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

Login

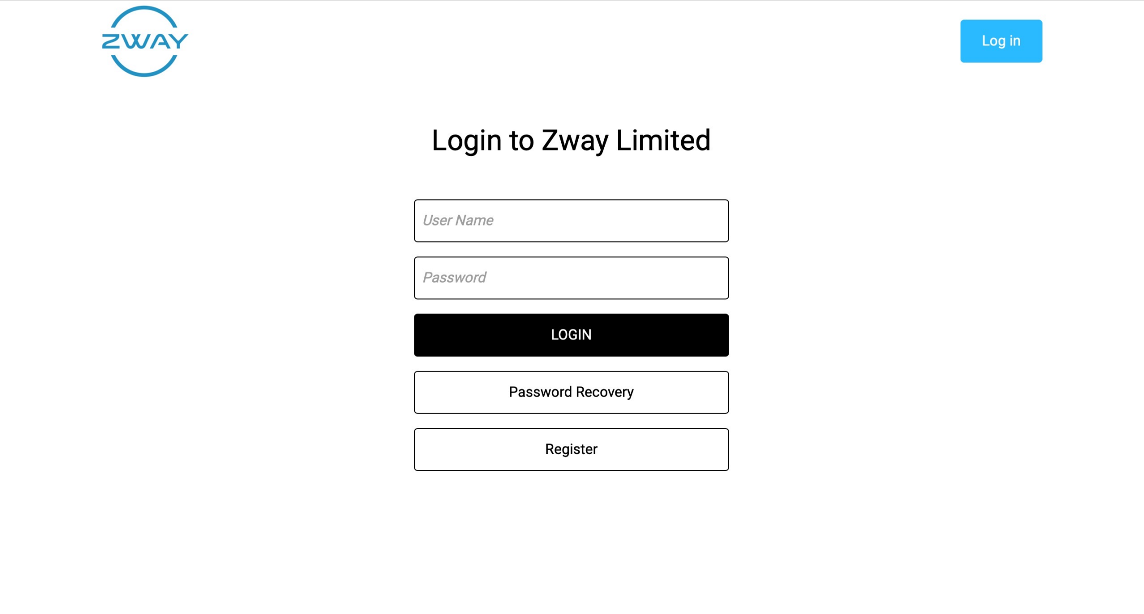
To login to the desktop application go to:
www.app.zwayonline.com

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.

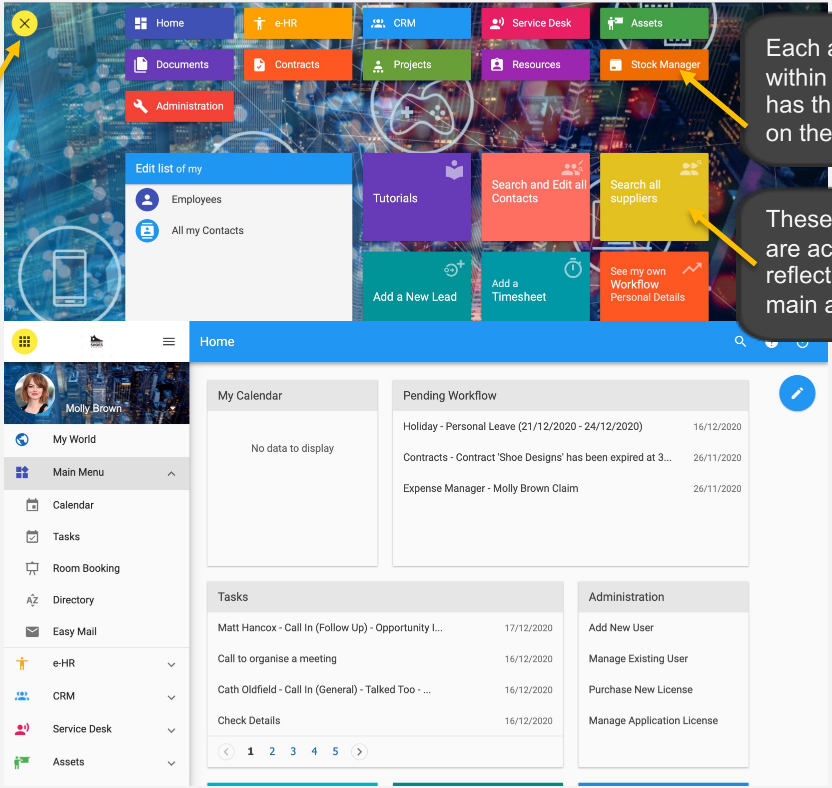


System Setup

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

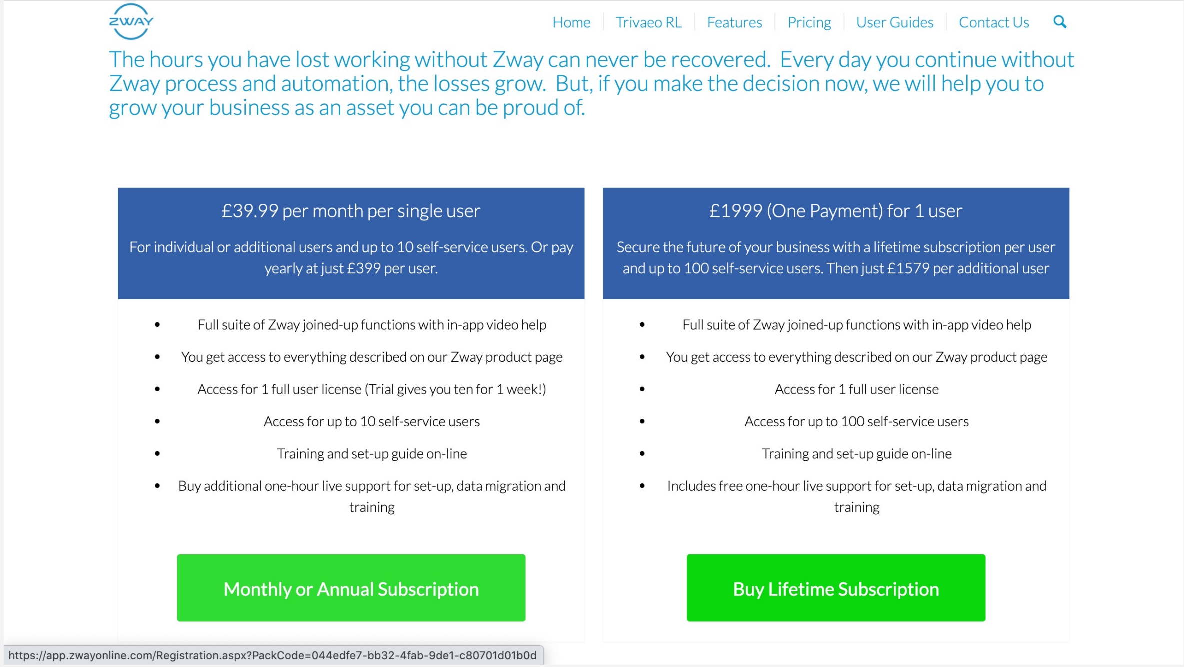
Signing Up

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.



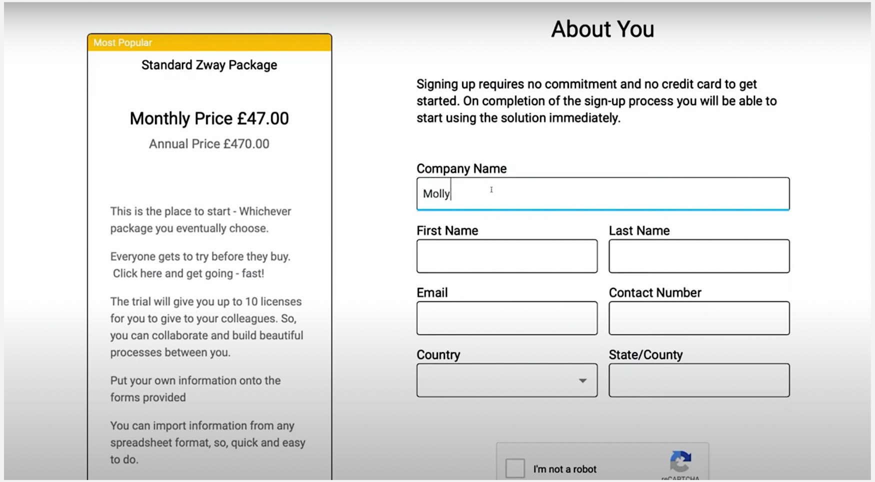
Signing Up

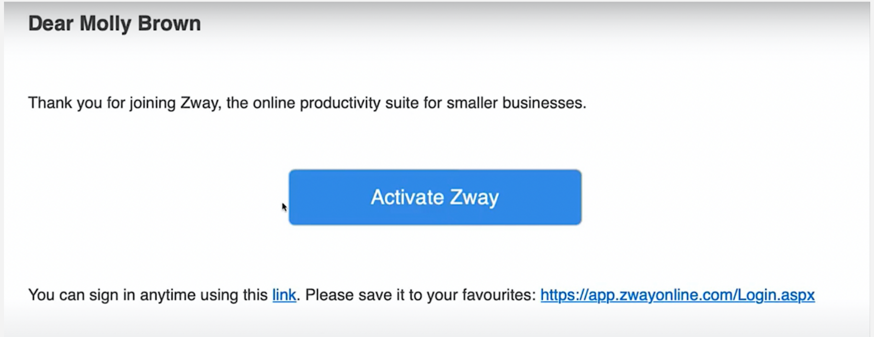
Setting Up Your Platform
Signing up and Logging In

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.





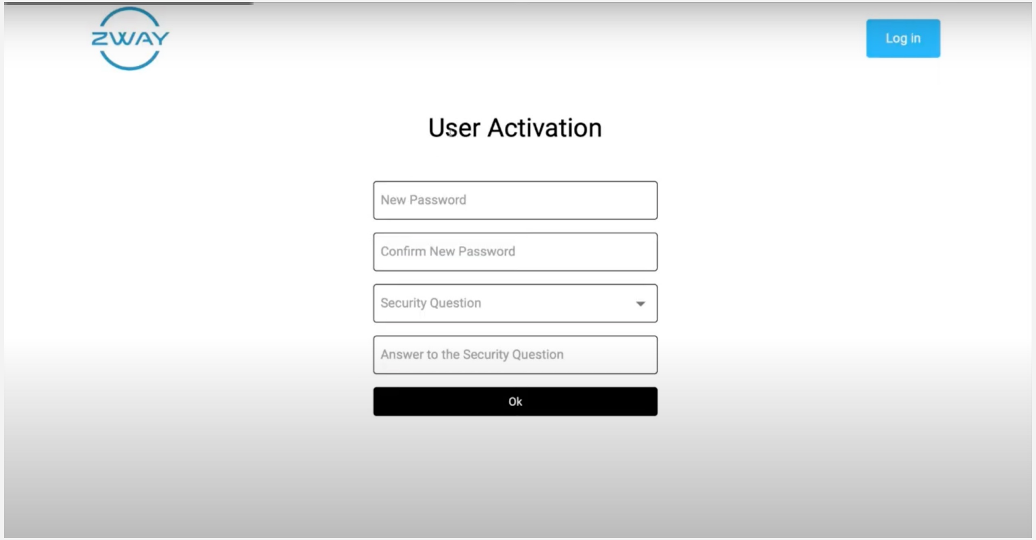
Signing Up

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.



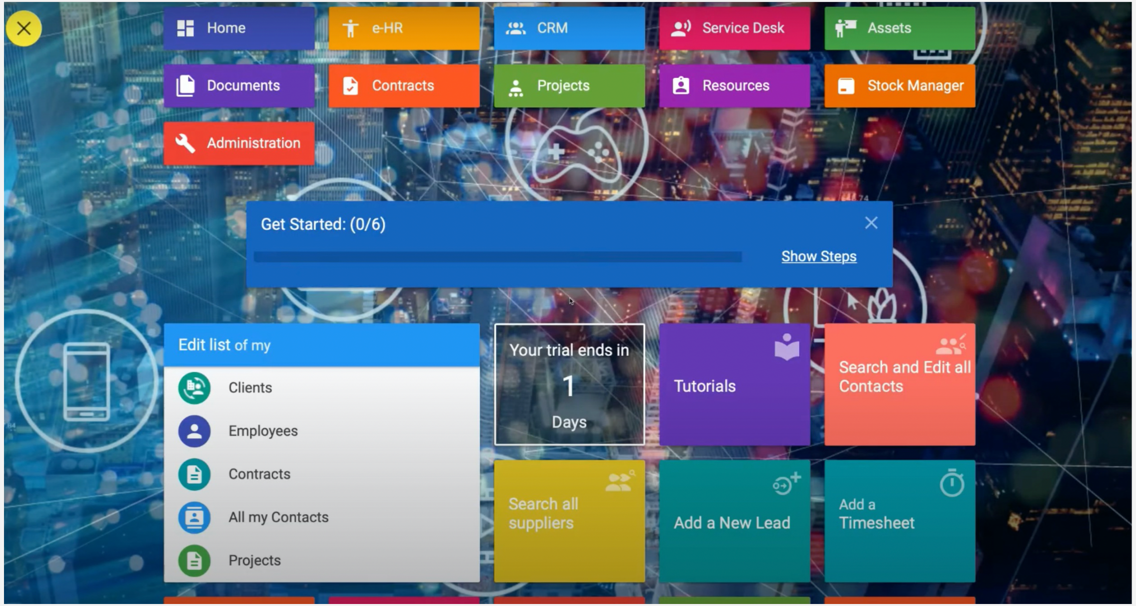
System Setup

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.



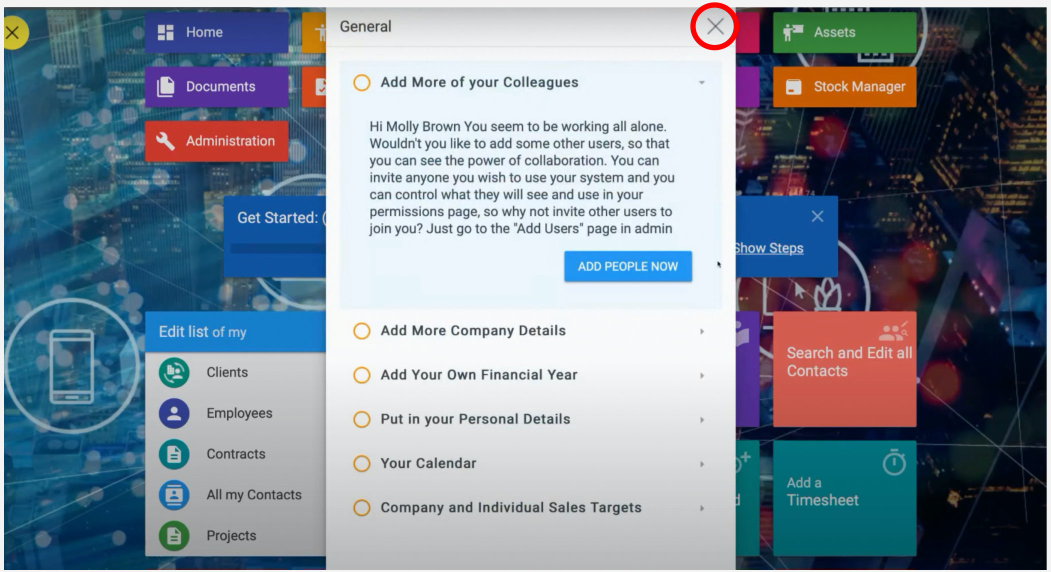
System Setup

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” n 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.

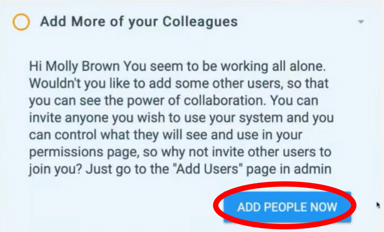
From the User Management screen, click the yellow add new button.

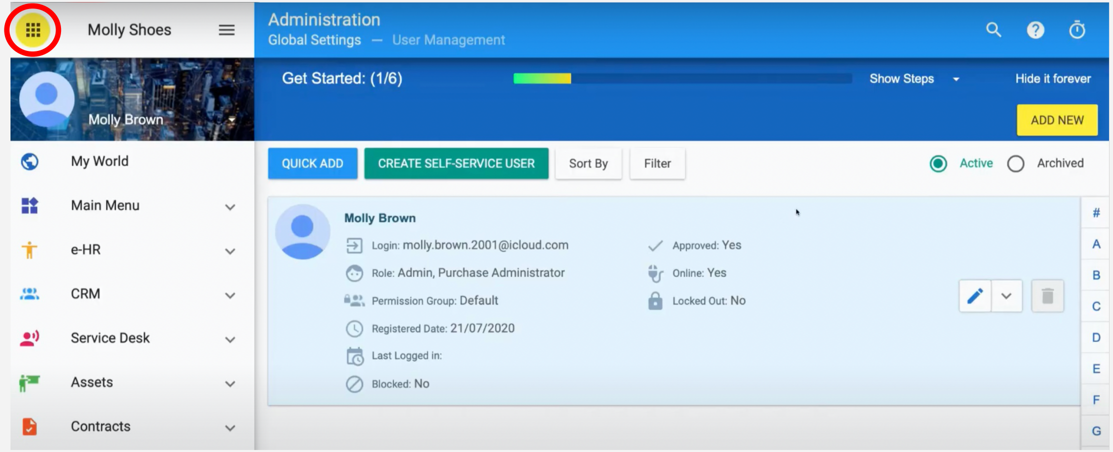
Fill in all information
(i.e. First & Last Name, Contact Details, Employee Status etc.)

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.





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System Setup

Getting Started

2. Add Company Details

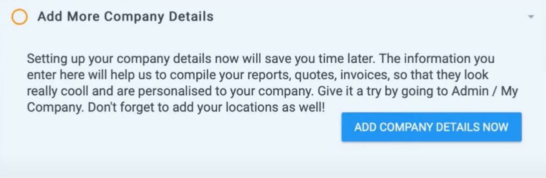
From the Get Started Tab, under the Add Company Details drop down, click Add Company Details Now.

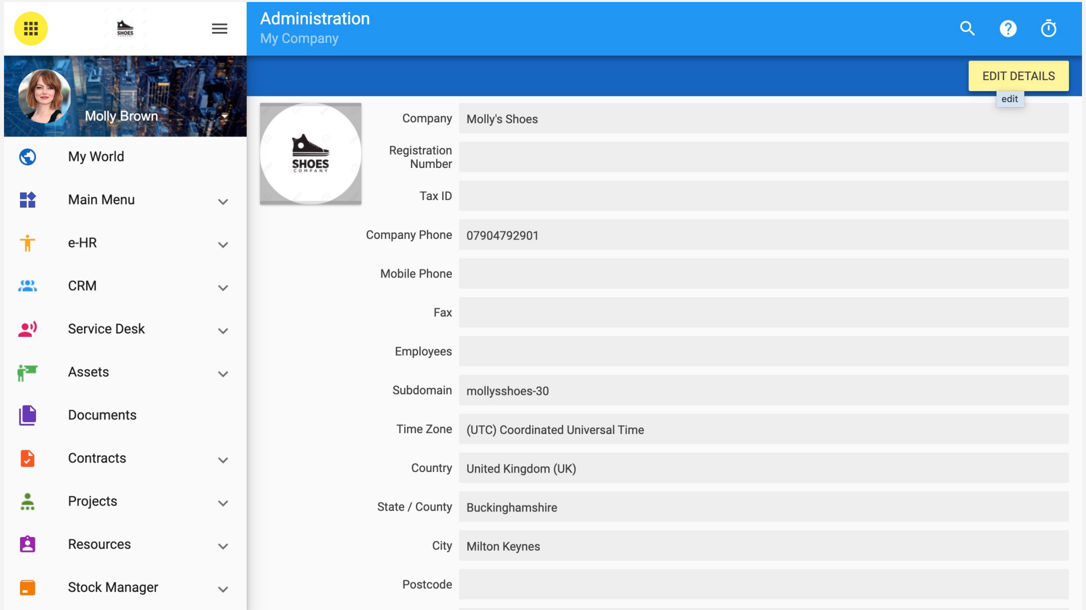
On the My Company page, click the yellow Edit Details Button.

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.





System Setup

Getting Started
3. Add Your Financial Year

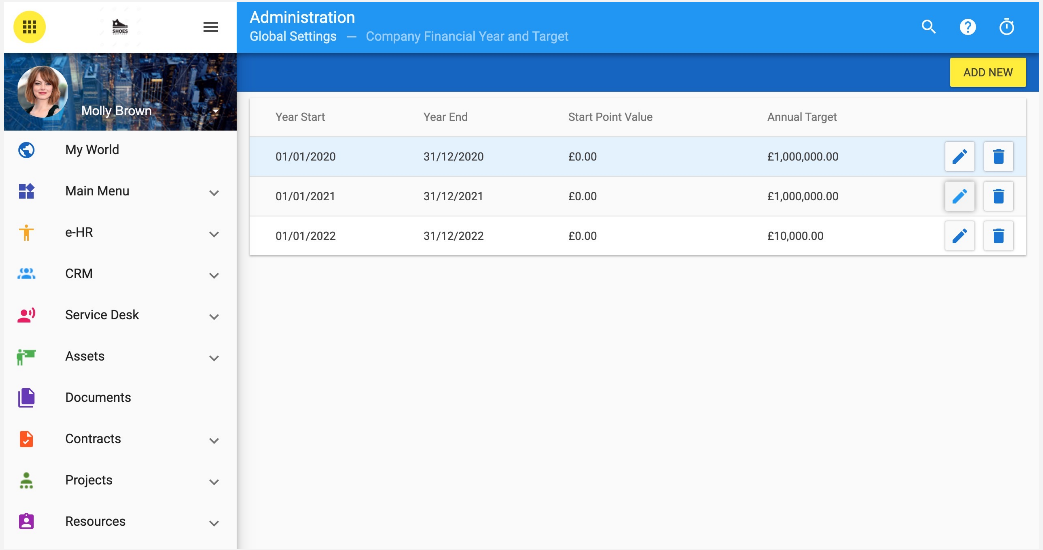
From the Get Started Tab, under the Add your financial year drop down, click the blue 'Yes' button.

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.



System Setup

Getting Started

4. Add Personal Details

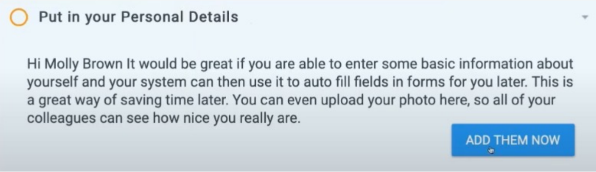
From the Get Started Tab, under the Add your personal details drop down, click Add Them Now.

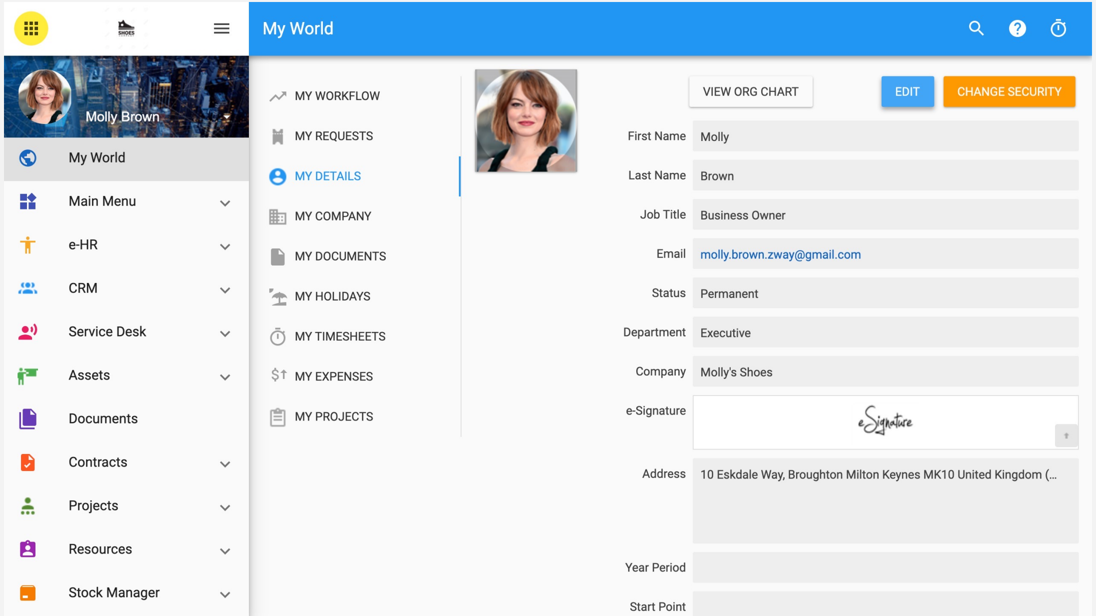
In the My World Application, under My Details you can add additional information.

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.





System Setup

Getting Started
5. Set Permission Groups

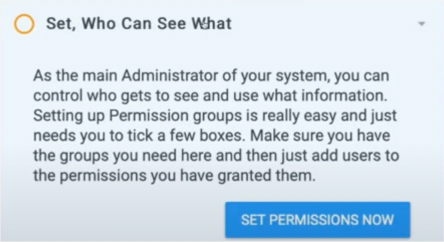
From the Get Started Tab, under the 'Set, who can see what' drop down, click Set Permissions Now.

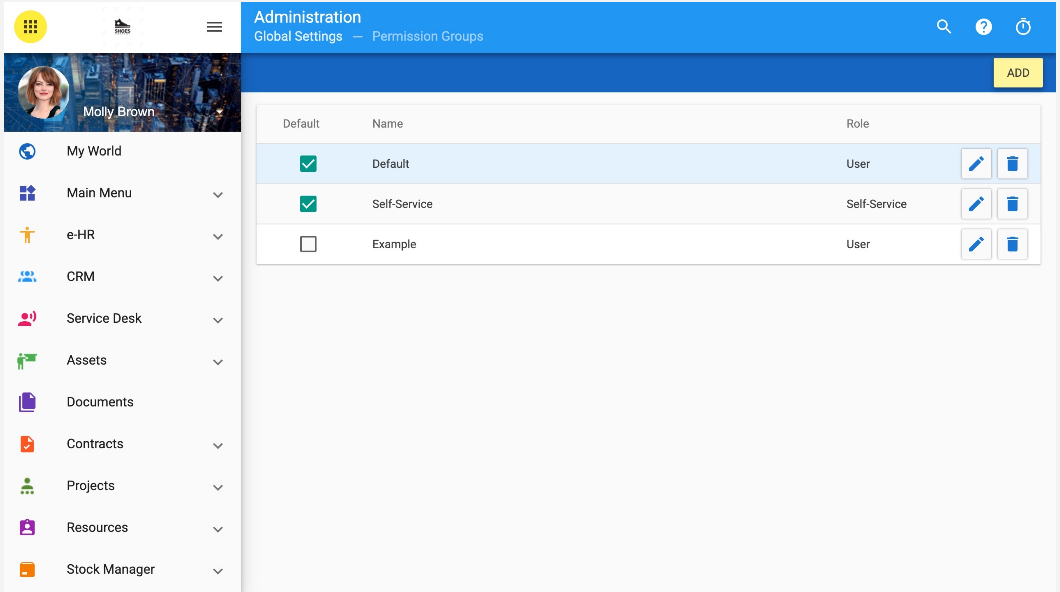
Click the yellow Add button in the top right hand.

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.





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

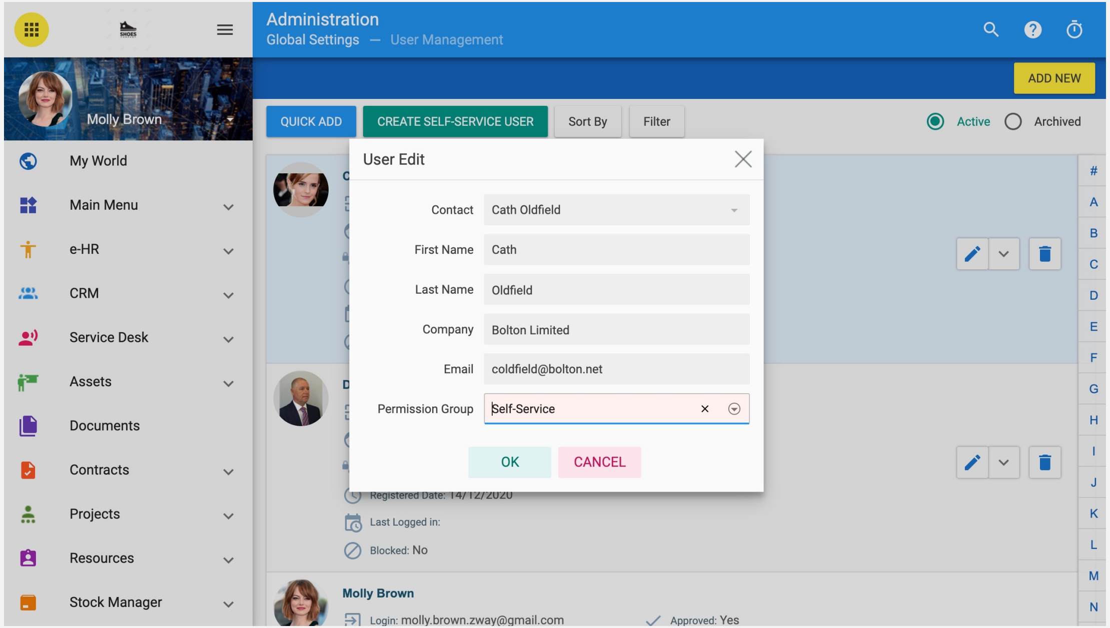
Under the User Management section, click ‘User Management’

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



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System Setup

Getting Started

6. Set Up Your Calendar

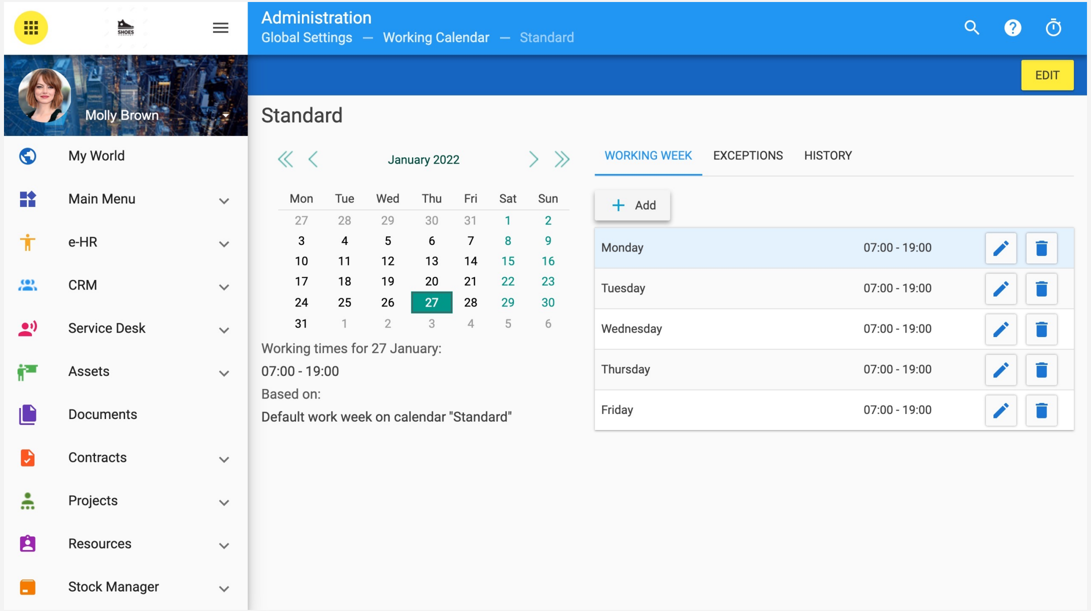
From the Get Started Tab, under the Your Calendar drop down, click the blue ‘Add It Here’ button.

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.



System Setup

Getting Started

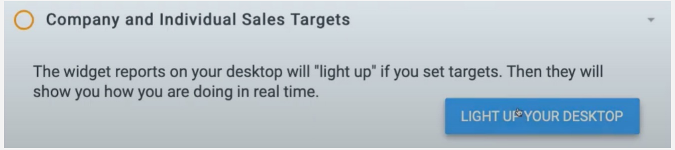
7. Setting Goals

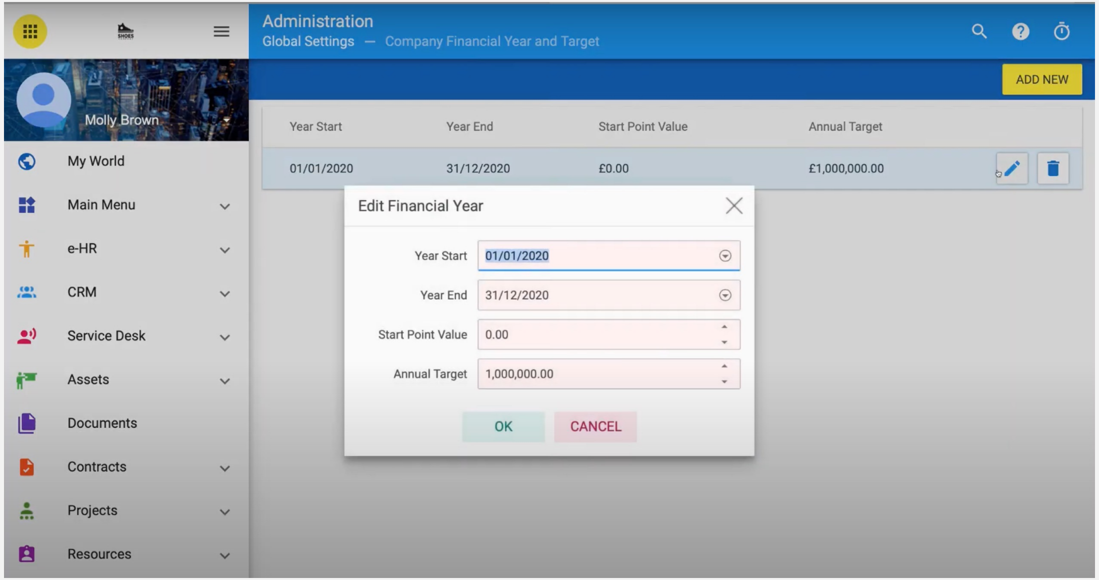
From the Get Started Tab, under the Company and Individual Sales Targets drop down, click the blue 'Light Up Your Desktop' button.

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.





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System Setup

Adding Contacts
Adding them Individually

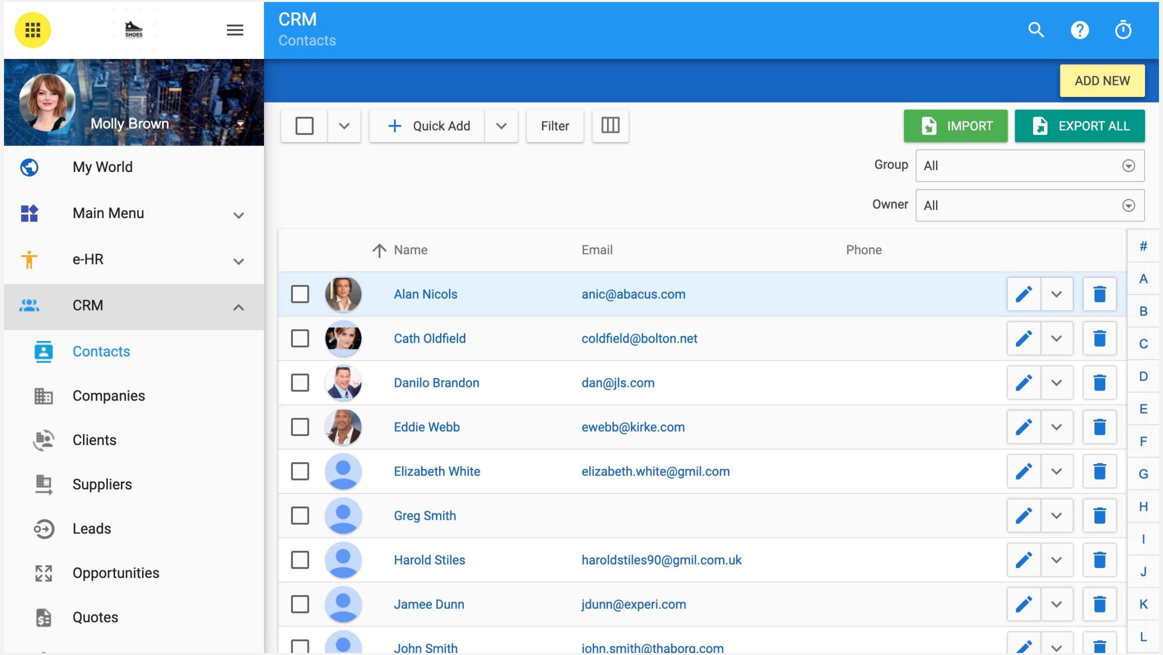
In the left hand navigation, click CRM. From the drop down this produces, click Contacts.

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.



System Setup

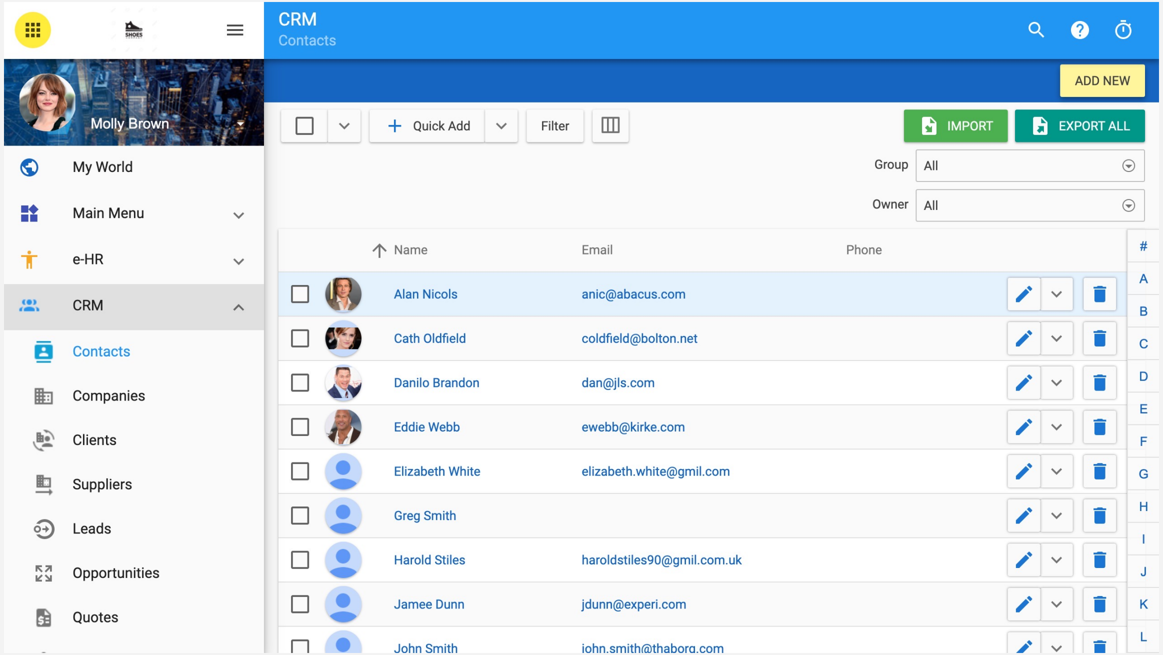
Adding Contacts

Adding them in Mass

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

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

These will be uploaded into the system within minutes.



System Setup

Adding Products

Adding them Individually

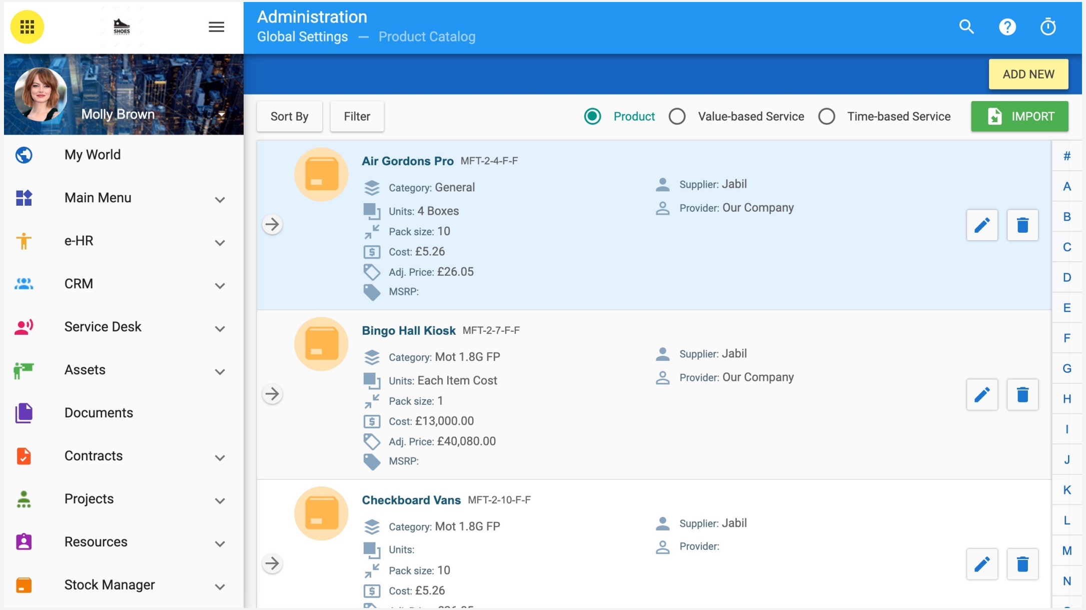
To add products, select Administration from the left hand navigation
From the drop down click Global Settings.

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



System Setup

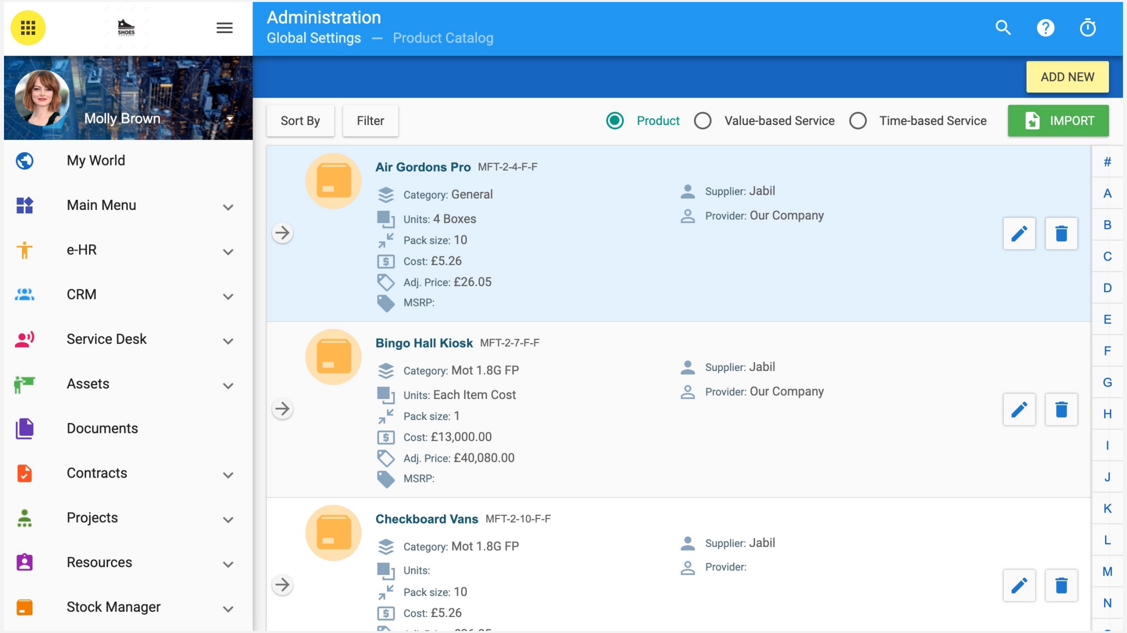
Adding Products

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 CRM System

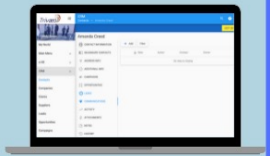
How to set up and use your CRM system in Zway

CRM PROCESS

Customer makes an enquiry on the Zway Online website

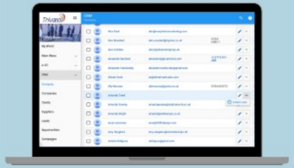
This individual is then logged into the system as a contact, where their name and any other given info is stored.
They can be given the title 'prospect'

Any communications made between yourselves and the individual can be stored in the communication tab.



When the individual shows further interest, they can be updated to a 'Lead'

This can be done by clicking the downwards arrow at the end of the row and click 'Create Lead'



They will now be stored in the Leads application inside your CRM.

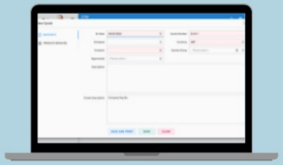
When the contact expresses further interest you can upgrade their status.
Click the downwards arrow at the end of the row to 'Upgrade Lead'

This creates an 'Opportunity'
In the form this presents fill out the name, source etc.

This lets co-workers know that there is a potential for purchase.

The next step will be the produce a Quote for your service, when the lead registers further interest.

A Quote can be produced within the Quotes application inisde your CRM system.
Fill out all necessary information and link to your lead.



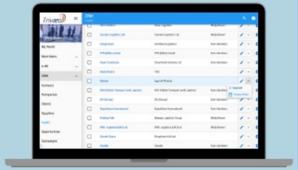
When a Quote is sent and confirmed by the lead, you can then produce a project.

ADD NEW

Projects can be created in the 'projects' application inside Zway. Simply click the yellow add new button, give the project a title, link your contact and start planning out the tasks

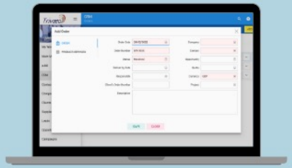
Inside of a project you can map out a sequence of events that are needed to complete the project.

Once a project has been complete and your client is happy, you can produce an Order.



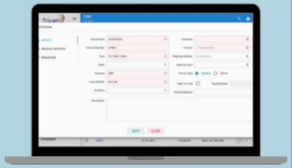
An order can be made through the 'Orders' application or by clicking the downwards arrow at the end of each lead row.

Here you can link the contact/client.opportunity quote, project to complete the entire CRM process.



The final step is to produce an Invoice.
This can be done within the Invoice application on the Zway system

Link the order, contact and opportunity.
You can also set up reminders to send to the client when payment is upcoming.



CRM System

Adding Companies

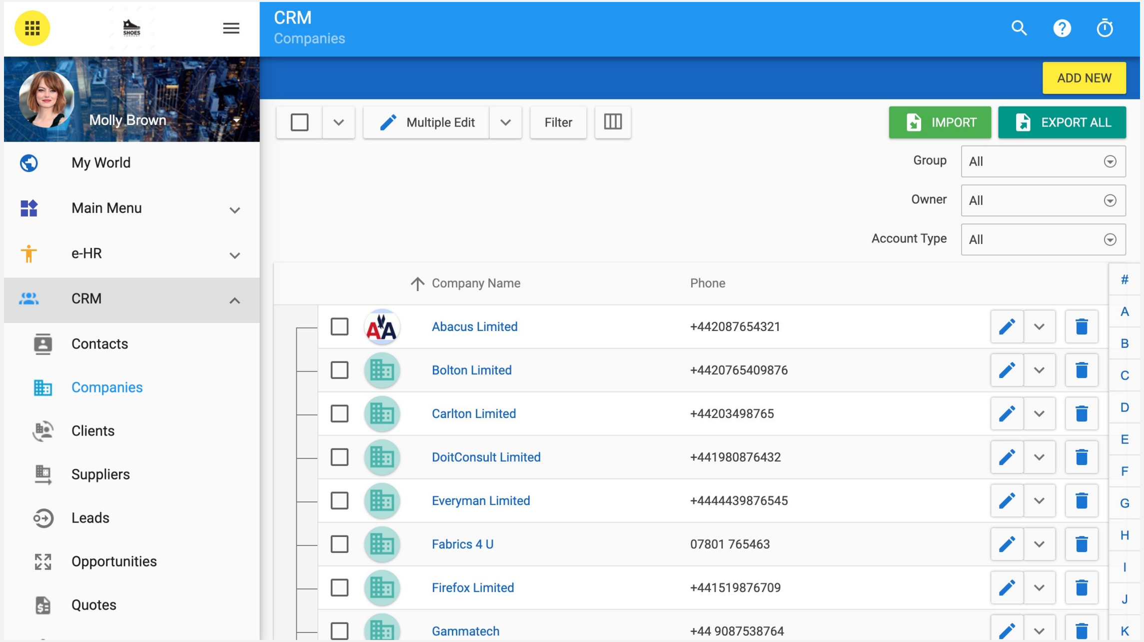
Adding them Individually

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.



CRM System

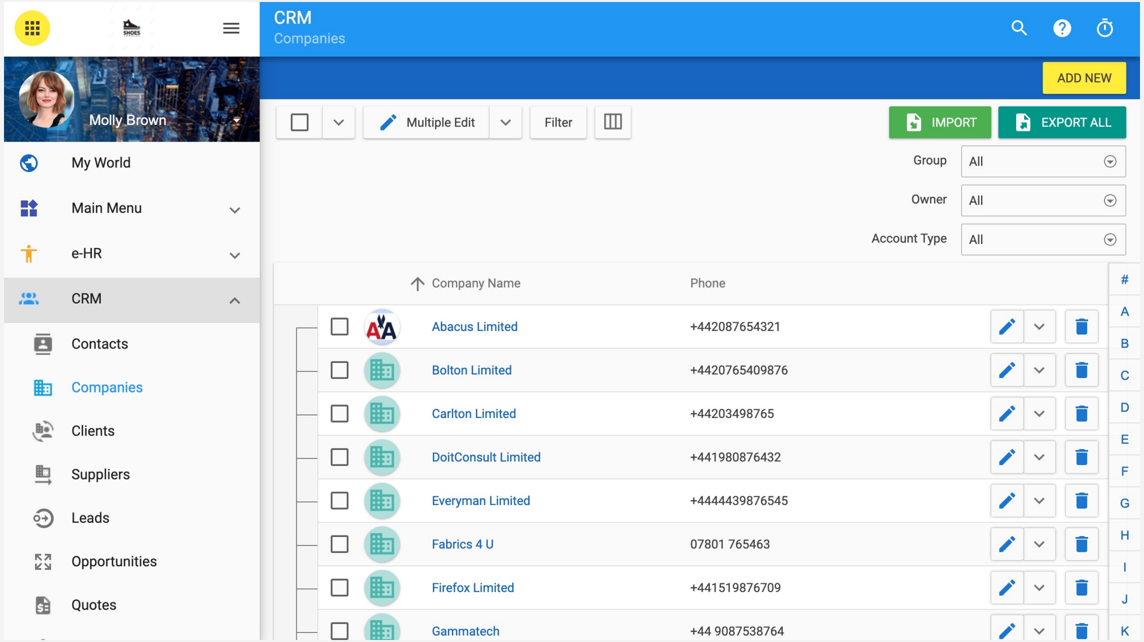
Adding Companies

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.



CRM System

Adding Clients

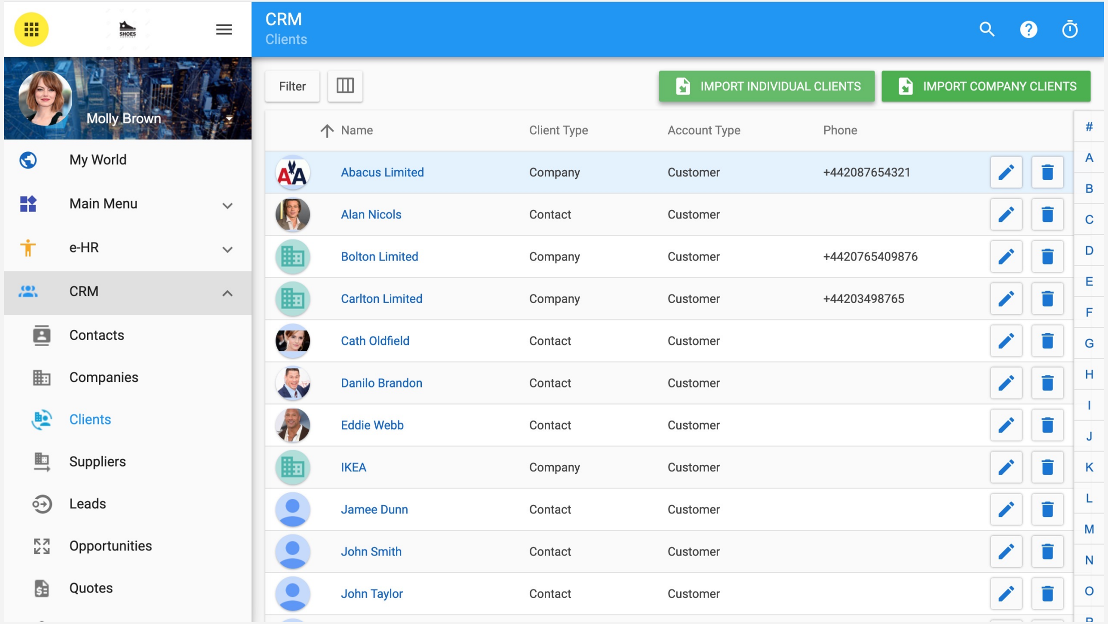
Clients can then be add and attached to companies within the system.

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.



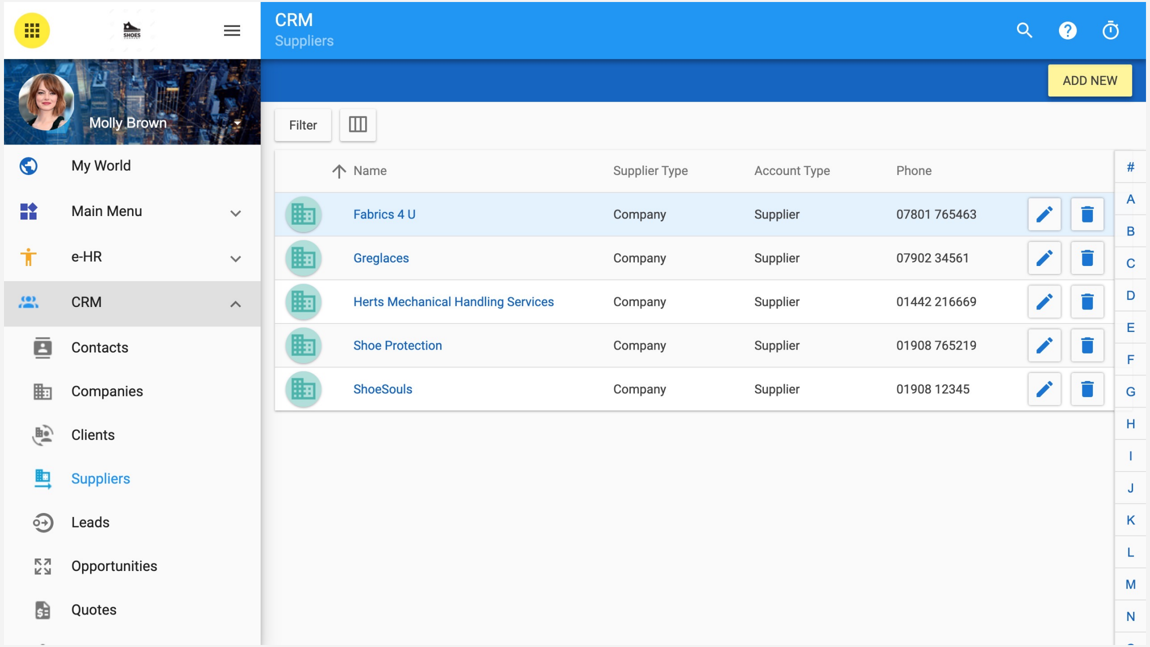
CRM System

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.



When A Lead Come In

Adding A Lead

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

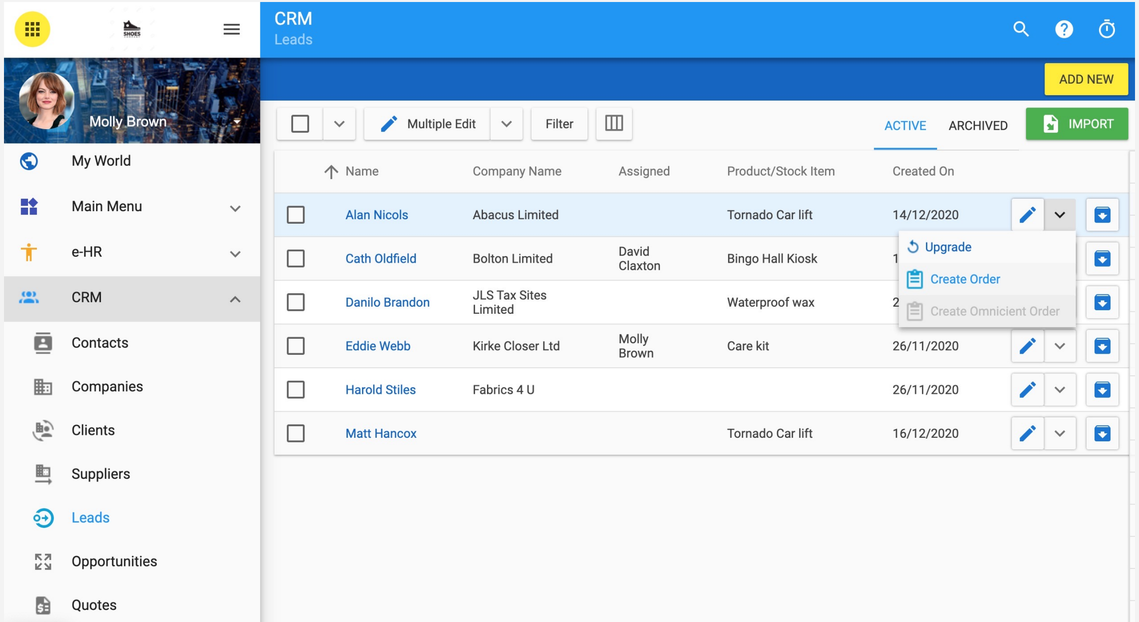
To add a new lead, click the yellow Add New button.

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.



When A Lead Come In

When A Lead Makes An Order

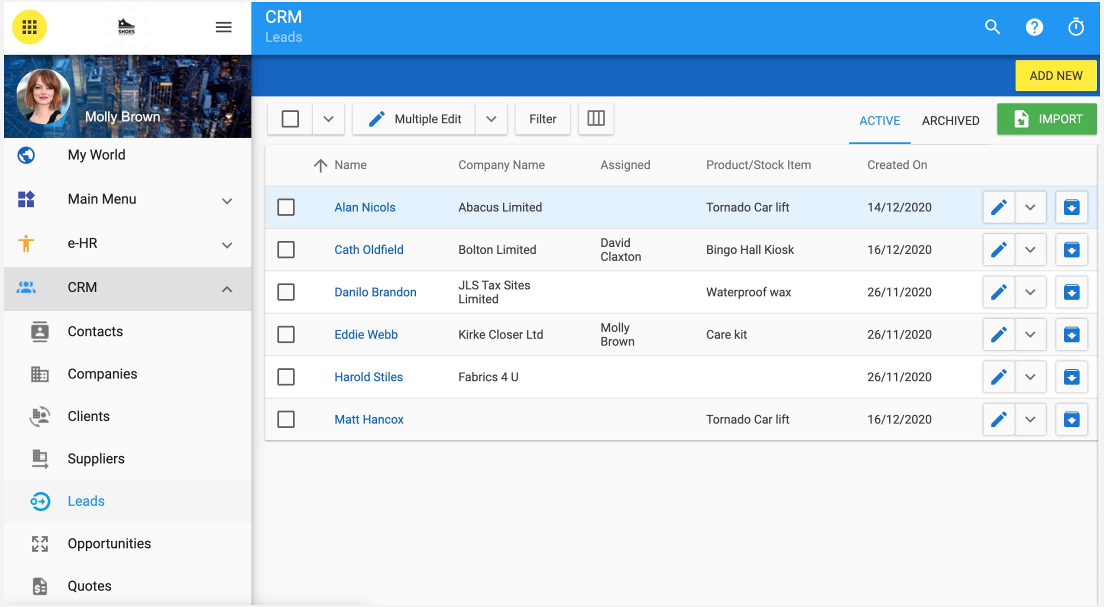
After continued communication with a lead, through text or email form, the hope is for them to make an order.

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.



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.

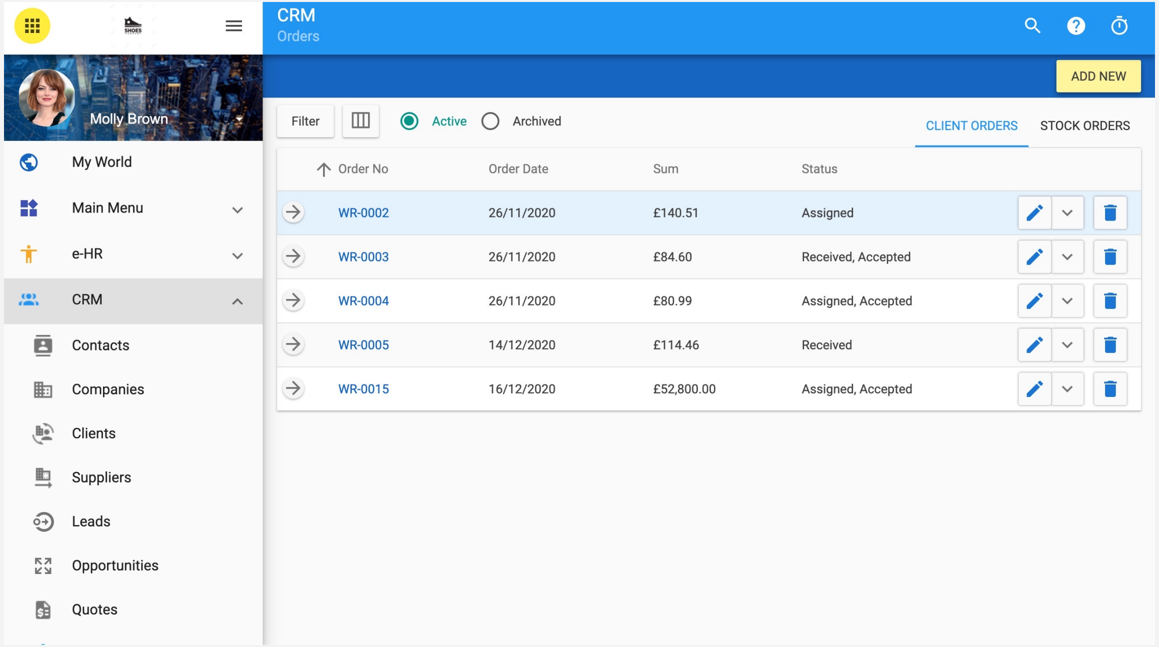
(There is a toggle in the top right, to change between Client Orders or Stock Orders)

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.



When A Lead Come In

Producing a Quote

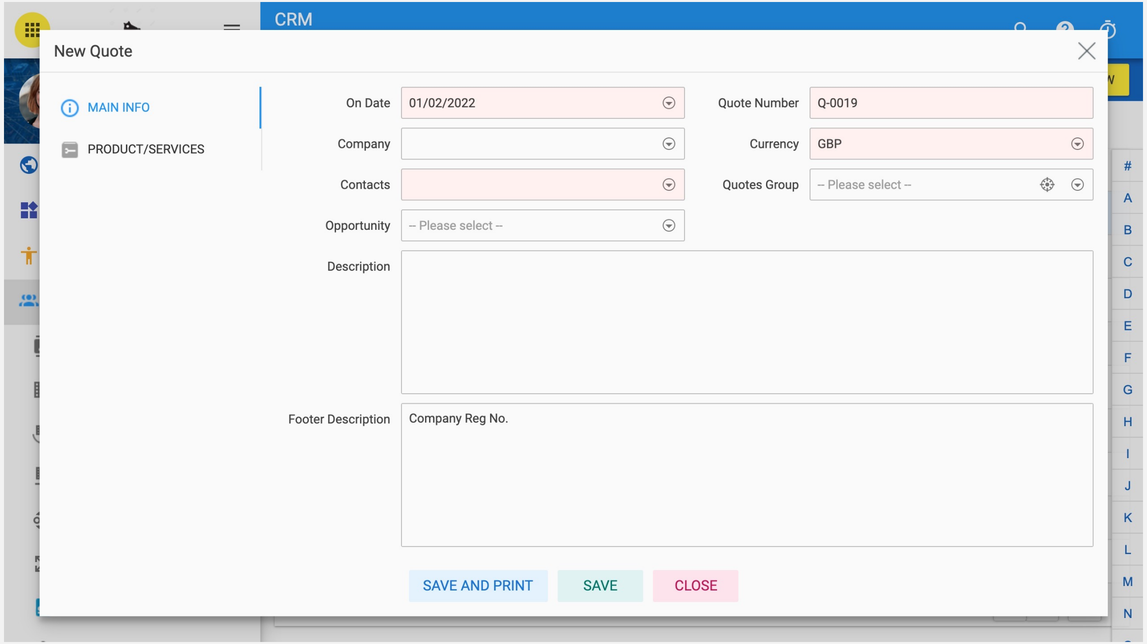
A quote for the price of service can be produced within the system.

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.



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

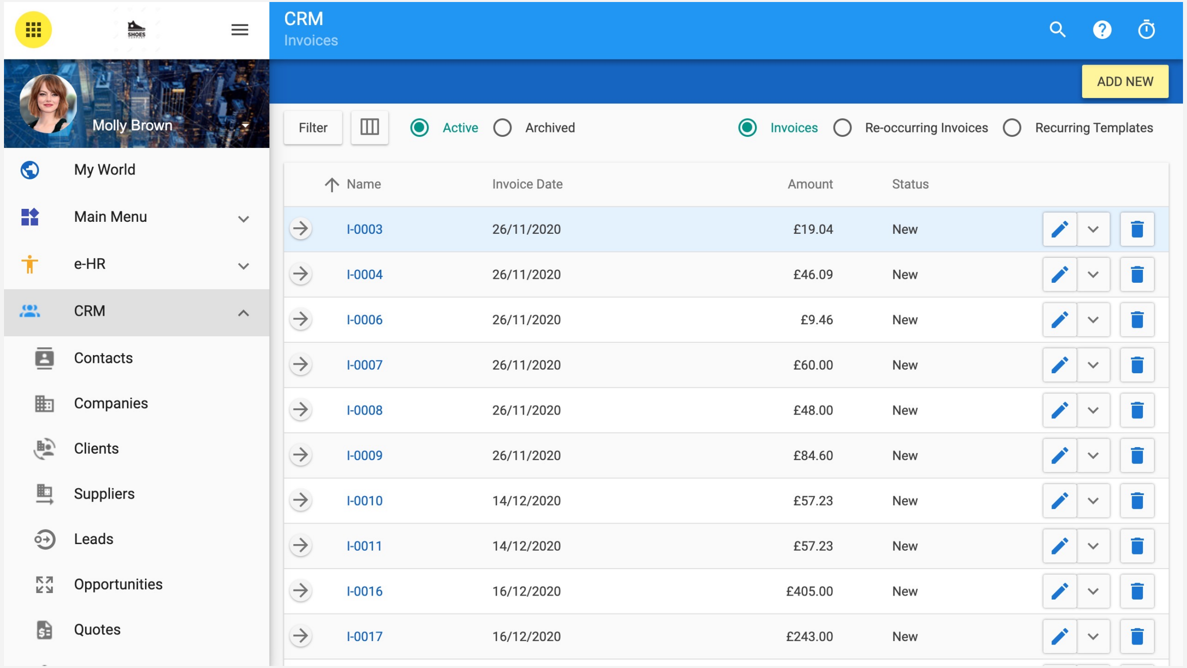
In the top right hand corner click the yellow Add New button.

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.



When A Lead Come In

Mark An Invoice As Paid

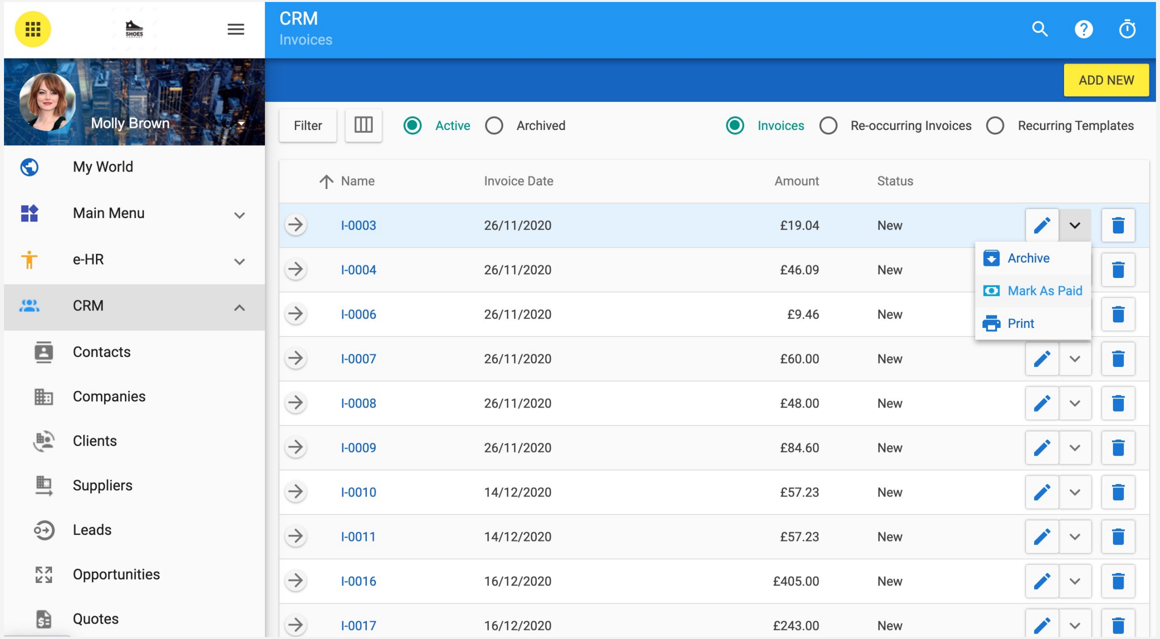
When a customer /client pays the Invoice you need to update the status in the system.

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.



When A Lead Come In

Recorded Communications

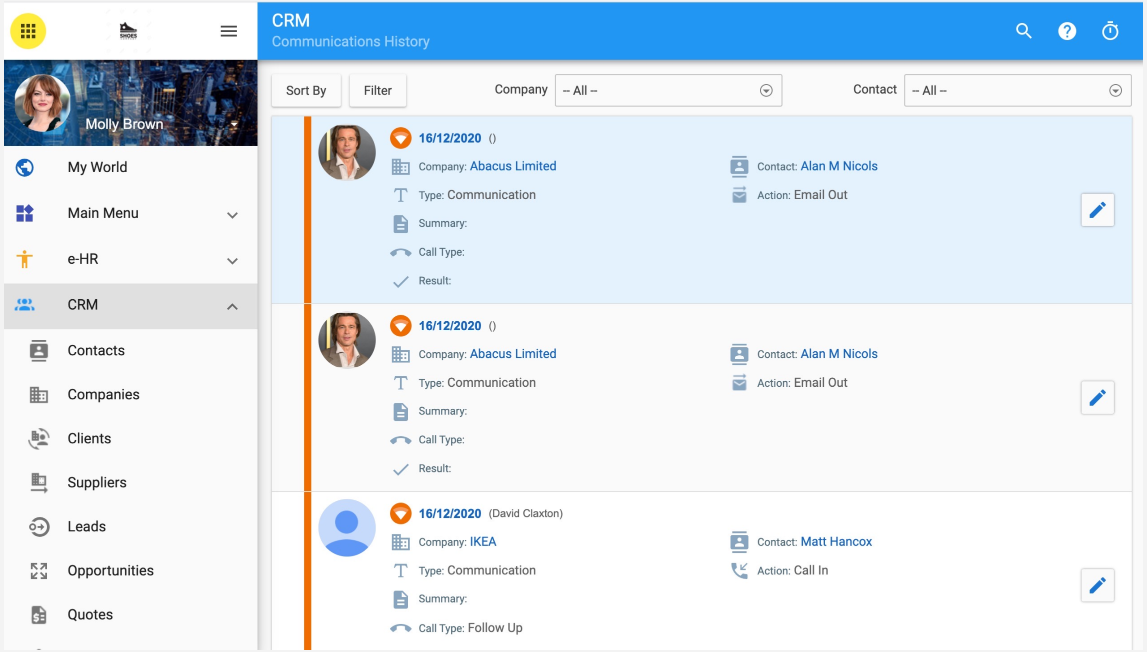
Any communication with a client/customer, whether this is an email, phone call or any other method, will be recorded and stored in the communications History application.

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.



Opportunities in CRM

Adding A New Opportunity

Any new business opportunity can be logged into the system.

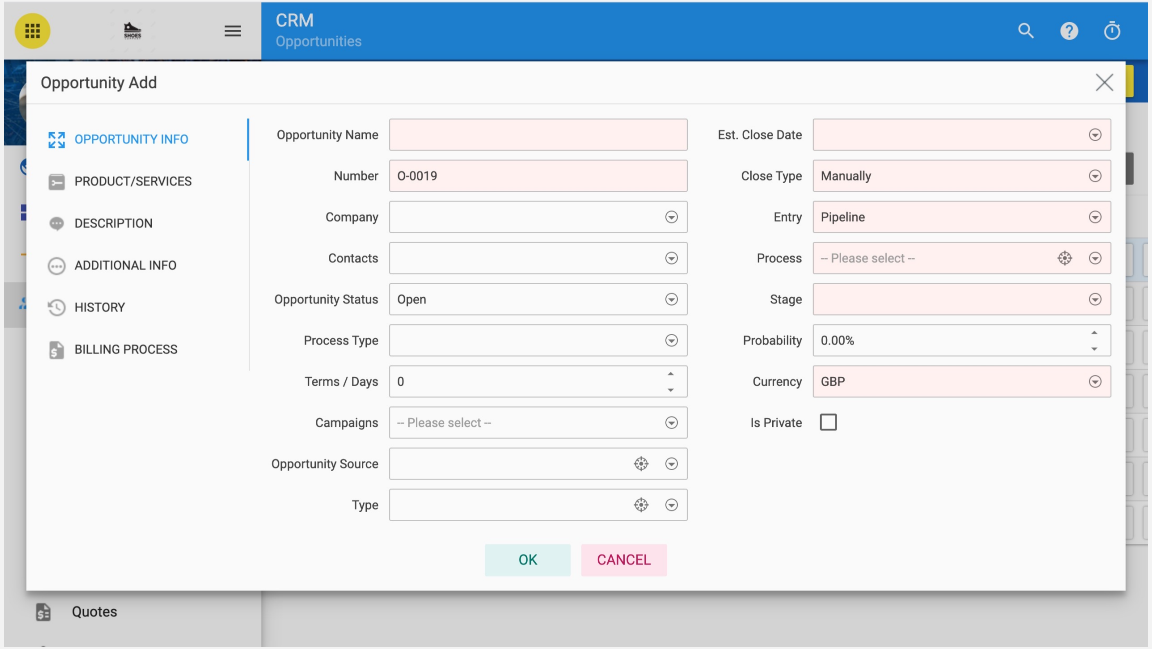
Click the CRM application in the left hand navigation From the drop down this produces, click Opportunities.

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.



The e-HR System

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

DESKTOP / FIXED

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.

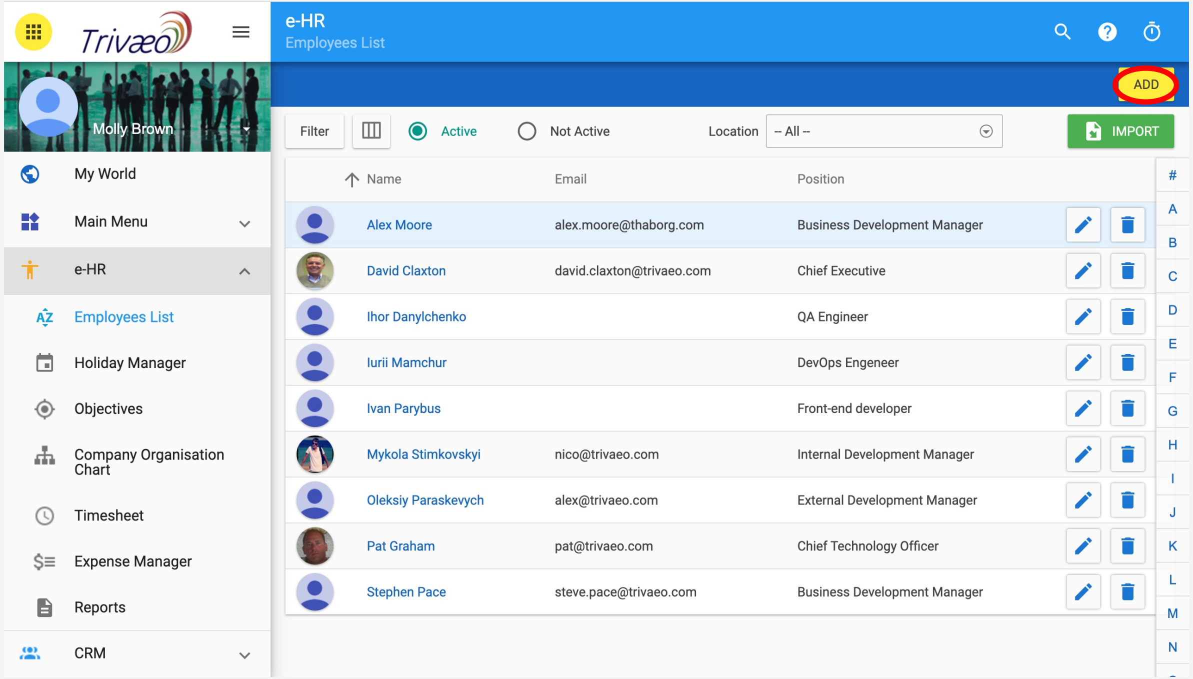
Here you will see a full list view of all current employees.

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.



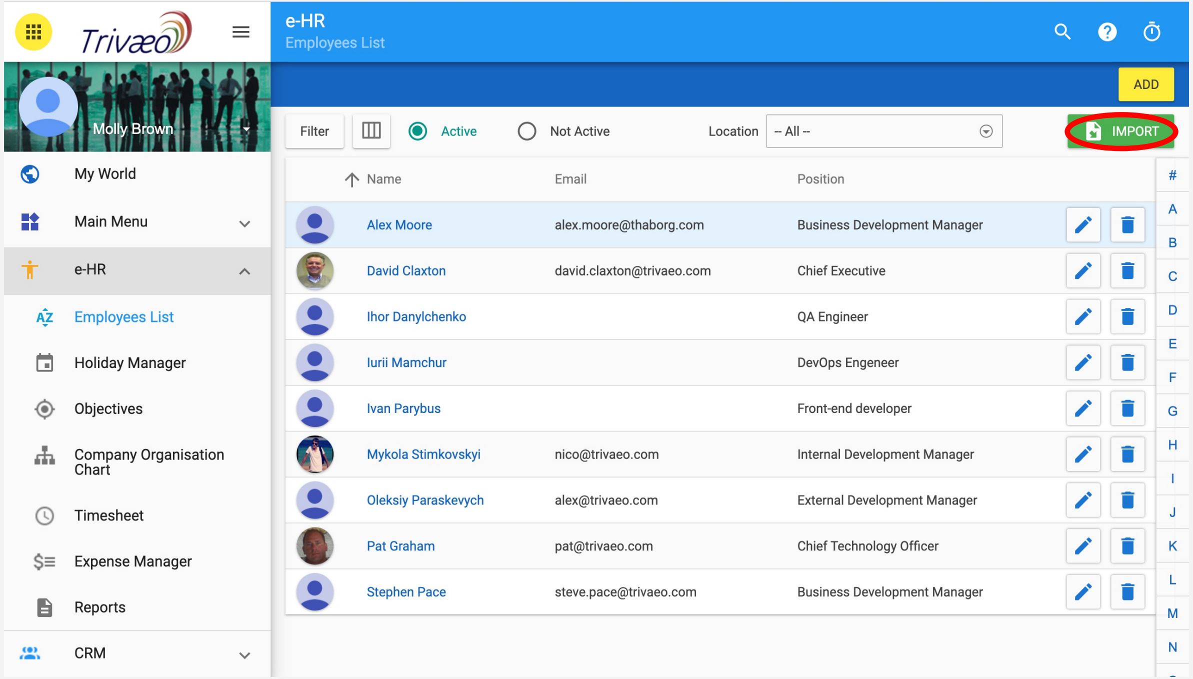
e-HR

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.



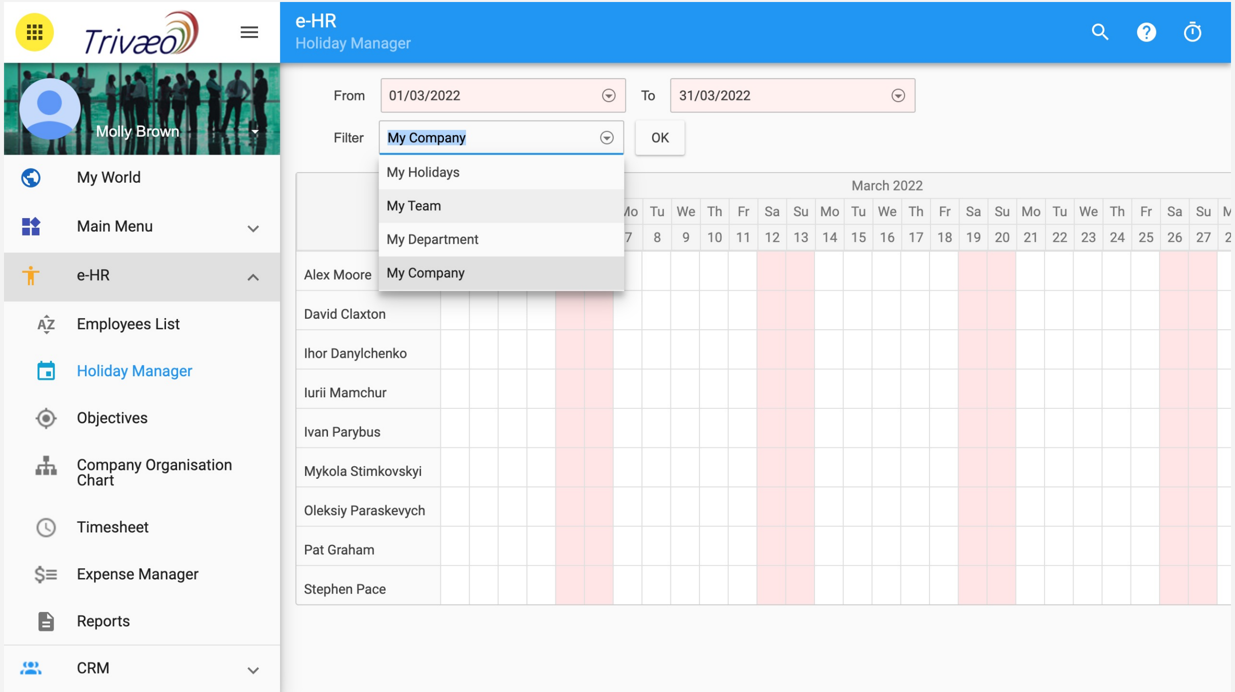
e-HR

The Holiday Manager

Display all upcoming holidays in the Holiday Manager.

Switch between the entire company staff or teams by using the dropdown filter at the top.

Use the ‘From and ‘To’ date selectors to view any time period throughout the year.



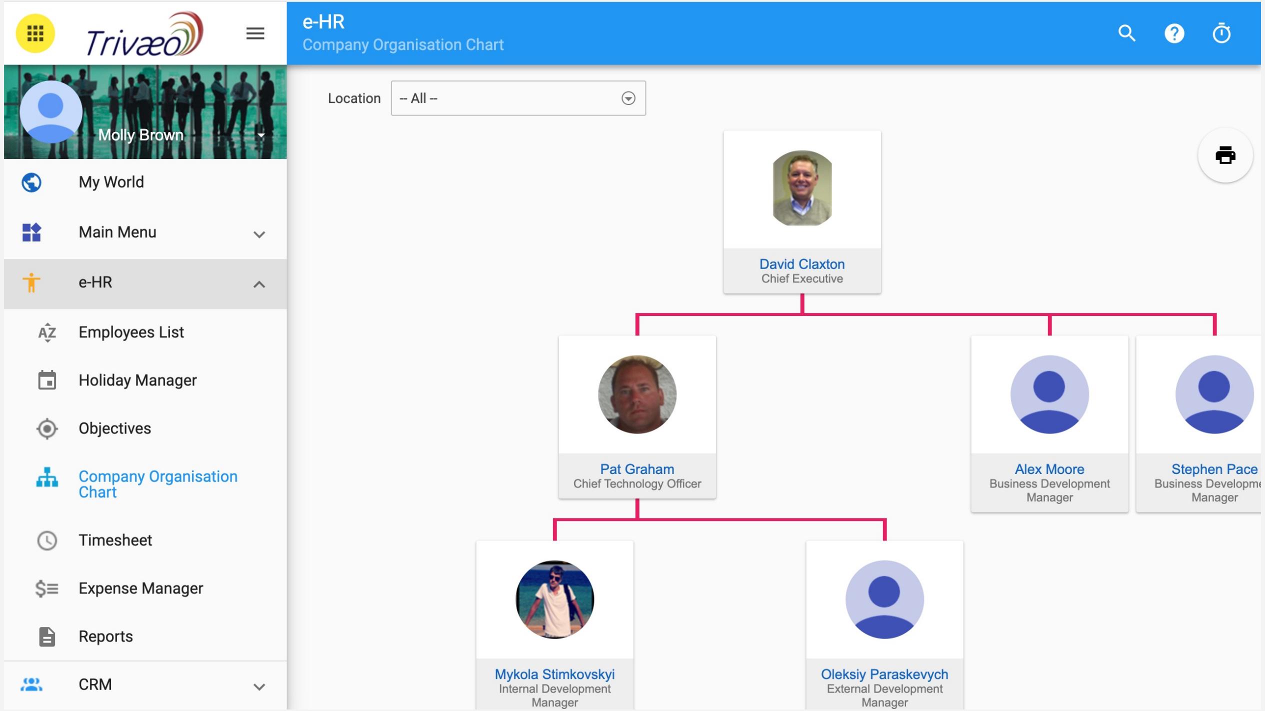
e-HR

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.



e-HR

Time Sheets

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

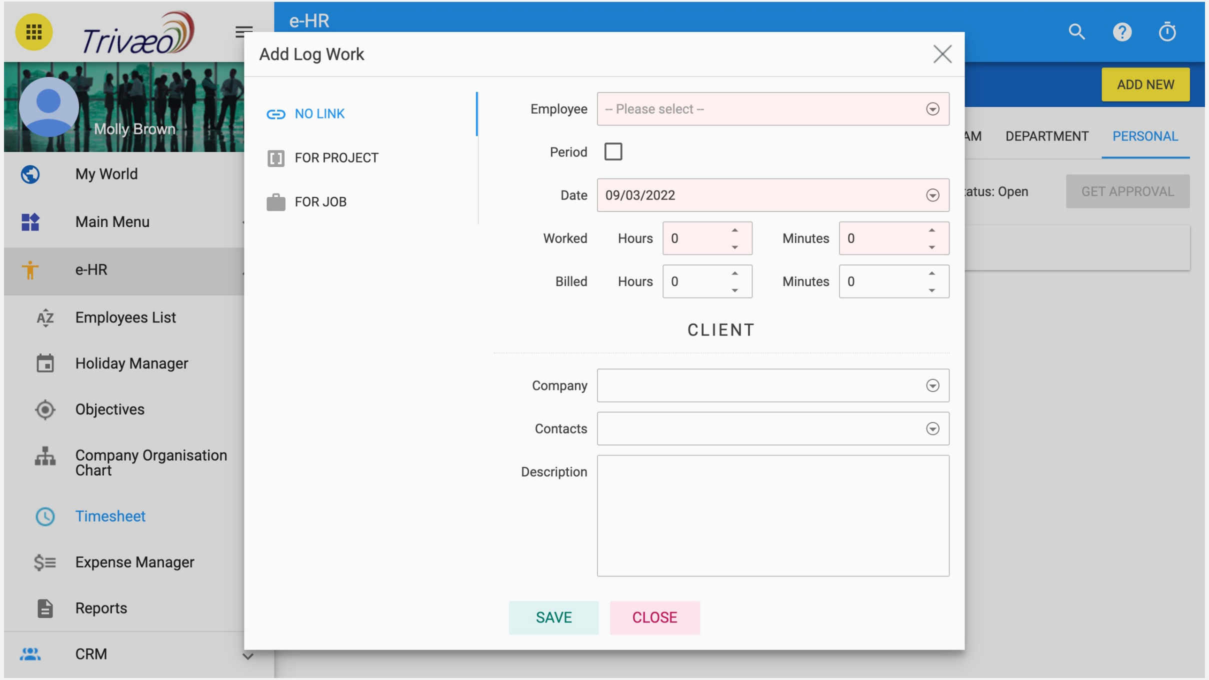
From the drop down this produces, click Timesheet.

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.

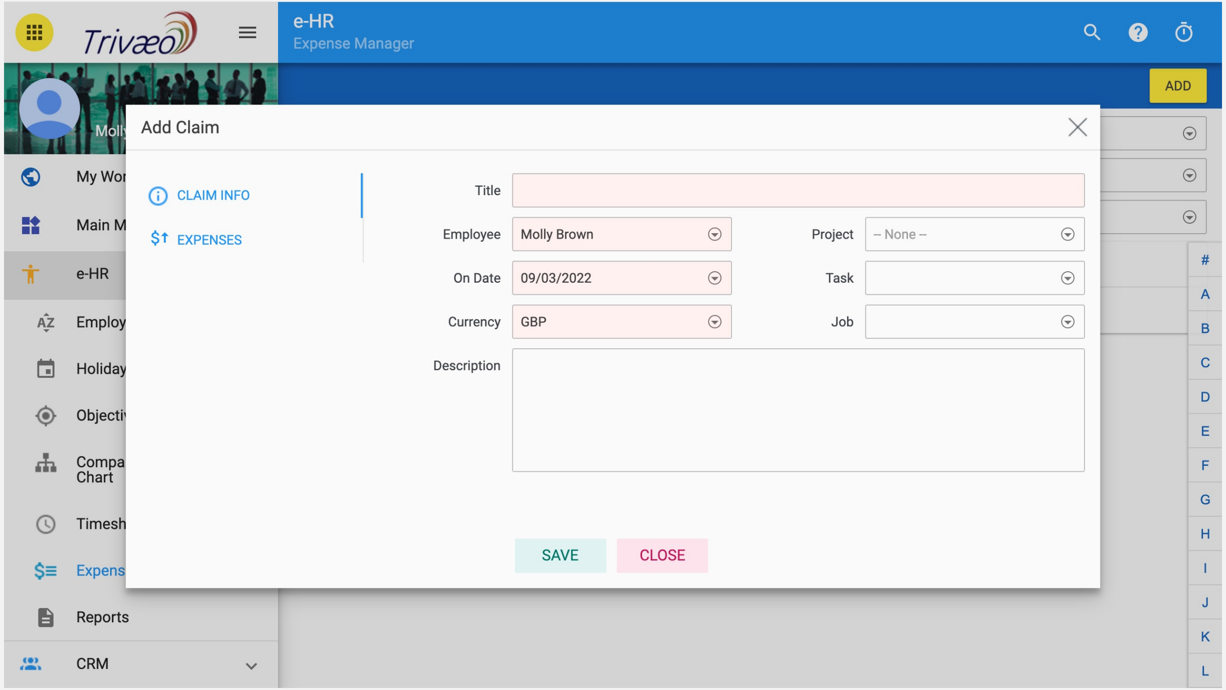
From the drop down this produces, click Expense Manager.

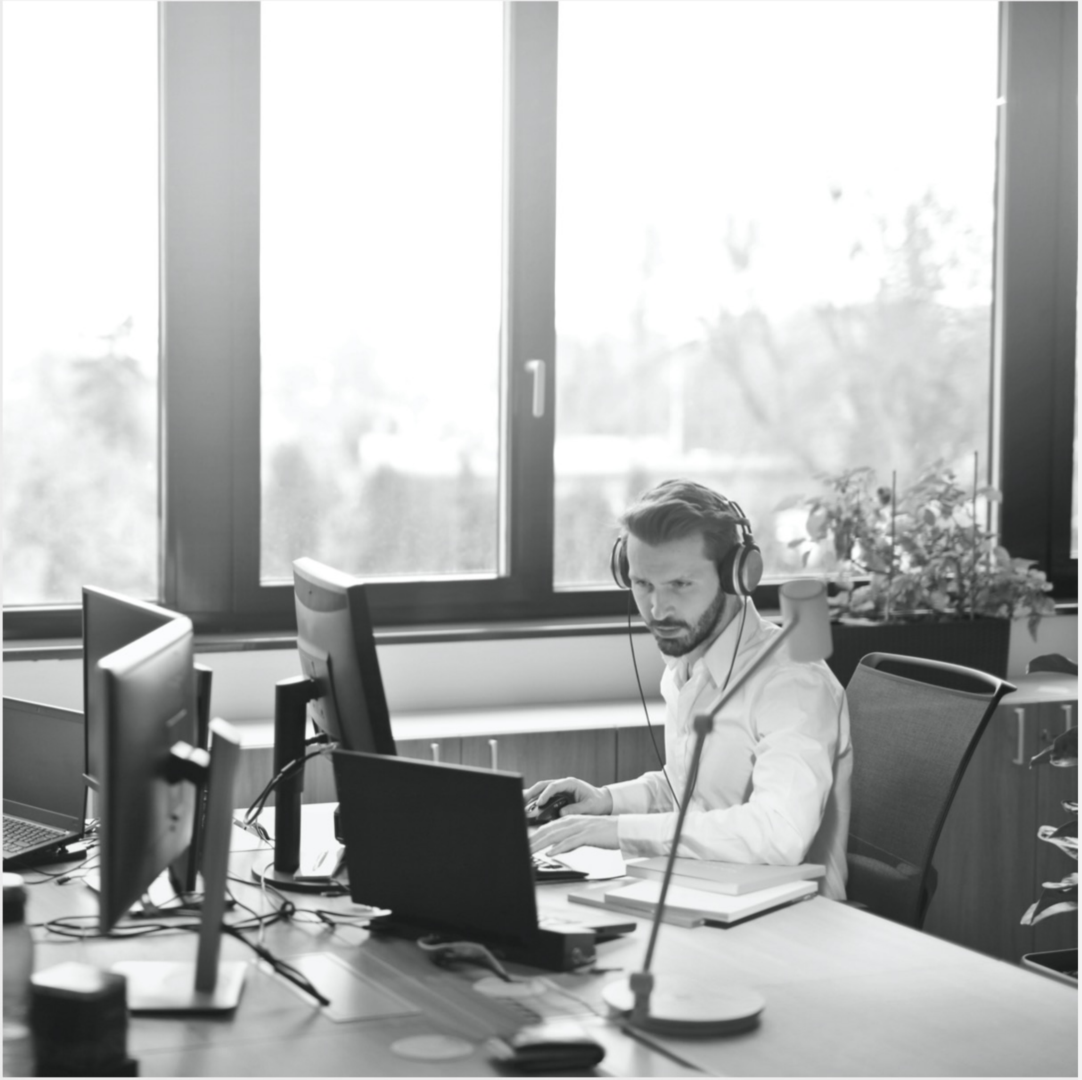
To add a new Expense click the yellow add new button in the top right hand.

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.

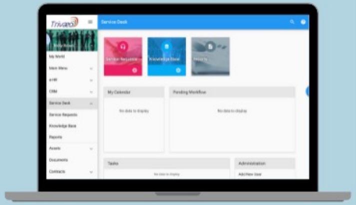




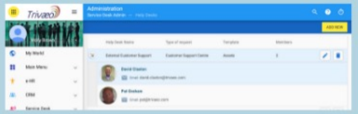
Service Desks

How to set up and use the service desk in Zway

SERVICE DESK PROCESS

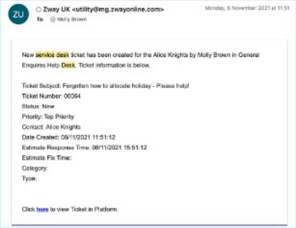


Service Desks can easily be set up in the Zway system for you to handle customer or supplier enquiries.



In your Service Desk Admin, you can assign members of staff to each service desk you provide.

This means that you can assign the best person within each department to answer any queries or solve any problems.



Zway UK <utility@mg.zwayonline.com>
Monday, 8 November 2021 at 11:51
To: Molly Brown

New service desk ticket has been created for the Alice Knights by Molly Brown in General Enquires Help Desk. Ticket information is below.

Ticket Subject: Forgotten how to allocate holiday - Please help!
Ticket Number: 00064
Status: New
Priority: Top Priority
Contact: Alice Knights
Date Created: 08/11/2021 11:51:12
Estimate Response Time: 08/11/2021 15:51:12
Estimate Fix Time:
Category:
Type:

Click here to view Ticket in Platform.

When a service desk ticket is put in by a customer/supplier, the assigned employee will receive an email.

There is a link at the bottom of this email that takes you directly to the Zway System to review the service desk ticket.

Zway has the notion of "Knowledge Base" inside of your Service Desk application.
Here you can add generic responses or methods to solve common issues that your customers may face.
Your employees can access the Knowledge base when handling a request, to ensure the right process or response.

ADD NEW

A New Knowledge Base can be created by clicking the yellow'Add New' button

Communications between the employee and the customer/supplier can be documented and stored in the system.

Once asolution has been found or an answer has been given, the service ticket can be closed.

It can still be stored in the system, as an example for other employees, if they experience the same query.

Service Desks

Setting Up A Service Desk

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

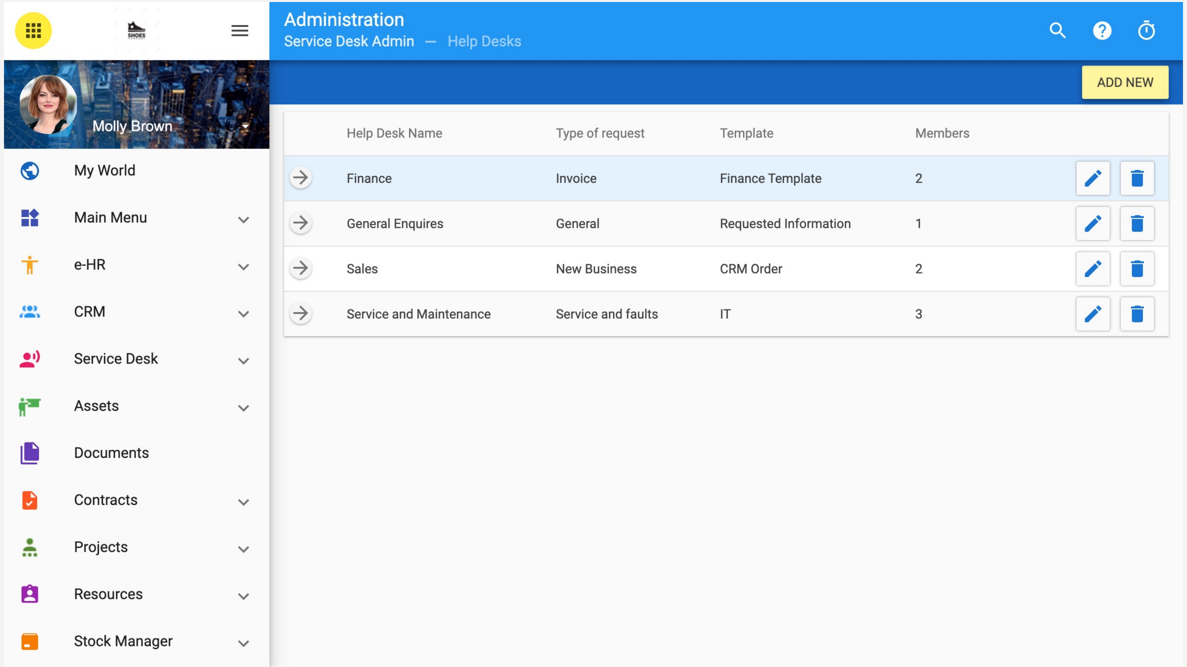
From the drop down this produces, click Service Desk Admin.
From here, click Help Desks within the Administration box.

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



Service Desks

Service Requests

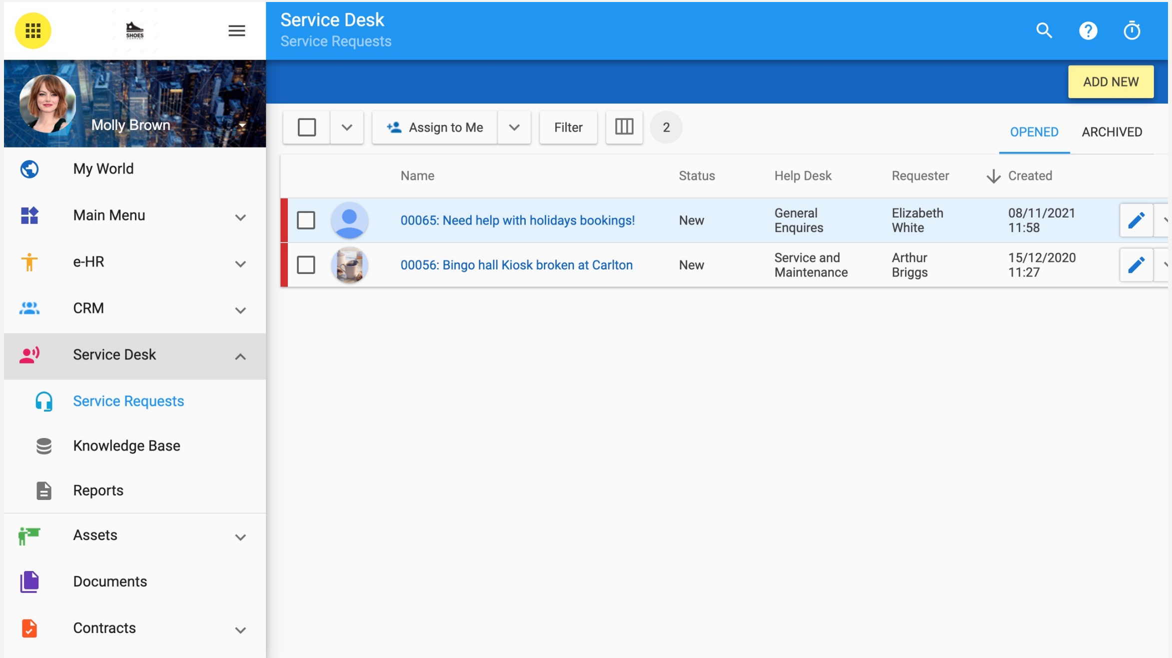
Any service request that comes into the system will be logged in the Service Requests Desk

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.



Service Desks

Service Requests

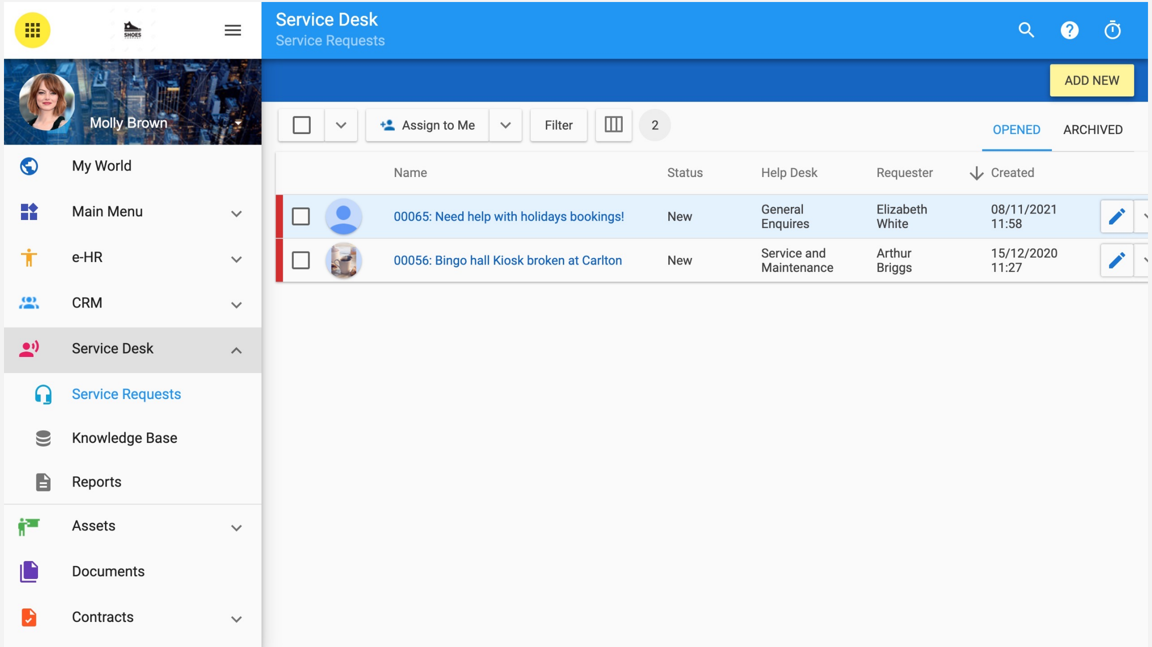
To add a new service request click the yellow add new button in the top.

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.



Service Desks

Knowledge Base

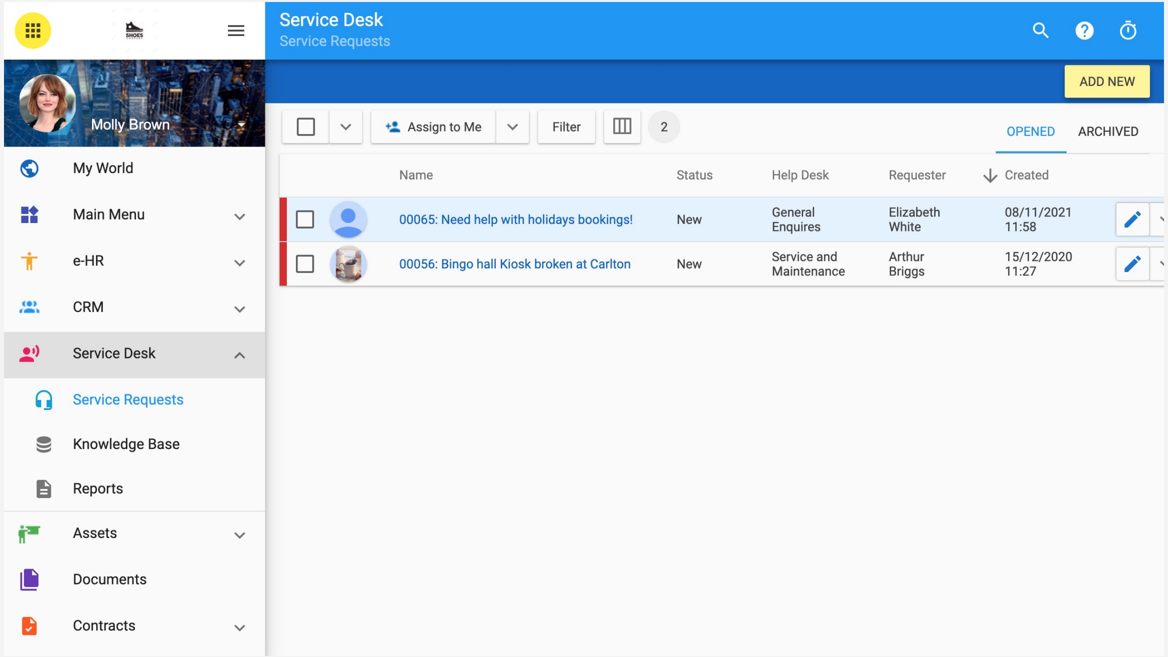
You can use the knowledge base to log external/internal solutions to a variety of problems

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.



Assets

How to set up and manage assets in Zway

Asset Management

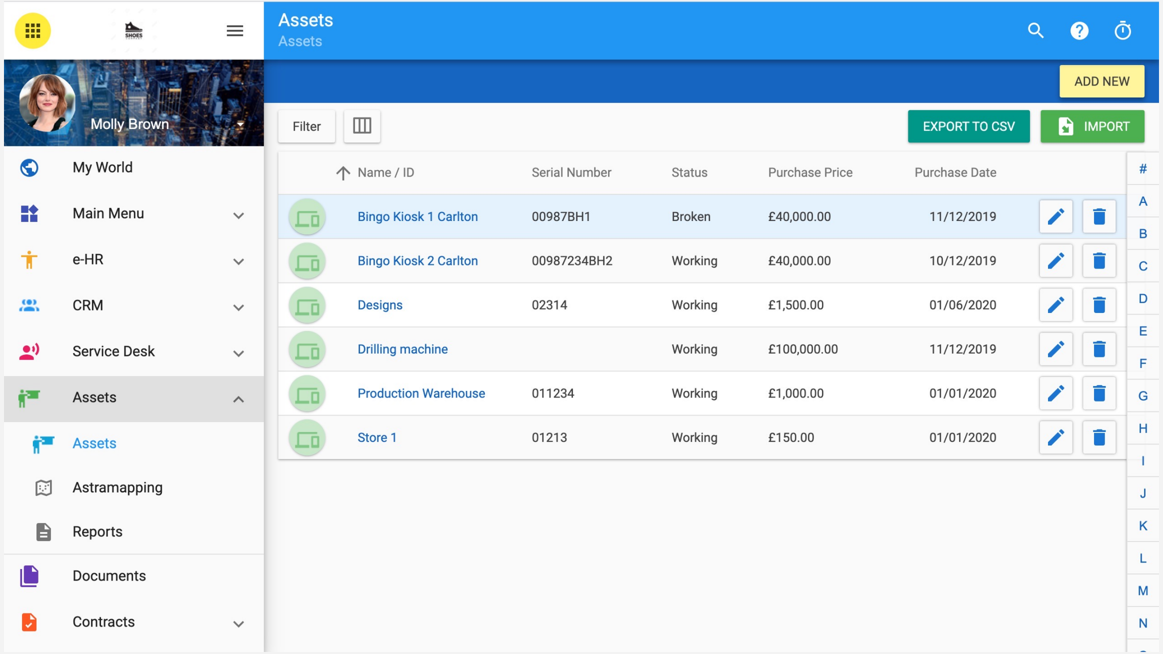
Importing Assets

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.



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.

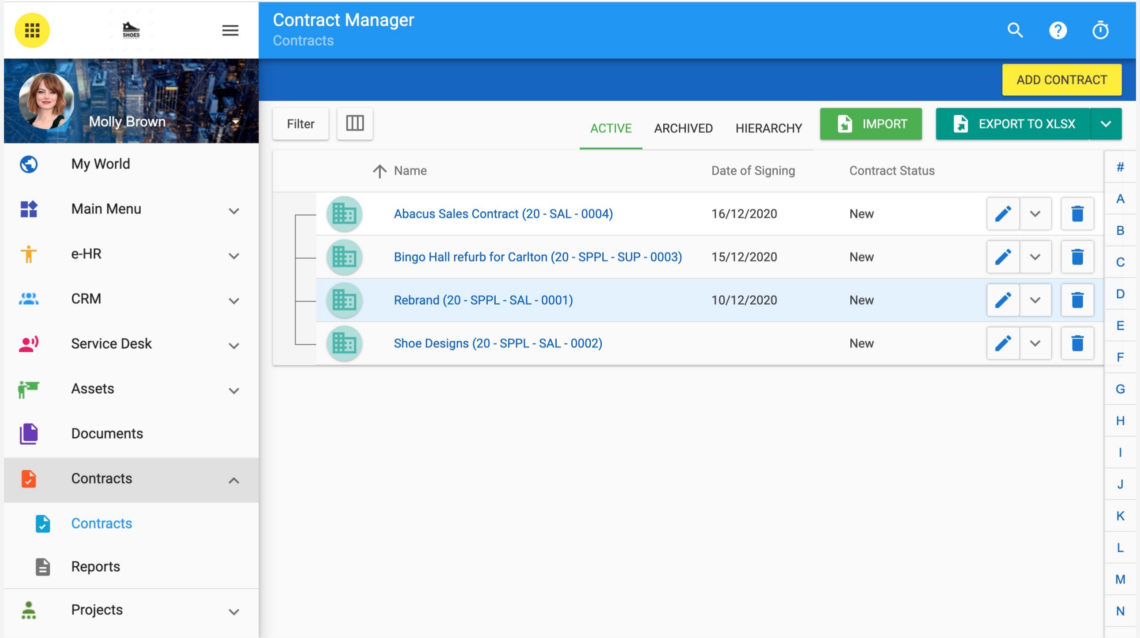
To add a new contract singularly, click the yellow add new button in the top right hand

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

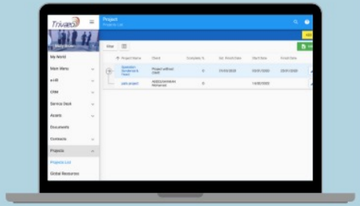


Projects

How to set up and manage projects in Zway

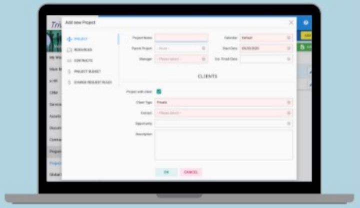
PROJECTS PROCESS

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.

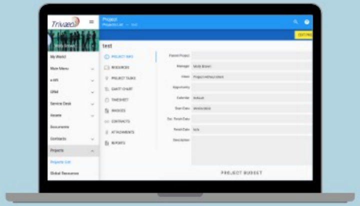


ADD NEW

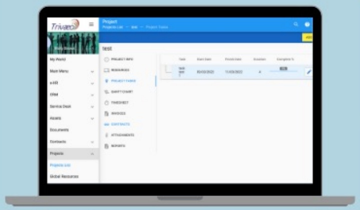
A New project can be created by clicking the yellow 'Add New' button



All of the pink boxes on the form are mandatory to complete.

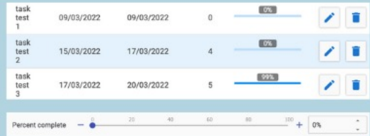


Clicking your project name opens it up to a full view. Here you can add additional information. Simply click the approprarite tab on the left hand side



Add all of the tasks that are required within the project.

As you add tasks, they will be put into a Gantt Chart. Here you have a full view of the entire project from start date to finish.



When tasks are being complete or completed you can update their status using the progress bar. This lets everyone in the system know what stage each task of the project is in.

Even when a Project is complete, it will be saved in the system for you to come back to.

Projects

Adding Projects

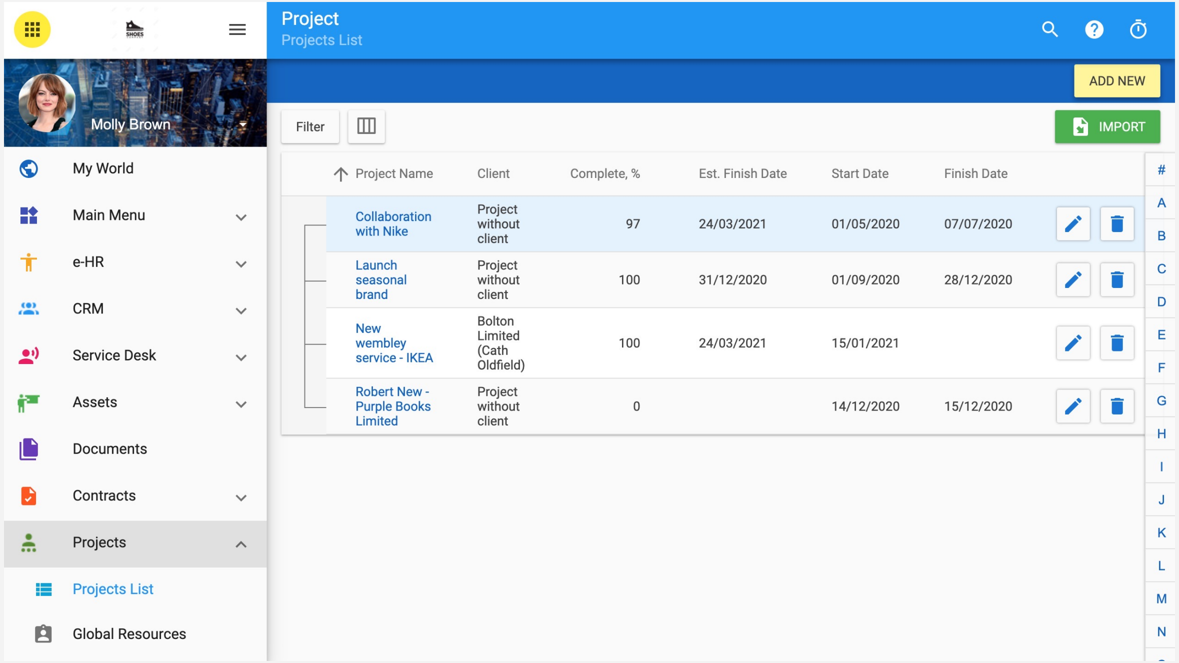
From the left hand navigation click Projects
From the drop down this produces, click Projects List.

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.



Projects

Gantt Charts

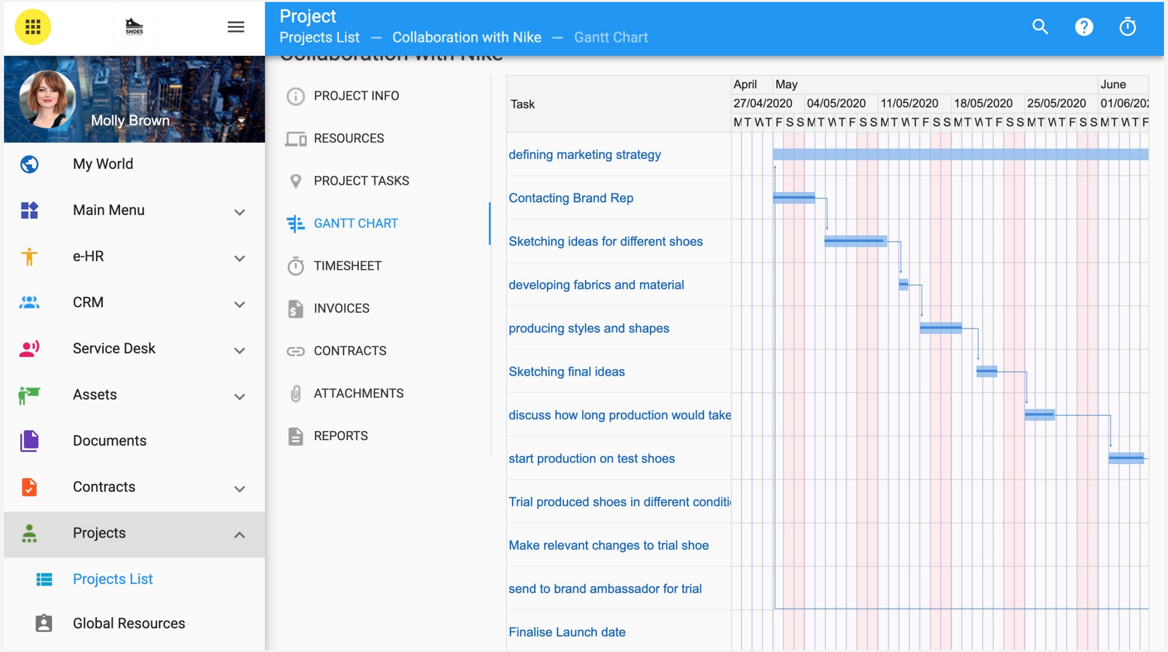
Inside of projects, you can create Gantt Charts. These are great for mapping processes/steps throughout the given period of time

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

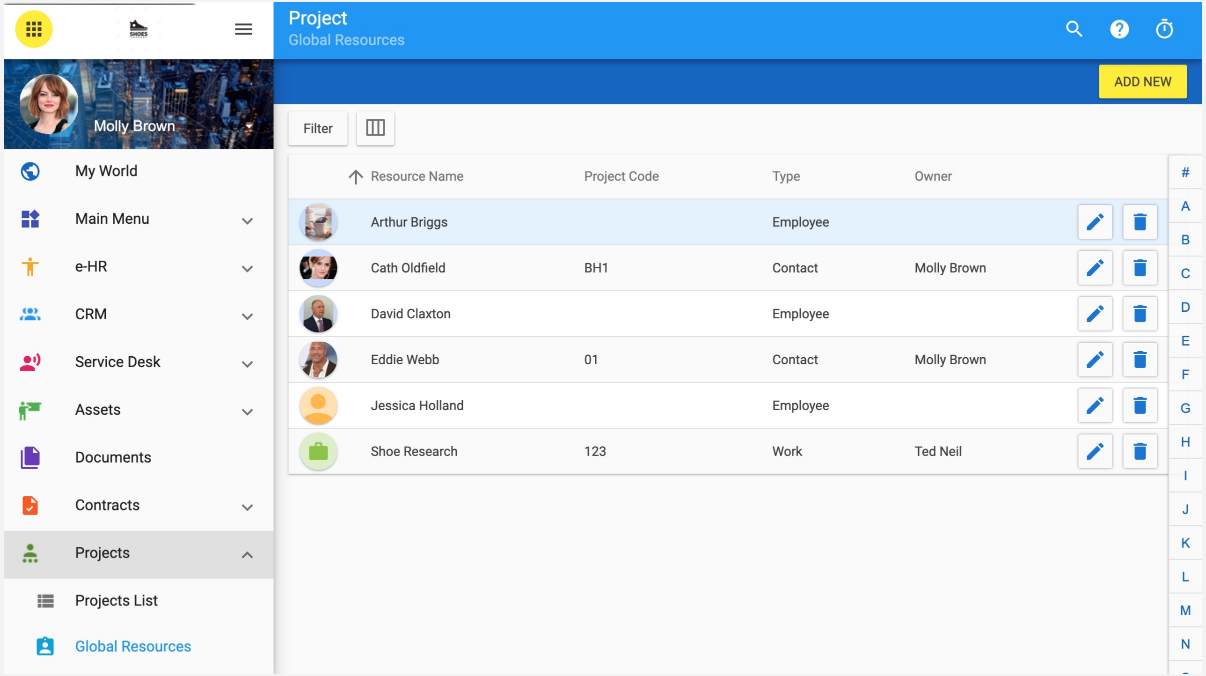
Global Resources are a collection of people, companies etc. that can be used/contracted for help in the project

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



Resources

How to set up and manage resources in Zway

DESKTOP / FIXED

Resources

Resource Calendar

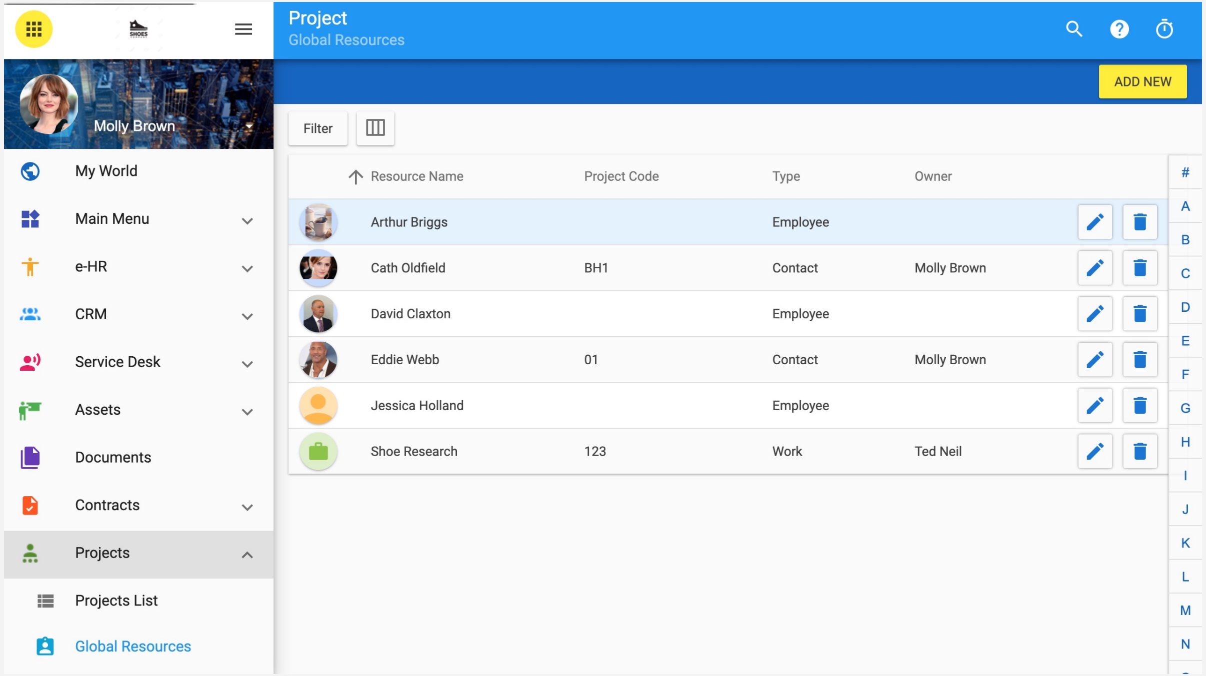
The resource calendar maps out wen all resources are in use across the entire month

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 entire 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



Resources

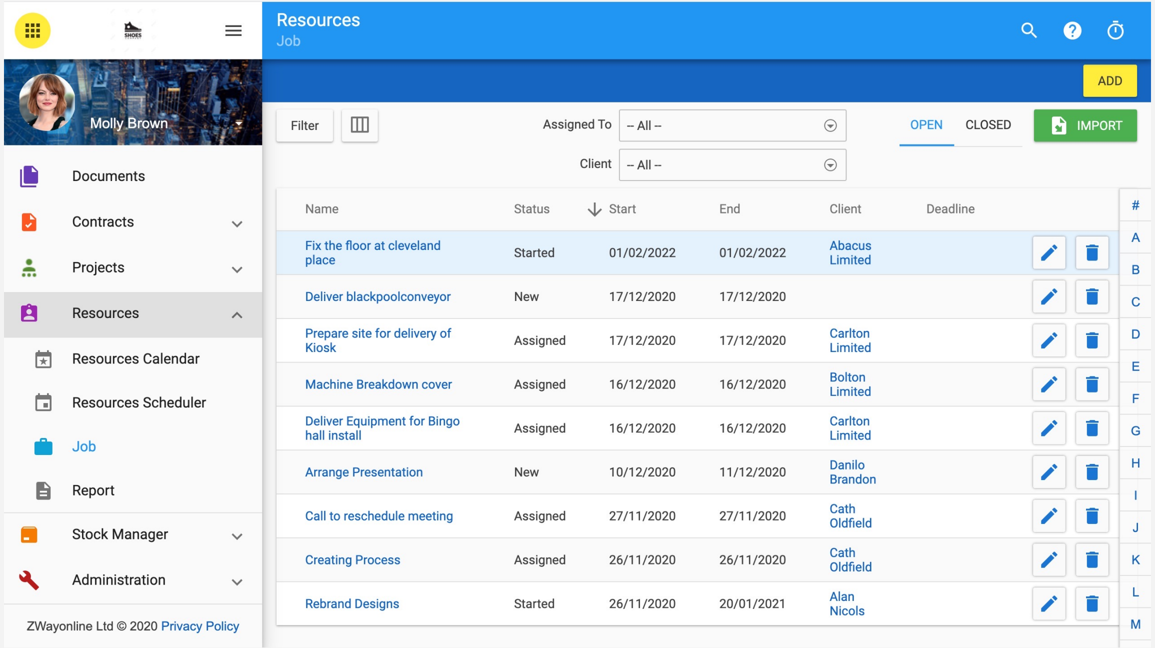
Adding Jobs

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

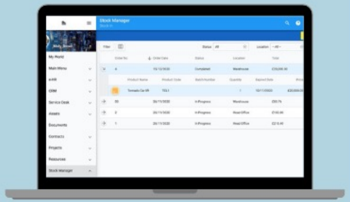
This will then appear on your Resource calenda much like the other jobs in the system.



Stock

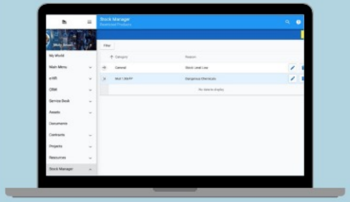
How to set up and manage your Stock in Zway

STOCK MANAGEMENT PROCESS



Stock is imported into the system using our multiple import feature.

It can then be document, updated etc within your Zway system.

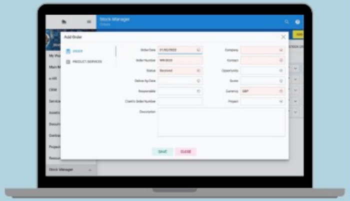


You can ideintify certain products/stock items as 'Restricted' due to dangerour chemicals or any other reason.

Specific clients can be granted 'Special Pricing' of products thanks to their loyalty or specific deals.

Be sure to document these specific prices in the "Customer Price Manger" Application.

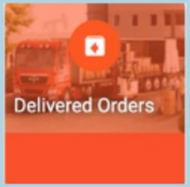
Your stock can then be published to sales channels (where appropriate)



When an Order is made, the stock is linked. This is reflected across all areas of the system.

Once an Order is fulfilled and sent out to the customer, you can use the In/Out Tracking in Zway to monitor its progress and send an arrival time and date.

Depending on the features and functionalities of your system you can also send your customer a tracking code.,



Once an Order has been delivered, its status can be updated and the order will now be stored in the 'Delivered Orders' application.

DESKTOP / FIXED

Stock Manager

Stock Coming In

Manage stock coming in, with the Stock In application

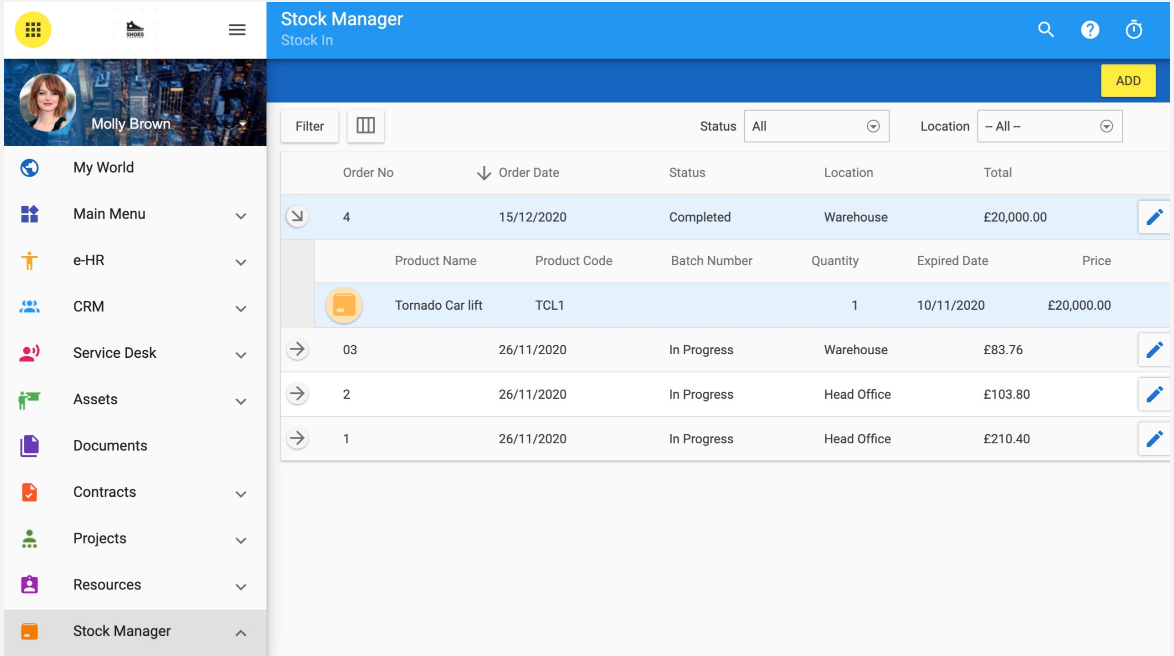
From the left hand navigation, click Stock Manager
From the drop down this produces, click Stock In

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



Stock Manager

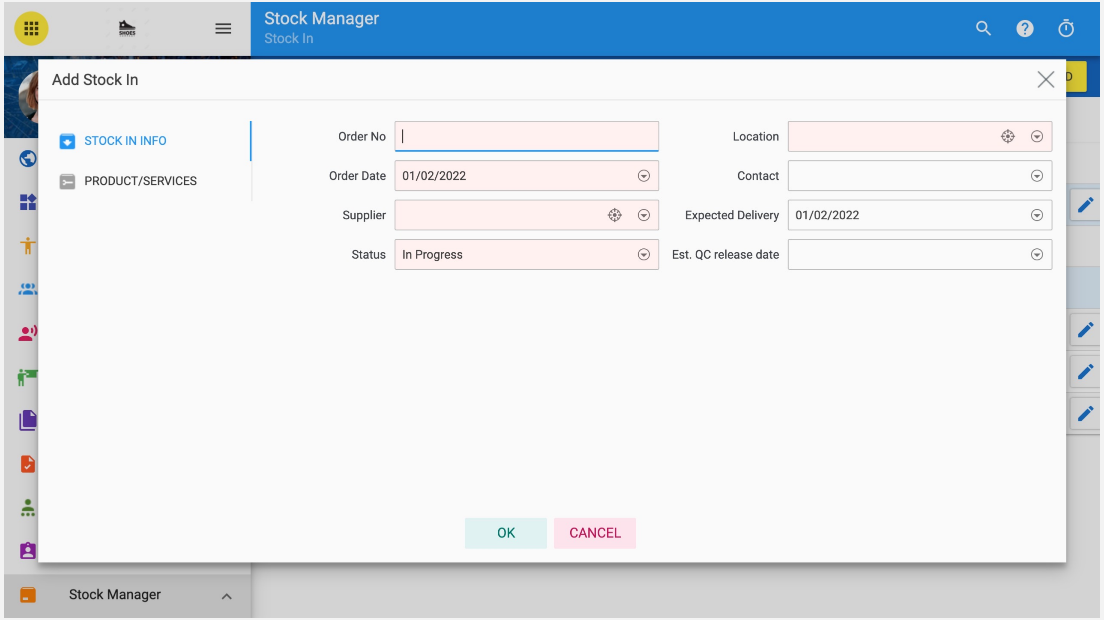
Add New - Stock Coming In

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



DESKTOP / FIXED

Stock Manager

Stock Going Out

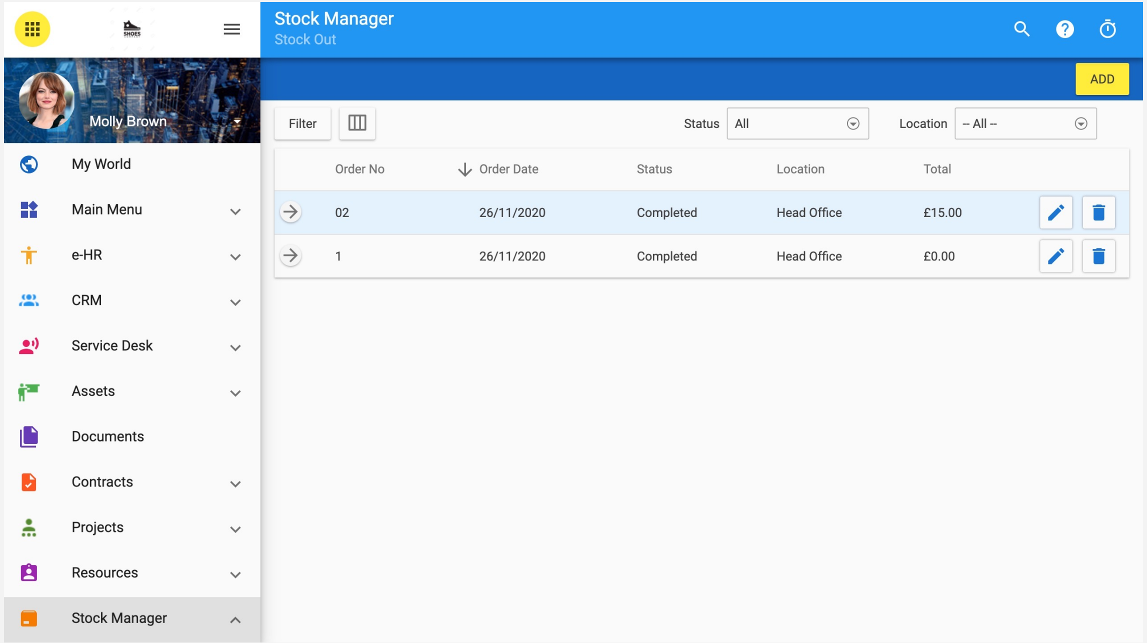
Manage stock going out, with the Stock Out application

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.



Stock Manager

Add New - Stock Going Out

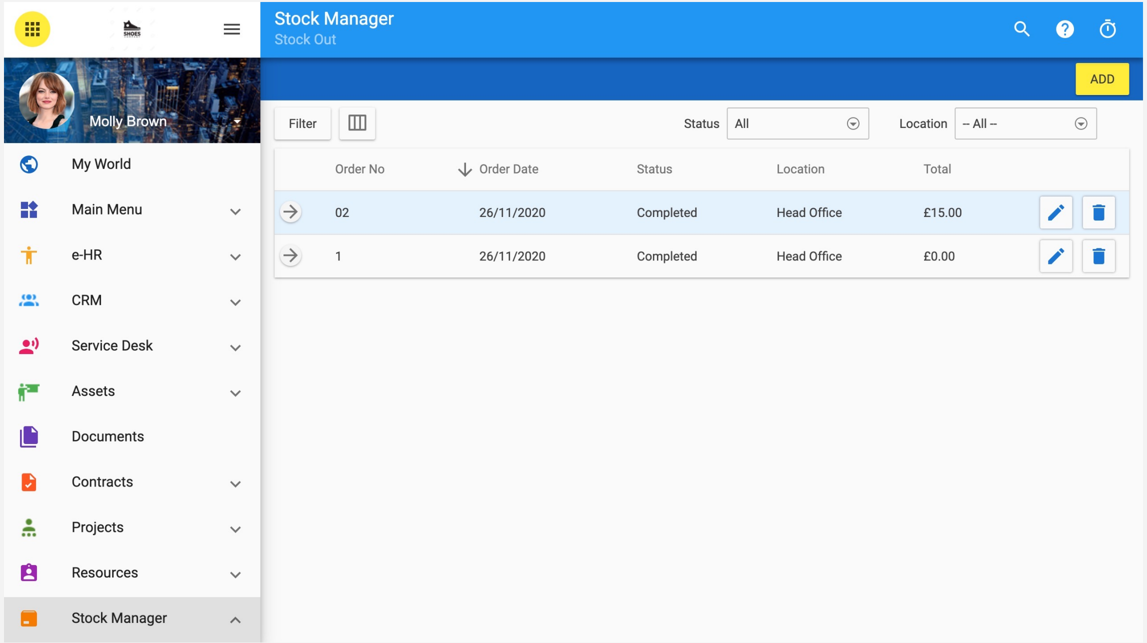
To add a new order of Outgoing stock, click the yellow Add button in the top left corner

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.



DESKTOP / FIXED

Stock Manager

Orders

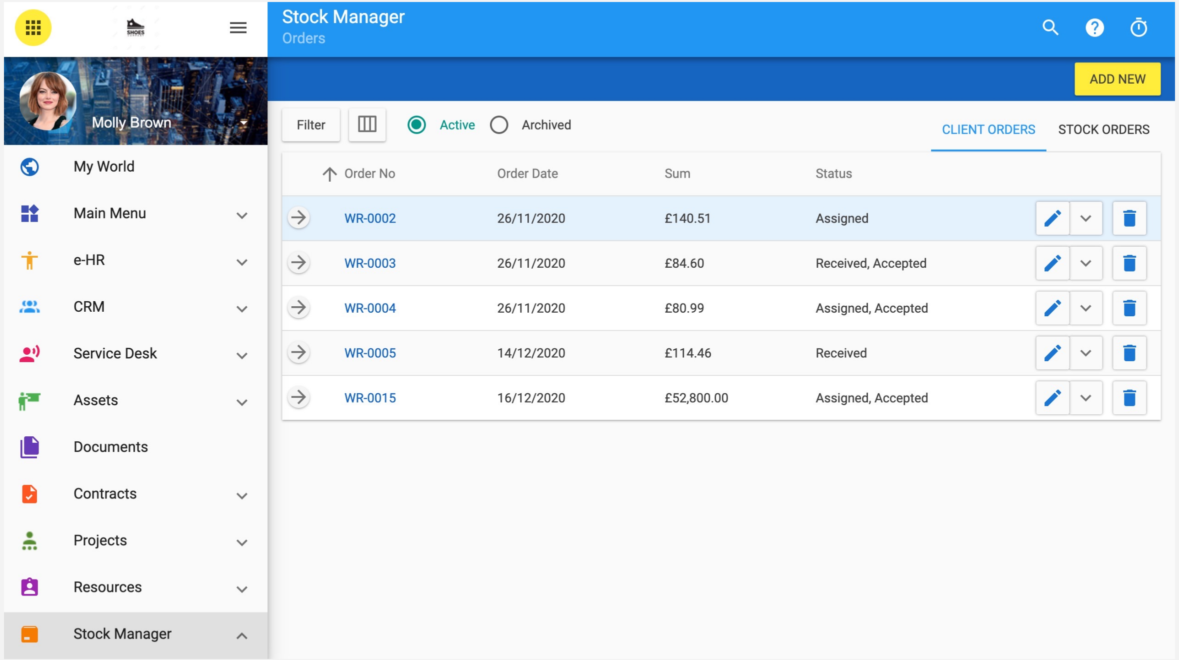
From the left hand navigation, click Stock manager
From the drop down this produces, click Orders

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.



Stock Manager

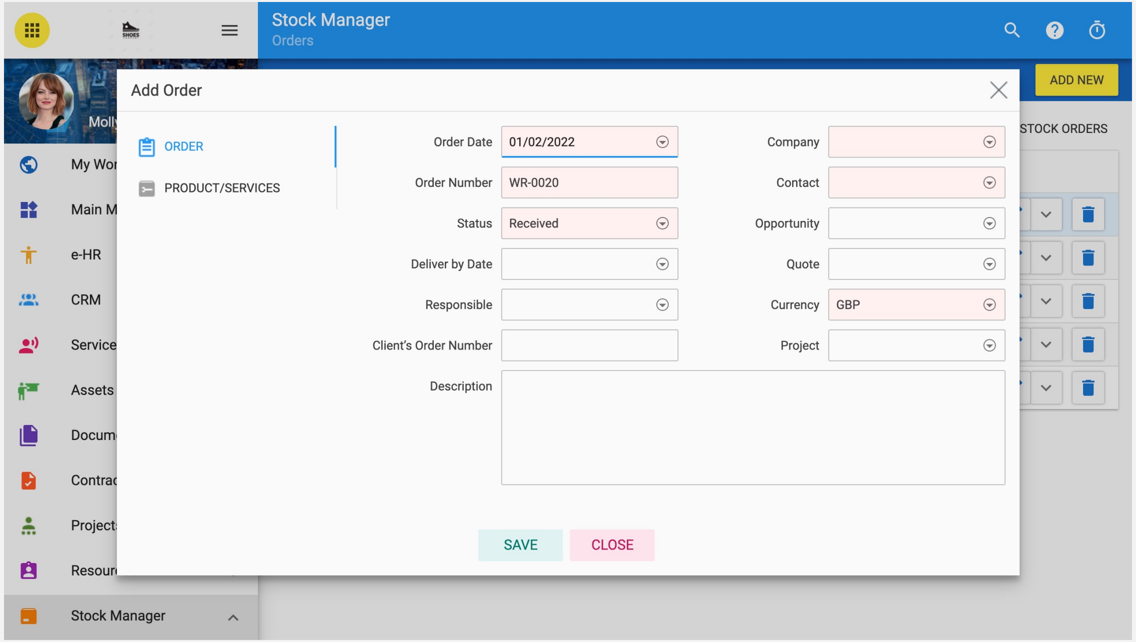
Add New - Orders

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.

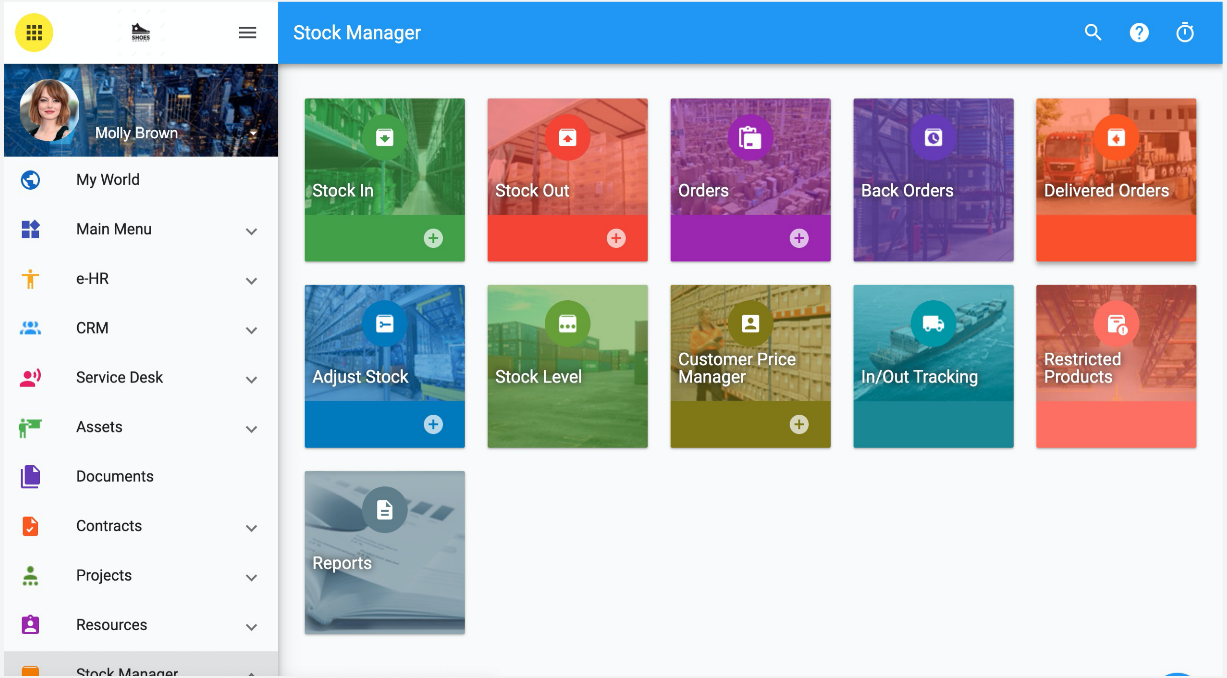


Stock Manager

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

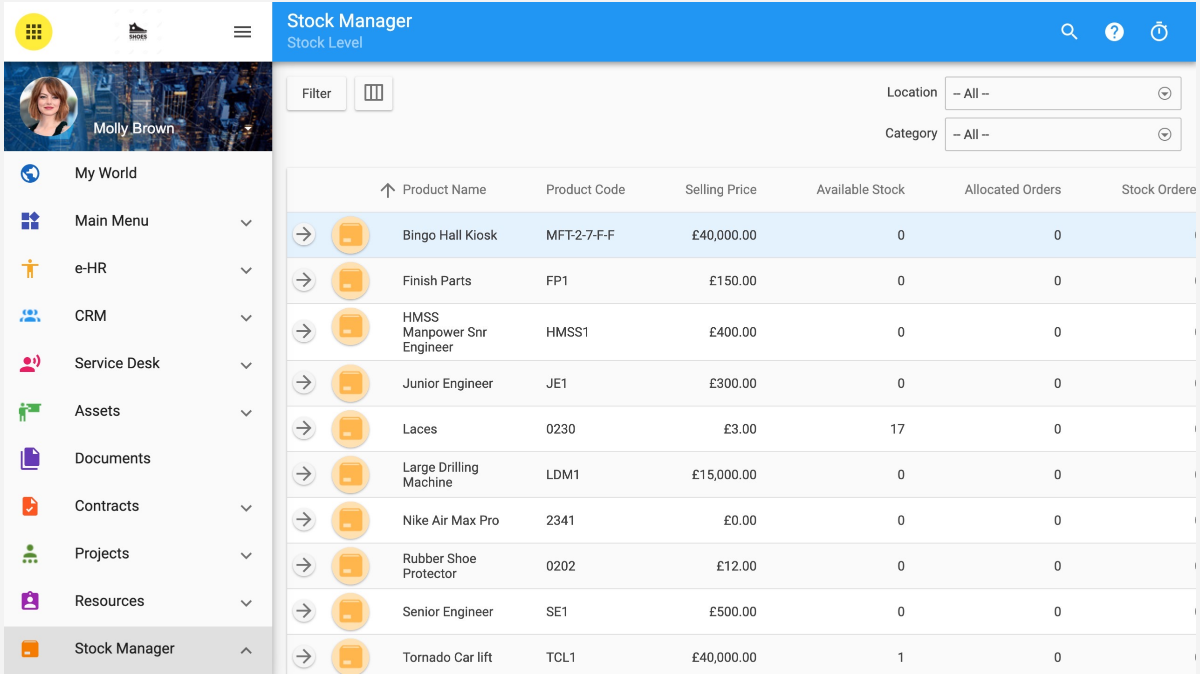
Stock Levels

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



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

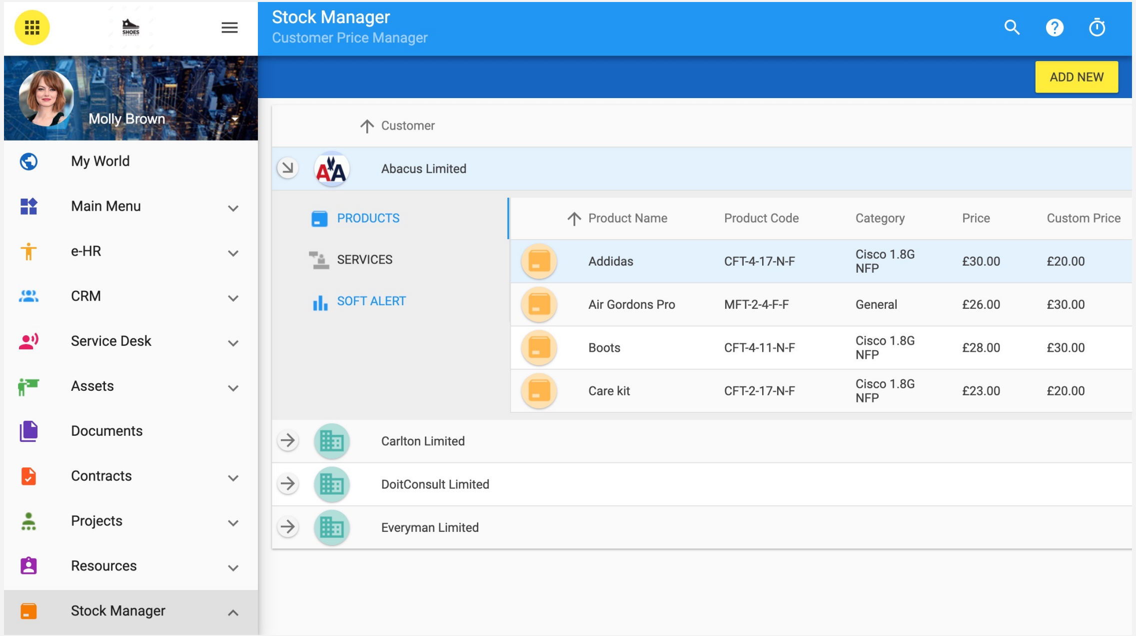
Here you can see a list of customer prices already within the system.

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.



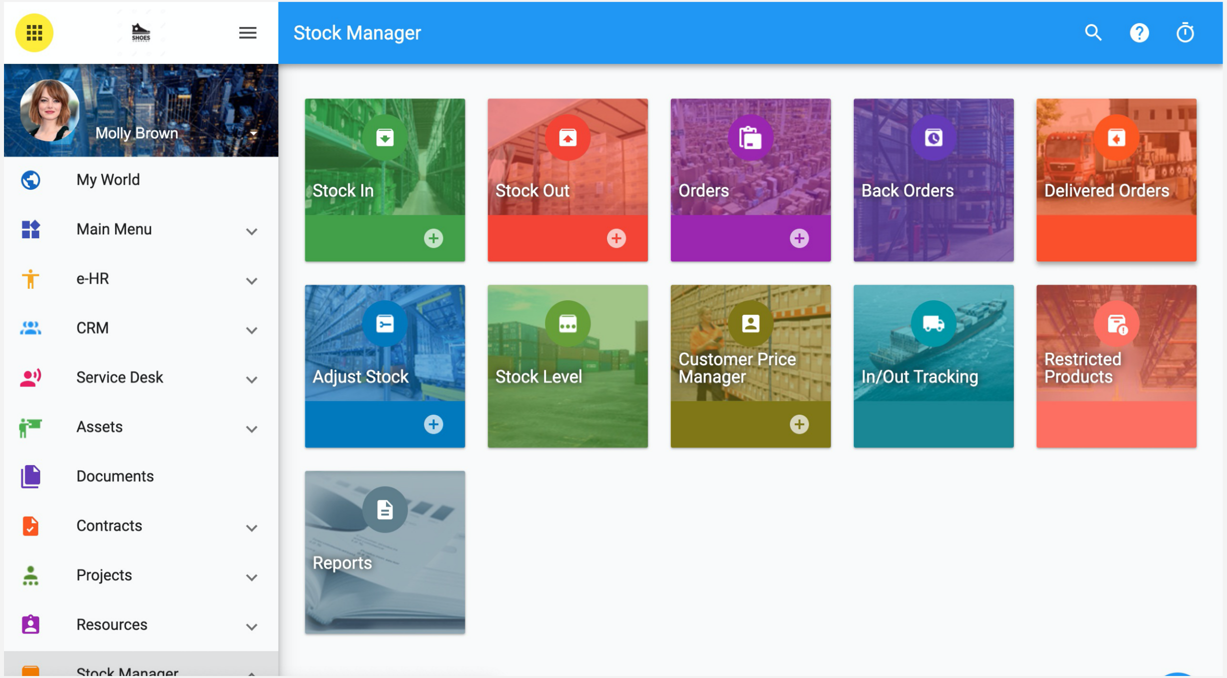
Stock Manager

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



DESKTOP / FIXED

Stock Manager

Restricted Products

From your stock Manager application, click Restricted Products

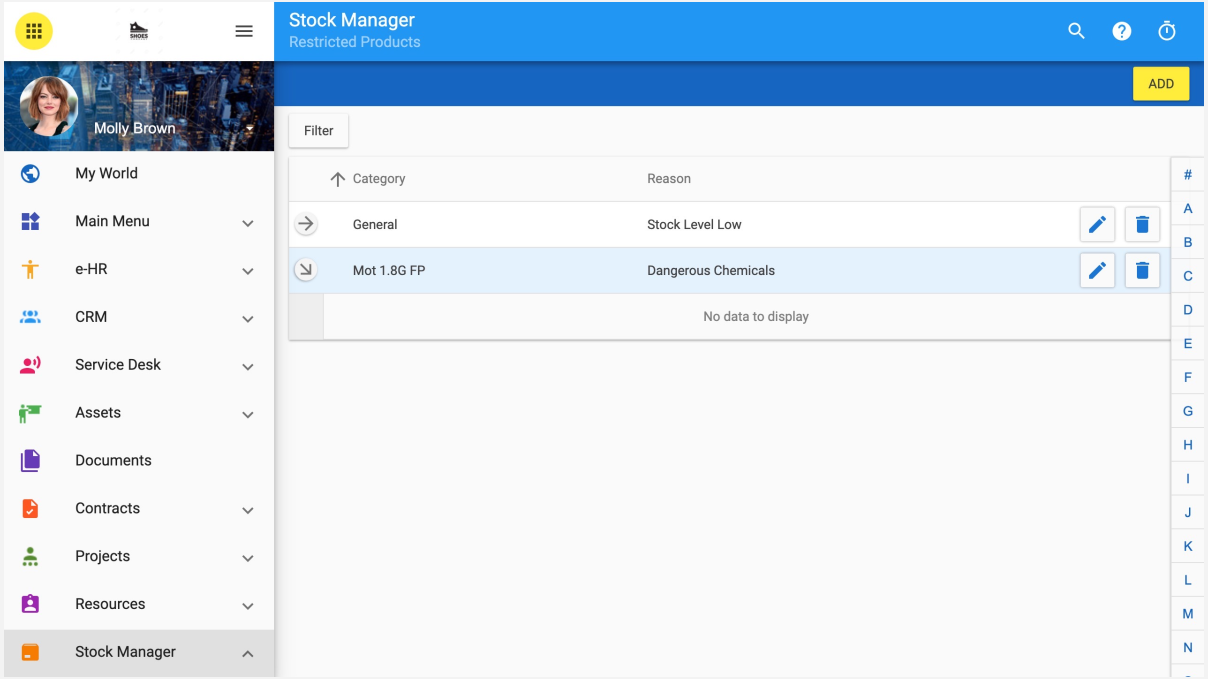
Here you can list Products/Services that are restricted due to dangerous items, chemicals or very low stock

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.



Thank You!

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