



AI POWERED ORDER MANAGEMENT

USER GUIDE

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1.Introduction

The **AI Powered Order Management App** is a custom-built application developed on the **Zoho Creator platform**, designed to streamline and automate product, brand, and order management processes. The app incorporates **Google Gemini AI** to enable **smart ordering capabilities**, helping users make faster and more accurate ordering decisions.

This document serves as the official functional and technical reference for the Order Management App, detailing its configuration, features, workflows, and smart AI-powered ordering functionality.

The screenshot displays the 'Place Order' form within the AI Powered Order Management App. The interface includes a navigation menu on the left with options like 'ORDERS', 'Place Order', and 'List Of Orders'. The main form area contains fields for 'Order ID' (ORDER-20260430-131454), 'Order Date' (30-Apr-2026), 'Customer' (-Select-), 'Currency' (INR), and 'Exchange Rate' (1.00). A red box highlights the 'AI Based Quick Order' section, which includes a text input field and instructions: 'Type the product name or SKU followed by the quantity, and the system will automatically add it to the order. Examples: 5 Apples, Apples 5, SKU001 10, Mouse 3'. Below this is a table for 'Add Items' with columns for Product SKUs, Quantity, Unit Price, Tax %, and Tax Amount, and a '+ Add New' button. The 'Tax Info' section is also visible at the bottom.

2. Benefits of the extension

The **AI Powered Ordering** feature enhances the ordering process by using **Google Gemini AI** to automate and simplify data entry within the Order Management App.

1. Automated Subform Population

When a user selects a product and enters the required quantity, **Google Gemini AI automatically adds the item to the order subform.**

This eliminates the need for manual subform entry and reduces repetitive user actions.

2. Faster Order Creation

By auto-populating order line items, the system significantly reduces the time required to create orders, especially when handling multiple products.

3. Reduced Human Errors

Manual subform entry often leads to:

- Incorrect product selection
- Quantity mismatches
- Missing line items

AI-driven automation ensures accurate and consistent data entry, minimizing such errors.

4. Improved User Experience

Users interact with a simplified form interface where:

- Product selection is intuitive
- Quantities are instantly processed
- Subform records are created automatically

This results in a smoother and more efficient ordering workflow.

3. Who Is It Meant For?

Sales & Order Teams – To create orders faster without manually adding items to subforms

Business Owners & Managers – To improve order accuracy and operational efficiency

Operations & Inventory Teams – To ensure consistent and error-free product and quantity entries

4. Requirements

- A valid **Google Gemini API Key**
- An active **Zoho Creator account**

5.Installation

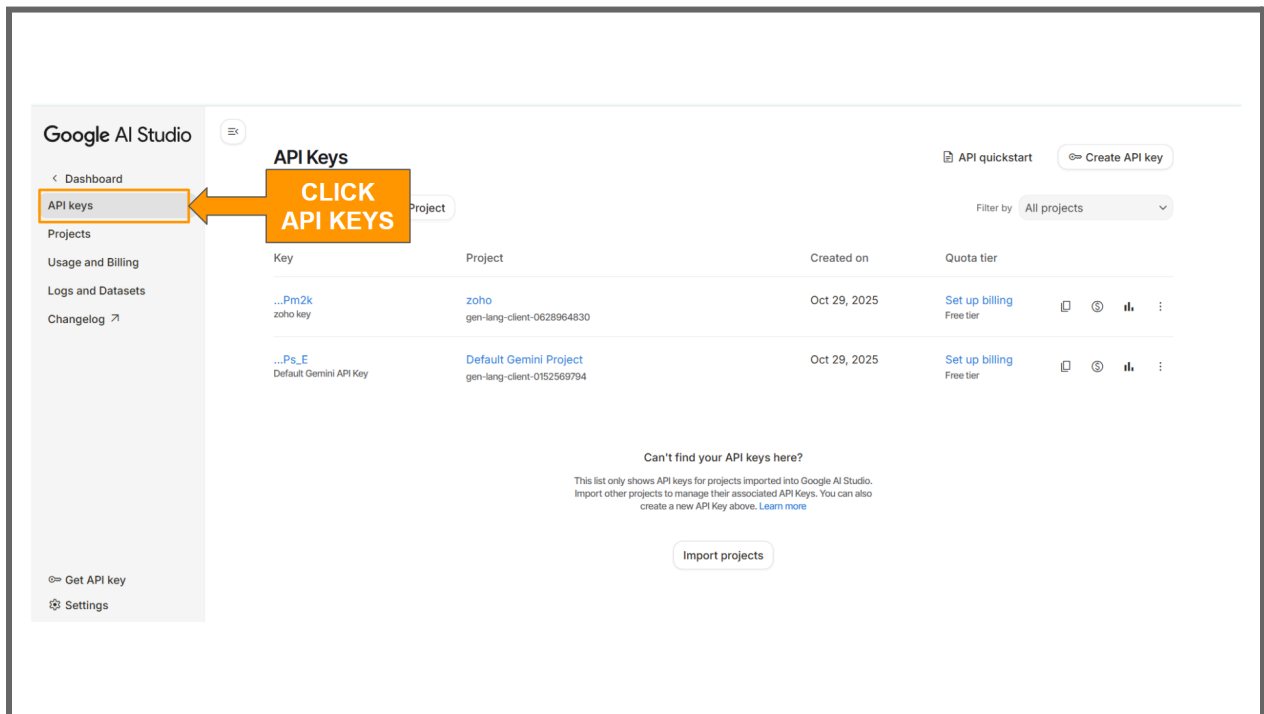
5.1 Getting API Key from Google AI Studio

Step 1:

Sign in to [Google AI Studio](#)

Step 2:

Go to **API Keys**



Step 3: Copy the **API Key**

The screenshot shows the Google AI Studio interface. At the top, there is a browser address bar with "docs.google.com" and a note "To exit full screen, press Esc". The main header includes "Google AI Studio" and a hamburger menu icon. Below the header, there are navigation links: "Dashboard", "API keys" (highlighted), "Projects", "Usage and Billing", "Logs and Datasets", and "Changelog". The "API keys" section is active, showing a "Group by" dropdown set to "API key" and a "Filter by" dropdown set to "All projects". A "Create API key" button is visible in the top right. The main content area displays a table of API keys:

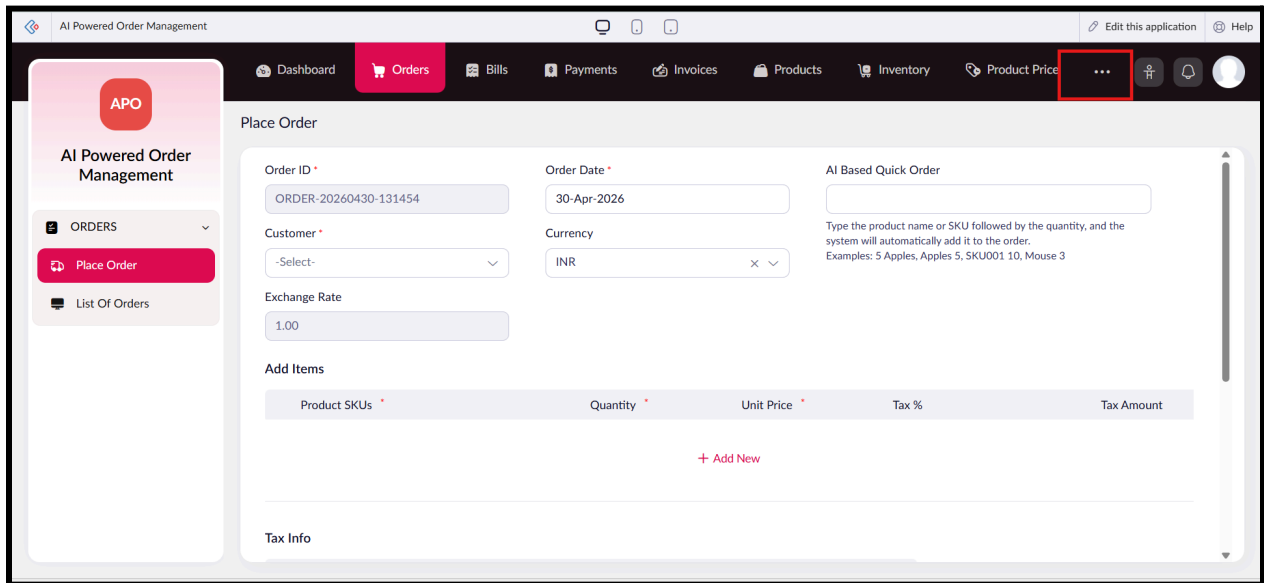
Key	Project	Created on	Quota tier
...Pm2k zoho key	zoho gen-lang-client-0628964830	Oct 29, 2025	Set up billing Free tier
...Ps_E Default Gemini API Key	Default Gemini Project gen-lang-client-0152569794	Oct 29, 2025	

An orange callout box with a white arrow points to the copy icon (two overlapping sheets of paper) in the action menu of the first row. The text in the callout box reads: "Click this to copy the API Key from Google AI Studio". Below the table, there is a message: "Can't find your API keys here? This list only shows API keys for projects imported into Google AI Studio. Import other projects to manage their associated API Keys. You can also create a new API Key above. [Learn more](#)". An "Import projects" button is located at the bottom of the table area.

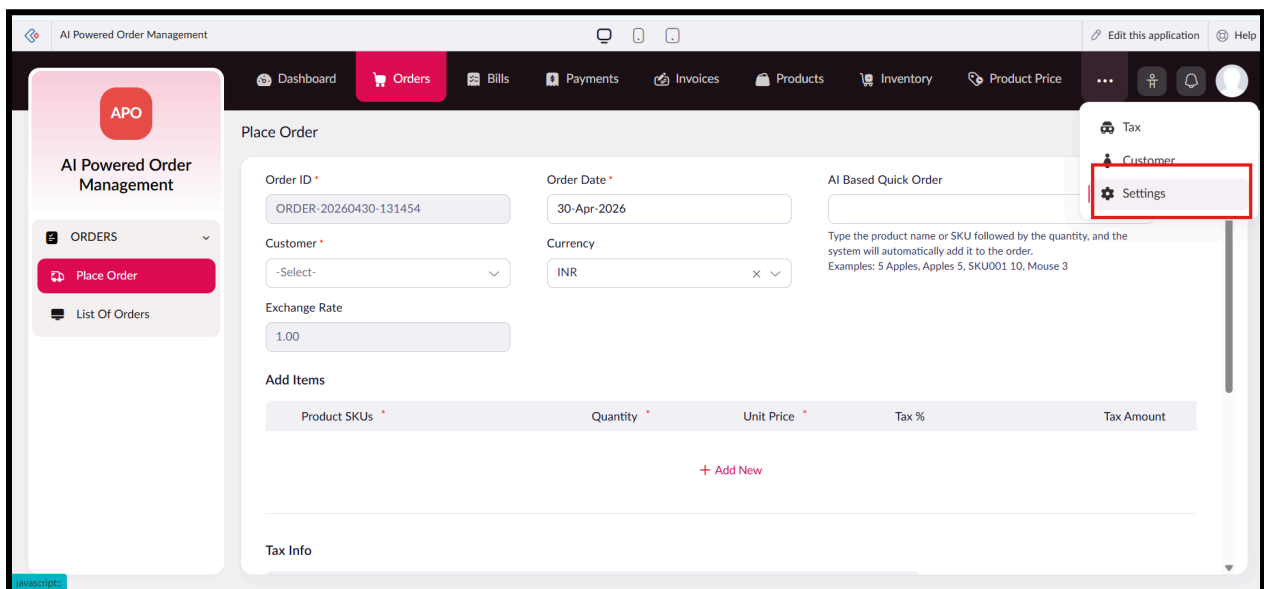
6.How to use the App

6.1 Add API KEY

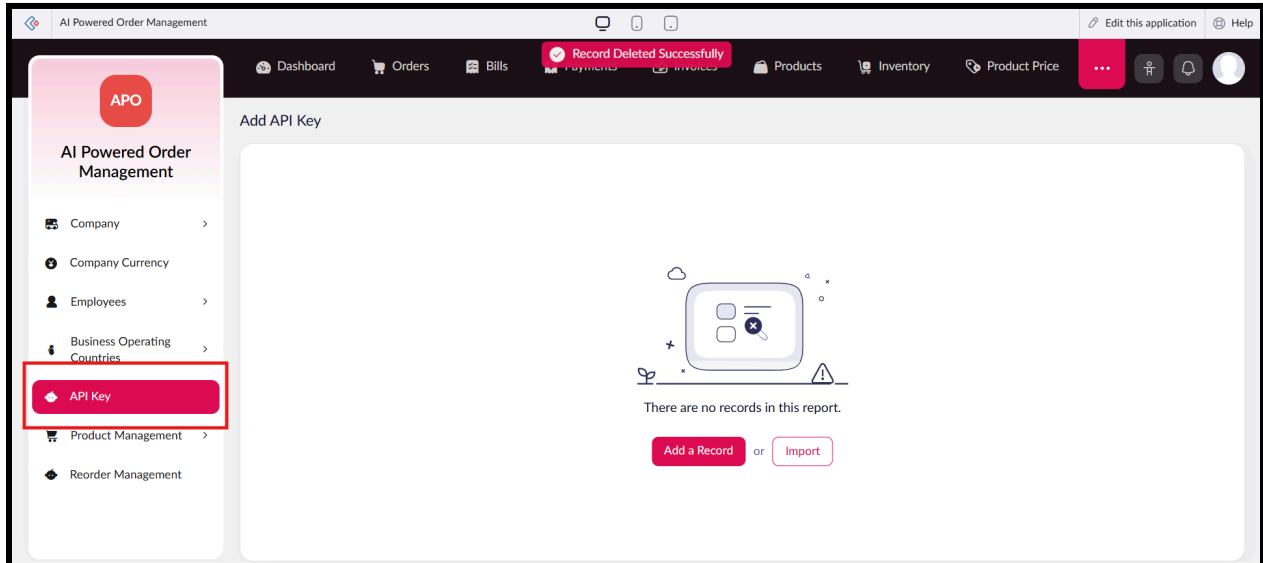
Click on more options menu



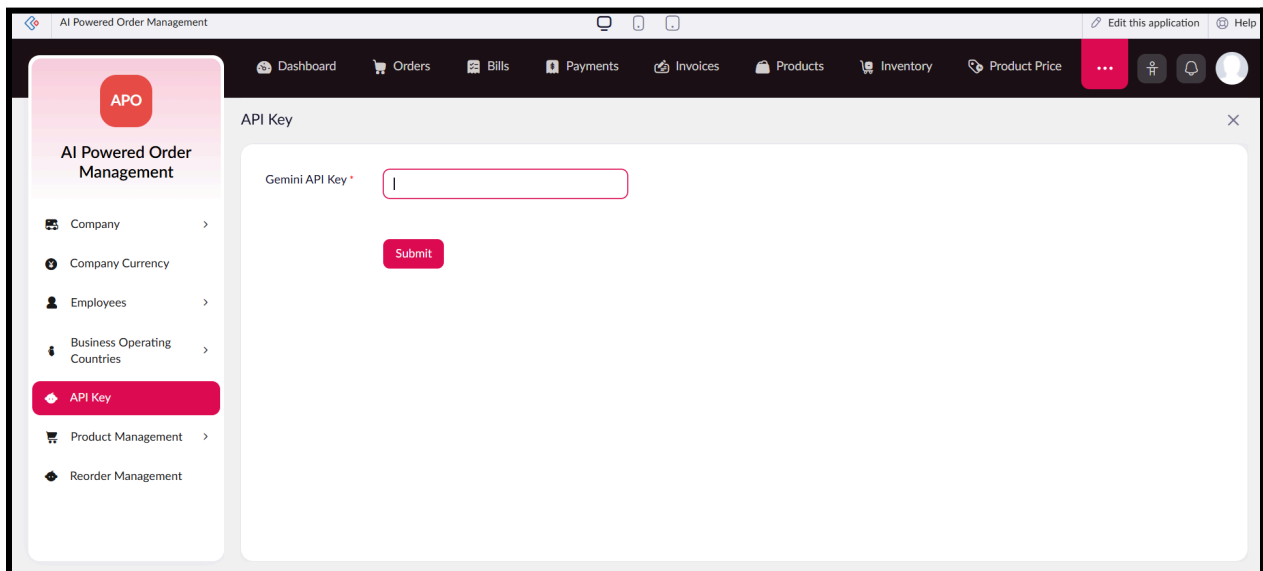
Then select "Settings"



To add API KEY select Add Record in API Key section.



Then enter API Key in text box and click submit.



6.2 Setup Company

Go to Settings page and setup Company.

The screenshot displays the 'Company' setup page in the AI Powered Order Management app. The sidebar on the left contains the following navigation items:

- COMPANY (selected)
- Company
- List Of Companies
- Company Location
- List Of Company Locations
- COMPANY CURRENCY
- BUSINESS OPERATING...
- EMPLOYEE

The main content area is titled 'Company' and contains the following form fields:

- Company Name *
- Company Code *
- Logo * (with a 'Select Image' button and an upload icon)
- Submit button

6.3 Add Company Location

Go to the Settings page and Add Company Location.

The screenshot displays the 'Company Location' setup page in the AI Powered Order Management app. The sidebar on the left contains the following navigation items:

- COMPANY
- Company
- List Of Companies
- Company Location (selected)
- List Of Company Locations
- COMPANY CURRENCY
- BUSINESS OPERATING...
- EMPLOYEE

The main content area is titled 'Company Location' and contains the following form fields:

- Company (dropdown menu with '-Select-' selected)
- Location Code
- Location Name
- Phone (+91 81234 56789)
- Email
- Address
- Address Line 1
- Address Line 2
- City / District
- State / Province

6.4 Setup Currency

This section allows you to add or configure company currencies and designate any currency as the home currency.

The screenshot shows the 'Currency' configuration page. The left sidebar contains the 'COMPANY CURRENCY' option, which is highlighted. The main form area includes the following fields:

- Currency**: A dropdown menu currently showing '-Select-'.
- Country**: A dropdown menu currently showing '-Select-'.
- Symbol**: A text input field containing the symbol '₺'.
- Code**: A text input field containing 'AFN'.
- Exchange Rate**: A text input field containing '#####.##'.
- Home Currency?**: A checkbox that is currently unchecked.

A red 'Submit' button is located at the bottom center of the form.

6.5 Setup Business Operating Countries

In the Business Operating Countries section, you can add the countries where your business operates.

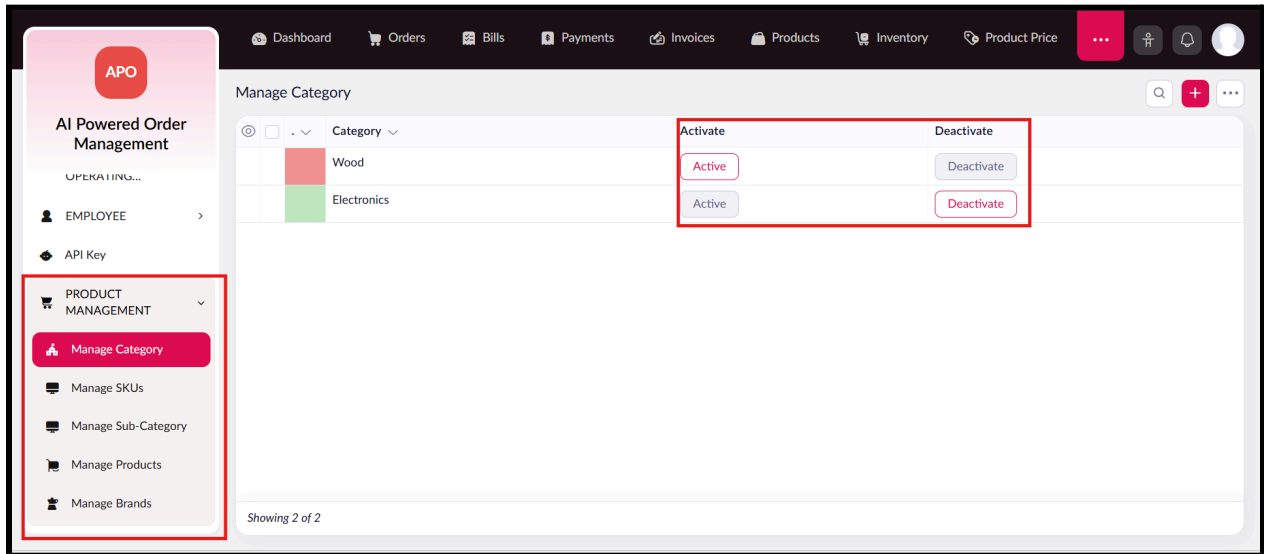
The screenshot shows the 'Business Operating Countries' configuration page. The left sidebar contains the 'Business Operating Countries' option, which is highlighted. The main form area includes the following elements:

- Business Operating Countries**: A section header.
- Country**: A text input field.
- + Add New**: A button to add a new country.

A red 'Submit' button is located at the bottom center of the form.

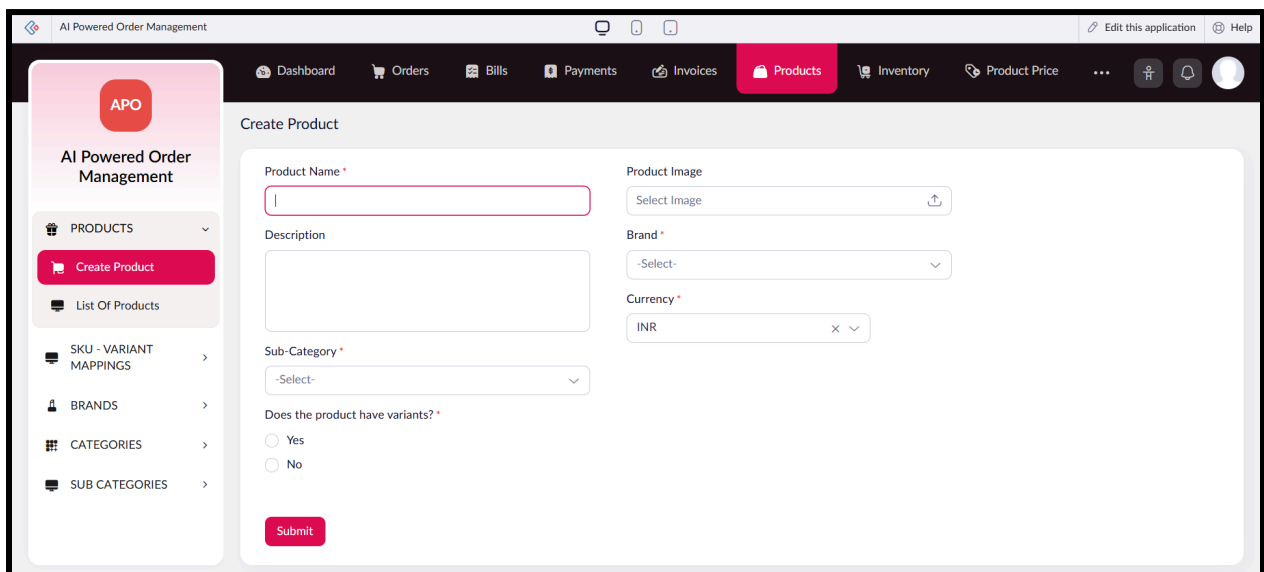
6.6 Product Management

In the Product Management section, you can manage the product catalog by setting categories, subcategories, SKUs, products, and brands as active or inactive.



6.7 Add Product

In the Product section, you can create and manage products



The Product section also allows you to add and manage brands, categories, and subcategories

The screenshot shows the 'Create Product' interface. On the left, a sidebar menu is highlighted with a red box, containing 'PRODUCTS', 'Create Product', 'List Of Products', 'SKU - VARIANT MAPPINGS', 'BRANDS', 'CATEGORIES', and 'SUB CATEGORIES'. The main form area is titled 'Create Product' and includes a currency dropdown set to 'INR', a 'Sub-Category' dropdown, and a 'Does the product have variants?' section with 'Yes' selected. Below this is a 'Product SKUs' table with columns for 'SKU Code', 'Variant', 'Image', and 'Price'. A '+ Add New' button is centered below the table. A 'Submit' button is at the bottom left of the form.

6.8 Product Price

In the Product Price section, you can set product SKU prices based on different countries.

The screenshot shows the 'Price List' interface. On the left, a sidebar menu is highlighted with a red box, containing 'PRICE LIST', 'Price List', and 'List Of Price Lists'. The main form area is titled 'Price List' and includes a 'Product_SKUs' dropdown, a 'Home Currency Price' input field with the value '0', and two dropdowns for 'Countries where the product is available' and 'Countries where the product is not available'. Below this is a 'Price List Configuration' table with columns for 'Country' and 'Price'. A '+ Add New' button is centered below the table. A 'View Log Details' link is at the bottom left, and a 'Submit' button is at the bottom center.

6.9 Add Tax to Product

In the Tax section, you can add taxes and define their rates.

The screenshot shows the 'Tax Master' form within the AI Powered Order Management application. The interface includes a top navigation bar with options like Dashboard, Orders, Bills, Payments, Invoices, Products, Inventory, and Product Price. A left sidebar contains the app logo 'APO' and navigation items for 'TAX MASTER' (with a sub-item 'Tax Master') and 'PRODUCT TAX MAPPINGS'. The main form area is titled 'Tax Master' and contains the following fields: 'Tax Name *' (text input), 'Rate *' (text input with a masked value '#####'), and a checkbox for 'Is_Compound?'. A red 'Submit' button is positioned below the form. A right-hand menu is visible with options for 'Tax', 'Customer', and 'Settings'.

In the Product Tax Mapping form, you can map taxes based on different countries.

The screenshot displays the 'Product Tax Mapping' form in the AI Powered Order Management application. The top navigation and left sidebar are consistent with the previous screenshot. The main form area is titled 'Product Tax Mapping' and features three dropdown menus: 'Product *', 'Tax Master *', and 'Country *', each with '-Select-' as the current selection. A red 'Submit' button is located at the bottom of the form.

7.Use Cases

7.1.Quick Order(AI Assist)

Feature Description: Quick Order

Objective:

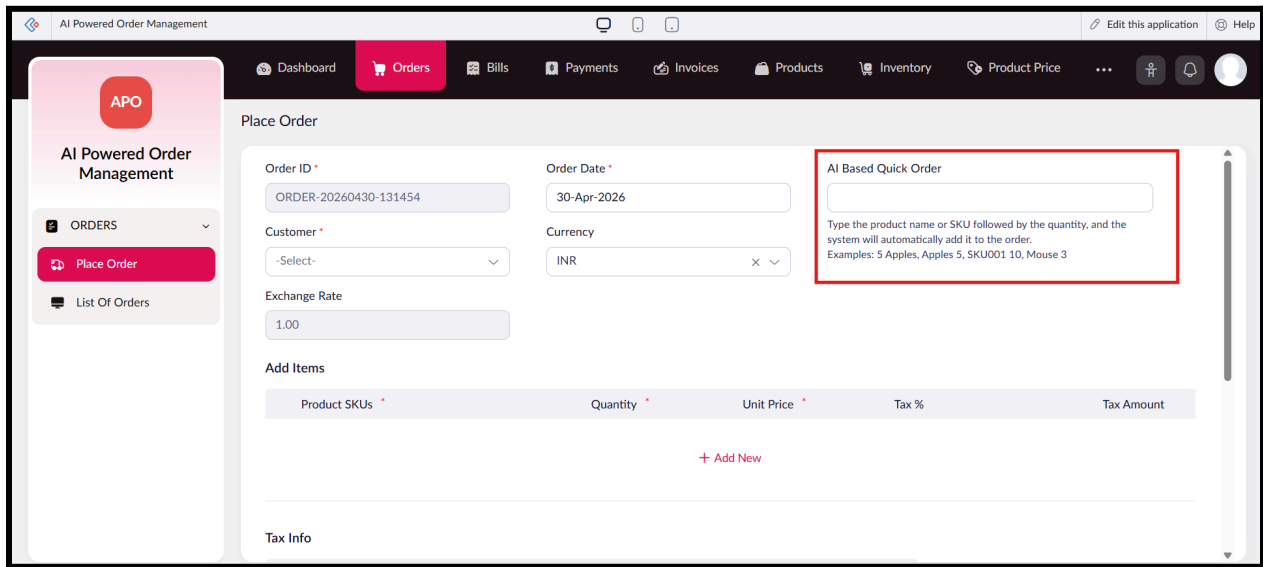
Allow users to quickly enter products for an order by typing **SKU** or **Product Name** with quantity in a single input, and automatically populate the subform with the correct items.

Input Examples:

- **S001 5qty** → Adds SKU **S001** with quantity 5.
- **Mouse 5qty** → Finds all SKUs related to "Mouse" and adds them each with quantity 5.

Behavior:

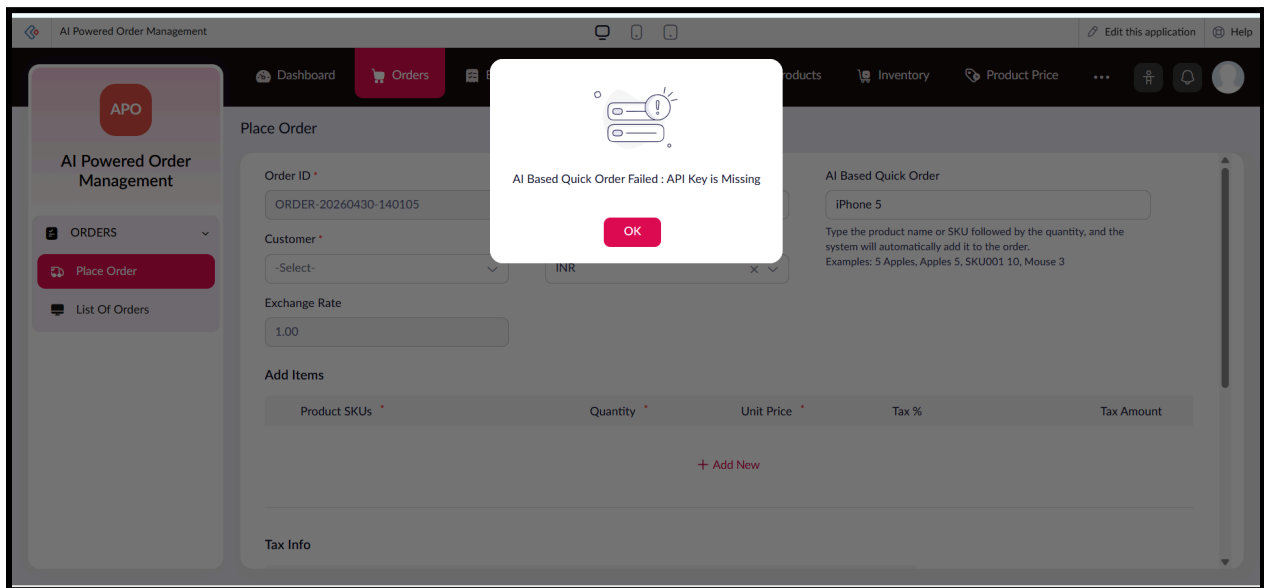
1. The user enters text in an **AI Based Quick Order** field .
2. The system parses the input into:
 - SKU or product name
 - Quantity
3. For a **SKU input**, it adds that exact SKU and quantity to the subform.
4. For a **Product name input**, it:
 - Searches all SKUs related to that product
 - Adds each SKU to the subform with the entered quantity.



8.Troubleshooting

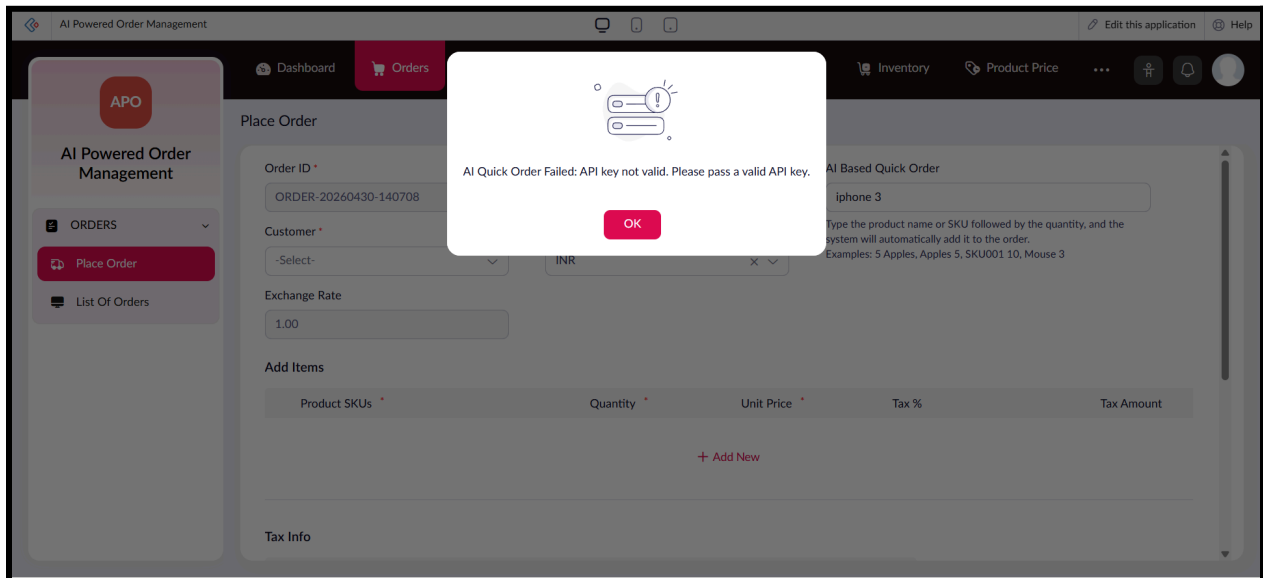
8.1. No API Key

This means you haven't set up an API key, You need to configure API Key to the Extension.



8.2. Invalid API Key

This means you have set up an invalid API key, You need to configure a valid API Key to the Extension. We mentioned the steps below



9.Reporting Errors

- If you face any errors, contact us at hello@cubeYogi.com.
- Please send your query along with a screenshot of the page (ensure any private data is masked).



THANK YOU

Got Any Questions?

Connect with us

Email : hello@cubeyogi.com

Website : www.cubeyogi.com