PUREJOIN ENTERPRISE MANUAL

V.104.244.122.227

Preface

PUREJOIN ENTERPRISE User Guide

Version: V.104.244.122.227

Copyright © 2023 PUREJOIN, Inc. All rights reserved

This document is provided for informational purposes only. All features and specifications are subject to change without notice. If there are any problems in the documentation, please report.

Security Notice: No part of this document may be copied, distributed, stored in a retrieval system, translated into any human or computer language, transmitted, in any form or by any means, without the prior written consent of PUREJOIN, Inc.

Overview

The Manual contains all essential information for the user to make full use of the Enterprise program. This manual includes a description of the system functions, and step-by-step procedures for system access and use.

Technical Support

If there is a problem while installing, registering or operating this product, please refer to the documentation. If it is not possible to resolve the issue, please contact customer support.

Technical Support Contact Information

Phone: (678) 206-0500

Email: sales@purejoin.com

URL: www.merchant.purejoin.com

The following figure shows the PUREJOIN Enterprise Dashboard.

I. ITEMS:

1. Create New Item

- Tasks > Inventory > New Item.
- Input Item code, item description, item class, full price, etc.
- To Add Item Picture: Select tab 'Images'
  - Double click to background to add a picture.
- To view sales history: Select tab 'Sales History'.
- To view purchase history: Select tab 'Purchase History'.
- To view sales and purchase history by month: Select tab 'Years Summary'.
- To add Alias Barcode: Select tab 'BarCode Alias'.
  - Right click to Alias table > Add Alias > Enter Alias barcode > OK.
- 'Save'.
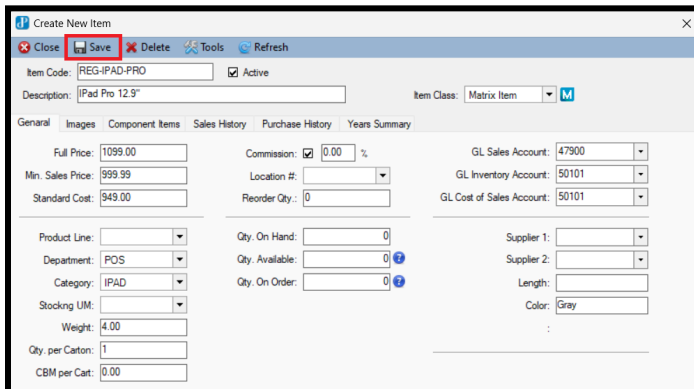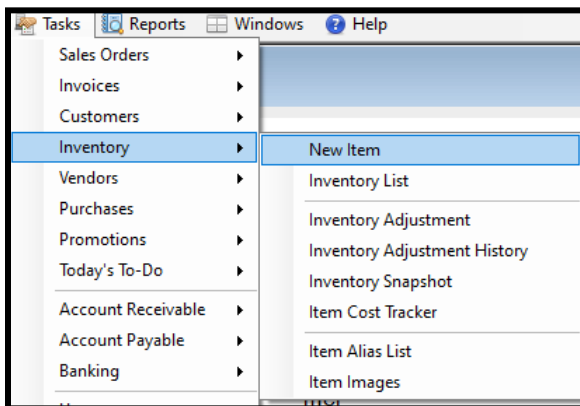
2. Add Sales Promotions

- Task > Promotion > Sales Promotions.
- Select 'New' > Enter Promotion's title, sales date and eligible items.
- Enter Markdown Price.
- 'Save'.
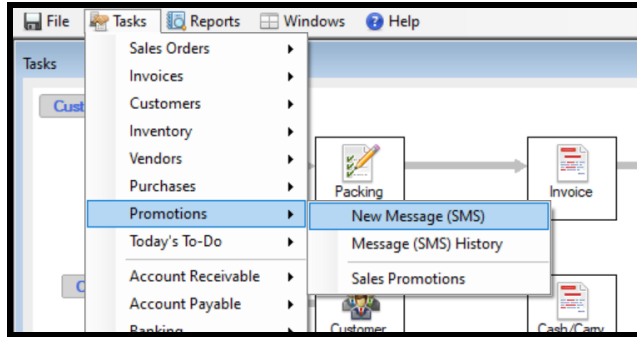
3. Send out Promotion text message
- Tasks > Promotions > New Message (SMS).

4. Export Item List
- Tasks > Inventory > Inventory List > Tools > Export.
- Enter File name > Save as type: Excel (*.xls).

5. View Inventory Snapshot - The report that lists all the products in your inventory as of a particular time.
- Tasks > Inventory > Inventory Snapshot.
- Select item and date range.
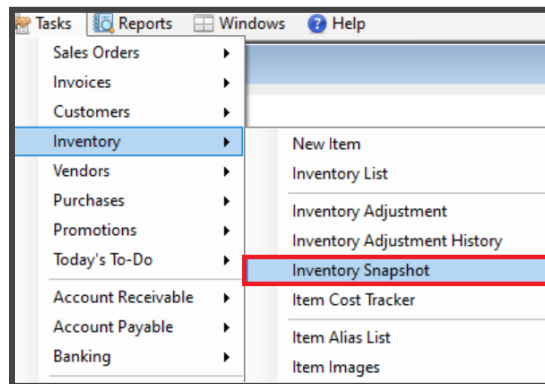
6. Set Item Tax %
- Tasks > Inventory > Inventory List.
- Select item > Check 'Is Taxable' box > Enter tax %.

II.   CUSTOMER:

1.   Add a Customer
- Tasks > Customers > New Customer.
- Enter customer information > Select Sales Rep > Customer Type > Save.
- To add Person in charge information: Select tab 'Contacts'.
- To add Customer payment method: Select tab 'Payment & Credit'.
- To view Open Sales: Select tab 'Open Sales Order'.
- To view Statement: Select tab 'Statement'.
- To view Total sales by month, year: Select tab 'Yearly Summary'.
- To add a Customer document: Select tab 'Attachments'.
        Right click to table > Upload > Add File > Select Files > Upload Files.
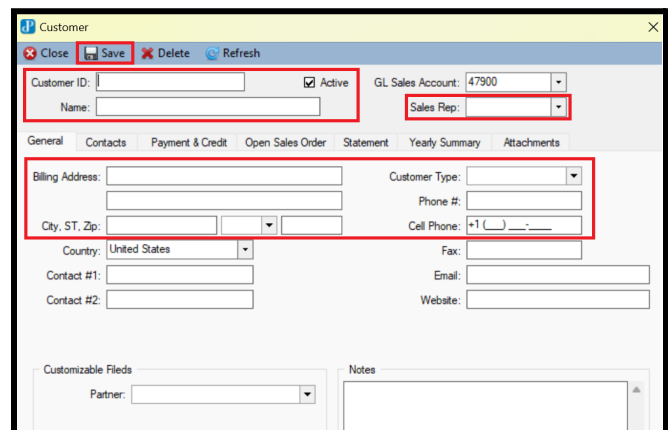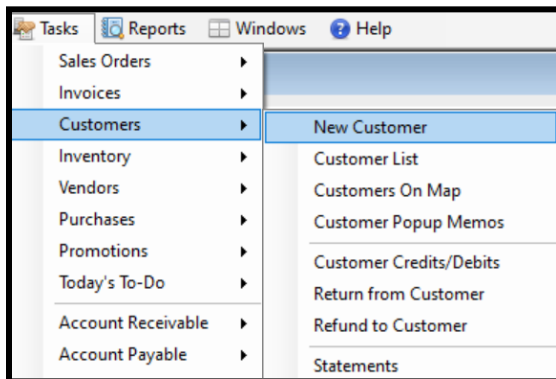
2.   To Edit Customer Information
- Tasks > Customers > Customer List > Double click on customer to edit information.
- To add a Customer document: Select tab 'Attachments'.
        Right click to table > Upload > Add File > Select Files > Upload Files.

3.   View 1-year record
- Tasks > Customers > Customer List > Double click to select a Customer .
- Click on Stats Icon next to Customer ID.
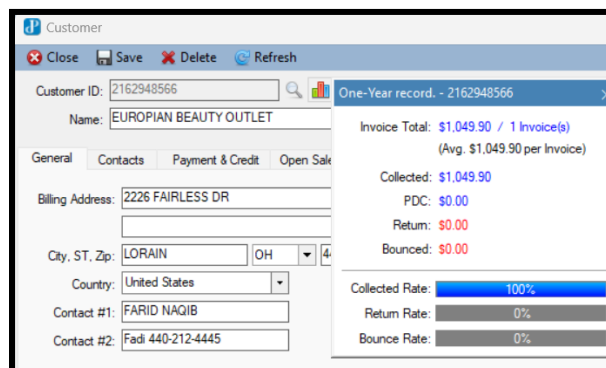
4. **Add Multi-locations under one customer**
   - Tasks > Customers > Customer List
   - Customer Type > Enter 'Multi'.
   - Go to tab 'Contacts' > Hit green button with plus sign next to Select a contact box to add new contact
   - Enter new location information
   - 'Save'.
   - To view other locations: Click the down arrow next to Select a contact box > Select store.
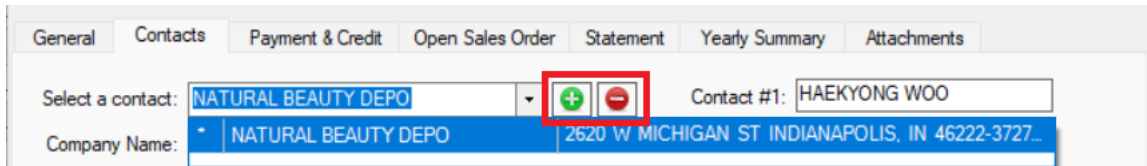
5. **View Customer-on-Map -** View Customer's location, balance, last invoice date and sales rep name on Map.
   - Tasks > Customers > Customers on map.
   - Select on red-dot to view.

The following figure shows the demo Customer-on-Map.
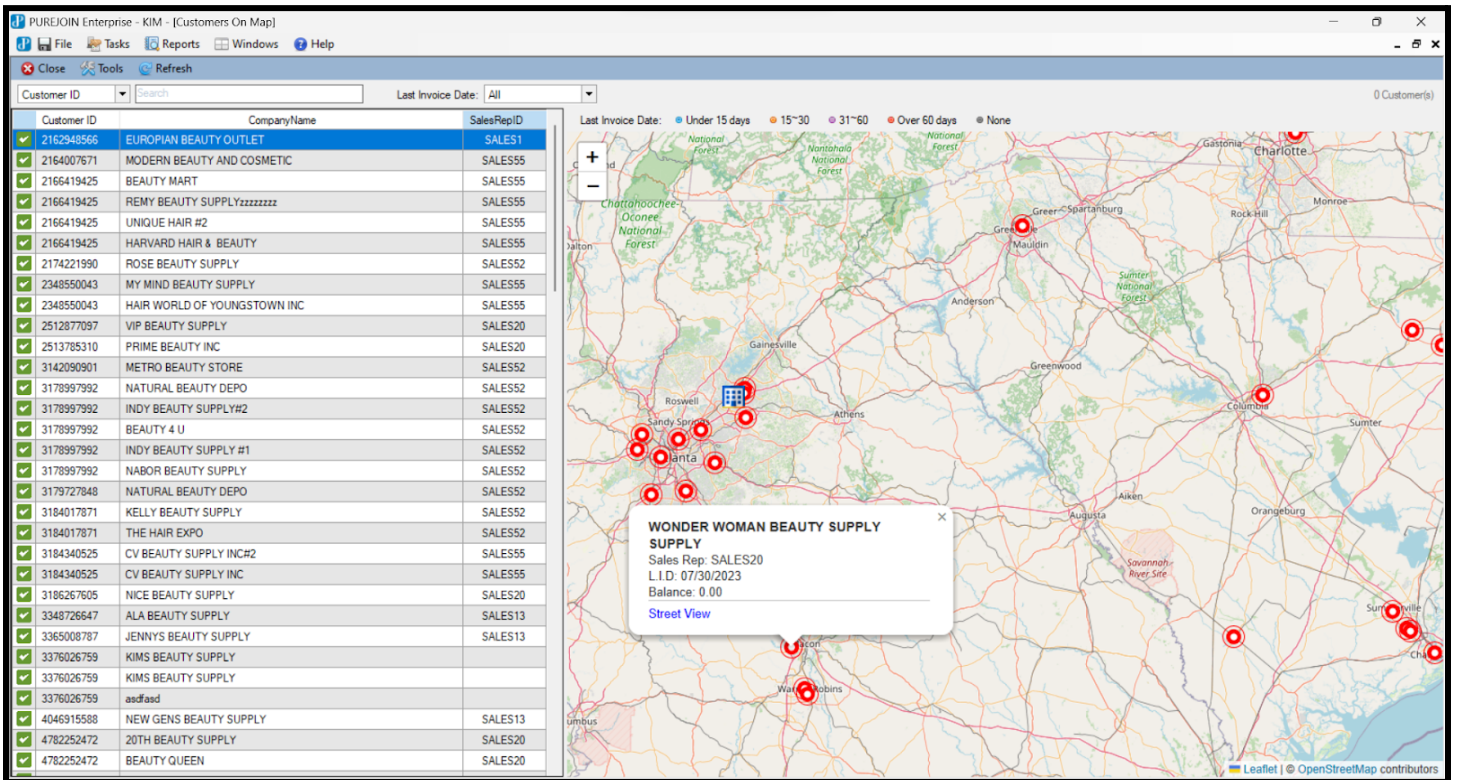
III. VENDOR:

1. Add a Vendor
- Tasks > Vendors > New Vendor.
- 'General' tab > Enter Vendor Information > Select Purchase Reps.
- To add payment and shipping method: Select tab 'Purchase Info'.
- To view Open PO: Select tab 'Open Purchase Order'.
- To view History: Select tab Account History.
- To view Total payments by month, year: Select tab 'Payment Summary'.
- To view detailed purchase history: Select tab 'Vendor Journal'.
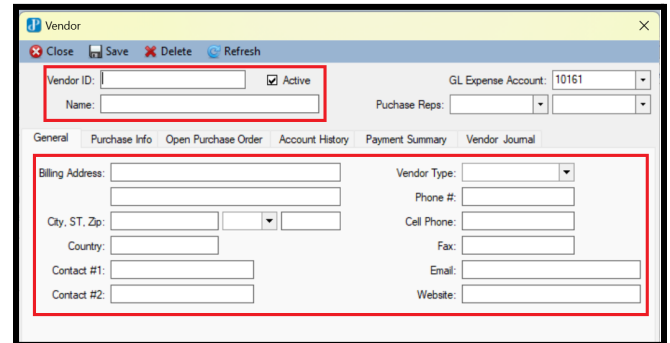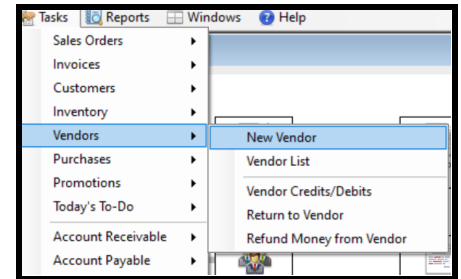
2. Make an Purchase Order
- Tasks > Purchases > New Purchase Order > Select Vendor.
- Look up item > Enter quantity > 'Apply'.
- 'Save'.
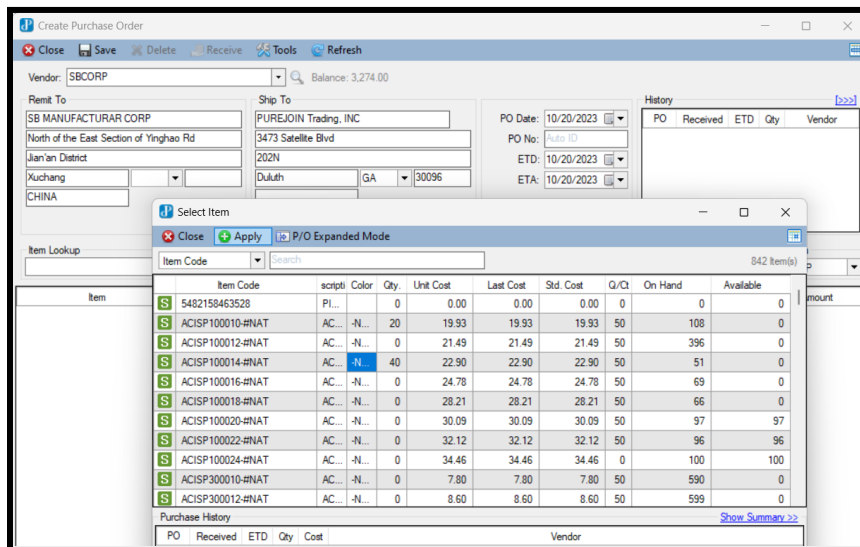
3. Mark as Received Purchase Order
- Tasks > Purchases > Receiving Purchased Items.
- Select Purchase Order number.
- Enter the amount of items received.
- 'Commit' > Type 'YES' in the pop-ups box.

IV.   USERS:

1. **Create User**
- Tasks > Users > New User.
- Enter User ID, Password and User information.
- Properties > Enter Commission % , Wage per Hour, Tax Code and D.O.B.
- Set User's Authority: Select 'Sales Preset'.
        Administrator: full access authority to all Task Areas.
        Other Presets: specific access authority to specified Task Areas.
        If the user is a sales rep, check the 'Sales Rep' box under User Information.
- 'Save'.
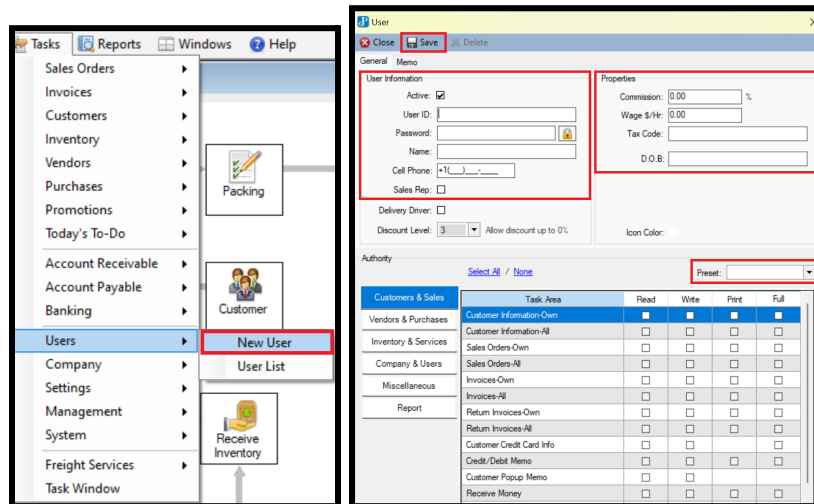
2. **To view User Auditing -** Check real-time user's activity for the past 6 months.
- Tasks > Management > User Audits.

-

V.   SETTINGS:

1. **Create Inventory Department & Category**
-   Tasks > Settings > Categories.
-   To add Departments:

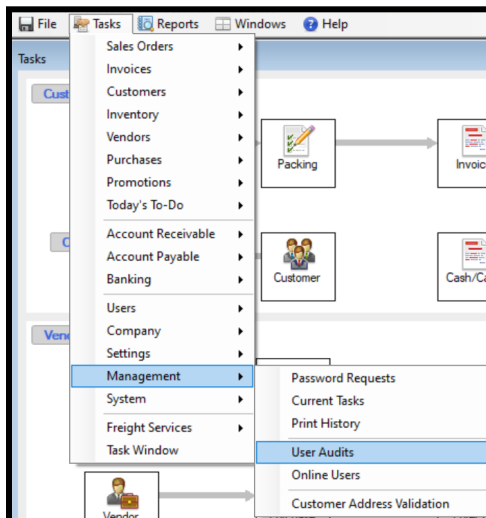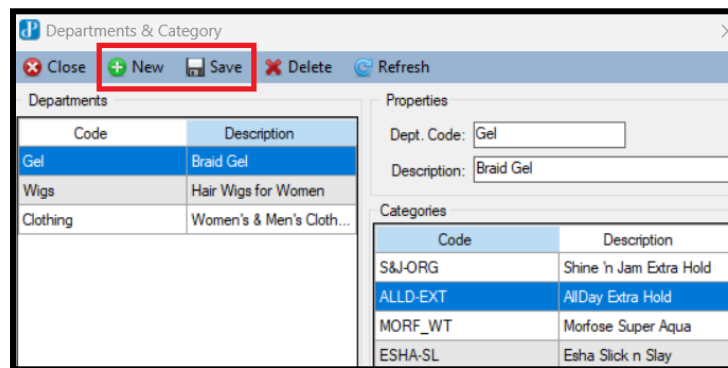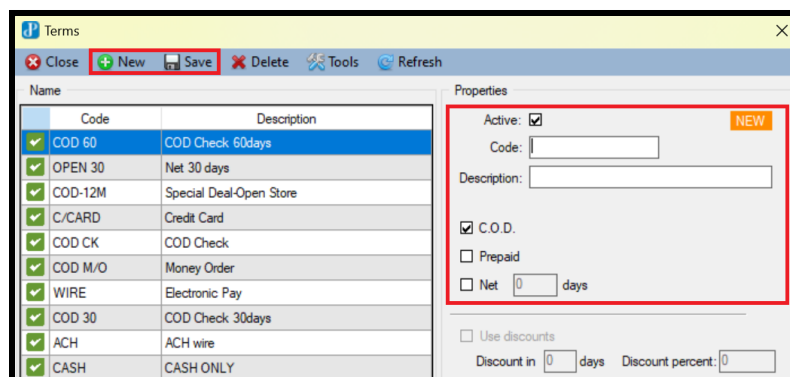   Select 'New' > Enter Dept. Code > Enter Description > 'Save' (The new department code will show up on the left table named Departments)
-   To add Categories:

    Double click 'Department code' > Double click to the blank on the right table named Categories > Enter Categories code and description > 'Save'.
-   To delete Department/ Category:

   Select Department/ Category > Right click > 'Delete'.

2. **Create Terms for Payment**
-   Tasks > Settings > Terms.
-   To add Terms:

    Select 'New' > Enter Code > Enter Description > 'Save' (The new department code will show up on the left table).
-   To edit Terms:

    Select Terms > Enter new Code > Enter new Description > 'Save'.
-   To delete Terms:

    Select Terms > Right click > 'Delete'.

3. Create Shipping Options
- Tasks > Settings > Ship Via.
- To add Ship Via:

   Select 'New' > Enter Code > Enter Description > Enter Default Charge > Select Service option > 'Save' (The new department code will show up on the left table).
- To edit Ship Via:

   Select Ship Via > Enter new Code > Enter new Description > 'Save'.
- To delete Ship Via:

   Select Ship Via > Right click > 'Delete'.
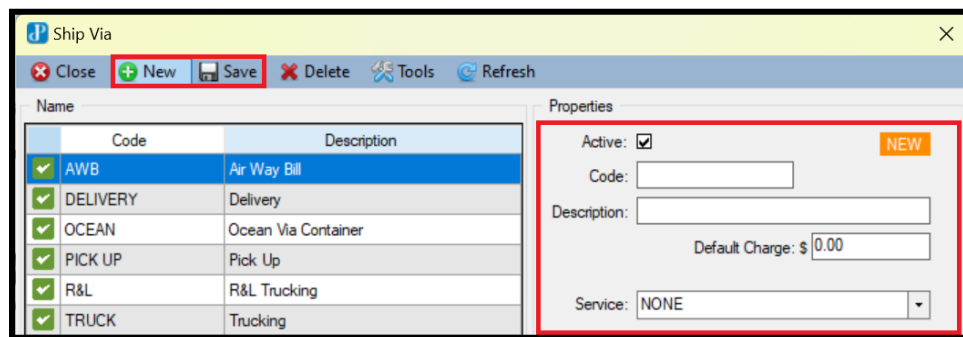
4. Create Item Dimensions
- Tasks > Settings > Dimensions.
- To add Dimensions:

   Select 'New' > Enter Code > Enter Description > Enter Attribute's Description and Quantity > 'Save' (The new department code will show up on the left table).
- To edit Dimensions:

   Select Dimensions > Enter new Code > Enter new Description > Enter new Attribute's Description and Quantity > 'Save'.
- To delete Dimensions:

   Select Dimensions > Right click > 'Delete'.
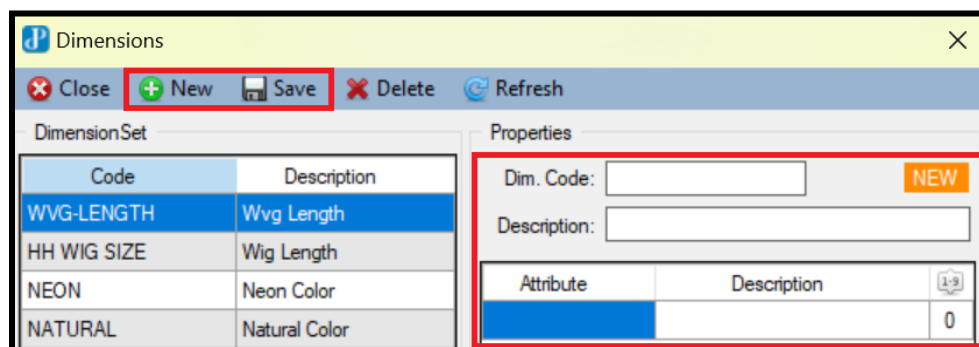
5. Create Packing Boxes
- Tasks > Settings > Packing Boxes.
- To add Packing Boxes:

    Select 'New' > Enter measurements > 'Save' (The new department code will show up on the left table).
- To edit Packing Boxes:

    Select Packing Boxes > Enter new measurements > 'Save'.
- To delete Packing Boxes:

   Select Packing Boxes > Right click > 'Delete'.
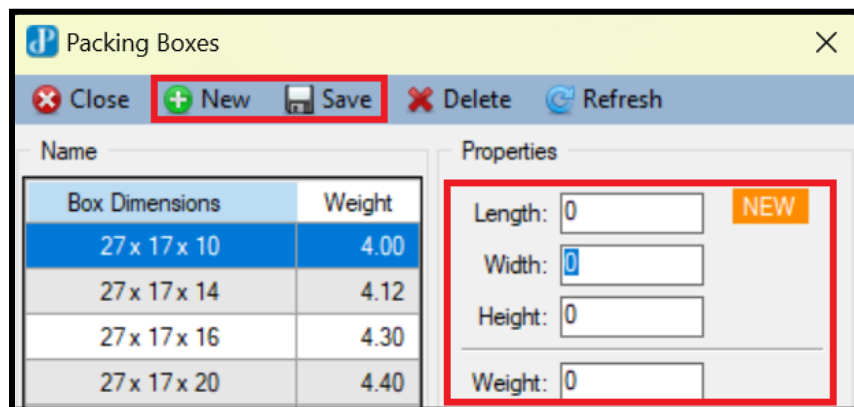
6. Create Reason Codes
- Tasks > Settings > Reason Codes.
- To add Reason Codes:

    Select 'New' > Enter reason description > 'OK' (The new department code will show up on the table).
- To choose Reason Codes type:

    Select Reason Codes > Select Type > 'Save'.
- To edit Reason Codes:

    Select Reason Codes > Right click > 'Rename'.
- To delete Reason Codes:

    Select Reason Codes > Right click > 'Delete'.
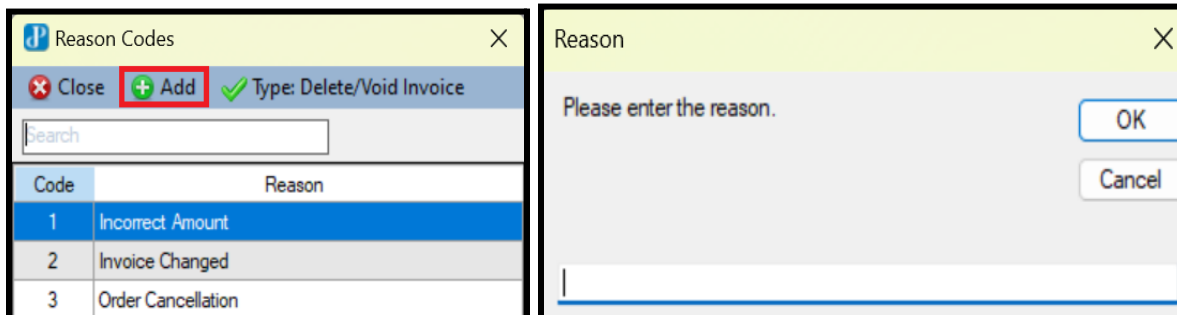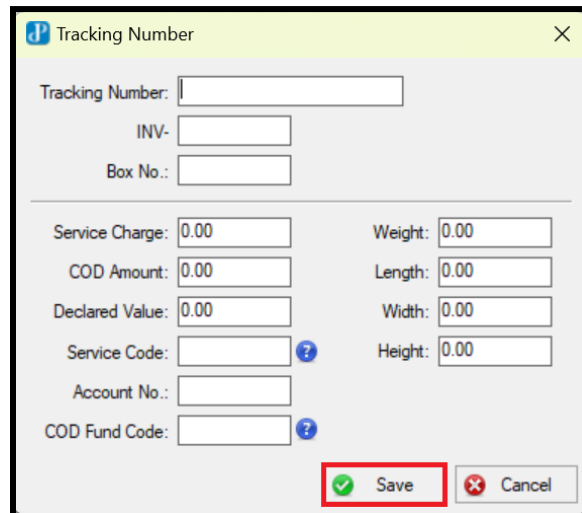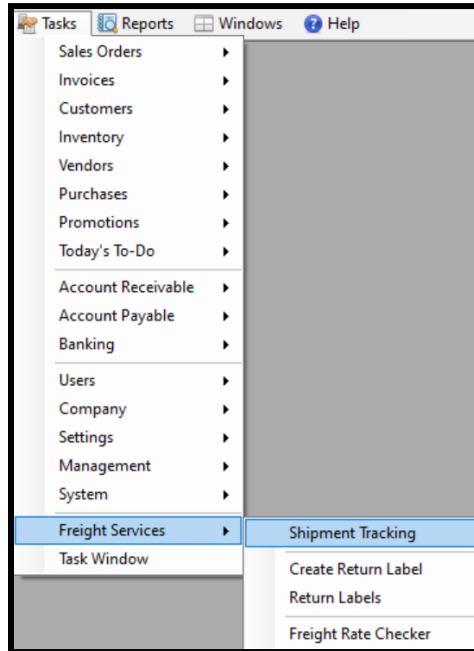
7. **Edit Barcode Scanner Configuration**
   - Tasks > Settings > Barcode Scanner.
   - Check box Barcode Scanner Type > 'Save'.
   - To edit COM/Serial Port:
        Check box COM/Serial Port > Select COM Port > Enter configuration data > 'Save'.
   - To test Barcode Scanner:
        Test > Scan barcode.
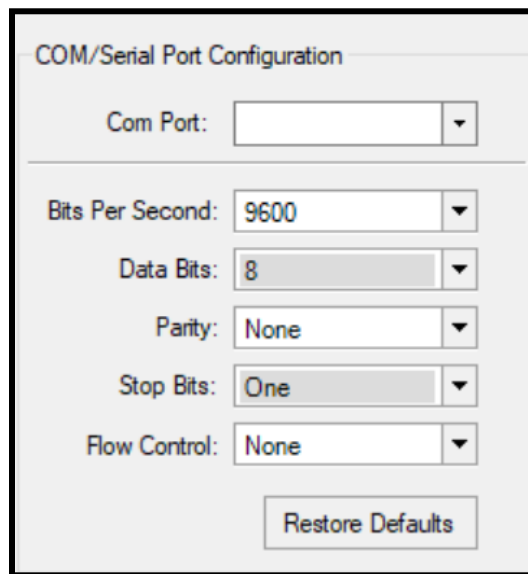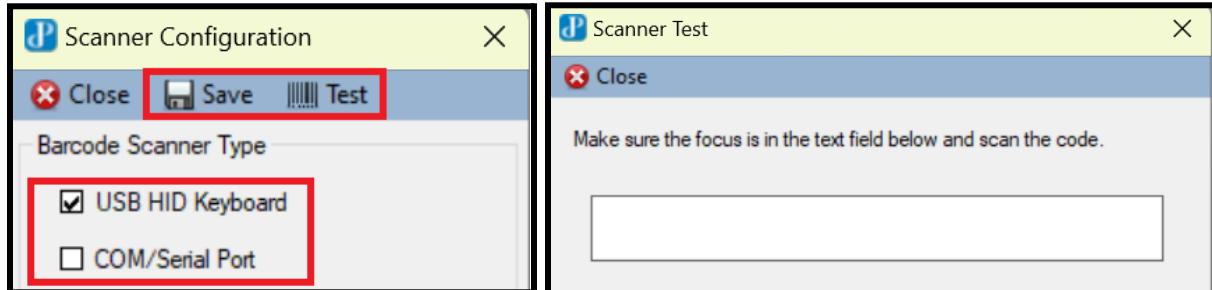
VI.   FREIGHT SERVICES:

1. **Shipment Tracking**
   - Tasks > Freight Services > Shipment Tracking.

2. **Create Return Label**
   - Tasks > Freight Services > Create Return Label.
   - Select Customer > Enter Label Description > Select Reason Code > 'Save'.
   - To view Return Label:
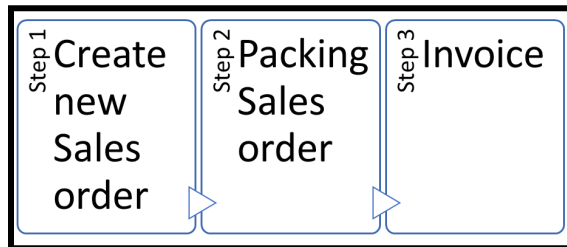   Tasks > Freight Services > Return Label.

3. Freight Rate Checker
- Tasks > Freight Services > Freight Rate Checker.
- Select Customer > Select UPS Service > Select Bill Transportation To options.
- Select 'Add' > Enter Net-Weight > Select Dimensions > 'Recalculate'.

VII. SALES ORDER:

1. **Create a Cash/ Carry** (for in-store order)
- Tasks > Invoices > New Invoice - Cash & Carry.
- Select Customer > Look up item > Enter quantity > 'Apply' > Create Invoice.
- Select the customer's payment method.

**To make a Sales Order:

```
Step 1  Create        Step 2  Packing       Step 3  Invoice
        new                   Sales
        Sales                 order
        order
```

2. **Create a Sales Order**
- Tasks > Sales Orders > New Sales Order.
- Select customer > Look up item > Enter quantity > 'Apply'.
- 'Save'.

3. **Packing Sales Order**
- Tasks > Sales Orders > Packing.
- Select Open Sales Order.
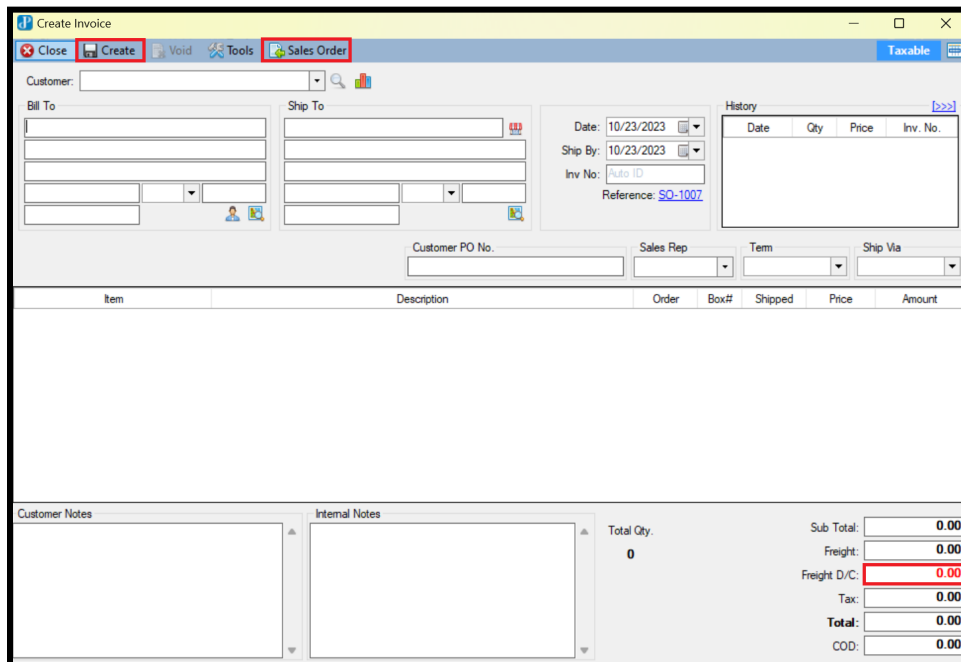- Enter quantity to box: 2 modes

Scanner Enabled mode: Use scanner to scan items before packing.
Scanner Disabled mode: Manually enter quantity.
- Select 'Packing Completed' > 'Yes'.
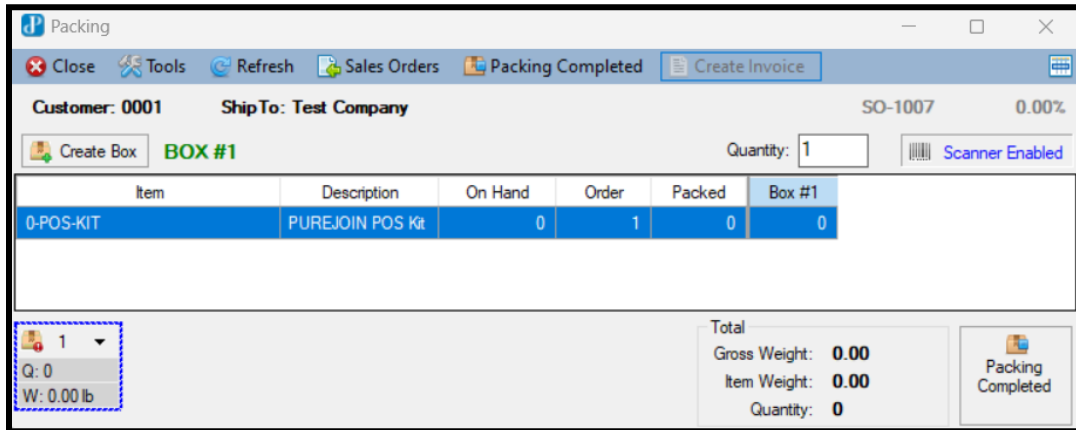
4. Create an Invoice
- Tasks > Invoices > New Invoice.
- Select Open Sales Order.
- Enter 'Freight D/C' to print out labels integrated with UPS.
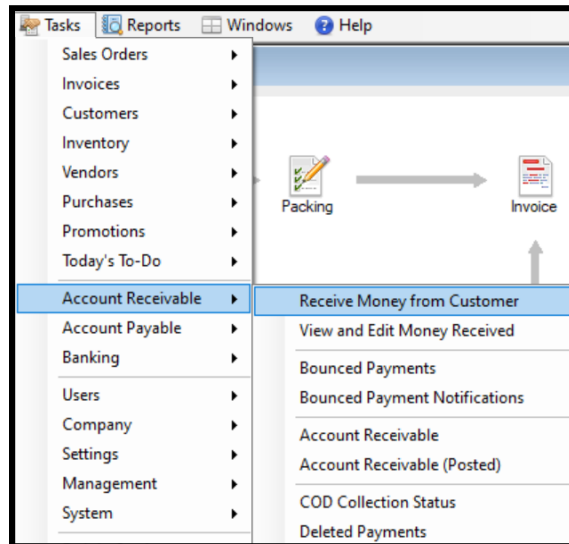- Select 'Create' > Print Invoice.

5. Create a Return Invoice
- Tasks > Customers > Return from Customer > 'New'
- Select Customer > Select Return item(s).

VIII.   ACCT. RECEIVABLE:

1. **Receive Money from Customer**
- Tasks > Account Receivable > Receive Money from Customer.
- Select customer > Enter Amount and Payment Method.
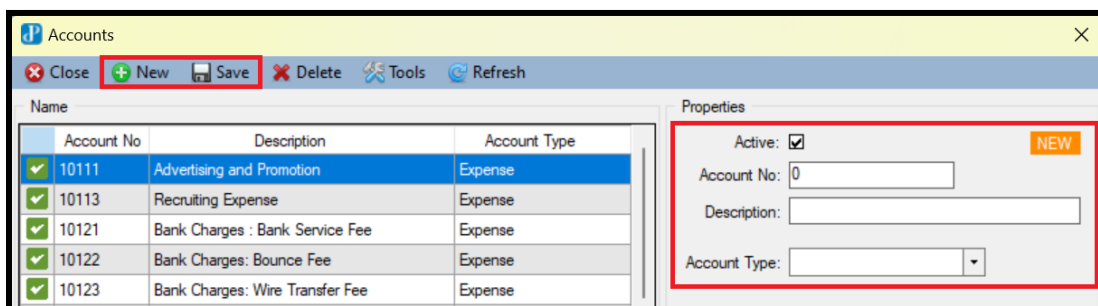- 'Save'.

2. **View Bounced Payments**
- Tasks > Account Receivable > Bounced Payments.

3. **View Account Receivable**
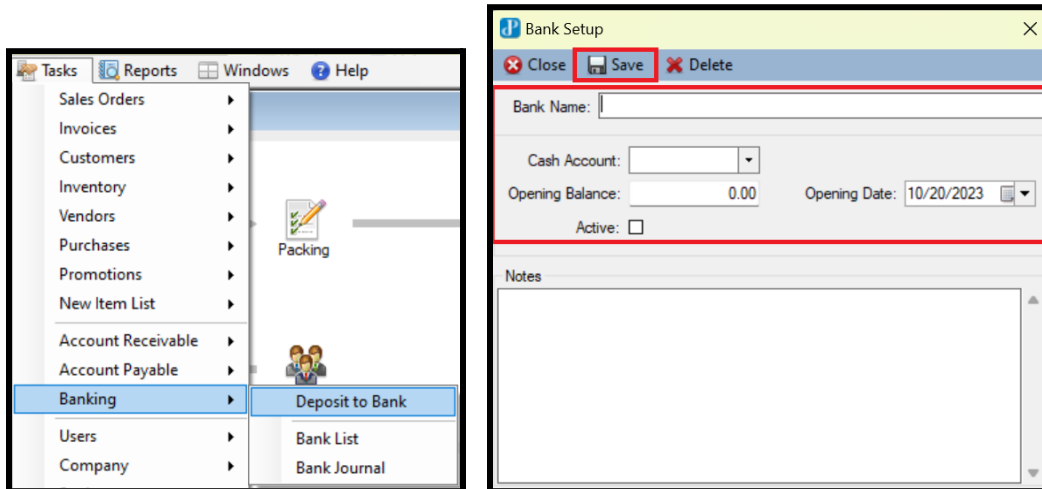- Tasks > Account Receivable > Account Receivable.

4. **Add Financing Account**
- Settings > Accounts > New Account > Enter Account No. and Description.
- Select Account Type.
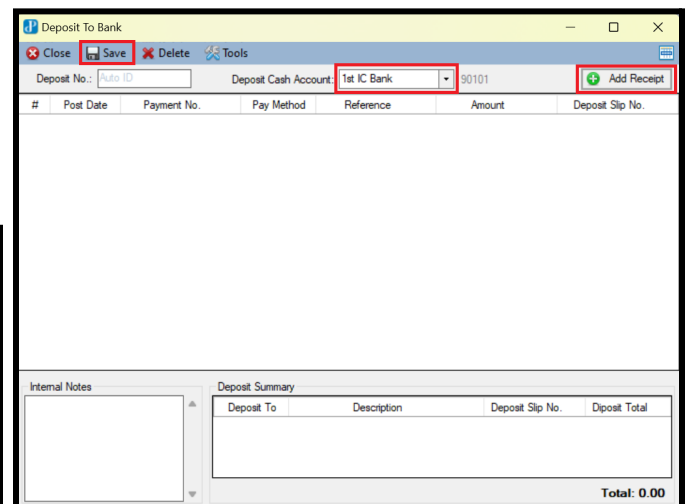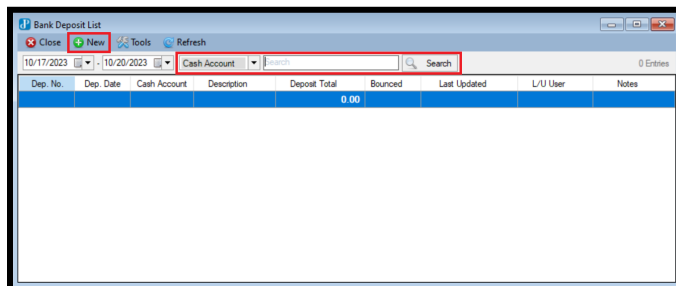- 'Save'.

IX.   BANKING:

1. **Create Bank Account**
- Tasks > Banking > Bank List > New Bank.
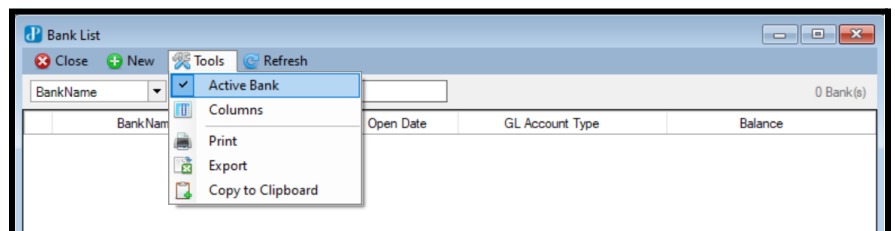- Enter Bank Name > Select Cash Account > Enter Opening Balance and Date > Check box "Active".
- 'Save".

2. **Deposit to Bank**
- Tasks > Banking > Deposit to Bank > New Bank Deposit.
- Select Cash Account > Add Receipt.
- Check box associated with the Name of Receipt List > Apply.
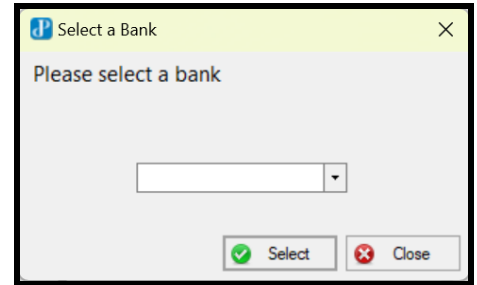- "Save".

3. **View Bank List**
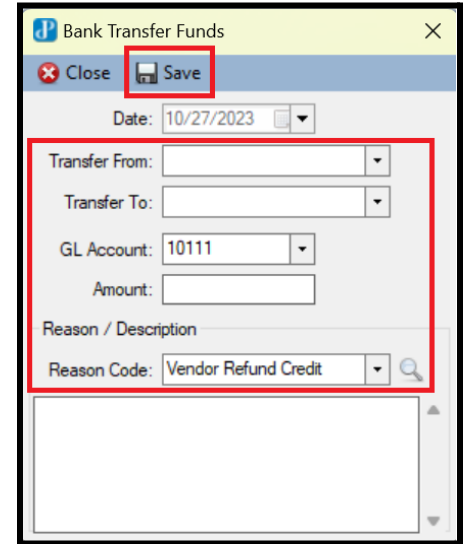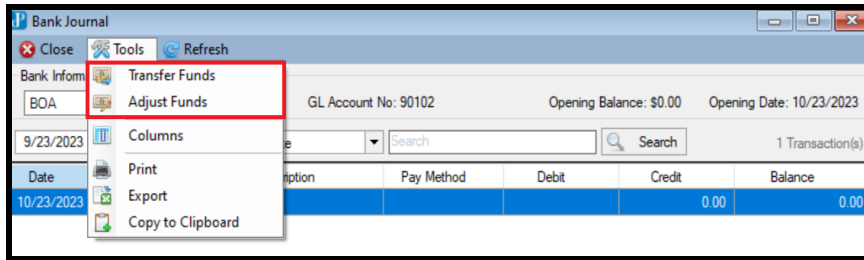- Tasks > Banking > Bank List.
- Tools > Active Bank.

4. View Bank Journal
- Tasks > Banking > Bank Journal.
- Select a Bank using dropdown menu > "Select".

5. Bank Transfer Funds
- Tasks > Banking > Bank Journal.
- Select a Bank using dropdown menu > "Select".
- Tools > Transfer Funds > Select Accounts for transferring and receiving funds > Enter Amount > Select Reason code.
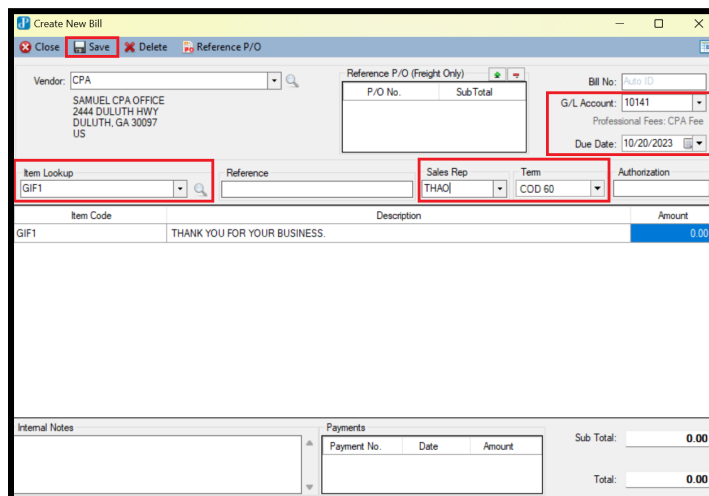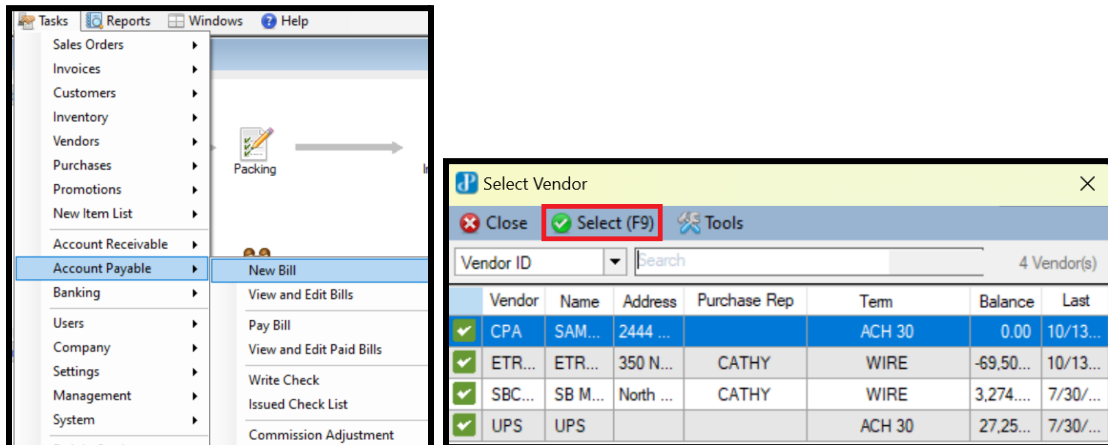- "Save".

6. Bank Adjust Funds
- Tasks > Banking > Bank Journal.
- Select a Bank using dropdown menu > "Select".
- Tools > Adjust Funds > Select GL Account > Enter Amount > Select Reason code.
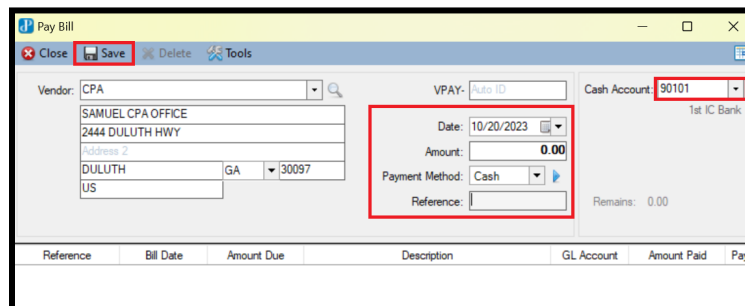- "Save".
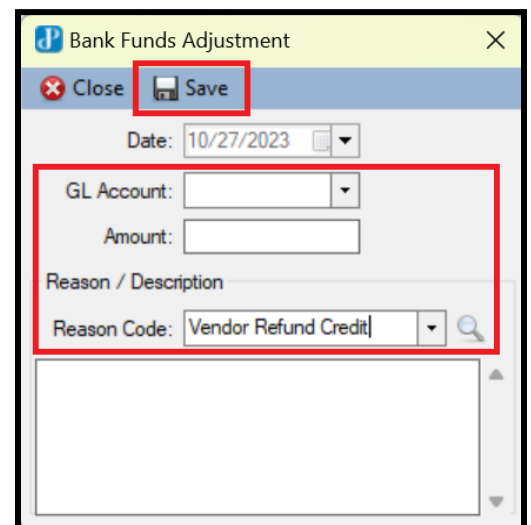
X.   ACCOUNT PAYABLE:

1. Create New Bill
-   Tasks > Account Payable > New Bill.
-   Select Vendor > Select Cash Account > Enter Amount > Select Payment Method > 'Save'.

2. Pay Bill
-   Tasks > Account Payable > Pay Bill.
-   Select Vendor > Check box 'Pay' under Reference list > 'Save'.

3. Write Check
- Tasks > Account Payable > Write Check.
- Select Vendor > Enter check number > Select Cash Account > Lookup Bill > 'Save & Print'.

4. Create Commission Adjustment
- Tasks > Account Payable > Commission Adjustment.
- Select 'New' > Select SalesRep ID > Enter Amount > 'Save'.
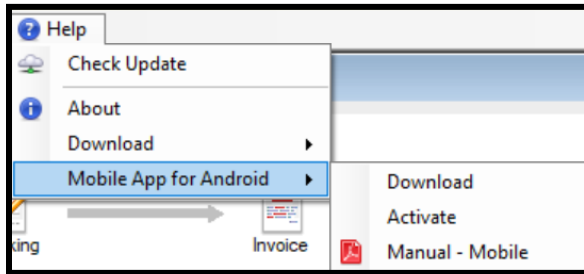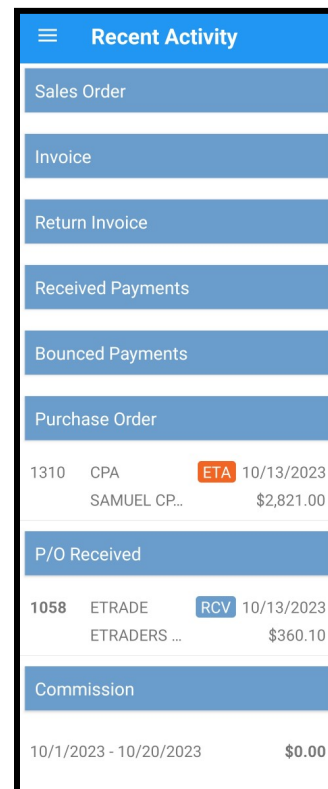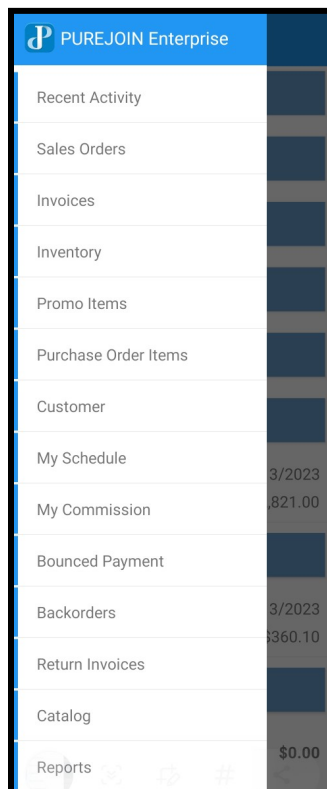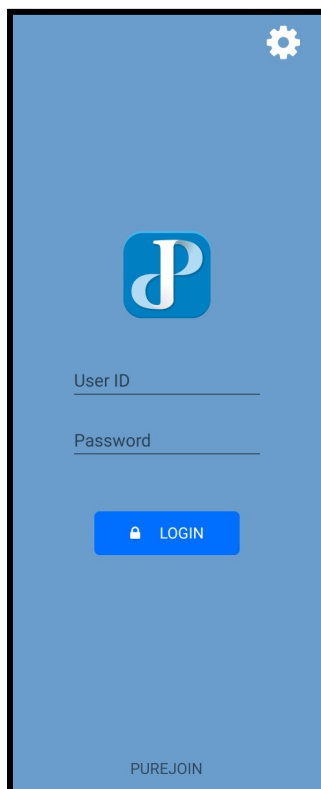
XI. MOBILE APP:

1. Install PUREJOIN Enterprise App
- Help > Mobile App for Android > Download.
- Scan the QR code > Open file > Install App.

2. Activate PUREJOIN Enterprise App
- Enter User ID and Password > Press 'Login' > Scan the QR code > Press 'Login' again.

Appendix. Troubleshooting

Above section briefly describes how to troubleshoot issues that may arise during normal operation of the PUREJOIN Enterprise Program.

    A.   General Troubleshooting
- If you are unable to resolve the issue after reviewing the list and performing the tasks, contact your technical support help desk.

    Technical Support Contact Information
    Phone: (678) 206-0500
    Email: sales@purejoin.com
    URL: www.merchant.purejoin.com

    B.   User Password Forgotten or Lost
- If the user has forgotten or lost their password, please login to administrator account > User List > Select Use > View/ Change password.