EVOZO

Step-by-step guides and answers for every module

Help Guide

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This guide covers all EVOZO modules. Your organization may use only some of them; the Help window in the app shows only what applies to your organization and your role.

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Getting started

Sign in

Sign in as the organization's root user or as an IAM user, recover a forgotten password, and change your password.

Before you start

- IAM users need the Account ID, IAM username and password from their administrator.

Steps

1. Open the sign-in page.
2. Choose **Root user** or **IAM user**.
3. As an IAM user, enter **Account ID**, **IAM username** and **Password**.
4. Select **Sign in**. Or select **Continue with Google** if you use Google.
5. To use a different account, select **Switch account**.
6. Forgot the password of an email sign-in? Select **Forgot password?**, enter your email and select **Send reset link**. Open the link in the email (it works once, for 1 hour), enter the new password twice and select **Set new password**.
7. Forgot the password of an IAM user? Select **Forgot password?** in IAM user mode. Ask your organisation's owner or admin to reset your password in Identity & Access. No email is sent.
8. Still stuck? Select **Having trouble signing in?** for help with both kinds of sign-in.
9. To change your password while signed in, open your user menu in the header and select **Profile**. Enter your current password and the new password twice, then select **Change password**.
10. IAM users can turn on two-step verification on the same page with **Set up two-step verification**.

While sign-in finishes

After you sign in, for example after **Continue with Google**, you may see a plain page that says **Signing you in…**. Opening the app while signed out shows the same page before you are taken to sign in. Wait a few seconds. You are then taken to the page you first asked for, or to the dashboard.

1. If the page says **We couldn't start the sign-in. Please try again.**, select **Retry** and sign in again.
2. If the page shows an error message, such as "Sign-in was cancelled or failed" or "Missing authorization code from the sign-in provider.", select **Back to sign in** and sign in again.
3. If **Signing you in…** stays on screen for more than a minute, close the tab, open the app again and sign in again. If it keeps happening, see the page on trouble signing in.

Tips

- Select **Logout** in the header when you finish on a shared device.
- Resetting or changing your password signs you out on every other device.
- After you ask for a reset link, the page shows the same message whether or not the address has an account, so nobody can use it to find out who uses EVOZO. An email is only sent to an address that has an account.

- If you use **Continue with Google**, your password is managed by Google.
- If you sign in with Google on an account whose email was never verified, that account's password is removed. Select **Forgot password?** to set a new one if you want to sign in with email again.

Questions

Q: I opened the EVOZO demo at demo.evozo.ph. How do I sign in?

A: The demo has no password or sign-up page. Select **Try the demo** on evozo.ph and fill in the form; you are taken straight into the demo organisation as its owner. The link works once and only for a few minutes. If the demo says the link has expired or was already used, go back to evozo.ph and request a new one. Use **View as** in the bar at the top of the demo to see the app as another role. The demo organisation is sample data that resets every night at 12:00 midnight PHT.

Q: I am the owner and I lost access to my email too. What now?

A: Contact EVOZO support at support@evozo.ph. EVOZO checks that you own the organization before anything is changed.

Q: I lost my authenticator app. How do I sign in?

A: Ask your organisation's owner or admin to remove two-step verification for you in Identity & Access.

Welcome to EVOZO

EVOZO keeps your products, stock, sales and people in one place, so a shop, café, workshop or hardware store can run from the same records.

What EVOZO is for

- Selling: ring up customers at a till, or write quotations and sales orders for bigger jobs.
- Stock: know what you have, receive deliveries, move goods between places and fix mistakes with a record.
- Products: keep one list of what you sell, with units, packs and prices.
- People: decide who can do what, so a cashier and an owner see different things.

Which parts you see depends on your roles and on what your organization uses. If a page or button is missing, ask an owner or admin.

How the help is organised

- **Start here** holds these pages. Read them in order if you are new.
- Each module has its own guides: short steps for one task, with the exact button names in bold.
- Question pages (FAQs) answer the problems people meet most.
- Open **Help** from the app and type in **Search help** to find a topic by any word.
- On a page, the Help window opens on the topic for the screen you are on.

Where to go next

1. How EVOZO is organised (see How EVOZO is organised) explains modules, your organization, locations, users and roles.
2. How records work (see How records work) explains drafts, approvals and why nothing is silently deleted.
3. First-day setup checklist (see First-day setup checklist) takes you from an empty account to your first sale.

4. What do you want to do? (see What do you want to do?) lists tasks and the topic for each.
5. Getting help (see Getting help) covers search, questions and contacting EVOZO support.

How EVOZO is organised

Learn how modules, your organization, locations, users and roles fit together.

Your organization

Your organization is your business account. Everything you enter (products, stock, sales, users) belongs to it, and other organizations cannot see it. If you belong to more than one, you pick the one you work in. See Switch organization (see Switch organization).

The profile, branding and tax details of your organization are under **Organization & Settings**, on the **Profile & Branding** and **Tax & Financial Master** pages. See Organization settings (see Organization settings).

Modules

A module is one area of work. Examples: **Product Management** for your product list, **Inventory & Warehouse** for stock, **POS Terminal** for the till, **Identity & Access** for people. Open **All modules** in the header and use **Search modules…** to find one. See Find modules (see Find modules).

You only see the modules your organization uses and that your roles allow.

Branches and locations

- **Warehouses** (under **Inventory & Warehouse**) are the places where stock is kept. A café's back store and a hardware shop's yard can each be one. Stock is always counted per place.
- **Facilities** lists your sites: warehouses, plants, stores and offices.
- **Legal Entities & Branches** (under **Organization & Settings**) is for businesses that run more than one registered entity or branch. It shows only to people with permission to read it.

A small shop with one place can keep it simple: one warehouse, one till.

Users and roles

- A user is a person who signs in. Owners and admins add users under **Identity & Access**. See Users and roles (see Users and roles).
- A role is a set of permissions. A person can hold several roles. The core roles are owner, admin, employee and guest, and each module has its own roles, such as a cashier or a warehouse operator. See Roles (see Roles).
- Roles decide which pages and buttons appear. Give people only what they need.

For example, a cashier at a hardware counter can ring up sales but cannot change the organization's tax settings, because that needs an owner.

Switch organization

Change the organization you are working in, or create a new one.

Steps

1. Open the organization menu in the header.
2. Type in **Search organizations…** to filter the list.
3. Select the organization you want.
4. To create one, select **New Organization**.

Tips

- A DinksyRush club in the list carries a **DinksyRush club** label under its name. That is its home workspace, where it is branded and billed. You sign in with your EVOZO sign-in and can still open the club here. See See a DinksyRush club's bookings (see See a DinksyRush club's bookings).
- Your roles can differ between organizations, so pages may change after you switch.

Find modules

Open a module from the header.

Steps

1. Select **All modules** in the header.
2. Type in **Search modules…** to narrow the list.
3. Select the module you want.

Tips

- A module you cannot see may need a role you do not have. Ask your administrator.

How records work

EVOZO works from records, not from numbers you type over. Knowing four rules explains most of what you see on screen.

1. Documents start as drafts

A document, such as a quotation, a purchase order or a stock adjustment, is first saved as a draft. Some documents then wait for someone with approval permission. Only after that do they take effect.

Example: a café writes off spoiled milk. The write-off is created as a draft. A manager then clicks **Post Adjustment** to take the stock out, or **Void** to discard it. See Adjust or write off stock (see Adjust or write off stock).

Which steps a document goes through depends on the document. The status shown on the screen tells you where it is.

2. Nothing is silently deleted

Records are corrected by adding another record, not by erasing the first one.

- Stock movements are only ever added. A mistake is fixed with an adjustment, which is itself a record.

- Customer payments and what they were applied to are only added.
- The audit trail is add-only. The system refuses to change or remove its entries.

If you need to undo something, look for **Void**, a return, a refund or a reversing adjustment on the document, rather than a delete button.

3. Every change keeps who and when

The audit trail records the user, the action, the module and the time for each logged action. Ask an owner or admin if you need to find out who did something.

4. Stock and statuses are worked out, not typed

- Stock moves come from documents. Quantity changes only through a receipt, a sale, an adjustment or a transfer. You do not type a new total for a product. To set starting balances, use Set opening stock (see Set opening stock), which is also a recorded document. A delivery is received (see Receive stock) once, and a count that differs from the system is fixed by an adjustment.
- Statuses come from records. Money status follows payments, not a tick box. For example, a deposit on a sales order shows as due, partial or held because of the payments applied to that order; the figure kept on the order is only a copy that is checked again each time. For till sales, see Take payment (see Take payment).
- Totals and tax at the till are calculated by the server, not typed in.

Tips

- If a number looks wrong, open the documents behind it (receipts, sales, adjustments) instead of looking for a place to overwrite it.
- Cost is the same: stock received without a known cost is counted, but marked **Needs cost** until someone fills it in. See Receive stock (see Receive stock).

First-day setup checklist

Set up EVOZO in the order below, from your organization's details to your first sale. Tick each step as you go.

Before you start

- Sign in as an owner. Only an owner can change the organization name, address and tax details. See Sign in (see Sign in).
- Some steps need a role you may not hold. If a page is missing, ask an owner or admin.

Checklist

1. Organization details and tax. Open **Organization & Settings**. On **Profile & Branding**, check your name and address. On **Tax & Financial Master**, enter your **Tax Identification Number (TIN)**. Turn on **BIR 12% VAT Registered** only if you are VAT registered, then check **VAT rate (%)** and **Prices include VAT**, and select **Save Settings**. See Organization settings (see Organization settings).
2. Users and roles. Open **Identity & Access**. Add your staff with **New IAM user** or **Invite member**, and give each person only the roles they need, using **Edit roles**. A cashier needs the till roles; a stockroom person needs the warehouse roles. See Users and roles (see Users and roles).
3. Products. Add products one at a time, or upload many from a file. A hardware shop with hundreds of items should upload; a café with a short menu can add them by hand. See Add a product (see Add a product) and Upload products (see Upload products). For sizes, colours and packs, see

Variants and pack units (see Variants and pack units).

4. Opening stock. Record what you already have, using **Opening Stock** in the Inventory menu. See Set opening stock (see Set opening stock). Later deliveries go through Receive stock (see Receive stock).
5. A till (terminal) and a shift. Check the terminal you will use under **Terminals** in **POS Terminal**. Each day, open a shift with **Start Shift**, and count the cash into **Opening Cash Float**. See Open a shift (see Open a shift).
6. Your first sale. Add a product to the cart, then pay. See Sell at the till (see Sell at the till) and Take payment (see Take payment).
7. End of day. Close the shift and read the report. See Close the shift and read the shift report (see Close the shift and read the shift report).

Tips

- Do the checklist once with a test product and a small sale so you know the screens before real customers arrive.
- If you sell by order or quotation instead of at a counter, use Create a sales order (see Create a sales order) for step 6.

The home screen and setting up a new organisation

The home screen you land on after signing in, and the setup screens a person sees when they belong to no organisation yet.

The home screen

After you sign in, EVOZO opens the dashboard. It shows three cards under the heading **EVOZO Ecosystem Platform**:

- **Active Organization Scope** shows the current organisation's name, its ID and its plan.
- **API HTTP Interceptor** shows a connection status line, the organisation header being sent and the address the app talks to.
- **Design System & Theme State** shows whether the screen is in light or dark mode, with a **Toggle Theme** button to switch.

The dashboard does not show sales or stock figures. Use the menu to open a module.

Setting up a new organisation

A person who is signed in but belongs to no organisation is sent to the setup screen. It says **No organizations yet**. Ask an organisation owner to invite you, or create your own.

1. Select **Create organization**. Or select **Sign in with a different account** to leave.
2. Step 1, **Workspace**: enter the **Organization Name** and the **Workspace Subdomain**. The subdomain fills in from the name and can be changed. It needs 3 to 63 letters, numbers or hyphens, and cannot start or end with a hyphen. Select **Continue to Plan Selection ->**.
3. Step 2, **Select Plan**: pick **Monthly**, **Quarterly** or **Yearly** billing. Then choose **Preset Bundles** and select a plan, or choose **Custom Modular Builder** and pick the modules you want. The bar at the bottom shows the **Period Total**. Select **Continue to Payment ->**.
4. Step 3, **Payment & Launch**: check the **Order Summary**. Choose a payment method. If you have a code, enter it under **Early Access Voucher / Promo Code** and select **Apply**. Select the launch button, which reads **Pay** with the amount, or **Activate workspace** when nothing is due.

5. If a payment is due, you are sent to the payment page. When you come back, the screen **Activating your workspace…** waits for the payment to be confirmed and then opens the dashboard of the new organisation.

If the wait takes long, the screen says **Confirmation can take a minute**. Do not pay again. Select **Check again**, or **Start over** to return to the payment step. If the screen says **This payment session has expired**, select **Check again** or **Start over**. If it says **This order did not go through**, select **Back to payment**. Contact EVOZO support at support@evozo.ph if you were charged.

Tips

- Someone who already has an organisation can add another from the organisation switcher; the same steps apply, and **Cancel** returns to where they were.
- If the subdomain is already taken, the screen says so and returns to step 1.
- To set up the new organisation after it is created, see the first-day setup page.

What do you want to do?

Find the topic for the job in front of you. You only see the topics your roles allow.

Get into the app

I want to	Open
Sign in	Sign in (see Sign in)
Switch to another organization	Switch organization (see Switch organization)
Find a module	Find modules (see Find modules)
See what a role can do	Roles (see Roles)

Set up my business

I want to	Open
Change my name, branding or VAT settings	Organization settings (see Organization settings)
Add a staff member or change their roles	Users and roles (see Users and roles)
Add one product	Add a product (see Add a product)
Add many products from a file	Upload products (see Upload products)
Change a product	Edit a product (see Edit a product)
Sell by size, colour or pack	Variants and pack units (see Variants and pack units)

Stock

I want to	Open
Enter the stock I already have	Set opening stock (see Set opening stock)
Receive a delivery	Receive stock (see Receive stock)

I want to	Open
Move stock to another warehouse	Transfer stock between warehouses (see Transfer stock between warehouses)
Fix a count or write off damaged goods	Adjust or write off stock (see Adjust or write off stock)
Count what is on the shelf	Run a cycle count (see Run a cycle count)
Record stock used by the business itself	Record internal consumption (see Record internal consumption)

Sell at the counter

I want to	Open
Start the day at the till	Open a shift (see Open a shift)
Ring up a sale	Sell at the till (see Sell at the till)
Take cash, card or QR payment	Take payment (see Take payment)
Give a discount	Discounts and manager approvals (see Discounts and manager approvals)
Refund or take a return	Refunds and returns (see Refunds and returns)
Sort out a payment that did not finish	Payments to resolve (manager) (see Payments to resolve (manager))
End the day and read the report	Close the shift and read the shift report (see Close the shift and read the shift report)

Quote and take orders

I want to	Open
Write a quotation	Create a quotation (see Create a quotation)
Reuse a quotation layout	Quotation templates (see Quotation templates)
Turn an accepted quotation into an order	Turn an accepted quotation into a sales order (see Turn an accepted quotation into a sales order)
Create an order directly	Create a sales order (see Create a sales order)

Not here?

See Getting help (see Getting help), or type a word in **Search help**.

Getting help

Find an answer in the app first, then contact EVOZO support if you are still stuck.

Steps

1. Open **Help**. It opens on the topic for the screen you are on.
2. Type a word in **Search help**. Use the word you would use at the counter: "refund", "barcode", "VAT", "opening stock".
3. Open the topic and follow its steps. Button names in bold are exactly as they appear on screen.

4. Not found? Try the questions page for your area (below).
5. Still stuck? Contact EVOZO support at support@evozo.ph. Include your organization name, what you were doing, the error message, and a screenshot if possible. Never include your password.

Questions pages

- POS questions and answers (see POS questions and answers): till, shifts, payments.
- Inventory questions (see Inventory questions): receiving, opening stock, adjustments.
- Products FAQ (see Products FAQ): products, uploads, variants.
- Sales quotations FAQ (see Sales quotations FAQ) and Sales order questions (see Sales order questions).
- Settings FAQ (see Settings FAQ): organization name, tax and VAT.
- Sign in (see Sign in) has questions on lost access and authenticator apps.

Tips

- If a page or button is missing, you probably lack the permission. Ask an owner or admin first.
- You can download the **Download Help Guide (PDF)** from the Help window to read offline.
- Help content is not available in every environment. If the Help window says so, contact EVOZO support.

Questions

Q: Where is troubleshooting?

A: There are no separate troubleshooting pages yet. Use the questions pages above.

Q: How do I reach EVOZO support?

A: Email support@evozo.ph. Include your organization name, what you were doing, the exact error message, and a screenshot if you can. Never send your password or authenticator code. EVOZO checks that you own the organization before anything is changed on your account. See Sign in (see Sign in).

What's new

Recent changes to EVOZO, newest first.

Date	What changed	Where
3 November 2026	In the demo, **View as** now signs you in as one of eight ready-made staff users (Owner, Store manager, Cashier, Café cashier, Warehouse lead, Buyer, Estimator, Catalog manager), so each role shows exactly what that person can do. These staff users cannot be changed or removed, and they show as read-only on the IAM users screen. Your own demo login is not changed.	The demo
2 November 2026	A demo site is now available. Anyone can try EVOZO with sample data for a café and retail business. The demo is erased and rebuilt every night at 12:00 midnight (Philippine time), so changes you make in the demo are not kept.	demo.evozo.ph

Date	What changed	Where
2 November 2026	Try EVOZO as different roles. A **View as** switch lets you see EVOZO as an Owner, Store manager, Cashier, Café cashier, Warehouse lead, Buyer, Estimator or Catalog manager. A banner on every page reminds you that you are in the demo.	The demo
2 November 2026	A "Try the demo" button is now on the EVOZO front page. Fill in your name, business, contact details and consent, then the demo opens.	The EVOZO front page (evozo.ph)
2 November 2026	Your own business data is never in the demo. The demo only holds sample data.	The demo

Good to know

- For how to get into the demo, see the demo question on the Sign in page.

Troubleshoot - I cannot sign in

Use this page when sign-in is refused, you are locked out, or you reach the wrong organization.

The message you see

```
Invalid email or password
Account is temporarily locked. Try again later.
Account is disabled
You do not have access to this workspace
Authentication required
```

Why it happens

Code	Message	Why
`ERR_BAD_CREDENTIALS`	Invalid email or password	The e-mail or password does not match. The message is the same for both on purpose.
`ERR_LOCKED`	Account is temporarily locked. Try again later.	Too many failed attempts. The lock lifts by itself after a wait.
`ERR_DISABLED`	Account is disabled	An owner or admin turned your user off.
`ERR_TENANT_ACCESS`	You do not have access to this workspace	Your login is not a member of the organization you picked.
`ERR_UNAUTHENTICATED`	Authentication required	Your session ended or you are not signed in.

What to do

1. Check the e-mail and retype the password. See Sign in (see Sign in).
2. If you are locked, stop trying and wait, then sign in again. More attempts do not help.
3. If you belong to more than one organization, switch to the right one: Switch organization (see Switch organization).

4. If your account is disabled, or you are not a member, ask your owner or admin: Users and roles (see Users and roles).
5. For "Authentication required", sign in again.
6. Still stuck: Getting help (see Getting help) (contact EVOZO support).

Who can fix it

Only an owner or admin can turn a user back on or add you to the organization. Nobody else can lift a lock early. For how organizations and records fit together see How records work (see How records work) ; for settings see Settings overview (see Organization and Settings at a glance) and IAM overview (see Users and roles at a glance).

Troubleshoot - "Only an owner or admin can..." (permission denied)

Use this page when the app says only certain people can do what you tried.

The message you see

```
Only an owner or admin can view this
Only an owner or admin can manage members
Only an owner or admin can view IAM users
Only an admin can provision devices
```

The wording changes with the action. It always names who may do it.

Why it happens

The code is `ERR_FORBIDDEN` (HTTP 403). Your role does not include the permission for this action, or you are signed in to a different organization than the record belongs to. Nothing was saved.

What to do

1. Read the message: it names the role that can do the action.
2. Ask someone with that role to do it, or to change your role in Users and roles (see Users and roles).
3. Check you are in the right organization: Switch organization (see Switch organization).
4. If you were told you should have access: Getting help (see Getting help).

Who can fix it

An owner or admin of your organization changes roles and permissions. See IAM overview (see Users and roles at a glance) and Settings overview (see Organization and Settings at a glance).

Learning path: Owner and admin

A reading list for the people who set up and run the organisation.

Who this is for

Owners and admins who are setting up EVOZO or looking after it day to day.

The path

1. First-day setup (see First-day setup checklist)
2. How EVOZO is organised (see How EVOZO is organised)

3. Organisation settings (see Organization settings)
4. Profile and TIN (see Set your organization profile and TIN)
5. VAT-registered or non-VAT (see VAT registered or non-VAT)
6. Users and roles (see Users and roles)
7. Permissions by role (see Permissions by role)
8. Give or remove a role (see Give or remove a role)
9. Two-factor sign-in (see Set up two-factor sign-in)
10. Approvals inbox (see Approvals inbox)
11. Quotation and discount settings (see Quotation and discount settings)
12. Billing overview (see Billing at a glance)
13. Subscription invoice statuses (see Subscription invoice statuses)
14. Accounting overview (see Accounting and Finance at a glance)
15. What posts automatically (see What posts to the books automatically)

Checklist

- My organisation details, TIN and VAT status are set.
- Every user has the right role.
- I know where approvals arrive and who can approve.
- I know where to find billing and invoices.
- I know how to reach support: support@evozo.ph.

Learning path: Cashier

A reading list for people who run the till.

Who this is for

Cashiers who open a shift, sell, take payment and close the shift.

The path

1. POS overview (see Point of Sale at a glance)
2. Open a shift (see Open a shift)
3. Sell at the till (see Sell at the till)
4. Quick keys (see Quick keys)
5. Discounts and approvals (see Discounts and manager approvals)
6. Senior and PWD discount (see Apply the Senior Citizen / PWD discount)
7. Take payment (see Take payment)
8. Receipts and printing (see Receipts and printing)
9. Payments to resolve (see Payments to resolve (manager))
10. Refunds and returns (see Refunds and returns)
11. Set your approval PIN (see Set your approval PIN)
12. Close the shift (see Close the shift and read the shift report)
13. Till sale to shift close (see A till day from opening the shift to the cash count)

Checklist

- I can open a shift.
- I can ring up a sale and take payment.
- I know when a discount needs a supervisor.
- I can apply the Senior or PWD discount.
- I can refund an order.
- I can close my shift.

Learning path: Shift supervisor

A reading list for supervisors who approve, resolve and close out the day.

Who this is for

Shift supervisors and managers who approve discounts, fix payment problems and reconcile the day.

The path

1. POS overview (see Point of Sale at a glance)
2. Discounts and approvals (see Discounts and manager approvals)
3. Set your approval PIN (see Set your approval PIN)
4. Approvals inbox (see Approvals inbox)
5. Terminals (see Set up a till terminal)
6. The orders page (see The POS Orders page)
7. Payments to resolve (see Payments to resolve (manager))
8. Payments waiting for a shift (see Payments waiting for a shift)
9. Refunds and returns (see Refunds and returns)
10. Close the shift (see Close the shift and read the shift report)
11. Shift report figures (see What the figures on the shift report mean)
12. End-of-day reconciliation (see End-of-day cash reconciliation)
13. Trouble: discount approval (see Troubleshoot - a discount or price is refused)

Checklist

- I have set my approval PIN.
- I know where to approve requests.
- I can find and clear payments that need resolving.
- I can read the shift report.
- I can reconcile the day.

Learning path: Sales and quotations

A reading list for people who quote and sell to customers.

Who this is for

Salespeople who create quotations and turn them into sales orders.

The path

1. Sales overview (see Sales at a glance)
2. Customers and price tiers (see Customers and price tiers)
3. Create a quotation (see Create a quotation)
4. Quotation templates (see Quotation templates)
5. Quotation statuses (see Quotation statuses)
6. Revise a quotation (see Revise a quotation)
7. Send the customer link (see Send the customer link for a quotation)
8. Deposits and acknowledgement receipts (see Record a deposit and print its Acknowledgement Receipt)
9. Approvals inbox (see Approvals inbox)
10. Quotation to sales order (see Turn an accepted quotation into a sales order)
11. Sales order lifecycle (see Follow a sales order from Draft to Fulfilled)
12. Sales order statuses (see Sales order statuses)
13. Quote to cash (see From quotation to cash and delivery)

Checklist

- I can create and send a quotation.
- I know when a manager must approve it.
- I can take a deposit.
- I can see the sales order that a quotation becomes once it is accepted.

Learning path: Catalog manager

A reading list for people who maintain products and prices.

Who this is for

Catalog managers who add products, set prices and keep the catalog tidy.

The path

1. Catalog overview (see Products and the catalog at a glance)
2. Product types and behaviour (see Product types and behaviour flags)
3. Add a product (see Add a product)
4. Edit a product (see Edit a product)
5. Variants and packs (see Variants and pack units)
6. Units, packs and base unit (see Units, packs and the base unit)
7. Product categories (see Organise products into categories)

8. Price tiers and components (see Price tiers and price components)
9. Quantity breaks (see Quantity breaks)
10. Product bill of materials (see Bills of materials and kits)
11. Cutting policy (see Set a cutting policy for cut-to-size products)
12. Upload products (see Upload products)
13. Replacement cost report (see Replacement-cost report)
14. Trouble: product pricing (see Troubleshoot - product price and price tier errors)

Checklist

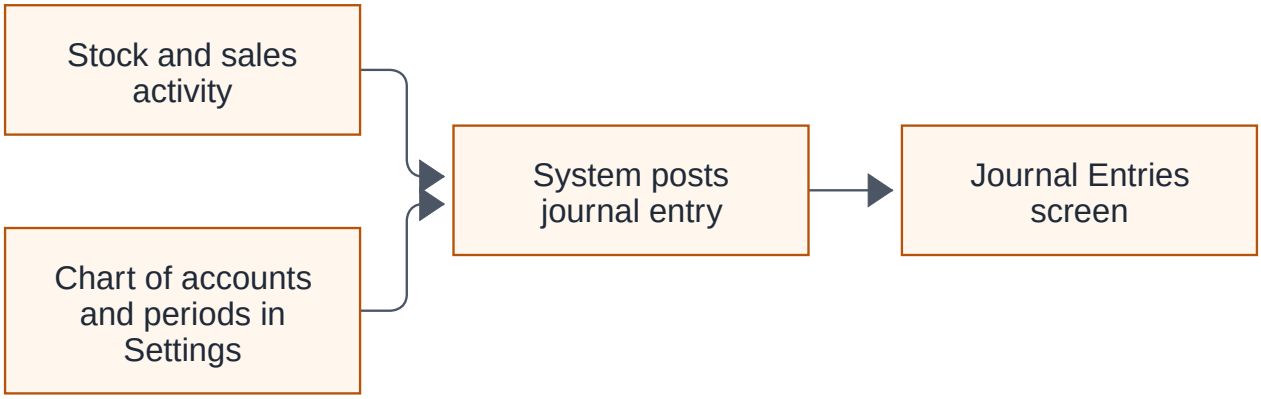
- I can add and edit a product.
- I know how variants, packs and units fit together.
- I can set prices and quantity breaks.
- I can upload many products at once.

Accounting & Finance

Accounting and Finance at a glance

PARTIALLY AVAILABLE
Accounting is a read-only view of journal entries today. You cannot post or edit entries here.

Accounting & Finance shows the journal entries that the system posted for you, so you can see what stock and sales cost, for example after a delivery of steel or a day of café sales.



Before you begin

- Your role must be able to read journal entries. The Owner, an Accounting Clerk and a Financial Controller can.
- Accounts and periods are set up in Settings. See Organization settings (see Organization settings).

Key ideas

- A **journal entry** is a record of money moving between accounts. You do not type them; they are posted from other work.
- Posted entries are an audit trail. How records work (see How records work) explains why they are not edited.
- A Financial Controller can also set which accounts each kind of stock movement posts to.

What you can do here

- Open **Journal Entries** and read what was posted.

What this module does not do yet

- The only screen is **Journal Entries**, and it is read-only.

Related

- Organization settings (see Organization settings)
- How records work (see How records work)

- What do you want to do? (see What do you want to do?)

Read your journal entries

PARTIALLY AVAILABLE
You cannot create or post a manual journal entry in EVOZO today. The Journal Entries screen is read-only.

Find and read the journal entries the system has posted, for example the cost of a day of café sales or a delivery of steel.

Before you start

- Your role needs `accounting.journal.read`. The Owner has it by default.
- You cannot type a journal entry yourself. The screen says entries are never hand-authored here. To see what creates them, read What posts automatically (see What posts to the books automatically).

Steps

1. Open **Accounting** and choose **Journal Entries**.
2. Narrow the list with **From** and **To** dates, **Source type**, or **Reference ID** (a movement, work order or sales order id). Choose **Refresh** to reload, or **Reset** to clear the filters.
3. Click a row to open it. You see each line: **Account Code**, **Account Name**, **Debit**, **Credit** and **Memo** , with the totals underneath.
4. In the **Source Reference** column, click the link to go to the document that caused the entry, when a detail screen exists for it.

Result

You can check that each entry shows **Balanced** (debits equal credits). An entry marked **Out of balance** needs a look from your accountant.

Tips

- If a yellow notice says there is no open period, new entries cannot be posted. See Open your fiscal year and periods (see Open your fiscal year and periods).
- Posted entries are not edited. See How records work (see How records work).

Questions

Q: How do I enter a manual journal entry?

A: You cannot yet. Contact support@evozo.ph if you need a correction posted.

Q: A sale or delivery has no entry. Why?

A: Some events post nothing, or are skipped when no account mapping or open period exists. See What posts automatically (see What posts to the books automatically).

Open your fiscal year and periods

Set up your fiscal year and open a month so the system can post journal entries into it.

Before you start

- To see the screen you need `settings.fiscal_periods.read`. To generate, open or close periods you need `settings.fiscal_periods.manage`. Anyone without it is refused.
- Set **Fiscal year starts in** under **Fiscal configuration** first. The year start comes from there. If it says **Not configured**, set it before generating.

Steps

1. Open **Settings** and choose **Fiscal Calendar & Periods**.
2. Under **Generate periods**, pick the **Fiscal year start date**, add a **Label (optional)** such as FY2026-2027, and choose **Generate 12 monthly periods**.
3. Under **Fiscal years**, choose **View periods** on the year.
4. Every new month starts as `future`. On the month you are working in, choose **Open**.
5. At month end, choose **Close** on that month.

Result

- An `open` period accepts new journal entries dated inside it.
- A `closed` period does not. The system refuses to post into it, and the stock or sales action still goes ahead without a journal entry. The system logs a "Journal entry skipped" warning naming the document. For example, a hardware delivery received after the month was closed is stocked but not posted.
- You can reopen a `closed` month with **Open**.

Tips

- Close a month only after every day inside it is settled. The year-level period can close only once all 12 months are closed.
- You cannot open a month under a year that is already closed.
- Keep a period open for each day you trade, or journal entries will not be recorded. The Journal Entries screen shows a no-open-period notice.

Questions

Q: Why is Close greyed out on the year?

A: Some months are still open. Close them first.

Q: Who can do this?

A: An owner or a Financial Controller. Ask your owner. Support: support@evozo.ph.

What posts to the books automatically

PARTIALLY AVAILABLE
Only stock cost, POS cost of goods and customer deposits post today. Sales revenue, VAT and cash-in-till postings are not built yet.

Know which business events create journal entries on their own, and which ones do not.

Before you start

- Each event posts only when your accountant has set its debit and credit accounts (a GL mapping) and a period is open. See Open your fiscal year and periods (see Open your fiscal year and periods).
- You read the results in **Journal Entries**. See Read your journal entries (see Read your journal entries).

Steps

Check the table, then look for the entry in **Journal Entries** under Accounting using **Source type**.

Event	Posts?	Example
Receiving stock	Yes: stock value in, per the receipt mapping	A delivery of steel bars
Adjustments and write-offs	Yes: gain or loss per the adjustment mapping	Broken tiles written off
Cycle counts	Yes, through adjustments	A recount finds 3 fewer cans
Transfers	Yes, per the transfer mapping	Stock moved between shops
Internal consumption	Only after a tenant maps it; none is set up by default	Café uses its own beans
Vendor returns	Yes, per the return mapping	Faulty parts sent back
Work orders (materials used, finished output)	Yes, source `manufacturing`	Cut and assembled gates
POS sale	Cost of goods only: debit cost, credit inventory	A bag of cement sold at the till
Cash or bank deposit on a sales order	Yes: debit cash or bank, credit Customer Deposits (a liability, not revenue)	A 30% deposit on a custom order

Not built yet:

- Sales revenue and the money received at the till.
- VAT.
- Refund or forfeit of a deposit, and applying a deposit to an invoice.

Result

A posted event shows as a balanced entry. A POS sale is never held back if its posting fails; it is logged and the sale stands.

Tips

- If a delivery or deposit is recorded but has no entry, check for a missing mapping or a closed period. The record stays; the entry is skipped.
- Ask your accountant to confirm the mappings under Settings. See Organization settings (see Organization settings).

Questions

Q: Where is my sales revenue?

A: Not posted yet. Only the cost side of a POS sale posts.

Q: A skipped entry. Can I add it by hand?

A: Not on this screen. Contact support@evozo.ph.

Audit Log

Read the audit log

See who did what, and when, across your modules, and export the entries to a spreadsheet.

Before you start

- Only an owner or an admin of your organization can open the audit log. This is decided by the owner or admin role, not by a permission you can add to a custom role. Anyone else is refused (`ERR_FORBIDDEN`).
- The log is read-only. The system writes it; nobody can edit or delete entries from the app.

What each entry shows

Column	Meaning
Timestamp	When it happened.
User	The user ID who did it.
Action	What was done, for example `record.viewed`.
Module	The module it happened in, for example `crm`.
Sub-Account	The sub-account involved, or a dash if none.
Context	Extra detail; hover to read all of it.

Changes to custom roles are also recorded with a before-and-after copy, and the role's **History** shows them. See Create a custom role (see Create a custom role).

Steps

1. Open **Audit log** (`/audit`).
2. Narrow the list with **Sub-Account ID**, **Module**, **Action**, **User**, **From** and **To**.
3. Select **Refresh** to reload, or **Clear** to reset the filters.
4. Select **Load older entries** to read further back.
5. Select **Export CSV** to download the entries shown (file name `audit_logs.csv`). The button is disabled when the list is empty.

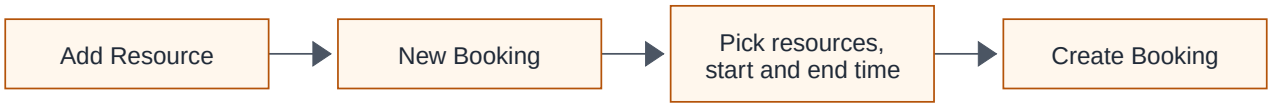
Tips

- To check a refund dispute at a café, filter by **User** and a day with **From** and **To**.
- If the list says "No audit log entries found.", loosen the filters.

Calendar & Bookings

Calendar at a glance

Calendar (Calendar & Bookings in the menu) is where you book things people share, such as a fitting room, a meeting table or a delivery van, so two bookings do not clash.



Availability

Calendar is still being built and is not open to organizations yet. If you cannot see it in the menu, that is expected. For questions, write to support@evozo.ph. See Find modules (see Find modules).

Customers see only their own bookings.

Before you begin

- Calendar is open only to the platform organization for now (see Availability).
- Create at least one resource under the **Resources** tab first. A booking needs a resource.

Key ideas

- A **resource** is something that can be booked. Each resource has a name and a type.
- A **booking** reserves one or more resources between a start time and an end time. It can carry a contact name, a contact email and notes.
- How records work (see How records work) explains drafts, statuses and why saved records are not freely edited.

What you can do here

The Calendar screen is titled **Calendar Resource Scheduling** and has the tabs **Schedule** and **Resources**.

- In **Schedule**, pick a **Date** and choose **+ New Booking**. Fill in the title, tick the resources, set the **Start Time** and **End Time**, then choose **Create Booking**.
- Create the resources first in **Resources**. Without a resource, a booking cannot be made.

The menu also lists Availability. This page does not describe it.

What this module does not do yet

- It is not open to organizations yet (see Availability).

Related

- Find modules (see Find modules)
- How records work (see How records work)
- What do you want to do? (see What do you want to do?)

Courses

Courses at a glance

Courses is where you offer lessons and a learners' community, for example short training videos for new café staff or a how-to course for your retail customers.



Availability

Courses is still being built and is not open to organizations yet. If you cannot see it in the menu, that is expected. For questions, write to support@evozo.ph. See Find modules (see Find modules).

Customers see only their own enrollments.

Before you begin

- Courses is open only to the platform organization for now (see Availability).
- You must open a course before you can enroll in it or mark a lesson complete.

Key ideas

- A **course** is made of lessons. The **Course Catalog** lists the courses.
- Someone enrolls in a course and marks each lesson complete as they go.
- The **Community Feed** is where members post and comment.
- How records work (see How records work) explains drafts, statuses and why saved records are not freely edited.

What you can do here

The screen has the tabs **Courses** and **Community**.

- In **Courses**, open a course, choose **Enroll in this course**, and use **Mark lesson complete**.
- In **Community**, write a post and choose **Post**.

What this module does not do yet

- It is not open to organizations yet (see Availability).

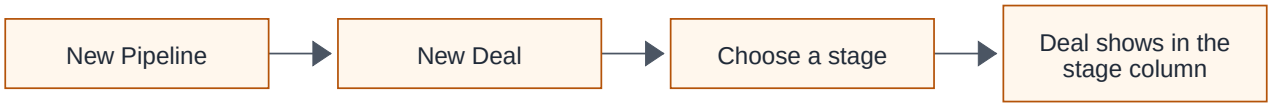
Related

- Find modules (see Find modules)
- How records work (see How records work)
- What do you want to do? (see What do you want to do?)

CRM & Web Pages

CRM at a glance

CRM (CRM & Web Pages in the menu) is where you track possible sales before they become orders, for example a café owner asking about a catering package or a contractor asking for a quote on fabricated gates.



Availability

CRM is still being built and is not open to organizations yet. If you cannot see it in the menu, that is expected. For questions, write to support@evozo.ph. See Find modules (see Find modules).

Before you begin

- CRM is open only to the platform organization for now (see Availability).
- **+ New Pipeline** and **+ New Deal** show only to people allowed to manage deals.
- A deal needs a pipeline first, because you choose its stage from that pipeline.
- Seeing contacts needs the permission to read contacts (`crm.contacts.read`). Without it, the **Contacts** entry is hidden in the CRM menu and the **Contacts** tab is hidden on the CRM dashboard. Owners, admins, CRM staff and CRM managers have it.

Key ideas

- A **pipeline** is a row of stages a deal moves through, for example from first enquiry to won.
- A **deal** is one possible sale, with a title, a value, a currency and a stage.
- A **contact** is a person you deal with.
- How records work (see How records work) explains drafts, statuses and why saved records are not freely edited.

What you can do here

The CRM screen is titled **CRM Pipeline Engine** and has the tabs **Pipelines**, **Contacts** and **Custom Fields**.

- Create a pipeline with **+ New Pipeline** and add a deal with **+ New Deal**. These buttons show only to people allowed to manage deals.
- View deals as columns, one per stage, and pick which pipeline to see from the list at the top.

The CRM menu also lists further sections: Companies, Inbox, Conversations, Forms, Pages, Surveys, Email Senders, Email Templates, Email Deliveries and Reviews. This page does not describe them.

What this module does not do yet

- It is not open to organizations yet (see Availability).

- It does not create sales orders. Orders are made in Sales.

Related

- Find modules (see Find modules)
- How records work (see How records work)
- What do you want to do? (see What do you want to do?)

Work with CRM leads

Find a lead, update their details, remove their personal data when they ask, and set how long unused leads are kept. This is for EVOZO HQ staff only.

Before you start

- The **Leads** and **CRM Settings** entries show in the CRM menu only when you are signed in to the EVOZO HQ organization. Other organizations do not see them.
- Reading leads and CRM Settings needs the permission to read contacts (`crm.contacts.read`). Owners, admins, CRM staff and CRM managers have it. Employees, cost viewers, cashiers and other roles do not.
- Changing a lead needs the permission to manage contacts (`crm.contacts.manage`). Without it you can read leads but the change buttons are not shown.

Find a lead

1. Open **Leads** in the CRM menu.
2. Type a name, email or business under **Search**, or narrow the list with **Source**, **Business type**, **Last activity from** and **Last activity to**.
3. Select **Search**. Select **Clear** to start again.
4. The table shows the name, business, business type, source and last activity of each lead. Select a name to open the lead.
5. Select **Load more** to read the next leads. The button disappears when there are no more.

Change a lead

1. Open the lead and select **Edit**.
2. Change the details. **First name** and **Email** cannot be empty.
3. Select **Save**. Saving counts as new activity, so the last activity date moves to today.

Remove personal data

Use this when a person asks to be forgotten.

1. Open the lead and select **Remove personal data**.
2. Read the box that opens. It wipes the name, email address, phone number and business name. It keeps the date of the last activity, the source and the business type. If the person is also a customer, their customer details are kept for sales records.
3. Select **Remove personal data** in the box to confirm, or **Cancel** (or press Escape) to leave the lead as it is.

Removing personal data cannot be undone, and it always ends the lead. A removed lead shows as **Removed** in the list and on its page, and it is read-only: **Edit** and **Remove personal data** are no longer shown. If a change is refused because the lead was removed, a message says so.

If the person is also a customer, the lead's personal data is removed and you see: "Personal data removed from the lead. This person is also a customer, so their customer details were kept for sales records."

Set how long leads are kept

1. Open **CRM Settings**.
2. Enter a whole number under **Lead retention (months)**, from 1 to 120. The default is 12.
3. Select **Save**.

A lead with no activity for that many months has its personal data removed automatically each night, in the same way as the manual removal above. That removal also ends the lead.

Tips

- Search by email to check whether a person is already a lead before you add them elsewhere.
- A shorter retention period means fewer old records to protect; a longer one keeps your list of past enquiries.

Questions

Q: Why can I not see Leads in the menu?

A: Leads are open to EVOZO HQ only. You also need the permission to read contacts. Ask an owner or admin if your role does not have it.

Q: Why can I not edit a lead?

A: Either the lead was removed (by a person or by the nightly removal, and a removed lead is read-only), or your role does not include the permission to manage contacts. Ask an owner or admin about the permission.

Q: I removed a lead who is also a customer. Is the customer gone?

A: No. Only the lead's personal data is removed; their customer details are kept for sales records.

CRM messaging, email, forms and reviews

These CRM screens cover customer messages, outgoing email, forms and reviews.

Availability

CRM is still being built and is open only to the platform organization for now. If you cannot see these screens in the menu, that is expected. For questions, write to support@evozo.ph. See Find modules (see Find modules).

Inbox and Conversations

Both menu entries open the same screen, titled **Omnichannel Webhooks & Unified Inbox**. It opens on the **Unified Inbox** tab, which needs permission to read contacts.

1. Narrow the list with the **All Channels** and **All Statuses** lists (Unread, Read, Archived).
2. Select a conversation to read its messages. An unread conversation is marked read when you open it.
3. Use **Mark Read** or **Archive** to change its status.
4. Type in the reply box and select **Send Reply**.

What the inbox receives today

Messages sent in from outside channels are refused unless the channel has a secret kept on the server. No screen lets you set up this secret, and none can be stored yet. So the **Unified Inbox** does not receive new messages from outside channels today. A refused message creates no conversation.

The **Outbound Webhooks** tab is the only part you can set up on this screen.

Subscriptions

This opens the same screen. Select the **Outbound Webhooks** tab, which shows only to people who may manage webhooks. A webhook subscription sends events from EVOZO to a web address you choose.

1. Select **+ Add Webhook Subscription**.
2. Enter a **Name**, a **Target URL** and the **Events** (comma separated, * for all).
3. Select **Save Subscription**.

Each subscription offers **Send Test Ping**, **Deactivate** or **Activate**, and **Delete**.

Email, Email Senders, Email Templates and Email Deliveries

All four open the screen titled **BYO-SMTP Automailer**, for people who may manage the mailer. It always opens on the **Senders** tab; switch to **Templates** or **Delivery Log** with the tabs.

- **Senders: + Add SMTP Sender** takes a Host, Port, Encryption, Username, Password, From Address and From Name, then **Save Sender**. On each saved sender, **Verify Connection** checks it. **Send Test Email** goes to the address you type, and only once the sender shows Verified.
- **Templates: + New Template** takes a Name, Subject, HTML Body and Text Body, then **Save Template**. Saved templates are listed by name and subject.
- **Delivery Log:** a table of To, Subject, Status and Sent At. Filter it by Queued, Sent, Failed or Bounced.

Forms, Pages and Surveys

All three open the same form builder. Its tabs are **Visual Builder**, **Branching Rules**, **Settings & CRM Sync** and **Interactive Preview**. The type (Standard Web Form, Landing Page Form or Interactive Survey) is set under **Form Type** in the settings tab, not by the menu entry.

1. Enter the form title and slug at the top.
2. In **Visual Builder**, select items in the **Element Palette** to add fields, select a field to edit it in **Field Inspector**, and use the arrows to reorder or the cross to delete.
3. In **Branching Rules**, select **+ Add New Conditional Rule** to show or hide fields depending on an answer.
4. In the settings tab, choose whether submissions create or update CRM contacts, a CRM tag, the submit button text and the success message.
5. Select **Save Draft** or **Publish**. These two buttons show only to people allowed to manage the builder.

Reviews

The screen is titled **Reputation & Reviews**. It shows totals (Total Reviews, Avg Rating, Positive, Negative) and a list of reviews you can filter by status (New, Responded, Flagged) and sentiment. Select a review to open it in the response editor beside the list. **Flag** marks a review, and shows only to people allowed to respond to inbox items.

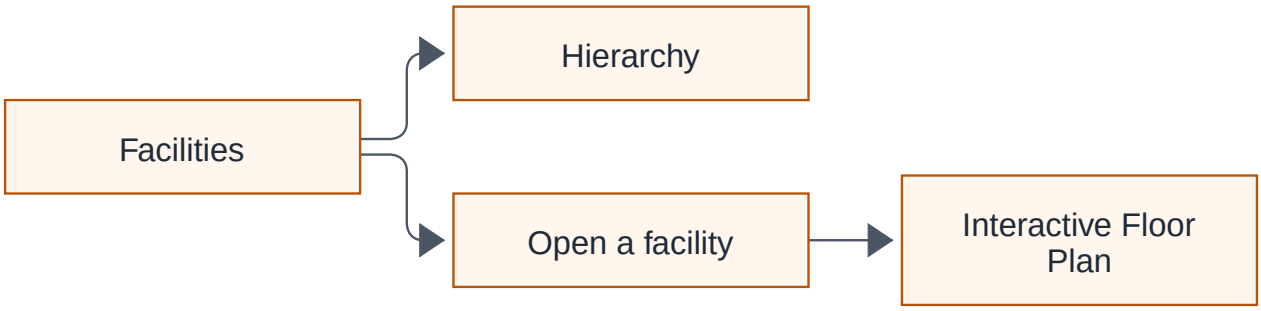
Related

- CRM at a glance (see CRM at a glance)
- Find modules (see Find modules)

Facilities

Facilities at a glance

Facilities is where you keep your sites, for example a fabrication plant, a café branch, or a shop with a back room.



Availability

Facilities is not tied to a module licence. It shows in the menu to everyone whose role allows it. How many of your sites can hold stock depends on your plan, see Stock locations and your plan (see Stock locations and your plan). If you cannot see it, write to support@evozo.ph.

Before you begin

- Adding or changing a site needs the permission to manage sites. Without it you can look but not edit.

Key ideas

- A **facility** is a site of record: a warehouse, plant, store or office, with its address.
- Facilities can sit under one another, shown on the **Hierarchy** screen as sub-sites.
- Facilities owns the site and building. Inventory only refers to the site, and places stock in it. See Inventory at a glance (see Inventory at a glance).
- A stock location is a facility that holds stock. Offices, buildings, floors and rooms never count toward your limit.
- How records work (see How records work) explains drafts, statuses and why saved records are not freely edited.

What you can do here

The Facilities menu has two screens: **Facilities** and **Hierarchy**.

- View your sites in **Facilities**, and add or edit them if your role allows.
- Open a facility to see its details and its **Interactive Floor Plan**.
- See how sites sit under each other in **Hierarchy**.

What this module does not do yet

- It does not move or count stock. That is in Inventory.

Related

- Stock locations and your plan (see Stock locations and your plan)
- Inventory at a glance (see Inventory at a glance)
- How records work (see How records work)
- Find modules (see Find modules)

Stock locations and your plan

A stock location is a place that holds stock, such as a warehouse, a store or a plant. Offices, buildings, floors and rooms never count. This page explains how many stock locations your plan allows and what happens when you have more.

Before you start

- Open **Facilities** in the menu to see and add your locations.

How many you can have

1. Basic inventory comes with Sales. You get one stock location for each branch you pay for.
2. The Warehouse module removes the limit. It also adds the bin layout screens, **Stock by Size**, **Count by Size**, **Fulfilment**, **Returns** (vendor returns) and **Replenishment**. Holding and releasing a lot, bin and layout changes, and the **Expiry & Aging**, **Turnover & ABC** and **Lot/Serial Trace** reports also come with the Warehouse module.
3. When you try to add or turn on one location too many, the page shows a message and a link to **See plans & billing**. Nothing is created.

If you have more locations than your plan

This can happen after you remove the Warehouse module or some branches. Nothing is deleted. Your default location and then your oldest locations stay normal, up to your limit. The others become read-only.

- Stock cannot go into a read-only location. This covers receiving, opening stock, transfers in, stock added by an adjustment, and finished goods from a work order in Manufacturing. The message reads: "This location is over your plan's limit. Move its stock or upgrade to sell from it."
- Stock can still go out by transfer or write-off, so you can move it. Sales at the POS from this location are refused with the same message.
- A customer refund still puts the goods back into the location they were sold from.
- To get a location back, add the Warehouse module or more branches, or move its stock to a normal location.

Good to know

- The message appears on whichever screen you were using when the problem happened.
- Organisations that joined before the US dollar price list took effect keep all their locations and features.
- For prices, extras and billing, see Plans, prices and extras (see Plans, prices and extras).

See a DinksyRush club's bookings

Read the court bookings of a DinksyRush club from EVOZO: who booked which court, when, and what is recorded as paid.

Before you start

- This page is only for a DinksyRush club. Open the organization menu in the header and pick the club; it carries a **DinksyRush club** label. An organization that is not a club does not have **Club bookings** in the menu.
- Open **Facilities**, then **Club bookings**.
- Any member of the club's staff can read the list. The club's plan must include court bookings; if it does not, the page says so.
- The list is read-only. Confirming, checking in, cancelling and recording payments are front-desk work and are done in the DinksyRush club app. EVOZO refuses them for an EVOZO sign-in.
- Facilities, venues and courts are different: you can still set those up from EVOZO. See Sites and buildings (see Sites, buildings and sub-sites).

Steps

1. Under **From** and **To**, choose the first and last day. The page opens on today and the next six days. You can look at up to 31 days at a time.
2. Under **Court**, keep **All courts** or choose one court.
3. Select **Show bookings**.
4. Read the table: date and time (in the club's time zone), court, who booked, status, payment, price and the amount **Recorded paid**.

Tips

- A status of "No show" means the player did not arrive and the court was freed.
- **Recorded paid** is the money recorded against the booking, after any refund. It is not a bank statement.
- For totals over a longer period, use Booking reports (see Booking reports for a DinksyRush club).

Questions

Q: Why is there no button to cancel a booking?

A: Bookings are changed at the front desk in the DinksyRush club app. This page only reads them.

Q: I see "This organization is not a DinksyRush club".

A: You have a different organization selected. Switch organization in the header.

Q: I see "Some bookings could not be counted; narrow the range".

A: One day has more bookings than EVOZO can read at once. Choose fewer days.

Q: I see "Too many requests".

A: Wait the number of seconds the message gives, then select **Show bookings** again.

Sites, buildings and sub-sites

Facilities is where you record the places your business runs from: warehouses, stores, plants, offices and the buildings, floors and rooms inside them. A hardware chain might list a head office, two shops and a warehouse. A café group might list each café and its commissary kitchen. Facilities has no licence gate, so every business can use it.

Each facility has a name, a type, a code, an address, a status and a parent. Inventory bins, zones and stock belong to Inventory and only point at these facilities.

Before you start

- Open **Facilities** in the menu. Anyone can look. Adding, changing and deleting need permission to manage sites; without it the **+ New Facility** button and the edit buttons are hidden.

Add a facility

1. On **Facilities & Locations**, click **+ New Facility**.
2. Enter the **Facility Name** and choose the classification (warehouse, store, building, floor, room and so on).
3. Choose a parent site, or leave it as none for a top-level site. The page offers to nest the new site under an existing campus, building or warehouse.
4. Check the **Facility Code**. It is filled in from the type and the parent, and you can type your own.
5. Add the location and, if you want, the measurements, then save. You land on the new facility's page.

Find and open a facility

- The **All Facilities** table shows **Name**, **Type**, **Code**, **Parent**, **Location / Address**, **Operating entity** and **Status**.
- Search by name, code, address or operating entity.
- Click a row to open that facility. Its page has four tabs: **Overview & Profile**, **Interactive Floor Plan** (see The floor plan (see The floor plan)), **Sub-Facilities** and **Operating Entity Roles**.

Parents and sub-sites

A facility can sit under a parent. A building holds floors, a floor holds rooms, a campus holds buildings.

1. Open the parent facility.
2. Click **+ Add Sub-Facility / Room**, or open the **Sub-Facilities** tab to see everything directly under it.
3. Enter the **Space Name**, choose the type and check the **Space Code**, then save.

A sub-site uses its parent's address unless you tick **Use a different address from the parent**. The table shows "Inherited from" and the parent's name when it does.

To move a facility, change the parent on its **Overview & Profile** tab and click **Save Facility Profile**.

See the whole tree

Click **View hierarchy** on **Facilities & Locations**. **Facility Hierarchy** shows every site as a card nested under its parent.

- **Expand All** and **Collapse All** open or close every branch.
- A site with nothing under it is marked **Terminal site**. Inactive sites and the default site carry a tag.
- Click a card to open its details and edit it in the side panel.

Operating entity

Each facility can be tied to the legal entity that owns, leases or uses it. On the **Operating Entity Roles** tab, choose the **Legal Entity**, the **Role** and a **From Date**. The tab keeps a history of earlier roles.

Delete a facility

Use the delete button on the facility's page and confirm. The default site cannot be deleted. If a facility has sub-sites or linked transactions, the page says it could not be deleted.

Good to know

- How many locations that hold stock your plan allows is explained in Stock locations and your plan (see Stock locations and your plan). Offices, buildings, floors and rooms never count towards it.

Booking reports for a DinksyRush club

See a summary of the club's bookings over the dates you choose: bookings per day and per court, the revenue recorded, no-shows and cancellations.

Before you start

- This page is only for a DinksyRush club. Open **Facilities**, then **Booking reports**.
- The report is built from the club's bookings. It reads them and changes nothing.

Steps

1. Under **From** and **To**, choose the first and last day. The page opens on the last 30 days. You can choose up to 92 days.
2. Select **Show report**.
3. Read the totals at the top: **Bookings**, **Revenue recorded**, **No-shows** and **Cancellations**.
4. Read **Per day** and **Per court** below for the detail.

What the numbers mean

Number	How it is counted
Bookings	Every booking that was not cancelled or expired, no-shows included.
Revenue recorded	Money recorded on bookings in this range, after refunds. Includes money kept on cancelled bookings.
No-shows	Bookings marked as no-show.
Cancellations	Bookings that were cancelled.

Days follow the club's time zone. A booking is counted once, on the day it starts.

Tips

- If the report looks too small, check the dates. A range longer than 92 days is refused.
- Money recorded at the front desk after you opened the page shows when you select **Show report** again.

Questions

Q: Why does revenue not match my bank?

A: Revenue recorded is what the club recorded against bookings in the range, after refunds. Payouts and fees are separate.

Q: What does "Some bookings could not be counted; narrow the range" mean?

A: A single day has more bookings than EVOZO can read at once. Choose a shorter range and compare the days.

The floor plan

The **Interactive Floor Plan** is a drawing of a facility. You draw the walls of a building or floor and place rooms and spaces inside them. A hardware warehouse, a café with a back kitchen and a shop floor can each have one.

Two places share the work:

- **Facilities** owns the building: its outline, its floors and its rooms. That is covered here.
- **Inventory** places the working layer on a warehouse: zones such as cold or staging areas, and storage fixtures such as racks and shelves. These are set on the warehouse's own page in Inventory, not here: open the warehouse and use the tabs **2D Warehouse Floor Plan**, **Storage Hierarchy & Fixtures** and **Stock Batches & Bins**, then **Edit Layout** and **Save Layout**. See Warehouses, storage fixtures and zones (see Warehouses, storage fixtures and zones).

Before you start

- Open **Facilities**, click a facility, then open the **Interactive Floor Plan** tab.
- Anyone who can open the facility can look at the plan. Changing it needs permission to manage sites; without it **Edit Spatial Layout** and the add buttons are hidden.

Look around

1. Use the **+** and **-** buttons to zoom. The percentage resets zoom and position. **Fit** zooms to this facility's outline.
2. Drag the plan to move it. Middle-click and drag, or hold Space and drag, also moves it.
3. Click a room to see its type, parent and status.

Floors of a building

For a building, office, headquarters or campus the plan has a **LEVELS** list on the left, with the highest floor first.

1. Click a floor to draw on it.
2. Click **Building Footprint** to edit the outline that new floors start from.
3. Click **+** next to **LEVELS** to add a floor. Enter the **Floor Name** and **Floor Code** and click **Add Floor**. A new floor starts as a copy of the building's saved outline.
4. Under **Guides**, switch the dashed outlines of the **Building**, **Floor Above** and **Floor Below** on or off to line floors up. A guide can only be shown once that outline has been saved.

Edit the layout

1. Click **Edit Spatial Layout**.
2. Drag a room to move it. A room stays inside the floor outline. Use the handles on a selected room to resize it.
3. Click **+ Place Room / Space** to add a room. Enter the **Space Name** and **Space Code**, choose its type and save. It is placed in the first free spot.
4. **Snap** keeps moves on a grid. Choose the **Grid step**, or hold Alt while dragging to place freely.
5. Click **Save Spatial Layout** to keep your changes, or **Cancel** to go back to the last saved layout.

Draw the outline

1. In edit mode, click **Floor Outline**.
2. Add a shape with **Rectangle**, **Square**, **Circle**, **Oblong**, **Triangle**, **Pentagon** or **Polygon**. For a polygon set **Sides** from 3 to 12.
3. Select **Pointer** to move or resize a shape. **Drag Points** lets you move each corner; click an edge to add a corner and right-click a corner to remove it. **Reset Shape** puts a shape back to its original form.
4. **Main Perimeter** adds a rectangle around all other shapes.
5. **Remove Slab** deletes the selected shape. A floor always keeps at least one.
6. Click **Done Perimeter**, then **Save Spatial Layout**.

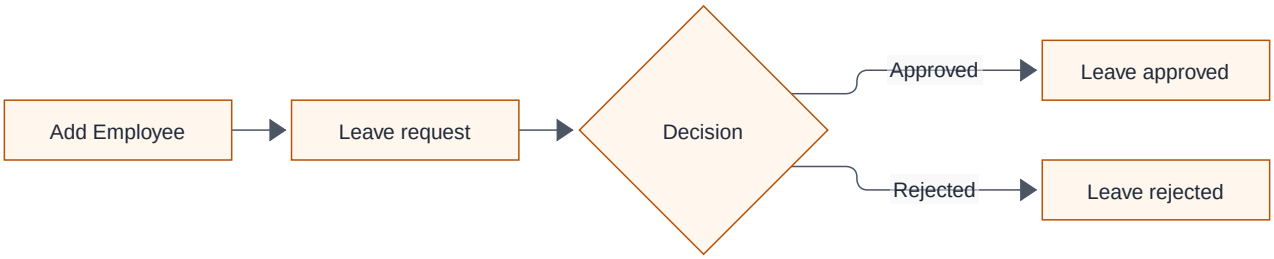
Good to know

- Switching floors or adding a floor with unsaved changes is blocked until you save or cancel. Changing tab leaves edit mode and drops unsaved changes.
- If any part of the save fails, your edits stay open so you can try again.
- To add rooms without drawing, use the **Sub-Facilities** tab. See Sites, buildings and sub-sites (see Sites, buildings and sub-sites).

HRM & Payroll

HR at a glance

HR (HRM & Payroll in the menu) is where you keep your staff records, leave requests and payroll, for example the welders in a fabrication shop or the baristas of a café.



Availability

HRM is still being built and is not open to organizations yet. It is open only to the platform organization for now. If you cannot see it in the menu, that is expected. For questions, write to support@evozo.ph. See Find modules (see Find modules).

Before you begin

- HRM is open only to the platform organization for now (see Availability).
- Staff records, leave and payroll are only for the Owner, an Administrator and the HR roles.
- Salary and pay frequency fields show only to people allowed to run payroll.

Key ideas

- An **employee** record holds the person's code, name, email, employment status (Full Time, Part Time, Contract or Probationary) and TIN.
- A **leave request** is a staff member's request for time off, which is approved or rejected.
- A **payroll run** pays staff for a period. Each person then has a **payslip**.
- How records work (see How records work) explains drafts, statuses and why saved records are not freely edited.

What you can do here

The HR screen is titled **HRM & Localized Payroll** and has the tabs **Employees**, **Leave Requests** and **Payroll & Payslips**.

- Add a person with **+ Add Employee**.
- Review leave in **Leave Requests**.
- Open payroll and payslips in **Payroll & Payslips**, if your role allows it.

What this module does not do yet

- It is not open to organizations yet (see Availability).

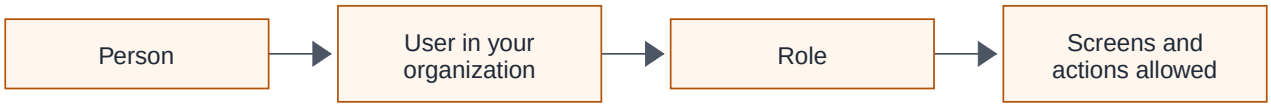
Related

- Find modules (see Find modules)
- How records work (see How records work)
- What do you want to do? (see What do you want to do?)

Identity & Access

Users and roles at a glance

Identity & Access decides who can sign in to your organization and what each person may do, for example giving a new cashier the till but not the cost reports.



Before you begin

- You need permission to read members. Owners and administrators manage users; some role changes are Owner-only.

Key ideas

- A **role** is a set of permissions. The built-in core roles are Owner, Administrator and Employee; others are tied to a module, such as POS Cashier, Sales Representative or Catalog Manager.
- A person may hold more than one role. A manager role also holds what the role below it holds.
- Some roles can only be given by the Owner, for example Payments Administrator and Cost & Margin Viewer.
- Hiding a screen is not the only protection: the system checks the role on every action.

What you can do here

The menu has **Account**, **Users**, **Roles**, **Devices** and **OAuth Clients**.

- Add users and change their roles in **Users**.
- Read what each role allows in **Roles**.
- Review devices and OAuth clients.

What this module does not do yet

- An Invitations screen is not in the menu yet.
- Inviting a person is done from the Users screen, not from a separate Invitations screen.

Related

- Users and roles (see Users and roles)
- How EVOZO is organised (see How EVOZO is organised)
- First day setup (see First-day setup checklist)
- Getting help (see Getting help)

Users and roles

Create IAM users, invite members and change their roles in Identity & Access.

Before you start

- Viewing members needs iam.members.read. Changing them needs iam.members.manage. Managing admins needs iam.members.manage_admins.

Steps

1. Open **IAM users**. Other tabs are **Members** and **Owners**.
2. To add a sign-in user, select **New IAM user**, then **Create IAM user**.
3. To add a person by invitation, select **Invite member**, then **Send invite**.
4. For a pending invite, select **Resend** or **Revoke**.
5. To change access, select **Edit roles** on a member.
6. To take someone out, select **Remove from organization**.

Tips

- Give people only the roles they need. See the Roles chapter.

Create a custom role

Build a role that fits your shop, for example a "Counter lead" for a hardware store, and decide exactly which permissions it carries.

Before you start

- You need `iam.roles.manage`. Administrators and owners have it. Without it, the **Roles** page is read-only.
- A custom role belongs to your organization only.
- You can only tick permissions you hold yourself. Owners are the exception: they can tick any permission that is allowed on a custom role.
- Some permissions can never be put on a custom role, for anyone, owners included: owner-only permissions (such as `tenant.billing` and `tenant.modules.manage`), `iam.roles.manage`, `iam.members.manage`, `iam.members.manage_admins`, every `iam.roles.grant.*` permission, and the party records permissions (**View party records (customers, vendors, employees)**, `party.records.read`, and **Manage party records**, `party.records.manage`). These last two show greyed out in the editor with "Cannot be given". Only owners and admins hold them.
- Include `workspace.access`. Without it nobody holding the role can open the workspace, and the editor shows a warning.

Steps

1. Open **Roles** (`/iam/roles`) and select **Add Custom Role**.
2. Under **Start from**, keep **A blank role**, or pick a platform role marked "Duplicate ..." to copy it. A copy takes the role's permissions, including inherited ones. Anything you cannot give is left out, and the list of what was left out is shown after saving.

3. Type a **Name** and, if you like, a **Description**.
4. Under **Permissions**, use **Search permissions** and tick what the role needs, for example the sales and inventory permissions for a counter lead. A role needs at least one permission.
5. Select **Create role**.
6. To change it later, pick the role (marked **Custom**) and select **Edit**, then **Save changes**. Use **History** to see earlier versions and **Archive** to retire it.
7. To give the role to a person, see Give or remove a role (see Give or remove a role).

Tips

- A permission you cannot give is greyed out with a reason. If a role you opened already carries one, the editor says "Untick it to save."
- If someone else saved the role first, the editor shows "Your changes were not saved." Select **Reload role** and redo your change.
- The system refuses a save with `ERR_PERMISSION_NOT_HELD` (you tried to include a permission you do not hold) or `ERR_PERMISSION_NOT_DELEGABLE` (the permission can never be on a custom role). Untick the permissions listed and save again.

Front desk and claims. The permission **Issue a claim code or link for a walk-in** (`people.claim.issue`) lets staff give a walk-in a one-time 8-character code (valid 48 hours, shown once) or email them a link (valid 7 days), so the player can claim their record. Owners and admins hold it, and you can tick it on a custom role such as "Front desk". The staff member who issued a claim cannot redeem it themselves. DinksyRush clubs use this; the screen to issue claims is not built yet, so for EVOZO businesses the permission has no effect today.

Questions

Q: Why is there no Add Custom Role button?

A: You do not hold `iam.roles.manage`. Ask an owner or administrator, or write to support@evozo.ph.

Q: Can I give a custom role to myself?

A: Only an owner can give a role to themselves. See Give or remove a role (see Give or remove a role).

Give or remove a role

Change what a person can do by giving them a role or taking one away, for example making a café team member a cashier lead.

Before you start

- You need `iam.members.manage`, and the rules below must allow the role you pick.
- The person must already have an EVOZO account in your organization. If not, send an invitation instead (see Users and roles (see Users and roles)).

Who may give which role

Role	Who may give or remove it
Any platform role	An owner.
Owner or Administrator	Only an owner.

Role	Who may give or remove it
Other platform role	Someone who holds `iam.members.manage` and that role's own grant permission (`iam.roles.grant.` followed by the role key).
Custom role	An owner, or someone who holds `iam.members.manage` and every permission the role carries. The role must be active.

- Nobody except an owner can give a role to themselves (`ERR_SELF_GRANT`).
- A role of a module that is switched off cannot be given (`ERR_ROLE_NOT_ASSIGNABLE`).
- Removing a role follows the same rule as giving it. A refusal reads `ERR_GRANT_DENIED`.
- You cannot remove the last active owner (`ERR_LAST_OWNER`).

Steps

1. Open **IAM users** (`/iam/users`) and select the person.
2. Select **Edit roles**. The dialog lists only roles you may give; if none, it says "There is no other role you can give here."
3. Add a role in the picker, or remove one you no longer want them to hold.
4. Select **Done**.

Tips

- The **Roles** page only shows the catalog; assigning happens here.
- Give people only the roles they need. A new hire at a fabrication counter rarely needs more than one.

Questions

Q: Why is Edit roles missing?

A: You may not change that person's roles. Ask an owner. If you think this is wrong, write to support@evozo.ph.

Set up two-factor sign-in

Add a six-digit code from an authenticator app to your IAM sign-in, so a stolen password alone cannot open your account.

Before you start

- Install an authenticator app (Google Authenticator, 1Password, Authy or any app that supports time-based codes).
- This applies to the IAM user you are signed in as. An owner or admin who signs in with an email address manages two-factor separately.

Steps

1. Open your IAM account page (`/iam/account`) and find **Your two-factor authentication**.
2. Select **Set up two-factor authentication**.
3. Under **Scan this code**, scan the QR code with your app. If it cannot be drawn, use **Or enter the setup key**: select **Reveal** or **Copy**, and type the key into the app.

4. Under **Confirm with a generated code**, type the six-digit code your app shows.
5. Select **Enable two-factor**. Two-factor stays off until a code is accepted.
6. Select **Done**.

From then on, after your password the sign-in screen says "Enter the 6-digit code from your authenticator app to finish signing in." Type the code and select **Verify and sign in**. Codes change every 30 seconds or so; the setup dialog shows the digits and period it uses.

If you lose your phone

An owner or admin can open **IAM users**, select you and use **Remove two-factor**. The page shows **Two-factor** as **Enabled** or **Not enrolled**. An admin cannot remove two-factor for a user who holds a role the admin is not allowed to give, such as an owner. Then set it up again with the steps above.

Tips

- Starting again on an account that already has two-factor is refused (`ERR_MFA_ALREADY_ENABLED`).
- If the dialog shows "Try again", the enrolment could not start; select it to retry.

Register, replace and revoke devices

Register a device, such as a front-counter till, replace one that is lost or broken, set how each till behaves, and cut a device off when it is retired.

Before you start

- You need `iam.devices.manage`. Administrators and owners have it. Without it, the device list, the settings and every action are refused.
- Have the device ready to scan a QR code.

Device types

The **Device type** list in **Add device** shows these types:

- **OMS Till**: available now.
- **OMS Queue**, **Warehouse Control** and **Facility Management Control**: shown as "(coming soon)" and cannot be selected yet.

The device list has a **Filter by device type** menu (**All device types** by default) next to **Filter by device name**.

Add a till

1. Open **Devices** (`/iam/devices`) and select **Add device**.
2. Leave **Device type** on **OMS Till** and type a **Device Name**, for example "Front Register 1".
3. Under **New till or replacement?**, choose one:
    - **New till**: adds another till. The hint shows how many tills are in use, for example "2 of 3 tills in use". This option is greyed out when you are at your plan's till limit. The reason is shown with a **Buy an extra till** link to billing.
    - **Replacement of an existing till**: see Replace a till, below.
4. Pick a **Branch / stock location**, or leave **Default branch**.

5. Select **Generate QR Code**.
6. Scan the QR code in the app on the device, or tap **Enter code instead** in the app and type the pairing code shown under the QR code (for example `K7MQ-2XHD`; use **Copy** to read it back). The QR code and the pairing code last 5 minutes and work once; using one uses up the other. Select **Done** when finished.
7. The device appears in the list as **Active**, with its type and till code.

Replace a till

Use this when a device is lost, broken or being swapped out.

1. In **Add device**, choose **Replacement of an existing till**, then pick the till from the **Active tills** list. Each row shows the till code and name, the device, branch and when it was last used.
2. A till with an open shift shows "Close the open shift on T01 first." (with its own code). Close that shift on the till, then pick it again.
3. If the old device still has sales that have not synced, a warning shows how many. Let the device sync if you can. If it is lost or broken, tick **This device is lost or broken**. Only an owner or administrator can confirm this.
4. Select **Generate QR Code** and scan it on the new device, or type its pairing code there.

When the new device is scanned:

- The old till becomes **Retired**. It keeps its sales and shift history.
- The old device is signed out (its status becomes **Revoked**).
- The new till gets a new terminal code and a fresh receipt series. The old receipt prefix is not copied.
- The branch and the EVOZO-managed settings carry over from the old till. The new till keeps the old name unless you type another **Device Name**.

Settings tab

Select a till in the list, then open **Settings**. The tab appears for OMS Tills only. **Details** shows the type, till, app version, last sync, device ID, status and the printer and paper width last reported.

Managed by EVOZO

You set these here. The device pulls them and shows them read-only. It keeps the last copy for offline use.

- **Branch / stock location**
- **Terminal code**: cannot change once the till has issued a receipt.
- **Receipt series prefix**
- **Receipt copies**
- **Sync every (seconds)**
- **Print the receipt automatically**
- **Receipt header** and **Receipt footer**: set here, they override the organisation's. Leave them blank to use the organisation's.
- **Allowed payment methods**: **Cash**, **Card (manual)**, **E-wallet / QR**, **Bank transfer**.
- **Quick-key menu**: quick key ids, comma separated.

Select **Save settings**, or **Discard changes**. Both are disabled until you change something.

Reported by the device

Set on the device only, and shown here read-only with the time it was last reported (or "never"): **Printer connection**, **Printer**, **Paper width**, **Cash drawer kick**, **Scanner mode**, **Screen**, **Last test print** and **Sales not yet synced**.

Revoke a device

1. Select the device in the list.
2. Select **Revoke device**. The status changes to **Revoked**. The button is disabled for a device that is already revoked.

Retired tills

- A retired till does not count toward your till limit. Only active tills count.
- Its history is kept.
- Terminal codes are never reused, so a new till never takes a retired till's code.
- A retired till cannot be edited or used again.

Questions

Q: The QR code expired or was already used. What now?

A: Select **Add device** again and generate a new code.

Q: "Your plan includes N tills..." or New till is greyed out.

A: You are at your plan's till limit. Select **Buy an extra till**, upgrade, or replace an existing till instead.

Q: "Close the open shift on T01 first."

A: A shift is open on that till. Close it on the till, then try again.

Q: "The device on T01 has N sale(s) not synced yet."

A: The old device holds sales the server has not received. Let it sync. If it is lost or broken, tick **This device is lost or broken** (owner or administrator only).

Q: "This QR code is for a ... device, not a ... device."

A: The QR code was made for a different device type than the app you scanned it with. Generate a code for the right type.

Q: I cannot change the Terminal code.

A: The till has already issued a receipt, so its code is locked. A code that another till (retired ones included) uses is also refused.

Q: "... devices are not available yet."

A: That device type is listed as coming soon. Only **OMS Till** can be added now.

Q: "Only an owner or admin can confirm a lost or broken device."

A: Ask an owner or administrator to tick **This device is lost or broken**.

See also

- What a device type and its settings mean for selling: OMS Till at a glance (see The OMS Till app) and OMS Till reports at a glance (see OMS Till reports at a glance).
- The price rounding step that applies to the prices a till charges is an organisation setting: see Quotation and discount settings (see Quotation and discount settings).

Connect another app with an OAuth client

An OAuth client lets another app, such as a partner portal, sign people in through your organization's EVOZO account. Each client has a name, a type, and lists of web addresses the app is allowed to use.

Before you begin

- The Identity and access area opens for people with the member-viewing permission, and for owners and admins.
- Managing the clients of your organization needs the OAuth client permission on one of your roles. Owners and admins of the organization are allowed. Only platform staff can manage the platform's own client.

Create a client

1. Open **OAuth Clients**.
2. Select **+ New client**.
3. Enter the **Client name**.
4. Choose the **Client type** (pkce or public).
5. Optionally enter **Initial redirect URIs**, one per line.
6. Select **Create client**.

The list shows each client's Name, Client ID, Type, Status, Redirect URIs and Verified domains. Select **Manage** to open one.

Change a client

1. On the client screen, edit **Client name**, **Client type** or **Status** (active or disabled).
2. Under **Redirect URIs**, **Allowed origins** and **Post-logout redirect URIs**, type an address and select **Add**, or select **x** beside one to remove it.
3. Select **Save changes**. **Unsaved changes** shows until you do.

Add a custom domain

1. Under **Custom domains**, enter the domain and select **Add domain**.
2. Select **Setup** beside it. It shows a DNS record and a file address, either of which proves ownership.
3. Choose the method and select **Verify now**.

A domain can be used for redirect addresses only after it shows **Verified**. **Remove** deletes a domain.

Delete a client

1. Select **Delete client** under the **Delete client** heading.
2. Select **Yes, delete**.

Any app signing in through that client stops working at once. A client marked **Platform client — protected** cannot be deleted.

What you cannot do here

There is no option to view, rotate or revoke a client secret.

Related

- Identity and access at a glance (see Users and roles at a glance)
- Users and roles (see Users and roles)

Permissions by role

This page shows what each built-in role can do. A v means the role holds the permission.

Sales

What you can do	Permission	owner	admin	sales_representative	sales_manager
Make and edit sales orders	`sales.orders.create`, `sales.orders.update`	v	v	v	v
Make quotations	`sales.quotations.create`	v	v	v	v
Keep the customers	`sales.customers.manage`	v	v	v	v
Type a discount or a price below the catalogue	`sales.discounts.discretionary`	v	v	v	v
Take a customer's deposit on an order	`sales.deposits.record`	v	v	v	v
See deposits held	`sales.deposits.view`	v	v	v	v
Approve quotations	`sales.quotations.approve`	v	v		v
Cancel sales orders	`sales.orders.cancel`	v	v		v
Change a customer's price tier	`sales.customers.tier_manage`	v	v		v
Approve discounts up to the manager ceiling	`sales.discounts.manager`	v	v		v
Approve discounts above the manager ceiling	`sales.discounts.executive`	v	v		

What you can do	Permission	owner	admin	sales_representative	sales_manager
Start production before the deposit is in	`sales.deposits.override_hold`	v	v		v

POS (till)

What you can do	Permission	owner	admin	pos_cashier	pos_supervisor
Ring up orders	`pos.orders.create`	v	v	v	v
Refund and return	`pos.returns.create`	v	v	v	v
Open a shift	`pos.shifts.open`	v	v	v	v
Close your shift	`pos.shifts.close`	v	v	v	v
Type a discount or price override at the till	`sales.discounts.discretionary`	v	v	v	v
Set up terminals	`pos.terminals.manage`	v	v		v
Set up quick keys	`pos.quick_keys.manage`	v	v		v
Close a shift another cashier left open	`pos.shifts.manage`	v	v		v
Approve discounts up to the manager ceiling	`sales.discounts.manager`	v	v		v
Approve discounts above the manager ceiling	`sales.discounts.executive`	v	v		

Catalog

What you can do	Permission	owner	admin	catalog_staff	catalog_manager	cost_viewer
Add products	`catalog.products.create`	v	v	v	v	
Change products	`catalog.products.update`	v	v	v	v	
Archive products	`catalog.products.delete`	v	v		v	
Import products	`catalog.products.import`	v	v		v	
Change recipes	`catalog.recipes.manage`	v	v		v	

What you can do	Permission	owner	admin	catalog_staff	catalog_manager	cost_viewer
Change product types	`catalog.types.manage`	v	v		v	
Change price lists	`catalog.pricing.manage`	v	v		v	
See what stock cost and what it earns	`catalog.costs.read`	v				v

Inventory

What you can do	Permission	owner	admin	warehouse_operator	warehouse_manager	cost_viewer
Receive stock	`inventory.receiving.execute`	v	v	v	v	
Move stock between places	`inventory.transfers.execute`	v	v	v	v	
Count stock	`inventory.cycle_counts.execute`	v	v	v	v	
Pick stock for orders	`inventory.fulfilment.execute`	v	v	v	v	
Ask for an adjustment or write-off	`inventory.adjustments.create`	v	v	v	v	
See the cutting queue	`inventory.cuts.read`	v	v	v	v	
Record cuts	`inventory.cuts.record`	v	v	v	v	
Approve and post adjustments	`inventory.adjustments.approve`	v	v		v	
Handle vendor returns	`inventory.returns.manage`	v	v		v	

What you can do	Permission	owner	admin	warehouse_operator	warehouse_manager	cost_viewer
Set up warehouses	`inventory.warehouses.manage`	v	v		v	
Upload opening stock	`inventory.opening_stock.import`	v	v		v	
See what stock is worth at cost (valuation)	`inventory.valuation.read`	v				v

Procurement

What you can do	Permission	owner	admin	procurement_officer	procurement_manager	procurement_controller
Keep vendors	`procurement.vendors.manage`	v	v	v	v	
Send requests for quotation	`procurement.rfqs.manage`	v	v	v	v	
Make purchase orders	`procurement.orders.create`	v	v	v	v	
Receive goods	`procurement.grns.execute`	v	v	v	v	
Approve purchase orders	`procurement.orders.approve`	v	v		v	

What you can do	Permission	owner	admin	procurement_officer	procurement_manager	procurement_controller
Enter a received cost different from the purchase order	`procurement.grns.cost`	v	v			
Approve a received cost that differs from the purchase order	`procurement.grns.approve`	v	v			
Set how far a received cost may differ	`procurement.grns.tolerance`	v				v

The cash purchase permissions are held by two smaller roles:

What you can do	Permission	owner	admin	purchasing_staff	purchase_confirmer
Record a cash purchase (no purchase order)	`procurement.cash_purchases.create`	v	v	v	
Confirm or reject cash purchases	`procurement.cash_purchases.confirm`	v	v		v

Manufacturing

What you can do	Permission	owner	admin	manufacturing_operator	manufacturing_supervisor
Start work orders	`manufacturing.orders.create`	v	v	v	v
Issue material kits	`manufacturing.kit.issue`	v	v	v	v
Log scrap	`manufacturing.scrap.record`	v	v	v	v
Complete work orders	`manufacturing.orders.complete`	v	v		v

CRM

What you can do	Permission	owner	admin	crm_staff	crm_manager
Read contacts, leads, CRM settings and conversations	`crm.contacts.read`	v	v	v	v
Reply from the shared inbox	`crm.inbox.respond`	v	v	v	v
Change contacts and companies	`crm.contacts.manage`	v	v		v
Change deals and pipelines	`crm.deals.manage`	v	v		v
Change templates	`crm.templates.manage`	v	v		v
Change custom objects	`crm.custom_objects.manage`	v	v		v

HR and payroll

What you can do	Permission	owner	admin	hrm_staff	hrm_manager	payroll_officer	payroll_filer
Read personnel files	`hrm.employees.read`	v	v	v	v	v	
Record attendance	`hrm.attendance.record`	v	v	v	v	v	
File a leave request	`hrm.leave.request`	v	v	v	v	v	

What you can do	Permission	owner	admin	hrm_staff	hrm_manager	payroll_officer	payroll_filer
Change personnel files	`hrm.employees.manage`	v	v		v		
Correct attendance and rosters	`hrm.attendance.manage`	v	v		v		
Approve leave	`hrm.leave.approve`	v	v		v		
See government IDs in full	`hrm.identifiers.read`	v			v	v	
See what people are paid	`hrm.compensation.read`	v				v	
See payroll	`hrm.payroll.read`	v				v	
Run payroll	`hrm.payroll.execute`	v				v	
Make and download remittance and tax files	`hrm.payroll.remit`	v				v	v

Accounting

What you can do	Permission	owner	admin	accounting_clerk	financial_controller
Read journal entries	`accounting.journal.read`	v		v	v
Set which accounts stock movements post to	`accounting.mappings.manage`	v			v
See deposits held on sales orders	`sales.deposits.view`	v	v	v	v

What you can do	Permission	owner	admin	accounting_clerk	financial_controller
Read legal entities	`settings.legal_entities.read`	v	v	v	v
Read fiscal periods	`settings.fiscal_periods.read`	v	v	v	v
Read the chart of accounts	`settings.chart_of_accounts.read`	v	v	v	v
Change legal entities	`settings.legal_entities.manage`	v			v
Change fiscal periods	`settings.fiscal_periods.manage`	v			v
Change the chart of accounts	`settings.chart_of_accounts.manage`	v			v

Settings, integrations and payments

What you can do	Permission	owner	admin	payments_admin
Change organization settings	`tenant.settings.manage`	v	v	
Change currencies	`settings.currencies.manage`	v	v	
Change reference code sets	`settings.reference_codes.manage`	v	v	
Manage webhook endpoints	`integrations.webhooks.manage`	v	v	
Manage the mailer	`integrations.mailer.manage`	v	v	
Use the integration builder	`integrations.builder.manage`	v	v	
Set up payment gateways	`payments.configure`	v		v
Issue direct gateway refunds	`payments.refund`	v		v

Users and roles, and other admin areas

What you can do	Permission	owner	admin
See members	`iam.members.read`	v	v
Manage members	`iam.members.manage`	v	v
Manage admins	`iam.members.manage_admins`	v	

What you can do	Permission	owner	admin
View party records (customers, vendors, employees)	`party.records.read`	v	v
Manage party records	`party.records.manage`	v	v
Issue a claim code or link for a walk-in	`people.claim.issue`	v	v
Make and edit custom roles	`iam.roles.manage`	v	v
Manage devices	`iam.devices.manage`	v	v
See the OAuth client registry	`iam.oauth_clients.read`	v	v
Change the OAuth client registry	`iam.oauth_clients.manage`	v	v
Organization, billing and modules	`tenant.manage`, `tenant.billing`, `tenant.modules.manage`	v	
Manage sites	`facilities.sites.manage`	v	v
Manage automations	`workflows.definitions.manage`	v	v
See automation runs	`workflows.executions.read`	v	v
Manage calendar resources	`calendar.resources.manage`	v	v
Manage courses	`lms.courses.manage`	v	v
Upload media	`media.assets.upload`	v	v
Delete media	`media.assets.delete`	v	v

Who can give a role

Each role has a grant permission, `iam.roles.grant.<role id>`. Owner holds every one. Admin holds the grant for employee and for every module role except `payments_admin`, `procurement_controller`, `cost_viewer`, `financial_controller`, `accounting_clerk`, `payroll_officer`, `hrm_manager` and `payroll_filer`. Only an owner can grant those, and only an owner can grant owner or admin.

Tips

- Seeing costs needs `catalog.costs.read`, and reading the books needs `accounting.journal.read`. Admin does not hold either by default; an owner can give an admin the `cost_viewer` or `accounting_clerk` role.
- Employees, cost viewers, cashiers and other roles outside the CRM column do not hold `crm.contacts.read`, so they do not see Leads, Contacts or CRM Settings.
- Only owner and admin hold the two party records permissions. They cannot be given to a custom role.
- `people.claim.issue` can be given to a custom role. DinksyRush clubs use it; the screen to issue a claim is not built yet, so for EVOZO businesses it has no effect today.
- A person can hold several roles. Their permissions are added together.

How to read this page

For what each role is for, see the `roles` chapter. A v means the role holds the permission, either directly or because it builds on another role (a manager role includes everything its staff or operator role can do, and owner includes everything admin can do). A blank means it does not.

Each table shows only the roles that matter for that area, plus owner and admin. Every staff role also builds on **employee**, which gives access to the workspace (`workspace.access`, `app.workspace.access`). The **guest** role (a customer or visitor) holds only `storefront.browse`, `app.storefront.access` and `customer.self.manage`.

To give someone a set of permissions that none of these roles match, make a custom role under Users & roles. See `users-and-roles`.

Troubleshoot - a custom role cannot be saved

These messages appear when you save a custom role. Both come back as a "forbidden" refusal, and the role is not saved.

The message you see

You can only include permissions you hold yourself

```
You can only include permissions you hold yourself
```

A custom role cannot carry these permissions

```
A custom role cannot carry these permissions
```

The response also lists which permissions were refused.

Why it happens

You can only include permissions you hold yourself

The role includes a permission your own account does not have. Only an owner is exempt from this rule. Example: a store supervisor without the refund permission builds a "Cashier lead" role that includes refunds.

A custom role cannot carry these permissions

Some permissions can never be put in a custom role. This applies even to owners.

What to do

You can only include permissions you hold yourself

1. Remove the permissions you do not hold from the role.
2. Save again.
3. If the role needs them, ask an owner to create or edit it.

A custom role cannot carry these permissions

1. Remove the permissions the response lists.
2. Save again.
3. Built-in roles that hold them are given to people in the usual way. Email support@evozo.ph if you are unsure.

Who can fix it

You can only include permissions you hold yourself

An owner can include any allowed permission. Otherwise ask your owner or admin to grant you the permission first.

A custom role cannot carry these permissions

Nobody can add them to a custom role, not even an owner. They are:

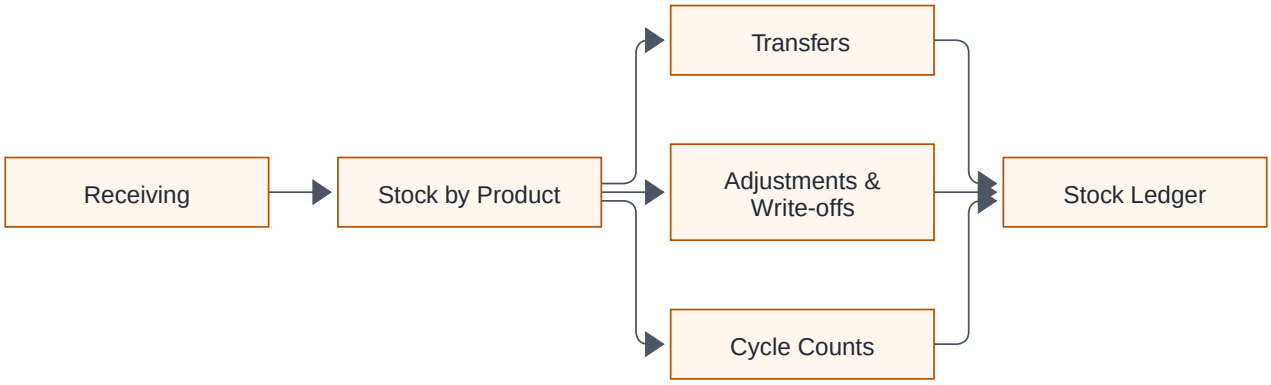
- Managing billing, modules and the organization itself.
- Managing members, managing admins, and managing roles, including the permissions that give someone a role.
- Reading item costs, stock valuation and the journal.
- Payroll, pay and personal identifier details: reading them, running payroll and remitting.
- Managing account mappings, legal entities, fiscal periods and the chart of accounts.
- Setting up payments and making payment refunds.
- Setting the goods-receipt tolerance.
- Viewing and managing party records (customers, vendors and employees in one place). The editor shows these greyed out with "Cannot be given". Only owners and admins hold them.

Whoever needs one of them is given a built-in role that holds it.

Inventory & Warehouse

Inventory at a glance

Inventory (Inventory & Warehouse in the menu) is where you see what stock you hold and where it moves, for example steel flat bar in a fabrication yard, coffee beans in a café back room, or shelf stock in a shop.



Availability

- Basic inventory comes with Sales. You get one stock location for each branch you pay for.
- The Warehouse module removes that limit and adds extra screens: **Stock by Size**, **Count by Size**, **Fulfilment**, **Returns** and **Replenishment**.
- If you cannot see Inventory & Warehouse in the menu, see Find modules (see Find modules). For plans and prices, see Stock locations and your plan (see Stock locations and your plan).

Before you begin

- Your organization uses Sales, which carries basic inventory (see Availability).
- Your role must allow the screen you open. The menu hides entries you cannot use.
- Products come from the catalog. Add them first if you have none.

Key ideas

- A **location** is a place that holds stock. A **facility** is a site of record such as a building or office, and only some facilities hold stock. Facilities are managed in the Facilities module.
- **Lots & Serials** track stock by batch or by individual item.
- **Stock by Product** shows what you hold for each product.
- The Items list shows **On-Hand (All Facilities)**. Batches and replenishment show **Available**. Reserved stock appears only in Sales, as **Stock Reserved**.
- Every change to stock is recorded as a movement. The **Stock Ledger** lists them.
- Corrections go through **Adjustments & Write-offs**, and a **Cycle Counts** session compares what you counted with the system.
- How records work (see How records work) explains drafts, statuses and why saved records are not freely edited.

What you can do here

The Inventory & Warehouse menu groups its screens as Inbound, Internal, Outbound and Control, plus **Dashboard**, **Warehouses**, **Stock by Product** and **Lots & Serials**.

- Bring stock in: Receive stock (see Receive stock), Opening stock (see Set opening stock) and Stock in without a purchase order (see Bringing in stock without a purchase order).
- Move or correct stock: Transfer stock (see Transfer stock between warehouses), Adjust or write off stock (see Adjust or write off stock) and Cycle counts (see Run a cycle count).
- Check the history in **Stock Ledger**, and see **Reports** and **Settings**.
- Read the status pages: Adjustment statuses (see Stock adjustment statuses) and Cycle count statuses (see Cycle count statuses).
- Common questions: Inventory FAQ (see Inventory questions).

What this module does not do yet

- Buying from vendors is done in Procurement, and making goods in Manufacturing.
- Extra locations and the Warehouse screens need the Warehouse module (see Availability).

Related

- Receive stock (see Receive stock)
- Transfer stock (see Transfer stock between warehouses)
- Adjust or write off stock (see Adjust or write off stock)
- Cycle counts (see Run a cycle count)
- Inventory FAQ (see Inventory questions)
- Stock locations and your plan (see Stock locations and your plan)
- How records work (see How records work)
- Find modules (see Find modules)

Receive stock

Bring inbound goods into a warehouse: inspect them, then put them away so they become available.

Before you start

- You need permission to receive stock. Without it the **Direct Receipt** and **+ New Receiving Queue** buttons are hidden.
- You receive by quantity. Unless you are allowed to set costs, you do not see or type any cost on these screens. The cost comes from the purchase order, from the product's last purchase cost, or is filled in later (see **Stock that needs a cost**).
- Stock only becomes available after put-away. Rejected quantity goes to quarantine.
- A delivery is received once.
  - Queue with a GRN ID: the goods receipt already put the stock in. Put-away only moves that stock to the storage location you choose. It does not add stock and does not count on the purchase order again. You can put away at most what that goods receipt received and has not been put away yet. Rejected quantity cannot be entered on such a queue: inspect with the accepted quantity only, then write the rejected units off in **Adjustments & Write-offs** (select **+ New Adjustment**). A write-off is saved as a draft; a person who may approve adjustments must select **Post Adjustment** before the stock changes.

- Queue with only a PO ID: put-away puts the stock in and counts it on that purchase order, accepted and rejected quantity together. Goods put away here cannot be received again on a goods receipt, and goods already received on a goods receipt cannot be put away again here.

Steps

1. Open **Receiving** in the Inventory menu.
2. Click **+ New Receiving Queue**.
3. Choose a **Facility**. Optionally enter a **GRN ID (optional)** and a **PO ID (optional)**.
4. Click **+ Add Line**, pick a product, and enter the **Expected Qty**. Repeat for each product. Use the remove button to drop a line.
5. Click **Create Receiving Queue**.
6. Click the queue card to expand it. Each line shows Expected, Accepted, Rejected, Reason and Status (**Pending Inspection**, **Inspected**, **Put Away**).
7. On a **Pending Inspection** line, click **Inspect**. Fill in **Accepted Qty** and **Rejected Qty**. If any quantity is rejected, choose a **Reject Reason**. Add **Batch Number**, **Expiry Date** or **Serial Numbers (comma-separated)** if the product needs them. Tick **Return to vendor** if the rejects go back to the supplier. Click **Save Inspection**.
8. On an **Inspected** line, click **Put Away**. Choose a **Storage Location** and click **Confirm Put Away**. If you are allowed to set costs, a **Cost per Unit** box also shows; leave it empty to use the purchase order's price.
9. When the line shows **Put Away**, a batch chip appears. A "reject" chip appears if some quantity was rejected.

If a cost you typed differs from the expected cost, a cost approval dialog may open. Follow it to continue.

If the put-away is refused with "Only ... is still to be received on purchase order ...", that part of the order was already received. You can still receive part of an order now and the rest later, up to the ordered quantity: inspect the line again with the quantity that is left. If it says the purchase order "has already been received in full", the whole order is in stock already, so do not put this delivery away again. If it says only some of a goods receipt "can still be put away", the rest of that receipt was put away already.

Direct Receipt (no purchase order)

1. On **Receiving**, click **Direct Receipt**.
2. Choose the **Receiving Facility** and the **Product**.
3. Pick the **Received Unit** (base unit or a pack) and enter the **Quantity (in selected unit)**. If you are allowed to set costs, a **Unit Cost (PHP , in selected unit)** box also shows. Leave it empty to use the product's last purchase cost.
4. Choose a **Receipt Reason**: **Other (General Receipt)** or **Opening Stock (Initial Balance)**.
5. If shown, enter the **Batch/Lot Number**. If the product requires expiry, enter the **Expiry Date**.
6. Click **Receive Stock**.

Anyone who can receive stock can use Direct Receipt. If you cannot set costs, the form has no cost box and tells you so.

If the product has no last purchase cost, the stock is still counted and can be sold. It is marked **Needs cost** until someone fills in the cost.

Stock that needs a cost

Stock received with no purchase order and no last purchase cost is counted at once, but its cost is unknown. It is listed under **Needs Cost** in the Inventory menu (Inbound group). The entry shows only to people who may enter receiving costs (permission procurement.grns.cost) or see costs (catalog.costs.read).

- Who fills it: people who may set receipt costs (for example the owner or a procurement controller). Next to each row, type the **Cost per unit** and click **Confirm cost**. **Use standard** copies the product's standard cost into the box when it is shown; nothing is saved until you click **Confirm cost**.
- Who only sees it: people who may see costs but not set them get the same list without the cost box.
- Two people at once: if someone else already filled the cost, you see a message that it was already set and the list refreshes. Nothing is changed twice.
- What it shows: product, facility, quantity, received date and where the stock came from (receiving queue, opening stock or direct receipt).

Stock that still needs a cost cannot be cut or issued to a work order. The system refuses with "This stock has no cost yet. Ask someone who can set costs to fill it under Inventory > Needs cost." Ask a cost setter to fill it first.

Until the cost is filled in, the stock is not valued and is not mixed into average costs. If some of it was sold or used in the meantime, filling in the cost also fixes the cost of those units.

Tips

- Use the **Facility** and **Status** filters, then **Refresh**, to find a queue.
- Hover a batch chip to see the full batch id.
- To enter starting balances for a new warehouse, see Opening stock.

Set opening stock

Record the stock you already have when you start: whole packs, leftover pieces and loose quantity.

Before you start

- You need permission to receive stock. The **Opening Stock** menu entry is hidden without it.
- Packs must be set up on the product (its Pack units).
- Opening stock is set once per product (and variant) in a warehouse. After that it is view-only; use a stock adjustment to correct it.
- Unless you are allowed to set costs, the form has no cost box. You enter quantities only.

Steps

1. Open **Opening Stock** in the Inventory menu (Inbound group).
2. Choose a **Warehouse**. The products of that warehouse are listed. Search, filter by category, or switch between **Table** and **Cards**.
3. Choose a product. A panel opens showing **Not set** or **Set**.
4. If the product has variants, choose one from the **Variant** list.
5. Under **Whole packs**, enter how many of each pack you have. If the product has no packs, the panel says so.
6. Under **Leftover pieces**, select **+ Add piece**. Enter the **Length**, plus **Width** when the product is measured in two dimensions, and an optional **Barcode (optional)**. Use **Remove** to delete a row.

7. Under **Loose quantity**, enter the loose amount in the product's base unit.
8. If you are allowed to set costs, you can enter the optional cost per unit. Otherwise the stock takes the product's last purchase cost.
9. Select **Set starting stock**.

The page then shows how much was recorded and in how many batches. If the same entry was already recorded, it says nothing was added.

Many products at once: use **Upload from Excel** at the top of the page. It needs the permission to import opening stock, which owners, admins and warehouse managers hold.

When no cost is known

If the product has no last purchase cost, the opening stock is still counted, but the batch is marked "Needs cost". Only people who may enter receiving costs can fill it in, under **Needs Cost** in the Inventory menu. People who can see costs can view the list. Until it is filled in, the stock is not valued. See Receive stock, section **Stock that needs a cost**.

Tips

- If a warehouse's opening stock is locked, the page shows a banner and the entry panel is view-only.
- For a single product without packs or pieces, Direct Receipt with the reason **Opening Stock (Initial Balance)** is another option. See Receive stock.

Transfer stock between warehouses

Move stock from one warehouse to another. A transfer goes Draft, In Transit, Received.

Before you start

- You need permission to run transfers. Without it, **+ New Transfer** and the action buttons are hidden.

Steps

1. Open **Transfers** in the Inventory menu.
2. Click **+ New Transfer**.
3. Choose the **Source Warehouse** and the **Destination Warehouse**.
4. Optionally enter a **Reference Number** and **Notes**.
5. Under **Lines**, click **+ Add Line**, pick a **Product** and enter the **Qty**.
6. Click **Create Draft**. A draft has no stock effect.
7. Click the transfer row (or **View**) to open it.
8. Click **Dispatch (In Transit)** when the goods leave. The table shows the source batches used.
9. At the destination, open the transfer and click **Mark Received**.

To abandon a transfer, open it and click **Cancel Transfer** (shown only while it can still be cancelled).

Move stock straight away from a warehouse's page or the Inventory dashboard

When the goods arrive at once (for example a move within one site), you can skip the separate Dispatch and Mark Received steps. It still creates a transfer document here, with the same stock movements and accounting entries as a transfer dispatched and received by hand.

1. Open the warehouse from Inventory and click **Transfer Stock** in its header, or use the transfer quick action on the Inventory dashboard and choose the **Source Warehouse** there.

2. Choose the **Destination Warehouse**, pick the item and enter the quantity. Add notes if you want.
3. Confirm the transfer. One transfer is created, dispatched and received together, and its reference shows in the message.
4. Open **Transfers** in the Inventory menu to see it with the status **Received**.

If any line does not have enough available stock, nothing moves and no transfer is created.

Tips

- To move a specific pack or leftover piece, pick it in **Batch / pack / piece** on the line; a piece moves whole and a pack batch moves in whole packs, while leaving it on "Any available stock" moves ordinary stock as before.
- Filter by **Source Warehouse** and **Status** (**Draft**, **In Transit**, **Received**, **Cancelled**).
- The **Source Batch(es)** column on the detail shows which lots were deducted.

Adjust or write off stock

Correct stock counts, or write off damaged or lost stock, one lot at a time.

Before you start

- Creating a draft needs adjustment-create permission. **Post Adjustment** and **Void** need adjustment-approve permission.
- At least one active reason code must exist for the type you choose. If not, add one in Inventory Settings first.

Steps

1. Open **Adjustments & Write-offs** in the Inventory menu.
2. Click **+ New Adjustment**.
3. Choose the **Warehouse** and the **Type**: **Adjustment (Stock Up)** or **Write-off (Shrinkage)**.
4. Optionally enter a **Reference Number** and **Notes**.
5. Under **Lines**, click **+ Add Line**. Pick the **Product**, then the **Lot / Batch** (you must choose the actual lot; none is picked for you), the **Qty** and a **Reason**.
6. Click **Create Draft**. A draft has no stock effect.
7. Click the row (or **View**) to open it. Check each line's Delta and Before to After quantities.
8. Click **Post Adjustment** to apply it, or **Void** to discard the draft.

Write off from a warehouse's page or the Inventory dashboard

The write-off form on a warehouse's page (the **Write-Off Stock** button in its header) and the write-off quick action on the Inventory dashboard do not remove stock by themselves. Each sends a write-off for approval, the same way a draft made here does. Stock is never written off straight away from anywhere.

1. Open the warehouse from Inventory and click **Write-Off Stock** in its header, or use the write-off quick action on the Inventory dashboard and choose the **Warehouse Facility** there.
2. Pick the item, then the **Lot**, the quantity and a **Reason Code**. Add notes if you want.
3. Click **Send for Approval**. A draft write-off is created, and the stock does not change yet.
4. Click **Open the write-off** in the message to see it here. Someone with adjustment-approve permission clicks **Post Adjustment** to take the stock out and post it to the books, or **Void** to discard it.

Tips

- Filter by **Warehouse** and **Status** (**Draft**, **Posted**, **Voided**).
- Counting a whole warehouse? Use Cycle Counts; posting a count creates adjustments for you.

Warehouses, storage fixtures and zones

Each warehouse has its own page. It shows what is on hand, lays out racks, shelves and bins on a floor plan, and lets you move a lot from one bin to another. A hardware shop can map its aisles and racks. A café can keep one cold shelf and one dry shelf. A retail shop can use a single "Back room" bin.

To add a new warehouse or see how many your plan allows, see Stock locations and your plan (see Stock locations and your plan).

What needs the Warehouse module

Basic inventory comes with Sales, with one stock location for each paid branch. These parts of this page need the Warehouse module:

- Changing the floor plan layout.
- Adding, generating, relocating, editing or deleting storage fixtures (bins). Looking at them stays in basic inventory.

Without the module, those actions are refused with a message that the feature comes with the Warehouse module.

Before you start

- Open **Inventory** in the menu, then choose a warehouse.
- Buttons for managing fixtures, zones and layout show only if your role has permission to manage warehouses. **Direct Receipt**, **Transfer Stock** and **Write-Off Stock** show if you can receive, transfer or adjust stock.

The warehouse page

Open a warehouse from Inventory. Editing the layout, adding fixtures and zones, and the **Bulk Matrix Generator** need permission to manage warehouses; without it those buttons are hidden.

The header shows the warehouse name, its code, **Active** or **Inactive**, and a **Facilities Master** link to the building record. Four figures sit under it: **Total On-Hand Stock**, **FEFO Batches / Lots**, **Storage Fixtures** and **Total Valuation (PHP)**. Valuation shows a dash if you cannot see costs.

Three tabs:

1. **2D Warehouse Floor Plan** shows fixtures and zones on a canvas. Fixture colour shows how full it is: under 50%, 50% to 89%, and 90% or more (or quarantine).
2. **Storage Hierarchy & Fixtures** lists each rack, aisle or cabinet with its shelves, drawers and bins under it.
3. **Stock Batches & Bins** lists every lot and the bin it sits in. See Lots and serial numbers (see Lots and serial numbers).

Add a storage fixture

1. Click **+ Add Storage Fixture** (or **+ Add Fixture Unit** on the hierarchy tab).
2. Enter a **Storage Code**. **Generate** suggests one.

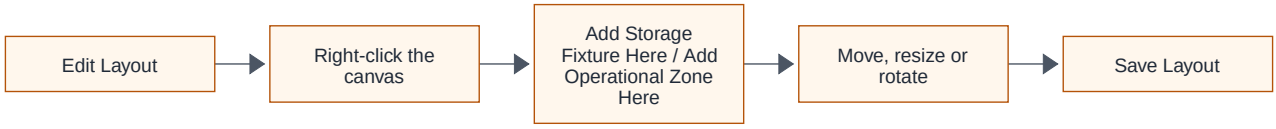
3. Choose a **Unit Type**: Aisle, Rack, Cabinet, Shelf, Drawer or Bin.
4. Enter a **Friendly Name**. Optionally set **Storage Condition** and **Classification**.
5. Click **Save Storage Unit**.

To add a shelf, drawer or bin under an existing fixture, click **+ Sub-tier** on its card, or open the fixture on the floor plan and click **+ Add Shelf / Drawer**.

Create many fixtures at once

1. Click **Bulk Matrix Generator**.
2. Enter a **Prefix** and a **Unit Count** (1 to 50).
3. Choose a **Fixture Type** (Rack, Cabinet or Aisle).
4. Set **Shelves / Sub-tiers per Unit** (0 to 10) and the **Sub-Unit Type** (Shelf, Drawer or Bin).
5. Click **Generate Units**.

Arrange the floor plan and zones



1. On the floor plan tab, click **Edit Layout**. The page switches to the layout editor.
2. Right-click the canvas and choose **Add Storage Fixture Here** or **Add Operational Zone Here**.
3. For a zone, enter a **Zone Name** and choose a **Zone Classification / Type**: staging, loading dock, cold storage, quarantine, forklift lane or general storage. Click **Save Zone**.
4. Drag a fixture or zone to move it. Use the handles to resize it and the round handle to rotate it (the R key turns it 90 degrees).
5. Fixtures not yet placed wait in **Unplaced**. Click one to place it.
6. Click **Save Layout**. **Cancel** or **Discard** throws away unsaved changes.

The **Zones** and **Lanes** buttons show or hide those layers. The condition filter shows only fixtures of one storage condition. **Export** saves the floor plan as an SVG file.

Move a lot to another bin

1. Open the **Stock Batches & Bins** tab and click **Relocate / Putaway** on the lot (or **Relocate** inside a fixture's panel).
2. Choose the **Destination Storage Unit** and the **Quantity to Move**. Add a **Reason / Note** if you want.
3. Click **Confirm Relocation**.

You can also drag a lot from a fixture's panel onto another fixture on the floor plan.

Move stock to another warehouse

Click **Transfer Stock** in the header. See Transfer stock between warehouses (see Transfer stock between warehouses).

Tips

- A lot with no bin shows **Receiving Floor** until you place it.

- **Delete Fixture** removes the fixture. Check that its stock has been relocated first.
- Questions? Write to support@evozo.ph.

Lots and serial numbers

A lot (also called a batch) is a quantity of one item received together, with its own batch number, cost and optional expiry date. A café tracks milk by delivery date. A hardware shop tracks a paint tint run. A retail shop tracks a shipment of one style.

Before you start

- Lots are created when stock comes in, through receiving, direct receipt or opening stock. See Receive stock (see Receive stock).
- Listing lots is part of basic inventory. The reports on this page need the Warehouse module (see below).

See your lots

1. Open **Inventory** in the menu and choose the batches view.
2. Read the columns: **Batch #**, **Item Specification**, **Warehouse Hub**, **Available Qty**, **Status** and **Expiry (FEFO Order)**. A **Cost/Unit** column shows only if you may see costs.

For one warehouse, open it and use the **Stock Batches & Bins** tab. It adds the bin and the **Quantity** and **Valuation (PHP)** of each lot. A date in amber is close to expiry. A date in red has passed.

Lot status

The **Status** column shows **Available**, **Quarantined**, **On Hold** or **Damaged**. Only the first is normal stock. Hold the cursor over the badge to see the reason when one was recorded.

Not available yet: the lot screens have no button to place a lot on hold or release it.

Which lot goes out first

Lots are shown in expiry order, earliest first (FEFO). When you transfer, adjust or pick, you can choose the exact lot. On a pick list the lot must be chosen for every line. See Pick lists and fulfilment (see Pick lists and fulfilment).

Trace a lot or a serial number

The **Lot/Serial Trace** report follows one lot, or one serial number, through every movement.

1. Open **Reports** in the Inventory menu and choose **Lot/Serial Trace**.
2. Enter a batch or the **Serial Number** (exact match). The serial field is disabled while a batch is chosen.
3. Press **Trace**. The result lists the lot details, any **Serial numbers** recorded on it, and its movement history.

Serial numbers appear only when they were recorded on the lot. There is no separate serial-number screen.

Reports and the Warehouse module

Basic inventory (with Sales) includes the valuation report and listing lots. These need the Warehouse module:

- **Expiry & Aging**
- **Turnover & ABC**
- **Lot/Serial Trace**

Tips

- Use a clear batch number such as the supplier's delivery note, so the trace is easy to read later.
- To change where a lot sits, see Warehouses, storage fixtures and zones (see Warehouses, storage fixtures and zones).
- Questions? Write to support@evozo.ph.

Stock and counts by size

Some items are sold by cutting: a sheet of glass, a length of pipe, a roll of fabric. After a cut, the leftover is a piece with its own size. **Stock by Size** shows whole packs per size and the leftover pieces. **Count by Size** lets you count them. Both need the Warehouse module.

Stock by Size

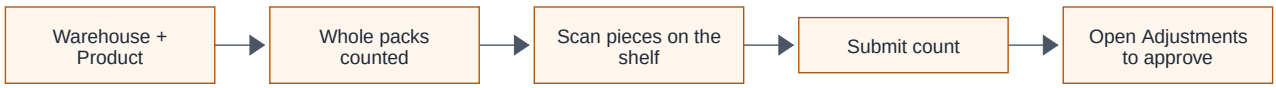
1. Open **Stock by Size** in the Inventory menu.
2. Choose a **Product**. Choose a **Variant** if the product has them, and a **Warehouse** (or **All warehouses**).
3. Read **Whole packs**: **Size**, **Whole packs**, **Opened** and **Quantity** in the item's base unit.
4. Read **Leftover pieces**: **Size**, **Barcode**, **Batch**, **Status** and **Quantity**. For glass and other flat items the size is length x width. For lengths it is one number.
5. The summary lists **Packs**, **Pieces**, **Loose** (when there is plain stock) and **Total**.

Click **Refresh** to reload. With no product chosen, the page asks you to pick one.

Labels and breakage on a piece

- Tick pieces and click **Print selected labels**, or click **Print label** on one row. A piece with no barcode cannot be printed. Use **Select all pieces** to tick every piece. Choose the **Label printer** format: **A4 sticker sheet**, **Thermal label roll** (set the Width and Height in mm), **58 mm receipt** or **80 mm receipt**.
- **Report breakage** shows only if you may adjust stock. It sends the piece for approval as a write-off, so stock changes only when it is approved.

Count by Size



1. Open **Count by Size**.
2. Choose a **Warehouse** and a **Product** (and a **Variant** if asked).
3. Under **Whole packs counted**, type the number you find for each size. Leave a size blank to leave it uncounted. **System** beside it shows what the records say.
4. Under **Pieces on the shelf**, scan or type each barcode in **Scan or type a piece barcode** and click **Add**. Pieces not scanned are listed as counted missing.

5. Under **Pieces found with no record**, click **+ Add found piece** and enter the **Length** (and **Width** for flat items). **Barcode (optional)** is allowed.
6. Add **Notes (optional)** and click **Submit count**.

The page then says **Count recorded.** Each difference becomes an adjustment draft waiting for approval. Click **Open Adjustments to approve** to review them. See Adjust stock or write it off (see Adjust or write off stock). If nothing differs, it says nothing needs adjusting.

Tips

- Plain counts of ordinary stock are in Cycle counts (see Run a cycle count). Those do not need the Warehouse module.
- Moving a piece to another warehouse is on the transfer line: see Transfer stock between warehouses (see Transfer stock between warehouses).
- Questions? Write to support@evozo.ph.

Pick lists and fulfilment

A pick list tells your team what to take from the shelves for a sales order. You pick, pack and ship it in steps. A fabrication shop can pick cut-to-size panels for a job. A retail shop can pick an online order. Fulfilment needs the Warehouse module.

Before you start

- You need an open sales order with quantity still to deliver. See Create a sales order (see Create a sales order).
- Without permission to run fulfilment, the action buttons are hidden.

Steps



1. Open **Fulfilment** in the Inventory menu.
2. Click **+ New Pick List**.
3. Choose the **Sales Order**. The warehouse shows under it.
4. Optionally enter a **Reference Number** and **Notes**.
5. Under **Lines**, set **Qty to Pick** for each product. It starts at the outstanding quantity and can go lower for a partial pick.
6. Click **Create Pick List**. The list is **Pending** and has no stock effect until it ships.
7. Click the row (or **View**) to open it, then click **Start Picking**. The status is **Picking**.
8. For each line choose the **Lot / Batch** you actually took and enter **Qty Picked**. Lots are never chosen for you. Click **Save Picks** to keep your progress.
9. Click **Mark Picked** once every line has a lot and a quantity. The status is **Picked**.
10. Click **Pack**. The status is **Packed**.
11. Click **Ship**. The status is **Shipped**. The detail shows **Sales Order now** with the order's new status.

Cancel a pick list

Click **Cancel** in the detail while the list is **Pending** or **Picking**. Once it is **Picked**, **Packed** or **Shipped**, the button is not offered.

Find a pick list

Filter by **Warehouse** and **Status** (**Pending**, **Picking**, **Picked**, **Packed**, **Shipped**, **Cancelled**), then click **Refresh**. The table shows **Reference**, **Sales Order**, **Warehouse**, **Lines**, **Qty Requested**, **Status** and **Created**.

Tips

- To see which lots are available, see Lots and serial numbers (see Lots and serial numbers).
- Questions? Write to support@evozo.ph.

Record internal consumption

Record stock your business uses itself, such as cleaning supplies or office items. The stock leaves at once. Each record keeps who recorded it, the facility, the time, the items and the reason.

Before you start

- You need permission to ask for adjustments.
- A reason is required. Say what the stock was used for.

Steps

1. In the menu, open **Inventory**, then **Internal Consumption** (under **Internal**).
2. Under **Record consumption**, choose the **Facility**.
3. Under **Product**, open the picker and find the item by name, SKU or barcode. Only items in stock at that facility are listed. If the item has variants, pick the variant.
4. Enter the **Quantity**. Click **Add a line** for more items.
5. Enter the **Reason**.
6. Click **Record**. The stock is deducted from the oldest lots first.

Daily summary

Managers see the **Daily summary** on the same page. Choose a **Day** and, if you want, one **Facility**. The list shows who used what, how much, and why. The cost column appears only for people allowed to see costs.

Good to know

- Setting a stock quantity directly is no longer possible. To correct stock, use **Adjustments**.
- For the cost to reach the books, an admin maps **Internal consumption** in Inventory **Settings**, on the GL mapping tab.

Run a cycle count

Count stock in a warehouse or storage location, review the variance, and post it to Adjustments.

Before you start

- Creating, counting, submitting and reopening needs cycle-count permission. **Post Count** needs adjustment-approve permission.

Steps

1. Open **Cycle Counts** in the Inventory menu.
2. Click **+ New Count**.
3. Choose the **Warehouse**. Pick a **Storage Location**, or leave **Entire warehouse**.
4. Optionally add products under **Product Subset (optional)**. Leave it empty to count every product with stock in scope.
5. Tick **Blind entry** if the counter should not see expected quantities until submitted.
6. Optionally enter a **Reference Number** and **Notes**, then click **Create Draft**. Lines are generated from batches with stock in scope.
7. Open the count (**Open**) and click **Start Counting**.
8. Type the **Counted** quantity on each line. Click **Save Progress** to keep your work.
9. Click **Submit for Review**. The status becomes **Reviewed** and a **Variance** column appears.
10. If a recount is needed, click **Reopen for Recount**.
11. When the variances are accepted, click **Post Count**. The count shows the adjustment documents it created.

Use **Cancel Count** to abandon a count that is not yet posted.

Tips

- Statuses are **Draft**, **Counting**, **Reviewed**, **Posted**, **Cancelled**.
- The list shows **Blind** and **Variant Lines** columns for a quick check.
- To count by size for cut stock, use **Count by Size** (not covered here). **Count by Size** comes with the Warehouse module. Plain cycle counts, as on this page, come with Sales.

Send rejected stock back to the vendor

Return goods you rejected at receiving, for example a box of damaged hinges at a hardware shop or a case of spoiled milk at a café. A vendor return goes Draft, Shipped, Confirmed. A draft can also be cancelled.

This screen needs the **Warehouse** module. Basic inventory, which comes with Sales, does not include **Returns** in the menu.

Before you start

- At receiving, mark the rejected line **Return to vendor** and finish putting it away. Only lines marked this way, with stock still left in their rejected lot, can be picked here. See Receive stock (see Receive stock).
- You need permission to manage returns. Without it, **+ New Vendor Return**, **Cancel Return**, **Ship (Deduct Stock)** and **Confirm** are hidden.

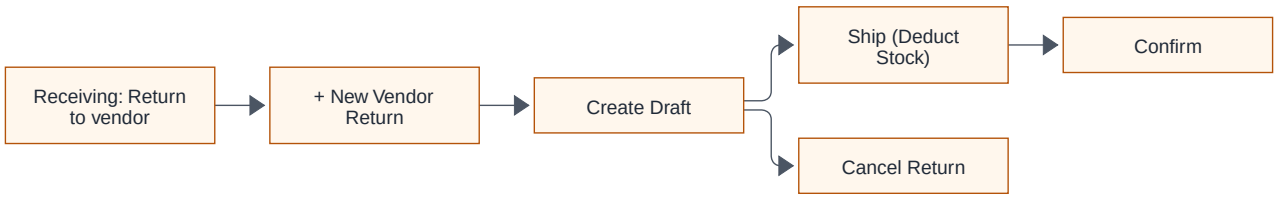
Steps

1. Open **Returns** in the Inventory menu.
2. Click **+ New Vendor Return**.
3. Choose the **Warehouse**. The screen then looks for rejected lots at that warehouse.
4. Optionally enter the **Vendor ID**, a **Reference Number** and **Notes**.
5. Under **Lines**, click **+ Add Line**.
6. Pick the **Flagged Lot**. You always choose the lot yourself; it is never picked for you. The hint shows how much was rejected and how much is still available.
7. Enter the **Qty**. It cannot be more than what is still available in that lot.
8. Click **Create Draft**. A draft has no effect on stock or the books.
9. Open the return from the list (click the row or **View**). When the goods leave, click **Ship (Deduct Stock)**. Stock comes out of the rejected lot.
10. When the vendor accepts the return, open it again, enter the **Vendor Credit Reference** (for example the credit memo number) if you have one, and click **Confirm**.

To abandon a draft, open it and click **Cancel Return**. A shipped return can no longer be cancelled.

What you see in the list

- Filter by **Warehouse** and **Status** (**Draft**, **Shipped**, **Confirmed**, **Cancelled**), then click **Refresh**.
- **GL Entry** shows **Posted** when shipping also made an accounting entry. It shows **Not posted** if the return was shipped without one; the message after shipping then tells you to check the account mapping and the fiscal period (see Inventory settings (see Inventory settings)). A draft shows a dash.
- The detail shows the before and after quantities for each lot, so you can see the stock change.



Tips

- If the **Flagged Lot** list is empty, the screen says no flagged, put-away lines with quantity left were found at that warehouse. Check the receiving line was marked **Return to vendor** and put away.
- A customer refund at the till is a different thing. Refunds do not put stock back on the shelf.
- Need help? Write to support@evozo.ph.

Stock adjustment statuses

The status of a stock adjustment or write-off, and who can move it. A request does not change stock until a manager posts it.

Status	What it means	What can happen next	Who can move it

Status	What it means	What can happen next	Who can move it
Draft	Requested and waiting for approval. Stock has not changed.	Post, or Void.	Create the request: `inventory.adjustments.create`. Post or void: `inventory.adjustments.approve`.
Posted	Approved. The stock quantities and the ledger entry are updated.	Nothing. Posted is final.	No one.
Voided	Turned down or cancelled before posting. Stock never changed.	Nothing. Voided is final.	`inventory.adjustments.approve` (when voiding).

Good to know

- Posting is refused if a line would take its batch below zero.
- Only a Draft can be posted or voided; any other move is refused with the list of allowed next states.
- A void reason, if given, is added to the notes.
- Internal consumption is created already posted, so it never waits as a Draft.

See also: Adjust or write off stock (see Adjust or write off stock), Adjustments and write-offs process (see From stock adjustment draft to posted).

Cycle count statuses

The status of a cycle count sheet, and what can happen next.

Status	What it means	What can happen next	Who can move it
Draft	The sheet is created and not started.	Start counting, or Cancel.	`inventory.cycle_counts.execute`
Counting	Counted quantities are being entered, in as many passes as needed.	Submit for review, or Cancel.	`inventory.cycle_counts.execute`
Reviewed	Every line is counted and the variance (counted minus expected) is fixed. Waiting to be posted.	Post, or Reopen for a recount (back to Counting).	`inventory.cycle_counts.execute`
Posted	Variances are applied to stock. Final.	Nothing.	No one.
Cancelled	Stopped before review. Final.	Nothing.	`inventory.cycle_counts.execute`

Good to know

- Submit for review is refused until every line has a counted quantity.
- Posting creates up to two adjustment documents: an adjustment for positive variances and a write-off for negative ones. A sign with no lines is skipped. These are posted straight away, so they do not wait for a separate approval.
- Posting needs an active reason code for cycle count variances; otherwise it is refused.

- Counted quantities cannot be negative.
- Every cycle count step uses the same permission, so a separate approver is not enforced for counts.

See also: Cycle counts (see Run a cycle count), Stock adjustment statuses (see Stock adjustment statuses).

Read the stock ledger and inventory reports

Use the **Stock Ledger** to see every stock movement in date order, and **Reports** to see what your stock is worth and how it is moving. Both only show information; nothing on these screens changes stock.

Stock Ledger

1. Open **Stock Ledger** in the Inventory menu.
2. Narrow the feed with **Warehouse**, **Product**, **Movement Type**, **From** and **To**. The list updates as you choose.
3. Click **Clear Filters** to start again.

Each row in **Merged Activity Feed** shows **Timestamp**, **Warehouse**, **Product**, **Movement**, **Qty ?** (plus or minus), **Valuation**, **Reference** and **Source**. **Valuation** is the quantity times the unit cost when the entry has a cost; otherwise it shows a dash. **Source** says **Movement Log** or **Ledger**, the two records the feed combines.

Movement types you can filter by include **Stock In**, **Stock Out**, **Adjustment**, **Transfer**, **POS Sale**, **POS Return**, **Waste**, **Internal Consumption**, **Sales Order Fulfilment** and **Scrap / Write-off**.

Example: a café checks why milk stock dropped last week by filtering **Product** to milk and the dates to that week. A hardware shop filters one warehouse to **Transfer** to follow goods sent to a branch.

Reports

1. Open **Reports** in the Inventory menu.
2. Choose a tab. Each tab has its own filters and a refresh button.

Tab	What it shows	Needs
Valuation	On-hand quantity, unit cost and total value per warehouse and product, with the number of batches.	Basic inventory (with Sales)
Expiry & Aging	Batches grouped as **Expired**, **0-30 days**, **31-60 days**, **61-90 days**, **90+ days** and **No expiry tracked**. Use **As of** to look at another date.	Warehouse module
Turnover & ABC	For a **From** and **To** date range: movements, quantity moved, value, value share and an A, B or C class per product.	Warehouse module
Lot/Serial Trace	Enter a **Batch ID** or a **Serial Number** and click **Trace** to see the lot's details, **Movement History** and **Accounting Trail (GL Journal Entries)**.	Warehouse module

Without the Warehouse module only **Valuation** is shown. The **Turnover & ABC** tab asks for both dates; the dates start at the last 30 days.

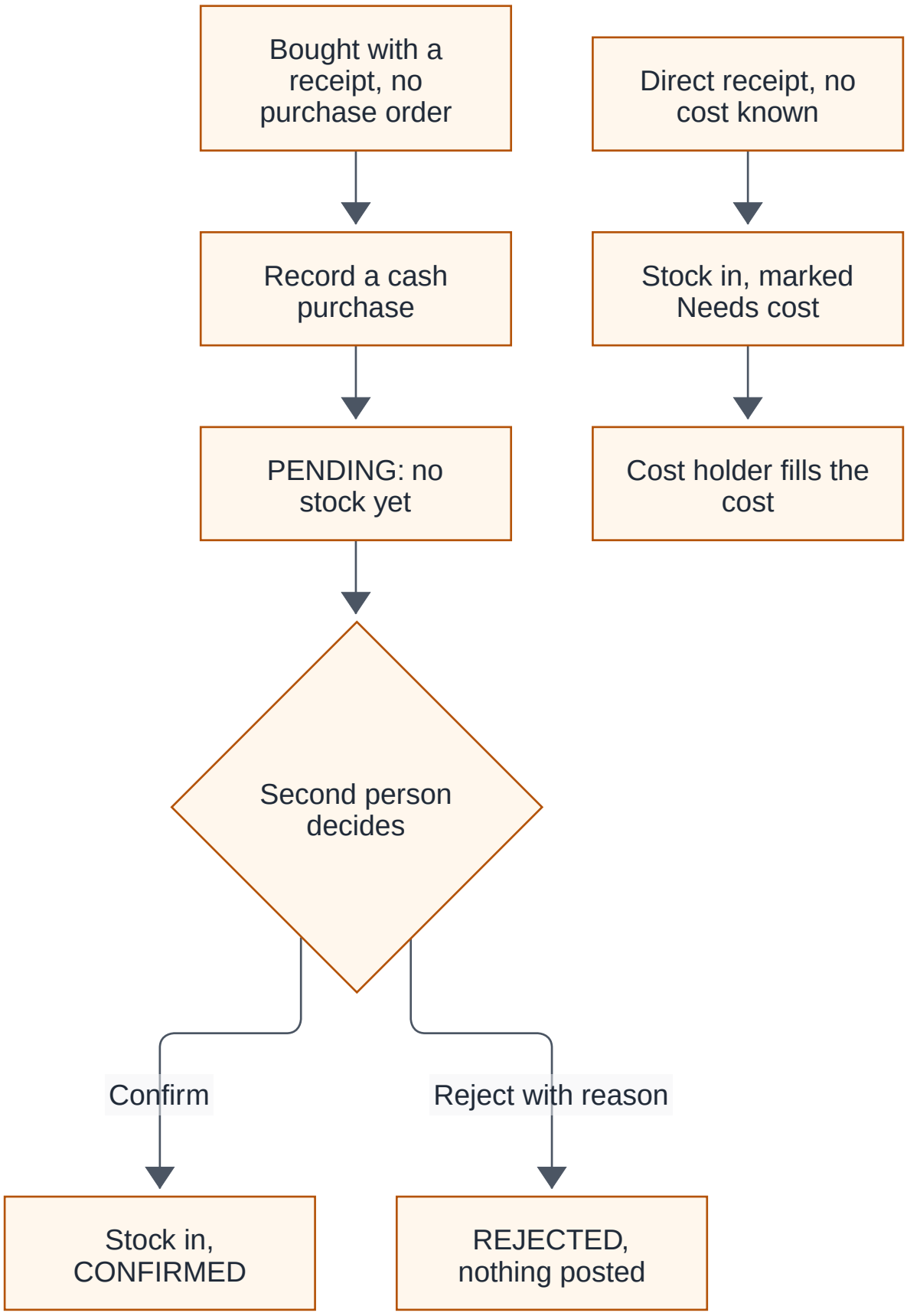
Tips

- If a report is empty, the screen says so (for example "No on-hand stock matches these filters"). Clear a filter or widen the dates.

- Costs shown depend on the costing method in Inventory settings (see Inventory settings).
- Need help? Write to support@evozo.ph.

Bringing in stock without a purchase order

Cover the two ways stock arrives with no purchase order: a cash purchase that a second person confirms, and a direct receipt that may wait for its cost.


Bought with a receipt, no purchase order
Direct receipt, no cost known
Record a cash purchase
Stock in, marked Needs cost
PENDING: no stock yet
Cost holder fills the cost
Second person decides
Confirm
Reject with reason
Stock in, CONFIRMED
REJECTED, nothing posted

Who does what

Role	Does this	Needs
Buyer or shop hand	Records the cash purchase, or does a direct receipt	Record cash purchases, or receive stock
Second person	Confirms or rejects the cash purchase	Confirm cash purchases
Cost holder (for example the owner)	Fills in the cost of stock that arrived with none	Set receipt costs

Steps by stage

1. Record the purchase

1. Open **Cash Purchases** and select **Record a cash purchase**.
2. Type the **Receipt number**, the **Store name**, the **Date of purchase** and where it goes under **Received into**.
3. Under **Items**, choose each product, the quantity and the **Cost per** unit. A shop might record two boxes of tile adhesive bought at a local store; a café might record milk bought at a grocery.
4. Add a **Photo of the receipt** and a **Note** if needed, then select **Record purchase**.

2. Second person confirms

1. The purchase shows as waiting. No stock is added yet.
2. A different person selects **Confirm**, or **Reject** and gives the reason under **Why is it being rejected?**.
3. On confirm, the stock comes in. A rejected purchase leaves nothing to undo.

3. Direct receipt and Needs cost

1. For stock that is not a purchase, use **Direct Receipt** (see Receive stock (see Receive stock)).
2. If no cost is known, the stock is still counted and can be sold, but is marked **Needs cost**.
3. A cost holder opens the Needs Cost list, types the cost per unit and confirms it.

Variations

- A person without the cost permission is held to the business's limit for one purchase and their own daily cap. Both start at zero, so until the owner sets them only the owner or an admin can record a purchase.
- The business can switch the second-person rule off. Then a person who may confirm has their own purchase posted at once and it is marked as self-confirmed.
- A purchase that sits for too long is shown as overdue to the people who can confirm.
- A purchase stuck while being posted shows **Check this purchase**.

What happens behind the scenes

- A recorded cash purchase is PENDING: no stock, no journal, no change to the last purchase cost.
- Confirming claims the purchase so two people cannot post it twice, then creates and receives a purchase order for a supplier made by the system. Stock, batch cost, journal and last purchase cost come from the same receiving code used for every other receipt.

- A receipt sent as a purchase to the plain receiving screen is not accepted there: it is recorded as a cash purchase and waits for the second person.
- The status of a cash purchase is worked out from what was done to it: recorded, confirmed or rejected.

Common problems

- **A different person must confirm a purchase you recorded.** Ask someone else, or ask the owner to change the setting.
- **This purchase is above what you may record on your own.** Ask the owner or an admin to record it.
- "Someone else just decided this purchase." Refresh the list.
- Stock marked **Needs cost** cannot be cut or issued to a work order until the cost is filled in.

Inventory settings

Choose the reasons staff can give for stock changes, which accounts stock movements post to, how cost is worked out, and the rules for cash purchases and receipts. Open **Settings** in the Inventory menu. It is part of basic inventory, which comes with Sales.

The page has five tabs. Who can change each one differs, and a tab you may only read shows its fields locked.

Reason Codes

Reasons staff pick on adjustments, write-offs, receiving rejects and transfer variances.

1. Open the **Reason Codes** tab. Filter by **Category** (**Adjustment**, **Write-off**, **Receiving Reject**, **Transfer Variance**) or tick **Show inactive**.
2. To add one, choose a **Category**, type a **Code** (for example WRONG_SIZE) and a **Label** (for example "Wrong size shipped"), then click **Add Reason Code**.
3. To retire one, click **Deactivate** on its row. It then shows **Inactive**.

Adding and deactivating needs the permission to manage settings; otherwise those controls are hidden.

GL Mapping

Each movement type posts to a debit account and a credit account. The movement types are fixed (**Receipt**, **Adjustment**, **Write-off**, **Transfer**, **Consumption**, **POS Sale**, **Internal consumption**); you only choose the accounts.

1. Open **GL Mapping**. This tab is hidden unless you may read accounting entries.
2. Click **Edit** on a row, choose the **Debit Account** and **Credit Account**, then click **Save**.

The two accounts must differ, except for **Transfer**. If a movement type shows "(not configured)", set it here. Without the permission to manage mappings you can read the tab but **Edit** is hidden.

Costing Method

Pick how the cost of goods used or sold is worked out: **Specific Identification**, **FIFO (First-In, First-Out)** or **Weighted Average**. Select one and click **Save Costing Method**. This changes the cost recorded, not which physical lot is taken.

Cash Purchases

Rules for stock bought on a receipt with no purchase order (see Stock in without a purchase order (see Bringing in stock without a purchase order)). Only the owner can change them; others see **Only the owner can change these.**

- **Limit per purchase for staff (PHP)**: 0 means staff cannot record any. Owners and admins are not held to it.
- **Daily limit per staff member (PHP)**
- **Back-dating allowed (days)** and **Overdue after (days)**
- **A different person must confirm each cash purchase (recommended)**: turn this off only for a one-person shop.
- **Require a photo of the receipt**
- **Email the people who can confirm when a purchase is recorded**

Click **Save Cash Purchase Settings**.

Receipt Tolerance

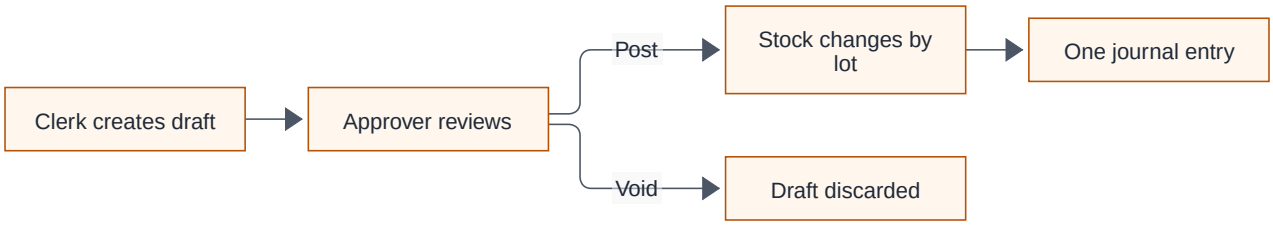
How far the cost on a goods receipt may differ from the purchase order price before a manager must approve it. Set **Maximum variance percentage (%)** and, if you want a hard cap, **Maximum variance amount (PHP)**; leave the amount empty for no cap. Click **Save Receipt Tolerance**. Only the owner or a procurement controller can change these.

Tips

- Changing the costing method or accounts affects entries made from then on. Ask your accountant before changing them mid-year.
- Need help? Write to support@evozo.ph.

From stock adjustment draft to posted

Follow an adjustment or write-off from the person who finds the problem, to the approver who posts it, to the stock and the books.



Who does what

Role	Does this	Needs
Storekeeper	Creates the draft	Create adjustments
Approver	Posts the draft, or voids it	Approve adjustments

Steps by stage

1. Draft

1. Open **Adjustments & Write-offs** and select **+ New Adjustment**.
2. Choose the **Warehouse** and the **Type**: **Adjustment (Stock Up)** or **Write-off (Shrinkage)**.
3. Under **Lines**, add the **Product**, the exact **Lot / Batch**, the **Qty** and a **Reason**. A hardware shop might write off a cracked sheet of glass; a café a tray of spoiled pastries.
4. Select **Create Draft**. A draft has no effect on stock.

2. Review and post

1. The approver opens the draft and checks each line's change and its before and after quantity.
2. Select **Post Adjustment** to apply it, or **Void** to discard it.

3. Check the result

1. The adjustment shows as Posted (or Voided) in the list; filter by **Status**.

Variations

- The **Write-Off Stock** button on a warehouse page and the write-off quick action on the Inventory dashboard do not remove stock themselves. They send a draft for approval with **Send for Approval** .
- A cycle count posts its result through the same posting step.

What happens behind the scenes

- Posting applies each line's change directly to the lot named on the line, never to a lot chosen by expiry order, and records one stock movement per line.
- Posting also records one journal entry for the whole document, using the cost of each line's own lot. All lines of one adjustment share one type, so one pair of accounts is used.
- If the books cannot take the entry (for example no account mapping or a closed period), the adjustment is still posted so the shelf count is right. It is left without a journal entry, which shows it needs fixing in the books.
- An adjustment can be moved from draft only once; the status is a record of what was done to it.
- Posting locks the products on the lines, so two people cannot post over each other.

Common problems

- No reason to choose: add a reason code for that type in Inventory settings first.
- **Post Adjustment** or **Void** is missing: you need the approve permission.
- A posted adjustment has no journal entry: ask accounting to check the account mapping and the period.

Replenishment (not available yet)

Replenishment is not available yet. You cannot set reorder levels from any screen, so there is nothing for it to act on. Until reorder levels can be set, use the steps in "Meanwhile" below.

What exists today

Replenishment appears in the Inventory menu when the **Warehouse** module is on. The screen is a list of products that are at or below a reorder level, and for each one you can:

- **Convert** it, or tick several and click **Convert** to PO, into a purchase order. You choose the **Vendor** and enter a **Unit Cost** per line, then click **Create Purchase Order**. All ticked rows must be for the same warehouse.
- **Dismiss** it, optionally with a **Reason**.

Filter by **Warehouse** and **Status** (**Pending**, **Dismissed**, **Converted**). **Refresh Suggestions** lists products at or below their reorder level, and replaces the pending ones in the warehouse you chose.

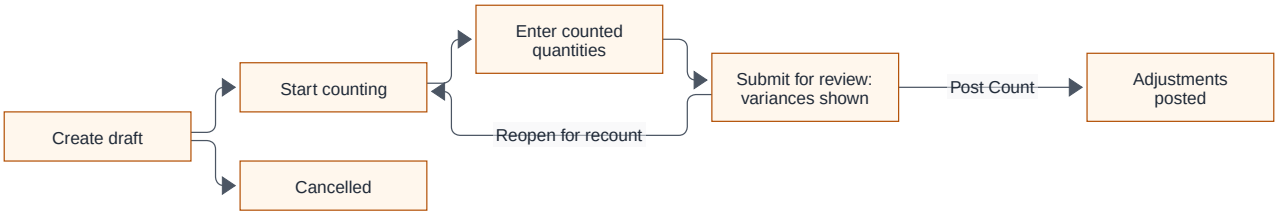
Because reorder levels cannot be set yet, the list stays empty and the screen says "No replenishment suggestions yet". **Refresh Suggestions** will report that no products are at or below their reorder point.

Meanwhile

1. Watch stock levels in **Stock by Product** in the Inventory menu.
2. Check on-hand value and quantities in **Reports**, tab **Valuation** (see Read the stock ledger and inventory reports (see Read the stock ledger and inventory reports)).
3. Raise purchase orders from Procurement as usual. Need help? Write to support@evozo.ph.

From stock count to posted adjustment

Follow a count from the first tally on the shelf to the stock being corrected. Plain counts come with the Sales module; counts by size and cuts need the Warehouse module.



Who does what

Role	Does this	Needs
Counter	Creates, starts, counts, submits, reopens	Cycle-count permission
Approver	Posts the count	Approve adjustments

Steps by stage

1. Count

1. Create the count with **+ New Count** and **Create Draft**, then **Start Counting**. A café might count the pantry shelf; a hardware shop one aisle.

2. Enter the **Counted** quantity on each line. **Save Progress** keeps your work.
3. Select **Submit for Review**. Each line must have a count.

2. Review the variance

1. The count is now Reviewed and shows the **Variance** on each line.
2. If a number looks wrong, select **Reopen for Recount**. The count returns to Counting.

3. Post

1. An approver selects **Post Count**.
2. Lines with more stock than expected go into one posted adjustment. Lines with less go into one posted write-off. A sign with no lines creates nothing.
3. The count shows the adjustments it created, and its status is Posted.

Use **Cancel Count** to abandon a count that is not posted. See Run a cycle count (see Run a cycle count) for the screen steps and From stock adjustment draft to posted (see From stock adjustment draft to posted) for what posting does to stock and the books.

Adjustments stay drafts until someone with the approve permission posts them. Posting a count turns its variances into one adjustment for the extra stock and one write-off for the missing stock, and both are posted straight away.

Variations

- A count can be cancelled any time before it is posted.
- Counts by size and cuts need the Warehouse module.

What happens behind the scenes

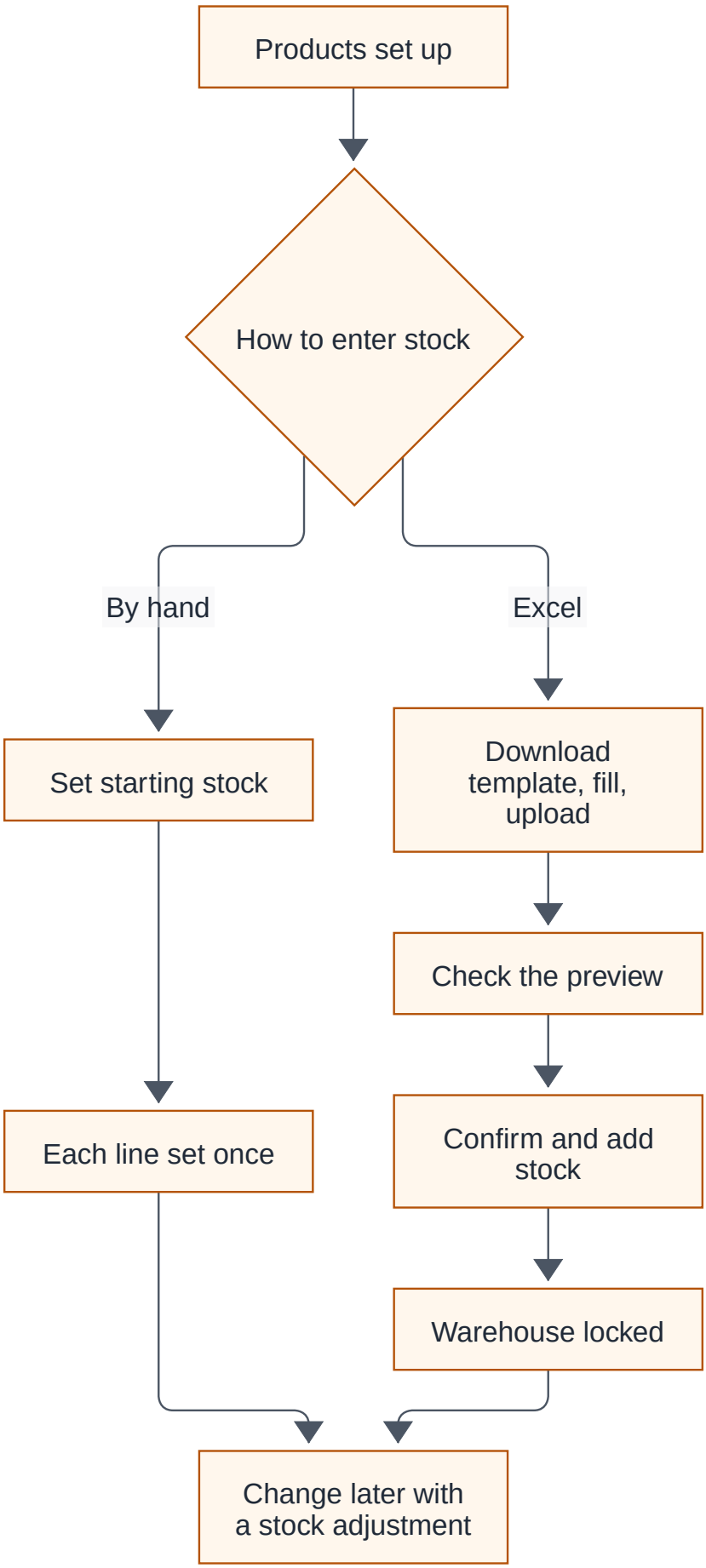
- Posting puts lines with more stock than expected into one posted adjustment and lines with less into one posted write-off.
- A sign with no lines creates nothing.
- The count then lists the adjustments it created.

Common problems

- **Submit for Review** is refused: some lines have no counted quantity.
- **Post Count** is missing: you need the approve permission.
- Questions: support@evozo.ph.

Setting the starting stock of a new shop

Enter what a new shop already has on its shelves, by hand or by Excel upload, and understand when a warehouse becomes locked.


Products set up
How to enter stock
By hand
Excel
Set starting stock
Download template, fill, upload
Check the preview
Each line set once
Confirm and add stock
Warehouse locked
Change later with a stock adjustment

Who does what

Role	Does this	Needs
Owner or stock clerk	Enters or uploads the starting quantities	Receive stock; for upload, import opening stock
Cost holder	Fills in any cost that was not known	Set receipt costs

Steps by stage

1. Get ready

1. Set up the products first, including pack units where stock is counted in packs. See Set opening stock (see Set opening stock).

2. Enter by hand

1. Open **Opening Stock**, choose the **Warehouse** and the **Product**.
2. Enter **Whole packs**, **Leftover pieces** and **Loose quantity**.
3. Select **Set starting stock**. The page shows how much was recorded.

3. Or upload from Excel

1. Select **Upload from Excel**, then **Download template (.xlsx)**. It has one sheet per warehouse.
2. Type the quantities. Rows left blank or 0 are skipped.
3. Select **Choose Excel file**. The page lists **Lines to add**, **Skipped (already set)**, **Skipped (no quantity)** and **Errors**. Fix errors in the file and choose it again.
4. Select **Confirm and add stock**.

4. After the upload

1. The warehouse shows a message that opening stock is locked and view-only, with the date and who uploaded.
2. To change a locked warehouse, use a stock adjustment. See Adjust or write off stock (see Adjust or write off stock).

Variations

- A warehouse can be uploaded once. Entering by hand is not locked unless an upload was confirmed, but each line (a pack of a product, or the base unit) can be set only once per warehouse and variant.
- A line already set by hand is skipped by a later upload.
- For one product with no packs, a direct receipt with the reason **Opening Stock (Initial Balance)** also works. See Receive stock (see Receive stock).
- A cost column is optional. Without the permission to set costs, the stock takes the product's last purchase cost, or is marked Needs cost.

What happens behind the scenes

- Both ways save through the same step, which receives each entry like normal receiving: one batch and one stock movement per row, with the reason opening stock. No journal entry is posted.

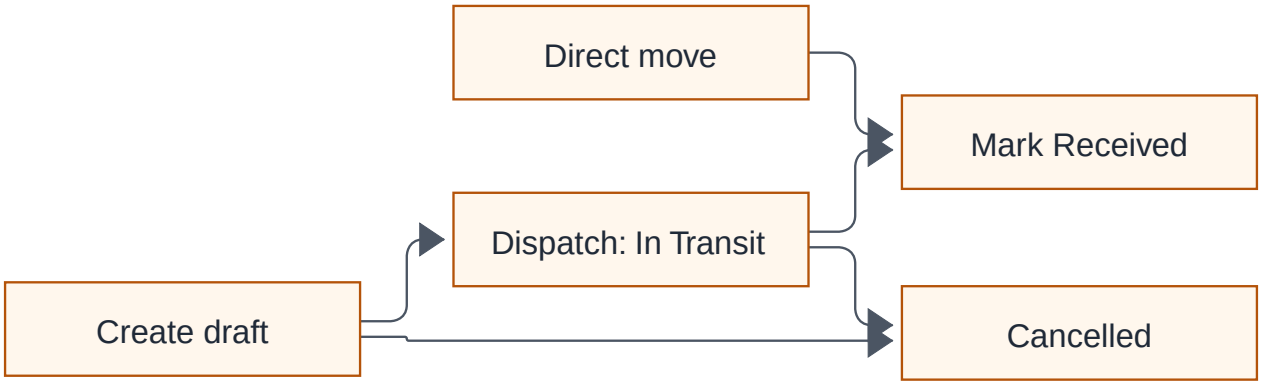
- Each row has its own key, so sending the same file again adds nothing.
- The lock is not a setting. It is worked out from the confirmed upload records for that warehouse.
- A hand entry and an upload for one warehouse run one after the other, never at the same moment.

Common problems

- "Starting stock of ... is already set in this warehouse ... Use a stock adjustment to change it." That line was already entered.
- "Opening stock for this warehouse is locked ... Use a stock adjustment to change it." A confirmed upload locked the warehouse.
- Upload preview shows errors: **Confirm and add stock** stays unavailable until the file can be confirmed.

Moving stock between warehouses

Follow a transfer from the draft, to the goods leaving the source, to the goods arriving at the destination.



Who does what

Role	Does this	Needs
Storekeeper	Creates, dispatches, receives and cancels	Run transfers

Steps by stage

1. Draft

1. Select **+ New Transfer**, choose the **Source Warehouse** and **Destination Warehouse**, add lines, and select **Create Draft**. A draft has no effect on stock. A café might move milk to a second branch; a retailer a box of cables.

2. Dispatch

1. Select **Dispatch (In Transit)** when the goods leave. Stock is taken from the source and the transfer is In Transit.

3. Receive

1. At the destination, select **Mark Received**. Stock is added there and the transfer is Received.

Cancel

Select **Cancel Transfer** while it can still be cancelled.

Direct move

From a warehouse page, **Transfer Stock** creates, dispatches and receives one transfer together. If any line lacks stock, nothing moves.

See Transfer stock between warehouses (see Transfer stock between warehouses) for the screen steps.

Variations

- A direct move from a warehouse page does the draft, dispatch and receipt in one step.
- A transfer that is not yet received can be cancelled.

What happens behind the scenes

- A draft changes nothing. Stock leaves the source when you dispatch, and shows as In Transit until it arrives.
- Stock reaches the destination when you mark it received.
- A direct move changes nothing at all if any line lacks stock.

Common problems

- Not enough stock at the source: the move is refused whole.
- Buttons hidden: you need permission to run transfers.
- Questions: support@evozo.ph.

Inventory & Warehouse: frequently asked questions

Inventory questions

Short answers about receiving, transfers, adjustments and counts.

Questions

Q: Why is the stock I received not available yet?

A: Stock becomes available only after put-away. Inspect the line, then click **Put Away**.

Q: Where do rejected items go?

A: Rejected quantity is routed to quarantine. After put-away the line shows a separate "reject" batch chip.

Q: I created a transfer but stock did not move.

A: A new transfer is a draft with no stock effect until you click **Dispatch (In Transit)**. It reaches the destination when you click **Mark Received**.

Q: I created an adjustment but the quantity did not change.

A: An adjustment is a draft until someone with approval permission clicks **Post Adjustment**.

Q: Why can I not pick a lot automatically on an adjustment?

A: The page requires you to choose the actual lot for each line. Lots are never auto-picked.

Q: The Reason list is empty on an adjustment.
A: No active reason code exists for that type. Add one in Inventory Settings.

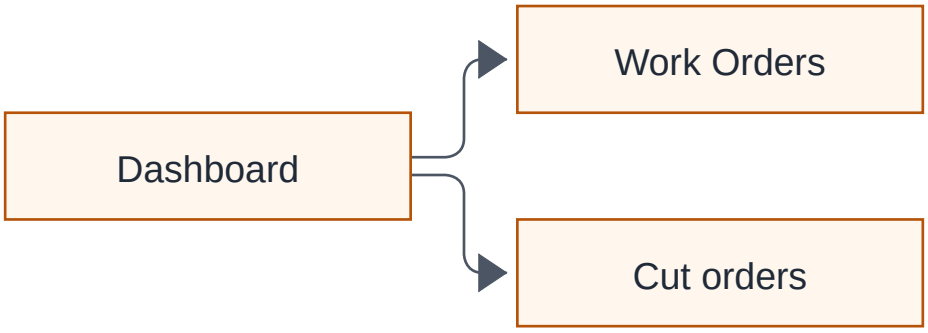
Q: Why do I not see Expected quantities when counting?
Blind entry. Expected quantities are hidden until the count is submitted.

Q: Why can I not use Direct Receipt?
A: It needs the Cost Setter permission, because there is no purchase order to set a baseline cost.

Manufacturing & Assembly

Manufacturing at a glance

Manufacturing (Manufacturing & Assembly in the menu) is where you make or cut goods from stock, for example a batch of welded gate frames, steel bars cut to length, or a tray of pastries made from ingredients.



Work orders are created with **New Work Order**, and the wording follows your business type. Not available yet: cancelling a work order and a quality-inspection step. A work order moves from Draft to In progress (**Issue Kit via FEFO**) to Completed.

Availability

- Manufacturing is a separate module. If you cannot see Manufacturing & Assembly in the menu, your organization does not have it. See Find modules (see Find modules) or write to support@evozo.ph.
- **Cut orders** come with the Warehouse module, not with Manufacturing.
- Manufacturing is listed as needing Warehouse & Advanced Inventory.

Before you begin

- Your organization has Manufacturing for work orders, or Warehouse for cut orders (see Availability).
- Your role must allow the screen. **Cut orders** needs permission to read cuts.
- Products and their bills of materials exist in the catalog.

Key ideas

- A **work order** is a job to make a product from materials. See Work order statuses (see Work order statuses).
- A **cut order** is a job to cut stock to size. See Cut order statuses (see Cut order statuses).
- How records work (see How records work) explains drafts, statuses and why saved records are not freely edited.

What you can do here

The Manufacturing & Assembly menu has these screens: **Dashboard**, **Work Orders** and **Cut orders**.

- Follow work orders from the dashboard and read their statuses.

- Follow cut orders in **Cut orders**.

What this module does not do yet

- It does not buy materials (Procurement) or show full stock levels (Inventory).

Related

- Work order statuses (see Work order statuses)
- Cut order statuses (see Cut order statuses)
- How records work (see How records work)
- Find modules (see Find modules)

Cut orders

A cut order is a length or sheet sold at the till that still has to be cut. The cutter works through the cutting queue, says which pack or piece it came from, and records what was left over. Think of a hardware shop cutting a pipe to length, or a fabric shop cutting a roll.

Cut orders come with the Warehouse module.

Start at the till

Cut orders start at the till. In the POS terminal, add the item and open the **Cut to size** dialog. Enter each cut with **Add cut**, then **Save cut**. At checkout, one cut order is queued for every cut line. A quotation does not queue a cut. A sales order's **Send to production** creates work orders, not cut orders.

After checkout the till shows the cut slip, marked **Queued for cutting**, with a barcode starting CUT-, the **Cut size**, the **Quantity** and the **Order**. Click **Print cut slip** to print it from your browser. The receipt shows a line "Cut" followed by the size. The cutter scans or types the slip number on the **Cut orders** screen to open the job.

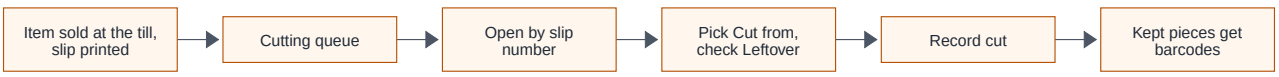
Label the leftover

Leftover pieces can be labelled from **Stock by Size** in the Inventory menu. Tick pieces (or use **Select all pieces**) and click **Print selected labels**, or click **Print label** on one row. Pick the **Label printer** format: **A4 sticker sheet**, **Thermal label roll** (set the Width and Height in mm), **58 mm receipt** or **80 mm receipt**. See Stock and counts by size (see Stock and counts by size).

Before you start

- To see the cutting queue you need permission to view cuts. Without it the screen is not available.
- To record a cut, cancel an order, report breakage or ask for a correction you need the separate permission to record cuts. Without it those buttons are hidden and you can only look.
- Forcing a refused cut needs the approval permission that supervisors hold.

How a cut order moves



Steps

1. When the till sells a cut item, the order gets a slip number starting **CUT-** and joins the cutting queue.
2. Open **Cut orders**. The queue lists the oldest first, with the slip, the item and size, the customer or till order number, and how long it has waited. Use **Warehouse** to show one warehouse or **All warehouses**.
3. Click a row, or scan or type the slip number into **Slip number** and click **Open**.
4. Under **Cut from**, choose the pack or piece you are cutting. The first one is marked suggested. If nothing fits, the page says no stock in this warehouse fits the cut; transfer a pack or piece there first.
5. If the source is a sheet pack, enter the **Sheet width** and **Sheet length**.
6. Enter the **Blade loss**. The **Leftover** section shows the piece or pieces that will be kept. Change the **Length** (and **Width** for sheets) if the real leftover is different. **Use the proposal** puts the suggested sizes back.
7. Click **Record cut**.

The result shows **Cut recorded**: the scrap quantity, each **Kept piece** with its size and **barcode**, and any piece that was scrapped with the reason. Put the barcode on the physical piece so you can find and sell it later. Anyone allowed to see costs also sees the source cost, the cost of the sale and the value of the kept pieces.

What is kept and what is scrapped

- A leftover at or above the product's minimum size becomes a new piece of stock with its own barcode.
- Anything below the minimum size is scrapped when the cut is recorded.
- If nothing worth keeping is left, the page says so and the remainder becomes scrap.

Cancel an order

Click **Cancel order**, enter a **Reason** and click **Yes, cancel it**. The sale line is not refunded here; refund it at the till if the customer wants their money back. Use **Keep it** to back out.

Stock held for other orders

Some packs and pieces are listed under **Held back for other orders** because another open order needs them. A cutter cannot choose them. A supervisor can.

If a cut is refused for that reason, a supervisor sees **Override (supervisor)**. They enter a **Reason for forcing this cut** and click **Force cut**. The orders left without stock are marked **Needs stock** in the queue, and the override is recorded.

Breakage and corrections

- **Report breakage** on an open order tells the shop a pack or piece broke. That stock is held and the suggested sources change.
- **Request correction** on a finished order asks to fix what was recorded, for example a leftover that has a different size, a cut that came from a different source, scrap that should have been kept, or a leftover that is really scrap.
- Both requests show under **Breakage and corrections** as "Waiting for supervisor approval" until a supervisor approves them.

Tips

- Each status is explained in Cut order statuses (see Cut order statuses).
- Cut orders are one kind of work order. For other production jobs see Work orders (see Work orders) .
- **Needs stock** on a queue row means the shop cannot cut that order from what it holds now. Hover over it to see the reason.

Work order statuses

Every status a work order can have, what it means and who can move it.

Status	What it means	What can happen next	Who can move it
Draft	A new work order, not yet started.	Issue the material kit, which makes it In progress.	`manufacturing.kit.issue`
Scheduled	Planned and waiting.	Issue the material kit, which makes it In progress.	`manufacturing.kit.issue`
In progress	The material kit is issued and stock is taken.	Record scrap, or complete.	`manufacturing.scrap.record`; `manufacturing.orders.complete`
QA inspection	Waiting for a quality check.	Complete.	`manufacturing.orders.complete`
Completed	Finished goods are made and the journals are posted.	Nothing.	None
Cancelled	Stopped.	Nothing.	None

Rules

- A Completed or Cancelled order cannot have a kit issued and cannot be completed again.
- Completed quantity must be greater than zero.
- If the order was made for a sales order that requires a deposit, it cannot start until the deposit is held. A user with `sales.deposits.override_hold` can start it by giving a reason.
- Stock whose cost is not known yet cannot be issued in a kit. The request is refused.
- Creating or changing a work order takes `manufacturing.orders.create`. Reading is open to anyone signed in.
- Cut-to-size jobs are work orders of type Cut. They follow their own steps; see Cut order statuses (see Cut order statuses).

Work orders

A work order turns materials into finished goods. A fabrication shop might make ten windows from aluminium profiles and glass. A café kitchen might prepare a batch of syrup from its ingredients. A retailer might bundle items into gift sets.

Manufacturing is its own module. The screen opens from **Manufacturing** in the menu.

Before you start

- Each action has its own permission: creating an order, issuing the kit, logging scrap and completing the order. A button you are not allowed to use is hidden.
- Your business type changes some wording on the screen, such as the name of the order and of the scrap list. This page uses "work order".

Steps

1. Open **Manufacturing**. The cards at the top show active orders, finished units, material efficiency, scrap loss and completed orders. Search by number, title or work center, and filter with **All**, **Draft**, **In Progress** or **Completed**.
2. Click **New Work Order** (or "+ New Work Order"). The wording follows your business type, for example Batch Prep Run, Cutting & Sewing Order, or Job Order & Cut List. The "Create New Work Order" window opens. You need permission to create work orders.
3. Enter the **Order Title** and choose the **Order Type**: **Assembly Run (Standard BOM)**, **Custom Job Order / Fabrication**, **Kitchen Prep & Commissary** or **Kitting & Bundling**.
4. Enter the **Planned Quantity**. Optionally choose the **Finished Product**; its bill of materials is then picked up automatically.
5. Enter the work center and the **Estimated Direct Labor Cost**, then choose the **Destination Warehouse** where finished goods will go.
6. Click **Create Work Order**. It appears in the table.
7. Click the row or **Execute & Manage** to open it. The components, planned and issued quantities are listed.
8. While the order is a draft or scheduled, click **Issue Kit via FEFO**. This takes the components out of stock, oldest expiry first. The order then shows **Kit Issued (Stock Deducted)**.
9. If material is lost, click **+ Log Scrap Loss**. Choose the **Component Item**, the **Scrap Quantity**, the **Unit of Measure** and a **Reason Code / Notes**, then click **Confirm Scrap Write-Off**. The loss is written off as an expense.
10. When the work is done, enter **Actual Finished Units Produced** and the **Direct Labor Cost Incurred**, then click **Complete Order & Yield to Warehouse**. The finished goods are added to the destination warehouse.

Good to know

- Not available yet: cancelling a work order and a quality-inspection step. A work order moves from Draft to In progress (**Issue Kit via FEFO**) to Completed.
- The destination warehouse must be able to receive stock. If it is over your plan's limit, the finished goods are refused. See Stock locations and your plan (see Stock locations and your plan).
- Cut-to-size jobs are a kind of work order but are handled on their own screen. See Cut orders (see Cut orders).

- For what each status means and what can happen next, see Work order statuses (see Work order statuses).

Cut order statuses

Every status of a cut-to-size job, which is a work order of type Cut.

Status	What it means	What can happen next	Who can move it
Scheduled (queued)	Sold at the till and waiting to be cut. It shows in the cutting queue.	Record the cut, or cancel.	`inventory.cuts.record` (record or cancel)
In progress	Still open in the cutting queue.	Record the cut, or cancel.	`inventory.cuts.record` (record or cancel)
Completed	The cut is recorded.	Nothing.	None
Cancelled	The job was cancelled when its till order is refunded before the cut, or by a manual cancel.	Nothing.	`inventory.cuts.record` (manual cancel)

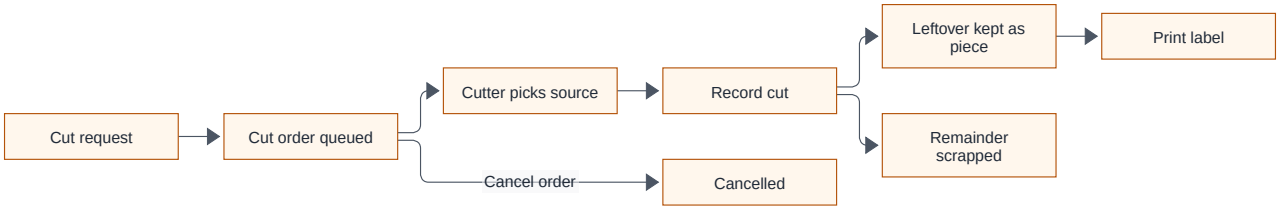
Rules

- Scheduled and In progress are the open statuses. Open jobs are the cutting queue, and sold but uncut lengths are subtracted from availability.
- A cut job cannot have a material kit issued or be completed through the normal work order steps. Use the cut steps.
- A cut job is queued by a cut request. It needs a product.
- If there is not enough stock to cut, the request is refused with a stock-short error.

See also Work order statuses (see Work order statuses).

From cut order to labelled leftover

Follow a cut-to-size job from the request, to the cutter who records what was used and what is left, to a label on the leftover piece. Cut orders come with the Warehouse module, so this applies when you have Warehouse.



Who does what

Role	Does this	Needs
Sales or counter staff	Queue the cut	Create work orders
Cutter	Records the cut, or cancels it	Record cuts

Role	Does this	Needs
Supervisor	Forces a cut that would take stock held for other orders	Override right

Steps by stage

1. Queue the cut

Cut orders start at the till. In the POS terminal, add the item and open the **Cut to size** dialog. Enter each cut with **Add cut**, then **Save cut**. At checkout, one cut order is queued for every cut line. A quotation does not queue a cut. A sales order's **Send to production** creates work orders, not cut orders.

After checkout the till shows the cut slip, marked **Queued for cutting**, with a barcode starting CUT-, the **Cut size**, the **Quantity** and the **Order**. Click **Print cut slip** to print it from your browser. The receipt shows a line "Cut" followed by the size. The cutter scans or types the slip number on the **Cut orders** screen to open the job.

1. A cut request names the product and the size, for example a 600 mm length of pipe in a hardware shop, or a strip of cloth in a fabric store.
2. The order joins the cutting queue as Scheduled (queued) and shows the first source suggested to the cutter. If nothing in the warehouse fits, the request is refused as short of stock. See Cut order statuses (see Cut order statuses).

2. Record the cut

1. Open the order from the queue.
2. Under **Cut from**, choose the pack or piece to cut. The suggested one is marked **suggested**. Stock held back for other orders is shown but cannot be chosen, except by a supervisor.
3. Check **Blade loss** and the **Leftover** sizes. If nothing worth keeping is left, it becomes scrap.
4. Select **Record cut**.

3. What the system records

1. The source is used up, the customer's cut is taken as the sale, and each kept leftover becomes a new piece with its own barcode.
2. Anything below the product's minimum size, and the blade loss, is written off as scrap, and its cost goes with the sale.
3. The order becomes Completed.

4. Label the leftover

Leftover pieces can be labelled from **Stock by Size** in the Inventory menu. Tick pieces (or use **Select all pieces**) and click **Print selected labels**, or click **Print label** on one row. Pick the **Label printer** format: **A4 sticker sheet**, **Thermal label roll** (set the Width and Height in mm), **58 mm receipt** or **80 mm receipt**. See Stock and counts by size (see Stock and counts by size).

1. Open the stock-by-size view and find the piece under **Leftover pieces**.
2. Select **Print label**.

Cancel

Select **Cancel order** before the cut is recorded. The order becomes Cancelled. If a cutter finds the source broken, **Report breakage** sends it for approval.

Variations

- If nothing in the warehouse fits, the request is refused as short of stock.
- A supervisor can pick stock held back for other orders.
- A cut that is not wanted can be cancelled before it is recorded.

What happens behind the scenes

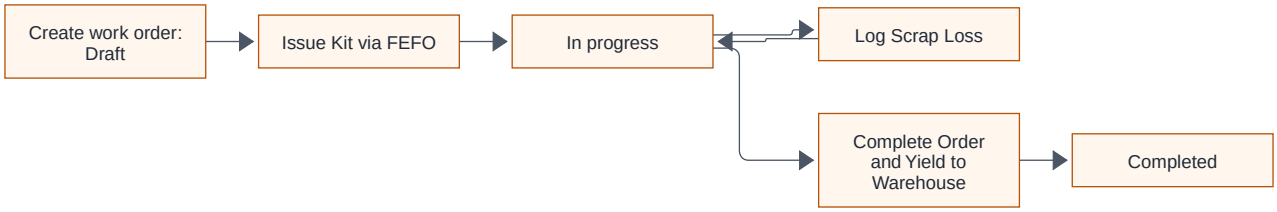
- Recording the cut uses up the source, takes the customer's cut as the sale and gives each kept leftover its own barcode.
- Blade loss and anything below the product's minimum size is written off as scrap, and its cost goes with the sale.
- The order becomes Completed.

Common problems

- "Needs stock" on an order: a supervisor forced a cut that used its stock.
- No source shown: transfer a pack or piece to this warehouse first.
- Questions: support@evozo.ph.

From work order to finished goods

Follow a production job from the work order, through issuing materials, to finished goods in stock. Manufacturing is a separate module from Procurement.



Not available yet: cancelling a work order and a quality-inspection step. A work order moves from Draft to In progress (**Issue Kit via FEFO**) to Completed.

Who does what

Role	Does this	Needs
Planner	Creates the work order	Create work orders
Storekeeper	Issues the kit	Issue kits
Operator	Logs scrap	Record scrap
Supervisor	Completes the order	Complete orders

Steps by stage

1. Create

1. Create the work order. It starts as Draft. A fabrication shop might make a steel bracket; a café a batch of syrup.

2. Issue the kit

1. Select **Issue Kit via FEFO**. Material is taken from stock, earliest expiry first, and the order becomes In progress.
2. If the order is for a sales order that needs a deposit, it cannot start until the deposit is held. A user with the override right can start it with a reason.
3. Stock whose cost is not known yet cannot be issued.

3. Record scrap

1. Select **+ Log Scrap Loss** for material lost on the way. It is recorded as an expense.

4. Complete

1. Enter the completed quantity, which must be more than zero, and select **Complete Order & Yield to Warehouse**.
2. The finished goods go into the warehouse as a new batch, and the order is Completed. A completed order cannot be completed again.

See Work order statuses (see Work order statuses). Cut-to-size jobs follow From cut order to labelled leftover (see From cut order to labelled leftover).

Variations

- A work order for a sales order that needs a deposit waits until the deposit is held. A user with the override right can start it with a reason.
- Cut-to-size jobs follow a separate process.

What happens behind the scenes

- Issuing the kit takes material from stock, earliest expiry first, and cannot use stock whose cost is not known yet.
- Scrap you log is recorded as an expense.
- Completing puts the finished goods into the warehouse as a new batch. A completed order cannot be completed again.

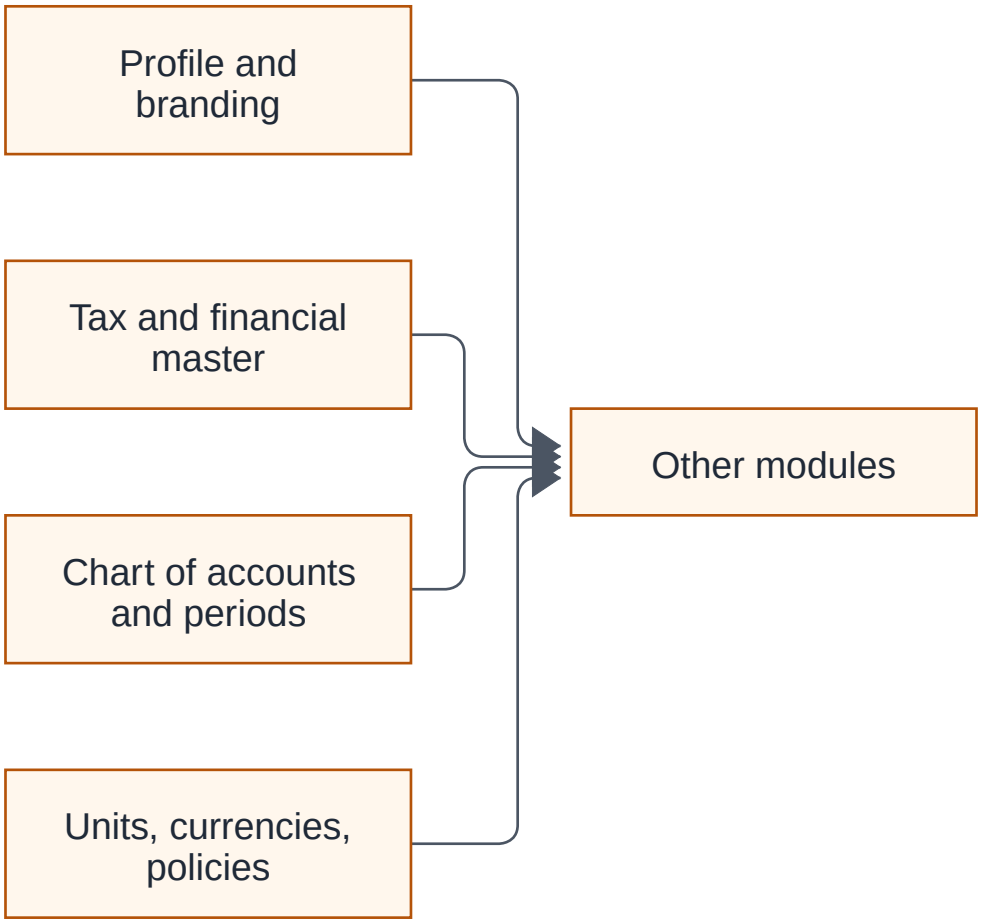
Common problems

- Kit refused: the order is already Completed or Cancelled, or a deposit is not yet held.
- Questions: support@evozo.ph.

Organization & Settings

Organization and Settings at a glance

Settings is where you describe your business once, such as its name, tax details, branches and units, so every other module uses the same facts.



Before you begin

- Your role decides what you see. Only an Owner can change the name, address, tax details and bank accounts.
- Some pages need extra permissions, for example Chart of Accounts and Fiscal Calendar & Periods.

Key ideas

- The **Organization & Settings** menu holds the setup that everyone shares.
- **Tax & Financial Master** holds VAT and price settings.
- **Chart of Accounts** and **Fiscal Calendar & Periods** are used by Accounting.
- **Units of Measure & Conversions** and **Currencies & Exchange Rates** keep quantities and amounts consistent.

- **Sales & POS Policies** hold the rules Sales and the till follow.

What you can do here

The screens are **Profile & Branding**, **Legal Entities & Branches**, **Fiscal Calendar & Periods**, **Tax & Financial Master**, **Chart of Accounts**, **Currencies & Exchange Rates**, **Units of Measure & Conversions**, **Reference Data & Codes**, **Sales & POS Policies** and **Billing & Payments**.

- Update your profile, branding and tax settings.
- Set up branches, accounts, units and policies.
- Billing & Payments is described in Billing at a glance (see Billing at a glance).

What this module does not do yet

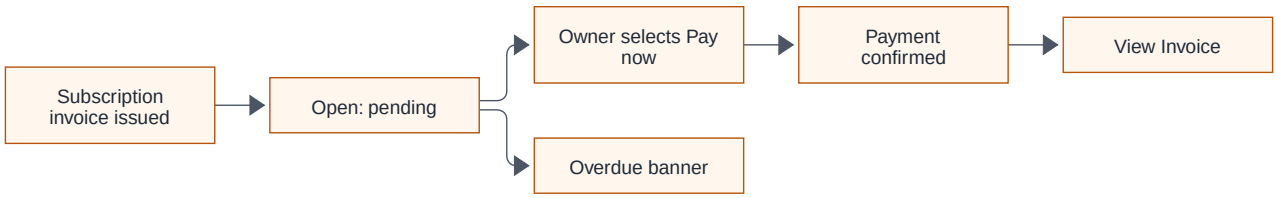
- The menu has no screens for managing users or roles. Those are under Identity & Access; see Users and roles at a glance (see Users and roles at a glance).

Related

- Organization settings (see Organization settings)
- Settings FAQ (see Settings FAQ)
- First day setup (see First-day setup checklist)
- How EVOZO is organised (see How EVOZO is organised)
- Billing at a glance (see Billing at a glance)

Billing at a glance

Billing is where the owner sees the invoices for the organization's own EVOZO subscription and pays them. It is not about what your customers pay you.



Before you begin

- Open **Organization & Settings**, then **Billing & Payments**.
- Only an Owner can pay. Other people see "Only an owner can pay invoices." next to open invoices.
- Billing is for your staff. A customer who signed in without a staff role cannot open the invoices or the billing status.

Key ideas

- The **BILLING STATUS** card says what the account owes, such as "You have no open invoices."
- **Subscription Invoices & Payment History** lists each invoice with **Invoice #**, **Billing Period**, **Modules Billed**, **Amount Due**, **Status** and **Payment Method**.
- **Pay now** opens the payment and the page updates by itself when it is confirmed.
- **View Invoice** shows the invoice detail, including the total, VAT where shown, the payment method and the reference.

- An overdue invoice shows a banner on every page, with a link to **Billing & Payments**. If it stays unpaid the account can be suspended; the banner says when.

What you can do here

- Check what is owed and open an invoice.
- Pay an open invoice (Owner).
- Read past invoices and how they were paid.

What this module does not do yet

- You cannot add or remove modules, or change or cancel the subscription, in the app. To change your plan or modules, contact EVOZO support at support@evozo.ph.

Related

- Plans, prices and extras (see Plans, prices and extras)
- Organization settings (see Organization settings)
- Organization and Settings at a glance (see Organization and Settings at a glance)
- Getting help (see Getting help)
- Welcome to EVOZO (see Welcome to EVOZO)

Organization settings

Update your organization's profile, branding and tax settings.

Before you start

- You need the permission tenant.settings.manage.
- Only an owner can change the name, address, tax details and bank accounts.

Steps

1. Open **Organization & Settings**. **Profile & Branding** is the first page.
2. Edit the profile and branding fields.
3. Open **Tax & Financial Master**.
4. Turn on **BIR 12% VAT Registered** if it applies.
5. Check **VAT rate (%)** and **Prices include VAT**.
6. Select **Save Settings**.

Tips

- Save before you leave a page.

Plans, prices and extras

EVOZO prices are set in US dollars and billed in pesos, with limits on the entry plans and paid extras.

Before you start

- Open **Organization & Settings**, then **Billing & Payments**.

- Only an Owner can pay invoices and change extras.

Prices and your invoice

1. Prices are set in US dollars and include VAT. For example, Sales for one branch is US$32 a month, and the Starter bundle is US$64 a month.
2. You are billed and you pay in pesos. Each invoice converts the dollar price at the Bangko Sentral ng Pilipinas (BSP) reference rate for the invoice date. If no rate was published that day, the latest rate published within the previous five days is used. If there is none, the invoice is issued once a new rate is published.
3. In **Subscription Invoices & Payment History**, **Amount Due** shows the peso amount with the dollar price and the rate, like `PHP 2,038.08 (US$32 at PHP 63.69)`.
4. **View Invoice** adds a **Price** line such as `US$32 at PHP 63.69 (BSP reference rate, 2027-01-15)`. The date is the rate date. The invoice amount is what you pay.
5. A quarterly or yearly invoice uses the rate on its invoice date for the whole period it covers.

Billing cycles

- You can be billed monthly, quarterly or yearly.
- A yearly plan means you pay for 10 months and get 12.
- Organisations that joined before the US dollar price list took effect keep their peso prices and agreements.

What the entry plans include

These limits apply to organisations created after the US dollar price list took effect and that are on it. Earlier organisations have no such limits.

- Sales for one branch, without Warehouse: 3 users, 1 till and 500 products.
- The Starter bundle: 5 users, 1 till and 1,000 products.
- Other Sales sizes, and Warehouse plans other than the Starter bundle, have no user, till or product limit.

A limit never deletes anything. It stops you adding one more, with a message such as "Your plan includes 3 users. Add extra users or upgrade to add another." Users count active people and invitations not yet accepted.

Extras

The **Extras** card on **Billing & Payments** shows extras when your plan can use them. Extras are sold on the Starter bundle and on custom plans.

Extra	Price	What it adds
Extra users	US$4 a month each	One more user
Extra tills	US$6 a month each	One more till
Extra branches	US$6 a month each	One more branch, on the 6–20 branches Sales plan without Warehouse

1. Select **Add one** next to an extra. You pay only for the added units for the rest of the billing period, on your next invoice.
2. Use the minus and plus buttons to change the number, or select **Remove**.

3. Removing takes effect at once; the card notes **Not refunded**. You cannot remove a user or till extra while that user or till is still in use. Remove the user or till first.

Basic inventory and Warehouse

- Basic inventory comes with Sales. You get one stock location for each branch you pay for: 1, 5 or 20, depending on the Sales size.
- More locations come with the Warehouse module or with extra branches.
- Warehouse-only features are cuts, holding and releasing lots, stock and count by size, pick lists, vendor returns, replenishment, bin layout, and the expiry, turnover and lot trace reports. Bills of materials come with Warehouse or Manufacturing.
- Organisations created before the US dollar price list took effect keep their Warehouse features.
- If you ask for a feature your plan does not include, you see "This feature comes with the {Module} module." with the module name.

If you move to a smaller plan

- Nothing is deleted.
- Stock locations above your new limit become read-only for stock coming in: receiving, transfers in, stock added by an adjustment, opening stock and finished goods from manufacturing.
- Stock can still go out by transfer or write-off. Sales at the POS from those locations are refused. A customer refund still puts the goods back.
- To get a location back, add the Warehouse module or extra branches, or move its stock to a location that is not read-only. See Stock locations and your plan (see Stock locations and your plan).

Tips

- The EVOZO billing rate here is not the same as the exchange rates you keep for your own sales.
- You cannot add or remove modules, or change your plan, in the app. To change your plan, contact EVOZO support at support@evozo.ph.
- Peso amounts marked with "~" on the EVOZO website and in the app are estimates at the current rate. The invoice is what counts.

Related

- Billing at a glance (see Billing at a glance)
- Organization settings (see Organization settings)
- Stock locations and your plan (see Stock locations and your plan)

Reference data and codes

Edit the value lists behind the dropdowns in Sales, POS, Inventory and Customers.

Before you start

- Everyone who is signed in can open these screens and read the lists.
- To change a list you need the permission settings.reference_codes.manage. By default the owner and admin roles have it.
- If you are not sure which role you have, ask your owner or write to support@evozo.ph.

Steps: edit a flat list

1. Open **Organization & Settings**, then go to **Reference Data & Codes** (`/settings/codes`).
2. Pick a set in the left list. Sets are grouped, and sets the system created are tagged **system**.
3. Add a value with a **Code** and a **Label**. The description is optional.
4. To change a value, edit its label or description. Use the **Active** switch to deactivate a value you no longer want.
5. To reorder, drag a row or use the up and down arrows.

System sets cannot be removed. You can still rename, reorder, add and deactivate their values.

Steps: use a curated editor

Some lists need more than a code and a label. They have their own screen. Open them from the **Curated editors** cards at the top of **Reference Data & Codes**.

Card	Page	What you edit
Product Categories	`/settings/codes/product-categories`	The category tree for the catalog: add, rename, reorder, move under another parent.
Product Attributes	`/settings/codes/product-attributes`	Attribute sets and their ordered values (for example Size: S, M, L), used to make variants.
Payment Methods	`/settings/codes/payment-methods`	POS payment types, with cash-drawer, reference-number and change flags, and a link to a GL account.
Discount Types	`/settings/codes/discount-types`	Amount or percent discounts, with caps and approval or reason requirements.
Tax Exemption Categories	`/settings/codes/tax-exemption-categories`	Statutory exemption categories, and whether a certificate number is required.

Tips

- Deactivate a value instead of deleting it when you want it out of the dropdowns.
- For every setting and who can change it, see the settings reference page.

Currencies and exchange rates

PARTIALLY AVAILABLE
You can set up currencies and rates, but nothing else in EVOZO uses them yet. Invoices, prices and reports are not converted. Everything stays in PHP.

Record the currencies your organization uses and the rates between them.

Before you start

- Everyone who is signed in can read this screen.
- To change anything you need the permission settings.currencies.manage. By default the owner and admin roles have it.

- Setting this up now does not change any amount you see elsewhere.

What it does today

You can	It affects
Turn a currency on or off in the **Currency set**	Which currencies the other boxes on this screen offer
Pick a **Functional currency** for each legal entity	The record on this screen only
Add **Transactional currencies** to a legal entity	The record on this screen only
Add, remove or sync **Exchange rates**	The rate list on this screen only

Today these rates are used only on this screen. Invoicing and Pricing do not convert amounts with them yet, although the screen text mentions them.

These are your organization's own rates. They are separate from the exchange rate EVOZO uses for its own subscription invoices to you.

Steps

1. Open **Organization & Settings**, then **Currencies & Exchange Rates** (`/settings/currencies`).
2. In **Currency set**, select **Enable** or **Disable** next to a currency.
3. In **Functional currency**, choose a **Legal entity**, then choose its currency. A new choice closes the earlier one.
4. To add another currency to that entity, use **Transactional currencies**, choose a currency and select **Add**.
5. In **Exchange rates**, choose **From** and **To**, enter the **Rate** and the date, then select **Add rate**. Or select **Sync market rates**.

Tips

- In the live EVOZO system, rates refresh automatically every day at 3:00 AM PHT, using European Central Bank reference rates (a backup source is used if a currency is not covered). In test and staging systems there is no daily refresh. To refresh sooner, select **Sync market rates**.
- Legal entities are managed on their own page. See the settings overview.
- Questions: support@evozo.ph.

Settings reference

Every settings screen, what each setting does, its default, and who can change it. "Owner" means the organization owner. Fields not marked otherwise can be read by anyone who opens the screen.

Profile & Branding (/settings, /settings/profile)

Setting	What it does	Default	Who can change it
Legal Entity Name (Registered)	Registered name of the organization	Empty	Owner
Trade / Storefront Name	Name shown to customers	Empty	Owner

Setting	What it does	Default	Who can change it
Contact Phone, Public Support Email	Contact details	Empty	`tenant.settings.manage`
Billing & Finance Email	Contact email for billing	Empty	Owner
Country	Country of the address	PH	Owner
Province / State / Region, City / Municipality, Barangay, Postal Code / ZIP, Physical Street Address	Address	Metro Manila (NCR), Pasig City, San Antonio, empty, empty	Owner
Time zone	Time zone used by the organization	Asia/Manila	Owner

Tax & Financial Master (/settings/financial)

Setting	What it does	Default	Who can change it
Tax Identification Number (TIN)	Your tax number	Empty	Owner
BIR 12% VAT Registered	Turns VAT on	Off	Owner
VAT rate (%)	VAT rate, 0 to 100	12	Owner
Prices include VAT	Whether listed prices already contain VAT	On	Owner
Company Bank Accounts	Bank name, holder, number, linked GL account, notes	None	Owner

Units of Measure (/settings/uom)

Units of measure are set on this screen only. Both lists save to the organization settings and need `tenant.settings.manage`.

Setting	What it does	Default	Who can change it
Units of Measure	Your own units. Each has a code (with a **Generate Code** button), symbol, name, category, system, a description, and a base-unit checkbox. Saved with **Create Custom UOM** or **Save Changes**	None until you add one	`tenant.settings.manage`
Unit Conversion Rules & Multipliers	Converts one unit to another by a factor: from unit, to unit, factor, conversion type, description. Saved with **Save Conversion Formula** or **Save Formula Changes**	None until you add one	`tenant.settings.manage`

Sales & POS Operational Policies (/settings/policies)

Setting	What it does	Default	Who can change it
Sales mode	**POS (point of sale, receipt)** or **Ordering System (OMS Terminal, plain order slip)**. Saved with **Save sales mode**. Applies the next time the app loads	POS	`tenant.settings.manage`
Quotations: approval	**Always (every quotation is approved first)**, **Only when a rule is hit**, or **Never**	Only when a rule is hit	`tenant.settings.manage`
Quotations: rules	**Total above (PHP)** (blank means no amount rule); **The customer buys on credit terms**; **A discount goes beyond the preparer's own limit**. Shown only when "Only when a rule is hit" is chosen	No amount rule; both checkboxes on	`tenant.settings.manage`
Default deposit	**Off (none)**, **Percent of the total (%)**, or **Fixed amount (PHP)**	Off	`tenant.settings.manage`
Start production only after the down payment	Holds production until the down payment	On	`tenant.settings.manage`
Cashier Discretionary Discount Limit	Above this %, a manager must approve (0 to 50)	5%	Owner
Manager Approval Limit	A manager can approve up to this %; above needs owner or admin (0 to 50)	15%	Owner
Margin Warning (%)	Warns when a price is below cost plus this % (0 to 1,000)	10	Owner
Refund Approval Amount (PHP)	Refunds above this need a manager (0 to 10,000,000). Counted per sale: earlier refunds of the same sale add up	1,000	Owner
Cash in/out approval amount (PHP)	Cash put into an OMS till drawer, or an expense taken out of it, above this amount needs a manager (0 to 10,000,000). Expenses are counted per till per business day, across every shift of that till that day	1,000	Owner
Cash drop approval amount (PHP)	Cash drops (drawer cash moved to the safe) above this total, per till per business day, need a manager (0 to 10,000,000). Separate from the cash in/out amount: drops do not count toward the expense total	10,000	Owner
Round the price after a per-item discount to the nearest PHP	Rounds the item's price after its own discount to this step at the till, on quotations and on sales orders (0 to 100, two decimals; 0.00 is off)	0.00	Owner

Setting	What it does	Default	Who can change it
Default Quotation Validity (Days)	Validity for a new quotation with no expiry date (1 to 365)	30	`tenant.settings.manage`

The Quotations card is saved with **Save quotation settings**. Without `tenant.settings.manage` it is read-only.

Billing & Payments (/settings/billing)

See the billing overview page. It shows your plan and subscription invoices.

Finance configuration

Screen	Route	Permission to open	Permission to change
Legal entities	`/settings/entities`	`settings.legal_entities.read`	`settings.legal_entities.manage`
Fiscal periods	`/settings/periods`	`settings.fiscal_periods.read`	`settings.fiscal_periods.manage`
Chart of accounts	`/settings/coa`	`settings.chart_of_accounts.read`	`settings.chart_of_accounts.manage`

Owner and admin can also open these screens.

Codes and currencies

Screen	Route	Read	Change
Reference Data & Codes, and its five curated editors	`/settings/codes`	Anyone signed in	`settings.reference_codes.manage`
Currencies & Exchange Rates	`/settings/currencies`	Anyone signed in	`settings.currencies.manage`

See the reference data and currencies guides. Currencies are not used by other modules yet. Exchange rates on the Currencies screen refresh daily in the live system and do not convert any invoicing or pricing amount.

Questions: support@evozo.ph.

Send a request to EVOZO

Use **My requests** to ask EVOZO to close your account, delete its data or turn on DinksyRush for your club, and to follow what happened to each request.

Before you start

- Open **Organization & Settings**, then **My requests**.
- Only an Owner can send, read or cancel requests. Other people do not see the entry.
- EVOZO staff decide every request by hand. Nothing changes until a request is approved.

Steps

1. Select **New request**.
2. Under **What do you want to ask for?**, choose **Close the account**, **Delete the account data** or **DinksyRush add-on**.
3. Read the explanation that appears. It says exactly what you are asking for and what happens when EVOZO approves. **Send request** stays off until you have chosen a request, so you always see these words before sending.
4. For **DinksyRush add-on**, pick a plan: **Starter** (US$16 a month), **Club** (US$32 a month) or **Pro** (US$64 a month). The price is added to your EVOZO invoice, billed in pesos at the BSP rate, prorated for the rest of this period. Your EVOZO plan does not change.
5. For the other two requests you can add a **Note for EVOZO** (optional).
6. Select **Send request**. The button is off while the request is being sent, so one tap sends one request.

Follow a request

The list shows each request with its status:

Status	Meaning
Waiting for EVOZO	Sent, not decided yet. You can cancel it.
Approved	EVOZO approved it. For the add-on, **Finishing setup.** shows while your club is still being linked to the plan.
Declined	EVOZO said no. The **Reason** line says why.
Cancelled	You cancelled it.

To cancel, select **Cancel request** on a request that is **Waiting for EVOZO**. Only the person who sent a request can cancel it, so you will not see the button on a request someone else sent. Approved, declined and cancelled requests have no cancel button.

If something goes wrong

- **You already have a request of this kind waiting.** Cancel it or wait for the decision before sending another.
- **DinksyRush is already active** on this account, so a second add-on request is not needed.
- **The add-on is not available** for this account right now. Contact support at support@evozo.ph.
- **The club name is reserved, or a club with this name already exists.** Contact support at support@evozo.ph to choose another name.
- **This request has already been decided or cancelled.** Reload the list to see its current status.
- **You do not have permission.** Ask an owner of the organization to send the request.

Tips

- Cancel while a request is waiting if you change your mind.
- Closing the account and deleting its data are separate requests.

Questions

Q: Why can I not see My requests?

A: Only the organization's Owner can use it. Ask an owner to sign in and send the request.

Q: When is the DinksyRush price charged?

A: When EVOZO approves, the plan's monthly price is added to your EVOZO invoice for the rest of the current period, billed in pesos at the BSP rate.

Add an EVOZO module to your club's plan

Take an EVOZO module, such as Warehouse, for your DinksyRush club from the list of offers, and cancel it later.

Before you start

- Open **Organization & Settings**, then **ERP modules**.
- Only an Owner can add or cancel a module. Other roles do not see the entry. EVOZO refuses the change for anyone else.
- The entry is for organizations that belong to a DinksyRush club. An organization that buys its modules through its own EVOZO plan does not have it.
- You must use the EVOZO sign-in. The club app sign-in cannot change modules.

Add a module

1. Under **Modules you can add**, find the module. Each offer shows the module name, your size band and the price per month.
2. Read the note under the offer. It says: "Billed on your next invoice: a part-month charge now, then" the monthly price and "month".
3. Select **Add to my plan**. The button is off while the request is being sent, so one tap sends one request.
4. The module is on at once. There is nothing to approve. It shows in the menu after the list refreshes.

The price depends on your size band and is set per workspace. A module with no price for your band is not offered.

Cancel a module

1. Under **Modules on your plan**, find the module and select **Cancel**.
2. Read the question. Cancelling keeps the module on until the end of the period you have paid for, then it is switched off. There is no refund.
3. Select **Yes, cancel this module**, or **Keep it** to stop.
4. The module then shows the date it stays on until, and has no **Cancel** button.

Tips

- You can add a cancelled module again only after it has ended.
- If the module is already on, **Add to my plan** tells you and charges nothing more.

Questions

Q: Why does it say the module is not on offer?

A: The price or your plan changed since the page opened. The list refreshes; pick again.

Q: Why does it say to wait N seconds?

A: Too many changes in a short time. Wait the seconds shown, then try again.

Q: Why can I not add a module?

A: The organization may not be active, or your role is not Owner.

Set your organization profile and TIN

Enter your registered business name, address and Tax Identification Number (TIN) so they print correctly on receipts and quotations.

Before you start

- You need the permission tenant.settings.manage.
- Only an owner can change the name, address, tax details and bank accounts. Other people see a note saying so.
- Only your staff can read the full profile. A customer who signed in to your storefront without a staff role sees only the trade name, legal name, logo, banner and time zone, never the TIN, bank accounts or contact details.
- Have your BIR registration papers at hand. For a hardware shop this is the name on your certificate, not the sign over the door.

Steps

1. Open **Organization & Settings**. **Profile & Branding** opens first.
2. Fill in **Legal Entity Name (Registered)**. This one is required.
3. Fill in **Trade / Storefront Name**, for example the café name your customers know.
4. Fill in **Country**, **Province / State / Region** and **City / Municipality**. They are required.
5. In the Philippines, also fill in **Barangay (Official 2026)** and **Postal Code / ZIP**.
6. Type the street in **Physical Street Address (Unit, Building, Street)**.
7. Add **Contact Phone** and, if you want, **Public Support Email** and **Billing & Finance Email**.
8. Check **Time zone**.
9. Open **Tax & Financial Master** and type your number in **Tax Identification Number (TIN)**. The format hint is `000-000-000-000`.
10. Select **Save Settings**.

Result

Your trade name, address, phone and TIN are used for the header of receipts. See VAT registered or non-VAT (see VAT registered or non-VAT) for how the TIN is labelled.

Tips

- Save on each page before you move to the next.
- The receipt header and footer text cannot be changed on screen yet. No settings page has a field for them.

- More on the other settings pages: Organization settings (see Organization settings).

Questions

Q: Why are the fields greyed out?

A: Only an owner can change the name, address, tax details and bank accounts.

Q: Who do I ask for help?

A: Write to support@evozo.ph.

VAT registered or non-VAT

Choose whether your organization is VAT registered, and see what that changes on receipts.

Before you start

- You need the permission tenant.settings.manage. Only an owner can change tax details.
- Know your BIR registration. A small café that is not VAT registered leaves the switch off.
- Enter your TIN first: Set your organization profile and TIN (see Set your organization profile and TIN).

Steps

1. Open **Organization & Settings**, then **Tax & Financial Master**.
2. Turn **BIR 12% VAT Registered** on if you are VAT registered. Leave it off if you are not.
3. Check **VAT rate (%)**.
4. Set **Prices include VAT**. On means listed prices already contain VAT. Off means VAT is added on top of the price.
5. Select **Save Settings**.

Result

On the receipt	VAT registered	Non-VAT
TIN line	**VAT Reg TIN:** followed by your TIN	**Non-VAT Reg TIN:** followed by your TIN
VAT line	**VAT (12%)** is shown	No VAT line; the receipt says **Non-VAT**
Input-tax line	**THIS DOCUMENT IS NOT VALID FOR CLAIM OF INPUT TAX.**	The same line

The input-tax line is printed on every receipt and order slip, VAT registered or not.

If your organization uses an Ordering System (OMS) order slip instead of POS, the TIN is labelled plainly **TIN**, and only the input-tax line is added.

Tips

- A receipt follows the VAT setting your organization had when the sale was made. Changing it later does not rewrite old receipts.

- Example: a hardware shop that turns VAT on today prints **VAT Reg TIN:** and a **VAT (12%)** line from the next sale.

Questions

Q: My receipt says Non-VAT Reg TIN but I am VAT registered.

A: Check that **BIR 12% VAT Registered** is on and saved. If it is, write to support@evozo.ph.

Manage legal entities and branches

Record the registered companies and branches under your organization, and the tax IDs of each.

Before you start

- You need settings.legal_entities.read to open the page. Owners and admins can open it without it. Changing anything needs settings.legal_entities.manage.
- Example: a fabrication group has one parent company and a separate company for its retail shop.

Steps

1. Open **Organization & Settings**, then **Legal Entities & Branches**.
2. Select **Add Root Entity**. On an empty page, select **Create Your First Organization**.
3. Type the **Legal Name**, pick the **Entity Subtype**, then select **Create Entity**.
4. To add a branch, select an entity box, then **+ Add Child Unit**. Fill in the same fields and select **Create Entity**.
5. To change an entity, select its box and edit **Legal name**, **Trade name**, **Registration no.** or **Subtype**. Select **Save Changes**.
6. To move it, choose another entity under **Parent entity (re-parent)**.
7. Under **Tax IDs & Registrations**, pick a type, type the **Identifier Number**, then select **Add ID**.
8. Use **Deactivate** or **Reactivate** to switch an entity off or on. **Delete** removes it.

Result

The page shows your entities as a tree. **Rollup History** lists each change of parent with its dates.

Tips

- Re-parenting writes a new record and closes the previous one; nothing is overwritten.
- Entities are used by the chart of accounts (see Set up your chart of accounts).

Questions

Q: I cannot see this page.

A: Your role does not include settings.legal_entities.read. Ask an owner or admin, or write to support@evozo.ph.

Set up your chart of accounts

Build the list of ledger accounts your books use, and switch them on for each legal entity.

Before you start

- You need settings.chart_of_accounts.read to open the page. Owners and admins can open it without it. Changing accounts needs settings.chart_of_accounts.manage.
- Have at least one legal entity: Manage legal entities and branches (see Manage legal entities and branches).

Steps

1. Open **Organization & Settings**, then **Chart of Accounts**.
2. Pick the entity under **Legal entity**.
3. For a ready-made list, select **Import PH SME template**.
4. To add your own account, select **Add Account**. Fill in **Account Code** and **Account Name**, pick the **Account Classification Type**, and optionally a **Parent Account (Optional)**.
5. Tick **Allow direct journal entries (Postable)** if entries may be posted to it. Leave it off for a summary header. Select **Create Account**.
6. To rename or move an account, select it, edit, then **Save Changes**. **Mark as rollup** or **Mark as postable** changes its type.
7. For a postable account, tick the box beside it so it shows **Active** for the chosen entity.

Result

Accounts are grouped under five fixed classes. Postings use an account's activation for the entity, not the bare account.

Tips

- Example: a café adds 1010 Petty Cash Fund as postable, under a rollup header for cash.
- Class root accounts from the template show "type root - immutable" and cannot be deleted or moved.

Questions

Q: Why is Import PH SME template greyed out?

A: No legal entity is selected yet. Add one first, or write to support@evozo.ph.

Subscription invoice statuses

The status of each EVOZO subscription invoice for your organization, and what can happen to it.

Status	What it means	What can happen next	Who can move it
Pending	The invoice is issued and not yet paid.	Becomes Overdue when it passes its due date, or Paid when payment succeeds.	Paying: the owner (`tenant.billing`). The change to Overdue is automatic.
Overdue	The due date has passed and the invoice is still unpaid.	Becomes Paid when payment succeeds.	Paying: the owner (`tenant.billing`).

Status	What it means	What can happen next	Who can move it
Paid	The invoice is settled.	Nothing. A Paid invoice cannot be paid again.	No one.
Void	The invoice was cancelled and is not counted as billed.	Nothing.	EVOZO staff only.

Good to know

- Only Pending and Overdue invoices can be paid online. Any other status is refused with a message that the invoice cannot be paid online.
- Payment is confirmed by the payment provider; the invoice moves to Paid when that confirmation arrives.

See also: Billing overview (see Billing at a glance).

Organization & Settings: frequently asked questions

Settings FAQ

Common questions about Organization & Settings.

Questions

Q: Why can I not change the organization name or address?
A: Only an owner can change the name, address, tax details and bank accounts.

Q: I cannot save settings.
A: Saving needs tenant.settings.manage.

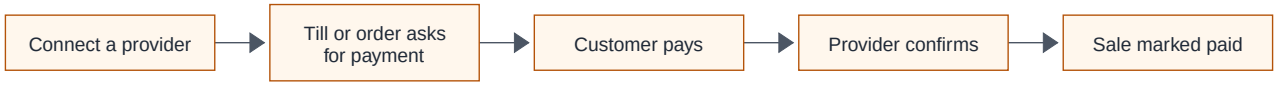
Q: Where do I set VAT?
A: Under **Tax & Financial Master**: **BIR 12% VAT Registered**, **VAT rate (%)** and **Prices include VAT**.

Payment Gateway

Payments at a glance

PARTIALLY AVAILABLE
Only Xendit can be connected today. The other providers are shown as coming soon.

Payments lets you connect your own payment provider so customers can pay by card, e-wallet or QR Ph, for example at a café till or on a hardware shop order.



Before you begin

- Your organization uses the Payments module.
- Connecting a provider needs the Payments Administrator role. Only an Owner can give a person that role. The Owner and Administrator may also hold it.
- You need your own account with the provider.

Key ideas

- A **provider** is the company that handles card and wallet payments for you. You choose one on the **Payments** screen.
- Each provider card shows whether it is set up and whether it is in sandbox (testing) or live mode.
- Money from these payments goes through your provider account, not through EVOZO.
- A direct refund through the provider is a separate permission from connecting it.

What you can do here

The menu has the **Payments** screen and, under Providers, **Xendit**, **PayMongo**, **Maya**, **GCash** and **Stripe**.

- Pick a provider and set it up.
- Use sandbox mode to test before going live.

What this module does not do yet

- Only **Xendit** can be connected. On its screen it covers cards, GCash, Maya and QR Ph.
- **PayMongo**, **Maya**, **GCash** and **Stripe** show a "Soon" badge. Opening one tells you the integration is not available yet.

Related

- Take payment (see Take payment)
- Payments to resolve (manager) (see Payments to resolve (manager))
- Refunds and returns (see Refunds and returns)
- First day setup (see First-day setup checklist)

- Getting help (see Getting help)

Set up Xendit

Connect your own Xendit account so your till can take QR Ph, card and e-wallet payments, for example at a café counter or a hardware shop.

Before you start

- You need your own Xendit account. Xendit requires your business to be registered with Xendit first, and EVOZO cannot do that for you. Registration and approval are between you and Xendit.
- Setting up needs the `payments.configure` permission. The Payments Administrator role holds it, and so do the Owner and Administrator. Everyone else can open the screen and look, but cannot change anything.
- Have the Xendit dashboard open in another tab.
- Start in sandbox (test) mode. See Sandbox or live (see Sandbox or live).

Steps

1. Open **Payments** in the menu, then **Xendit** under Providers.
2. Under **1. Your Xendit account**, pick the **Mode to set up**.
3. In the Xendit dashboard go to Settings, Developers, API keys. Copy the secret key and paste it into **Secret API key**.
4. Click **Save sandbox API key** (or **Save live API key** when you picked live). The key is encrypted and never shown again; the screen only says a key is saved.
5. Under **2. Webhooks**, copy the URL with **Copy** and paste it into the webhook field in Xendit for each event listed in the table. Switch on **Payment Session Completed** and **Payment Session Expired** (both required). **Refund request succeeded** and **Refund request failed** are recommended.
6. In Xendit, Settings, Webhooks, copy the verification token. Paste it into **Webhook verification token** and click **Save sandbox token** (or **Save live token**). Each mode has its own token.
7. Under **3. Test the connection**, click **Test connection**. A green line says Xendit accepted your key. It opens and cancels a PHP 100.00 payment link; nothing is charged.
8. Under **4. Create a test payment**, click **Create test payment**, open the page with **Open the payment page** and pay with a Xendit test method. The screen follows the payment until it shows Paid.
9. Make sure the switch beside the provider reads **Enabled**.

Result

The till shows **QR Ph** and **Card / e-wallet link** as payment methods. See Take payment (see Take payment).

Tips

- The **Setup progress** list shows which of the steps are done.
- Sandbox and live each keep their own key and webhook token, and saving one mode keeps the other. See Sandbox or live (see Sandbox or live).
- A sandbox key will not save under **Live (real money)**, and the screen tells you which prefix is expected.

- To replace a key or token, enter the new one and save. Leaving the key box empty keeps the saved key. **Remove sandbox token** or **Remove live token** deletes the saved token of that mode.
- Switching the provider off only stops new payments. Payments already made still settle and can be refunded.
- Your payments go through your Xendit account, not through EVOZO.

Questions

Q: Why is Create test payment greyed out?

A: It needs a saved webhook token for the active mode and the provider switched on. Without the token the payment could never be confirmed.

Q: The screen says I can only view this provider.

A: Your role does not include `payments.configure`. Ask an Owner.

Q: Can I connect PayMongo, Maya, GCash or Stripe?

A: Not yet. Those show as coming soon. Only Xendit can be connected today.

Q: I need more help.

A: Write to support@evozo.ph. See also Getting help (see Getting help).

Sandbox or live

Test your payment setup in sandbox mode with no real money, then switch to live when you are ready to take real payments.

Before you start

- Your Xendit connection is saved. See Set up Xendit (see Set up Xendit).
- You need the `payments.configure` permission to change the mode.
- Xendit gives you a separate key and a separate webhook token for each mode. Get the live key from your Xendit account once your business is registered with Xendit.

Steps

1. Open **Payments**, then **Xendit**.
2. Look at the line starting Active mode. It shows Sandbox or Live, and the list under it shows what is saved for each mode: not set up, key saved with the webhook token missing, or key and webhook token saved. The badge beside the provider name and the provider card on the **Payments** screen show the same mode.
3. Under **1. Your Xendit account**, choose **Sandbox / test mode** or **Live (real money)** in **Mode to set up**. This only chooses which mode you are editing; it does not change the active mode.
4. Paste the matching key into **Secret API key**. A sandbox key starts with `xnd_development_`. A live key starts with `xnd_production_`. Click **Save sandbox API key** or **Save live API key**.
5. Under **2. Webhooks**, paste that mode's token into **Webhook verification token** and click **Save sandbox token** or **Save live token**.
6. When both modes are saved, click **Switch to live** or **Switch to sandbox** beside Active mode. Run **Test connection** and **Create test payment** to check the new mode.

Result

New payments use the key and webhook token of the active mode. In sandbox, no real money moves. In live, customers are charged for real.

Tips

- Sandbox and live each keep their own secret API key and their own webhook token. Saving a key or token for one mode keeps the other mode's values, so you do not enter them again when you switch.
- **Switch to live** or **Switch to sandbox** stays disabled until the other mode has a key. The note under it tells you which key to save first.
- The screen never shows a secret. It only says a key or token is saved.
- Each payment remembers the mode it was created in. A refund or a status check on that payment uses the key of that mode, and a message from Xendit about it is checked with the token of that mode. Switching mode later does not affect payments already made.
- If the key does not start with the expected prefix, the screen shows a hint and the save button stays disabled.
- Do test sales in sandbox first, for example a PHP 100.00 test at the café till, before the shop opens.
- After going live, run one small real sale and check it under **Payments to resolve** if anything stays pending. See Payments to resolve (manager) (see Payments to resolve (manager)).
- Switching the provider off (the switch beside the provider name) only stops new payments. Payments already made still settle and can be refunded.

Questions

Q: Can I use my live key while Mode to set up says Sandbox?

A: No. The screen checks the prefix for the mode you picked.

Q: Does sandbox charge customers?

A: No. The test payment text on the screen says no real money moves in sandbox.

Q: Do I enter a webhook token for each mode?

A: Yes. Xendit gives test mode and live mode different tokens. Save each one under its own mode; both stay on file.

Q: I switched to live. What happens to a payment started in sandbox?

A: It is still checked, refunded and confirmed with the sandbox key and token it was created with.

What the customer sees

Know what your customer sees when they pay by QR Ph or by a card or e-wallet link, so you can guide them at the till.

Before you start

- Xendit is connected and switched on. See Set up Xendit (see Set up Xendit).
- The sale is open in the **Complete Checkout** window. See Take payment (see Take payment).

Steps

1. For QR Ph, click **Show QR Ph code**. The till shows the amount and a QR code, with the text **Waiting for the customer to scan and pay…**.
2. The customer opens their banking or e-wallet app, scans the code and confirms the exact amount shown.
3. For a card or e-wallet, click **Create payment link**. The till shows a QR code of the link and the link itself.
4. The customer scans it with their own phone, or you click **Copy link**, or send it with **Email to customer**. They land on a Xendit payment page and choose card, GCash or Maya there.
5. The customer enters card or e-wallet details on their own phone. Nothing is typed on the till.
6. When Xendit confirms, the till shows **Payment received.**

Result

The payment is added to the sale. If the customer does not finish in time, the till shows that the payment expired and nothing was charged to the sale.

Tips

- The payment page and QR code come from Xendit, not EVOZO. Their look can differ from what is described here.
- **Expires in** counts down on the till. A QR Ph code from Xendit has a fixed expiry that EVOZO cannot change.
- If the customer says they paid but the till says expired, see Payments to resolve (manager) (see Payments to resolve (manager)).
- A hardware shop can email the link to a customer who is not at the counter.

Questions

Q: The customer sees no payment options.

A: The channel may not be enabled on your Xendit account. Check with Xendit, or write to support@evozo.ph.

Q: Where does the money go?

A: To your own Xendit account.

After the customer pays

When a customer pays by card or e-wallet through a payment link or QR from the till, their phone ends on a short page. The page is the same for everyone and never shows the order or the amount.

What the customer sees

- **Payment received by the provider**, with the line "Payment received by the provider — please return to the cashier." This shows when the customer comes back from the payment page normally.
- **Payment not finished**, with the line "The payment did not go through — please return to the cashier." This shows when the customer cancelled on the payment page.

Both pages add: "The cashier's screen confirms your purchase. You can close this page."

There is no separate "pending" page. The first page does not say the order is paid. It only says the provider got the payment.

What to do at the till

1. Tell the customer to keep the phone aside and wait for you.
2. Watch the payment on your till screen. The sale is confirmed there, not on the phone.
3. If the customer saw **Payment not finished**, ask whether they want to try again. Create a new payment link or QR from the till if they do.
4. If the customer saw **Payment received by the provider** but the till has not confirmed it, wait a little. If it still does not confirm, see the page on payments waiting to be resolved.

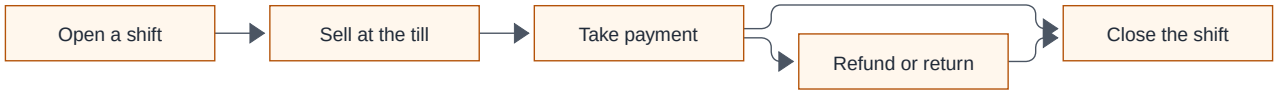
Tips

- Tell the customer they can close the page after reading it.
- Never hand over the goods because the phone says payment was received. Wait for the till.

POS Terminal

Point of Sale at a glance

Point of Sale is the till: you ring up what a customer buys at the counter, take payment and close the day with a shift report, for example at a café counter or a hardware shop front desk.



Before you begin

- Your organization uses the POS module.
- Your role must allow selling. A POS Cashier, a POS Supervisor, an Administrator or the Owner can.
- A terminal is set up for your till, and products with prices exist in the catalog. See First day setup (see First-day setup checklist).

Key ideas

- A **shift** is one cashier's session on a till. Sales happen inside an open shift.
- The **Till** is the selling screen. Items are added there and paid for.
- **Terminals** are the tills your organization has registered.
- **Quick Keys** are shortcut buttons for items sold often.
- A discount above a cashier's limit needs a POS Supervisor or higher to approve.
- How records work (see How records work) explains why a completed sale is corrected by a refund or return, not edited.

What you can do here

The POS menu has these screens: **Till**, **Terminals**, **Shifts**, **Orders** and **Quick Keys**.

- Open a shift, sell, take payment, and close the shift with its report.
- Give a refund or take a return.
- Supervisors: approve discounts and settle payments that are still to be resolved.
- Find past sales in **Orders**.

What this module does not do yet

- Online payments at the till are limited to a **Card / e-wallet link** and **QR Ph**, and they work only after you connect a provider. See Payments at a glance (see Payments at a glance).

Related

- Open a shift (see Open a shift)
- Sell at the till (see Sell at the till)
- Take payment (see Take payment)
- Discounts and manager approvals (see Discounts and manager approvals)

- Refunds and returns (see Refunds and returns)
- Close the shift and read the shift report (see Close the shift and read the shift report)
- Payments to resolve (manager) (see Payments to resolve (manager))
- POS questions and answers (see POS questions and answers)
- How records work (see How records work)
- Getting help (see Getting help)

The OMS Till app

The OMS Till is an Android app for selling from a phone or tablet, including when there is no internet. Install it from Google Play (the app is named EVOZO OMS Online; its package name is `com.evozo.oms.online`).

What it does

- Ring up sales, take payment and print or show a receipt.
- Keep selling when the connection drops. Sales are saved on the device.
- Send saved sales to EVOZO when the device is online again.
- Let each person sign in with their own EVOZO account, then with a personal PIN when offline.

How people get in

1. An administrator pairs the device once in **Identity & Access > Devices** (see Pair an OMS Till (see Pair an OMS Till and sign in for the first time)).
2. Each person signs in online once on that device and chooses a PIN.
3. After that, the PIN signs them in without internet, for up to 7 days after their last online sign-in.

Roles and permissions come from EVOZO. If you change a person's role in EVOZO, the device picks it up the next time that person signs in online.

Limits

- A person can use a PIN offline only for 7 days after their last online sign-in. After that they must sign in online.
- Five wrong PINs in a row block PIN sign-in until the person signs in online.
- A person who was removed in EVOZO, or a device that was revoked, is signed out the next time the device connects.
- Sales stay on the device until they sync. Do not uninstall the app while sales are waiting.

See Offline use, PINs and updates (see OMS Till offline use, PINs and updates) for details.

Pair an OMS Till and sign in for the first time

Connect a phone or tablet to your organization, then let each person sign in and choose a PIN.

Before you start

- The device needs internet for this setup.
- Install **EVOZO OMS Online** from Google Play on the device.
- The person pairing the device needs `iam.devices.manage` (administrators and owners have it).

Pair the device

1. On a computer, open **Devices** (`/iam/devices`) and select **Add device**.
2. Type a **Device Name**, then select **Generate QR Code**. The screen shows a QR code and, under it, a **pairing code** such as `K7MQ-2XHD` with a **Copy** button and a countdown. They last 5 minutes, work once, and are two ways to do the same thing.
3. Open the app on the device. On the **Device Provisioning** screen, either tap **Scan QR Code** and scan the code from the computer, or tap **Enter code instead**, type the pairing code (capital letters do not matter, the dash is added for you) and tap **Pair this device**.
4. Back on the computer, select **Done**. The device appears in the list as **Active**.

The app already knows which server to use. Only if your organization uses a different server, tap **Advanced** on the code screen and edit **Server** (it must be an `evozo.ph` address such as `demo.evozo.ph`).

First sign-in and PIN

1. On the sign-in screen, stay on **Sign in online** and sign in with your EVOZO account. A person's first sign-in on a device must be online.
2. On **Choose your PIN**, type a 4 to 6 digit PIN in **New PIN** and **Confirm PIN**, then tap **Save PIN**. The PIN stays on this device only. Each person sets their own.
3. Next time, with or without internet, tap **Use my PIN** and tap **Sign in with PIN**.

Pairing finishes after the settings download

Scanning the code is not the last step. The device then downloads the till settings. Only when that works is pairing finished. If it fails, the screen says "Pairing not finished — connect and tap Retry". Connect to the internet and tap **Retry**; you do not need a new QR code. Until pairing is finished, sales and opening a shift are blocked.

If something goes wrong

- The QR code or pairing code expired or was already used: generate a new one with **Add device**. A wrong, expired and used code all give the same message on purpose.
- "Too many pairing attempts": wait a few minutes and try again, or scan the QR code instead.
- "This device is no longer registered. Pair it again.": the device was revoked. Add it again as above.

OMS Till offline use, PINs and updates

How the OMS Till behaves without internet, and what to do about PIN lockouts and updates.

Offline PIN rules

- PIN sign-in works for 7 days after that person's last online sign-in. Every online sign-in starts the 7 days again.
- After 5 wrong PINs, PIN sign-in is blocked for that person until they sign in online.
- A person removed in EVOZO, or a revoked device, is signed out the next time the device connects.

When a person cannot sign in with their PIN

1. Take the device to a place with internet.
2. On the sign-in screen, tap **Sign in online** and sign in with the EVOZO account.

3. If asked, choose a new PIN on **Choose your PIN**.

Updates

- **New version available**: a banner at the top shows "New version available." with a short message. Tap **Update** to update, or **x** to dismiss it. Selling and syncing carry on as normal.
- **Update required**: a notice titled "Update required" appears when the app is older than the minimum supported version. It says: "You can keep selling offline. Your sales stay saved on this device and are sent after you update." Syncing is held until you update. Tap **Update on Google Play** to update, or **Keep selling offline** to close the notice and carry on selling. The notice comes back when the app starts and again every 4 hours while the app is still too old.
- The red bar: while the app is too old, a red bar stays at the top that reads "Update required — sales are not syncing", with an **Update** button. It cannot be dismissed. Closing the notice does not restart syncing. Only updating does.

Questions

Q: Will I lose sales if the app needs an update?

A: No. Sales stay on the device and sync after you update.

OMS Till catalogue, sync and offline limits

Where the OMS Till gets its products, and what happens when it has not synced for a long time.

Where the products come from

The till downloads its products, prices, barcodes and menu from EVOZO. There are no sample products on the device. A new till shows its products once it has synced for the first time. Set up products in EVOZO, not on the till.

The till refreshes this catalogue when the selling screen opens, then every 5 minutes while it is online, and whenever you tap **Sync now**.

When the till has not synced for a while

- After 24 hours: a banner reads "This till has not synced for over 24 hours. Prices and stock may be out of date." with a **Sync now** button. You can keep selling.
- After 7 days: a red message reads "New sales are blocked: this till has not synced for 7 days. Past sales can still be viewed." with **Sync now**. If you try to start a sale, the till says "New sales are blocked: this till has not synced for 7 days. Connect to the internet to continue."
- Past sales stay on the device and can still be viewed.

To get going again, connect the device to the internet and tap **Sync now**.

What needs a connection

Almost everything works offline. One thing does not: **cut-to-size items**. They are checked and sold on EVOZO's server, so that the same piece is never sold twice. Offline, the item's tile says **Needs connection** and it cannot be added. Everything else can still be sold offline. See Sell cut-to-size items on the OMS Till (see Sell cut-to-size items on the OMS Till).

Questions

Q: Why are there no products on a new till?

A: Products come from EVOZO. Connect the till to the internet and sync.

Q: Can I sell a cut-to-size item offline?

A: No. It needs a connection. The tile says **Needs connection** until the till is online.

Q: Will I lose sales that were made offline?

A: No. They stay on the device and are sent when it syncs.

OMS Till printers and barcode scanning

Connect a receipt printer to the OMS Till and scan barcodes while selling.

Set up a printer

1. In the app, open **Settings** (this needs the manage-settings permission).
2. Type a **Printer Name**, for example "Counter 1 Thermal Printer".
3. Choose a **Connection Standard**: Bluetooth, LAN Ethernet / Wi-Fi, or Wired USB.
4. In **Connection Address/IP/Port**, type the Bluetooth address, the IP address, or the USB product name.
5. Choose the **Thermal Paper Width**: 58mm or 80mm.
6. For LAN, type the **Subnet Prefix** (for example 192.168.1) and tap **Auto Detect Printers (port 9100)**, then tap a found printer to use its IP. For USB, tap **Auto Detect USB Printers**, then tap a found printer.

Scan barcodes

On the selling screen, tap **Scan** next to the search box, or type a product name or barcode in **Search products or scan barcode...**.

Find products on the OMS Till

Three ways to find a product on the selling screen.

The till menu

If a menu was set up for your till in EVOZO, it shows as tiles grouped by category. Each tile shows its label and price. Tap a tile to add that product to the sale. The menu and its quick keys come from EVOZO, so change them there.

Category filter

Tap **All Categories** or a category chip to narrow the product list. If nothing shows, the till says "Try adjusting your search or category filter".

Search and scan

- Type a product name or barcode in **Search products or scan barcode...**. An exact barcode adds the product.
- Tap **Scan** to use the camera. If the barcode is not in the catalogue, the till shows "Barcode not found". Nothing is added or created.
- If a barcode belongs to a pack or variant the till cannot sell, it shows "This pack or variant can't be sold on this till yet".

Cut-to-size items

A tile that says **Cut to size** opens a window to type the size instead of adding one piece. Offline it says **Needs connection**. See Sell cut-to-size items on the OMS Till (see Sell cut-to-size items on the OMS Till).

Questions

Q: "Barcode not found".

A: The product is not in this till's catalogue. Tap **Sync now** if a banner is showing, or ask a manager to add the barcode in EVOZO.

OMS Till reports at a glance

OMS Tills sell on their own and send their sales to EVOZO later. The OMS Till reports show what to check after that. Every sale is still posted. The reports only point out what a person should look at.

The four reports are tabs on one page, **OMS Till reports**:

- **Stock shortfall**: sales where the shelf had less than was sold. See OMS Till reports (see OMS Till reports).
- **Price variance**: sales where the price charged on the till differs from the EVOZO price. The price charged always stands.
- **Receipt series**: missing or repeated receipt numbers for each till.
- **Unverified payments**: card, wallet and bank payments typed in on a till, waiting for **Mark verified**.

The same page also has **Needs review** for items that could not be posted yet. Each tab is explained in OMS Till reports (see OMS Till reports).

To see why a till is behind, read OMS Till catalogue, sync and offline limits (see OMS Till catalogue, sync and offline limits). To see how a cut-to-size sale reaches these reports, read Sell cut-to-size items on the OMS Till (see Sell cut-to-size items on the OMS Till). To change how a till behaves, see Register, replace and revoke devices (see Register, replace and revoke devices).

Check the reports after a sync

1. Open **POS Terminal** > **OMS Till reports**.
2. Look at **Needs review** first and replay or dismiss what is waiting.
3. Open **Stock shortfall** and count the products with a gap.
4. Open **Price variance**, **Receipt series** and **Unverified payments** and clear what you can. Use **Mark verified** once you have seen the money.

OMS Till reports

Check sales that came in from OMS Tills and fix anything that needs a look. The page title is "OMS till sales".

Open it

1. Open **POS Terminal** > **OMS Till reports**. You can also open **Shifts** and select **OMS Till reports (sales to review, receipt series, unverified payments)**, or go to `/pos/oms-reports`. Use **Back to shifts** to return.

2. You need `pos.shifts.manage`. Without it you see "You do not have access to these reports."

The tabs

- **Stock shortfall**: sales where the shelf had less than was sold. The sale stands and the stock that existed was deducted. Columns: Product, Device, Sold, Receipt, Needed, Deducted, Gap. Empty list: "No stock shortfalls." These rows show here, not in the Stock Reconciliation Report. A kit sold before its recipe's **Effective from** date, or on a date between two versions, deducts its components using the current recipe, and the sale's notes say so. A non-stocked kit whose recipe has no usable lines, or that has no current bill of materials, shows here with the whole quantity as the Gap, because nothing could be deducted for it. A stocked kit with an empty recipe deducts its own stock.
- **Price variance**: the price charged on the till always stands. Shows Charged, EVOZO and Difference, and when the device last synced. Empty list: "No price differences."
- **Receipt series**: per till, the receipt numbers received, any "Missing" numbers and any "Repeated" ones. Every sale is still posted. This only shows what to check.
- **Unverified payments**: card, wallet and bank payments typed in on a till. When you have seen the money, select **Mark verified**. Empty list: "Every device payment is verified."
- **Drops to confirm**: cash a cashier moved from a till drawer to the safe (a **Cash drop**). Count what reached the safe, then select **Confirm** on the row. A window shows the drop and asks for the **Amount counted in the safe**, which is required and starts empty, and an optional **Note** (up to 500 characters). Select **Confirm drop**. The page says "The drop was confirmed." The confirmation is written to the audit log with your name and the time, and it cannot be changed or repeated. The list shows every drop that is not confirmed, with the dropped time, till, cashier and amount, and its status. **Unconfirmed** is a drop from today's business day. **Overdue** is a drop that was still not confirmed when its business day ended. The business day is your organization's own (its time zone in Settings), so a drop made at 23:59 and not confirmed turns Overdue at midnight in your time zone. EVOZO shows Overdue on the page only. It sends no message. If the count is different from the drop, it is still confirmed, and the window tells you the difference before you confirm. The drop then stays in the list as **Confirmed with variance**, with the counted amount, the variance (counted minus dropped), who confirmed it and the note, so the owner can follow it up. A drop confirmed with the exact amount leaves the list. A drop that is already confirmed cannot be confirmed again: EVOZO answers "This cash drop was already confirmed." You cannot confirm a drop you made or approved yourself (the cashier who took the cash out, or the manager who approved it, whichever way the till recorded them): **Confirm** is greyed out with "Another manager must confirm a drop you made or approved", and another manager confirms it. Confirming does not change the shift's expected cash. Empty list: "Every cash drop is confirmed."
- **Needs review**: items a till sent that could not be posted yet, with the reason. The Reason column shows a short label, then " - " and a detail. The labels, each meaning the item was booked and only needs a look: "Below cost — sold offline, no approval" (a line was really charged at or below its cost, counting the line's own discount and its share of any order discount; a Senior/PWD sale is measured by the listed price, as at the web till, so only a reduction beyond the legal one counts); "order discount exceeds lines" (the sale declares a bigger discount than its lines show: an over-declared or double-counted order discount); "approver unknown" (the approver is not a member of the organisation, or none was named); "approver tier insufficient" (the approver was not senior enough); "approver permission lost" (the approver lost the permission before the till synced); "price proposal not applied" (the price was not changed because someone else set it or it was edited since); "void shift unknown" (a void whose shift is not known); "void without approval"; "return above limit without approval"; "cash movement above limit without approval" (each above its approval amount with no manager, or with an approval EVOZO could not match); "approval not recorded" (the void, refund or cash movement names an approval EVOZO never received, or

none); "approval mismatch" (the approval is for another sale, action, kind, amount or person); "approval reused" (that approval was already used for another event); "approved offline" (the approval is valid, but the approver's PIN was entered on the till and EVOZO cannot check it, so a person should look: it applies to every refund above the refund approval amount, void and cash movement above its limit approved that way); "payments total mismatch" and "lines total mismatch" (a sale whose payments, or whose lines, do not add up to its total: a later return is refunded only up to what the sale received); "return amount exceeds sold" (the return claims more than the sold line is still worth: only the sold value is booked, and the expected cash follows it); "return shift unknown" (the return names a shift that is not this till's, is not known, or was already closed); "return credit exceeds bound" (a replacement sale was paid with more return credit than the bounded return it replaces, or with credit that return no longer has: only the credit a booked return backed counts as money the sale received); "return from flagged sale" (a return taken from a sale that was itself flagged "return credit exceeds bound" or "payments total mismatch": it is booked and a person should look at it); "return amount differs" (the refund differs from the returned lines); "shift figures differ" (the expected cash differs from EVOZO's figures). Fix the cause, for example link the device to a till, then select **Replay**. The page confirms "The item was posted." Replaying twice never posts twice. Empty list: "Nothing waiting for review."

A till return or void that will never be posted (for example the customer was paid back by hand, or the till sent it twice by mistake) can be dismissed instead: select **Dismiss**, type a reason of 5 to 500 characters and select **Dismiss without recording**. The window says the return will NOT be recorded. EVOZO books no return and moves no stock or money. The refund hold on the sale clears, so it can be refunded or returned from the web again. Dismissing is written to the audit log with your name, the time, the item, the sale and your reason, and it cannot be undone. The item stays in the list marked "Dismissed (not recorded)" with the reason, and it no longer has buttons. **Dismiss** shows on an open return or void only, including one the till sent in an unreadable form or that EVOZO could not save. A dismissed item cannot be replayed afterwards, and an item already posted by a replay cannot be dismissed: EVOZO answers that the item "was already resolved".

Questions

Q: Why does a drop show Overdue?

A: Nobody confirmed it before the end of the business day it was made in. Count the cash in the safe and select **Confirm** on the row. It stays Overdue until you do.

Q: What does a Gap mean?

A: It is how much of the sold quantity was not on the shelf in EVOZO. Check the stock and count it if needed.

Sell and take payment on the OMS Till

Ring up a sale on the OMS Till app. The first screen, OMS, is for finding products and adding them. Payment happens on the Checkout screen only.

Add products and go to payment

1. On the OMS screen, tap a product to add it, or tap **+ Bulk** (cards) or **Qty** (table) to type a quantity.
2. Check the cart. On a phone, tap **Cart** to open **Order Summary**.
3. Tap **Go to payment**. The **Checkout** screen opens.

The OMS screen never takes payment. If the cart is empty, Checkout says "Cart is empty" and **Back to OMS** takes you back.

Take payment

On **Checkout**, the **Payment** box shows **Total Due**, **Amount Paid** and **Remaining**.

1. Type the amount with the keypad, or tap **Balance** for what is left, or **PHP 100**, **PHP 500**, **PHP 1000**.
2. Tap **Add Cash** for cash. Change shows under **Change Due**.
3. Or tap **Manual Payment** for a payment taken outside EVOZO. Choose the type, type the **Amount (PHP)** and the **Reference Number (required)**, then tap **Add Payment**. It is recorded as "Not verified": a manager checks it later in the back office. A manual payment is the exact amount; change is only given on cash.
4. To split a payment, add more than one line, for example part cash and part manual. Tap x on a line to remove it.
5. When **Remaining** is zero, tap **Complete Sale**.

If the payments do not add up to the total, the till says so and does not complete the sale.

Senior Citizen and PWD

For each line, choose the Senior Citizen or PWD option instead of "No SC/PWD discount". Then type the **ID Number** and **Cardholder Name** under **Senior Citizen / PWD ID**. The ID number is needed to complete the sale. See Senior Citizen and PWD discount (see Apply the Senior Citizen / PWD discount) .

Prices

The till works out each price on the device from the price lists it last downloaded, as the EVOZO web till does:

- the customer's price tier, or the default tier when none applies;
- quantity breaks, packs and variants of the product;
- a product with no price cannot be sold until someone enters one: the till asks "enter the price" and a senior approver (owner or admin) must approve it. See Approvals on the OMS Till (see Approvals on the OMS Till).

Stock

Each variant shows its own available stock. Available stock is the stock the till last synced, minus what this till has sold since and not yet synced. If a sale needs more than is available, the till says "Not enough stock" and a manager can approve selling beyond the stock with their own PIN.

The receipt

- Receipt numbers look like `<branch code>-<terminal>-000001`. The branch code comes from the branch of the till. If the branch code changes, the till starts a new series.
- Under the business name and TIN the receipt prints the line "THIS DOCUMENT IS NOT VALID FOR CLAIM OF INPUT TAX." in bold.
- The TIN line reads "VAT Reg TIN" for a VAT-registered business and "Non-VAT Reg TIN" otherwise.
- The footer says "This is not an official receipt".

If something goes wrong

- "Pairing not finished": see Pair an OMS Till (see Pair an OMS Till and sign in for the first time).
- "New sales are blocked: this till has not synced for 7 days." Connect and tap **Sync now**. See OMS Till catalogue, sync and offline limits (see OMS Till catalogue, sync and offline limits).

- A discount asked for under one cart does not carry to a changed cart: the till asks for the approval again.

See also

- Quotation and discount settings (see Quotation and discount settings) for the organisation price rounding step that the till applies to per-item discounts.
- OMS Till reports at a glance (see OMS Till reports at a glance) for what to check after sales sync.
- Device types and per-till settings: Register, replace and revoke devices (see Register, replace and revoke devices).

Approvals on the OMS Till

Some things on the OMS Till need a second person. A window titled with the action (for example "Sell beyond the stock") shows what is being approved. Choose the approver under **Choose approver**, they enter their own PIN, then tap **OK** (or **Disapprove**).

Who approves what

- Cashier: a discount up to the cashier discount limit. No approval window appears.
- Manager: a discount up to the manager limit, selling beyond the stock, a refund above the refund approval amount, a void, and cash in or out of the drawer above its limit: the cash movement approval amount for an expense or the change fund, the cash drop approval amount for a cash drop (each counted per till per day).
- Owner or admin: a discount above the manager limit, and the price of a product with no price.

The limits are set in EVOZO under Organization & Settings > Sales & POS Policies. See Discount and approval settings (see Quotation and discount settings).

Offline

An approver's PIN works without internet only within 7 days of that approver's last online sign-in on this till. After that the window says "Their offline window (7 days since they last signed in online here) is over. They sign in online first."

Five wrong PINs lock that approver: "Too many wrong PINs. They sign in online to unlock." An approver who never set a PIN on this till sees "This person has no approval PIN on this device. They sign in online and set one."

One approval, one cart

An approval is good only for the cart it was given on. If you change the cart after an approval, for example add an item, the till asks again.

Approvals given offline are sent to EVOZO when the till syncs. See Set your approval PIN (see Set your approval PIN).

Approvals that EVOZO checks again

The approver's PIN is checked on the till only, so EVOZO cannot verify an approval that was given offline. A refund above the refund approval amount, a void, or a cash movement above its limit (the cash movement approval amount, or the cash drop approval amount for a drop) that was approved this way is still posted, and then it is marked for review as "approved offline" in OMS Till reports (see OMS Till reports) until a person has looked at it. This happens even when the approval is valid. Something at or below its limit needs no approval and is not marked. A void approval is checked against the sale that was actually voided: if the void names a different sale than the one it was matched to, it shows as

"approval mismatch".

Sell cut-to-size items on the OMS Till

Sell a piece cut from a bar or a sheet on the OMS Till app, and print the slip for the person at the saw. Cut-to-size items can only be sold while the till is online.

Before you start

- The product is set up in EVOZO as a cut-to-size item, with a cutting policy and a selling price.
- The till is online. Cut items are checked and sold on EVOZO's server so that two people never sell the same piece.
- A printer is set up on the till (see Printers and scanning on the OMS Till (see OMS Till printers and barcode scanning)).

Steps

1. On the selling screen, tap the cut-to-size item. Its tile says **Cut to size**.
2. In the cut window, type the **Length to cut**. For a sheet, also type the **Width to cut (sheets only)**. If the item has variants, pick one.
3. Wait a moment. The till asks EVOZO to check the cut and shows the cut size, the quantity, and the price each and for the cut. The price is EVOZO's price. You cannot type a different one here.
4. Tap **Add cut**. The cut is a line of its own in the sale, with its size under the name. A cut line has no plus or minus buttons: remove it with **x** and add the cut again if the size is wrong.
5. Go to payment and take payment as usual (see Sell and take payment on the OMS Till (see Sell and take payment on the OMS Till)).
6. When you complete the sale, the till sends the sale to EVOZO. Only when EVOZO accepts it, the till saves the sale, prints the receipt, and prints one cut slip for each cut line.
7. Give each slip to the person who cuts. The slip shows **Queued for cutting**, a barcode and the number, the item, the variant (if any), the cut size, the quantity, the order number with the customer name, and the date. It is the same as the slip printed from the web till.

When the till is offline

A cut-to-size item cannot be added without a connection. Its tile says **Needs connection**, and tapping it shows a message instead of the cut window. Other products can still be sold offline. If you lose the connection after adding a cut and before you complete the sale, the sale shows "Cut-to-size sales need a connection. Nothing was sold or printed; connect and try again." Connect and complete the sale again.

When the answer is lost ("Checking with EVOZO...")

If the connection drops after the till sent the sale, nobody knows yet whether EVOZO booked it. The till says **Checking with EVOZO... Do not re-ring this sale** and shows **Retry**. Nothing is printed yet, and the cart and the payments of that cut sale are locked, so it cannot be changed or rung again by mistake. The notice stays at the top of the checkout screen until EVOZO answers.

- Connect and tap **Retry**. The till sends the same sale, so EVOZO answers what it already has: one sale, one set of cut jobs. The receipt and the slips print once.
- The same happens after you close the app or restart the device. The sale waiting for an answer is shown again, with **Retry**.

- While it waits, you can keep ringing sales that have no cut item, online or offline. Only another cut-to-size sale has to wait until **Retry** gets EVOZO's answer.
- If EVOZO refuses the sale (for example the piece is gone), nothing was booked, the lock ends and you can change the cart.
- Keep tapping **Retry** when the connection is back. Do not ring the same sale again.

If EVOZO says the sale number is already in use, nothing was booked or printed and nothing of the other sale is shown. Ring the sale again from the start.

When a sale is booked and flagged

A cut sale goes through the same checks as every other till sale. If it was sold below cost, paid with a return credit that nothing backs, or the payments do not add up to the total, EVOZO still books it and flags it for a manager to review. The receipt prints as usual.

When EVOZO refuses the cut

If EVOZO cannot accept the sale, nothing is saved, no receipt prints and no slip prints. The cut line is marked in red with EVOZO's own message, and the payment you entered stays on the screen.

- Not enough in one piece. For example "only 4 ft are left in one piece". Someone else cut or sold the piece a moment ago. Tap **Check again** to see if the cut is still possible, or remove the line and add a smaller cut.
- The price changed. The line shows the new price and **Accept new price**. Tap it to sell at EVOZO's new price. The total changes, so enter the payment again if needed. Tell the customer first.
- Below the minimum cut. The message names the smallest cut allowed. Remove the line and add a larger cut.

The sale cannot be completed while a line is marked. After a refusal, nothing was sold: it is safe to try again.

Tips

- If the connection drops while you complete the sale, tap **Retry** on the "Checking with EVOZO..." notice. The till sends the same sale, so EVOZO never records it twice.
- A cut line is priced by EVOZO: the unit price and the line total must follow EVOZO's price (less the discount you gave). A sale that does not is refused with the price changed message. A product with no selling price cannot be cut and sold here.
- The cut material is held for the cutter as soon as EVOZO accepts the sale.

Questions

Q: Why does the tile say "Needs connection"?

A: The till is offline. Connect to the internet. Cut items are never sold offline.

Q: Can I change the price of a cut?

A: No. The price of a cut-to-size line is always EVOZO's price.

Q: The receipt did not print.

A: The receipt and slips print only after EVOZO accepts the sale. If a line is marked in red, the sale was not accepted. Fix the line and complete the sale again.

Returns, replacements, voids, cash in and out, and shifts on the OMS Till

Handle returns, voids, cash movements and shifts on the OMS Till app.

Returns, refunds and replacements

Tap **Cashier** at the bottom, open the **Sales Today** tab and tap a sale to see **Sale Detail**. Under the sale you can choose **Full Refund**, **Return** or **Replacement**.

- **Return**: tap **+ Select Item**, choose the item and its condition (**Good** or **Damaged**), then add it. You can only return what was sold, minus what was already returned. Type the **Reason for Return** and tap **Process Return**.
- **Full Refund**: choose each item's condition, type the **Reason for Full Refund** and tap **Process Refund**.
- The money goes back the way the customer paid. A refund above the refund approval amount needs a manager. The limit applies per sale: the money that earlier returns of the same sale already paid back counts with this one, so several small returns of one sale that together cross the limit need a manager too, and the manager's tier is judged on that total. The limit also follows a replacement chain: when a return is given as credit and that credit pays for a replacement sale, and that sale is returned in turn (A, then B, then C), the money paid back by every sale of the chain counts together, so moving value through credit and returning each replacement in cash cannot keep every refund under the limit. A return that takes the chain's total above the limit needs a manager, and the manager's tier is judged on the chain's total. A sale paid by a manual payment is refunded as cash.
- A return is never worth more than what is left of the sold line: its share of what the customer paid, minus earlier returns of that line. If the till sends more, EVOZO books only that value, keeps what the till claimed beside it, and the return shows in OMS Till reports (see OMS Till reports) as "return amount exceeds sold". The shift's expected cash follows the booked value, so the extra shows as a difference at the close. A refund above the refund approval amount is only approved when the manager's approval reached EVOZO for that refund; a reference EVOZO does not know, an approval for another action, an approver below the manager tier, or an approval already used for another return shows as "return above limit without approval". The refund is also never more than the sale actually received (what the customer paid, minus the change given back and minus earlier returns of that sale), even if the till's line totals are higher; the extra is not booked and shows as "return amount exceeds sold". Return credit that no booked return backs does not count as money the sale received, so it never raises what can be refunded, and a return taken from a sale flagged "return credit exceeds bound" or "payments total mismatch" shows as "return from flagged sale". A return that names a shift with no device on record must be on the same till as the device, or it shows as "return shift unknown". A refund above the refund approval amount whose approval is valid is still marked "approved offline" for a person to look at, because EVOZO cannot check the approver's PIN, which was entered on the till.
- **Replacement**: step 1 choose the items coming back, step 2 choose the replacement items, step 3 review. The value of the returned goods counts as credit, up to what the returned goods were sold for; a replacement paid with more credit than that is booked and flagged "return credit exceeds bound" in OMS Till reports. A replacement sale that was paid with credit is returned line by line from the OMS Till: it cannot be refunded whole from the back office, because the credit part is not money. If the new items cost more the screen shows **Collect from Customer** (choose **Collected Via**); if less, **Refund to Customer**.

- A return or void the server could not book stays under **Needs review** in OMS Till reports. While it does, the same sale cannot be refunded or have lines returned from the web (the till may already have paid the customer): resolve the review first.
- The history of returns shows under **Return / Refund / Replacement History**, with who approved.

Void a sale

On **Sale Detail** tap **Void sale**. A manager approves with their PIN, and that approval is used for this void only. EVOZO cannot check that PIN, so the void is posted and marked "approved offline" in OMS Till reports (see OMS Till reports) for a person to look at; if the approval is for a different sale than the one voided, it shows as "approval mismatch". A sale can only be voided in the shift it was made in and before the end of the day; after that, use a return. A sale that already has returns cannot be voided. The sale keeps its receipt number and shows "VOID: this sale was voided. It keeps its receipt number."

Cash in and out of the drawer

On Cashier Reports, with a shift open, use **Cash in / out of the drawer**: choose the reason (**Change fund**, **Expense** or **Cash drop**), type the **Amount** and a **Note**, then tap **Save cash movement**. A manager must approve when the amount goes above the limit. An **Expense** is judged against the **Cash in/out approval amount**. A **Cash drop** (cash moved from the drawer to the safe) has its own limit, the **Cash drop approval amount** (default PHP 10,000), and drops never count toward the expense total. Both are counted per till per business day, across every shift of that till that day: expenses already taken out of the till today, in any shift (a second shift opened beside the first, or a shift closed and opened again), count with the new one, so several small movements that together cross the limit need a manager too. The business day is your organization's own (its time zone in Settings). Every expense (or every drop) taken out in the shift you are working in counts with the new one, whatever date the till stamped on it. Movements of the till's other shifts count with it when they fall on the same business day, and a movement counts on two days: the day the till says it happened (kept between the start of its shift and EVOZO's own clock) and the day EVOZO received it. So everything that reaches EVOZO on one day adds up, however the till dated it. A movement the till dated before its shift began, or ahead of EVOZO's clock (more than ten minutes), is still posted but is marked **occurred_at_out_of_range** in OMS Till reports for a manager to look at. A shift the till says it opened after EVOZO's own clock is recorded as opened when EVOZO received it and is marked **shift_opened_at_out_of_range**. A change fund (cash in) is judged on its own amount against the cash in/out amount. The approval is for that kind and amount and is used once. The movement is posted, and marked "approved offline" in OMS Till reports because EVOZO cannot check the PIN that was entered on the till. The movement counts in the expected cash.

A **Cash drop** must also be confirmed by a manager once it reaches the safe. The manager counts the cash and confirms it on the **Drops to confirm** tab of OMS Till reports (see OMS Till reports). A drop that is not confirmed by the end of its business day (your organization's day, in its time zone) shows **Overdue** there. Confirming a drop does not change the shift's expected cash: the drop already lowered it when it was posted.

If you tick **This is to buy stock**, the till refuses: "Cash taken out to buy stock is a cash purchase: record it in Cash purchases (EVOZO back office), not here." See Bringing in stock without a purchase order (see Bringing in stock without a purchase order).

Open and close a shift

- Open: on the Opening Report (X-Reading) type the **Declared Opening Cash** and tap **Save Opening Report and Print**. This opens the shift. One shift at a time per till. If a second shift is opened on a till that still has one open, EVOZO keeps it but marks it for review as "shift already open", and the cash-out limits above still count the till's whole day, not each shift on its own. A cash

in/out or a close that names a shift of another till is refused: nothing is changed.

- Close: on the Closing Report (Z-Reading) type the **Actual Ending Cash in Drawer** and tap **Save Closing Report and Print**. The report shows the expected cash and the **Discrepancy**.
- If some sales have not reached EVOZO, the till warns "N sales are not yet synced. You can close the shift now: the close syncs after them." Tap **Close the shift anyway**. Closing is allowed.

Managers review anything that differs in OMS Till reports (see OMS Till reports).

Open a shift

Open a till shift to record your starting cash and start selling on a terminal.

Before you start

- You need permission to open shifts.
- Pick the right terminal in the **Terminal** list at the top of the screen.
- Count the cash in the drawer.

Steps

1. Open the POS screen.
2. Click the red **Shift Closed - Click to Open** badge at the top. (From the cart you can also use **Open shift**.)
3. In **Open Till Shift**, type the cash in the drawer in **Opening Cash Float**.
4. Click **Start Shift**.
5. The badge turns green and shows **Shift Open** with your name.

Tips

- The cashier is taken from your signed-in session. You do not type it.
- The shift tracks cash, card and QR sales for the session.
- If you see **Shift Closed** with no link, you do not have permission to open a shift. Ask a manager.
- If you see **Shift unavailable**, the terminal is not set up. The screen shows the reason.
- A terminal has one open shift at a time. If a shift is already open on it (here or on the OMS Till app paired to the same terminal), EVOZO does not open a second one here and tells you. An OMS Till that opens a second shift anyway is booked and marked for review as "shift already open".
- This screen has no cash in/out or cash drop. Those are recorded on the OMS Till app, where the expense and cash drop approval amounts apply per terminal per business day across every shift of that terminal, whichever app opened it. See Returns, replacements, voids, cash in and out, and shifts on the OMS Till (see Returns, replacements, voids, cash in and out, and shifts on the OMS Till).

Sell at the till

Add products to the cart, adjust the lines, then pay.

Before you start

- Open a shift first. Without one, the cart shows a message and an **Open shift** button.

Steps

1. To add by code, type or scan it in **Scan or type a barcode** and click **Add**.
2. To add by tapping, use the **Favourites** tab (your quick keys) or the **All products** tab.
3. On **Favourites**, search with **Search items or SKU...** or pick a category tab. **All Items** shows everything.
4. On **All products**, type a name, SKU, barcode or pack in **Search all products**. Narrow it with **Category**. Switch the **View** between **Table** and **Cards**.
5. Click a product. Some products ask one more question:
   - A list of variants: choose one. Then choose the pack or unit if asked. Use **Back to variants** to change the variant.
   - **Cut to size**: type the **Length** (and **Width** for two-dimension items), then click **Add cut**. The picker shows the quantity and price, and any minimum cut.
6. In the cart, use **-** and **+** to change quantity. For items sold by measure, type the quantity in the box.
7. To change a cut, click the cut size on the line, then **Save cut**.
8. Use **x** to remove a line, or **Clear All** to empty the cart.
9. To set a sale aside, click **Hold**. Held orders appear as **On Hold** at the top. Click one, then **Resume Order**.
10. Click **Pay** to take payment.

Tips

- If **Favourites** is empty, the screen offers **Set up quick keys**.
- Items without a price are not shown at 0.00.
- A product with no selling price, whether tapped, chosen in **All products** or scanned (including a pack, a leftover piece or a cut), shows **This product has no selling price. Enter a price to continue.** Type the price for one base unit, then get approval from an owner or admin: their PIN on this screen, or **Request approval**. A manager or cashier PIN is not enough. The approved price is saved as the product's selling price, and the item is added at that price. If someone else set a price in the meantime, the approved price is not used and the item sells at the price already set; add it again.
- Totals and tax are calculated by the server. If it fails, click **Retry** in the cart.
- Line warnings can appear when a price is below cost or margin is low. A cut that cannot be filled from stock shows a message.

Questions

Why is the product button grey?
You may not have permission to add items. The buttons need the ring-up permission.

Till order statuses

Every status a till order can have, what it means, and who can move it on.

Status	What it means	What can happen next	Who can move it
ACTIVE	The order is open on the till and being rung up or paid.	Hold, or pay in full (it becomes COMPLETED).	`pos.orders.create`

Status	What it means	What can happen next	Who can move it
ON_HOLD	Set aside. Any waiting gateway payment on it is cancelled.	Resume (back to ACTIVE; needs an open shift on the terminal)	`pos.orders.create`
COMPLETED	Fully paid; the sale is done.	Refund	`pos.returns.create` to refund
REFUNDED	The sale was refunded.	Nothing.	n/a
CANCELLED	The order was cancelled. No till action leads to this status today.	Nothing.	n/a

Payment status on the order

Payment status	Meaning
PENDING	Nothing paid yet.
PARTIAL	Some paid; a balance is left.
COMPLETED	Fully paid; the sale completes.
REFUNDED	Refunded.

For payments made through a gateway (such as QR Ph), see Gateway payment statuses (see Gateway payment statuses (QR Ph)).

Who can move it

Step	Permission
Ring up, hold, resume, pay	`pos.orders.create`
Refund	`pos.returns.create`

Gateway payment statuses (QR Ph)

The statuses of one online payment (for example a QR Ph code) taken at the till.

Status	What it means	What can happen next	Who can move it
PENDING	The code or link is shown and the till is waiting. The screen says "Waiting for the customer to scan and pay…" (or "…to pay on their phone…" for a link).	Becomes COMPLETED, EXPIRED, FAILED or CANCELLED	The customer pays; a cashier with `pos.orders.create` can cancel it
COMPLETED	The money is in. The payment counts toward the order.	None. A refund goes through the order's refund.	Set when the gateway confirms
EXPIRED	The customer did not pay in time.	Start a new payment	Set automatically by the system

Status	What it means	What can happen next	Who can move it
FAILED	The gateway reported a failure.	Start a new payment	Set automatically by the system
CANCELLED	Closed before payment: the cashier cancelled it, the order was put on hold, or the balance changed.	Start a new payment	Cashier (`pos.orders.create`) or the system

Good to know

- Some providers cannot cancel a QR Ph code: it can stay payable after the till closes it. If the customer pays anyway, it is recorded as a late payment for a manager to resolve.
- A late payment that cannot be refunded through the gateway (Xendit QR Ph) is returned in cash by a manager. Managers hold `pos.shifts.manage` or `payments.refund`.

See Till order statuses (see Till order statuses).

Take payment

Pay a sale with cash, a recorded outside payment, a QR Ph code, or a card or e-wallet link. You can mix methods.

Before you start

- Add items to the cart and click **Pay**. The **Complete Checkout** window opens.
- **QR Ph** and **Card / e-wallet link** appear only if your business has connected a payment gateway and switched it on. Cash and **Manual entry** are always there.

Steps

1. Check **Amount Due**, **Paid so far** and **Balance** at the top.
2. Pick a method tab.
3. **Cash**: type **Cash handed over (PHP)** or click **Exact** or a quick amount, then **Add cash payment**. **Change Due (cash)** shows if you took more than the balance.
4. **Manual entry**: use this for a payment taken outside EVOZO, such as a card terminal or e-wallet. Choose the **Type** (**Credit / debit card**, **E-wallet / QR** or **Bank transfer**), type **Amount received (PHP)** and the required **Reference**, then **Add manual payment**.
5. **QR Ph**: type **Amount to charge (PHP)** and click **Show QR Ph code**. The customer scans it.
6. **Card / e-wallet link**: click **Create payment link**. The customer pays on their own phone. You can **Copy link**, or type **Customer email** and click **Email to customer** if email is available.
7. To split a sale, add one payment, then add the next until **Balance** is 0. Remove an entered line with **x**.
8. Click **Confirm & Print Receipt**.

If a gateway payment does not finish

- The panel shows **Waiting for the customer...** and **Expires in** a countdown.
- Click **Check now** to look again, or **Cancel payment** to stop.
- If it ends as expired, cancelled or failed, a message appears. Nothing is charged to the sale for an expired payment. Click **Back to payment** and choose another method.

- If the customer paid after it expired, a manager resolves it. See "Payments to resolve".

Tips

- Once a payment is recorded, the sale is locked to finishing: take the rest of the balance.
- To finish a part-paid sale later, open **Orders** and click **Resume checkout**.
- If the screen shows **Resume checkout for order**, click **Resume checkout**.
- If gateways cannot load, the screen says so and Cash and Manual entry still work.
- Click **Check again** if the sale status is unconfirmed.

Discounts and manager approvals

Apply a discount to a line or the whole order, and get approval when it is above your limit.

Steps

1. For a line, click **Discount** on that line. To change a price, click **Override price**.
2. For the whole order, click **Order discount**.
3. For a Senior or PWD sale, switch on **Senior / PWD Discount (20%)**. Fill in **Customer name** and **Senior/PWD ID No.**; both are required before it applies.
4. Click **Pay**.
5. If the discount, price or cost needs approval, an approval window opens. Choose how to get approval:
    - **Supervisor PIN here**: pick who is approving under **Who is approving?**, then that person enters their own **Supervisor PIN**.
    - **Request approval**: a supervisor answers on their own device. Wait for the reply.
6. After approval, checkout continues.

Tips

- A Senior / PWD sale ignores line and order discounts.
- If the owner has set a price rounding step in Settings, the price of a discounted line is rounded to it (PHP 99 with 15% off becomes PHP 84.00 at a PHP 0.50 step). Quotations and sales orders follow the same rule. The order total, VAT and Senior / PWD amounts are not rounded.
- Approval belongs to the exact cart. If the cart changes, close the window and press **Pay** again.
- If nobody has set an approval PIN, the window tells you to use **Request approval**.
- The server checks the PIN, the approver and the cart. The till does not decide.

Refunds and returns

Refund a completed sale from the **Orders** page.

Steps

1. Open **Orders** (/pos/orders). The list shows orders of the active terminal.
2. Find the order with status COMPLETED and click **Refund**.
3. Check **Order**, **Amount** and **Payment method**.
4. Type **Reason for refund (required)**.

5. Read **How the money goes back**. It lists each payment, its amount and how it is returned. For each manual payment, type the **Refund reference (required)** (see below).
6. The window checks whether the refund needs approval. If it says **Above the refund limit: a manager must approve**, a manager chooses **Manager PIN here** and enters their PIN, or you ask for a remote approval.
7. Click **Confirm refund**. If it fails and can be retried, the button reads **Try again**.

A sale that already has returns (some of its lines were returned on an OMS Till) cannot be refunded whole here either: EVOZO says it already has returns, because the whole-sale refund would pay the customer for those lines twice. Return the lines that are left, one by one, from the OMS Till. If the whole sale was refunded here first, a later return of its lines from an OMS Till is not booked and shows in OMS Till reports as "return quantity exceeds sold".

A sale that was paid, in part, with return credit (a replacement sale made on an OMS Till) cannot be refunded whole here: EVOZO says it was paid with return credit. Return it line by line from the OMS Till, which pays the credit back as credit. See Returns, replacements, voids, cash in and out, and shifts on the OMS Till (see Returns, replacements, voids, cash in and out, and shifts on the OMS Till).

A sale with a return from an OMS Till that is still waiting for review (the till sent the return but EVOZO did not book it, so it shows under **Needs review** in OMS Till reports) cannot be refunded here, and none of its lines can be returned from the web, until that review is resolved. The customer may already have been paid back at the till, so a refund here could pay them twice. EVOZO says the return "is still waiting for review" and shows the message in the refund window. Nothing was changed, nothing was refunded and no manager approval was used up.

There are two ways to clear a held refund. Open **POS Terminal** > **OMS Till reports** > **Needs review** (see OMS Till reports (see OMS Till reports)), then either:

- **Record the return**: fix the cause and select **Replay** on that item. Use this when the customer really was paid back at the till.
- **Dismiss it without recording**: select **Dismiss**, give a reason (5 to 500 characters) and confirm. Use this when the return will never be posted, for example the customer was not paid at the till or it was settled another way. Nothing is recorded and no stock or money moves, only the hold clears. The dismissal and your reason go into the audit log.

When the replay posts the return, the hold is gone: the sale then has that return, so return its remaining lines one by one from the OMS Till. The hold also applies to a return that came from another till of the same organisation (it is matched by the sale, not by the till), and to a return the till sent in an unreadable form or that EVOZO could not save (an unreadable item cannot be replayed: dismiss it).

What the hold cannot do:

- A return that does not say which sale it belongs to (no sale reference at all) cannot be linked to the sale, so it cannot hold it. Check **Needs review** for returns and voids without a sale when a customer says they were already paid back.
- A return that arrives at the very moment you confirm a refund can still get through. If a customer tells you they were already paid at the till, look in **Needs review** first.
- Only a manager (POS supervisor, admin or owner) can replay or dismiss. Until the item is replayed or dismissed, the sale stays held; ask a manager if a return will never post.

After a dismissed till return: a different manager must approve

Dismissing a till return clears the hold, but it does not let the same person finish the job alone. For 24 hours after a manager dismissed a till return of a sale (counted by the server clock from the moment of the dismissal), a refund of that sale, or a return of some of its lines from the web, needs approval from a

different manager than the one who dismissed it. This applies at any amount, even below the refund approval limit.

- The refund window says that a different manager must approve, and names the manager who dismissed the return. Click **Confirm refund** and the approval step opens as usual. The manager who dismissed the return is not offered as an approver.
- If the person refunding is a manager other than the one who dismissed the return, they can approve it themselves. If they are the manager who dismissed it, they must ask another manager.
- If an approval from the manager who dismissed the return is used anyway, EVOZO refuses with "A different manager must approve this refund" (409). Nothing was changed and the approval is not used up, so a different manager can still approve.
- After 24 hours the usual rules apply again: only a refund above the limit needs a manager, and any manager can approve it.
- The refund's audit entry names the dismissal it follows: the item, who dismissed it, when, and the reason they gave. Returns taken at an OMS Till are never held by this rule.

A till refund returns the money only. It does not put the items back into stock; adjust stock separately if the goods come back.

How each payment type is returned

- **Cash**: paid back as cash. It is counted against the shift.
- **Manual entry** payments (card terminal, GCash or Maya with a reference) were taken outside EVOZO, so the money is returned outside EVOZO too (for example a reversal on the card terminal or a transfer back).
- **Gateway** payments (QR Ph, card / e-wallet link): refunded through the gateway. For some QR Ph gateways this is not possible, so the money is returned in cash.

Refund reference for manual payments

When an order was paid by manual entry (card terminal, GCash or Maya with a reference), the money goes back outside EVOZO. The refund window shows each of these payments under **How the money goes back**, with the line "Outside EVOZO (card terminal reversal or transfer)".

1. Reverse the payment on the card terminal, or send the transfer back.
2. In the refund window, find the field **Refund reference (required)** under that payment. The hint says "Terminal reversal code or transfer reference".
3. Type the code from the reversal or the transfer reference, for example the reversal code printed on the terminal slip. Use one line, at most 64 characters.
4. If the order has two manual payments, type one reference for each.

The refund cannot be sent until every manual payment has its reference. Cash and gateway payments do not ask for one.

Messages you may see

- **Enter the refund reference for each card, e-wallet or transfer payment.** A reference is missing. Fill in every **Refund reference (required)** field and click **Confirm refund** again. Nothing was refunded yet.
- The refund reference must be one line of at most 64 characters. Shorten the reference and remove line breaks, then send again.
- **A manager must approve this refund.** Get a manager approval (step 6), then send again.

- **A different manager than the one who dismissed it must approve this refund.** A till return of this order was dismissed less than 24 hours ago. Ask another manager to approve (see above). Nothing was refunded.
- **The system is busy, please try again.** Click **Try again**.
- **The payment provider refused the refund.** The gateway did not accept it. The order is unchanged. Ask a manager.
- **This order was already refunded or can no longer be refunded.** Check the order in **Orders**.
- **A return of this order taken at the till is still waiting for review.** Resolve the till return in **OMS Till reports** first (see above). Nothing was refunded.
- **You are not allowed to refund orders.** You need the return permission.
- **Your session has expired - sign in again.** Sign in and start the refund again.

After the refund

In **Orders**, the refunded order shows **Refund details**. Each refunded payment has a line with:

- what was paid (for example Cash, Card, E-wallet / QR, Bank transfer, Online payment) and the amount;
- how it was returned, for example "Cash returned from the drawer", "Returned to the customer's card or e-wallet through the gateway" or "Returned outside EVOZO (card terminal reversal or transfer)";
- **Refund reference:** and the reference you typed, for manual payments.

Tips

- Only COMPLETED orders show **Refund**.
- Refunds need the return permission.
- A late gateway payment that needs money back is handled by a manager. See "Payments to resolve".

Close the shift and read the shift report

Count the drawer, close your shift, and read the totals by payment method.

Steps

1. On the POS screen, click the green **Shift Open** badge.
2. In **Close Till Shift**, read the totals: **Opening Float**, **Cash Sales**, **Card Sales**, **QR Sales**, **Bank Transfer Sales**, **Gateway Sales (QR Ph / link)** and **Cash Refunds**.
3. **Expected Closing Cash** is worked out by the server: the opening float plus the cash taken, less the change given and any cash refunds. It shows a dash until the server answers.
4. Count the drawer and type it in **Actual Cash Count (PHP)**. The screen asks the server again when you leave the field.
5. **Discrepancy** is the server's figure for the count you typed (a dash until it answers). Negative is short, positive is over. It is the same figure the close then saves.
6. Add **Notes / Explanations** if needed.
7. Click **End & Close Shift**.

Read the report

1. Open **Shifts** (/pos/shifts). Use **Terminal**, **Status**, **From** and **To**, then **Apply**.
2. The table shows **Opening float**, **Expected cash**, **Counted cash**, **Over / short** and **Sales by payment method**.
3. Click **Report** on a row for the full report, then **Print** if needed.

Tips

- You can close only a shift you opened yourself. To close a shift another cashier opened, you need the permission `pos.shifts.manage`, which the owner, admin and POS supervisor roles have. The manager uses **Close shift** on the row in the Shifts table. These show **by a manager**.
- Times are shown in the business time zone.
- Closing a shift and opening another does not reset the day's cash-out totals. Expenses and cash drops recorded on the OMS Till app are judged against their approval amounts per terminal per business day, across every shift of that terminal, whichever app opened it. See Open a shift (see Open a shift).

Set up a till terminal

Add, rename, move and switch off the till terminals your cashiers sell from.

Before you start

- You need the permission to manage terminals. Without it you can still see the list, but not the **Add terminal**, **Edit** and **Deactivate** buttons.
- Decide the branch each till belongs to, for example a hardware shop's counter and its yard till, or a café's front and drive-through tills.

Steps

1. Open **Terminals** (/pos/terminals). The table shows **Name**, **Code**, **Branch**, **Status** and **Current shift**.
2. Click **Add terminal**.
3. Type the **Name** (up to 100 characters), for example "Counter 1".
4. Leave **Code** empty to have one generated, or type your own (up to 32 characters in the form). The server accepts 1 to 40 letters, digits, dots, underscores and hyphens.
5. Pick the **Branch**. Leave it on **Default branch** if you have only one.
6. Click **Save**.

To change a terminal, click **Edit** on its row, change the fields and click **Save**. The branch list then offers **Keep current branch**.

To stop a till being used, click **Deactivate** on its row. The status shows **Inactive**. Click **Activate** to turn it back on.

Result

The terminal appears in the table. **Current shift** reads "No open shift" until a cashier opens one (see Open a shift (see Open a shift)), then shows the cashier and the start time.

Tips

- A code is unique per organization, ignoring upper and lower case. If another terminal already uses it, the server refuses the save and names that terminal.
- Status can also read **Maintenance** for a terminal set that way elsewhere.
- Times on the page are in your organization's time zone.

Questions

Q: I cannot see Add terminal.

A: Your role does not include terminal management. Ask an owner or admin.

Q: Which terminal's orders does the Orders page show?

A: The active terminal. See The POS Orders page (see The POS Orders page).

Apply the Senior Citizen / PWD discount

Give a Senior Citizen or PWD customer the VAT exemption and 20% discount at the till, and see exactly how the total is worked out.

Before you start

- Open a shift and add the items to the cart (see Sell at the till (see Sell at the till)).
- Ask the customer for their name and Senior/PWD ID number. Both are required.
- Anyone who can ring up sales at the till (permission `pos.orders.create`) can switch this discount on. There is no separate permission for it.

Steps

1. On the POS screen (/pos), in the cart, switch on **Senior / PWD Discount (20%)**.
2. Type the customer's name in **Customer name (required)**.
3. Type the card number in **Senior/PWD ID No. (required)**.
4. Until both are filled in, the cart shows "Enter the customer's name and ID number to apply the discount." and nothing is applied. Pay waits.
5. Check the summary: **Subtotal**, **VAT Exempt Sales**, **Senior/PWD Discount (20%)**, then take payment as usual (Take a payment (see Take payment)).

How the total is worked out

The server does the sums, not the screen. For a VAT-registered business:

1. Net sales = subtotal / 1.12, rounded to 2 decimals. This is the **VAT Exempt Sales** amount.
2. Discount = net sales x 20%, rounded to 2 decimals.
3. Total = net sales - discount. VAT is 0.

Worked example (hardware shop): 1 cordless drill at 1,680.00.

Line	Working	Amount
Subtotal		1,680.00
VAT Exempt Sales	1,680.00 / 1.12	1,500.00
Senior/PWD Discount (20%)	1,500.00 x 0.20	300.00

Line	Working	Amount
Total	1,500.00 - 300.00	1,200.00

If the business is not VAT-registered (the cart shows **Non-VAT**), there is no 1.12 step: the discount is 20% of the subtotal. A 1,000.00 order gives a 200.00 discount and a total of 800.00.

Result

The sale is saved as a Senior/PWD sale with the customer's name and ID number. It is counted on the shift report under **Senior/PWD orders**, **Senior/PWD discounts** and **Senior/PWD VAT exempt** (Shift report figures (see What the figures on the shift report mean)). The discount is also written to the audit trail.

Tips

- A Senior/PWD sale ignores line discounts and order discounts. The cart tells you: "A Senior/PWD sale ignores line and order discounts."
- If the server refuses, the cart says "Senior/PWD not applied" and what is missing. Names are at most 120 characters, ID numbers at most 64.
- Other discounts and manager approval are in Discounts and approvals (see Discounts and manager approvals).

Questions

The discount did not appear. Both the name and the ID number must be filled in. A walk-in placeholder is not accepted as a name.

Who sets the 20%? It is fixed in the server; it is not a setting on this screen.

Still stuck? support@evozo.ph

Payments to resolve (manager)

Handle gateway payments that arrived late or while no shift was open.

Before you start

- You need the shift management or the gateway refund permission to see the page. Assigning to a shift needs shift management.

Steps

1. Open **Shifts**, then click **Payments to resolve (refunds and payments waiting for a shift)**.
2. **Needs refund**: the customer paid after the payment expired, was cancelled or the sale was closed. The money must go back.
    - If the row shows **Refund via gateway**: click it, type the **Reason (required)**, then **Refund**.
    - If it shows **Returned in cash**: click it, type the **Reason (required)**, choose the open shift under **Paid back from shift (required)**, then **Record cash returned**. If no shift is open, open one first.
3. **Waiting for a shift**: the customer paid while no shift was open. Click **Assign to a shift**, choose an open shift, then **Assign**.

Tips

- The list says **Nothing to refund.** or **Nothing is waiting.** when empty.
- Assigning needs an open shift on the payment's terminal.

Quick keys

Put your best sellers on one-tap tiles on the till grid.

Before you start

- You need the permission to manage quick keys. Without it the page is read-only.
- The product must already exist in your catalogue. For example a café's "Iced latte" or a hardware shop's box of 3 inch screws.

Steps

1. Open **Quick Keys** (/pos/quick-keys). The subtitle reads "Tiles shown on the POS terminal grid." Use **Back to POS** to return to the till.
2. Click **New quick key** (or **Add quick key** on an empty list).
3. Under **Product**, choose the product. This cannot be changed later.
4. If the product has variants, choose one under **Variant (optional)**, or leave "Any / base product".
5. If the product is sold in packs, **This key sells** lets you pick the pack. The price is then for one whole pack.
6. Type the **Label** (up to 60 characters) shown on the tile.
7. Pick a **Category**, or click **New category**, type the **Category name** and click **Add**.
8. Optional: **Price override (optional)**. Leave it empty to use the catalogue price.
9. Pick a **Color** swatch.
10. Click **Create quick key**.

To change a tile, click **Edit** and **Save changes**. To hide it without losing it, switch off **Active** in its row. **Delete** asks "Delete quick key?" and cannot be undone.

Result

The tile shows on the till. The table lists its colour, label, product, category and price. A price set by hand carries the tag **override**.

Tips

- A price that was set before approvals were recorded shows **Re-save to approve**. A manager opens **Edit** and saves it again.
- To use another product, delete the key and create a new one.
- If the list fails to load, click **Retry**.

Questions

Q: My tile price differs from the catalogue.

A: It has a **Price override (optional)**. Clear it and save to use the catalogue price.

End-of-day cash reconciliation

Count the drawer at the end of the day, find out whether it is over or short, and close the shift, yourself or as a manager.

Before you start

- The shift must be open. Finish or resolve pending payments first (Payments to resolve (see Payments to resolve (manager))).
- Take the cash out of the drawer and count it, leaving the float for the next shift only after you have recorded the count.
- The screen steps are in Close the shift (see Close the shift and read the shift report). This page explains the numbers.

Steps

1. Click the **Shift Open** badge on /pos to see **Close Till Shift**.
2. Note **Expected Closing Cash**.
3. Count the drawer and type the total in **Actual Cash Count (PHP)**.
4. Read **Discrepancy**. Negative is short; positive is over.
5. Explain it in **Notes / Explanations** if it is not zero.
6. Click **End & Close Shift**.

How expected cash is worked out

Expected cash = opening float + cash received - change given - cash refunds. Over / short = counted cash - expected cash.

Worked example (café): float 2,000.00, cash received 9,500.00, change given 500.00, cash refunds 300.00. Expected cash is 2,000 + 9,500 - 500 - 300 = 10,700.00. You count 10,650.00, so the shift is short by 50.00 (shown as -50.00). Card, QR, bank transfer and gateway money are not in the drawer, so they are not part of this sum.

Manager close

If a cashier left a shift open, a manager with `pos.shifts.manage` opens **Shifts** (/pos/shifts) and clicks **Close shift** on the row.

1. Read **Opening float** and **Expected cash in the drawer**.
2. Type **Cash counted (required)**. The dialog shows **Exact**, **Over** or **Short** with the amount.
3. Add a **Note (optional)** and click **Confirm and close shift**.

A closed shift cannot be reopened. It is marked **by a manager** in the table and on the report.

Result

The shift is closed with its counted cash and over / short saved. Open the **Report** from /pos/shifts to print it (Shift report figures (see What the figures on the shift report mean)).

Tips

- Recount before closing when the figure is far off; the count is final.
- Times show in the business time zone.

Questions

The expected cash looks wrong. Check cash refunds and late cash returns on the report. See Trouble with a till shift (see Troubleshoot - the till will not open or close a shift).

I cannot see Close shift. Your role needs `pos.shifts.manage`. Closing a shift another cashier opened is for a manager.

Contact support@evozo.ph for anything else.

Print cut slips for cut-to-size items

Print the slip that tells the person at the saw what to cut for a sale you just completed.

Before you start

- The sale has at least one **Cut to size** line (see Sell at the till (see Sell at the till)).
- You have taken payment. The slips appear on the screen that opens after the sale is complete.

Steps

1. Sell the item as a cut. For example, 2.4 m of a steel angle bar: type the size in the cut picker and click **Add cut**.
2. Click **Pay** and finish the payment as usual.
3. On the completed-sale screen, find one slip per cut line. Each slip shows **Queued for cutting**, a barcode, the work order number, the item name, the variant (if any), the cut size, the quantity, the order number with the customer name (if any) and the date.
4. Click **Print cut slip** on the slip you want. Your browser's print window opens. Print it.
5. Give the slip to the person who cuts. They scan the barcode or read the work order number.

Result

- Every cut line gets its own slip and its own work order number. A sale with three cut lines shows three slips.
- A line that is not a cut (a full pack, a loose item) gets no slip.
- The receipt shows the cut lines as queued for cutting.

Tips

- The barcode is a plain Code 39 barcode of the work order number.
- A slip only appears for a line that already has a work order number from the server. If a cut line shows no slip, tell your manager.
- Print the slip before you leave the completed-sale screen. A cut slip cannot be reprinted yet: no other screen shows it again.

Questions

Q: I do not see a cut slip.

A: Check that the sale really had a cut line. Packs and loose items do not get slips. If it did, write down the order number and contact support@evozo.ph.

Q: Can I reprint a cut slip later?

A: No. Cut slips can only be printed from the completed-sale screen, and no screen reprints them yet.

Q: Can I print the slip on the receipt printer?

A: The button uses your browser's print window, with receipt-width styling. Pick your receipt printer in that window.

The POS Orders page

See the orders of your till and finish or refund them.

Before you start

- Select a terminal on the till first. The page lists the orders of the active terminal only.
- Refunding needs the return permission. Resuming a checkout needs permission to create orders.

Steps

1. Open **Orders** (/pos/orders).
2. Read each row: **Order** (the order number), **Status**, **Total** and **Actions**.
3. For an ACTIVE order that already has money recorded, click **Resume checkout** to finish taking payment. See Take a payment (see Take payment).
4. For a COMPLETED order, click **Refund**. See Refunds and returns (see Refunds and returns).
5. A REFUNDED order shows **Refund details** under its row.

Result

Resuming a checkout completes the sale from the same order. A refunded order moves to REFUNDED and lists how each payment went back.

Tips

- Example: a customer at a café paid part of the bill by card, then the screen froze. **Resume checkout** lets you finish the same order instead of ringing it again.
- If nothing is listed you see "No orders yet."
- A load problem shows a red message; reopen the page to try again.
- The page has no reprint button. Receipts are shown at checkout; see Receipts and printing (see Receipts and printing).

Questions

Q: Why is there no Refund button on my order?

A: Only COMPLETED orders show it, and you need the return permission.

Receipts and printing

What a till receipt shows, and how to print it.

Before you start

- Complete a sale first. See Take a payment (see Take payment).
- Your business name, address, phone and TIN come from your organization's profile. If they are empty, those lines are left off the receipt.

Steps

1. After the sale, the **Receipt Preview** window opens. (If your organization sells in Ordering System mode, the title is **Order Slip Preview** and the document is an order slip, not a receipt.)
2. Check the preview.
3. Click **Print Thermal Receipt** (**Print Order Slip** for a slip). The browser print window opens.
4. Click **Close** when done.

Result

A receipt lists, from the top:

- the header text, business name, address and phone, if set;
- the TIN line, labelled **VAT Reg TIN:** for a VAT-registered organization and **Non-VAT Reg TIN:** for any other. A non-VAT sale also prints "Non-VAT";
- in bold: "THIS DOCUMENT IS NOT VALID FOR CLAIM OF INPUT TAX.";
- **Receipt #**, **Date**, **Customer** ("Walk-in Customer" if none) and, for a Senior/PWD sale, the **Senior/PWD ID**;
- each item with quantity and price, cut size and recipe components where they apply;
- **Subtotal**, **VAT Exempt Sales** and **VAT (12%)** (VAT-registered only), any discount, and **TOTAL DUE**;
- each payment (CASH, CARD, E-WALLET/QR, BANK TRANSFER, QR PH and so on) with its reference, and **Change** for cash;
- the footer text, if set.

An order slip shows the same input-tax sentence, no VAT breakdown, and ends "This is not an official receipt".

Tips

- Example: a hardware shop selling a 600 x 900 mm cut panel sees "Cut 600 x 900 mm" under the item.
- Only completed payments print. A waiting, failed or cancelled gateway payment does not.
- The header and footer come from the organization's receipt header and footer settings. They cannot be changed on screen yet.
- There is no receipt reprint button in the till or on the Orders page today. Print before you close the preview.

Questions

Q: Why does my receipt say Non-VAT Reg TIN?

A: The sale was made as a non-VAT sale, so the label follows the order's tax mode set when the sale was made.

Q: A printer problem happened. Is the sale lost?

A: No. The sale is already recorded. Check the order in The POS Orders page (see The POS Orders page) or write to support@evozo.ph.

Set your approval PIN

Set the 6-digit PIN you use to approve a cashier's discount at the till.

Before you start

- Your account needs a password. An account that signs in with Google only must set a password first.
- Have your password ready. If two-factor sign-in is on for your account, also have your authenticator app.
- There is no shared PIN. Each approver sets their own, and the approval is recorded against your name.

Steps

1. Open **Identity & Access**, then **Account**. Find the card **Your approval PIN**.
2. Click **Set a PIN**. If you already have one, the button reads **Change PIN**.
3. Type **New PIN** and repeat it under **Confirm PIN**.
4. Type **Your current password**. If asked, type the **Authenticator code**.
5. Click **Save PIN**.

Result

- The card says **Your approval PIN is saved.** and shows the date it was set.
- At the till, your name now appears under **Who is approving?** when a cashier needs approval (see Discounts and manager approvals (see Discounts and manager approvals)). The cashier picks your name from that list, and you then type your own PIN.

Tips

- The PIN is exactly 6 digits. The server refuses an obvious PIN such as repeated digits or a run like 123456.
- Nobody can read your PIN, not even an owner or admin.
- Five wrong PINs in a row lock your PIN for 15 minutes. The card shows the lock time.
- Do not share it. If you forget it, ask an owner or admin to click **Reset approval PIN** on your row under **Users**, then set a new one.
- A PIN only lets you approve if your role allows approving discounts. Owners, admins, Sales Managers and POS Supervisors can approve a discount above the cashier limit. Only owners and admins can approve beyond the manager limit.
- Example: a hardware-store manager sets a PIN once, then approves a contractor's 10% discount at the counter in seconds.

Questions

Q: The card says "Not set. You cannot approve discounts yet."

A: You have no PIN yet. Follow the steps above.

Q: I cannot open Account.

A: The screen needs the permission to view members, or an owner or admin role. Ask your owner or admin.

Q: Who do I contact if it still fails?

A: support@evozo.ph.

Troubleshoot - the till will not open or close a shift

Use this page when opening or closing a till shift is refused.

The message you see

```
Terminal '...' already has an active open shift (ID: ...)
Only a manager can close a shift another cashier opened
Till Shift '...' is already closed
Till Shift '...' not found
```

Why it happens

Code	Why
`ERR_TILL_SHIFT`	The till (terminal) already has an open shift, so a second one cannot start.
`ERR_SHIFT_MANAGER_REQUIRED`	You tried to close a shift that another cashier opened, and you do not hold the shift-management permission.
`ERR_SHIFT_ALREADY_CLOSED`	The shift was already closed, perhaps by another person or on another screen.
`ERR_SHIFT_NOT_FOUND`	The shift does not exist for this organization.

What to do

1. For an open shift: continue it, or close it first. See Close the shift (see Close the shift and read the shift report).
2. To close another cashier's shift, ask a manager.
3. For a closed shift, open a new one: Open a shift (see Open a shift).
4. If the shift cannot be found, check the organization you are in. Then see Getting help (see Getting help).

Who can fix it

A manager can close shifts others opened. See POS overview (see Point of Sale at a glance) and How records work (see How records work).

What the figures on the shift report mean

A line-by-line explanation of every figure on the shift report.

Before you start

Open **Shifts** (/pos/shifts), find the shift and click **Report**. For a shift still open the heading reads "Shift report (shift still open, running figures)"; after closing it reads "Shift close-out report". The header shows the terminal, who opened it, and who closed it (with **(closed by a manager)** if forced).

Cash

Label	Meaning
Opening float	Cash in the drawer when the shift opened.
Cash received	Cash handed over by customers (before change).
Change given	Change handed back.
Cash refunds	Refunds paid out of the drawer in cash, including late payments a manager returned in cash from this shift.
Expected cash	Opening float + cash received - change given - cash refunds.
Counted cash	What was counted at close. Shown only once closed.
Over / short	Counted - expected. Negative is short. Shown only once closed.

Sales

Label	Meaning
Orders	Number of sales in the shift.
Sales	Total of those sales.
Discounts	Total discount on those sales.
Refunds	Count and total of refund orders.
Net sales	Sales - refunds.
Senior/PWD orders	Number of Senior/PWD sales (how it works (see Apply the Senior Citizen / PWD discount)).
Senior/PWD discounts	Discount given on those sales.
Senior/PWD VAT exempt	VAT-exempt amount on those sales.

Payments by method

One row per method: **Cash**, **Card**, **E-wallet / QR**, **Bank transfer**, **Gateway (QR Ph / link)**. Columns:

- **Payments**: how many payments.
- **Received**: money taken.
- **Refunded**: money returned by that method.
- **Net**: Received - Refunded.

A row may add "(gateway ...)" for money that came through the payment gateway, or "(manual ...)" for non-cash payments recorded by hand.

At the bottom: an optional **Note:** (the close note) and **Generated** time. Times use the business time zone.

Result

You can match each figure to the drawer count and the day's sales.

Tips

- Refunds follow how the money went back: only a cash refund reduces expected cash.
- Print with **Print** on the report.

Questions

Why is Counted cash missing? The shift is still open.

Not matching? See End-of-day reconciliation (see End-of-day cash reconciliation) or write to support@evozo.ph.

Troubleshoot - a payment is refused or stuck

Use this page when taking a payment is refused or a payment sits unresolved.

The message you see

```
At least one payment is required
This shift was closed. Open a new shift to take payment.
The shift is not open
Only a late gateway payment flagged for refund is refunded here
```

Why it happens

Code	Why
`ERR_PAYMENT_INVALID`	The payment was empty or an amount was missing, not a number, or not more than 0. The message names the problem.
`ERR_SHIFT_CLOSED`	The order's shift was closed before payment, so nothing was recorded.
`ERR_SHIFT_NOT_OPEN`	You tried to put a waiting payment into a shift that is not open.
`ERR_PAYMENT_NOT_NEEDS_REFUND`	You tried to refund a payment that is not flagged as a late payment needing a refund.

What to do

1. Fix the amount and try again: Take payment (see Take payment).
2. For a closed shift, open a new one: Open a shift (see Open a shift), then retry.
3. For payments that arrived with no shift open, or late ones, use Payments to resolve (see Payments to resolve (manager)).
4. If a customer was charged and nothing shows, do not charge again. See Getting help (see Getting help).

Who can fix it

Putting a waiting payment into a shift needs the shift-management permission; a refund needs a refund permission, usually a manager. See Payments overview (see Payments at a glance) and POS overview (see Point of Sale at a glance).

Troubleshoot - a discount or price is refused

Use this page when a discount, a changed price or a large refund is refused.

The message you see

```
You do not have permission to give a discount or change a price. Ask a manager, or
use Senior/PWD where it applies.
A discount of 15% needs a manager's approval.
A manually priced line needs a manager's approval.
This sale needs a manager's approval (...).
That person cannot approve ...
That approval is not valid for this refund. Ask the manager to approve again.
```

The percentage and reasons in the messages change with your sale.

Why it happens

Code	Why
`ERR_DISCOUNT_NOT_PERMITTED`	You typed a discount or price change and your role cannot do that. Nothing is spent or saved.
`ERR_APPROVAL_REQUIRED`	The discount, manual price, flagged sale or large refund is above what your role may do alone.
`ERR_APPROVER_NOT_ALLOWED`	The person who approved is not allowed to approve this kind of action.
`ERR_APPROVAL_INVALID`	The approval given does not match this refund.

What to do

1. Ask a manager to approve, or sign in as someone who can: Discounts and approvals (see Discounts and manager approvals).
2. Where Senior or PWD applies, use that instead of a typed discount.
3. Ask for a new approval when it is not valid; each approval works once, for one action.
4. For refunds see Refunds and returns (see Refunds and returns).
5. Still stuck: Getting help (see Getting help).

Who can fix it

A manager (or higher) approves. An owner or admin changes who may discount in roles. See Sales overview (see Sales at a glance), POS overview (see Point of Sale at a glance) and Settings overview (see Organization and Settings at a glance).

Troubleshoot - payment reference and payment type errors

These messages appear at the till when a payment is refused. When one appears, nothing is saved for that payment, and you can correct it and try again.

The message you see

A manual payment needs its reference

```
A manual payment needs its reference (approval code, e-wallet or bank reference number)
```

This reference was already recorded

```
This reference was already recorded on this order
```

This payment is not waiting for a shift any more

```
This payment is not waiting for a shift any more
```

A payment type cannot be taken yet

```
Card payments cannot be taken at the till yet. Record a card, e-wallet / QR or bank transfer paid outside EVOZO as a Manual Entry with its reference.
```

The first word is the payment type you chose. Two shorter versions also exist: "Payments of type 'X' cannot complete a till sale yet" and "Payments of type 'X' cannot be taken at the till yet".

Why it happens

A manual payment needs its reference

You entered a payment paid outside EVOZO (a card terminal, e-wallet or bank transfer) and left the reference empty.

This reference was already recorded

The same payment type and reference appear twice on one order. The comparison ignores upper and lower case.

This payment is not waiting for a shift any more

You tried to move a payment to a shift, but that payment is no longer in the "waiting for the next shift" state. Someone may have already handled it.

A payment type cannot be taken yet

The till does not take that payment type directly. A sale is never completed without the money being recorded.

What to do

A manual payment needs its reference

1. Read the approval code or reference number from the terminal slip or the customer's e-wallet or bank receipt.
2. Type it in the reference field. Example: a café customer pays by e-wallet, so enter the e-wallet reference number.
3. Take the payment again.

This reference was already recorded

1. Check the slip. Two separate payments have two different references.
2. If you typed the same one twice by mistake, remove the duplicate line.
3. If the customer really paid twice, enter the second payment's own reference.

This payment is not waiting for a shift any more

1. Open **Payments to resolve** and refresh the list. See payments-to-resolve (see Payments to resolve (manager)).
2. If the payment is gone from the list, it was already handled. Do nothing more.

A payment type cannot be taken yet

1. Take the payment on the card terminal, e-wallet or bank app.
2. Record it as a Manual Entry with its reference. Example: a hardware shop records a card payment with the terminal approval code.

Who can fix it

A manual payment needs its reference

You can, at the till.

This reference was already recorded

You can.

This payment is not waiting for a shift any more

A shift manager can confirm. If it still looks wrong, email support@evozo.ph.

A payment type cannot be taken yet

You can use the Manual Entry route. Only EVOZO can add direct support for the type. Email support@evozo.ph to ask.

Payments waiting for a shift

Understand and clear a gateway payment that was confirmed while no shift was open on the terminal.

Before you start

- The payment was a gateway payment (for example a QR payment). The customer paid after the last shift was closed, so the money is in no drawer yet.
- To see this page you need shift management or the gateway refund permission. To assign a payment you need shift management.

Steps

The easy way: open the next shift.

1. On the terminal, open a shift (see Open a shift (see Open a shift)). Waiting payments of that terminal move into the new shift by themselves.

Assign it by hand:

1. Open **Shifts**, then click **Payments to resolve (refunds and payments waiting for a shift)**.
2. Under **Waiting for a shift**, find the order. The row shows the order number, the payment mode and the amount.
3. Click **Assign to a shift**.
4. Under **Open shift (required)**, choose the shift, then click **Assign**.

Result

- The payment counts in that shift's figures and in its close-out.
- The row leaves the list. An empty list reads **Nothing is waiting.**

Tips

- Only shifts open on the payment's own terminal are offered. If none is open, the form says **No shift is open on this payment's terminal.** Open one first.
- A payment waiting for a shift is not counted in any drawer. Clear the list before you close the day's last shift.
- Example: a café customer pays by QR at 10:02 pm, two minutes after closing. The payment waits. The opening cashier at 6 am opens the shift and it is picked up.
- Refunds and cash returned are on Payments to resolve (manager) (see Payments to resolve (manager)).

Questions

Q: I do not see Assign to a shift.

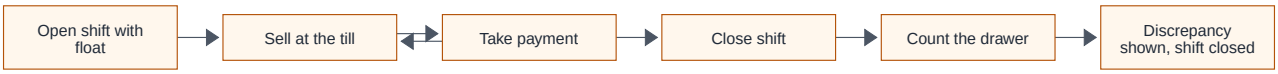
A: Your role does not include shift management. Ask a manager.

Q: The customer says they paid but nothing is listed.

A: Contact support@evozo.ph with the order number and time.

A till day from opening the shift to the cash count

Walk through one cashier's day: open the shift, ring up sales, take payment, then close the shift and count the drawer.



Who does what

Role	Does this	Needs
Cashier	Opens the shift, sells, takes payment, counts and closes	Open shifts, close shifts, create orders
Manager	Reviews the shift and can close a shift left open	Close shifts

Steps by stage

1. Open the shift

1. At the till, select **Open shift**. The window is titled **Open Till Shift**.

2. Type the **Opening Cash Float (PHP)**, the cash already in the drawer.
3. Select **Start Shift**. The cashier is taken from your signed-in session.

2. Sell and take payment

1. Build the sale on the till (see Sell at the till (see Sell at the till)). A café might ring up two coffees and a pastry; a hardware counter might sell a box of screws.
2. In **Complete Checkout**, check **Amount Due**. As you add payments, **Paid so far** and **Balance** update.
3. Choose **Cash**, a gateway button, or **Manual entry**. For cash, type **Cash handed over (PHP)** and select **Add cash payment**; **Change Due (cash)** shows what to give back.
4. For a payment taken on a separate card terminal or transfer, use **Manual entry** and type the reference. See Take payment (see Take payment).
5. A sale can be paid with more than one payment. Repeat until the balance is zero.

3. Close the shift

1. Select the close action to open **Close Till Shift**.
2. Read **Opening Float**, **Cash Sales**, **Card Sales**, **QR Sales**, **Bank Transfer Sales**, **Gateway Sales (QR Ph / link)** and **Cash Refunds**.
3. Read **Expected Closing Cash**, then count the drawer and type **Actual Cash Count (PHP)**.
4. **Discrepancy:** shows the difference. Add **Notes / Explanations** if it is not zero.
5. Select **End & Close Shift**.

Variations

- A manager can close a shift a cashier left open, from the shifts list (**Close shift** on the row). The list shows **Expected cash** and **Counted cash**.
- Gateway payments that arrive after the cashier moved on are handled in Payments to resolve (see Payments to resolve (manager)).
- Refunds taken during the shift are counted in **Cash Refunds**. See Refunds and returns (see Refunds and returns).

What happens behind the scenes

- Every sale and cash refund is tied to the shift open on that till, so the totals shown at closing are worked out from those records, not typed in.
- Expected cash comes from the float, cash sales and cash refunds. Card, QR, bank transfer and gateway sales are shown separately and are not part of the drawer count.
- The discrepancy is the counted cash compared with the expected cash.
- Closing needs the permission to close shifts; the **End & Close Shift** button is hidden without it.

Common problems

- **Start Shift** is missing: you cannot open shifts. Ask an owner or admin.
- The till asks you to open a shift before selling: no shift is open on this terminal.
- **Expected Closing Cash** shows a dash: the figures are still loading or could not be read. Close the window and try again.
- A cash refund is paid from the shift open at that time; if none is open, the refund cannot take cash from a drawer.

Kits and stock marks at the till

Read the stock marks in the product picker and understand how kits are limited by their parts.

Before you start

- A shift is open and you are on the till (see Sell at the till (see Sell at the till)).
- Stock is counted for the terminal's facility.

Steps

1. Open **All products** or **Favourites** and look for the **No stock** mark on a product, a variant, a pack or a quick-key tile. It means no way of selling that product is left.
2. Add a kit like any product. A kit is one item made of parts. Example: a "Tile repair kit" made of 1 trowel and 2 bags of grout.
3. In the cart, raise the quantity with **+**. When the line reaches what is left, **+** stops and the line says **Only N left**, or **No stock** if nothing is left.
4. If the cart shows **A line holds more than the stock left.**, reduce or remove the marked lines before you click **Pay**.

Result

- A kit can be sold only as many times as its scarcest part allows. 3 trowels and 10 bags of grout make 3 kits.
- Lines in the same cart share stock. A kit and a loose trowel in one cart both draw on the same trowels, and the limits add them up.

Tips

- The till refreshes the figures about every minute while the page is visible. It also refreshes when you come back to the page.
- If you see **Stock marks could not cover every item. The server still checks the stock when you pay.**, some kits could not be read. They are not locked, but the server may still refuse them at payment.
- A service or an unlisted item is never marked.
- If your organization allows selling without stock, the till shows no stock marks and locks nothing.
- A cut-to-size item counts its leftover cuttable length, not whole units. See Print cut slips (see Print cut slips for cut-to-size items).

Questions

Q: A product shows No stock but we have it on the shelf.

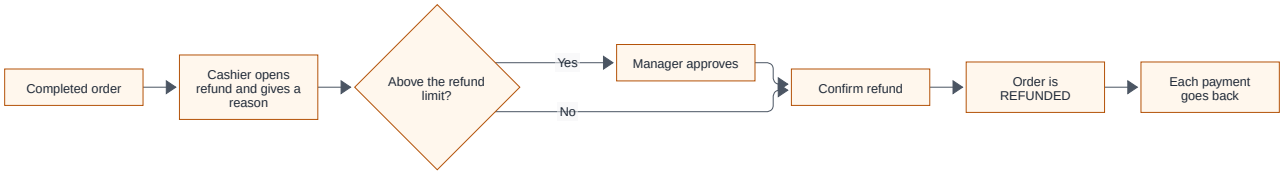
A: The system count is zero. Ask your inventory manager to correct the stock.

Q: Why did a kit stop at 3?

A: One of its parts has only enough for 3 kits.

A refund from request to money back

See how a refund on a finished till sale moves from the cashier's request, through any manager approval, to money going back to the customer.



Who does what

Role	Does this	Needs
Cashier	Opens the refund, types the reason and any refund reference, confirms	Create returns
Manager	Approves a refund above the limit, by PIN at the till or by remote approval	Authority to approve refunds
Customer	Receives the money in the way it was paid	Nothing in EVOZO

Steps by stage

1. Request

1. Open **Orders** and find the sale. Only an order with status COMPLETED can be refunded.
2. Open the refund. The window is titled **Refund order** with the order number, and shows **Order**, **Amount** and **Payment method**.
3. Type the **Reason for refund (required)**.

2. Check how the money goes back

1. Read **How the money goes back**. Each payment is listed with its amount and how it is returned.
2. For a payment taken outside EVOZO (a card terminal or a transfer), reverse it there first, then type the **Refund reference (required)**: the terminal reversal code or transfer reference.

3. Approval

1. The window checks whether the refund needs approval.
2. If it says **Above the refund limit: a manager must approve.**, a manager approves at the till or remotely. Once done it reads **A manager approved this refund.**

4. Refund

1. Select **Confirm refund**. If it fails and can be retried, the button reads **Try again**.
2. The order moves to REFUNDED and shows its refund details.

Variations

- Cash is paid back from the drawer of the shift open on that terminal, and the closing screen counts it under **Cash Refunds**. See A till day from opening the shift to the cash count (see A till day from opening the shift to the cash count).

- Payments made through a payment gateway are refunded through the gateway. If the gateway refuses, the order stays as it was.
- QR Ph payments that the gateway cannot refund are returned in cash.
- A hardware counter refunding a cut-to-size order: cut jobs not yet cut are cancelled and release what they held.
- Money that arrives late for an order is handled in Payments to resolve (see Payments to resolve (manager)).

What happens behind the scenes

- A till refund always covers the whole order, never part of it.
- The approval limit is a setting of the business. A refund at or below it needs no approval. Above it, a manager must approve, either by holding the authority themselves or through a one-time approval made for exactly that order and amount. A refusal never uses up the approval.
- The order status and each payment's refund details are saved before the gateway is called. If the gateway fails, everything is put back, so the order is not left half refunded.
- Two quick clicks cannot refund twice: the order is locked while the refund runs.
- The refund records for each payment how it was returned, the amount, the time and the reference you typed.

Common problems

- No refund action: the order is not COMPLETED, or you cannot create returns.
- **Enter the refund reference for each card, e-wallet or transfer payment.** A reference is missing.
- **A manager must approve this refund.** Get approval, then confirm again.
- **This order was already refunded or can no longer be refunded.** Check the order in **Orders**.

POS Terminal: frequently asked questions

POS questions and answers

Short answers to common POS questions.

Questions

Why can't I see QR Ph or Card / e-wallet link?

They show only when your business has connected a payment gateway and switched it on. Ask an administrator. Cash and **Manual entry** always show.

The screen says "Gateway payments could not be loaded."
Cash and Manual entry still work. Try again later.

Why can't I pay or add items?

You may have no open shift (click **Open shift**), or your shift is closing-up permission.

Why is Favourites empty?

Set up quick keys, or use the **All products** tab.

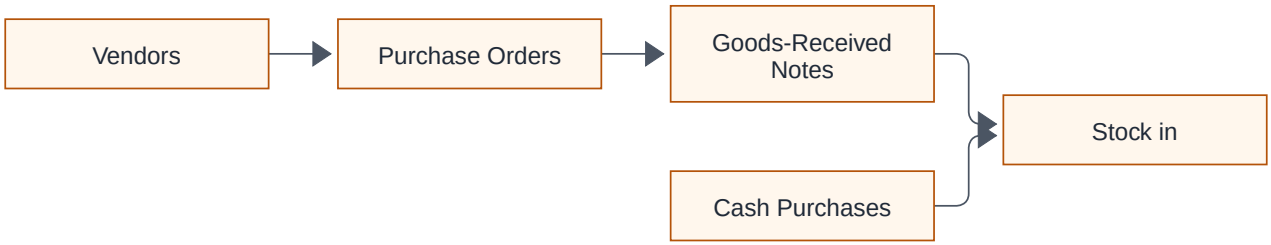
A customer paid by QR Ph but the sale shows waiting.
Click **Check now**. If it expired and they paid late, a manager resolves it under **Payments to resolve**.

Why is the Pay window locked to the balance?
A payment is already on the sale, so you must take the rest of the balance.

Procurement & Vendor Management

Procurement at a glance

Procurement (Procurement & Vendor Management in the menu) is where you buy what you need, for example sheet steel from a supplier, milk and cups for a café, or restocking a shop.



Availability

- Procurement is a separate module. If you cannot see Procurement & Vendor Management in the menu, your organization does not have it. See Find modules (see Find modules) or write to support@evozo.ph.
- **Cash Purchases** is the exception: basic cash purchases come with Sales.

Before you begin

- Your organization has the Procurement module (see Availability).
- Your role must allow the screen. The menu hides entries you cannot use.
- Vendors and the products you buy must exist before you order.

Key ideas

- A **vendor** is a supplier you buy from.
- A **purchase order** is your order to a vendor. See Purchase order statuses (see Purchase order statuses).
- A **goods-received note** records what actually arrived. See Goods-received note statuses (see Goods receipt statuses).
- A **cash purchase** is something paid for on the spot without a purchase order. See Stock in without a purchase order (see Bringing in stock without a purchase order).
- How records work (see How records work) explains drafts, statuses and why saved records are not freely edited.

What you can do here

The Procurement menu has these screens: **Dashboard**, **Vendors**, **Purchase Orders**, **RFQs**, **Goods-Received Notes** and **Cash Purchases**.

- Keep a list of **Vendors** and raise **Purchase Orders**.
- Ask vendors for prices in **RFQs**.
- Record what arrived in **Goods-Received Notes**. Putting the stock away is covered in Receive stock (see Receive stock).

- Record on-the-spot buying in **Cash Purchases**.

What this module does not do yet

- It does not show stock levels. Those are in Inventory.

Related

- Purchase order statuses (see Purchase order statuses)
- Goods-received note statuses (see Goods receipt statuses)
- Receive stock (see Receive stock)
- Stock in without a purchase order (see Bringing in stock without a purchase order)
- How records work (see How records work)
- Find modules (see Find modules)

Purchase order statuses

Every status a purchase order can have, what it means and who can move it.

Status	What it means	What can happen next	Who can move it
Draft	Being written.	Submit for approval, approve, or cancel.	`procurement.orders.create` (submit, cancel); `procurement.orders.approve` (approve)
Pending approval	Submitted and waiting for a decision.	Approve or cancel.	`procurement.orders.approve` (approve); `procurement.orders.create` (cancel)
Approved	Accepted. Goods can now be received against it.	Receive goods, or cancel.	`procurement.grns.execute` (receive); `procurement.orders.create` (cancel)
Partially received	Some of the goods have arrived.	Receive more, or cancel.	`procurement.grns.execute` (receive); `procurement.orders.create` (cancel)
Received	All goods have arrived.	Nothing. It cannot be cancelled.	None
Cancelled	Stopped.	Nothing. It cannot be cancelled again.	None

Rules

- Only a Draft order can be submitted for approval.
- Only a Draft or Pending approval order can be approved.
- Any order that is not Received or Cancelled can be cancelled.
- Goods can only be received against an Approved or Partially received order. Otherwise the system answers with a status conflict that names the current status.
- If two people change one order at the same time, the second change is refused with the status that now stands.
- Each status change is written to the audit log.

Add and manage vendors

Keep a list of the suppliers you buy from, such as a steel supplier for a fabrication shop or a coffee roaster for a café. You pick a vendor when you create a purchase order or a price request.

Before you start

- Vendors and purchase orders are part of the Procurement module. If your plan does not include it, the screen answers "This feature comes with the Procurement module." Contact support@evozo.ph to add it.
- You need permission to manage vendors to add one or to change its status.

Steps

1. Open **Procurement**, then **Vendors**.
2. Click **Add Vendor**.
3. Enter the **Vendor Code** and **Vendor Name** (both required).
4. Optionally fill in **Contact Email**, **Phone Number**, **Payment Terms**, **Tax ID / TIN** and **Physical Address / Depot**. When **Payment Terms** is empty the list shows NET30.
5. Click **Save Vendor**.

Stop buying from a vendor

In the vendor list, click **Deactivate** on the row. The status changes from Active to Inactive. Click **Activate** to turn it back on. Nothing is deleted.

Tips

- The **Supplier Directory** card on the Procurement dashboard shows how many vendors are registered and links here.
- Next step: create a purchase order (see Create, submit and approve a purchase order).

Goods receipt statuses

Every status of a receiving record (the inspection and put-away queue) and of its lines.

Status	What it means	What can happen next	Who can move it
Pending inspection	Goods are logged and nothing has been checked yet.	Inspection starts, which makes it In progress.	`inventory.receiving.execute`
In progress	Some lines are being inspected or put away.	Completed once every line is put away.	`inventory.receiving.execute`
Completed	All lines are put away.	Nothing. It can no longer be changed.	None
Cancelled	Stopped.	Nothing. It can no longer be changed.	None

Line statuses

Status	What it means	What can happen next	Who can move it
Pending	Not checked yet.	Inspected.	`inventory.receiving.execute`
Inspected	Checked.	Put away.	`inventory.receiving.execute`
Put away	Stored in its location.	Nothing.	None

Related permissions

Step	Permission
Receive goods against a purchase order	`procurement.grns.execute`
Enter or change the cost at receiving	`procurement.grns.cost`
Accept a cost that differs from the order	`procurement.grns.tolerance`

See Purchase order statuses (see Purchase order statuses). The order moves to Partially received or Received as goods arrive.

Create, submit and approve a purchase order

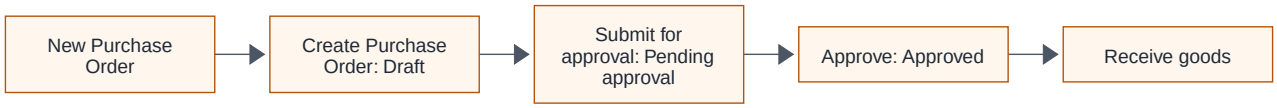
Order goods from a vendor, for example a pallet of steel bars for a fabrication shop, or milk and beans for a café. An order goes from Draft to Pending approval to Approved. See Purchase order statuses (see Purchase order statuses) for every status.

Before you start

- Purchase orders are part of the Procurement module (see Vendors (see Add and manage vendors)).
- Creating, submitting and cancelling need permission to create orders. Approving needs a separate permission to approve orders.
- Add the vendor (see Add and manage vendors) first.

Steps

1. Open **Procurement**, then **Purchase Orders**.
2. Click **New Purchase Order**.
3. Choose the **Vendor Partner** and the **Destination Warehouse**. Optionally set **Expected Delivery Date** and **PO Notes / Logistics Instructions**.
4. Under **Purchase Order Line Items**, click **+ Add Line Item**. Pick a product, enter the quantity and the cost per unit. If the product is sold in packs, a unit list appears so you can order by the pack.
5. Click **Create Purchase Order**. The order starts as Draft.
6. On the order row, click **Submit for approval**. The status becomes Pending approval.
7. A person with approval permission clicks **Approve**. The status becomes Approved and goods can be received.
8. To stop an order, click **Cancel**. It is disabled once the order is Received or Cancelled.



When the system refuses

If an order is no longer in a status it can move from (for example someone cancelled it while you had the page open), the screen shows a message naming the current status. The request returns a 409 conflict and nothing changes. Refresh the list and check the status.

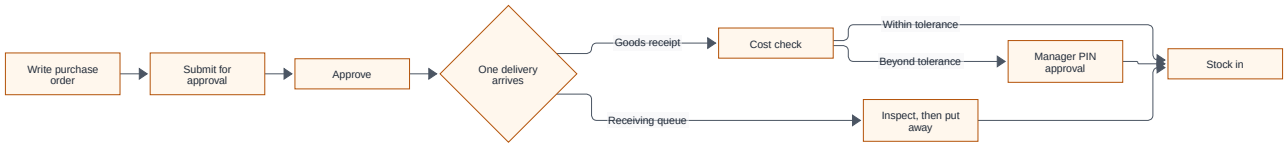
Receiving more than is still left on a line is also refused with a 409 message. This protects against counting one delivery twice. See Receive against a purchase order (see Receive against a purchase order).

Tips

- **Approve** is only enabled while the order is Pending approval, and **Submit for approval** shows only on Draft orders.
- Line costs you type here are the order price. Receiving at a different price is covered in Cost tolerance and PIN approval (see Cost tolerance and PIN approval).

From purchase order to stock on the shelf

Follow a purchase from the order you write, through the delivery you check in, to stock you can sell. Procurement is a separate module from Inventory and Manufacturing, so this page applies when Procurement is switched on for your business.



Who does what

Role	Does this	Needs
Buyer	Writes and submits the order	Create purchase orders
Approver	Approves the order	Approve purchase orders
Receiver	Records each delivery	Receive goods
Receiver with cost rights	Enters a cost that differs from the order	Set a receipt cost
Manager	Approves a cost beyond the allowed difference	Approve receipt costs, or their PIN

Steps by stage

1. Order

1. Select **New Purchase Order** and fill in the supplier and lines. A hardware shop might order a pallet of cement; a café a case of coffee beans.
2. Select **Submit for approval**. Only a draft can be submitted. See Purchase order statuses (see Purchase order statuses).
3. An approver selects **Approve**. The approver is whoever is signed in. Goods can now be received.

2. Receive each delivery

Receive every delivery once, when it arrives. Two ways exist:

- **Receive Goods (GRN)**: choose the order, enter the quantity on each line and select **Record goods receipt**. The stock goes in at that moment.
- **Receiving queue**: log the delivery, inspect each line, then put each line away. Stock goes in as each line is put away. See Goods receipt statuses (see Goods receipt statuses).

The order becomes Partially received or Received depending on what has arrived. You cannot receive more on a line than is still to come.

3. Check the cost

1. Leave the cost blank, or enter the order's price, and it is accepted as it is.
2. A different cost can be entered only by someone allowed to set a receipt cost.
3. A difference within your allowed percentage and amount per line is accepted and recorded.
4. A difference beyond that stops the receipt until a manager approves it with their PIN (**Authorize**), or approves it themselves with **Approve this cost** and a reason.

4. Stock in

1. Each received line becomes stock in the warehouse, with the supplier's batch number or one made for it, at the checked cost.
2. The cost is also kept as the product's latest purchase cost.

Variations

- A delivery can be received straight away with **Receive Goods (GRN)**, or logged and put away line by line in the receiving queue.
- A cost that differs beyond your allowed limits needs a manager's PIN or approval.

What happens behind the scenes

- Each received line becomes stock in the warehouse at the checked cost, with the supplier's batch number or one made for it.
- The cost is also kept as the product's latest purchase cost.
- The order becomes Partially received or Received depending on what has arrived. You cannot receive more on a line than is still to come.

Common problems

- **Receive Goods (GRN)** says the order cannot be received: it must be Approved or Partially received.
- A cost is refused: you need permission to set a receipt cost, or the difference needs a manager's approval.
- The approval dialog lists no one: an owner or admin must set an approval PIN first.
- Questions: support@evozo.ph.

Receive against a purchase order

There are two ways to bring an ordered delivery in. Use one of them for each delivery. Stock is counted once.

Way	Where	Use it when
Goods receipt (GRN)	**Procurement**, then **Goods Received (GRN)**	You want to record the delivery straight against the purchase order.
Receiving queue	**Receiving** in the Inventory menu (see Receive stock (see Receive stock))	You inspect and put away the goods in steps.

If a delivery is already counted by one way, the other refuses it with a 409 message. A queue created with a GRN ID only moves stock that the goods receipt already added.

Before you start

- The order must be Approved or Partially received. See Purchase order statuses (see Purchase order statuses).
- You need permission to receive goods. That does not let you change or see costs. Typing a different cost needs permission to set a receipt cost, and seeing costs across the app needs permission to read costs. Without cost permission the cost box is disabled and goods are received at the order price.

Steps

1. Open **Procurement**, then **Goods Received (GRN)**.
2. Click **Receive Goods (GRN)**.
3. Choose the **Purchase order**. The warehouse shows under **Receiving into**.
4. Optionally enter **Received by** and **Inspection notes**.
5. Under **Items on this order**, tick the lines that arrived. Each line shows what was ordered, received and left.
6. Enter the **Quantity received**. Add **Lot number** and **Expiry date** if the line asks for them.
7. If a cost differs from the order price, see Cost tolerance and PIN approval (see Cost tolerance and PIN approval).
8. Click **Record goods receipt**.

A receipt with an adjusted cost shows **Cost adjusted** beside its item count in the list.

Related

- Goods receipt statuses (see Goods receipt statuses)
- Stock in without a purchase order (see Bringing in stock without a purchase order)

Record and confirm a cash purchase

Use this when someone buys stock with cash and gets a receipt, for example a café buying milk from a grocery, with no purchase order. The purchase waits for a different person to confirm it. No stock is added until then.

The screen is **Cash Purchases** (reached from the Procurement dashboard banner, or the address `/procurement/cash-purchases`). For the receiving side, see Stock in without a purchase order (see Bringing in stock without a purchase order).

Before you start

- Recording needs permission to record cash purchases. Confirming or rejecting needs permission to confirm them. You see the screen if you have either.
- Staff without permission to set receipt costs are held to the per-purchase and daily limits set under Inventory settings, **Cash Purchases**. Both start at 0, so until the owner sets them only owners and admins can record.

Record

1. Open **Cash Purchases** and click **Record a cash purchase**.
2. Enter the **Receipt number** and **Date of purchase**. Optionally enter **Store name**.
3. Choose **Received into**.
4. Under **Items**, pick a product, then enter **Quantity** and **Cost per** unit. Click **Add another item** for more lines.
5. Attach **Photo of the receipt** (required when the organization turns that on). Optionally add a **Note**.
6. Click **Record purchase**. It shows as waiting.

Confirm or reject (a different person)

1. Open **Cash Purchases**. The **Waiting** filter shows what needs a decision. Each line is compared with the last purchase and flagged with "check this price" when it looks off.
2. Click **Confirm** to add the stock, or **Reject**.
3. Rejecting asks **Why is it being rejected?** and needs a reason, then click **Reject purchase**. Nothing was added, so nothing is undone.

The person who recorded it cannot confirm it while the setting **A different person must confirm each cash purchase (recommended)** is on. Turning it off lets a confirmer confirm their own, and the stock posts at once. Use that only in a one-person shop.

If a purchase stays in the posting state, click **Check this purchase**.

Other filters

Confirmed, **Rejected** and **All**. People without confirm permission see only the purchases they recorded.

The Cash Purchases screen comes with Sales. You do not need the Procurement module to record or review cash purchases.

Cost tolerance and PIN approval

When goods arrive at a price different from the purchase order, for example a hardware supplier raised the price of a box of screws, the receipt cost is checked against a tolerance.

How the rule works

- Leaving the cost blank, or entering the order price, uses the purchase order price. Anyone who may receive can do this.
- Entering a different cost needs permission to set a receipt cost. A manager's approval does not replace it.
- Any difference is recorded. Within the allowed difference you can add an optional reason.
- Beyond it, a manager must approve, and a reason is required.

The allowed difference is a percentage plus an optional peso cap for the line. Whichever is exceeded first needs approval. With no setting the percentage is 5.

Set the tolerance

1. Open Inventory **Settings** and the **Receipt Tolerance** tab.
2. Enter **Maximum variance percentage (%)** and **Maximum variance amount (PHP)**.
3. Click the save button. Only the owner or a procurement controller can change these.

Approve a cost on a receipt

When a line is beyond the tolerance, the receiving form shows "Beyond the allowed difference: a manager must approve it." and the **This cost needs approval** window opens.

1. Enter **Why is the cost different?**
2. If you may approve yourself, click **Approve this cost**. Your name and the reason are recorded.
3. Otherwise choose the person under **Who is approving?**, have them enter their PIN on the number pad, and click **Authorize**.
4. The line then shows "Approved by" the approver's name.

People with "no PIN set" cannot be chosen. If nobody has a PIN, an owner or admin sets one under Identity & Access, Account. Approved costs show **Cost adjusted** on the receipt list.

See Receive against a purchase order (see Receive against a purchase order).

Price requests (RFQs) and vendor items

PARTIALLY AVAILABLE
Preview. You can record price requests and mark them Accepted or Cancelled. Accepting one does not create a purchase order for you. Vendor items have no screen yet.

Ask a vendor for a price before you order, for example a quote for cut-to-length steel or a bulk case of cups.

What it does today

You can	It affects
Record a request with a vendor and items	A list of requests with a status.

You can	It affects
Mark a request Accepted or Cancelled	The status only. No order is created.
Vendor items	Not available on screen.

Steps

1. Open **Procurement**, then **RFQs**.
2. Click **New RFQ**.
3. Choose the **Target Vendor Partner**. Optionally enter **RFQ Scope Notes / Specifications**.
4. Click **+ Add Requested Item**. Pick the item, set the quantity and the unit of measure.
5. Click **Create RFQ**.
6. On the row, click **Accept** (enabled while Sent or Quoted) or **Cancel** (disabled once Accepted or Cancelled). A finished request cannot be changed.

After accepting, create the order yourself under Purchase orders (see Create, submit and approve a purchase order).

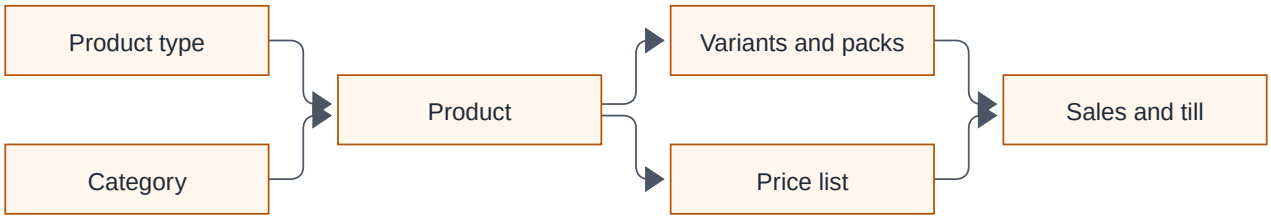
You need permission to manage RFQs, and the Procurement module (see Vendors (see Add and manage vendors)).

Not available yet: a button that sets a request to Sent or Quoted, and a vendor-items screen. Accept works only on a request that already has the status Sent or Quoted.

Product Management

Products and the catalog at a glance

The catalog is the list of everything you sell or use, such as a steel bracket in several sizes, a flat white, or a retail item, with its category and price.



Before you begin

- Your organization uses the Product Management module.
- Your role must allow it. Catalog Staff, Catalog Manager, an Administrator or the Owner can work in the catalog. Costs are shown only to roles that may see them.
- Other modules read the catalog, so set it up before you sell. See First day setup (see First-day setup checklist).

Key ideas

- A **product** is one thing you sell or use. A **variant** is a version of it, such as a size or colour, and a pack unit is a way of selling it, such as a box of 12.
- **Categories** group products. **Product Types** set what kind of thing a product is.
- A **price list** holds selling prices.
- **Bills of Materials** list the parts a made product needs.
- Sales, the till, stock and purchasing all use the same products.

What you can do here

The menu has these screens: **Dashboard**, **Products & Variants**, **Categories**, **Bills of Materials**, **Price Lists**, **Product Types** and **Upload Product Data**.

- Add and edit products, and set up variants and pack units.
- Load many products at once with **Upload Product Data**.
- Keep categories and price lists tidy.

What this module does not do yet

- The menu has no screens for stock levels or purchasing. Those are in other modules.

Related

- Add a product (see Add a product)
- Edit a product (see Edit a product)

- Variants and pack units (see Variants and pack units)
- Upload products (see Upload products)
- Products FAQ (see Products FAQ)
- First day setup (see First-day setup checklist)
- How EVOZO is organised (see How EVOZO is organised)

Add a product

Create a single product in Product Management.

Before you start

- You need the permission catalog.products.create.

Steps

1. Open **Product Management**.
2. Select **Add Product**. The **New Product** form opens.
3. Fill in the product details.
4. Choose **Base Unit of Measure ***. It is required.
5. Select **Save Product**.

Tips

- To add many products at once, use **Upload and check** instead. See the upload-products guide.

Edit a product

Change the details of an existing product.

Before you start

- You need the permission catalog.products.update.

Steps

1. Open **Product Management**.
2. Find the product and select **Edit**. The **Edit Product** form opens.
3. Change the fields you need.
4. Select **Update Product**.

Tips

- Use **Manage Categories** on the list page to maintain categories.

Variants and pack units

Add pack units to a product (such as a box of 12 bolts or a case of 24 cups) and generate its variants (such as size and colour).

Steps

Add a pack unit

1. Open the product form with **Add Product** or by editing a product.
2. Find the **Pack units** section.
3. In the unit list (**Unit…**), choose the pack's unit.
4. Enter **Qty in base**, the number of base units in one pack. For example, 12 for a box of 12.
5. Optionally enter a **Barcode (optional)**, and tick **Sellable** and **Purchasable** as needed.
6. Select **Add pack unit**.
7. Select **Save Product** (or **Update Product** when editing).

A pack without a barcode shows **Generate**, which creates one. **Edit** and **Remove** change or delete a pack. With no packs, the product is sold and bought in its base unit only.

Generate variants

1. On the products list, find the product row. Select **Matrix** (shown as **+ Matrix** when the product has no variants yet; the **Variants** count opens the same window).
2. In the **Generate Variant Matrix** window, choose the values to combine.
3. Select **Generate variants**.

Tips

- The variant matrix is opened from the products list, not from inside the product form.
- Packs are used when selling (the unit list on a sales order line) and when entering opening stock (**Whole packs**).

Upload products

Add or update categories, products and pack units from a spreadsheet. The steps are Upload, Check, Review and Import.

Before you start

- You need the permission catalog.products.import.
- Codes identify records: a row whose code already exists updates that record, and a new code creates one. Blank cells never erase existing values.

Steps

1. Open the upload page (**Upload Product Data**).
2. Select **Download template** and fill in its tabs: Categories, Products and Pack Units. The Instructions tab explains every column.
3. Choose your file: the .xlsx file, or three CSV files named categories.csv, products.csv and pack_units.csv.

4. Select **Upload and check**.
5. Review the tabs **New**, **Changes**, **Unchanged**, **Warnings** and **Errors**. Each tab shows a count.
6. If there are errors, fix them in your file and upload it again. **Confirm import** stays unavailable while errors remain.
7. Select **Confirm import**.
8. When it finishes, select **Download results** to keep a record. To import another file, select **Upload another file**. To restart before importing, select **Start over**.

Tips

- Look at the **Errors** tab before confirming.
- If an import fails and can be retried, **Confirm again** appears next to **Start over**.
- If the page cannot confirm the status, select **Refresh status**.

Organise products into categories

Build the category tree your products are filed under, for example Drinks > Coffee, or Fasteners > Bolts.

Before you start

- Open **Categories** under Product Management. The same tree is also in Settings under Reference Data & Codes.
- Decide your top-level groups first. A category can sit under another category as deep as you need.

Steps

1. Open **Categories** and select **Add Category** to add a top-level group.
2. In the **Add Product Category** panel, optionally pick a **Parent Category**. Leave it on **None (Root Category)** for a top-level group.
3. Type the **Category Name**. A **Category Code** is suggested when you leave the name field; select **Generate Code** to create it again.
4. Select **Create Category**.
5. To add a sub-category, select **+ Child** on a row.
6. To rename, select **Rename**, change the name and select **Save**.
7. To move a category, use the up and down arrows to reorder it among its siblings, or pick another parent in the **Parent** list.
8. To set the features a new product starts with, select **Feature defaults**, choose the feature and a default value, then select **Save feature defaults**.

Result

Products can be filed under the category in the **Category** field of the product form. New products pick up the category's feature defaults as their starting feature settings.

Tips

- The code cannot be changed after you save it, so pick one you will keep.
- A category that a product uses can only be turned off with the **Active** switch. It shows a "referenced" tag and its **Delete** button is disabled.

- A category that still has children cannot be deleted. Move or remove the children first.
- Feature defaults apply only to products created afterwards. They do not change existing products.

Questions

Q: I cannot move a category under another one.

A: A category cannot move under itself or one of its own sub-categories. Pick a different parent.

Q: Where do I put a product into a category?

A: In the product form. See Add a product (see Add a product) or Edit a product (see Edit a product).

Q: Who can help if a button is missing?

A: Anyone signed in can see the categories, but adding, renaming, moving or deleting them is for an owner or admin. Ask one of them, or write to support@evozo.ph.

Product types and behaviour flags

Set up product types so new products start with the right behaviour, such as stocked, sellable or lot tracked.

Before you start

- Open **Product Types** under Product Management. You can view the list without special rights. Changing it needs the catalog types permission.
- A type is a starting point. Changing a type's defaults never changes products that already exist.

Steps

1. Open **Product Types**. Types are grouped by nature (for example goods and services). The nature is fixed once a type is saved.
2. Select **New type**, or the add button inside a group.
3. Choose the **Nature**, type a **Name**, and optionally a **Code** and a **Parent type**.
4. Under **Behaviour defaults**, tick what applies:
    - **Stocked**: keep on-hand quantities per warehouse. Services are never stocked.
    - **Tracking**: none, lot or serial. Only stocked goods can be tracked.
    - **Expiry required**: only with lot tracking.
    - **Bill of materials**: the product can be built from, or deducted by, components.
    - **Sellable**: can be sold in the till and on quotations.
    - **Purchasable**: can be bought on purchase orders.
    - **Internal use**: consumed inside the business or in production.
5. Select **Create type** (or **Save changes** when editing).
6. Use **Deactivate** to stop using a type, or **Delete** for a type you added that no product uses. Types marked **System** cannot be deleted.

Result

When you pick the type on a new product, these flags are filled in. You can still change them on the product itself, in its **Behaviour** section.

Tips

- A type that products already use cannot be deleted. Deactivate it instead.
- Some product fields (for example **Tracking** while stock exists) are locked. The product form shows a **Locked** note with the reason.
- Example: a café can have a "Drinks" type that is sellable but not stocked, and an "Ingredients" type that is stocked, lot tracked with expiry and not sellable. A hardware shop can have "Fasteners" (stocked, sellable, purchasable).
- To change flags on one product only, use Edit a product (see Edit a product).

Questions

Q: I changed a type but my product did not change.

A: That is by design. Type defaults only pre-fill new products.

Q: The Delete button is missing on a type.

A: System types cannot be deleted. Other types are removed only if no product uses them.

Price tiers and price components

Sell the same product at different prices to different kinds of customer, and set exact prices for a product, variant or pack.

Before you start

- Open **Price Lists** under Product Management. Changing prices needs the catalog pricing permission; without it the page is view only.
- Add the product first. A price component for a pack needs the pack unit to exist, and pack units appear only after the first save of the product. See Variants and pack units (see Variants and pack units).

Steps

Create a price tier

1. In **Configured Customer Price Tiers**, select **+ New Tier**.
2. Enter a **Code**, a **Name** and a **Markup %**.
3. Tick **Default tier** for the tier used when a customer has none assigned. It shows as **Storefront Default**.
4. Select **Create**.

Set a price for a product

1. In **Price Components**, select **+ New Component**.
2. Leave **Scope** as **Product / variant / feature / pack unit**.
3. Choose the product. Optionally narrow it with **Variant (optional)**, **Pack unit (optional)** or **Feature value (optional)**.
4. Pick the **Price tier**, enter the **Price (PHP)** and, if needed, a **Minimum qty**.
5. Select **Create**.

Add a price change for a feature

1. Select **+ New Component** and set **Scope** to **Global feature modifier (POS delta)**.
2. Choose a **Feature value (required)**, the **Price tier** and the **Price delta (PHP)**, then select **Create**.

Result

The table lists each component with its scope, tier, price and minimum quantity. Use **Edit** or **Delete** on a row. The page also has a price resolver sandbox that shows how a simulated cost turns into each tier's price.

Tips

- A tier is a markup on cost. A component is an exact price that you set for a scope.
- A **Minimum qty** above 1 makes the row a quantity break. See Quantity breaks (see Quantity breaks).
- Use **Filter by product** to see one product's rows.
- A tier that is in use can be edited with **Edit**. Check the effect with the sandbox before changing a default tier.

Questions

Q: Why is the New Tier button missing?

A: Your role does not include catalog pricing. Ask an owner or admin.

Q: Where is the product's own base price?

A: In the product form, under **Base Selling Price (PHP Retail)**. See Edit a product (see Edit a product).

Quantity breaks

Lower the unit price when a customer buys more, for example 1 to 9 at one price and 10 or more at a lower price.

Before you start

- A product sells at a pack price or at quantity breaks, not both. Pick one under **How packs are priced** in the product's **Pack units** section.
- Quantity breaks count in base units. A box of 100 gets the break set at 100.
- Open **Price Lists**. Changing prices needs the catalog pricing permission.

Steps

1. If the product has pack units, open the product in **Product Management**, find **How packs are priced** and choose **Quantity breaks**. The setting saves at once.
2. Open **Price Lists** and, under **Price Components**, select **+ New Component**.
3. Choose the product and the **Price tier**. Leave **Pack unit (optional)** empty.
4. Enter the **Price (PHP)** for one unit at that level and a **Minimum qty** above 1, for example 10.
5. Select **Create**. Repeat for each break (for example 10, 50, 100).

Result

A sale of at least the minimum quantity uses that row's price. A pack sells at the break that fits its total pieces. The pack has no price of its own.

Tips

- Example (retail): 1 to 5 bottles at 45, 6 or more at 40. Example (hardware): 1 to 99 screws at 2.00 each, 100 or more at 1.60 each.
- If you switch to **A price for each pack**, the product page warns that quantity breaks are set but not used. The reverse switch warns about leftover pack prices. Remove the unused rows in **Price Lists**.
- With **A price for each pack** and no pack price, a pack sells at pieces times the piece price, with no discount.

Questions

Q: Why is my break ignored?

A: The product may be on **A price for each pack**. Switch it to **Quantity breaks**.

Bills of materials and kits

Record what a product is made from, so a finished product or kit can be built from, or deducted by, its components.

Before you start

- Open **Bills of Materials** under Product Management. Viewing is open; changing a recipe needs the catalog recipes permission. Without it the page says you can view recipes but not change them.
- The finished product and each component must already exist. The finished product's **Bill of materials** flag (in its **Behaviour** section) should be on.
- Example: a latte uses milk and espresso beans; a window kit uses a frame, glass and a handle set; a gift bundle uses three retail items.

Steps

1. Open **Bills of Materials** and choose the finished product under **Product**.
2. Under **BOM Versions**, enter the **Yield qty** (how many finished units one run makes) and **Effective from**. Add **Instructions** if useful, then select **New version**.
3. Select **Edit lines** on the version row.
4. Under **Lines**, choose the **Component**, enter **Qty**, **UoM** and optionally **Scrap %**, **Instruction** and **Comment**.
5. To make a line apply only to some variants, set **Applies when feature...** and **equals value...**. Otherwise it always applies.
6. Tick **Allow substitute component** if another part may stand in.
7. Select **Add line**. Use **Remove** to delete a line.

Result

Work orders and till deductions use the version that is effective on that day. Older versions stay on record.

If a sale is dated before every version (for example a sale rung up offline on an OMS Till, or a back-dated sale), the sale uses the current version, the one the product page shows, and its components are deducted. The same applies to a date between two versions, when no version is in effect on that date. In both cases the sale's notes say "Recipe applied: current version (sale predates it)" with the version.

A version that is in effect on the sale date but has no lines is never replaced by the current one. For a kit that does not hold its own stock (a non-stocked kit) with no usable recipe, nothing can be deducted: the sale is kept, flagged "needs reconciliation", and its notes say "Kit has no current bill of materials: nothing was deducted, flagged for reconciliation". For an OMS Till sale it also appears under **Stock shortfall**. A stocked kit with an empty version deducts its own stock.

Tips

- Change a recipe by adding a new version with a new **Effective from** date rather than editing history.
- A product with no versions shows its lines as the "legacy, always effective" recipe.
- Use the base unit when entering **Qty**. See Units, packs and the base unit (see Units, packs and the base unit).

Questions

Q: A product does not appear as buildable.

A: Check that its type or its own **Bill of materials** flag is on. See Product types and behaviour flags (see Product types and behaviour flags).

Set a cutting policy for cut-to-size products

Sell stock by length (or by length and width) and keep track of the offcuts, such as pipe, glass sheets, cloth rolls or timber.

Before you start

- Open the product form with **Add Product** or by editing a product. See Add a product (see Add a product).
- Decide the length unit and the shortest piece you will sell.

Steps

1. In the product form find **Dimensional Cutting Policy**.
2. Tick **Cut-to-Size Stock**. The policy fields appear.
3. Choose the **Dimensional type**: 1-D (bars, rolls, pipes, cut by length) or 2-D (sheets, glass, cut by length and width).
4. Choose the **Unit (length)**.
5. Enter the **Minimum length**. For 2-D, also enter the **Minimum width**. Both must be greater than zero.
6. Enter **Blade / trim loss per cut** (zero or more), the material lost at each cut.
7. Optionally enter **Cut fee (display only)**.
8. Select **Save Product** (or **Update Product**).

Result

The policy is saved right after the product. Un-ticking **Cut-to-Size Stock** and saving removes the policy. The standard sizes you offer come from the product's pack units, listed under **Sizes come from Pack options**.

Tips

- Add pack units after the first save, in **Pack units**. They appear only once the product exists. See Variants and pack units (see Variants and pack units).
- The **Cut fee** is for display; it is not added to a sale on its own.
- Example: a 6 m pipe sold by the metre with a 0.5 m minimum, or a 2400 x 1200 board with minimum 300 x 300.

Questions

Q: The form shows red messages under the cutting fields.

A: A minimum is zero or empty, or the trim loss or cut fee is negative. Correct the value.

Q: I do not see this screen's follow-on pages (cut orders).

A: They need the warehouse licence and the cuts permission. Ask an owner or admin.

Units, packs and the base unit

Understand how EVOZO counts stock in one base unit, and how packs such as a box or a case relate to it.

Before you start

- You choose the unit on the product form, in **Base Unit of Measure ***. See Add a product (see Add a product).

Steps

1. Pick the base unit as the smallest unit you count or sell. A café sells cups, a hardware shop sells single screws or metres, a shop sells pieces.
2. Save the product. Pack units appear only after the first save.
3. Add each pack in **Pack units**: choose the unit under **Unit...** and enter **Qty in base**, the number of base units in one pack (12 for a box of 12). See Variants and pack units (see Variants and pack units) for the steps.
4. Choose how packs are priced under **How packs are priced**: **A price for each pack** or **Quantity breaks**. See Quantity breaks (see Quantity breaks).

Result

Stock is always counted in the base unit. A pack is just a multiple of it, so 3 cases of 24 is 72 in stock.

Tips

- Think of the base unit as the smallest thing you would ever hand over.
- A product sells at a pack price or at quantity breaks, not both.
- A pack with no price of its own sells at its quantity times the piece price.
- Each pack can have its own barcode, and be marked **Sellable** or **Purchasable**.
- The base unit can be locked once it is in use. The form shows a **Locked** note with the reason.

Questions

Q: I do not see Pack units on a new product.

A: Save the product first; the form says packs can be added after the product is saved.

Replacement-cost report

See what your sales would have earned if the stock had cost what your last purchase paid, so you know whether you can afford to restock.

Before you start

- You need permission to see costs (catalog.costs.read). The owner has it by default. The report is in the Sales menu as **Replacement-Cost Report**.
- The report looks at completed sales only.

Steps

1. Open **Replacement-Cost Report**.
2. Choose a period with **This month**, **Last month** or **Last 30 days**, or set **From** and **To**.
3. Select **Show report**.
4. Click a column heading (Product, Sold, Revenue, Margin in books, Margin at replacement, Gap) to sort.
5. Select **Download CSV** to save the table.

Result

Cards show **Revenue** (net of VAT), **Accounting profit**, **Profit at replacement cost** and **Gap**. Each product row shows **Cost in books**, **Cost to replace** (the last purchase cost per unit) and the **Gap**.

Tips

- A negative gap means restocking costs more than your books show, so the margin is thinner than it looks.
- Products with no purchase on record are left out of the replacement figures and counted in a note.
- A **No cost on sale** tag means the sale recorded no cost, so profit in the books is overstated.
- Days are counted in the organization's time zone, shown above the table.

Questions

Q: The menu entry is missing.

A: Your role does not include cost viewing. Ask an owner or admin.

Q: The period shows no sales.

A: Try a longer period.

Troubleshoot - a product change is refused

Use this page when saving a product is refused.

The message you see

```
Cannot change <fields>: <quantity> <unit> on hand, reserved or in transit.
Product '<id>' not found
```

`ERR_PRODUCT_INVALID` shows the specific reason in the message.

Why it happens

Code	Why
`ERR_PRODUCT_LOCKED`	The product has stock on hand, reserved or in transit, and you changed a field that is locked while stock exists. Nothing is saved.
`ERR_PRODUCT_INVALID`	A value on the product is not acceptable. Read the message.
`ERR_PRODUCT_NOT_FOUND`	The product no longer exists, or belongs to another organization.

What to do

1. For a locked field, leave it unchanged, or move or use up the stock first. See Edit a product (see Edit a product).
2. For an invalid value, correct the field named in the message.
3. For a missing product, search again and check your organization. To bring in many products see Upload products (see Upload products).
4. Still stuck: Getting help (see Getting help).

Who can fix it

Anyone who can edit products can fix a value. Locked fields need the stock cleared first. See Catalog overview (see Products and the catalog at a glance) and How records work (see How records work).

Troubleshoot - product price and price tier errors

Use this page when a product price or price tier is refused.

The message you see

This product already has a selling price

```
This product already has a selling price.
```

Price tier not found

```
Price tier 'TIER_ID' not found
```

`TIER_ID` is the tier identifier that was asked for.

Why it happens

This product already has a selling price

A price was being approved for a product that had none at the till. By the time it was saved, a price had been set (for example by a colleague, or in a product edit). Nothing was overwritten.

Price tier not found

A price tier (for example, a wholesale tier for a hardware supplier) was deleted or never existed, or an old page still points to it.

What to do

This product already has a selling price

1. Open the product and check the current selling price. See edit-a-product (see Edit a product).
2. If the price is right, carry on with the sale.
3. If it is wrong, change it in the product edit.

Price tier not found

1. Reload the page and pick the tier again from the list.
2. If the tier is missing from the list, it was removed. Choose another tier.

Who can fix it

This product already has a selling price

An owner or admin approves prices for unpriced products. Anyone who can edit products can change the price afterwards.

Price tier not found

An owner, an admin or a Catalog Manager (the `catalog.pricing.manage` permission) can re-create it. If it keeps happening, email support@evozo.ph with the tier name.

Product Management: frequently asked questions

Products FAQ

Common questions about Product Management.

Questions

Q: I cannot see **Add Product**.
A: You need the permission catalog.products.create. Ask an administrator.

Q: I cannot edit or delete a product.
A: Editing needs catalog.products.update and deleting needs catalog.products.delete.

Q: Why can I not open the upload page?
A: Importing needs catalog.products.import. The Catalog Manager role holds it; Catalog Staff does not.

Q: Which roles relate to products?
A: Catalog Staff (catalog_staff) adds and changes products. Catalog Manager (catalog_manager) also archives products, imports them, and manages recipes, product types and price lists. See the Roles chapter.

Q: I cannot see **Bills of Materials**.
A: This comes with the Warehouse or Manufacturing module. Add one of them to your plan to use it.

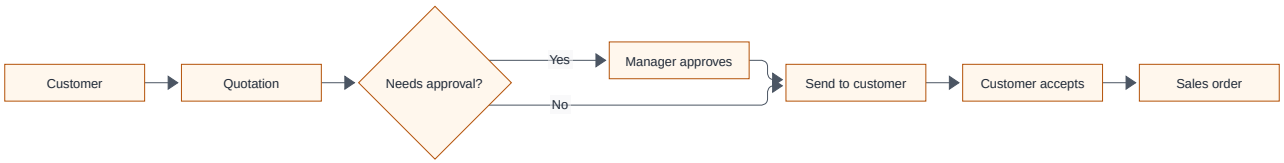
Q: What price does a product sell at if I have not set a tier price?
A: At its **Base Selling Price**, on the default price tier. If the product has no Base Selling Price either, it has no price and cannot be sold until one is set and approved.

Q: Why does the same product sell at a different price to some customers?
A: Their price tier has its own price or markup. A tier price that fits the quantity, pack and variant wins over the Base Selling Price.

Sales Management

Sales at a glance

Sales is where you offer a price to a customer and record what they order, for example a quote for cut and welded steel frames or a catering order for an office party.



Before you begin

- Your organization uses the Sales module. If you cannot see it, see Find modules (see Find modules).
- Your role must allow what you want to do. A quotation or order is created by a Sales Representative, a Sales Manager, an Administrator or the Owner.
- Products you sell come from the catalog. If you have none yet, start with First day setup (see First-day setup checklist).

Key ideas

- A **quotation** is a priced offer to a customer. It can need a manager's approval before it goes out.
- A **sales order** is what the customer has agreed to buy. An accepted quotation becomes one.
- The **Customer Directory** keeps the people and companies you sell to.
- Discounts above what a person may give need a manager. The **Approvals** screen is where those requests are handled.
- How records work (see How records work) explains drafts, statuses and why a saved record is not edited freely.

What you can do here

The Sales menu has these screens: **Dashboard**, **Sales Orders**, **Quotations**, **Customer Directory**, **Replacement-Cost Report** and **Approvals**.

- Build and send a quotation, and reuse a layout with templates.
- Turn an accepted quotation into a sales order, or create a sales order directly.
- Look up a customer in the **Customer Directory**.
- Managers: handle requests in **Approvals**.
- Roles that may see costs: open the **Replacement-Cost Report**. Only the Owner can give a person that access, through the Cost & Margin Viewer role.

What this module does not do yet

- The Sales menu has no screens for stock levels, purchasing or payments. Those are in other modules.

Related

- Create a quotation (see Create a quotation)
- Create a sales order (see Create a sales order)
- Turn an accepted quotation into a sales order (see Turn an accepted quotation into a sales order)
- Quotation templates (see Quotation templates)
- Sales quotations FAQ (see Sales quotations FAQ)
- Sales order questions (see Sales order questions)
- How records work (see How records work)
- What do you want to do? (see What do you want to do?)

Create a quotation

Build a priced quotation for a customer, get it approved if needed, and send or print it.

Before you start

- You need permission to create quotations.
- The customer must already exist. A quotation cannot be approved or sent without one.

Steps

1. Open **Quotations** in Sales and select **Add Quotation**. The page title reads **New quotation**.
2. Under **Details**, pick the **Customer *** and choose the **Facility ***. Optionally fill in **Attention**, **Project / site**, **Salesperson**, **Valid until** and **Price list**.
3. Under **Items**, search **Add a product** (by name or SKU). Use **Category** to narrow the list. If asked, choose a **Variant** or unit, then select **Add line**.
4. For non-catalogue work, use **Add service line**, **Add heading** or **Add text**.
5. On each line set **Qty**, **Price** and **Discount** (% or the peso amount). Use the up and down arrows or **Remove** to arrange lines. **Reset to list price** restores the catalogue price.
6. Under **Order discount and totals**, optionally choose a **Saved discount** or type an **Order discount** . Check **Subtotal**, **Total** and **VAT included**.
7. Under **Notes, terms and print options**, add **Notes** and **Terms and conditions**, and set a **Down payment** if needed.
8. Select **Save**. The preview on the right shows the printed sheet.
9. If a discount needs a manager, the page says so and offers **Get approval**. Otherwise, use the status bar that appears after saving: **Submit for approval**, **Approve**, then **Email to customer** or **Mark as sent**.
10. To hand over a copy yourself, use **Print** or **Save as PDF** at the top of the page.

Tips

- Until it is saved and approved, printed copies carry a DRAFT watermark.
- A line priced below its allowed minimum stays a draft until you raise it (**Set to lowest**) or a manager covers it.
- A product with no selling price asks for one (**This product has no selling price. Enter a price to continue.**). An owner or admin must approve it, by PIN or **Request approval**; the price is then saved on the product. Until then the quotation cannot be submitted or sent, and a sales order with that product cannot be confirmed.

- Sending or marking as sent freezes the prices. To change a sent quotation, use **Revise**.
- **History** shows revisions and every status change.
- Leaving with unsaved changes asks **Leave without saving?**

Create a sales order

Record a customer's order, from the warehouse that will supply it.

Before you start

- You need the permission to create sales orders. If **New Sales Order** is not on your screen, ask an owner or admin.
- Add the customer first if they are new: open **Customer Directory** and choose **Add Customer**. A customer is optional, so a walk-in order does not need one.

Steps

1. Open **Sales** from the module menu and go to the orders list (**Sales Orders**).
2. Choose **New Sales Order**. The **Quick Sales Order Entry** form opens.
3. Pick the **Destination Warehouse *** that will supply the order.
4. Pick the customer under **Customer (optional)**, or leave it empty.
5. Under **Order Line Items**, choose **+ Add Line Item**. In **Select Product / SKU** pick the product. If the product has variants, choose one from the variant list that appears. If it is sold in packs, choose the unit.
6. Set the quantity. The price per unit is filled in from the catalogue.
7. Optionally add a discount under **Discounts**: use a preset button or type a percentage in **Typed discount (%)**.
8. Choose **Confirm Sales Order**.

How the price is chosen

- If the product has a price for the customer's price tier that fits the quantity, pack and variant, that price is used.
- If it does not, a product sells at its **Base Selling Price** on the default tier. For example, a café sells a loaf at the Base Selling Price entered on the product until a tier price is added.
- On a tier that is not the default, a product with a known cost is priced from that cost plus the tier's markup.
- If a product has no tier price and no Base Selling Price, it has no price. The line is not sold at a guessed price: it must be priced and approved first.
- Only people allowed to give discretionary discounts can type a price or a discount. For everyone else the price box is locked.

Tips

- If a line is at or below cost, the form says a manager must approve the order. Choose **Get approval** and follow the dialog.
- A low-margin line shows a "Low margin" warning but does not block the order.
- Use **Cancel** to close the form without saving.

Quotation statuses

Every status a quotation can show, what it means, and who can move it on.

Status on screen	What it means	What can happen next	Who can move it
Draft	Being written. Lines and header can be edited.	Submit for approval, approve, or revise	`sales.quotations.create` to submit; `sales.quotations.approve` to approve
Pending approval	Waiting for a manager. Locked: it cannot be edited.	Approve, or return to Draft	`sales.quotations.approve`
Approved	A manager agreed. Can still be edited, which sends it back to Draft (or to Pending approval if the change needs approval).	Mark as sent, accept, reopen to Draft, revise	`sales.quotations.create` (approval only to decide)
Sent	Handed to the customer. Prices are frozen.	Accept, reject, expire, revise	`sales.quotations.create`
Accepted	The customer agreed. The sales order is made from it automatically, in the same step.	Converted (automatic)	`sales.quotations.create` to accept
Converted	A sales order has been created from the quotation. End state.	None	n/a
Rejected	The customer said no.	Revise (a new revision)	`sales.quotations.create`
Expired	The valid-until date passed while Sent.	Revise	`sales.quotations.create`
Superseded	A newer revision replaced it. End state.	None	n/a

When the customer accepts online

When the customer accepts on the customer link page, the sales order is created automatically. Nobody has to convert the quotation. The quotation moves from Sent to Accepted to Converted in one step, and the customer link page then shows it as accepted. The same happens when staff record an acceptance.

Who can move it

Step	Permission
Create, edit, submit, mark as sent, accept, reject, revise	`sales.quotations.create`
Approve, return	`sales.quotations.approve`

By default the creating role is owner, admin or sales representative, and the approving role is owner, admin or sales manager.

Approving a Draft directly

A person who holds the approve permission can approve a Draft in one step, without submitting it first. If that person prepared the quotation, the approval is recorded as a self-approval. Pricing checks, such as a price below cost, can still require a different approver.

See also Sales order statuses (see Sales order statuses).

Quotation templates

Save a repeatable set of lines and terms as a template, then start new quotations from it.

Steps

1. Open **Quotations**, select the **Templates** tab, then **Create Quotation Template**.
2. Under **Details**, enter a **Name ***. Optionally set **Valid for (days)**, **Price list**, **Who can use it** (**Everyone**, **Only these roles**, **Only me**) and a **Description**.
3. Under **Items**, add products, service lines, headings or text, as in a quotation. For each line you can set **Default qty**, **Options (name: value; ...)** and **Ask for the size when used**.
4. Optionally set a **Default discount**, **Notes**, **Terms and conditions** and **Down payment**.
5. Select **Save**.
6. To use it, open the template and select **Use template** (save first if you have unsaved changes).
7. In the dialog that opens, titled with the template's name, choose the **Facility *** if asked, pick a **Customer** (or leave **No customer yet**), set **Valid until (optional)**, enter any requested sizes or prices, and select **Make quotation**.
8. The new draft opens in the quotation workspace.

Tips

- A template keeps no prices. A new quotation is made at today's catalogue prices; lines with no catalogue price ask for one.
- **Duplicate** copies a template. **Archive** hides it; **Restore** brings it back. Archived templates cannot be used.
- **Use template** is also available from the template list.

Sales order statuses

Every status a sales order can show, what it means, and who can move it on.

Status on screen	What it means	What can happen next	Who can move it
DRAFT	The order is saved but not confirmed.	Reserve stock (this confirms it), or cancel	`sales.orders.update` to reserve; `sales.orders.cancel` to cancel
CONFIRMED	The order is confirmed (also how an order made from an accepted quotation starts).	Reserve stock, fulfil, or cancel	`sales.orders.update`; `sales.orders.cancel`

Status on screen	What it means	What can happen next	Who can move it
RESERVED	Stock is set aside for every line.	Fulfil, or cancel (reservations are released)	`sales.orders.update`; `sales.orders.cancel`
PARTIALLY_FULFILLED	Some of the goods have gone out; the rest are still owed.	Fulfil the remainder, or cancel	`sales.orders.update`; `sales.orders.cancel`
FULFILLED	All goods delivered. End state.	None. It cannot be cancelled.	n/a
CANCELLED	The order was cancelled and reservations released. End state.	None	n/a

The order list shows these words exactly as written above.

Payment status (a separate field)

Payment status	Meaning
UNPAID	Nothing paid yet.
PARTIALLY_PAID	Part of the total is paid.
PAID	Fully paid.

Things that stop a move

- Cancel is refused while the order holds a customer deposit.
- Reserving or confirming is refused if a product on the order has no selling price (orders made from a quotation are not re-checked).

Who can move it

Step	Permission
Make an order	`sales.orders.create`
Reserve, fulfil, change	`sales.orders.update`
Cancel	`sales.orders.cancel`
Record a customer deposit	`sales.deposits.record`

See also Quotation statuses (see Quotation statuses).

Turn an accepted quotation into a sales order

Record the customer's acceptance; the sales order is created at the same moment.

Before you start

The quotation must be sent (or approved, if you handed it over in person). See create-a-quotation (see Create a quotation).

Steps

1. Open the quotation from **Quotations**.
2. Select **Mark accepted**.
3. In **Mark as accepted**, optionally attach the **Signed Conforme (optional, PDF or photo)** and add a **Note (optional)**.
4. Select **Confirm**. This creates the sales order and freezes the prices.
5. The status bar now says **Sales order created.** Select **Open sales orders** to see it.
6. The system then tries to reserve stock for the order. If it cannot reserve everything, the quotation and the order show **Stock could not be fully reserved.** with each short line: the **Product**, how many were **Ordered**, how many are **Reserved** and how many are **Short**. The order stays CONFIRMED, not RESERVED. Once stock arrives, select **Reserve** on the sales order.
7. If the quotation has a down payment, a **Deposit** section appears. Use **Record a deposit** to enter the money received; an Acknowledgement Receipt is made (not an Official Receipt).

Tips

- Accepting does not always reserve stock. Reserving is attempted after the order is made and never undoes the acceptance.
- If the customer says no, use **Mark rejected** and give a **Reason ***. You can still **Revise** it afterwards.
- An expired quotation cannot be accepted. Revise it and accept the new revision.

Questions

Is there a separate convert step?
Not normally. Accepting creates exactly one sales order. Only older quotations accepted before this change may still show as ACCEPTED, and the system converts them to an order.

Approvals inbox

Decide the discount requests sent from the till and the quotations that are waiting for sign-off.

Before you start

- You need at least one of: Approve a manager discount (`sales.discounts.manager`), Approve an executive discount (`sales.discounts.executive`) or the quotation approval permission (`sales.quotations.approve`). Without one, the page does not open.
- To approve a discount request you enter your own approval PIN. Ask an owner or admin if you have not set one up.

Steps

1. Open **Sales** and go to the **Approvals** page. The count beside the title shows how many items are open.

2. Use the filter buttons to narrow the list: **All**, **Discount requests** or **Quotations**.
3. For a quotation card, select **Review**. The quotation opens so you can check it. The card shows the total, **Valid until**, when it was submitted and the reasons it needed approval.
4. For a discount request card, check who asked, the percentage (or the refund amount), the **Terminal** , **Amount**, **Items** and **Time left**.
5. Select **Approve**. Enter your approval PIN under **Your approval PIN**, add a **Reason (optional)** and select **Approve** again.
6. To refuse, select **Deny**, type the **Reason for denying (required)** and select **Deny** again.

Result

The request leaves the list and the cashier at the till sees the decision. A quotation you approved can move on to the customer (Create a quotation (see Create a quotation)).

Tips

- Each card shows a **Manager** or **Executive** tag. Manager requests (up to the manager limit, or a hand-typed price) need `sales.discounts.manager`. Requests above that limit need `sales.discounts.executive`.
- Discount requests expire. When **Time left** reaches zero the card shows **Expired** and **Approve** and **Deny** are switched off. Ask the cashier to send a new request.
- A card marked **Custom price** means the cashier typed a price instead of choosing a discount.
- Examples: a café cashier asks for 15% off a catering order; a hardware counter asks for a custom price on a cut-to-length order. Both land here.
- Limits and presets that decide what needs approval are in Quotation and discount settings (see Quotation and discount settings).

Questions

Q: Why is there no Approvals page for me?

A: Your role holds none of the three permissions above. Ask an owner or admin.

Q: The list is empty.

A: The page says **Nothing is waiting for your approval.** Nothing is open for your permissions right now.

Q: Who can help?

A: Write to support@evozo.ph.

Quotation and discount settings

Set when a quotation needs approval, how big a discount each level may give, and which saved discount types cashiers can pick.

Before you start

- You need the permission `tenant.settings.manage`.
- On the quotation card, only an owner or admin can change the settings. Anyone else sees **Only an owner or admin can change these settings.**
- Only the organization owner can change the discount limits, **Margin Warning (%)**, **Refund Approval Amount**, the cash in/out and cash drop approval amounts and the price rounding step. Others can see them but not edit them.

Steps

1. Open **Organization & Settings** and go to the **Sales & POS Operational Policies** page.
2. Under **Quotations**, choose when a quotation needs approval before it is sent or accepted: **Always (every quotation is approved first)**, **Only when a rule is hit** or **Never**.
3. If you chose **Only when a rule is hit**, set a **Total above (PHP)** amount and tick either or both: **The customer buys on credit terms**, **A discount goes beyond the preparer's own limit**.
4. Set **Default deposit** to **Off (none)**, **Percent of the total (%)** or **Fixed amount (PHP)**, and enter the value. Tick **Start production only after the down payment** if work should wait for it.
5. Select **Save quotation settings**.
6. Under **Storefront Operational & Discount Thresholds**, move **Cashier Discretionary Discount Limit** and **Manager Approval Limit** (0 to 50%). Set **Margin Warning (%)**, **Refund Approval Amount (PHP)** and **Default Quotation Validity (Days)** (1 to 365).
7. Select **Save Settings**.
8. For saved discount types, open **Reference Data & Codes**, then **Discount Types**. Select **Add Discount Type**, fill in **Discount Label**, **Discount Code**, **Calculation Mode** (fixed amount or percentage) and an optional **Maximum Value Cap**. Tick **Mandate manager PIN authorization before applying** or **Require written cashier justification / reason notes** if needed, then select **Create Discount Type**.

Result

- A discount up to the cashier limit needs no approval. Above it, a manager must approve. Above the manager limit, the request goes to an executive level approver (Approvals inbox (see Approvals inbox)).
- A price at or below cost always needs a manager's approval. A price above cost but under cost plus the **Margin Warning (%)** only shows an amber warning and never blocks the sale.
- A line with no catalogue price to compare against (a custom price) always needs a manager's approval.

Tips

- Example: a café sets the cashier limit at 5% and the manager limit at 15%. A 10% staff discount needs a manager. A 20% one goes to the executive level.
- Example: a hardware shop sets **Margin Warning (%)** to 10. Selling a 100-peso cost item at 105 pesos shows the warning. Selling at 100 or less needs a manager.
- Discount type codes cannot change after saving. A type already used on a sale can only be deactivated, not deleted.
- Each approver sets their own 6-digit approval PIN under Identity & Access, Account. There is no shared PIN.
- The refund limit works the same way: a refund above **Refund Approval Amount (PHP)** needs a manager.
- **Cash in/out approval amount (PHP)** (default PHP 1,000) sits next to it. Cash put into an OMS Till drawer, or an expense taken out of it, above this amount needs a manager. See Approvals on the OMS Till (see Approvals on the OMS Till).
- **Cash drop approval amount (PHP)** (default PHP 10,000) is separate: cash drops (drawer cash moved to the safe) have their own limit and do not count toward the expense total. Both are counted per till per business day, across every shift of the till that day, so opening another shift or closing and reopening does not reset them.

- **Round the price after a per-item discount to the nearest PHP** is off at 0.00. Set it to 0.50, for example, and a PHP 99 item with 15% off (PHP 84.15) is charged PHP 84.00. This applies to a per-item discount, in percent or in pesos, at the till, on quotations and on sales orders. A quotation already sent keeps the price it was sent with; the rounding applies to lines you price or edit after the setting is on. Only that item's price is rounded. The order total, VAT and the Senior / PWD discount stay exact, and an item with no discount is never rounded.

Questions

Q: Why can I not move the sliders?

A: Only the organization owner can change the limits.

Q: Where do I handle waiting requests?

A: In the Approvals inbox (see Approvals inbox).

Q: Anything else?

A: Write to support@evozo.ph.

Customers and price tiers

Register customers, set the price tier each one buys at, and switch an account on or off.

Before you start

- To add or edit a customer you need `sales.customers.manage`.
- To assign or change a price tier you also need `sales.customers.tier_manage` (**Change a customer's price tier**). Without it the tier field is locked and reads: Only a manager (price tier permission) can assign or change a customer's price tier.
- Tier names come from your price list setup. A new customer starts on the default tier, **Standard Retail** (code `RETAIL`).

Steps

1. Open **Sales** and select the **Customers** tab. Select **Add Customer**.
2. In **Register Customer**, enter the the company or customer name (required). Optionally add **Contact Person**, **Phone Number**, **Tax ID (TIN)** and **Email**.
3. Choose **Payment Terms**: **Cash On Delivery (COD)**, **Net 15 Days** or **Net 30 Days**.
4. Pick the **Assigned Price Tier** (if you hold the tier permission).
5. Select **Register Customer**.
6. To change an account later, open the customer, edit the fields and select **Save Changes**.
7. To stop using an account, open it and select **Deactivate**, then confirm. Select **Reactivate** to bring it back.

Result

The customer is available on quotations and sales orders. Prices for that customer come from their price tier, so a contractor can see contractor prices while a walk-in buyer pays retail.

Tips

- Examples: a hardware shop gives a regular fabricator a contractor tier; a café gives a catering client a wholesale tier; a retail shop leaves walk-ins on retail.

- An inactive customer shows an **Inactive** badge.
- Tier changes are audited.
- Discount limits are separate from tiers: see Quotation and discount settings (see Quotation and discount settings).

Questions

Q: The tier field is greyed out.

A: You lack the tier permission. Ask an owner or admin.

Q: I do not see Add Customer.

A: Your role lacks `sales.customers.manage`. Write to support@evozo.ph if you think that is wrong.

POS or Ordering System mode

Choose whether your organization sells at a till with receipts (POS) or takes orders and prints a plain order slip (Ordering System).

Before you start

- You need the permission `tenant.settings.manage`.
- The default is POS. If the setting is missing or unreadable, the app uses POS.
- The change takes effect the next time the app loads. Ask staff to reload.

Steps

1. Open **Organization & Settings** and go to the **Sales & POS Operational Policies** page.
2. Find the **Sales mode** card.
3. Choose **POS (point of sale, receipt)** or **Ordering System (OMS Terminal, plain order slip)**.
4. Select **Save sales mode**. **Sales mode saved.** confirms it.

Result

	POS	Ordering System
Terminal title	EVOZO POS	EVOZO OMS
Print preview	**Receipt Preview**, **Print Thermal Receipt**	**Order Slip Preview**, **Print Order Slip**
Slip content	Receipt with tax breakdown	Plain order slip: no VAT breakdown, no official-receipt wording

Guides marked for the Ordering System show only when this mode is on.

Tips

- Example: a café counter that hands out receipts stays on POS. A fabrication shop that takes orders and bills later by invoice suits the Ordering System.
- The till menu entry reads "OMS Till" in Ordering System mode.
- Only these two modes exist.

Questions

Q: The mode did not change on my device.

A: Reload the app. The mode is read once when the app loads.

Q: Who can help?

A: Write to support@evozo.ph.

Troubleshoot - a quotation cannot be saved, edited or sent

Use this page when a quotation will not save, edit or send.

The message you see

Choose a customer first

```
Choose a customer before this quotation is {doing}.
```

`{doing}` is the action, such as sent.

A line has no price

```
Line 2 has no price-list price. Enter a unit price.
```

The line number varies.

Price is below the allowed minimum

```
Price is below the allowed minimum — raise it or ask a manager
```

The quotation is read-only or locked

```
A quotation in {status} is read-only. Revise it to change it.
```

```
This quotation is waiting for approval and is locked. Ask the approver to return it to draft, then edit it.
```

```
A quotation in {status} cannot be edited. Revise it to change its lines.
```

The quotation changed while you were editing

```
The quotation changed while you were editing it. Reload it and try again.
```

Why it happens

- Choose a customer first: a quotation cannot leave without a customer.
- A line has no price: the product has no price-list price for this customer, so none could be filled in. Example: a fabrication job line with no listed rate.
- Price is below the allowed minimum: a line is priced under its cost floor. Drafts save freely, but a quotation cannot go out like this.
- Read-only or locked: only draft and approved quotations can be edited. Sent and later ones are frozen.
- Changed while you were editing: someone else saved first.

What to do

- Choose a customer first: pick a customer, then repeat the action.
- A line has no price: type a unit price on that line. See create-a-quotation (see Create a quotation).
- Price is below the allowed minimum: raise the price, or ask a manager to cover it with a reason.

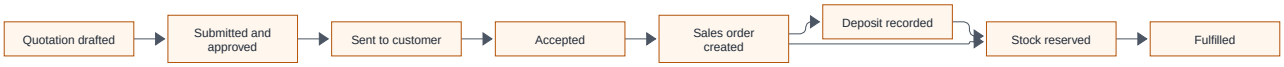
- Read-only or locked: revise the quotation, or ask the approver to return it to draft. See quotation-to-sales-order (see Turn an accepted quotation into a sales order).
- Changed while you were editing: reload the quotation and redo your change.

Who can fix it

- Choose a customer first: you can.
- A line has no price: you can, or ask whoever maintains prices.
- Price is below the allowed minimum: a manager can cover it.
- Read-only or locked: the approver for a quotation waiting for approval; you for a revision.
- Changed while you were editing: you can. If it repeats, email support@evozo.ph.

From quotation to cash and delivery

Follow one customer job from the first quotation, through the sales order and any deposit, to the day the goods leave stock.



Who does what

Role	Does this	Needs
Salesperson	Drafts the quotation, submits it, sends it, records the customer's acceptance	Create quotations
Approver	Approves the quotation, or returns it with comments	Approve quotations
Customer	Accepts or turns the quotation down	Nothing in EVOZO
Order desk or counter	Records a deposit, reserves stock, fulfils the order	Update sales orders

Steps by stage

1. Quote

1. Draft the quotation (see Create a quotation (see Create a quotation)). A hardware shop might quote cut glass and fittings; a café might quote a catering order.
2. Select **Submit for approval**. The quotation is locked until an approver approves it or returns it.
3. The approver selects **Approve**, or **Return with comments**.
4. Select **Email to customer**, or **Mark as sent** if you handed it over yourself.

2. Accept and create the order

1. When the customer agrees, select **Mark accepted** and fill in **Mark as accepted**.
2. The page now says **Sales order created.** Select **Open sales orders** to see it.
3. If the customer says no, select **Mark rejected**. You can still use **Revise**.

3. Take a deposit

1. If the order carries a deposit, a **Deposit** box shows **Required**, **Received**, **Still due** and **Status**.
2. Select **Record a deposit**. Choose the **Method** (**Cash** or **Bank transfer**), type the **Amount (PHP)** and, for a bank transfer, the **Bank reference**.
3. Select **Record deposit**. An Acknowledgement Receipt is made for the money. Use **Receipt** next to a payment to look at it again.

4. Reserve and deliver

1. On the sales order, select **Reserve** to set the stock aside. The order becomes RESERVED.
2. When the goods go out, select **Fulfill**. Stock is taken out of the warehouse and the order becomes FULFILLED.
3. To stop an order that is not yet finished, select **Cancel**.

Variations

- A quotation that needs no approval can be sent straight after saving; the **Submit for approval** step is only offered when the quotation needs it.
- Reservation is also attempted on its own right after acceptance. If stock is short, the order stays CONFIRMED and the page lists each short line; select **Reserve** once stock arrives.
- An order can be fulfilled in parts. After a part delivery the order shows PARTIALLY_FULFILLED until every line is delivered.
- A service line is delivered without taking anything from stock.

What happens behind the scenes

- Accepting a quotation creates the sales order in the same step and freezes the prices. See Turn an accepted quotation into a sales order (see Turn an accepted quotation into a sales order).
- Reserving first checks that every stocked line can be covered by stock in the warehouse. If one line cannot, nothing is reserved.
- Fulfilling takes stock from the batches that expire first. If any line lacks stock, nothing leaves stock.
- The status of the order is worked out from what has been delivered: when every line is delivered in full it is FULFILLED, otherwise PARTIALLY_FULFILLED.
- The deposit is a record of money received against the order. It does not change the order status.

Common problems

- **Mark accepted** is greyed out: the quotation has not reached the stage that allows it. The reason shows next to the buttons.
- **Reserve** says there is not enough stock: receive stock first, then reserve again. See Receive stock (see Receive stock).
- **Fulfill** is missing: it shows only when the order is RESERVED and you can update sales orders.
- No **Record a deposit** button: the quotation has no deposit terms, or you cannot record deposits.

Follow a sales order from Draft to Fulfilled

See what each sales order status means and which button moves an order to the next one.

Before you start

- To reserve, fulfil or send an order to production you need the permission to update sales orders. To cancel you need the separate permission to cancel sales orders. A button you cannot use is not shown.
- Create the order first: see Create a sales order (see Create a sales order). An order made from an accepted quotation is covered in Turn an accepted quotation into a sales order (see Turn an accepted quotation into a sales order).

Steps

1. Open **Sales** and go to the orders list (**Sales Orders**). A new order made with **Confirm Sales Order** starts as **DRAFT**. An order made from a quotation starts as CONFIRMED.
2. On a DRAFT or CONFIRMED row, select **Reserve**. The stock for every stocked line is set aside and the status becomes RESERVED. If a line is short, nothing is reserved and the row lists each short line.
3. When the goods go out, select **Fulfill** on the RESERVED row and confirm the box **Fulfill order**. Stock leaves the warehouse. The status becomes FULFILLED when every line is delivered in full, or PARTIALLY_FULFILLED if only part was delivered.
4. To stop an order that is not finished, select **Cancel** and confirm **Cancel order**. A cancelled order cannot be worked on afterwards.
5. For items made to order, select **To Production** and confirm **Send to production**. This creates work orders on the shop floor.

Statuses

Status	Meaning	What you can do next
DRAFT	Just created.	**Reserve**, **To Production**, **Cancel**
CONFIRMED	Created from an accepted quotation, or reservation was short.	**Reserve**, **To Production**, **Cancel**
RESERVED	Stock is set aside.	**Fulfill**, **To Production**, **Cancel**
PARTIALLY_FULFILLED	Some lines were delivered.	**To Production**, **Cancel**
FULFILLED	Everything delivered.	Nothing; **Cancel** is not offered.
CANCELLED	Stopped.	Nothing.

Tips

- There is no invoicing step in Sales yet. The order list has no invoice button, and fulfilling an order does not create an invoice.

- A hardware shop would reserve cut glass and fittings; a café would reserve a catering order's ingredients. The steps are the same.
- A short reservation does not stop you: receive the stock, then select **Reserve** again.

Questions

Q: Why is there no Fulfill button?

A: **Fulfill** shows only when the order is RESERVED and you can update sales orders.

Q: Can I cancel a fulfilled order?

A: No. **Cancel** is hidden for FULFILLED and CANCELLED orders. Contact support@evozo.ph if you need help with a delivered order.

Record a deposit and print its Acknowledgement Receipt

Record money a customer pays up front against an order, and look at or print the Acknowledgement Receipt made for it.

Before you start

- The quotation must be accepted and turned into a sales order. The **Deposit** box appears only on such a quotation, and only if you hold the permission to view deposits.
- To add a payment you also need the permission to record deposits. Without it, **Record a deposit** is not shown.
- The deposit amount due comes from the quotation's deposit terms, fixed when the order was created.

Steps

1. Open **Sales**, go to **Quotations** and open the accepted quotation.
2. Find the **Deposit** box. It shows **Order**, **Required**, **Received**, **Still due** and **Status**.
3. Select **Record a deposit**.
4. Choose the **Method**: **Cash** or **Bank transfer**.
5. Type the **Amount (PHP)**. It must be above zero with at most two decimals.
6. For a bank transfer, type the **Bank reference**. It is required for a bank transfer.
7. Optionally set **Date received** (not in the future) and **Notes (optional)**.
8. Select **Record deposit**.
9. The payment is listed in the box. Select **Receipt** beside it to see the Acknowledgement Receipt, then **Print** or **Close**.

Tips

- The receipt is an Acknowledgement Receipt. It is not an Official Receipt, and the dialog says so.
- A fabrication shop might take a deposit before cutting materials; a café might take one for a catering booking.
- Recording a deposit does not change the order status. See Follow a sales order from Draft to Fulfilled (see Follow a sales order from Draft to Fulfilled).

Questions

Q: Why is there no Deposit box?

A: The quotation is not yet converted to a sales order, or you cannot view deposits. Ask an owner or admin.

Q: Where is the rest of the process?

A: See From quotation to cash and delivery (see From quotation to cash and delivery).

Send the customer link for a quotation

Give a customer a private link to read a quotation and accept it online, without printing or emailing a PDF.

Before you start

- You need the permission to create quotations.
- The quotation must be saved with a customer chosen. Without one, the buttons are disabled and the page says: Choose a customer and save before you submit, approve, send, share or accept this quotation.
- The quotation must be a Draft, Pending approval, Approved or Sent. Other statuses do not offer **Customer link**.

Steps

1. Open **Sales**, go to **Quotations** and open the quotation.
2. Select **Customer link**.
3. The box **Customer link** shows the address once. Select **Copy link** and send it to the customer yourself (chat, message or email).
4. The box tells you the date the link works until. That is the quotation's valid-until date, or 30 days from today if it has none.
5. To stop the link, select **Switch off**. To replace it, select **New customer link**; the earlier link stops working.
6. After the customer answers, open the quotation. It shows the line "Accepted online by" followed by the name the customer typed, or "Rejected:" followed by the reason if the customer declined.

Tips

- The address is shown only when it is made. If you lose it, make a new link.
- Revising the quotation stops the old link. See Revise a quotation (see Revise a quotation).
- If the valid-until date has passed, no link is made: set a new date first.
- When the customer accepts online, the customer types their name and a date that must be today's date.

Questions

Q: Why is Customer link greyed out?

A: A customer is missing, or another action is running. The reason shows beside the buttons.

Q: What happens after online acceptance?

A: The sales order is created at that moment, in the same step as the acceptance, and the quotation moves to Converted. For the staff route, see From quotation to cash and delivery (see From quotation to cash and delivery). Contact support@evozo.ph if unsure.

Revise a quotation

Change a quotation that has already gone through approval or been sent, by making a new revision instead of editing the old one.

Before you start

- You need the permission to create quotations.
- **Revise** is offered when the quotation is Draft, Pending approval, Approved, Sent, Rejected or Expired. It is not offered once accepted.

Steps

1. Open **Sales**, go to **Quotations** and open the quotation.
2. Select **Revise**.
3. In **Revise this quotation**, optionally set **Valid until (optional)**. The date cannot be in the past.
4. Add **Notes** about what changed.
5. Select **Confirm**. A new draft revision opens with the same number and lines.
6. Edit the new draft, then submit, approve and send it again as normal.

Tips

- The earlier revision becomes read-only and shows **A newer revision replaced this one.** with an **Open it** button. The new one shows **Revises an earlier revision.**
- The customer link of the earlier revision stops working. Make a new one: see Send the customer link for a quotation (see Send the customer link for a quotation).
- Select **History** to list every revision and its events. Use it when a customer quotes the number but not the version.
- A caterer may revise after the guest count changes; a fabricator after a drawing changes.

Questions

Q: Can I revise an accepted quotation?

A: No. Accepted quotations create a sales order and are not revised from here.

Q: Does the number change?

A: No. The revision keeps the quotation number; the revision number goes up.

Sales Management: frequently asked questions

Sales quotations FAQ

Answers about quotation statuses, approval, the below-cost rule and expiry.

Questions

What do the statuses mean?

- DRAFT: being prepared; editable.
- PENDING APPROVAL: submitted and locked until an approver approves or returns it.
- APPROVED: ready to send.
- SENT: given or emailed to the customer; prices are frozen.
- ACCEPTED: the customer said yes. Normally the order is made at once, so you will see CONVERTED.
- CONVERTED: a sales order was created from it.
- REJECTED: the customer said no. It can be revised.
- EXPIRED: the **Valid until** date passed while it was SENT. It can be revised.
- SUPERSEDED: replaced by a newer revision (**Revise**); read-only.

Why am I asked for approval?

Your company's approval setting (always, by rules, or never) and its rules decide. When approval is needed, a quotation cannot be marked sent or accepted while it is DRAFT or PENDING APPROVAL. Approvers need the quotation approve permission and a discount level that covers the quotation. Pending items appear under **Approvals**.

Why can't I approve or send?

A customer must be chosen first. The page shows the reason beside the action buttons.

What is the below-cost rule?

A line priced below its allowed minimum keeps the quotation a draft: it cannot be submitted, approved, sent or accepted until the line is raised or a manager covers it. A manager covers it in **Approve below cost** by entering a required **Reason**; the name and reason are recorded in the history and audit log.

When does a quotation expire?

A SENT quotation becomes EXPIRED the day after its **Valid until** date (in the organization's time zone). An expired quotation is never accepted; use **Revise** and accept the new revision.

What does Revise do?

It makes a new draft with the same number and lines. The old revision becomes read-only and its customer link stops working.

Sales order questions

Quick answers about creating and changing sales orders.

Questions

Q: Why can't I see the New Sales Order button?

A: Your role does not include permission to create sales orders. Ask an owner or admin to change your role.

Q: Can I create an order without a customer?

A: Yes. Leave **Customer (optional)** empty to record a walk-in order.