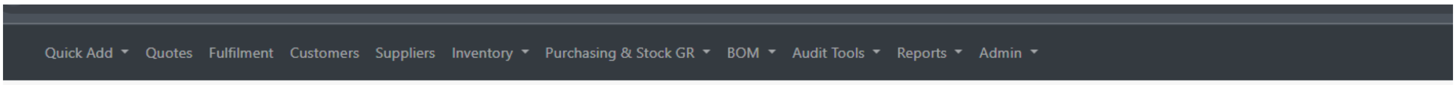
ADMIM MODULE

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.

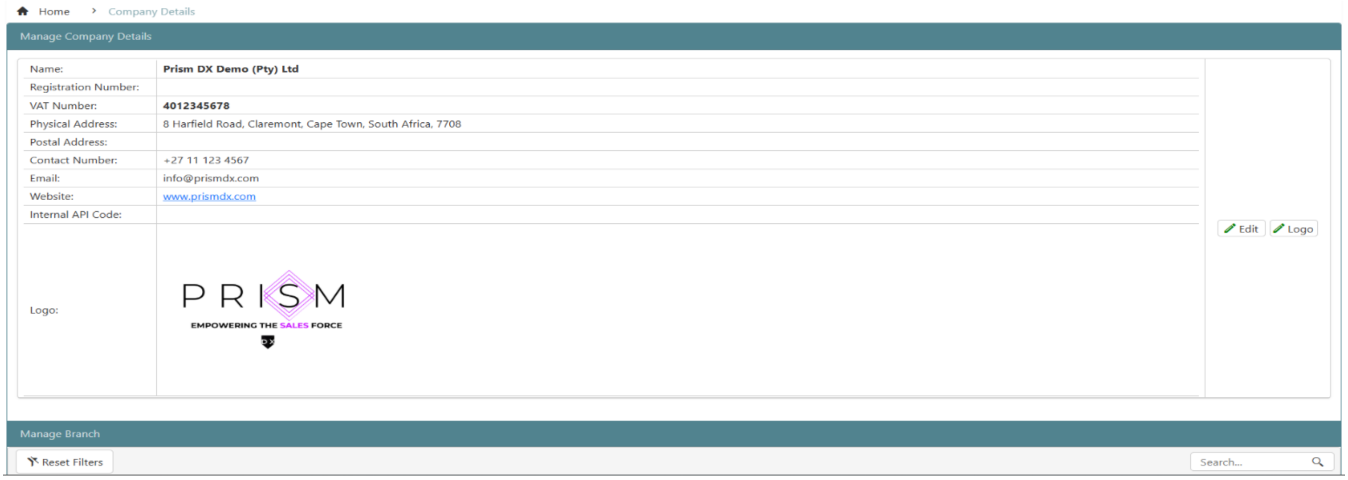
Manage company details.

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:
    - **Manage Company Details**
    - **Manage Branch**

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



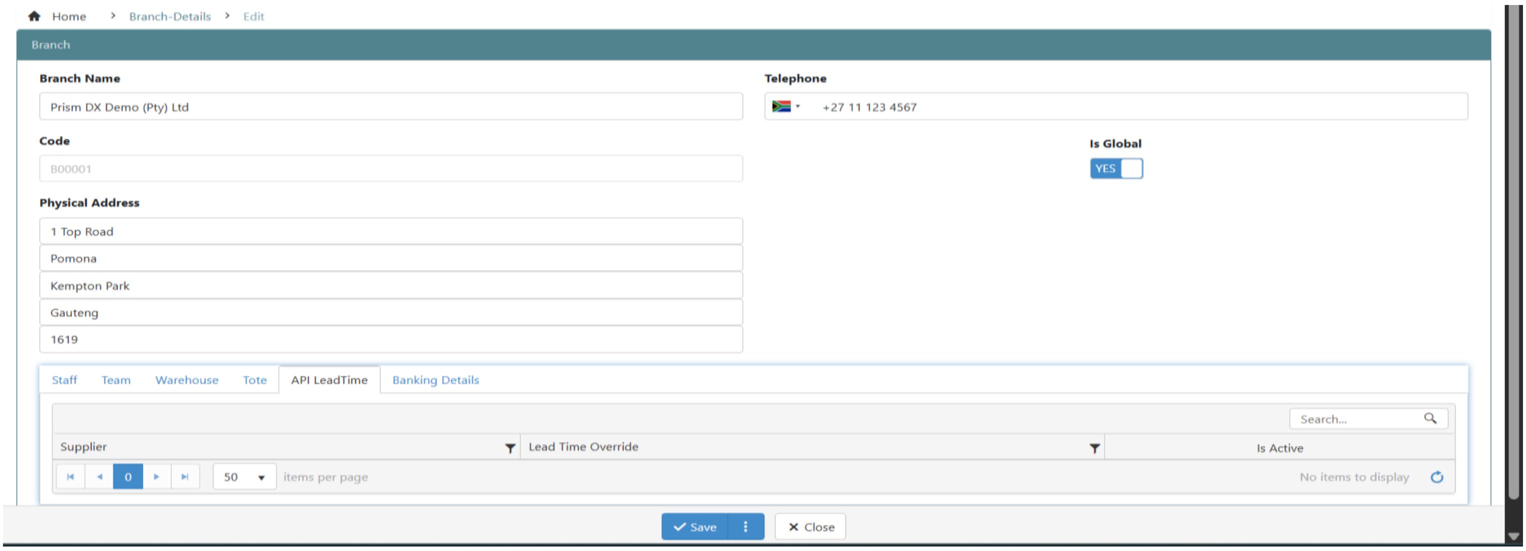
To add a branch under Manage Branch.

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**.

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**.



<u>Staff tab</u>

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

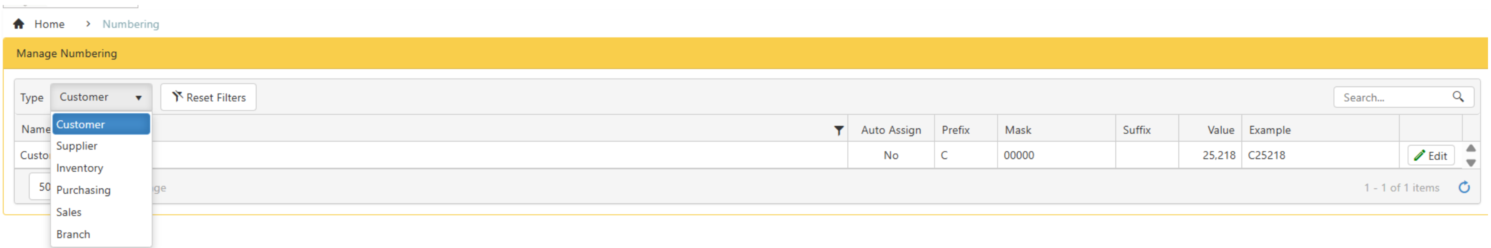
Steps:

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 that one.

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

Numbering



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**:
    - If you choose **Auto Assigned** (recommended), PrismDX will automatically generate the next available code based on your sequence. This ensures consistency and avoids duplication.
    - 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.

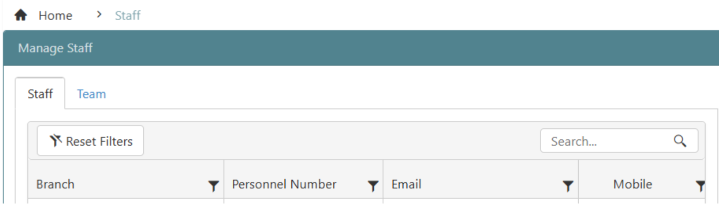
By following these steps, you ensure that your PrismDX system maintains a clean and organized structure, making it easier to search, manage, and track information efficiently.

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.



Job position

To set up job positions.

Steps:

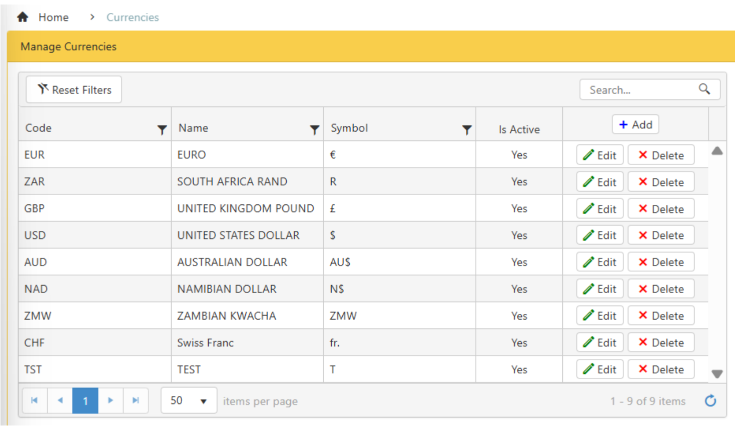
1. Go to the **Job Position** section within the Admin Module.
2. This is where you define the **job titles** that exist within your company.
3. Click on the **Add** button to create a new job position.
4. Enter the **job title** and any relevant details or descriptions.
5. Save the entry once all information 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.

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.

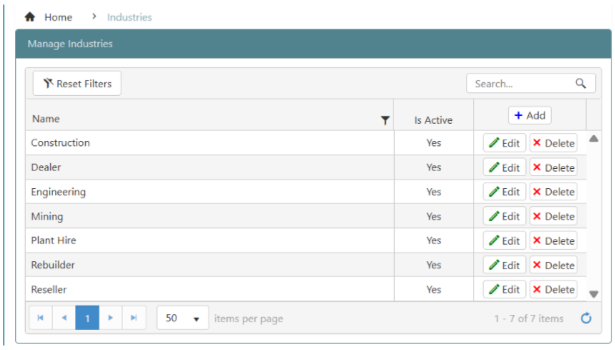


Industries

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.

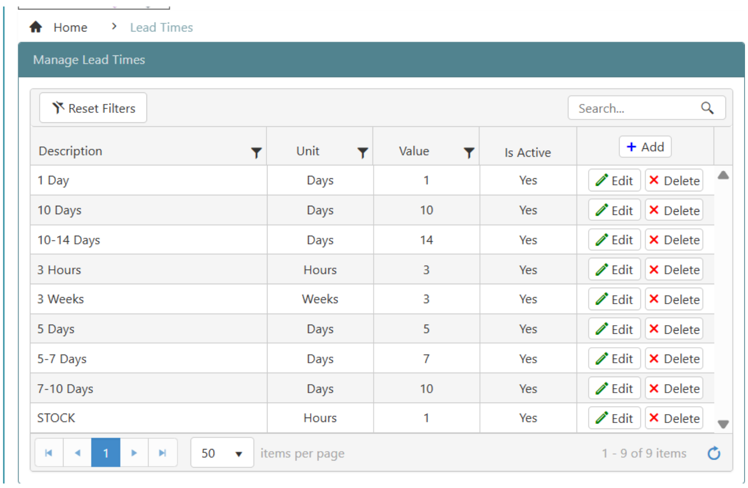


Lead Times

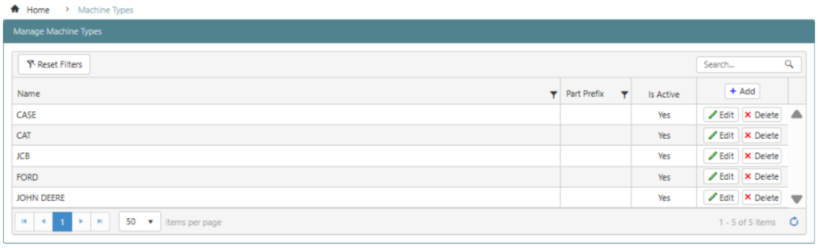
To set and manage lead times.

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.



Machine Types



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.

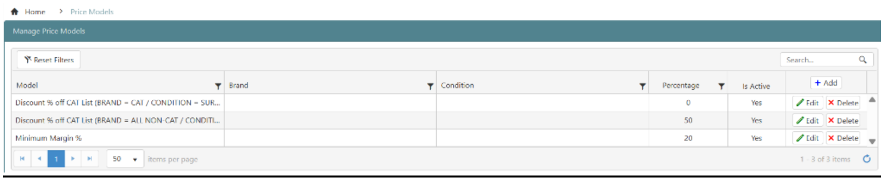
3. To **add** a new machine type, click on the **Add** button and enter the machine name (e.g., **CAT**, **ESCO**, **CASE**, etc.).

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

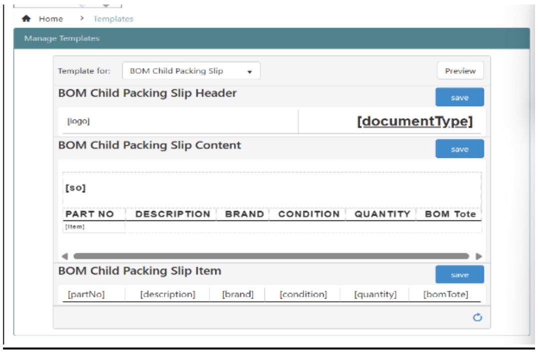


You can set the minimum margin %

How is margin calculated:

TarrifCodes

Templates



Manage VAT.

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