Introduction to Bundle Connect

The Bundle Connect is a best in class, laundry management system designed to administer a wide range of laundry processes quickly and efficiently. The platform is based on cloud technology that is automatically backed up and secure. A login is created for every new user with best practice password recovery processes available.

Upon signing up to the service a new user is taken directly into the platform and at the same time they are sent an email that enables the setting up of a password for further access. Sample data is automatically created, designed to give the new laundry user the ability to gain familiarity with the platform prior to importing their own information. This sample information can be removed by pressing the 'Remove Sample Data' button in the My Laundry page under Settings.

The Bundle Connect Support team can be contacted at any time via support@bundleconnect.com. Please use this address for any user experience issues, problems found with the system or any suggestions for future features. Our future development is solely based on demand so feel free to let us know what you believe will make your laundry more profitable.

Main Navigation

The main navigation allows the user to select between each main section of Connect:

- **Laundries Toggle:** Allows you to select between multiple laundries if have you have multiple sites.
- **Quick Action Button:** allows you to quickly create Orders, Stock & Customer
- **Reports Section:** gives an overview and in-depth reports for your laundry.
- **Orders**: allows users to create and administer orders through the multiple stages in your laundry.
- **Invoicing:** Users can seamlessly create orders based on orders.
- **Customers:** Users can create, edit and manage their customers.
- **Settings**: Users can set up stock, their colleagues as users, manage roles, laundry information and their own user information.

🛒 Orders Section

The orders section is made up of filters and three tabs that allow the user to administer the entire order to dispatch process. Orders are sorted into the three tabs based on their status. After the order is created it sits in the pending tab. Here the order can be packed. Once the order has been packed it sits in the Packed tab ready for dispatch. After the packed tab the order cannot be deleted so it is important the order is only dispatched once it is complete and being sent out.
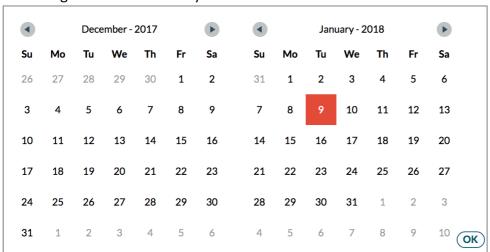
Orders - Filters

In each of the orders tabs the filters provide a way for the laundry to filter the orders.

FILTER ORDERS

| Hilton Sydney ✕ ▾ | Route ▾ | Select a date range | ◯ Today ◯ Tomorrow |

Customer Selection – Dropdown

Western Hospital ✕ ▲
Meriton Suites Kent Street, Sydney
Permiere Hospital
Peters Place
Western Hospital
Western Private Hospital

Route Selection - Dropdown

Route ▲
Southern Route
Northern Route
Route W2

Date Range Selection - Overlay

◀	December - 2017					▶	◀	January - 2018					▶
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	1	2	31	1	2	3	4	5	6
3	4	5	6	7	8	9	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28	29	30	31	1	2	3
31	1	2	3	4	5	6	4	5	6	7	8	9	10

OK
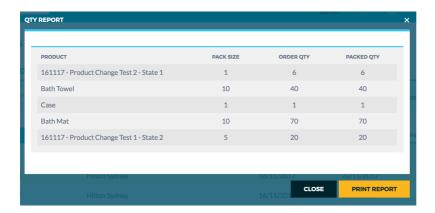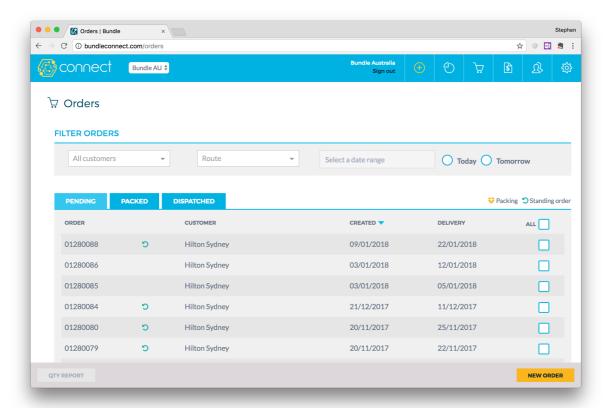
Orders – Quantity Report

In each of the orders tabs the Quantity Report provides a way for the laundry to report on the stock of a number of orders to view upcoming stock requirements of the days orders or reconcile dispatched orders.

To use the Quantity Report simply tick the box to the right of the orders you want to combine for the report. Then press the **QTY REPORT** button on the bottom left of the page. More than one order needs to be selected to use the report.
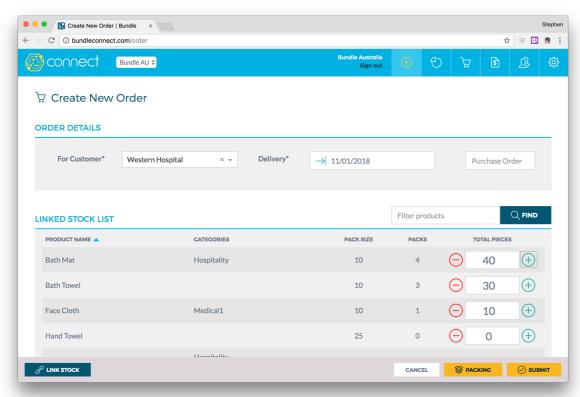

Orders - Pending Tab

The Pending Tab holds all orders that are created and not packed or dispatched. Orders that are current being packed are also shown here. If an order is being packed a yellow box icon will appear to the left of the customer name. Orders that are set up as reoccurring are displayed with a green circle. To create a new order simply press the New Order button.

Orders - New Order

The New Order page allows the creation of New Orders. Simply select a customer, delivery date and enter a purchase order number if applicable. After a customer is selected their stock will show. If no stock has been linked to the customer yet you will see a link stock button in the stock section. The user can then add stock by pressing the + button next to the item or entering an amount directly. To change the date or to set up a reoccurring order press on the date field to bring up the **Date Selection Overlay**.

Single Date Selection

Press the quick filters on the left to quickly select one of the next 4 available days.

Or select a day in the future that is not an available day.

Role based: Orders Roles can select beyond the cut off time up until todays date, whilst Admin Roles can select any date, even in the past.
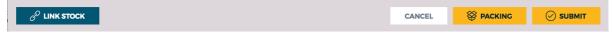
Reoccurring Day Selection

Press the reoccurring icon to change the overlay to a reoccurring order selection.

Reoccurring orders repeat the same order on the day selected.

Reoccurring orders can only be set up on available days.

Orders - New Order – Action Bar

The new order action bar allows the cancelling of orders. The bar allows the quick **LINKING OF STOCK** items to the customers, **SUBMITTING** the new order or moving the order directly to the Packing Stage by pressing the **PACKING BUTTON**.
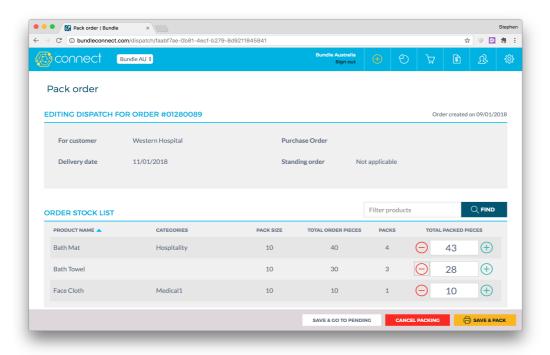

Orders - Edit Order Page & Action Bar

The edit order page is the same as the new order page except for the action bar allows the deleting of orders. The user can also save any changes to an order by pressing the update button.
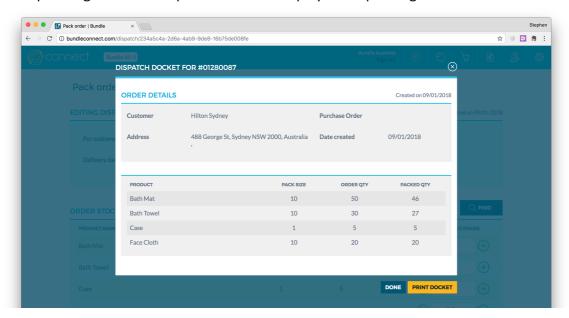

Orders - Pack Order

The pack order page allows the packing of orders. Here the user can enter any varying amounts packed than what was ordered. When the order is packed they press **SAVE & PACK and the order is sent to the packed tab and the dispatch docket is displayed.**
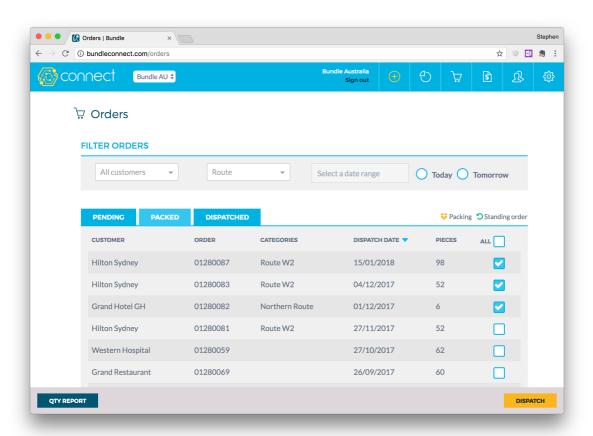
Orders – Dispatch Docket

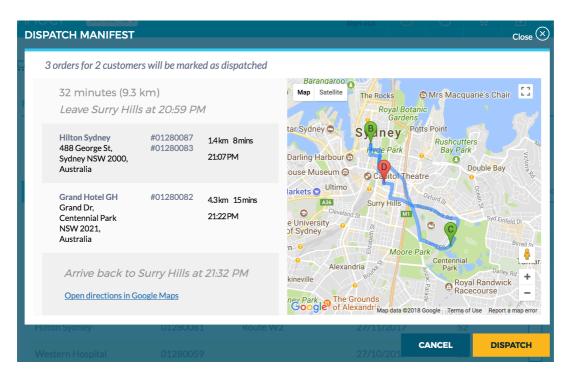After pressing PACK the dispatch docket is displayed for printing.

Orders - Packed Tab

The Packed Tab holds all packed orders waiting to be dispatched. To dispatch one or multiple orders, simply tick the box to the right of the line and press the Dispatch button. You will then see the Dispatch Manifest overlay.
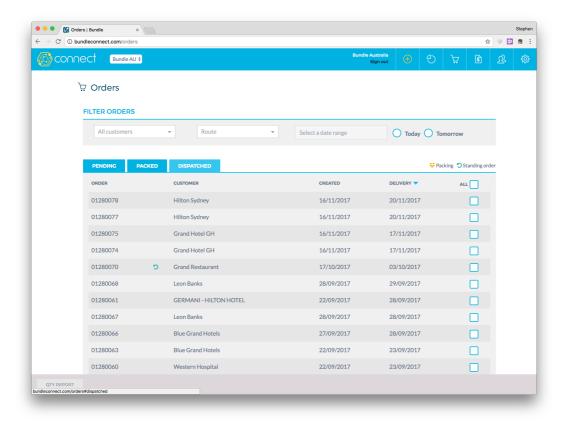
Orders - Packed Tab

The Dispatch Manifest displays all the dispatched orders on the quickest route using Google Maps. This can also be sent to the driver's phone.
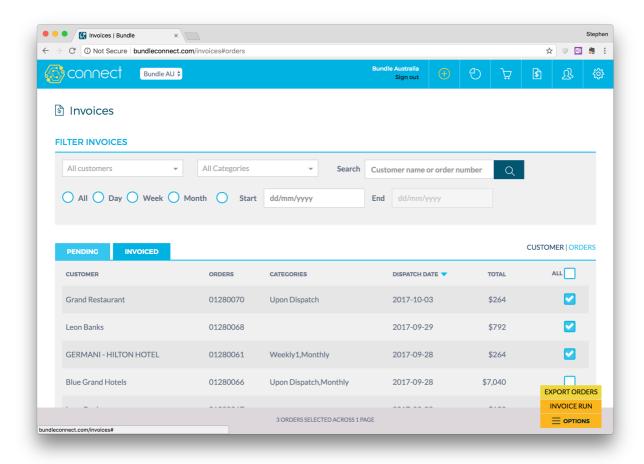

Orders - Dispatched Tab

The Dispatched tab displays all the orders that have been dispatched. This tab provides a historical reference for all orders fulfilled to date. Orders at this point can also be viewed in the Invoice Section, inside the Pending tab.
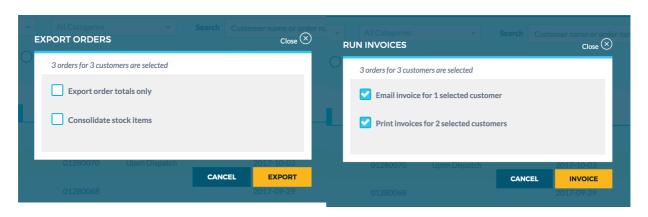
Invoice Section

Invoices - Pending Tab
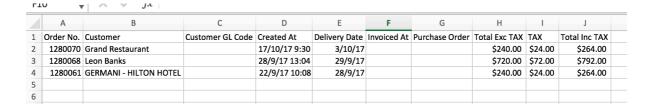
Once an order has been dispatched the order will appear in the Pending invoices tab. Here users can filter the pending invoices by customer, date range or billing category and either export the order data or do an invoice run. The invoice run generates invoices for all the selected orders. The order export downloads the order data in a CSV.

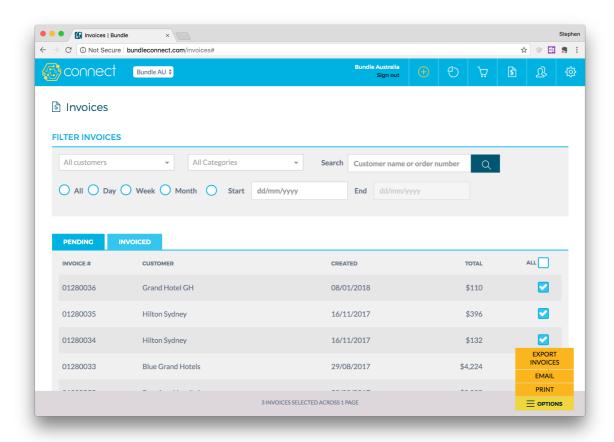## Invoices – Orders Export & Invoice Run Overlays

Invoices – Orders Export (CSV)

	A	B	C	D	E	F	G	H	I	J
1	Order No.	Customer	Customer GL Code	Created At	Delivery Date	Invoiced At	Purchase Order	Total Exc TAX	TAX	Total Inc TAX
2	1280070	Grand Restaurant		17/10/17 9:30	3/10/17			$240.00	$24.00	$264.00
3	1280068	Leon Banks		28/9/17 13:04	29/9/17			$720.00	$72.00	$792.00
4	1280061	GERMANI - HILTON HOTEL		22/9/17 10:08	28/9/17			$240.00	$24.00	$264.00
5										
6										

Invoices - Invoiced Tab

The Invoiced Tab displays all the invoices generated by Connect. The user can either press the line to view the Invoice or tick the box to the right to Export, Email or Print each Invoice.

Invoices – Invoices (Export CSV)

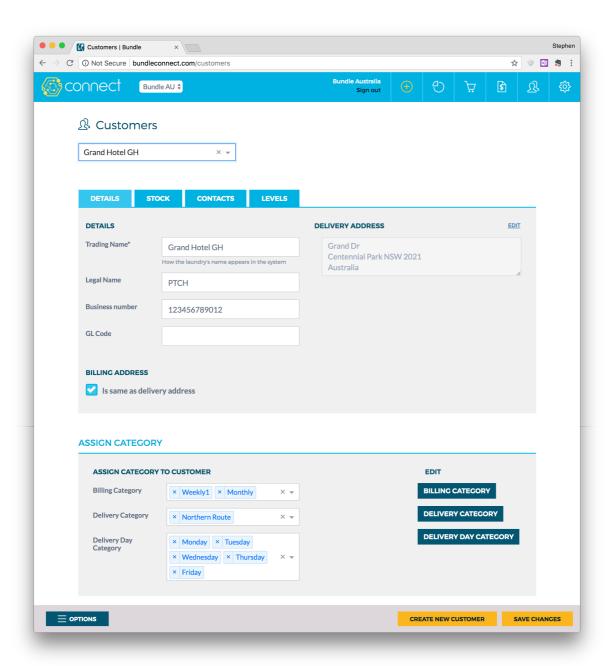|	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Invoice No.	Order No.	Customer	Customer GL Code	Ordered At	Delivery Date	Invoiced At	Purchase Order	Stock Item	Stock Code	Stock GL Code	Stock Weight	Stock Unit Price	Order Quantity	Total Exc TAX	TAX	Total Inc TAX	Created At
2	1280036	1280074	Grand Hotel GH		16/11/17 11:26	17/11/17	8/1/18		Large Towels			0	$5.00	5	$25.00	$2.50	$27.50	8/1/18 12:37
3	1280036	1280074	Grand Hotel GH		16/11/17 11:26	17/11/17	8/1/18		QS Queen Sheets			0	$0.00	1	$0.00	$0.00	$0.00	8/1/18 12:37
4	1280036	1280075	Grand Hotel GH		16/11/17 11:29	17/11/17	8/1/18		Large Towels			0	$5.00	15	$75.00	$7.50	$82.50	8/1/18 12:37
5	1280036	1280075	Grand Hotel GH		16/11/17 11:29	17/11/17	8/1/18		QS Queen Sheets			0	$0.00	5	$0.00	$0.00	$0.00	8/1/18 12:37

![icon] Customers Section

The Customers section is where all the customers data is managed. There are four main tabs in this section; Details, Stock, Contacts and Levels.
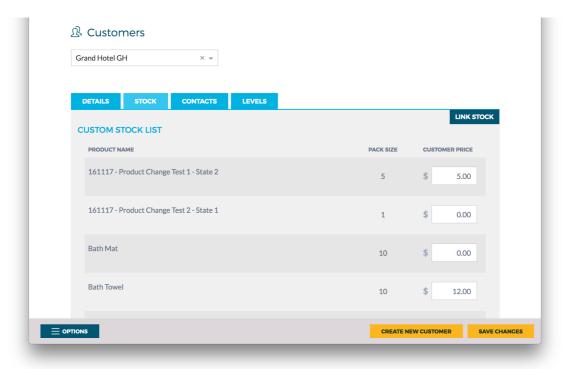
Customers – Details Tab

The details page stores all the customer information used for ordering and invoicing. Google is used to look up their address to make it quick and precise for the map routing. In the assign category section categories are managed and assigned to each customer. These categories cover Billing Periods, Delivery Routes and Delivery Days.

Customers – Stock Tab

The Stock Tab controls the allocation of stock to each customer. To allocate stock the user presses the Link Stock button and uses the overlay. Once linked the user can set custom stock pricing for each item or retain the default from the master stock list.
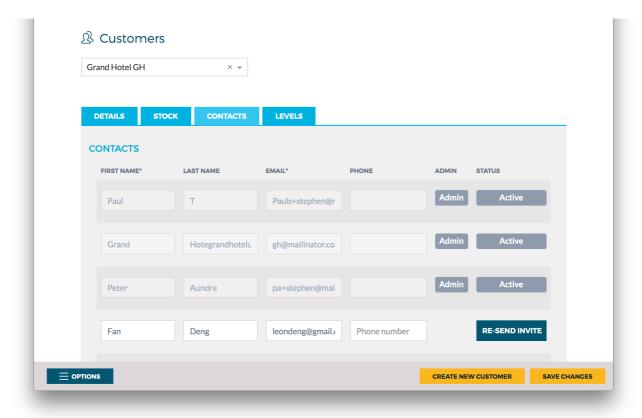

Customers – Stock Tab

To allocate stock to customers users simply tick the box next to the items and then press save changes.
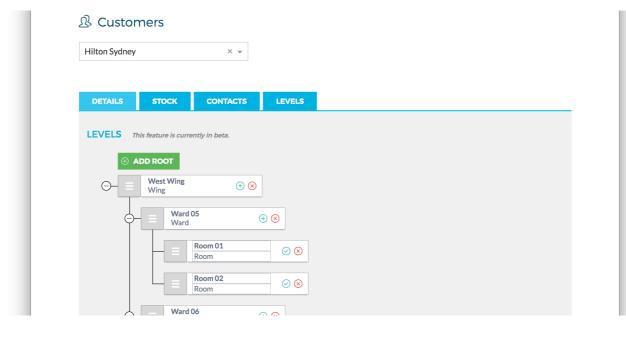
Customers - Contacts & Invite Customer Tab

Your customers contacts can be managed in the Contacts Tab. This tab is also where your customers are invited from, so they can place orders and view invoices. To invite a customer user, enter their contact details and press **INVITE.** They will then receive an email at which point they can set up a password and start ordering.

Customers - Levels (BETA)

The Levels tab allows customers to set up sub levels within their customer sites so they can order different stock items to different addresses. This is also used to manage the RFID individual allocation of items to employees.
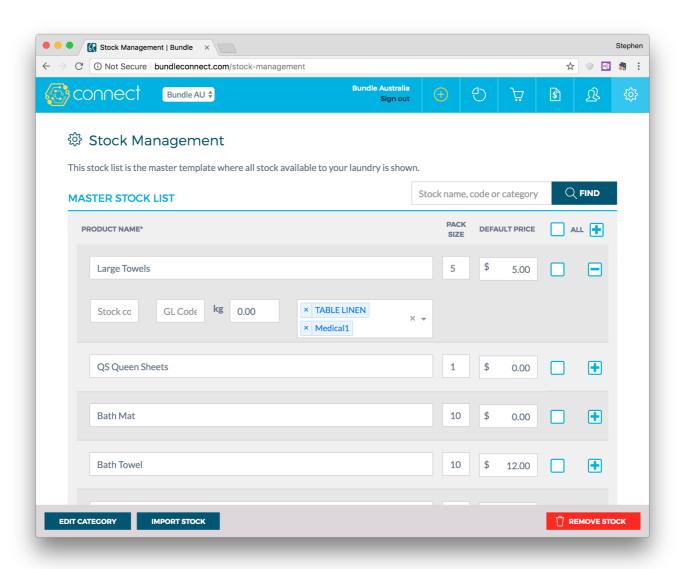
⚙ Settings Section

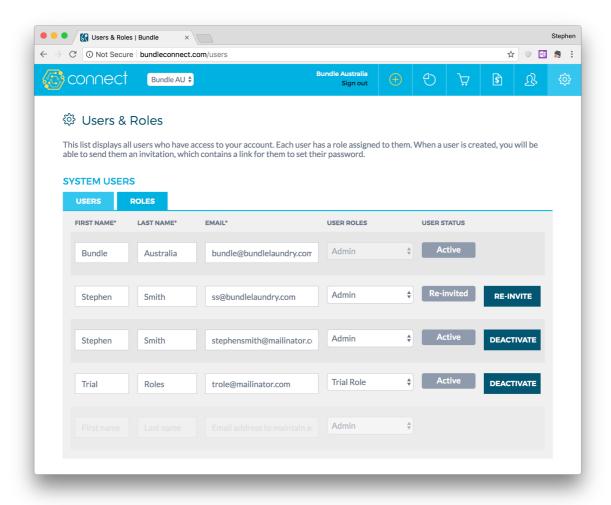The setting section is where all the settings are managed.
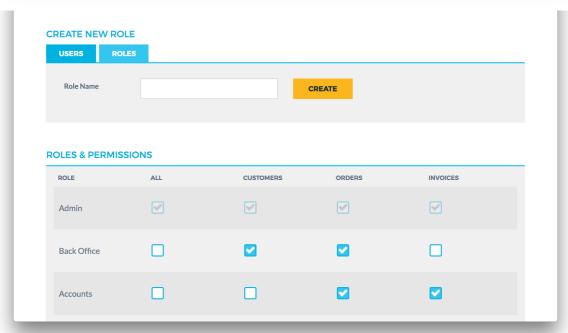
Settings – Master Stock

The master stock section allows the setup of all laundry stock items. Here they set up the Name, Pack Size, Default Price, Stock Code, GL Code, Stock Weight and allocate the stock categories. Users can also import stock from other systems.
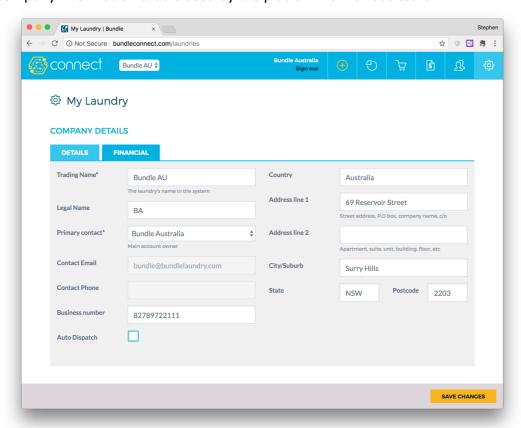
Settings – Users & Roles

The Users and Roles page manages the laundries users. Here they can set up different roles for each user within the business, allowing for the specialty nature of employees. Admin users have access to the whole system. Orders users can only see the orders section, Accounts users can only see the invoice section, and back office users can only see the customers and orders sections.
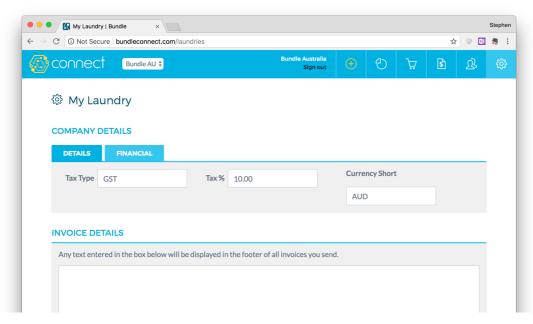
Settings – My Laundry

The My Laundry page is where the Laundry information is setup and managed. This page consists of two tabs; Details and Financial. In the details tab the Laundry sets up their company information that is used by the platform for various tasks.
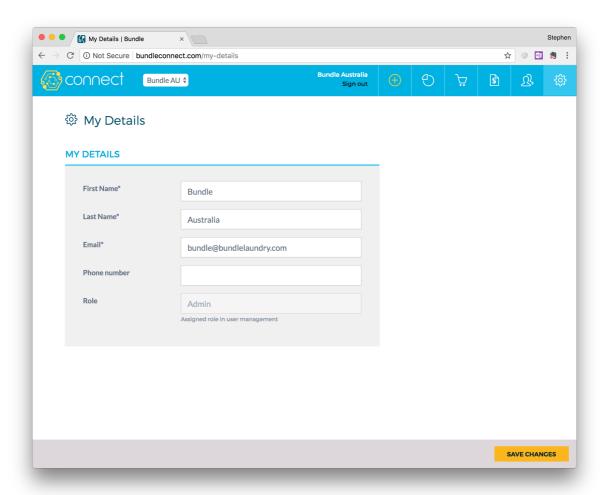

The financial tab controls the invoicing, tax and currency information. This tab automatically sets up this information based on the location of the user registering the laundry. However it is important that the laundry checks this information is correct.

Settings – My Details

The manage details page allows users to manage their details and view their allocated role.

🖼 Customer's Portal

Please see the below video to view what the customers see and how they get started after the invite message is sent to them.

https://www.dropbox.com/s/kh8tw69k76gleme/CustomerOnboarding.mov?dl=0

YOUR INVITATION TO BUNDLE CONNECT

You've been invited to Bundle by *Bundle AU*

VERIFY YOUR EMAIL

Please click **this link** to verify your email and set your Bundle Connect account password.