Online Portal

Customer

Users & Groups

The distributor will need to setup the first customer user to initiate the customer portal. Once the super user is created, that customer user can login to create and manage users and user groups for the portal and checkout software.

1. Navigate to Users & Groups
2. Setup Security Groups
3. Setup checkout user groups
4. Setup users and fobs

Allocation Codes

Managing Allocation Codes. An Allocation code is a specific name/value that needs to be assigned when warehouse employees are pulling material: job number , project ID, work station are a few common examples. This allows the customer to run reports and monitor use by a specific project or by a specific work station, etc.

1. Navigate to 'Allocation Codes'
2. Click 'ADD+'
3. Enter the allocation code name
4. Chose who the user will enter the values: freeform or dropdown
5. Enter dropdown options (if applicable)
6. Select the ship to locations it applies to
7. Save & Add

VMI List

The VMI List can be accessed and viewed within the customer portal.

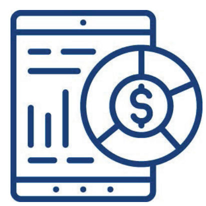
1. Navigate to VMI List
2. Select the Distributor and Location

Which application/ site do I use for what?

Customer Portal - Admin & Buyer Functions
Mobile App - Warehouse Transactions
Checkout Site/App - Consumption Tracking

* Download the app on any android/IOS device: StorerooomLogix and SRX Checkout
* Customer Portal site: https://www.storeroomlogix.com/
* Checkout Site: https://next.checkout.storeroomlogix.com/login

Orders & Quotes



The Orders & Quotes pages is where you can view re-order recommendations to approve and see the status of existing orders.

1. Navigate to 'Orders & Quotes'
2. Select the 'Reorders' Tab to review new orders and approve
3. Select the Orders & Quotes tab to view the status of existing orders

Reports

The reports page is where you can view reports. The most popular reports are the VMI Analysis & Full transactions. Full Transaction: Shows all transactions for a period of time VMI Analysis: detailed anaylsis of VMI changes

1. Navigate to 'Reports'
2. Select the report to run/view
3. add any necessary filters and select the Subscribe button if you'd like to eport the report or schedule it your email on a defined interval.

Storeroomlogix.com
revereelectric.com