

Hayley Smarttime Admin User Guide

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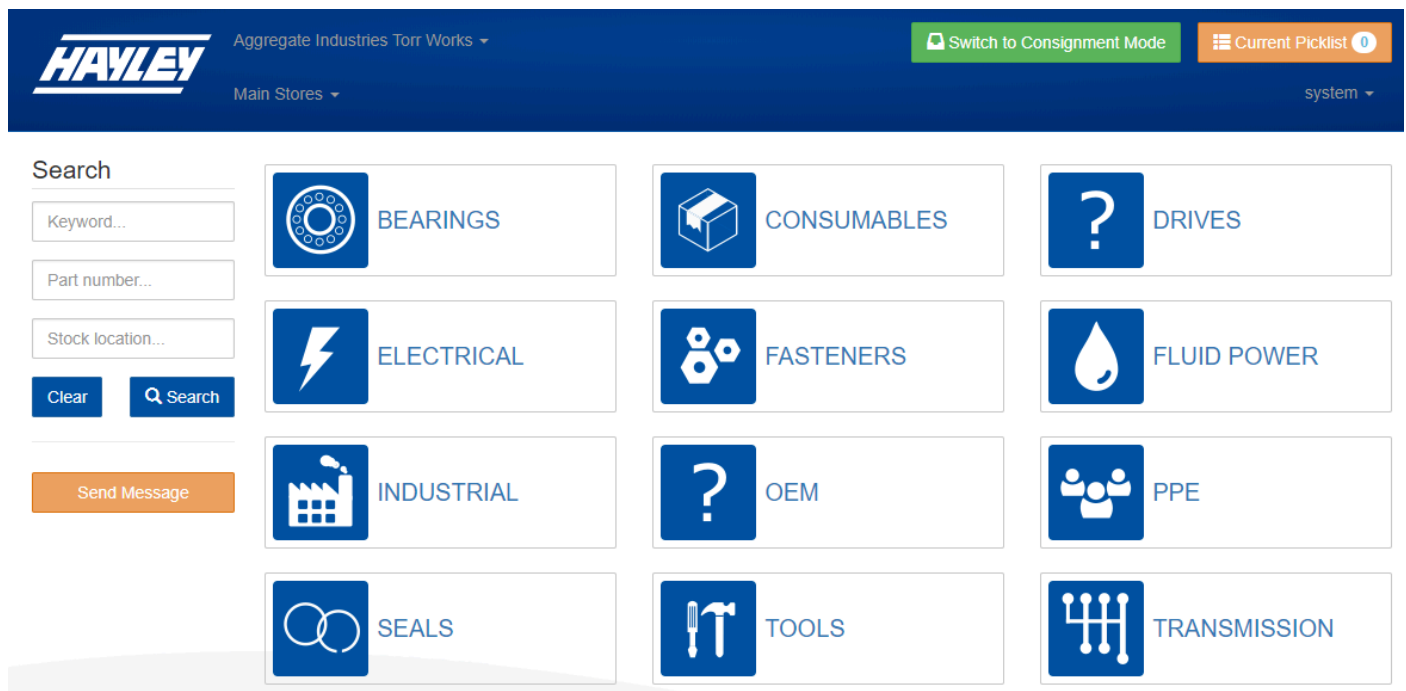
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National Accounts and Rail

The Home Screen

When you first log in to the Hayley Smarttime system, you'll see the following screen:



Within this screen, there are three main sections: the header, the search facility and the category listing.

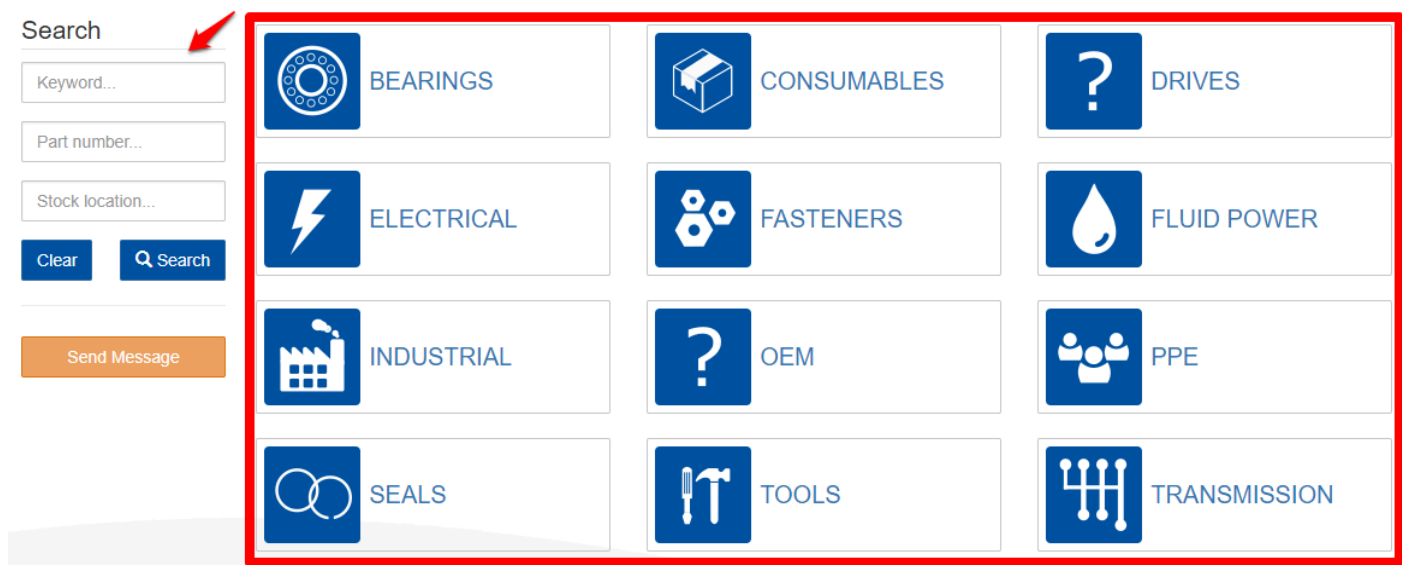
The Header



Within the header, the notable features are:

- **The Customer list** - Clicking this drop-down shows you a list of all the customers that you have permission to impersonate.
- **The Site list** - Clicking this drop-down shows you a list of all the sites that you have permission to view.
- **The 'Switch Mode' button** - Clicking this button will switch between Picklist Mode and Consignment Mode (if you have permission for consignments).
- **The 'Current Items' button** - The counter in this button shows you how many items are in the current picklist/consignment (depending on which mode you're in). Clicking the button takes you to a page that shows the details of what is in the current picklist/consignment.
- **The User Options list** - Clicking this drop-down gives you the options for Change Password, Admin and Log Out.

The Search Facility & Category List



Within the lower half of the screen, the notable features are:

- **The Search facility** - This is available on all pages. Within this facility you can search by Keyword, Part number or Stock location by using the relevant field. You can then generate the search by clicking Search or remove any text using Clear. Using the Send Message button generates a pop up where you can send a message to Mark Harrison.
- **The Category listing** - this area shows the product categories that are listed under each site. If you change the site or the customer, this page will change to reflect the product categories used by that particular site.

Creating a Picklist

You have two ways to find a product to add to a picklist:

1. Using the Search facility
2. Using the Category listing

To use the Search facility, enter your search terms into the relevant field and click Search. This will generate the following screen:

Part number	Location	Name	Present stock	Select quantity			Issue to picklist	Admin
AI002978	PB5C1	Allis Bearing Kit	0	-	1	+	Issue as item(s)	⚙️
AI002958	PB3C2	Allis Chalmer Bearing Housing x 2 S1,S2 & S3 Screen	0	-	1	+	Issue as item(s)	⚙️
AI002500	F4A1	01B110MEX Cooper Expansion Cylindrical Roller Bearing	0	-	1	+	Issue as item(s)	⚙️
AI002501	F4A2	01B110MGR Cooper Fixed Cylindrical Roller Bearing	0	-	1	+	Issue as item(s)	⚙️
AI002494	F3A1	01B125MEX Cooper Expansion Cylindrical Roller Bearing.	0	-	1	+	Issue as item(s)	⚙️
AI002487	F2A1	01B150MEX Cooper Expansion Cylindrical Roller Bearing.	0	-	1	+	Issue as item(s)	⚙️
AI002488	F2A2	01B150MGR Cooper Fixed Cylindrical Roller Bearing	0	-	1	+	Issue as item(s)	⚙️
AI002485	F1A1	01B155MEX Cooper Cylindrical Expaller Bearing	0	-	1	+	Issue as item(s)	⚙️
AI002486	F1A2	01B155MGR Cooper Fixed Cylindrical Roller Bearing	0	-	1	+	Issue as item(s)	⚙️
AI002495	F2D1	01B200MEX Cooper Expansion Cylindrical Roller Bearing.	0	-	1	+	Issue as item(s)	⚙️

To use the Category listing, from the Home Screen, select the category that contains the product you're looking for. This will take you to the Subcategory list:

Categories /  BEARINGS
⬅ Back

ANGULAR CONTACT BEARING
ANGULAR CONTACT BEARINGS SINGLE ROW
BALL BEARING DEEP GROOVE IMPERIAL
BALL BEARING DEEP GROOVE METRIC
BEARING SPHERICAL ROLLER
COOPER BEARINGS
CYLINDRICAL ROLLER BEARINGS
DOUBLE ROW ANGULAR CONTACT
HOUSED BEARINGS
PLAIN SPHERICAL BEARINGS - INA
PLUMMER BLOCK & ACC - SKF
PLUMMER BLOCK & ACCESSORIES
POPULAR METRIC BEARINGS
POPULAR METRIC BEARINGS - FAG
POPULAR METRIC BEARINGS - OTHERS
SELF ALIGNING BALL BEARINGS

You can then select the subcategory that the product is in, which will take you to the product list:

Categories / BEARINGS / ANGULAR CONTACT BEARING
⬅ Back

Part number	Location	Name	Present stock	Select quantity	Issue to picklist	Admin
V6411	V12	BEAVER BLACK METAL FREE 4-EYELET SHOE EN20345:2011-S3 SIZE 10	0	- 1 +	Issue as item(s)	⚙

This is a list of all products that are in the selected subcategory. This is the same screen as when you search for a specific product.

Note: When viewing a Rail customer, there are VMI Areas as opposed to Categories. You navigate through this by Area - Bay - Rack - Shelf - Bin.

To specify a quantity of each product to add to the picklist, you can either type in the text box or use the +/- buttons to adjust the number.

Then click the 'Issue as item(s)' button to add the products to the picklist.

As an admin, you will also have a cog symbol next to each product. This allows you to edit the product, delete the product from the system, or view the barcode. Editing a product is explained further [here](#).

Part number	Location	Name	Present stock	Select quantity	Issue to picklist	Admin
AI002647	H5A1	MJT1.1/4M RHP Single Row Angular Contact Bearing	0	- 1 +	Issue as item(s)	 Edit Delete Barcode

Once you have added products to the picklist, you will be able to see a count for the amount of products added in the 'Current Picklist' button. Clicking this button will take you to the 'Current Picklist' page, which shows a detailed breakdown of what is in your picklist.

[Picklists](#) / Current Picklist
 Back

Part Number	Location	Name	Present Stock	Quantity	Actions
AI003033	PC2C2	Air Cylinders	24	- 1 +	Remove
123123	H5A1	MJT1.1/4M RHP Single Row Angular Contact Bearing	0	- 1 +	Remove
AI000158	H1C4B	21308-E1 FAG Spherical Roller Bearing	0	- 1 +	Remove

Costcentre
Category --- None ---

Previous Picklists

Type of code Barcode

Size 90x25mm

Print Barcodes

Print Preview

Post Picklist

Within this screen, the notable features are:

- **Quantity** - Here you can adjust the quantity of the products in the picklist.
- **Remove** - Clicking the 'Remove' button within the row will delete the product from the picklist.
- **Previous Picklists** - Clicking this shows a list of all previous picklists.
- **Costcentre** - Here you can enter the costcentre for your picklist or choose one from the dropdown. This is used for accounting and reporting purposes. Entering a costcentre will store it in the autocomplete function for use in future picklists.
- **Category** - Here you can select a product category to assign the picklist to.
- **Print Preview** - Clicking this will allow you to print the picklist.
- **Barcodes** - Using the 'Type of code' drop-down, you can choose between Barcode or QR Code. Using the 'Size' drop-down, you can change the size of the print-out for each of the codes. You can then print these using the 'Print Barcodes' button.
- **Post Picklist** - Clicking this will save the current picklist to the system, and clear the list.

Viewing Previous Picklists

Clicking the 'Previous Picklists' button takes you to the following page:

Picklists			← Back
Date	Picked By	Costcentre	
2017-12-08T10:04:46.913	system	Test	View
2017-12-07T11:47:26.33	system	cost	View
2017-11-22T11:19:24.54	system	Testreportingdemo	View

This list shows the basic details for all the previously posted picklists.

If you want to see further details about the picklist, clicking the 'View' button takes you to the following page:

Picklists / 2017-12-07T11:47:26.33

◀ Back

Part Number	Location	Name	Present Stock	Quantity
AI002647	H5A1	MJT1.1/4M RHP Single Row Angular Contact Bearing	0	4
AI002788	I5C5A	1330 2 5/8	1	1
AI000204	G3C3	RHP 1017-17 Bearing- RHP Metric	0	1
AI002546	G2B1	NP2 RHP Cast Iron Pillow Block Unit NP.	0	1
AI000208	G3B6	RHP 1040-40G Bearing- RHP Metric	3	1
AI000209	G3B8	RHP 1045-40G Bearing - RHP Metric	3	1

☰ Previous Picklists

Costcentre: cost

Operator: system

Date: 2017-12-07T11:47:26.33

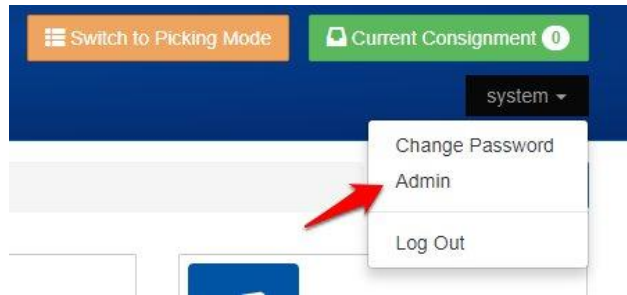
🗑 Delete

🖨 Print Preview

Here you can see a breakdown of details for the products included in the picklist. You can also delete the picklist and print the picklist.

Creating an Order

To start an order, click your username and, from the drop-down, click Admin.



On the Admin screen, click Orders, which will generate the following screen:

Admin / Orders
◀ Back

Create new order

Order number	SXE Order number	Purchase order number	Supplier	Created date	Status
DCDF963C-9426-4DAC-A7D1-63CDBBF4D8DB			Hayley Group Ltd	12/07/2018	Pending
4303A93E-BA94-4BBD-A27D-28BE13E2AAD2			Hayley Group Ltd	02/07/2018	Pending
767C54E9-E5AE-466B-830F-030E44EFB1B2		8		15/06/2018	Exported
71B82ACD-F289-4048-B70F-94E6FBB4B281			Hayley Group Ltd	15/06/2018	Pending
1DCC928E-FC96-4815-AC0A-3E9FC85FF8FF			OEM supplier	05/06/2018	Exported
37D4FF71-EF95-47B6-9D46-F0A5170A29B7		12345678	Hayley Group Ltd	02/05/2018	Pending
E4C5E906-D219-4F01-BC1E-B0BC7F3EE7F4			Hayley Group Ltd	02/05/2018	Pending
AFD95077-C463-438D-BBD8-44ADFEFA37F9			Hayley Group Ltd	02/05/2018	Pending
5956B58A-FAFC-46F4-907F-7EDA7EBDF634		no net	OEM supplier	25/04/2018	Exported
4EB8816F-942A-4CAA-8DF6-BC53DC748E83		test	OEM supplier	25/04/2018	Exported

« 1 2 3 4 5 »

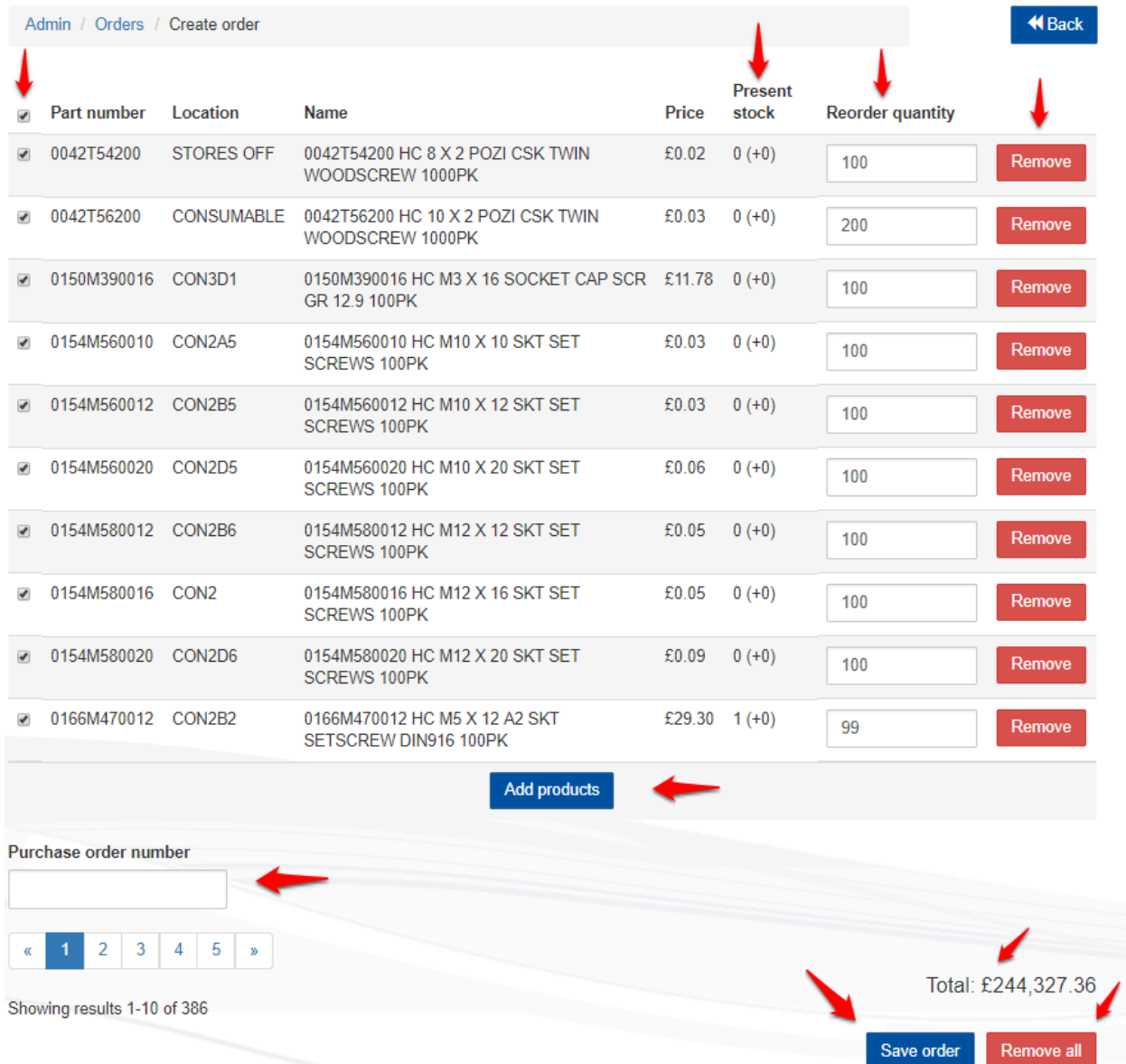
Showing results 1-10 of 62

This shows you a list of previous orders and their details.

Note: An order won't have an SXE number until it has been exported and a number has been returned to the system.

Additionally, an order won't have a Purchase order number unless one has been entered when submitting the order.

Clicking 'Create new order' will generate the following screen:



Admin / Orders / Create order Back

☒	Part number	Location	Name	Price	Present stock	Reorder quantity	
☒	0042T54200	STORES OFF	0042T54200 HC 8 X 2 POZI CSK TWIN WOODSCREW 1000PK	£0.02	0 (+0)	100	Remove
☒	0042T56200	CONSUMABLE	0042T56200 HC 10 X 2 POZI CSK TWIN WOODSCREW 1000PK	£0.03	0 (+0)	200	Remove
☒	0150M390016	CON3D1	0150M390016 HC M3 X 16 SOCKET CAP SCR GR 12.9 100PK	£11.78	0 (+0)	100	Remove
☒	0154M560010	CON2A5	0154M560010 HC M10 X 10 SKT SET SCREWS 100PK	£0.03	0 (+0)	100	Remove
☒	0154M560012	CON2B5	0154M560012 HC M10 X 12 SKT SET SCREWS 100PK	£0.03	0 (+0)	100	Remove
☒	0154M560020	CON2D5	0154M560020 HC M10 X 20 SKT SET SCREWS 100PK	£0.06	0 (+0)	100	Remove
☒	0154M580012	CON2B6	0154M580012 HC M12 X 12 SKT SET SCREWS 100PK	£0.05	0 (+0)	100	Remove
☒	0154M580016	CON2	0154M580016 HC M12 X 16 SKT SET SCREWS 100PK	£0.05	0 (+0)	100	Remove
☒	0154M580020	CON2D6	0154M580020 HC M12 X 20 SKT SET SCREWS 100PK	£0.09	0 (+0)	100	Remove
☒	0166M470012	CON2B2	0166M470012 HC M5 X 12 A2 SKT SETSCREW DIN916 100PK	£29.30	1 (+0)	99	Remove

Add products

Purchase order number

« 1 2 3 4 5 »

Showing results 1-10 of 386

Total: £244,327.36

Save order Remove all

Here you can see a list of the products that the system suggests should be in the order, based on what is in stock and what has been previously ordered.

Within this screen, the notable features are:

- **Remove/Remove All** - Clicking the 'Remove' button within a row will delete the product from the order. Clicking the 'Remove All' button will remove all added products from the order.
- **Checkboxes** - The checkboxes to the left of each row also allow you to decide which products to include in the order. The checkbox at the top of the column will select/deselect all products.
- **Present stock** - This shows the amount of current stock for each product. The number in brackets represents how many are currently on order.
- **Reorder quantity** - This shows the amount of each product that will be ordered. You can change this by typing in the field.
- **Add products** - Clicking this generates a window where you can search for products and add them to the order.
- **Purchase order number** - Here you can enter the PO number that this order relates to. This will then populate the relevant column on the Order summary screen.
- **Total** - This shows the total cost for the order.
- **Save order** - This saves the order to the system. In the orders list, this will appear as Pending until the order is sent to SXE, at which point the status will change to Exported.
Note: If there is a product in the order that doesn't have an SXE number, the order won't be sent until this is added.

Adding Products

When you click the 'Add products' button, the following window is generated:

Add products
×

Part number	Location	Name	Present stock	Reorder quantity	
AI000606	F5C4	01C3EX Cooper Triple Labyrinth Housing	9	0	<button>Add to order</button>
AI003033	PC2C2	Air Cylinders	0	0	<button>Add to order</button>
AI002978	PB5C1	Allis Bearing Kit	0	0	<button>Add to order</button>
AI002958	PB3C2	Allis Chalmer Bearing Housing x 2 S1,S2 & S3 Screen	0	0	<button>Add to order</button>
AI002982	PB5D3	Allis P Screen Inner Compression Springs	0	0	<button>Add to order</button>
AI003007	PC2D2	Bush SandVik Cone	0	0	<button>Add to order</button>
AI002995	PB6C1	Crusher Track Idler Wheel (CAT)	0	0	<button>Add to order</button>
AI003027	PC1A2	DM4 Track Motor Gear Box	0	0	<button>Add to order</button>
AI002986	PB5D7	GEC Screen Compression Spring	0	0	<button>Add to order</button>
AI003036	PC4C	Hammer Mill Heat Exchanger	0	0	<button>Add to order</button>

This is a list of all products that are available for you to purchase, depending on customer and site. You can use the search facility at the top of the window to search for a specific product, then use the 'Add to order' button to add the product to the order list.

Viewing a Previous Order

To show a detailed breakdown of the order, click the order number you wish to view. This will generate the following:

Admin /  Orders / order-details

◀ Back

Order number 6A009E54-6454-46F6-A84A-DDBA7DD3B924

Purchase Order number 123456

Supplier Hayley Group

Created date 09/08/2018

Status Pending

Product	Quantity
9A86.03.21X0.99 LEGRIS COUPLING	3
"3.5M BLACK, YELLOW PET BARRIER & STANCHION TAPE CASSETTE FOR USE WITH ADVANCE 2000 WALL MOUNTED BARR"	4
"BURGESS 334628 SPDT-NO/NC PLUNGER MICROSWITCH, 15 A@ 240 V AC M9CTCMSA"	5
10FT100A3X10FT RENOLD BLUE BOXED CHAIN	1
10FT113168X10FT RENOLD BOXED EXTENDED PITCH CHAIN	2

 Delete

Deleting an Order

Using the 'Delete' button within the order details screen, you're able to delete any orders that have not yet been sent to SXE.

 Admin /  Orders / order-details

◀ Back

Order number 6A009E54-6454-46F6-A84A-DDBA7DD3B924

Purchase Order number 123456

Supplier Hayley Group

Created date 09/08/2018

Status Pending

Product	Quantity
9A86.03.21X0.99 LEGRIS COUPLING	3
"3.5M BLACK, YELLOW PET BARRIER & STANCHION TAPE CASSETTE FOR USE WITH ADVANCE 2000 WALL MOUNTED BARR"	4
"BURGESS 334628 SPDT-NO/NC PLUNGER MICROSWITCH, 15 A@ 240 V AC M9CTCMSA"	5
10FT100A3X10FT RENOLD BLUE BOXED CHAIN	1
10FT113168X10FT RENOLD BOXED EXTENDED PITCH CHAIN	2

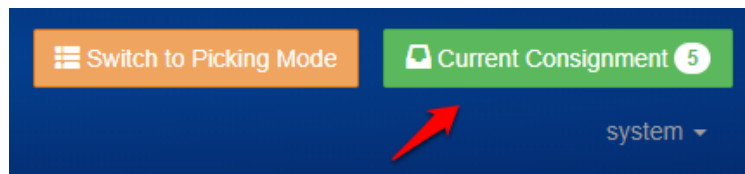
  Delete

Creating a Consignment

To start a consignment, switch to consignment mode using the 'Switch to Consignment Mode' button in the header (if you have access to this).

You search for products to add to a consignment in the same way that you do when adding items to a picklist.

When you add products to a consignment, they are counted in the 'Current Consignment' button:



Clicking this button takes you to the 'Current Consignment' page:

[Consignments](#) / [Current Consignment](#)
◀ Back

Part Number	Location	Name	Quantity	Actions
AI002437	D4F1	FAG 13009	- 1 +	Remove
AI002632	H3A1	FAG 6215-C3 BEARING	- 1 +	Remove
AI000322	H1A6	KOYO 6314 BRG BEARING	- 1 +	Remove
AI000579	H3A1	RHP 6215JCNSD6 BEARING	- 1 +	Remove

Dispatch no.

Order no.

Dispatch date

Previous Consignments
Post Consignment

Type of code

Barcode

Size

90x25mm

Print Barcodes

Within this screen, the notable features are:

- **Quantity** - Here you can change the quantity of the products you're consigning back into the stockroom.
- **Remove** - Clicking the 'Remove' button within the row will delete the product from the consignment.
- **Dispatch no.** - Here you can enter the dispatch number for the consignment.
- **SXE order no.** - This is a drop-down from which you can choose the SXE order that the consignment relates to. Order numbers will stay in this drop-down until all products from the order have been consigned.
- **Dispatch date** - Here you can enter the dispatch date for the consignment.
- **Previous Consignments** - Clicking this shows a list of all previous consignments.
- **Barcodes** - Using the 'Type of code' drop-down, you can choose between Barcode or QR Code. Using the 'Size' drop-down, you can change the size of the print-out for each of the codes. You can then print these using the 'Print Barcodes' button.
- **Post Consignment** - Clicking this will save the current consignment to the system, and clear the list. When the consignment is saved, the quantity of the products that were consigned will be updated to reflect what is now in stock.

Viewing Previous Consignments

As with picklists, you can view a list of previously posted consignments. Clicking the 'Previous Consignments' button will take you to the following page:

Admin / Consignments
◀ Back

Start date	Start date...	End date	End date...			
Date	Picked By	Order date	Order no.	Dispatch Date	Dispatch no.	Total price
12/12/2017 16:47	NG@alanbartlettandsons.co.uk					£14.30 View
12/12/2017 14:02	NG@alanbartlettandsons.co.uk			12/12/2017	4434338-02	£19.32 View
12/12/2017 12:41	NG@alanbartlettandsons.co.uk			12/12/2017	J331	£19.32 View
12/12/2017 07:16	NG@alanbartlettandsons.co.uk	06/12/2017 11:02	4430077	11/12/2017	4430077-01	£20.30 View
12/12/2017 07:15	NG@alanbartlettandsons.co.uk	07/12/2017 11:35	4432786	11/12/2017	4432786-00	£47.48 View
12/12/2017 07:14	NG@alanbartlettandsons.co.uk	08/12/2017 08:17	4434338	11/12/2017	4434338-01	£328.44 View
11/12/2017 09:43	NG@alanbartlettandsons.co.uk			08/12/2017	4433146-00	£13.68 View

This list shows the basic details for all previously posted consignments.

You also have the ability to filter this list by Start date and End date using the fields at the top of the list.

Clicking the 'View' button within each row will take you to the following screen:

Consignments / 18/12/2017 12:19				Back
Part Number	Location	Name	Quantity	Price
123123	H5A1	MJT1.1/4M RHP Single Row Angular Contact Bearing	2	£104.00
123123	H1C1B	FAG KLNJ12RS BEARING	1	£63.66
AI002633	H3A1	6215-2Z-C3 FAG Deep Groove Ball Bearing	1	£0.01
AI000157	H1A5	6408 SKF Deep Groove Ball Bearing	1	£0.01
AI002437	D4F1	FAG 13009	1	£0.01
AI002632	H3A1	FAG 6215-C3 BEARING	1	£269.23
AI000322	H1A6	KOYO 6314 BRG BEARING	1	£0.00
AI000579	H3A1	RHP 6215JCNSD6 BEARING	1	£0.01
				Total: £104.01
Previous Consignments Operator: Created Date: 18/12/2017 12:19 Dispatch Date: 25/12/2017 00:00 Dispatch No: 123456 Order Id: 59 Order No: 62AA4FDA-1EEC-4117-A83A-D142AD7B887B SXE Order No: 4258447				

This screen shows the details of the products within the consignment. It also shows other details about the consignment, including:

- Who made the consignment
- The date the consignment was created
- The dispatch date of the consignment
- The dispatch number of the consignment
- The order ID that the consignment relates to
- The order number that the consignment relates to
- The SXE order number that the consignment relates to

AMS

Creating an Asset

When you first log in to an AMS customer, you'll see the following screen:

Asset tracker	History	Asset register	Asset register archive
---------------	---------	----------------	------------------------

Asset Code (SKU)	Customer Description	Status	Collection Date	Notes	User	Due Date	Cost	Cust Ref	AMS Ref	Service Interval
There are currently no repairs to display										

If you have created repairs for an asset, they will appear here.

Clicking the 'Asset register' tab will take you to the following screen:

Asset tracker	History	Asset register	Asset register archive
---------------	---------	----------------	------------------------

+ Create Asset

Asset Code (SKU)	Customer Description	Vendor Description	Cost Centre	Asset	Status	Actions
1	test	test	1234	test asset	Good Condition	
2				another asset	Needs Repair	

If you have created any assets, they will appear here.

Next, click the 'Create Asset' button. This will generate the following pop-up dialog:

Create Asset
×

Asset Code (SKU)*		Asset Name*	
Customer Description		Vendor Description	
Type*	Engine ▼	Status*	Needs Repair ▼
Cost Centre		Stores Location	
Service Interval	Days ▼	Service Reminder Interval	Days ▼
Last Service Date		Internal Note	
Attachment	Choose file No file chosen		

Here you have the following fields:

- **Asset Code (SKU)** - This is the identification code for the asset.
- **Asset Name** - This is the identification name for the asset.
- **Customer Description** - This is the description of the asset that the customer sees.
- **Vendor Description** - This is the description of the asset that the vendor sees.
- **Type** - This is the type of the asset e.g. Engine, Pump, Gearbox etc.
- **Status** - This is the status of the asset e.g. Good Condition, Needs Repair etc.
- **Cost Centre** - This is the cost centre that the asset comes under.
- **Stores Location** - This is the location ID for where the asset is stored.
- **Service Interval** - This is the amount of recommended time between services.
- **Service Reminder Interval** - This is the amount of recommended time between service reminders being sent.

- **Last Service Date** - This is the date that the asset was last serviced.
- **Internal Note** - Here you can write anything related to the asset that other staff may need to know.
- **Attachment** - Here you can add any attachments related to the asset e.g. invoices, images etc.

When you click the 'Save' button, this asset will be added to the Asset Register.

If you need to change any details for the asset, clicking the 'View' button within the row will bring up the 'Edit Asset' dialog.

Asset Code (SKU)	Customer Description	Vendor Description	Cost Centre	Asset	Status	Actions			
1	test	test	1234	test asset	Good Condition				

You can also view the history of the asset using the 'View History' button, and delete the asset using the 'Delete Asset' button. This moves the asset into the 'Asset register archive' tab.

Creating a Repair

To start creating a repair for an asset, click the 'Create Repair' button within the row.

Asset Code (SKU)	Customer Description	Vendor Description	Cost Centre	Asset	Status	Actions
1	test	test	1234	test asset	Good Condition	   

This will generate the following pop-up dialog:

Asset Repair
×

SKU1

Customer Descriptiontest

Status*Awaiting Collection

Collection Date*

Notes

Due Date*

Cost

Customer Reference

AMS Reference

AttachmentChoose fileNo file chosen

Close

Save

Here you have the following fields:

- **Status** - This is the status of the asset while it's in repair.
- **Collection Date** - This is the date that the asset will be collected for repair.

- **Notes** - Here you can write anything related to the repair that other staff may need to know.
- **Due Date** - This is the date that the repair should be completed by.
- **Cost** - This is the cost of the repair.
- **Customer Reference** - This is the identification reference for the customer.
- **AMS Reference** - This is the identification reference for the repair.
- **Attachment** - Here you can add any attachments related to the repair e.g. invoices, images etc.

Tracking a Repair

When the repair has been created, it will be added to the Asset Tracker tab.

Asset Code (SKU)	Customer Description	Status	Collection Date	Notes	User	Due Date	Cost	Cust Ref	AMS Ref	Service Interval
1	test	Awaiting Repair	28/12/2017			31/12/2017				



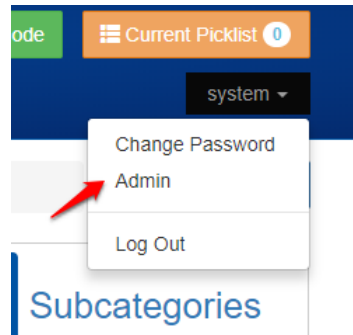
Clicking the 'View Repair' icon will allow you to edit the repair.

From here you can change the status to reflect the current state of the repair, e.g. Awaiting Delivery, Cannot be repaired etc.

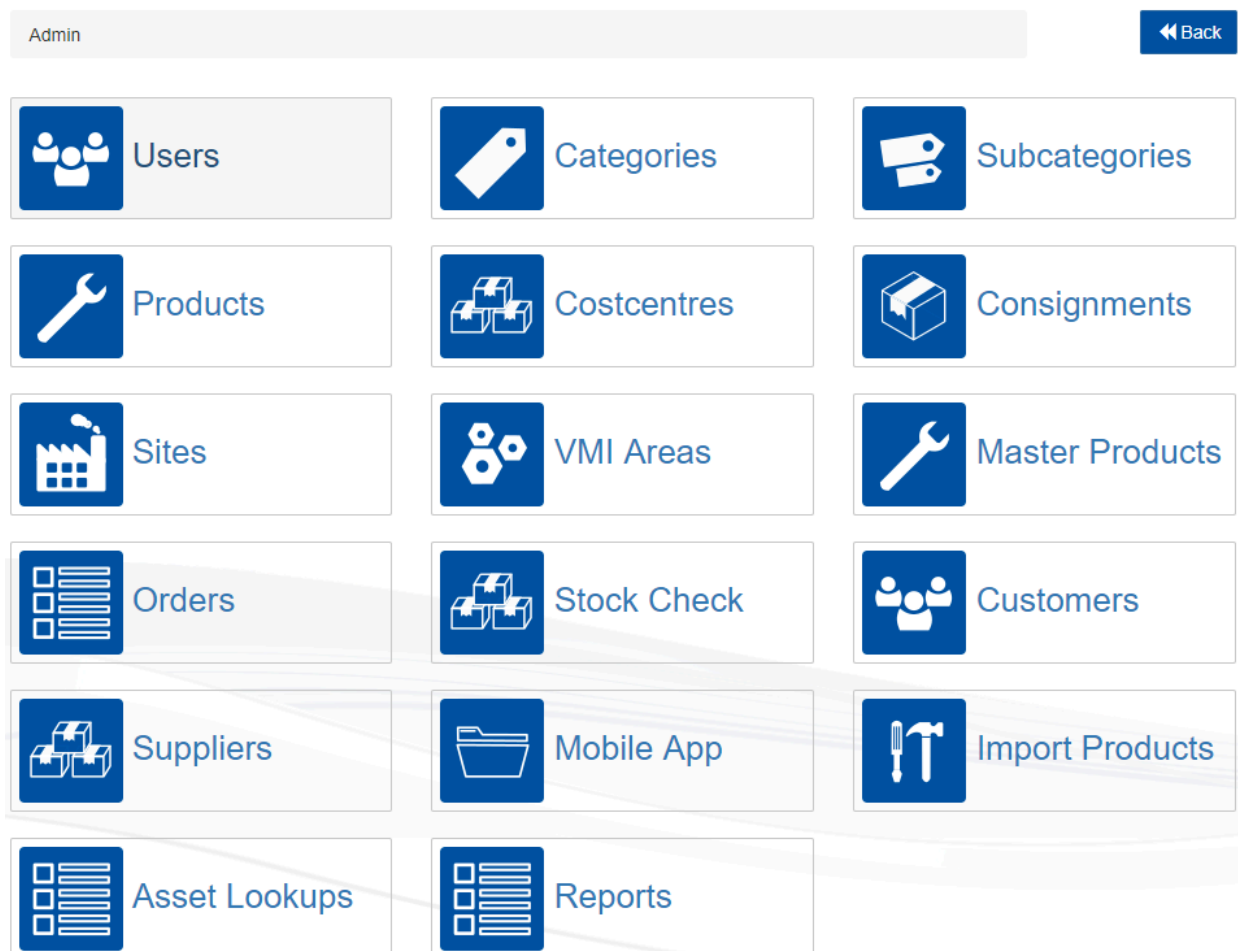
When the status is changed to one that marks the repair as complete, it will be moved into the 'History' tab.

The Admin Area

To access the Admin area of the system, click your username, then select Admin.



This will take you to the following screen:



Users

When you visit the 'Users' section, you'll see the following screen:

Admin /  Users
⬅ Back

+ Add User

Active
Deleted

Email	Forename	Surname	Edit	Permissions	Delete
one@hayley-group.co.uk			 Edit	 Permissions	 Delete
seb.atkins@hayley-group.co.uk			 Edit	 Permissions	 Delete
simon.pilkington@hayley-group.co.uk			 Edit	 Permissions	 Delete
mark.field2@aggregate.com			 Edit	 Permissions	 Delete

Here you can see a list of active users, with the options to add users, edit users, change a user's permissions and delete a user.

Clicking the 'Deleted' tab will show a list of users that have been deleted from the system. Here you have the ability to restore these users to make them active again.

Active
Deleted

Email	Forename	Surname	Restore
haza1968@msn.com			Restore

Adding a User

To add a user, click the 'Add User' button. This will generate the following pop-up dialog:

Add User

Details

Customers

Sites

Email address

Password

Confirm Password

Forename

Surname

Close

Add User

Here you have three tabs: 'Details', 'Customers' and 'Sites'.

Details

This is where you fill in the basic details for the new user:

- Email address
- Password
- Confirm Password
- Forename
- Surname

Customers

Add User ×

Details

Customers

Sites

Name	Has access
Test Customer	☐
Aggregate Industries Torr Works	☐
Amcov Ledbury	☐

From this tab you can select which Customers the user has access to. This will allow Customer Users and Customer Admins to switch between customers that they have access to, in much the same way that Admins are able to impersonate other customers.

Sites

Add User ×

Details

Customers

Sites

Aggregate Industries Torr Works	Has access
Main Stores	☐
PPE Stores	☐
PPE Stores 2	☐

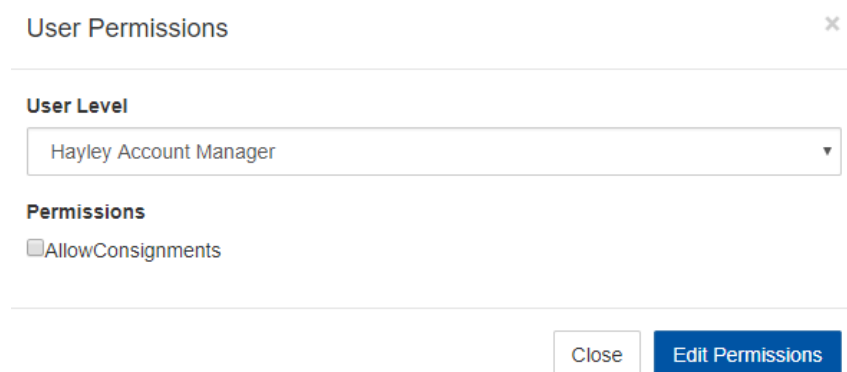
Close

Add User

From this tab you can select which Sites the user has access to, based on which Customers they have access to. This will allow Customer Users and Customer Admins to switch between sites that they have access to while accessing a customer.

Changing User Permissions

Clicking the 'Permissions' button for the user will generate the following pop-up dialog:



The image shows a 'User Permissions' pop-up dialog. At the top, it has a title bar 'User Permissions' with a close button 'x'. Below the title bar, there is a section 'User Level' containing a dropdown menu with 'Hayley Account Manager' selected. Below this is a section 'Permissions' with a checkbox labeled 'AllowConsignments'. At the bottom right, there are two buttons: 'Close' and 'Edit Permissions'.

Here you can select the user's permission level from the following options:

- Super User
- Hayley Admin
- Hayley Account Manager
- Customer Admin
- Customer User

You can find out more about these permission levels [here](#).

The 'AllowConsignments' button allows the user to access the consignments area.

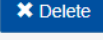
Categories

When you visit the 'Categories' section, you'll see the following screen:

Admin / Manage Categories
← Back

+ Add Category

Active
Deleted

Name	Icon	Edit	Delete
FLUID POWER		 Edit	 Delete
OEM		 Edit	 Delete
SEALS		 Edit	 Delete
MOTORS & BOXES		 Edit	 Delete
TOOLS		 Edit	 Delete

This will show a list of all active product categories that have been added to the system. Here you have the options to add a category, edit a category and delete a category. Clicking the 'Deleted' tab will show a list of categories that have been deleted from the system. Here you have the ability to restore these categories to make them active again.

Adding a Category

Clicking the 'Add Category' button will generate the following pop-up dialog:

Add Category

Name

Icon





















































Close

Add Category

Here you can enter the name for the category and choose a suitable icon.

Subcategories

When you visit the 'Subcategories' section, you'll see the following screen:

Admin / Manage Subcategories
Back

Select Category: Choose category:

+ Add Subcategory

Active Deleted

Name	Edit	Move products	Delete
PIPE FITTINGS	Edit	→ Move products	✕ Delete
PROCESS VALVES	Edit	→ Move products	✕ Delete
PROCESS HOSE	Edit	→ Move products	✕ Delete
OEM SPARES	Edit	→ Move products	✕ Delete
OIL SEALS	Edit	→ Move products	✕ Delete
GEARBOX	Edit	→ Move products	✕ Delete
WELDING / ACCESSORY	Edit	→ Move products	✕ Delete
EYE PROTECTION	Edit	→ Move products	✕ Delete

This will show a list of all active subcategories in the system. You have the option to narrow down this list using the select category drop-down, which is a list of the main categories.

Admin / Manage Subcategories

Select Category: Choose category:

+ Add Subcategory

Active Deleted

Name	Edit	Move products	Delete
PIPE FITTING			
PROCESS VALVES			

Choose category:
Choose category:
FLUID POWER
OEM
SEALS
MOTORS & BOXES
TOOLS
PPE
TRANSMISSION
BEARINGS
FASTENERS
ELECTRICAL
CONSUMABLES
INDUSTRIAL
DRIVES

From here you can add a subcategory, edit a subcategory, move products and delete a subcategory.

Clicking the 'Deleted' tab will show a list of subcategories that have been deleted from the system. Here you have the ability to restore these subcategories to make them active again.

Adding a Subcategory

Clicking the 'Add Subcategory' button will generate the following pop-up dialog:

Add Subcategory

Name

Choose category:

Close

Add Subcategory

Here you can enter a name for the subcategory and, from the drop-down, choose which main category it comes under.

Moving Products

If you need to move products from one subcategory to another, you can use the 'Move products' button. Clicking this will generate the following pop-up dialog:

Move Products

Use this form to move all products in the PIPE FITTINGS sub category into a different one.

Choose category:

Choose subcategory:

Close

Move Product

Using the drop-down lists, you can select which main category and which subcategory you want to move the products to.

Products

When you visit the 'Products' section, you'll see the following screen:

[Admin](#) / [Manage Products](#)
⬅ Back

Select Category: Choose category: ▼
 Select Subcategory: Choose subcategory: ▼
 Show: All ▼

Active Deleted

Part Number	Location	Name	Edit	Delete
AI000606	F5C4	01C3EX Cooper Triple Labyrinth Housing	 Edit	 Delete
AI003033	PC2C2	Air Cylinders	 Edit	 Delete
AI002978	PB5C1	Allis Bearing Kit	 Edit	 Delete
AI002958	PB3C2	Allis Chalmer Bearing Housing x 2 S1,S2 & S3 Screen	 Edit	 Delete
AI002982	PB5D3	Allis P Screen Inner Compression Springs	 Edit	 Delete
AI003007	PC2D2	Bush SandVik Cone	 Edit	 Delete
AI002995	PB6C1	Crusher Track Idler Wheel (CAT)	 Edit	 Delete

This will show a list of all active products in the system. From here you can edit the product or delete the product.

Clicking the 'Deleted' tab will show a list of products that have been deleted from the system.

Here you have the ability to restore these products to make them active again.

Using the drop-downs above the product list, you can narrow your search by category, subcategory, and whether or not they have a base product.

Editing a Product

To edit a product's details, click the 'Edit' button. This will generate the following pop-up dialog:

Edit Product
×

Description

Part Number AI000606	Bin Location F5C4	Pack Unit 1
Mas Number 40002091	Supplier Hayley Group Ltd	Stock Target Packs 1
SXE Code SXE Code	Category BEARINGS	Stock Target Units 1
Present Stock 59	Subcategory COOPER BEARIN	Reorder Point (Units) 1
Customer Price 0.01	Criticality Choose criticality	Max Order Quantity Max Order Quantity

Here you have the following fields:

- **Description** - This is the description for the product that will appear in product lists throughout the site.
- **Part Number** - This is the identification number for the product.
- **Bin Location** - This is the location of the bin where the product is stored.
- **Pack Unit** - This is the amount of each product within a pack.
- **Mas Number** - This is the master data number for the product. This matches the product to its base product within the MasData database.
- **Supplier** - This is the name of the company supplying the product. More information about adding suppliers can be found [here](#).
- **Stock Target Packs** - This is the number of packs of the product that the warehouse should aim to have at any one time.

- **SXE Code** - This is the product code that gets sent to SXE when an order is placed. National accounts will normally get the SXE numbers from the masdata database. Rail accounts will normally enter their own data into this field.
- **Category** - This is the main category that the product comes under.
- **Stock Target Units** - This is the number of units of the product that the warehouse should aim to have at any one time. This is automatically calculated using *pack unit * stock target packs*
- **Present Stock** - This is the number of each product that is in stock. This number is affected by picklists and consignments.
- **Subcategory** - This is the subcategory that the product comes under.
- **Reorder Point (Units)** - This is the number of units of the product at which the product should be reordered. When the number is reached, the system will suggest that this is ordered when you visit the Orders section.
- **Customer Price** - This is the amount that the customer will pay for the product. This is just for information.
- **Criticality** - This is the importance of the product, on a scale from 1 - 5.
- **Max Order Quantity** - This is the maximum amount of the product that can be ordered at any one time.

Costcentres

When you visit the 'Costcentres' section, you'll see the following screen:

Admin / Manage Costcentres Back

+ Add Costcentre

Active Deleted

Name	Identifier		
123	123	Edit	Delete
cost	cost	Edit	Delete
Demo Guide	Demo Guide	Edit	Delete
Test	Test	Edit	Delete

+ Add Costcentre

Here you can see the 'Name' and 'Identifier' of the Costcentre. You also have the options to add a Costcentre, edit a Costcentre or delete a Costcentre.

Using the 'Deleted' tab, you can see any previously deleted Costcentres, and have the option to restore the Costcentre to make them active again:

Admin / Manage Costcentres Back

+ Add Costcentre

Active Deleted

Name	Identifier	Restore
151	151	Restore
1805030	1805030	Restore
33	33	Restore

Adding a Costcentre

Clicking the 'Add Costcentre' button will generate the following pop-up dialog:

Add Costcentre

Name

Identifier

Close

Add Costcentre

Here you can enter the 'Name' and the 'Identifier' of the Costcentre.

Consignments

When you visit the 'Consignments' section, you'll see the same screen as when you view previous consignments from the consignments area. You can find out more about this [here](#).

Sites

When you visit the 'Sites' section, you'll see the following screen:

[Admin](#) / [Sites](#)

[Back](#)

[+ Add site](#)

[Active](#) [Deleted](#)

Name		
Main Stores	Edit	Delete
PPE Stores	Edit	Delete
PPE Stores 2	Edit	Delete

This is a list of all active sites for the customer. From here you can add a site, edit the site or delete the site.

Clicking the 'Deleted' tab will show a list of sites that have been deleted from the system. Here you have the ability to restore these sites to make them active again.

Adding a Site

Clicking the 'Add site' button will generate the following pop-up dialog:

Add site

Details

Modes

Users

Shipping

Name

Name

Warehouse Id

Warehouse Id

Default to Max Quantity

☐

Require Cost Centre when submitting Pick Lists?

☐

Close

Add site

From here you have four tabs: 'Details', 'Modes', 'Users' and 'Shipping'.

Details

Within this tab you can enter some basic details about the site.

Here you have the following fields:

- **Name** - This is the name of the site. This appears in the site list within the header of the page.
- **Warehouse Id** - This is the id for the warehouse within the site.

- **Default to Max Quantity** - Check this box if you want all the products in the site to default to their max quantity when you first create the site.
- **Require Cost Centre when submitting Pick Lists?** - Check this box if you want the cost centre to be mandatory when you're creating picklists for the site.

Modes

Add site
×

Details
Modes
Users
Shipping

Mode
Choose mode...

Picklist mode ☐

Consignment mode ☐

Order mode ☐

Close
Add site

Here you have the following fields:

- **Mode** - Here you can choose the type of site from National Accounts, Rail or AMS.
- **Picklist mode** - Check this box if you want the site to be enabled for picklists.
- **Consignment mode** - Check this box if you want the site to be enabled for consignments.
- **Order mode** - Check this box if you want the site to be enabled for orders.

Users

Add site ×

Details

Modes

Users

Shipping

Select all users ☒

Name	Has access
one@hayley-group.co.uk	☒
seb.atkins@hayley-group.co.uk	☒
stocktake@hayley-group.co.uk	☒
john.hopcroft@hayley-group.co.uk	☒

From here you have the following options:

- **Select all users** - Check this box if you want the site to be accessible to all users.
- Check boxes next to individual users to give them access to the site.

Shipping

Add site

×

Details

Modes

Users

Shipping

Ship To

Recipient

Address Line 1

Address Line 2

Town

County

Postcode

Telephone

Close

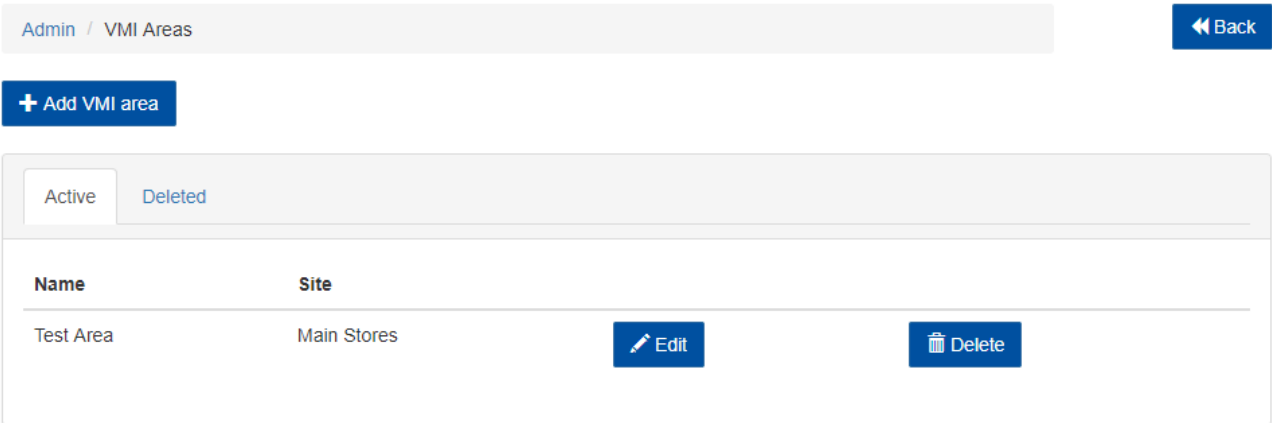
Add site

Here you can add the shipping address for the site.

VMI Areas (Rail Only)

If the site you're currently accessing is a rail site, you'll have access to the 'VMI Areas' section.

When you visit the 'VMI Areas' section, you'll see the following screen:



The screenshot shows the 'VMI Areas' section of the ATLAS interface. At the top, there is a breadcrumb trail 'Admin / VMI Areas' and a 'Back' button. Below this is a '+ Add VMI area' button. The main content area has two tabs: 'Active' (selected) and 'Deleted'. Under the 'Active' tab, there is a table with two columns: 'Name' and 'Site'. The table contains one row with 'Test Area' and 'Main Stores'. To the right of this row are two buttons: 'Edit' and 'Delete'.

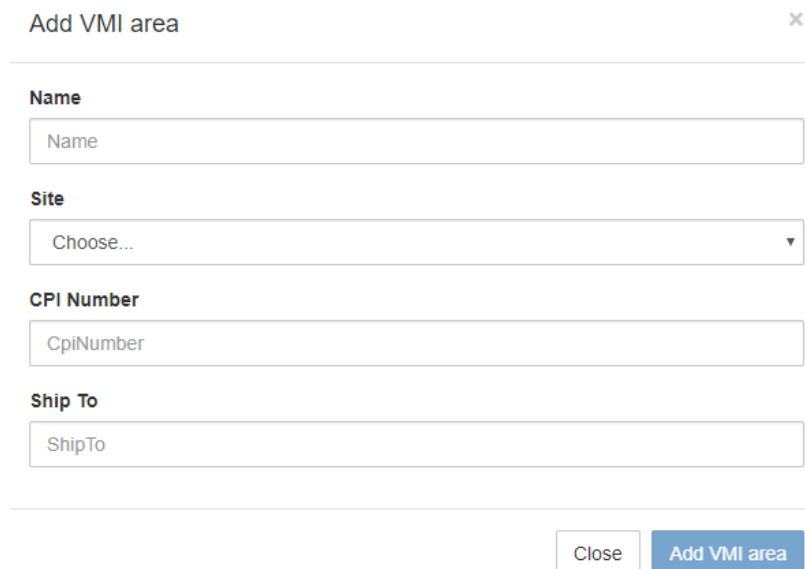
Name	Site		
Test Area	Main Stores	Edit	Delete

This is a list of all active VMI Areas, and their site, for the customer. From here you can add an area, edit the area or delete the area.

Clicking the 'Deleted' tab will show a list of areas that have been deleted from the system. Here you have the ability to restore these areas to make them active again.

Adding a VMI Area

Clicking the 'Add VMI area' button will generate the following pop-up dialog:



The screenshot shows the 'Add VMI area' pop-up dialog. It has a title bar with 'Add VMI area' and a close button. The form contains four fields: 'Name' (text input), 'Site' (dropdown menu), 'CPI Number' (text input), and 'Ship To' (text input). At the bottom right, there are two buttons: 'Close' and 'Add VMI area'.

Add VMI area [X]

Name
Name

Site
Choose...

CPI Number
CpiNumber

Ship To
ShipTo

[Close] [Add VMI area]

Here you have the following fields:

- **Name** - This is the name of the area.
- **Site** - Here you can choose the site that the area comes under. This is a drop-down list of all sites for the customer.
- **CPI Number** - This is printed on a location barcode within the area, e.g. on the door to the warehouse or on a rack. Scanning this will tell the system that you're in this area.
- **Ship To** - This is the code for the area that is used as a reference for where to ship orders to.

Master Products

When you visit the 'Master Products' section, you'll see the following screen:

Admin / Manage Products
Back

Search:

0 products selected

☐	MAS Number	Description
☐	40002219	9A86.03.21X0.99 LEGRIS COUPLING
☐	40996329	Dewalt Apprentice Size 10 (44) Brown Nubuck Hiker Boot
☐	40996336	Dewalt Apprentice Size 10 (44) Wheat Nubuck Hiker Boot
☐	40996330	Dewalt Apprentice Size 11 (46) Brown Nubuck Hiker Boot
☐	40996337	Dewalt Apprentice Size 11 (46) Wheat Nubuck Hiker Boot
☐	40996331	Dewalt Apprentice Size 12 (47) Brown Nubuck Hiker Boot
☐	40996338	Dewalt Apprentice Size 12 (47) Wheat Nubuck Hiker Boot
☐	40996339	Dewalt Apprentice Size 3 (36) Wheat Nubuck Hiker Boot
☐	40996340	Dewalt Apprentice Size 4 (37) Wheat Nubuck Hiker Boot
☐	40996341	Dewalt Apprentice Size 5 (38) Wheat Nubuck Hiker Boot

This is a list of all the products within the MasData database.

From here you're able to search for specific products within the database, and select them to add to a site. You're not able to edit or delete these products.

Checking the box next to a product will generate the following fields beneath the list:

Category: BEARINGS ▾
Subcategory: ANGULAR C ▾
Supplier: Hayley Group ▾

Add products to site

This lets you select the category, subcategory and supplier of the product, then add it to the site.

Orders

This section is where you will create orders. To find out more about this, click [here](#).

Stock Check

When you visit the 'Stock Check' section, you'll see the following screen:

Admin / Stock check
Back

+ Create stock check

Active
History

Date of stock check	Started by	Number of products	
15/12/2017	system	50	Complete
15/12/2017	system	10	Complete
15/12/2017	system	50	Complete
27/11/2017	mark.harrison@hayley-group.co.uk	20	Complete
27/11/2017	mark.harrison@hayley-group.co.uk	20	Complete

Here you can see a list of stock checks that haven't been completed yet.

Creating a Stock Check

Clicking the 'Create stock check' button will generate the following pop-up dialog:

Add Stock Check
×

Which type of stock check would you like to perform?

Standard
By Bin

Show expected stock levels column ☒

Close

Add Stock Check

Here you have the option to create a 'Standard' stock check, or a stock check 'By Bin'.
 Use the 'Show expected stock levels column' checkbox if you'd like your stock check to include an extra column showing the stock levels the system expects there to be.

Standard

To start a standard stock check, click the 'Standard' button.

This will change the pop-up to the following:

Add Stock Check
×

Enter below the number of products you want to stock check for the current site.

Number of products

Back
Close
Add Stock Check

Here you enter the number of products you wish to stock check.

Clicking the 'Add Stock Check' button will then generate the following screen:

Admin / Stock check / 28/12/2017
← Back

Created date: 28/12/2017

Created by: system

Product Name

Product name...

Clear

Print
Complete stock check

Product	Expected	Actual	Bin Location
Washplant Gearbox Seal Simrit 0000451053 100X200X13/12 Nitrile Seal	3	3	A6C1
Atlas Copco Filter AZL013	1	1	D5A3
3X2.25X0.5 R4 Nitrile(225 X 300 X 50 R4 - Nitrile)	3	3	I1A1A
75X90X10R21 Nitrile 70 Shore	3	3	I1B4C
Flowtech 0123.13.21 (GT21/13KNP) Hosetail Adapter 13MM (1/2") X 1/2" BSPT	1	1	I5G4B

This shows you a list of products to stock check based on what the system has calculated you need to check.

Within this screen, the notable features are:

- **Search** - You can use this field to search for a specific product within the stock check.
- **Print** - Clicking this will allow you to print the stock check.
- **Actual** - Here you enter the number of products you've counted when doing the check. This can be different to the expected number.
- **Complete stock check** - Clicking this will complete the stock check and enter it into the system.

Note: The 'Expected' column will only be shown if the checkbox was ticked when creating the stock check.

By Bin

To start a stock check by bin location, click the 'By Bin' button.

This will change the pop-up to the following:

Add Stock Check

Find products by bin

Search

Search

Selected Bins

No results

Back

Close

Add Stock Check

Using the 'Search' field, you can search for a specific bin, either using its full ID or a partial one.

After searching for a bin, the pop-up will look like the following:

Add Stock Check
×

Find products by bin

Search

Search

Selected Bins

☐	Bin
☐	B2A1

« 1 »

Showing results 1-1 of 1

Back

Close

Add Stock Check

Here you can use the checkbox next to the bin location to select it and add it to the stock check. You're able to check multiple bins from multiple searches. For example, if you check B2A1, this will be added to the 'Selected Bins' tab. You can then search again for A1A1 and check this. Clicking the 'Selected Bins' tab will show you which bins you've already selected, and remove them if necessary:

Add Stock Check
×

Find products by bin

Search

Search

Selected Bins

Bin
☒ B2A1
☒ A1A1

Back

Close

Add Stock Check

Clicking the 'Add Stock Check' button will then generate the following screen:

Admin / Stock check / 28/12/2017

Created date: 28/12/2017

Created by: system

Product Name

Product	Expected	Actual	Bin Location
18820	21	21	A1A3
SKF Bearing Housing SNL520-617	1	1	A1B1

This shows a list of all products within the selected bins that need stock checking.

Within this screen, the notable features are:

- **Search** - You can use this field to search for a specific product within the stock check.
- **Print** - Clicking this will allow you to print the stock check.
- **Actual** - Here you enter the number of products you've counted when doing the check. This can be different to the expected number.
- **Complete stock check** - Clicking this will complete the stock check and enter it into the system.

Note: The 'Expected' column will only be shown if the checkbox was ticked when creating the stock check.

Completing an Incomplete Stock Check

When you first visit the 'Stock Check' section, you'll see a list of incomplete stock checks.

Clicking the 'Complete' button next to each stock check will take you to the screen where you can enter all the counted stock and complete the check.

Viewing Previous Stock Checks

When you first visit the 'Stock Check' section, you'll see two tabs: 'Active' and 'History'. Clicking the 'History' tab will generate the following screen:

Admin / Stock check

Back

+ Create stock check

ActiveHistory

Date of stock check	Completed date	Started by	Number of products	
15/12/2017	15/12/2017	system	1	View
08/12/2017	08/12/2017	system	2	View
08/12/2017	08/12/2017	system	40	View
15/11/2017	15/11/2017	system	50	View
16/10/2017	16/10/2017	wayne.wilkes@hayley-group.co.uk	17	View

This shows a list of all previously completed stock checks.

Clicking the 'View' button will generate the following screen:

Admin / Stock check / 15/12/2017 Back

Created date: 15/12/2017 Print

Completed date: 15/12/2017

Created by: system

Product Name Clear

Product	Expected	Actual	Bin Location
Powerscreen Chain	3	3	A1A1

This shows the details of the stock check and allows you to print a copy of the check.

Customers

When you visit the 'Customers' section, you'll see the following screen:

[Admin](#) / [Customers](#)

◀ Back

+ Add customer

Active Deleted

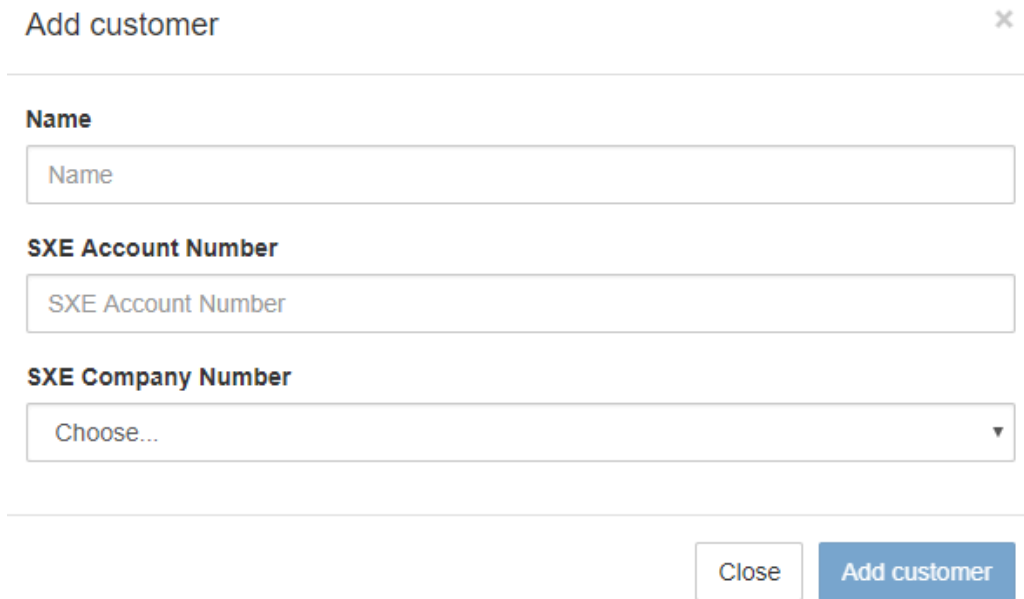
Name			
Test Customer	 Edit	 Impersonate	 Delete
Aggregate Industries Torr Works	 Edit	 Impersonate	 Delete
Amcor Ledbury	 Edit	 Impersonate	 Delete
Cemex Rugby VMI	 Edit	 Impersonate	 Delete
Hayley Rail Demo	 Edit	 Impersonate	 Delete

This is a list of all active customers on the system. From here you can add a customer, edit the customer, impersonate the customer or delete the customer.

Clicking the 'Deleted' tab will show a list of customers that have been deleted from the system. Here you have the ability to restore these customers to make them active again.

Adding a Customer

Clicking the 'Add Customer' button will generate the following pop-up dialog:



The dialog is titled "Add customer" with a close button (X) in the top right corner. It contains three input fields: "Name", "SXE Account Number", and "SXE Company Number". The "SXE Company Number" field is a dropdown menu with "Choose..." selected. At the bottom right, there are two buttons: "Close" and "Add customer".

Here you can enter the 'Name', the 'SXE Account Number' and the 'SXE Company Number' for the new customer.

Impersonating a Customer

Clicking the 'Impersonate' button allows you to view the system as if you were logged in as that specific customer. This has the same effect as when you select a different customer from the customer drop-down in the header.

While you're impersonating, you'll see the following at the top of your screen:



The status bar is orange and contains the text "You are currently impersonating Aggregate Industries Torr Works" followed by a red button labeled "Stop Impersonating".

Clicking the 'Stop Impersonating' button will restore your view of the system.

Suppliers

When you visit the 'Suppliers' section, you'll see the following screen:

Admin / Manage Suppliers
Back

+ Add Supplier

Active Deleted

Name	Email	Edit	Delete
Hayley Group Ltd		 Edit	 Delete
Hayley Group Ltd	southwest@hayley-group.co.uk	 Edit	 Delete
OEM supplier	mark.harrison@hayley-group.co.uk	 Edit	 Delete

This is a list of all active suppliers on the system. From here you can add a supplier, edit the supplier, impersonate the supplier or delete the supplier.

Clicking the 'Deleted' tab will show a list of suppliers that have been deleted from the system. Here you have the ability to restore these suppliers to make them active again.

Adding a Supplier

Clicking the 'Add Supplier' button will generate the following pop-up dialog:

Add Supplier

Name

Email Address

☐ Is this the Hayley supplier? (checking this box will send orders to SXE)

Close Add Supplier

Here you can enter the name and email address of the supplier.

Checking the 'Is this the Hayley supplier?' checkbox will tell the system to send all orders to SXE. If this isn't checked, an order email will be sent to the email address provided for the supplier.

Clicking the 'Add Supplier' button will then add the supplier to the system, and take you back to the supplier list.

Mobile App

When you visit the 'Mobile App' section, you'll see the following screen:

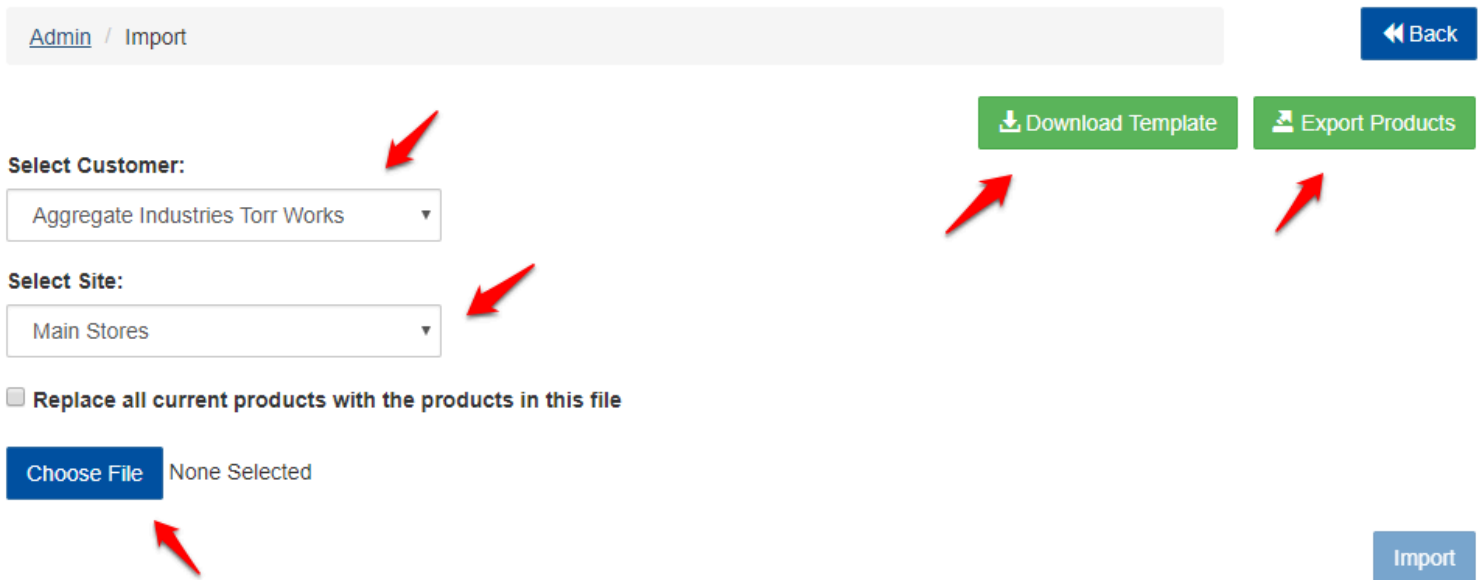
Home /  Mobile		← Back
Platform	Download	
Android	Test	

From here you can download the .apk for the mobile app by clicking the 'Test' link. This can then be transferred and installed on your Android device.

You can find out more about how to use the mobile app [here](#).

Import

When you visit the 'Import' section, you'll see the following screen:



The screenshot shows the 'Import' section of the ATLAS software. At the top left is a breadcrumb trail 'Admin / Import'. At the top right is a blue 'Back' button. Below the breadcrumb are two green buttons: 'Download Template' and 'Export Products'. On the left side, there are two dropdown menus: 'Select Customer:' with 'Aggregate Industries Torr Works' selected, and 'Select Site:' with 'Main Stores' selected. Below these is a checkbox labeled 'Replace all current products with the products in this file'. At the bottom left is a blue 'Choose File' button next to the text 'None Selected'. At the bottom right is a blue 'Import' button. Red arrows point to the 'Select Customer' dropdown, the 'Select Site' dropdown, the 'Download Template' button, the 'Export Products' button, and the 'Choose File' button.

Within this screen, the notable features are:

- **Download Template** - Use this button to download a .xlsx template of the import that you can add your products to.
- **Export Products** - Use this button to export a list of current products for the selected customer and site.
- **Select Customer** - Use this dropdown list to select the customer you wish to import products for.
- **Select Site** - Use this dropdown list to select the site you wish to import products for.
- **Replace all current products with the products in this file** - Check this box if you wish to overwrite all current products for the site with the ones in the file. If this is unchecked, the products in the file will be added in addition to the ones already in the system, or updated if there's an existing product ID.
- **Choose File** - Use this button to open the file explorer and search for your import file to upload.

Clicking 'Import' will then import your products to the selected customer and site. If there are any errors, these will be explained to you to rectify before continuing with the import.

Asset Lookups (AMS Only)

When you visit the 'Asset Lookups' section, you'll see the following screen:

[Create Status](#)

Asset Statuses

Name	Type		
Needs Repair	Asset	Edit	Delete
Awaiting Collection	Repair	Edit	Delete
Good Condition	Asset	Edit	Delete
Awaiting Repair	Repair	Edit	Delete
Awaiting Delivery to Client	Repair	Edit	Delete
Delivery Complete	Repair	Edit	Delete
End of life	Asset	Edit	Delete
Cannot be repaired	Repair	Edit	Delete

[Create Type](#)

Asset Types

Name		
Engine	Edit	Delete
Pump	Edit	Delete
Gearbox	Edit	Delete

This shows a list of all 'Asset Statuses' and 'Asset Types'.

Asset Statuses

Within the Asset Status section, you can see any statuses that have been created for either an asset or repair. These correspond to the statuses you can change assets and repairs to within the AMS Asset Tracker.

From here you can create a status, edit a status and delete a status.

Creating a Status

To start creating a status, click the 'Create Status' button:

Asset Statuses



This will generate the following pop-up dialog:

Asset Status ×

Name

Type

Asset ▼

Close

Save Asset Status

Here you have the following fields:

- **Name** - This is the name of the status that will appear when you select a status for an asset or repair.
- **Type** - Here you can choose from 'Asset' or 'Repair'. Choose 'Asset' if you want the status to be applicable to the asset as a whole. Choose 'Repair' if you want the status to be applicable only to asset repairs.

- **Should selecting this status mark the repair as complete?** - If you choose 'Repair' in the type, you'll then see this checkbox. Checking this means that changing a repair to this status will mark the repair as complete and moving it to the repair history.

Asset Types

Within the 'Asset Types' section you can see the names of types of assets that have been created. These correspond to the asset type you can select when creating an asset within the AMS Asset Tracker.

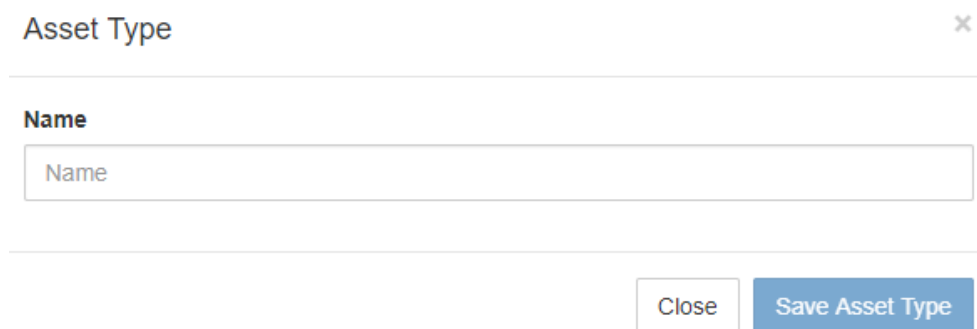
From here you can create a type, edit a type and delete a type.

Creating a Type

To start creating a type, click the 'Create Type' button:



This will generate the following pop-up dialog:

A screenshot of a pop-up dialog titled 'Asset Type' with a close button (x) in the top right corner. Inside the dialog, there is a section labeled 'Name' with a text input field containing the placeholder text 'Name'. At the bottom right of the dialog, there are two buttons: 'Close' and 'Save Asset Type'.

Here you're able to enter the name of the new asset type.

Reports

This section is where you can build reports on data within the system. To find out more about how to use this, click [here](#).

Appendix

Permissions

For information about what each permission level gives you access to, please see the below.

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Hayley User levels + associated permissions:

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- 5. SuperUser (access to everything)
- 4. Hayley Admin
- 3. Hayley Account Manager
- 2. Customer Admin
- 1. Customer

=====

Admin Page:

=====

UserLevel >= 3 = Customers option

UserLevel > 3 = Sites option

UserLevel >= 3 = Suppliers option

UserLevel >= 3 = Import products option

UserLevel >= 4 = Asset lookups

UserLevel >= 2 = Report builder

UserLevel >= 2 = User management (however you can't see any users with higher permissions than yourself)

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Edit Product dialog:

=====

UserLevel < 4 = cannot edit customer part number

UserLevel >= 4 = can edit product price

=====

View Picklist:

=====

UserLevel = 5 = can delete picklist

=====

Header

=====

UserLevel = 3 = gets list of customers on top bar so you can impersonate them, however there's no permission to view sites

UserLevel >= 4 = can impersonate all sites

=====

Categories

=====

UserLevel >= 2 = can view deleted categories/subcategories

UserLevel >= 2 = can delete/restore categories/subcategories

