EZ Manager User Manual

1. Introduction

Welcome to the EZ Manager User Manual. This guide is designed to provide you with a comprehensive understanding of how to effectively utilize our software to streamline your inventory management processes. Whether you are a new user or looking to enhance your existing knowledge, this manual will serve as a valuable resource to help you navigate and optimize the functionalities of our software.

1.1 Purpose

The primary goal of our Inventory Management Software is to simplify and automate the complex task of inventory management. This software is built to cater to businesses of all sizes, helping you maintain accurate inventory records, reduce operational costs, and improve overall efficiency. By implementing our solution, you can expect to achieve better control over your inventory, ensuring that you always have the right products in the right quantities, at the right time.

1.2 Key Features

EZ Manager comes equipped with a range of powerful features designed to meet the diverse needs of modern businesses. Key features include:

- Real-time Inventory Tracking: Monitor inventory levels in real-time, ensuring you are always aware of stock quantities and locations.
- Multi-Location Management: Manage inventory across multiple warehouses or retail locations seamlessly.
- Barcode Integration: Utilize barcode for quick and accurate inventory updates.
- User-Friendly Interface: Enjoy a straightforward and intuitive interface that simplifies the inventory management process for all users.

1.3 Benefits

By adopting EZ Manager, your organization can experience a multitude of benefits, including:

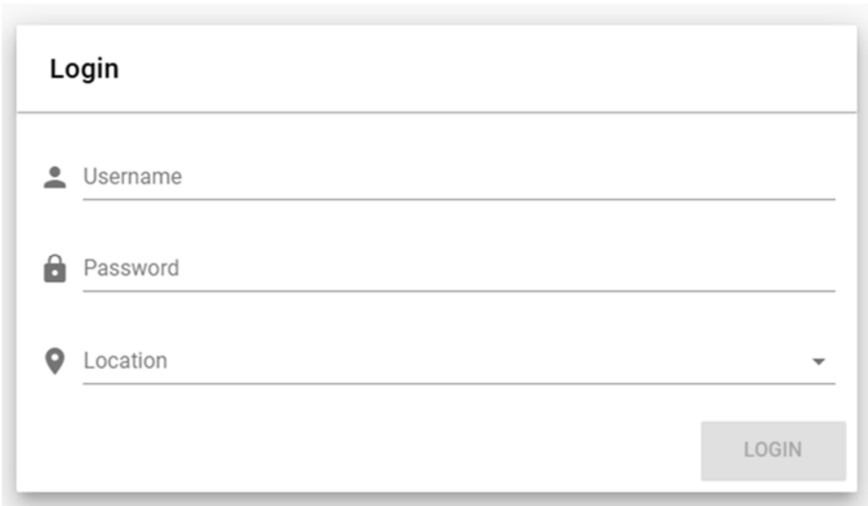
- Increased Efficiency: Automate routine tasks and reduce manual data entry, freeing up valuable time for your team to focus on strategic activities.

- Enhanced Accuracy: Minimize errors associated with manual inventory tracking, ensuring data accuracy and reliability.
- Cost Savings: Optimize stock levels to reduce holding costs and prevent losses due to overstocking or stockouts.
- Improved Customer Satisfaction: Ensure product availability and timely order fulfillment, enhancing customer satisfaction and loyalty.
- Scalability: As your business grows, our software can scale with you, accommodating increased inventory volumes and additional locations.

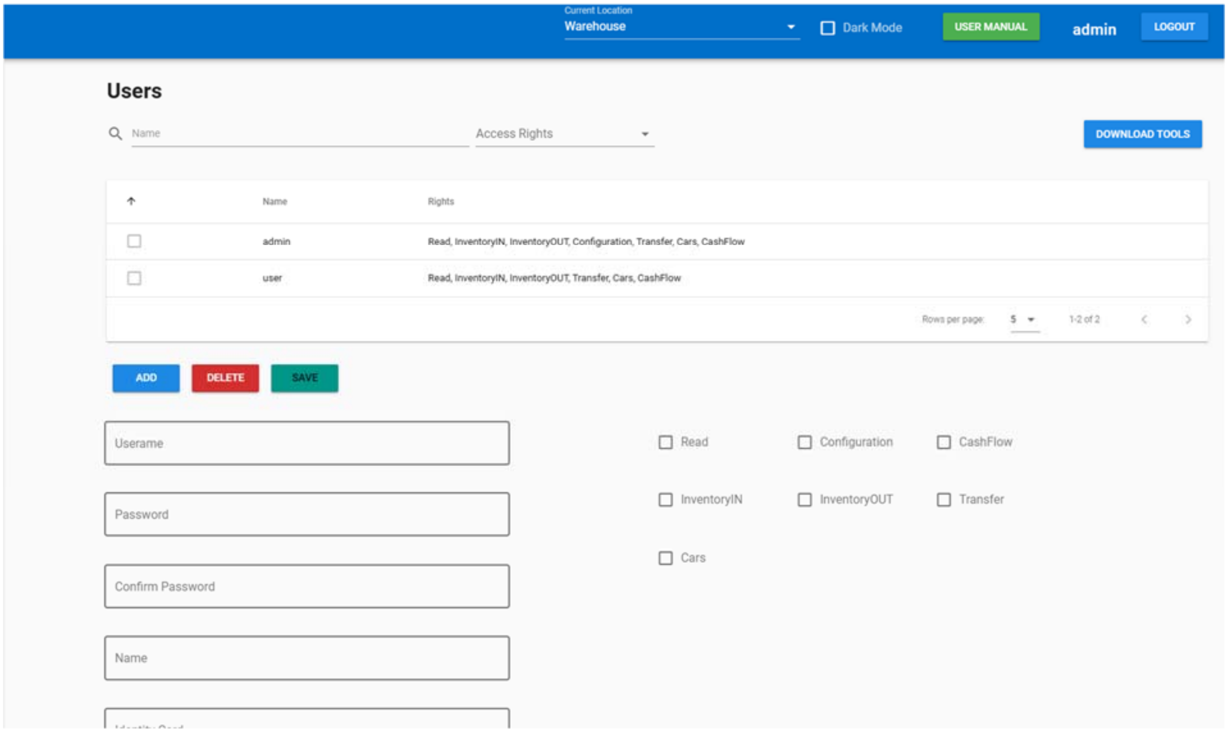
This manual will guide you through the setup, configuration, and day-to-day use of our Inventory Management Software. Each section is designed to be clear and concise, providing step-by-step instructions and helpful tips to maximize your software experience.

2. How to connect

EZ Manager is a web-based application. In order to connect, the user will open an internet browser (Google Chrome is most optimized for EZ Manager) and go to http://EZ_Manager_server_ip:8000/app/login.

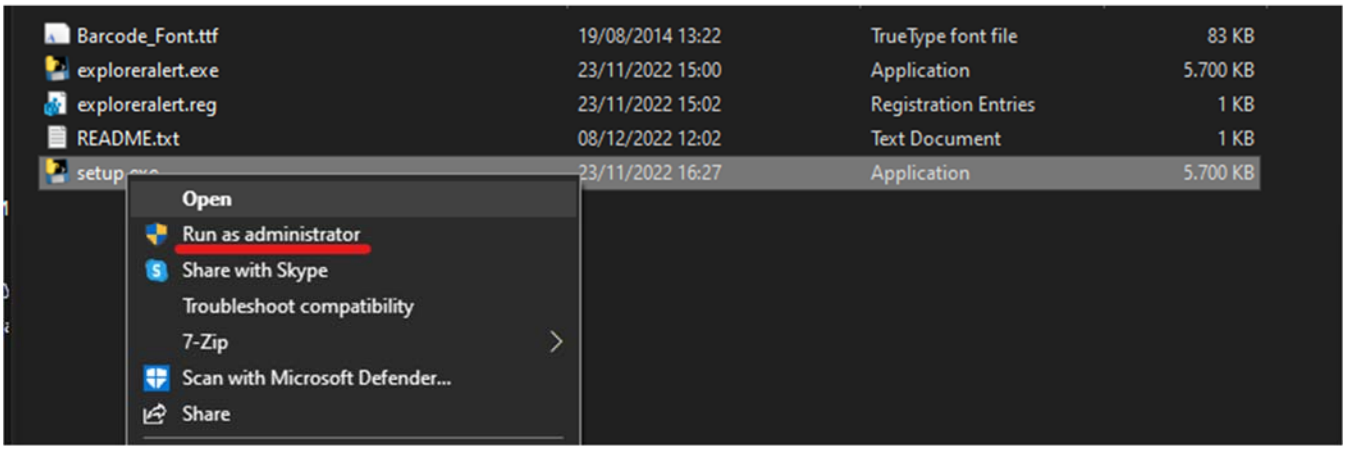


Here, they will be greeted by a login menu where they must insert their credentials and location that they want to work on. Location can later be changed without logging out. Default credentials are **admin/admin**. If unsure of your credential, please contact your support or system administrator in order to be provided with login credentials.



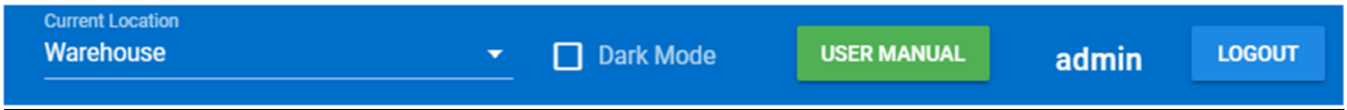
After logging in, the user will be taken on the **Users** page. Here, a user with **Configuration** rights can create, delete or update users for the EZ Manager application.

On the **Users** page, one can also download **EZ Manager Tools**. This is a directory containing a **setup.exe** script. Please run this script with **Run as Administrator** in order to install the extra tools necessary to run EZ Manager.



3. Workflows

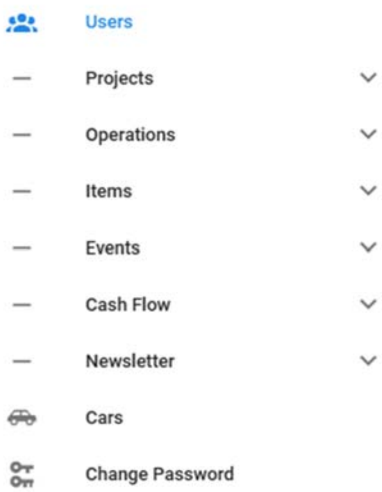
3.1 Layout



After logging in, the user will be redirected inside the EZ Manager application. In the top right corner, the user may change the **Current Location**, may change from **Light Mode** to **Dark Mode**, may download the **USER MANUAL** and **LOGOUT** once they are done.

The session automatically expires after one hour of inactivity.

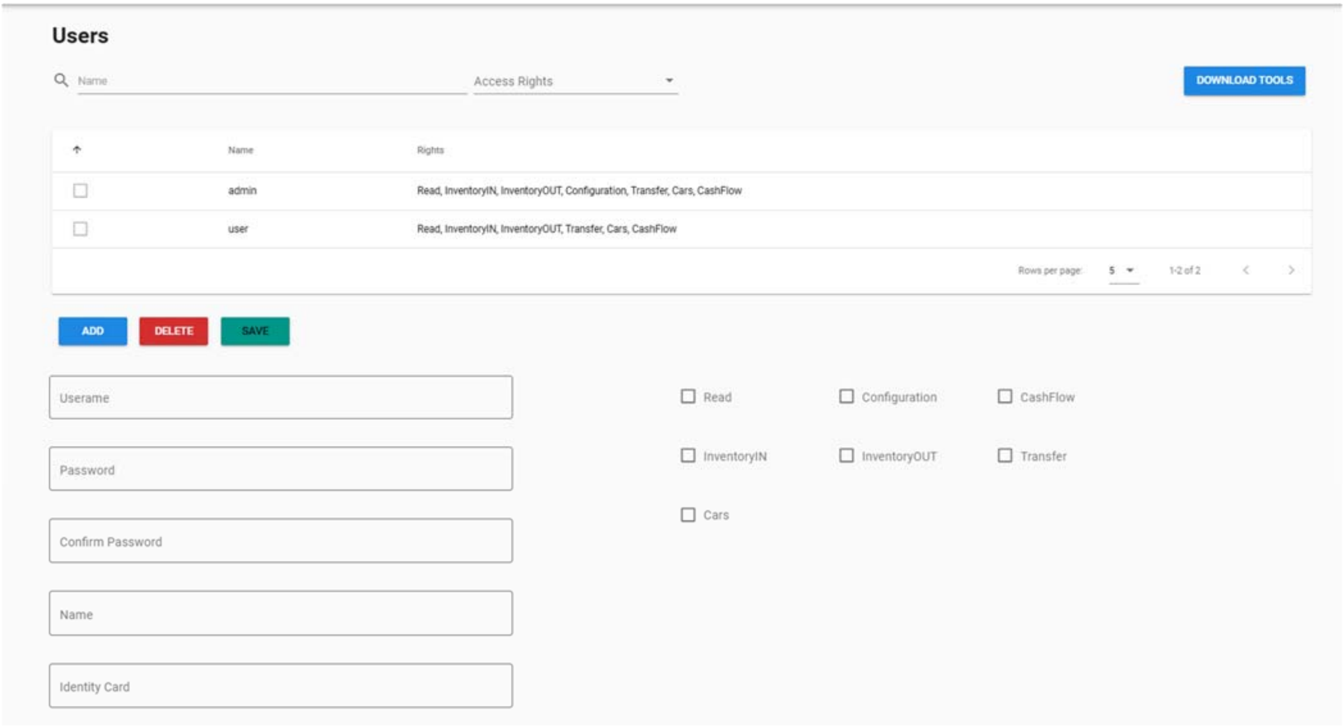
3.2 Drawer Menu



On the left side of the page, the user can find the navigation menu. The pages have been grouped in order to maximize efficiency.

The groups are: Projects, Operations, Items, Events, Cash Flow and Newsletter. Besides these groups, there are 3 more individual pages: Users, Cars and Change Password.

3.3 Users

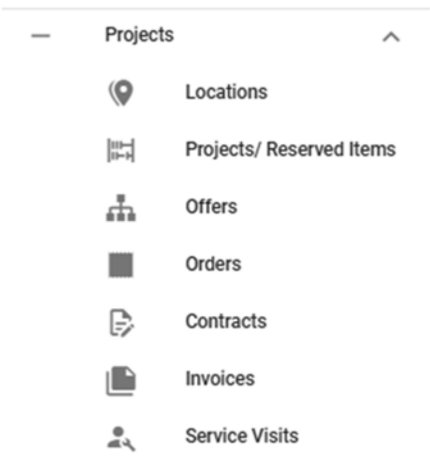


On the **Users** page, an admin user (with **Configuration** rights) may create, delete or update Users for the EZ Manager application.

A user must have a Username and a Password. All types of rights are optional. Name and Identity Card are also optional.

Using the two fields at the top of the table, **Name** and **Access Rights**, the user may filter through all the users in the table.

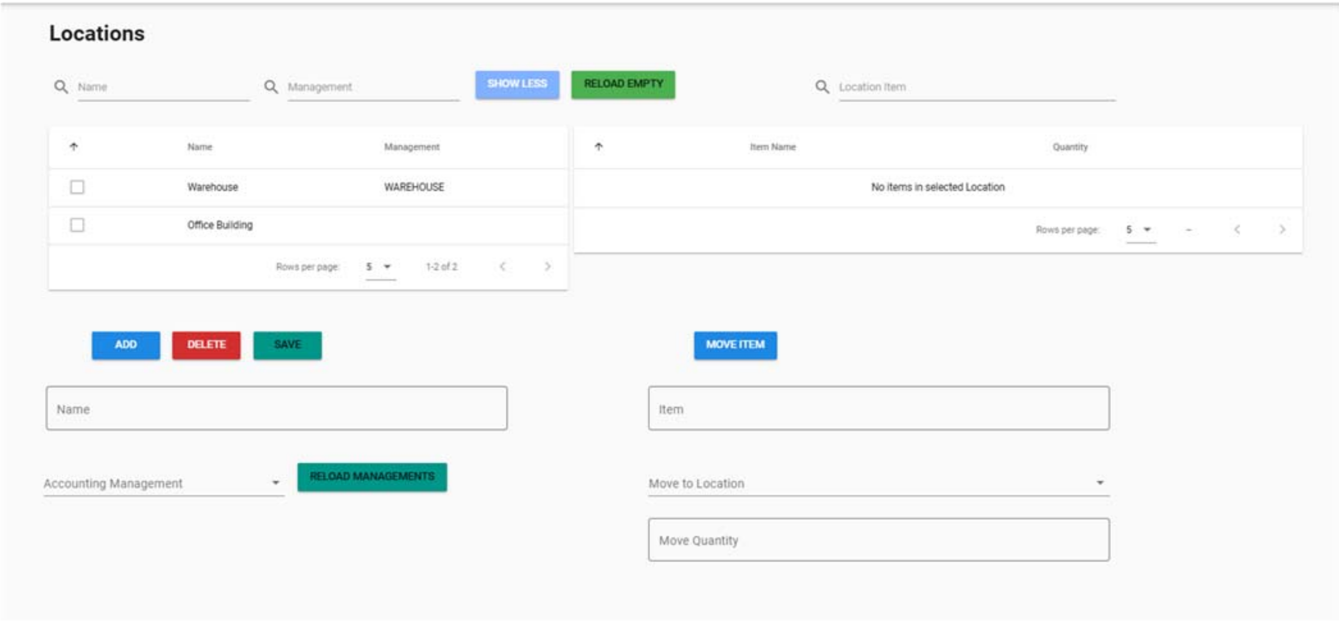
3.4 Projects



In the **Projects** page group, the user may find the following pages: Locations, Projects/Reserved Items, Offers, Orders, Contracts, Invoices and Service Visits.

In this group, the user may manage past, ongoing or future projects.

3.4.1 Locations



On the **Locations** page, a user with **Configuration** rights may create, delete or update Locations.

A location must have a Name. Accounting Management is optional and it refers to a location in the accounting application integration. If a location has an Accounting Management, it refers to items currently in possession of the company. If it does not have an Accounting Management, it refers to a location of a client where the company is having an ongoing project.

The **RELOAD MANAGEMENTS** button takes new information from the Accounting Application Integrated with EZ Manager in order to see if there are any new Managements created

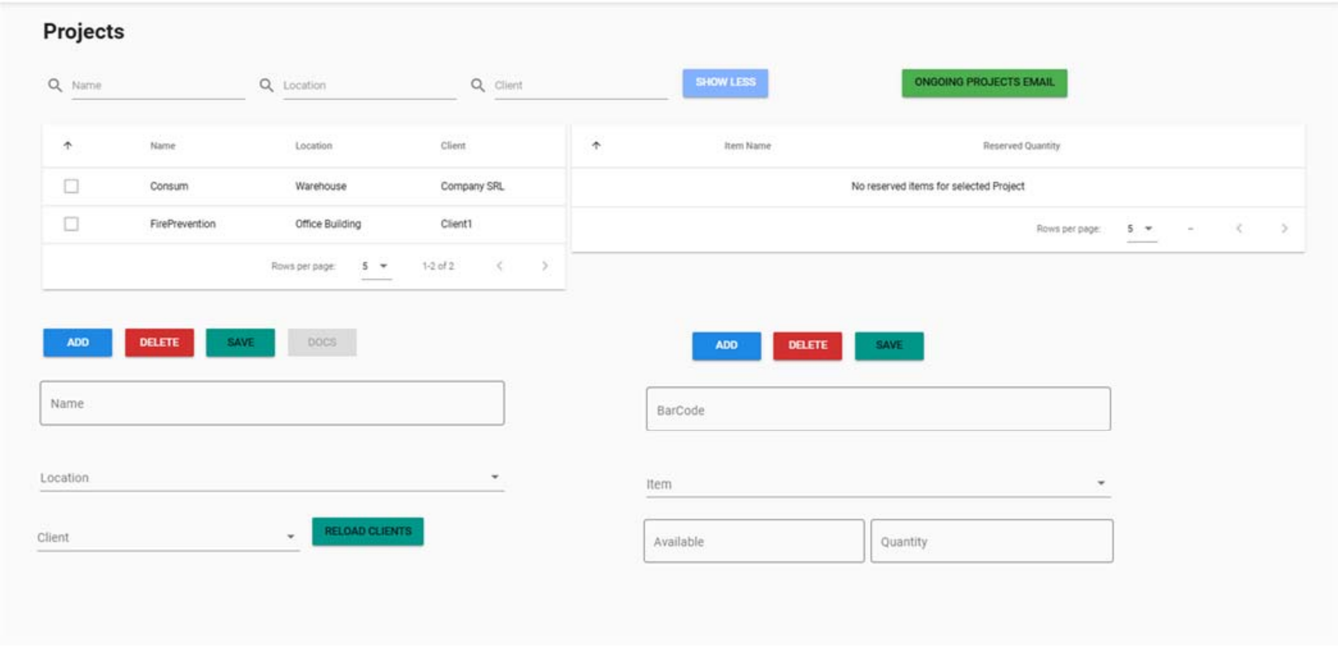
The **SHOW LESS** button at the top of the screen acts as a toggle between **SHOW ALL** and **SHOW LESS**. If a location does not have any item in it, it will be automatically hidden. If the user wants to see all locations, regardless of items, they will hit the **SHOW ALL** button. The **RELOAD EMPTY** button refreshes the locations in order to check if some of them may have been left without items in the meantime.

On the right side of the screen, the user can see a second table. This table is filled with items inside the selected location (from the left table). The user can filter through the left table using the **Name** and **Management** fields, and filter through the right table using the **Location Item** field.

Below the second table, a user can use the **MOVE ITEM** button in order to move items between two locations that **both** have accounting managements.

Note: if we want to transfer items from a location with accounting management to one without (transferring it to a client) we will use a **Transfer Operation**, described later in the 3.5 point.

3.4.2 Projects/ Reserved Items



On the **Projects** page, a user with **Configuration** rights can create, delete or update projects.

A project must have a Name, a Location and a Client.

If the user has not created the location first, they can just write the name in the Location field and a new location will be automatically created.

The **RELOAD CLIENT** button reloads the client list from the Accounting Application integrated with EZ Manager.

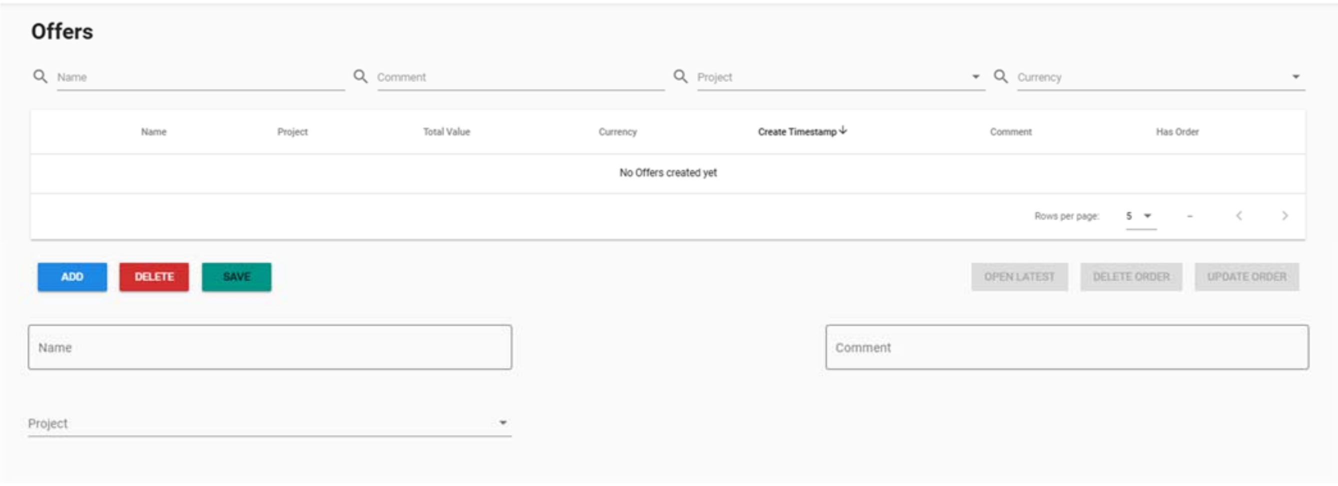
The **SHOW LESS** button at the top of the screen acts as a toggle between **SHOW ALL** and **SHOW LESS**. If a project's location does not have any item in it, the project will be automatically hidden. If the user wants to see all projects, regardless of items, they will hit the **SHOW ALL** button.

The **ONGOING PROJECTS EMAIL** sends an email containing all ongoing projects, contracts, orders and unpaid invoices, along with service visits.

On the right side of the screen, the user can see a second table. This table is filled with items reserved for the selected project (from the left table). A use with **Configuration** rights can create, delete or update reserved items for any project. These items have to be present in a location that has an Accounting Management.

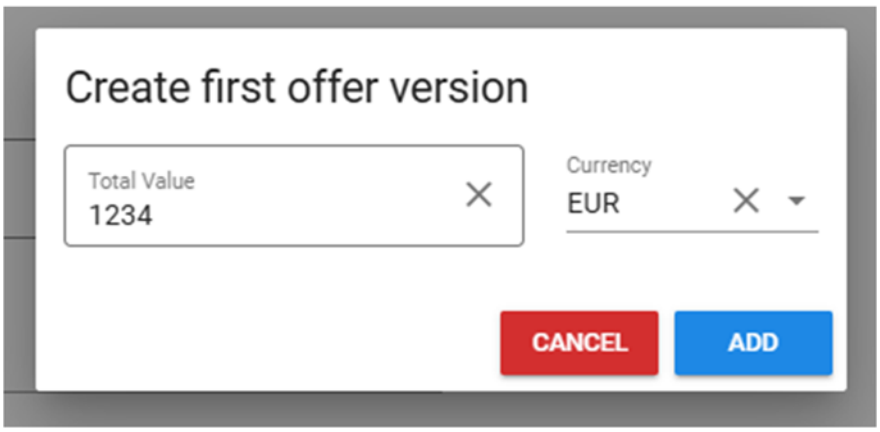
The user can filter through the left table using the **Name**, **Location** and **Client** fields.

3.4.3 Offers

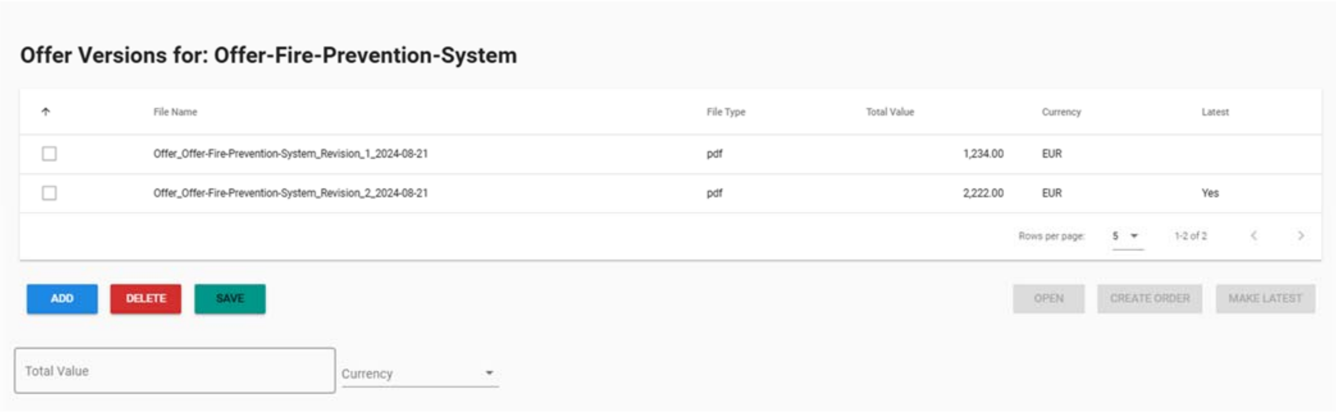


On the **Offers** page, a user can create, delete or update offers. An offer must have a Name and a Project (this links the offer to a client). The Comment is optional.

The user can filter through the offers using the Name, Comment, Project and Currency fields.

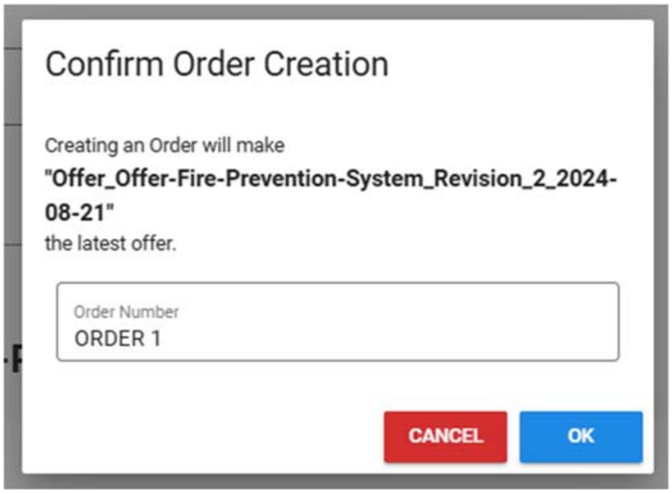


In order to streamline the creation of offers, after the user inserts a Name and Project and then clicks ADD, a popup will appear in order to help create the first Offer Version. After clicking ADD, the user will have to select a file for the offer version sent to the client.



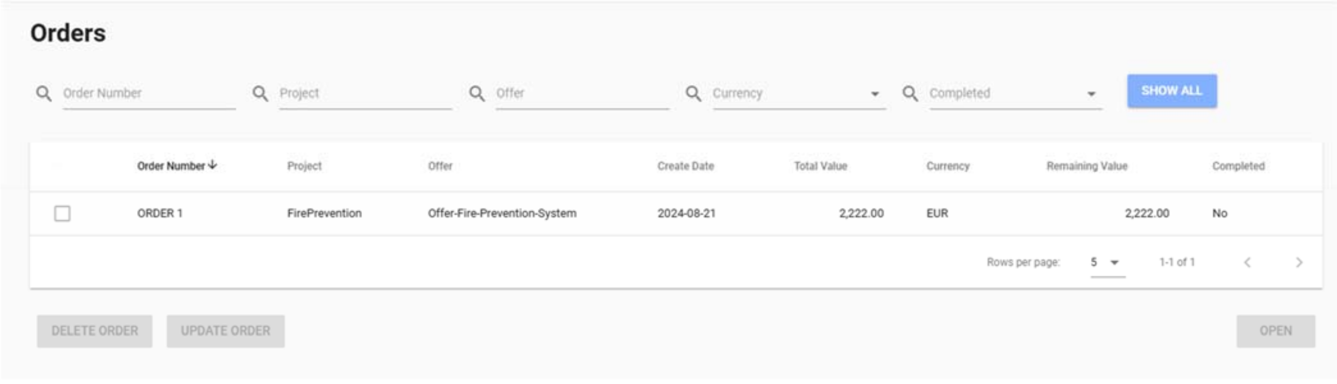
After creating an offer, in the lower part of the page the user will see a new table that refers to all the offer version of that offer. Here, they can create, delete or update existing offers. By using the **OPEN** button, EZ Manager will automatically open the offer file uploaded, that is saved on the EZ Manager Server. By using the **MAKE LATEST** button, the user can revert to one of the earlier offer versions and make them the latest relevant.

After going back and forth with the client and deciding on what offer best suits the client needs, the user can select it and create an order for it by clicking the **CREATE ORDER** button, in the lower right corner.



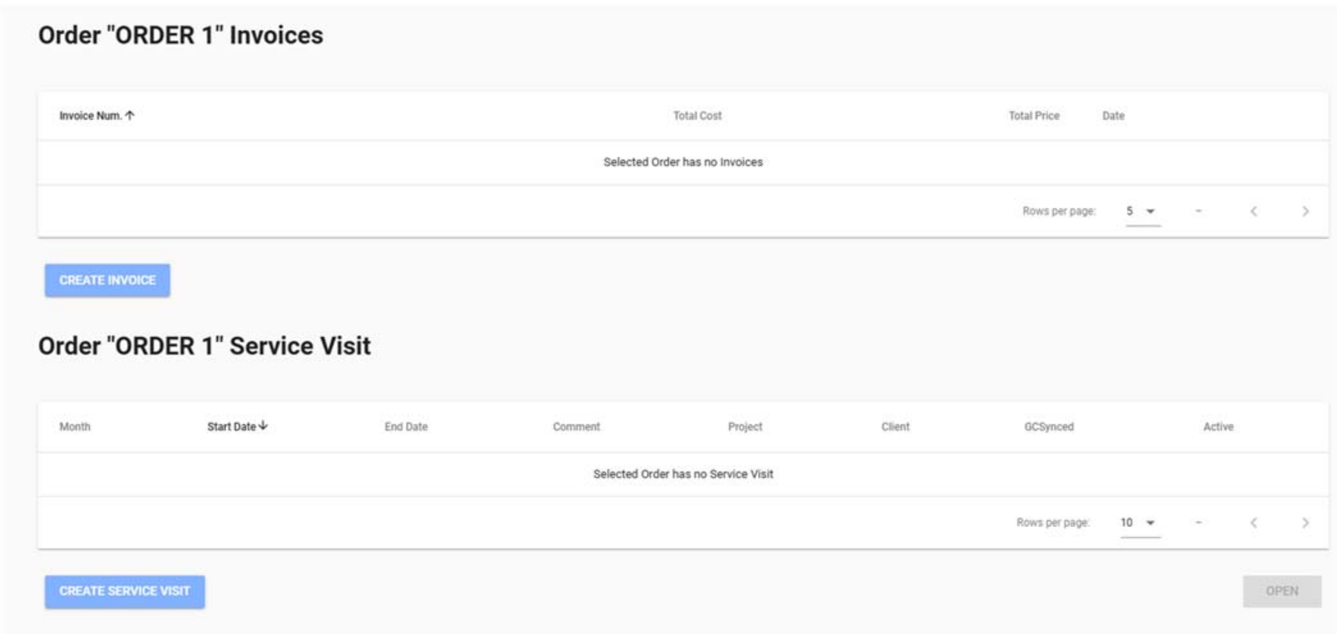
After clicking the **CREATE ORDER** button, a pop up will appear where the user can insert the Order Number. After clicking **OK**, the user will have to select a file to upload for the order.

3.4.4 Orders



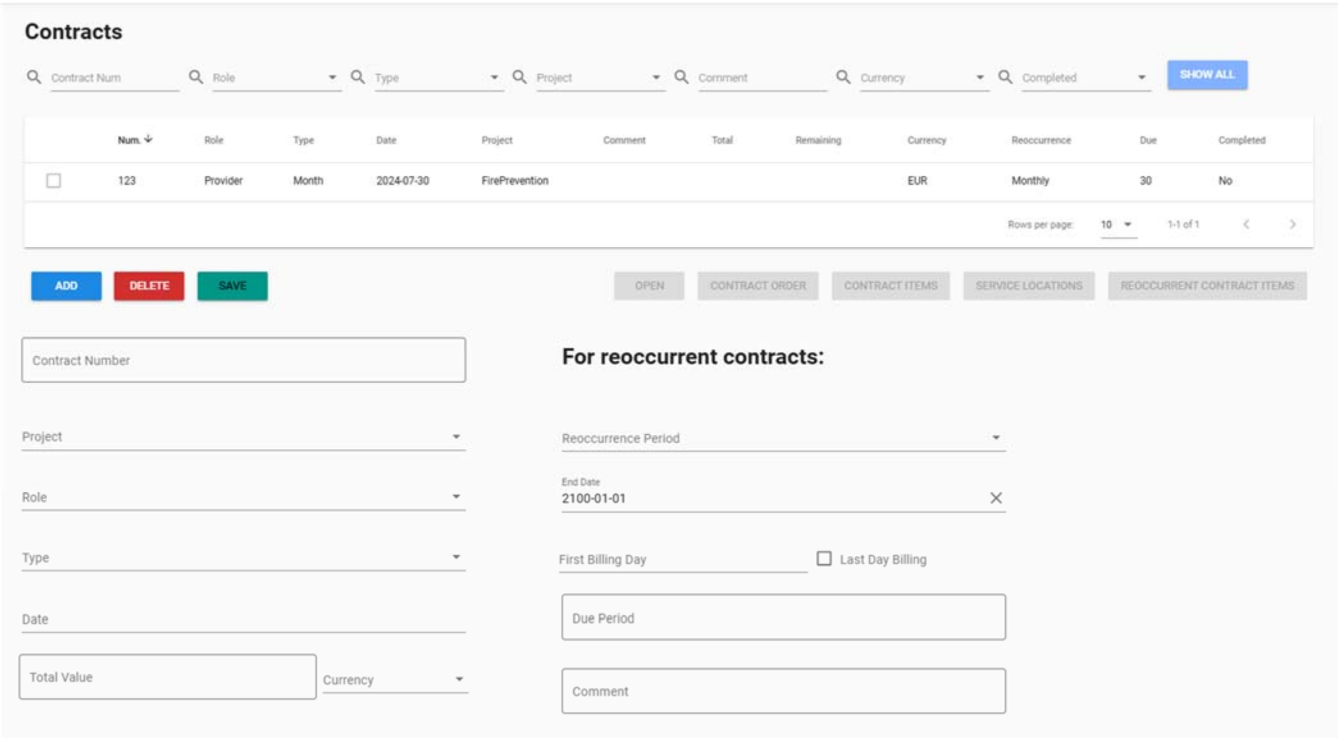
On the **Orders** page, the user can delete or update orders.

The **SHOW ALL** button at the top of the screen acts as a toggle between **SHOW ALL** and **SHOW LESS**. If an order is Completed (marked as completed once the Remaining Value is 0) it is automatically hidden.



After selecting an order, two more tables will appear at the bottom of the screen. Here, the user can see all Invoices and all Service Visits for the selected Order. They can also use the **CREATE INVOICE** or **CREATE SERVICE VISIT** buttons in order to be redirected to the specific page and create a new invoice or a new service visit.

3.4.5 Contracts



On the **Contracts** page, a user with **Configuration** rights can create, delete or update contracts. There are two types of contracts: one-time contracts and reoccurrent contracts that will generate a monthly invoice.

A one-time contract must have Contract Number, Project, Role, Type, Date, Total Value and Currency. The fields on the right side of the screen are to be left empty.

A reoccurrent contract must have Contract Number, Project, Role, Type, Date, Currency, Reoccurrence Period, End Date, First Billing Day and Due Period.

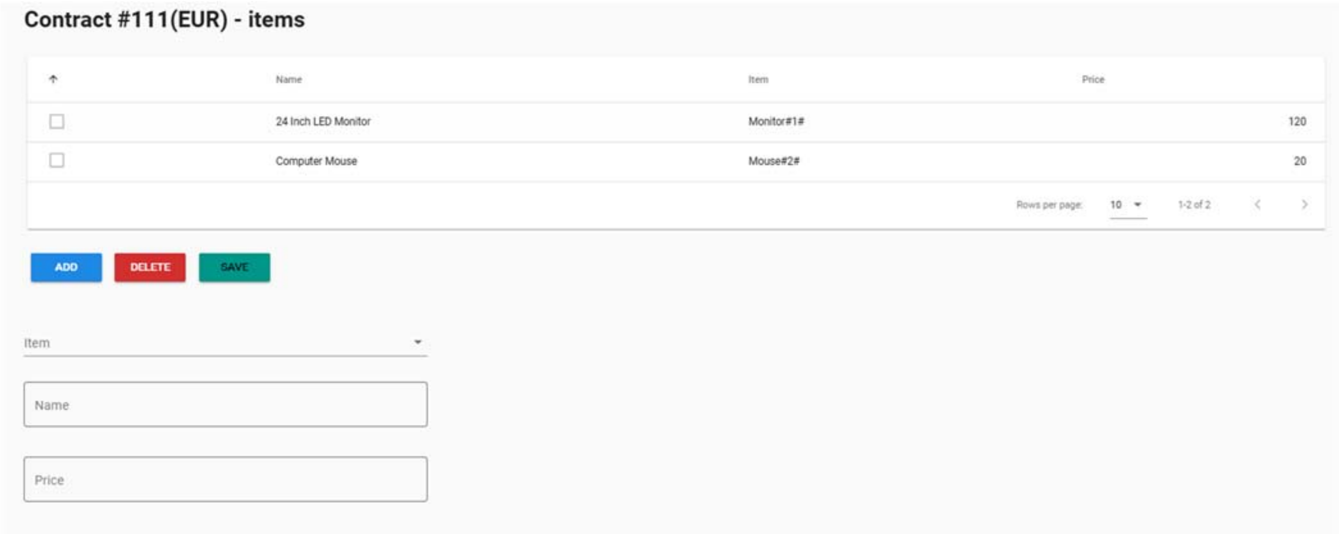
Comment is optional for both types of contracts.

Depending on which type of contract the user has created, some of the 4 buttons on the right side of the page will become available (**CONTRACT ORDER, CONTRACT ITEMS, SERVICE LOCATIONS, REOCCURRENT CONTRACT ITEMS**).

The user can filter through contracts using the Contract Num, Role, Type, Project, Comment, Currency or Completed fields at the top of the screen.

The **SHOW ALL** button at the top of the screen acts as a toggle between **SHOW ALL** and **SHOW LESS**. If a contract is Completed (marked as completed once the Remaining Value is 0) it is automatically hidden.

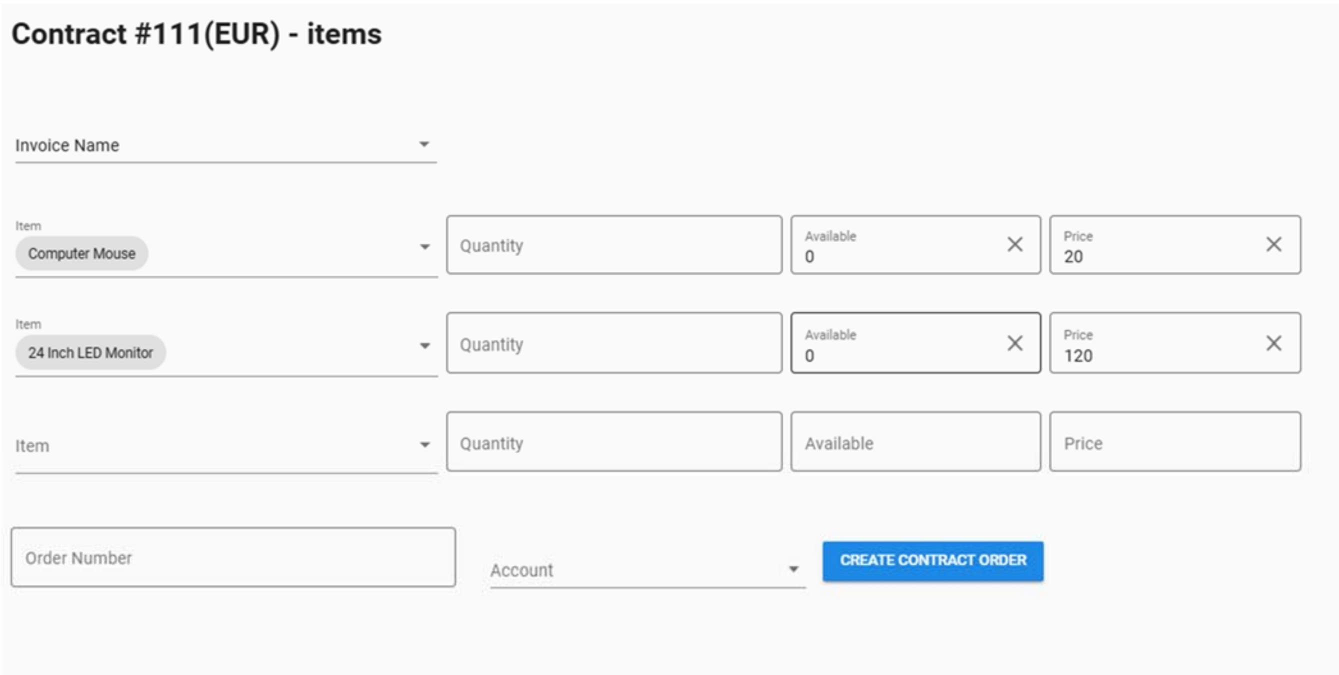
3.4.5.1 Contract Items



On the **Contract Items** page, the user can create, delete or update contract items. These items are agreed on prices from a framework contract. Using these items, the user may later create a **Contract Order** easily.

This page is available only for one-time framework contracts.

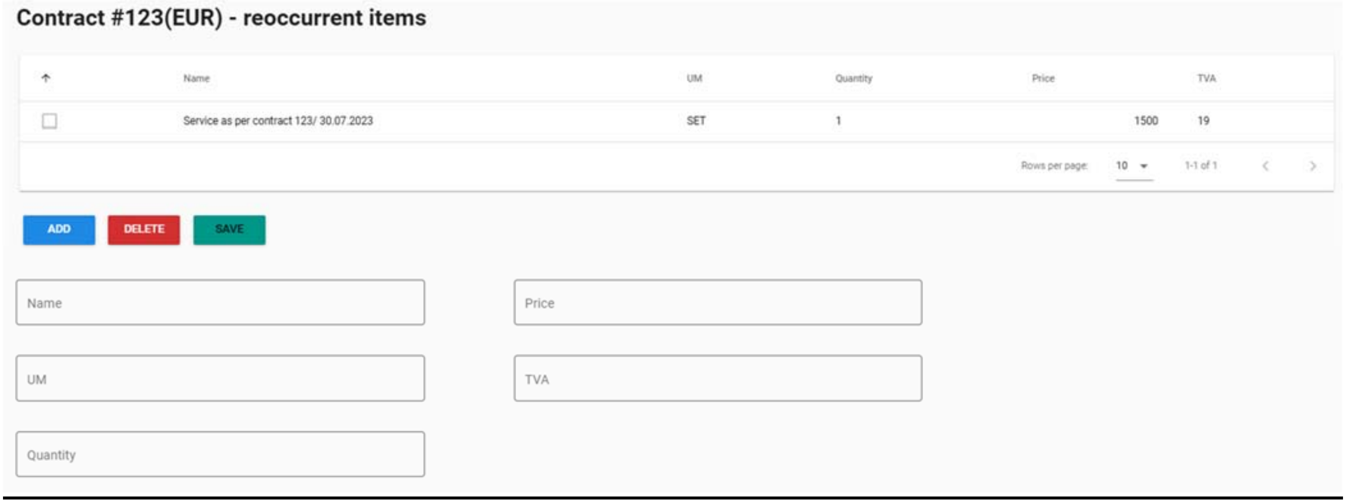
3.4.5.2 Contract Order



On the **Contract Order** page, the user can create contract orders using the items previously defined under **Contract Items**. This automatically creates an order and an invoice that will then be imported into the Accounting Application.

This page is available only for one-time framework contracts.

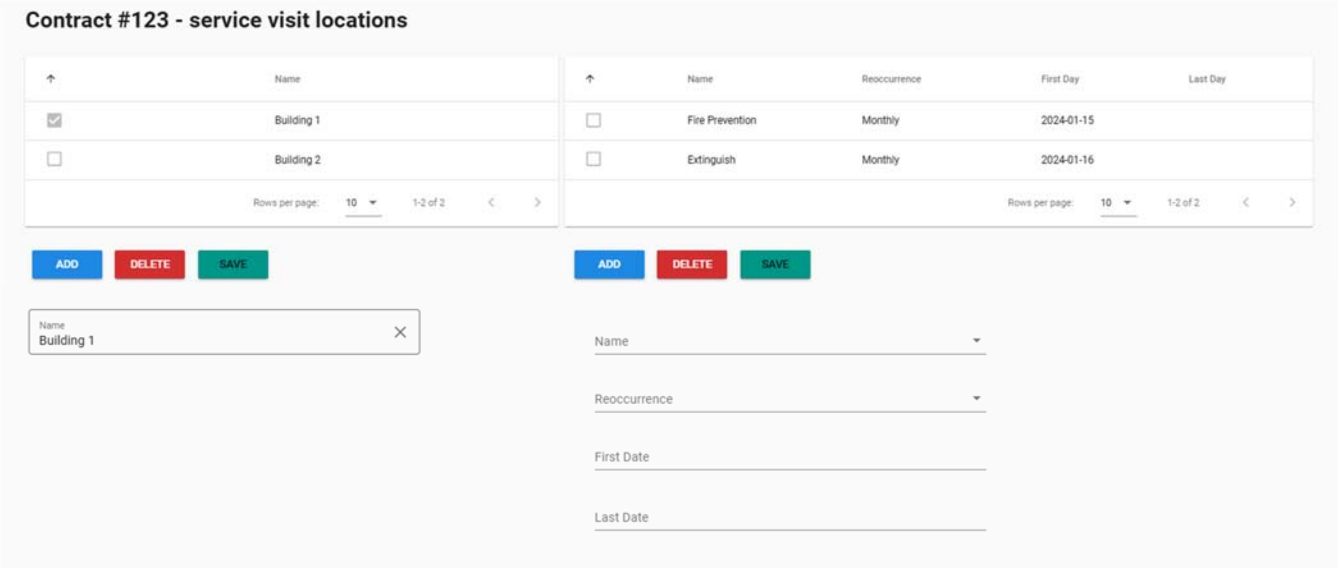
3.4.5.3 Reoccurrent Contract Items



On the **Reoccurrent Contract Items** page, the user can define every line that must appear on the reoccurring invoice for the contract.

This page is available only for reoccurrent contracts.

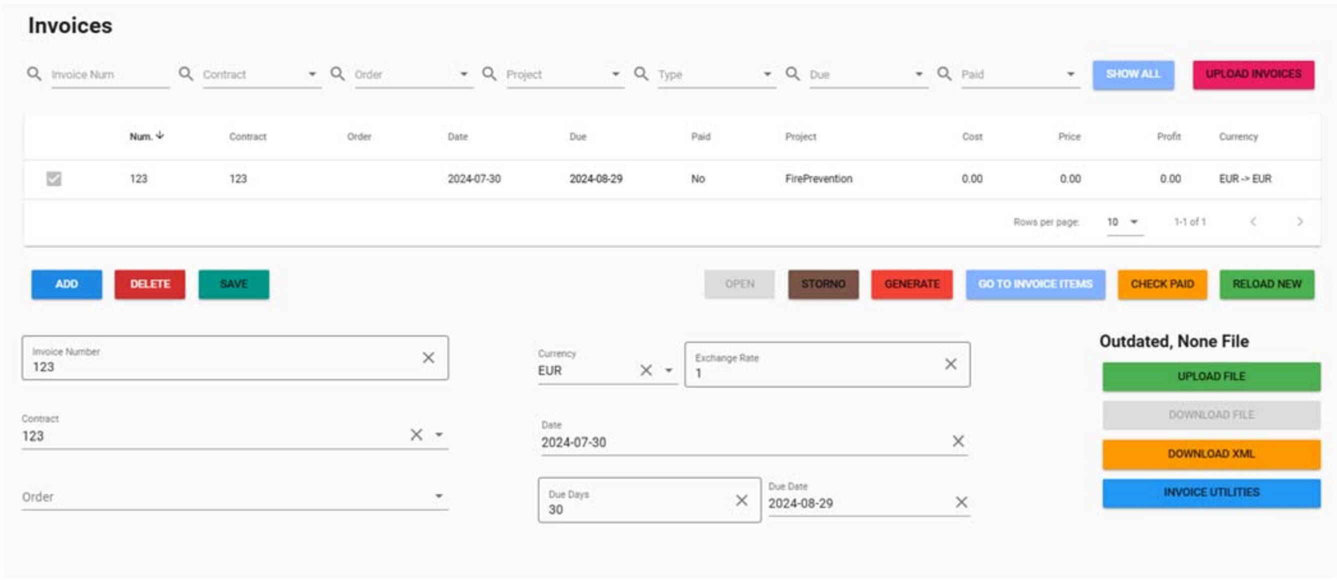
3.4.5.4 Service Locations



On the **Service Locations** page, the user can create service locations for a contract. In each service location there can be one or more service systems. Using this information, EZ Manager will automatically generate Service Visits for the contract, notifying the service team of where they need to go and intervene. Service Visits are also synced with Google Calendar.

This page is available only for reoccurrent contracts.

3.4.6 Invoices



On the **Invoices** page, the user may create, delete or update invoice.

An invoice must have an Invoice Number, Contract or Order(can't be both), Currency, Date and Due Date. The user can input their own Exchange rate or EZ Manager will automatically fill it with the international exchange rate between the selected currencies. The user can manually input the Due Date or they can use the Due Days field. By writing the number of days, EZ Manager will automatically select the correct Due Date.

The **SHOW ALL** button at the top of the screen acts as a toggle between **SHOW ALL** and **SHOW NOT PAID**. If an invoice is Paid (marked as paid either when the bank transfer is detected in **Cash Flow** or information is taken from the Accounting Application) it is automatically hidden.

The **UPLOAD INVOICES** button lets the user upload files for multiple invoices at a time. These files must have a specific name in order to be correctly uploaded.

The **STORNO** button automatically creates a storno invoice for the selected invoice. On this invoice, the user can add additional items on the **Invoice Items** page.

The **GENERATE** button will generate a PDF file for the invoice and save it in on the EZ Manager Server.

The **GO TO INVOICE ITEMS** takes the user to the **Invoice Items** page.

The **CHECK PAID** button checks Cash Flow and the Accounting Application in order to see if there are any new paid invoices

The **RELOAD NEW** button reloads automatically generated invoices for reoccurrent contracts.

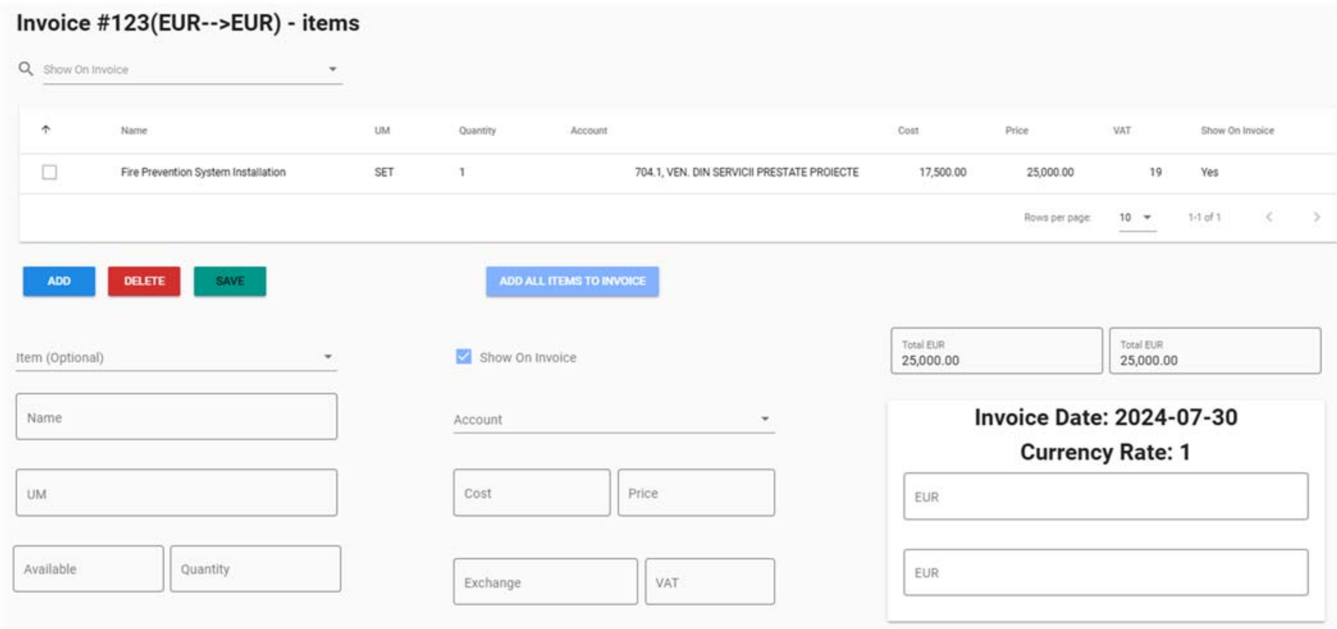
The **UPLOAD FILE** button lets the user upload a file for the selected invoice.

The **DOWNLOAD FILE** button downloads the file of the selected invoice. This button is disabled if the selected invoice does not have a file.

The **DOWNLOAD XML** button downloads an xml file that can be imported in the Accounting Application integrated with EZ Manager.

The **INVOICE UTILITIES** button takes the user to the **Invoice Utilities** page.

3.4.6.1 Invoice Items

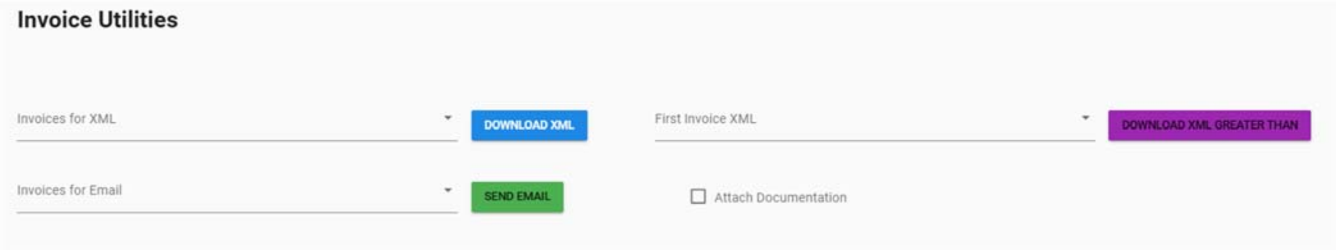


On the **Invoice Items** page, the user can add items to the invoice. If an item is being sold then the first field, Item is required. The Name is the text that will appear on the invoice. The invoice item must have a Name, UM, Account, Cost, Price and VAT.

Using the **ADD ALL ITEMS TO INVOICE** button, the user can automatically add all items shipped to the client to this invoice, streamlining the invoicing process.

On the right side of the page there is a currency converter between the contract currency and the invoice currency.

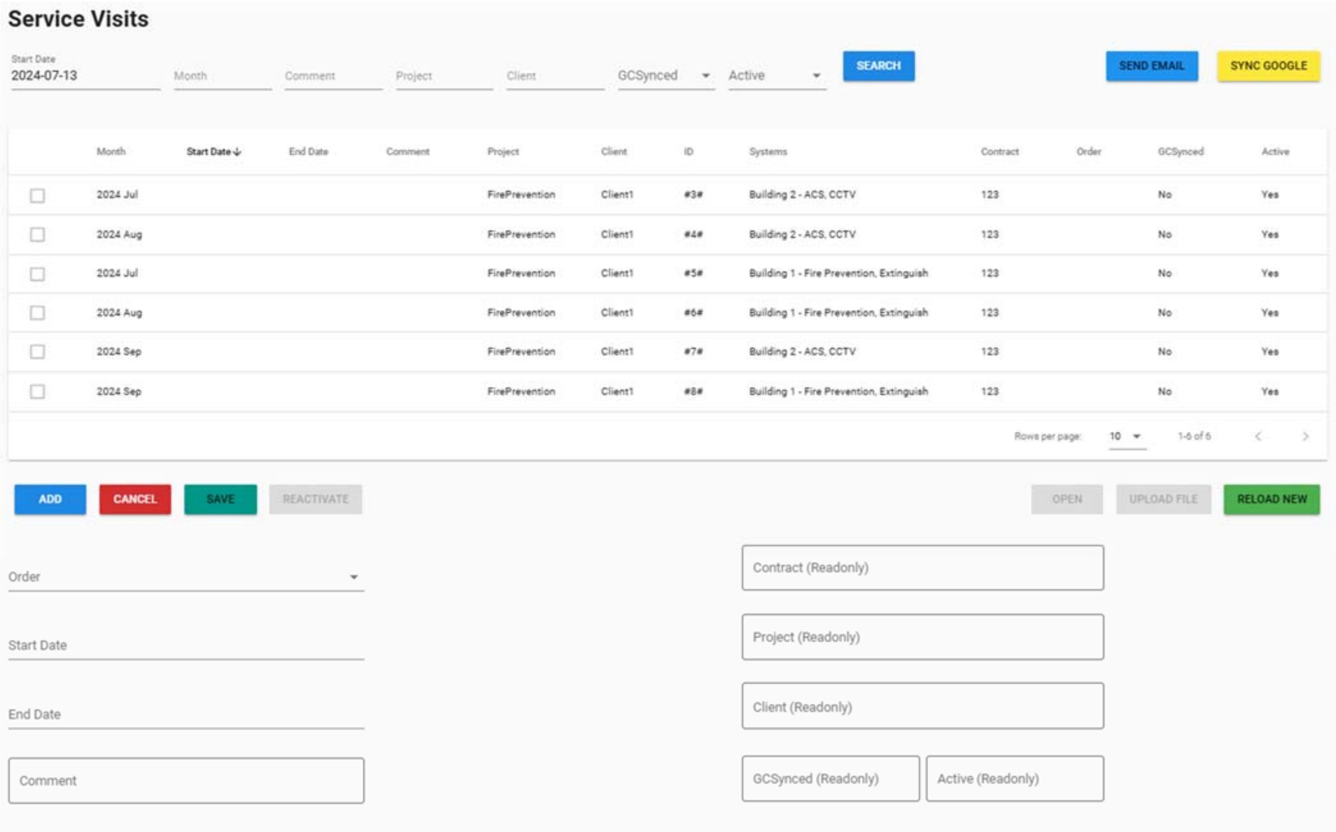
3.4.6.2 Invoice Utilities



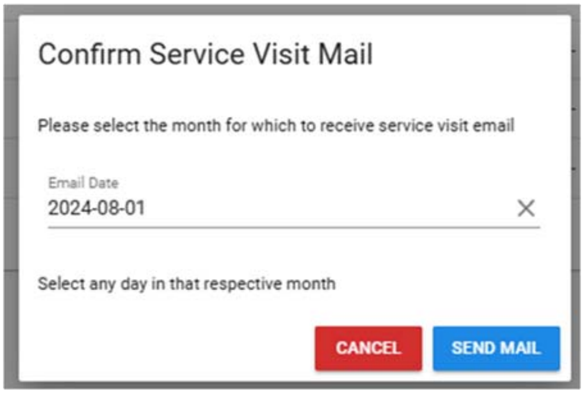
On the **Invoice Utilities** page, the user can download xml files for multiple invoices at a time, simplifying the import process into the Accounting Application.

Using the **SEND EMAIL** button, the user can send email after a template to the clients. If **Attach Documentation** is checked, the email will contain both the invoice and the Documentation for that project.

3.4.7 Service Visits



On the **Service Visits** page, the user can manage service visits. Service Visits are automatically created for contract, according to service locations. A user can only create service visits for Orders. If a user deletes a service visit for a contract, it will not be deleted, but it will be marked as deactivated. It can be reactivated using the **REACTIVATE** button.



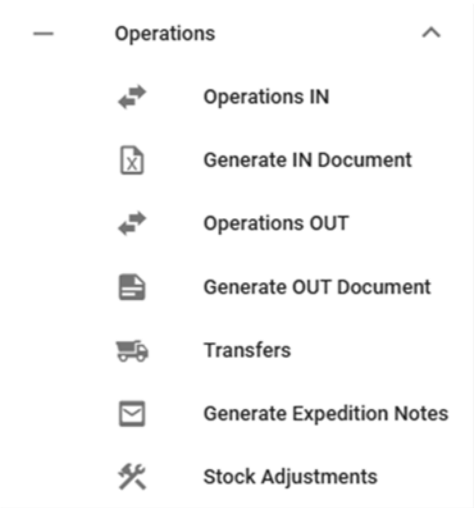
The **SEND EMAIL** button sends an email containing all service visits for a selected month.

The **SYNC GOOGLE** button syncs the service visit dates with google calendar. This is also done automatically every hour.

The **RELOAD NEW** button reloads newly created service visits for service systems. This is also done automatically every day.

The user can filter through service visits using the Start Date, Month, Comment, Project, Client, GCSynced and Active fields at the top. If Start Date is modified, the user must press the **SEARCH** button.

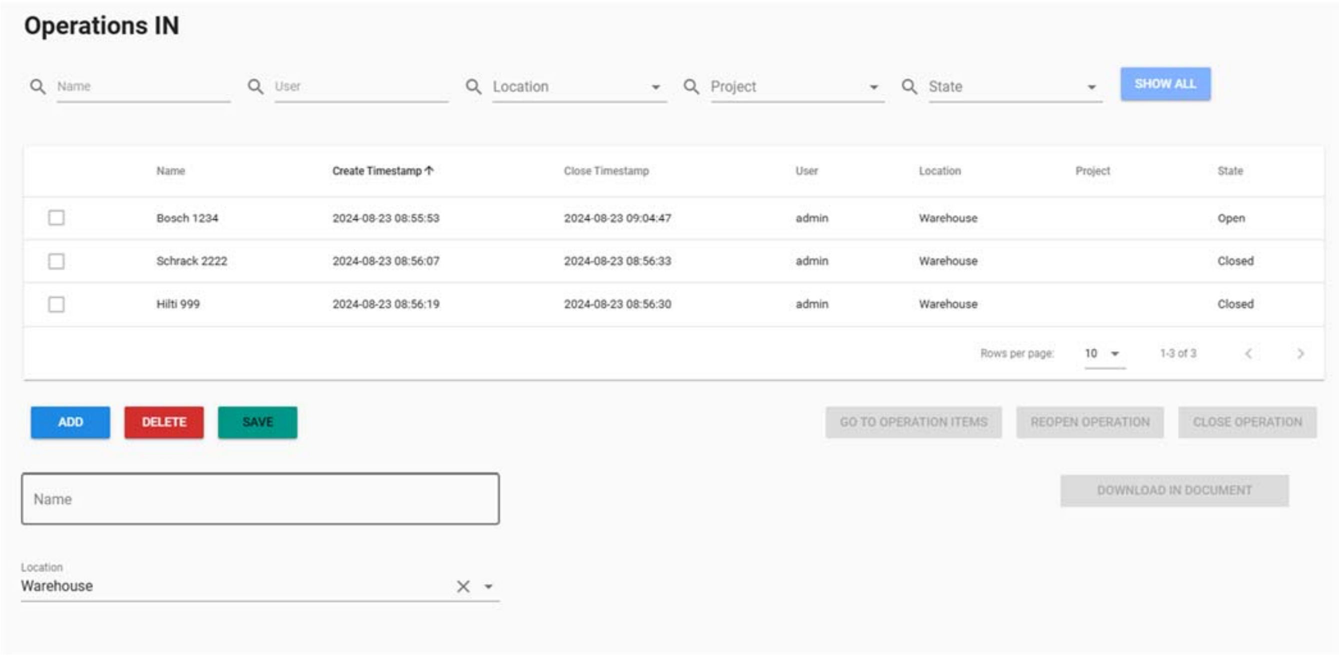
3.5 Operations



In the **Operations** page group, the user may find the following pages: Operations IN, Generate IN Document, Operations OUT, Generate OUT Document, Transfers, Generate Expedition Notes and Stock Adjustments.

In this group, the user may manage past, ongoing or future operations.

3.5.1 Operations IN



On the **Operations IN** page, the user with **InventoryIN** rights can create, delete and update IN operations.

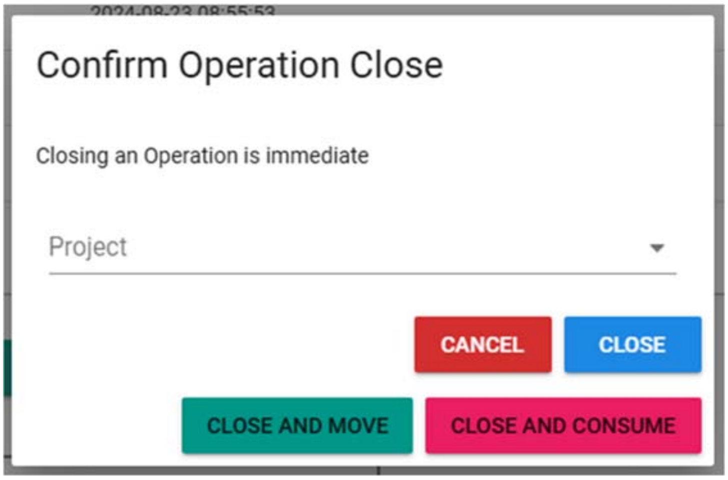
An IN Operation must have a name. This name is the suppliers name followed by the Invoice number for easy future reference. The location is selected in the layout at the top of the screen and it can't be changed on this page.

The **SHOW ALL** button at the top of the screen acts as a toggle between **SHOW ALL** and **SHOW LESS**. By default, the page will only load the last 3 closed operations along with all Open operations. If the user wants to see all operations they must click the **SHOW ALL** button.

The user can filter through the table using the Name, User, Location, Project and State fields at the top of the page.

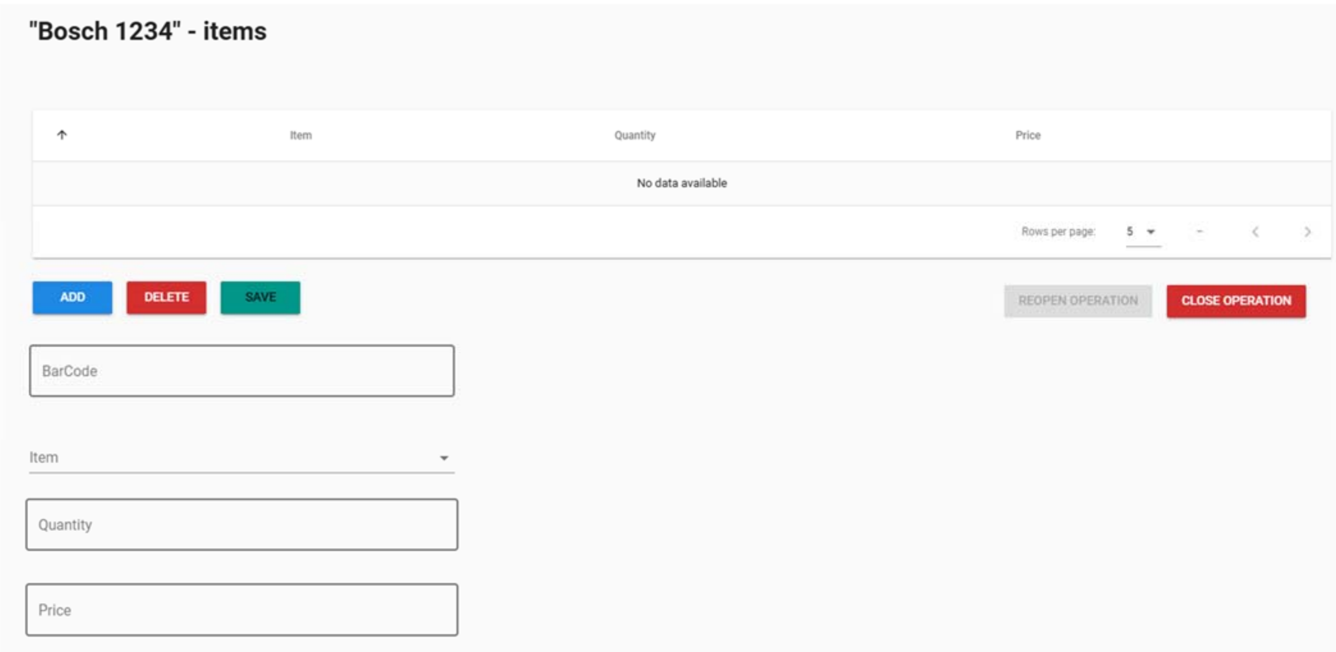
The **REOPEN OPERATION** button, reopens the selected operation. Operations can only be reopened in the first 7 days after being inserted, if no item from that IN operation has been already used/ sold.

The **CLOSE OPERATION** button, closes the operation, finalizing the transaction. Before closing an operation, no item from that operation will appear inside the inventory.

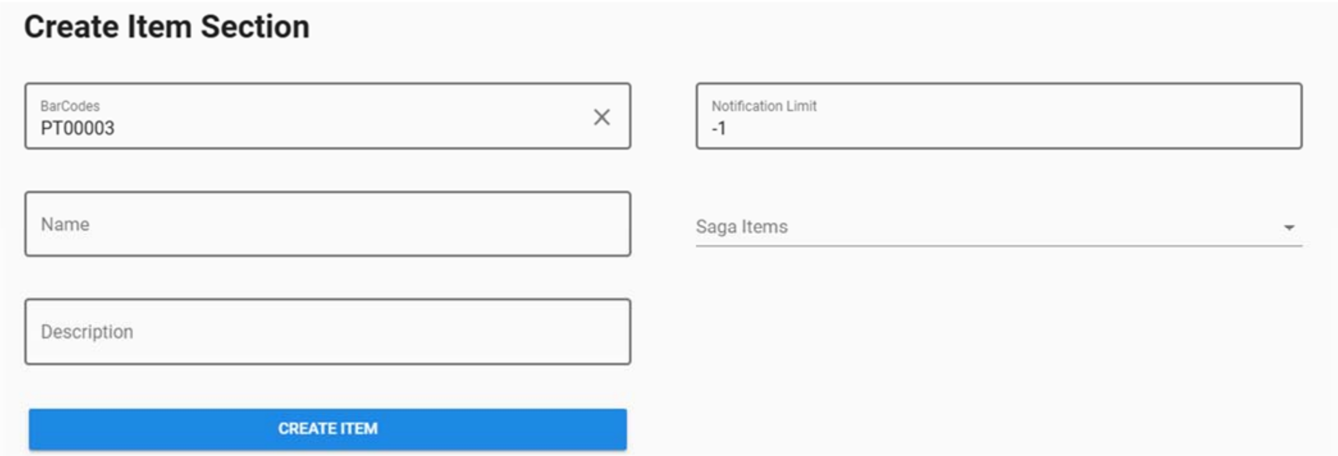


Closing an operation can be done in 3 different ways. By hitting the **CLOSE** button, all items will go inside the inventory. If the user clicks the **CLOSE AND CONSUME** button, an OUT Operation will be automatically created for all items, consuming them. If a user wants to click **CLOSE AND MOVE**, they must first select a Project. After closing the operation, EZ Manager automatically creates a Transfer Operation to the location of the project, transferring the items to the client.

The **GO TO OPERATION ITEMS** button, takes the user to the operation items page for the selected operation.



At the top of the screen, the user can add all the items on the invoice to the IN Operation. The user can use a barcode scanner to insert the barcode in the BarCode field. If the Barcode is recognized (already in inventory), EZ Manager will automatically select it.



If an item has been bought for the first time, at the bottom of the page there is a section dedicated for creating new items.

3.5.2 Generate IN Document

On the **Generate IN Document** page, the user can download a document for multiple IN Operations. By checking **Mark as Imported**, the operation will be marked and hidden from now on.

The **SHOW IMPORTED** button acts as a trigger between **SHOW IMPORTED** and **SHOW ONLY NEW**.

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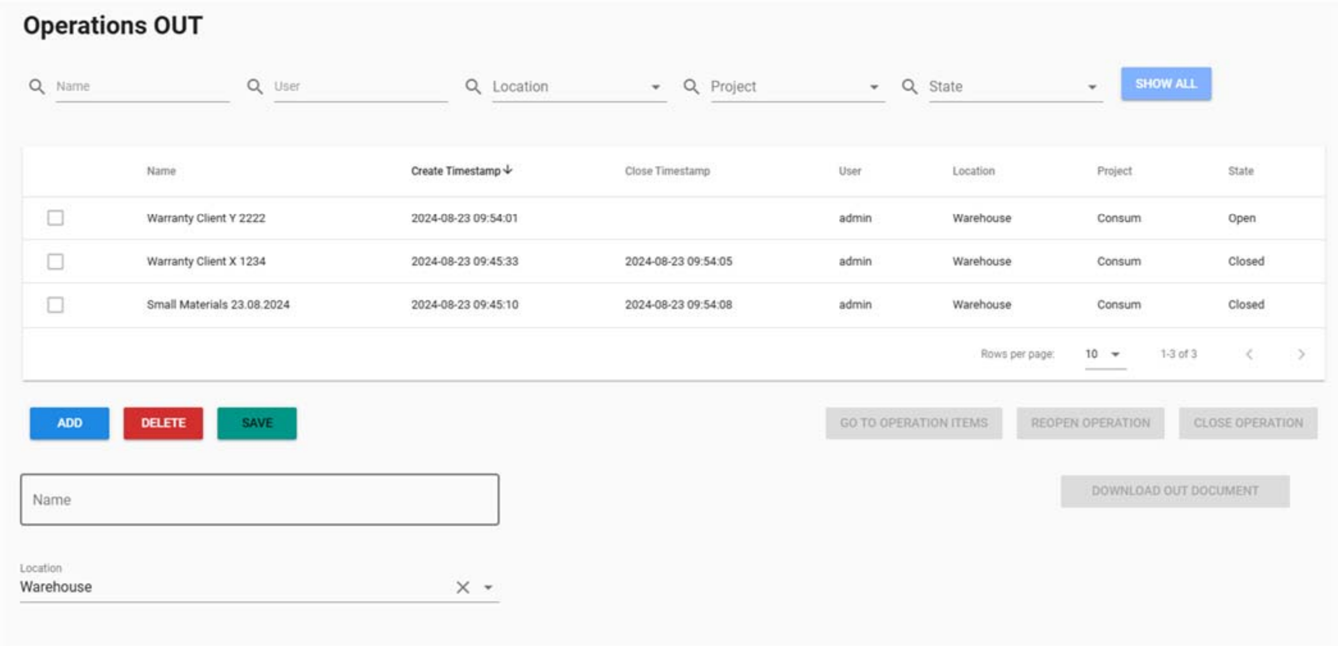
www.anyazilim.com.tr

3.5.3 Operations OUT



On the **Operations OUT** page, the user with **InventoryOUT** rights can create, delete and update OUT operations.

An OUT Operation must have a name. The location is selected in the layout at the top of the screen and it can't be changed on this page.

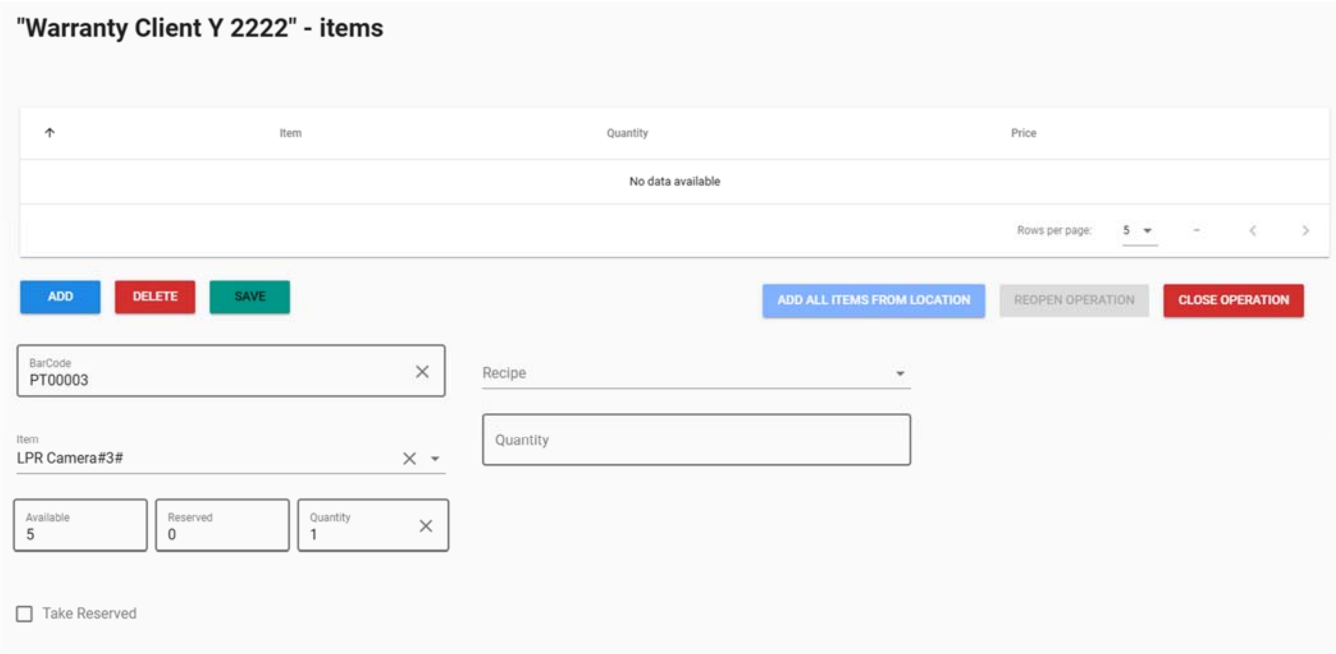
The **SHOW ALL** button at the top of the screen acts as a toggle between **SHOW ALL** and **SHOW LESS**. By default, the page will only load the last 3 closed operations along with all Open operations. If the user wants to see all operations they must click the **SHOW ALL** button.

The user can filter through the table using the Name, User, Location, Project and State fields at the top of the page.

The **REOPEN OPERATION** button, reopens the selected operation. Operations can only be reopened in the first 7 days after being inserted.

The **CLOSE OPERATION** button, closes the operation, finalizing the transaction. Before closing an operation, no change from that operation will appear inside the inventory.

The **GO TO OPERATION ITEMS** button, takes the user to the operation items page for the selected operation.

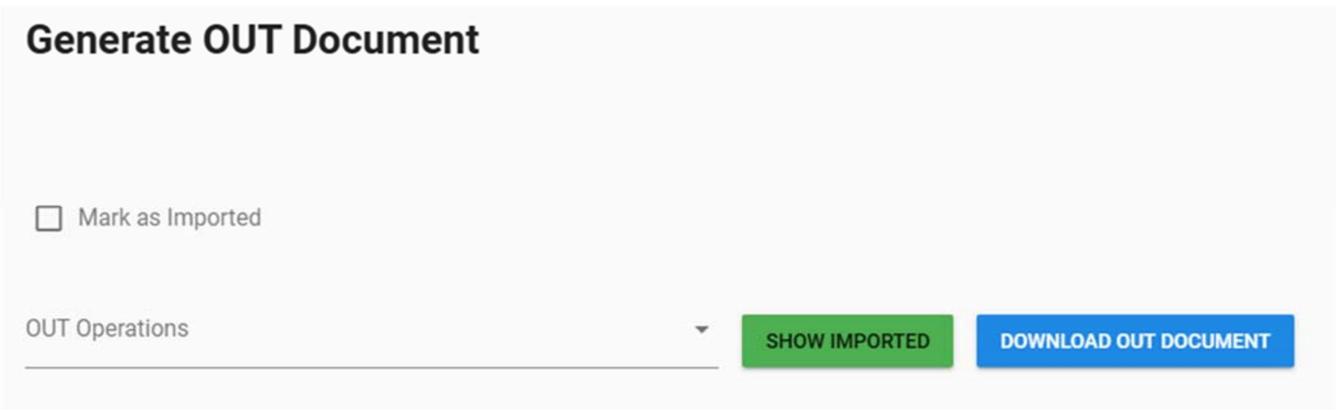


At the top of the screen, the user can add all the items on the OUT Operation. The user can use a barcode scanner to insert the barcode in the BarCode field. If the Barcode is recognized (already in inventory), EZ Manager will automatically select it.

On the left side of the page, the user can add items one by one. In the middle, using the Recipe and Quantity field below it, the user can add items according to a predefined recipe, streamlining the process.

The **ADD ALL ITEMS FROM LOCATION** button can be used to clear out a location. This button adds all items from the operations location to this operation, leaving the location empty.

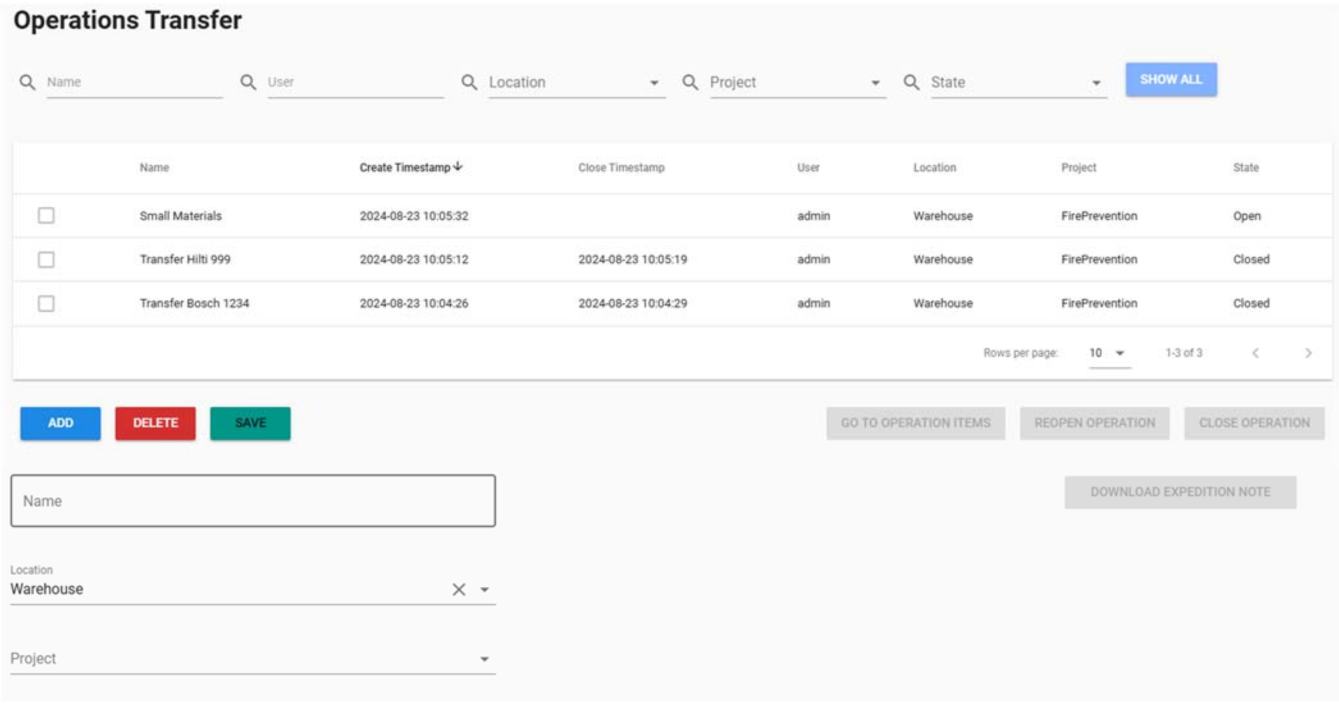
3.5.4 Generate OUT Document



On the **Generate OUT Document** page, the user can download a document for multiple OUT Operations. By checking **Mark as Imported**, the operation will be marked and hidden from now on.

The **SHOW IMPORTED** button acts as a trigger between **SHOW IMPORTED** and **SHOW ONLY NEW**.

3.5.5 Transfers



On the **Transfers** page, the user with **Transfer** rights can create, delete and update Transfer.

A Transfer must have a name and a Project. The location is selected in the layout at the top of the screen and it can't be changed on this page.

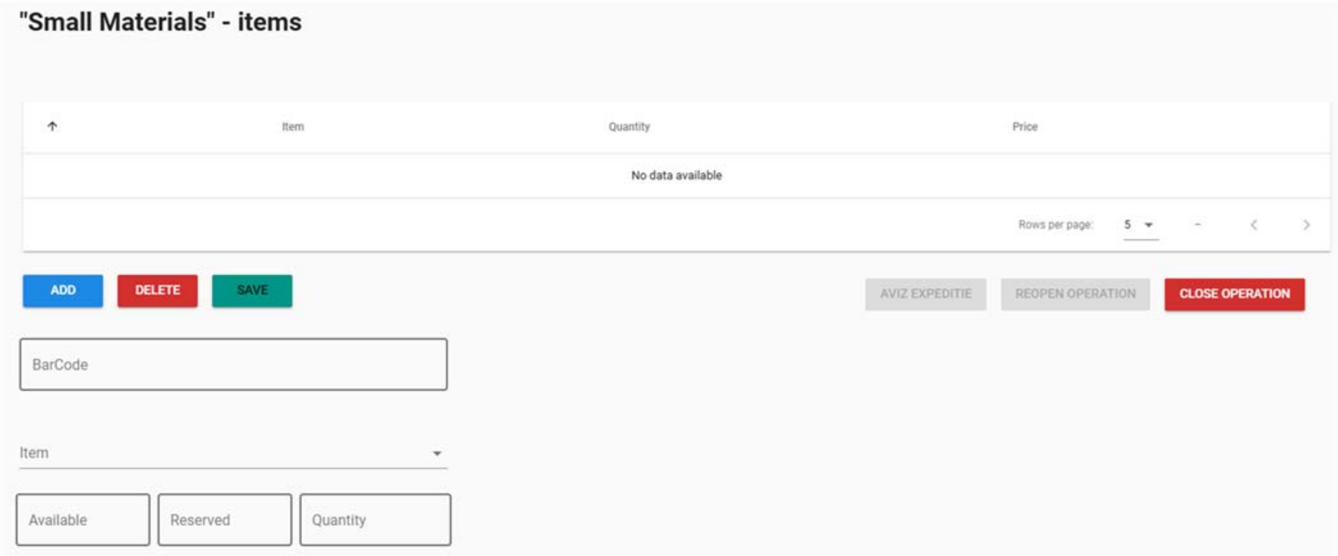
The **SHOW ALL** button at the top of the screen acts as a toggle between **SHOW ALL** and **SHOW LESS**. By default, the page will only load the last 3 closed transfers along with all Open transfers. If the user wants to see all transfers they must click the **SHOW ALL** button.

The user can filter through the table using the Name, User, Location, Project and State fields at the top of the page.

The **REOPEN OPERATION** button, reopens the selected transfer. Operations can only be reopened in the first 7 days after being inserted, if no item that has been transferred has been already invoiced to the client.

The **CLOSE OPERATION** button, closes the operation, finalizing the transaction. Before closing a transfer, no change from that operation will appear inside the inventory.

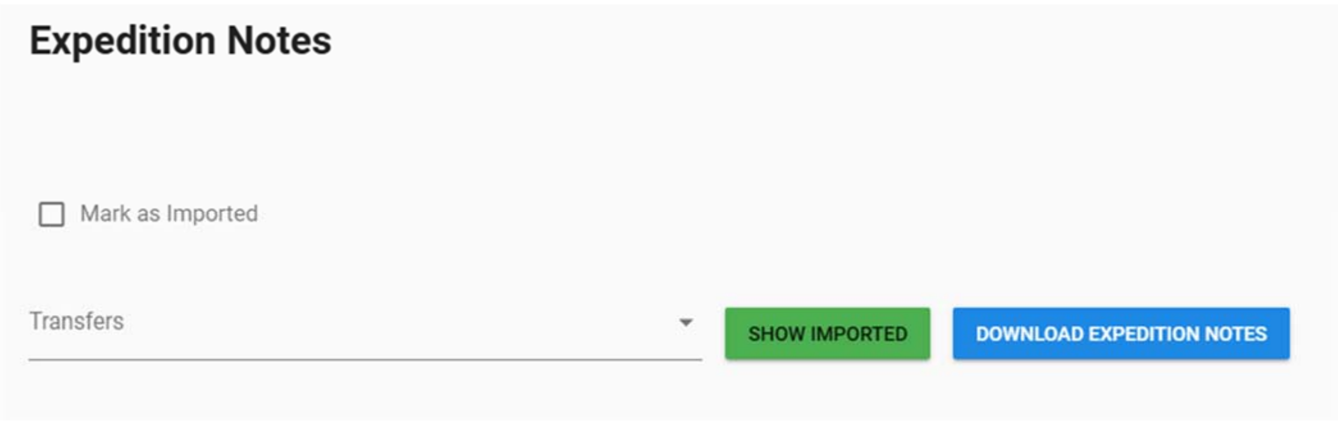
The **GO TO OPERATION ITEMS** button, takes the user to the operation items page for the selected operation.



On the **Operation Items** page, the user can add all the items on the Transfer. The user can use a barcode scanner to insert the barcode in the BarCode field. If the Barcode is recognized (already in inventory), EZ Manager will automatically select it.

The Available and Reserved field are read-only and serve just as information for the user.

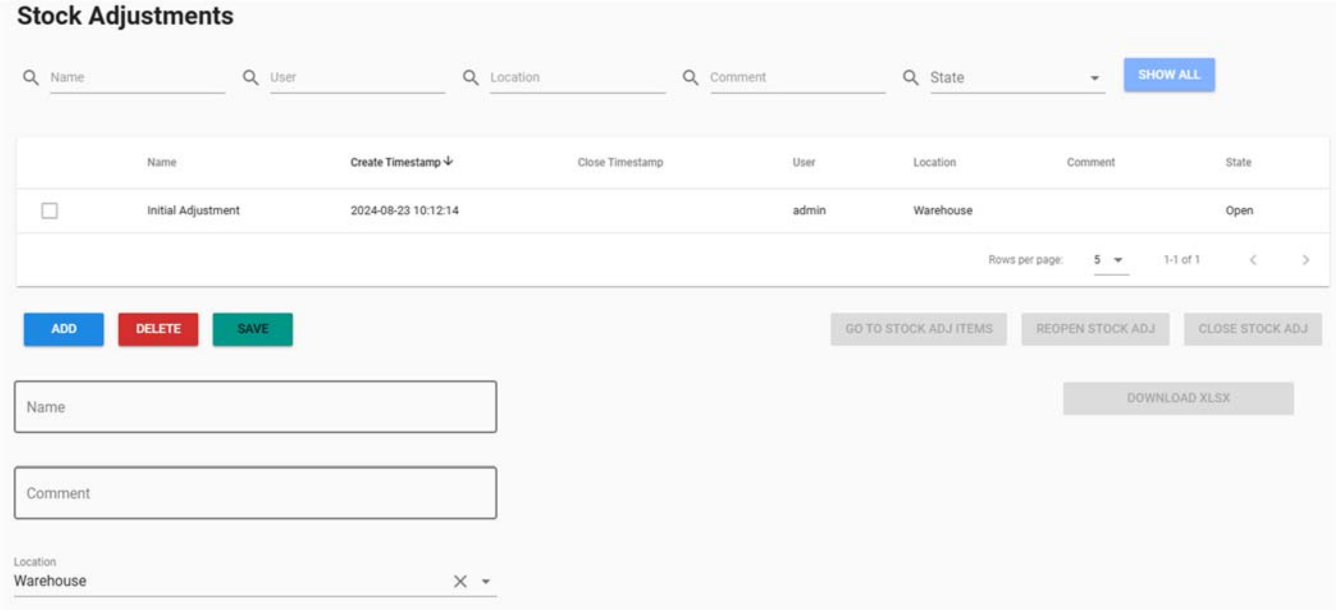
3.5.6 Generate Expedition Notes



On the **Generate Expedition Notes** page, the user can download a expedition notes for multiple Transfers. By checking **Mark as Imported**, the operation will be marked and hidden from now on.

The **SHOW IMPORTED** button acts as a trigger between **SHOW IMPORTED** and **SHOW ONLY NEW**.

3.5.7 Stock Adjustments



On the **Stock Adjustments** page, a user with **Configuration** rights can create, delete or update a stock adjustment. Stock Adjustments alter the inventory without an IN Invoice, OUT reason or Transfer to a client. This can be useful when items are broken by accident, lost etc.

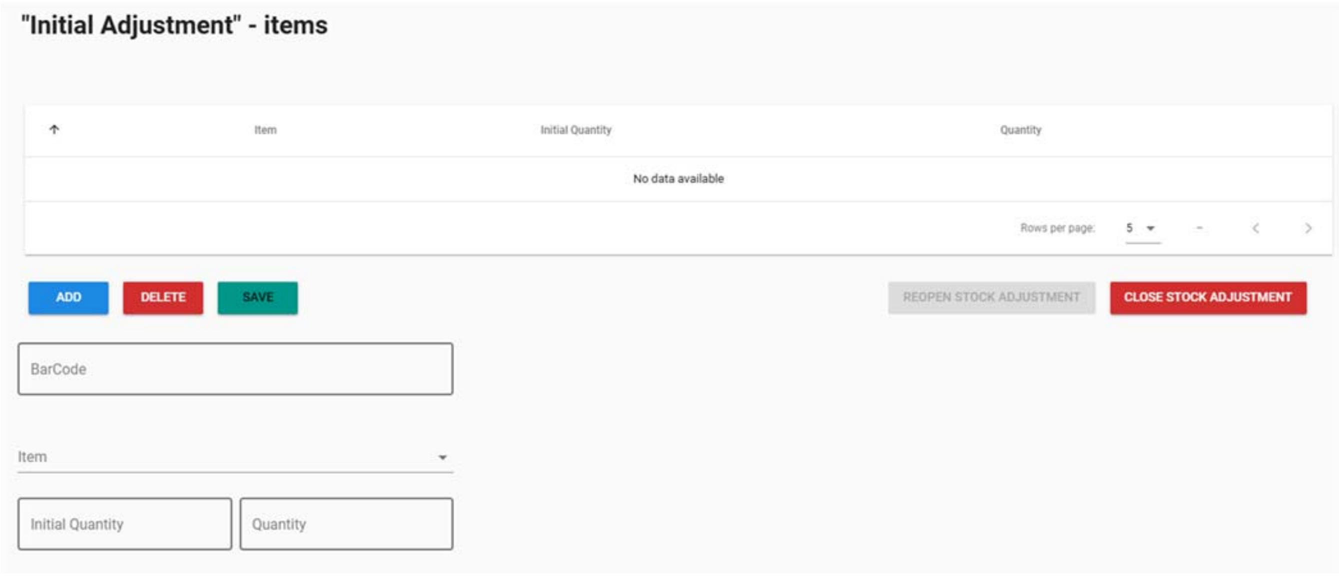
The **SHOW ALL** button at the top of the screen acts as a toggle between **SHOW ALL** and **SHOW LESS**. By default, the page will only load the last 3 closed stock adjustments along with all Open ones. If the user wants to see all stock adjustments they must click the **SHOW ALL** button.

The user can filter through the table using the Name, User, Location, Comment and State fields at the top of the page.

The **REOPEN STOCK ADJ** button, reopens the selected stock adjustment. Stock Adjustments can only be reopened in the first 7 days after being created, if no change has been done to the items contained.

The **CLOSE STOCK ADJ** button, closes the stock adjustment, finalizing the transaction. Before closing a stock adjustment, no change from that operation will appear inside the inventory.

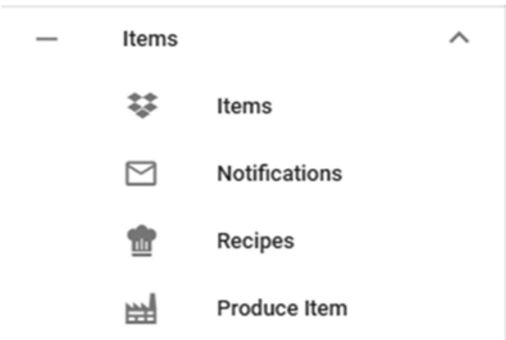
The **GO TO STOCK ADJ ITEMS** button, takes the user to the stock adjustment items page for the selected stock adjustment.



On the **Stock Adjustment Items** page, the user can add all the items on the stock adjustment. The user can use a barcode scanner to insert the barcode in the BarCode field. If the Barcode is recognized (already in inventory), EZ Manager will automatically select it.

Initial Quantity is a read only field that will be automatically filled when selecting an item. The quantity field must be completed by the user.

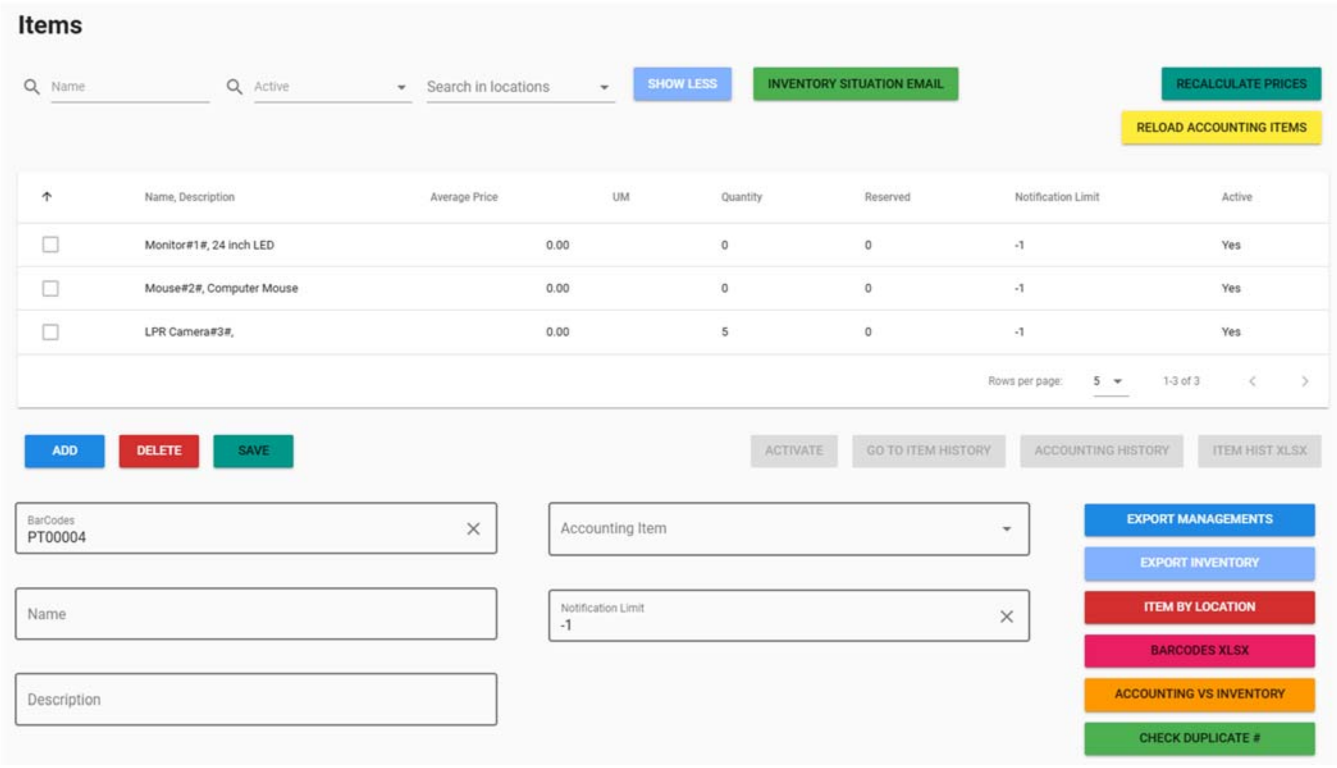
3.6 Items



In the **Items** page group, the user may find the following pages: Items, Notifications, Recipes and Produce Item.

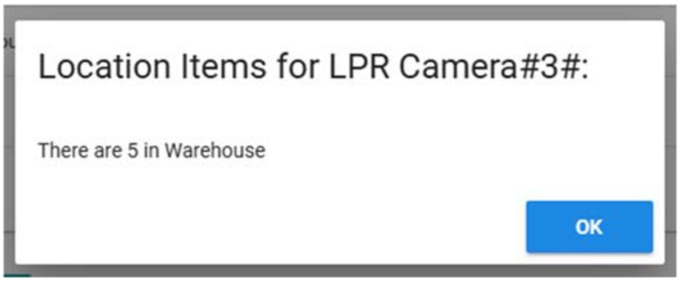
In this group, the user may manage all things related to items.

3.6.1 Items



On the **Items** page, the user can create, delete or update inventory items.

The user can filter through the table using the Name and Active fields at the top of the page.



The **Search in locations** field lets the user select an item, showing a popup of all the location that the item can be found in.

The **SHOW LESS** button at the top of the screen acts as a toggle between **SHOW ALL** and **SHOW LESS**. By default, items that have been deactivated are hidden. If the user wants to see all items they must click the **SHOW ALL** button.

The **INVENTORY SITUATION EMAIL** button sends an email containing all items in inventory that are in locations with management, letting employees know if any items need to be ordered.

The **RECALCULATE PRICES** button recalculates prices from the Accounting Application immediately. This process also happens automatically every couple of hours.

The **RELOAD ACCOUNTING ITEMS** button reloads all items from the accounting application, reestablishing the connection between the item in EZ Manager and the item in the Accounting Application.

The **ACTIVATE** button acts as a switch between **ACTIVATE** and **DEACTIVATE**, letting the user activate and deactivate items as necessary. An item can be deactivated when it is no longer in user and its quantity is 0.

The **GO TO ITEM HISTORY** button redirects the user to the **Item Hist** page, preselected the selected item and showing all transactions involving the item.

The **ACCOUNTING HISTORY** button shows a similar report to the item history one, but this one is taken from the Accounting Application.

The **ITEM HIST XLSX** button starts the download of an Excel file containing the Item History.

The **EXPORT MANAGEMENTS** button starts the download of an Excel file containing a sheet for each location with management, showing quantities for all items present.

The **EXPORT INVENTORY** button starts the download of an Excel containing a sheet for each location (with and without management), showing quantities for all items present.

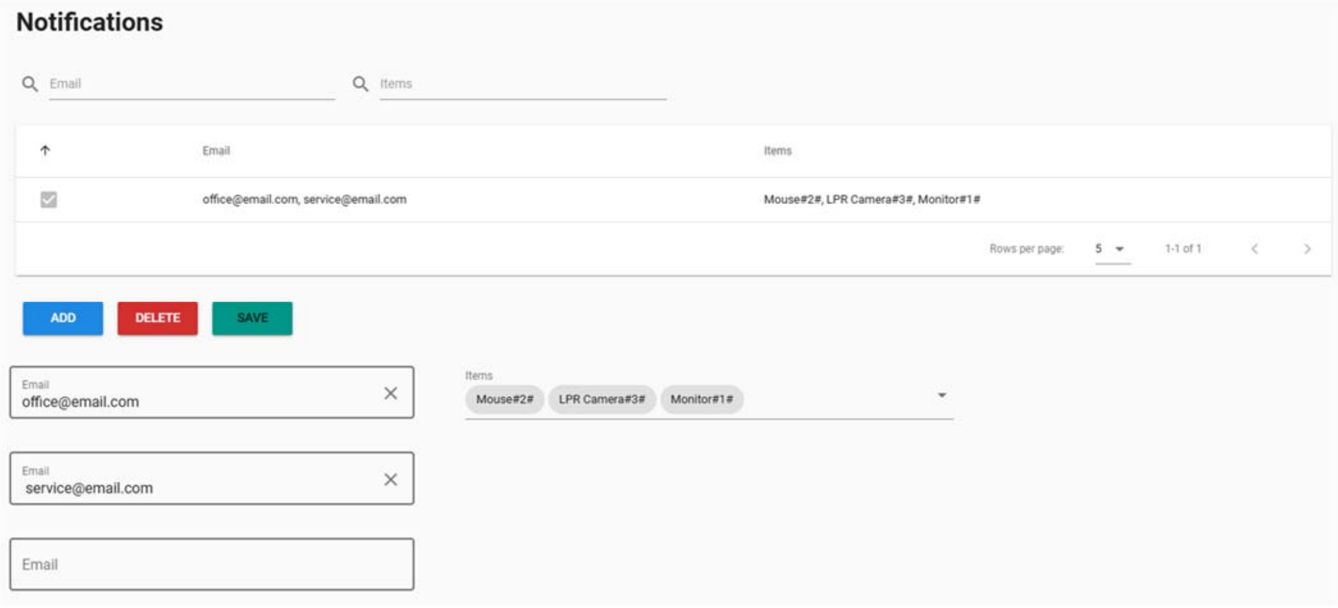
The **ITEM BY LOCATION** button starts the download of an Excel containing a sheet for each item with quantity over 0, showing each location the item is present in.

The **BARCODES XLSX** button starts the download of an Excel containing all items with all their barcodes. This can be useful for printing barcodes on sticker paper and attaching them to boxes containing the item.

The **ACCOUNTING VS INVENTORY** button starts the download of an Excel containing a sheet for every location with management, showing items that may have a different quantity in EZ Manager from the Accounting Application. This helps the user spot if there are any problems along the process.

The **CHECK DUPLICATE #** button check if there are any duplicate # in the Accounting Application. Hashes are used in order to make it easier to find any item by a unique id instead of a name.

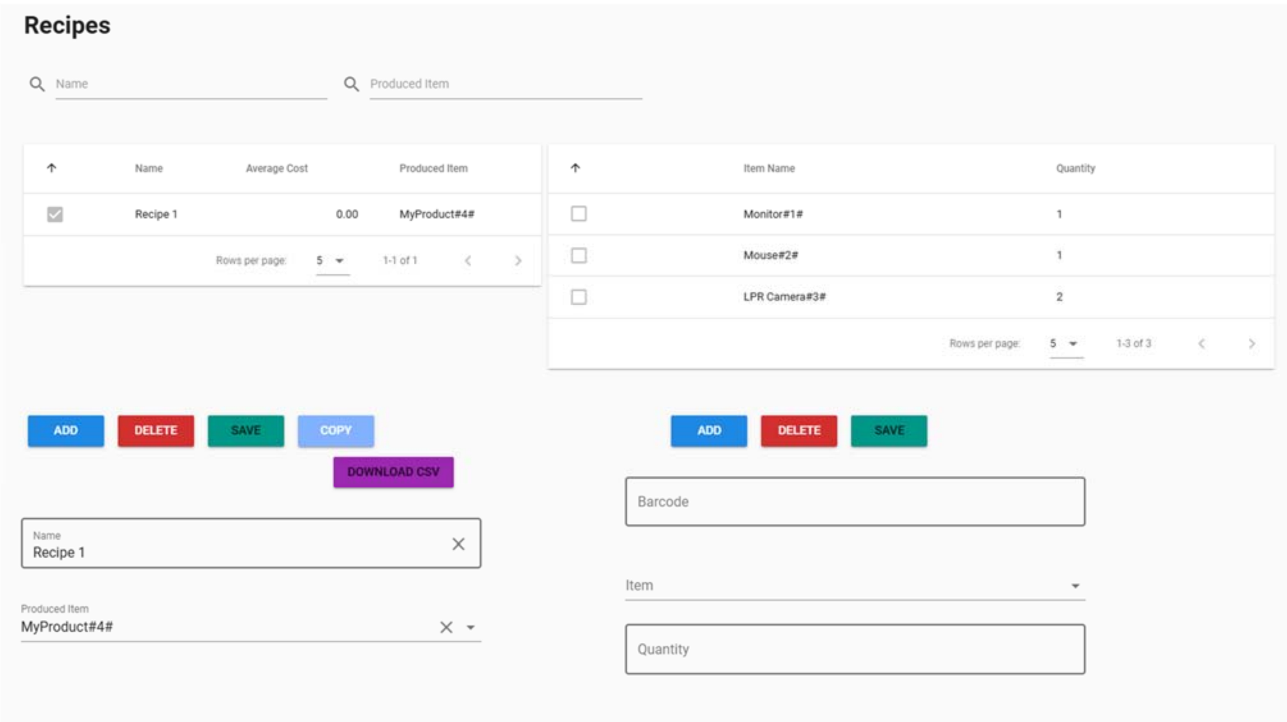
3.6.2 Notifications



On the **Notifications** page, the user can create, delete or update notifications.

All items have an attribute called Notification Limit. If the user does not want a notification for an item, this attribute will be set to -1. When the item quantity reaches below the Notification Limit, all users set in the notifications page will be sent an email. After restocking the item and going over the Notification Limit, notification is reset and will be send again once it reaches below.

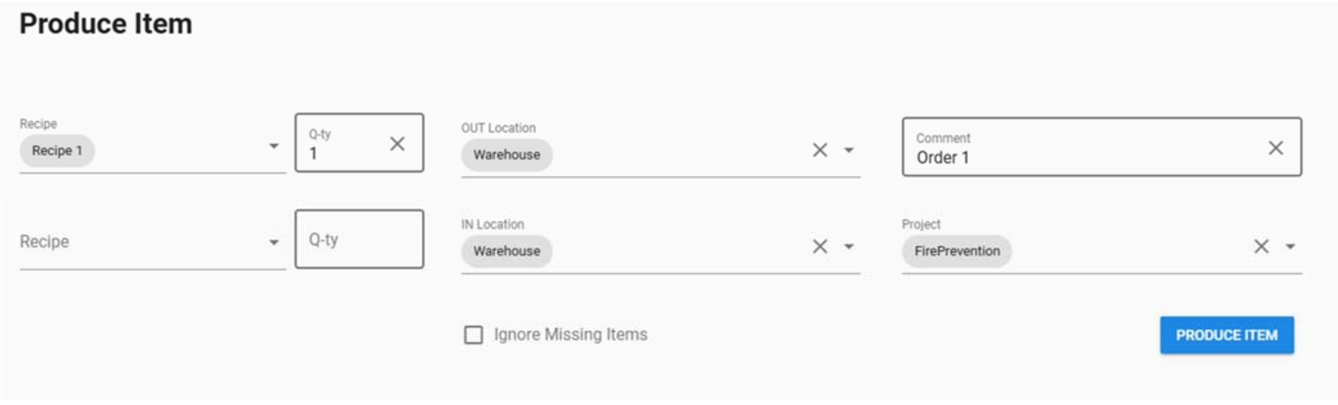
3.6.3 Recipes



On the **Recipes** page, the user can create, delete or update recipes. A recipe lets the user streamline production of an item.

The **COPY** button copies the selected recipe and creates a new identical one. This can help when produced items are similar, but have extra ingredients.

3.6.4 Produce Item



On the **Produce Item** page, the user can streamline the production process for items.

The user can produce multiple items at a time by selecting multiple recipes with their quantity.

OUT Location field represent a location with management from where the items necessary for production will be taken.

IN Location field represent a location with management where the produced item will go.

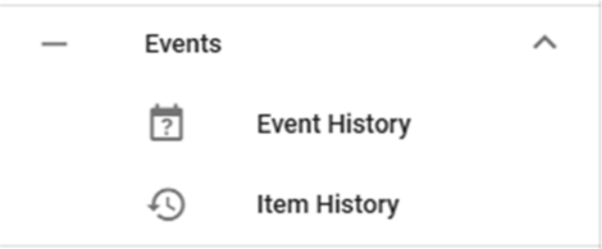
Comment field is optional.

Selecting a project will also streamline the transfer operation to the client of the produced item.

If we select Ignore Missing Items, EZ Manager will automatically use all items that it finds in current stock and will ignore the ones that are not found. This can be useful when reusing items that came from warranty or other sources.

After clicking the **PRODUCE ITEM** button, the application will automatically create an OUT Operation for all the items used in production, an IN Operation for the final products and a Transfer operation (only if Project is selected) to the client streamlining the entire process.

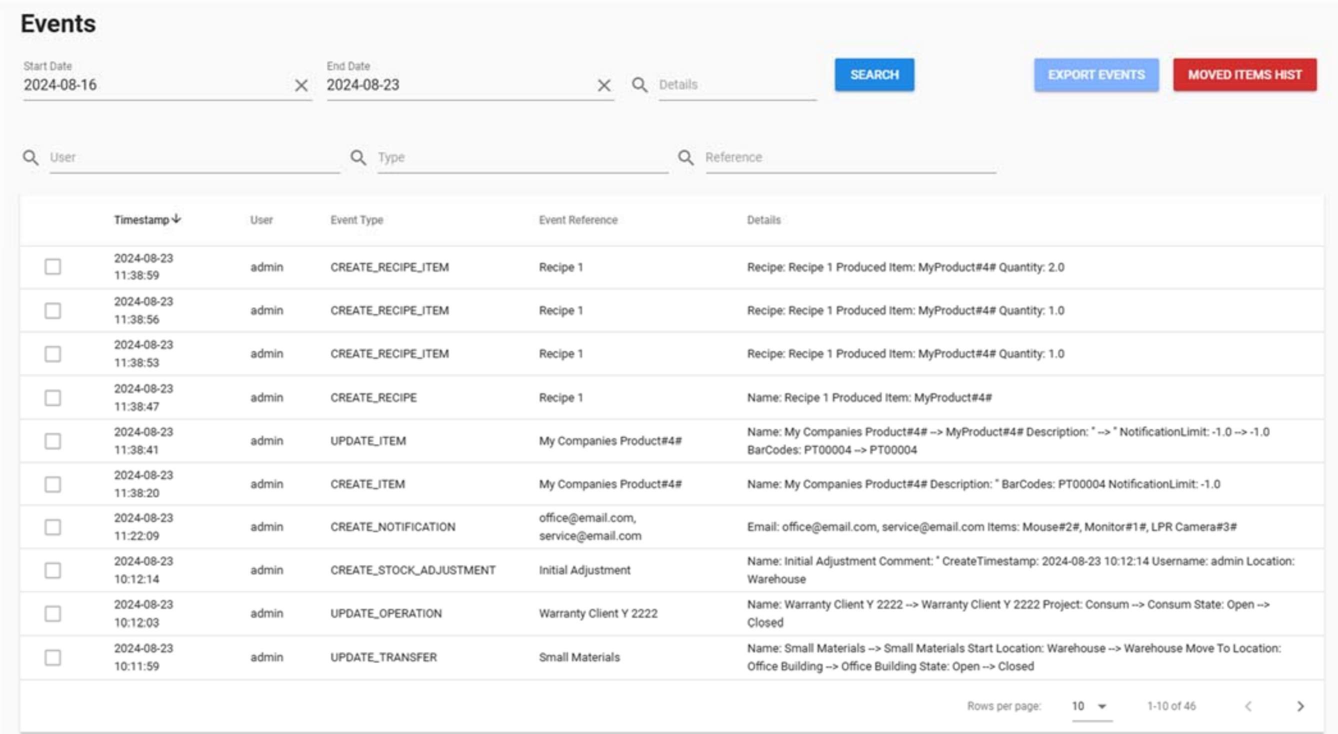
3.7 Events



In the **Events** page group, the user may find the following pages: Event History and Item History.

In this group, the user may see event logs.

3.7.1 Event History



Timestamp	User	Event Type	Event Reference	Details
2024-08-23 11:38:59	admin	CREATE_RECIPE_ITEM	Recipe 1	Recipe: Recipe 1 Produced Item: MyProduct#4# Quantity: 2.0
2024-08-23 11:38:56	admin	CREATE_RECIPE_ITEM	Recipe 1	Recipe: Recipe 1 Produced Item: MyProduct#4# Quantity: 1.0
2024-08-23 11:38:53	admin	CREATE_RECIPE_ITEM	Recipe 1	Recipe: Recipe 1 Produced Item: MyProduct#4# Quantity: 1.0
2024-08-23 11:38:47	admin	CREATE_RECIPE	Recipe 1	Name: Recipe 1 Produced Item: MyProduct#4#
2024-08-23 11:38:41	admin	UPDATE_ITEM	My Companies Product#4#	Name: My Companies Product#4# --> MyProduct#4# Description: '' --> '' NotificationLimit: -1.0 --> -1.0 BarCodes: PT00004 --> PT00004
2024-08-23 11:38:20	admin	CREATE_ITEM	My Companies Product#4#	Name: My Companies Product#4# Description: '' BarCodes: PT00004 NotificationLimit: -1.0
2024-08-23 11:22:09	admin	CREATE_NOTIFICATION	office@email.com, service@email.com	Email: office@email.com, service@email.com Items: Mouse#2#, Monitor#1#, LPR Camera#3#
2024-08-23 10:12:14	admin	CREATE_STOCK_ADJUSTMENT	Initial Adjustment	Name: Initial Adjustment Comment: '' CreateTimestamp: 2024-08-23 10:12:14 Username: admin Location: Warehouse
2024-08-23 10:12:03	admin	UPDATE_OPERATION	Warranty Client Y 2222	Name: Warranty Client Y 2222 --> Warranty Client Y 2222 Project: Consum --> Consum State: Open --> Closed
2024-08-23 10:11:59	admin	UPDATE_TRANSFER	Small Materials	Name: Small Materials --> Small Materials Start Location: Warehouse --> Warehouse Move To Location: Office Building --> Office Building State: Open --> Closed

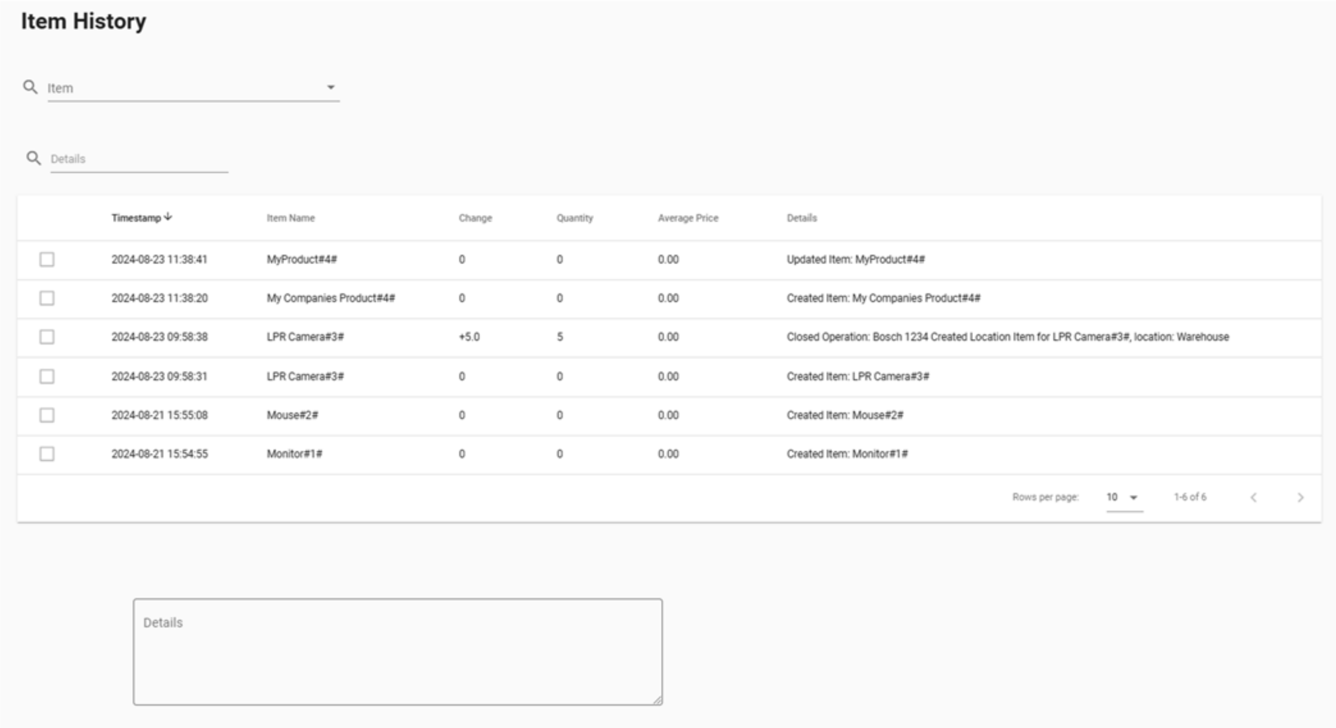
On the **Event History** page, the user can see all events from the EZ Manager Application.

The **EXPORT EVENTS** button starts the download of an Excel containing all events from the table below.

The **MOVED ITEM HIST** button start the download of an Excel containing all information on items that have been moved between locations with managements. For this kind of operation, a Transfer is not necessary and this is the only way to monitor it.

The user can filter through the table using the Start Date, End Date, Details, User, Type and Reference fields at the top. If Start Date or End Date has been modified the user must hit the **SEARCH** button.

3.7.2 Item History

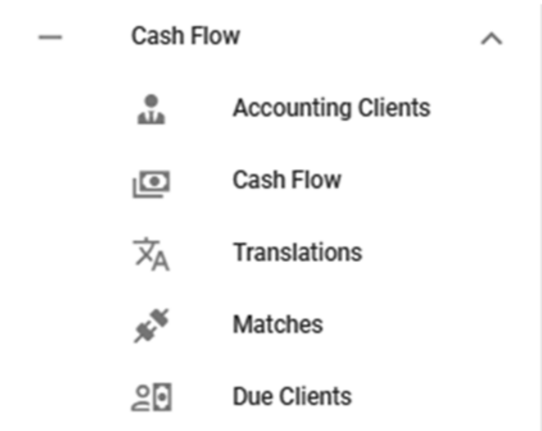


	Timestamp	Item Name	Change	Quantity	Average Price	Details
	2024-08-23 11:38:41	MyProduct#4#	0	0	0.00	Updated Item: MyProduct#4#
	2024-08-23 11:38:20	My Companies Product#4#	0	0	0.00	Created Item: My Companies Product#4#
	2024-08-23 09:58:38	LPR Camera#3#	+5.0	5	0.00	Closed Operation: Bosch 1234 Created Location Item for LPR Camera#3#, location: Warehouse
	2024-08-23 09:58:31	LPR Camera#3#	0	0	0.00	Created Item: LPR Camera#3#
	2024-08-21 15:55:08	Mouse#2#	0	0	0.00	Created Item: Mouse#2#
	2024-08-21 15:54:55	Monitor#1#	0	0	0.00	Created Item: Monitor#1#

On the **Item History** page, the user can find all event history regarding a specific item. This can help find all instances where a specific item might have been user.

The user can select the item using the Item field at the top. They can filter through the table using the Details field.

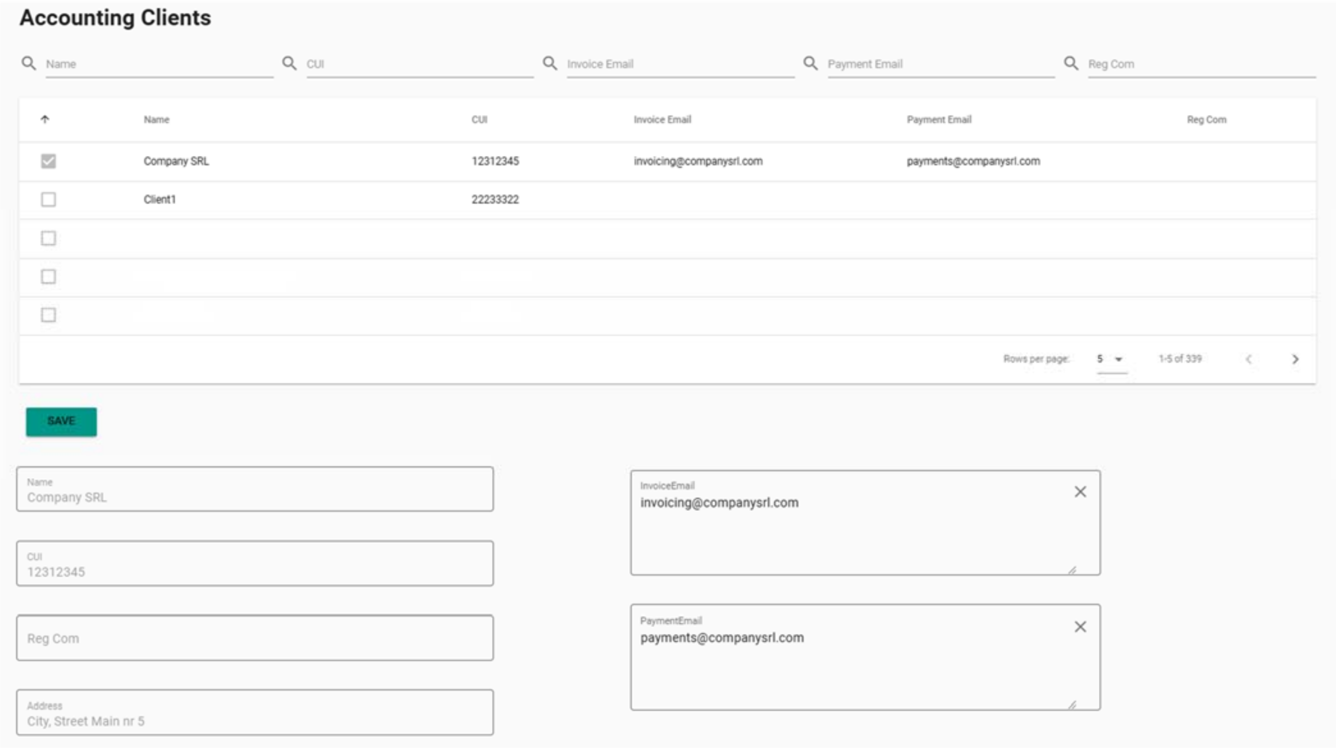
3.8 Cash Flow



In the **Cash Flow** page group, the user may find the following pages: Accounting Clients, Cash Flow, Translations, Matches and Due Clients.

In this group, the user may oversee the cash flow of the company.

3.8.1 Accouting Clients

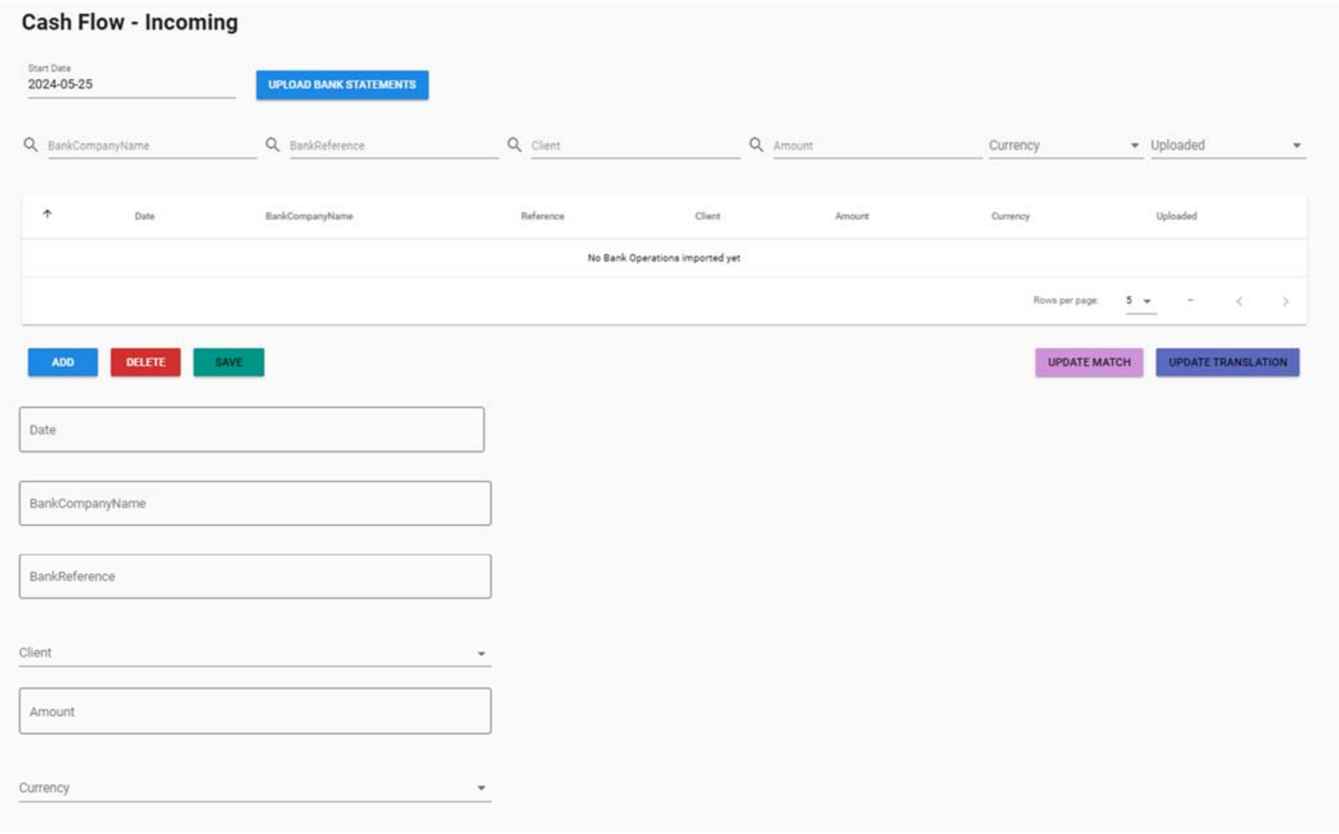


On the **Accounting Clients** page, the user can add or update the Invoice Email Address and the Payment Email Address of the clients imported from the Accounting Application. These email addresses will be used for sending automatic emails.

Every Client that has come overdue on invoices will be send an email everyday reminding them of payment.

After creating an invoice, the user can send an automatic email to the Invoice Email of the company containing the new invoice.

3.8.2 Cash Flow



On the **Cash Flow** page, the user can manage bank operations. Using the **UPLOAD BANK STATEMENTS** button, the user can upload csv containing bank transactions.

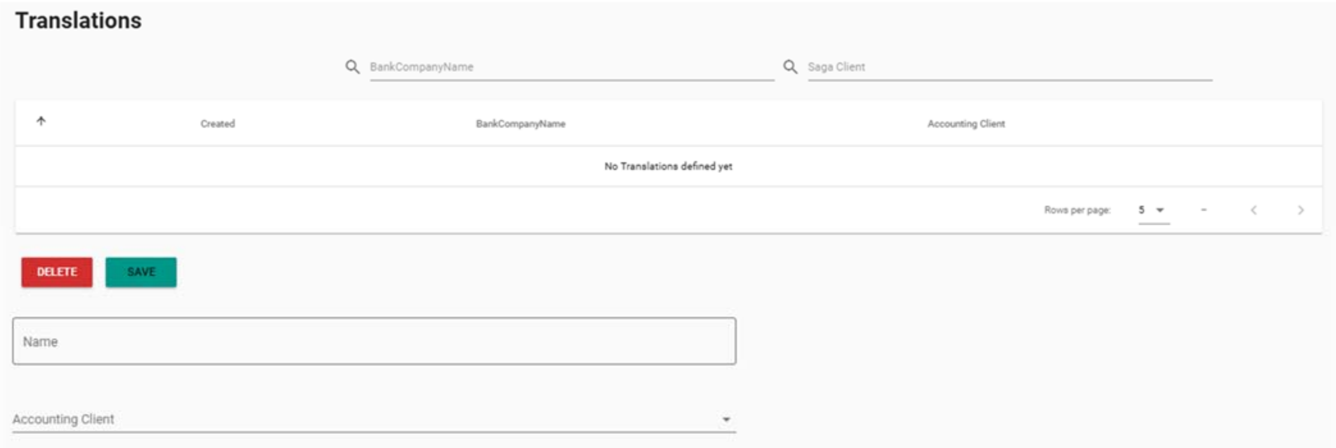
There is also an automation that can be installed that automatically downloads the csv files from the bank and upload them to EZ Manager.

The user can also create manual transactions (cash transactions that have not gone through the bank) in order to settle client's invoices.

Using the **UPDATE MATCH** button, the user can create a one-time match between the company name extracted from the bank and a client from the accounting application.

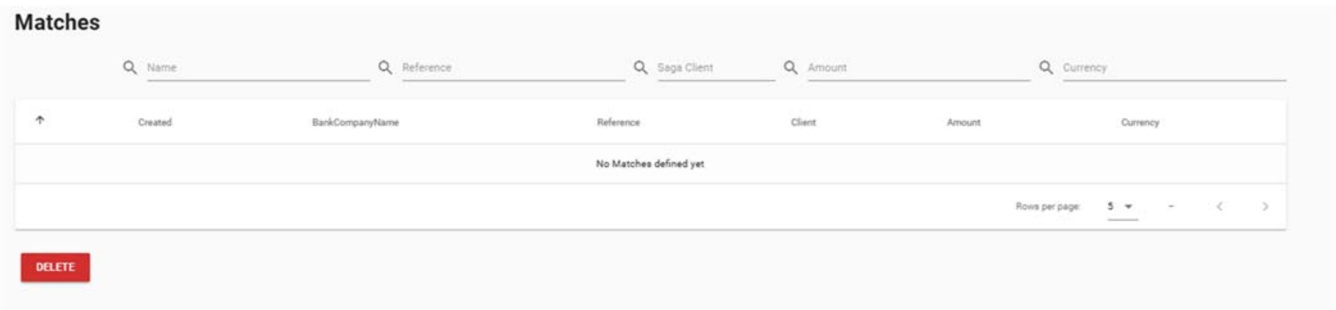
Using the **UPDATE TRANSALTION** button, the user can create a permanent match between the company name extracted from the bank and a client from the accounting application.

3.8.3 Translations



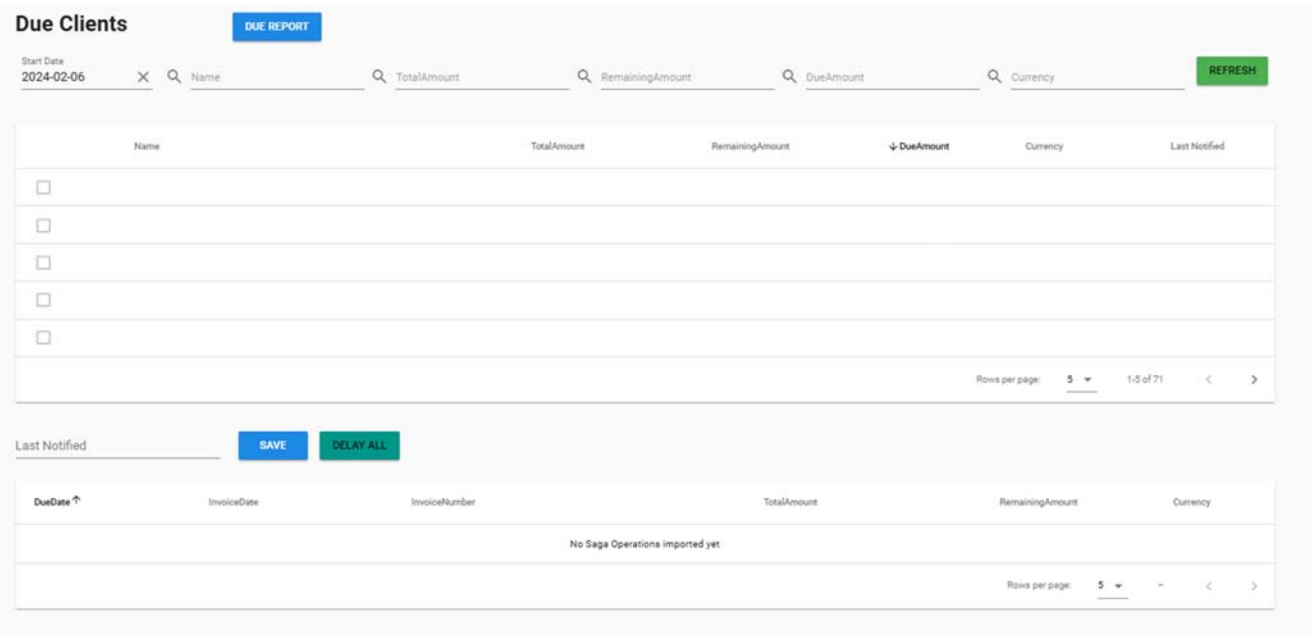
On the **Translations** page, the user can update or delete existing translations.

3.8.4 Matches



On the **Matches** page, the user can delete existing matches.

3.8.5 Due Clients



On the **Due Clients** page, the user can see due clients.

The user can delay the email notification by changing the Last Notified field to a value in the future. The user can delay all notification by using the **DELAY ALL** button.

The **DUE REPORT** button starts the download of an Excel containing invoices due for the company, helping the users stay on track with payments.

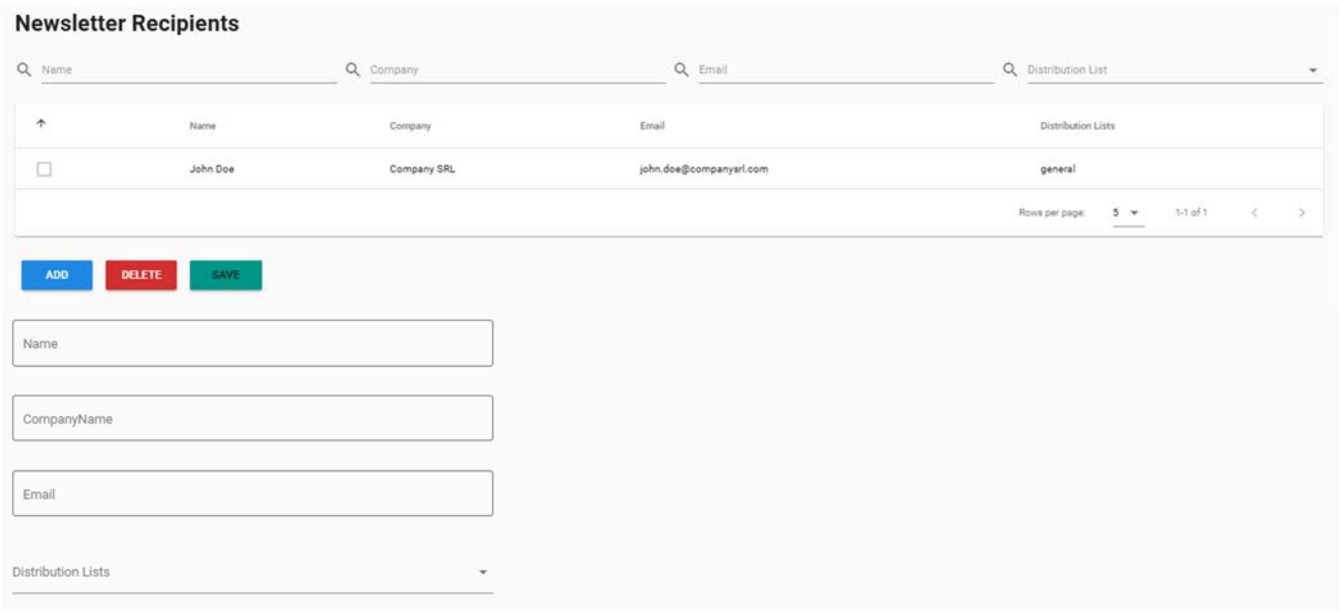
The user can filter through the table using the Start Date, Name, Total Amount, Remaining Amount, Due Amount and Currency fields at the top. If Start Date is changed, the user must hit the **REFRESH** button.

3.9 Newsletter

In the **Newsletter** page group, the user may find the following pages: Recipients and Distribution Lists.

In this group, the user may manage various newsletter that can be sent by the company.

3.9.1 Recipients

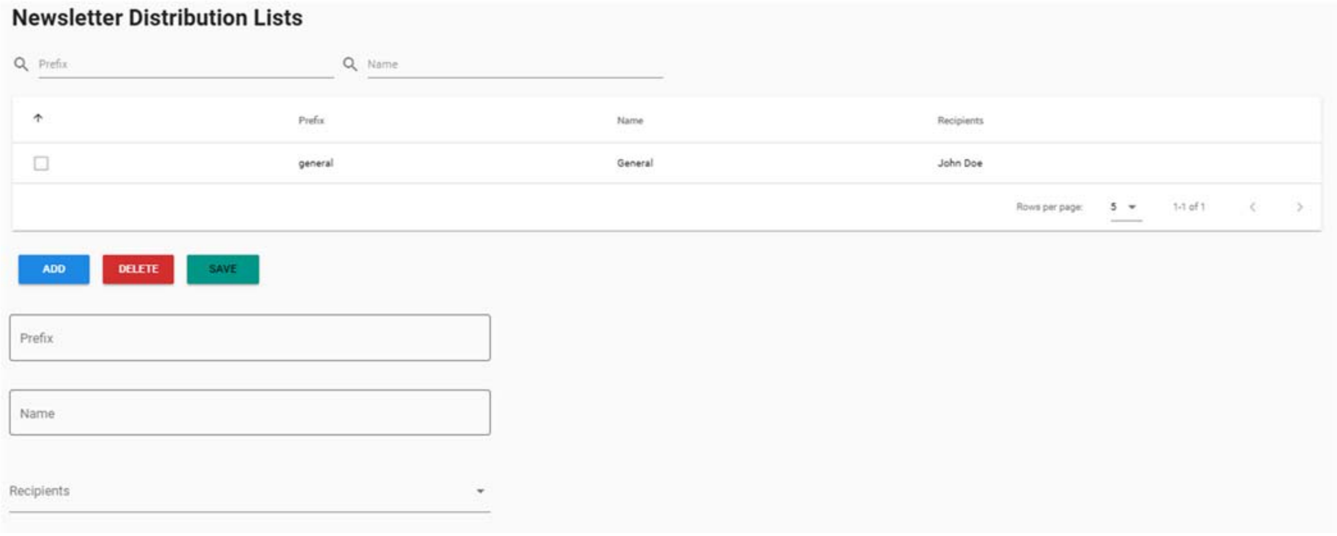


On the **Recipients** page, the user can create, delete or update newsletter recipients.

A Recipient must have a Name, Company Name and Email. This information can be used inside a newsletter email, personalizing every email sent. A recipient will receive newsletters for every distribution list he is on.

The user can filter through the table using the Name, Company, Email and Distribution List fields at the top.

3.9.2 Distribution Lists



On the **Newsletter Distribution Lists** page, the user can create, delete or update distribution lists.

A distribution list must have a Prefix and a Name.

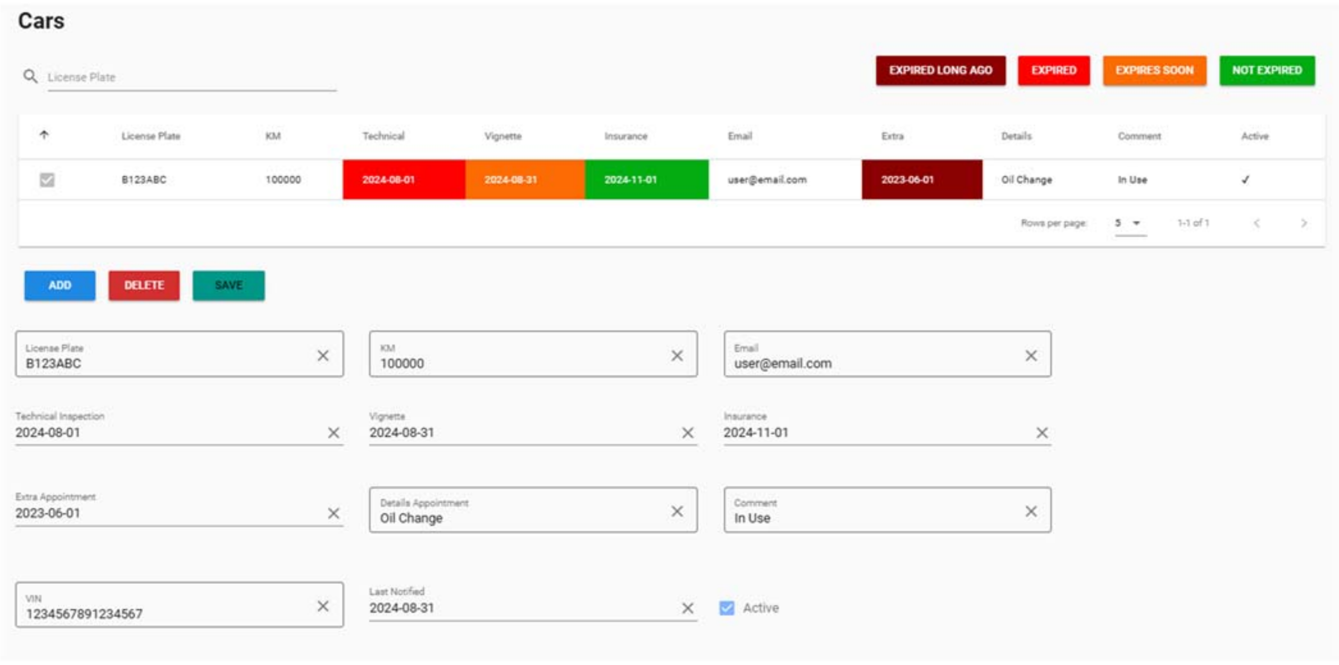
The Recipients list can be added from this page or from the Recipients page, effects taking place in both pages.

The user can filter through the table using the Prefix and Name fields at the top.

In order to send a newsletter email, the user must send an email to a predefined address inside his company. The email must have the subject: **PREFIX#Real Newsletter Subject**. The contents of the email will be then redirected to the Recipients of the Newsletter Distribution list that corresponds with the PREFIX.

The user can add %Name% and %CompanyName% inside the body of the newsletter and EZ Manager will automatically replace these placeholders with the real values of the recipients, streamlining the creating of personalized email newsletters.

3.10 Cars



On the **Cars** page, the user can manage the car fleet of the company. Here they can add information about Technical Inspection, Vignette, Insurance and an Extra Appointment for every car. The user of the car will be notified if any of the above are coming soon. They will also be notified if any of the above are expired and they must immediately fix the issue.

In order to make sure drivers don't miss their emails, in the last week before expiration and after expiration, the office email of the company will be included in order for the office employees to help remind the driver of his activities.

3.11 Change Password

On the **Change Password** page, the user can change their password for logging in to EZ Manager.

4. Support

For further support please contact AN YAZILIM at office@anyazilim.com.tr.

MERKEZ MAH SECKIN SK Z OFIS NO: 2-4A IC KAPI NO: 304, KAGITHANE, ISTANBUL
contact@anyazilim.com.tr
www.anyazilim.com.tr