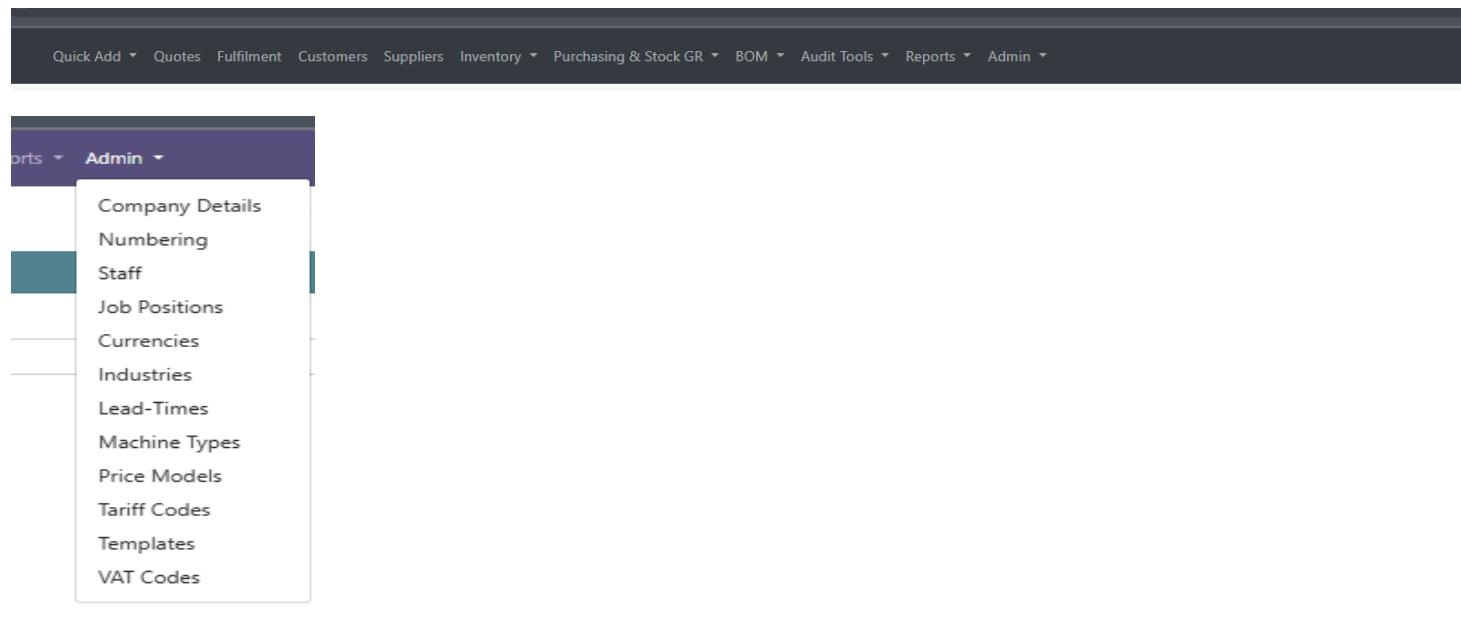


ADMIM MODULE

THIS IS A VERY IMPORTANT STEP. EVERYTHING HAS TO BE FILLED IN ACCORDINGLY.

Steps

1. **Locate the Admin tab** — found on the **far right** of the main navigation.
2. **Open Admin** — click the **Admin** tab.
3. **View options** — the Admin page will display various configuration options.



COMPANY DETAILS.

Manage company details.

When you click on Company Details in the Admin Module.

Steps:

1. Click on **Company Details** under the **Admin** tab.
2. You will see **two sections** displayed:
 - o **Manage Company Details**
 - o **Manage Branch**

Make sure that **all details entered are true and accurate.**

Manage Company Details

Name:	Prism DX Demo (Pty) Ltd
Registration Number:	
VAT Number:	4012345678
Physical Address:	8 Harfield Road, Claremont, Cape Town, South Africa, 7708
Postal Address:	
Contact Number:	+27 11 123 4567
Email:	info@prismdx.com
Website:	www.prismdx.com
Internal API Code:	
Logo:	
<input type="button" value="Edit"/> <input type="button" value="Logo"/>	

Manage Branch

To add a branch under Manage Branch.**Steps:**

1. Scroll down to the **Manage Branch** section under **Company Details**.
2. Click on the **Add** button.
3. You will be redirected to a new page called the **Branch Page**.

Manage Branch			
<input type="button" value="Reset Filters"/> <input type="text" value="Search..."/> <input type="button" value=""/>			
Branch	Code	Address	<input type="button" value="Add"/> <input type="button" value="Edit"/>
Prism DX Demo (Pty) Ltd	B00001	1 Top Road, Pomona, Kempton Park, Gauteng, South Africa, 1619	<input type="button" value="Edit"/>
<input type="button" value=""/> <input type="button" value=""/> 1 <input type="button" value=""/> <input type="button" value=""/> 50 <input type="button" value=""/> items per page	1 - 1 of 1 items <input type="button" value=""/>		

Steps:

1. On the **Branch Page**, you will see two parts — the **top section** and several **tabs** at the bottom.
2. The bottom section includes the following tabs: **Staff**, **Teams**, **Warehouse**, **Tote**, **API Leadtime**, and **Banking Details**.
3. Start by filling in all the required details in the **top section**.
4. If the company operates **globally**, make sure the **Global** option is turned **on**.
5. If the company operates **locally**, leave the **Global** option **off**.

Home > Branch-Details > Edit

Branch							
Branch Name	Telephone						
Prism DX Demo (Pty) Ltd	+27 11 123 4567						
Code	Is Global						
B00001	<input checked="" type="checkbox"/> YES						
Physical Address							
1 Top Road							
Pomona							
Kempton Park							
Gauteng							
1619							
<input type="button" value="Staff"/> <input type="button" value="Team"/> <input type="button" value="Warehouse"/> <input type="button" value="Tote"/> <input type="button" value="API LeadTime"/> <input type="button" value="Banking Details"/>							
<table border="1"> <tr> <td>Supplier</td> <td>Lead Time Override</td> <td>Is Active</td> </tr> <tr> <td><input type="button" value=""/> <input type="button" value=""/> 0 <input type="button" value=""/> <input type="button" value=""/> 50 <input type="button" value=""/> items per page</td> <td><input type="text"/> <input type="button" value=""/></td> <td>No items to display <input type="button" value=""/></td> </tr> </table>		Supplier	Lead Time Override	Is Active	<input type="button" value=""/> <input type="button" value=""/> 0 <input type="button" value=""/> <input type="button" value=""/> 50 <input type="button" value=""/> items per page	<input type="text"/> <input type="button" value=""/>	No items to display <input type="button" value=""/>
Supplier	Lead Time Override	Is Active					
<input type="button" value=""/> <input type="button" value=""/> 0 <input type="button" value=""/> <input type="button" value=""/> 50 <input type="button" value=""/> items per page	<input type="text"/> <input type="button" value=""/>	No items to display <input type="button" value=""/>					
<input type="button" value="Save"/> <input type="button" value=""/> <input type="button" value="Close"/>							

Staff tab

To add staff members from this specific branch that will have access to Prismdx.

Steps:

1. Click on the Staff tab on the Branch Page.

2. Click on the Add button.
3. Add each staff member who will have access to the PrismDX system individually.

Team

To add teams under the Teams tab in PrismDX.

Steps:

1. Click on the Teams tab on the Branch Page.
2. Click on the Add button.
3. Add all the teams relevant to your company individually.

Warehouse

To add warehouse details under the Warehouse tab in PrismDX.

Steps:

1. Click on the Warehouse tab on the Branch Page.
2. Click on the Add button.
3. Enter all warehouse details accurately, including location and any other required information.

Tote

To add tote information under the Tote tab in PrismDX.

Steps:

1. Click on the Tote tab on the Branch Page.
2. Click on the Add button.
3. Enter all tote details as required.

API LeadTime

Automatically generated.

Banking details

Steps:

1. Click on the **Banking Details** tab on the Branch Page.
2. Click on the **Add** button.
3. Enter all the correct banking details for the branch.
4. Review the information carefully to ensure accuracy before saving.

This the company banking details and can be more than one.

Company details will appear on the invoice that you send to your customer.

NUMBERING

Home > Numbering

Manage Numbering

Type	Customer	Reset Filters	Search...	Filter
Name	Customer			
Custo	Supplier			
Inventory				
50 Purchasing				
Sales				
Branch				

Steps:

1. Open PrismDX on your computer and go to the section where you manage your **unique numbering codes**. This is where you will create codes for different items or categories within the system.
2. Once in this section, you will see a **Type** field with a **drop-down menu** next to it. Click on the drop-down menu to view the different areas or items that require unique codes.
3. For each item listed under the drop-down menu, you need to **set up a unique code**. These codes help you organize and identify various elements such as products, parts, customers, or other entities that need to be tracked separately.
4. When setting up your codes, you have the option to decide whether each code will be **Auto Assigned** or **Manually Assigned**:
 - o If you choose **Auto Assigned** (recommended), PrismDX will automatically generate the next available code based on your sequence. This ensures consistency and avoids duplication.
 - o If you choose **Manually Assigned**, you will enter the codes yourself. This option provides flexibility if you have a custom numbering system already in place.
5. To create a new code, select the appropriate **Type** from the drop-down list, then either allow the system to auto-generate it or input your own unique code manually.
6. Review each code entry to ensure that it follows your company's coding format and that there are no duplicates or errors.
7. Once all your codes have been set up, **save your changes** to apply the numbering system across the platform.
8. You can **edit your codes at any time** if you need to make changes or add new items later. To do this, simply return to the same section, select the code type, and make the necessary updates.
9. It is recommended to keep a short reference list of your codes and their meanings for internal use. This helps your team maintain consistency and understand what each code represents.

By following these steps, you ensure that your PrismDX system maintains a clean and organized structure, making it easier to search, manage, and track information efficiently.

STAFF

To manage staff under the Staff tab.

Steps:

1. Click on the **Staff** tab on the Branch Page.
2. This section will display a list of **all staff members across your entire company**.
3. From here, you can **view, edit, or remove** existing staff members as needed.
4. To add a new staff member, click on the **Add** button.
5. Enter the required details for the new staff member and save your changes.
6. Use this tab anytime you need to **manage staff access** or update staff information within the PrismDX system.

Manage Staff

Staff	Team
<input type="button" value="Reset Filters"/>	<input type="text" value="Search..."/> <input type="button" value=""/>
Branch	Personnel Number
Email	Mobile

JOB POSITION

To set up job positions.

Steps:

1. Go to the **Job Position** section within the Admin Module.
2. This is where you define the **job titles** that exist within your company.
3. Click on the **Add** button to create a new job position.
4. Enter the **job title** and any relevant details or descriptions.
5. Save the entry once all information has been filled in.
6. These job positions will later be **linked to staff members**, allowing you to assign each person the correct role within the system.

Home > Job Positions

Manage Job Positions

Name	Is Active	<input type="button" value="Add"/>
ACCOUNTS ASSISTANT	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
ADMINISTRATION	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
BUYER	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
CREDITORS	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

CURRENCIES

To manage currencies.

Steps:

1. Go to the **Currencies** section within the Admin Module.
2. This section allows you to **manage, add, delete, or edit** the currencies your company will use when working with different clients.
3. To **add a new currency**, click on the **Add** button and select the currency you want to include.
4. To **edit** an existing currency, click on it, make the necessary changes, and save your updates.
5. To **delete** a currency, select it from the list and click on the **Delete** option.
6. Review your list of active currencies to ensure that only the ones relevant to your business and clients are enabled.

Home > Currencies

Manage Currencies

Code	Name	Symbol	Is Active	<input type="button" value="Add"/>
EUR	EURO	€	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
ZAR	SOUTH AFRICA RAND	R	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
GBP	UNITED KINGDOM POUND	£	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
USD	UNITED STATES DOLLAR	\$	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
AUD	AUSTRALIAN DOLLAR	AU\$	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
NAD	NAMIBIAN DOLLAR	N\$	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
ZMW	ZAMBIAN KWACHA	ZMW	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
CHF	Swiss Franc	fr.	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
TST	TEST	T	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

1 - 9 of 9 items

INDUSTRIES

To manage industries.

Steps:

1. Go to the **Industries** section within the Admin Module.
2. This section allows you to **manage, edit, or delete** the industries your company will be working with.
3. To **add a new industry**, click on the **Add** button and enter the industry name and any relevant details.
4. To **edit** an existing industry, select it from the list, update the information as needed, and save your changes.
5. To **delete** an industry, choose it from the list and click on the **Delete** option.
6. Review your list of industries regularly to ensure it accurately reflects the sectors your company is involved in.

The screenshot shows a table titled "Manage Industries". The columns are "Name" (sorted by name), "Is Active" (sorted by active status), and actions ("Edit" and "Delete"). The data rows include: Construction (Yes), Dealer (Yes), Engineering (Yes), Mining (Yes), Plant Hire (Yes), Rebuilder (Yes), and Reseller (Yes). At the bottom, there are navigation buttons (Back, Forward, Home) and a dropdown for "Items per page" set to 50, with a total of 7 items shown.

Name	Is Active	
Construction	Yes	
Dealer	Yes	
Engineering	Yes	
Mining	Yes	
Plant Hire	Yes	
Rebuilder	Yes	
Reseller	Yes	

LEAD TIMES

To set and manage lead times.

Steps:

1. Go to the **Lead Times** tab within the Admin Module.
2. This section allows you to set your **delivery times or days**, also known as lead times.
3. To **add** a new lead time, click on the **Add** button and enter the delivery duration or schedule.
4. To **edit** an existing lead time, select it from the list, update the information, and save your changes.
5. To **delete** a lead time, select it and click on the **Delete** option.
6. Review all lead times to ensure they accurately reflect your company's delivery schedules and commitments.

The screenshot shows a table titled "Manage Lead Times". The columns are "Description" (sorted by description), "Unit" (sorted by unit), "Value" (sorted by value), "Is Active" (sorted by active status), and actions ("Edit" and "Delete"). The data rows include: 1 Day (Days, 1, Yes), 10 Days (Days, 10, Yes), 10-14 Days (Days, 14, Yes), 3 Hours (Hours, 3, Yes), 3 Weeks (Weeks, 3, Yes), 5 Days (Days, 5, Yes), 5-7 Days (Days, 7, Yes), 7-10 Days (Days, 10, Yes), and STOCK (Hours, 1, Yes). At the bottom, there are navigation buttons (Back, Forward, Home) and a dropdown for "Items per page" set to 50, with a total of 9 items shown.

Description	Unit	Value	Is Active	
1 Day	Days	1	Yes	
10 Days	Days	10	Yes	
10-14 Days	Days	14	Yes	
3 Hours	Hours	3	Yes	
3 Weeks	Weeks	3	Yes	
5 Days	Days	5	Yes	
5-7 Days	Days	7	Yes	
7-10 Days	Days	10	Yes	
STOCK	Hours	1	Yes	

MACHINE TYPES

Name	Part Prefix	Is Active	Action
CASE		Yes	Edit Delete
CAT		Yes	Edit Delete
JCB		Yes	Edit Delete
FORD		Yes	Edit Delete
JOHN DEERE		Yes	Edit Delete

Steps:

1. Go to the **Machine Types** section within the Admin Module.
2. This section allows you to manage all the **machine types** your company may have as part of its inventory.
3. To **add** a new machine type, click on the **Add** button and enter the machine name (e.g., **CAT, ESCO, CASE**, etc.).
4. To **edit** a machine type, select it from the list, make the necessary updates, and save your changes.
5. To **delete** a machine type, choose it from the list and click on the **Delete** option.
6. Keep this list updated to ensure that all machine types in your inventory are accurate and relevant.

PRICE MODELS

Model	Brand	Condition	Percentage	Is Active	Action
Discount % off CAT Lift (BRAND = CAT / CONDITION = SUR..)			0	Yes	Edit Delete
Discount % off CAT lift (BRAND = ALL NON-CAT / CONDITION..)			50	Yes	Edit Delete
Minimum Margin %			20	Yes	Edit Delete

You can set the minimum margin %

How is margin calculated:

TARRIFCODES

The screenshot shows a table with columns: Heading, Duty, Description, Is Active. A single row is selected with values: 7318, 30, blank, Yes. Action buttons at the bottom right include + Add, Edit, and Delete.

Heading	Duty	Description	Is Active
7318	30		Yes

TEMPLATES

The screenshot shows a template configuration for "BOM Child Packing Slip". It includes sections for Header, Content, and Item details, each with save buttons and placeholder code snippets like [loop] and [documentType].

MANAGE VAT.

VAT values. You can also manage this . Just click Edit on the value you want to edit.

The screenshot shows a table with columns: Code, Name, VAT Percentage. Four rows are listed: ST (Standard Rated, 15%), NV (Non Vendor, 0%), ZE (Zero Rated, 0%), and EX (Exempt, 0%). Each row has an Edit button next to the VAT Percentage value.

Code	Name	VAT Percentage
ST	Standard Rated	15
NV	Non Vendor	0
ZE	Zero Rated	0
EX	Exempt	0