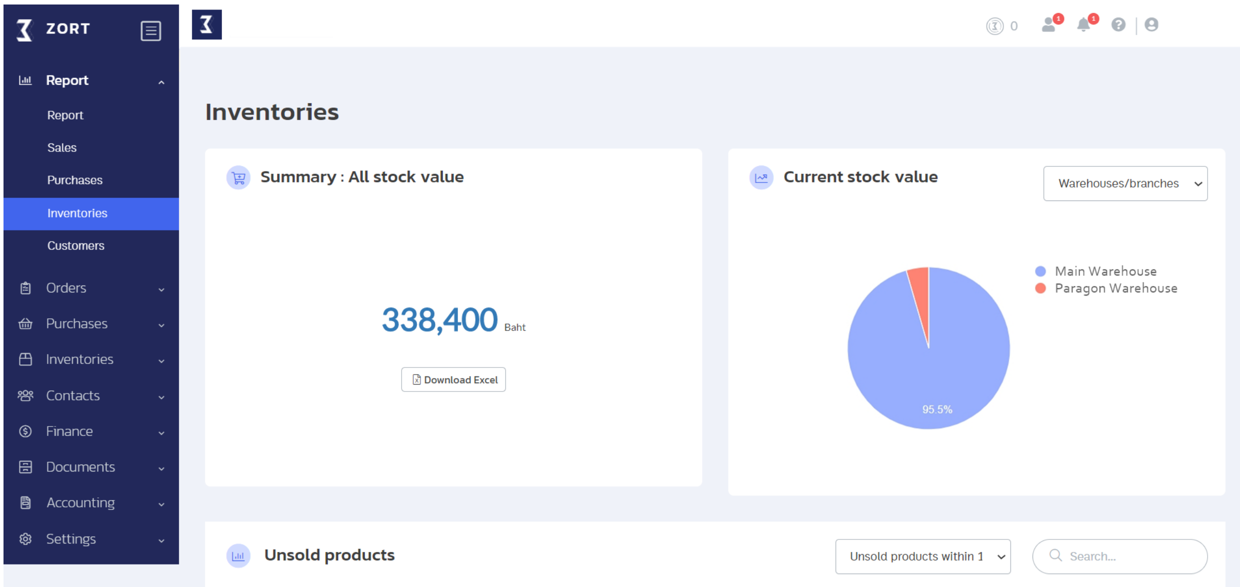
1. Go to the “Report” menu and click on “ Sales.”



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.

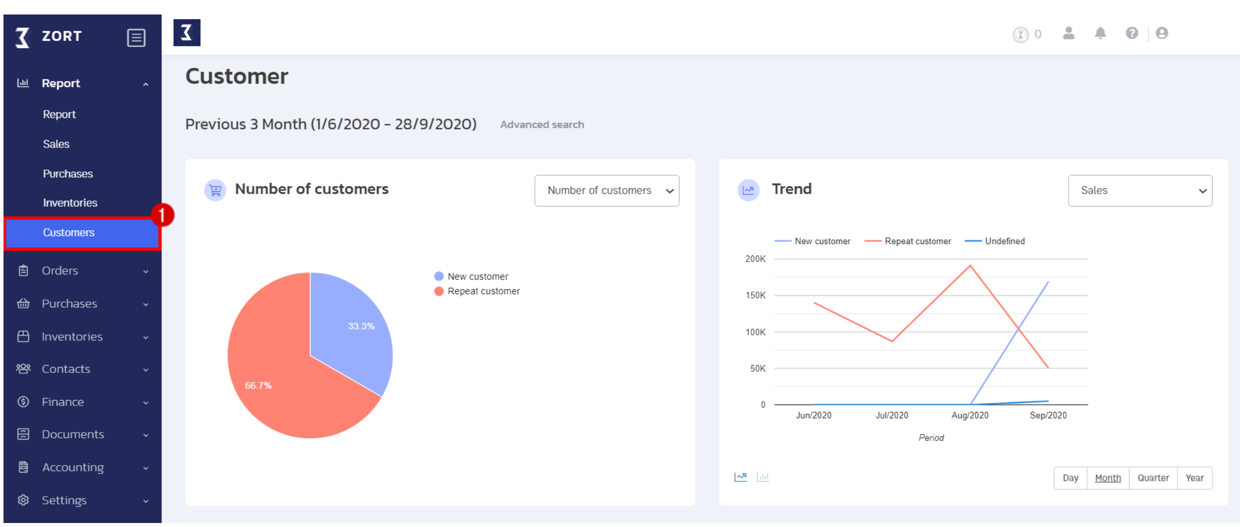
1. Go to the “Report” menu and select “Inventories.”



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.

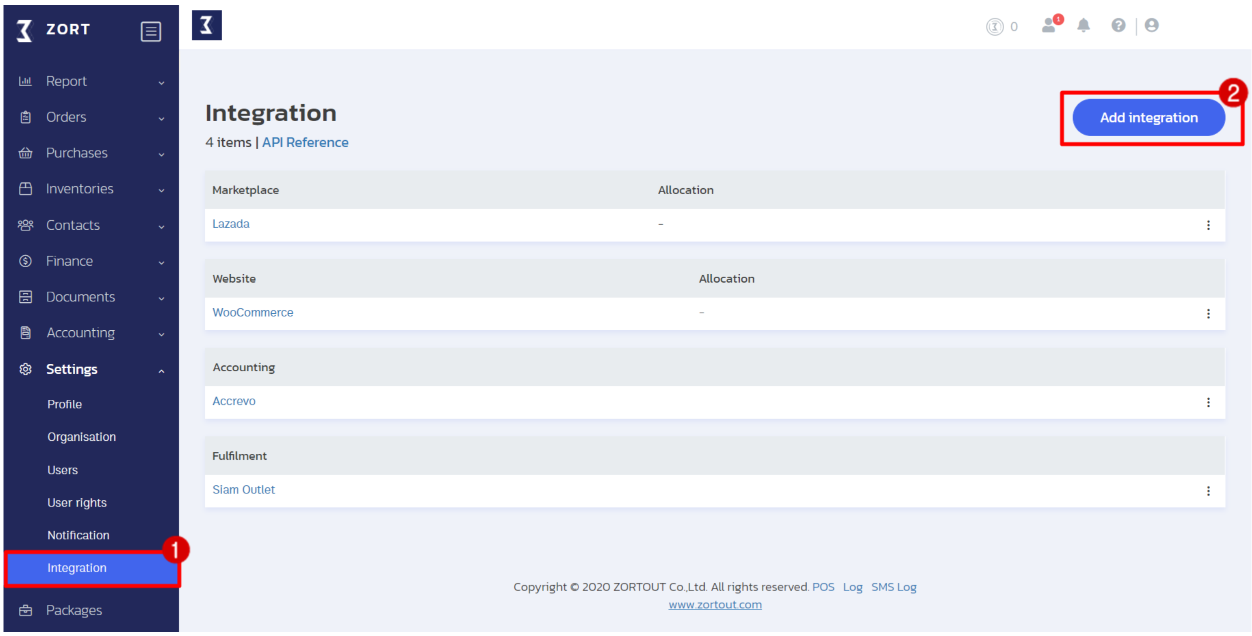
1. Go to the “Report” menu and select “Customers.”



Integrations

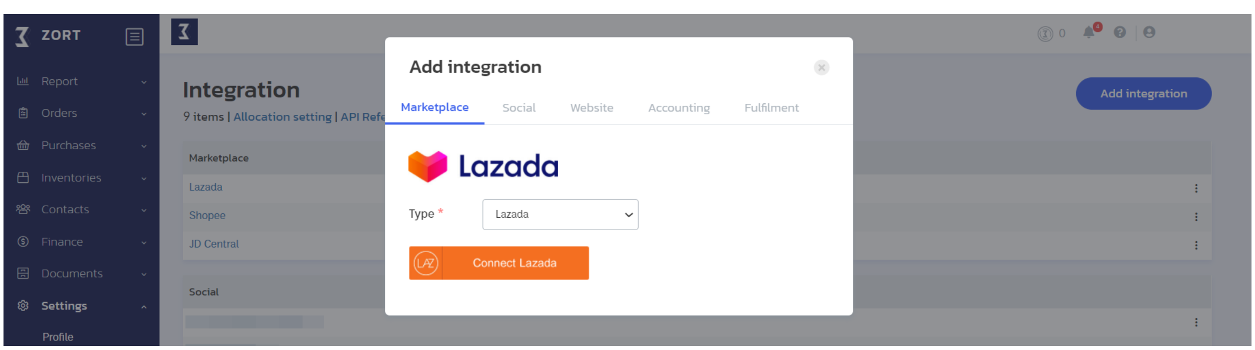
ZORT can integrate with sales channels and other management platforms by following the steps below.

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



Contact Us

Tel: 02-026-6423

Line: @zort

Facebook: zortcompany

www.zortout.com