HELIX

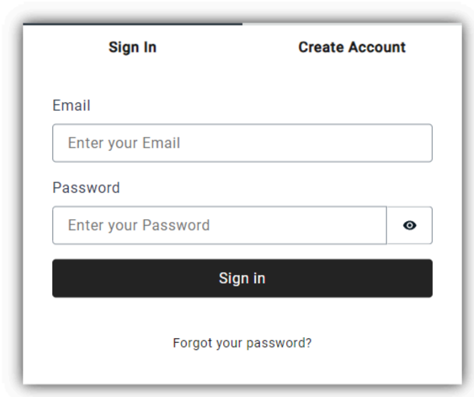
User Manual

24.09.2024

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 to simplify the process.

Sign In



Navigate to Sign In

Through the link:

1. The link will be received from the team admin when they have created an 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.

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 in, 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.

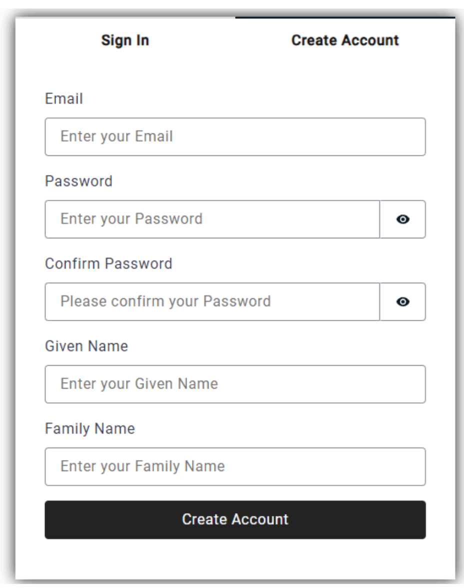
Forgot Password Process

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 a part of to make 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.

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.

Create Account



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.

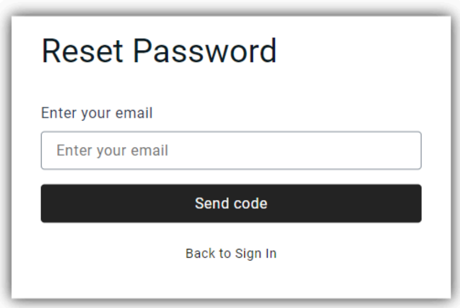
Create Account Process

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 the 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.

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.

Forgot Password



Forgot Password Process

1. A user will be brought to this page either through "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.

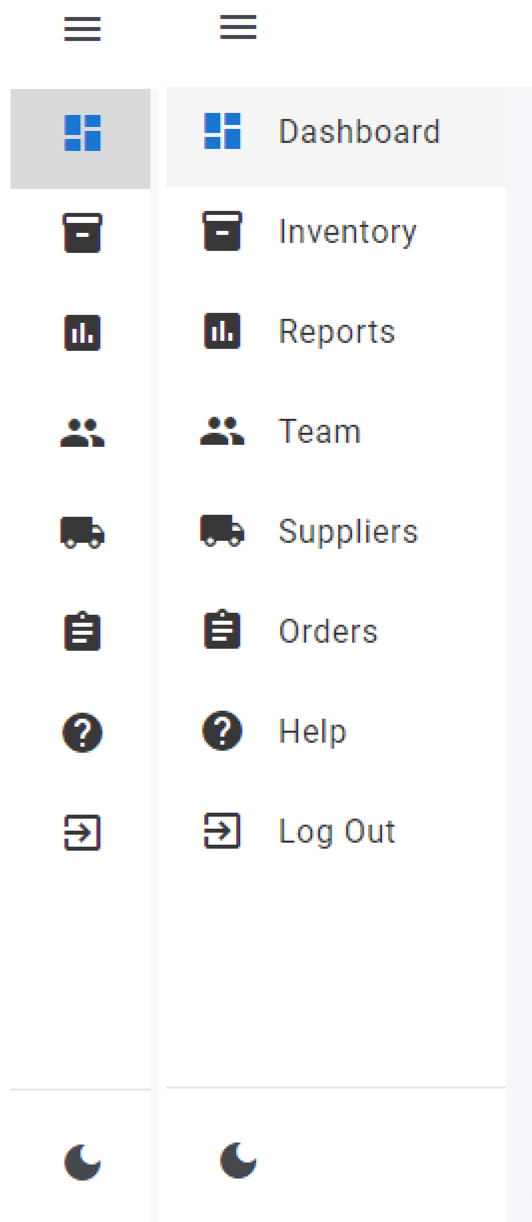
Navigate Back to Sign In page

Users should click on the "Back to sign in" link redirecting them to sign in.

Page Similarities

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 and the gear icon where you can access settings.



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:

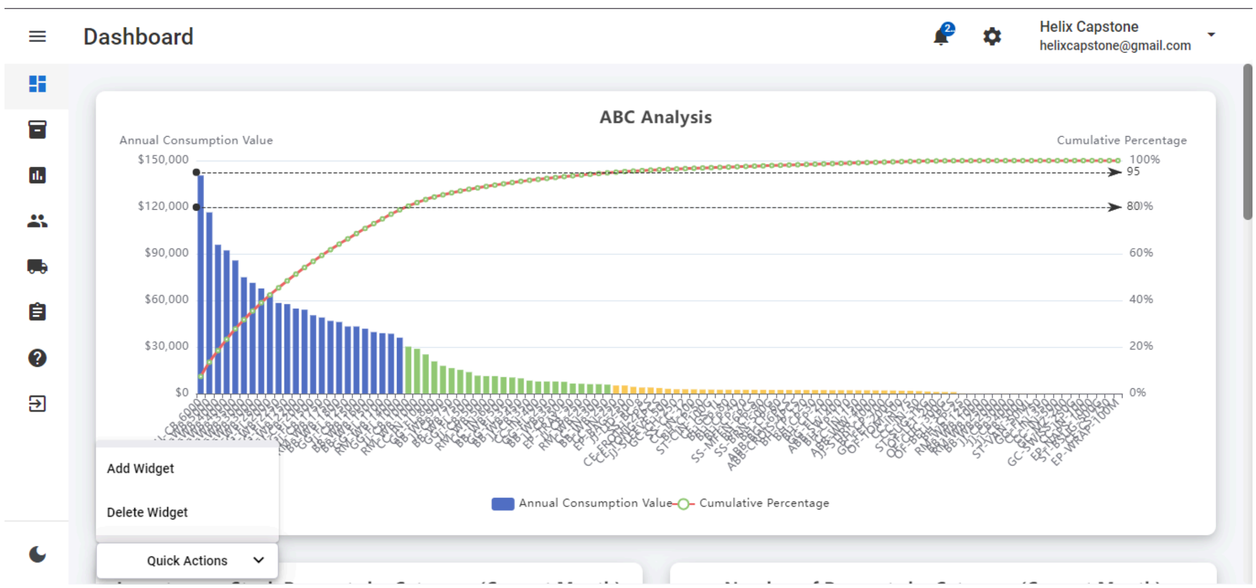
- Dashboard: The home icon represents the dashboard. Overview of activities and customization of what activities you would like to keep track of in the same place.
- Inventory: The table icon is used to represent the inventory tab. This is the inventory that the business possesses. Here inventory can 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 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.
- Help: For basic help with the app.
- Log Out: The bottom most button is the logout button so that a user can log out of their account for security purposes.
- 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.

Open Sidebar

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

Dashboard



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.

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.

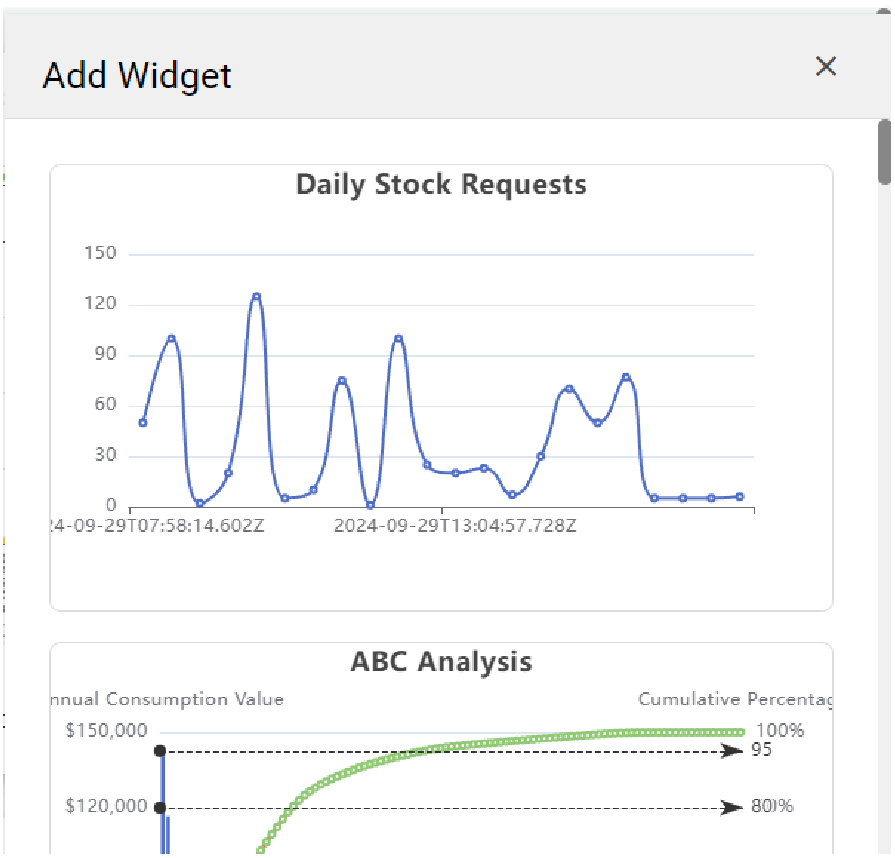
4. Click the icon above Dashboard to navigate to the dashboard page.
5. It is not necessary to expand to click on the icon, you can just click on the icon.

Chart options

You have a wide variety of already created charts according to what people in the supply chain industry tend to want to see.

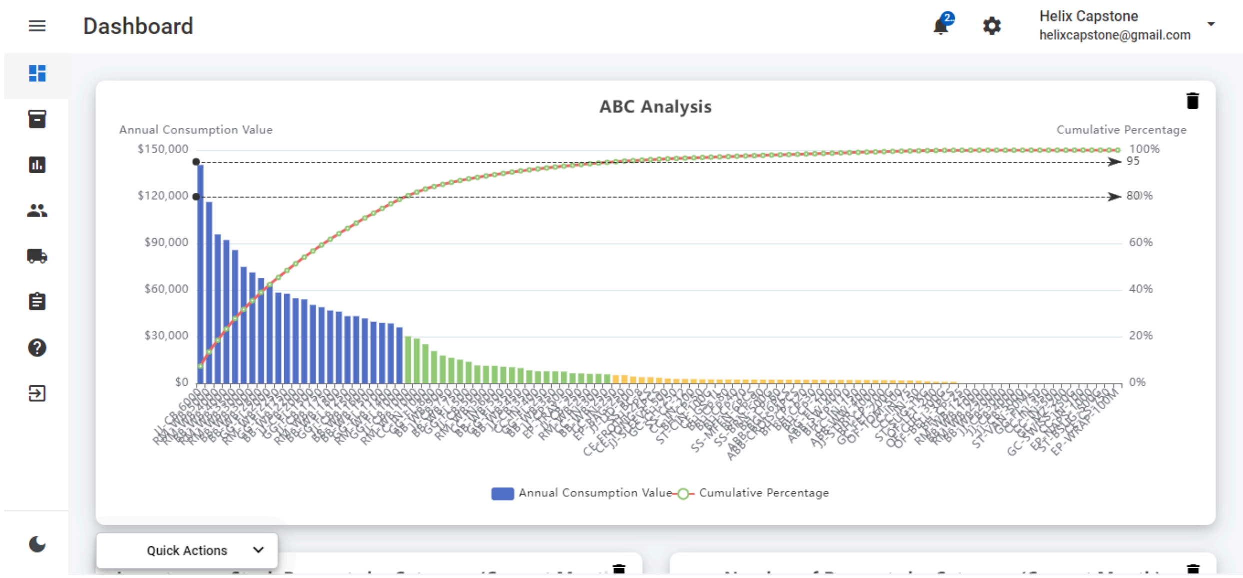
Quick Actions

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



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.

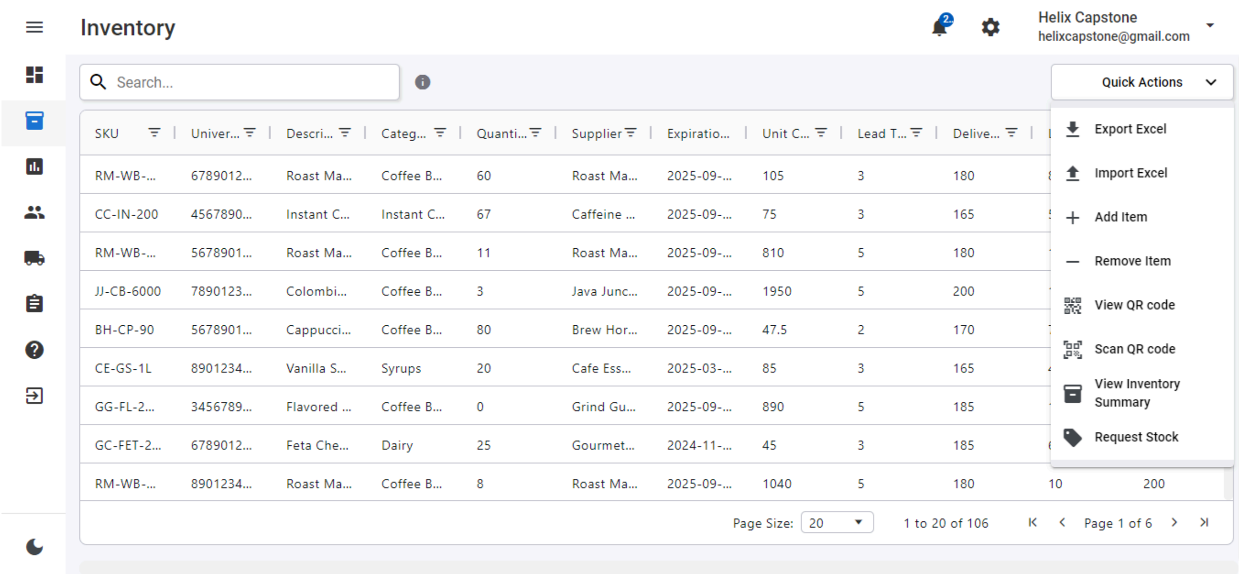


Remove Widget

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:

1. Firstly locate the quick Actions button. Then click on it.
2. Select the "Delete a Widget" option from the Help Options menu. This will trigger an icon to appear on all the widgets.
3. Each widget in the deletion interface will have a small trash can icon next to it.
4. 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.
5. After selecting the widgets you want to delete, you have two options:
    a. Confirm Deletions: Click the "Confirm Deletions" button to permanently remove the marked widgets from your dashboard.
        i. Upon confirming the deletions, the widgets will be removed, and a user will be taken back to the dashboard
    b. 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.
        i. If you choose to undo the deletion, the widgets will remain on your dashboard as before, and no changes will be made.

Inventory



Navigating to Inventory

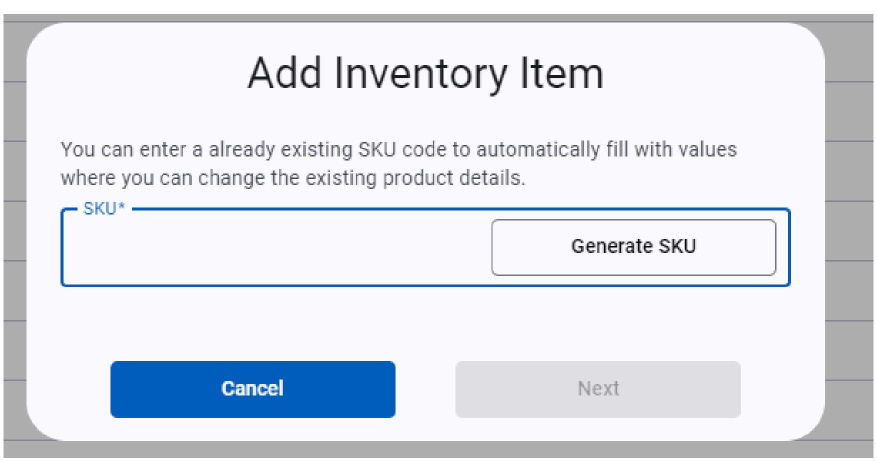
1. From all pages there is a sidebar on the leftmost pane.
2. To expand the sidebar a user can hover their cursor over or click the top most icon to expand it.
3. Once expanded the user will be able to read the page titles.
4. Click the icon above Inventory to navigate to the inventory page.
5. It is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

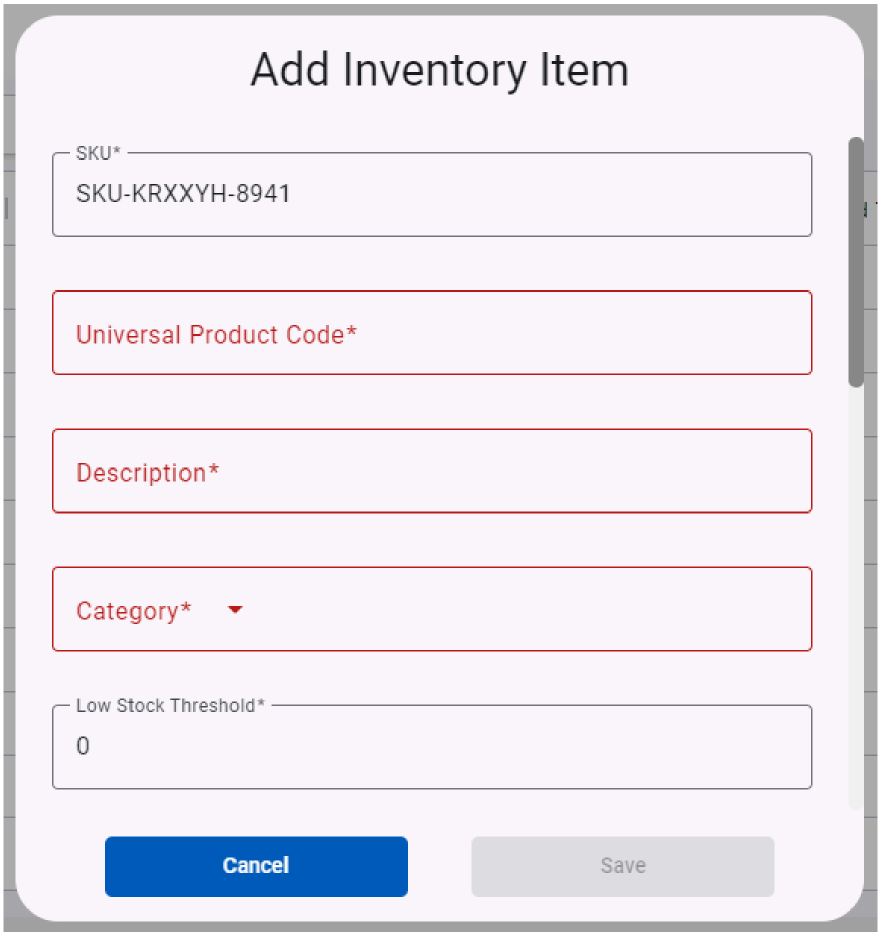
About

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

Quick Actions

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





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. Users can also cancel the addition by clicking the Cancel button in the form.

There are three ways of generating a SKU code:

1. Your own choice input your own code
2. You can generate a random SKU by clicking on the generate SKU button
3. You can also input an already existing SKU to have inputs already filled in and change specific parts of the item.

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. Users can also cancel the removal by clicking the Cancel button in the form.

Remove Multiple Items

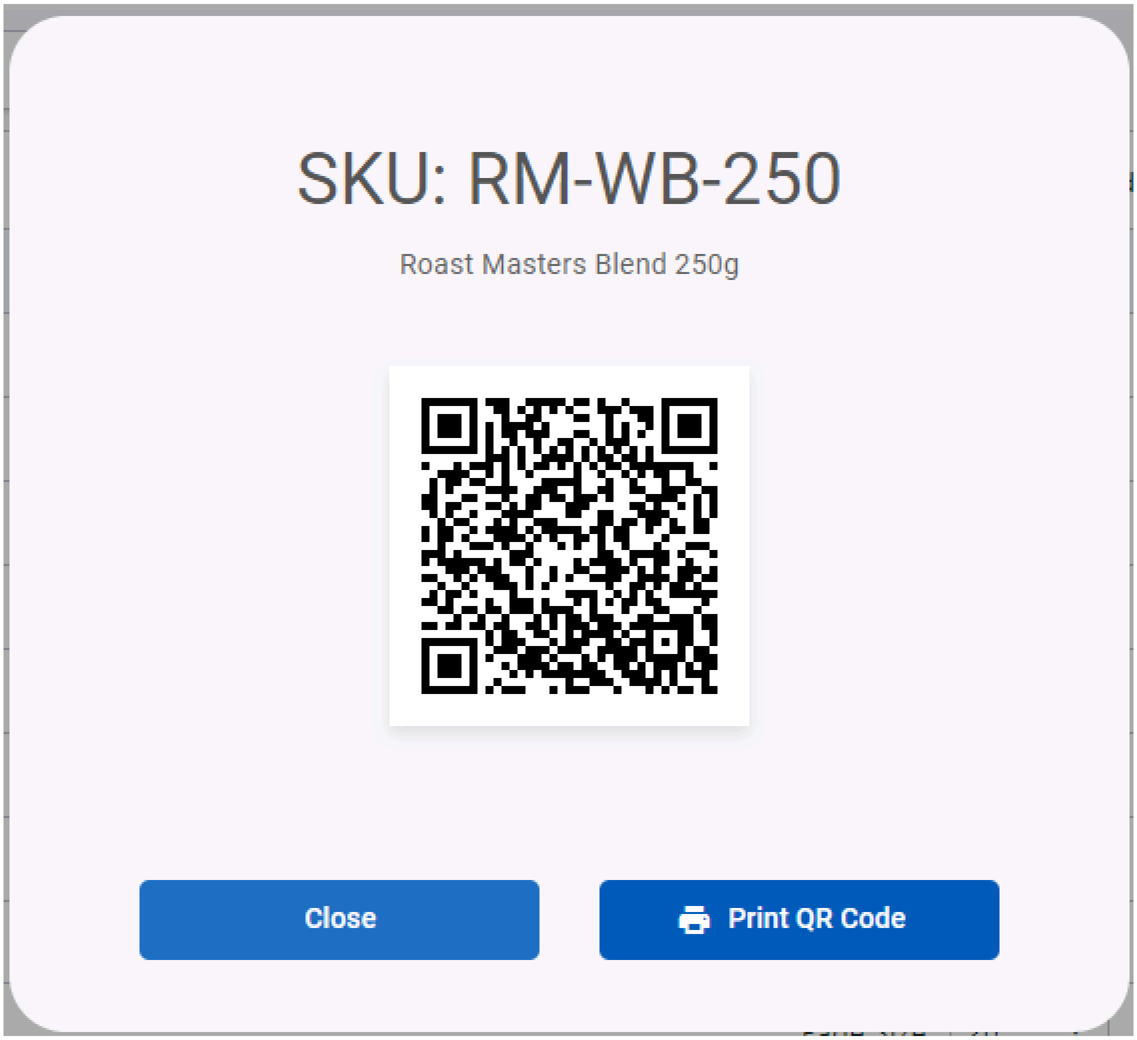
1. If the user wants to remove an item to the inventory they should firstly hold in the "CTRL" key on their keyboard and click on the items they would like to remove.
2. Once the rows are highlighted in blue and all the rows are selected, the user can release the "CTRL" key.
3. Then the user should locate 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. Users can also cancel the removal by clicking the Cancel button in the form.

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.

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. Users can also cancel the request by clicking the Cancel button in the form.



QR code generation

1. To generate a QR code firstly click on the item row that you would like a QR code for.
2. Then locate the Quick action button and click on it.
3. A drop down will appear now click on generate QR code.
4. A pop up with the QR will appear.
5. You can choose to print it or press cancel

QR code scanning

1. To scan a QR code locate the quick actions.
2. A drop down will appear once clicked.
3. Now click on the Scan QR code button.
4. A pop up will appear, line the QR code up inside the camera box and it will automatically scan.
5. A request pop up will appear for the item associated with the QR code.
6. Now select the quantity of the product you would like.

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 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.

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.

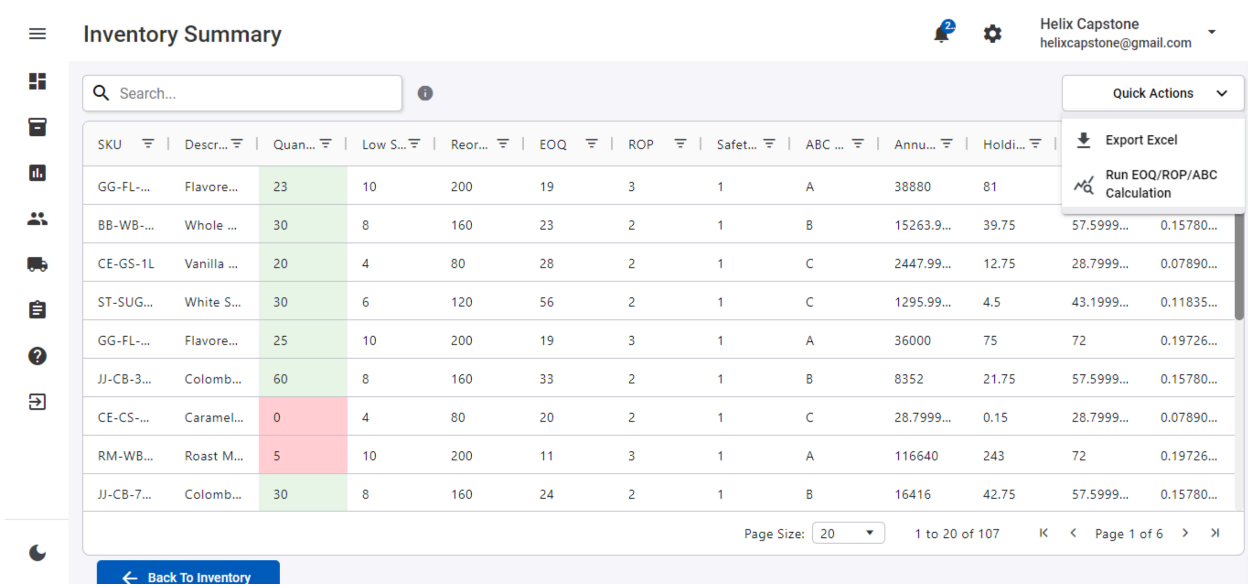
Export

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.

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.

Inventory Summary



About

The Inventory Summary page provides a comprehensive overview of your inventory items, including key metrics and calculations to help optimize your stock management.

Navigating to Inventory Summary

1. From the main Inventory page, look for a button or link labeled "Inventory Summary" or "View Summary".
2. Click this button to navigate to the Inventory Summary page.

Quick Actions

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

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 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.

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.

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.

Column uses

- Low Stock Threshold: Point at which stock is considered low
- Reorder Amount: Quantity to reorder when stock is low
- EOQ: Economic Order Quantity
- ROP: Reorder Point
- Safety Stock: Extra stock to prevent stockouts
- ABC Category: Product classification (A: High importance, B: Medium, C: Low)
- Annual Consumption Value: Total value consumed in a year
- Holding Cost: Cost to hold one unit for a year

- Annual Demand: Total quantity demanded in a year
- Daily Demand: Average quantity demanded per day

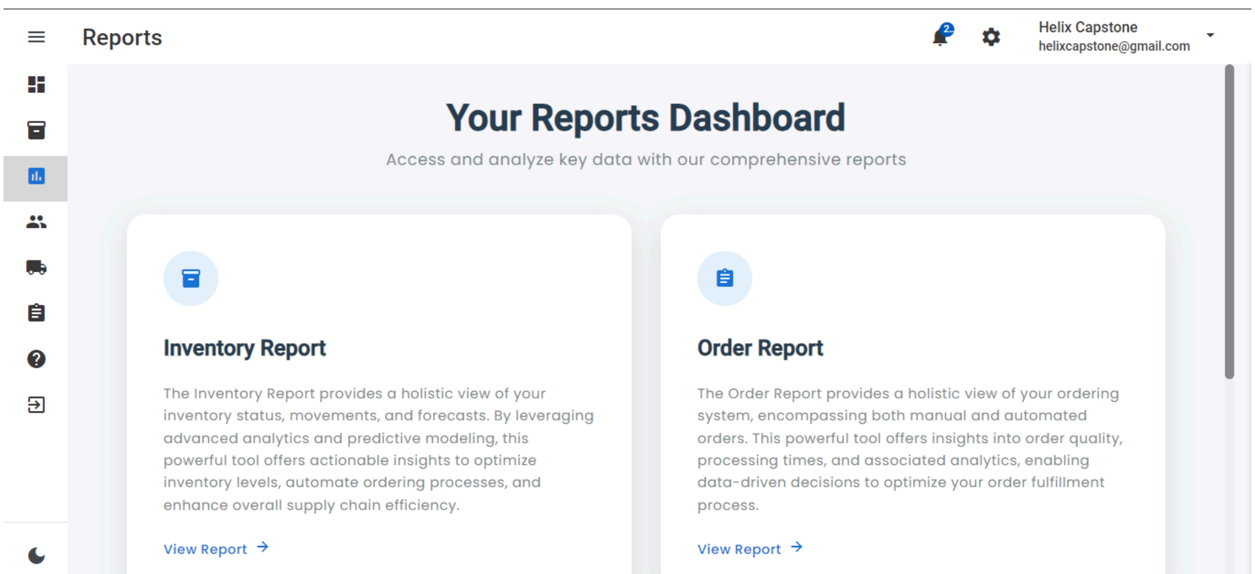
Visual Indicators

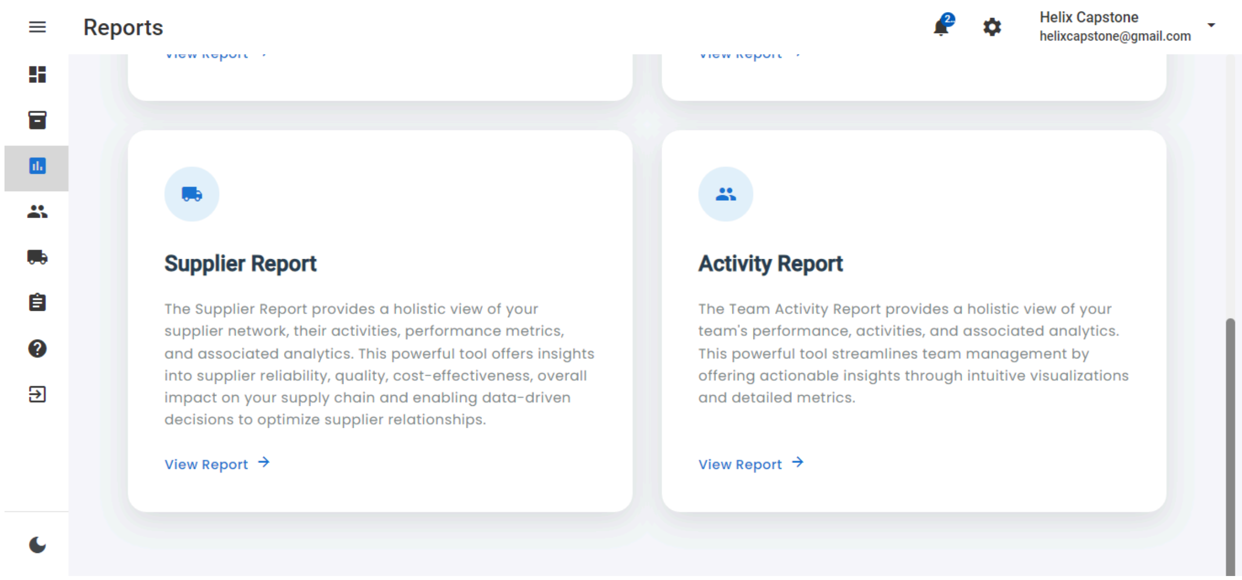
- Items with quantity below the low stock threshold are highlighted in light red.
- Items with normal stock levels are highlighted in light green.

Run EOQ/ROP/ABC Calculations

1. Look for a button labeled "Run EOQ/ROP Calculation" or similar.
2. Click this button to initiate the calculations.
3. Wait for the calculation to complete. A loading indicator will be shown during this process.
4. Once complete, the table will refresh with updated EOQ, ROP, and ABC Category values.

Reports





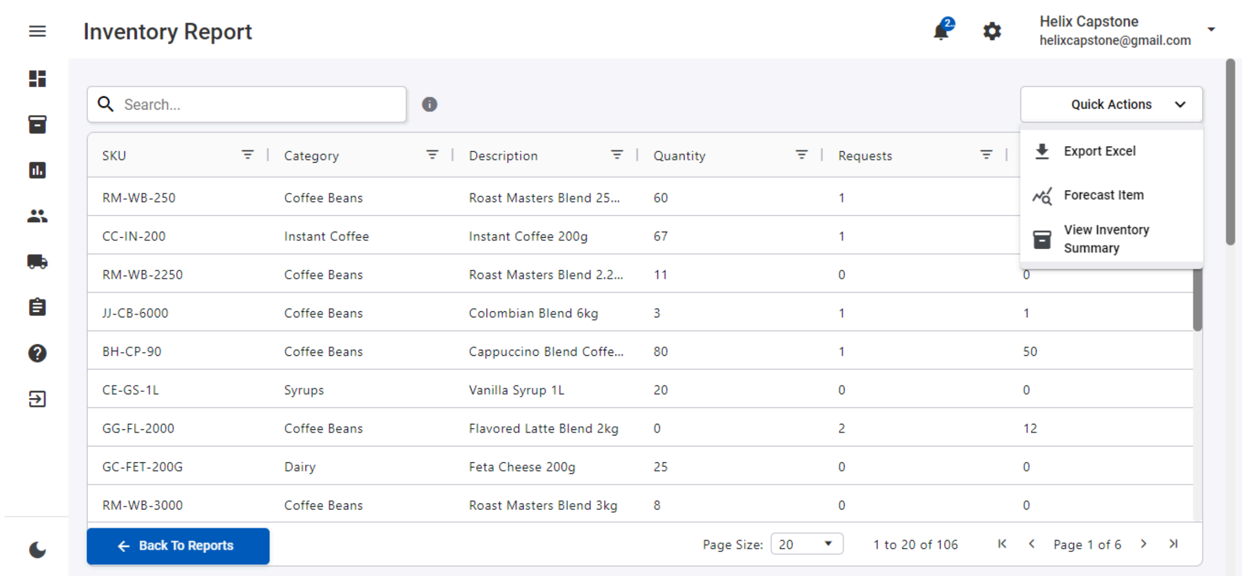
About
The Reports page is the page where basic reporting for orders, inventory, supplier and activity can be found.

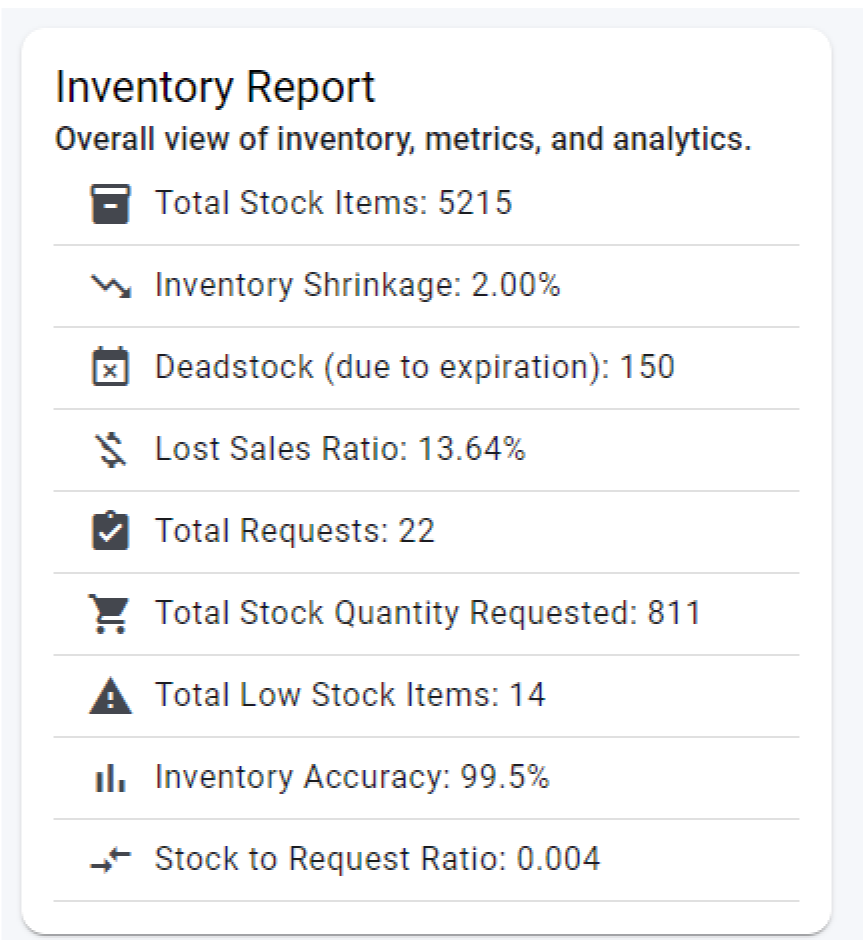
Type of Reports
- Order Report: Contains data and analytics pertaining to orders of the team and automated orders as well.
- Supplier Report: Contains data and analytics pertaining to suppliers of the team.
- Activity Report: Contains data and analytics pertaining to members of the team.
- Inventory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

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.

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.

Inventory Report





Forecasting

The inventory report has the capability of forecasting a specific product. To do this:

1. Firstly select the item row you would like to forecast. The row should turn blue.

2. Now you should locate the quick actions and click it.
3. In the drop down click on the Forecast Item option.
4. A popup will appear with the predicted values graph.
5. You have the option of closing the pop up or printing the graph.

Metrics

The Inventory Report includes the following metrics:

- Total Stock Items: The total number of unique items in inventory.
- Total Requests: The number of stock requests made during the reporting period.
- Total Stock Quantity Requested: The sum of all quantities requested across all stock requests.
- Total Low Stock Items: Number of items below their reorder point or minimum stock level.
- Inventory Accuracy: Percentage of inventory records that match physical counts, indicating data reliability.
- Stock to Request Ratio: Compares available stock to requested quantities, helping identify supply-demand balance.
- Inventory Shrinkage: Percentage of inventory lost due to theft, damage, or errors.
- Dead-stock (due to expiration): Value or quantity of inventory that expired before use.
- Lost Sales Ratio: Estimated sales lost due to stockouts as a percentage of total potential sales.

Export

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

Navigate Back

To navigate back to the reports page:

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

Order Report

Export

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

Navigate Back

To navigate back to the reports page:

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

Supplier Report

Metrics

The Supplier Report includes the following metrics:

- Average supplier performance: Overall score combining various metrics to assess supplier quality.
- Overall product defect rate: Percentage of defective products received from all suppliers.
- Worst performer: Supplier with the lowest performance score or highest defect rate.
- Average delivery rate: Percentage of orders delivered on time across all suppliers.
- Fill Rate: Percentage of orders fulfilled completely as requested.
- Total inventory turnover: How many times inventory is sold and replaced over a period.
- Critical/Major/Minor Defect Rate: Breakdown of defects by severity level.
- "Right First Time" Rate: Percentage of orders delivered correctly without need for rework or returns.
- On-time Order Completion Rate: Percentage of orders completed by the agreed deadline.

Export

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

Navigate Back

To navigate back to the reports page:

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

Activity Report

Export

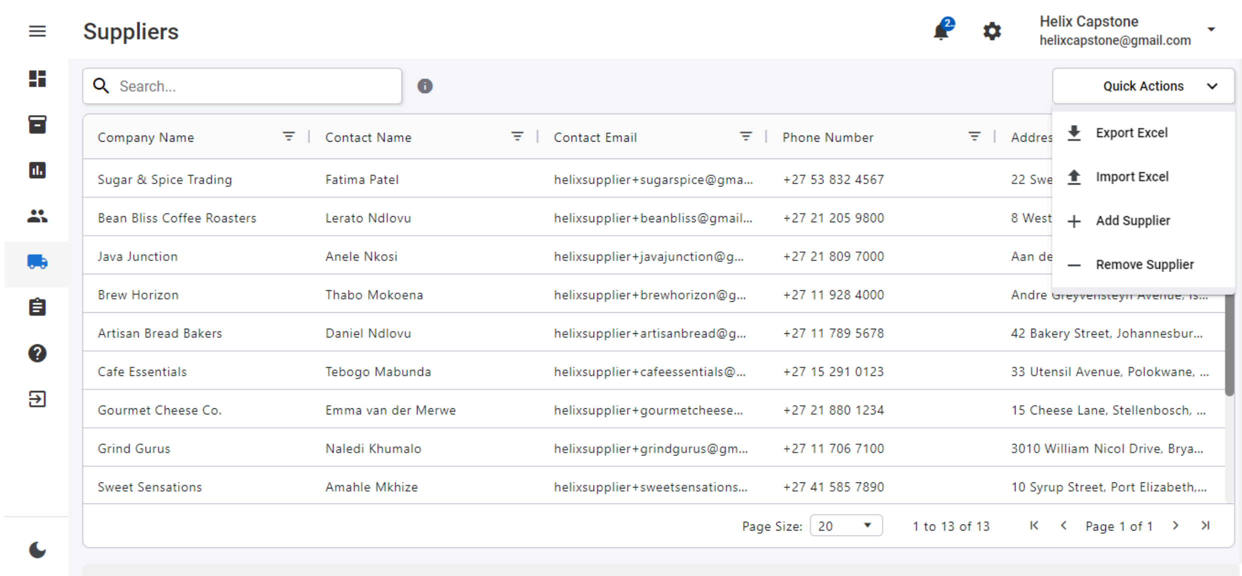
The export functionality for the Activity Report is not explicitly defined in the provided code.

Navigate Back

To navigate back to the reports page:

1. At the bottom you will find a button that says back to reports click it.
2. Then you will be navigated back to the reports page.

Suppliers



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.

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

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. Users can also cancel the addition by clicking the Cancel button in the form.

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. Users can also cancel the removal by clicking the Cancel button in the form.

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.

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 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.

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.

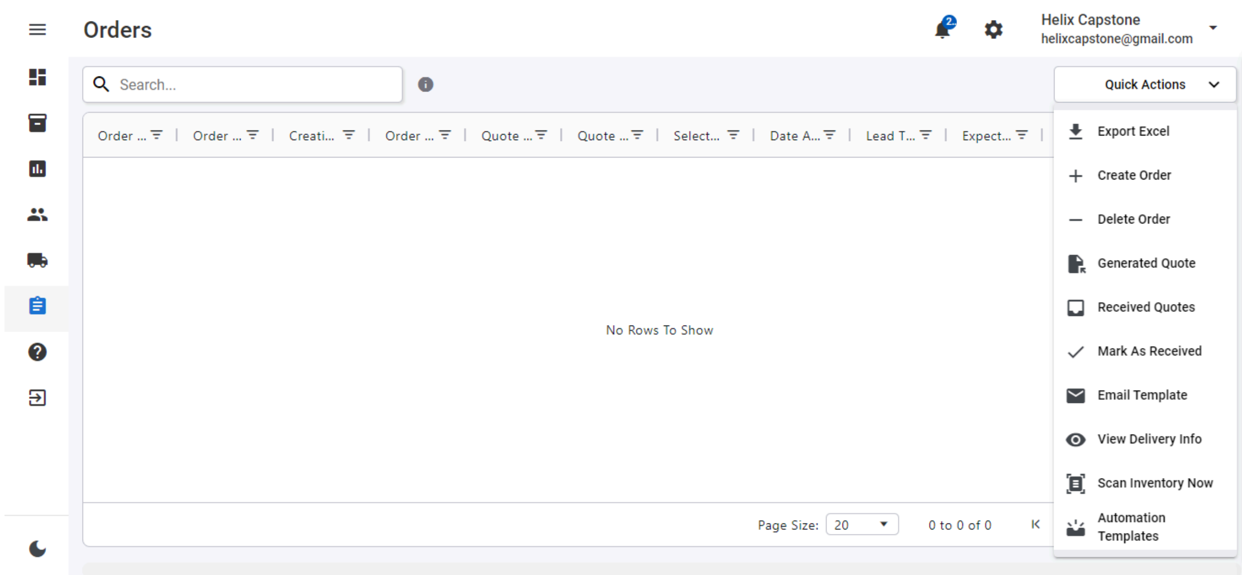
Export Table

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.

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.

Orders



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.

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.

Quick Actions

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

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.

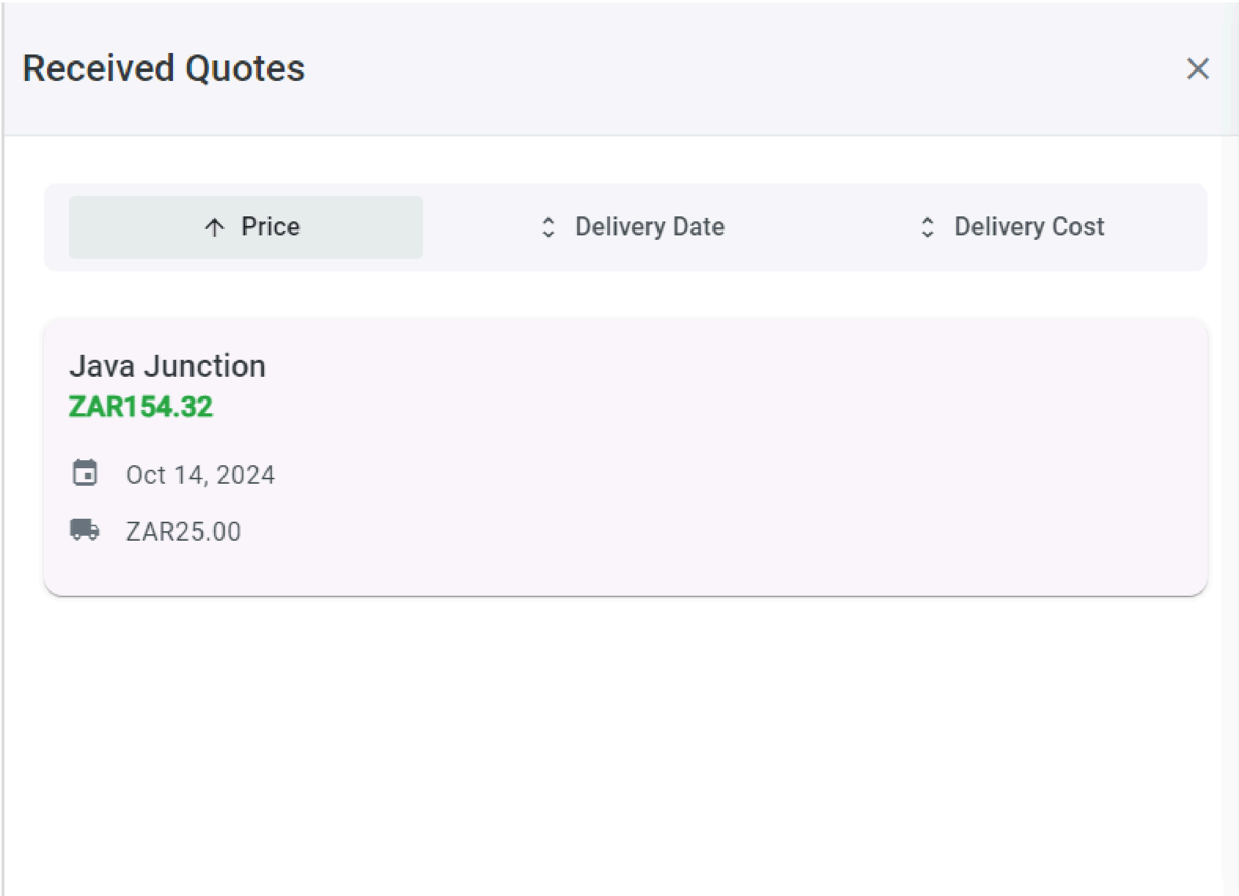
4. This will open a pop up for the user to add details regarding the supplier they would like to send the quote to and the products they would like to order.
5. Once filled in the user can create the order by clicking the submit button.
6. Users can also cancel the creation by clicking the Cancel button in the form.
7. Once submitted a web portal will be generated and the link sent to the supplier for the supplier to change details, accept or deny products and add the pricing and delivery dates.

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. Users can also cancel the cancellation by clicking the Cancel button in the form.
8. Canceling an order will send email to the supplier notifying them and changing the table accordingly.

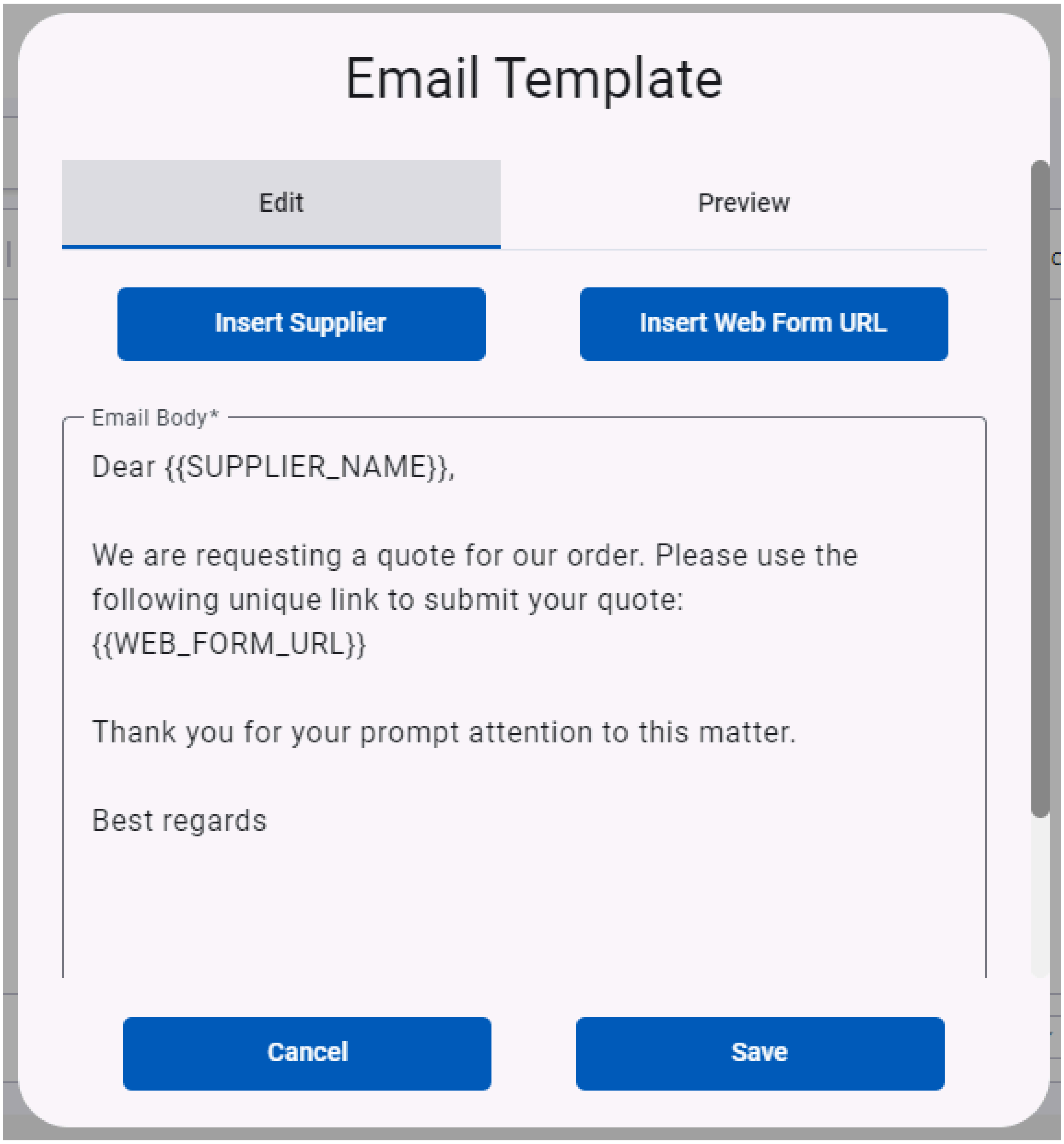
Mark as delivered

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. Users can also cancel by clicking the Cancel button in the form.
8. Marking an order as delivered will add the date delivered changing the supplier metrics.



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 Received Quote" option in the drop-down.
5. This will open a pop up showing the full quotes details.



Email 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 the current template. The user can change the inputs.
5. The user can now save or cancel the changes.

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 its ascending or descending order.

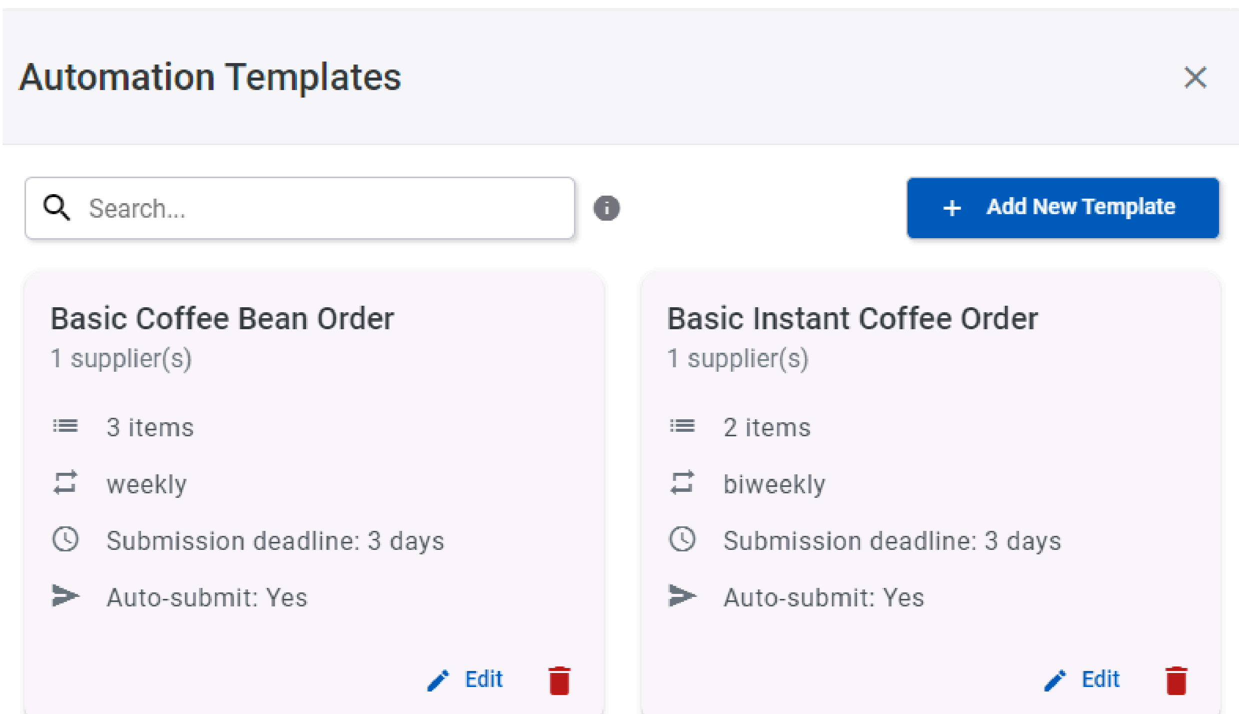
3. To filter the user must press on the filter icon that will be visible when hovering over the column heading and filter according to their choice.

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.

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.

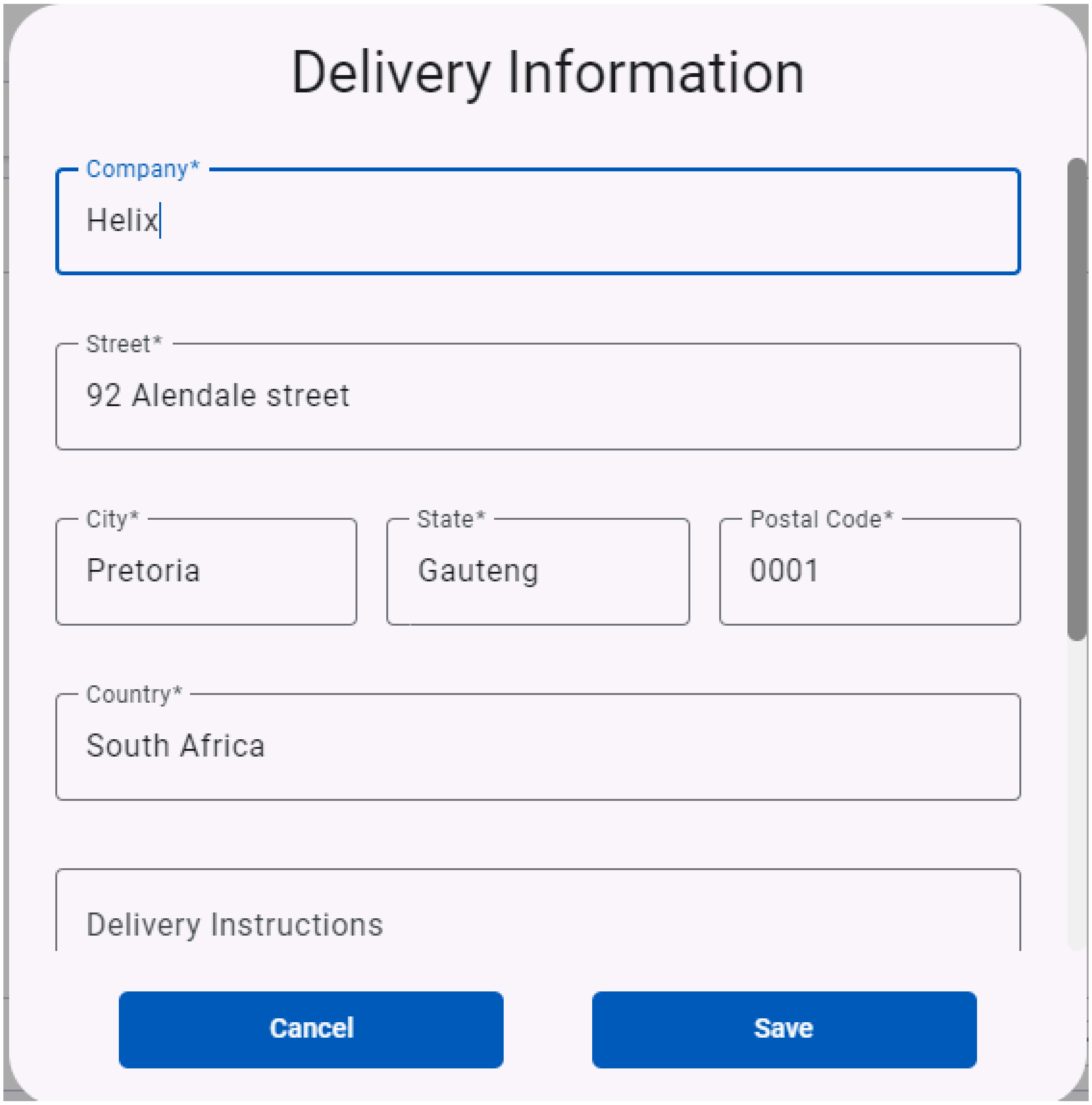


Automation Templates

These are templates where you can specify the items and quantities of those items from specific suppliers you would like and at what interval you would like the quotes to be sent out at.

1. To open the side panel you should locate the Automation Templates button and click it.

2. This will open a side panel for creating, editing and deleting templates.
3. To create a template click on the new template button and fill in the details you would like.
4. To edit the generated template locate the edit button on the generated template card and click it for a pop up for you to make changes.
5. To delete the same process just locate the trash icon and confirm you would like to delete it.

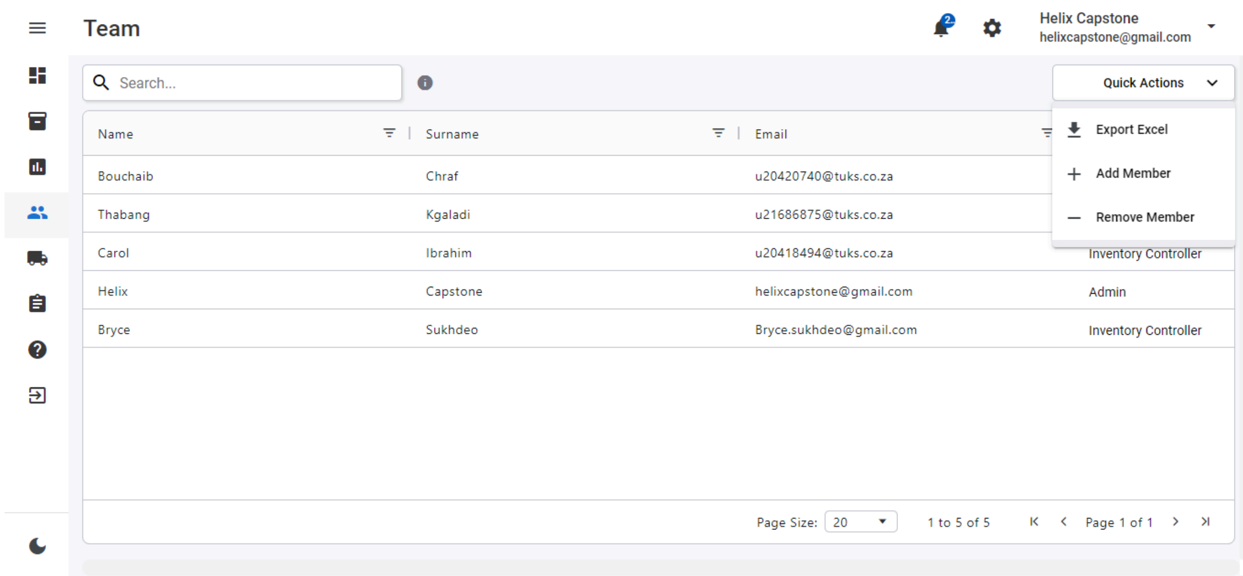


Delivery Information

The suppliers need to know where they are delivering to to initialize this information:

1. Locate the quick actions click it.
2. A drop down will appear and click on the delivery information option.
3. Now fill in the necessary info you can also edit with the same process.

Teams



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.

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.

Quick Actions

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

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. Users can also cancel the addition by clicking the Cancel button in the form.
7. Once a member is added an email is sent to that member to log in.

Remove Member

1. If the user wants to remove a 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. Users can also cancel the removal by clicking the Cancel button in the form.

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.

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 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.

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 a 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.

Export

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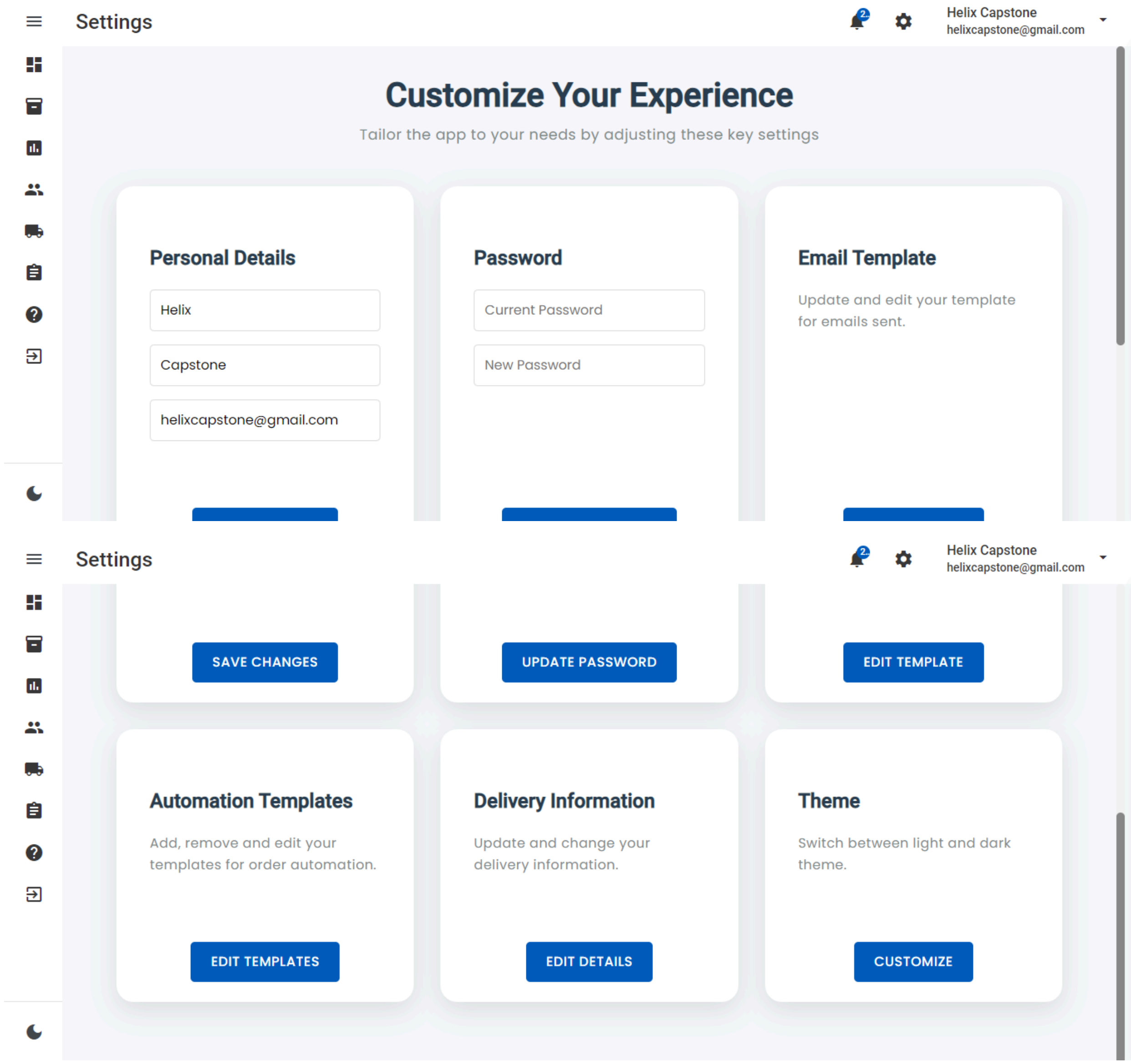
Profile/Settings



Navigating to Profile/Settings

1. Click the icon above in the header gear icon to navigate to the settings page.

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.
3. Then click save to persist the change.

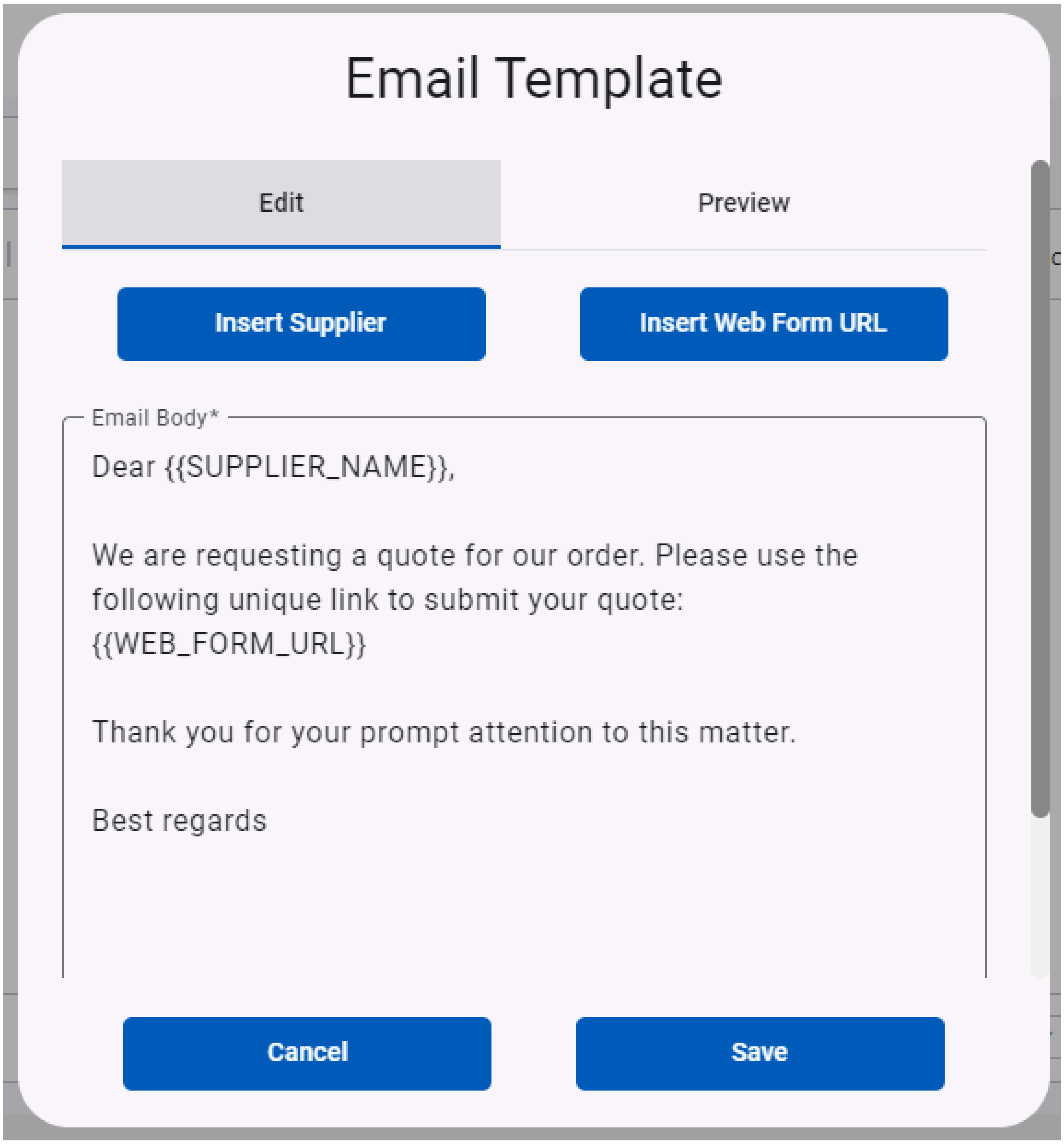
Changing Your Password

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.

Mode

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



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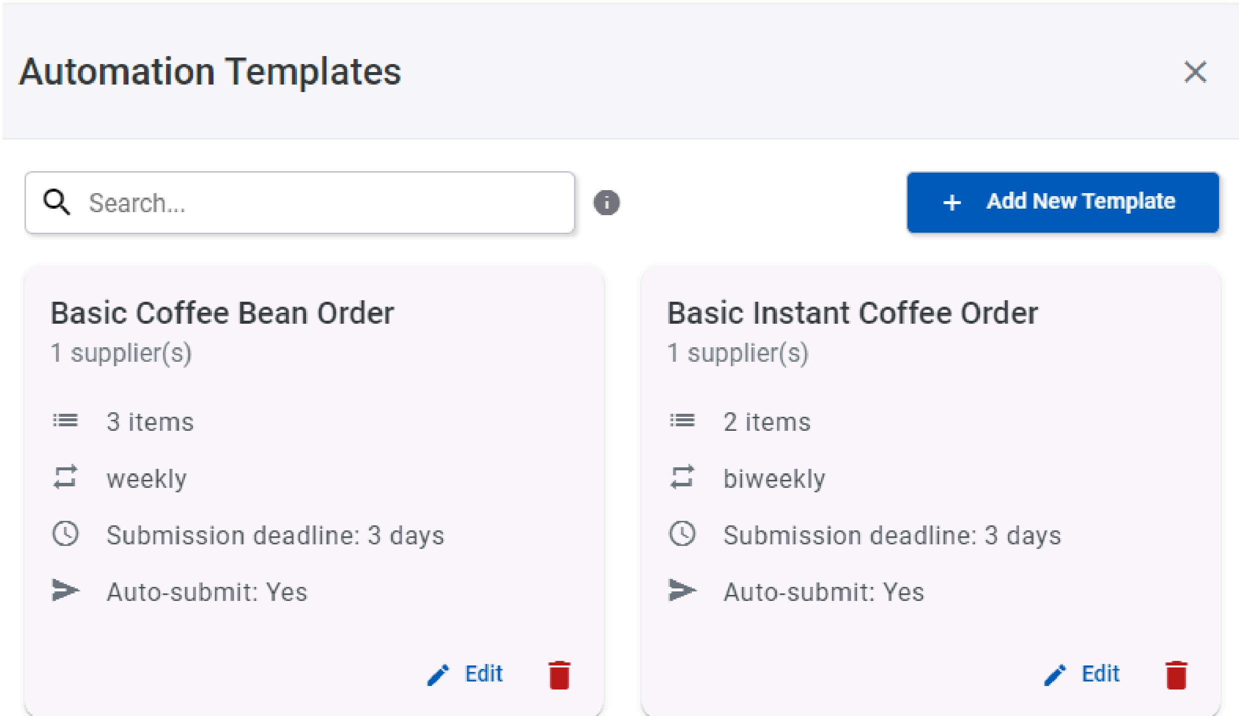

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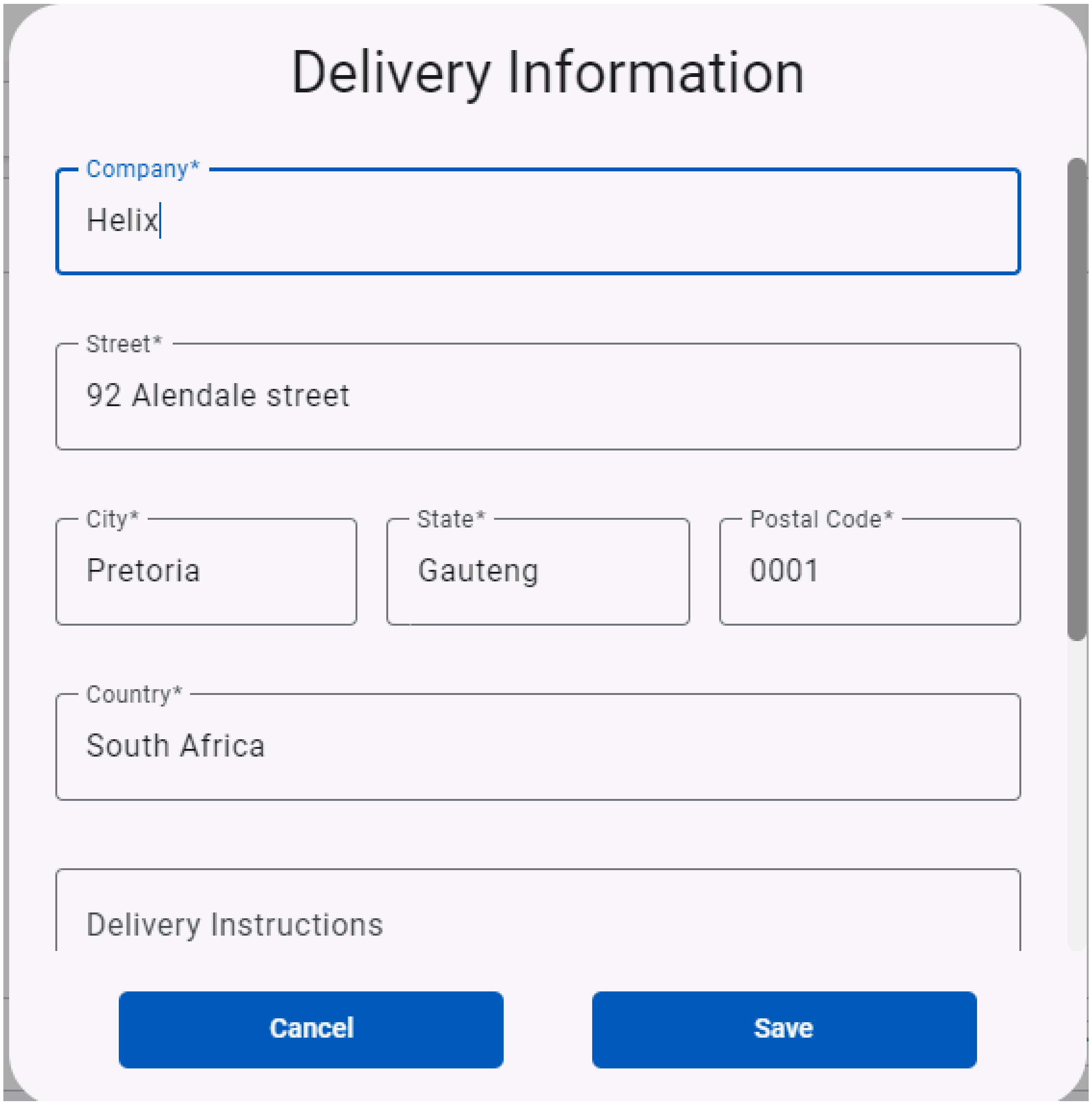

Delivery Information

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2. Now fill in the necessary info you can also edit with the same process.

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.

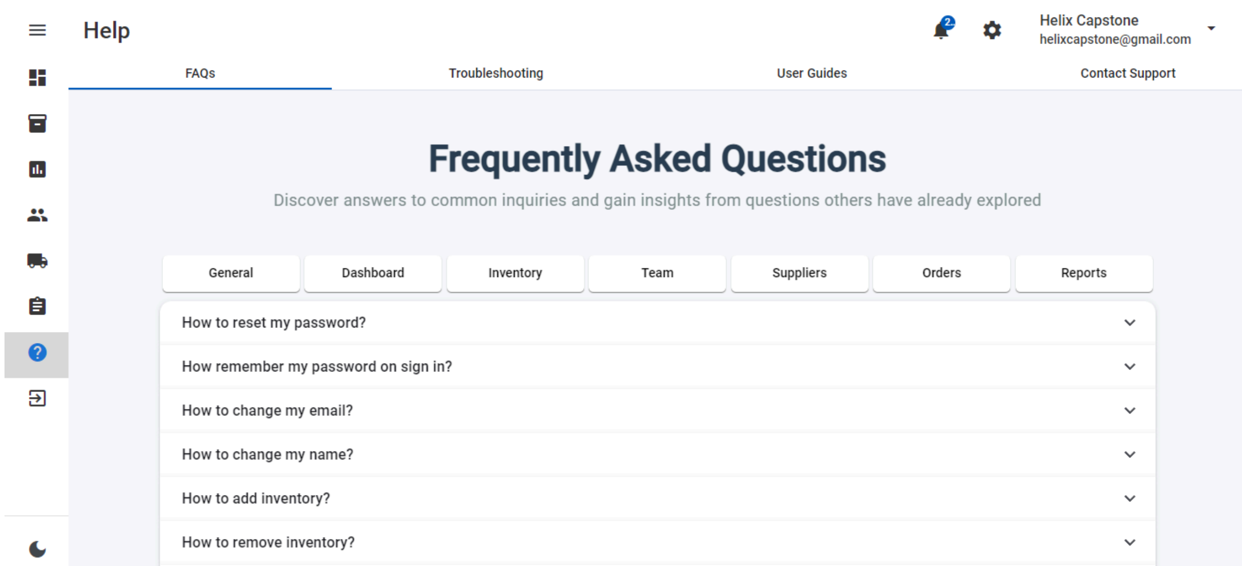
Help Tabs

- 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.

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.

FAQs



Process to read answers to questions

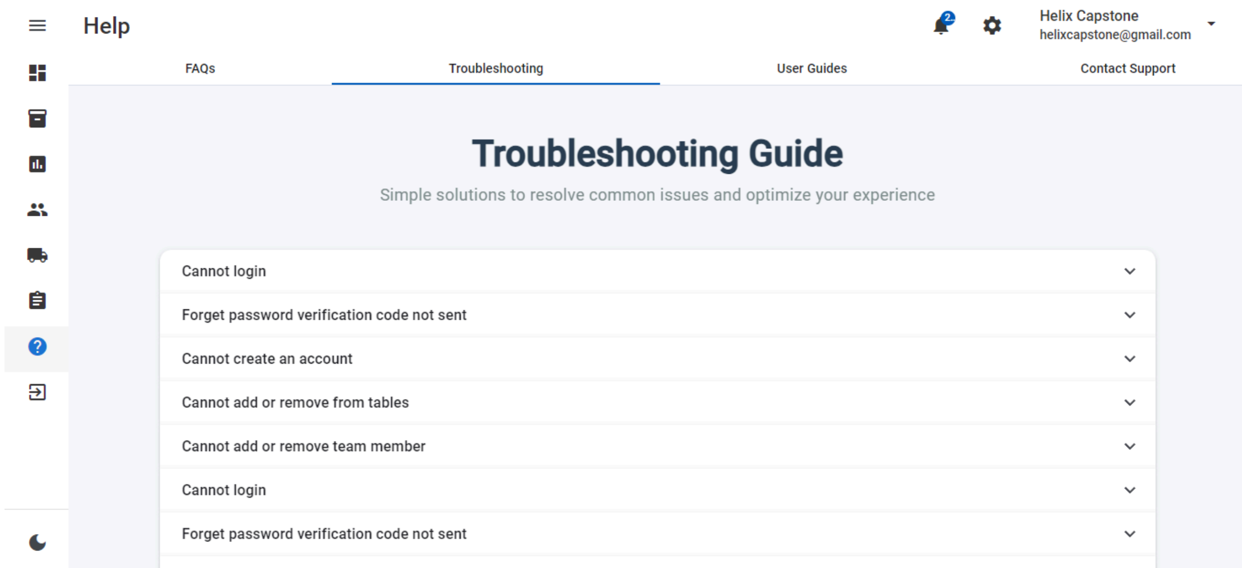
1. To use FAQs it is relatively simple if you have a question. Look for one similar or that interests you.
2. Then you should just click on the question and the answer will drop down below it.

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.

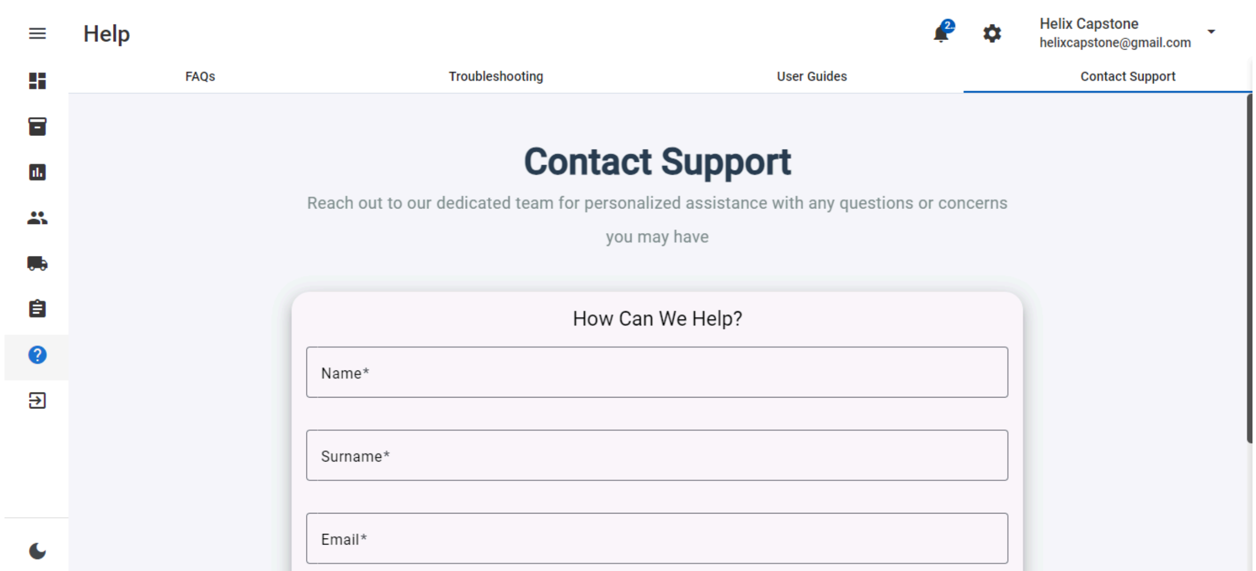
2. The button you click should filter all FAQs according to the page you selected.

Troubleshooting



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

Contact Support



1. Access the contact form to submit any queries directly to support.
2. Fill out your name, email address, and a detailed message describing your issue or question.

3. Click 'Send' to submit your request. Support staff will respond to your inquiries as quickly as possible.