

The Zway Manual





About Us

Zway is an Online Business Productivity SaaS, that makes running your business easy.

At Zway we understand that you want to be a successful business competing with the big dogs. In order to do that, you need to be able to run your business effectively with ease from anywhere.

We understand the importance of having that extra time to spend with family rather than on your business which is why we automate your business management structure to allow a journey of ease, organisation and free time with your kids.



TABLE OF CONTENTS



- 2. LOGIN
- 3. SYSTEM SET UP
- 4. SIGNING UP
- 7. SETTING UP YOUR SYSTEM
- 23. CRM
- 36. E-HR
- 38. HOLIDAY MANAGER
- 39. ORGANISATION CHARTS
- 40. TIMESHEETS
- 41. EXPENSES
- 44. SERVICE DESKS
- 49. ASSETS
- 51. CONTRACTS
- 54. PROJECTS
- 57. RESOURCES
- 61. STOCK MANAGER



Login

To login to the desktop application go to:
www.app.zwayonline.com

Click on the login button.
You will need to enter your email address as the user name and a password.

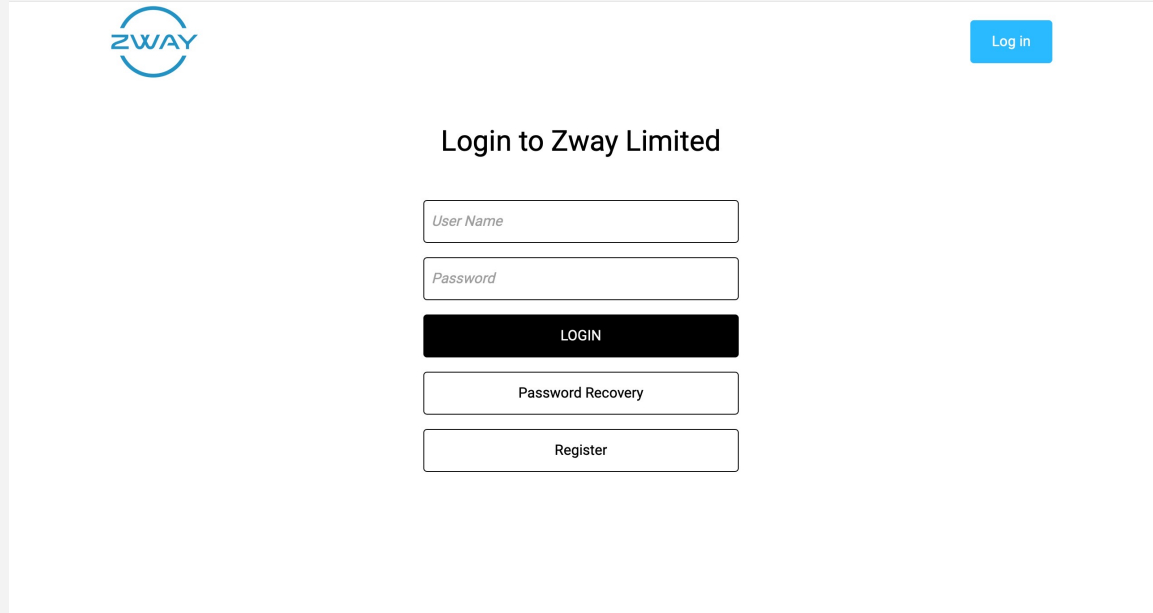
Your password needs to include:

At least

- 1 upper case
- 1 lower case
- 1 number
- 1 special character (!@£\$% etc.)

Overall at least 6 digits

This will take you to the home screen.



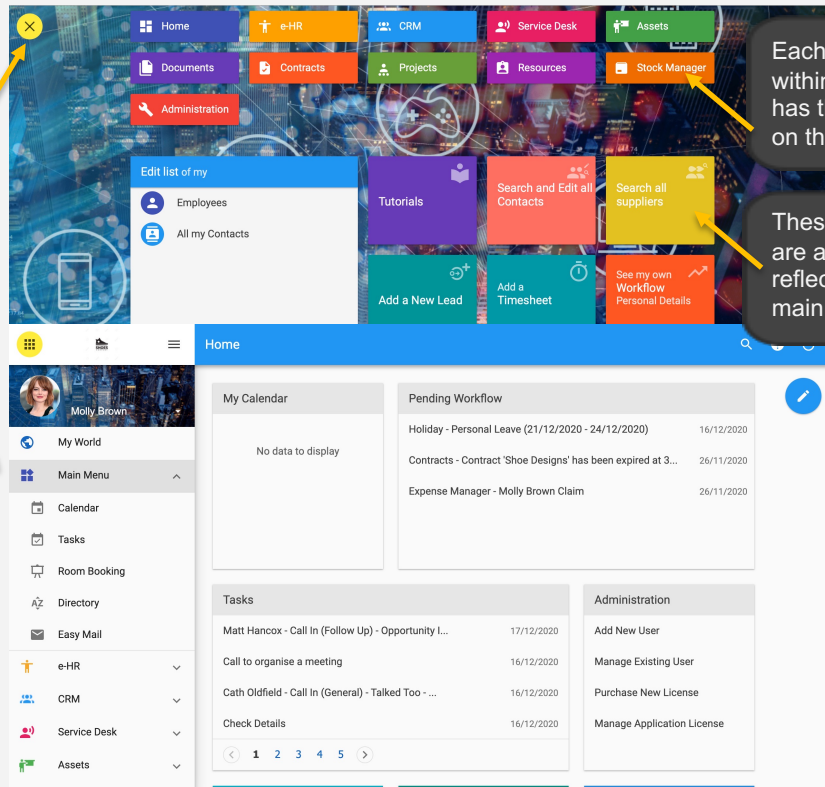


System Setup

The System Layout

The layout is the same across any function you choose.

This 'X', in the top left-hand corner, takes you from the application main screen to a personalised home screen.



Each application, within the system, has their own box on the home screen.

These larger boxes are actions, reflective of the main applications

| My Calendar | | Pending Workflow | |
|--|------------|--|------------|
| No data to display | | Holiday - Personal Leave (21/12/2020 - 24/12/2020) | 16/12/2020 |
| | | Contracts - Contract 'Shoe Designs' has been expired at 3... | 26/11/2020 |
| | | Expense Manager - Molly Brown Claim | 26/11/2020 |
| Tasks | | Administration | |
| Matt Hancox - Call In (Follow Up) - Opportunity I... | 17/12/2020 | Add New User | |
| Call to organise a meeting | 16/12/2020 | Manage Existing User | |
| Cath Oldfield - Call In (General) - Talked Too - ... | 16/12/2020 | Purchase New License | |
| Check Details | 16/12/2020 | Manage Application License | |



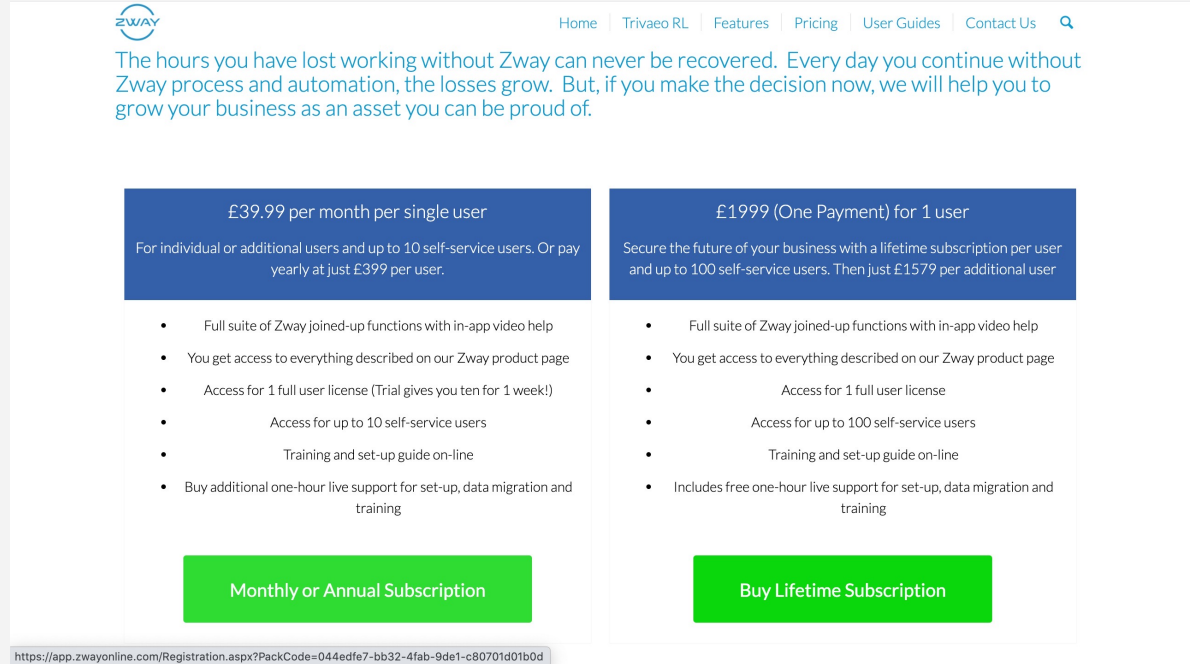
Signing Up

Registering For An Account

Signing up for Zway can be done from the website: www.zwayonline.com

Click the pricing tab along the top right.

Select which package would suit your business best.



The screenshot shows the Zway website's pricing page. At the top, there is a navigation bar with the ZWAY logo, links for Home, Trivaeo RL, Features, Pricing, User Guides, and Contact Us, and a search icon. Below the navigation bar is a main heading: "The hours you have lost working without Zway can never be recovered. Every day you continue without Zway process and automation, the losses grow. But, if you make the decision now, we will help you to grow your business as an asset you can be proud of." There are two pricing cards. The left card is titled "£39.99 per month per single user" and includes details for individual or additional users and up to 10 self-service users. The right card is titled "£1999 (One Payment) for 1 user" and includes details for a lifetime subscription per user and up to 100 self-service users. Both cards list features such as full suite of Zway functions, access to product page, user licenses, training, and live support. At the bottom of each card is a green button: "Monthly or Annual Subscription" and "Buy Lifetime Subscription". At the very bottom of the screenshot, a URL is visible: https://app.zwayonline.com/Registration.aspx?PackCode=044edfe7-bb32-4fab-9de1-c80701d01b0d

Home | Trivaeo RL | Features | Pricing | User Guides | Contact Us

The hours you have lost working without Zway can never be recovered. Every day you continue without Zway process and automation, the losses grow. But, if you make the decision now, we will help you to grow your business as an asset you can be proud of.

£39.99 per month per single user

For individual or additional users and up to 10 self-service users. Or pay yearly at just £399 per user.

- Full suite of Zway joined-up functions with in-app video help
- You get access to everything described on our Zway product page
- Access for 1 full user license (Trial gives you ten for 1 week!)
- Access for up to 10 self-service users
- Training and set-up guide on-line
- Buy additional one-hour live support for set-up, data migration and training

Monthly or Annual Subscription

£1999 (One Payment) for 1 user

Secure the future of your business with a lifetime subscription per user and up to 100 self-service users. Then just £1579 per additional user

- Full suite of Zway joined-up functions with in-app video help
- You get access to everything described on our Zway product page
- Access for 1 full user license
- Access for up to 100 self-service users
- Training and set-up guide on-line
- Includes free one-hour live support for set-up, data migration and training

Buy Lifetime Subscription

<https://app.zwayonline.com/Registration.aspx?PackCode=044edfe7-bb32-4fab-9de1-c80701d01b0d>



Signing Up

Setting Up Your Platform *Signing up and Logging In*

Signing up for Zway can be done from the website: www.zwayonline.com

Enter the basic information required:

- Company Name
- First & Last Name
- Email
- Contact Number
- Country
- State/County

This will send an email through for you to activate your Zway account.

Most Popular

Standard Zway Package

Monthly Price £47.00
Annual Price £470.00

This is the place to start - Whichever package you eventually choose.

Everyone gets to try before they buy. Click here and get going - fast!

The trial will give you up to 10 licenses for you to give to your colleagues. So, you can collaborate and build beautiful processes between you.

Put your own information onto the forms provided

You can import information from any spreadsheet format, so, quick and easy to do.

About You

Signing up requires no commitment and no credit card to get started. On completion of the sign-up process you will be able to start using the solution immediately.

Company Name

First Name

Last Name

Email

Contact Number

Country

State/County

I'm not a robot

Dear Molly Brown

Thank you for joining Zway, the online productivity suite for smaller businesses.

[Activate Zway](#)

You can sign in anytime using this [link](#). Please save it to your favourites: <https://app.zwayonline.com/Login.aspx>



Signing Up

Setting Up Your Platform

User Activation

Once you have activated your Zway account through email, you will be taken to complete the User Activation.

Create a password, making sure to include:

1 Uppercase

1 Lowercase

1 Number

And 1 Special Character (£\$%@)

The create a security question for an additional layer of security/certainty.

The screenshot shows the ZWAY User Activation page. At the top left is the ZWAY logo, and at the top right is a blue 'Log in' button. The main heading is 'User Activation'. Below this are four input fields: 'New Password', 'Confirm New Password', 'Security Question' (a dropdown menu), and 'Answer to the Security Question'. At the bottom of the form is a black 'OK' button.

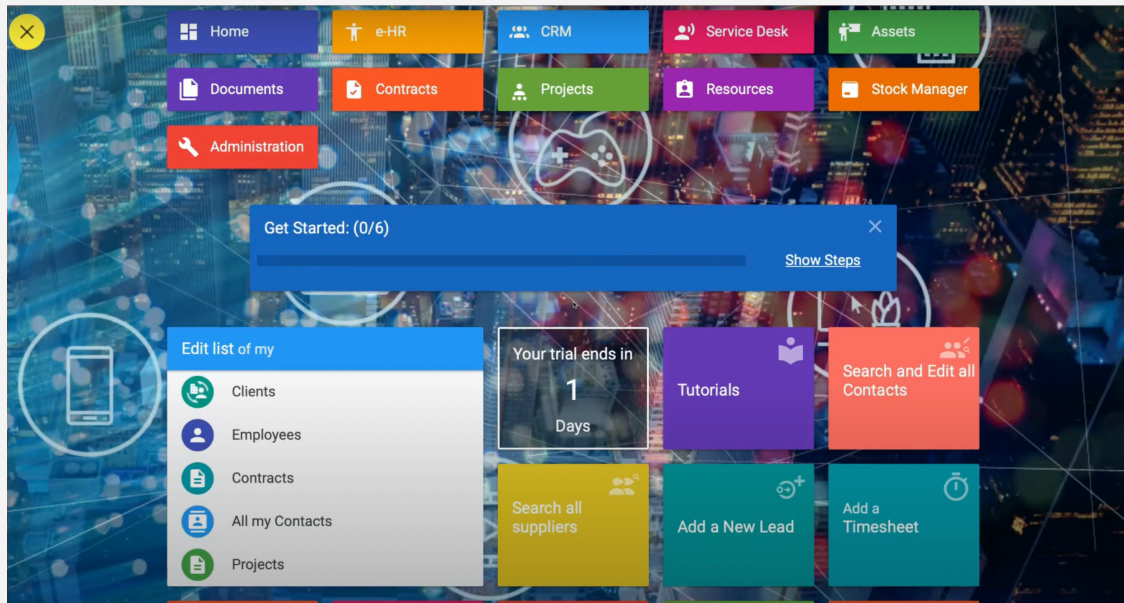


System Setup

Setting Up Your Platform *System Layout*

In addition to the standard boxes on the home screen, on your first time logging in, There are two other boxes to make note of:

- 1. Get Started:** A set of 7 actions that guide you through starting up your platform
- 2. Trial Countdown:** The number of days left on your trial before payments start.





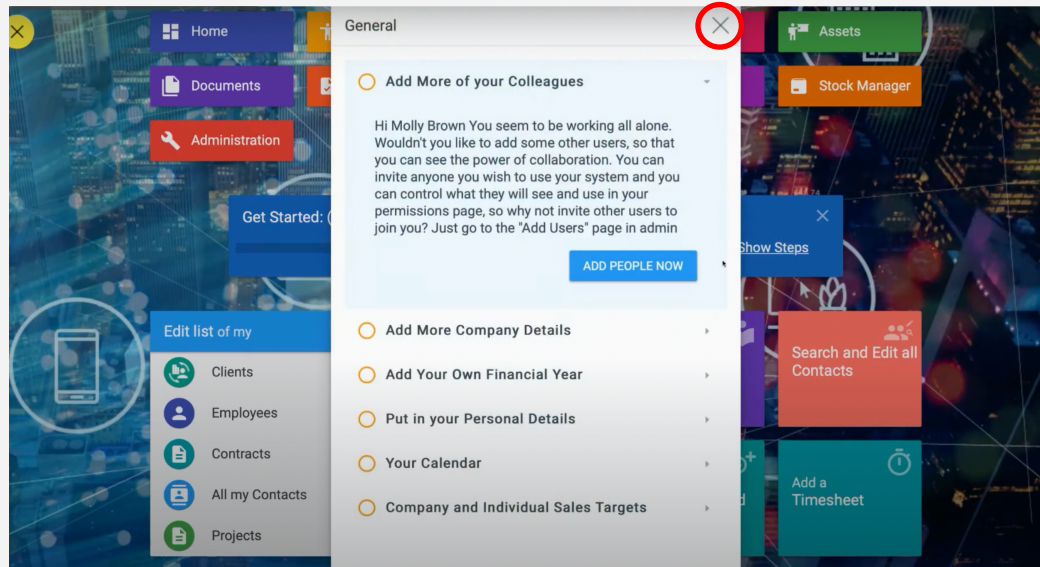
System Setup

Setting Up Your Platform Get Started Steps

The six steps your Get Started panel takes you through are:

1. **Add Colleagues**
2. **Add Company Details**
3. **Add Financial Year**
4. **Put In Your Personal Details**
5. **Set Up Your Calendar**
6. **Add Company/Individual Targets**

By clicking the "X" in the top right corner, you can accept all defaults and be rid of the guide.





System Setup

Getting Started

1. Adding More Colleagues

From the Get Started Tab, under the Add More Colleagues drop down, click Add People Now.

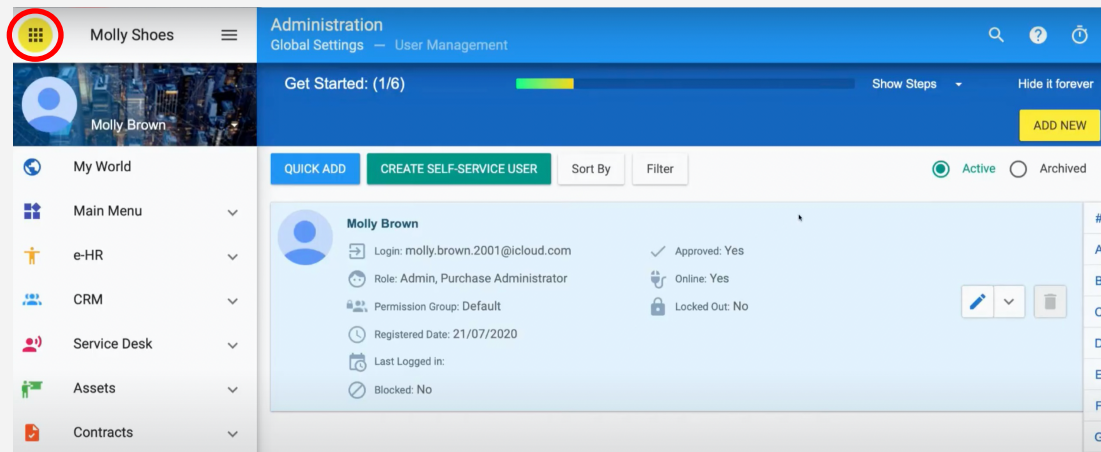
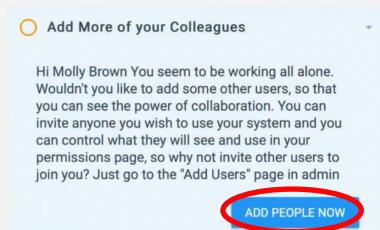
From the User Management screen, click the yellow add new button.

Fill in all information (i.e. First & Last Name, Contact Details, Employee Status etc.)

All pink boxes on the form are mandatory

Once complete, scroll to the bottom and click OK to save.

Navigate back to the main home screen by clicking the yellow circle in the top left hand corner of the screen.





System Setup

Getting Started

2. Add Company Details

From the Get Started Tab, under the Add Company Details drop down, click Add Company Details Now.

On the My Company page, click the yellow Edit Details Button.

Edit all details
(i.e. Company Name, Number, Address, Website, Profile Picture etc.)

All pink boxes on the form are mandatory.

Once complete, scroll to the bottom and click OK to save.

Add More Company Details


Setting up your company details now will save you time later. The information you enter here will help us to compile your reports, quotes, invoices, so that they look really cool and are personalised to your company. Give it a try by going to Admin / My Company. Don't forget to add your locations as well!

[ADD COMPANY DETAILS NOW](#)


[?](#)
[🔍](#)

Administration
My Company

[EDIT DETAILS](#)



- [My World](#)
- [Main Menu](#)
- [e-HR](#)
- [CRM](#)
- [Service Desk](#)
- [Assets](#)
- [Documents](#)
- [Contracts](#)
- [Projects](#)
- [Resources](#)
- [Stock Manager](#)



| | |
|---------------------|----------------------------------|
| Company | Molly's Shoes |
| Registration Number | |
| Tax ID | |
| Company Phone | 07904792901 |
| Mobile Phone | |
| Fax | |
| Employees | |
| Subdomain | mollyshoes-30 |
| Time Zone | (UTC) Coordinated Universal Time |
| Country | United Kingdom (UK) |
| State / County | Buckinghamshire |
| City | Milton Keynes |
| Postcode | |



System Setup

Getting Started

3. Add Your Financial Year

From the Get Started Tab, under the Add your financial year drop down, click the blue 'Yes' button.

As a default in the system, the financial year is always set from Jan 1st to De 31st.

If you wish to change this, click the pencil icon at the end of the row.

Change the dates and details

Then click OK to save.

○ Add Your Own Financial Year

All of your reports etc will follow the company year end that you enter here. It's best to do it now!

[YES, COME ON!](#)

Administration
Global Settings — Company Financial Year and Target

[ADD NEW](#)

| Year Start | Year End | Start Point Value | Annual Target | | |
|------------|------------|-------------------|---------------|--|--|
| 01/01/2020 | 31/12/2020 | £0.00 | £1,000,000.00 | | |
| 01/01/2021 | 31/12/2021 | £0.00 | £1,000,000.00 | | |
| 01/01/2022 | 31/12/2022 | £0.00 | £10,000.00 | | |



System Setup

Getting Started

4. Add Personal Details

From the Get Started Tab, under the Add your personal details drop down, click Add Them Now.

In the My World Application, under My Details you can add additional information.

Click the blue Edit button, in the top right hand.

Fill out all additional information (i.e. Job Title, Status, Department etc.)

Once complete, scroll to the bottom and click Save.

Put in your Personal Details

Hi Molly Brown It would be great if you are able to enter some basic information about yourself and your system can then use it to auto fill fields in forms for you later. This is a great way of saving time later. You can even upload your photo here, so all of your colleagues can see how nice you really are.

[ADD THEM NOW](#)

The screenshot shows the 'My World' user profile page. At the top, there is a navigation bar with a search icon, a help icon, and a refresh icon. Below the navigation bar, there is a header section with a profile picture of Molly Brown and the name 'Molly Brown'. To the right of the profile picture are buttons for 'VIEW ORG CHART', 'EDIT', and 'CHANGE SECURITY'. Below the header, there is a list of application categories on the left and a form for personal details on the right.

Application Categories:

- MY WORKFLOW
- MY REQUESTS
- MY DETAILS
- MY COMPANY
- MY DOCUMENTS
- MY HOLIDAYS
- MY TIMESHEETS
- MY EXPENSES
- MY PROJECTS

Personal Details Form:

- First Name: Molly
- Last Name: Brown
- Job Title: Business Owner
- Email: molly.brown.zway@gmail.com
- Status: Permanent
- Department: Executive
- Company: Molly's Shoes
- e-Signature:
- Address: 10 Eskdale Way, Broughton Milton Keynes MK10 United Kingdom (...)
- Year Period:
- Start Point:



System Setup

Getting Started

5. Set Permission Groups

From the Get Started Tab, under the 'Set, who can see what' drop down, click Set Permissions Now.

Click the yellow Add button in the top right hand.

This brings up a form where you can select the different applications that users in the group, will be able to access.

Once you have checked all the appropriate boxes, scroll to the bottom and press OK.

You can now assign users to this group.

Set, Who Can See What

As the main Administrator of your system, you can control who gets to see and use what information. Setting up Permission groups is really easy and just needs you to tick a few boxes. Make sure you have the groups you need here and then just add users to the permissions you have granted them.

[SET PERMISSIONS NOW](#)

Administration
Global Settings — Permission Groups

[ADD](#)

| Default | Name | Role | | |
|-------------------------------------|--------------|--------------|----------------------|------------------------|
| <input checked="" type="checkbox"/> | Default | User | Edit | Delete |
| <input checked="" type="checkbox"/> | Self-Service | Self-Service | Edit | Delete |
| <input type="checkbox"/> | Example | User | Edit | Delete |



System Setup

Getting Started

5. Add Users to Permission Groups

To assign a User to a Permission Group; in the left hand navigation click Settings.

From the drop down click Global Settings

Under the User Management section, click 'User Management'

From the list of employee, identify the user you want to add to a permission group.

Click the pencil icon at the end of the row. This opens up the user information for you to edit.

From here you can select the group you want to attach this user to.

Once done, click OK

The screenshot displays the ZWAY Administration interface. The top navigation bar includes 'Administration', 'Global Settings', and 'User Management'. A left-hand navigation menu lists various system components like 'My World', 'Main Menu', 'e-HR', 'CRM', 'Service Desk', 'Assets', 'Documents', 'Contracts', 'Projects', 'Resources', and 'Stock Manager'. The main content area shows a list of users, with the 'User Edit' dialog box open for user 'Cath Oldfield'. The dialog box contains the following fields: Contact (Cath Oldfield), First Name (Cath), Last Name (Oldfield), Company (Bolton Limited), Email (coldfield@bolton.net), and Permission Group (Self-Service). The dialog box also features 'OK' and 'CANCEL' buttons. Below the dialog box, the user's profile information is visible, including 'Registered Date: 14/12/2020', 'Last Logged in:', and 'Blocked: No'.



System Setup

Getting Started

6. Set Up Your Calendar

From the Get Started Tab, under the Your Calendar drop down, click the blue 'Add It Here' button.

Here you can name your calendar and set your working hours for the days of the week.

As a default working hours will be set as the standard 9 to 5.

To change this click edit and make the necessary edits.

Click OK to save all adjustments.

Your Calendar

We have already set up a working calendar for your company, but if you have particular working hours or holiday requirements, you might want to add them. This is particularly important if you are using time sheets or holidays management solutions.

[ADD IT HERE](#)

Administration
Global Settings — Working Calendar — Standard

Molly Brown

- My World
- Main Menu
- e-HR
- CRM
- Service Desk
- Assets
- Documents
- Contracts
- Projects
- Resources
- Stock Manager

Standard

January 2022

| Mon | Tue | Wed | Thu | Fri | Sat | Sun |
|-----|-----|-----|-----|-----|-----|-----|
| 27 | 28 | 29 | 30 | 31 | 1 | 2 |
| 3 | 4 | 5 | 6 | 7 | 8 | 9 |
| 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| 17 | 18 | 19 | 20 | 21 | 22 | 23 |
| 24 | 25 | 26 | 27 | 28 | 29 | 30 |
| 31 | 1 | 2 | 3 | 4 | 5 | 6 |

Working times for 27 January:
07:00 - 19:00
Based on:
Default work week on calendar "Standard"

WORKING WEEK EXCEPTIONS HISTORY

| Day | Working Hours | Edit | Delete |
|-----------|---------------|------|--------|
| Monday | 07:00 - 19:00 | | |
| Tuesday | 07:00 - 19:00 | | |
| Wednesday | 07:00 - 19:00 | | |
| Thursday | 07:00 - 19:00 | | |
| Friday | 07:00 - 19:00 | | |

[+ Add](#)

[EDIT](#)



System Setup

Getting Started

7. Setting Goals

From the Get Started Tab, under the Company and Individual Sales Targets drop down, click the blue 'Light Up Your Desktop' button.

As a default the financial year is set from January 1st to December 31st.

To edit this click the pencil icon at the end of the row

Once you have adjusted the financial year to fit your business and adjusted your annual target, click OK to save.

Company and Individual Sales Targets

The widget reports on your desktop will "light up" if you set targets. Then they will show you how you are doing in real time.

LIGHT UP YOUR DESKTOP

Administration
Global Settings — Company Financial Year and Target

ADD NEW

| Year Start | Year End | Start Point Value | Annual Target |
|------------|------------|-------------------|---------------|
| 01/01/2020 | 31/12/2020 | £0.00 | £1,000,000.00 |

Edit Financial Year

Year Start: 01/01/2020

Year End: 31/12/2020

Start Point Value: 0.00

Annual Target: 1,000,000.00

OK CANCEL



System Setup

Adding Contacts

Adding them Individually

In the left hand navigation, click CRM.
From the drop down this produces, click Contacts.

Adding contacts can be done individually or in mass.

To add a new contact individually, click the yellow Add New Button in the top right hand.

Fill in all the details on the form
i.e. salutation, name, address etc.

Once done click OK to save.

The screenshot displays the CRM Contacts interface. On the left is a navigation menu with options: My World, Main Menu, e-HR, CRM (selected), Contacts, Companies, Clients, Suppliers, Leads, Opportunities, and Quotes. The main area shows the CRM Contacts page with a header for 'Molly Brown' and an 'ADD NEW' button. Below the header are filters for 'Quick Add' and 'Filter', and buttons for 'IMPORT' and 'EXPORT ALL'. There are also dropdowns for 'Group' (set to 'All') and 'Owner' (set to 'All'). The main content is a table of contacts with columns for Name, Email, and Phone, and a list of letters (A-L) on the right for filtering.

| | Name | Email | Phone | # |
|--------------------------|-----------------|-----------------------------|-------|---|
| <input type="checkbox"/> | Alan Nicols | anic@abacus.com | | A |
| <input type="checkbox"/> | Cath Oldfield | coldfield@bolton.net | | B |
| <input type="checkbox"/> | Danilo Brandon | dan@jls.com | | C |
| <input type="checkbox"/> | Eddie Webb | ewebb@kirke.com | | D |
| <input type="checkbox"/> | Elizabeth White | elizabeth.white@gmail.com | | E |
| <input type="checkbox"/> | Greg Smith | | | F |
| <input type="checkbox"/> | Harold Stiles | haroldstiles90@gmail.com.uk | | G |
| <input type="checkbox"/> | Jamee Dunn | jdunn@experi.com | | H |
| <input type="checkbox"/> | John Smith | john.smith@thabora.com | | I |



System Setup

Adding Contacts

Adding them in Mass

To add new contacts in mass, click the green Import button in the top right hand.

From here you can upload a spreadsheet of all contact details.

These will be uploaded into the system within minutes.

The screenshot shows the CRM interface. On the left is a navigation menu with options: My World, Main Menu, e-HR, CRM (selected), Contacts, Companies, Clients, Suppliers, Leads, Opportunities, and Quotes. The main area is titled 'CRM Contacts' and features a search bar, a help icon, a refresh icon, and an 'ADD NEW' button. Below these are 'IMPORT' and 'EXPORT ALL' buttons. There are also dropdown menus for 'Group' (set to 'All') and 'Owner' (set to 'All'). A table of contacts is displayed with columns for Name, Email, and Phone. Each row includes a checkbox, a profile picture, the contact's name, email address, and a set of action icons (edit, dropdown, delete). A vertical index column on the right shows letters A through L.

| | Name | Email | Phone | # |
|--------------------------|-----------------|-----------------------------|-------|---|
| <input type="checkbox"/> | Alan Nicols | anic@abacus.com | | A |
| <input type="checkbox"/> | Cath Oldfield | coldfield@bolton.net | | B |
| <input type="checkbox"/> | Danilo Brandon | dan@jls.com | | C |
| <input type="checkbox"/> | Eddie Webb | ewebb@kirke.com | | D |
| <input type="checkbox"/> | Elizabeth White | elizabeth.white@gmail.com | | E |
| <input type="checkbox"/> | Greg Smith | | | F |
| <input type="checkbox"/> | Harold Stiles | haroldstiles90@gmail.com.uk | | G |
| <input type="checkbox"/> | Jamee Dunn | jdunn@experi.com | | H |
| <input type="checkbox"/> | John Smith | john.smith@thabora.com | | I |
| | | | | J |
| | | | | K |
| | | | | L |



System Setup

Adding Products

Adding them Individually

To add products, select Administration from the left hand navigation
From the drop down click Global Settings.

Under the Products/Services Tab click Product Catalog.

To add products individually click the yellow add new button in the top right hand

Fill in the information
i.e. Product Name, Units, Supplier etc.

When done, click OK to save

The screenshot shows the ZWAY Administration interface. The top navigation bar is blue and contains the text "Administration" and "Global Settings — Product Catalog". A yellow "ADD NEW" button is in the top right corner. Below the navigation bar, there are radio buttons for "Product" (selected), "Value-based Service", and "Time-based Service", along with an "IMPORT" button. The main content area displays a list of products with the following details:

| Product Name | Category | Units | Pack size | Cost | Adj. Price | MSRP | Supplier | Provider |
|------------------|-------------|----------------|-----------|------------|------------|------|----------|-------------|
| Air Gordons Pro | General | 4 Boxes | 10 | £5.26 | £26.05 | | Jabil | Our Company |
| Bingo Hall Kiosk | Mot 1.8G FP | Each Item Cost | 1 | £13,000.00 | £40,080.00 | | Jabil | Our Company |
| Checkboard Vans | Mot 1.8G FP | | 10 | £5.26 | | | Jabil | Provider: |

The left navigation menu includes: My World, Main Menu, e-HR, CRM, Service Desk, Assets, Documents, Contracts, Projects, Resources, and Stock Manager. The top left corner shows a user profile for Molly Brown.



System Setup

Adding Products

Adding them in Mass

To add products in mass click the green import button in the top right hand.

From here you can upload a spreadsheet of all products and their details.

These will be uploaded into the system within minutes.

The screenshot shows the ZWAY Administration interface. The top navigation bar includes 'Administration', 'Global Settings', and 'Product Catalog'. A sidebar on the left lists various system components. The main area displays a list of products with the following details:

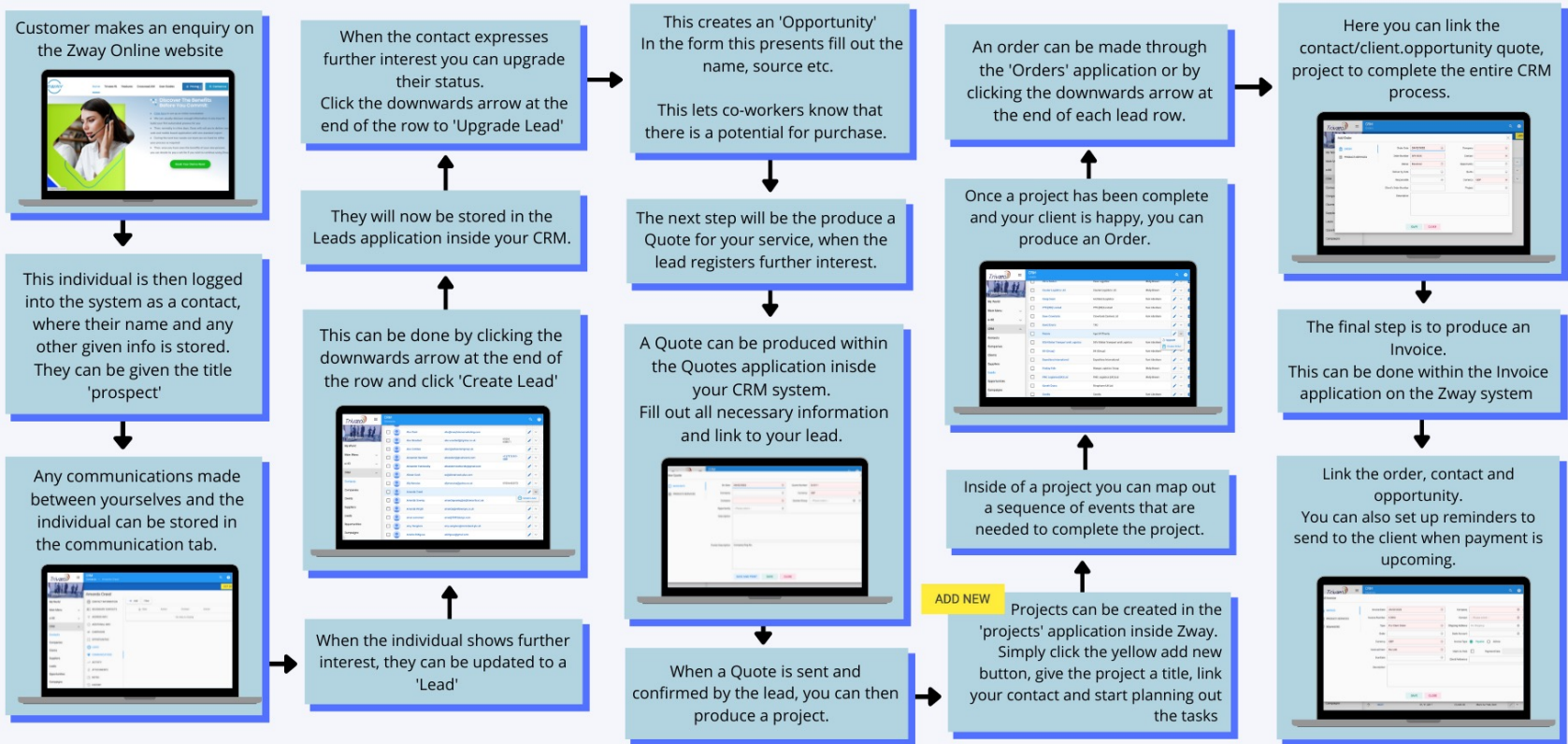
| Product Name | SKU | Category | Units | Pack size | Cost | Adj. Price | MSRP | Supplier | Provider |
|------------------|--------------|-------------|----------------|-----------|------------|------------|------|----------|-------------|
| Air Gordons Pro | MFT-2-4-F-F | General | 4 Boxes | 10 | £5.26 | £26.05 | | Jabil | Our Company |
| Bingo Hall Kiosk | MFT-2-7-F-F | Mot 1.8G FP | Each Item Cost | 1 | £13,000.00 | £40,080.00 | | Jabil | Our Company |
| Checkboard Vans | MFT-2-10-F-F | Mot 1.8G FP | | 10 | £5.26 | | | Jabil | |



The CRM System

How to set up and use your CRM system in Zway

CRM PROCESS





CRM System

Adding Companies

Adding them Individually

To add a new company, from the left hand navigation click CRM.
From the drop down click Companies

To add them individually, click the yellow add new button in the top right hand.

Fill in all the details on the form
i.e. company name, company type,
financial year etc.

Once done click OK to save.

The screenshot shows the CRM 'Companies' interface. On the left is a navigation menu with 'CRM' selected. The main area displays a table of companies with columns for Company Name and Phone. A top right bar contains an 'ADD NEW' button and filters for Group, Owner, and Account Type.

| | Company Name | Phone | | | # |
|--------------------------|---------------------|----------------|--|--|---|
| <input type="checkbox"/> | Abacus Limited | +442087654321 | | | A |
| <input type="checkbox"/> | Bolton Limited | +4420765409876 | | | B |
| <input type="checkbox"/> | Carlton Limited | +44203498765 | | | C |
| <input type="checkbox"/> | DoitConsult Limited | +441980876432 | | | D |
| <input type="checkbox"/> | Everyman Limited | +4444439876545 | | | E |
| <input type="checkbox"/> | Fabrics 4 U | 07801 765463 | | | F |
| <input type="checkbox"/> | Firefox Limited | +441519876709 | | | G |
| <input type="checkbox"/> | Gammatech | +44 9087538764 | | | H |
| | | | | | I |
| | | | | | J |
| | | | | | K |



CRM System

Adding Companies

Adding them in Mass

To add new companies in mass, click the green Import button in the top right hand.

From here you can upload a spreadsheet of all companies and their details.

These will be uploaded into the system within minutes.

The screenshot shows the CRM system interface. On the left is a navigation menu with options: My World, Main Menu, e-HR, CRM (selected), Contacts, Companies, Clients, Suppliers, Leads, Opportunities, and Quotes. The main area is titled 'CRM Companies' and features a top right 'ADD NEW' button and a green 'IMPORT' button. Below these are filters for Group, Owner, and Account Type, all set to 'All'. A table lists companies with columns for Company Name and Phone. Each row includes a checkbox, a company icon, the name, the phone number, and edit/delete icons.

| | Company Name | Phone | # |
|--------------------------|---------------------|----------------|---|
| <input type="checkbox"/> | Abacus Limited | +442087654321 | A |
| <input type="checkbox"/> | Bolton Limited | +4420765409876 | B |
| <input type="checkbox"/> | Carlton Limited | +44203498765 | C |
| <input type="checkbox"/> | DoitConsult Limited | +441980876432 | D |
| <input type="checkbox"/> | Everyman Limited | +4444439876545 | E |
| <input type="checkbox"/> | Fabrics 4 U | 07801 765463 | F |
| <input type="checkbox"/> | Firefox Limited | +441519876709 | G |
| <input type="checkbox"/> | Gammatech | +44 9087538764 | H |
| | | | I |
| | | | J |
| | | | K |



CRM System

Adding Clients

Clients can then be add and attached to companies within the system.

To add Clients, from the left hand navigation click CRM.

From the drop down click Clients.

Here there are 2 green buttons in the top right hand:

- 1.Import Individual Clients** – Those not attached to a company in the system
- 2.Import Company Clients** –Those you want attached to a company in the system

With both features you can import a spreadsheet of client’s information.

They will then be uploaded into the system, with relevant links to companies where needed.

The screenshot shows the CRM Clients interface. On the left is a navigation menu with options: My World, Main Menu, e-HR, CRM (selected), Contacts, Companies, Clients, Suppliers, Leads, Opportunities, and Quotes. The main area displays a list of clients with columns for Name, Client Type, Account Type, and Phone. Two green buttons at the top right are labeled 'IMPORT INDIVIDUAL CLIENTS' and 'IMPORT COMPANY CLIENTS'.

| Name | Client Type | Account Type | Phone | | |
|-----------------|-------------|--------------|----------------|--|--|
| Abacus Limited | Company | Customer | +442087654321 | | |
| Alan Nicols | Contact | Customer | | | |
| Bolton Limited | Company | Customer | +4420765409876 | | |
| Carlton Limited | Company | Customer | +44203498765 | | |
| Cath Oldfield | Contact | Customer | | | |
| Danilo Brandon | Contact | Customer | | | |
| Eddie Webb | Contact | Customer | | | |
| IKEA | Company | Customer | | | |
| Jamee Dunn | Contact | Customer | | | |
| John Smith | Contact | Customer | | | |
| John Taylor | Contact | Customer | | | |



CRM System

Adding Suppliers

From the left hand navigation click CRM.
From the drop down click Suppliers

In the top right hand corner click the yellow add new button.

Select whether the supplier is a company or contact.
From here, fill out the information on the form
i.e. company name, website, contact details etc.
Once complete, click OK to save.

The screenshot shows the CRM interface with a left-hand navigation menu and a main content area displaying a list of suppliers.

Navigation Menu:

- My World
- Main Menu
- e-HR
- CRM** (Expanded)
- Contacts
- Companies
- Clients
- Suppliers
- Leads
- Opportunities
- Quotes

Suppliers List:

| Name | Supplier Type | Account Type | Phone | # |
|------------------------------------|---------------|--------------|--------------|---|
| Fabrics 4 U | Company | Supplier | 07801 765463 | A |
| Greglases | Company | Supplier | 07902 34561 | B |
| Herts Mechanical Handling Services | Company | Supplier | 01442 216669 | C |
| Shoe Protection | Company | Supplier | 01908 765219 | D |
| ShoeSouls | Company | Supplier | 01908 12345 | E |



When A Lead Come In

Adding A Lead

From the left hand navigation, click CRM
From the drop down this produces, click Leads.

To add a new lead, click the yellow Add New button.

Fill out the information on the form
i.e. Name, Where the source came from,
Product etc.

When done, click OK to save

You can also Import multiple leads by clicking
the green Import button

Here you can upload a spreadsheet of Lead
information.

The screenshot shows the CRM Leads interface. On the left is a navigation menu with options: My World, Main Menu, e-HR, CRM (selected), Contacts, Companies, Clients, Suppliers, Leads, Opportunities, and Quotes. The main area displays a table of leads with columns for Name, Company Name, Assigned, Product/Stock Item, and Created On. A dropdown menu is open over the first row, showing options: Upgrade, Create Order, and Create Omniscient Order. The 'ADD NEW' button is visible in the top right corner.

| Name | Company Name | Assigned | Product/Stock Item | Created On |
|----------------|-----------------------|---------------|--------------------|------------|
| Alan Nicols | Abacus Limited | | Tornado Car lift | 14/12/2020 |
| Cath Oldfield | Bolton Limited | David Claxton | Bingo Hall Kiosk | 1 |
| Danilo Brandon | JLS Tax Sites Limited | | Waterproof wax | 2 |
| Eddie Webb | Kirke Closer Ltd | Molly Brown | Care kit | 26/11/2020 |
| Harold Stiles | Fabrics 4 U | | | 26/11/2020 |
| Matt Hancox | | | Tornado Car lift | 16/12/2020 |



When A Lead Come In

When A Lead Makes An Order

After continued communication with a lead, through text or email form, the hope is for them to make an order.

You can create an order from the Leads application.

Click the small downwards arrow at the end of each row.

From the dropdown this produces, click Create Order.

Fill in the information on this form, the pink boxes are mandatory to complete.

These are: Order Date & Number, Status, Company, Contact and Currency.

Once done, click save.

The screenshot shows the CRM Leads application interface. On the left is a navigation menu with options: My World, Main Menu, e-HR, CRM (selected), Contacts, Companies, Clients, Suppliers, Leads, Opportunities, and Quotes. The main area displays a table of leads. The table has columns: Name, Company Name, Assigned, Product/Stock Item, and Created On. Each row has a checkbox, a dropdown arrow, and a plus icon. The table contains the following data:

| Name | Company Name | Assigned | Product/Stock Item | Created On |
|----------------|-----------------------|---------------|--------------------|------------|
| Alan Nicols | Abacus Limited | | Tornado Car lift | 14/12/2020 |
| Cath Oldfield | Bolton Limited | David Claxton | Bingo Hall Kiosk | 16/12/2020 |
| Danilo Brandon | JLS Tax Sites Limited | | Waterproof wax | 26/11/2020 |
| Eddie Webb | Kirke Closer Ltd | Molly Brown | Care kit | 26/11/2020 |
| Harold Stiles | Fabrics 4 U | | | 26/11/2020 |
| Matt Hancox | | | Tornado Car lift | 16/12/2020 |



When A Lead Come In

When A Lead Makes An Order

An order can also be made in the Orders application.

From the left hand navigation, click CRM.
From the drop down, click Orders.

(There is a toggle in the top right, to change between Client Orders or Stock Orders)

From here click the yellow Add New button to produce a New Order

Fill in the information on this form, the pink boxes are mandatory to complete.

These are: Order Date & Number, Status, Company, Contact and Currency

Once done, Click Save.

The screenshot shows the CRM Orders application interface. On the left is a navigation menu with options: My World, Main Menu, e-HR, CRM (selected), Contacts, Companies, Clients, Suppliers, Leads, Opportunities, and Quotes. The main area displays a table of orders with columns for Order No, Order Date, Sum, and Status. There are also filters for Active and Archived orders, and tabs for Client Orders and Stock Orders. A yellow 'ADD NEW' button is visible in the top right corner.

| Order No | Order Date | Sum | Status |
|----------|------------|------------|--------------------|
| WR-0002 | 26/11/2020 | £140.51 | Assigned |
| WR-0003 | 26/11/2020 | £84.60 | Received, Accepted |
| WR-0004 | 26/11/2020 | £80.99 | Assigned, Accepted |
| WR-0005 | 14/12/2020 | £114.46 | Received |
| WR-0015 | 16/12/2020 | £52,800.00 | Assigned, Accepted |



When A Lead Come In

Producing a Quote

A quote for the price of service can be produced within the system.

To produce a quote, click the CRM application in the left hand navigation. From the drop down this produces, click Quotes. This will produce a list of existing quotes within the system.

To produce a new quote, click the yellow add new button in the top right corner.

Fill out the information on the form i.e. Date, Quote Number, Contacts, Currency. (all the pink boxes are mandatory to complete)

You can link products using the second tab on this form.

When saving the form you have the option to simply save this to the system or save and print, for you to send to a customer.

The screenshot displays the 'New Quote' form within a CRM application. The form is divided into two tabs: 'MAIN INFO' and 'PRODUCT/SERVICES'. The 'MAIN INFO' tab is active and contains the following fields:

- On Date:** 01/02/2022
- Quote Number:** Q-0019
- Company:** (empty)
- Currency:** GBP
- Contacts:** (empty)
- Opportunity:** -- Please select --
- Description:** (empty text area)
- Footer Description:** Company Reg No. (empty text area)

At the bottom right of the form, there are three buttons: 'SAVE AND PRINT' (blue), 'SAVE' (teal), and 'CLOSE' (pink). The background shows the CRM application interface with a blue header and a left-hand navigation menu.



When A Lead Come In

Producing an Invoice

Once an order has been made, you need to produce an Invoice

From the left hand navigation click CRM, from the drop down this produces; click Invoices

In the top right hand corner click the yellow Add New button.

Fill in the information on this form, the pink boxes are mandatory to complete

These are: Invoice Date & Number, Type, Invoiced Item, Company & Contact.

Be sure to use the drop down to select the order you want to link the Invoice to

Once done, click Save.

The screenshot shows the CRM Invoices interface. On the left is a navigation menu with items: My World, Main Menu, e-HR, CRM (selected), Contacts, Companies, Clients, Suppliers, Leads, Opportunities, and Quotes. The top header is blue and contains 'CRM Invoices', search, help, and refresh icons, along with an 'ADD NEW' button. Below the header are filter options: Filter, Active (selected), and Archived. There are also radio buttons for Invoices (selected), Re-occurring Invoices, and Recurring Templates. The main area displays a table of invoices:

| ↑ Name | Invoice Date | Amount | Status | |
|----------|--------------|---------|--------|--|
| → I-0003 | 26/11/2020 | £19.04 | New | |
| → I-0004 | 26/11/2020 | £46.09 | New | |
| → I-0006 | 26/11/2020 | £9.46 | New | |
| → I-0007 | 26/11/2020 | £60.00 | New | |
| → I-0008 | 26/11/2020 | £48.00 | New | |
| → I-0009 | 26/11/2020 | £84.60 | New | |
| → I-0010 | 14/12/2020 | £57.23 | New | |
| → I-0011 | 14/12/2020 | £57.23 | New | |
| → I-0016 | 16/12/2020 | £405.00 | New | |
| → I-0017 | 16/12/2020 | £243.00 | New | |



When A Lead Come In

Mark An Invoice As Paid

When a customer /client pays the Invoice you need to update the status in the system.

Within the Invoice application, find the Invoice you want to update.

At the end of each row there is a small downwards arrow, click this to produce a dropdown list of actions.

Click Mark As Paid to update the status of the Invoice across the entire system.

From this list of actions you can also print a copy of the Invoice.

The screenshot shows the CRM Invoices application interface. On the left is a navigation sidebar with a user profile for Molly Brown and menu items: My World, Main Menu, e-HR, CRM, Contacts, Companies, Clients, Suppliers, Leads, Opportunities, and Quotes. The main area displays a table of invoices with columns for Name, Invoice Date, Amount, and Status. A dropdown menu is open over the first row (I-0003), showing options: Archive, Mark As Paid, and Print.

| Name | Invoice Date | Amount | Status |
|--------|--------------|---------|--------|
| I-0003 | 26/11/2020 | £19.04 | New |
| I-0004 | 26/11/2020 | £46.09 | New |
| I-0006 | 26/11/2020 | £9.46 | New |
| I-0007 | 26/11/2020 | £60.00 | New |
| I-0008 | 26/11/2020 | £48.00 | New |
| I-0009 | 26/11/2020 | £84.60 | New |
| I-0010 | 14/12/2020 | £57.23 | New |
| I-0011 | 14/12/2020 | £57.23 | New |
| I-0016 | 16/12/2020 | £405.00 | New |
| I-0017 | 16/12/2020 | £243.00 | New |



When A Lead Come In

Recorded Communications

Any communication with a client/customer, whether this is an email, phone call or any other method, will be recorded and stored in the communications History application.

To view and edit any of these click the CRM application in the left hand navigation. From the drop down this produces, click Communication History.

This produces a list view of all communications happening within this system.

To edit any of the contents, lick the date of entry at the top of each row.

The Pencil Icon at the end of each row allows you to add a summary of this communication.

The screenshot displays the CRM Communications History interface. On the left is a navigation menu with options: My World, Main Menu, e-HR, CRM (selected), Contacts, Companies, Clients, Suppliers, Leads, Opportunities, and Quotes. The main area shows a list of communication records. Each record includes a date (16/12/2020), a company name (Abacus Limited or IKEA), a contact name (Alan M Nicols or Matt Hancox), and an action (Email Out or Call In). A pencil icon is visible at the end of each row for editing.

| Sort By | Filter | Company | Contact |
|------------|--------|----------------|----------------------|
| | | -- All -- | -- All -- |
| 16/12/2020 | | Abacus Limited | Alan M Nicols |
| | | | Action: Email Out |
| 16/12/2020 | | Abacus Limited | Alan M Nicols |
| | | | Action: Email Out |
| 16/12/2020 | | IKEA | Matt Hancox |
| | | | Action: Call In |
| | | | Call Type: Follow Up |



Opportunities in CRM

Adding A New Opportunity

Any new business opportunity can be logged into the system.

Click the CRM application in the left hand navigation
From the drop down this produces, click Opportunities.

Click the yellow add new button, in the top right corner, to produce a new opportunity form.

Fill out all of the information on the form.
All pink boxes are mandatory to be filled before you are able to save.

Use the 6 tabs, on the left hand side of the form, to input even more information.

When done, click OK to save.

CRM Opportunities

Opportunity Add

- OPPORTUNITY INFO
- PRODUCT/SERVICES
- DESCRIPTION
- ADDITIONAL INFO
- HISTORY
- BILLING PROCESS

Opportunity Name

Number

Company

Contacts

Opportunity Status

Process Type

Terms / Days

Campaigns

Opportunity Source

Type

Est. Close Date

Close Type

Entry

Process

Stage

Probability

Currency

Is Private

OK CANCEL



The e-HR System

How to set up and use the e-HR application in Zway.



e-HR

Adding A New Employee

To add a new employee, click the e-HR application in the left hand navigation. From the drop down this produces, click Employee List.

Here you will see a full list view of all current employees.

To add a new employee click the yellow add new button in the top right hand corner.

Fill out the form of information. All of the pink boxes are mandatory i.e. first and last name.

There are an additional 5 tabs on the left hand side of the form to add more information such as an address and emergency contact.

When complete, click save.

The screenshot shows the Trivæo e-HR interface. The left-hand navigation menu includes: My World, Main Menu, e-HR (selected), Employees List (highlighted), Holiday Manager, Objectives, Company Organisation Chart, Timesheet, Expense Manager, Reports, and CRM. The main content area is titled 'e-HR Employees List' and features a search bar, a filter dropdown set to 'Active', and a location dropdown set to '-- All --'. A green 'IMPORT' button is visible. A yellow 'ADD' button is circled in red in the top right corner. Below the filters is a table of employees:

| ↑ Name | Email | Position | # |
|---------------------|--------------------------|------------------------------|---|
| Alex Moore | alex.moore@thaborg.com | Business Development Manager | A |
| David Claxton | david.claxton@trivæo.com | Chief Executive | B |
| Ihor Danylichenko | | QA Engineer | C |
| Iurii Mamchur | | DevOps Engineer | D |
| Ivan Parybus | | Front-end developer | E |
| Mykola Stimkovskiy | nico@trivæo.com | Internal Development Manager | F |
| Oleksiy Paraskevych | alex@trivæo.com | External Development Manager | G |
| Pat Graham | pat@trivæo.com | Chief Technology Officer | H |
| Stephen Pace | steve.pace@trivæo.com | Business Development Manager | I |



e-HR

Adding A New Employee

New employees can also be imported in bulk by clicking the green Import button in the top right.

Here you can upload a spreadsheet of all employees and their information.

They will then be uploaded into the system.

e-HR
Employees List

ADD

Filter: Active Not Active Location: -- All --

IMPORT

| Name | Email | Position | # |
|---------------------|---------------------------|------------------------------|---|
| Alex Moore | alex.moore@thaborg.com | Business Development Manager | A |
| David Claxton | david.claxton@trivaeo.com | Chief Executive | B |
| Ihor Danylichenko | | QA Engineer | C |
| Iurii Mamchur | | DevOps Engineer | D |
| Ivan Parybus | | Front-end developer | E |
| Mykola Stimkovskiy | nico@trivaeo.com | Internal Development Manager | F |
| Oleksiy Paraskevych | alex@trivaeo.com | External Development Manager | G |
| Pat Graham | pat@trivaeo.com | Chief Technology Officer | H |
| Stephen Pace | steve.pace@trivaeo.com | Business Development Manager | I |
| | | | J |
| | | | K |
| | | | L |
| | | | M |
| | | | N |
| | | | - |



e-HR

Company Org Charts

Display the entire company staff using the Company Org Charts in Zway.

Click e-HR from your left hand navigation. From the drop down this produces, click Company Organisation Chart.

Click the print button, in the top right corner to print a physical copy of you company org chart.

The screenshot shows the Trivæo e-HR interface. On the left is a navigation menu with the following items: My World, Main Menu, e-HR (selected), Employees List, Holiday Manager, Objectives, Company Organisation Chart, Timesheet, Expense Manager, Reports, and CRM. The main content area is titled 'e-HR Company Organisation Chart' and features a search bar with the text '-- All --'. The org chart structure is as follows:

- David Claxton, Chief Executive
 - Pat Graham, Chief Technology Officer
 - Mykola Stimkovskiy, Internal Development Manager
 - Oleksiy Paraskevych, External Development Manager
 - Alex Moore, Business Development Manager
 - Stephen Pace, Business Development Manager



e-HR

Time Sheets

To add a Timesheet for an additional hours worked,
Click e-HR from your left hand navigation.

From the drop down this produces, click Timesheet.

To add a new Timesheet click the yellow add new button in the top right hand.

Fill out the form.
All pink boxes are mandatory i.e. Employee, Date and Hours worked.

Link the Timesheet to a specific Project or Job by using the 2 tabs on the left hand side.

Once complete, click save.



e-HR

Expense Manager

To add an Expense,
Click e-HR from your left hand navigation.

From the drop down this produces, click
Expense Manager.

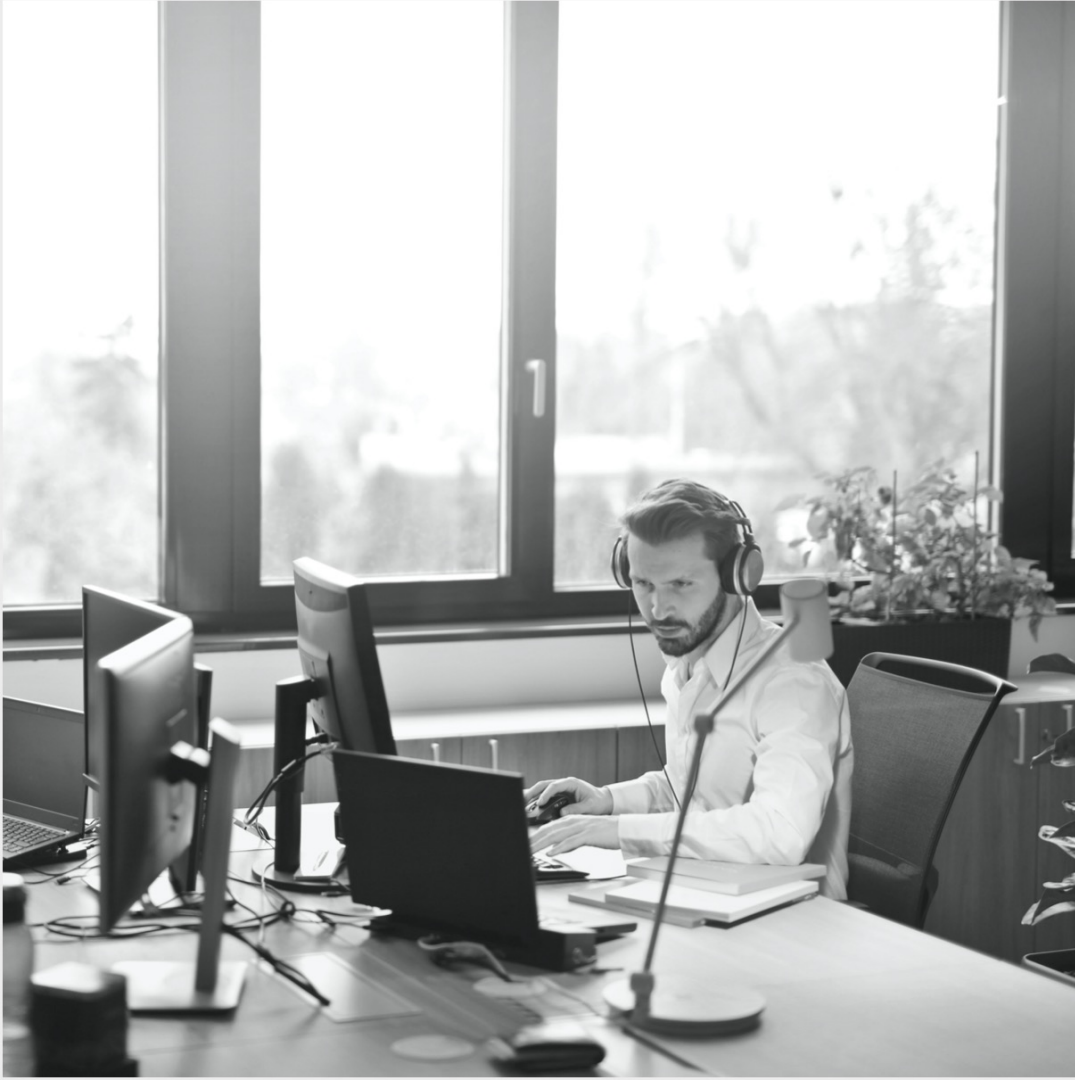
To add a new Expense click the yellow add
new button in the top right hand.

Fill out the form.
All pink boxes are mandatory i.e. Title,
Employee, Date and Currency.

Link the purchases in the Expenses tab on
the left.

Once complete, click save.

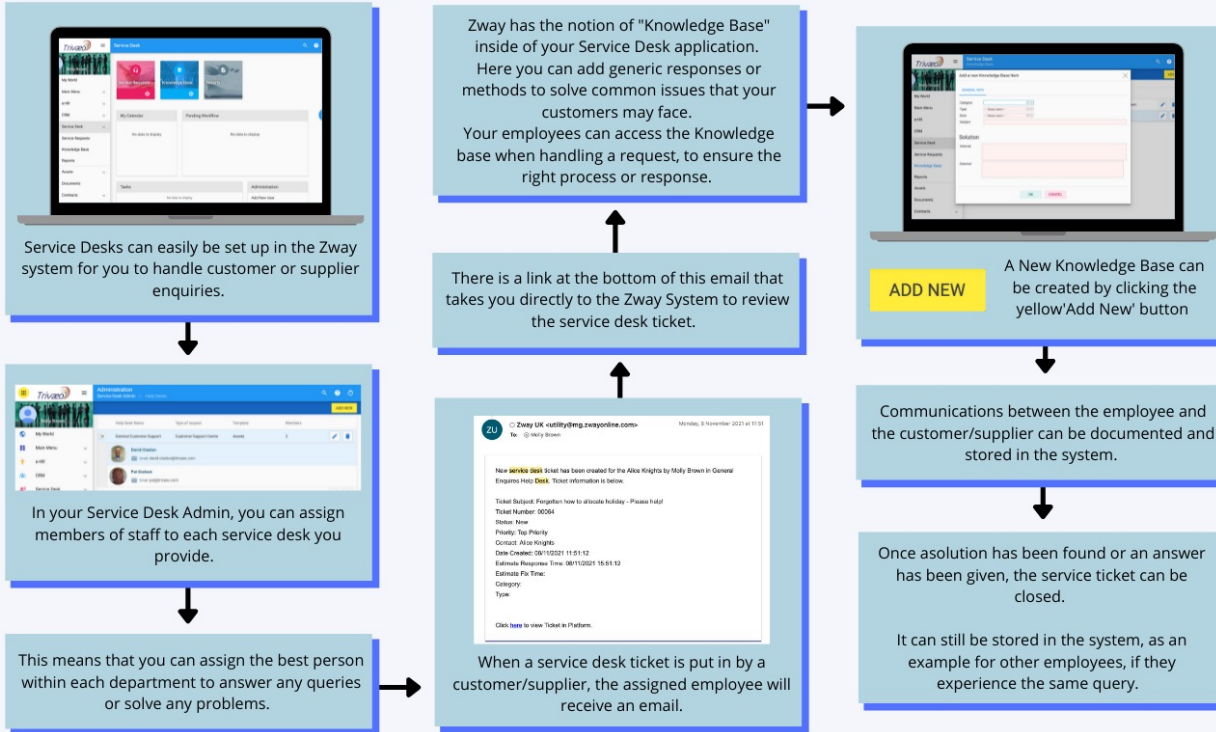
The screenshot shows the Trivæo e-HR Expense Manager interface. The top navigation bar is blue with the Trivæo logo and 'e-HR Expense Manager' text. A yellow 'ADD' button is in the top right. The left sidebar contains navigation items: My Work, Main Menu, e-HR (selected), Employment, Holiday, Objectives, Compensation Chart, Timesheet, Expenses, Reports, and CRM. The 'Add Claim' modal form is open, featuring a left-hand menu with 'CLAIM INFO' (selected) and 'EXPENSES'. The form fields include: Title (pink box), Employee (Molly Brown, pink box), On Date (09/03/2022, pink box), Currency (GBP, pink box), Project (- None -, dropdown), Task (dropdown), and Job (dropdown). A Description text area is at the bottom. 'SAVE' and 'CLOSE' buttons are at the bottom right.



Service Desks

How to set up and use the service desk in Zway

SERVICE DESK PROCESS





Service Desks

Setting Up A Service Desk

To first set up your service desk, click Administration from the left hand navigation bar.

From the drop down this produces, click Service Desk Admin.
From here, click Help Desks within the Administration box.

To create a new service desk, click the yellow add new button in the top right hand corner.

Fill out all of the information on the form i.e. name, Type etc.
All pink boxes are mandatory to be filled out in order to save the form.

Assign users to the service desk by clicking the Add New members button on the form

Once done, click OK to save

The screenshot shows the ZWAY Administration interface. The left navigation bar includes: My World, Main Menu, e-HR, CRM, Service Desk, Assets, Documents, Contracts, Projects, Resources, and Stock Manager. The main content area is titled 'Administration - Service Desk Admin - Help Desks' and features an 'ADD NEW' button. Below is a table of existing help desks:

| Help Desk Name | Type of request | Template | Members | |
|---------------------------|--------------------|-----------------------|---------|--|
| → Finance | Invoice | Finance Template | 2 | |
| → General Enquires | General | Requested Information | 1 | |
| → Sales | New Business | CRM Order | 2 | |
| → Service and Maintenance | Service and faults | IT | 3 | |



Service Desks

Service Requests

Any service request that comes into the system will be logged in the Service Requests Desk

To view and edit these Service Requests, click Service Desk from the left hand navigation. From the drop down this produces, click Service Requests.

Here you will see a list of service requests already being handled within the system.

To edit any of the current service requests, click the pencil icon at the end of each row.

To navigate through opened and archived service requests, use the two tabs in the top right hand of the table.

The screenshot shows the 'Service Desk' interface. On the left is a navigation menu with items: My World, Main Menu, e-HR, CRM, Service Desk (expanded), Service Requests, Knowledge Base, Reports, Assets, Documents, and Contracts. The 'Service Desk' header includes a search bar, help icon, and refresh icon. Below the header are tabs for 'OPENED' and 'ARCHIVED', and an 'ADD NEW' button. A table displays the following data:

| | Name | Status | Help Desk | Requester | Created | |
|--------------------------|---|--------|-------------------------|-----------------|------------------|--|
| <input type="checkbox"/> | 00065: Need help with holidays bookings! | New | General Enquires | Elizabeth White | 08/11/2021 11:58 | |
| <input type="checkbox"/> | 00056: Bingo hall Kiosk broken at Carlton | New | Service and Maintenance | Arthur Briggs | 15/12/2020 11:27 | |



Service Desks

Service Requests

To add a new service request click the yellow add new button in the top.

Fill in all of the information on the form i.e. Subject, Description, From Contact/Employee etc.

All pink boxes are mandatory to complete in order to save the form.

Service Requests can be sent internally or to clients to gather more information etc.

When done, click OK to save.

The screenshot shows the 'Service Desk' interface. On the left is a navigation menu with options like 'My World', 'Main Menu', 'e-HR', 'CRM', 'Service Desk', 'Service Requests', 'Knowledge Base', 'Reports', 'Assets', 'Documents', and 'Contracts'. The 'Service Desk' section is active, showing a user profile for Molly Brown. The main area displays a list of service requests with columns for Name, Status, Help Desk, Requester, and Created. Two requests are visible:

| Name | Status | Help Desk | Requester | Created |
|---|--------|-------------------------|-----------------|------------------|
| 00065: Need help with holidays bookings! | New | General Enquires | Elizabeth White | 08/11/2021 11:58 |
| 00056: Bingo hall Kiosk broken at Carlton | New | Service and Maintenance | Arthur Briggs | 15/12/2020 11:27 |

At the top right of the interface, there is an 'ADD NEW' button and a notification badge showing '2' requests.



Service Desks

Knowledge Base

You can use the knowledge base to log external/internal solutions to a variety of problems

Employees can navigate here when a service request comes in, to identify the next steps to take.

To find and add new knowledge Base click Service Desk from the left hand navigation. From the drop down this produces, click Knowledge Base.

Fill out the information i.e. subject (issue), the category and type, solutions etc.

When done, click OK to save.

The screenshot shows the 'Service Desk' interface. On the left is a navigation menu with items: My World, Main Menu, e-HR, CRM, Service Desk (expanded), Service Requests, Knowledge Base, Reports, Assets, Documents, and Contracts. The main area displays a table of service requests.

| Service Desk | | | | | | | ADD NEW | |
|--|--------|-------------------------|-----------------|------------------|--------------------------|--------------------------|---------|----------|
| Service Requests | | | | | | | | |
| | | | | | | | 2 | |
| | | | | | | | OPENED | ARCHIVED |
| Name | Status | Help Desk | Requester | Created | | | | |
| <input type="checkbox"/> 00065: Need help with holidays bookings! | New | General Enquires | Elizabeth White | 08/11/2021 11:58 | <input type="checkbox"/> | <input type="checkbox"/> | | |
| <input type="checkbox"/> 00056: Bingo hall Kiosk broken at Carlton | New | Service and Maintenance | Arthur Briggs | 15/12/2020 11:27 | <input type="checkbox"/> | <input type="checkbox"/> | | |



Assets

How to set up and manage assets in Zway



Asset Management

Importing Assets

From the left hand navigation, click Assets
From the drop down this produces click assets.

To add a new asset singularly, click the yellow add new button

Fill out of all the asset information

i.e. Name/ID, Status, Description, Price, Expected Life etc.

All of the pink boxes are mandatory to fill in

Once complete, click Save

To import multiple assets, click the green Import button

Here you can upload a spreadsheet of all assets information.

They will be uploaded into the system within seconds.

The screenshot shows the 'Assets' management page in the ZWAY system. On the left is a navigation menu with 'Assets' selected. The main area displays a table of assets with the following data:

| Name / ID | Serial Number | Status | Purchase Price | Purchase Date | # |
|-----------------------|---------------|---------|----------------|---------------|---|
| Bingo Kiosk 1 Carlton | 00987BH1 | Broken | £40,000.00 | 11/12/2019 | A |
| Bingo Kiosk 2 Carlton | 00987234BH2 | Working | £40,000.00 | 10/12/2019 | B |
| Designs | 02314 | Working | £1,500.00 | 01/06/2020 | C |
| Drilling machine | | Working | £100,000.00 | 11/12/2019 | D |
| Production Warehouse | 011234 | Working | £1,000.00 | 01/01/2020 | E |
| Store 1 | 01213 | Working | £150.00 | 01/01/2020 | F |



Contracts

How to set up and manage contracts in Zway



Contracts

Adding Contracts

From the left hand navigation click Contracts.

Here there will be a list of contracts already within the system.

To add a new contract singularly, click the yellow add new button in the top right hand

Fill out all of the contract information i.e. Contract Title, Type, Renewal Date etc. All pink boxes are mandatory to complete before saving.

When done, click OK to save

To add multiple contracts, click the green Import button in the top right
You will be able to import a spreadsheet of all contract details

These will be updated into the system within minutes

The screenshot shows the 'Contract Manager' interface. On the left is a navigation menu with 'Contracts' selected. The main area displays a table of contracts with columns for Name, Date of Signing, and Contract Status. A yellow 'ADD CONTRACT' button is in the top right. Below the table are buttons for 'Filter', 'IMPORT', and 'EXPORT TO XLSX'.

| Name | Date of Signing | Contract Status | # |
|--|-----------------|-----------------|---|
| Abacus Sales Contract (20 - SAL - 0004) | 16/12/2020 | New | A |
| Bingo Hall refurb for Carlton (20 - SPPL - SUP - 0003) | 15/12/2020 | New | B |
| Rebrand (20 - SPPL - SAL - 0001) | 10/12/2020 | New | C |
| Shoe Designs (20 - SPPL - SAL - 0002) | | New | D |

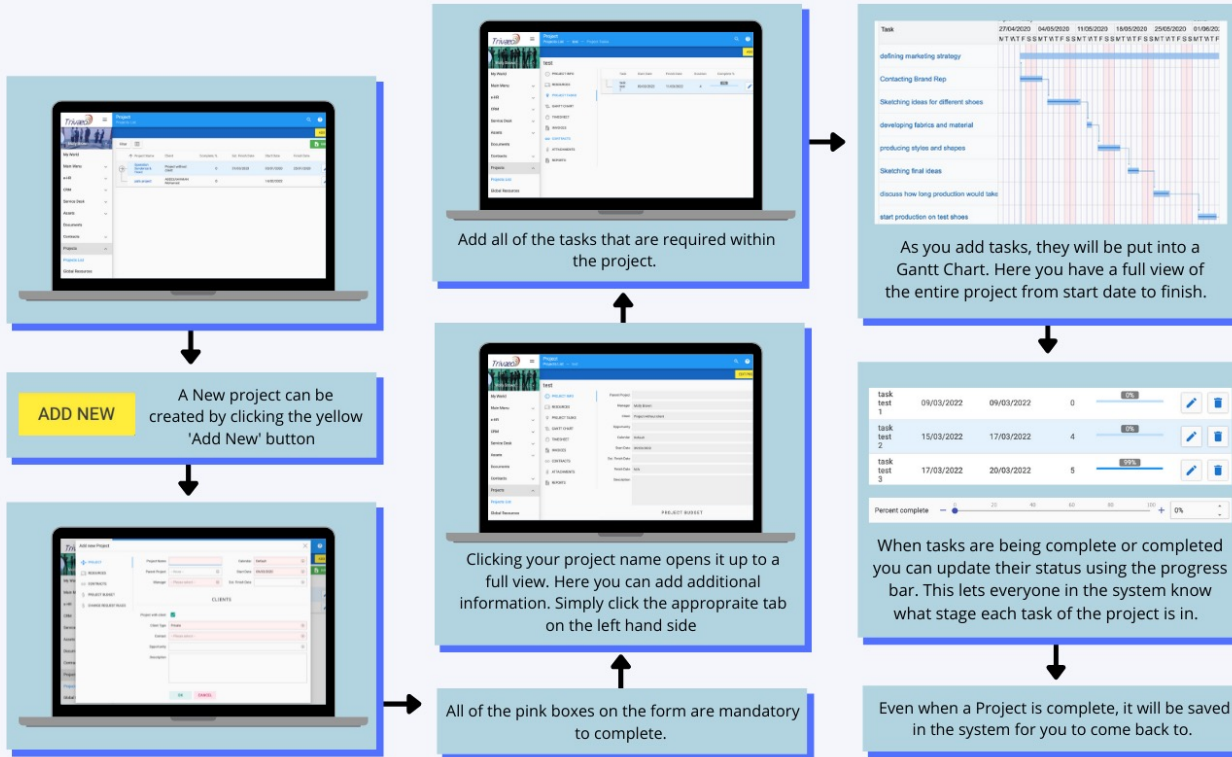


Projects

How to set up and manage projects in Zway

PROJECTS PROCESS

Your projects management system stores and order the tasks within every project that needs to be complete. You can assign different people or materials to ensure the best work is produced in each task ensuring the highest quality in the project overall.





Projects

Adding Projects

From the left hand navigation click Projects
From the drop down this produces, click Projects List.

To add a new project, click the yellow add new button in the top right hand corner

Fill out all of the information on the form
i.e. Name, Manager, Start Date etc.

Use the five tabs along the side of the form to input more information
Click OK to save

You can also upload projects using the green import button
Here you can upload a spreadsheet of all project details
These will be updated in the system within minutes.

The screenshot shows the ZWAY Project List interface. On the left is a navigation menu with the following items: My World, Main Menu, e-HR, CRM, Service Desk, Assets, Documents, Contracts, Projects (selected), Projects List, and Global Resources. The main area displays a table of projects with the following data:

| Project Name | Client | Complete, % | Est. Finish Date | Start Date | Finish Date | | |
|-----------------------------------|--------------------------------|-------------|------------------|------------|-------------|--|--|
| Collaboration with Nike | Project without client | 97 | 24/03/2021 | 01/05/2020 | 07/07/2020 | | |
| Launch seasonal brand | Project without client | 100 | 31/12/2020 | 01/09/2020 | 28/12/2020 | | |
| New wembley service - IKEA | Bolton Limited (Cath Oldfield) | 100 | 24/03/2021 | 15/01/2021 | | | |
| Robert New - Purple Books Limited | Project without client | 0 | | 14/12/2020 | 15/12/2020 | | |

Additional interface elements include a top navigation bar with 'Project Projects List', search, help, and refresh icons, an 'ADD NEW' button, a 'Filter' dropdown, and an 'IMPORT' button.



Projects

Gantt Charts

Inside of projects, you can create Gantt Charts. These are great for mapping processes/steps throughout the given period of time

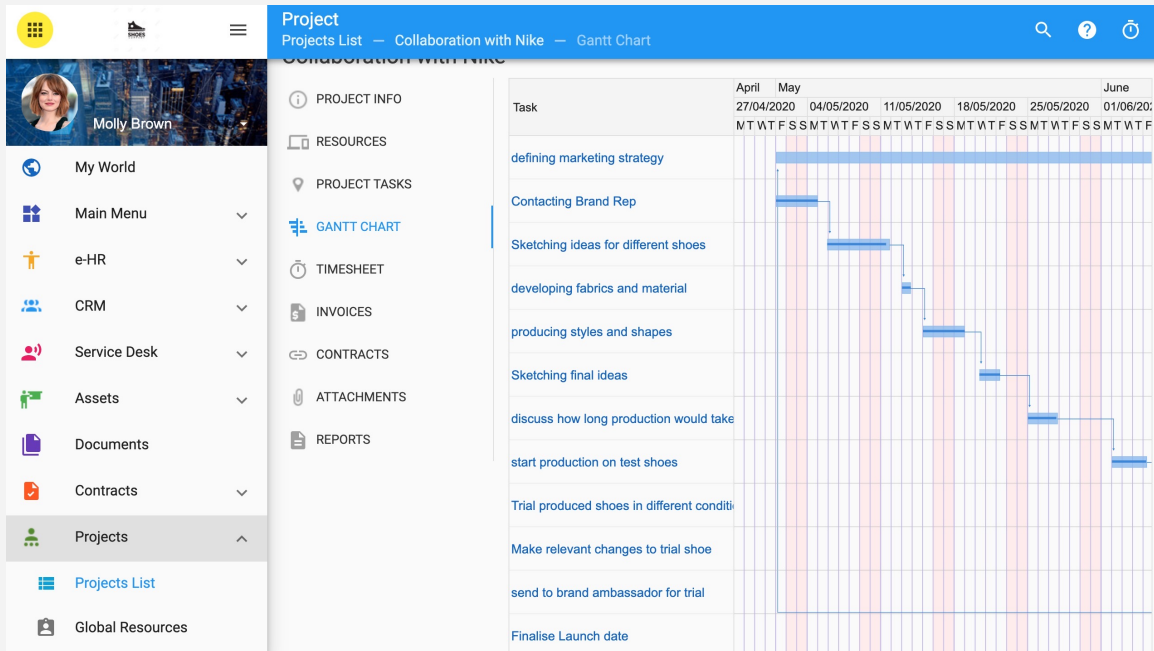
To create a Gantt Chart, from the project main home screen, identify the project you want to produce a Gantt Chart for.

To open the project into full viewing mode, click the name of the project

In the full view mode, there are nine tabs along the left hand side.

Here you can input additional data for the project

To create a Gantt Chart, click the tab labelled Gantt Charts





Projects

Global Resources

Global Resources are a collection of people, companies etc. that can be used/contracted for help in the project

To manage or add a new resource, click Projects from the left hand navigation From the drop down this produces; click Global Resources

Here you will see a list of all existing global resources in the system.

To add a new resource, click the yellow add new button
Fill out the information on the form
i.e. Type Name, Email, Project Code, Payment Rate etc.

When done, click save

| Resource Name | Project Code | Type | Owner | # |
|-----------------|--------------|----------|-------------|---|
| Arthur Briggs | | Employee | | A |
| Cath Oldfield | BH1 | Contact | Molly Brown | B |
| David Claxton | | Employee | | C |
| Eddie Webb | 01 | Contact | Molly Brown | D |
| Jessica Holland | | Employee | | E |
| Shoe Research | 123 | Work | Ted Neil | F |
| | | | | G |
| | | | | H |
| | | | | I |
| | | | | J |
| | | | | K |
| | | | | L |
| | | | | M |
| | | | | N |



Resources

How to set up and manage resources in Zway



Resources

Resource Calendar

The resource calendar maps out when all resources are in use across the entire month

To navigate to your resource calendar, click Resources from the left hand navigation
From the drop down this produces, click Resource Calendar

Upon this calendar you can navigate through different dates by clicking the Date Navigator button in the top left corner

Navigate between Jobs, Employees or Assets being used across the month, by switching the tabs in the top right corner

You can change the default monthly view, to a full or working week by using the corresponding buttons along the top of the calendar

The screenshot shows the 'Project Global Resources' interface. On the left is a navigation menu with options like 'My World', 'Main Menu', 'e-HR', 'CRM', 'Service Desk', 'Assets', 'Documents', 'Contracts', 'Projects', 'Projects List', and 'Global Resources'. The main area displays a table of resources.

| Resource Name | Project Code | Type | Owner | # |
|-----------------|--------------|----------|-------------|---|
| Arthur Briggs | | Employee | | A |
| Cath Oldfield | BH1 | Contact | Molly Brown | B |
| David Claxton | | Employee | | C |
| Eddie Webb | 01 | Contact | Molly Brown | D |
| Jessica Holland | | Employee | | E |
| Shoe Research | 123 | Work | Ted Neil | F |
| | | | | G |
| | | | | H |
| | | | | I |
| | | | | J |
| | | | | K |
| | | | | L |
| | | | | M |
| | | | | N |
| | | | | - |



Resources

Adding Jobs

To add a Job, first click the Resources application from the left hand navigation From the drop down this produces, click Job

Here you will be able to see a list view of all jobs already running in the system To edit any of these jobs, click the Pencil Icon at the end of each row.

To add a new job click the yellow add button in the top left.

Fill out all job information in the form i.e. name, Status, Start & End etc Use the Resource tab on the left of the form to link Resources to the Job Once complete, click OK to save

This will then appear on your Resource calenda much like the other jobs in the system.

The screenshot shows the 'Resources' application interface. On the left is a navigation menu with options: Documents, Contracts, Projects, Resources (selected), Resources Calendar, Resources Scheduler, Job, Report, Stock Manager, and Administration. The main area displays a table of resources with the following data:

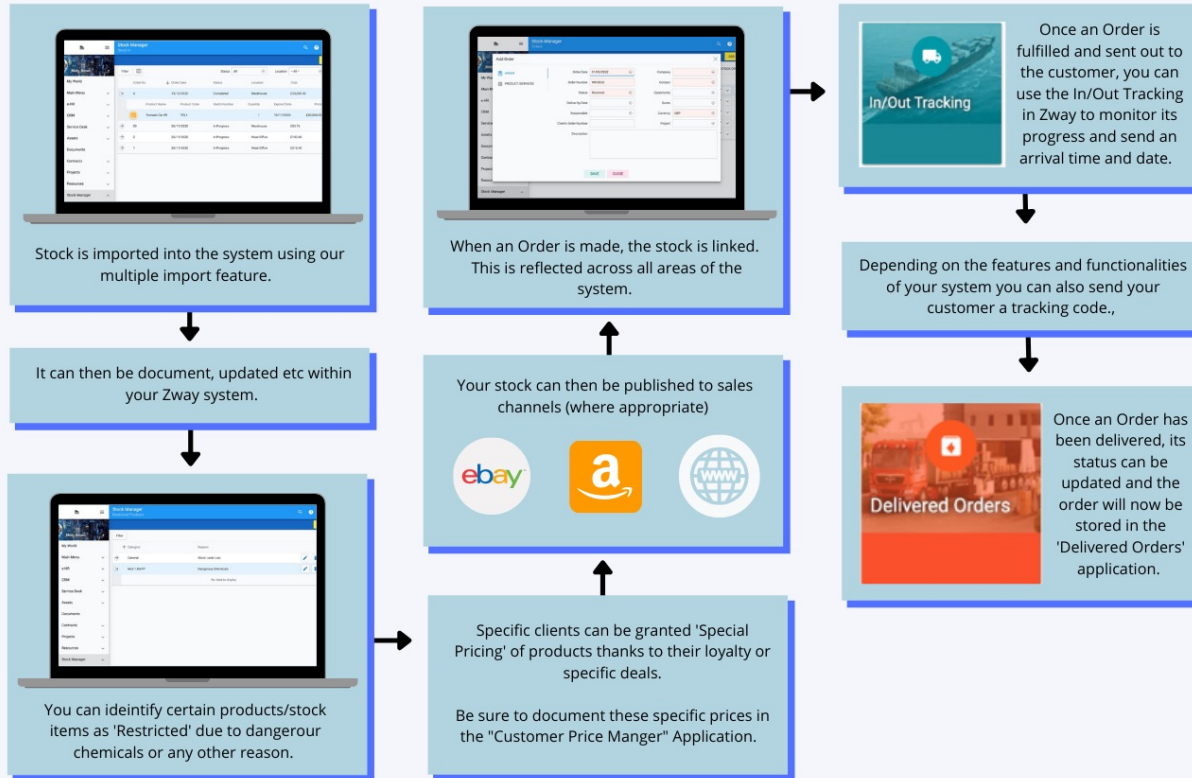
| Name | Status | Start | End | Client | Deadline | # |
|--|----------|------------|------------|-----------------|----------|---|
| Fix the floor at cleveland place | Started | 01/02/2022 | 01/02/2022 | Abacus Limited | | A |
| Deliver blackpoolconveyor | New | 17/12/2020 | 17/12/2020 | | | C |
| Prepare site for delivery of Kiosk | Assigned | 17/12/2020 | 17/12/2020 | Carlton Limited | | D |
| Machine Breakdown cover | Assigned | 16/12/2020 | 16/12/2020 | Bolton Limited | | F |
| Deliver Equipment for Bingo hall install | Assigned | 16/12/2020 | 16/12/2020 | Carlton Limited | | G |
| Arrange Presentation | New | 10/12/2020 | 11/12/2020 | Danilo Brandon | | H |
| Call to reschedule meeting | Assigned | 27/11/2020 | 27/11/2020 | Cath Oldfield | | J |
| Creating Process | Assigned | 26/11/2020 | 26/11/2020 | Cath Oldfield | | K |
| Rebrand Designs | Started | 26/11/2020 | 20/01/2021 | Alan Nicols | | L |



Stock

How to set up and manage your Stock in Zway

STOCK MANAGEMENT PROCESS





Stock Manager

Stock Coming In

Manage stock coming in, with the Stock In application

From the left hand navigation, click Stock Manager
From the drop down this produces, click Stock In

Here you will be able to see a list of stock already coming in.

To view the product details of the order coming in, click the small arrow on the left side of the order number

You can edit any other Orders by click then Pencil Icon at the end of each order row.

Next to the Pencil Icon there is a small downwards arrow; this drop down allows you to select Track Inbound allowing you to see where your stock is currently

The screenshot shows the 'Stock Manager' application interface. On the left is a navigation menu with items like 'My World', 'Main Menu', 'e-HR', 'CRM', 'Service Desk', 'Assets', 'Documents', 'Contracts', 'Projects', 'Resources', and 'Stock Manager'. The main area displays a table of 'Stock In' orders. The table has columns for Order No, Order Date, Status, Location, and Total. One order is expanded to show product details: Product Name (Tornado Car lift), Product Code (TCL1), Batch Number, Quantity (1), Expired Date (10/11/2020), and Price (£20,000.00). Each row in the table has a pencil icon for editing and a small arrow for expanding details.

| Order No | Order Date | Status | Location | Total |
|--|------------|-------------|-------------|---|
| 4 | 15/12/2020 | Completed | Warehouse | £20,000.00 |
| Product Name: Tornado Car lift Product Code: TCL1 | | | Quantity: 1 | Expired Date: 10/11/2020 Price: £20,000.00 |
| 03 | 26/11/2020 | In Progress | Warehouse | £83.76 |
| 2 | 26/11/2020 | In Progress | Head Office | £103.80 |
| 1 | 26/11/2020 | In Progress | Head Office | £210.40 |



Stock Manager

Add New - Stock Coming In

To add a new order of Inbound stock, click the yellow Add button in the top left corner

Fill out all of the information on the form
i.e. Order Number, Supplier, Contact etc.

Use the Products/Services tab on the left hand side to link any Products/Services to the Inbound Order.

Once complete, Click OK to save

The screenshot shows the 'Add Stock In' form in the Stock Manager application. The form is titled 'Add Stock In' and is part of the 'Stock Manager' application. It contains several input fields: 'Order No' (empty), 'Location' (dropdown), 'Order Date' (01/02/2022), 'Contact' (dropdown), 'Supplier' (dropdown), 'Expected Delivery' (01/02/2022), 'Status' (In Progress), and 'Est. QC release date' (dropdown). There are 'OK' and 'CANCEL' buttons at the bottom right. The left sidebar shows 'STOCK IN INFO' and 'PRODUCT/SERVICES' tabs.



Stock Manager

Stock Going Out

Manage stock going out, with the Stock Out application

From the left hand navigation, click Stock Manager
From the drop down this produces, click Stock Out

Here you will be able to see a list of stock going out.

To view the product details of the order going out, click the small arrow on the left side of the order number

You can edit any other Orders by click then Pencil Icon at the end of each order row.

The screenshot shows the 'Stock Manager' application interface. The top navigation bar is blue and contains the title 'Stock Manager' and 'Stock Out', along with search, help, and refresh icons. A yellow 'ADD' button is located in the top right corner. Below the navigation bar is a user profile section for 'Molly Brown'. The left sidebar contains a navigation menu with items: My World, Main Menu, e-HR, CRM, Service Desk, Assets, Documents, Contracts, Projects, Resources, and Stock Manager. The main content area displays a table of stock going out orders. The table has columns for Order No, Order Date, Status, Location, and Total. Two orders are listed: Order No 02, Order Date 26/11/2020, Status Completed, Location Head Office, Total £15.00; and Order No 1, Order Date 26/11/2020, Status Completed, Location Head Office, Total £0.00. Each row has a small arrow icon on the left and edit/delete icons on the right.

| Order No | Order Date | Status | Location | Total |
|----------|------------|-----------|-------------|--------|
| 02 | 26/11/2020 | Completed | Head Office | £15.00 |
| 1 | 26/11/2020 | Completed | Head Office | £0.00 |



Stock Manager

Add New - Stock Going Out

To add a new order of Outgoing stock, click the yellow Add button in the top left corner

Fill out all of the information on the form i.e. Order Number, Status, Contact etc.

Use the Products/Services tab on the left hand side to link any Products/Services to the Inbound Order.

Once complete, Click OK to save

This order will then appear in the list view with all others.

The screenshot shows the 'Stock Manager' interface. On the left is a navigation menu with items like 'My World', 'Main Menu', 'e-HR', 'CRM', 'Service Desk', 'Assets', 'Documents', 'Contracts', 'Projects', 'Resources', and 'Stock Manager'. The main area displays a table of stock orders with columns for Order No, Order Date, Status, Location, and Total. Two orders are listed: Order No 02 (Completed, Head Office, £15.00) and Order No 1 (Completed, Head Office, £0.00). A yellow 'ADD' button is visible in the top right corner of the main area.

| Order No | Order Date | Status | Location | Total |
|----------|------------|-----------|-------------|--------|
| 02 | 26/11/2020 | Completed | Head Office | £15.00 |
| 1 | 26/11/2020 | Completed | Head Office | £0.00 |



Stock Manager

Orders

From the left hand navigation, click Stock manager
From the drop down this produces, click Orders

Here you can see all of the orders already within the system
These are both Inbound and Outbound Orders

To view any products attached to the order, click the small arrow on the left hand side of the order number

Navigate through Client and Stock orders using the two corresponding tabs along the top right of the list

You can also search through archived orders, by clicking the corresponding checkbox along the top of the list.

The screenshot shows the 'Stock Manager Orders' interface. On the left is a navigation menu with items like 'My World', 'Main Menu', 'e-HR', 'CRM', 'Service Desk', 'Assets', 'Documents', 'Contracts', 'Projects', 'Resources', and 'Stock Manager'. The main area displays a table of orders with the following data:

| Order No | Order Date | Sum | Status |
|----------|------------|------------|--------------------|
| WR-0002 | 26/11/2020 | £140.51 | Assigned |
| WR-0003 | 26/11/2020 | £84.60 | Received, Accepted |
| WR-0004 | 26/11/2020 | £80.99 | Assigned, Accepted |
| WR-0005 | 14/12/2020 | £114.46 | Received |
| WR-0015 | 16/12/2020 | £52,800.00 | Assigned, Accepted |

At the top of the table, there are filter options for 'Active' (selected) and 'Archived'. On the right side of the table, there are tabs for 'CLIENT ORDERS' and 'STOCK ORDERS', and a yellow 'ADD NEW' button.



Stock Manager

Add New - Orders

To add a new Order, click the yellow Add new button in the top right hand

Fill out the form of information
i.e. Order date, Status, Company etc

Use the Products/Services tab on the left had side to link your products/services to this order.

Once complete, click Save
This order will now appear in the list view along with all others.

The screenshot shows the 'Add Order' form in the Stock Manager application. The form is a modal window with a title bar 'Add Order' and a close button. It contains several input fields: 'Order Date' (01/02/2022), 'Order Number' (WR-0020), 'Status' (Received), 'Deliver by Date', 'Responsible', 'Client's Order Number', and 'Description' (a text area). On the right side, there are dropdown menus for 'Company', 'Contact', 'Opportunity', 'Quote', 'Currency' (set to GBP), and 'Project'. At the bottom of the form are 'SAVE' and 'CLOSE' buttons. The background shows the 'Stock Manager' interface with a sidebar menu and a list of 'STOCK ORDERS' on the right.

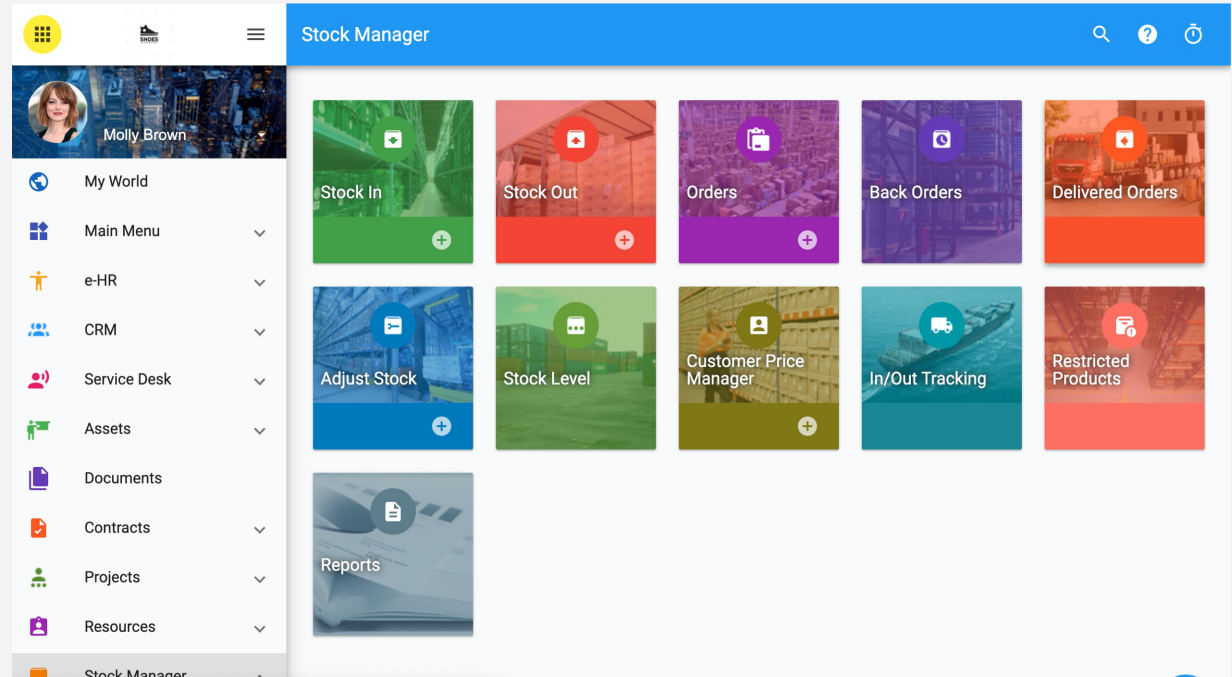


Stock Manager

Delivered Orders

The Delivered Orders application allows you to view a list of all successful deliveries carried out

To view this list, click Stock Manager from the left hand navigation
From the drop down this produces, click Delivered Orders.





Stock Manager

Stock Levels

To manage and view your stock levels inside Zway, click Stock Manager from the left hand navigation

From the drop down this produces, click Stock Level
Here you will see a list view of all your stock

You can see the Product Name, Code, Available Stock etc

Click the small arrow on the left hand to open up more detailed information about your stock i.e. shelf life

The screenshot shows the 'Stock Manager' interface in ZWAY. The top navigation bar is blue and contains the title 'Stock Manager' and 'Stock Level'. Below the navigation bar is a user profile for 'Molly Brown'. The left sidebar lists various modules, with 'Stock Manager' selected at the bottom. The main content area displays a table of stock levels with the following data:

| Product Name | Product Code | Selling Price | Available Stock | Allocated Orders | Stock Orders |
|----------------------------|--------------|---------------|-----------------|------------------|--------------|
| Bingo Hall Kiosk | MFT-2-7-F-F | £40,000.00 | 0 | 0 | |
| Finish Parts | FP1 | £150.00 | 0 | 0 | |
| HMSS Manpower Snr Engineer | HMSS1 | £400.00 | 0 | 0 | |
| Junior Engineer | JE1 | £300.00 | 0 | 0 | |
| Laces | 0230 | £3.00 | 17 | 0 | |
| Large Drilling Machine | LDM1 | £15,000.00 | 0 | 0 | |
| Nike Air Max Pro | 2341 | £0.00 | 0 | 0 | |
| Rubber Shoe Protector | 0202 | £12.00 | 0 | 0 | |
| Senior Engineer | SE1 | £500.00 | 0 | 0 | |
| Tornado Car lift | TCL1 | £40,000.00 | 1 | 0 | |



Stock Manager

Customer Price Manager

The customer Price Manager allows you to add special lower prices for loyal customers within your system

From the left hand navigation click Stock Manager
From the drop down this produces, click Customer price manger

Here you can see a list of customer prices already within the system.

Click the small arrow on the left hand side of the customer name, to open up more detailed information

Click the yellow Add New button in the top right hand to produce a new Customer Price

Fill out the information on the form
i.e. Customer, Special Price for all Products/Services

When done, click OK to save.

The screenshot shows the 'Stock Manager' interface. The top navigation bar includes the title 'Stock Manager' and 'Customer Price Manager', along with search, help, and refresh icons. A yellow 'ADD NEW' button is located in the top right corner. The left-hand navigation menu lists various system areas, with 'Stock Manager' currently selected. The main content area shows a breadcrumb trail 'Customer' > 'Abacus Limited'. Below this, there are tabs for 'PRODUCTS', 'SERVICES', and 'SOFT ALERT'. A table displays the following data:

| | Product Name | Product Code | Category | Price | Custom Price |
|------------|-----------------|--------------|----------------|--------|--------------|
| PRODUCTS | Addidas | CFT-4-17-N-F | Cisco 1.8G NFP | £30.00 | £20.00 |
| SERVICES | Air Gordons Pro | MFT-2-4-F-F | General | £26.00 | £30.00 |
| SOFT ALERT | Boots | CFT-4-11-N-F | Cisco 1.8G NFP | £28.00 | £30.00 |
| | Care kit | CFT-2-17-N-F | Cisco 1.8G NFP | £23.00 | £20.00 |

Below the table, there are three expandable customer entries: 'Carlton Limited', 'DoitConsult Limited', and 'Everyman Limited', each with a right-pointing arrow.



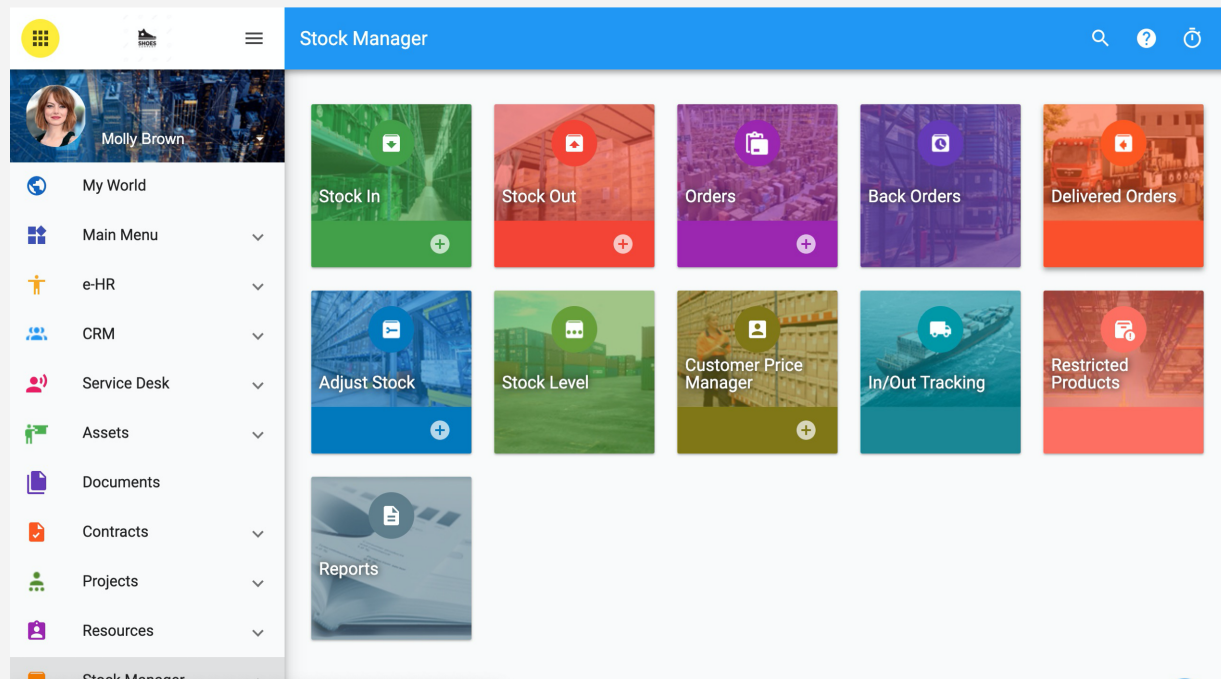
Stock Manager

In/Out Tracking

The In/Out Tracker helps you maintain and track all deliveries coming in and out.

From the left hand navigation click Stock manger
From the drop down this produces, click In/Out Tracking

Here you will see a list view of all In and Out Deliveries occurring





Stock Manager

Restricted Products

From your stock Manager application, click Restricted Products

Here you can list Products/Services that are restricted due to dangerous items, chemicals or very low stock

Click the small arrow on the left hand side of the Product Category to open up more detailed information

To add a new restricted product, click the yellow add button in the right hand corner

Fill out the information on the form i.e. Category, Reason etc.

When complete, click OK to save This will update immediately and appear in the list of Restricted Products.

Stock Manager
Restricted Products

Filter

| Category | Reason | # |
|--------------------|---------------------|---|
| General | Stock Level Low | A |
| Mot 1.8G FP | Dangerous Chemicals | B |
| No data to display | | |

ADD



Thank You!

David Claxton

Tel: +44 7768 702988

Email: David.Claxton@zwayonline.com

sales@zwayonline.com

