



# **PUREJOIN ENTERPRISE MANUAL**

V.104.244.122.227

## **Preface**

PUREJOIN ENTERPRISE User Guide

Version: V.104.244.122.227

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## **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](mailto:sales@purejoin.com)

URL: [www.merchant.purejoin.com](http://www.merchant.purejoin.com)



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The following figure shows the PUREJOIN Enterprise Dashboard.

The screenshot displays the PUREJOIN Enterprise Dashboard with the following components:

- Menu bar (1):** File, Tasks, Reports, Windows, Help.
- Tasks:**
  - Customer:** Sales Order, Packing, Invoice, Receive Payment, Cash/Carry, Statement, Credit Debit.
  - Vendor:** Inventory, Receive Inventory, Write Check, Enter Bill, Pay Bill, Vendor Credit.
- Shortcuts (2):** A central flow diagram connecting Customer and Vendor tasks.
- Backoffice Shortcuts (4):** New Item List, Users, Password Requests, Settings.
- Sales Summary (6):** A table showing sales data for 2021, 2022, and 2023.
 

Month	2021	2022	2023
1	0.00	7,466.60	37,618.05
2	0.00	19,530.50	25,276.65
3	0.00	3,699.75	2,509.60
4	0.00	19,262.15	668.90
5	8,703.80	9,879.25	2,153.40
6	9,926.50	20,289.05	9,612.30
7	13,718.55	12,892.65	1,515.00
8	12,687.00	5,009.60	-80.00
9	9,750.00	5,066.25	0.00
10	5,700.70	8,948.15	445.00
11	38,614.80	16,216.35	0.00
12	35,961.30	37,742.50	0.00
<b>Total</b>	<b>134,962.65</b>	<b>166,002.80</b>	<b>79,718.90</b>
- Who's Online (7):** A table showing active users.
 

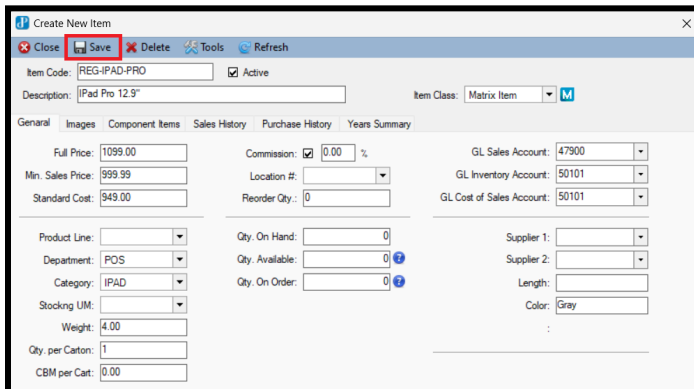
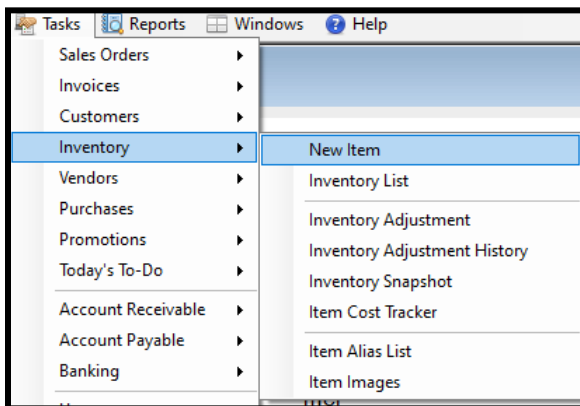
User ID	Login Time	Device
KIM	10/20/2023 10:27:18 AM	
- Check received (3):** A table of post-dated checks.
 

Payment No.	Post Date	Customer ID	Name	Check No.	Amount
PAY-12704	8/1/2023	7164469292	BEAUTY AND SKIN	22	500.00
PAY-12706	8/4/2023	2512877097	VIP BEAUTY SUPPLY	1325	488.07
PAY-11323	8/5/2023	7709958111	JOLLY BEAUTY SUPPLY	0829	2,142.50
PAY-11358	8/8/2023	7709459966	YOON'S BEAUTY DEPOT	0861	648.00
PAY-12603	8/11/2023	8132361310	BEAUTY AND BEAUTY	0274	1,100.00
PAY-11398	9/1/2023	9015900050	HOTBABA BEAUTY SUPPLY	2142	2,171.40
PAY-12831	9/11/2023	9106743089	LOVE BEAUTY SUPPLY	5842	1,533.00
- COD/over 13 days (8):** A table for checks due on account (COD) or over 13 days old.

## I. ITEMS:

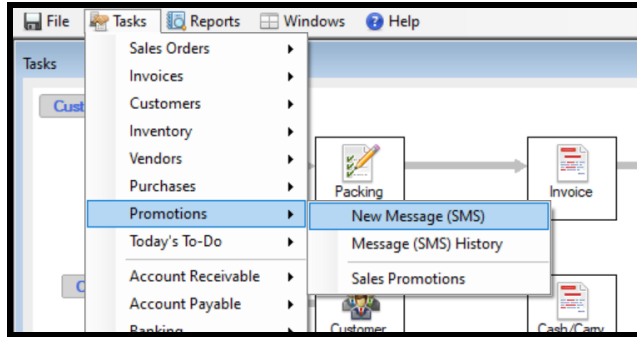
### 1. Create New Item

- 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**

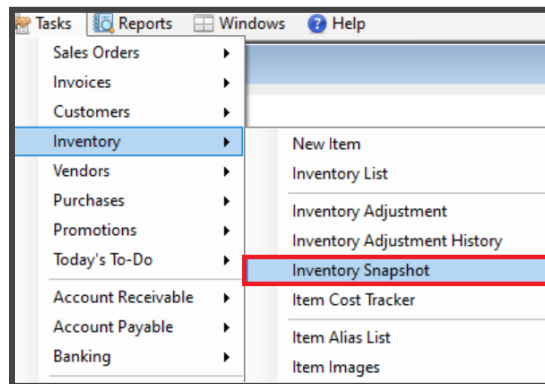
- Tasks > Promotions > New Message (SMS).

**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 %.

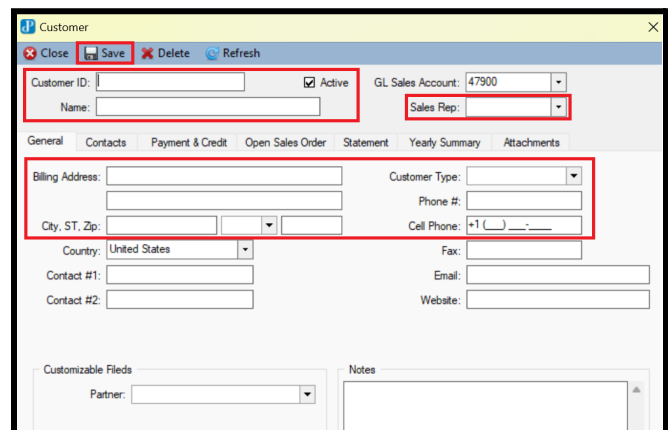
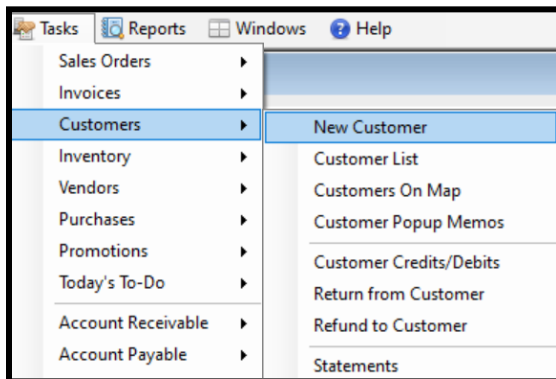


## II. CUSTOMER:

### 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.



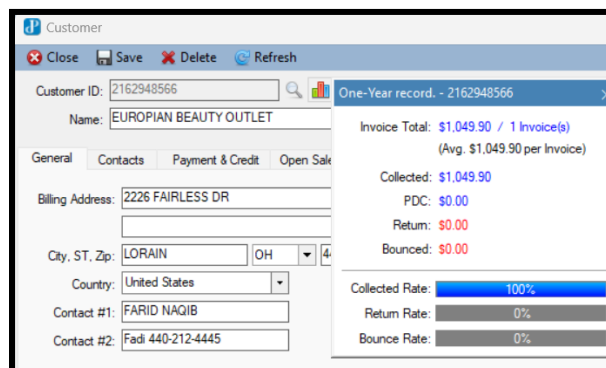
### 2. To Edit Customer Information

- 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

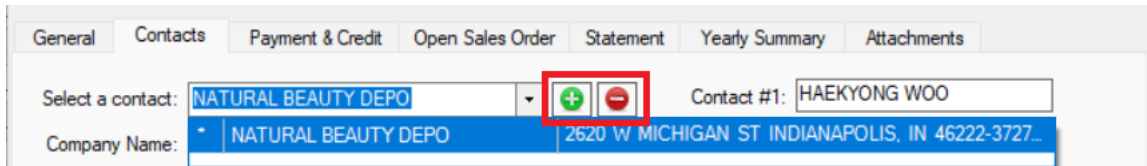
- Tasks > Customers > Customer List > Double click to select a Customer .
- Click on Stats Icon next to Customer ID.





#### 4. Add Multi-locations under one customer

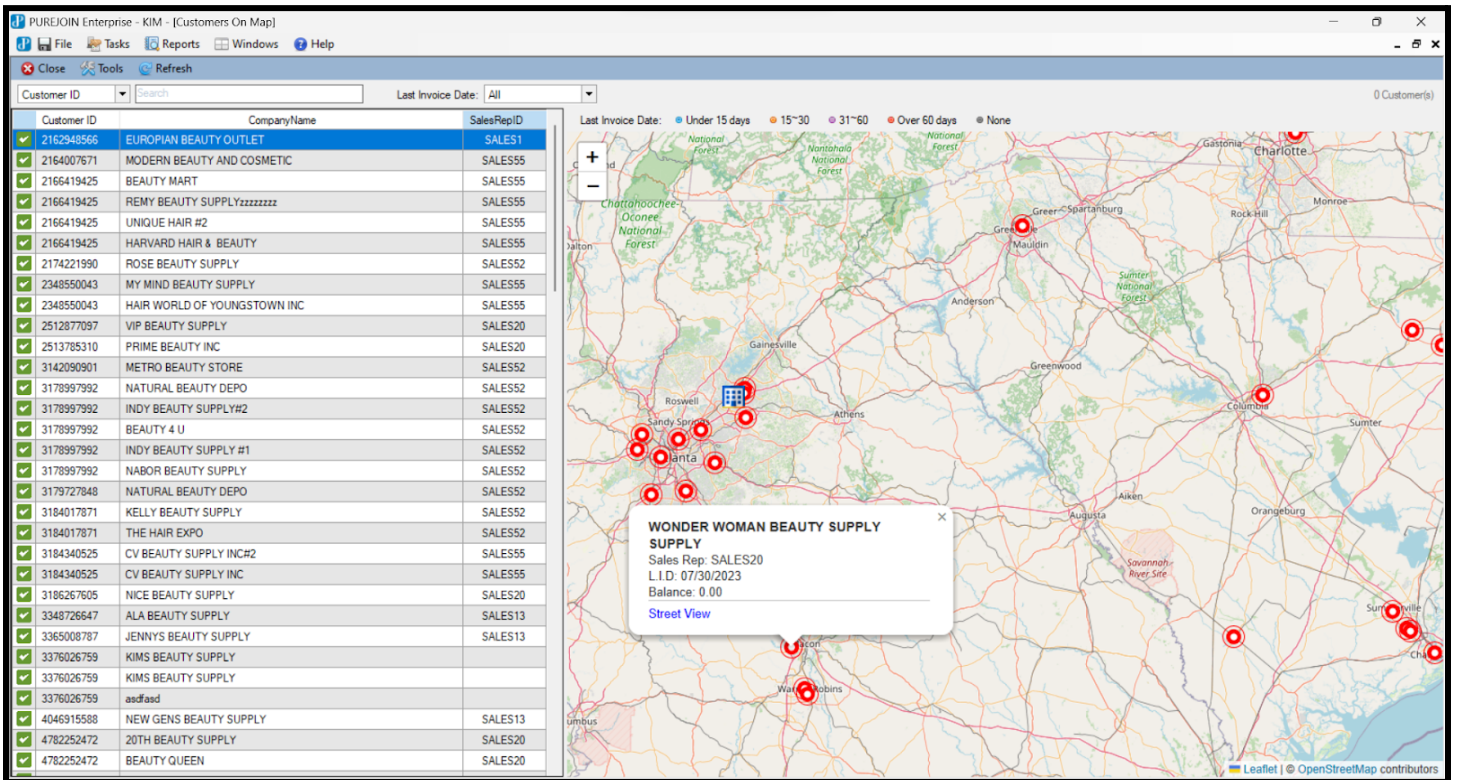
- Tasks > Customers > Customer List
- Customer Type > Enter 'Multi'.
- Go to tab 'Contacts' > Hit green button with plus sign next to Select a contact box to add new contact
- Enter new location information
- 'Save'.
- To view other locations: Click the down arrow next to Select a contact box > Select 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.

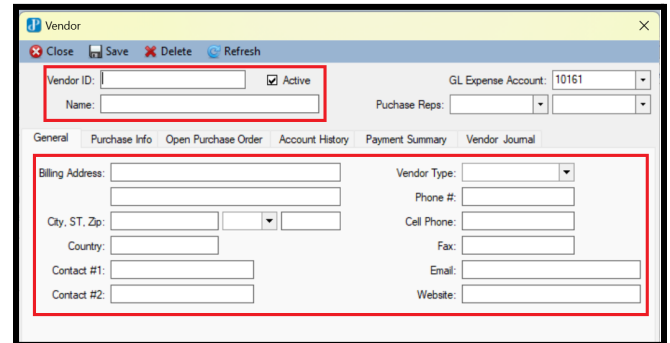
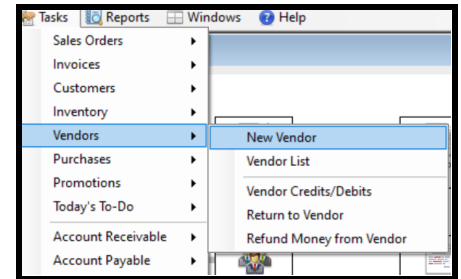
The following figure shows the demo Customer-on-Map.



### III. VENDOR:

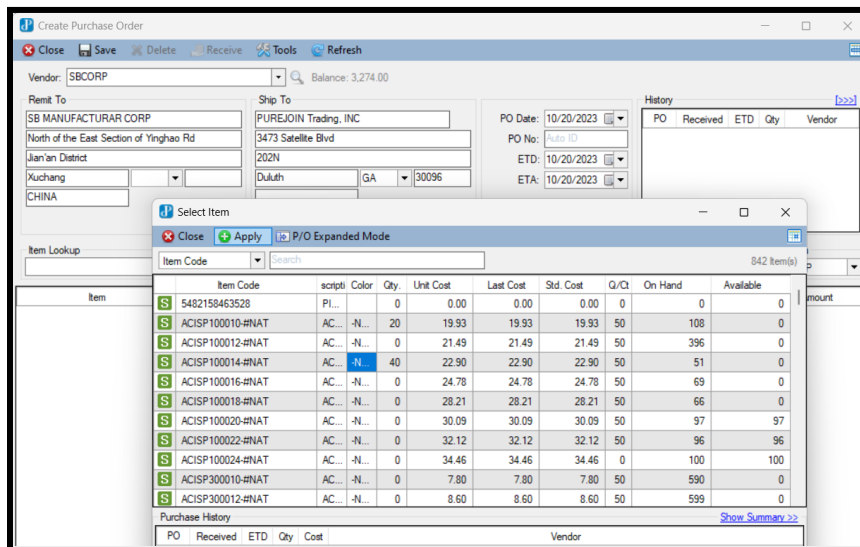
#### 1. Add a Vendor

- 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

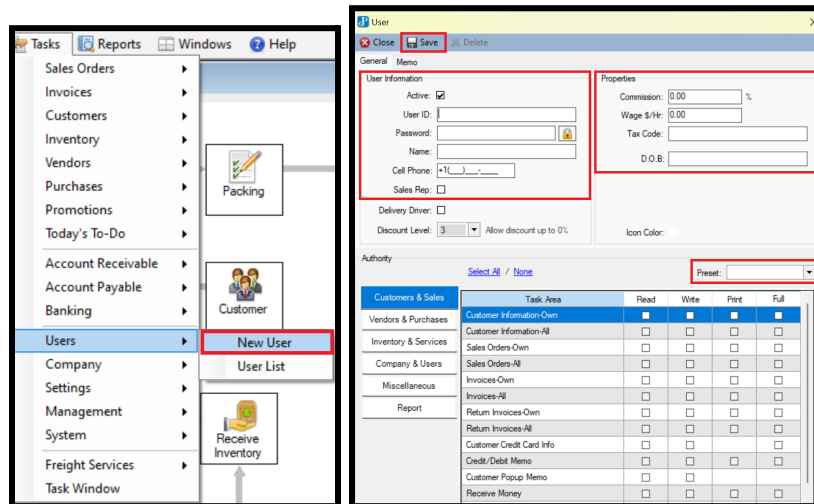
- Tasks > Users > New User.
- Enter User ID, Password and User information.
- Properties > Enter Commission % , Wage per Hour, Tax Code and D.O.B.
- Set User's Authority: Select 'Sales Preset'.

Administrator: full access authority to all Task Areas.

Other Presets: specific access authority to specified Task Areas.

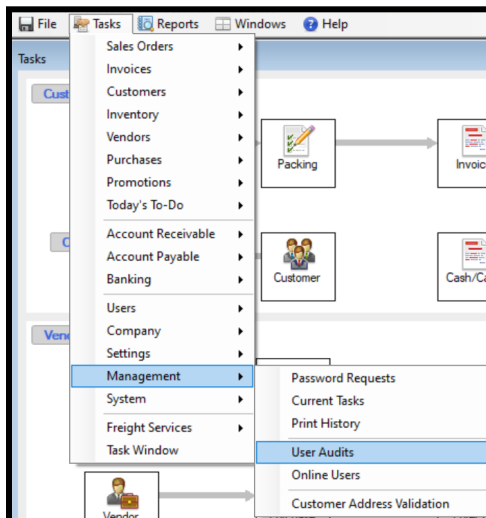
If the user is a sales rep, check the 'Sales Rep' box under User Information.

- 'Save'.



### 2. To view User Auditing - Check real-time user's activity for the past 6 months.

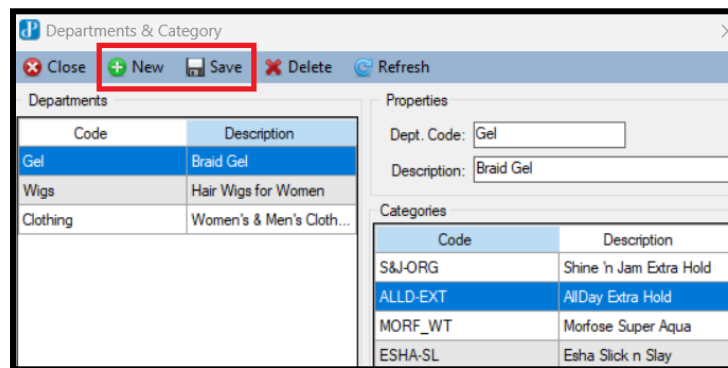
- Tasks > Management > User Audits.



## V. SETTINGS:

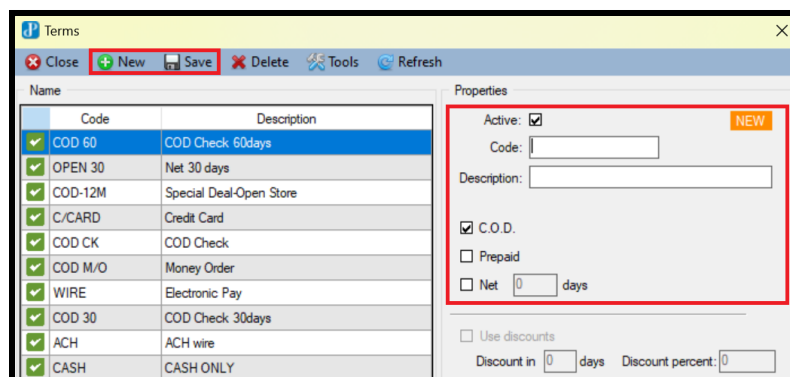
### 1. Create Inventory Department & Category

- 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'.



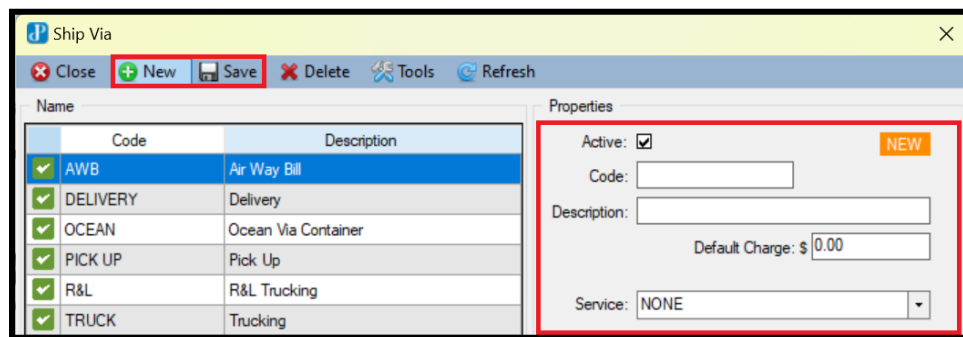
### 2. Create Terms for Payment

- 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'.



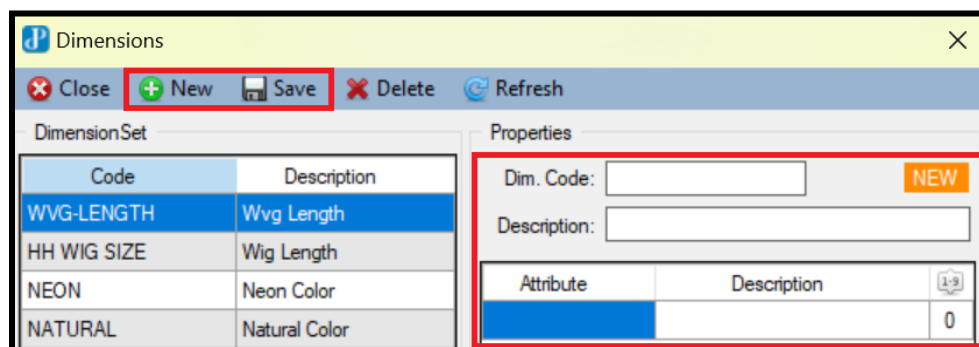
### 3. Create Shipping Options

- 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'.



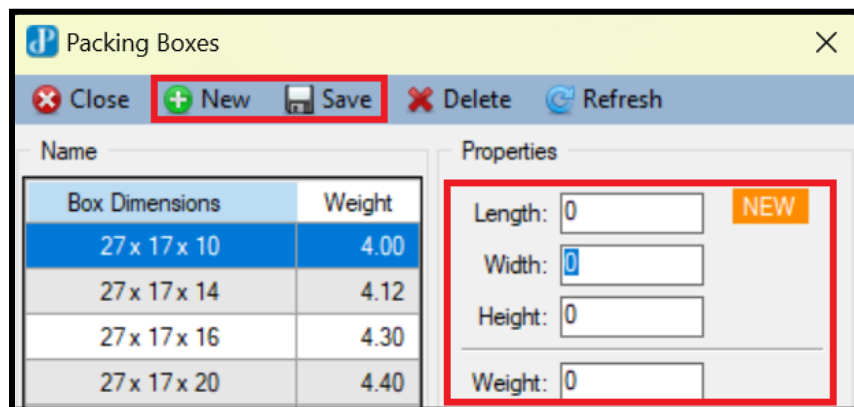
### 4. Create Item Dimensions

- 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'.



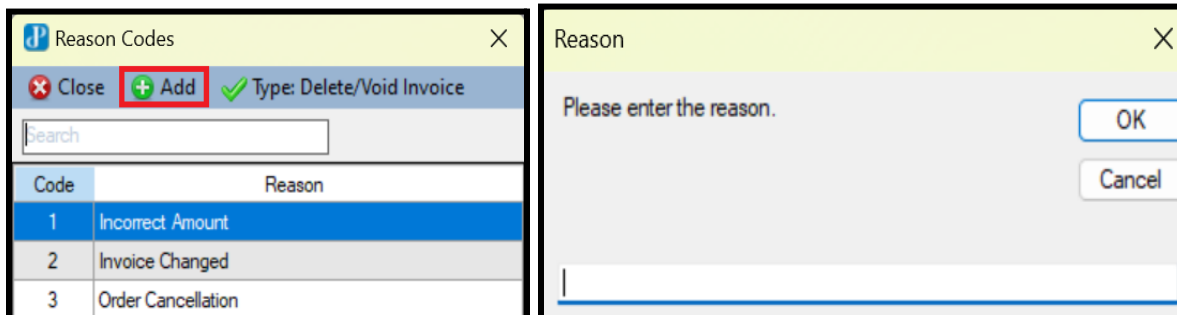
## 5. Create Packing Boxes

- 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'.



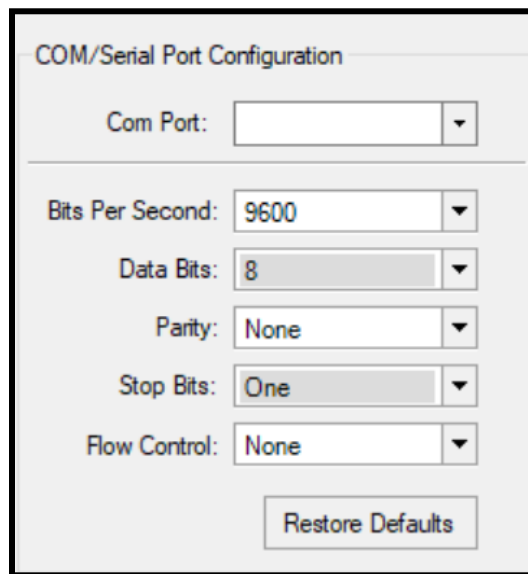
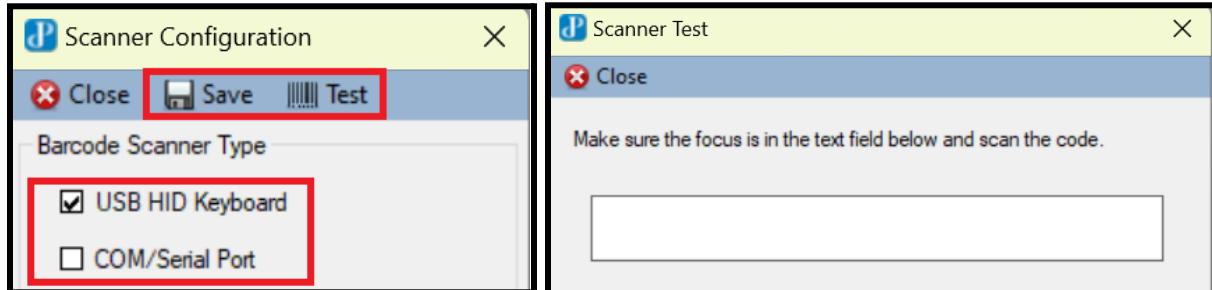
## 6. Create Reason Codes

- 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

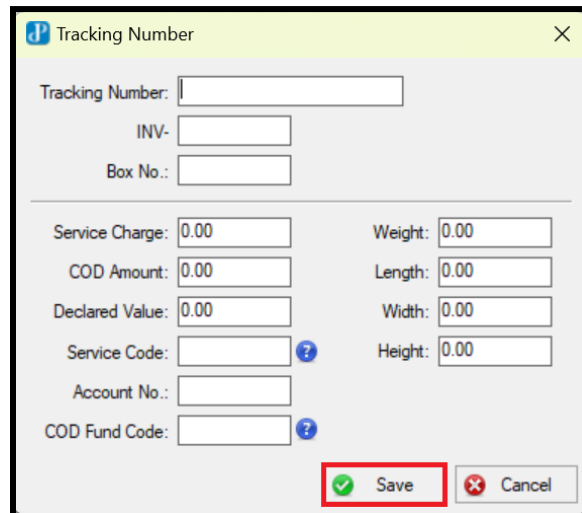
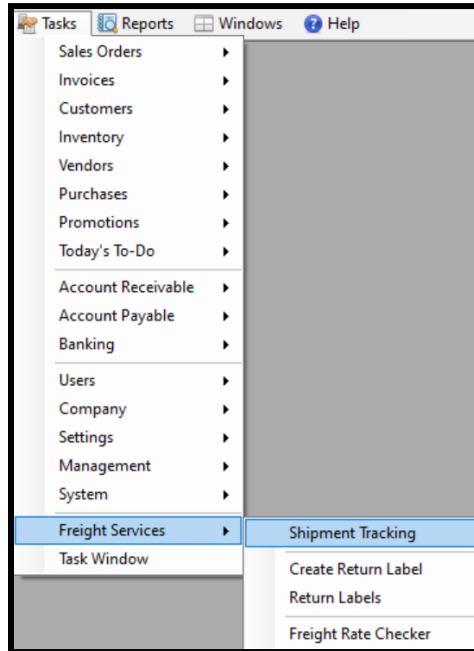
- Tasks > Settings > Barcode Scanner.
- Check box Barcode Scanner Type > 'Save'.
- To edit COM/Serial Port:
  - Check box COM/Serial Port > Select COM Port > Enter configuration data > 'Save'.
- To test Barcode Scanner:
  - Test > Scan barcode.



## VI. FREIGHT SERVICES:

### 1. Shipment Tracking

- Tasks > Freight Services > Shipment Tracking.

A screenshot of a dialog box titled 'Tracking Number'. It contains several input fields: 'Tracking Number:', 'INV-', 'Box No.', 'Service Charge: 0.00', 'Weight: 0.00', 'COD Amount: 0.00', 'Length: 0.00', 'Declared Value: 0.00', 'Width: 0.00', 'Service Code: [ ]', 'Height: 0.00', 'Account No.: [ ]', and 'COD Fund Code: [ ]'. The 'Save' button is highlighted with a red box, and the 'Cancel' button is also visible. There are help icons (question marks) next to the 'Service Code' and 'COD Fund Code' fields.

### 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.



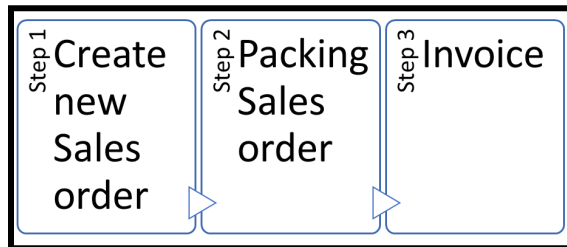


## VII. SALES ORDER:

### 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:



### 2. Create a Sales Order

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

Item	Description	Order	Price	Amount
0-POS-KIT	PUREJOIN POS Kit	1	3150.00	3150.00

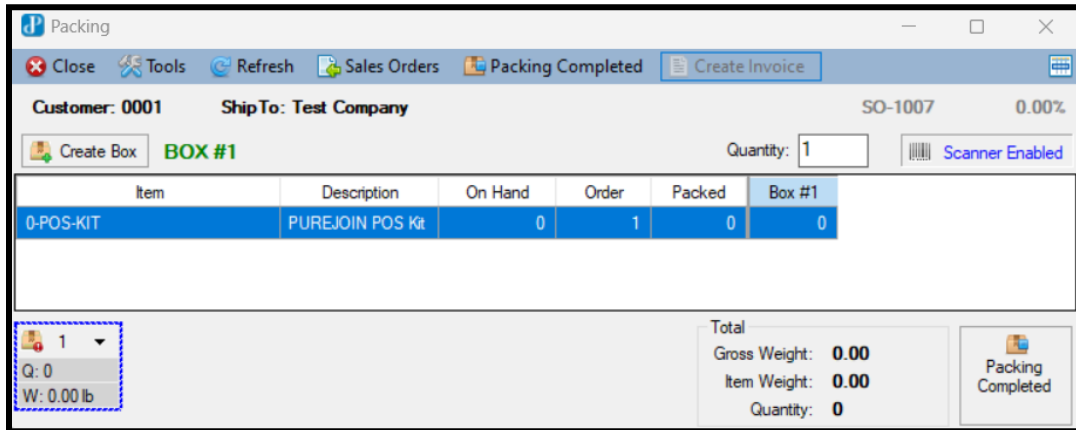
Total Qty:	1
Sub Total:	3150.00
Freight:	0.00
Tax:	189.00
Total:	3339.00

### 3. Packing Sales Order

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

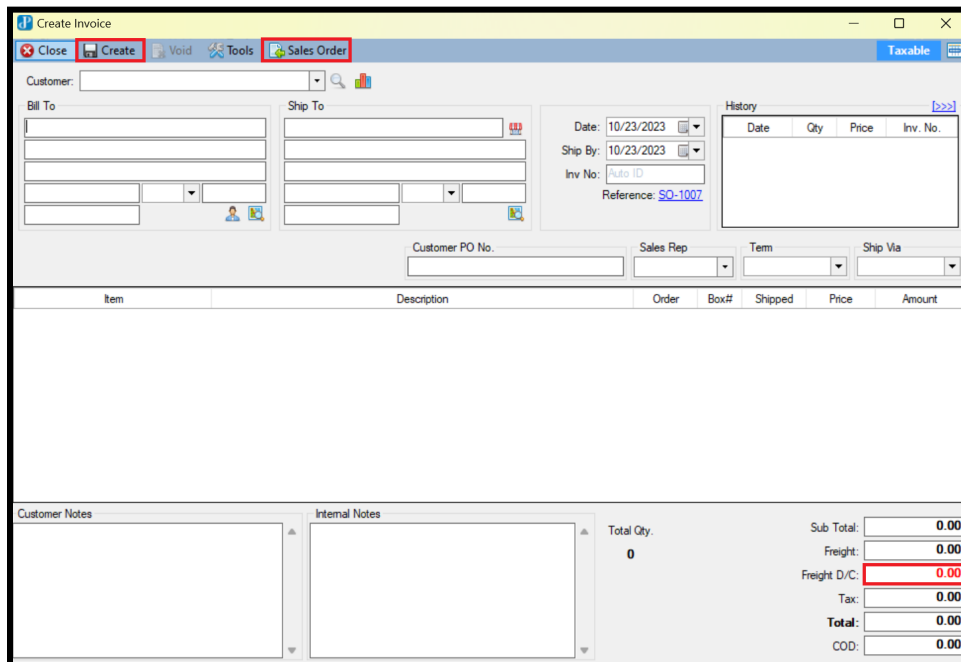
Scanner Enabled mode: Use scanner to scan items before packing.  
 Scanner Disabled mode: Manually enter quantity.

- 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.



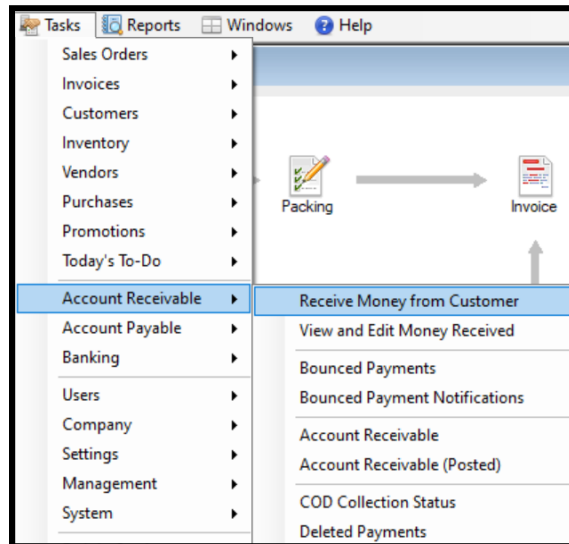
#### 5. Create a Return Invoice

- 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

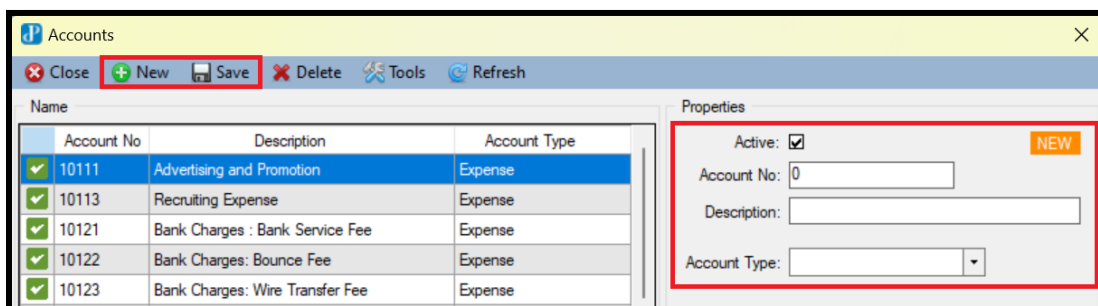
- Tasks > Account Receivable > Bounced Payments.

### 3. View Account Receivable

- Tasks > Account Receivable > Account Receivable.

### 4. Add Financing Account

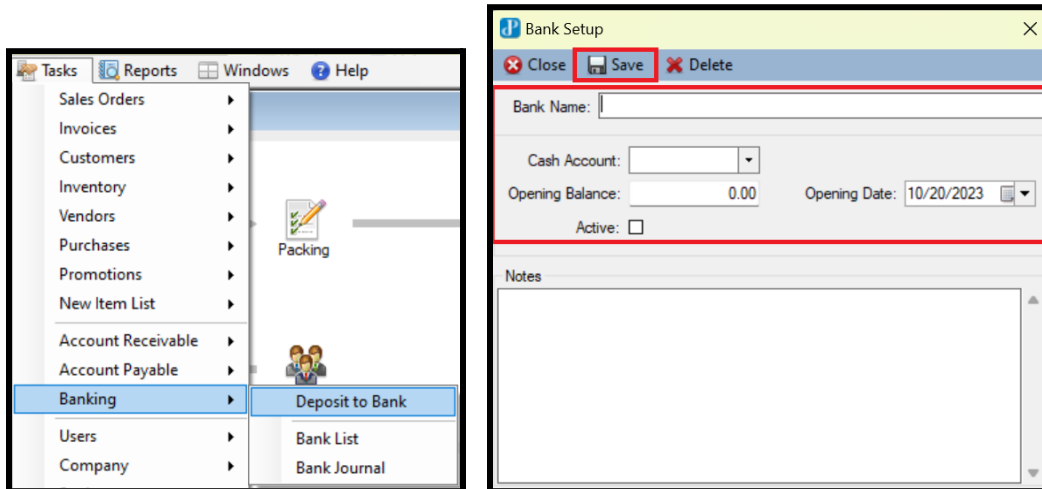
- Settings > Accounts > New Account > Enter Account No. and Description.
- Select Account Type.
- 'Save'.



## IX. BANKING:

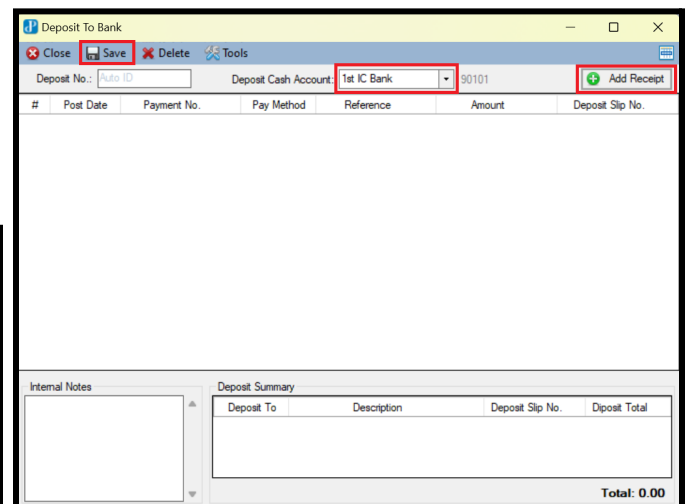
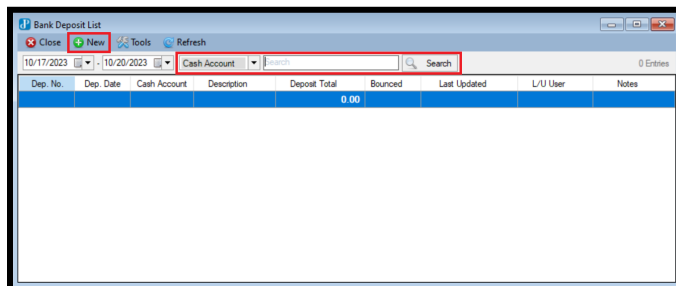
### 1. Create Bank Account

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



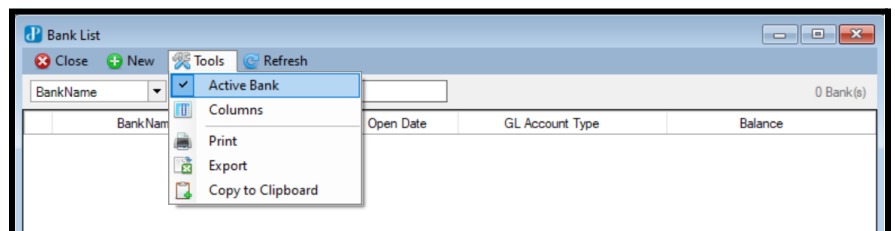
### 2. Deposit to Bank

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



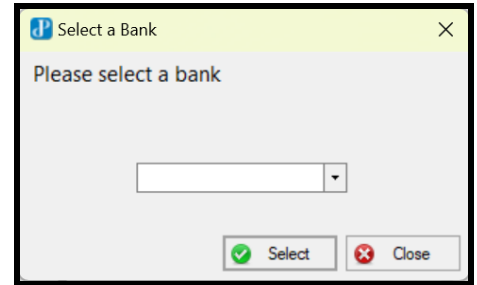
### 3. View Bank List

- Tasks > Banking > Bank List.
- Tools > Active Bank.



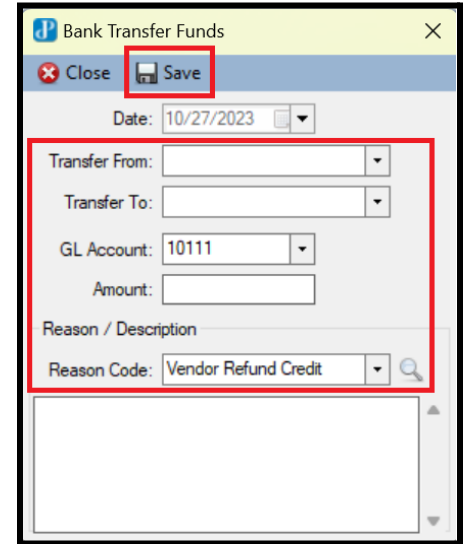
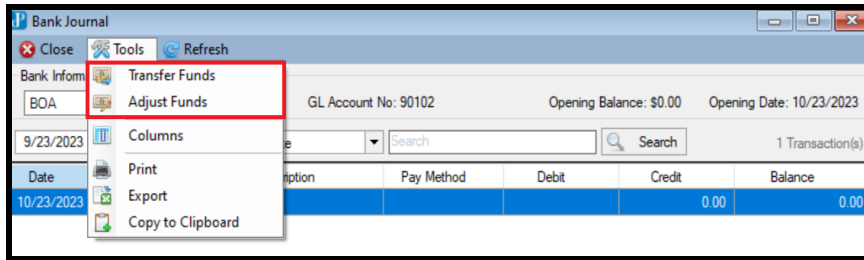
#### 4. View Bank Journal

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



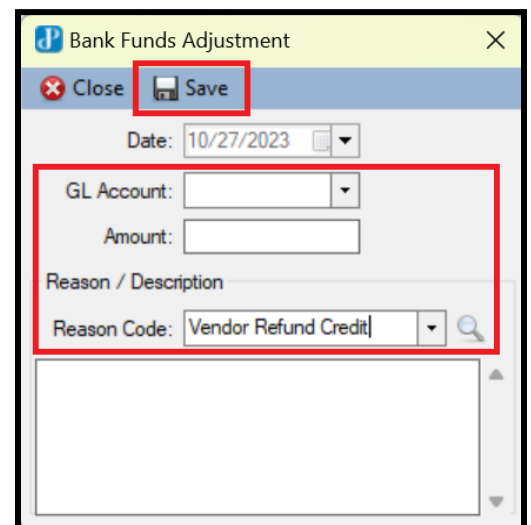
#### 5. Bank Transfer Funds

- 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

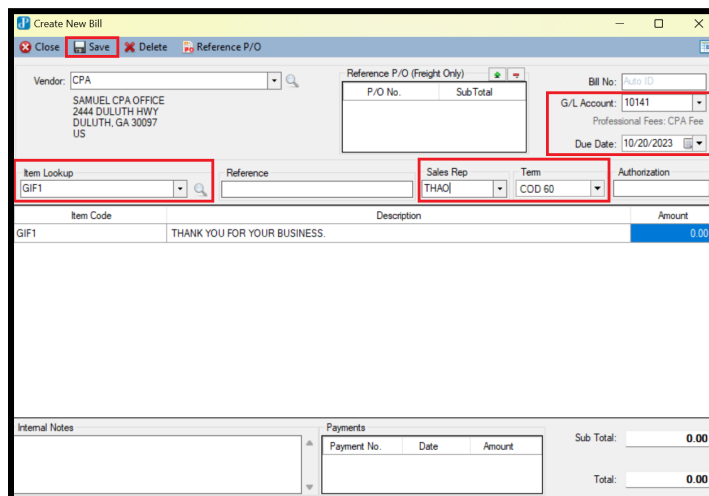
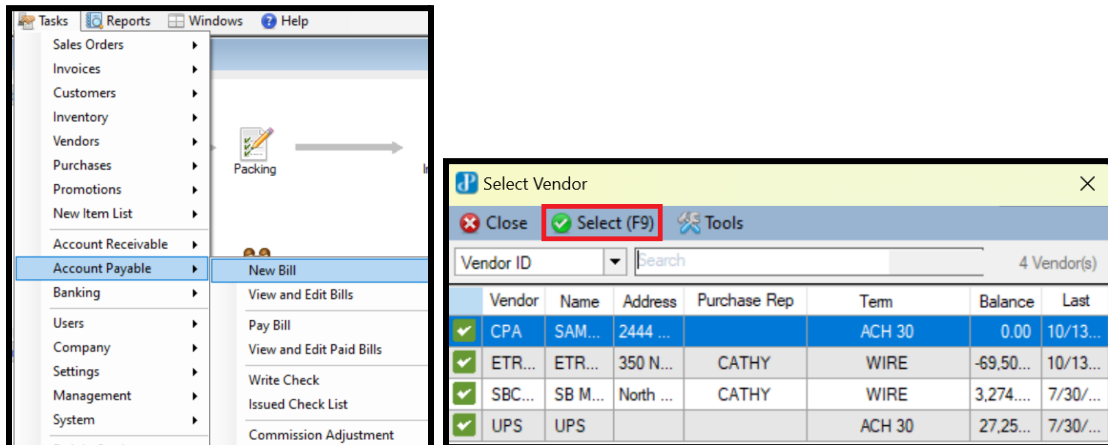
- Tasks > Banking > Bank Journal.
- Select a Bank using dropdown menu > "Select".
- Tools > Adjust Funds > Select GL Account > Enter Amount > Select Reason code.
- "Save".



## X. ACCOUNT PAYABLE:

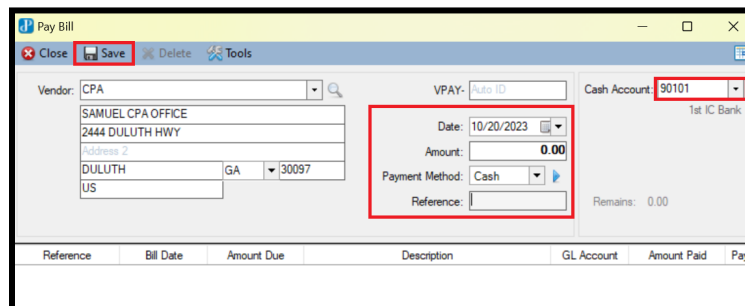
### 1. Create New Bill

- 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'.

Write Checks

Close Save & Print

PUREJOIN Trading, INC

Vendor: CPA

Pay to the order of: SAMUEL CPA OFFICE  
2444 DULUTH HWY  
Address 2  
DULUTH GA 30097  
US

Memo:

Check Number:

Post Date: 10/20/2023

Dollars \$ 0.00

Cash Account:

Bill Lookup

Reference	Date Due	Amount Due	Description	GL Account	Amount Paid	Pay
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### 4. Create Commission Adjustment

- Tasks > Account Payable > Commission Adjustment.
- Select 'New' > Select SalesRep ID > Enter Amount > 'Save'.

Commission Adjustment

Close + New Tools Refresh

4/20/2023 10/20/2023 Date Search 0 Entries

Date	SalesRep ID	Amount	Memo	User ID	Last Updated
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Commission Adjustment

Date: 10/20/2023

SalesRep ID:

Amount: 0.00

Memo

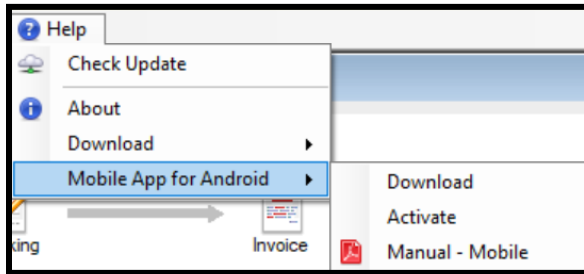
Save Cancel



## XI. MOBILE APP:

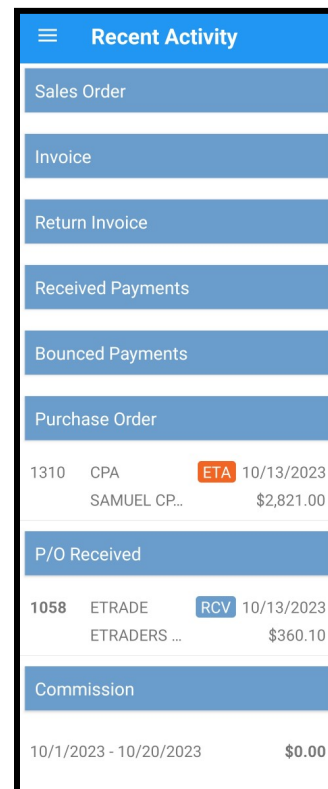
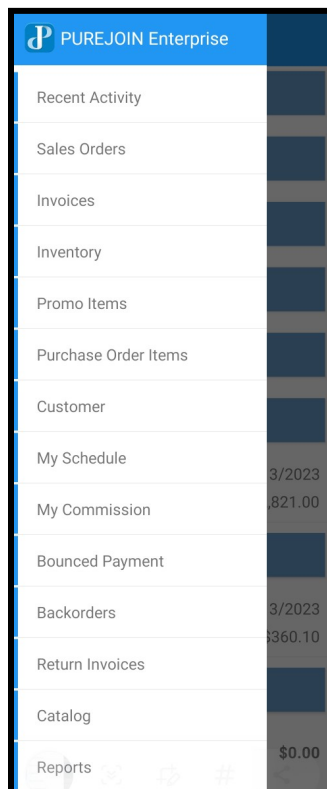
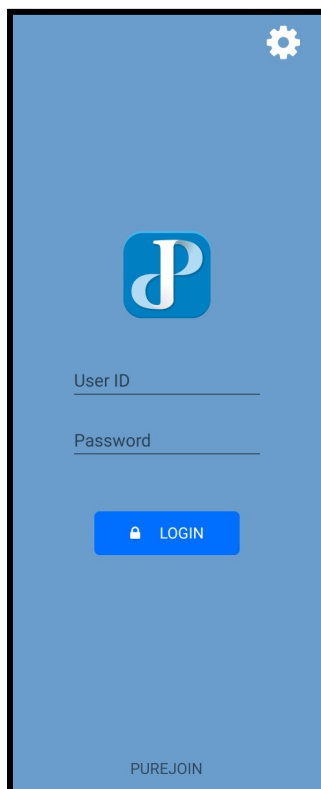
### 1. Install PUREJOIN Enterprise App

- 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](mailto:sales@purejoin.com)

URL: [www.merchant.purejoin.com](http://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.