**SILVALEA**®

# Users Manual:

# Spindle Self Serve

Spindle
**Self Serve**

**DRAYCIR**®

# Table of Contents

# 1. Registration

Sign in

| | |
|---|---|
| Email | |
| Password | |

**Log In**    Forgot Password?

①

Click here to Register.

Before logging in for the first time you must register, you can do this by clicking the link **(1)** which will take you to the following page

## Registration

**YOUR DETAILS**

First Name

Last Name

Your Company Name

Your Account No                                    *Optional*

**LOGIN DETAILS**

Email

Password

Confirm Password

**TERMS**

I agree to the terms ☐        **View Terms & Conditions**

s432Y
Generate New Image

**Type the code from the image**

**Register**    **Back**

To reset a password on an existing account, click here.

Here you can enter the details that you want linked with this account. Once the account has been created it must be authorised, you will be notified by an email to the account you registered with when this has occurred. Once you have been authorised you can log into your dashboard.

# 2. Selecting an Account

Once you have logged in you will be taken to the dashboard page.
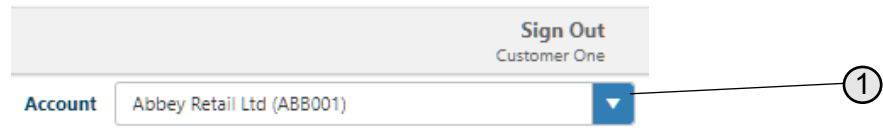


If you have access to more than one account, there will be a drop-down box near the top right of your browser screen **(1)**. You can use the drop-down box to switch between accounts. If you only have access to one this space will be empty.

# 3. Account Overview

On the left-hand side of the dashboard page there is an overview of your account displaying your current balance and the status of your invoices.



## 3.1. Basic Account Overview

The first section **(1)** is the basic account overview with; the account number linked to your account, the status of the account, the credit limit, the balance, and the terms.

## 3.2.    Status of Outstanding Invoices

The second section **(2)** gives information on your outstanding invoices with the number and value of invoices which are, in terms, overdue, and in query.

| INVOICES | | |
|---|---|---|
| In Terms | 2 / £3,858.95 | ❯ |
| Overdue | 8 / £16,260.69 | ❯ |
| In Query | 1 / £704.43 | ❯ |

# 4. Invoice and Credit Note History



## 4.1. Most Recent Invoices and Credit Notes

The five most recent invoices/ credit notes are displayed on the dashboard screen (1) this section gives an overview of the last five transactions, giving information on the status, type of transaction, document number, the due date of any invoices, the date filed, the full value and how much is still outstanding. You can also view the origional invoice or credit as a PDF where available.

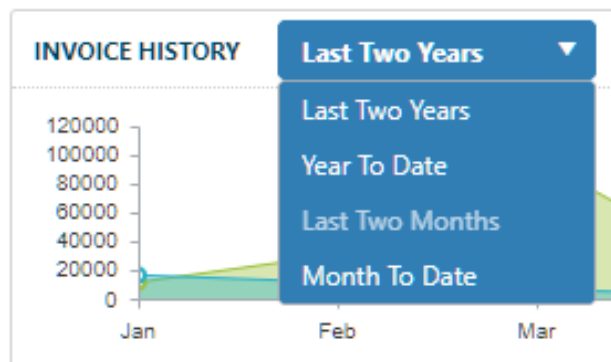Selecting the 'Invoices' tab **(2)** takes you to the following page.
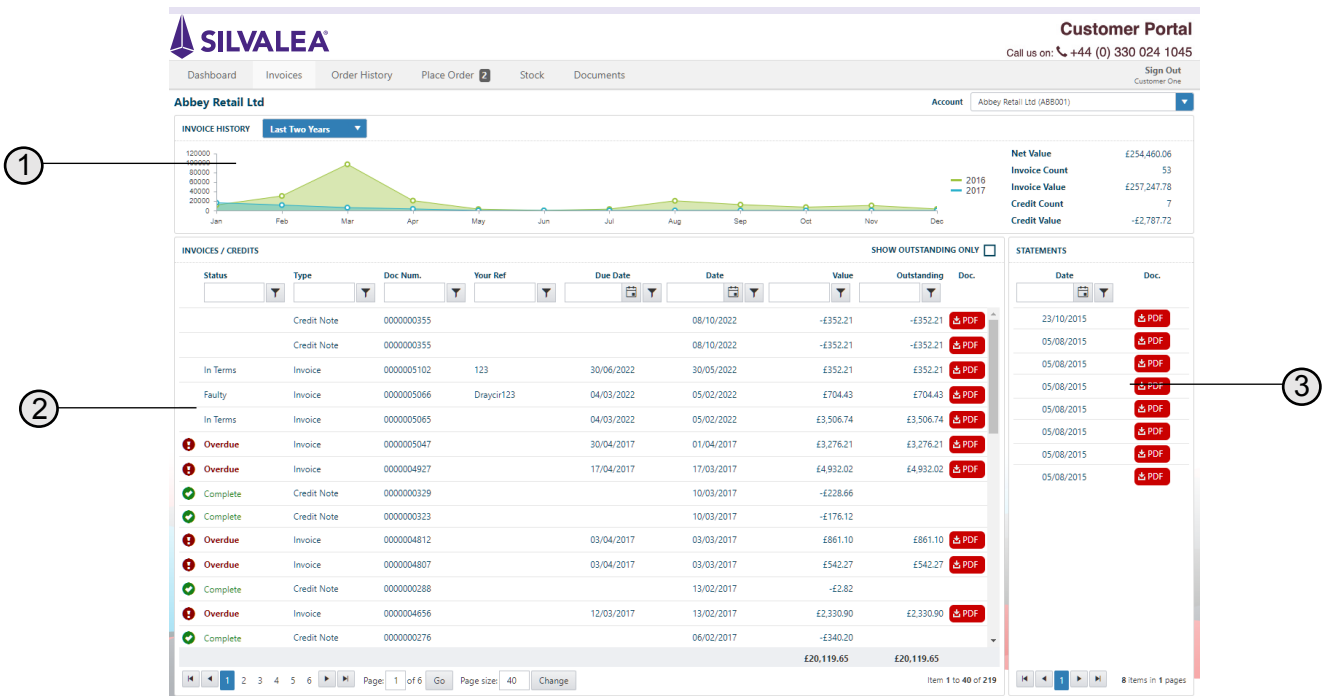


This page shows a complete history of all your invoices and credit notes .
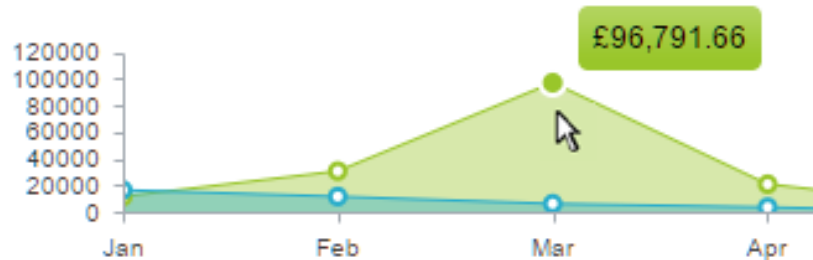
## 4.2. Graphical Summary of Invoices and Credit Value
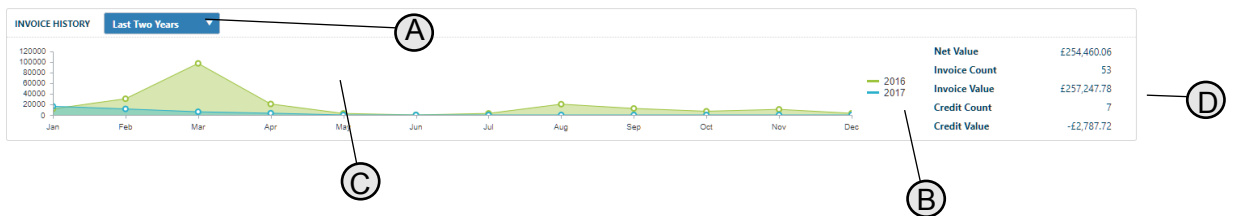


At the top of the page **(1)** there is a graphical display of your invoice history with the net worth of your invoices displayed over a certain time period.

You can click the drop-down box **(A)** to change the time period that you are looking at; the last 2 calendar years including the one you are currently in, the current year up to the current date, the last two months, and from the beginning of the current month up to the current date.

By clicking on one of the years in the key **(B)** you can remove that year from the graph or add it back in.



By hovering your mouse over one of the data points **(C)** you can see exactly what the net worth of the invoices were during that time period.

| | |
|---|---|
| Net Value | £254,460.06 |
| Invoice Count | 53 |
| Invoice Value | £257,247.78 |
| Credit Count | 7 |
| Credit Value | -£2,787.72 |

The section in the top right **(D)** gives you a total; net value, invoice count, invoice value, credit count, and credit value for the full time period that you have currently selected.

## 1.1. Full List of Invoices and Credit Notes



The main section of the page **(1)** gives full information on the status, type of transaction, document number, due date, date filed, full value, and how much is yet to be paid on every transaction from the creation of your account. You can also view any invoice or credit note in PDF form.

You can also change the number of transactions shown on every page by changing the number in the box (A) and clicking change, so that you can view every transaction on one page

## 4.3. Financial Statements



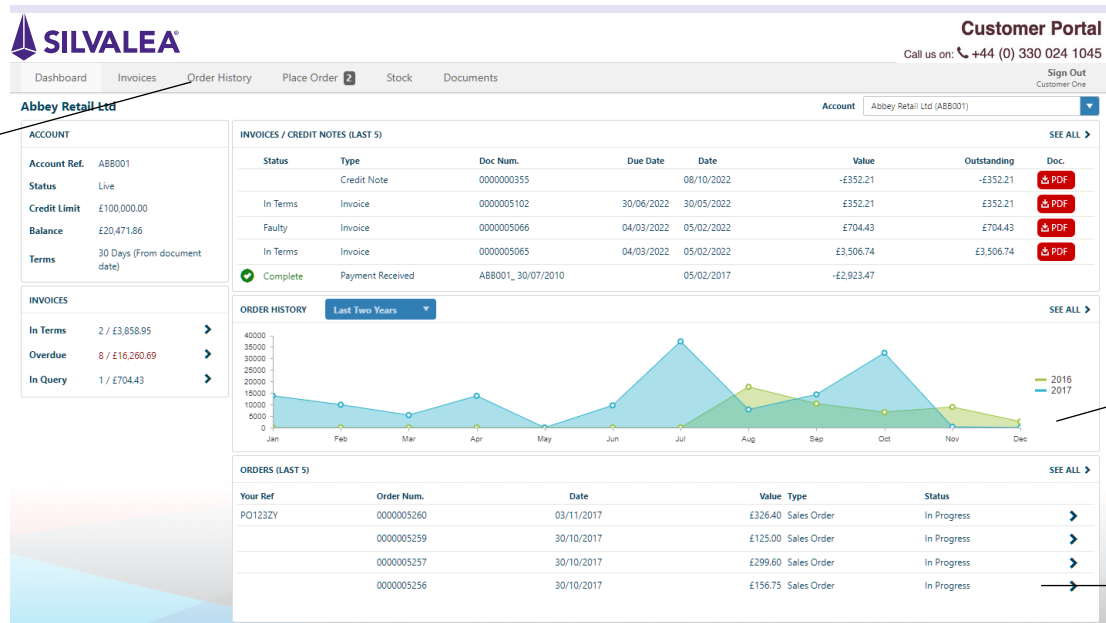The last section on this page is **(3)** where you can view all your previous statements and download them in PDF form. You can also search for specific ones by date.

# 5. Your Order History



## 5.1. Graphical Overview of Previous Orders

The quickest way to see an overview of your order history is on the dashboard **(1)** where you can see your order history over a given time period displayed graphically.
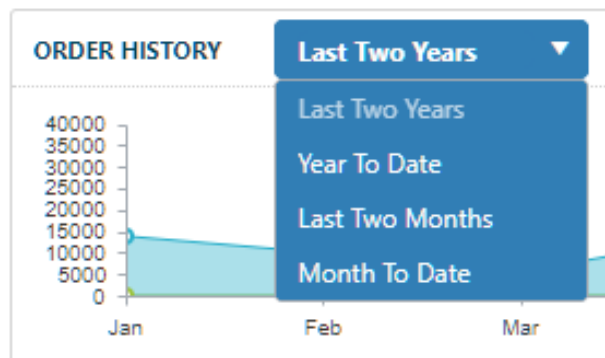


You can click the drop-down box to change the time period that you are looking at; the last 2 calendar years including the one you are currently in, the current year up to the current date, the last two months, and from the beginning of the current month up to the current date.
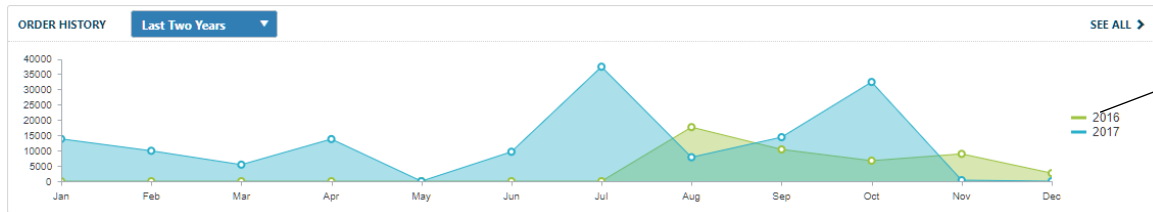
By clicking on one of the years in the key **(A)** you can remove that year from the graph or add it back in by clicking again.
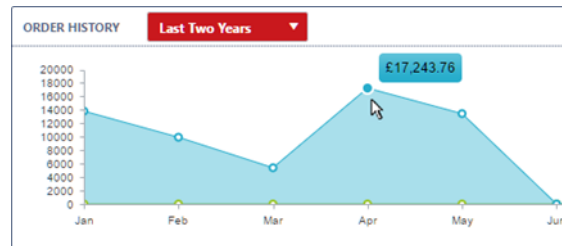


By hovering your mouse over one of the data points you can view the total value of orders during that time period.

## 5.2.    **Most Recent Orders**

For details on your most recent orders, the lower section of the screen **(2)** gives you all the details on your 5 most recent orders.
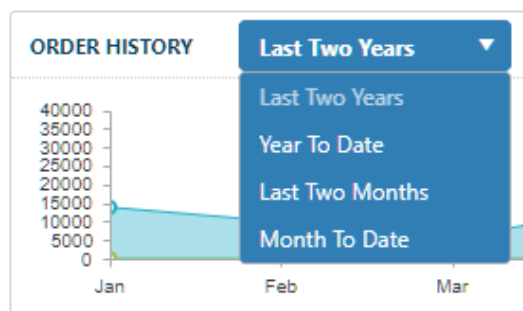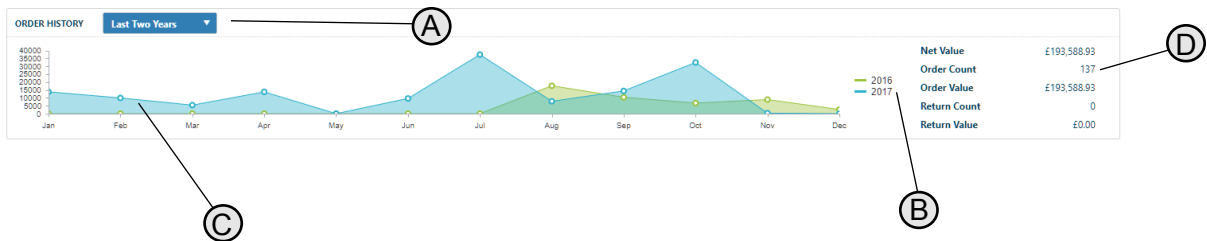
| ORDERS (LAST 5) | | | | | | SEE ALL > |
|---|---|---|---|---|---|---|
| Your Ref | Order Num. | Date | Value | Type | Status | |
| PO123ZY | 0000005260 | 03/11/2017 | £326.40 | Sales Order | In Progress | > |
| | 0000005259 | 30/10/2017 | £125.00 | Sales Order | In Progress | > |
| | 0000005257 | 30/10/2017 | £299.60 | Sales Order | In Progress | > |
| | 0000005256 | 30/10/2017 | £156.75 | Sales Order | In Progress | > |

It gives you; the reference (if you added one), the order number, the date ordered, the value of the order, and the status of the order. By clicking the chevron **(A)** at the end of each line you will be taken to that specific order on the history page, or you can get there by clicking the 'History' tab **(3)**
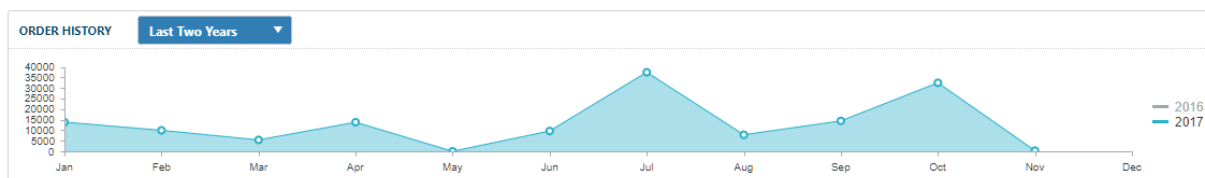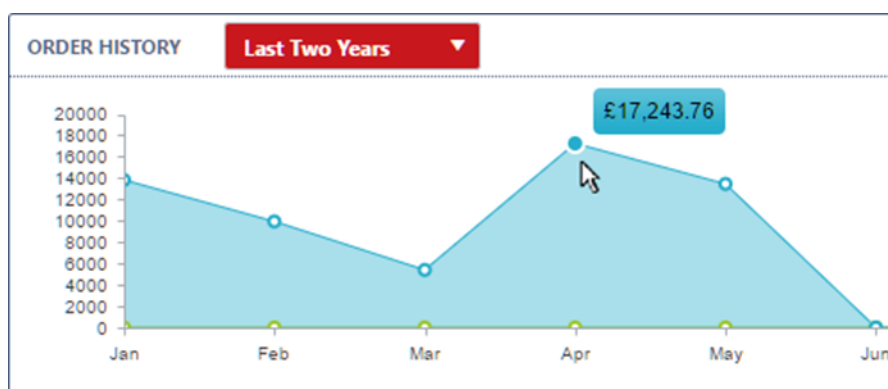
## 5.3. **Full Overview of Orders**
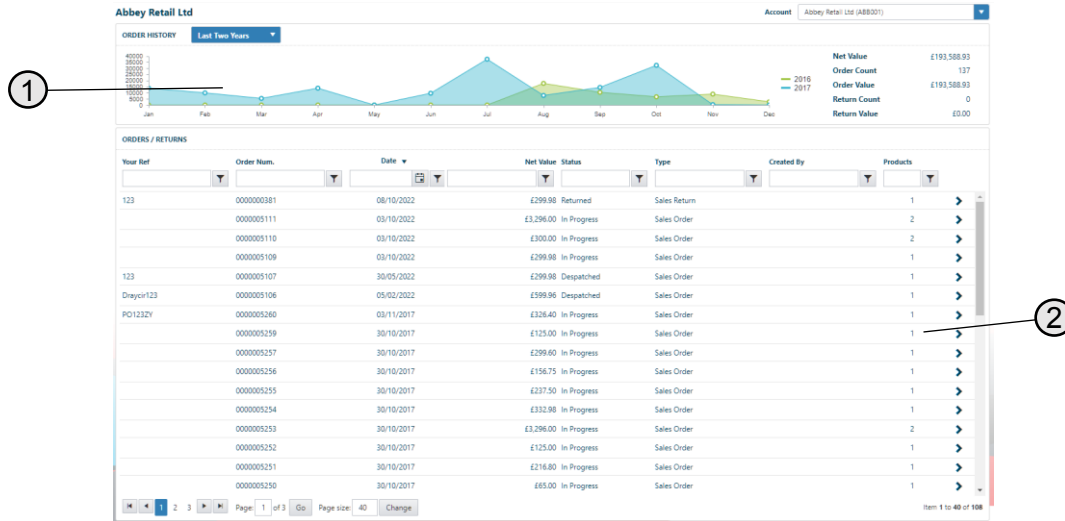


At the top of the page **(1)** there is a graphical display of your invoice history with the net worth of your invoices displayed over a certain time period.



You can click the drop-down box **(A)** to change the time period that you are looking at; the last 2 calendar years including the one you are currently in, the current year up to the current date, the last two months, and from the beginning of the current month up to the current date.

By clicking on one of the years in the key **(B)** you can remove that year from the graph or add it back in.



By hovering your mouse over one of the data points **(C)** you can see exactly what the net worth of the orders were during that time period.

| | |
|---|---|
| **Net Value** | £193,588.93 |
| **Order Count** | 137 |
| **Order Value** | £193,588.93 |
| **Return Count** | 0 |
| **Return Value** | £0.00 |

The section in the top right **(D)** gives you a total for the; net value, order count, order value, return count, and return value for the full time period that you have currently selected

The main section on the page **(2)** gives you a full history of all your orders since your account was created telling you; the reference (if you added one), the order number, the date ordered, the value of the order, and the status of the order for every order you have placed.

A

## 5.4.    Details of Individual Orders

Clicking the chevron **(A)** at the end of each line you will display a breakdown of the order on that line, including; item codes, a description of each item, the quantity of each item purchased, how many have been dispatched, the value of the items you purchased and, the value, VAT and total cost of your order.
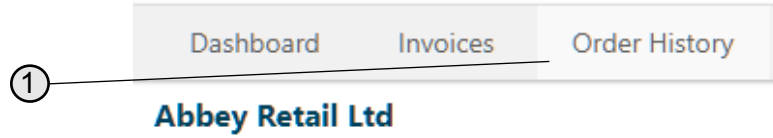


There is also a link you can use to send any enquires you might have about the order to the seller **(A1)** and view any documents that have been sent between you and the seller **(A2).**

You can also change the number of orders shown on every page by changing the number in the box **(B)** and clicking change, so that you can view every order on one page.

## 5.5.      How to Find an Order

Firstly, you will need to be on the 'Order History' tab, which you can get to by clicking the link at the top of the dashboard page **(1).**



That will take you to the following page.
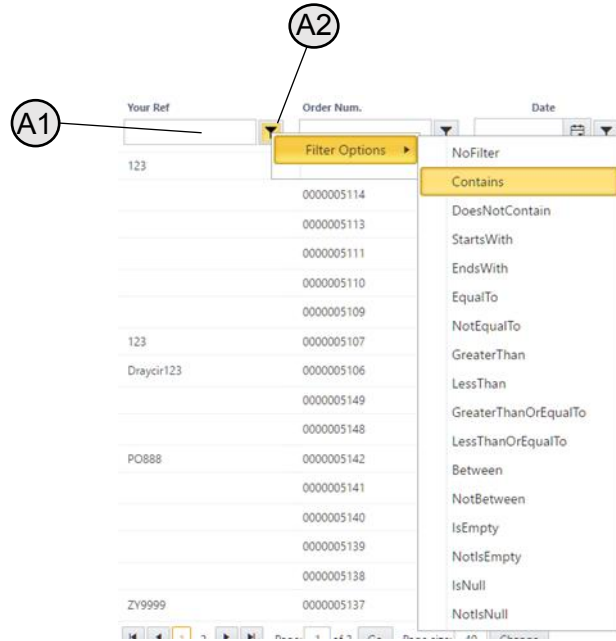
## 5.6.      Filtering for Orders



You can then use the filters at the top of the page **(A)** to find a specific order or a group of orders which share a common characteristic.

First you can filter for your order references, you can do this by typing a code into the box **(A1)** and then clicking the filter button **(A2).** You can then chose if you want to filter for references that; contain that code, does not contain that code, starts with that code, ends with that code, is exactly that code, is not exactly that code, is more than the numerical value of the code, is less than the numerical value of the code, greater or equal to the numerical value of the code, less than or equal to the numerical value of the code, between two values, not between two values, is empty, is not empty, is noll, or is not null.

You can repeat this process in as many of the filters as you need to find a particular order or group of orders.
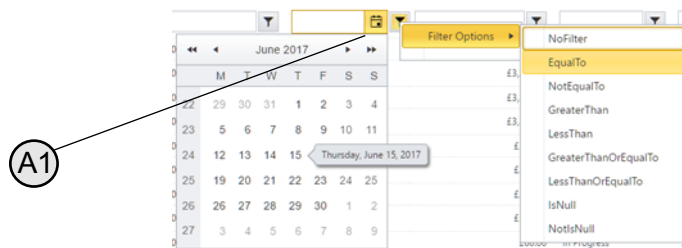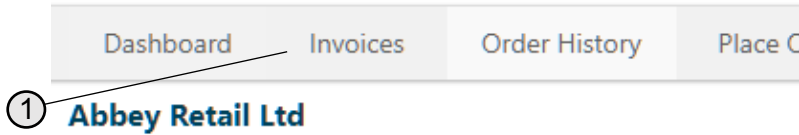


When filtering for a date you can type the desired date into the box directly or use the date selection tool by clicking the icon (A1) and then use the filter options drop-down box to filter as needed.
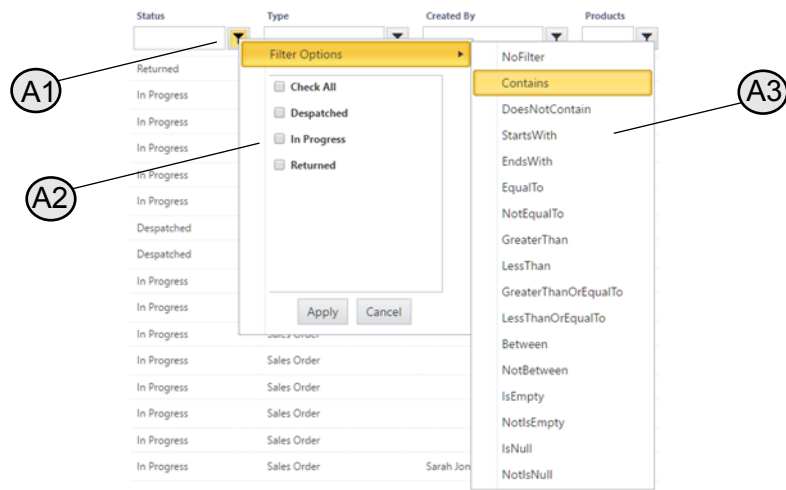
You can also filter status by clicking on the filter icon **(A1)** and then checking the box next to any desired status **(A2)**. You can still further filter your results using the filter options drop down box **(A3)**.

# 6. How to Find an Invoice

Firstly, you will need to access the 'Invoices' tab which you can get to by clicking the link at the top of the dashboard page **(1)**.



That will take you to the following page.
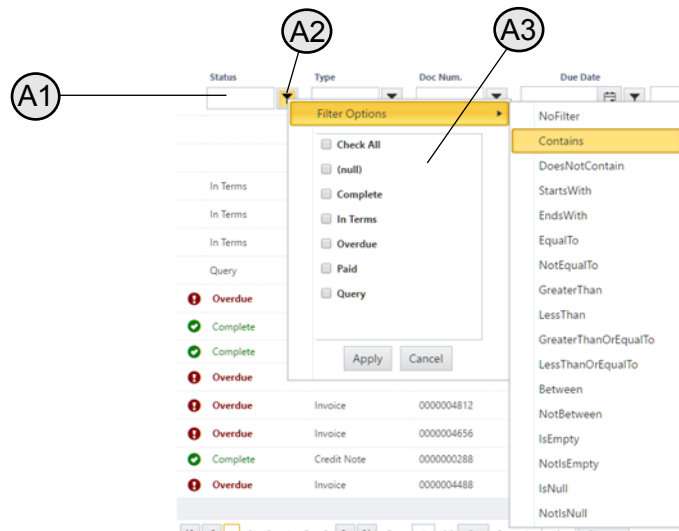
## 6.1.    Filtering Invoices



You can then use the filters at the top of the page **(A)** to find a specific invoice or a group of invoices which share a common characteristic.

First you can filter for the status of your invoice, you can do this by either typing the status of the invoice you are looking for into the filter box **(A1)**, or by clicking on the filter icon **(A2)** and then checking the box of the desired status. You can further filter these results by typing a code into the filter box and using the filter options **(A3)** to look for any statuses that contain that code, does not contain that code, starts with that code, ends with that code, is exactly that code, is not exactly that code, is more than the numerical value of the code, is less than the numerical value of the code, greater or equal to the numerical value of the code, less than or equal to the numerical value of the code, between two values, not between two values, is empty, is not empty, is noll, or is not null.

You can repeat this process in as many of the filters as you need to find a particular invoice or group of invoices which share a common set of factors.
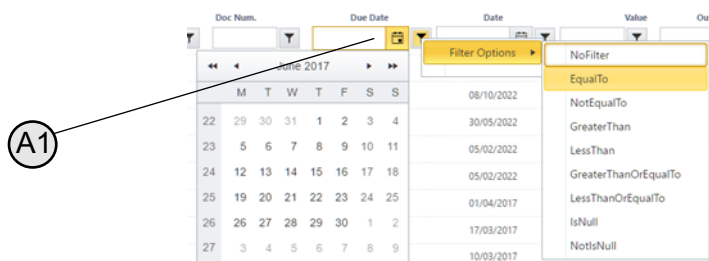


When filtering for a date you can type the desired date into the box directly or use the date selection tool by clicking the icon **(A1)**. You can still further filter your results using the filter options drop down box **(A3)**.

# 7. How to Place a New Order
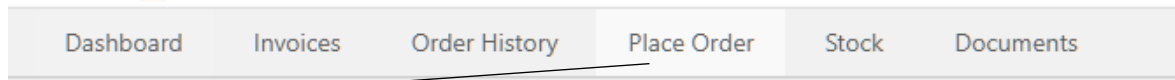


First you will need to access the 'Place Order' tab which you can get to by clicking the link at the top of the dashboard page **(1)**.



## 7.1. Adding a Product to an Order

The first section **(1)** is where you can add individual items to your order.

To order an item you first need to search for its product code or a description of the product in the search box **(A)**.

| Code / Description | | | | Unit | Qty | Unit Cost | Total | |
|---|---|---|---|---|---|---|---|---|
| cabinet | | | | | ▼ | | | Add + |
| **Code** | **Name** | **Alt. Code** | **Your Code** | | | | | |
| **CA/BASE/DBL/BEECH** | **Beech Base Double Cabinet H58cm** | | | | | | | |
| CA/BASE/DBL/OAK | Oak Base Double Cabinet H58cm | | | | | | | |
| CA/BASE/SNG/BEECH | Beech Base Single Cabinet H58cm | | | | | | | |
| CA/BASE/SNG/BEECH | Beech Base Single Cabinet H58cm | Global123 | | | | | | |
| CA/BASE/SNG/BEECH | Beech Base Single Cabinet H58cm | | Abb1138 | | | | | |
| CA/BASE/SNG/OAK | Oak Base Single Cabinet H58cm | | | | | | | |
| CA/WALL/H70/BEECH | Beech Wall Cabinet H70cm | | | | | | | |
| CA/WALL/H70/OAK | Oak Wall Cabinet H70cm | | | | | | | |
| CA/WALL/H92/BEECH | Beech Wall Cabinet H92cm | | | | | | | |
| CA/WALL/H92/OAK | Oak Wall Cabinet H92cm | | | | | | | |

This will bring up a list of products that fit the code or description that you put into the search box and then you can pick from this drop-down list.

| Code / Description | Unit | Qty | Unit Cost | Total | |
|---|---|---|---|---|---|
| CA/BASE/DBL/BEECH - Beech Base Double Cabinet H58cm | Each ▼ | 1.00 | £236.00 | £236.00 | Add + |
| No products selected | Each | | | | |

You will then need to choose a unit type for the product you have chosen by using the unit drop-down box **(B)**, most products will only have one unit type but some can be sold in different forms.

| | Qty | Unit Cost | Total | |
|---|---|---|---|---|
| ▼ | 10.00 | £219.48 | £2,194.80 | Add + |

You can then enter the number of that product that you would like to purchase in the quantity box **(C)**.

The cost of the product **(D)** is the price per unit, which may change if the seller gives a discount depending on the number of units purchased.

The value **(E)** is the price of the entire sale for this product so the cost multiplied by the number of units.

Once you have entered all the information for your desired purchase you can click the 'Add' button **(F)** to add it to your current order.

## 7.2.    Reviewing Your Current Order

The second section (2) is a summary of all the products in you current order.



Each row **(A)** describes a product you have ordered with; a description, a unit type, a quantity, a cost per unit, and the value of that part of the order.

You can delete the order by pressing the bin icon **(B)** at the end of the row.



You can also edit your order by pressing the pencil icon **(B)** which allows you to change the unit type and quantity of that product, you can keep these changes or discard them by pressing the tick or cross buttons at the end of the row **(A1)**.

You can view an image of the product with a more detailed description by clicking the camera icon in the middle of the row **(C)**.
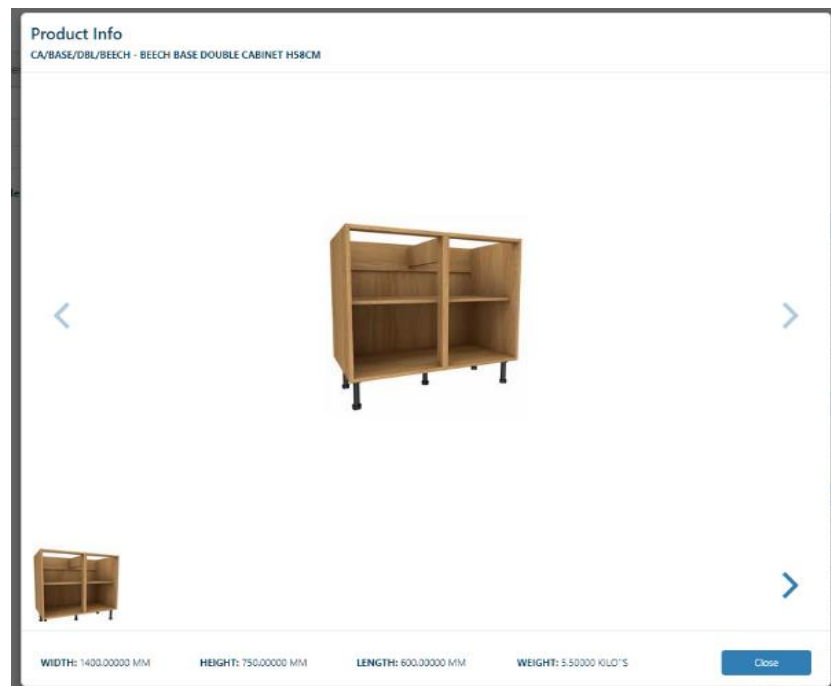
If there is not enough of the product currently available in stock, then a warning triangle will appear next to the quantity **(D)**. You can see how to resolve the problem by clicking on the warning, which will show you a message written by the seller on how they will proceed with an order that is not currently available.
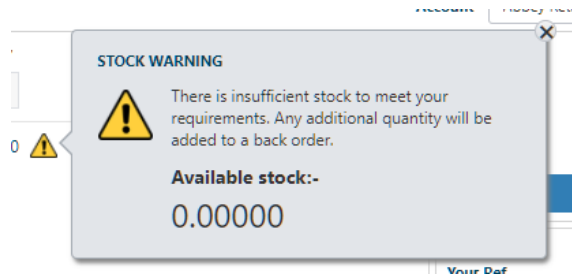


## 7.3.      **Entering Delivery Details**

Once you have added all the products you require to your current order you will need to add your details. First you can add a reference code to your order and a date you require your order by in the box on the right hand side of the screen **(3)**.



You can select a date by either typing one into the box **(A)** or by clicking on the date icon and selecting one using the tool.

Section **(4)** will automatically have your default address entered

You can select from any saved addresses or edit/enter a new one.

You can also add any delivery instructions as required using the text box **(B)**.

## 7.4.   **Placing a Bulk Order**

You can also place bulk orders that you have created using the 'Bulk Upload' button (5) which will bring up the following screen



First you will need to download a template for the bulk order **(A)** to ensure that the file is in the right format.

You will now have an excel file where you can enter a column of product codes **(A1)** and a column of quantities **(A2)** so you can save an order with as many products as needed.

Once you have created your file you can choose whether you keep the headings, if you do keep the option (B) ticked otherwise untick it.

You can now upload your file by either typing in the address of the file into the box **(C)** or clicking the 'Browse' button and finding it in your files (it should be in the downloads folder).



Once you have uploaded your file it should appear next to the browse button. The green circle signifies it is in the correct format.

**(D)** warns you that if you do a bulk upload it will delete any product orders you currently have in the waiting list **(2)**.

Once you have uploaded the file you can press the 'Ok' button **(E)** to add the bulk order.
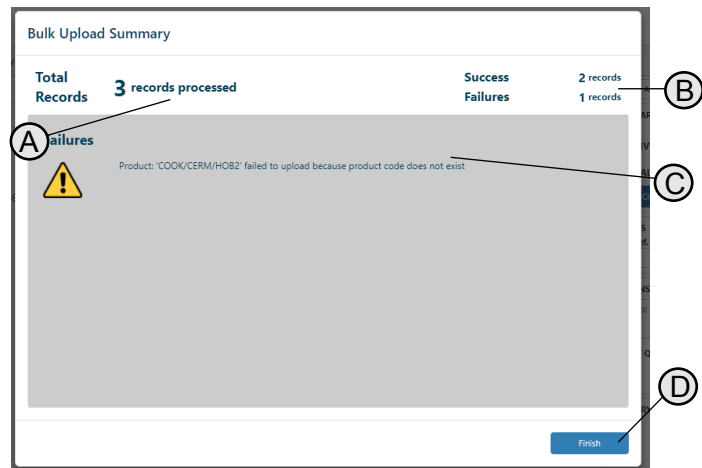
A bulk order summary should now appear with the total number of products ordered (A) the number that have successfully been uploaded and the number that have failed to upload (B). The reasons for any failures will be given in the main section (C) when you have reviewed this information press 'Finish' (D) to upload the products.

When you are happy with your full order you can review the; net value, the delivery cost, the VAT, and the total cost of the order in section (6). From here you can also either clear your order completely to start over or click the 'Place Order' button to send the order through. When the order has been placed, the following box should appear telling you your order number.
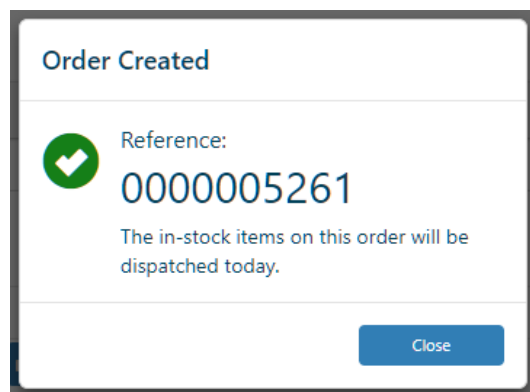


You can review your order, contact the seller, order again, or view any documents in the history tab.

# 8. Repeat a Previous Order
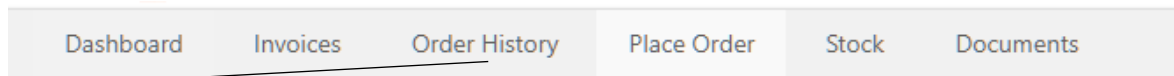


## 8.1. Finding an Order and Adding it to Your Current Order

First you will need to go into the 'Order History' tab which you can get to by clicking the link at the top of the page **(1)**.
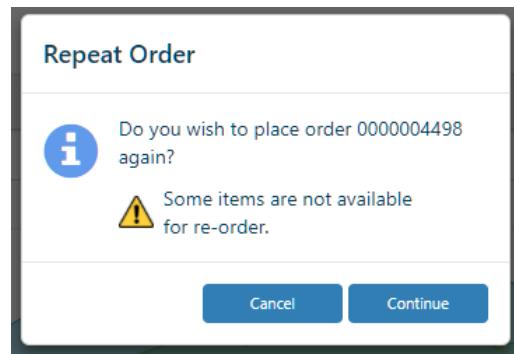


Then you can use the filters at the top of the page **(A)** to look for the order that you are interested in.

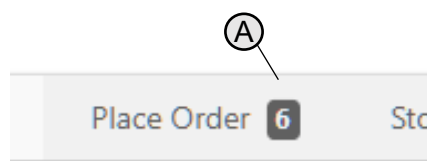Once you have found it click on the chevron **(B)** at the end of the line to open more options.



You can then place a duplicate order by clicking the 'Order Again' button **(B1)** you will then be prompted to confirm the new order.
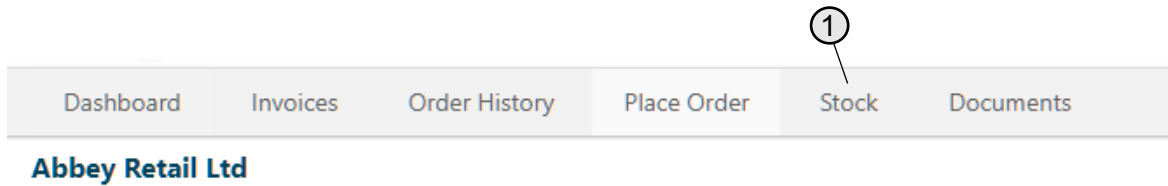
By pressing 'Continue' you will add the products in that order to your current order



If the duplicate order was processed successfully then a banner will appear at the bottom of the screen **(A)**. You can then review this order by going to the 'Order' tab **(B)**.

# 9. Checking Stock Availability & Prices



Firstly, you will need to go to the 'Stock' tab **(1)**
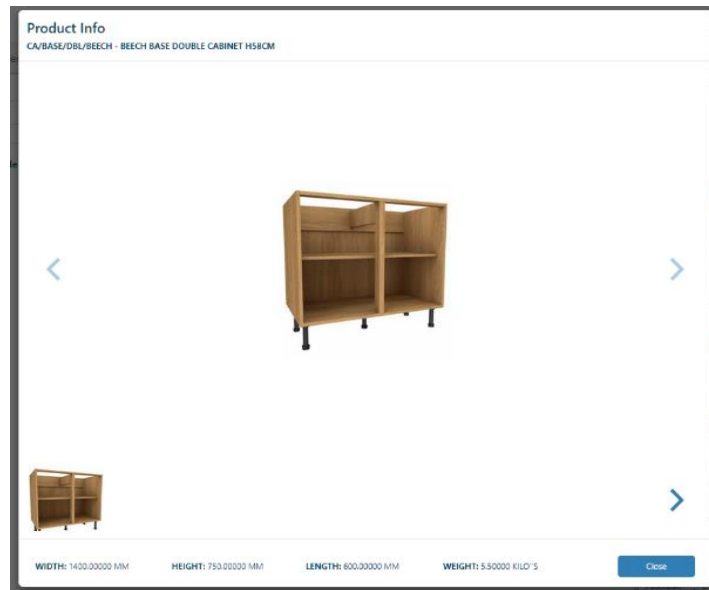
## 9.1.    Searching for a Stock Item



Once you are on the stock page you can search for specific products using the filters at the top of the page **(1)** to look for products with specific characteristics.
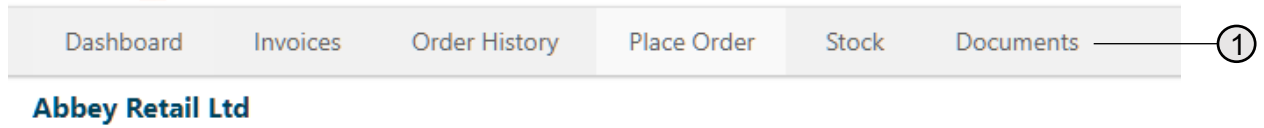
## 9.2. Stock Item Details



You can find more specific product information by clicking on the camera icon on the row of the product you are interested in **(2)** you will also see a picture of the product.

You can see the amount of available stock of a product and the base price for that product by looking at their corresponding columns **(3)**, **(4)**.

# 10. **View Documents**



Firstly, you will need to go to the 'Documents' tab **(1)**.

## 10.1. **Searching for a Document**



This will take you to the page where you can find all your previous documents you have received. You can filter these results to look for specific documents or document types. The first way to achieve this is by checking document types and file formats that you are looking for **(1)** or by searching for documents by date **(2)**.
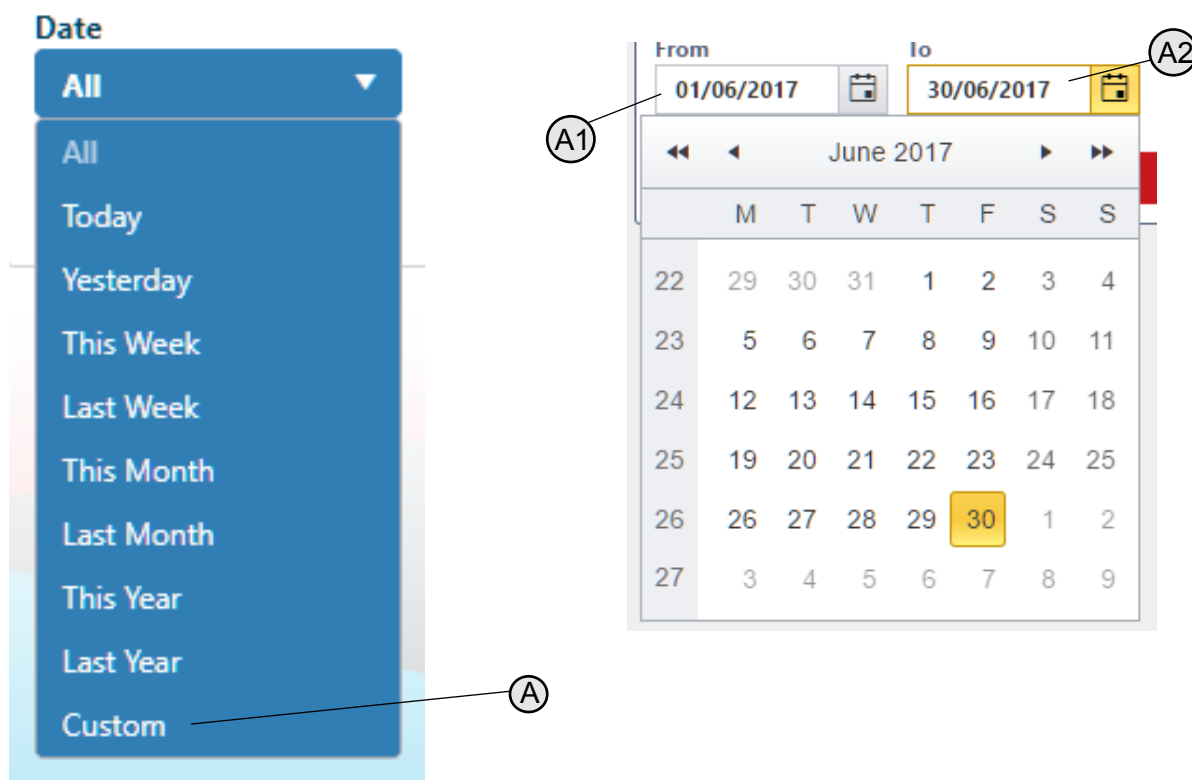
You can also search between two specific dates by clicking on the 'Custom' button **(A)**.

You can then choose two dates by either typing them into the date boxes **(A1)** or using the drop-down date tool **(A2)**.  Once you are happy with the filters you have chosen click the 'Apply' button to filter the documents.

You can also filter the documents by using the reference search at the top of the page **(3)**.

Once you have found the documents that you are looking for you can view them as PDF files by clicking the link on their row on the right **(4)**.

You can also change the number of documents that appear on a page by changing the number in the 'page number' text box and then clicking change **(5)**.