User Manual

Helix

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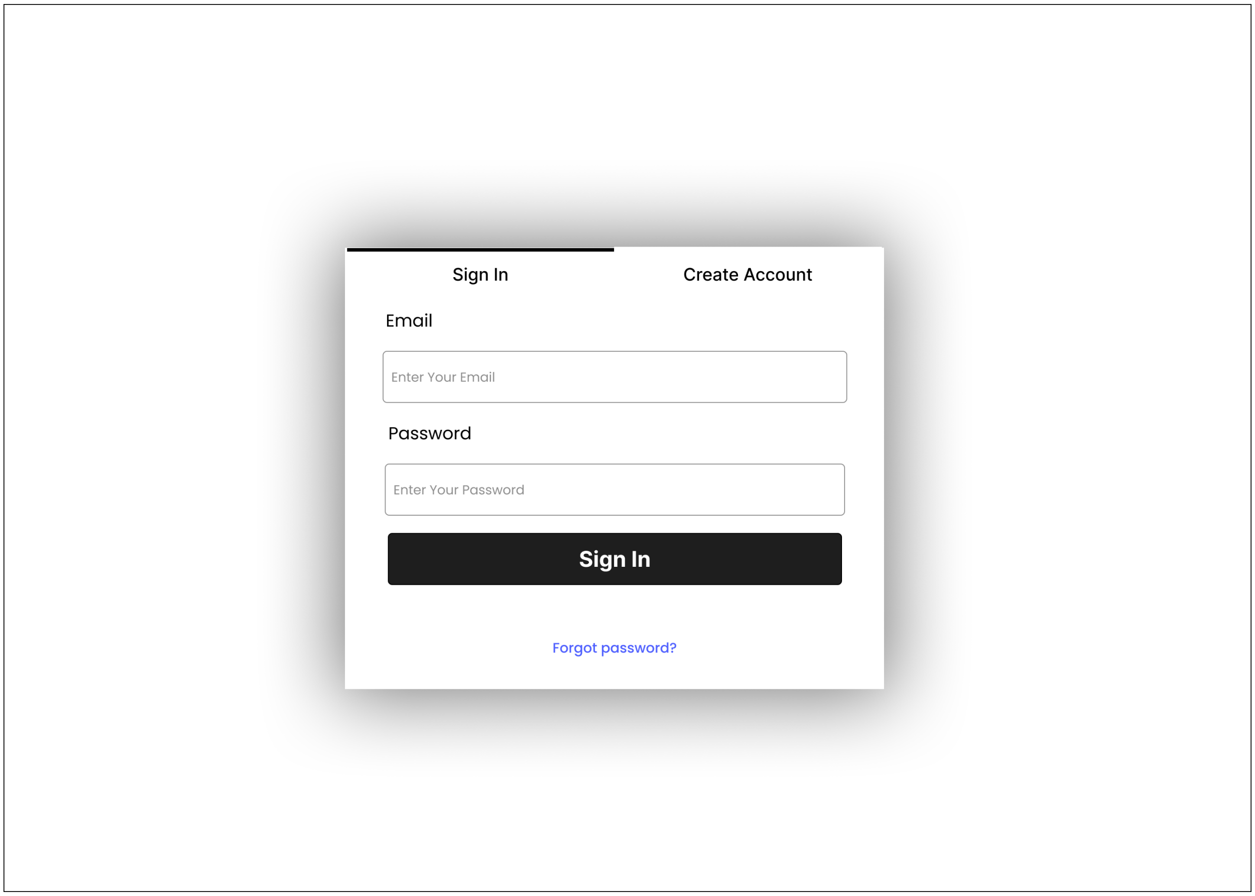
Contents

1 Introduction

The purpose of this document is to assist users in becoming familiar with our application and to ensure that they have a flawless experience using our various features throughout. We will break it down into simple components as to simplify the process.

2 Sign In



2.1 Navigate to Sign In

Through the link:

1. The link will be received from the team admin when they have created and account for their company and added you to the team through the interface.
2. Click on the link and it will take you to the Sign In page.

Through the users own initiative:

1. Users that want to sign in without the use of a link must either be an admin or they should have previously signed in using the link.
2. Simply open the application in your browser and it will take you to the Sign In page.

2.2 Sign In process

1. The user will navigate to the Sign In page through one of the methods stated under the Navigate to Sign In heading.
2. The page will have an input box for your email and your password.
3. The user should fill in their email and password.
4. If the provided details are both filled the user will now be able to press the Sign In button to allow them to take further actions on the actual system(only if the details provided are correct).
5. If its their first time signing in and they are not the admin they will also be added to the correct team once they have been validated.
6. If the details are incorrect the user will be notified with error messages over the field that they have provided incorrect details to.
7. The user can choose to try again to correctly input the details.

2.3 Forgot Password Process

1. If a user has not been given a password or has forgotten it they can press the 'forgot password?' link.
2. This will firstly send an email to the admin user of the team the email provided is apart of to make the the admin aware of the sign in attempt.
3. The user asking for the change will also receive a mail to verify the account and to change the password.
4. Then redirects them to the reset password page.
5. There they should follow the reset password section of the manual.

2.4 Navigate to Create Account from Sign In

1. If an account has not been created the user can choose to click on the Create Account tab at the top of the form to take them to the Create Account page.
2. There the user should follow the Create account steps provided.

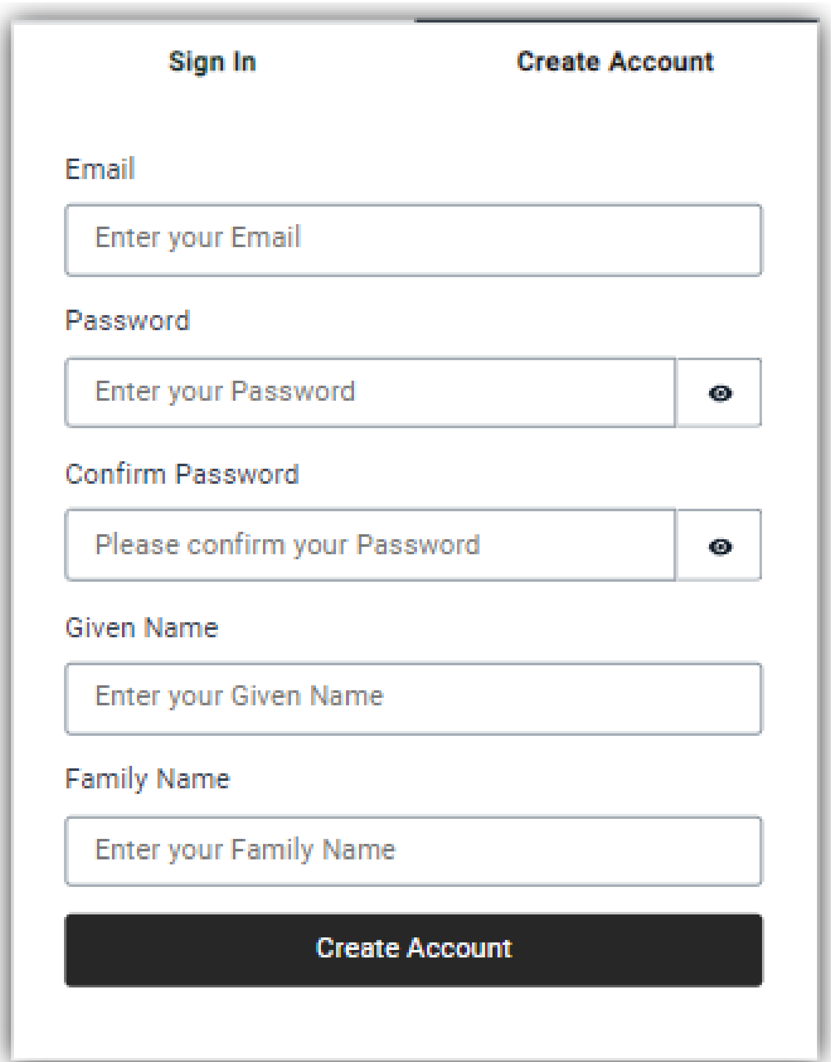
3 Create Account

3.1 Navigate to Create Account

An admin user will be brought to this page when they open the app at their own volition, allowing them to take further action.

3.2 Create Account Process

1. The user will see a Create Account page with 5 input boxes. These input boxes are for the admins email, password, a repeat of the password, Name and Surname.
2. The admin user will enter their name, surname, the companies name, their email or the companies email, a password and be asked to repeat that same password in the corresponding fields.
3. The admin is asked to repeat the password for validation purposes and to make sure correct password is given.
4. The user will now be able to press the Create Account button to allow them to take further actions on the actual system(only if the details provided are correct).



5. If the details are incorrect the admin user will be notified with error messages over the field that they have provided incorrect details to.

6. The admin user can choose to try again to correctly input the details.

3.3 Navigate to Sign In from Create Account

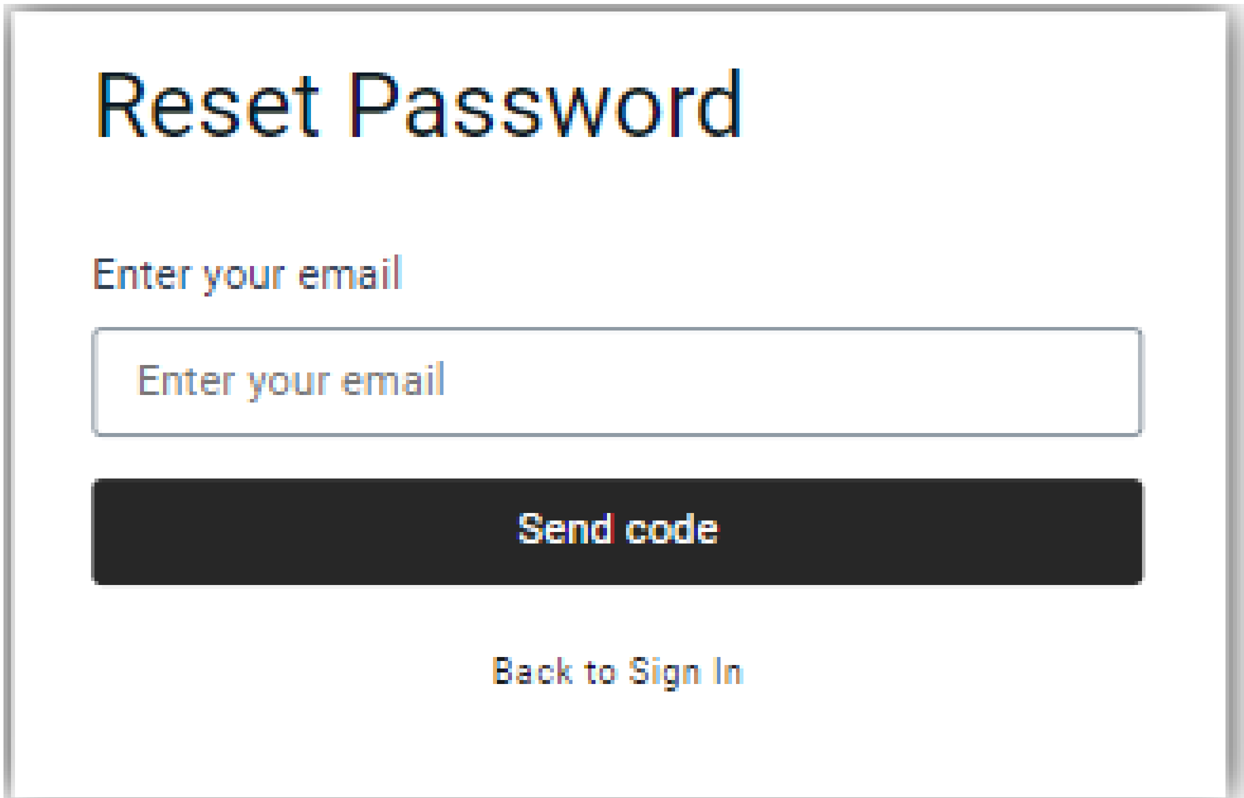
1. If an account has been created the user can choose to click on the Log In tab at the top of the form to take them to the sign in page into an account.

2. There the user should follow the Sign In account steps provided.

4 Forgot Password

4.1 Forgot Password Process

1. A user will be brought to this page either through when "forgot password?" link is pressed on the sign in page.



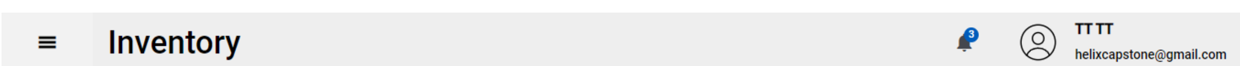
2. The user will need to provide their email to get email for verification code.
3. Once input is provided and is correct they can press the send code button to receive the code to change their password.

4.2 Navigate Back to Sign In page

1. User should click on he ”Back to sign in” link redirecting them to sign in.

5 Page Similarities

5.1 Header



- The top left large text found in the header is a descriptor for the current page that you are on.
- The top right corner displays the current user’s name (e.g., John Doe) and email, indicating who is logged into the dashboard.
- Next to the user details you can find a bell icon where you can access notifications.

5.2 Sidebar

The side bar can be found on the left hand side of the page. It is used for navigation between pages.The sidebar navigation options are to:

Figure 1: Closed Sidebar

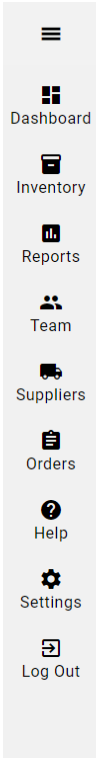


Figure 2: Expanded Sidebar

- Dashboard: The home icon represents the dashboard. Overview of activities and customization of what activities you would like to keep track of in the same place.
- Inventory: The table icon is used to represent the inventory tab. This is the inventory that the business possesses. Here inventory can be added and removed. Excel spreadsheets can be imported or exported. User can also search for inventory as well as filter it.
- Reports: Analytics and reports for different types of information.
- Suppliers: The truck icon represents the suppliers tab. This is where the suppliers for the company can be found. Suppliers can be added and removed. Suppliers can be contacted with here as well as track suppliers.
- Orders: This is where the order for the company can be found. Orders can be added and removed. Orders can be tracked and excel spreadsheets can be imported and exported.
- Settings: The gear icon is the settings choice. This is where personalization of your account is achieved.
- Help: For basic help with the app.
- Log Out: The bottom most button is the log out button so that a user can log out of their account for security purposes.

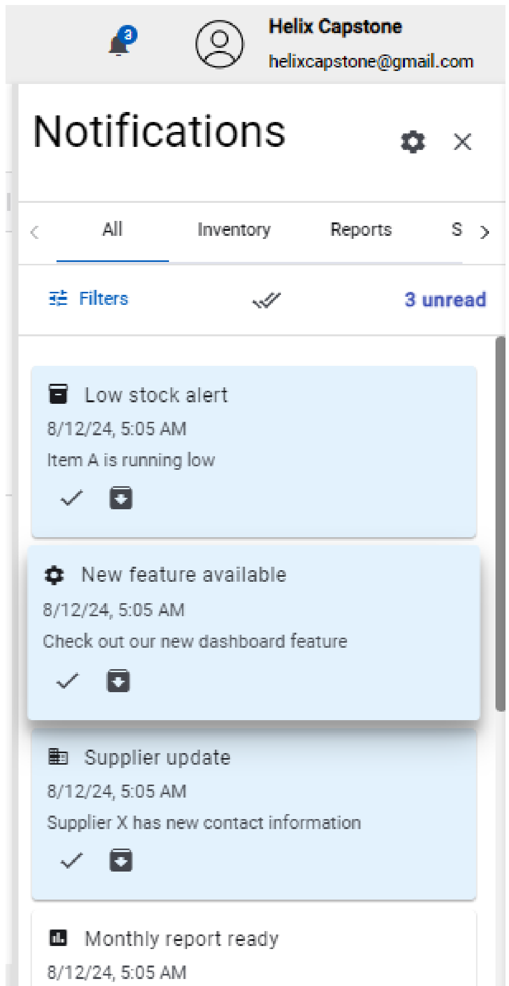
5.2.1 Close Sidebar

The sidebars default is to be open to close it for more space you can click the hamburger button at the top of it which should collapse it.

5.2.2 Open Sidebar

The sidebars default is to be open but if it has been closed you can click on the hamburger menu to open it on your page once again.

5.3 Notification



Can be accessed by clicking on the bell icon found in the header next to the user details.

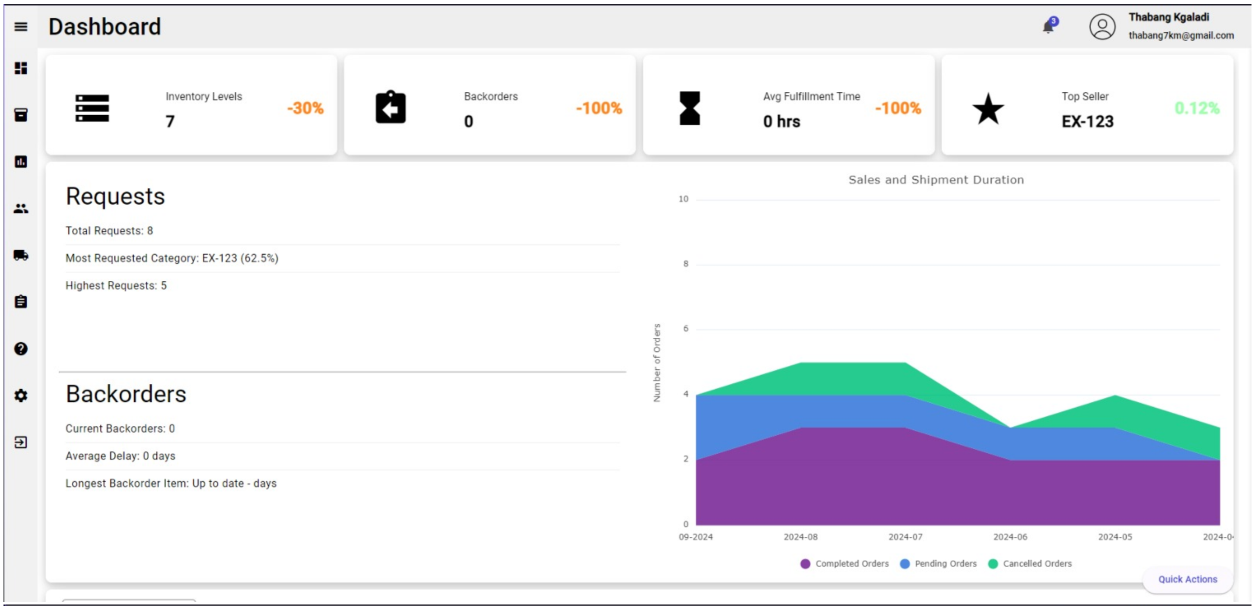
6 Dashboard

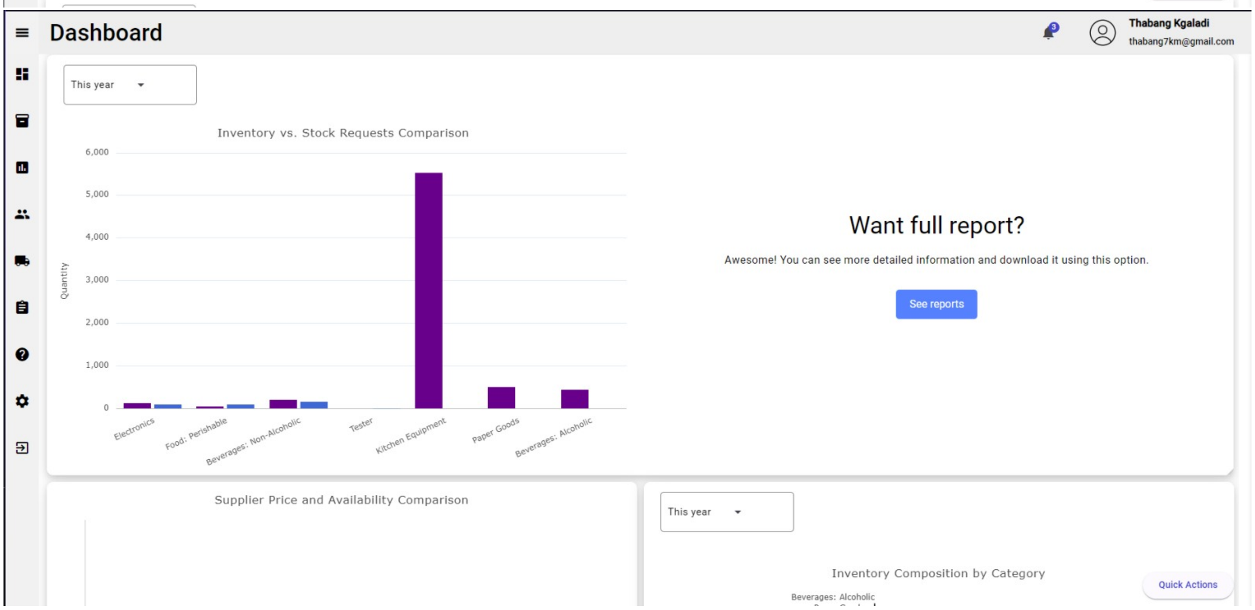
6.1 About

Once an account is created or a user signs in they will be taken to the Dashboard page. It provides a comprehensive view of key performance indicators and metrics essential for managing inventory and order fulfillment.The home icon represents the dashboard. Overview of activities and customization of what activities you would like to keep track of in the same place.

6.2 Navigate to Dashboard

1. From all pages there is a sidebar on the leftmost pane.





2. To expand the sidebar a user can hover their cursor over or click the top most icon to expand it.
3. Once expanded the user will be able to read the page titles.
4. Click the icon above Dashboard to navigate to the dashboard page.
5. It is not necessary to expand to click on the icon you can just click on the icon.

6.3 Chart options

- Bar Chart: Select this option to add a bar chart widget to your dashboard.
- Donut Chart: Choose this option to add a donut chart widget to your dashboard.
- Area Chart: Select this to add an area chart widget to the dashboard.

6.4 Quick Actions

The "Quick Actions" button is located in the bottom left corner. Most of the functionality for all pages can be found here.

6.5 Add Widget

1. Firstly locate the quick Actions button.
2. Then hover over the add widget option to see further choices such as 'Bar Chart', 'Donut Chart', and 'Area Chart' to add these specific widgets to the dashboard.
3. Make your selection and click on it then position it on the dashboard by dragging and dropping.

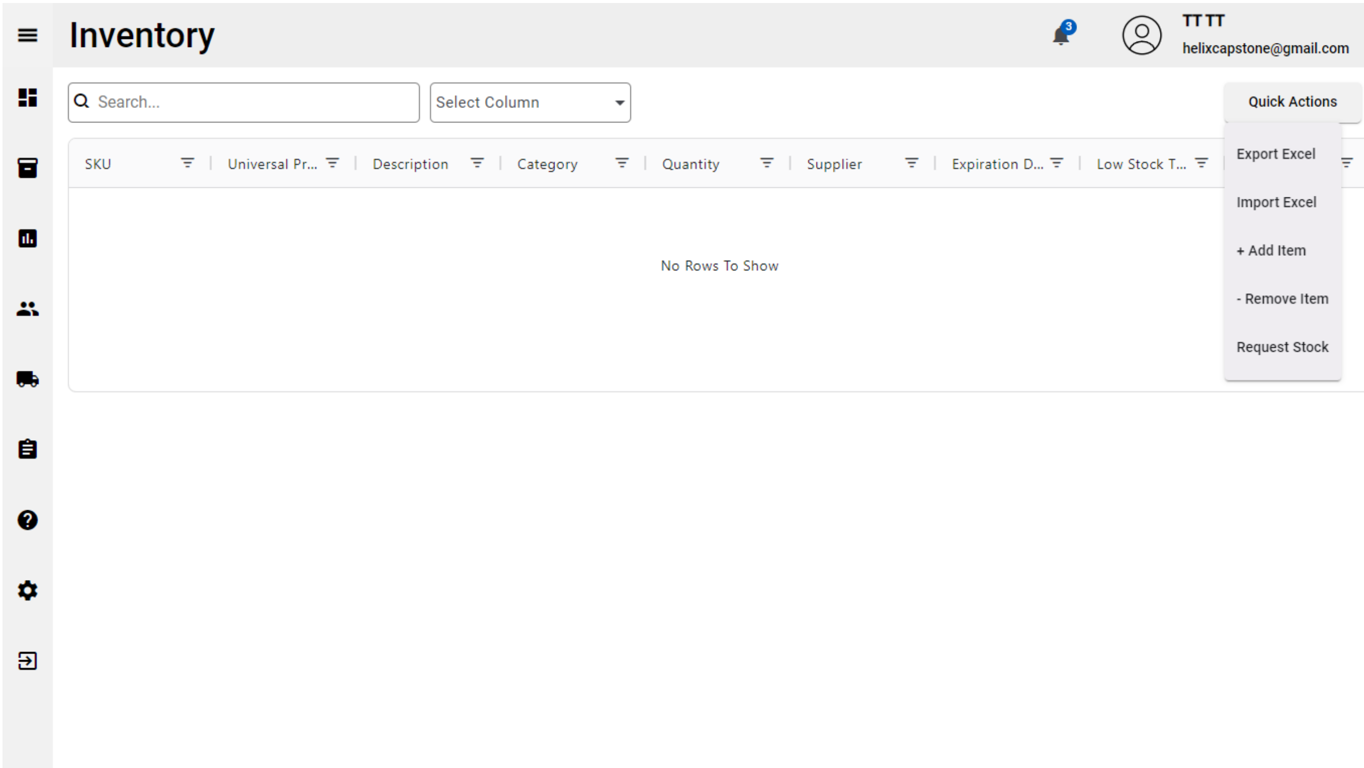
6.6 Remove Widget

1. The "Delete a Widget" option allows you to remove widgets you no longer need from the dashboard. This action helps streamline your dashboard's interface by keeping only the most useful information visible. Here's how to use this feature:
2. Firstly locate the quick Actions button. Then click on it.
3. Select the "Delete a Widget" option from the Help Options menu. This will trigger a modal where all dashboard widgets are displayed.
4. Each widget in the deletion interface will have a small trash can icon next to it.
5. Click the trash can icon for each widget you wish to delete. Clicking the icon will mark the widget for deletion, indicated by a visual change (such as the widget being greyed out or a check-mark appearing on the icon).
6. After selecting the widgets you want to delete, you have two options:
   - Confirm Deletions: Click the "Confirm Deletions" button to permanently remove the marked widgets from your dashboard.
   - Undo: If you change your mind, you can click the "Undo" button to unmark any widgets selected for deletion and keep them on your dashboard.
7. Upon confirming the deletions, the widgets will be removed, and a user will be taken back to the dashboard.
8. If you choose to undo the deletion, the widgets will remain on your dashboard as before, and no changes will be made.

7 Inventory

7.1 Navigating to Inventory

1. From all pages there is a sidebar on the leftmost pane.
2. To expand the sidebar a user can hover their cursor over or click the top most icon to expand it.
3. Once expanded the user will be able to read the page titles.
4. Click the icon above Inventory to navigate to the inventory page.
5. It is not necessary to expand to click on the icon you can just click on the icon.



7.2 About

7.2.1 Purpose

The Inventory page is the page where basic inventory management is performed.

7.2.2 Column names intended use

SKU Product ID Category Description Quantity

7.3 Quick Actions

The "Quick Actions" button is located in the top right corner. Most of the functionality for all pages can be found here.

7.4 Add Item

1. If the user wants to add an item to the inventory they should firstly locate the Quick Actions button.
2. Once located click on the button. Then a drop down will appear below the button.
3. Then they should select the "Add Item" option in the drop-down.
4. This will open a pop up for the user to add details regarding the item they would like to add.
5. Once filled in the user can add the Item by clicking the submit button.
6. User can also cancel the add by clicking Cancel button in the form.

7.5 Remove Item

1. If the user wants to remove an item to the inventory they should firstly click on the item they would like to remove. Once the row is highlighted in blue.
2. Then the user should locate the Quick Actions button.
3. Once located click on the button. Then a drop down will appear below the button.
4. Then they should select the ”Remove Item” option in the drop-down.
5. This will open a pop up for the user to confirm the deletion.
6. The user can remove the Item by clicking the yes button.
7. User can also cancel the remove by clicking Cancel button in the form.

7.6 Remove Multiple Items

1. If the user wants to remove an item to the inventory they should firstly the user should hold in the ”CTRL” key on their keyboard and click on the items they would like to remove.
2. Once the rows are highlighted in blue and all the rows are selected user can release the ”CTRL” key.
3. Then the user should locate the Quick Actions button.
4. Once located click on the button. Then a drop down will appear below the button.
5. Then they should select the ”Remove Item” option in the drop-down.
6. This will open a pop up for the user to confirm the deletion.
7. The user can remove the Items by clicking the yes button.
8. User can also cancel the remove by clicking Cancel button in the form.

7.7 Edit Item

1. To edit a user must simply double click on the cell that they would like to adjust.
2. This will highlight the cells contents in blue allowing them to change the contents.
3. Once a user is satisfied the user should press enter to update the value.

7.8 Request Item

1. If the user wants to request an item to the inventory they should firstly click on the item they would like to request. Once the row is highlighted in blue.
2. Then the user should locate the Quick Actions button.
3. Once located click on the button. Then a drop down will appear below the button.
4. Then they should select the ”Request Item” option in the drop-down.
5. This will open a pop up for the user to provide the quantity of stock they would like to request.
6. The user should fill it in and press confirm to request.
7. User can also cancel the request by clicking Cancel button in the form.

7.9 Sort and Filter

1. To sort a column all a user has to do is click on the column heading of the column they want to sort according to.
2. The arrow will be visible so a user can be aware of if its ascending or descending order.
3. To filter the user must press on the filter icon that will be visible when hovering over the column heading and filter according to their choice.

7.10 Search and Select

1. The search and select options can be found in the top left side of the page above the table.
2. A user can search for and item by firstly selecting a column they would like to search.
3. Once they have selected the column from the drop-down they must enter what they would like to search for in the search bar.
4. As the user types it will adapt the table to contain the matching results.

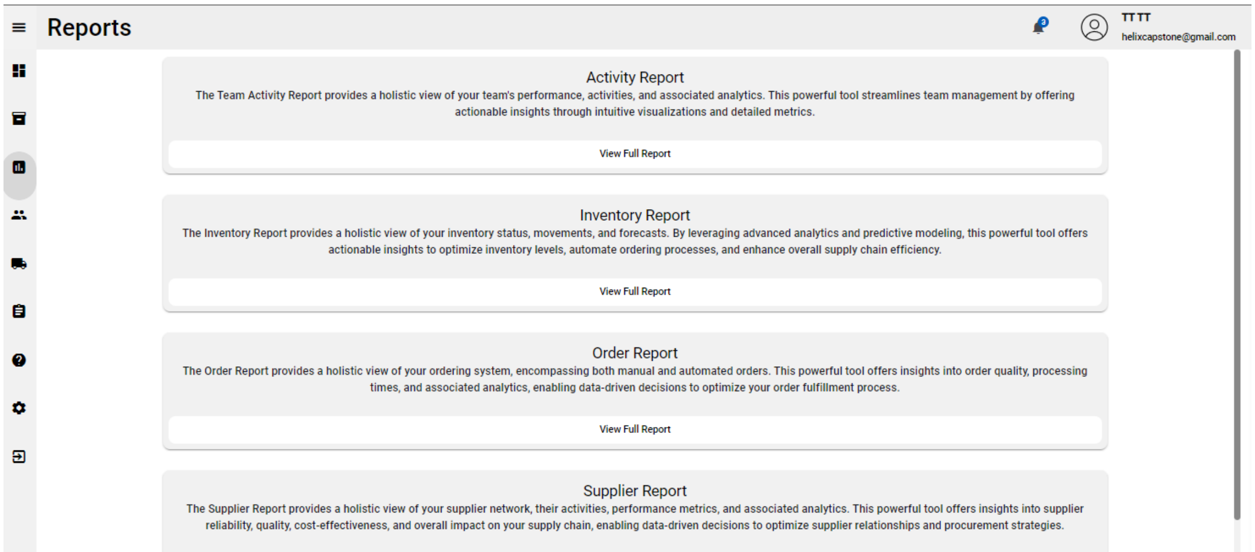
7.11 Export

1. To export to excel the user should click on quick actions to see the drop down.
2. Then they should select the "Export to excel" option.
3. This will automatically download the file to their downloads on their device.

7.12 Import

1. To import to excel the user should click on quick actions to see the drop down.
2. Then they should select the "Import to excel" option.
3. This will open a pop up for the user to select a file to import into the table.

8 Reports



8.1 About

8.1.1 Purpose

The Reports page is the page where basic reporting for orders, inventory, supplier and activity can be found.

8.1.2 Type of Reports

- Order Report: Contains data and analytics pertaining to orders of the team and automated orders as well.
- Supplier Report: Contains data and analytics pertaining to suppliers of the team.
- Activity Report: Contains data and analytics pertaining to members of the team.
- Inventory Report: Contains data and analytics pertaining to inventory of the team.

8.2 Navigating to Reports

1. From all pages there is a sidebar on the leftmost pane.
2. To expand the sidebar a user can hover their cursor over or click the top most icon to expand it.
3. Once expanded the user will be able to read the page titles.
4. Click the icon above Reports to navigate to the reports page.
5. It is not necessary to expand to click on the icon you can just click on the icon.

8.3 Navigate to a specific report

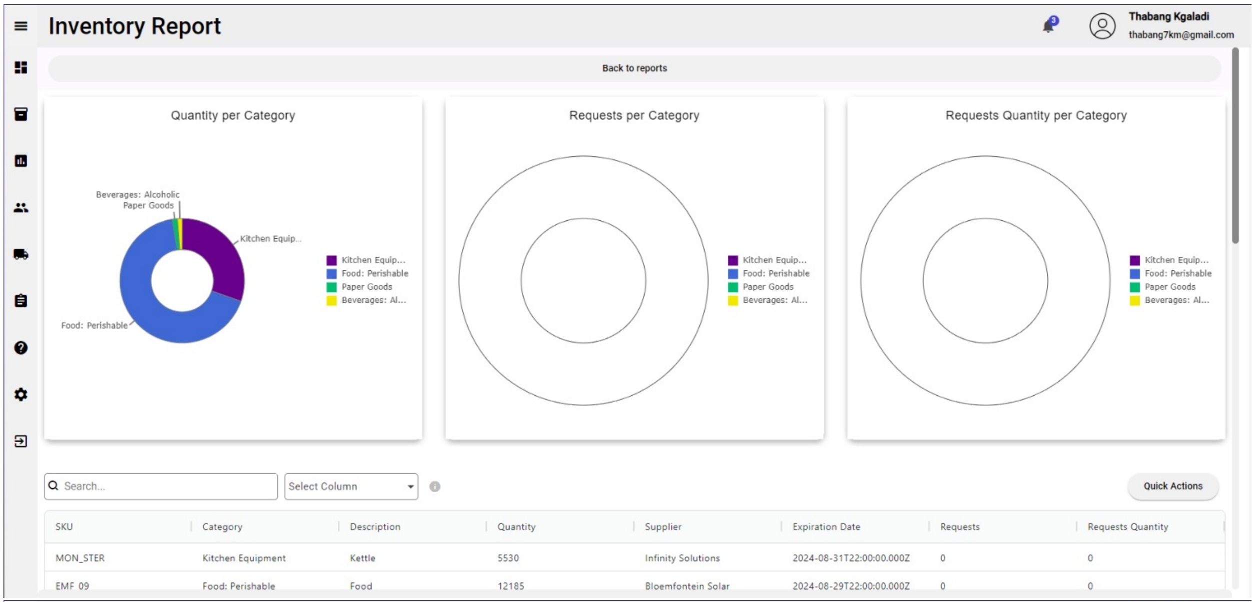
1. From the main reports page click on the view full report under one of the listed reports you want to navigate to.
2. This will take you to the report you chose.

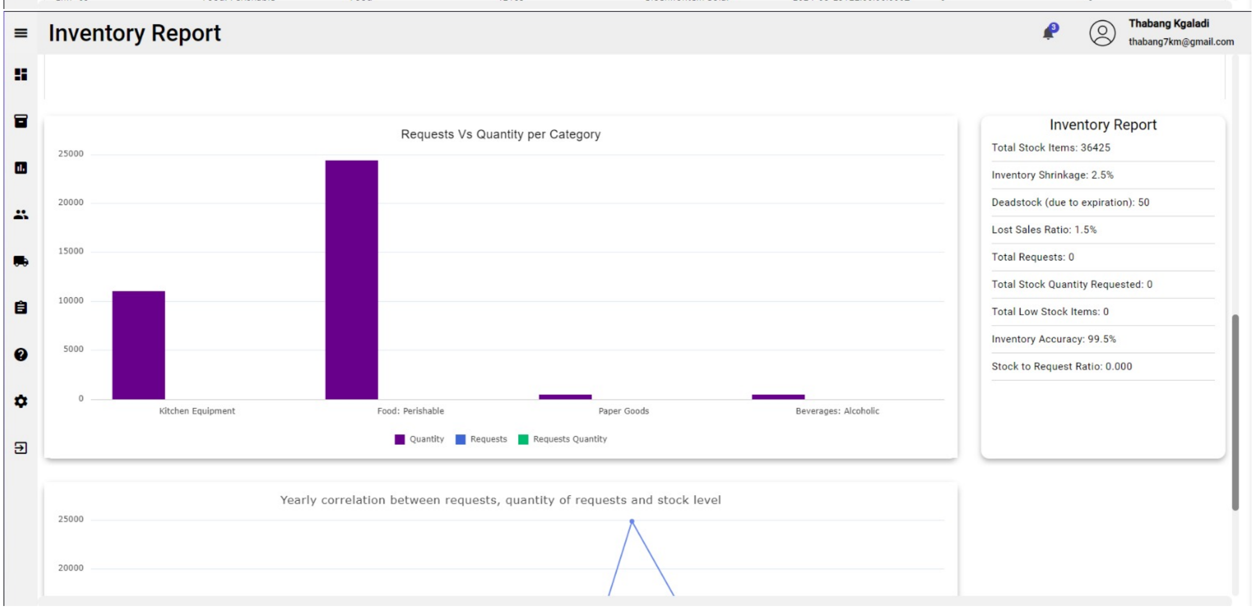
9 Inventory Report

9.1 Metrics

The Inventory Report includes the following metrics:

- Total Stock Items
- Total Requests
- Total Stock Quantity Requested
- Total Low Stock Items
- Inventory Accuracy
- Stock to Request Ratio
- Inventory Shrinkage
- Dead-stock (due to expiration)
- Lost Sales Ratio





9.2 Graphs

The Inventory Report graphing:

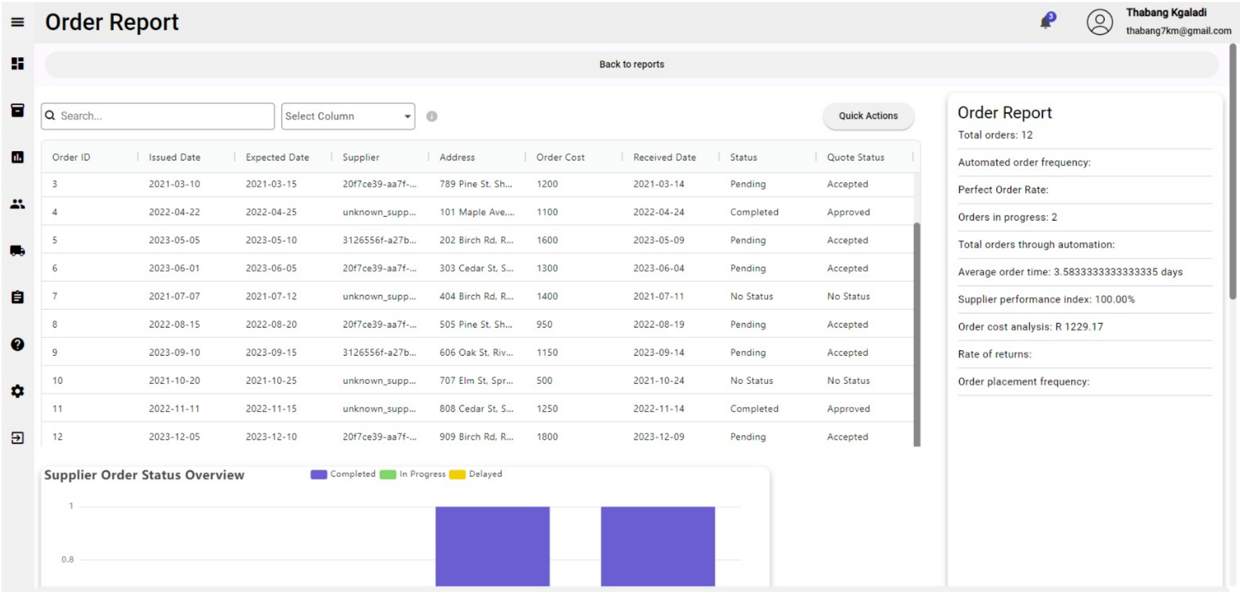
10 Order Report

The Order Report is not explicitly defined in the provided code. It may be part of the Inventory Report or a separate feature not included in the given files.

11 Supplier Report

11.1 Metrics

The Supplier Report includes the following metrics:



- Average supplier performance
- Overall product defect rate
- Worst performer
- Average delivery rate
- Fill Rate
- Total inventory turnover
- Critical/Major/Minor Defect Rate
- "Right First Time" Rate
- On-time Order Completion Rate

Where to find the metrics:

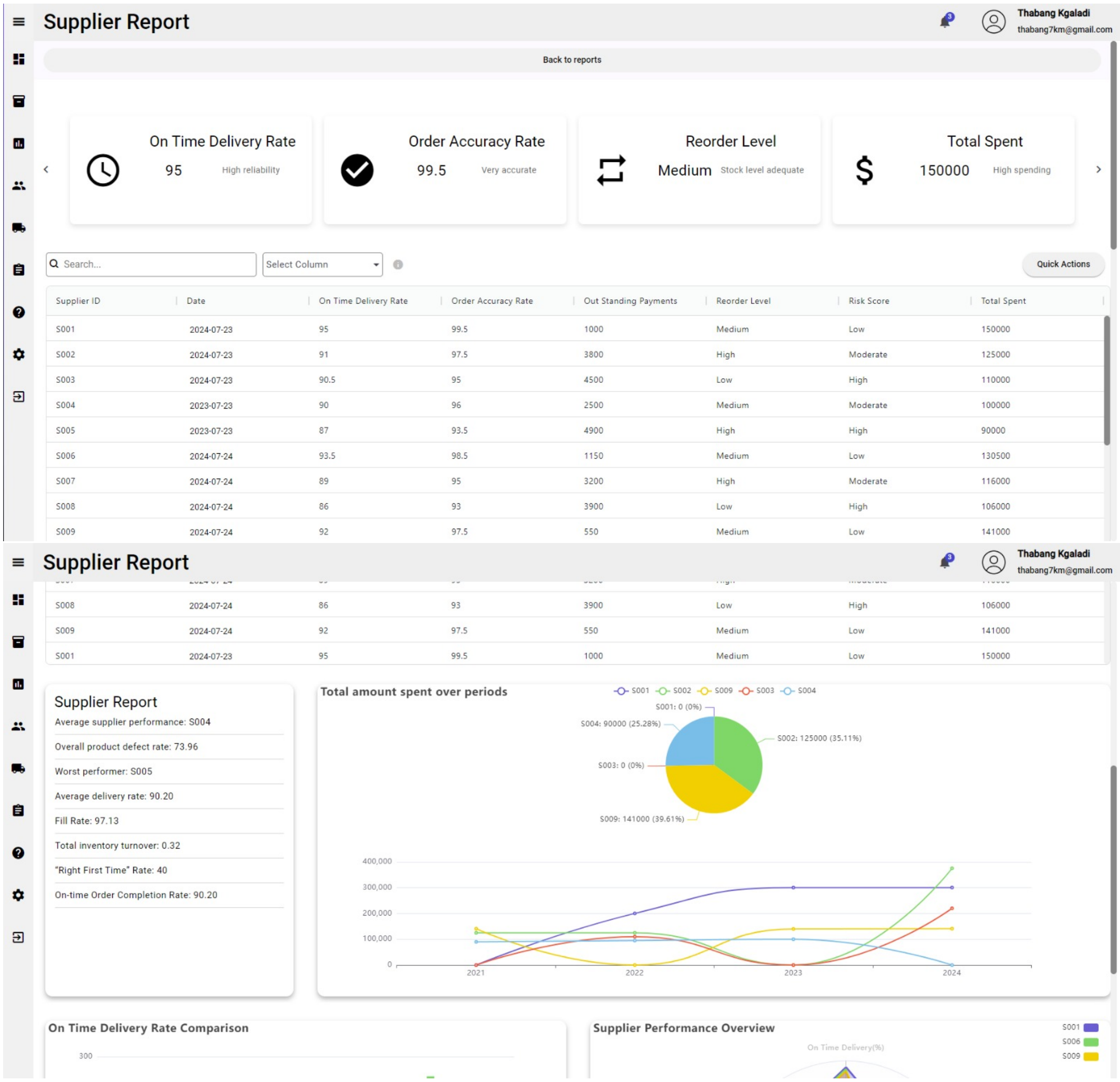
- The top of the page shows cards containing the most useful metrics.
- To view more metrics, click on the arrows on the leftmost or rightmost of the cards to switch to more metrics.
- The metrics can be found in a more readable format if you scroll down the page past the table, stacked on top of one another.

11.2 Graphs

The Supplier Report graphing:

Where to find the graphs:

- To view the graphs, scroll down to below the table.



11.3 Table

The Supplier Report includes a table with the following columns:

- Supplier ID
- Date
- On Time Delivery Rate
- Order Accuracy Rate
- Outstanding Payments
- Reorder Level
- Risk Score
- Total Spent

11.4 Export

The export functionality for the Supplier Report is not explicitly defined in the provided code.

11.5 Navigate Back

To navigate back to the reports page:

1. Scroll to the top of the page.
2. Find the button that says "Back to Reports" at the top of the page.
3. Click the button to be navigated back to the reports page.

12 Activity Report

12.1 Metrics

The Activity Report includes the following metrics:

- Total Activities
- Unique Members
- Average Activities per Member
- Latest Activity

12.2 Graphs

The Activity Report includes the following graphs:

- Actions by Member (Pie Chart)
- Action Types (Pie Chart)
- Activities by Member (Pie Chart)

12.3 Table

The Activity Report includes a table with the following columns:

- Member ID
- Name
- Role
- Action
- Timestamp
- Details

12.4 Export

The export functionality for the Activity Report is not explicitly defined in the provided code.

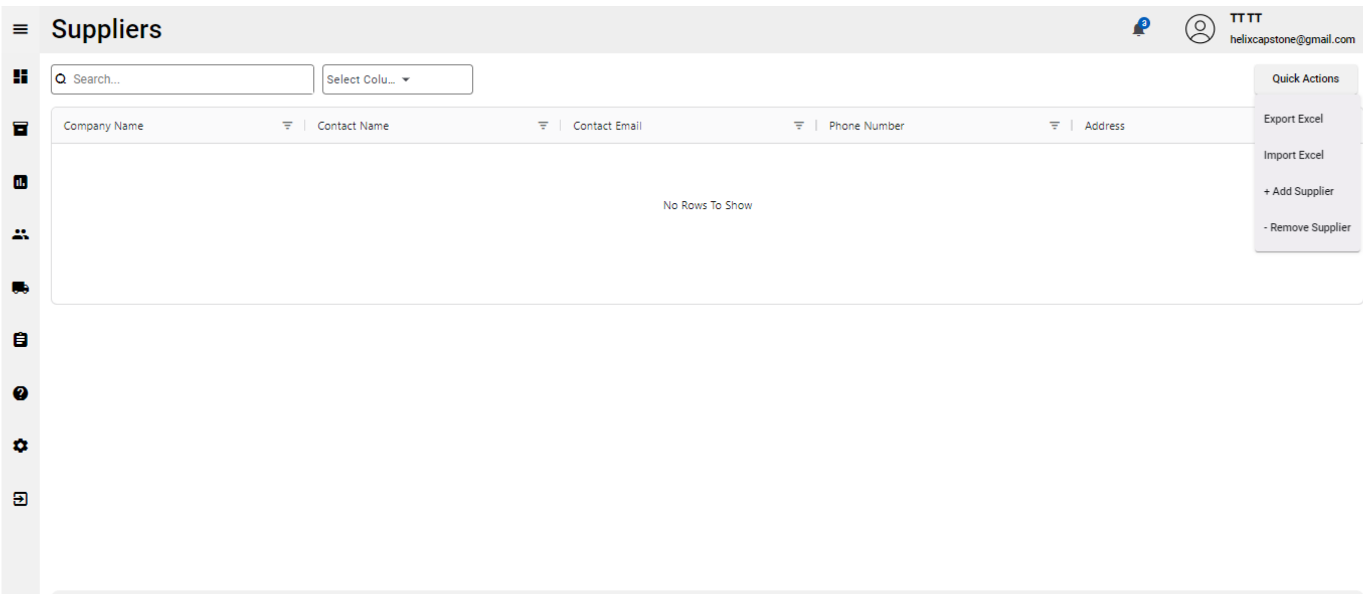
12.5 Navigate Back

To navigate back to the reports page:

1. Scroll to the top of the page.
2. Find the button that says "Back to Reports" at the top of the page.
3. Click the button to be navigated back to the reports page.

1. To navigate back to reports. The user should scroll to the top of the page.
2. At the top you will find a button that says back to reports click it.
3. Then you will be navigated back to reports page.

13 Suppliers



13.1 About

The Supplier Management page is a crucial component of the Smart Inventory system, designed to streamline your interactions with vendors and optimize your supply chain. This intuitive interface allows you to efficiently manage supplier information, track performance, and maintain vital business relationships. From adding new suppliers to reviewing historical data, the Supplier Management page provides a comprehensive set of tools at your fingertips.

13.2 Navigating to Suppliers

1. From all pages there is a sidebar on the leftmost pane.
2. To expand the sidebar a user can hover their cursor over or click the top most icon to expand it.
3. Once expanded the user will be able to read the page titles.
4. Click the icon above Suppliers to navigate to the suppliers page.
5. It is not necessary to expand to click on the icon you can just click on the icon.

13.3 Quick Actions

The "Quick Actions" button is located in the top right corner. Most of the functionality for all pages can be found here.

13.4 Add Supplier

1. If the user wants to add a supplier to the suppliers they should firstly locate the Quick Actions button.
2. Once located click on the button. Then a drop down will appear below the button.
3. Then they should select the "Add Supplier" option in the drop-down.
4. This will open a pop up for the user to add details regarding the supplier they would like to add.
5. Once filled in the user can add the Supplier by clicking the submit button.
6. User can also cancel the add by clicking Cancel button in the form.

13.5 Remove Supplier

1. If the user wants to remove a Supplier from the suppliers they should firstly click on the supplier they would like to remove. Once the row is highlighted in blue.
2. Then the user should locate the Quick Actions button.
3. Once located click on the button. Then a drop down will appear below the button.
4. Then they should select the "Remove Supplier" option in the drop-down.
5. This will open a pop up for the user to confirm the deletion.
6. The user can remove the Supplier by clicking the yes button.
7. User can also cancel the remove by clicking Cancel button in the form.

13.6 Edit Supplier

1. To edit a user must simply double click on the cell that they would like to adjust.
2. This will highlight the cells contents in blue allowing them to change the contents.
3. Once a user is satisfied the user should press enter to update the value.

13.7 Sort and Filter

1. To sort a column all a user has to do is click on the column heading of the column they want to sort according to.
2. The arrow will be visible so a user can be aware of if its ascending or descending order.
3. To filter the user must press on the filter icon that will be visible when hovering over the column heading and filter according to their choice.

13.8 Search and Select

1. The search and select options can be found in the top left side of the page above the table.
2. A user can search for and supplier by firstly selecting a column they would like to search.
3. Once they have selected the column from the drop-down they must enter what they would like to search for in the search bar.
4. As the user types it will adapt the table to contain the matching results.

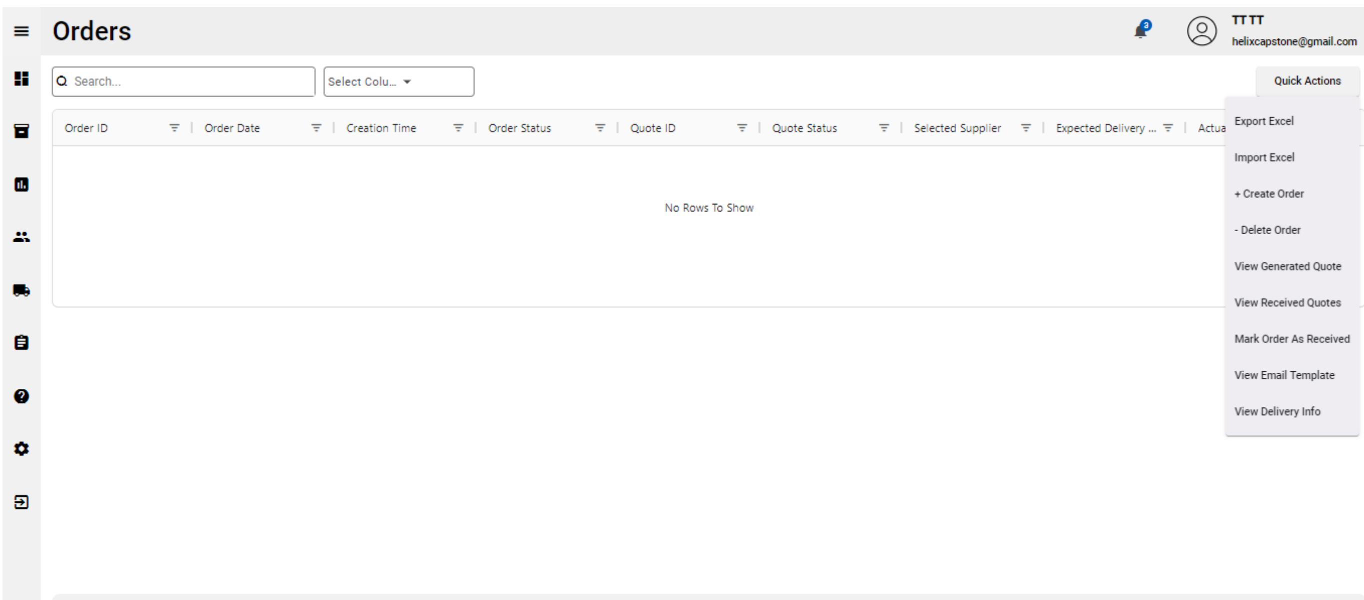
13.9 Export Table

1. To export to excel the user should click on quick actions to see the drop down.
2. Then they should select the "Export to excel" option.
3. This will automatically download the file to their downloads on their device.

13.10 Import Table

1. To import to excel the user should click on quick actions to see the drop down.
2. Then they should select the "Import to excel" option.
3. This will open a pop up for the user to select a file to import into the table.

14 Orders



14.1 About

The Orders page is the central hub for managing all purchasing activities within the Smart Inventory system. This comprehensive interface provides a clear overview of your current orders, pending approvals, and order history. Designed with efficiency in mind, the Orders page allows you to create, track, and modify purchase orders with just a few clicks.

14.2 Navigating to Orders

1. From all pages there is a sidebar on the leftmost pane.
2. To expand the sidebar a user can hover their cursor over or click the top most icon to expand it.
3. Once expanded the user will be able to read the page titles.
4. Click the icon above Orders to navigate to the orders page.
5. It is not necessary to expand to click on the icon you can just click on the icon.

14.3 Quick Actions

The ”Quick Actions” button is located in the top right corner. Most of the functionality for all pages can be found here.

14.4 Create Order

1. If the user wants to create an order quote for a specific supplier they should firstly locate the Quick Actions button.
2. Once located click on the button. Then a drop down will appear below the button.
3. Then they should select the ”Create Order” option in the drop-down.
4. This will open a pop up for the user to add details regarding the supplier they would like to send the quote to and the products they would like to order.
5. Once filled in the user can create the order by clicking the submit button.
6. User can also cancel the create by clicking Cancel button in the form.
7. Once submitted a web portal will be generated an the link sent to the supplier for the supplier to change details, accept or deny products and add the pricing and delivery dates.

14.5 Cancel Order

1. If the user wants to cancel an order to a Supplier from the orders page they should firstly click on the order they would like to cancel. Once the row is highlighted in blue.
2. Then the user should locate the Quick Actions button.
3. Once located click on the button. Then a drop down will appear below the button.
4. Then they should select the Cancel Order” option in the drop-down.
5. This will open a pop up for the user to confirm the cancellation.
6. The user can cancel the order by clicking the yes button.
7. User can also cancel the cancellation by clicking Cancel button in the form.
8. Cancelling an order will send email to the supplier notifying them and changing the table accordingly.

14.6 Mark as delivered

1. If the user wants to mark an order as being delivered from the orders page they should firstly click on the order they would like to cancel. Once the row is highlighted in blue.
2. Then the user should locate the Quick Actions button.
3. Once located click on the button. Then a drop down will appear below the button.
4. Then they should select the ”Mark as delivered” option in the drop-down.
5. This will open a pop up for the user to confirm delivery.
6. The user can cancel by clicking the yes button.
7. User can also cancel by clicking Cancel button in the form.
8. Marking an order as delivered will add the date delivered changing the supplier metrics.

14.7 View Quotes

1. If the user wants to view a full order quote as being delivered from the orders page they should firstly click on the order they would like to view. Once the row is highlighted in blue.
2. Then the user should locate the Quick Actions button.
3. Once located click on the button. Then a drop down will appear below the button.
4. Then they should select the "View Quote" option in the drop-down.
5. This will open a pop up showing the full quotes details.

14.8 Change template

1. If the user wants to change the email template for supplier communication for a specific supplier they should firstly locate the Quick Actions button.
2. Once located click on the button. Then a drop down will appear below the button.
3. Then they should select the "View Template" option in the drop-down.
4. This will open a pop up for current template. The user can change the inputs.
5. The user can now save or cancel the changes.

14.9 Sort and Filter

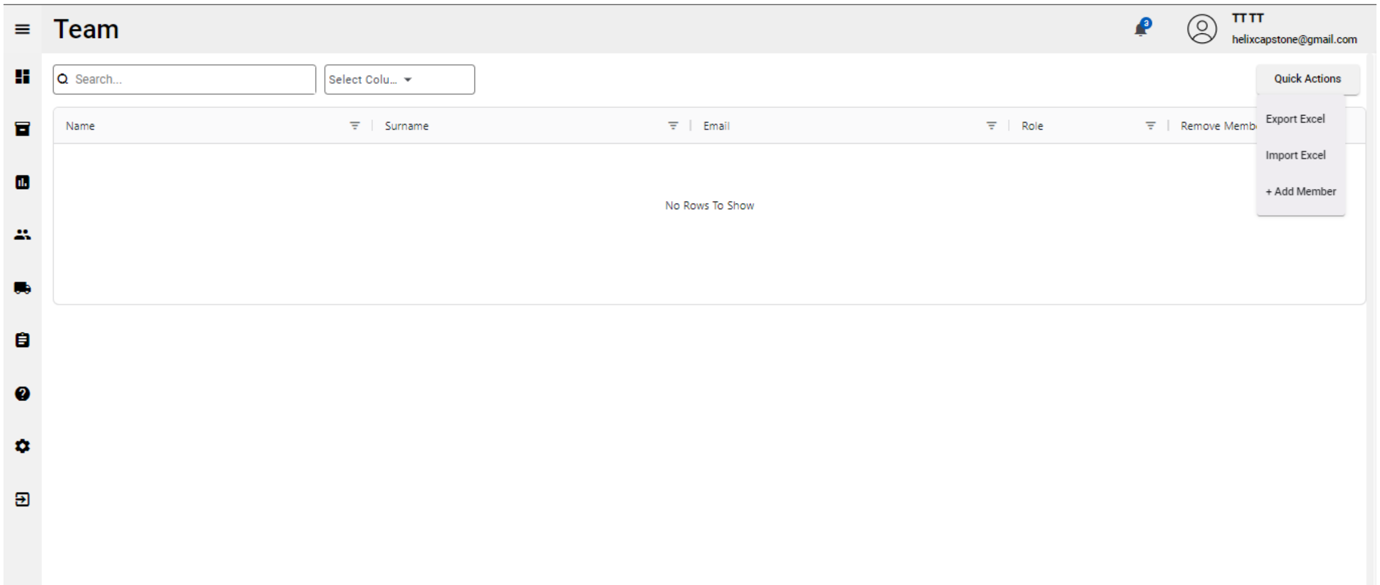
1. To sort a column all a user has to do is click on the column heading of the column they want to sort according to.
2. The arrow will be visible so a user can be aware of if its ascending or descending order.
3. To filter the user must press on the filter icon that will be visible when hovering over the column heading and filter according to their choice.

14.10 Search and Select

1. The search and select options can be found in the top left side of the page above the table.
2. A user can search for and order by firstly selecting a column they would like to search.
3. Once they have selected the column from the drop-down they must enter what they would like to search for in the search bar.
4. As the user types it will adapt the table to contain the matching results.

14.11 Export

1. To export to excel the user should click on quick actions to see the drop down.
2. Then they should select the "Export to excel" option.
3. This will automatically download the file to their downloads on their device.



15 Supplier Order Form

16 Teams

16.1 About

The Teams page is your central command center for managing the personnel involved in your inventory operations. This user-friendly interface allows you to efficiently organize, monitor, and optimize your workforce within the Smart Inventory system. From assigning roles to tracking performance, the Teams page provides a comprehensive set of tools for effective team management.

16.2 Navigating to Teams

1. From all pages there is a sidebar on the leftmost pane.
2. To expand the sidebar a user can hover their cursor over or click the top most icon to expand it.
3. Once expanded the user will be able to read the page titles.
4. Click the icon above Team to navigate to the teams page.
5. It is not necessary to expand to click on the icon you can just click on the icon.

16.3 Quick Actions

The "Quick Actions" button is located in the top right corner. Most of the functionality for all pages can be found here.

16.4 Add Member

1. If the user wants to add a member to the team they should firstly locate the Quick Actions button.
2. Once located click on the button. Then a drop down will appear below the button.
3. Then they should select the "Add Member" option in the drop-down.
4. This will open a pop up for the user to add details regarding the member they would like to add.

5. Once filled in the user can add the member by clicking the submit button.
6. User can also cancel the add by clicking Cancel button in the form.
7. Once a member is added a email is sent to that member to log in.

16.5 Remove Member

1. If the user wants to remove an member from the team they should firstly find the member they would like to remove.
2. The user should then go to the end of the row in the last column there is a delete button.
3. Once located click on the button.
4. This will open a pop up for the user to confirm the deletion.
5. The user can remove the member by clicking the yes button.
6. User can also cancel the remove by clicking Cancel button in the form.

16.6 Edit Member

1. To edit a user must simply double click on the cell that they would like to adjust.
2. This will highlight the cells contents in blue allowing them to change the contents.
3. Once a user is satisfied the user should press enter to update the value.

16.7 Sort and Filter

1. To sort a column all a user has to do is click on the column heading of the column they want to sort according to.
2. The arrow will be visible so a user can be aware of if its ascending or descending order.
3. To filter the user must press on the filter icon that will be visible when hovering over the column heading and filter according to their choice.

16.8 Search and Select

1. The search and select options can be found in the top left side of the page above the table.
2. A user can search for and member by firstly selecting a column they would like to search.
3. Once they have selected the column from the drop-down they must enter what they would like to search for in the search bar.
4. As the user types it will adapt the table to contain the matching results.

16.9 Export

1. To export to excel the user should click on quick actions to see the drop down.
2. Then they should select the ”Export to excel” option.
3. This will automatically download the file to their downloads on their device.

17 Profile/Settings

17.1 Navigating to Profile/Settings

1. From all pages there is a sidebar on the leftmost pane.
2. To expand the sidebar a user can hover their cursor over or click the top most icon to expand it.
3. Once expanded the user will be able to read the page titles.
4. Click the icon above Settings to navigate to the settings page.
5. It is not necessary to expand to click on the icon you can just click on the icon.

17.2 Profile

17.2.1 Updating Name and Email

1. Within the Profile tab, locate the fields for 'Name' and 'Email'.
2. Enter the new details into the appropriate fields.

17.2.2 Changing Your Password

1. In the 'Password' section, input your current password.
2. Type your new password and confirm it in the designated fields.
3. Click 'Change Password' to secure your account with the new password.

17.2.3 How to Delete Your Account

1. Scroll to the 'Delete Account' button at the bottom of the Profile tab.
2. Click 'Delete Account' and confirm your decision with the correct details.
3. Please note that this action is irreversible.

17.3 Theme

1. Toggle between 'Light Mode' and 'Dark Mode' to suit your visual preference.
2. The interface will update immediately to reflect your choice.

17.4 Notifications

18 Help

The Help page is an essential resource for users to understand how to utilize the application effectively, troubleshoot issues, and get detailed instructions for specific tasks. Users are encouraged to explore this section to enhance their proficiency with the application.

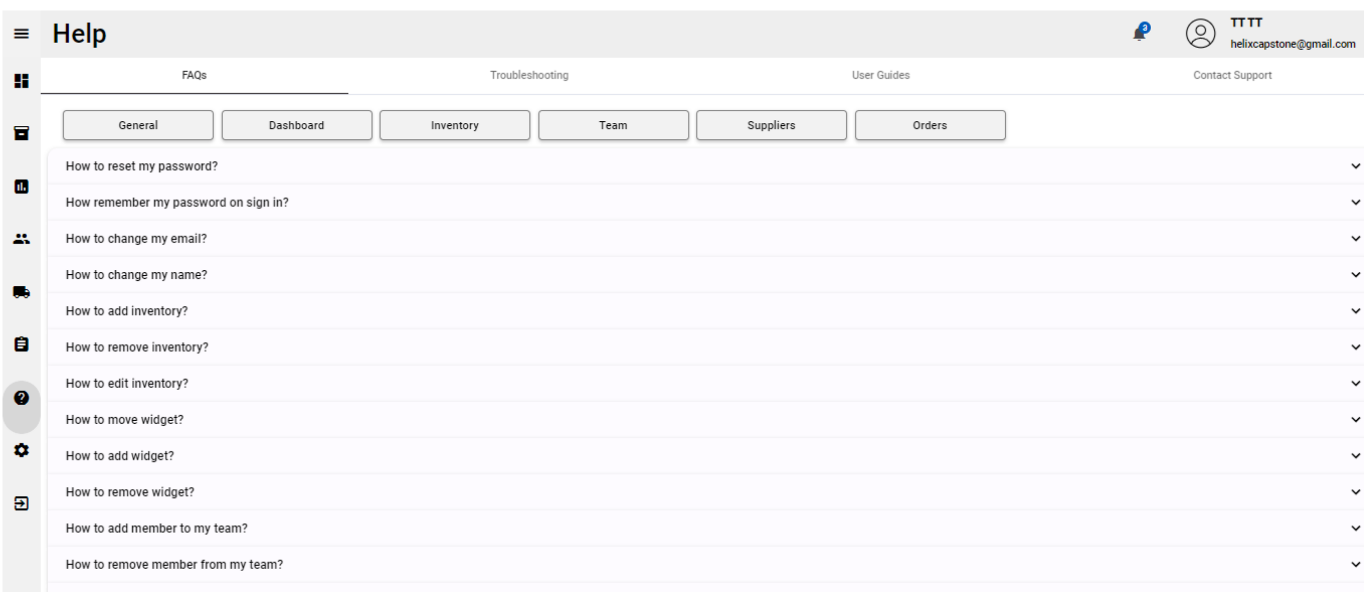
18.1 Help Tabs

- FAQs: This section is divided into tabs corresponding to different aspects of the application, such as General, Dashboard, Inventory, Team, Suppliers, and Orders. Each tab contains a list of common questions related to that category.
- Troubleshooting: Users can find solutions to common issues and troubleshooting tips to resolve common problems quickly.
- User Guides: Detailed guides are available to assist users in navigating through the application's features and functionalities.
- Contact Support: This is where you can send emails to us if you need help with a problem you do not know how to solve.

18.2 Navigating to Help

1. From all pages there is a sidebar on the leftmost pane.
2. To expand the sidebar a user can hover their cursor over or click the top most icon to expand it.
3. Once expanded the user will be able to read the page titles.
4. Click the icon above Help to navigate to the help page.
5. It is not necessary to expand to click on the icon you can just click on the icon.

18.3 FAQs



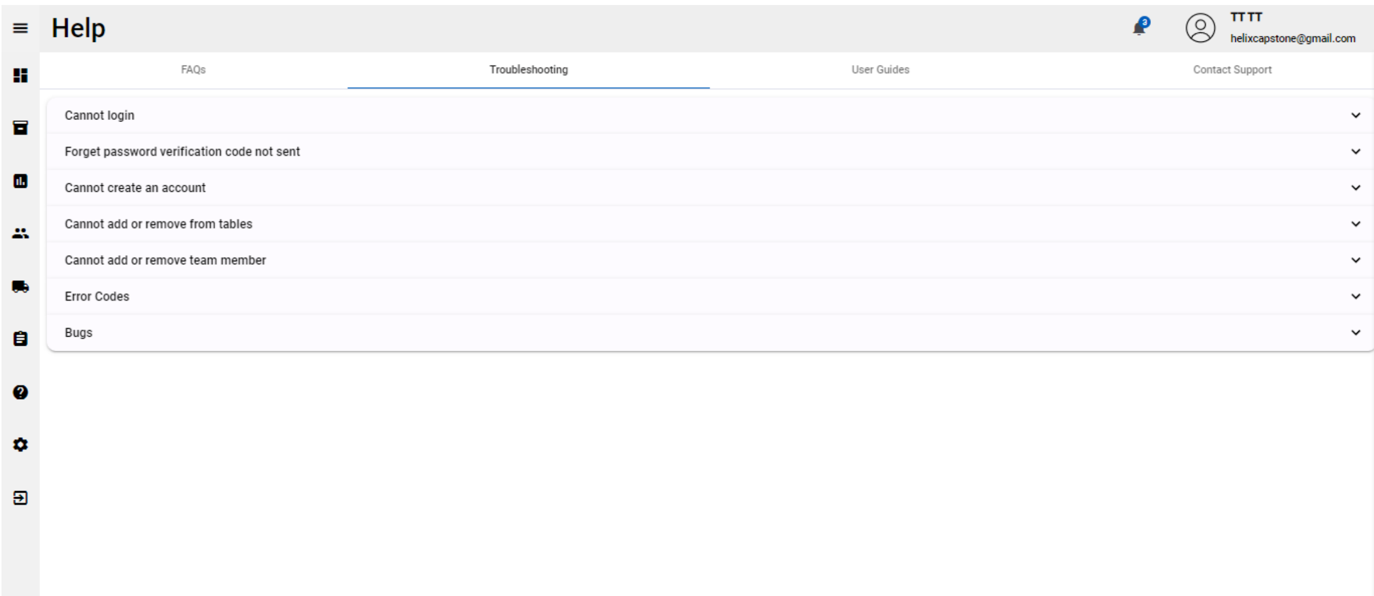
18.3.1 Process to read answers to questions

- To use FAQs it is relatively simple if you have a question. Look for one similar or that interests you.
- Then you should just click on the question and the answer will drop down below it.

18.3.2 Filtering

1. If you are struggling to find the question you are looking for but know what page it is relating to click on one of the buttons located at the top of the page.
2. The button you click should filter all FAQs according to the page you selected.

18.4 Troubleshooting



- To use Troubleshooting it is relatively simple if you have a issue that you do not know how to solve. Look for the problem similar or that interests you in the page.
- Then you should just click on the troubleshooting option and the answer will drop down below it.

18.5 User Guides

18.5.1 Key areas covered

Introduction

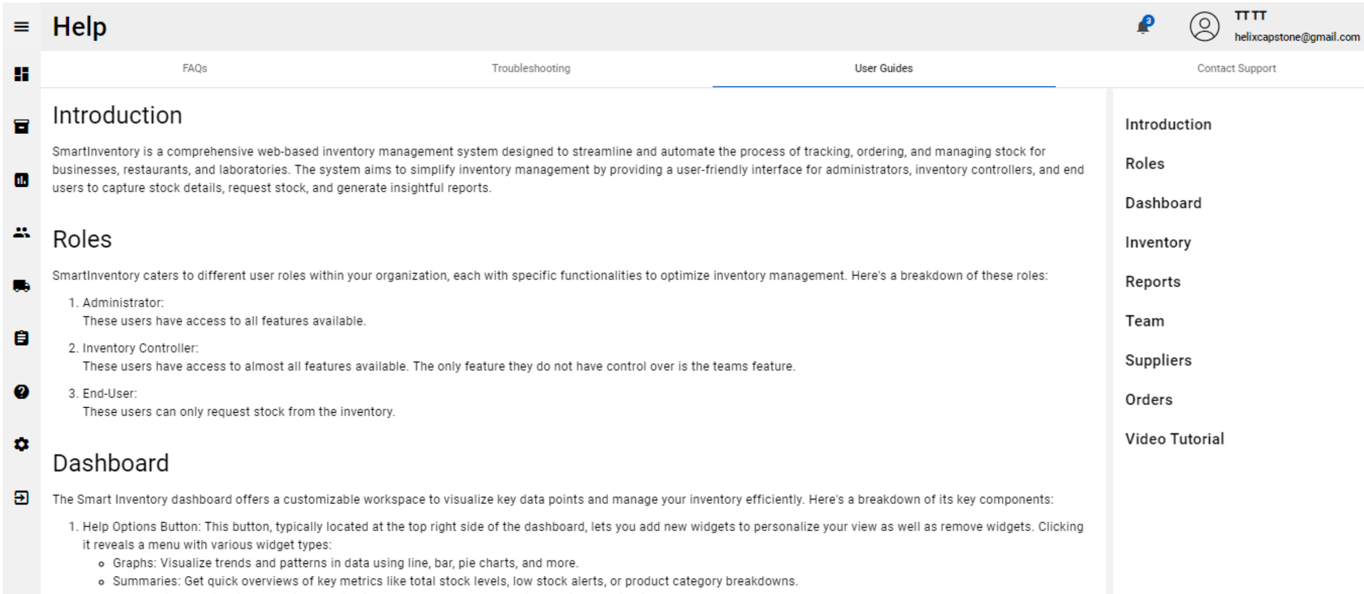
- Overview of Smart Inventory capabilities and design philosophy.

Roles

- Detailed descriptions of different user roles and their permissions.
- Dashboard
- Instructions on how to customize and manage the dashboard widgets.
- Inventory
- Guidelines on how to manage inventory, including adding, editing, and removing items.

Reports

- How to generate various types of reports.



Team

- Managing team members including adding, removing, and editing team profiles.
- Suppliers
- Steps for managing supplier information.

Orders

- Instructions on how to process orders, including modifications and cancellations.

Video Tutorial

- Links to video tutorials that provide visual guidance on using the system.

18.6 Contact Support

- Access the contact form to submit any queries directly to support.
- Fill out your name, email address, and a detailed message describing your issue or question.
- Click 'Send' to submit your request. Support staff will respond to your inquiries as quickly as possible.

19 Conclusion

This document provides an overview of the various reports available in the Smart Inventory system. Each report offers specific metrics, graphs, and tables to help users analyze and understand different aspects of the inventory, suppliers, and team activities. For the most up-to-date information and detailed instructions on using each report, please refer to the user manual or contact the support team.