Hayley Smarttime Admin User Guide

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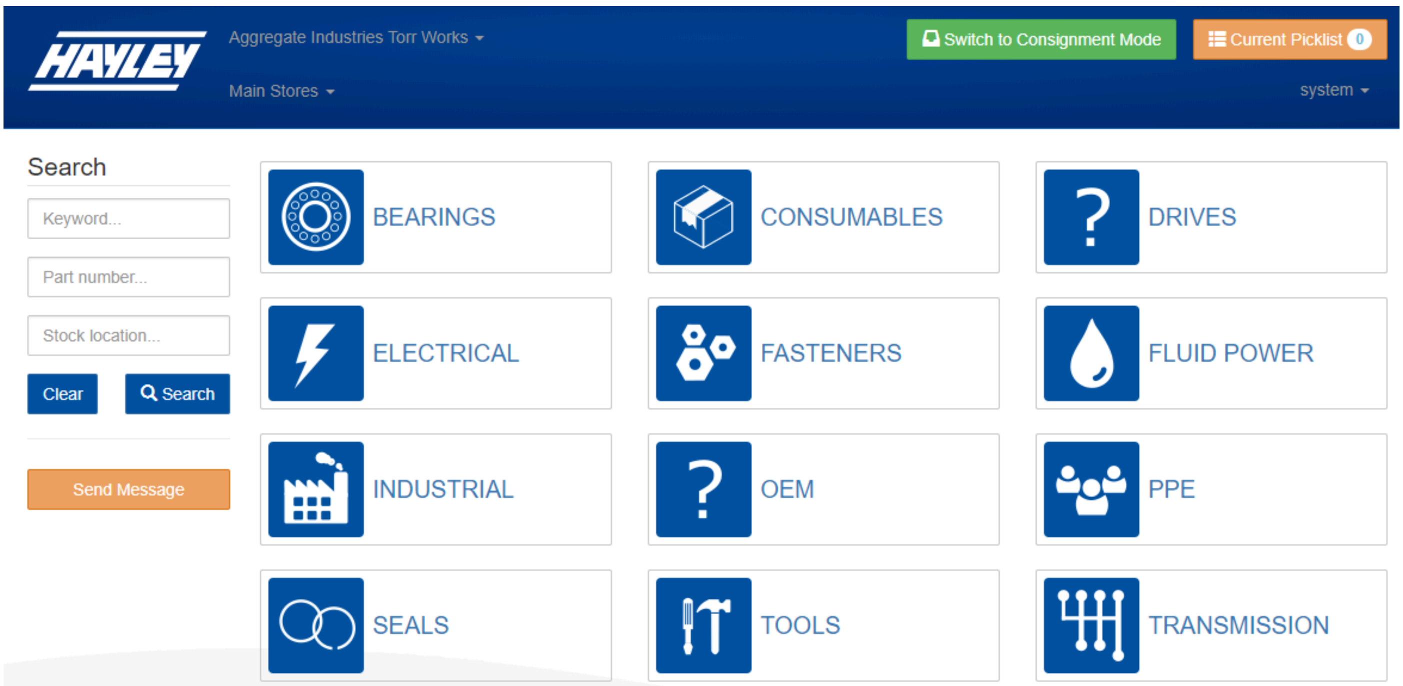
National Accounts and Rail

The Home Screen

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



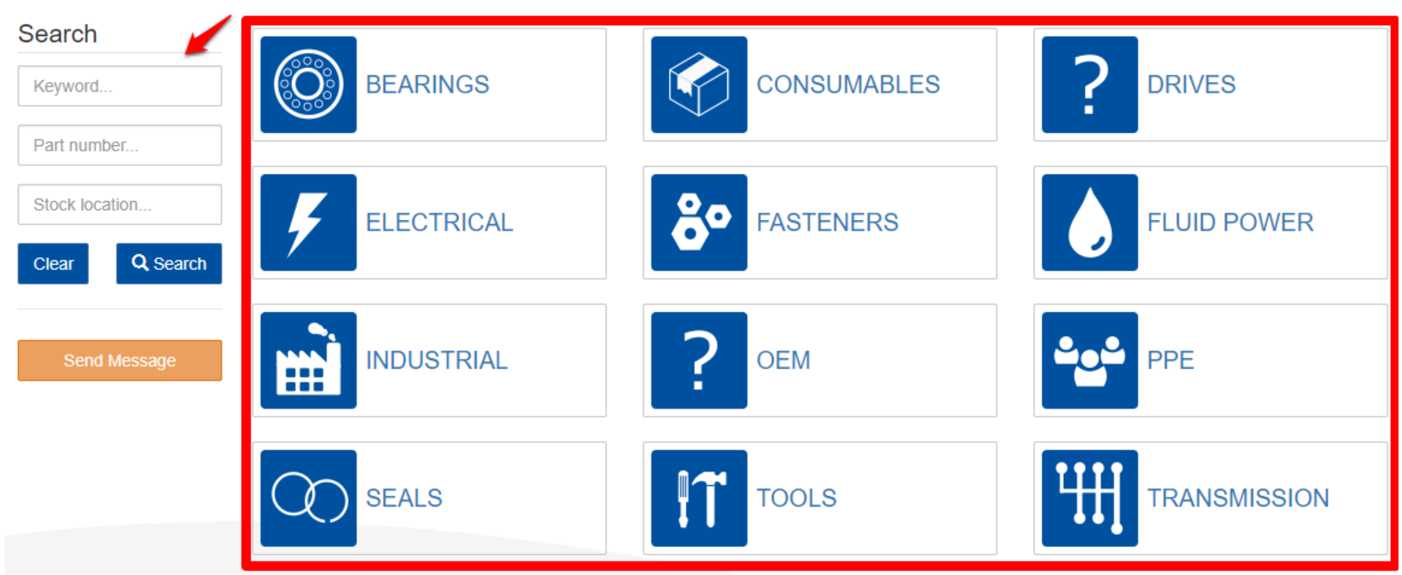
Within this screen, there are three main sections: the header, the search facility and the category listing.

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

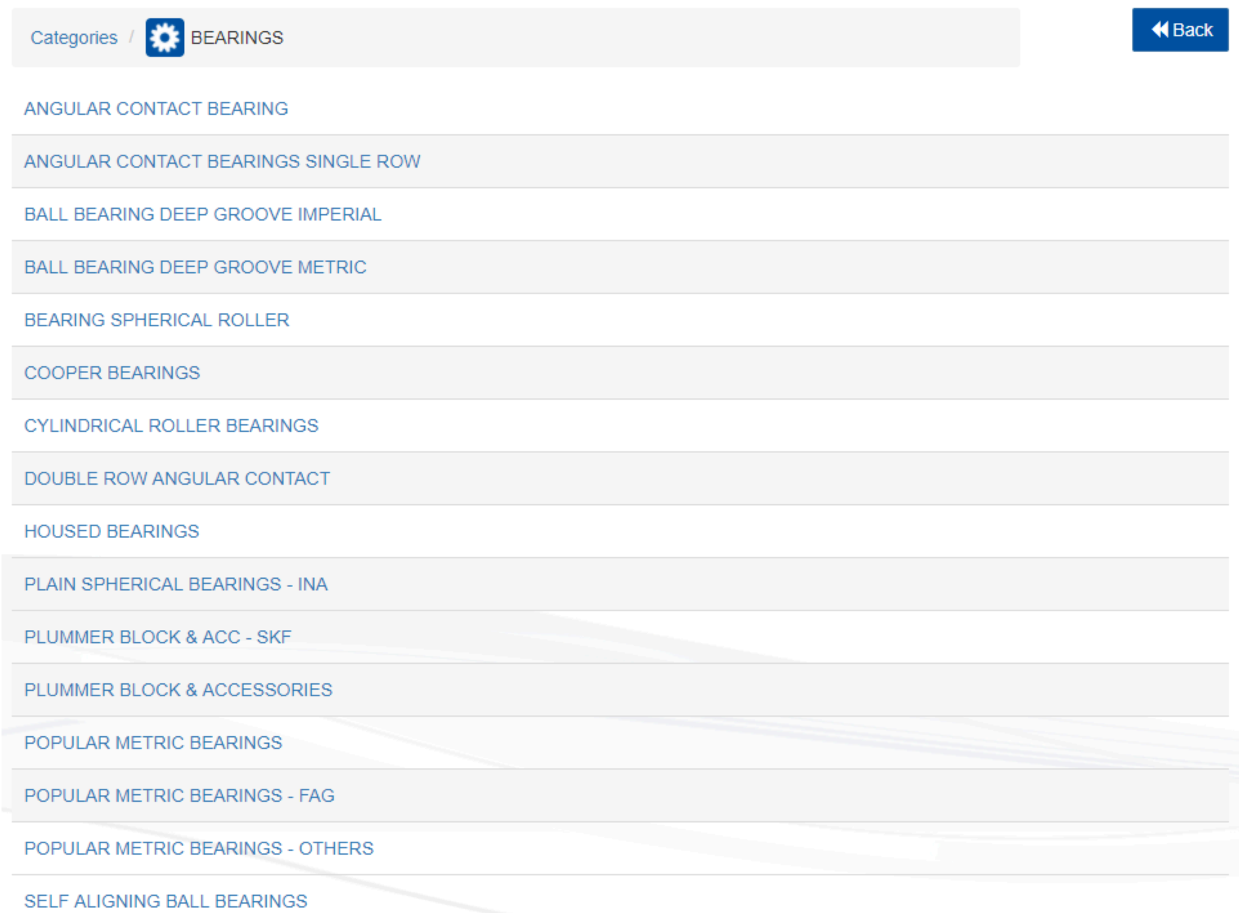
You have two ways to find a product to add to a picklist:

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

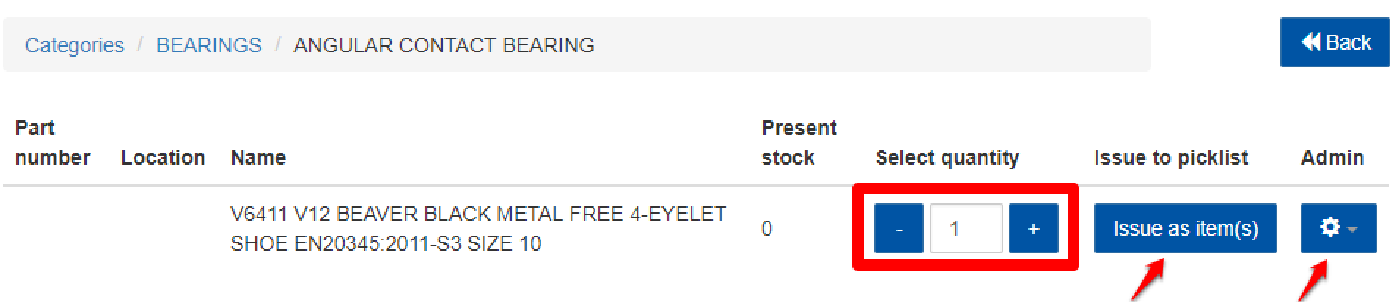
To use the Search facility, enter your search terms into the relevant field and click Search. This will generate the following screen:

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:



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

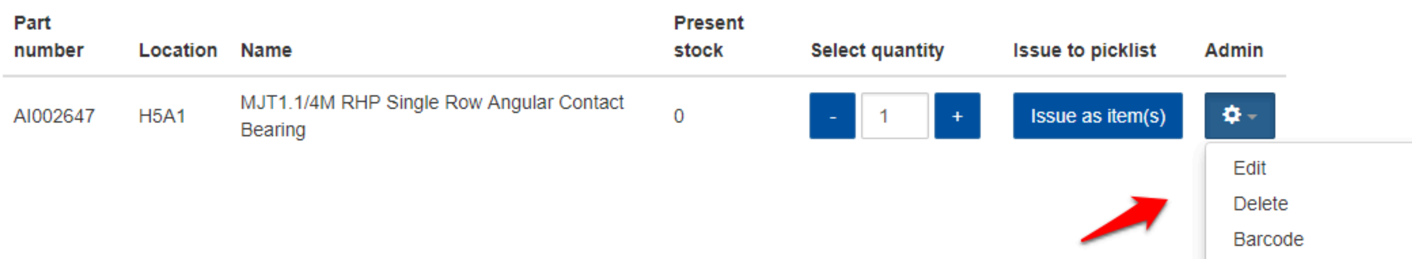


This is a list of all products that are in the selected subcategory. This is the same screen as when you search for a specific product.

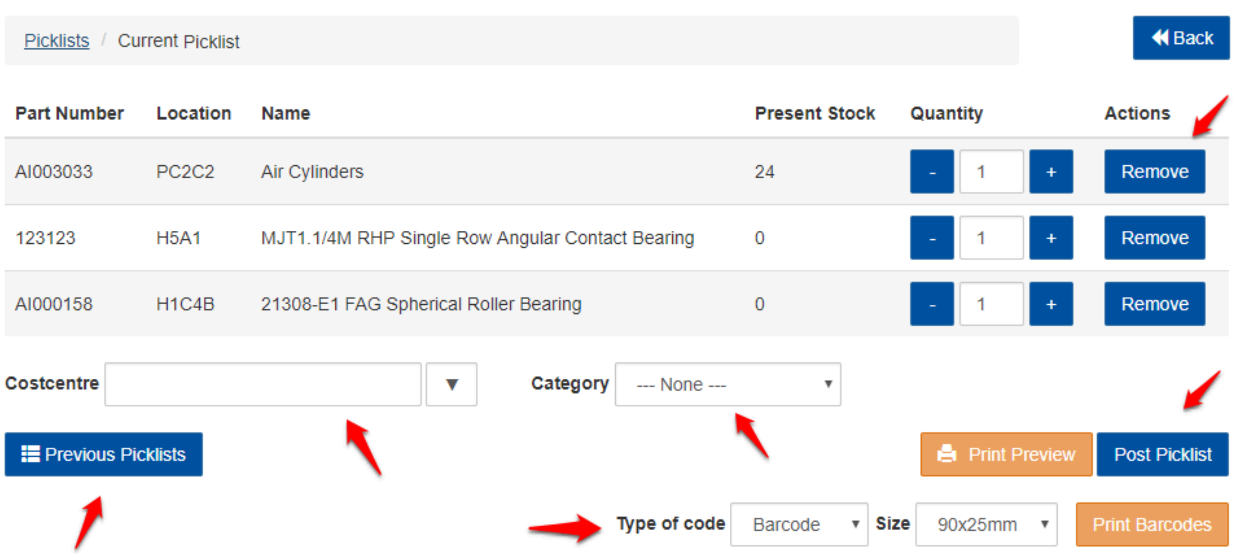
Note: When viewing a Rail customer, there are VMI Areas as opposed to Categories. You navigate through this by Area - Bay - Rack - Shelf - Bin.

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.



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.



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

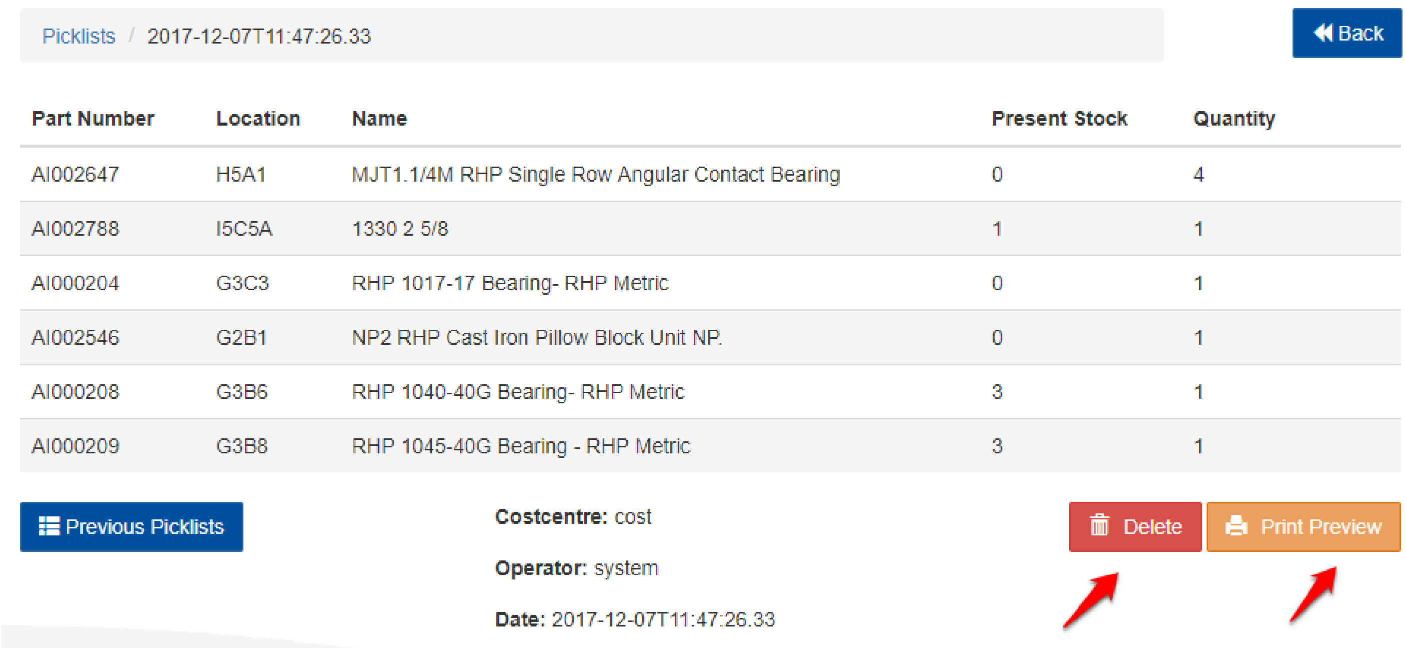
Clicking the 'Previous Picklists' button takes you to the following page:

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

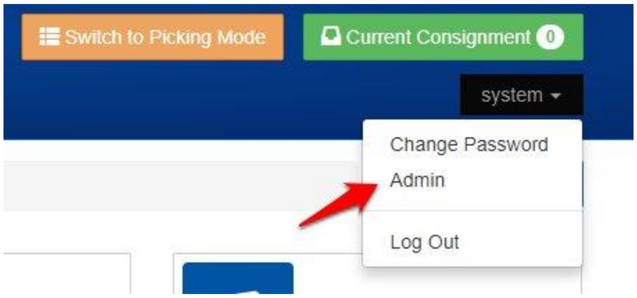
Delete

Print Preview

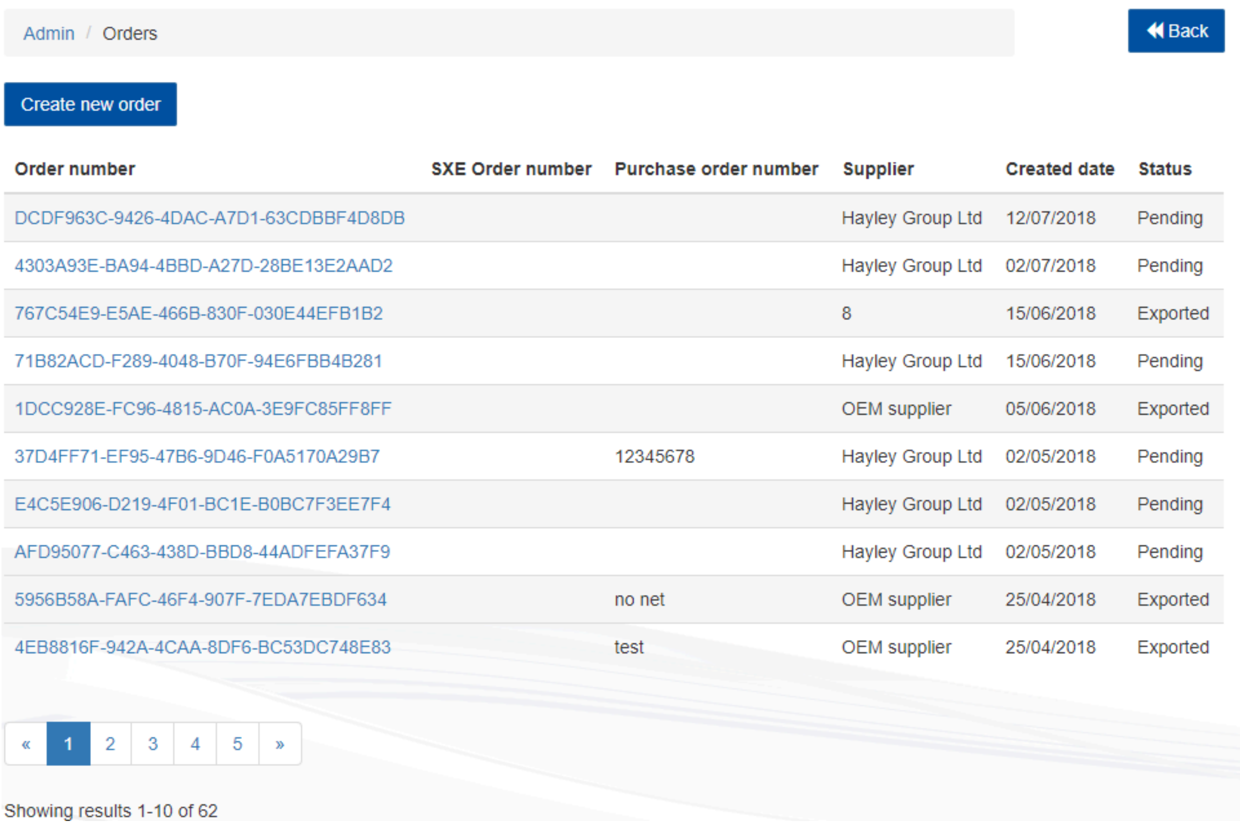
Here you can see a breakdown of details for the products included in the picklist. You can also delete the picklist and print the picklist.

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

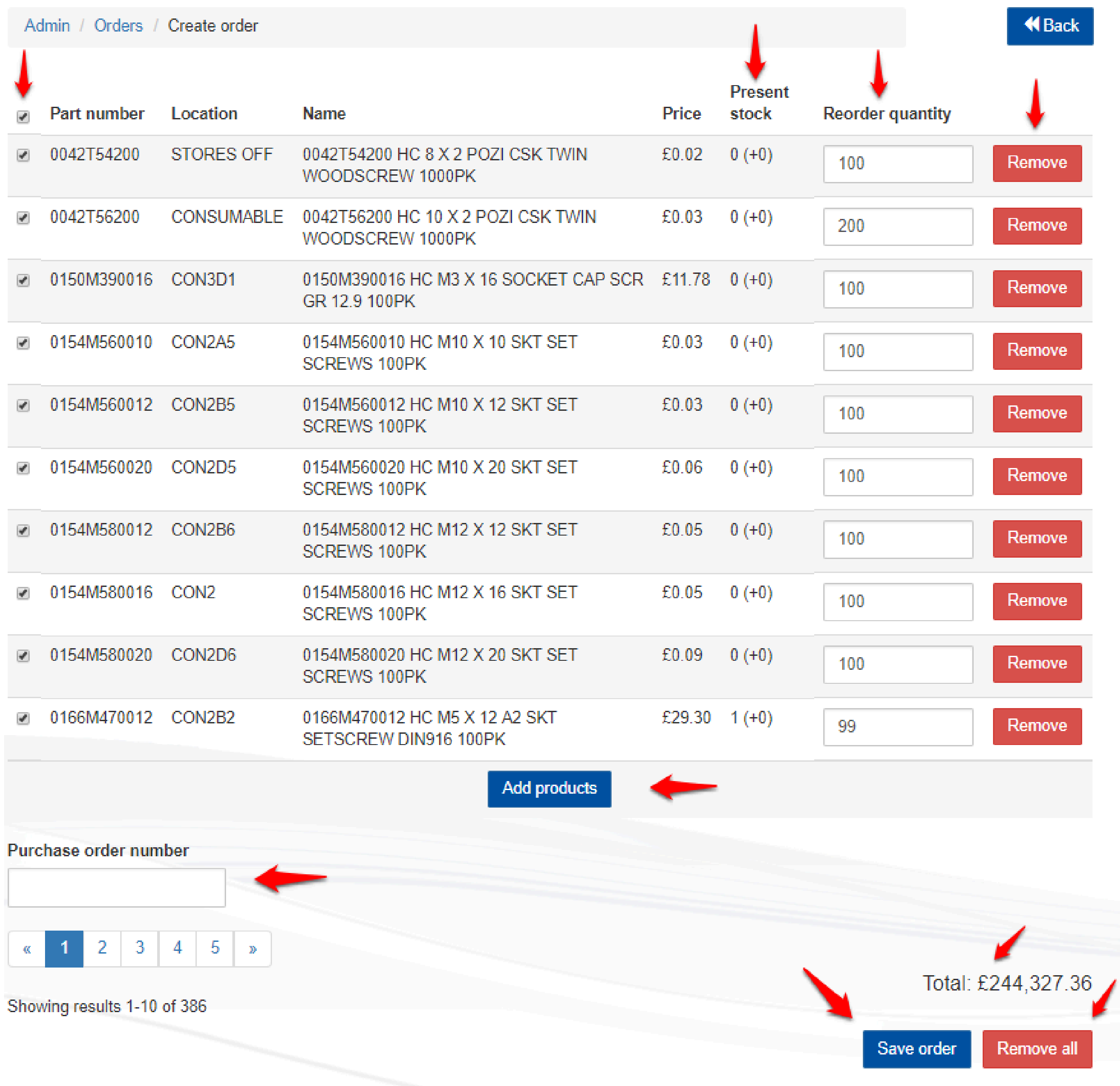
« 1 2 3 4 5 »

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 ×

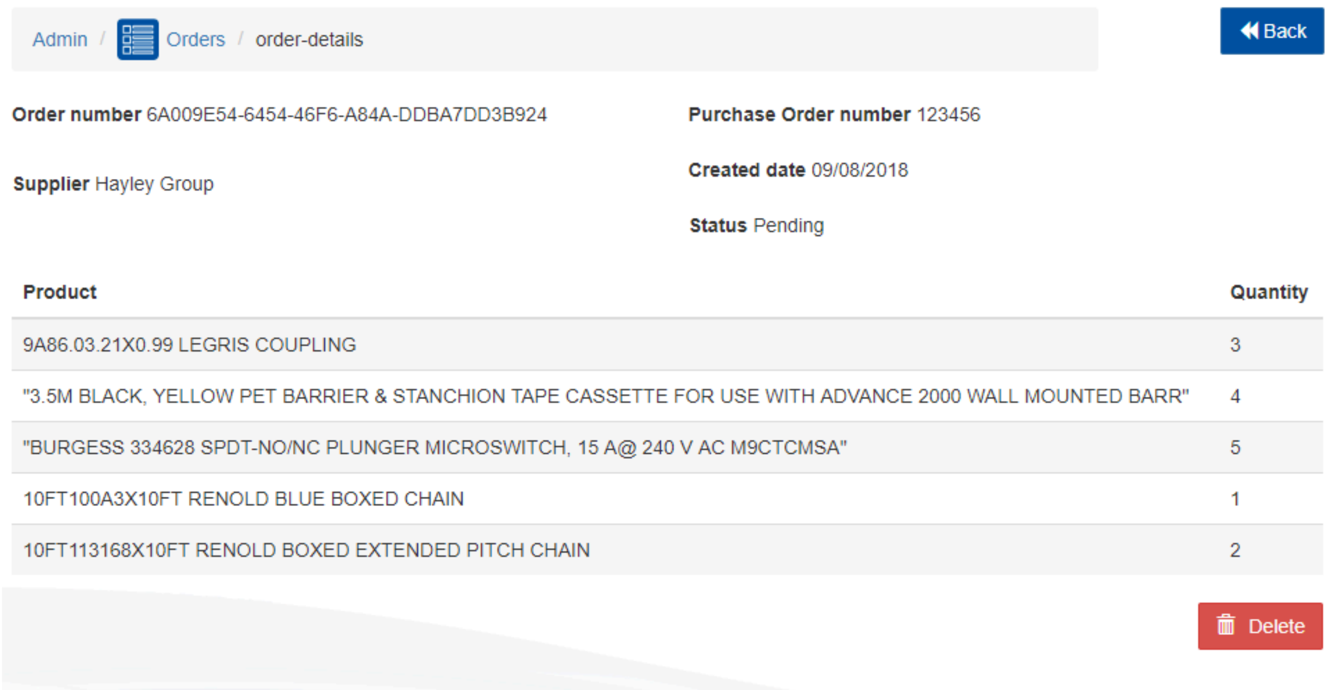
Keyword... | Part number... | Stock location...

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

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.

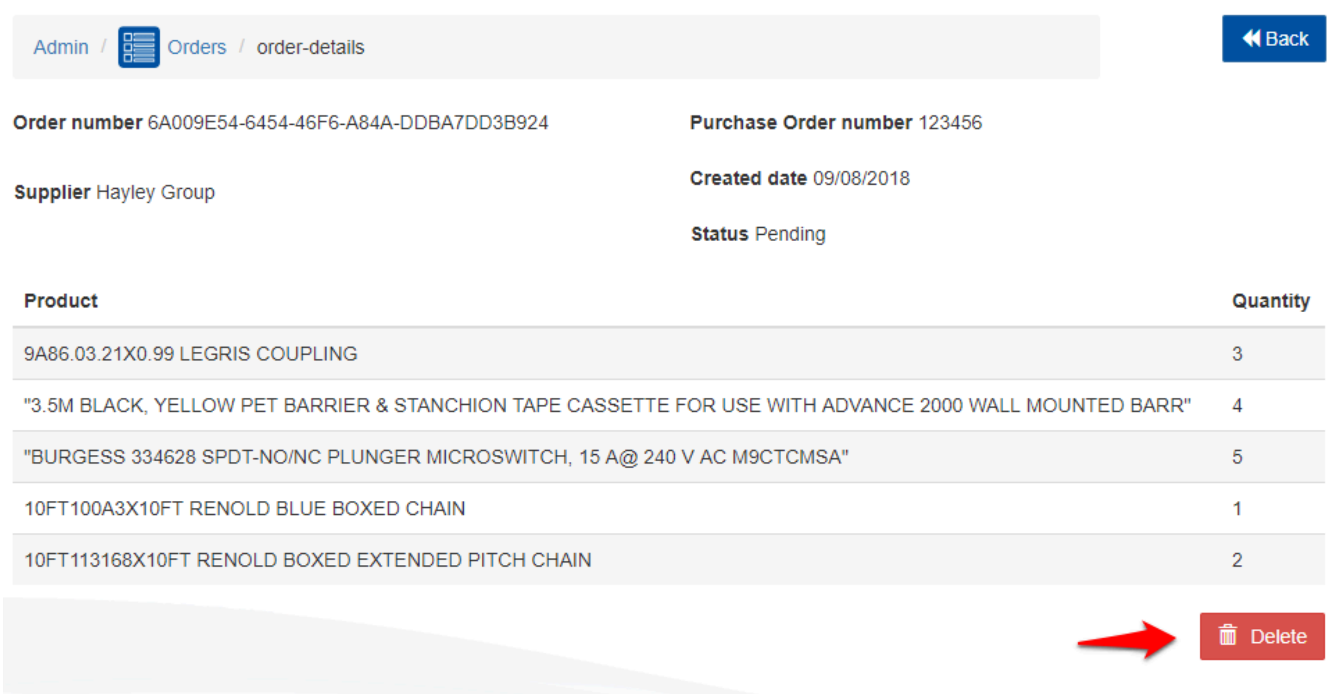
Viewing a Previous Order

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



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.



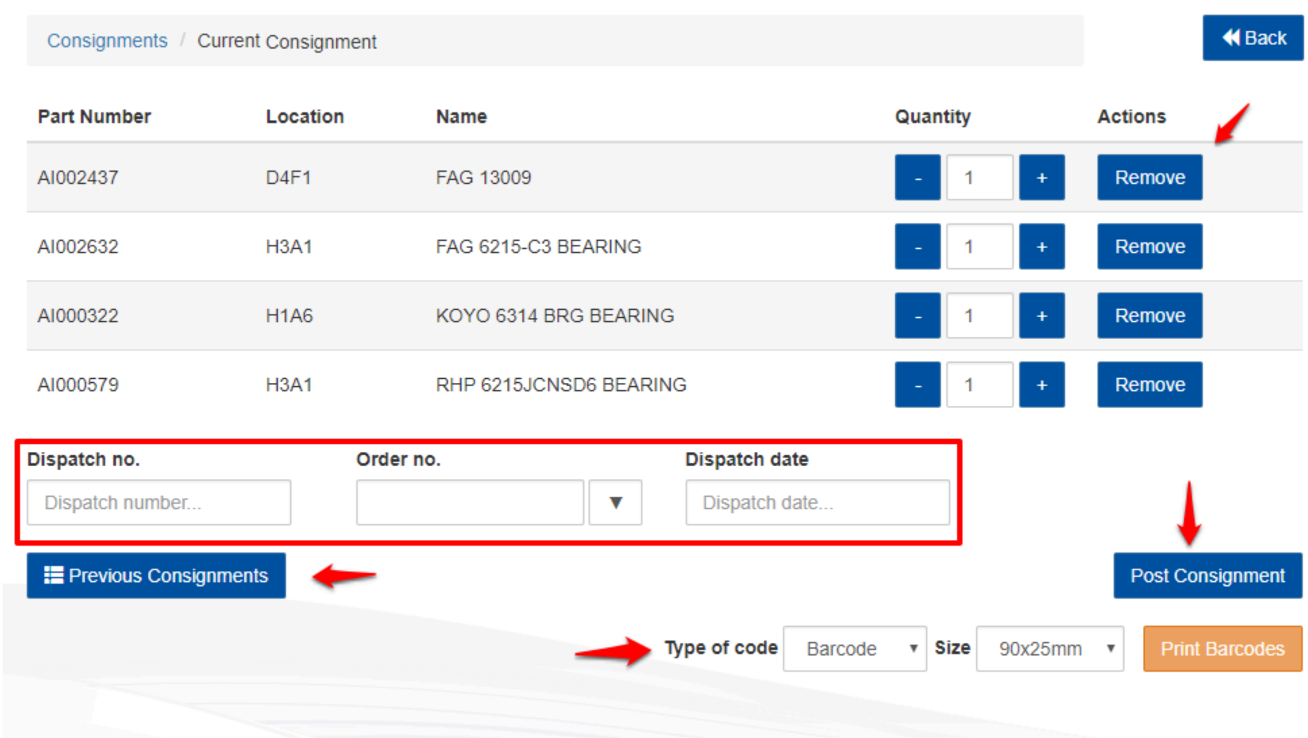
Creating a Consignment

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:



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

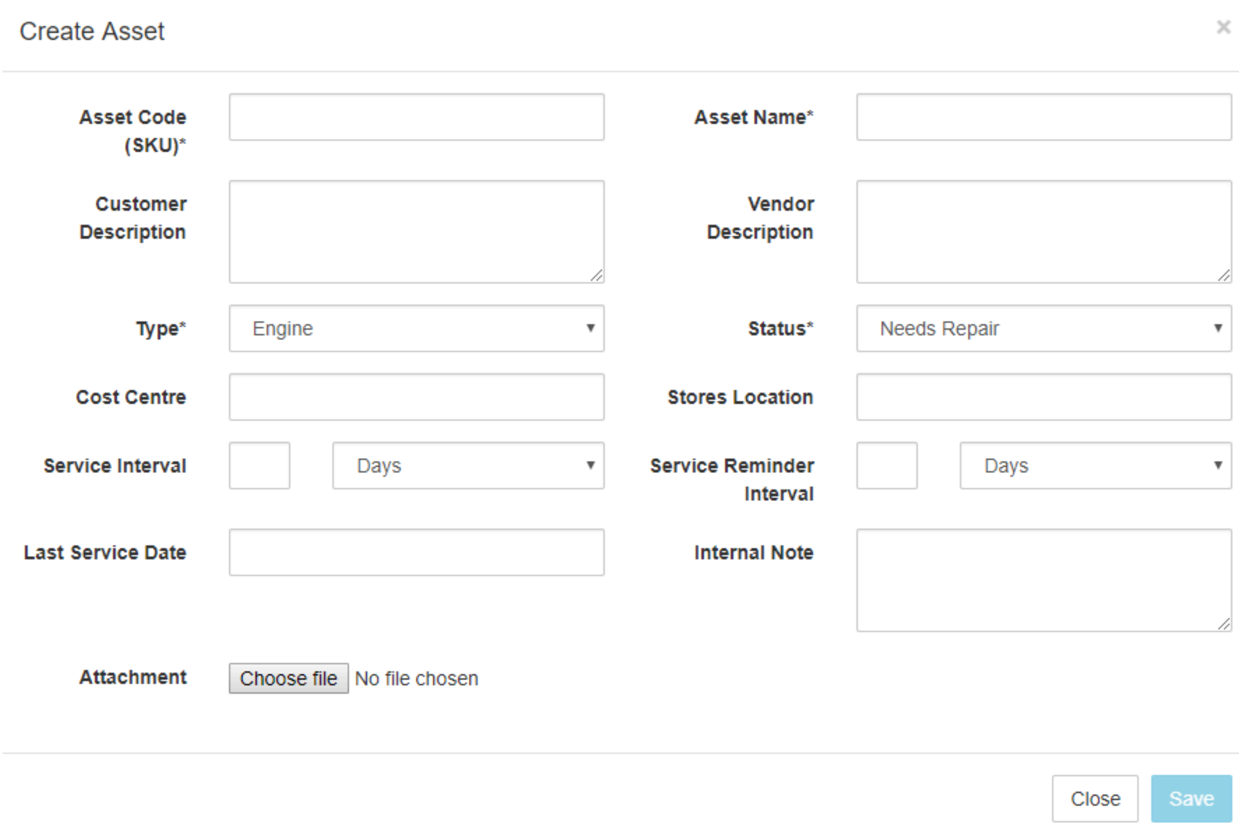
Search by SKU...

+ 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:



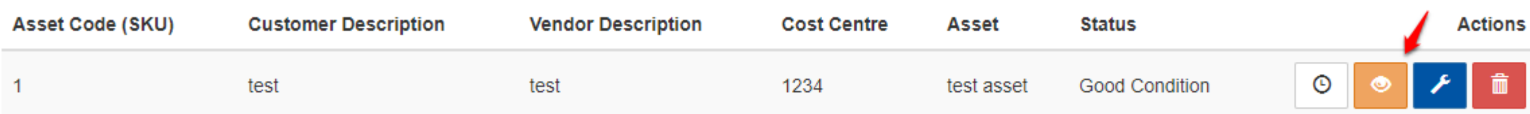
Here you have the following fields:

- **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	

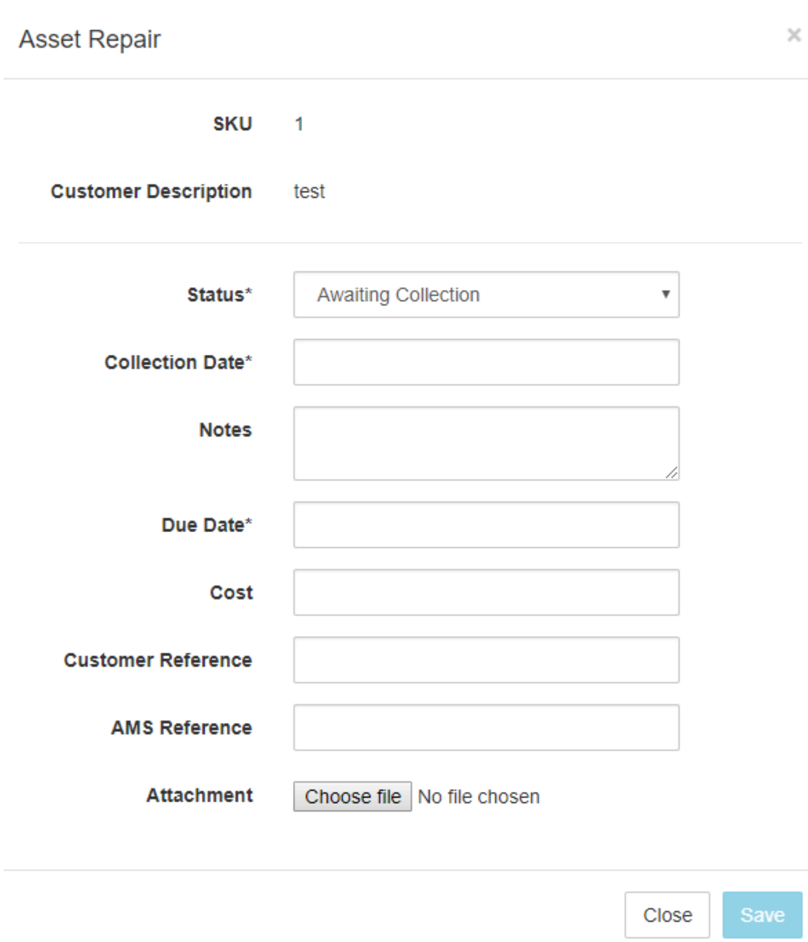
You can also view the history of the asset using the ‘View History’ button, and delete the asset using the ‘Delete Asset’ button. This moves the asset into the ‘Asset register archive’ tab.

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:



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					

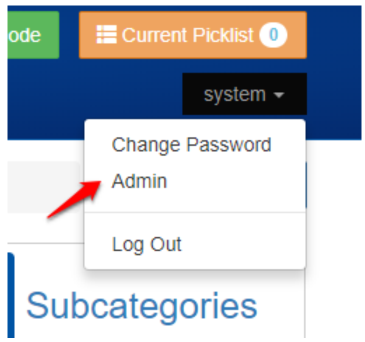
Clicking the ‘View Repair’ icon will allow you to edit the repair.

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

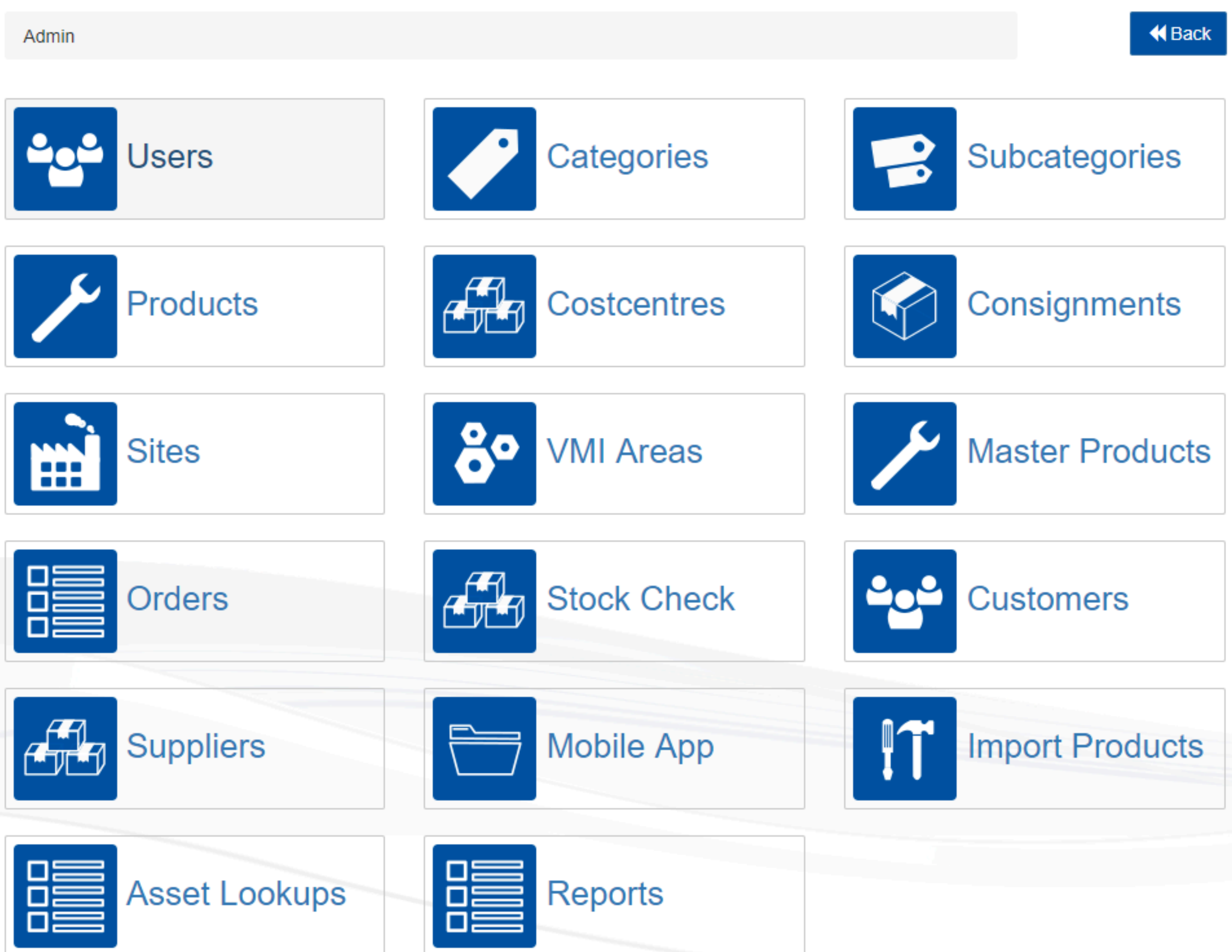
When the status is changed to one that marks the repair as complete, it will be moved into the ‘History’ tab.

The Admin Area

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

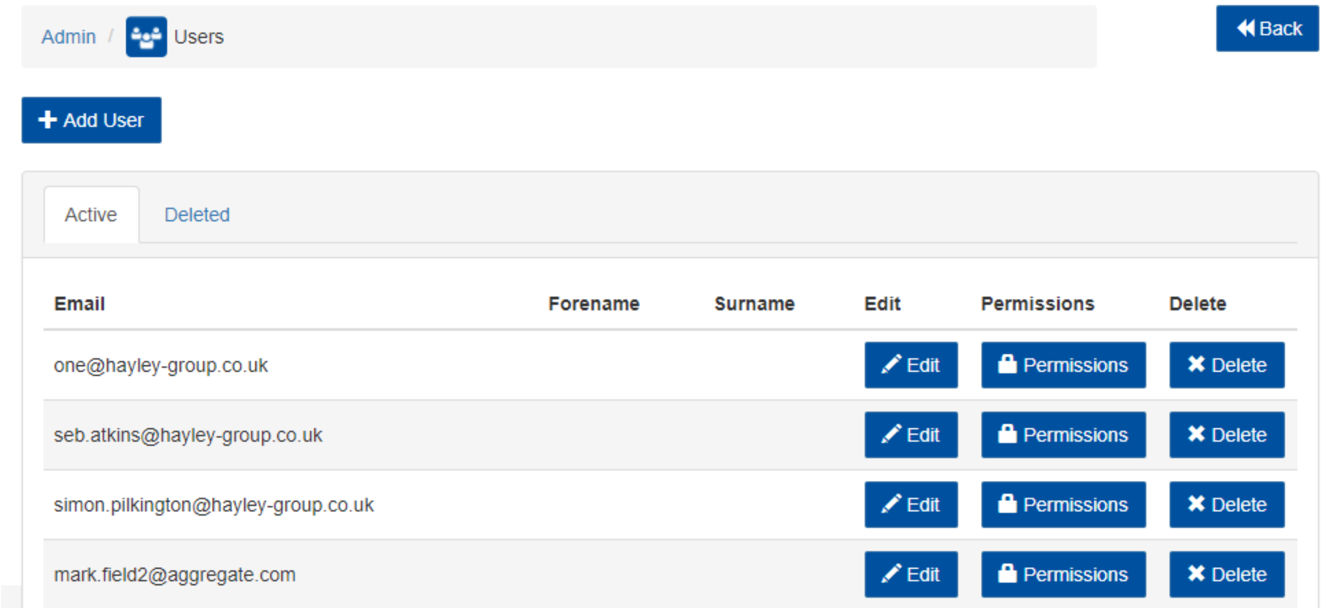


This will take you to the following screen:

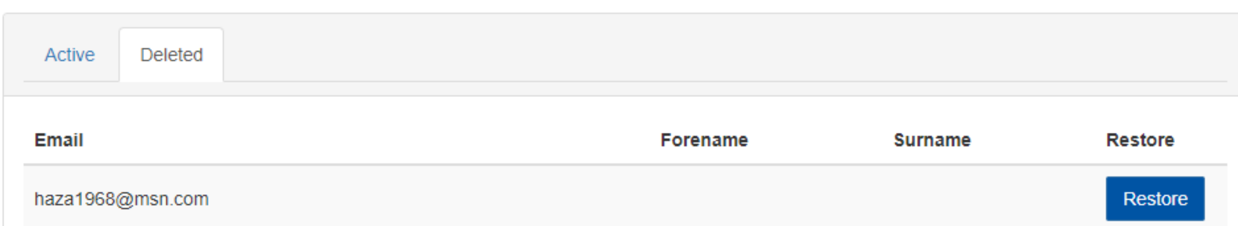


Users

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

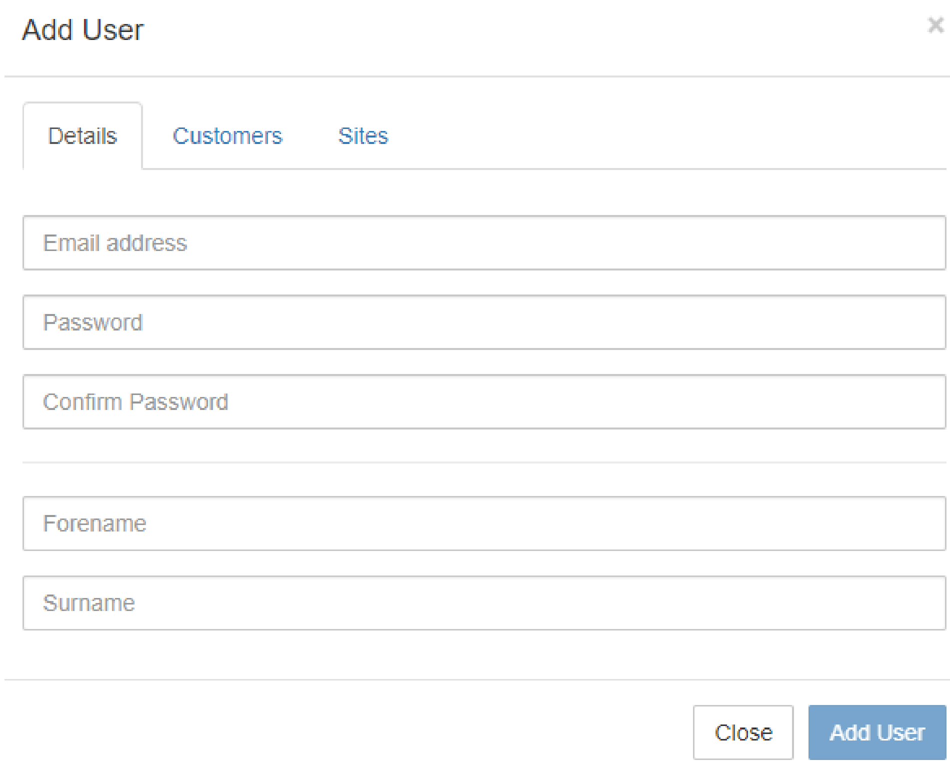


Here you can see a list of active users, with the options to add users, edit users, change a user’s permissions and delete a user.
Clicking the ‘Deleted’ tab will show a list of users that have been deleted from the system. Here you have the ability to restore these users to make them active again.



Adding a User

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



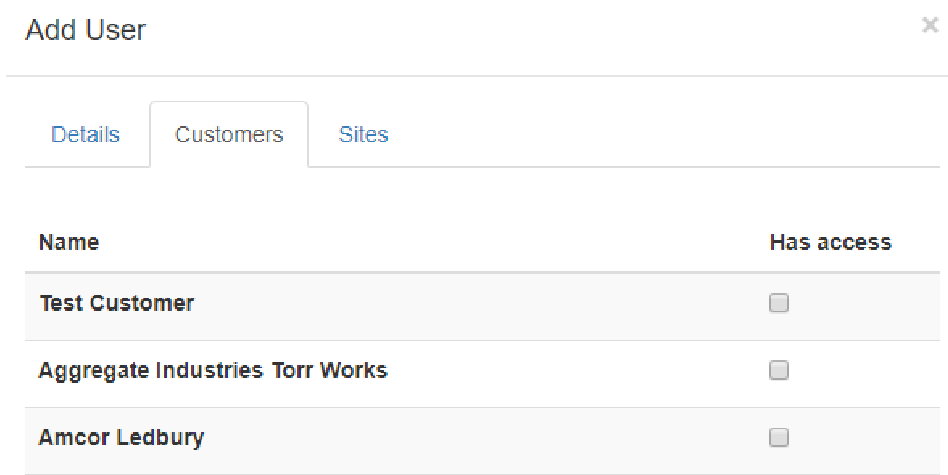
Here you have three tabs: ‘Details’, ‘Customers’ and ‘Sites’.

Details

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

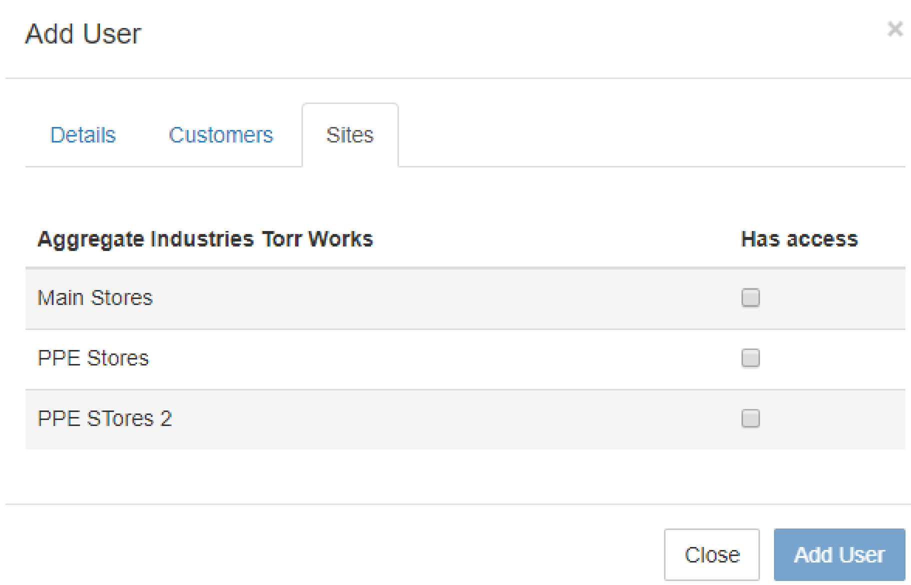
- Email address
- Password
- Confirm Password
- Forename
- Surname

Customers



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.

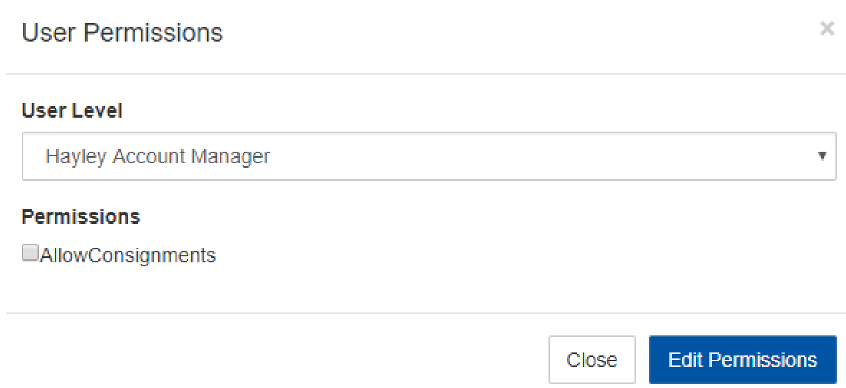
Sites



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:



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

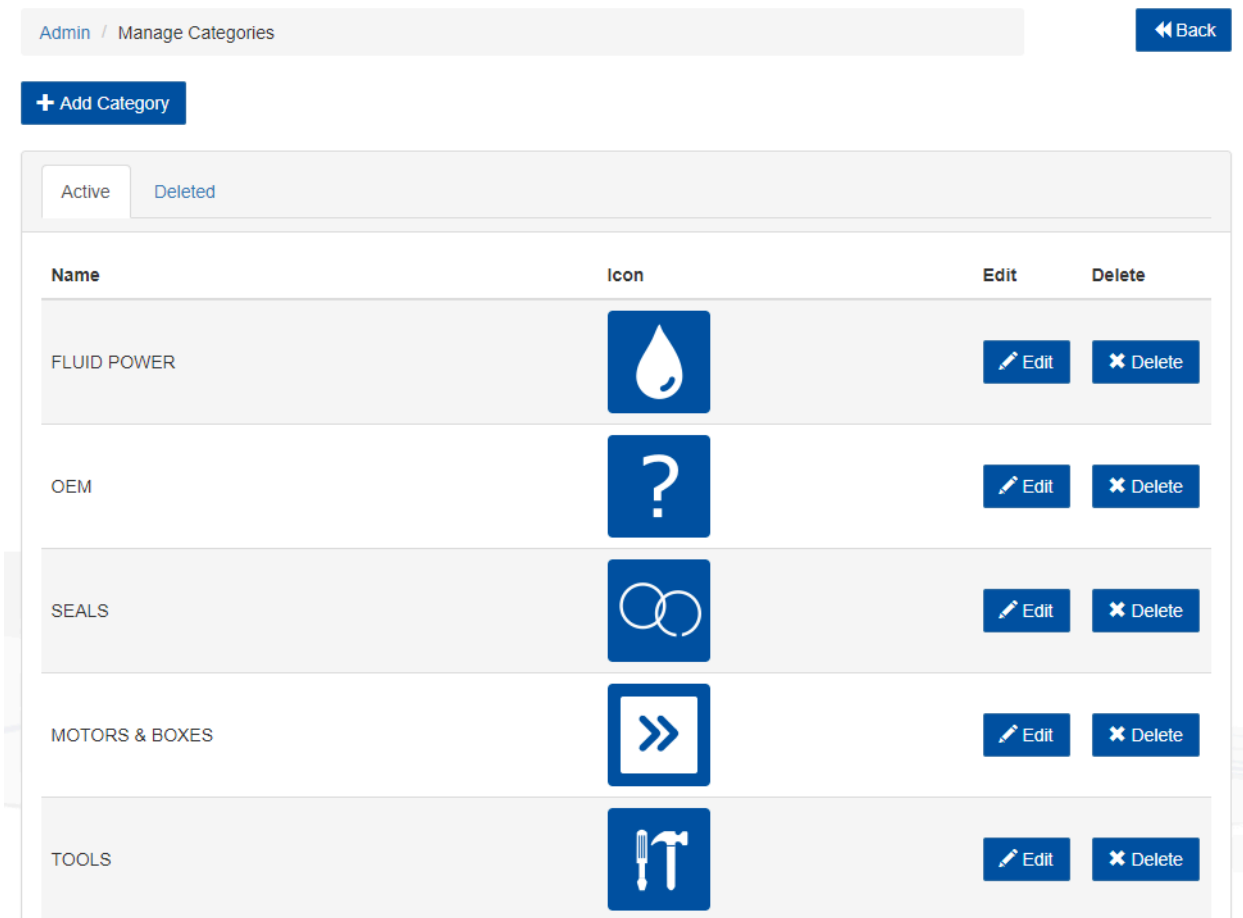
- Super User
- Hayley Admin
- Hayley Account Manager
- Customer Admin
- Customer User

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:



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.

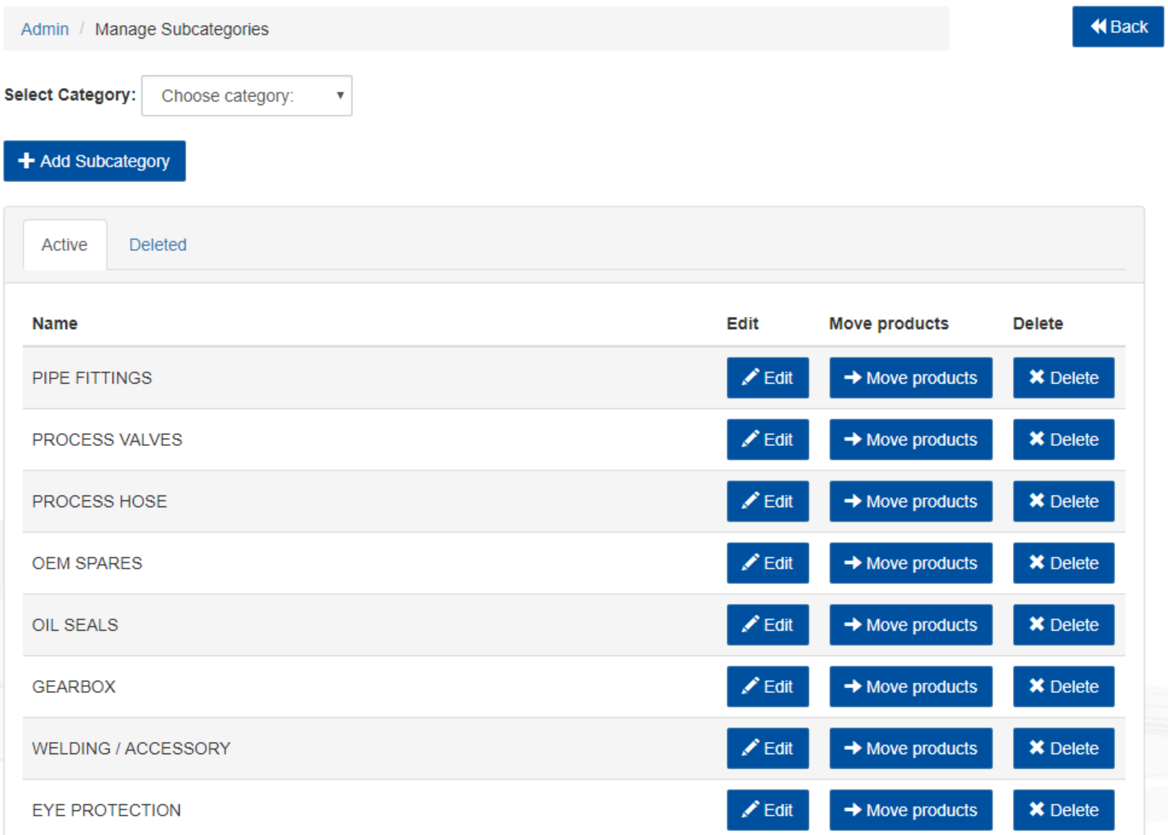
Adding a Category

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

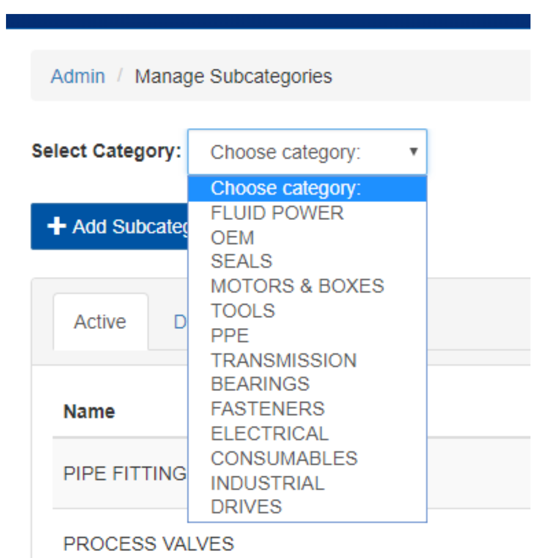
Here you can enter the name for the category and choose a suitable icon.

Subcategories

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



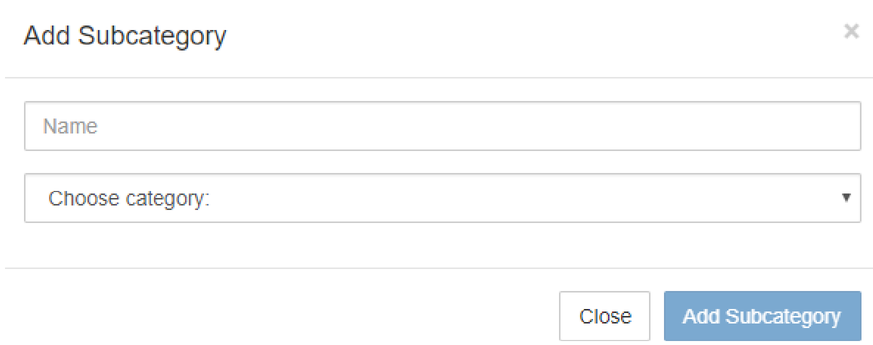
This will show a list of all active subcategories in the system. You have the option to narrow down this list using the select category drop-down, which is a list of the main categories.



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

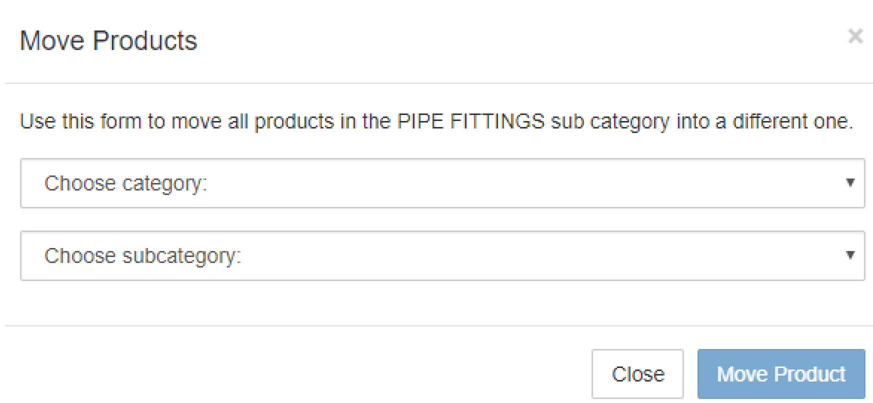
Clicking the 'Add Subcategory' button will generate the following pop-up dialog:



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

Moving Products

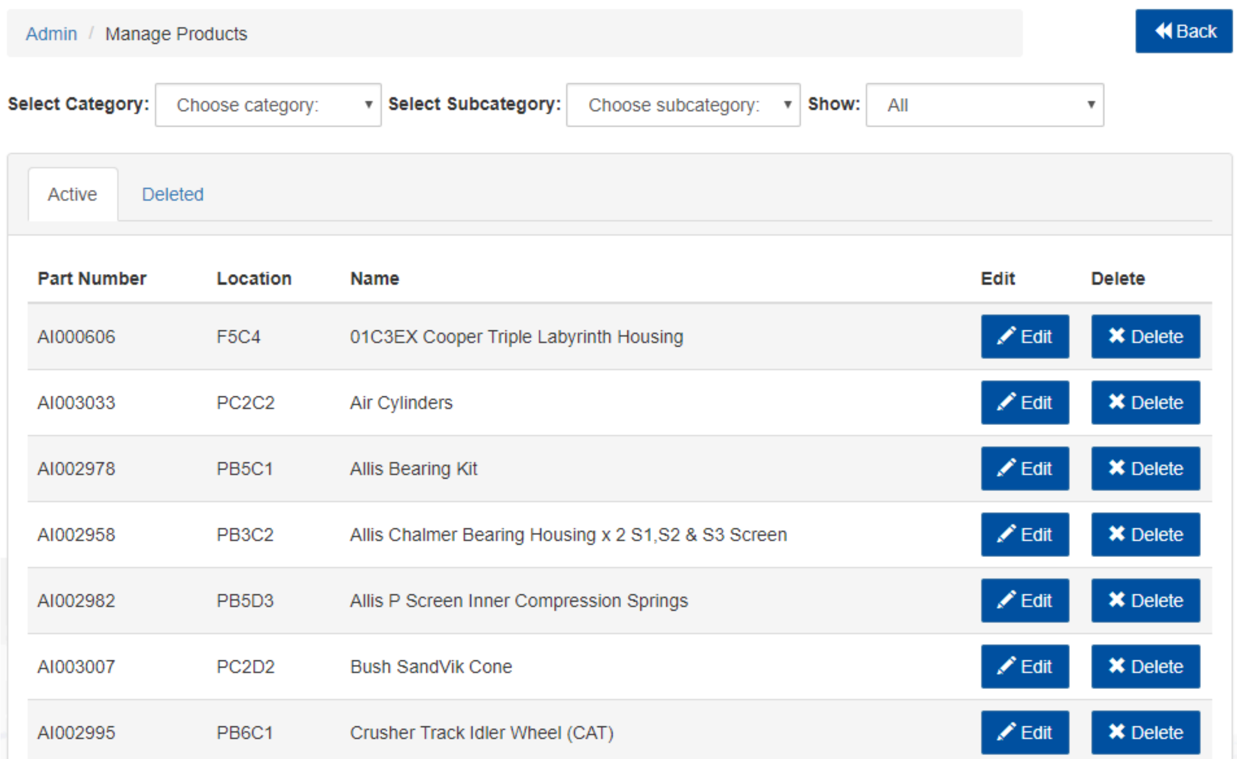
If you need to move products from one subcategory to another, you can use the 'Move products' button. Clicking this will generate the following pop-up dialog:



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

Products

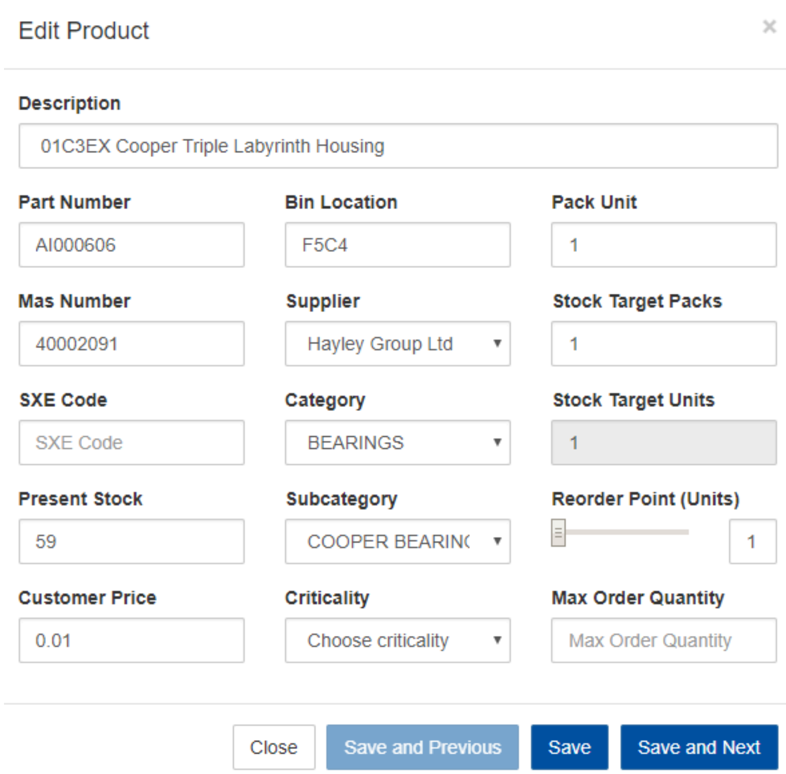
When you visit the ‘Products’ section, you’ll see the following screen:



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:



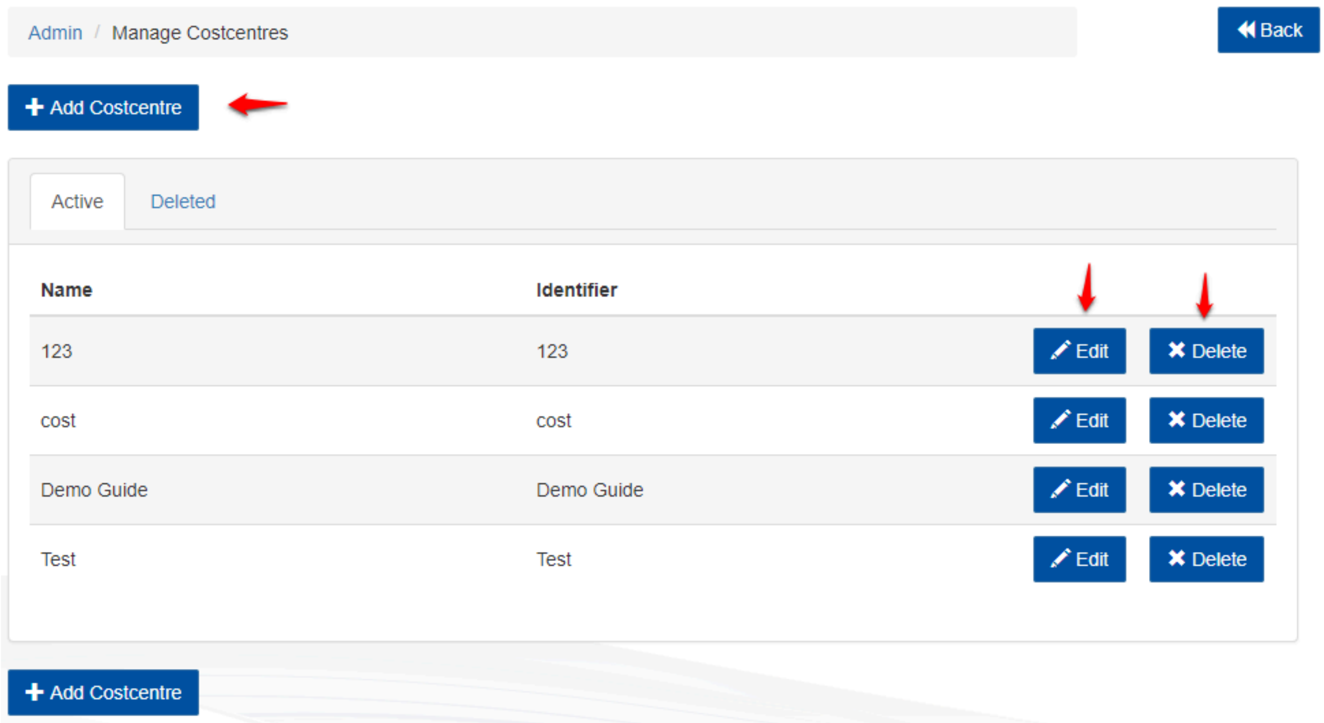
Here you have the following fields:

- **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.

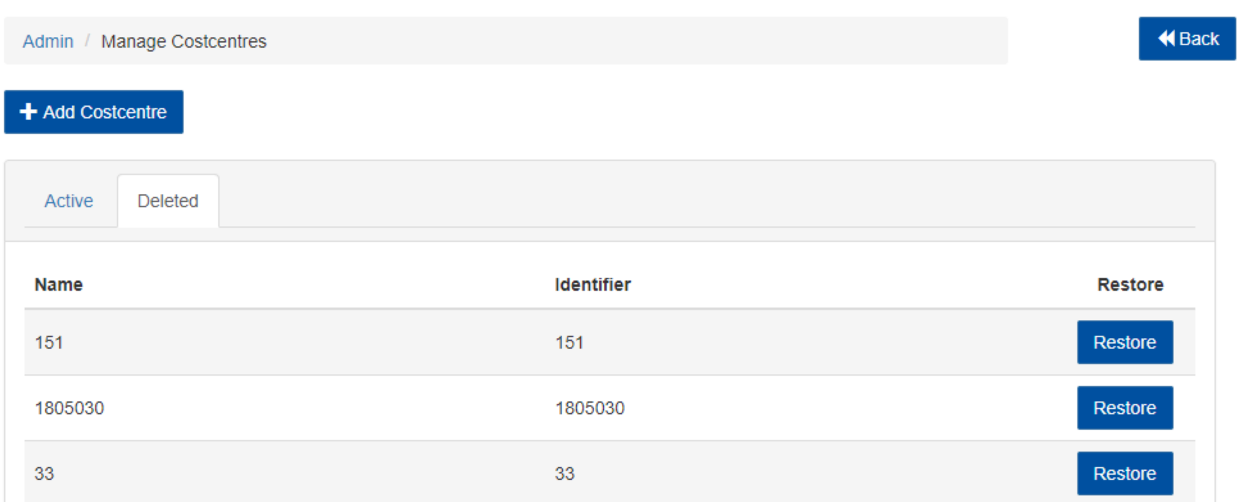
Costcentres

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



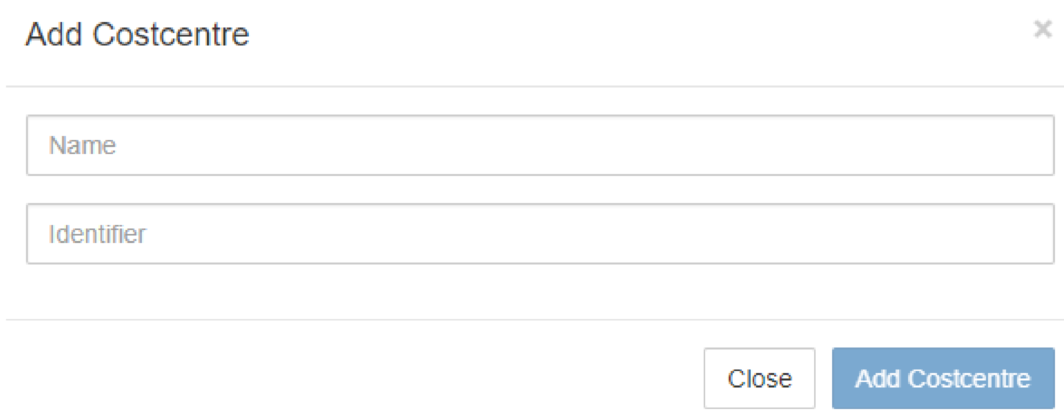
Here you can see the ‘Name’ and ‘Identifier’ of the Costcentre. You also have the options to add a Costcentre, edit a Costcentre or delete a Costcentre.

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



Adding a Costcentre

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



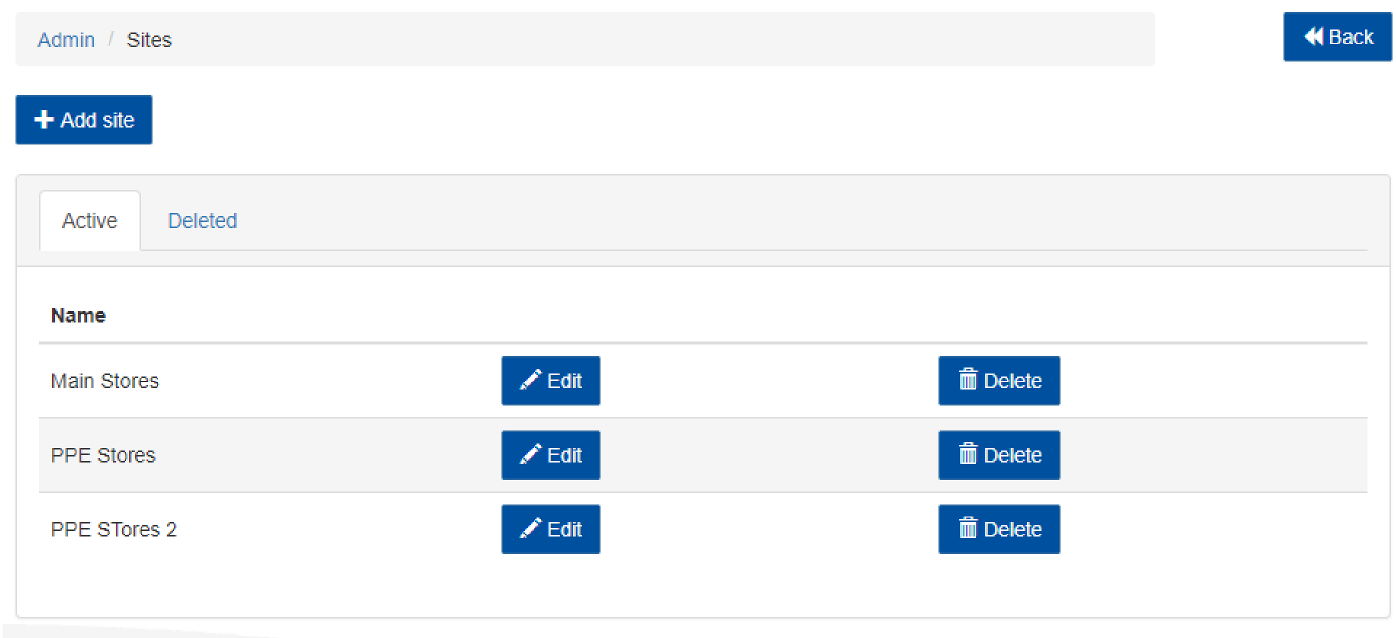
Here you can enter the ‘Name’ and the ‘Identifier’ of the Costcentre.

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:

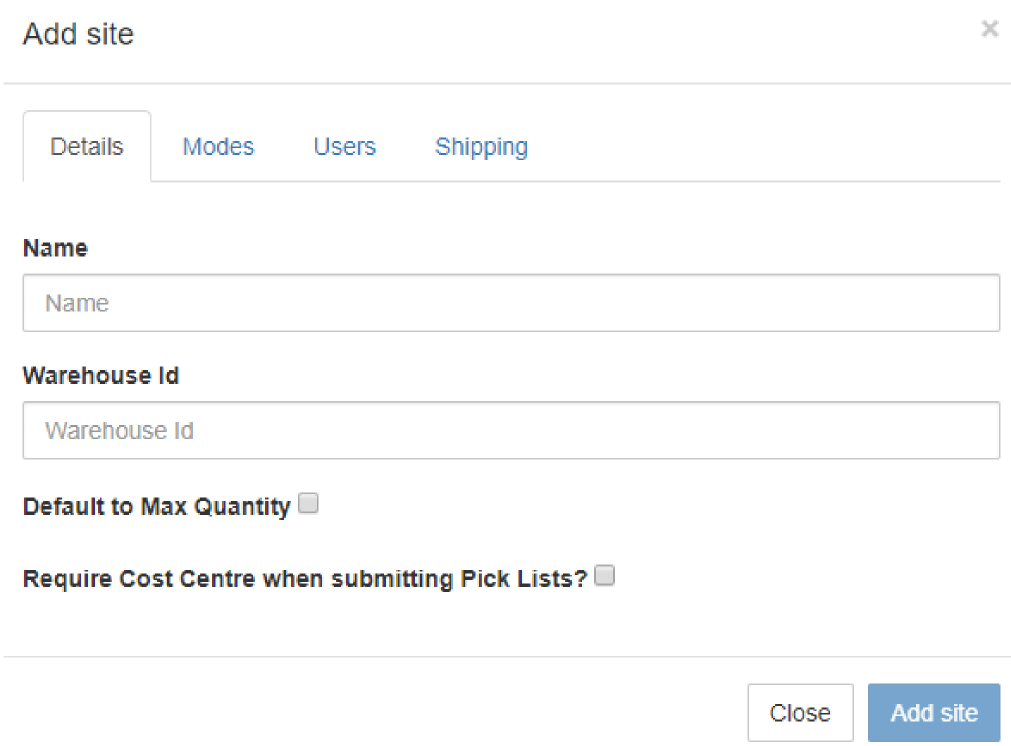


This is a list of all active sites for the customer. From here you can add a site, edit the site or delete the site.

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:



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

Details

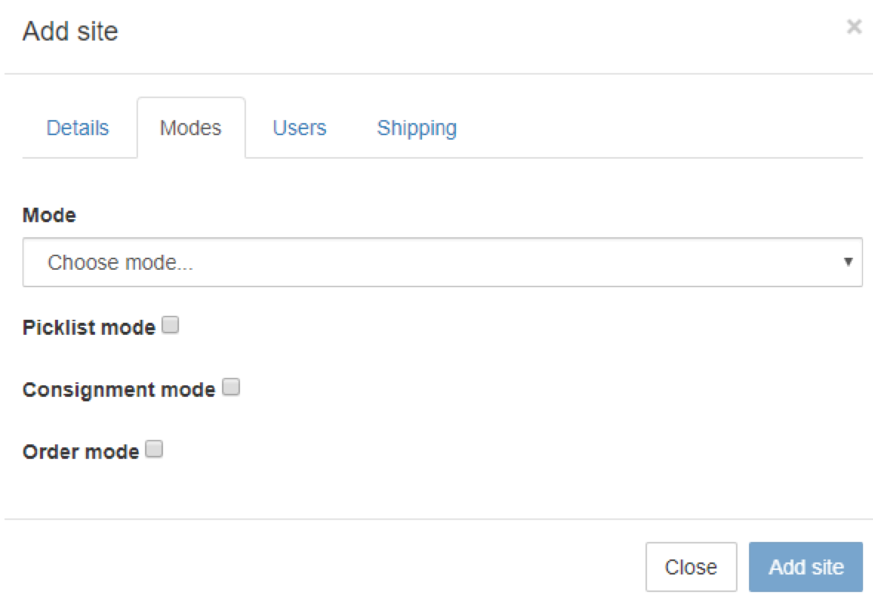
Within this tab you can enter some basic details about the site.

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.

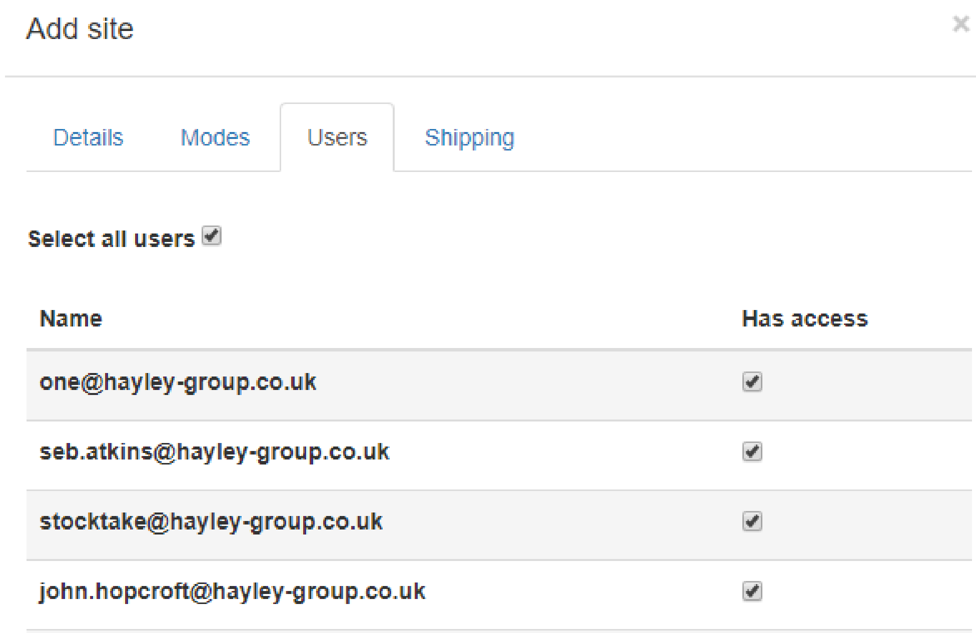
Modes



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.

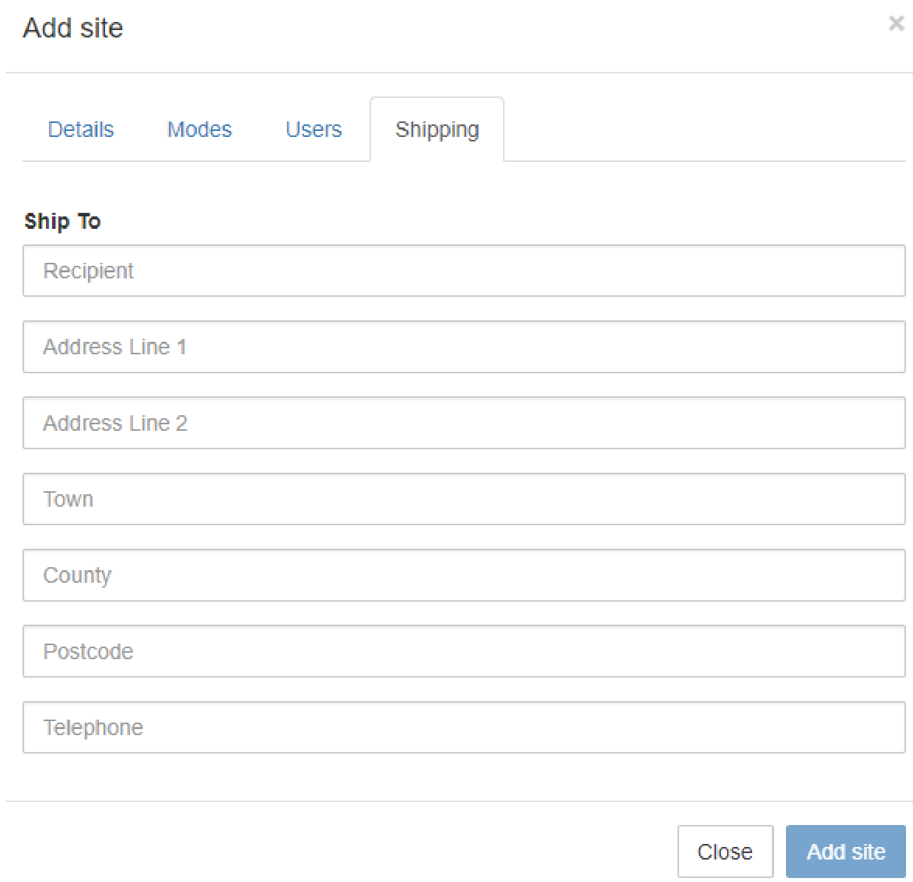
Users



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

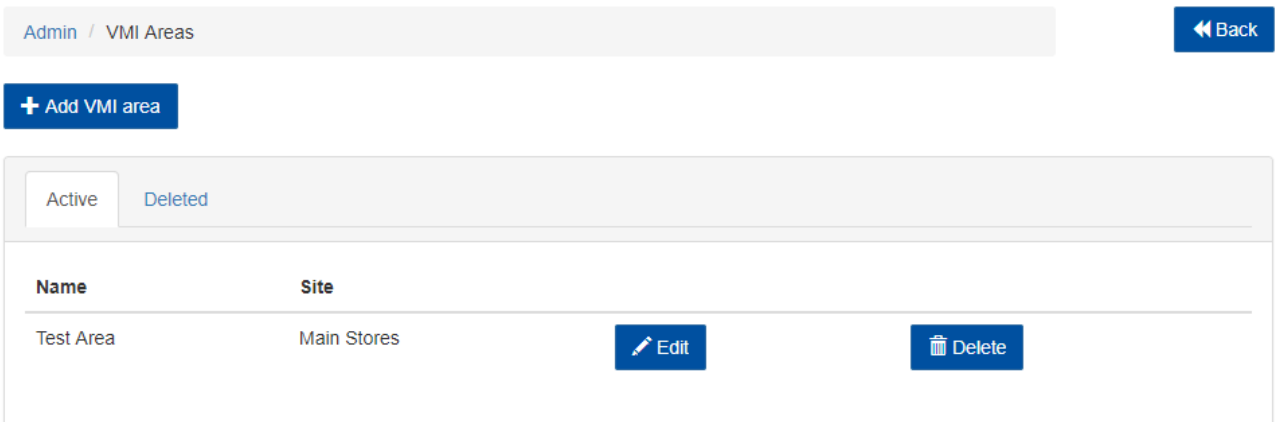


Here you can add the shipping address for the site.

VMI Areas (Rail Only)

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

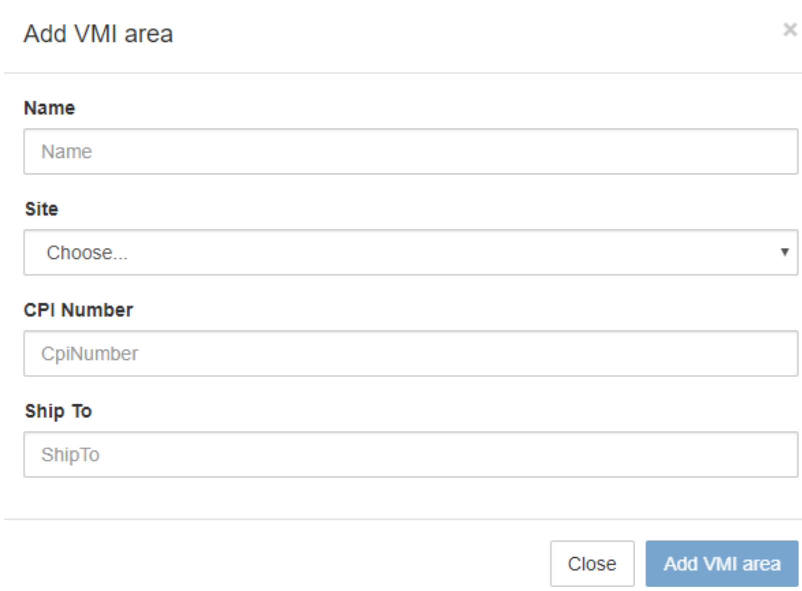
When you visit the 'VMI Areas' section, you'll see the following screen:



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:

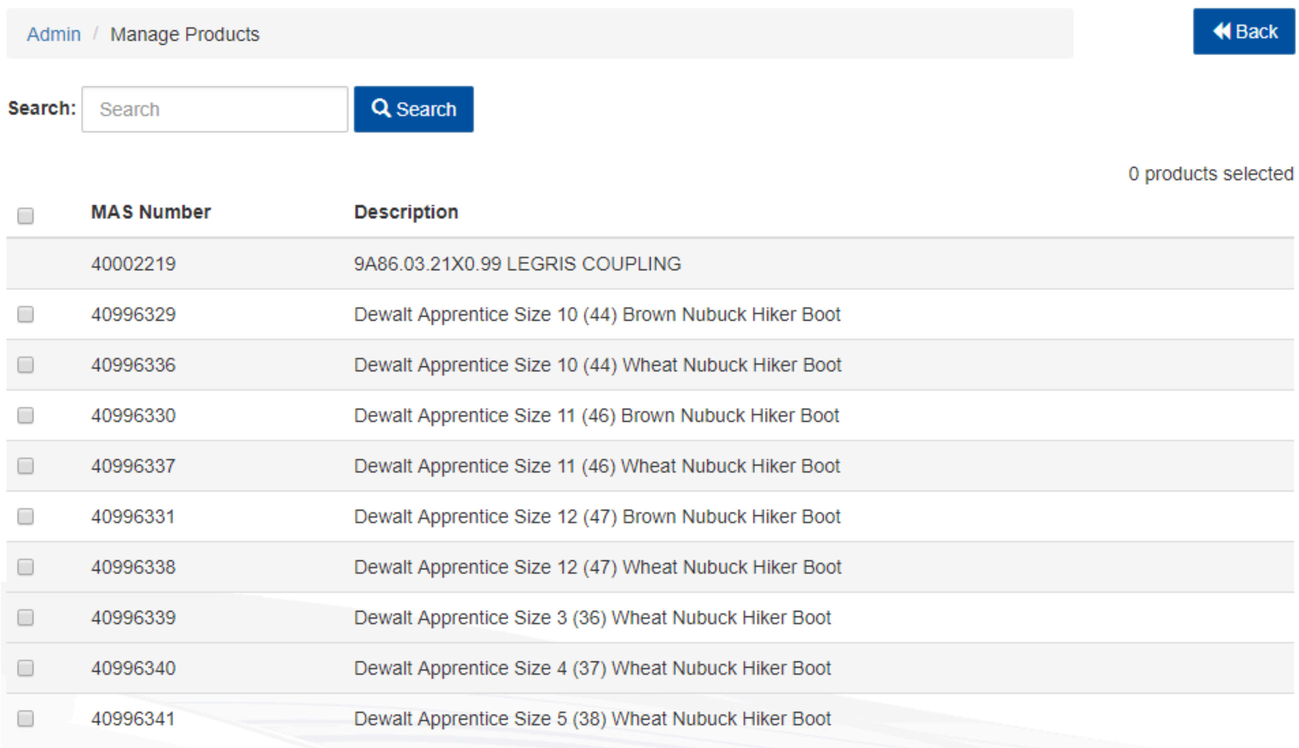


Here you have the following fields:

- **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

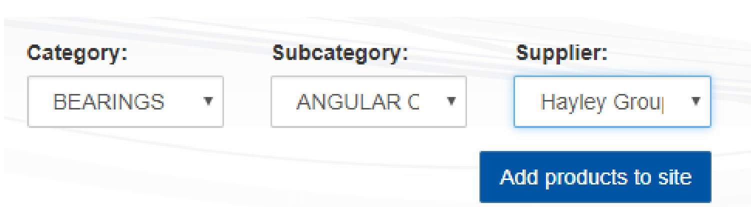
When you visit the ‘Master Products’ section, you’ll see the following screen:



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:



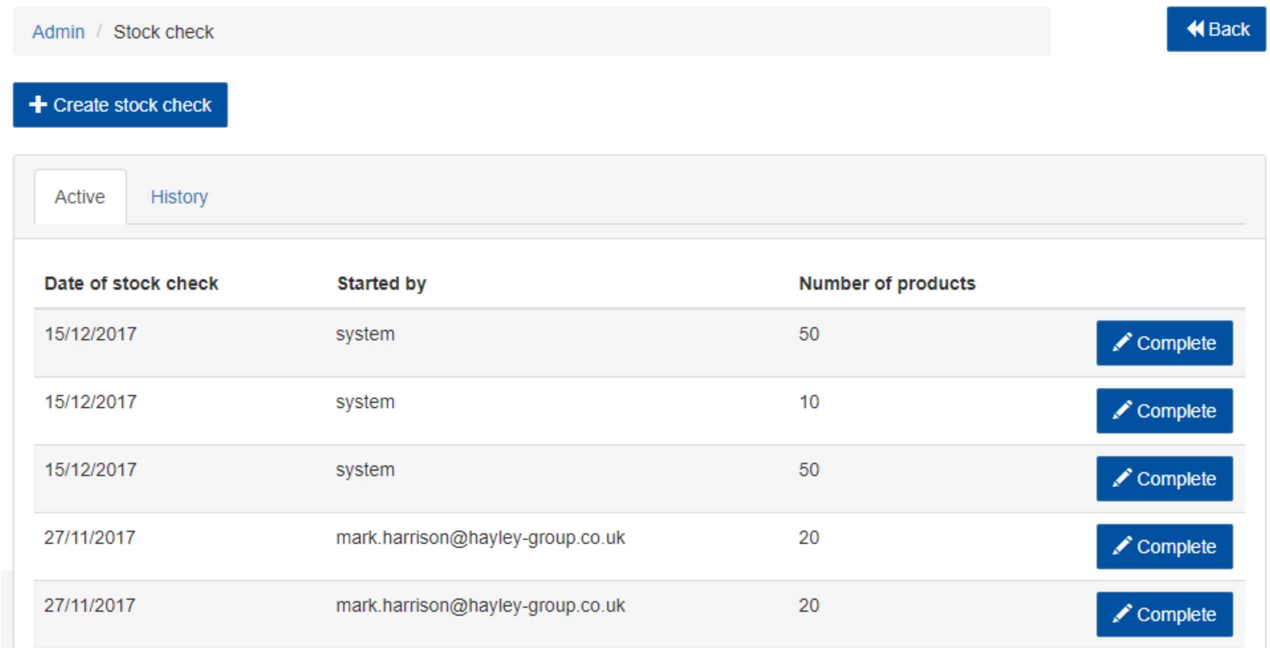
This lets you select the category, subcategory and supplier of the product, then add it to the site.

Orders

This section is where you will create orders. To find out more about this, click <u>here</u>.

Stock Check

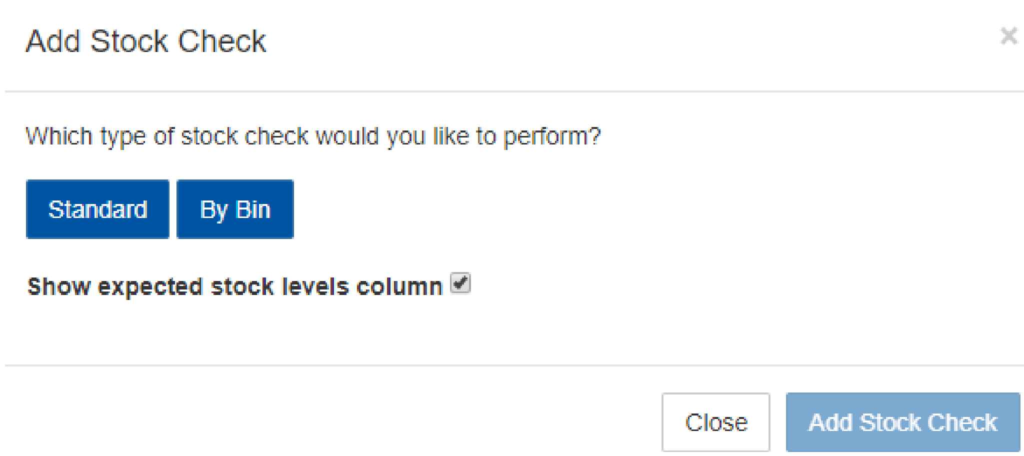
When you visit the 'Stock Check' section, you'll see the following screen:



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:

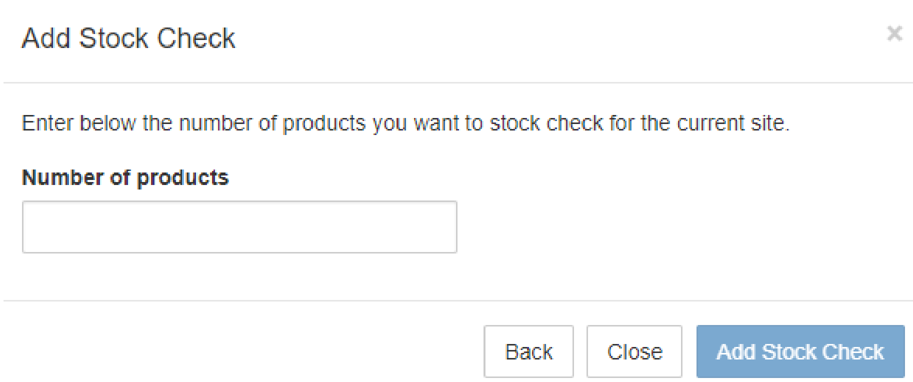


Here you have the option to create a ‘Standard’ stock check, or a stock check ‘By Bin’.
Use the ‘Show expected stock levels column’ checkbox if you’d like your stock check to include an extra column showing the stock levels the system expects there to be.

Standard

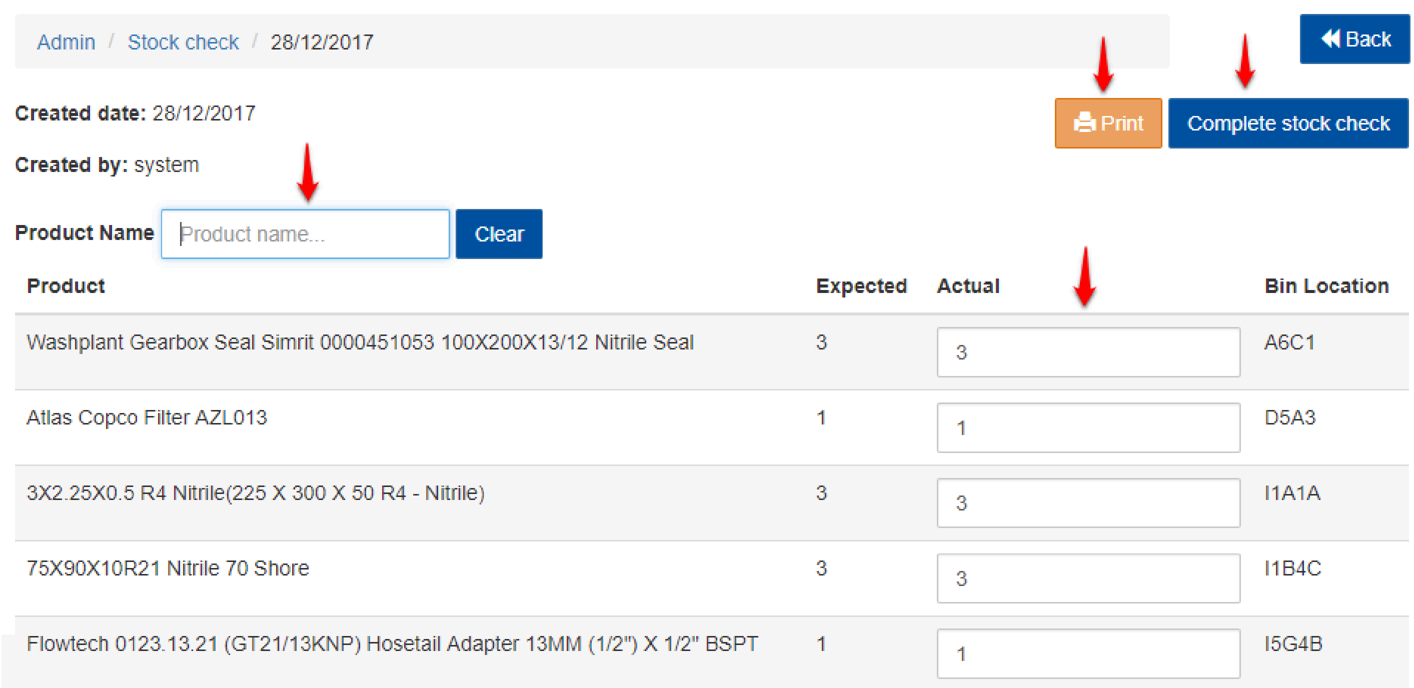
To start a standard stock check, click the ‘Standard’ button.

This will change the pop-up to the following:



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

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



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:

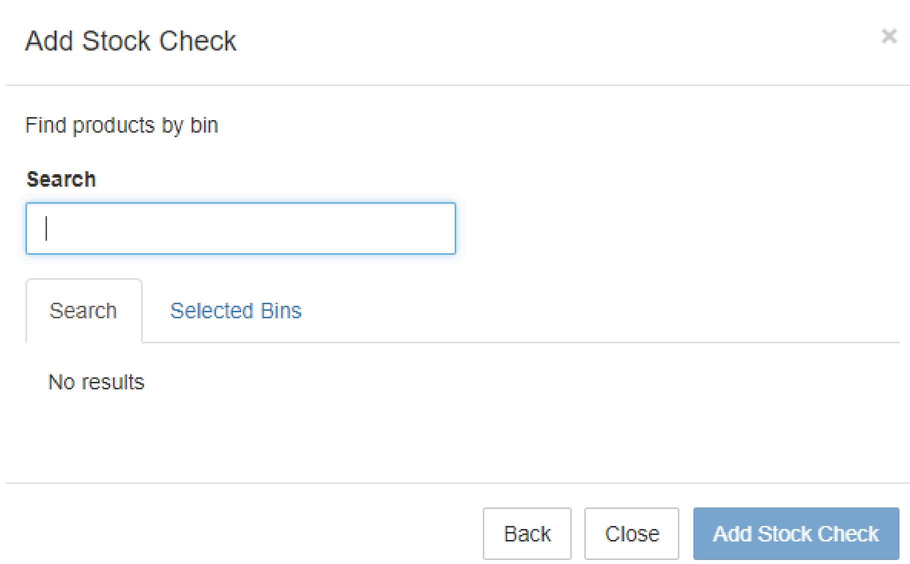
- **Search -** You can use this field to search for a specific product within the stock check.
- **Print -** Clicking this will allow you to print the stock check.
- **Actual -** Here you enter the number of products you've counted when doing the check. This can be different to the expected number.
-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

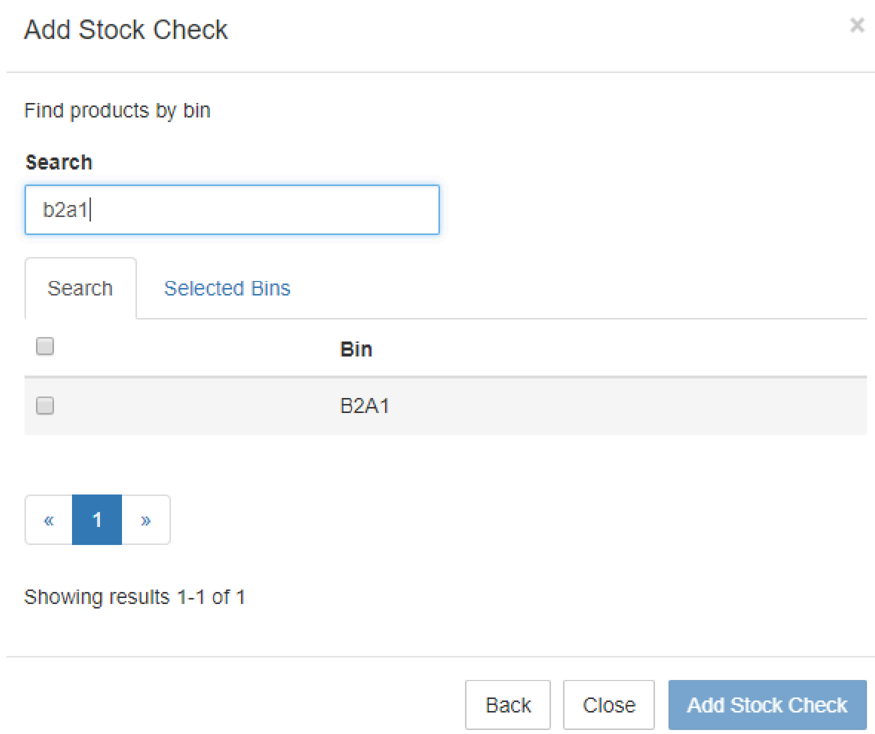
To start a stock check by bin location, click the 'By Bin' button.

This will change the pop-up to the following:

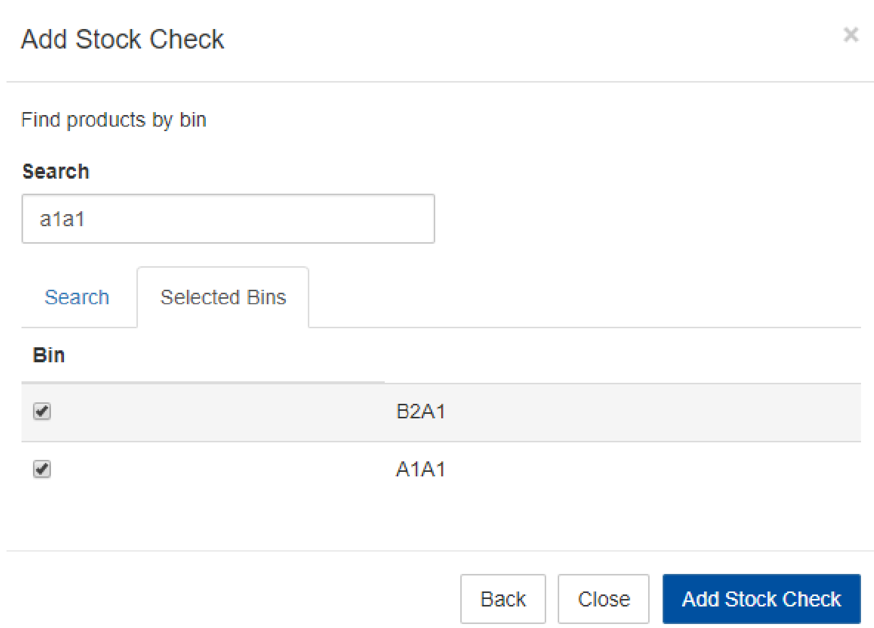


Using the 'Search' field, you can search for a specific bin, either using its full ID or a partial one.

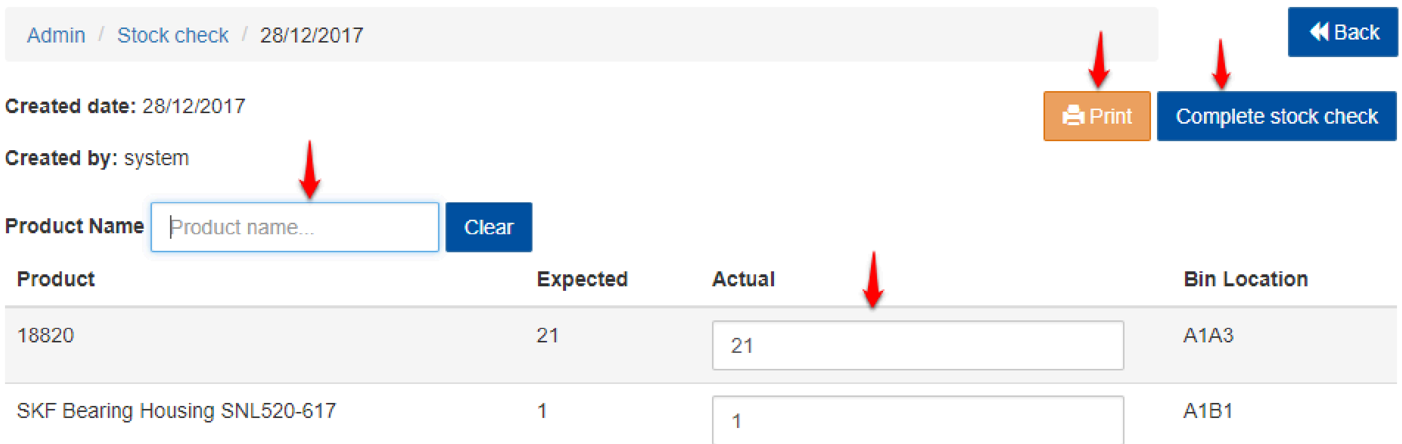
After searching for a bin, the pop-up will look like the following:



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:



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



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.

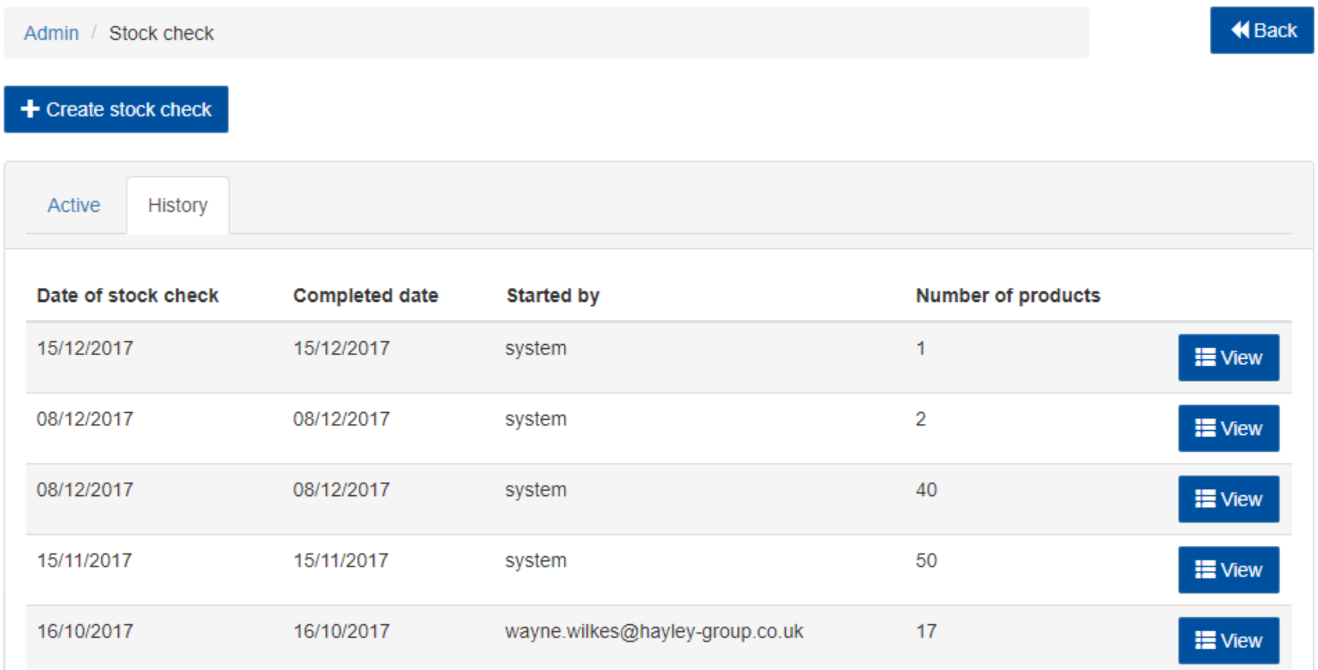
Completing an Incomplete Stock Check

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.

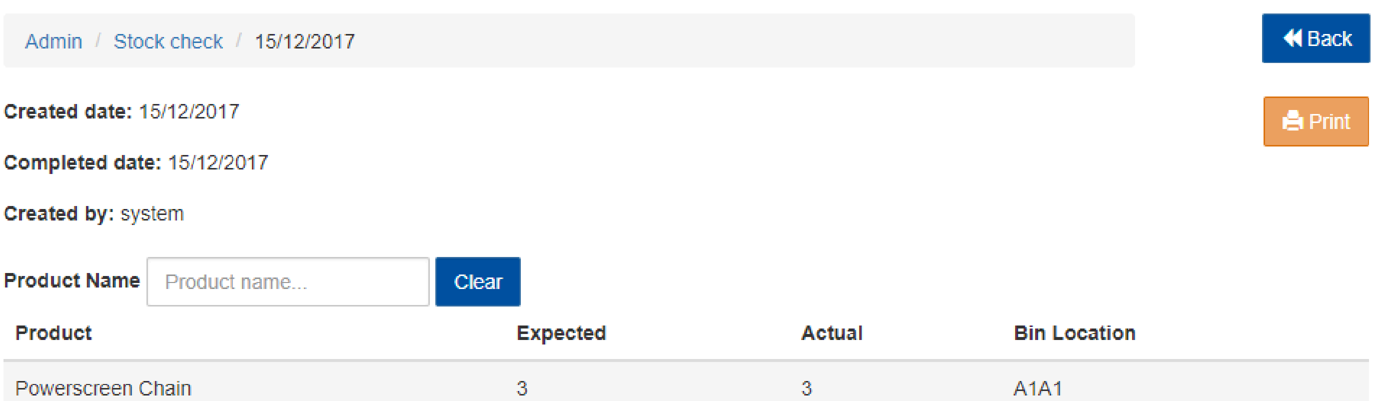
Viewing Previous Stock Checks

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:



This shows a list of all previously completed stock checks.

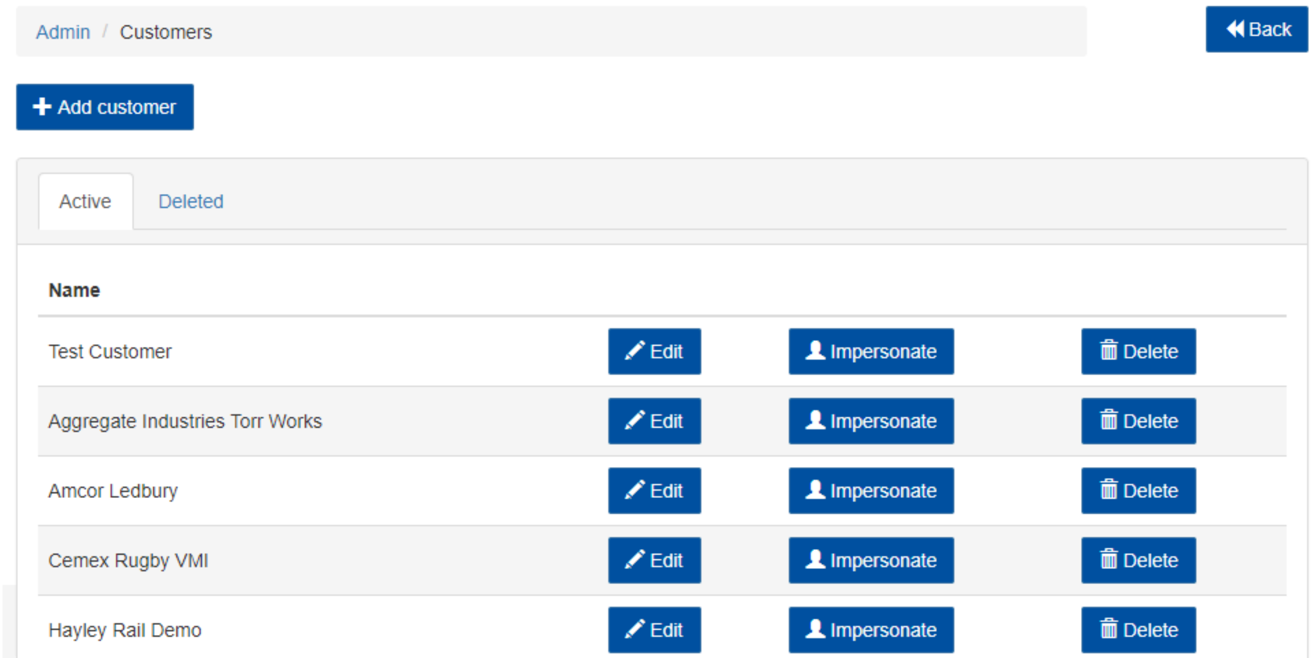
Clicking the 'View' button will generate the following screen:



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

Customers

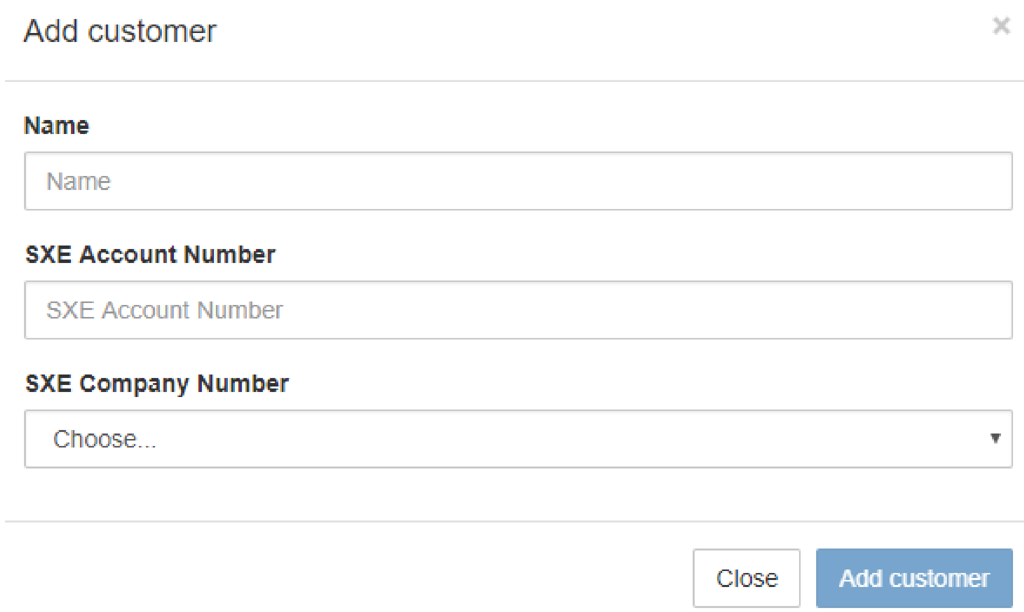
When you visit the 'Customers' section, you'll see the following screen:



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:



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

Impersonating a Customer

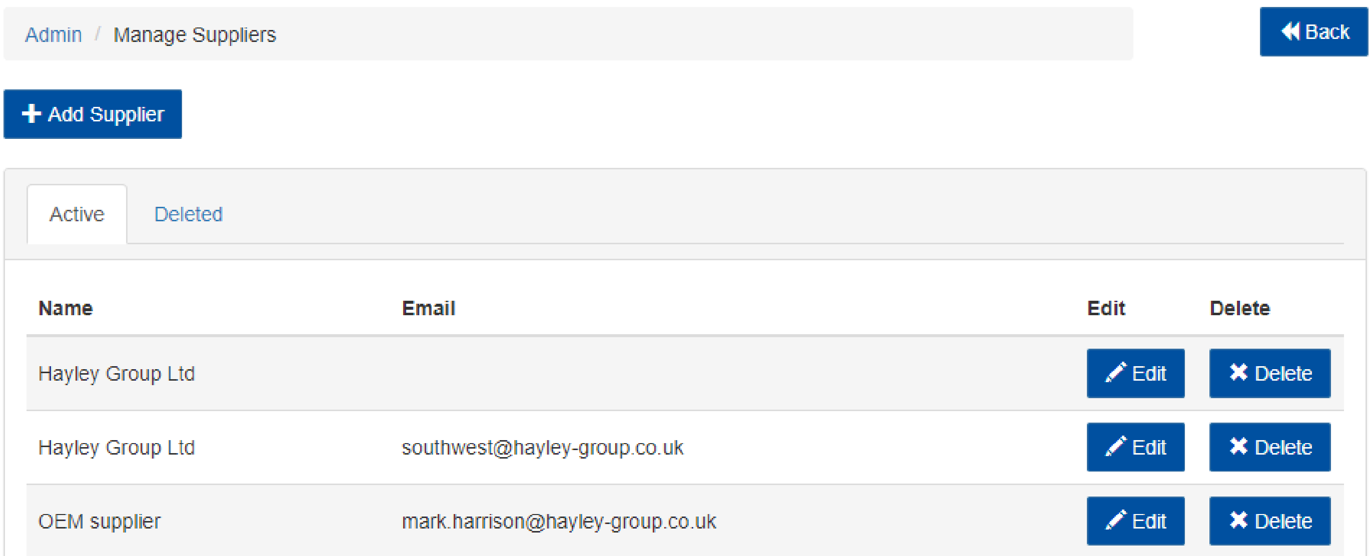
Clicking the 'Impersonate' button allows you to view the system as if you were logged in as that specific customer. This has the same effect as when you select a different customer from the customer drop-down in the header.

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

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

Suppliers

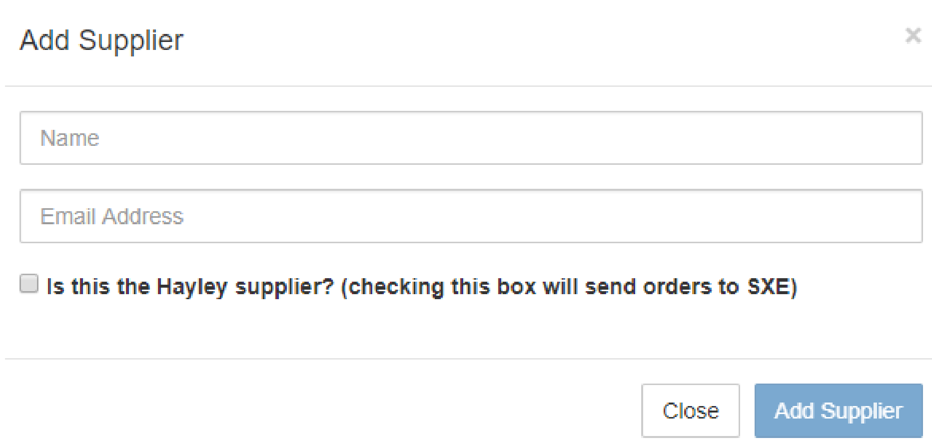
When you visit the ‘Suppliers’ section, you’ll see the following screen:



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:



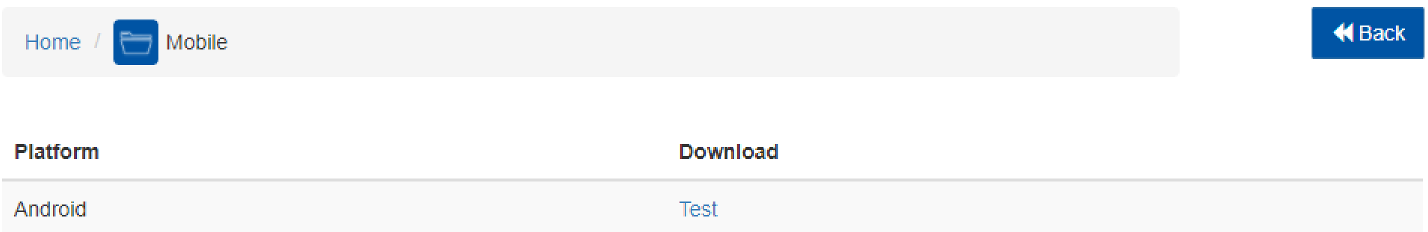
Here you can enter the name and email address of the supplier.

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:



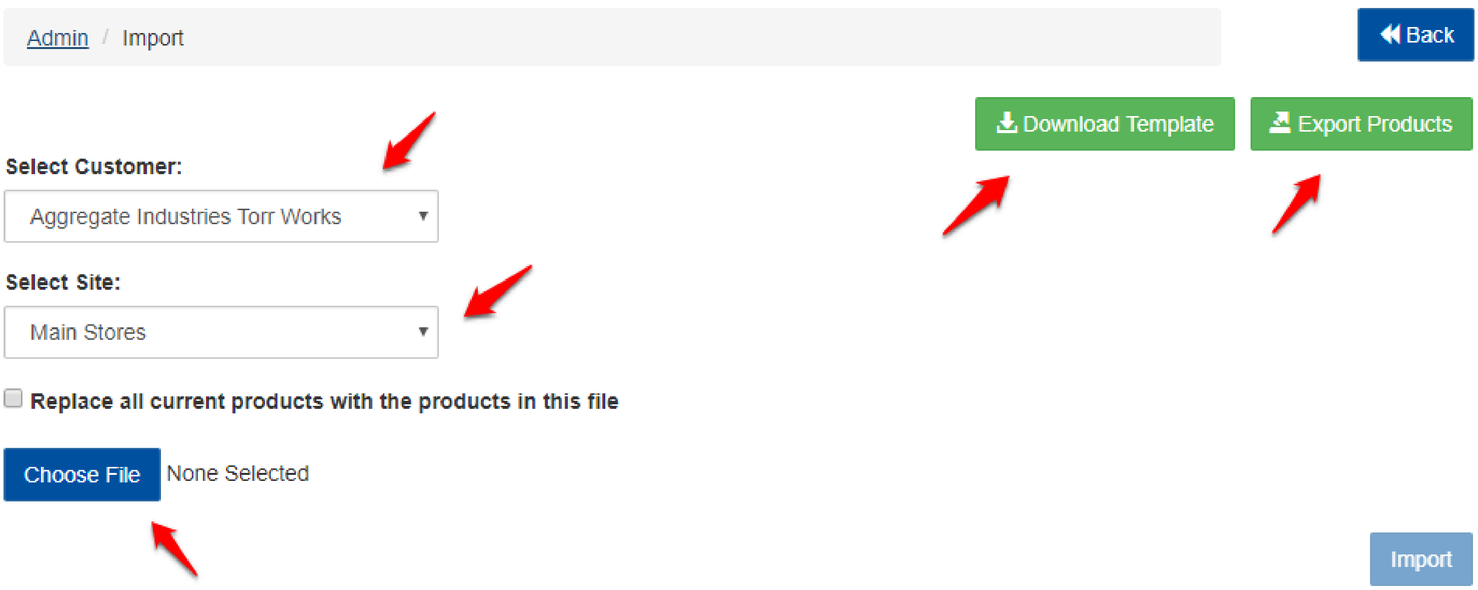
Platform	Download
Android	Test

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:



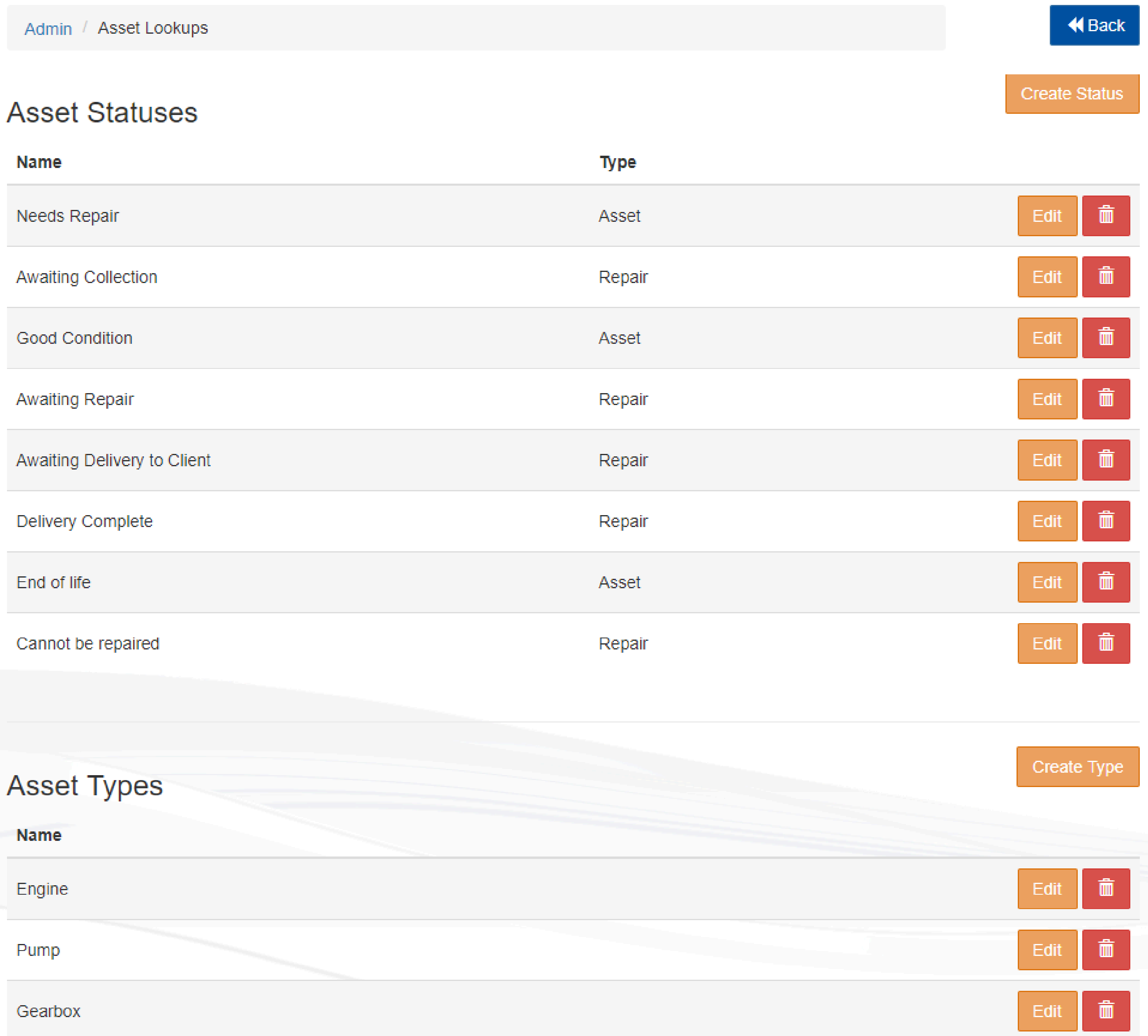
Within this screen, the notable features are:

- **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:



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

Asset Statuses

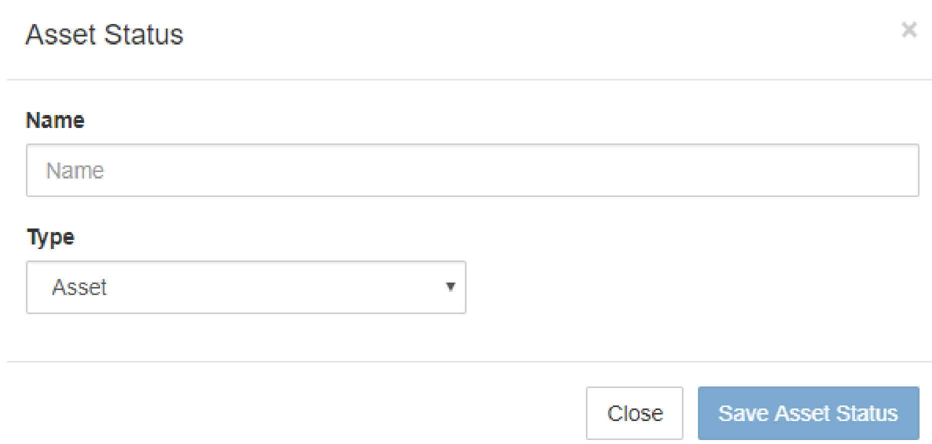
Within the Asset Status section, you can see any statuses that have been created for either an asset or repair. These correspond to the statuses you can change assets and repairs to within the AMS Asset Tracker.

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:

This will generate the following pop-up dialog:



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

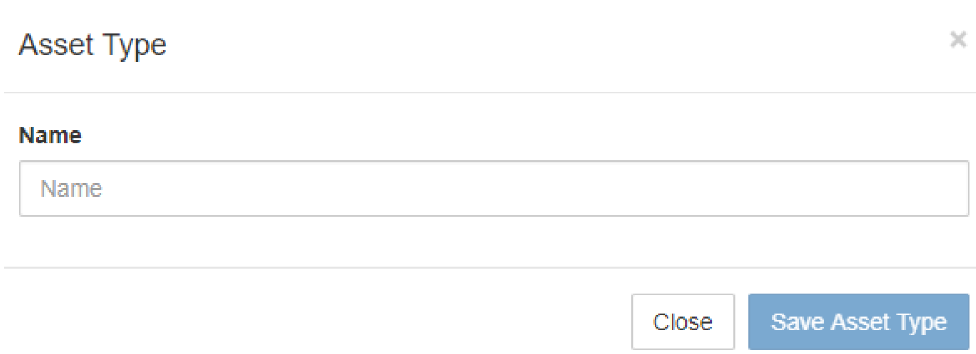
Within the 'Asset Types' section you can see the names of types of assets that have been created. These correspond to the asset type you can select when creating an asset within the AMS Asset Tracker.

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:



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.

==
Hayley User levels + associated permissions:
==

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)

====================
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